e-Granthalaya

A Digital Agenda for Library Automation and Networking

Ver.3.0 (2007)
(Network Edition)

User Manual

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Amendment Log

Version No	Date	Change No.	Brief Description	Sections changed
1.0	01/12/2007	-	First Release	-
2.0	15/09/2010		Second Release	-
3.0	04/07/2012		Third Release	
4.0	01/01/2017		Forth Release	

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NOTE
You can Start Data Entry of Books in 'Retro-Conversion' Under Cataloging Module. For Details, Read "Chaper 5: Cataloging Module – Retro-Conversion" of the User Manual

Modules

1. **ADMIN**
   a. Create User and Library Account
   b. Create Letter Text for Letters, Reminders, Orders, etc
   c. Create Subject, Publisher, Vendor Directory

2. **BOOKS ACQUISITION**
   a. This Module is used to Automate the Purchasing Process of the Books

3. **CATALOGING**
   a. Enter Books Records Direct in 'Retro-Conversion' with Catalog, Purchasing and Copy Details in a Single Form
   b. Update Details of Catalog and Holdings Records
   c. Generate Bar Code Labels
   d. Stock Verification
   e. Change Copy Status

4. **CIRCULATION**
   a. Register Members
   b. Issue / Return of documents
   c. Send Reminder for Over-Due Books

5. **SERIALS**
   a. This module is used for SERIALS Subscription

6. **MICRO DOCUMENTS**
   a. This module is used for Articles, Chapter and News Indexing

7. **BUDGETS**
   a. Used for Budget Control and Bill Processing

8. **SEARCH**
   a. Used for Search

C O N T E N T S

Chapter 1
General Considerations

1.1. System Setup

1.1.1. Date Setup

Short Date Format of the System (Server PC as well as Client PCs) must be set to US Date Format i.e "**MM/dd/yyyy**" while date separator must be set to "/" only. However, you will enter the date during data entry in e-Granthalaya Client Program in "dd/MM/yyyy" style , e.g. 27/02/2010.

 How to setup date format

 1. Go to **START** >> **Settings** >> **Control Panel**
 2. in Windows Server XP/Vista/Win7/2003/2008: Under "**Control Panel**" >> double click the **Regional And Language Options**
 >>Press **Advance/Customize** button >> Select **DATE** Tab
 3. Under the **DATE** Tab >>in "**Short Date Format**" type/select the format i.e. "**MM/dd/yyyy**" and save it (MM must be in caps)
 4. This is done once, however, users are suggested to check it regularly because some times it automatically gets changed to Indian format i.e "dd/MM/yyyy"

NOTE: In case any date format related error is thrown by the e-Granthalaya during data entry then check this date format and correct it as above.
 2.
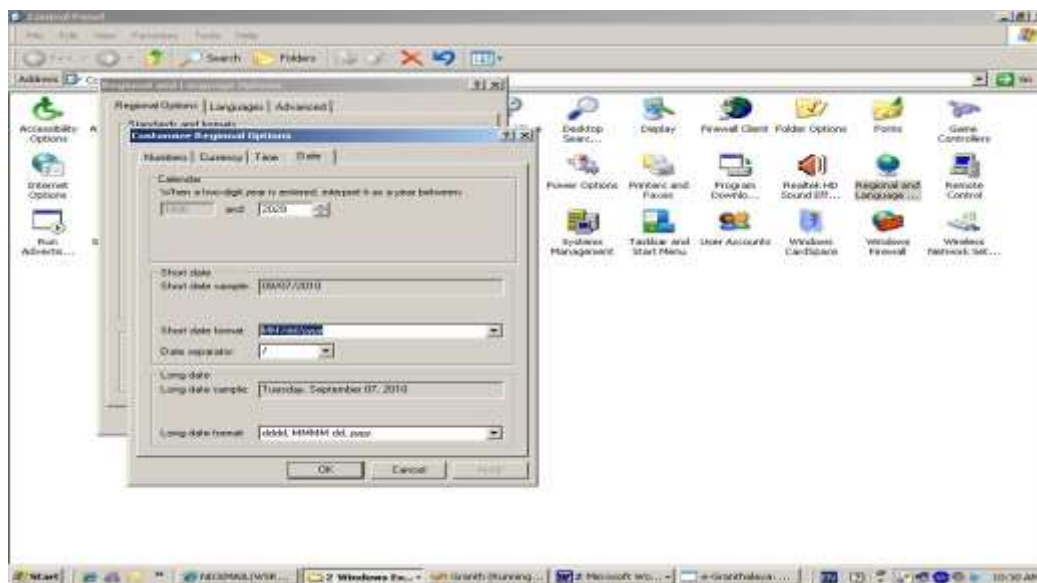
1.1.2. Date format in the Forms (for Data Entry)

While entering the data in the software the format of the DATE must be in Indian Format i.e "**dd/MM/yyyy**" e.g. 25/11/2005. Year should always be in the 4 digit

1.2.   Meaning of Action Buttons

ADD NEW	=	To add new record
EDIT	=	To edit/change the existing Record
DELETE	=	To delete the existing record
SAVE	=	To Save the new record
UPDATE	=	To save the changes after edit
CANCEL	=	To cancel the current event
OK	=	To go for further option
EXIT	=	To exit from the form
SEARCH	=	To search the existing record
PRINT/REPORT	=	To generate the Report

NOTE: Use TAB button on the keyboard to go to the next available field or use the Mouse to jump to next field/text boxes

1.3.   Type of Fields

Mandatory Fields   : Shown in the Red Color, values are mandatory
Optional Fields   : Users can leave such fields blank if no data available
ID   : ID field is *system generating*, no value will be assigned while adding new or editing the existing record. However, this field can be used to retrieve the existing records
CODE   : This field is mandatory, requires alpha-numeric value, must be unique

CAT NO   : This value is numeric in nature and generated automatically on saving a new catalog record in the system − it is a Record Number and not linked with Accession Number. The fields which are not enabled / write protected, users are advised not to try to add any value in such fields.

1.4.   Automatic Filled Fields

In the following fields, values are "Automatically" filled while saving the records on New addition or on Editing.

USER CODE: The USER CODE who is logon to the software
DATE ADDED: Current Date of the System
DATE MODIFIED: Current Date of the System
   3.

1.5.   Enabled or Disabled Fields / buttons

While working with this software, you will find that many of the text fields and buttons are *enabled* or *disabled*. Enabled controls can be used while disabled controls are locked. This process of enabling and / or disabling is pre-decided, therefore, user should not worry about the controls.

1.6.   Screen Resolution
The Software is best viewed in the 800x600 screen resolution

1.7.   How to Enable Local Language for Data Entry in e-G3

a. e-Granthalaya Software is a multi-Lingual tool to enter the data in local language supported by the Windows Operating System. Windows supports 10 Indian Scripts and about 15 local languages. For data entry in local language do the following:-

b. **First** you must install the "***Language Pack***" from the Operating System CD in the Server PC as well as Client PCs. For installation of the Lang Pack (if not already installed) > go to START >> Control Panel >>Regional Language and options – as given in the following screen (In Win XP/Vista), **Win 7 Lang pack pre-loaded, so skip this step.**

c. In the following screen click the two check boxes given at the bottom of the screen and press OK
    4.
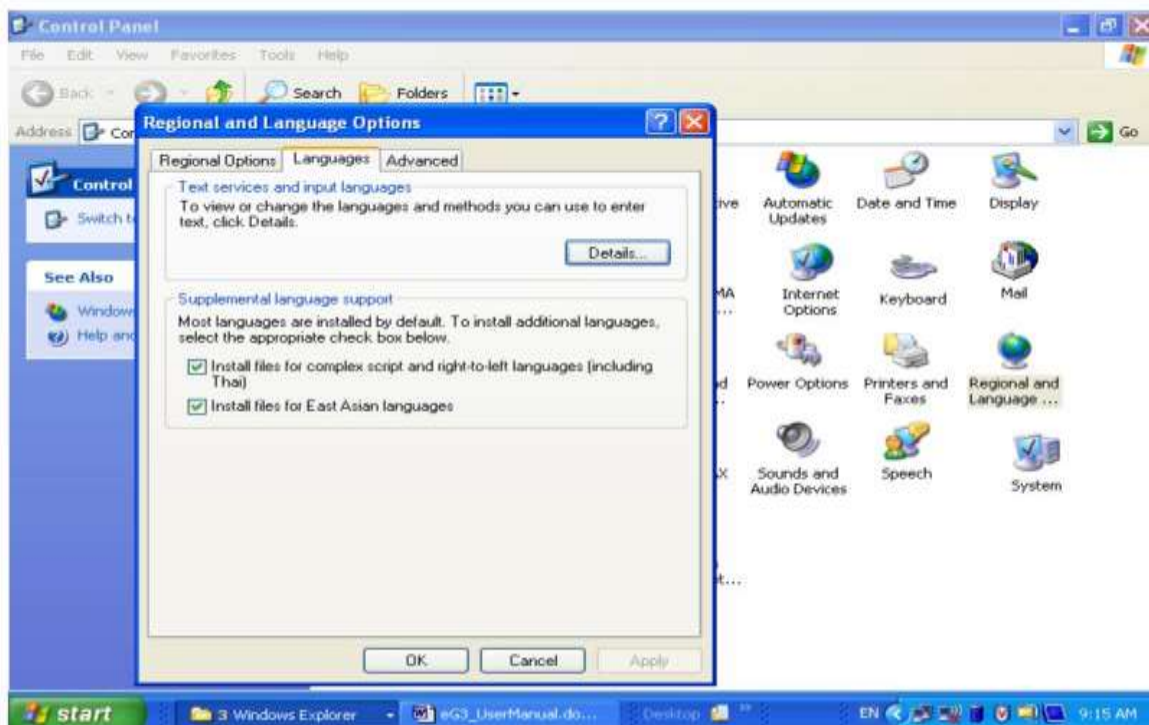
d. Insert the CD of the Operating System in CD drive and Press OK to install the Language Pack along with the UNICODE fonts.

e. After installation of Lang Pack, reboot the PC and do the following steps

f. After installation of the 'language pack', you can enable the local language on keyboard level for data entry in the local language option under Control Panel >> 'Local and Regional Language Setting'.

    5.
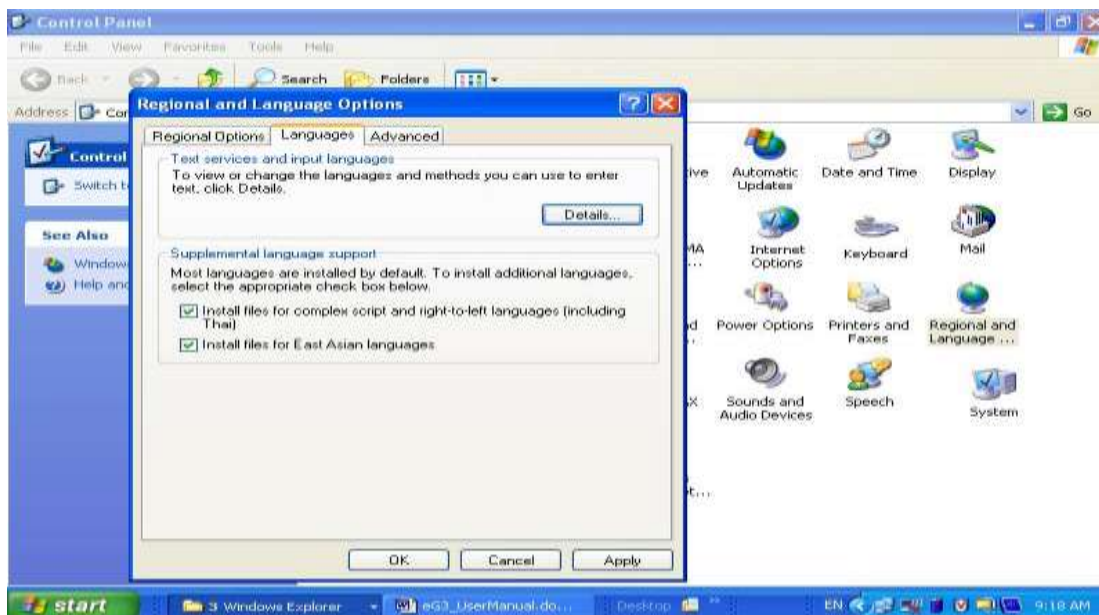
g.   In the above screen press **DETAILS** button to set the language for data entry

f. Press **ADD** button to add the Language then select Input Language and Keyboard from the drop-Down and Apply the Setting. Here you must create the key combination for Toggle on and off for particular language.
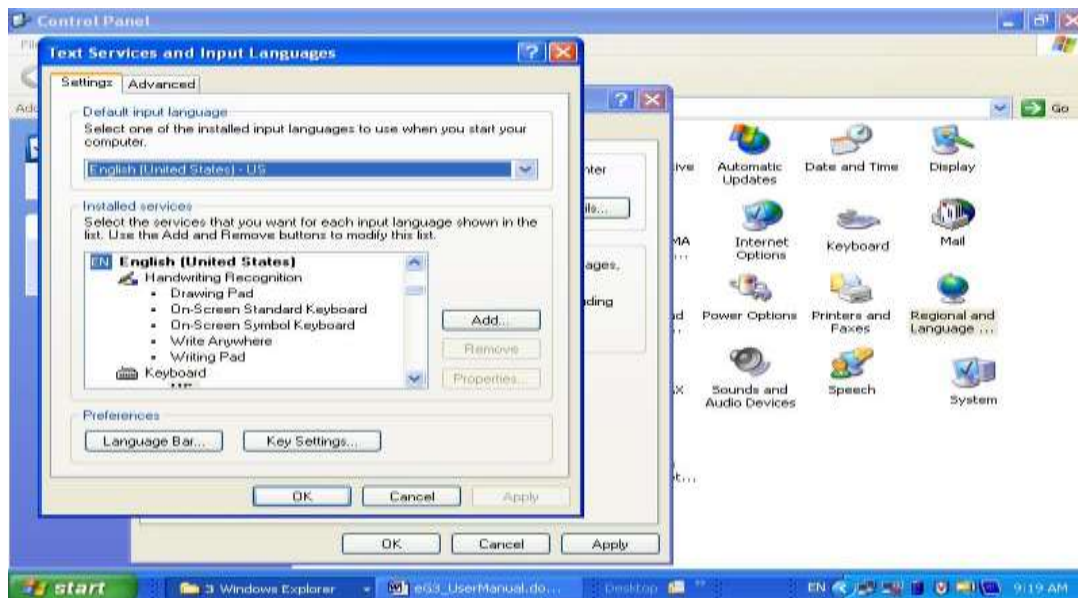
g.For Typing the data in local language now you need to install some Phonetic tool which will transliterate your English input to local language. One such Tool for Hindi typing is provided in the CD of the software. Another typing tools are also available from Google which you can direct install from the google site as given below: http://www.google.com/ime/transliteration/
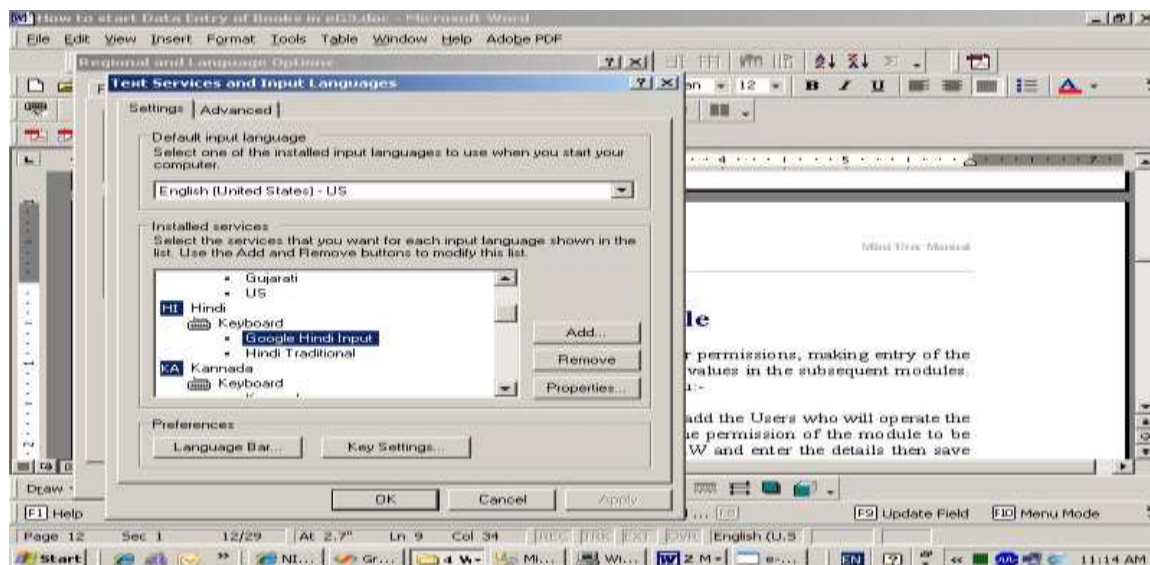
NOTE: For Data Entry in Local Language you must **toggle on/off** the language from Language bar displayed on the Status Bar of the Windows in bottom screen.

1.8.   How to Display Logo and Background Image

a. To display Logo, put your logo file on the following location with the file name -
"*C:\LIBRARY/Client_Logo.gif*"

b. To display background, put your image file on the following location and
file name must be "Library.jpg" , location : "*C:\LIBRARY\library.jpg*"

1.9.   Email Integration

e-Granthalaya is well integrated with the Email facility where many of the communications generated from the software can be sent direct to the users email account. These communications include Approval Form, Order Form, Reminder to the Publishers, Overdue Notices, CAS/SDI list, etc.

How to Setup Email Account using GMail Account

Step 1: Start Microsoft Outlook 2007/2010 from All Program List under Microsoft Office:
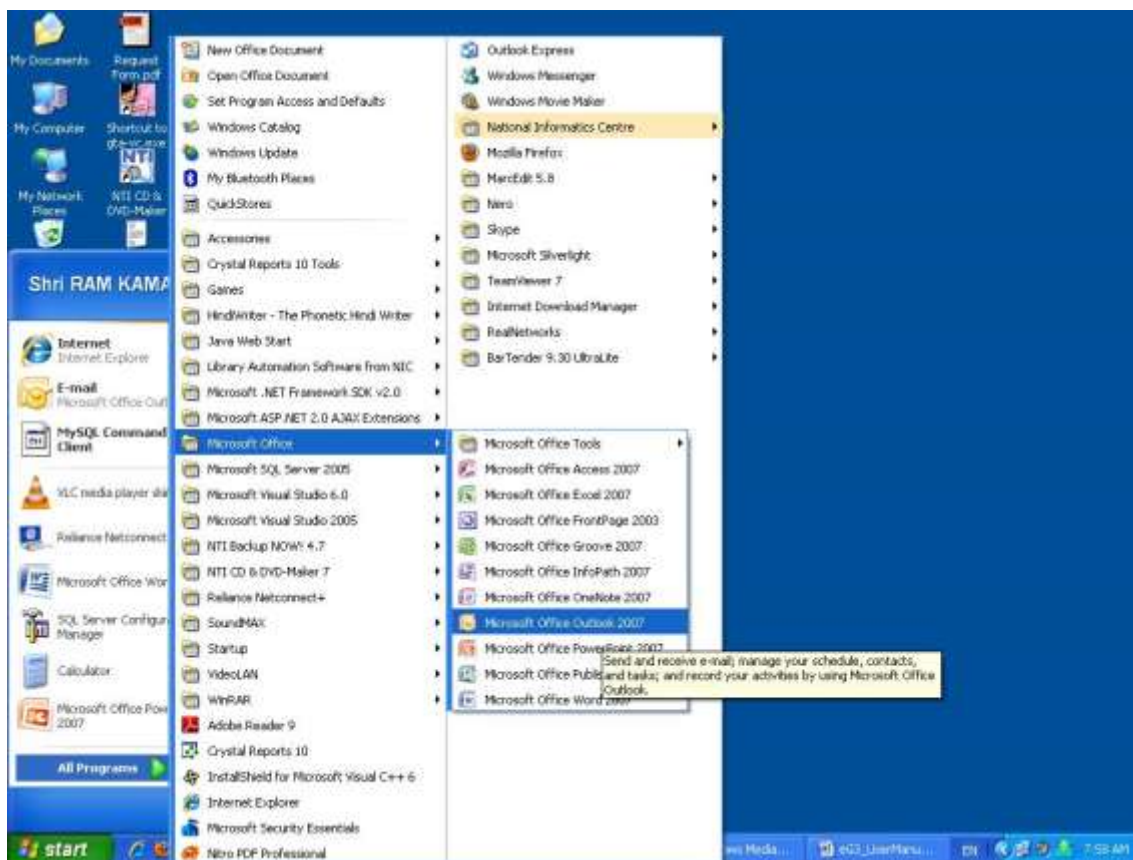
Step 2: In case no mail account set already, following screen will appear – type your gmail address with password and press NEXT button
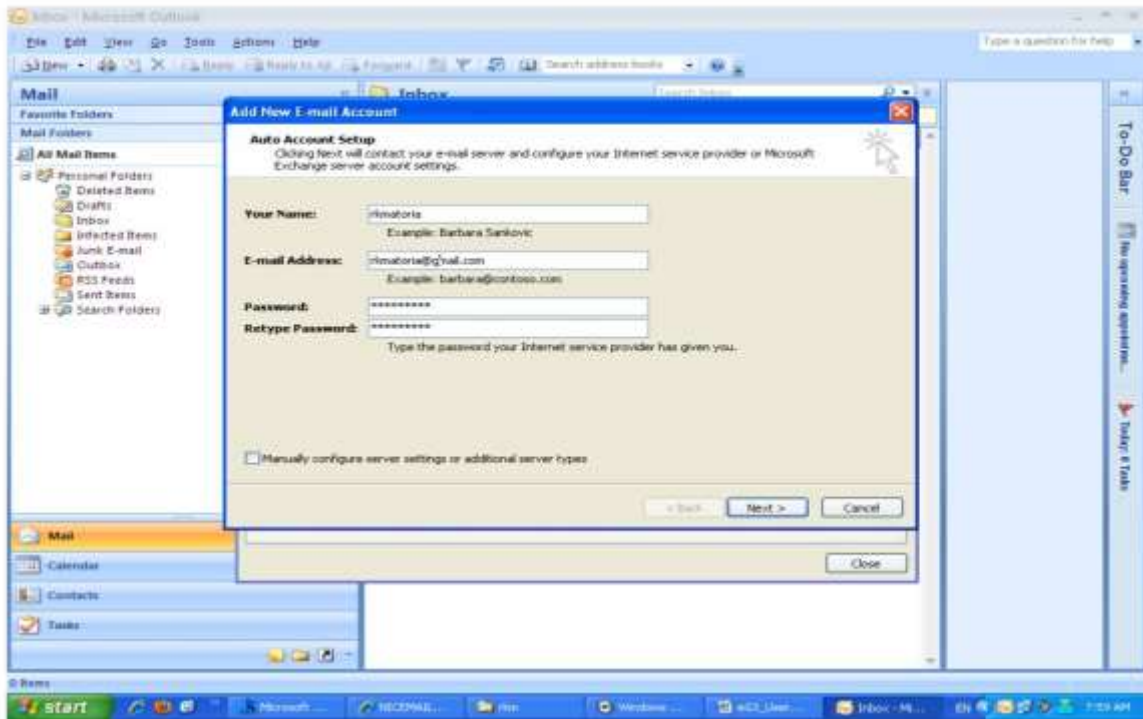
Step 3: Your gmail account will be set automatically..in the last press FINISH button.

NOTE: Now you are ready to send the mail from eG3. However, while sending mail from eG3 you must keep open the Microsoft outlook.
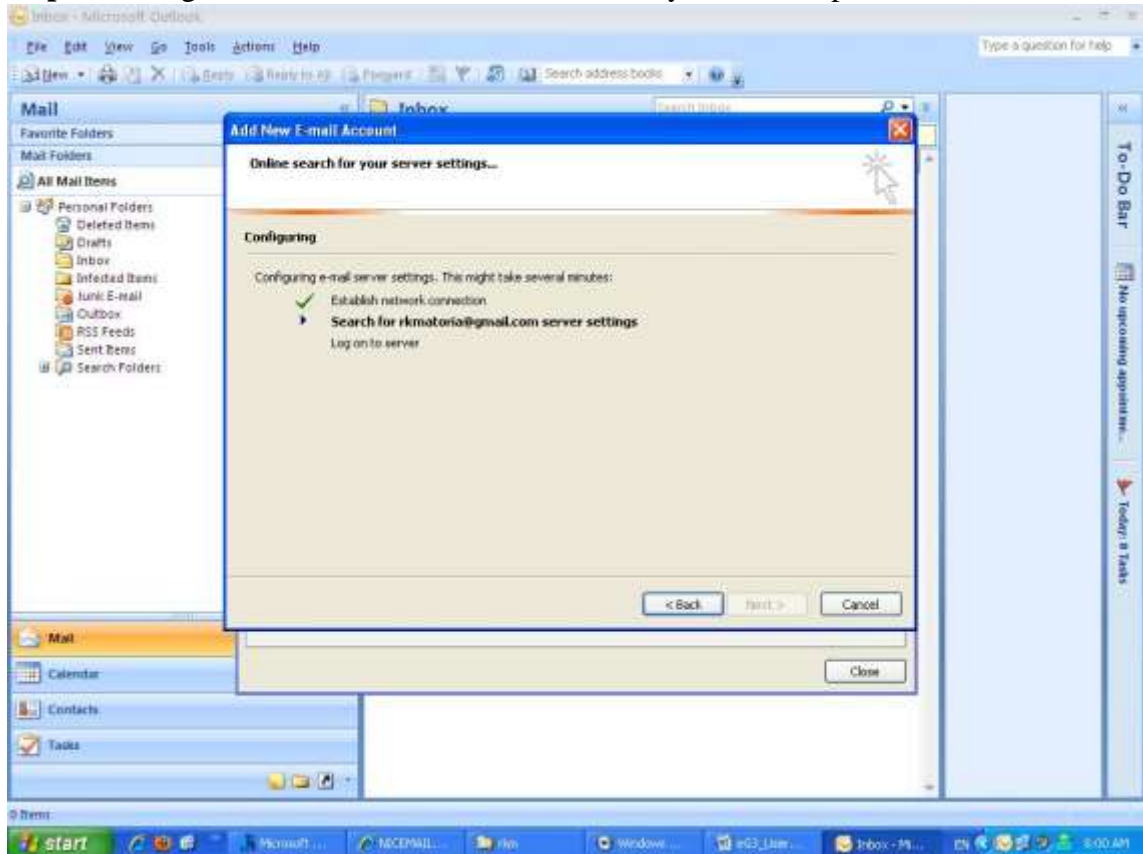
How to Setup Email Account using POP3 Account

In order to send the communications by email, it is needed to set the email account in the Client Desktop using **Microsoft Outlook/ Microsoft Office Outlook**. The email account may belong to a library or librarian, it may be PoP3/SMTP account or some other account like Yahoo, Gmail, etc.

To setup the email account once, run the **Microsoft Outlook** from the Program List and go to the **Tools >> Account Settings**
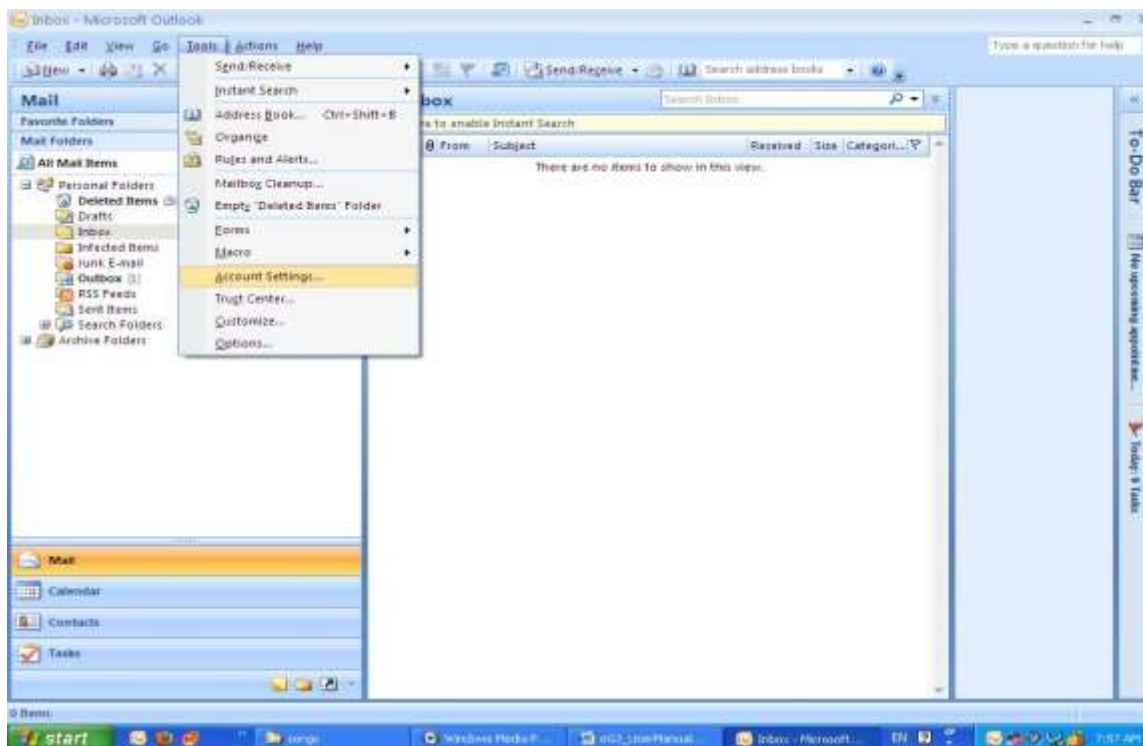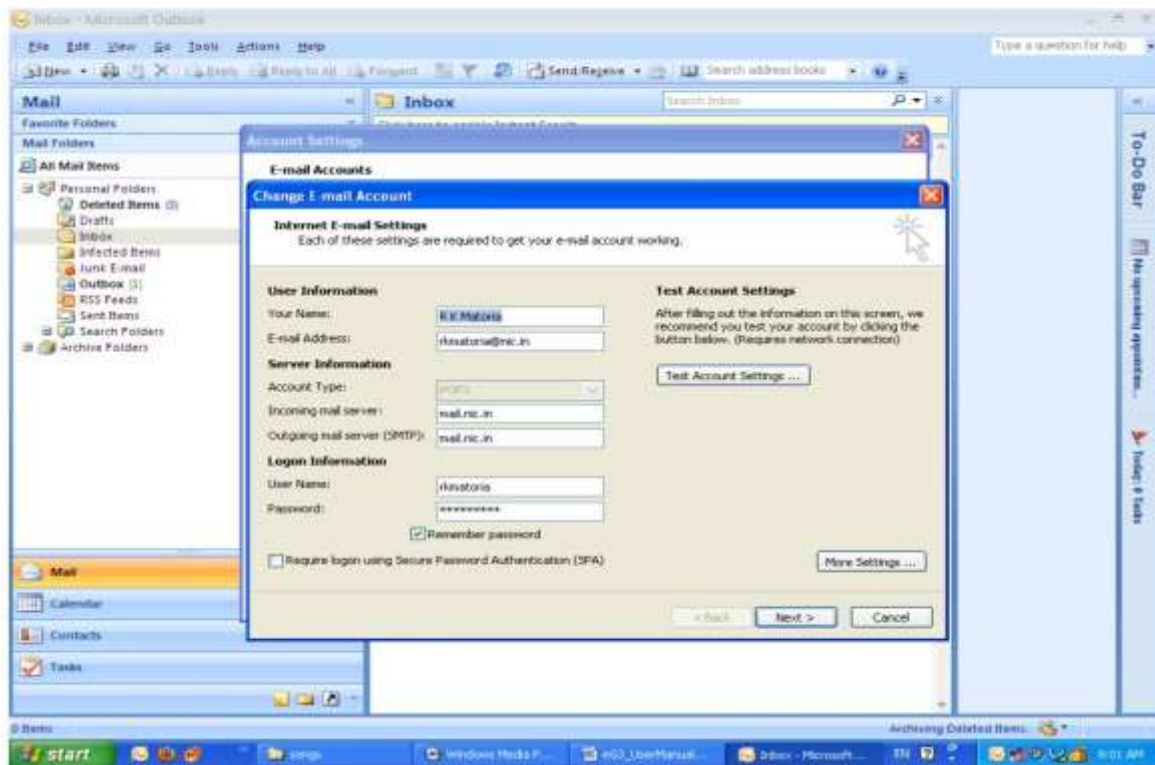
On the above screen, fill up the required info with email details, press the
More Settings..button and fill up more settings there on the below form
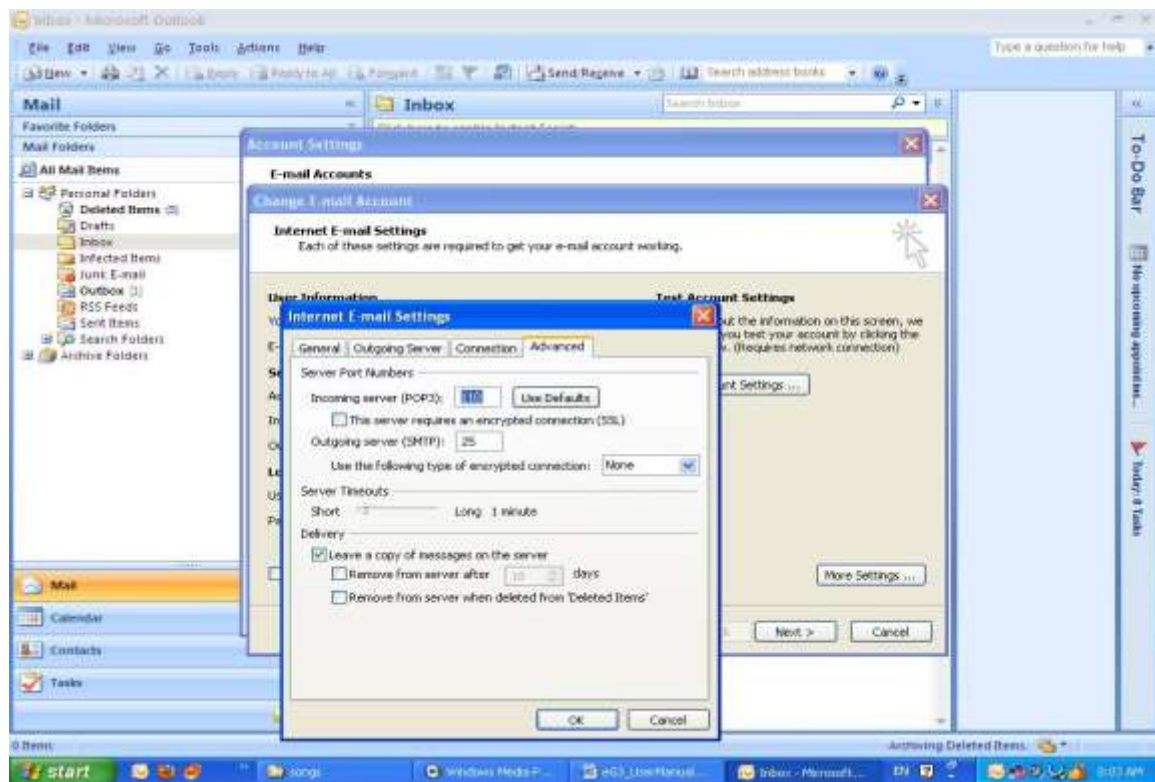
After assigning the correct settings, Press OK button and save all the settings. Now, you are ready to send the email from e-Granthalaya Software.

To check the outgoing email, check the Outbox of the Microsoft Outlook and see if outgoing mail messages are there it means e-Granthalaya is sending mail. If mail messages are not visible in Outbox, just immediately after sending the mail, then check the email settings again and correct the settings.

1.10.   Bar Code Integration

Bar Code Technology is very useful not only in other areas but also in libraries. Bar Codes are used to identify the individual item with its status to do many tasks, like in libraries, barcodes are used for speedy circulation. Barcodes are based on lines/strips printed on the label and pasted on the book.

e-Granthalaya Software provides the integration with Bar Code Technology, generates barcode labels of various kinds/sizes, and reads the barcode labels during issues/return, etc

How to Integrate Bar Code

Barcodes may be generated in two ways :-
1.   On Laser Printer with A4 Sizes sheets with barcode labels pasted over the sheet
2.   On BarCode Printer (Thermal Printer)

1.   How to Generate Bar Codes by Laser Printer

To generate barcodes by laser printer, first you need to install 'Bar Code Fonts' in the Client PC. Two bar code fonts are available in the MANUAL Folder of software CD. Names of the barcode files are – FREEOF9.TTF and FREEOF9x.TTF. These fonts are also available on http://egranthalaya.nic.in for download.

To Install barcode fonts, you must go to control panel >> Fonts >> double click

Go to FILE option and click 'Install New Fonts'


Then browse the font files from the CD or drive and select both the Fonts file, Press OK button to install the fonts

<u>NOTE</u>: In win 7, right click the fonts and choose the option –INSTALL to install the barcode fonts.

After Installation of Fonts, both the fonts become available in the fonts list as shown above, select these newly installed Fonts from the above list and double click, then press DONE button as show n in the below screen.
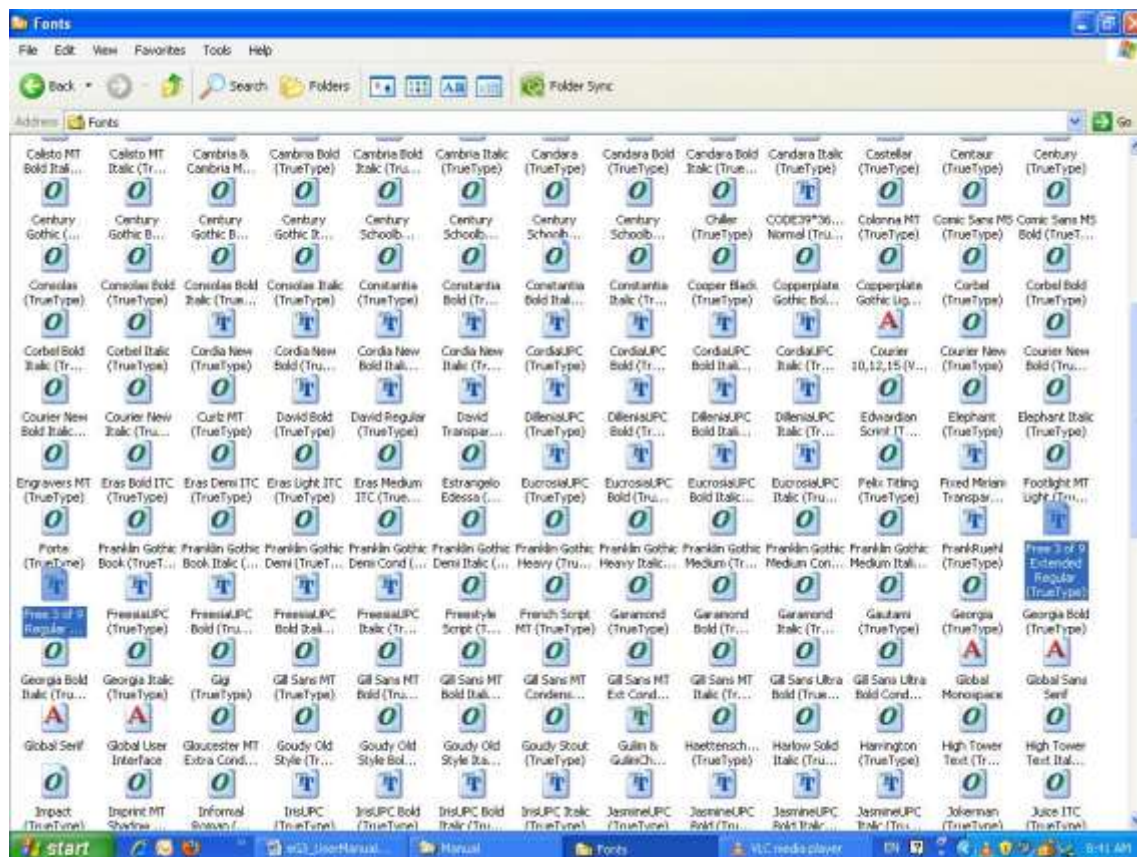
Now you are ready to use the barcode fonts.

NOTE: In case of Win 7 OS, u need to right click the Fonts Files and select the option 'Install' >> it will install the Fonts in the PC.

NOTE: In case, barcode lines are not printed in the labels and *56* kind of labels are printed then re-install the fonts again and reboot the PC.
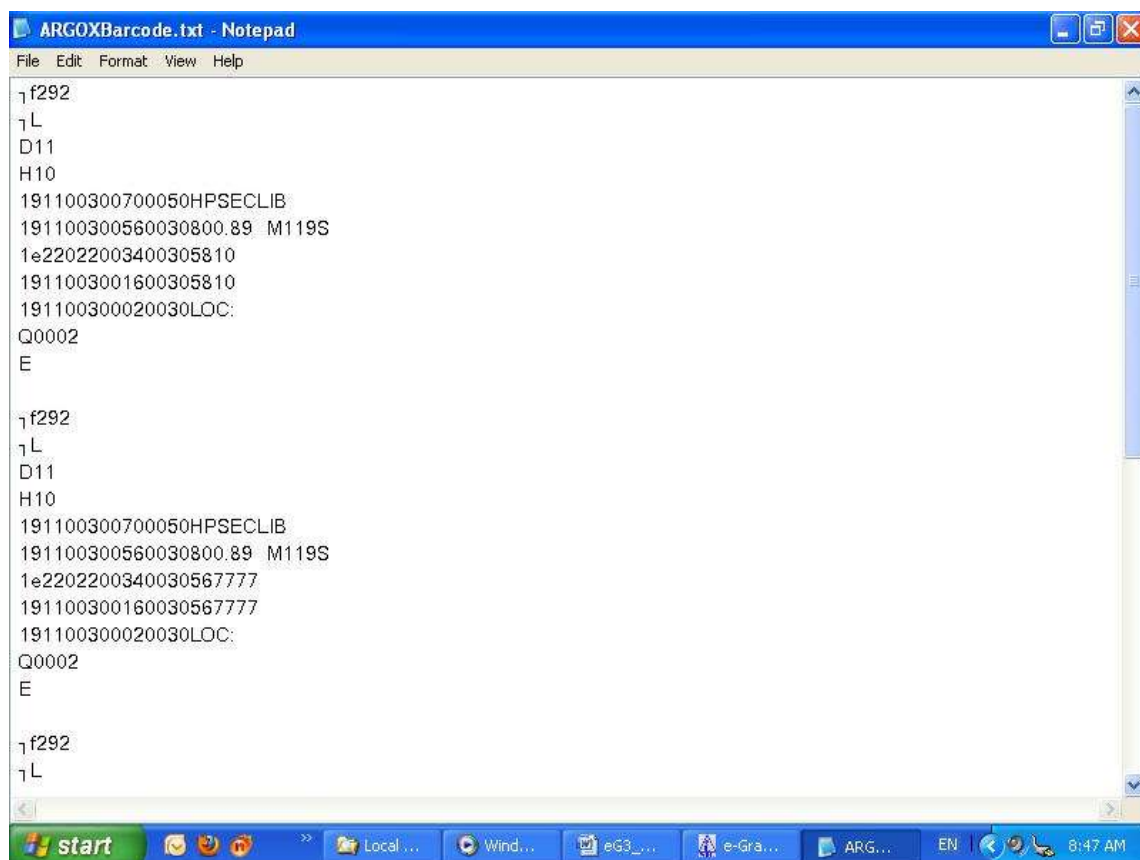
2.   Print Labels with Barcode Printer

BarCode Printer can be integrated with the e-Granthalaya Software by providing us PRN File from the Vendor of the printer. PRN file is nothing but a text file contains the programming codes which are understood/executed by that model/make of printer. While purchasing the BarCode Printer, first get finalize your labels by Vendor using BAR TENDER software or any others. Once finalized, then test it by reading it properly. Once label is final then to create PRN file – on the PRINT screen there is a check box 'PRINT TO THE FILE' option – check it and press PRINT button - it will generate the PRN file as shown below for ARGOX Printer. Now, you can send this

PRN file to us in mail where we will add a new printer in eG3 for you. After this we will compile the software and you need to update your eG3 Client.

NOTE: In case, your Barcode printer is connected with USB Port then you must send us PRN file which was designed/created/tested on USB port only.

NOTE: Already, many barcode printers are integrated with e-Granthalaya, in case you have purchased any of these then user can use the same for generating the barcode labels.

NOTE: Before pasting barcode labels on the books, first make sure that these barcode labels are well readable from barcode reader and test these in e-Granthalaya Circulation Module.

PRN File of ARGOX Barcode printer

BarCode Printer on USB Port:

> In case your barcode printer is connected on USB Port then you need to do 'Spooling' of the printer in your PC where you wish to print the labels. For spooling, first install Barcode Printer Driver from CD which was supplied by Barcode Vendor. Once driver is installed, an icon of your barcode printer will be created under 'Printer and Fax Device' of Windows. Make your barcode printer as 'Default Printer' by right clicking it pressing 'default printer' option..

To do spooling, right click the barcode printer icon and go to 'Printer Properties' – a new windows will appear. Go to PORT Tab and in the bottom of the screen put the check box on option 'Enable Spooling' then select LPT1 as well as USB port on which printer is attached. Then press APPLY button to save the settings. During this process, your barcode printer must be connected with your pc and must be On. Now, printer is ready to get print command from e-Granthalaya.

1.11. RFID Integration

RFID is the latest technology being used in libraries for circulation and other purposes. RFID, generally, can be integrated with ILMS in three ways:-
a). SIP Interface in ILMS – in eG3 this protocol has not been added so far
b). API from Vendor – this can be done once we get the API from Vendor of RFID
c). Integration at back end database of eG3 – In this case, RFID vendor will not use Circulation Module of eG3, instead vendor will use its GUI for issue/return- given below

In order to integrate RFID with e-Granthalaya, RFID Vendor needs to create a **TAGS** field in the Tables of e-Granthalaya database – **HOLDINGS, MEMBERSHIPS** and **LOOSE_ISSUES_COPIES** to store the TAGS value.

Tables Used with RFID

Table: **HOLDINGS**: Where HOLD_ID (PK) and ACCESSION_NO are stored. (In this table Books and Bound Volumes are stored)
Table: **MEMBERSHIPS**: Where MEM_ID (PK) and MEM_NO are stored.
Table: **LOOSE_ISSUES_COPIES**: Where COPY_ID (PK) and other fields of Loose Issues of the Journals are stored.
Table: **CIRCULATION**: Where all records are saved under circulation transactions on Issue/Return

Display of Records
While issuing the document, it is essential to display the details of the document in the circulation form of RFID UI. RFID UI will read the TAG of the document and will pickup corresponding ACCESSION NO (for Books and Bound volumes) from HOLDINGS Table or COPY ID (for loose issues) from LOOSE_ISSUES_COPIES Table. Other details of the documents can be get from 'BOOKS_ACC_REGISTER_VIEW' or 'HOLDINGS_CATS_AUTHORS_VIEW' based on corresponding HOLD_ID/ACCESSION_NO (for books and bound vol). In case of Loose Issue, get the other details from CATS_LOOSE_ISSUES_COPIES_NEWVIEW' view by sending corresponding COPY_ID.

Similarly, corresponding MEM_ID, MEM_NO can be picked up from MEMBERSHIPS Table by reading the RFID TAG of the member. Other details of the members can be get from members_view under VIEW in database.

Issue of Books and Bound Volume of Journal

While issuing the Books and Bound Volume of the journal, RFID UI will read the TAGS Value of the document and will get corresponding HOLD_ID and ACCESSION_NO from the table HOLDINGS and other details of the document can be get from '**Holdings_Cats_Authors_View'** for display in the circulation form as suggested in the above paragraph. Once transactions is processed, following tables will be updated:

1. On successful ISSUE of a document, A New Record of the transaction is saved in CIRCULATION Table with corresponding HOLD_ID (Books and Bound volume of Journals) with the following fields

   CIR_ID: Auto Generated
   MEM_ID: Save Corresponding MEM_ID
   HOLD_ID: save corresponding
   HOLD_ID ISSUE_DATE: Current Date
   ISSUE_TIME: Current Time
   DUE_DATE: Calculated based on the DUE_DAYS of the corresponding
           MEMBER from DESIGNATIONS Table or
           'MEMB_GROUP_DESIG_SUB_VIEW'
   STATUS: 'Issued' (Hard Coded, case sensitive)
   DATE_ADDED: current Date
   USER_CODE: Who logon the software
   REMARKS:
   DELETED: N
   LIB_CODE: Library Code which Logon the software

2. Corresponding Record of HOLD_ID in HOLDINGS Table will be updated with the value '2' in STA_CODE Field. Value '2' denotes that the document is Issued.

Issue of Loose Issues of Journals

1. While Issue of Loose Issues of journals, RFID UI will read the value of the TAGS pasted on the loose issue and will get the corresponding COPY_ID from LOOSE_ISSUES_COPIES Table and other details from CATS_LOOSE_ISSUES_COPIES_NEWVIEW for display of the full details of the loose issue in the circulation form. On Issue-

2. A New Record of the transaction is saved in CIRCULATION Table with corresponding COPY_ID of the loose issue of Journal along with the following fields

   CIR_ID: Auto Generated
   MEM_ID: Save   Corresponding
   MEM_ID COPY_ID: save COPY_ID

ISSUE_DATE: Current Date
ISSUE_TIME: Current Time
DUE_DATE: Calculated based on the DUE_DAYS of the
        corresponding MEMBER from DESIGNATIONS Table or
        'MEMB_GROUP_DESIG_SUB_VIEW'
STATUS: 'Issued' (Hard Coded, case sensitive)
DATE_ADDED: current Date
USER_CODE: Who logon the software
REMARKS:
DELETED: N
LIB_CODE: Library Code which Logon the software

3. Corresponding Record of COPY_ID in LOOSE_ISSUES_COPIES Table will be updated with the value '2' in STA_CODE Field. Value '2' denotes that the issue is Issued.

Return of the Documents

For return, once you put the book in RFID platform, it will read the TAG of the book…then RFID UI needs to get corresponding HOLD_ID (for books, etc) from HOLDINGS Table and other details from
'BOOKS_ACC_REGISTER_VIEW' or
'HOLDINGS_CATS_AUTHORS_VIEW for display of the book details.
Similarly, for loose issue, get the corresponding COPY_ID from
LOOSE_ISSUES_COPIES Table and full details form
CATS_LOOSE_ISSUES_COPIES_NEWVIEW' for display purpose.
On pressing RETURN Button, following table will be updated:

CIRCULATION Table –CIR_ID Record must be identified and update
the following fields:

RETURN_DATE: Current Date
RETURN_TIME Current
Time FINE_DUE: If any
FINE_COLLECTED: If any
STATUS: 'Returned'
Also, update record of corresponding HOLD_ID in HOLDINGS Table
with STA_CODE = '1' (In case of Books and Bound Volume of Journals)

Similarly, in case of Loose Issues, update the corresponding COPY_ID in
the LOOSE_ISSUES_COPIES Table with STA_CODE ='1'

For RESERVE and RENEW, Only following Fields are needed to update
in CIRCULATION Table:

STATUS: no change

RENEW_DATE: Current Date (In case of RENEW)
RESERVE_DATE: Current Date (In case of RESERVE)
DUE_DATE: New due date calculated from current date by adding
       DUE_DAYS from MEMBERSHIPS record in already calculated due
       date)

1.12.   SMS Integration

SMS is the new way of sending messages for various purposes. However, in library software, there are very few uses of sms, still can be used to send many kinds of messages to the users. These messages may be sent on issue, return, over-due, new arrivals and many more.

e-Granthalaya is well integrated now with sms technology. To use the sms with e-Granthalaya, you need to have a SMS account from any SMS Service provider. The account consists of the following components:
a). User Code b). Sender Code, c), Password and d).Service Identifier.

How to integrate with eG3

To integrate the SMS account with eg3, you open the 'Data Connection Form' from ADMIN >> Database Utilities >> Change Database connection. On this form, SAVE the above mentioned parameter.

How to send SMS

At present sms message can be sent in eg3 on Issue and Return of books in circulation module. For sending the message, you need to select/put check box in SMS Message option. Once you will Issue or Return documents, sms message will go to the member mobile no.. However, as you know that MOBILE No must be there in Member profile. Later, other sms based options will be provided in eG3.

1.13.   Smart Card Integration

Smart Card is a kind of Identity Card, generally made of plastic, and stores member personal data in chip. Such cards are costly, however, provided in many organizations to the staff. Smart card can be used in eG3 for ISSUE of the books. For using smart card, select the Option 'Smart Card' on ISSUE-RESERVE Form and swap the card in card reader. Smart card is the replacement of member card in libraries. However, the Member Number in the library database and Member No on smart card must the same.

☐ First create a field TAG_NO, VARCHAR Type, Length= 200 Characters in the MEMBERSHIPS Table.

□ Then enter your smart card no of members in the his/her record in the MEMBERSHIPS Table directly by opening it in database.

1.14. When You Forgot Password

Many times you can forget your password of the software and thus you can not login the software. In this situation, you can get your password from the database (GRANTH3 or whatever name) where all records are exist in relevant Tables.

Steps:-
1. Run the Microsoft SQL Server Management Studio from All Programs >> Microsoft SQL Server 2005 >> SQL Server Management Studio
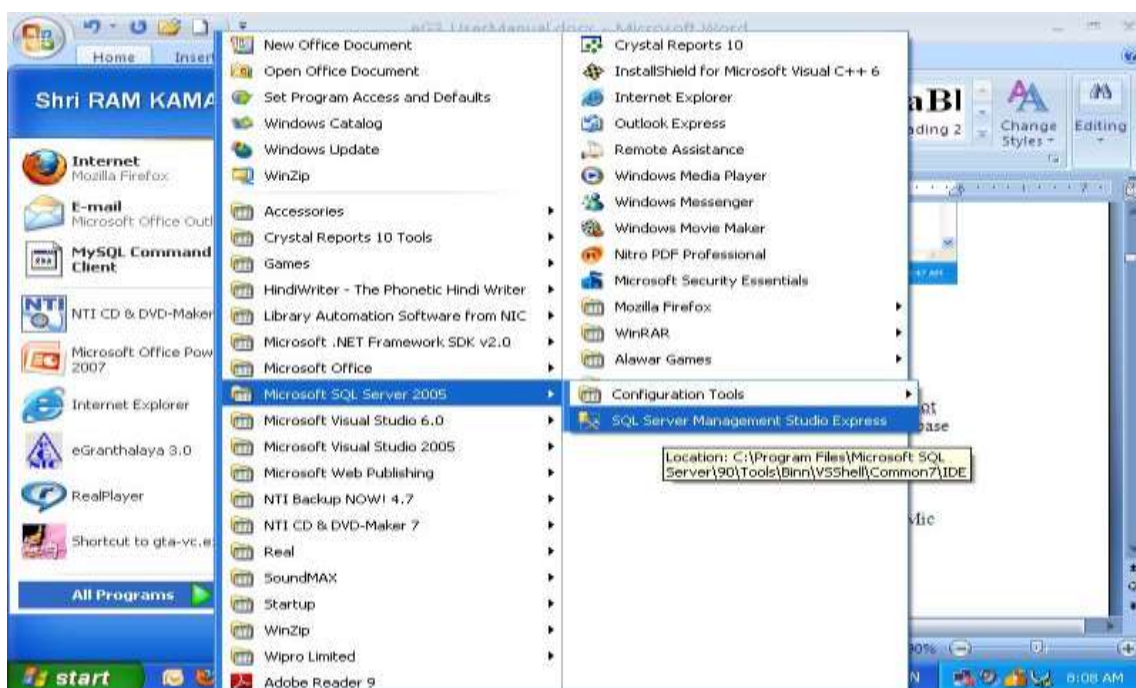
2. On Click the above screen, a small Windows will appear. Then press the CONNECT button. In case, it is Win Vista/7/Server 2008 then u will need to select SQL Server Mode and you need to give Database Login or 'sa' and its password. In case, you have installed SQL Server 2005 from e-Granthqalaya CD automatic setup..then sa password is given in the root of the e-Granthalaya CD.

3. After pressing CONNECT Button, you will be taken to new windows where click the +
   sign of databases to expand it..then press + sign of your database (GRANTH3)
   ..then press + sign of Tables..here you will see all the tables of GRANTH3 database
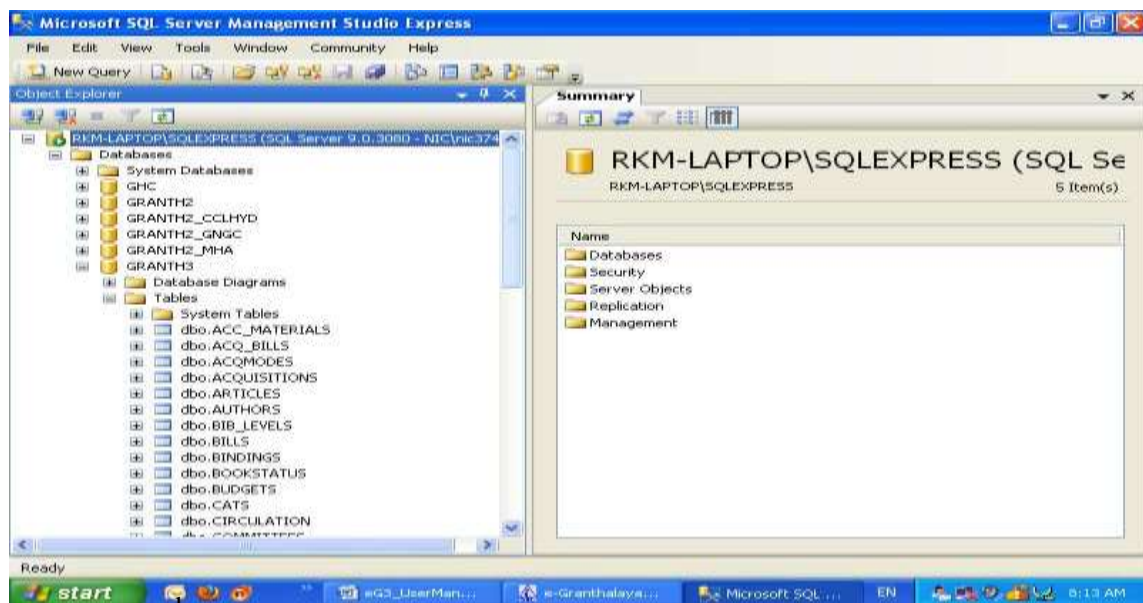
4. Go to 2nd last Table (USERS) and right click it >> Open Tables. The Records will
   be shown in the table from where you can note down the Password of your users.
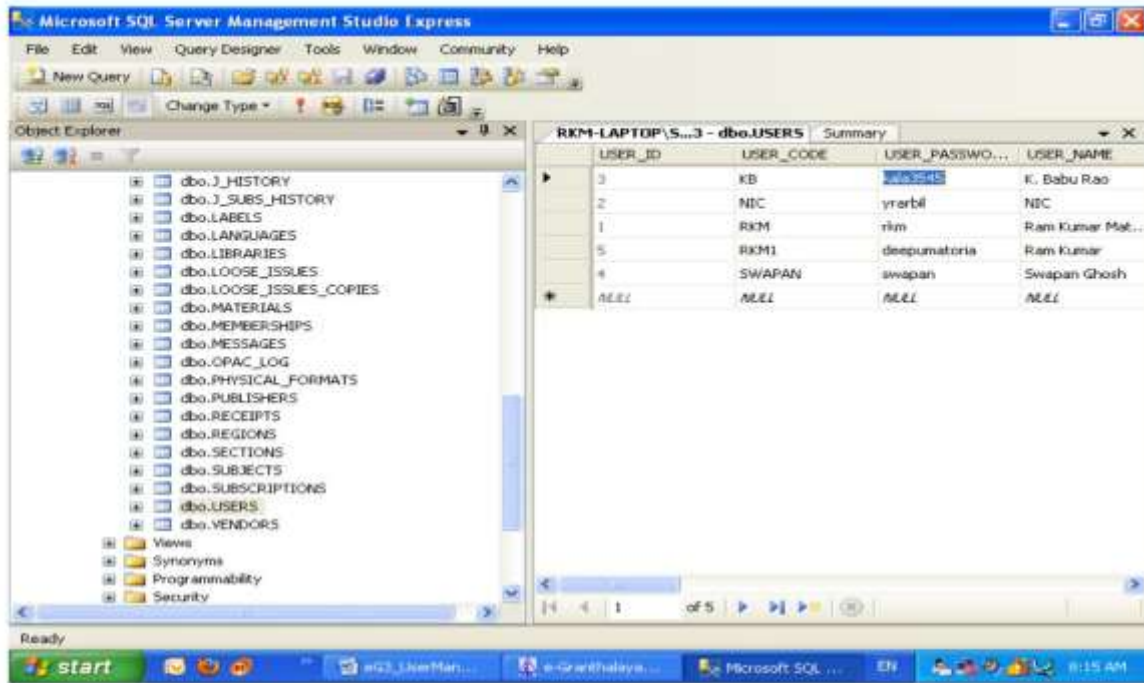
Chapter 2
How to Start the Program

2.1. After successful installation of the **e-Granthalaya** software, user can run the program by choosing the program shortcut available under the "**Programs >> National Informatics Centre >> eGranthalaya 3.0**", as given below:
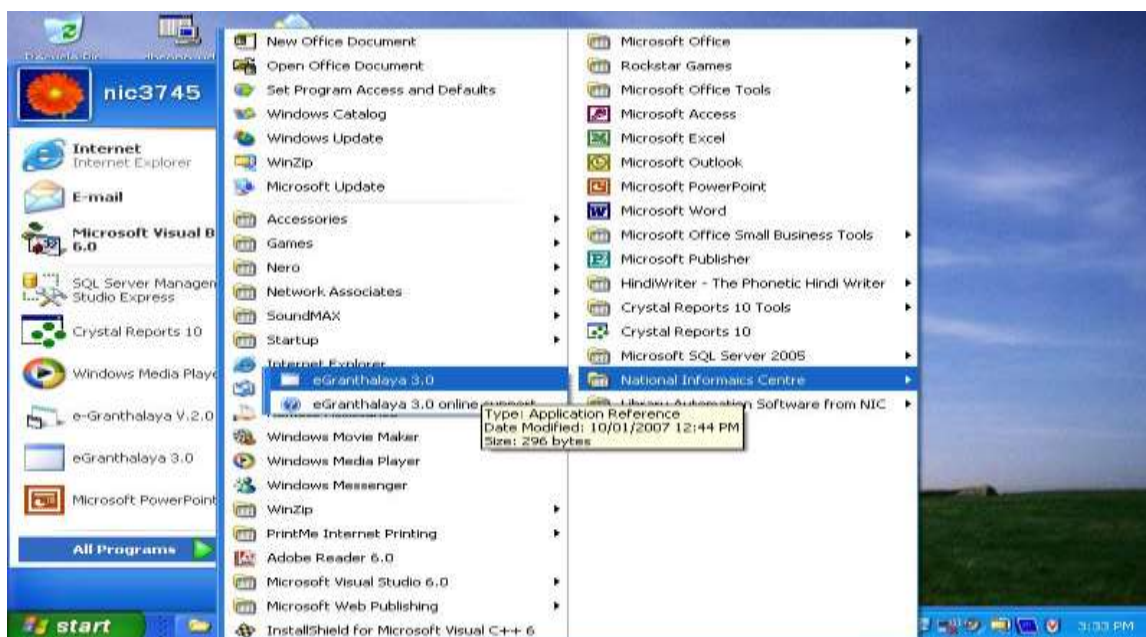
2.2. Once you click the "**e-Granthalaya 3.0**" shortcut, the program gets started and first screen appears as given below:
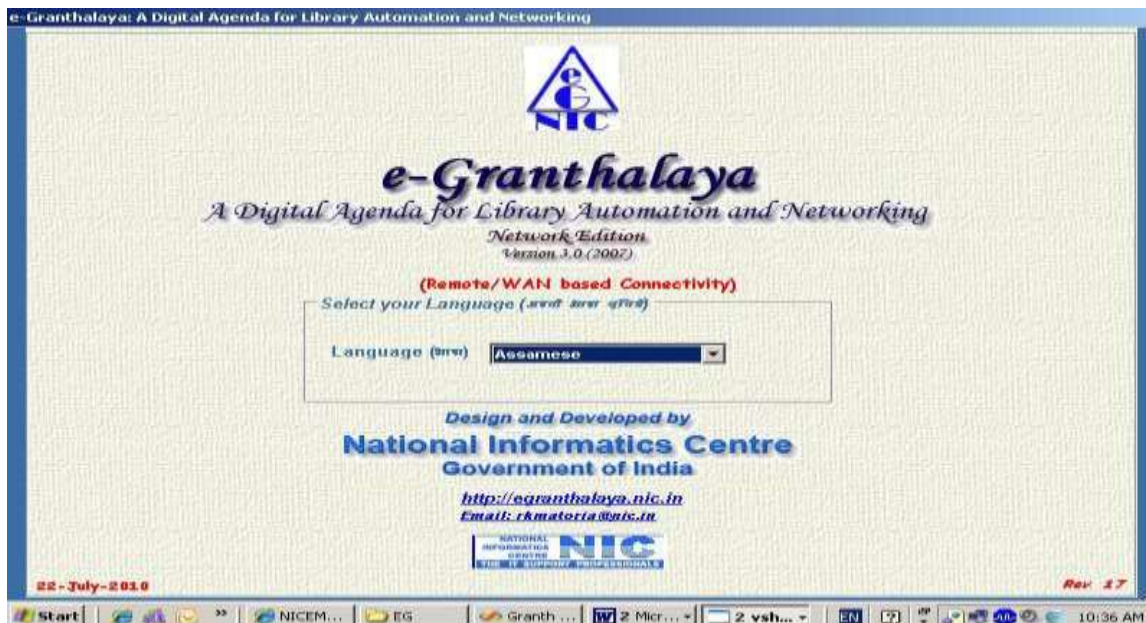
2.3. From the drop–down menu (tiny arrow) in the above screen, select the **Language** in which you want to display the labels on the form

<u>NOTE</u>: To display the labels in the local language like Hindi, you must install the "Language pack' in the server pc/client PCs
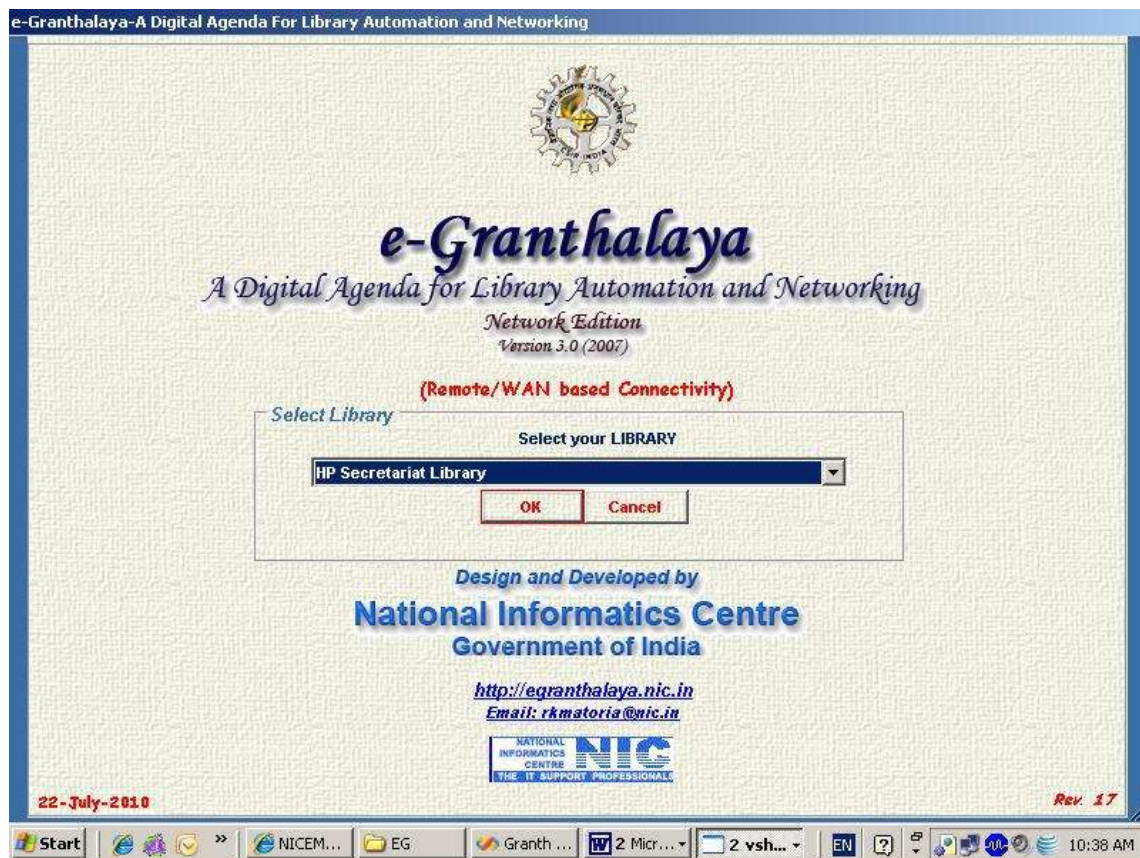
2.4. From the drop-down (tiny arrow) in the above screen, select the **name of the library** by clicking it, next screen will appear.

> <u>NOTE:</u> In case it is a new database and you are first time connecting the e-Granthalaya then "Add New Library" button will appear. By pressing this button, you will add one Library Record by pressing the Add New Button on the following screen

2.5. From the Drop-Down, select the User Code and enter Password to access the Program Modules and Menu. In case it is a new database and you are first time connecting the e-Granthalaya then "Add New User" button will appear. By pressing this button, you will add First User Record and will SAVE it..then EXIT the Form

2.6. Select the **user code** from the drop-down and type the **Password** and press OK button or **press ENTER** key on the keyboard.Then you will receive the message "*Welcome to e-Granthalaya*" and all modules will become available to the users for data entry, as shown in the below screen:
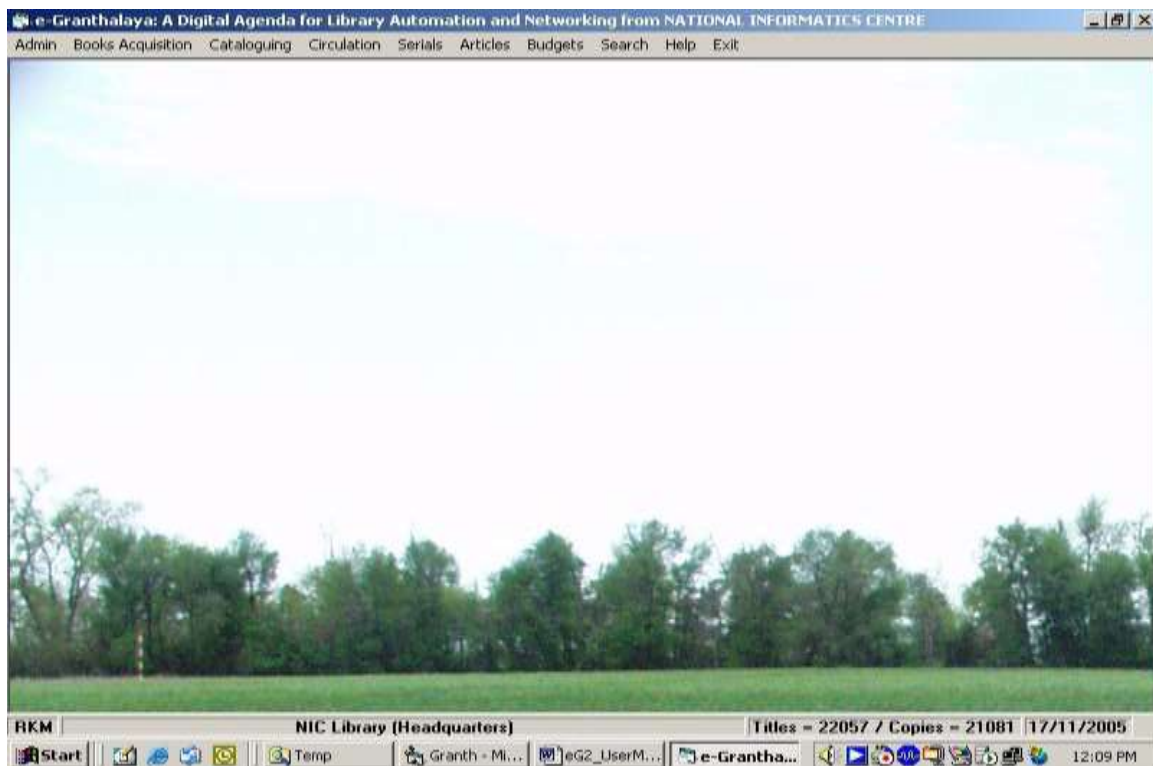
NOTE: System administrator / library in-Charge can set the module wise permission for each and every users using the **USER** menu under Admin > Master data >>Add Users

Chapter 3
Admin Module

"**Admin**" module is used for making users, setting their permissions, making entry of the default values in the master tables and then using such values in the subsequent modules. This module contains the following menu and sub menu:-

3.1. System Data (Data must not be deleted / modified)

3.1.1. Bibliographic Level (Table: BIB_LEVELS) –
This Form is used to add / edit / delete Bibliographic Levels (A first Level Categorization of Reading materials in a library). However, users are advised not to add / delete any existing record from this table. In case you want to add more documents Types then add in DOCUMENTS TYPES form. As per international standard there are two bibliographic levels for printed materials in the libraries: *M= Monographs* and books and *S= Serials*

NOTE: You can not ADD NEW type Bibliographic Level.

3.1.1. Materials Type (Table: MATERIALS) –

This form is used to Add/Edit/Delete Materials Types (A Second Level Categorization of Reading materials in a library). Users are advised not to Delete / Modify any existing

record. The Materials Types already available have been added to represent the documents in a library as per international standard. In case, you wish to add new materials type then press ADD NEW button and type the data and SAVE Record.
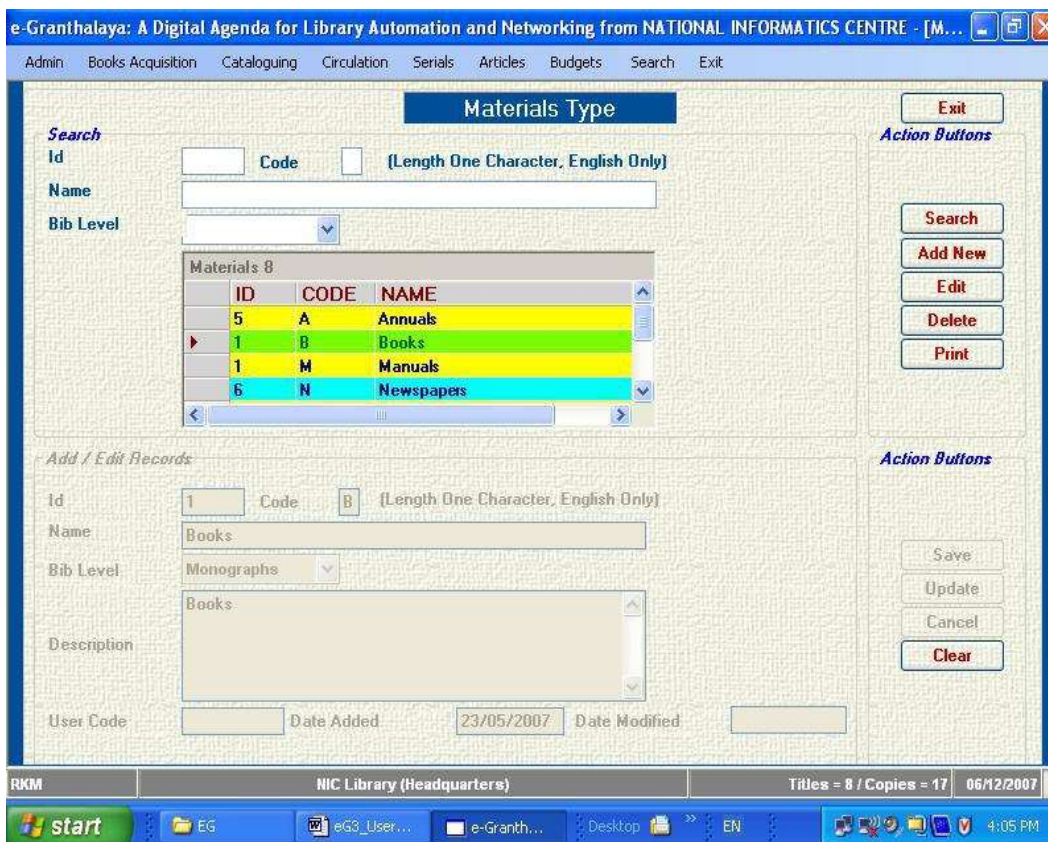
3.1.2. Document Types (Table: DOC_TYPES) –

This Form is used to Add / Edit / Delete Document Type in a library – a third level of categorization in the library. Here Users can **add new documents** types (if not exists) by pressing **ADD NEW** button. Existing Records must not be deleted / edited. Following Table shows Types of Bibliographic Level, Materials Types and Documents Types already available in the database. Users are advised not to delete / modify these types.

S.N.	BIB_LEVEL	MATERIALS	CODE	DOC TYPE
1.	M	B (Books)	BK	General Books
2.	M	B (Books)	AM	Almanacs
3.	M	B (Books)	BB	Bibliographies
4.	M	B (Books)	CB	Composite Books
5.	M	B (Books)	CP	Conference Proceeding
6.	M	B (Books)	DT	Dictionaries
7.	M	B (Books)	DR	Directories
8.	M	B (Books)	EB	Edited Books

9.	M	B (Books)	EN	Encyclopedias
10.	M	B (Books)	GB	General Books
11.	M	B (Books)	GP	Govt Publications
12.	M	B (Books)	HB	Hand Books
13.	M	B (Books)	MV	Multi-Volume
14.	M	B (Books)	TH	Thesaurus
15.	M	B (Books)	YB	Year book
16.	M	B (Books)	TB	Text Books
17.	M	B (Books)	BA	Bare Acts
18.	M	E (Patents)	PE	Patents
19.	M	M (Manuals)	MN	Manuals
20.	M	S (Standards)	ST	Standards
21.	M	T (Reports)	GR	General Reports
22.	M	T (Reports)	TR	Technical Reports
23.	M	T (Reports)	DS	Dissertations
24.	M	T (Reports)	TS	Theses
25.	M	T (Reports)	LR	Law Reports
26.	M	T(Reports)	CR	Commission Reports
27.	S	A (Annuals)	AR	Annual Reports
28.	S	A (Annuals)	AN	Annuals
29.	S	N (Newspapers)	NL	Newsletters
30.	S	N (Newspapers)	NP	Newspapers
31.	S	P (Periodicals)	AI	Abstracting/Indexing Services
32.	S	P (Periodicals)	JR	Journals
33.	S	P (Periodicals)	MG	Magazines
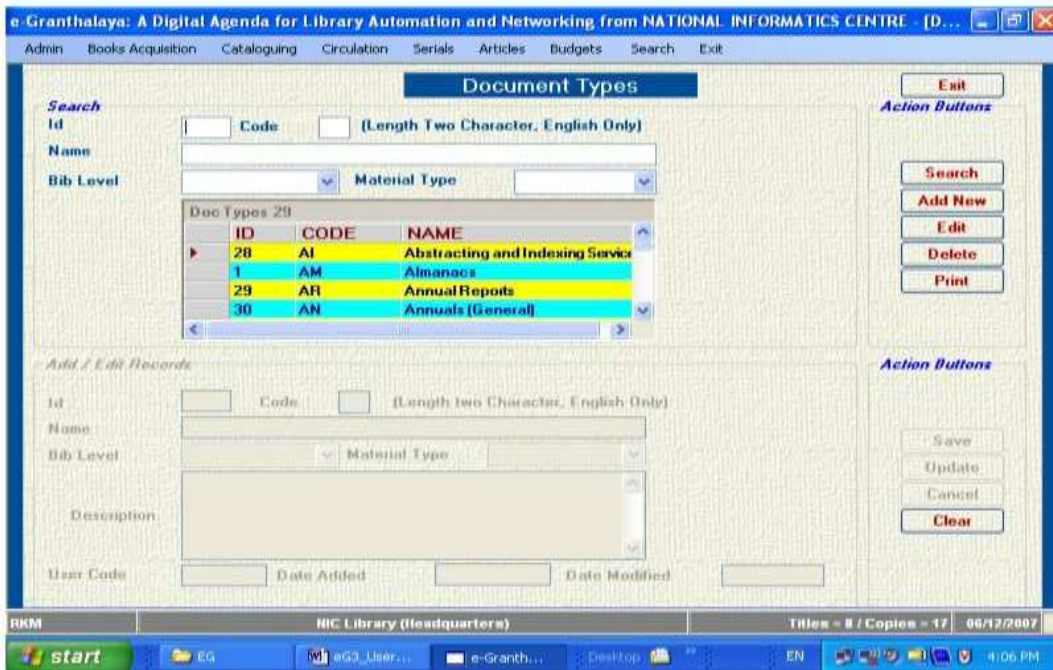
3.1.3. Acquisition Modes (Table: ACQMODES) –

This form is used to Add / Edit / Delete Acquisition Modes in a Library. Do not delete/modify the following records available in the software:

E	=	Exchange
G	=	Gratis / Gift
P	=	Purchased (for books)
S	=	Subscribed (for periodicals)
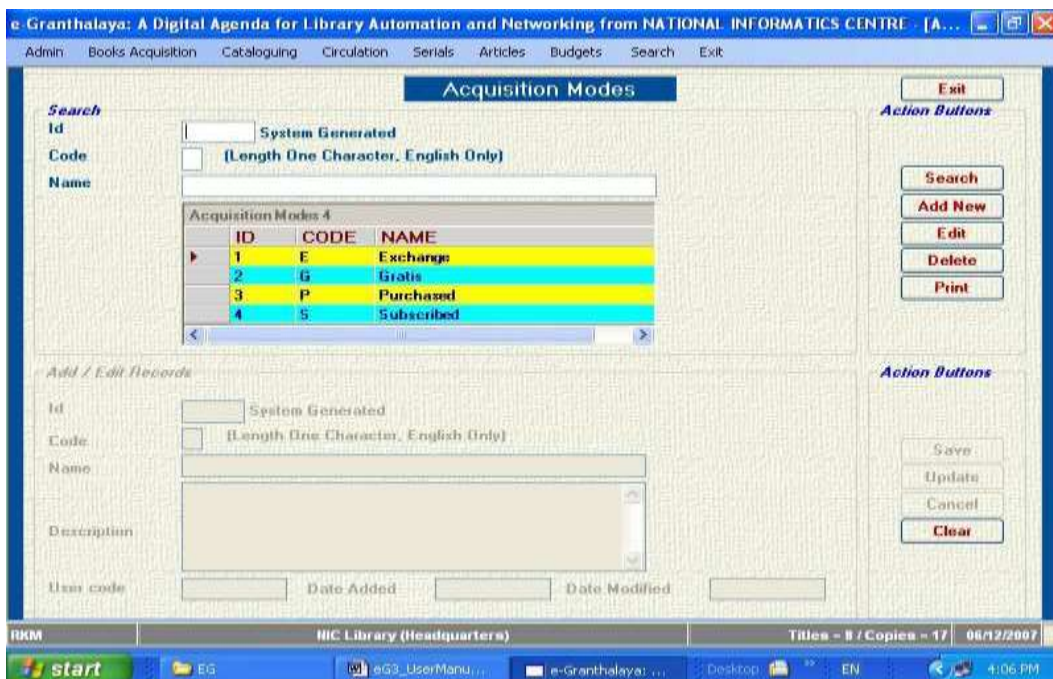
3.1.4. Currency Codes (Table: CURRENCIES) –

This form is used to manage the Currency Codes which will be used in Books Acquisition and Budget Modules to process the Bills. New Currency Codes must be added as per the **ISO: 4217** available in the CD of the e-Granthalaya Software / or can be downloaded from Internet. Users are advised not to delete / modify the existing records. To add new currency record press **ADD NEW** button and type the data and press **SAVE** the record. To edit / modify the record, click the record from DataGrid to display and press **EDIT** button. After edit press **UPDATE** to save the changes.
Mandatory Fields: Currency CODE (3 digits as per ISO: 4217) and NAME of Currency

Buttons		*Actions*
ADD NEW	-	add new Record
DELETE	-	delete the existing record
EDIT	-	Edit / Change the existing record
PRINT	-	Print the existing Record
SEARCH	-	To search the existing record
Mandatory Fields:-		
CODE	:	3 Character Length, Alpha-numeric
NAME	:	Name of Currency
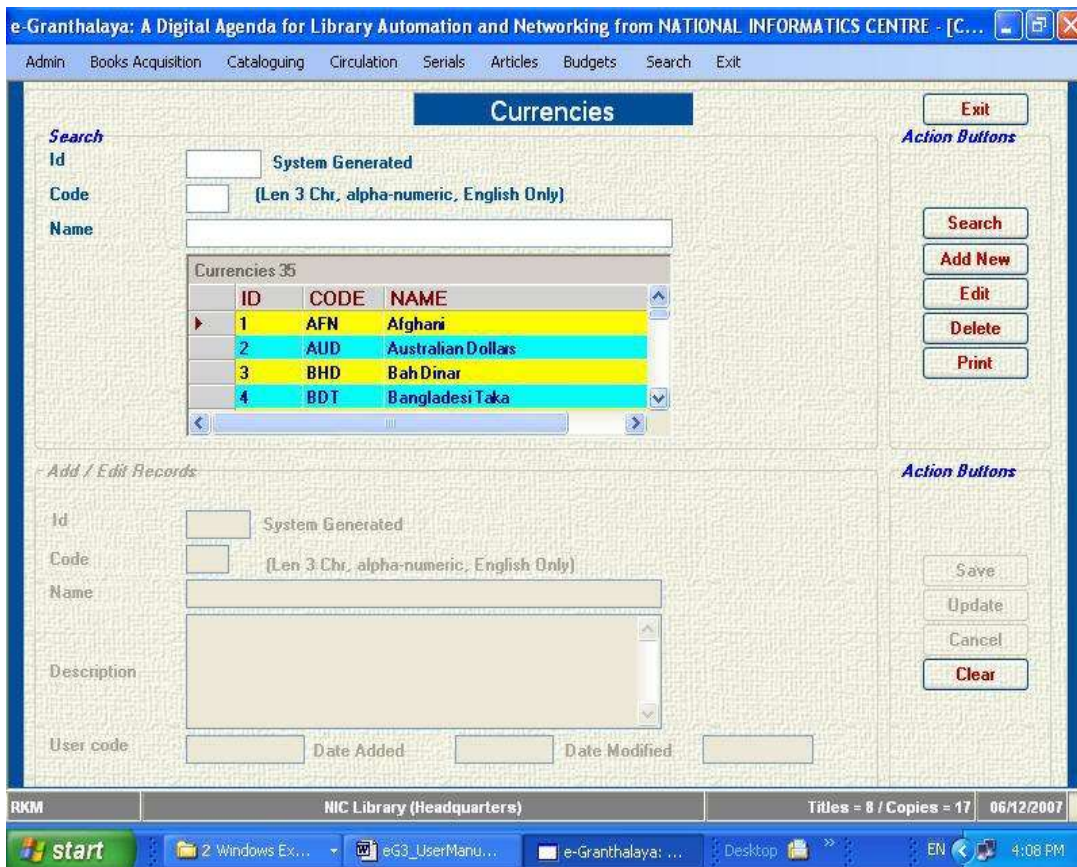
3.1.5. Countries (Table: COUNTRIES) –

This form is used to add the **Names of the Countries** to be used for the books published. More country codes can be added as per the ISO: 3166 with 3 –digits country codes. The ISO: 3166 is available in the CD / Internet. Users are advised not to delete/modify the existing records.

Buttons		*Actions*
ADD NEW	-	add new Record
DELETE	-	delete the existing record
EDIT	-	Edit / Change the existing record
PRINT	-	Print the existing Record
SEARCH	-	To search the existing record

Mandatory Fields:-

CODE	:	3 Character Length, Alpha-numeric
NAME	:	Name of Country

3.1.6. Copy Status (Table: BOOKSTATUS) –

This form is used to Add / Edit / Delete Type of Copy Status in a Library. There is no International standard to represent the copy status so users can add their own status. However, possible status are already added in the database. *Users are advised not to delete/modify the existing status.*

Buttons   ***Actions***
ADD NEW   -   add new Record
DELETE   -   delete the existing record
EDIT   -   Edit / Change the existing record
PRINT   -   Print the existing Record
SEARCH   -   To search the existing record based on the
                    fields available on the screen

Mandatory Fields:-
CODE   :   3 Character Length, Alpha-numeric
NAME   :   Name of the Status
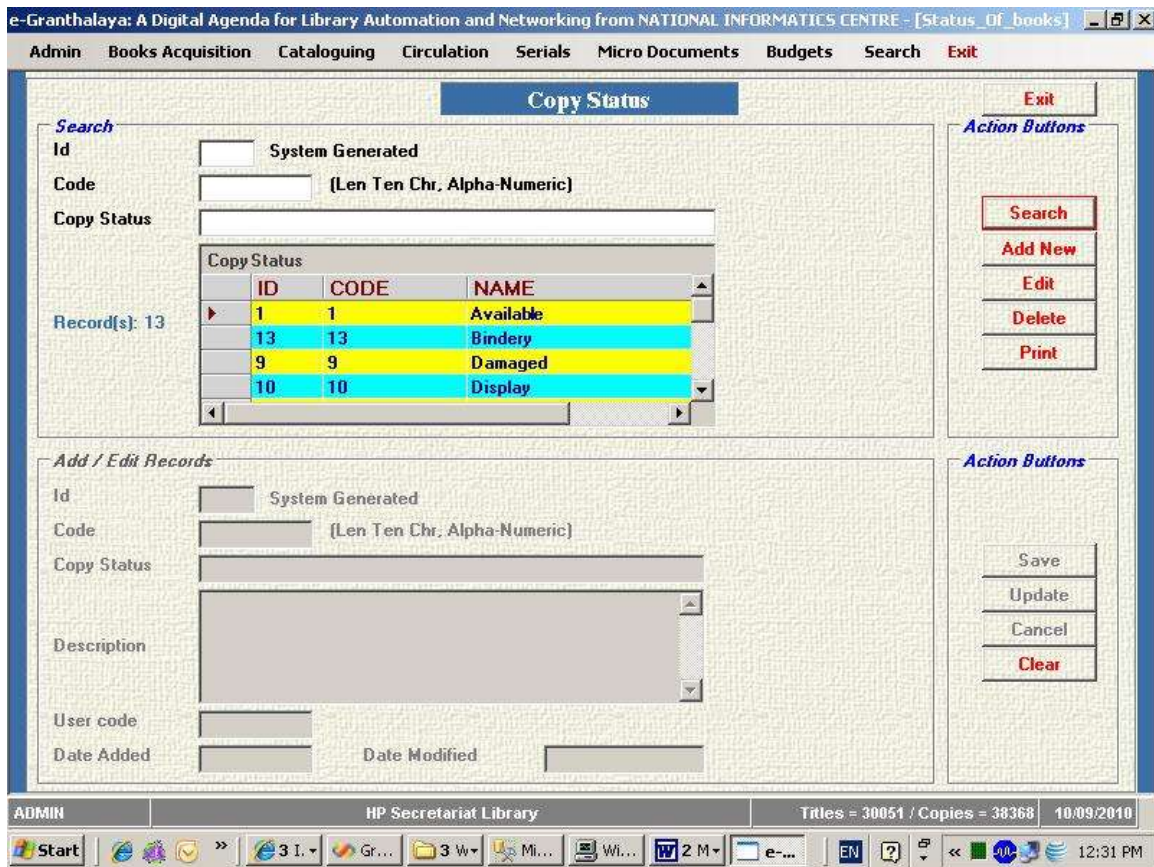
3.1.7. Frequencies (Table: FREQUENCIES) –

This form is used to Add/Edit/Delete the journals frequencies which are used in the SERIALS module of the software. There is no international standard to represent the frequencies so users can add with their codes, etc. However, we have already added the frequencies and users are advised not to modify and delete the existing records.

Buttons   ***Actions***
ADD NEW -   add new Record
DELETE   -   delete the existing record
EDIT   -   Edit / Change the existing record

PRINT   -   Print the existing Record
SEARCH   -   To search the existing record based on the
fields available on the screen

Mandatory Fields:-
CODE   :   2 Character Length, Alpha-numeric
NAME   :   Name of the Frequency

3.1.8. Language Codes (Table: LANGUAGES) –

This Form is used to Add/Edit/Delete the International Language Codes as per ISO: 639
with 3 digits codes. Users can add codes for more languages as per ISO: 639 – available
in the CD / Internet. The language codes are used during cataloging to select the
language of the documents.

Buttons		*Actions*
ADD NEW	-	add new Record
DELETE	-	delete the existing record
EDIT	-	Edit / Change the existing record
PRINT	-	Print the existing Record
SEARCH	-	To search the existing record

Mandatory Fields:-

CODE   :   3 Character Length, Alpha-numeric
NAME   :   Name of the Language

3.1.9.   Accompanying Materials (Table: ACC_MATERIALS) –

This Form is used to manage the Accompanying Materials sometimes used to come with the books like CD, etc. There is no international Standard to represent the codes of such materials so users can add their own codes, however, users are advised not to modify and delete the existing records.

Buttons		*Actions*
SEARCH	-	To search the existing record
ADD NEW	-	add new Record
DELETE	-	delete the existing record
EDIT	-	Edit / Change the existing record
PRINT	-	Print the existing Record

Mandatory Fields:-

CODE: 10 Character Length, Alpha-numeric
NAME :   Name of the materials come along with Books

3.1.10. Type of Binding (Table: BINDINGS) -

This form is used to add Type of Binding. Already we have included many types of Binding found common in the library. There is no international standard to represent the binding by a code, so users can add their own codes. However, users are advised not to delete/edit the existing records.

Buttons		*Actions*
SEARCH	-	To search the existing record
ADD NEW	-	add new Record
DELETE	-	delete the existing record
EDIT	-	Edit / Change the existing record
PRINT	-	Print the existing Record

Mandatory Fields:-
CODE: 10 Character Length, Alpha-numeric, unique
NAME: Name of the Binding Type
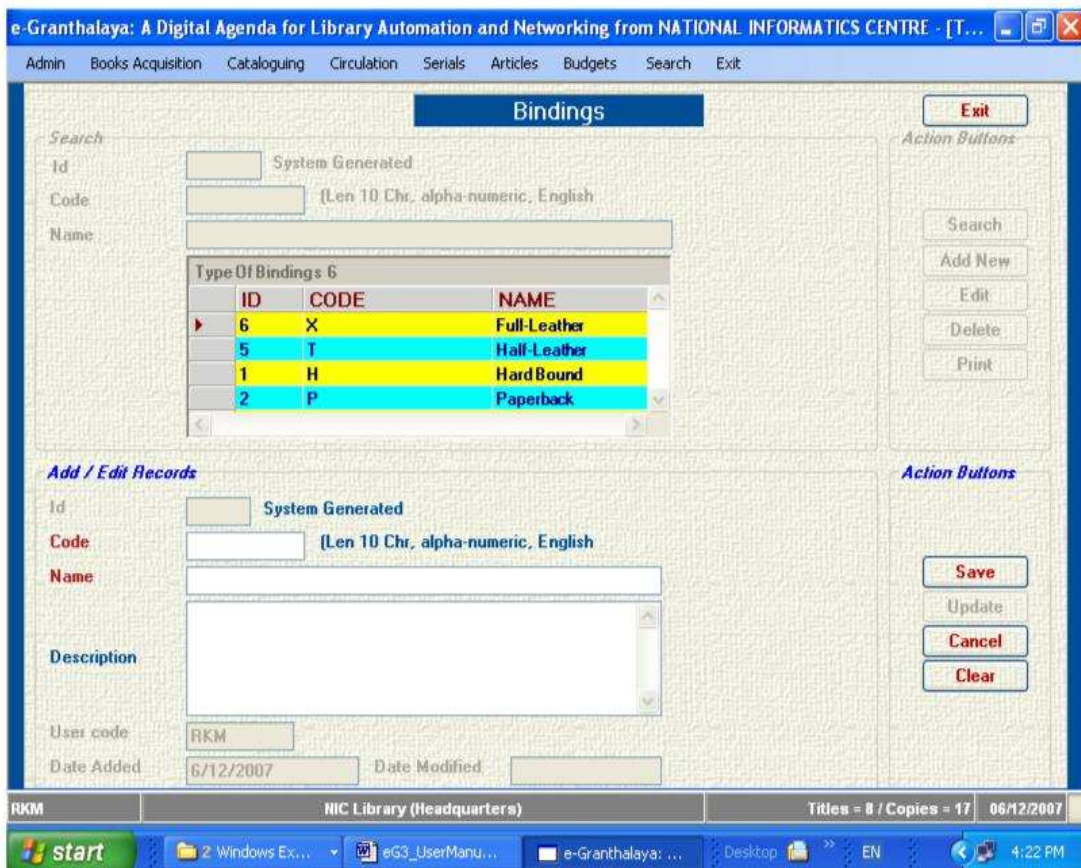
3.1.11. Add Labels in Local Language (Table: LABELS) –

This form is used to generate the labels used throughout the application in local language corresponding to the ENGLISH text. It helps in displaying the labels (after creation of local 'lang' labels) in local language and thus gives the look of a customized/localized software.

How to add labels:

1. First Restart the e-Granthalaya again and choose your local language from drop-down for which u wish to add labels.

2. Go to the Add Labels Form under System Data in ADMIN Module.

3. Press ADD button and select / type the label in the Label Text drop-Down and then Type the Regional Language Label in the below Text Box, press SAVE. Similarly, you can pickup existing labels and press EDIT, after modification press SAVE. After creating the labels in local language you can choose the language during login of the software to get displayed all labels in the selected language.
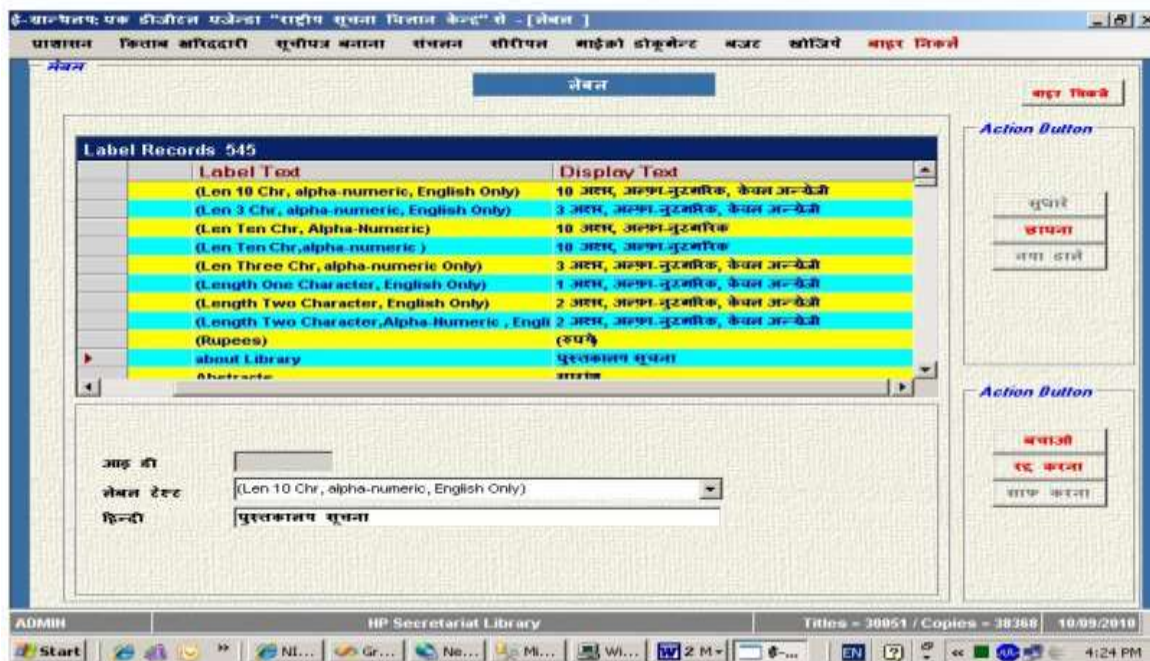
3.2. Master Data (User will create master data)

3.2.1.Add USERS (Table: USERS) -

This form is used to add/edit/delete the Users (Staff of the Library) who will operate the software for data entry. Here, permission can be set for a particular modules just by typing Y/N. To add the new user, Press ADD NEW button. Type the USER CODE (Distinct) with Names, Password and other details along with the Permission of module. Password must be minimum 10 chr long. SAVE the record. Similarly, EDIT the existing record by selecting from the Grid and then UPDATE to save changes.
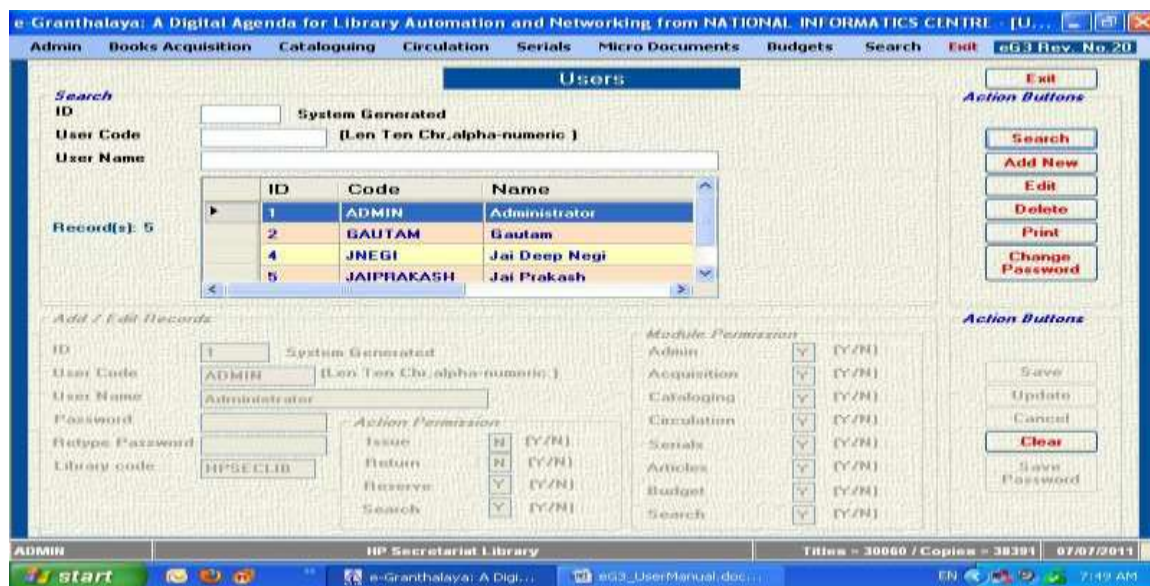
3.2.2.Message and Letter Text (Table: MESSAGES) -

This form is used to add text messages to be printed in the reports of various kinds. These text messages are printed in the green sheets / letter /orders issued from the library e.g. Approval List, Orders, Reminders, etc. The letter text can also be entered in local language.

Buttons		*Actions*
ADD NEW	-	Add new Record
DELETE	-	Delete the existing record
EDIT	-	Edit / Change the existing record
PRINT	-	Print the existing Record

Mandatory Fields:-

FILE NUMBER: 100 Character Length, Alpha-numeric
FORM NAME: 50 Char length, alpha-numeric, any name of the form
SIGN AUTHORITY   The name of the Librarian / Head, etc
HEADER   :   Name of the Library along with address
SUBJECT: Subject of the Letter/Text
TOP/BOTTOM MESSAGE: Message text

3.2.3. Sections (Table: SECTIONS) -

This form is used to add the various kinds of sections in the library such as Children section, Text Books section, General Section, Special Section, if any. It is recommended to have at least one section i.e. General

Buttons		*Actions*
SEARCH	-	To search the existing record
ADD NEW	-	add new Record
DELETE	-	delete the existing record
EDIT	-	Edit / Change the existing record
PRINT	-	Print the existing Record

Mandatory Fields:-

CODE:	10 Character Length, Alpha-numeric, unique
NAME:	Name of the section

3.2.4. Committee (Table: COMMITTEES) -

This form is used to add at least one **Library Committee** using the action buttons available. Users are advised to add at least one committee. Library Committee will be used in BOOKS ACQUISITIONS and SERIALS Module.

Buttons		Actions
SEARCH	-	To search the existing
ADD NEW	-	record Add new Record
DELETE	-	delete the existing record
EDIT	-	Edit / Change the existing
PRINT	-	record Print the existing Record

Mandatory Fields:-

CODE:	10 Character Length, Alpha-numeric, unique
NAME:	100 Chr length, name of the Library Committee
CHAIRMAN:	Enter the Name of the Chairman
MEMBER:	At least one member of the Library Committee is mandatory

START/END DATE: Period of the Committee

NOTE: In case no Library Committee exist , please assume the name as "Library Committee" and designate Head of the Library / Institute as Chairman and Librarian as the Member of the Library Committee

3.2.5. Library Details (Table: LIBRARIES) -

This form is used to store the details of the Library which is using the software. You may add one account for each participating libraries as a cluster of libraries. The software supports database management for multi-libraries. The data enter here are

printed in all the reports, introduction page of the web OPAC, etc The Library CODE must be unique and can not be changed later. The CODE will be printed on barcode labels also.

Buttons		*Actions*
SEARCH	-	To search the existing record
ADD NEW	-	add new Record
DELETE	-	delete the existing record
EDIT	-	Edit / Change the existing record
PRINT	-	Print the existing Record

Mandatory Fields:-

CODE:	10 Character Length, Alpha-numeric, unique
NAME:	250 Chr length, name of the Library
PARENT BODY:	Name of the Parent body
CITY:	Name of the City
LIBRARY TYPE	: M = Main
ADDRESS	: Library full address

NOTE: Name of the Library, Parent body and address, about Library, history, etc will be displayed on the Start Menu of the Software as well as in the Header of the main page of the WEB OPAC (Web Interface).
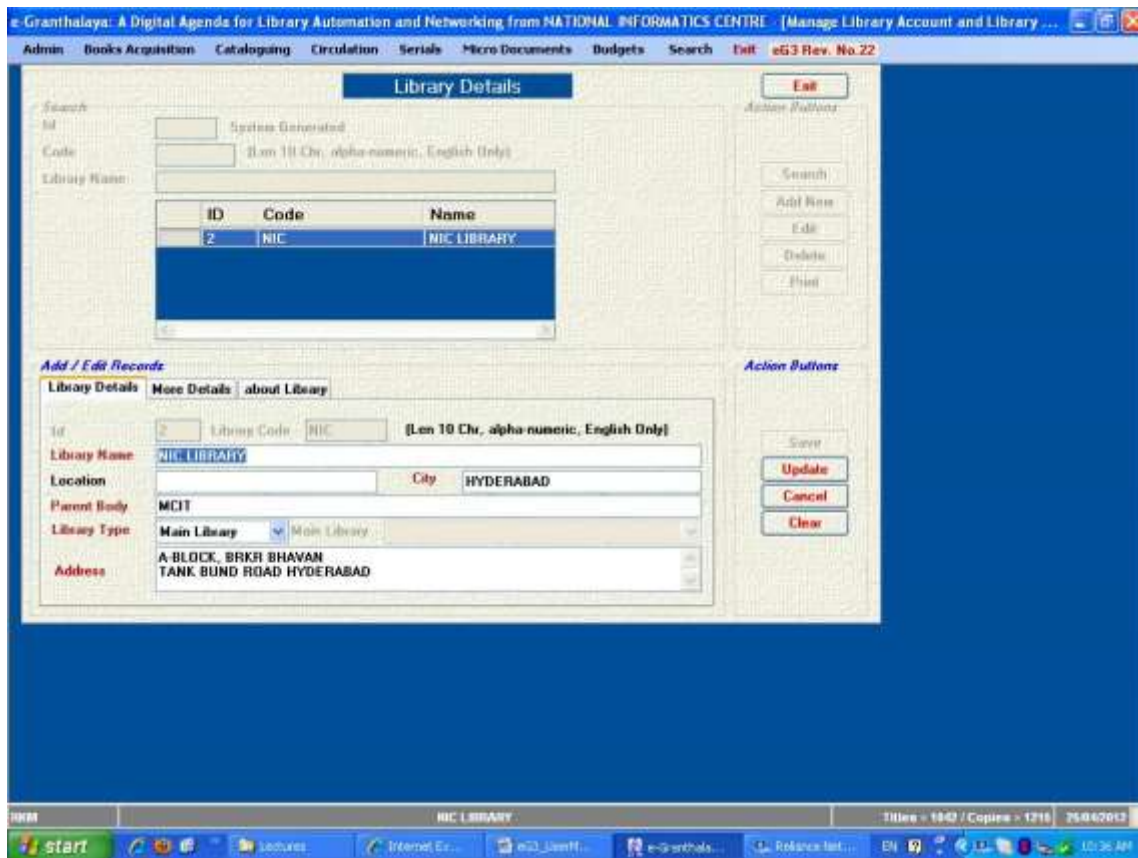
NOTE: You can add Main Library of Branch Library – In case of Branch Library, do not forget to select its Main Library. Software provides centralized purchasing and accessioning for branch libraries by the Main Library. Accession Register can be generated for Main Library, All Libraries or of Branch Library individually.

NOTE: Following 3 fields from LIBRARY Form will be displayed on the First Web Page of WEB OPAC as an Introduction of your Organization / Library:

3.2.6. Publisher Directory (Table: PUBLISHERS) -

This form is used to generate Published Directory by adding the details of the Published once as authority file. Then these records will be used in the subsequent modules while adding the details of the books and journals

Buttons		Actions
SEARCH	-	To search the existing record
ADD NEW	-	Add new Record
DELETE	-	delete the existing record
EDIT	-	Edit / Change the existing record
PRINT	-	Print the existing Record

Mandatory Fields:-
NAME: 250 Chr length, Name of the Publisher
Place
Country
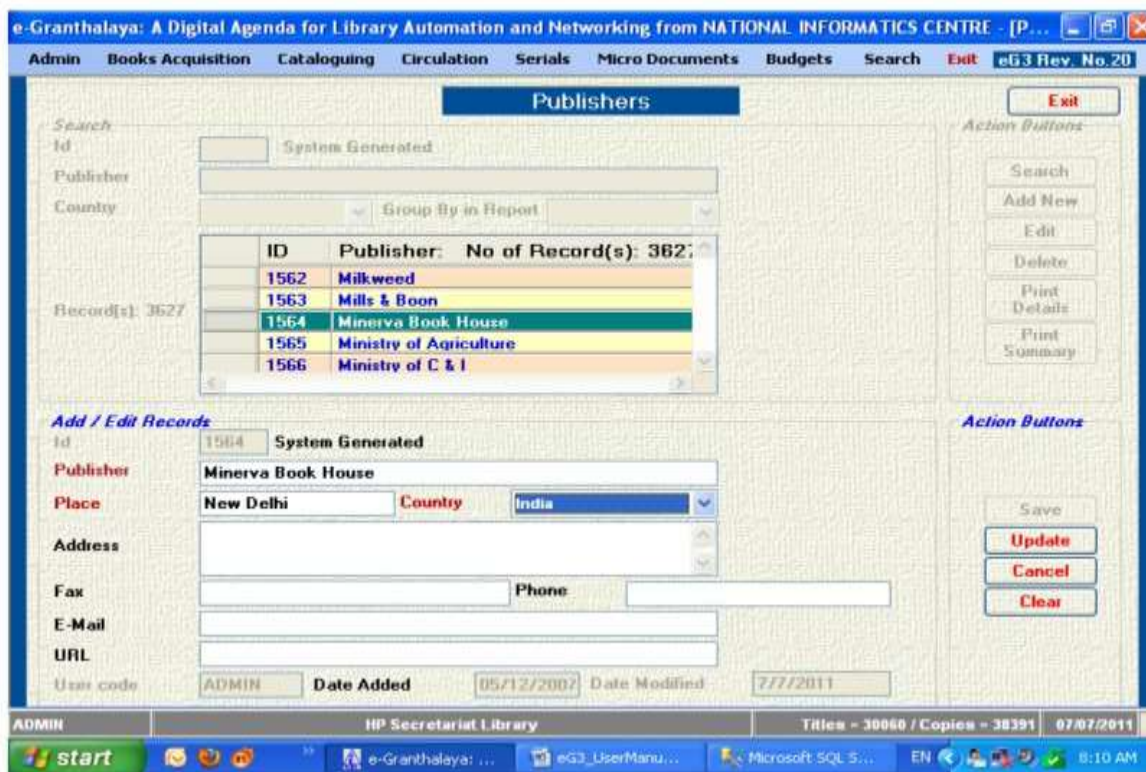
3.2.7. Vendor Directory (Table: VENDORS) -

This form is used to add VENDOR details using the fields given in the form. Later, these details will be used while purchasing the books and subscribing the journals, etc.

Buttons		Actions
SEARCH	-	To search the existing record
ADD NEW	-	add new Record
DELETE	-	delete the existing record
EDIT	-	Edit / Change the existing record
PRINT	-	Print the existing Record

Mandatory Fields:-
NAME: 200 Chr length, Name of the Vendor
PLACE
COUNTRY
ADDRESS
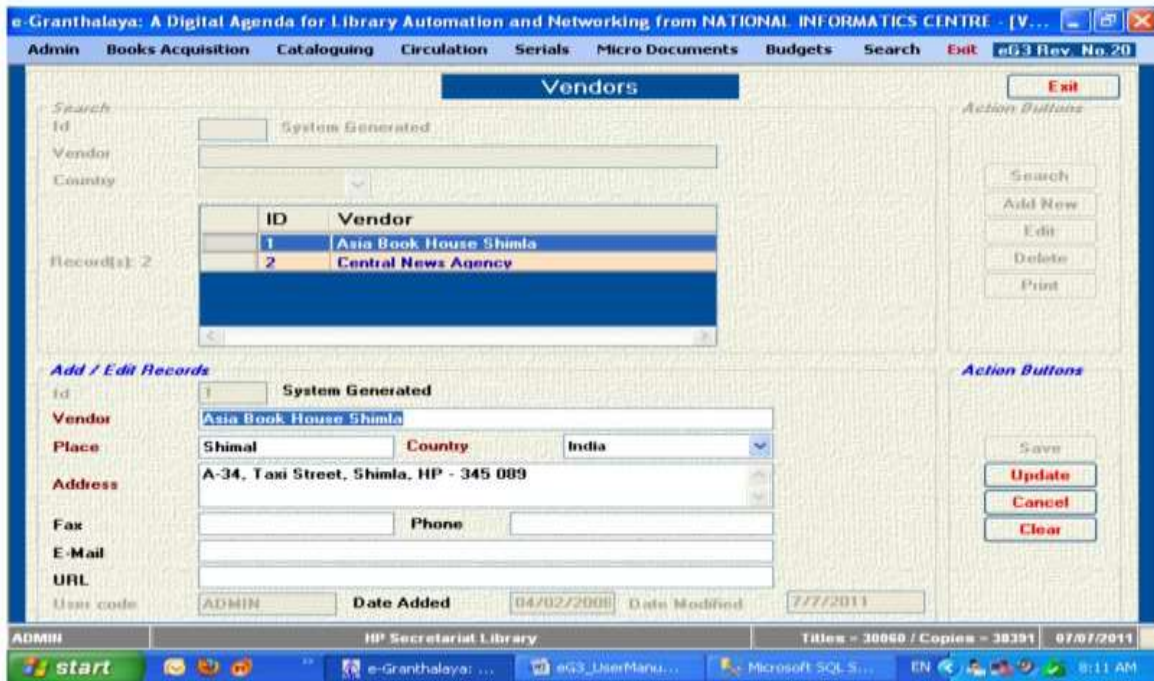
3.2.8. Subject Directory (Table: SUBJECTS) –

This form is used to create a Depth Schedule of the SUBJECTS on which books are available in the Library. This SUBJECT DIRECTORY will be available in cataloging module for choosing the appropriate Subject Heading.

Press ADD NEW to add the record and SAVE to save the record. CLASS NO and SUBJECT HEADING are mandatory fields. Under KEYWORDS Fields, you can enter Narrower / Related Terms separated by ; and space.
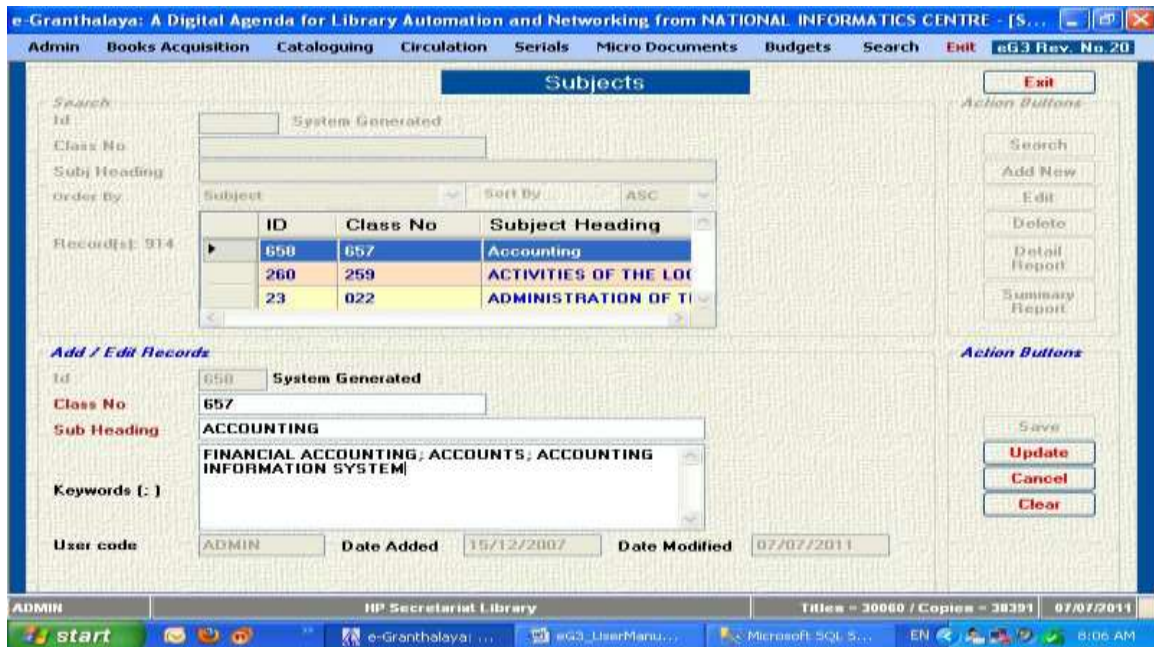
Chapter 4
Acquisition Module

This module is used for *acquisition / purchasing of the documents (books and monographs, standards, manuals, patents, etc.)* in the library. **For each purchasing, a Purchasing Record / Acquisition Record is created.** The *process of purchasing* starts from checking the Duplicate documents (if any) to the following steps:-

1. Checking duplicate
2. Adding New Title with minimum fields
3. Add New Acquisition Record (Purchasing Record)
4. Generating Approval List (Sending the list of books to approval authority)
5. Updating the Approval List (Selected / Rejected)
6. Add Order Info
7. Generating Order
8. Receive Documents
9. Accessioning of the received documents
10. Adding Billing Info
11. Adding Payment Info

Then the documents so acquired become available for the CATALOGING process. During the Acquisition process, the STATUS (Called as PROCESS STATUS) of the acquisition gets changed automatically in the following order:-

S.N. Status   Meaning
1. Requested : When New Acquisition Record is created , it is on 'Request' -
2. Sent for Approval – Once list of books sent to approval committee
3. Approved / Rejected – Titles may be approved or rejected
4. Ordered – Titles on Order
5. Received / Partially Received – Received titles along with bills
6. Accessioned / Partially Accessioned
7. Billed – Invoice added in Acq Record
8. Paid – Payment / Cheque Details added in Acq Record

Similarly, there are three CATALOG STATUS (called as CAT LEVEL) of any document namely:-

1. New   -   When new book details exist but no acquisition process (acquisition Record) started and no copy exist
2. Initial   -   When at least one Acquisition Record exist (i.e. process of acquisition started), but no copy exist
3. Full   -   When at lease one copy of the book exist

In fact, there are three main tables of the database where the details of the documents are stored in the following manner by making the relationships among these:-

1. CATS   - holds the cataloging details of the document – parent record / cat
                      record
2. ACQUISITIONS   - holds the acquisition details of the documents purchased in the
                      library – Acquisition Record – As many acquisition   records as
                      many times book was purchased. One acquisition   record for one
                      time purchasing of the title (single copy / multi copy) – Child
                      record
3. HOLDINGS   - holds holdings / copy details – as many records as copy
available
                      in the library for a title – child record

```
                    ┌──────────────────────────┐
                    │       CAT RECORD          │
                    │   (Cataloging Details)    │
                    │     Parent Record         │
                    │   (Unique Cat No.)        │
                    └──────────────────────────┘
```

Acquisition Record1		Holdings / Copy Record1
Acquisition Record2		Holdings / Copy Record2
Acquisition Record3		Holdings / Copy Record3
Acquisition Record N (Purchase Details) (Unique Acq. ID)		Holdings / Copy Record N (Accessioning) (Unique Acc. No.)
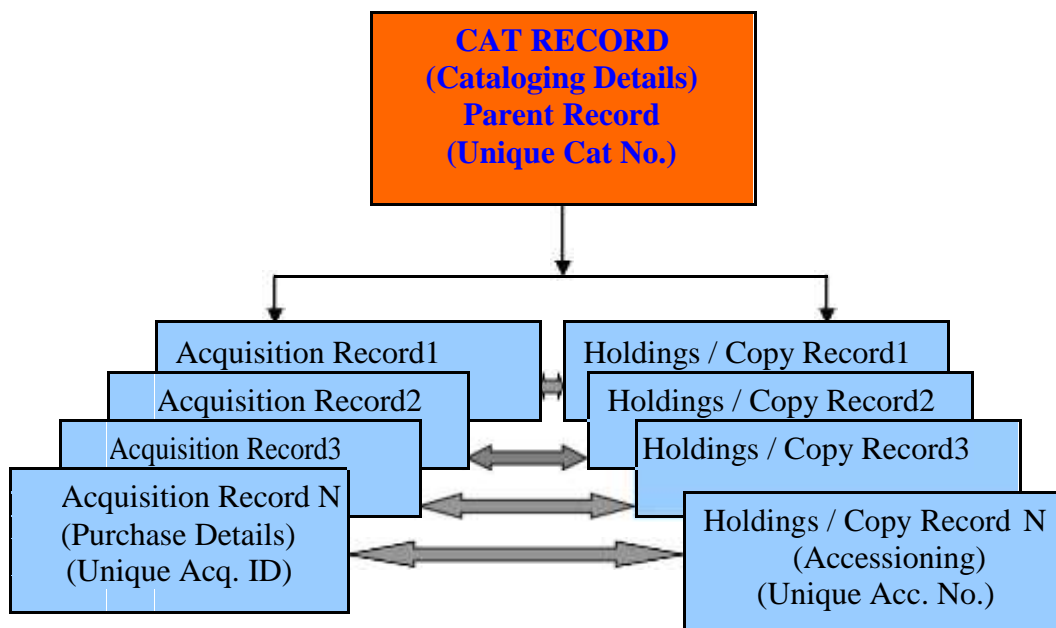
1. AUTHORS DIRECTORY

Here Author record is created once, if not already exist. The question of **Sur Name** first or **Fore Name** first should be judged by the Cataloging Code you are following. On clicking the Menu – **Author Directory**, following screen appears which shows all the records already exist in the database. These records can be retrieved by typing the value in the fields available and the pressing the SEARCH button.
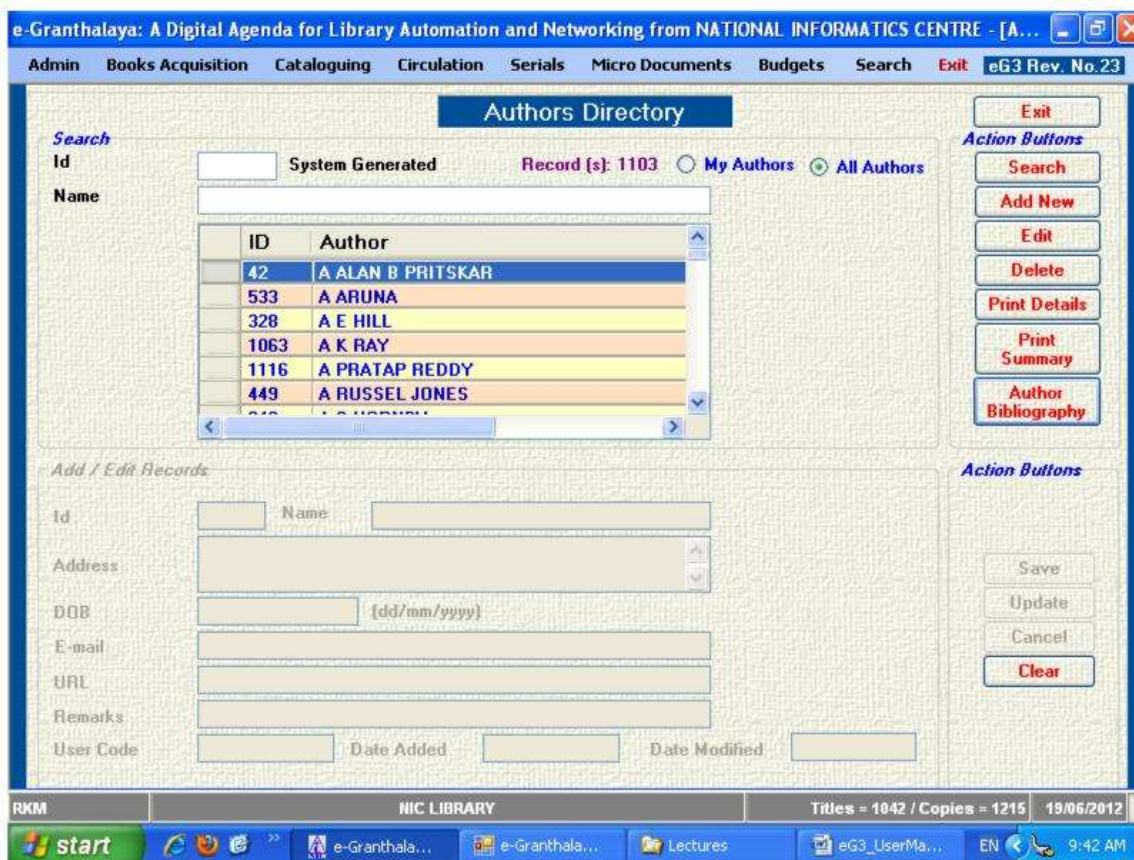
On this screen, following action buttons are available where user can do the many things as mentioned below:

Name of the Button   *Action*

EXIT   To exit the form
SEARCH   To search the existing records
ADD NEW   To add new Author if not already exist
EDIT   To edit / modify the existing record
DELETE   To delete the selected record from the Database, if the author
        does not have any reference in the database
PRINT   To generate report (summary or Detailed report)
 AUTHOR BIBLIOLRAPHY – U can print Author wise list of books

How To Select the Existing Record : To select the existing record from the Data
             Grid, please click the Record on the left
             corner of the data grid where small arrow (
) is seen, then you can press the action
             button for manipulation of the existing
             record. At a time only one record can be
             selected from the Data Grid.

Add New Author

To add new record, press the ADD NEW button, following screen will appear with blank fields.
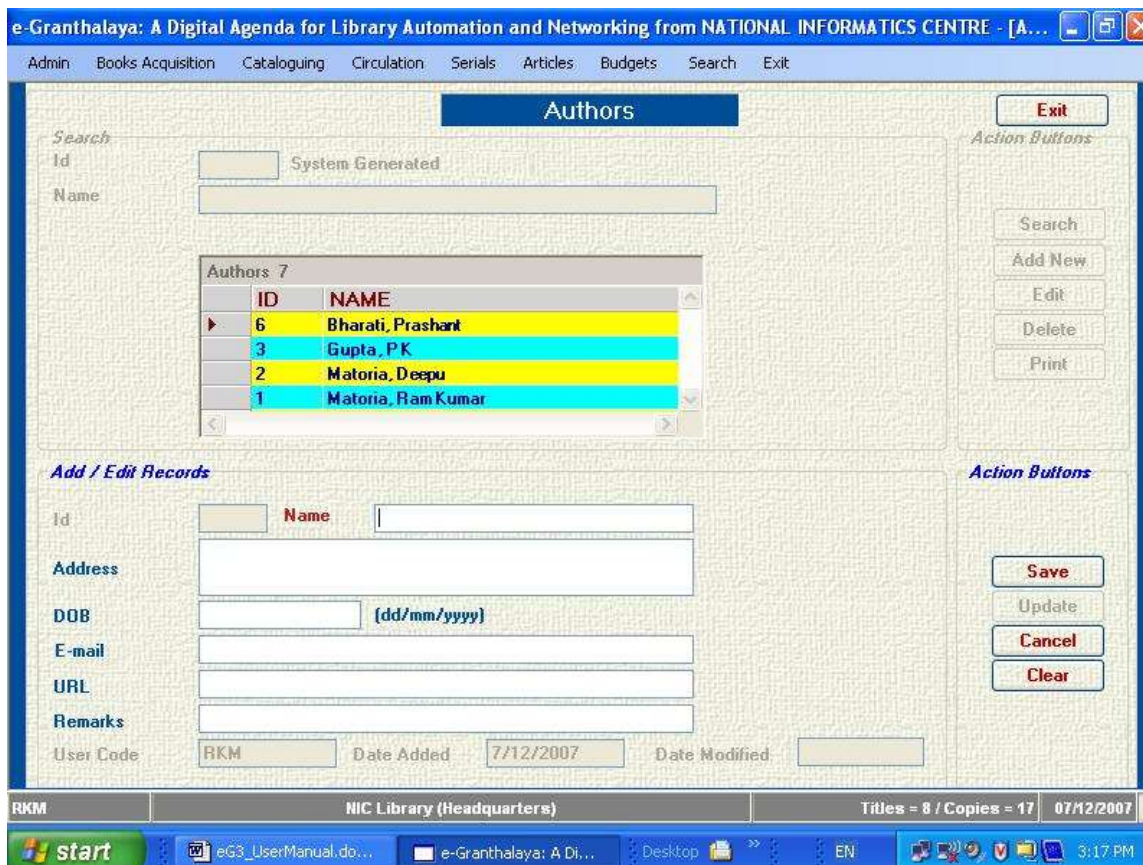
Fields   *Meaning*

ID   **-** System Generated / filled automatically
NAME   - Name of the Author – Mandatory
ADDRESS   - Optional (Address of the Author)
EMAIL   - Optional (Email of the Author)
URL   - Optional (Web address of the Author Site)
DOB   - Date of Birth
REMARKS   - Optional
Button   *Action*

SAVE   - To save new record
CANCEL   - To cancel the process

Edit / Delete Existing Author

To edit / modify and to delete the existing record , first select the record from the Data Grid and then press the Action button. For editing the record, over write the contents and press to UPDATE to save the changes or CANCEL the process.

Similarly, for DELETING the existing record, first select the record from Data Grid and the press DELETE button and confirm the process by press OK button.

PRINT AUTHOR BIBLIOGRAPHY – This option will print the Author wise list of Books in AACR2 format along with summary / no of books available in library collection.

NOTE: If an author name has been used in any catalog record in the database then the record will not be deleted as there is a relationship exist in the database. To delete the record, first remove it from all the records in the Cataloging record (if exists).

2.   CHECK DUPLICATE BOOKS

Before purchase of the books in library, it is necessary to check the existing records for the same title. The database can be searched using the following fields:-

ISBN, AUTHOR, TITLE

For searching the records of existing books, type the keyword in the text boxes and select the Boolean options. On pressing the **SEARCH** button, results will appear in the data grid.

The upper data grid will show the "Catalog" record and lower grid will show the holdings/copy record of the title selected.
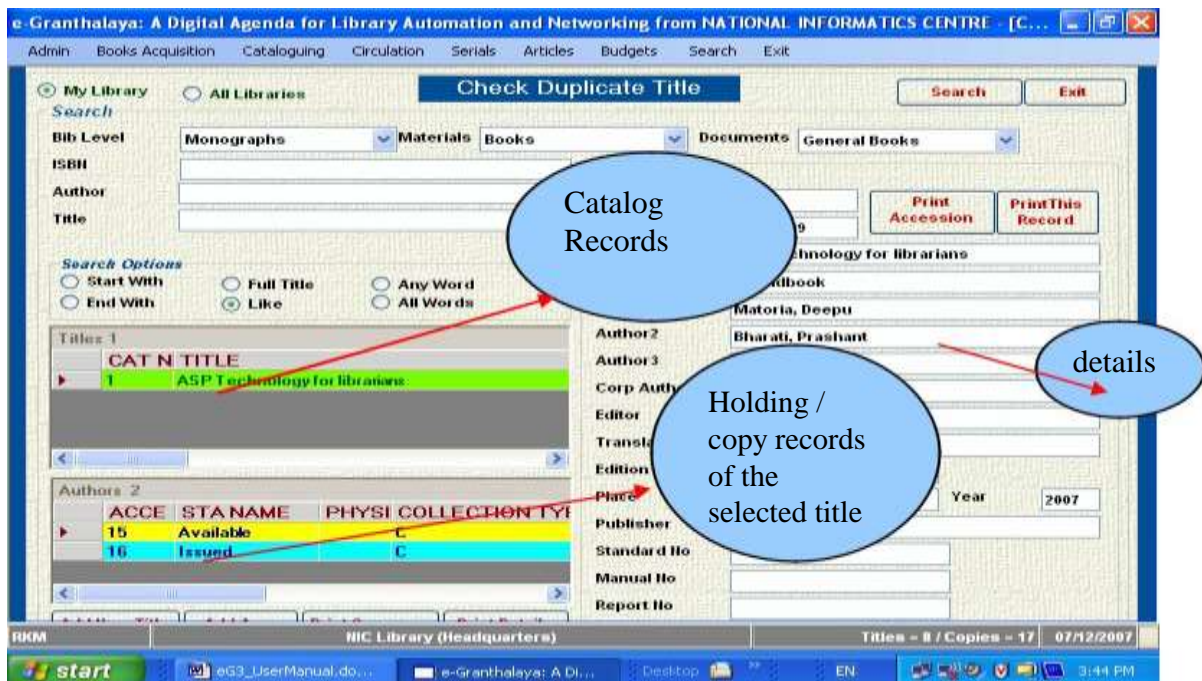
Purchasing Process of Books

The process of the Acquisition starts with the Addition of the NEW TITLE in the database with the details required as given below:-

3. ADD NEW TITLE

This form is used to add / edit / display / delete the **Catalog Record** of a title where bibliographic details are entered. However, before adding the new title, it is useful to search the Title under '**Check Duplicate Title'** Form. Once you decided to purchase a new title or more copies of the existing title, the first step is to create a new catalog record of the Title as given below (if it does not exist):

Add New Catalog Record

To add new Catalog Record, press **ADD NEW** button and type the value of the respective fields on the screen. The fields in **Red Color** are mandatory. In case where drop-down available, select the values from the existing one by pressing the small arrow ( ) and click the value to be selected.

In case of Authors and Publishers, select the names from the drop down. If desired names are not available in the respective drop down, then you can **add new author** /

Publisher name here itself by pressing the **NEW AUTHOR / NEW PUBLISHER**. On pressing this button, new form will be displayed where you can enter the new record of Author / Publisher and then **SAVE** the record. Then **EXIT** the form (Author / Publisher) , on exit again you will be back on the "Add New Title" form where you were entering the Catalog record. Add rest of the data available and save the record by pressing SAVE button.

NOTE: New AUTHOR and New PUBLISHERS can be added no in the Drop-down also available in this form.

NOTE: when you save the new catalog record a unique **CAT Number** will be generated automatically by the system which can be written on the book itself for future displaying / manipulating the catalog record in the software. This Catalog Number is just a Record Number and not linked with accession number. Accession number will be added during ACCESSIONING Process under this module.
NOTE: While adding the new record, you can select the appropriate type of materials and type of Documents from the drop down on the upper part of the form

Add Cover photo

To add cover photo of the book to the database, first save the image in your hard disk in the "gif" format. While editing the catalog record press **BROWSE** Button and select the image file from the hard disk and save the changes by pressing the **UPDATE button.**

Print Record

To print the desired record (one at a time), first display the desired catalog record in the form then press the **PRINT** button. A report will be generated on the screen which can be saved or printed in the printer.

Clear the Screen

To clear the current screen press the CLEAR button.

Search Record

To search the *existing catalog record* from the database and to display the record details, type the Catalog Number in the field CAT NUMBER. In case no catalog number is known, then *search* the catalog record by typing the value (Accession no, Title, Author) in the Search field and select the Field to be searched from the Drop down. Then press the **SEARCH** button**.** In case, more than one records appear, then browse forward and backward by pressing the **ARROW** button.

Edit Record

To edit the existing Catalog Record, first display the record details either by typing the Catalog Number in the CAT NUMBER field or search the database by pressing the **SEARCH** button discussed just in the above heading.

Once the catalog record is displayed the press the **EDIT** Button. Re-write /over write the contents and press UPDATE to save the changes or press CANCEL to cancel the process.

Delete Record

To delete the existing catalog record, first display the record either by typing the **Cat Number** in the **CAT NUMBER** field or by searching the database with the field mentioned against the SEARCH field.

Once the desired catalog record displayed, press DELETE button to delete the record and confirm it by pressing the YES button.

NOTE: The catalog record where child records exist (Acquisition Record / Holdings Record) can not be deleted. To DELETE the CATALOG RECORD, first delete the Holding Records, then Acquisition Record and then finally Catalog Record. In case copy is issued ever, then before deleting anything, first delete CIRCULATION TRANSACTIONS of that Accession Number from CIRCULATION module.

How to Download Catalog Record from Internet

ADD NEW TITLE Form provided the facility to download a catalog record (if it exists in the URL given in the drop-down) from Library of Congress, other eG3 OPACs just by giving ISBN no in the text box. However, your client PC must have the Internet connectivity to download the record. To search the catalog from Internet,

Click the 'Search From Internet' option given in Red Color on the top of the screen, then type/print the ISBN no in the text box and press GO button. The software will search the record from Internet and if it exists then it will write the data automatically in the corresponding text boxes ..then you can press SAVE button to save the record in your database.

Type ISBN no and press GO button to download the record from Internet

4. Add ACQUISITION Record

Once you added few Title records in the ADD NEW TITLE form, then here this form is used for adding "Acquisition" Record for the purchasing of Titles. It means that for each and every purchase (either for single copy or multi copies), one Acquisition record has to be added here on this form. Whatever number of copies library is going to purchase in one go, one **Acquisition Record** has to be created. In case of multi-Vol books, you must create a separate Acq. Record for each Volume.

NOTE: While generating Acquisition Record, a unique systems generated "Acq. ID" is assigned to it which is used to make relationships of the Acquisition record with Cat Records as well as Holdings/Copy records of that particular title.

This form has two parts, upper part displays the Catalog Info of the titles selected while lower part is used to hold the Acquisition Info. For any title there may be one or more than one Acquisition records depending on how many times library has purchased the copies of the book.

Display the Catalog Record

To add the new acquisition record, it is necessary first to display the parent catalog record in the Catalog Info area. It can be done in two ways:-
1.Type the Cat Number in CAT field

2. Search the specific title by typing the keyword in the SEARCH field and then select the Field from the drop down. Then press the SEARCH button.
3. Once results appear, scroll Forward or Backward by pressing the ARROW .

Add New Acquisition Record

To start the Purchase process for any title, one Acquisition Record has to be created by following the steps given below:-

1. Once Catalog Record is displayed in the CATALOG Info area, press **ADD NEW** button
2. Acq ID, Cat Number and Process Status fields are not enabled and filled automatically
3. The fields shown in RED Color are mandatory, other fields are optional
4. Add the contents in the fields
5. Add Data in "dd/MM/yyyy" format (21/02/2011)
6. Select the value from drop down, if available
7. "Reference Number" field can be used for local purpose
8. To save, Press SAVE button
9. To cancel press CANCEL button
10. To clear the screen press CLEAR button
11. On saving the new Acquisition Record is created with a unique, system generate "Acq. ID"
12. APPROVAL Number is the Approval List Number (anything alpha – numeric) which should be unique (not already available in the database)
13. On adding new Acquisition Record, A process Status is assigned automatically i.e. "Requested".

NOTE: While taking approval for many titles in one approval list, assign the SAME Approval Number in all the Acquisition Records created for corresponding titles.

NOTE: You can display catalog record which are not available in your library, in this case you can select "All Library"

Edit Acquisition Record

In case any change or editing is required in the Acquisition Record, first you display the Catalog Record of the title and press the **EDIT** button. Change / over-write/ re-write the contents in the corresponding fields and press **UPDATE** button to save the changes.

NOTE: Acquisition Record with the following **PROCESS STATUS** can only be edited:-

Requested
Rejected

It is due to the approval number unique value. Once an Approval number is processed, its status gets changed, then no more titles can be added in this approval number.

Delete Acquisition Record

To delete the desired Acquisition Record, first display the Catalog Record of the Title and then select the desired Acquisition record, press the DELETE button.

NOTE: In case, Acquisition Record has been processed it can   not be deleted. Acq. Record with "Requested" or "Rejected" process status can only be deleted.

Print the Acquisition Record

To print the Acquisition Record, first display the Catalog Record and then press the PRINT button to generate the report on the screen. This report can be printed directly of can be saved on the hard disk to manipulate later.

5.   GENERATE APPROVAL

After the Acquisition Records are generated for the titles to be purchased using the above mentioned form (Acquisition Form), the "*Approval List*" will be generated which will be sent to the "*Approval Authority*".
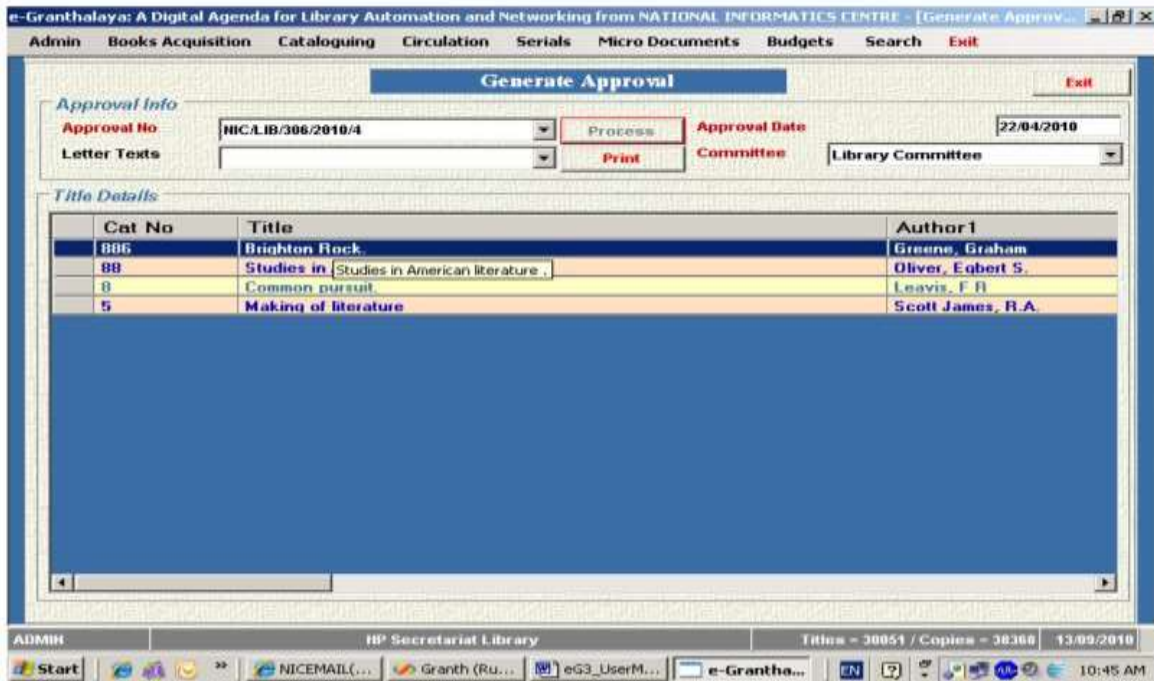
To generate the Approval List follow the steps given below:-
12. Select the "Approval Number" from the drop down
13. Press tab from the keyboard to display the list of the Titles included in the same Approval Number
14. Select the Name of Library Committee from the drop down
15. Select the Text Message form from the drop down (Approval Form)
16. Press the SUBMIT button to process the approval list
17. Press the PRINT button to generate the Approval List and take print
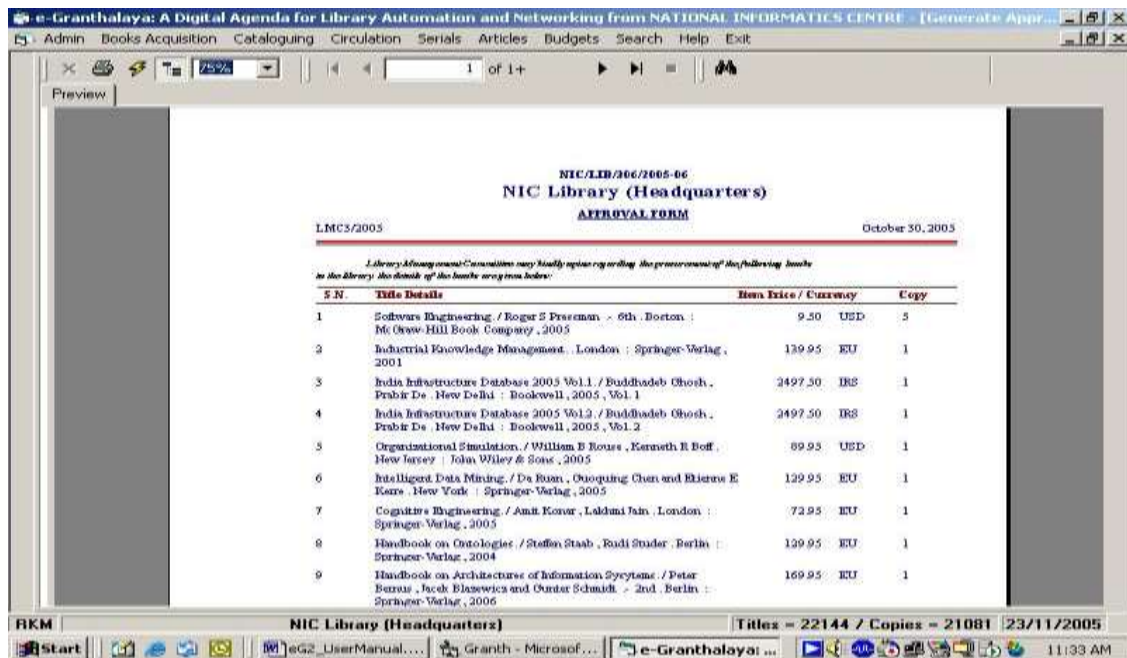
NOTE: on submit the approval list, the PROCESS STATUS of all the Acquisition Records gets changed to "Sent for Approval".

6.   UPDATE APPROVAL

The Approval List which was sent to the Approval Authority (Library Committee) will come back to the library where some of the titles may be approved while some may get Rejected. This form is used to UPDATE the status of the Acquisition Records accordingly. Follow the steps:-

1. Select the "Approval Number" from the drop down
2. Press "SUBMIT" button to display the list of the titles
3. Click the Check Box (   ) if the title Approved
4. Uncheck the check box if the title gets rejected
5. Enter the number of copy approved for each title
6. Press the UPDATE button to save the changes
7. Scroll the "Scroll Bar" available to the Right side for viewing the complete list of titles

NOTE: The titles which get approved will be assigned "Approved" process status automatically and the titles not approved assigned "Rejected" in the Acquisition Record Status

NOTE: The Acquisitions Record with the "Rejected" status can be put up again to the approval authority by assigning the new approval number on EDIT of the record.

7.   ADD ORDER INFO

This form is used to Add / Edit the Order Information to the "Acquisition Record" with the process status "Approved" or "Ordered". The titles approved will be ordered by generating the Order form in the next menu. Follow the steps:-

1. Display the desired Catalog Record of the Title
2. Select the desired Acquisition Record by press Forward or Backward Arrow (in case more than one Acq. Records exist)
3. Press ADD / EDIT ORDER INFO button
4. Enter the contents i.e. Order Number, Order Date, Copies Oredered, Expiry Date
5. Select the appropriate Vendor from the Drop down
6. Press SAVE button to save the information

NOTE: In case no Vendor exist in the drop down, press the ADD VENDOR to add new vendor record in the Vendor Form and SAVE it. After adding the Vendor record EXIT the Vendor form and select the vendor name from the drop down

8.   GENERATE ORDER

This form is used to Generate the Order so that library can place the Order in print. The Order will be generated only when Order details have been filled in the acquisition record using the Previous form i.e. Add Order Info form. To generate the Order form follow the steps:-

1. Select the desired ORDER NUMBER from the drop down
2. Press SUBMIT button to display the list of titles included in the same order
3. Check or Uncheck the "Check Box" to include / remove the titles in a particular order of a vendor
4. Select the Vendor name form the VENDOR drop down
5. Press UPDATE button to save the info
6. Press PRINT Button to generate the Order report for print

NOTE: A unique "Order Number" will be assigned to a specific Vendor while adding the Order Info in the previous form. Similarly, to include many titles in the same Order Number, assign the Same Order Number while adding the Order Info in the previous menu.
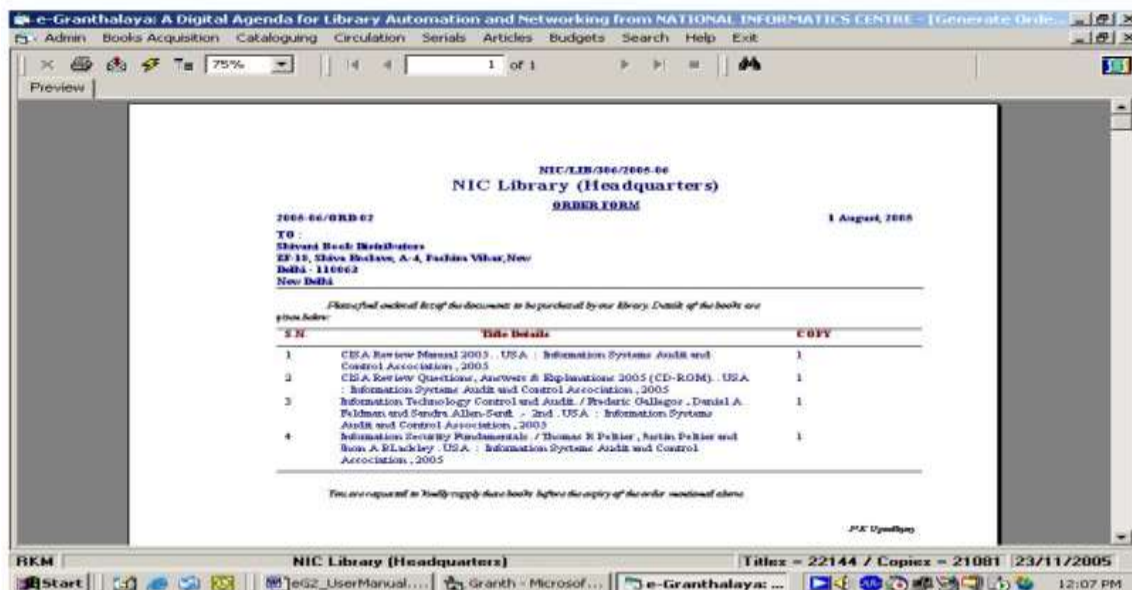
9.   RECEIVE DOCUMENTS

This form is used to receive the documents ordered to the Vendor in the previous menu. There may be possibilities that the copies being received may be less that the copies ordered. Therefore, while receiving the documents, it has to be noticed the no. of copies being received. For receiving the ordered documents, follow the steps:-

1. Click the "Receive Documents" menu from the ACQUISITION module
2. Select the appropriate Order Number from the drop-down
3. Press SUBMIT button to view the list of titles ordered along with the number of copies ordered
4. click the "Check Box" given against the Title in the Left side with the sign [ ] to receive the title
5. Type the number of copies being received given in the right side against the Title
6. Leave the box unchecked against the titles which is not supplied by the vendor
7. Press UPDATE button to save the changes
8. In case you need to scroll the all the titles on the screen, please use the "Scroll Bar" available on the right side of the screen.

NOTE: On receipt of the documents ordered the PROCESS STATUS of the Acquisition Record changed to "**Received**". However, in case, less number of copies received the PROCESS STATUS will be "**Partially Received**" and it means that it is a Pending Order. Whenever, you receive the rest of the copies of the pending order , the status will become "Received".

10.   ACCESSIONING THE RECEIVED DOCUMENTS

Once you document(s) is/are received, then "Accessioning" will be done of these documents. In India, generally, accessioning is done manually in the Accession Register then these can be entered in the software. To accession the received documents, following steps are required:-

1. Select the "Accessioning" menu from the ACQUISITION module
2. The documents received (either Partially or fully received) become available in the data grid on the form
3. Select the Title from the data grid and click
4. Press ADD NEW button available in the bottom of the screen
5. Enter the details of the fields as available
6. Fields in **Red** color are mandatory (Accession No and Accession Date)
7. Select the appropriate "Collection Type " (Circulation or Reference)
8. In case of multi-volume books, there may be Copy ISBN

9. Select the Section of the Library to which title belongs
10. In "Location" field, enter the physical location of the book on the Shelves
11. REFERENCE NO field can be used for local needs
12. Press SAVE button to save the Holding/Copy Record
13. In case of more that one copy of the title, do the same steps again
14. Browse the "Arrow" button forward or backward to view all the copies

NOTE: In this way you can add as many copy as you have received, one by one, generating similar number of Holding / Copy records. The accession number field is alpha – numeric in nature and 50 Characters in length. ***System will not accept the Duplicate accession number. On accessioning the copies, the status of the Acquisition will become "Accessioned" or "Partially Accessioned".***

11.   Add BILLING Info

This Form is used to add Bill / Invoice details to the "Acquisition Record" for which documents have been received (with the Process Status of "Received" or "Partially Received" or "Accessioned" or "Partially Accessioned").

The Invoice details required in this form includes the Invoice / Bill no as printed on the Invoice/bill, bill date, etc. Following steps are required:-
1. Select the "Billing Info" menu from ACQUISITION module
2. Display the Catalog Record either by typing the CAT NUMBER in the CAT No field or by searching the title using RETRIEVE button
3. Select the desired "Acquisition Record" from the bottom portion of the form by pressing the ARROW button (in case there are more than one Acquisition Record of the same title)
4. Press ADD BILL INFO button to activate the writing

5.   Add Bill no, date, etc. in the corresponding fields enabled
6.   Fields shown in Red are mandatory
7.   Press SAVE button to save the changes

NOTE: The Invoice / Bill number should be enter as printed on the bill. Same bill number / invoice number will be used in the BUDGET module to process the bill. Once you save the invoice details to the record, the status of the Acquisition Record changed to "**Billed**". Now the record is ready for the next step where Payment details will be added.

12.   Add PAYMENT Info

This form is used to add **payment details** (cheque no., date, etc) to the Acquisition Record with the status "Billed". Following steps are required to follow.

1.   Select the "Payment Info" menu from the ACQUISITION module
2.   Display the Catalog Record of the title either by typing the Cat Number in the CAT NUMBER field (if known) or by searching the desired title with the RETRIEVE button
3.   Select the desired Acquisition Record from the lower portion of the form by browsing the records with ARROW button
4.   Press ADD / EDIT PAYMENT INFO to activate the fields for writing
5.   Enter the Cheque number and date in the corresponding field
6.   Press SAVE to update the record

NOTE: On up-dation of the Acquisition Record, process status changed to "Paid".

13.   WORK FLOW of the ACQUISITION PROCESS

```
                    START
                      │
                      ▼
              ┌───────────────┐
              │  Check        │
              │  Duplicate    │──── Yes ────┐
              │  Title        │             │
              └───────────────┘             │
                      │                     │
          No Duplicate/New Copy             │
                      ▼                     │
              ┌───────────────┐             │
              │ Add New Title │             │
              │   Details     │             │
              └───────────────┘             │
                      │                     │
                      ▼                     │
              ┌───────────────┐             │
              │  Add New      │◄────────────┘
              │  Acquisition  │
              │  Record       │
              └───────────────┘
                      │
                      ▼
              ┌───────────────┐
              │  Generate     │
              │  Approval     │
              └───────────────┘
                      │
                      ▼
              ┌───────────────┐
              │  Update       │──── Rejected ──┐
              │  Approval     │                │
              └───────────────┘                │
                      │                        │
                   Approved                    │
                      ▼
              ┌───────────────┐
              │ Add Order Info│
              └───────────────┘
                      │
                      ▼
              ┌───────────────┐
              │  Generate     │
              │  Order        │
              └───────────────┘
                      │
                      ▼
```
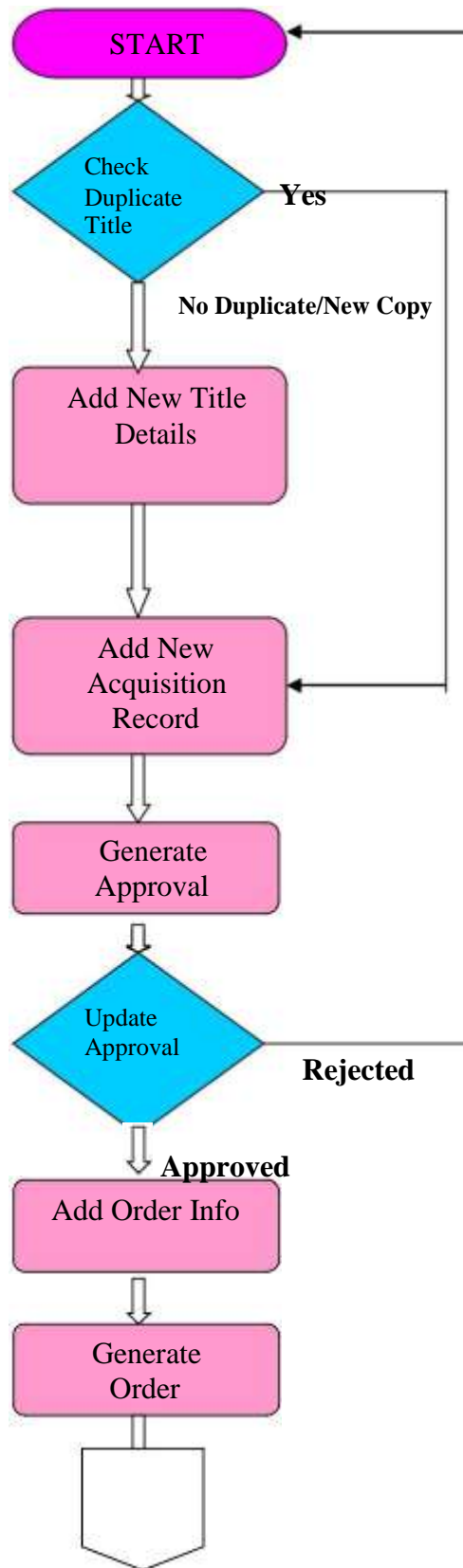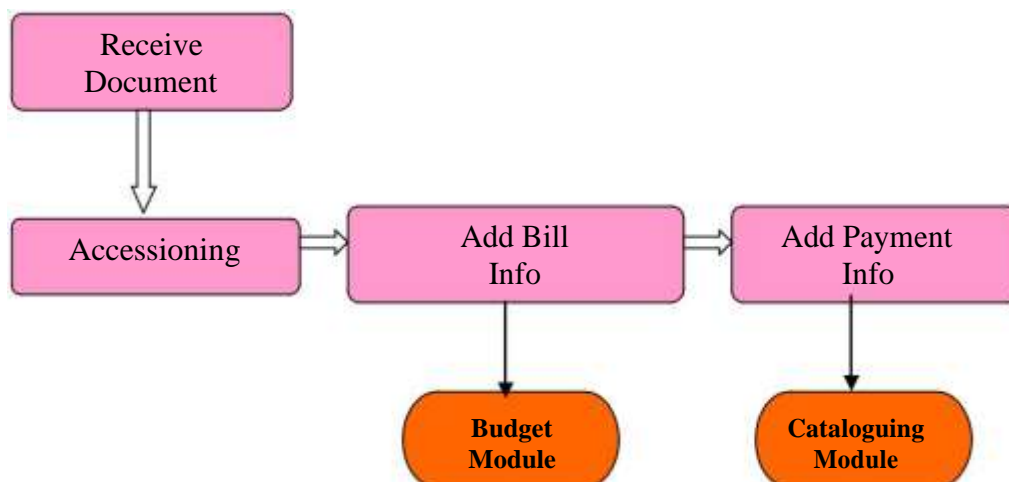
14.   BACKWARD MOVEMENT OF the ACQUISITION PROCESS

In *e-Granthalaya* software, backward movement is possible which means user can go backward step – by – step , from process status "Paid" to the "Requested". This can be done by removing the appropriate contents from the Acquisition Records. In this way it is possible to delete the Catalog Record as well as Acquisition Record from the database.

Chapter 5
Cataloguing Module

This module is used to add rest of the data elements in the cataloging records to generate full catalog records. The additional data elements constitute the foundation of the Cataloging Code being used by the library. Besides, in this module many other utilities have been provided to update / refine / complete the three main type of records:-

NOTE: This module can also be used to enter the BOOKS DETAILS DIRECTLY without using BOOKS ACQUISITION Module.

Cataloging Record (Catalog Details of the Title)
Acquisition Record (Purchasing Details of the Title)
Holding Record (Copy / Accession Details of each copy of the Title)

This module consists of the following menu:-

1. **Retro Conversion** -   Used to enter the data of existing collection of the library direct / short-cut method (no provision of cost of books)
2. Full Catalog   -   Used to add additional data elements in the records
3. Change Copy Status -Used to change the status of the Copy of a title
4. Update Holding Info-Used to update/modify the Holding Records
5. Status Wise Collection-Used to view the status wise collection of the library
6. Stock Verification -   Stock Verification Process
7. Bar Code Labels -   Generate Bar Code labels
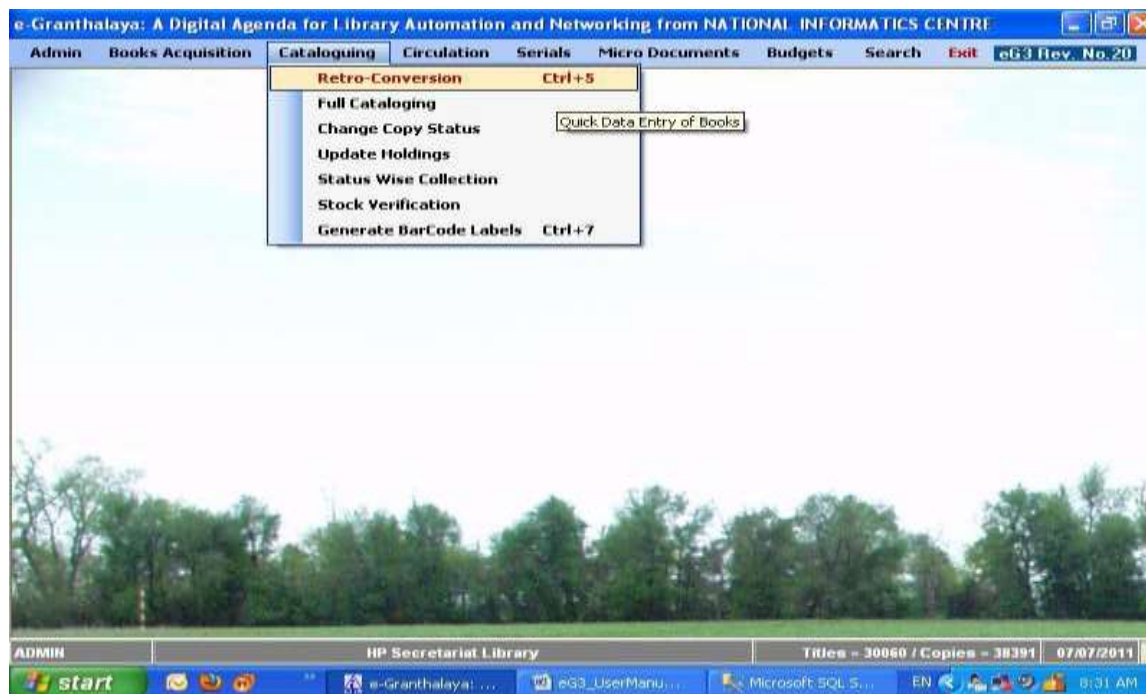
1. Retro-Conversion

This form is used to add book records (Catalog Details and Holdings Data) for the **existing Collection / new books directly without using ACQUISITION Module.** It means that the Retro Conversion utility is the short cut where you can add the data in a single form in one go. This utility is very useful to save the time of the library staff where they can add the books data direct avoiding the various steps required in the ACQUISITION module.

NOTE: In this form you can not add the Purchasing details of the book like Cost, Vendor, Bill no, etc. To add these details (Purchasing Details), you can use FULL CATALOGUING Form under the CATALOGING Module.

NOTE: This form consists of TWO Parts – Top part is for adding CATALOG Record of the book while the bottom part is for adding Holding / Copies Records.

Uses of This Form
This form is used for the following work:-

1. Add New Catalog / Holdings Records of the Books and monographs

2. Display the Catalog Record in the form either by typing the Cat Number in the CAT NUMBER field (if cat no is known) or by searching the desired catalog record using SEARCH button available on the form
3. EDIT the data after display of the record
4. DELETE the Holdings Records and then Catalog Record
5. PRINT the Record details

NOTE: On this form the Catalog Record can also be printed with PRINT button, deleted with DELETE button. The records which has relationship in the database can not be deleted

Add New Catalog Record

To add new title (Catalog Record), follow the steps are required:-

1. Press ADD NEW button given in the Catalog Info Part (Top most part of the form)
2. Add the contents / data elements in the corresponding fields
3. Select the value from drop down wherever available
4. In case of **Author** and **Publisher** names not available in the drop down, add / type names in corresponding Drop-down on this form and no need to add their names in the Master Table. From these drop-down their names will be saved automatically in Master Table.
5. Fields in Red color are mandatory
6. Use semicolon in case more than one value is typed in one field e.g. KEYWORDS field
7. Select the appropriate Bibliographic level, materials type, documents type from the drop down
8. Type ISBN data only and not the word (ISBN) as printed on the book
9. Browse the image to be added with the record by pressing the BROWSE button
10. press **SAVE** button to save the Catalog Record

NOTE: Catalog Record of any book may also be downloaded from Internet using this form. For downloading the catalog record, click the OPTION button on the top of the screen with red color with "**Download Record from Internet**" and then type the **ISBN** in the text box and press **GO** button. In case, record downloaded, then SAVE the Record.

Add Holdings/Copies Record

After saving Catalog Record, a unique CAT NUMBER will be generated automatically and follow a message '**Do you want to Add Holding/Copy Record**?"..press **Yes**..then you will type the copy data in the bottom part of the screen. SAVE Holding button to save the copy record.

NOTE: In case, more than copy available for a book, add all the copies, one by one, under the same catalog record (Cat number) in the Holdings part of the form at bottom.

Edit Catalog/Holding Records

For editing the Catalog Record as well as Holding Records, please follow the steps given below:-

1. Display the desired Catalog Record in the top portion of the form by typing the Cat Number in CAT NO filed given on the left top corner
2. In case cat no is not known, search the desired Catalog record by pressing the SEARCH button and browse the record using ARROW button in forward / backward direction
3. Once desired catalog record is displayed, press the EDIT button to activate the fields
4. Re-write /over write the contents and press UPDATE button.
5. Press OK to confirm the updation
6. In case you want to add/update the cover photo to the record, press the BROWSE button and select the "gif" file from the local hard dsik and press UPDATE and save the changes

NOTE: To EDIT the holdings record, check the Check Box and replace the data and then press UPDATE HOLDING button to SAVE the record

Delete the Catalog Record

1. Display the desired Catalog Record by typing the Cat Number in the CAT NO filed or by searching the catalog
2. Press the DELETE button and confirm the deletion by pressing YES button.

NOTE: Catalog Record will only be deleted when there is no Acquisition Record and /or Holding Record exist in that Cat no. First Delete all the child records and other references of the Catalog Record and then delete it.

NOTE: To delete the Holding Records, Check the check box against desired holding record and press DELETE HOLDING button

REPORT: To get the Print of the record, press REPORT button

2. Full Cataloging – A Utility for Direct Entry of Books with all the fields and Purchasing details (Optional)

This form is used to add library records for the **existing Collection of the library**
This form has been divided in the following three parts:-

1.   **Catalog Info** – To Add Catalog Details of the Book - Mandatory
2.   **Acquisition Info** – To Add Purchasing/Acquisition Details (Optional)
3.   **Holding Info** – To Add Copies Details with Accession Numbers – Mandatory, Multi-Copies with individual records here

<u>NOTE</u>: All the three parts of the forms are arranged on the same one below another, these can be scrolled down / up by using the *Vertical Scroll Bar* given in the right side of the form.

<u>NOTE:</u> As we have mentioned that there are three records created to complete the data entry of any title in this software. These three type of records are created in the following manner:-

Catalog Record – Parent Record with full bibliographic details of the title
Acquisition Record – Child/ren record(s) (relationship with Catalog Record)

which contains details of the purchasing process of that title in the library
Holding Record - child/ren record(s) contains the copy information of the title (Accession Number details)

4.1. CATALOG INFO

Add New Catalog Record

To add new title (Catalog Record) , follow the steps are required:-

11. Click the "Retro Conversion" menu from the CATALOGING module
12. Press ADD NEW button given in the Catalog Info Part (Top most part of the form)
13. Add the contents / data elements in the corresponding fields
14. Select the value from drop down wherever available
15. In case of Author and Publisher value is not available in the drop down, add new record by pressing the corresponding button (PUBLISHER and AUTHOR) given against these fields, on adding new record, EXIT these (Author / publisher / subject) form
16. Fields in Red color are mandatory
17. Use semicolon in case more than one value is typed in one field e.g. KEYWORD field
18. Select the appropriate Bibliographic level, materials type, documents type from the drop down
19. Type ISBN data only and not the word (ISBN) as printed on the book
20. Browse the image to be added with the record by pressing the BROWSE button
21. press SAVE button to save the Catalog Record
22. Other rules for data entry are similar as given under the ACQUISITION module

Edit Catalog Record

For editing the Catalog Record, please follow the steps given below:-

7. Display the desired Catalog Record in the top portion of the form by typing the Cat Number in CAT NO filed given on the left top corner
8. In case cat no is not known, search the desired Catalog record by pressing the SEARCH button and browse the record using ARROW button in forward / backward direction
9. Once desired catalog record is displayed, press the EDIT button to activate the fields
10. Re-write /over write the contents and press UPDATE button.
11. Press OK to confirm the updation

12. In case you want to add/update the cover photo to the record, press the BROWSE button and select the "gif" file from the local hard dsik and press UPDATE and save the changes

Delete the Catalog Record

3. Display the desired Catalog Record by typing the Cat Number in the CAT NO filed.
4. Press the DELETE button and confirm the deletion by pressing YES button.

<u>NOTE</u>: Catalog Record will only be deleted when there is no Acquisition Record and /or Holding Record exist in that Cat no. First Delete all the child records and other references of the Catalog Record and then delete it.

Search Catalog Record

1. You can SEARCH the existing Catalog here by typing the search string in SEARCH Text Box with the fields option like Accession No, Title, Author, ISBN) Or
2. For displaying the Cat Record, type the Cat number in the CAT NO field
3. While searching the Catalog Record and you get many records, browse the records in forward / backward direction using the ARROW buttons.

Print Catalog Record

To print the Catalog Record (one at a time), first display the desired catalog record and then press PRINT button to generate the report

CLEAR button is used to clear the form

4.2. ACQUISITION INFO (Optional)

The *Acquisition Record* can be displayed/added/edited/deleted in the middle part of the Form. You can scroll down the screen by pressing the small ARROW button given on the Vertical Bar Strip in the Right Side. This part of the form is OPTIONAL where you can save Purchasing details of the copies of a title.

Add New Acquisition Record

After adding/displaying the *Catalog Record* of a title, you can add *Acquisition Record* where purchase information can be stored corresponding to the title. Following steps are required

1. First display the Catalog Record in the top most part of the form either by typing the Cat Number in the CAT NUMBER field (if cat number is known) or by searching the desired catalog record using the SEARCH button.

2. After display of the desired Catalog Record, scroll down the Vertical Scroll bar by pressing small arrow given in the right bottom, and thus go to the second part of the form i.e **Acquisition Info part**.
3. Press **ADD NEW** button to activate the Acquisition form for adding data
4. Enter the acquisition data (purchase details) in the corresponding fields
5. Save the acquisition data by pressing the SAVE button
6. On save Acquisition Record is created with the unique ACQ. ID generated automatically

NOTE: On this screen you can add as many Acquisition Record as many times copies of the same title have been purchased. No fields are mandatory in ACQUISITION Form, all fields are optional, fill those fields only which data available with you.

Edit existing Acquisition Record

You can edit the Acquisition Record up to some extent if the Process Status of the Record is Requested, Approved, etc. Once you have processed the Acquisition Record, it is locked can not be edited much.

To edit the Acquisition Record, do the following :-

1. Display the parent record i.e. Cat Record
2. Scroll down the screen to the middle part of the form where Acquisition Record is displayed by pressing the small arrow given in the Vertical scroll strip on the right side
3. Press EDIT button if it is enabled (in case Record is locked, the EDIT button will not be enabled) to activate the fields
4. Re-write / over write the data and press UPDATE button to save the changes

Delete the Acquisition Record

1. First display the Catalog Record in the top part of the form
2. Scroll down the screen to the middle part where acquisition record(s) is /are displayed
3. Select the desired Acq Record using the Backward / forward ARROW button (in case more that Acq Records exist)
4. Press the DELETE button to delete the record
5. Confirm the deletion by pressing the YES button

NOTE: Before deleting the Acq Record, first remove all the references of this record from the database.

Print the ACQ Record

To pint the Acquisition record, press the PRINT button to generate the report.
Similarly to "add / Edit" vendor record press the ADD/EDIT VENDOR button and do the things on the form , EXIT the form and you will back on the same Retro Conversion form

Acquisition Records Status

In the software, Acquisition Records are generated in two modules, in BOOKS ACQUISITION Module and in CATALOGING Modules. Accordingly, status of the Acquisition Record will be unique as given following:

Requested – Once you add new Acq. Record
Direct Accessioned – Once you create an Acq. Record in Full- Cataloging and Add at least one Copy/holding of the book and select the same acq ID from the drop-down available in the Holdings record.

4.3. HOLDING INFO

On this part of the Full Cataloging Form, you can add / edit /delete /print the Copy Information added to the Title.

Display the Holding Record

To display the Holding Record of a title, first display the main record i.e. Catalog Record in the upper part of the Retro Conversion Form either by typing the Cat Number in the CAT NO field or by pressing the SEARH button. Once you display the Catalog Record, all its child records get displayed (Acquisition Record(s) and Holding Record(s) in their respective parts.

Add New Holding Record

This is third record under Retro Conversion where you will add Holding Record to hold the copy details, *one holding record for one accession number.* To add the Holding record for a given title, follow the steps given below:

1. Press ADD NEW button to activate the fields to be added in the Holding Part
2. Add data in the corresponding fields
3. Select the corresponding ACQ ID from the drop down to link the Holding Record with Acquisition Record, if any. In case, no purchase information has been added, leave the ACQ ID field blank.
4. Press SAVE button the save the record

5. On saving the Holding Record, a unique Hold ID is created automatically
6. In this way you can add as many holding record as there are copies of the title, one by one by pressing ADD new button again

NOTE: While adding new HOLDINGS Record, do not forget to select value from ACQ_ID drop-down in case you have created an Acquisition Record of the same book.

EDIT Holding Records

You can edit the existing Holding Record using this part of the fprm, by following the steps:-

1. Display the Catalog record by typing the Cat Number in the CAT NUMBER field on the top portion of the Catalog Form.
2. In case, you do not remember Cat No, search the desired Catalog Record by press SEARCH button available on the top part of the form.
3. When you display the Catalog Record , then you can edit the existing Holding Record by pressing the EDIT button
4. Re-write / over write the Holding Info and press UPDATE button to save the changes

Delete Records

Similarly, you can delete the Holding Records by pressing the DELETE button available on the Holding Part of the form. However, First delete all the references of these records from the database and then delete these records. For example, first you must delete the CIRCULATION Records, if available, of the Holdings.

Print Records

Similarly, you can take the print of these records using PRINT button in each part of the form.

3. CHANGE COPY STATUS

This form is used to change the STATUS of the copy of a title. There are various status of the copies in a library such as Available, Issued, Damaged, Lost, Withdrawn, etc. These status are first added in the master table of the STATUS in the database using "Status of the Books" menu under the SYSTEM DATA in ADMIN module. The details have been given in the manual under the ADMIN module.

NOTE: You can add n number of STATUS in the ADMIN Module under Master Data >> Copies Status Form

To change / update the STATUS, following steps are required:-

1. Select the "Change Status" Form from main menu of the CATALOGING module
2. The form has two parts i.e. Upper part at the top which displays the Catalog Record and the bottom part displays the Holding Record
3. type ACCESSION NUMBER in the ACC NO field to display holding Record.
4. Select the desired Status from the drop down menu of the STATUS fields on the form
5. Press UPDATE button to save the changes

NOTE: In this form, only STATUS of the book copy can be changed and not other fields. For taking the print of all the copies with a particular status, please use the next menu i.e. Status Wise Collection
NOTE: During Change Status u can add text/reason in REMARKS Field also.

4. STATUS WISE COLLECTION

This form can be used to view or generate the report of the collection in a library depending on the STATUS of the copies such as Issued, Lost, damaged, etc. On this form no up-dation is required. To search the library collection status wise, follow the steps:-

Search the Collection

1. Select the menu "Status Wise Collection" from the CATALOGING module
2. Select the desired "Status" from the drop down menu given under Status heading
3. To view complete list, press the SEARCH button
4. List of titles with the selected Status will be displayed in the
5. The records can also be searched on the basis of specific Title, Cat Number, Accession Number
6. Select the Order by / Sort by option to display the results in the desired fashion

View the Details

7. Click the desired result item (title) from the Data Grid to view the details of the Record in the right side fields
8. Take PRINT in various modes by pressing the corresponding PRINT button

NOTE: Get print of the results with order by many fields selected from 'Group By In Report'

6. STOCK VERIFICATION

This Form is used to carry out the 'Stock Verification' of the existing collection of the Library. However, SV has to be done manually by checking and noting down each available accession no on the racks and later by up-dation of each holding record in the database. However, in case Bar Code labels are pasted on each book then direct reading by Bar Code reader and updating each holding record automatically is also possible. Following steps are there in SV:

STEP 1: Initiate the SV Process by just typing the YEAR in 'yyyy' format and press the INITITATE button. This step will create a Column with 'SVYEAR' name in the HOLDIGNS Table of the database.

STEP 2: Click the button to 'Transfer the existing Holdings except 'Available' no STATUS' of all the accession to newly created column, then refresh the GRID. Refresh the GRID.

STEP 3: Update Copy Status – Here you can update the current status of each copy available on Shelf either manually just by typing the accession number and by pressing the UPDATE button (Keep the status AVAILABLE from drop-down). Before updating the records you must select the corresponding STATUS (Available) from combo which will be saved with each record. In case you have bar coded the copies then you can update the status just by reading the bar code labels of each book directly which will update the selected STATUS automatically. This step is for marking attendance of the

collection available on shelves. <u>Here attendance of each Available Copy is marked manually.</u>

To update each copy, type the Accession No in the Accession No text box – on typing Record of the holding Record will be displayed with current status. Press ENTER to update/change status as selected from STATUS drop-down. In case, you have already update the status of any copy – it will display the message –"Already updated", however, u can update again just by pressing enter.

STEP 4: Generate the Report and Get the PRINT of the **Un-Traced b**ooks.

<u>NOTE</u>: Those holding records in the above Grid without any status under SV column will be treated as Un-Traced copies.

Print the List of Un-Traced Book

To print the un-traced book enter the YEAR and press the button 'Get Un-traced Book' then press GENERATE REPORT button
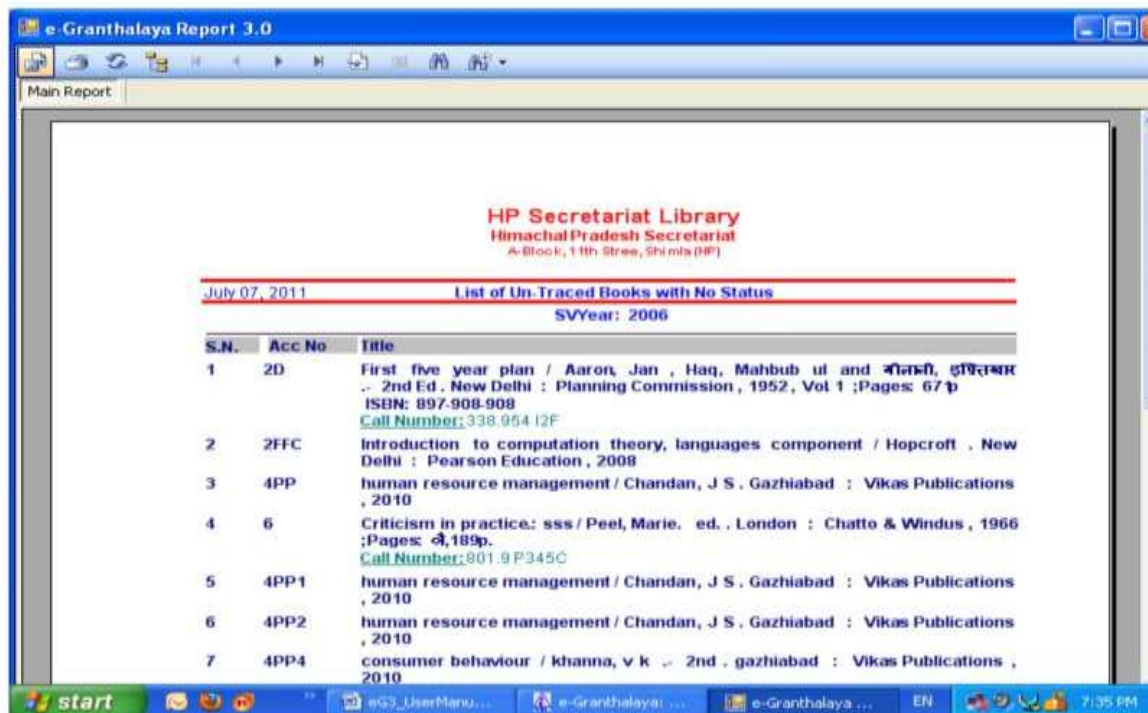
7. Generate BAR CODE Labels

This Form is used to Generate the Bar Code Labels and to Print the same either on **Bar Code / Thermal Printer** or on **Laser Printer**. In case, you want to print the barcode labels on Bar Code printer, then you need to send us **PRN File** for that particular make/model of printer to integrate it with the e-Granthalaya Software. The PRN file is a text file which contains the programming code / settings for each printer. The PRN File may be get from Vendor once you finalize the lables of your choice from vendor. The barcode labels prints the Bar code lines from accession number and Class No, Book No, Location, Library Code etc. A typical bar code labels contains the following data:

Library Code
Bar Code lines of the Accession no
Accession no
Class No
Location

Print Label on Laser Printer
Bar Code labels can also be printed by **Laser Printer** on the A4 Size Sheets where blank bar code labels are pasted in various rows and sized. We have already added various sizes for laser printer. Such A4 Sheets with blank labels are available in the market
    1. Select the size of barcode label from the drop-down
    2. Click 'Print BarCode Label on Laser Printer' button
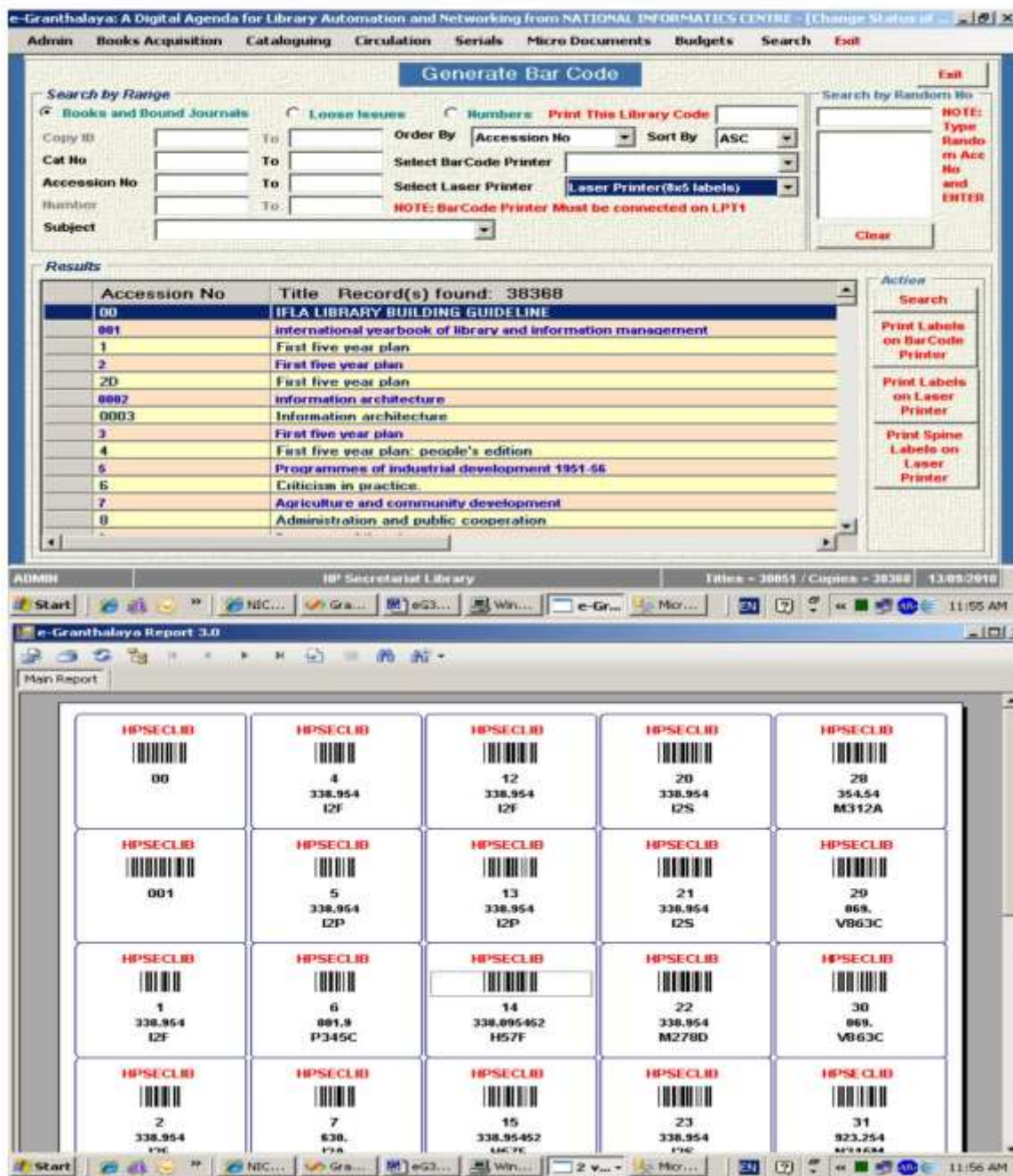
<u>NOTE</u>: Before printing BarCode Labels on Laser Printer, First install the Two Barcode
Fonts in the PC. These Barcode fonts are available in the eG3 CD and on
http://egranthalaya.nic.in web site. To install the barcode fonts, right-click the fonts and
select the option 'INSTALL' – it will install the fonts. Now you are ready to print the
labels.

Print Label on BarCode Printer
To print the bar code labels, first display the records by pressing SEARCH button and
then select the Bar Code Printer / Laser Printer and press appropriate PRINT button. It
will send the output to the laser printer or will generate the output report on the screen

and send it on the laser printer. Quality of the bar code labels must be checked by bar code reader before pasting on all the cooks. You can generate SPINE LABELS also on the same form.

How to Add BarCode Printer: Plz read the First Chapter of the User Manual.

BARCODE PRINTER ON USB PORT

Now a days all barcode printers are coming with USB port and not with LPT port. In this situation, when you will give print from eG3 and if your barcode printer is attached on USB Port then Print will not come. Solution of this problem is that after installation of barcode driver you need to do SPOOLING of both the ports. To do spooling, right click the barcode printer icon from List of Printers/Devices in control panel >> go to Printer Properties >> go to PORTS >> select check box option from bottom on the same screen – 'Enable Spooling' and apply. Put check box of LPT1 as well as USB port on which printer is attached and press APPLY. Once spooling is done then test the print of labels from eG3. Sometimes both the ports spooling is not saved – in this case remove the first check box and select 'Enable spooling only and apply then select first check box and apply again.

Chapter 6
Circulation Module

This module is used to automate the Circulation Desk activities and services such as making membership, issue and return of the documents, generating over due reminders, etc. The module permission can be set using the USER form under ADMIN module.

There are various menu under this module which are given below:-

Add Member Groups/Faculties/Division/Categories of the Parent
organization Add Designations / Sub-Categories
Register Members
Issue / Reserve
Return / Renew
View Circulation Transactions
Generate Over due notice
Import Members Data
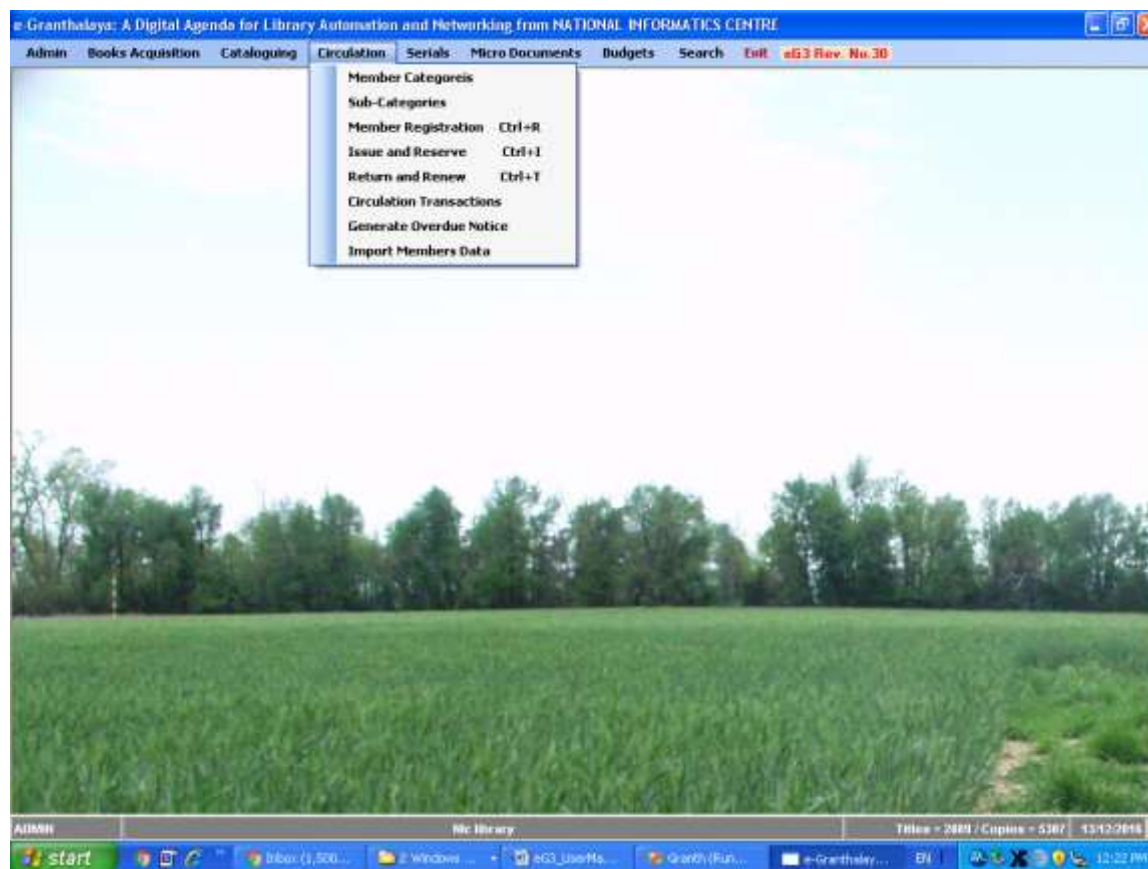
1. Add User Categories (GROPUPS / FACULTIES / DIVISIONS)

Search / View the Groups / Faculties / Divisions

This form is used to add/edit/delete/view/print all the Groups/Faculties/Divisions exist in the Parent organization to which library is serving. In case of Government libraries, divisions, in case of Academic libraries, Faculties are the main elements which can be added here.

On first screen load, all the existing records will be shown in the Data Grid as in the above screen. These records can be retrieved/filtered further using the text fields visible on the screen and pressing the RETRIEVE button. Categories May be, e.g. in school/College Libraries:-

    Teachers
    Non-Teachers
    Students
    Admin

Add New Records

To add the new Category record, follow the steps given below:-

1. Click the "Member Categories" menu from the CIRCULATION module
2. Press the ADD NEW button to activate the fields
3. Enter the data in the corresponding fields
4. Press SAVE the record
5. The field(s) in Red color is/are mandatory
6. ID field is system generated, automatically filled on saving the new record
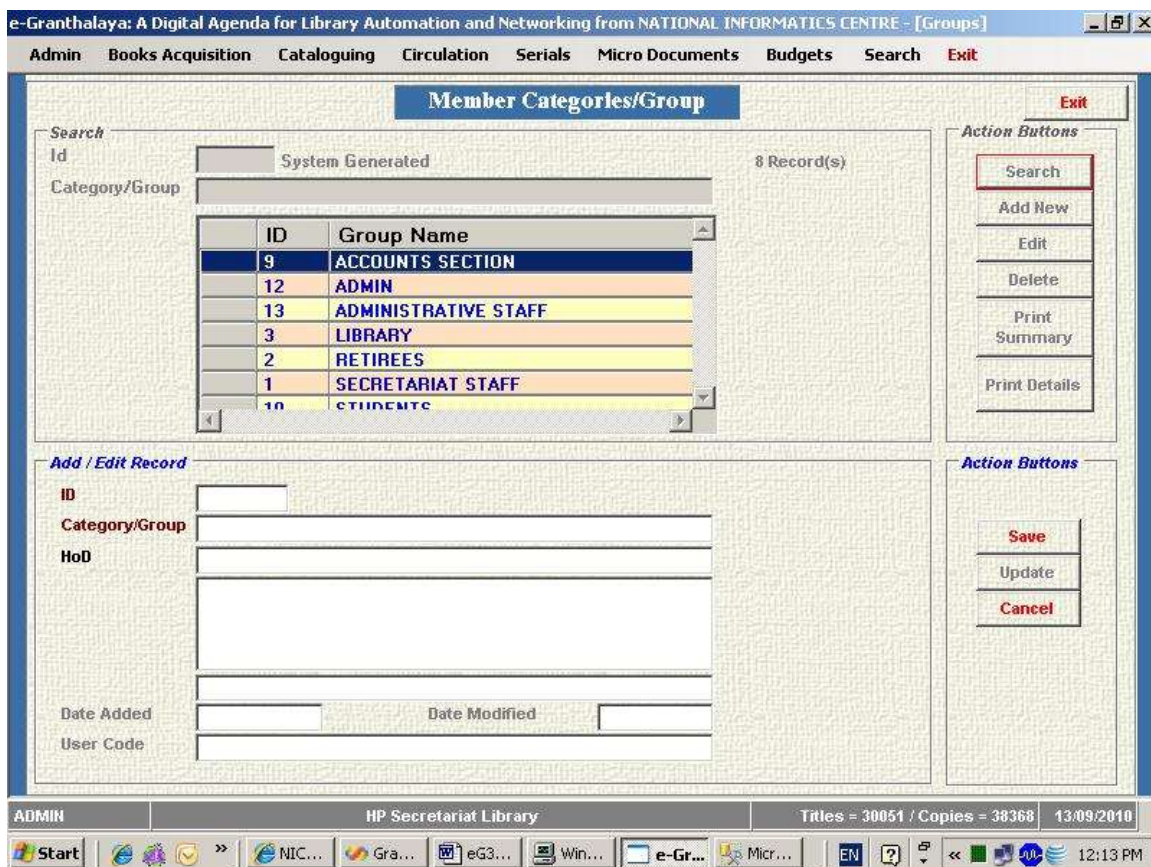
NOTE: In this way user can all the divisions/section, etc. in the database. ID field is automatically filled.

Edit Record

To edit the desired record, do the following steps –

1. Select the desired record from the Data Grid by clicking the mouse on the left side of the record in the grid
2. Press EDIT button to activate the fields
3. Re-write / over write the contents

4. Press UPDATE button to save the changes
5. Confirm the updation by pressing the YES option

Delete Record

To delete the existing record, follow the stpes:-

1. Select the desired record from the Data Grid by clicking it .
2. Press the DELETE button
3. confirm the deletion by pressing YES button

NOTE: Records can be deleted one at a time. Before deleting the record, first delete all the references (relationships) of the record from the database

Print Record

The report can be generating of the existing record by pressing the PRINT button. There are two option for print – one is summary and another option is details.
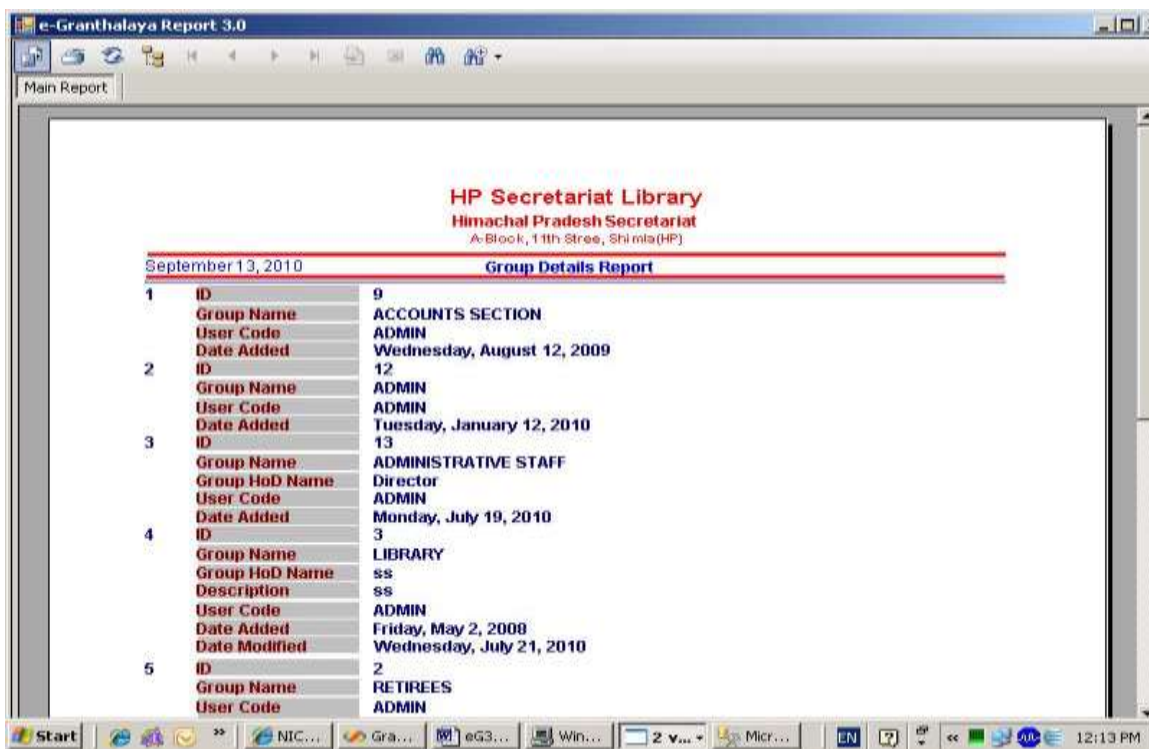
2. Add Member Sub-Categories (DESIGNATIONS)

In an organization, there may be various designations and categories of the members which can be entered here. . Sub-Categories may be:
Primary Teachers, TGT, PGT (For Teachers in School)
Lecturers, Ass Professors, Professors (I Colleges)

Students Class/Grade: Class X, XI, XII.
NOTE: On passing of student, just update the student sub-category only

Display/Retrieve Records

The existing records in this form can be viewed in the Data Grid on accessing the form. To access the form, first click the "Designations/Categories" menu from the CIRCULATION module.
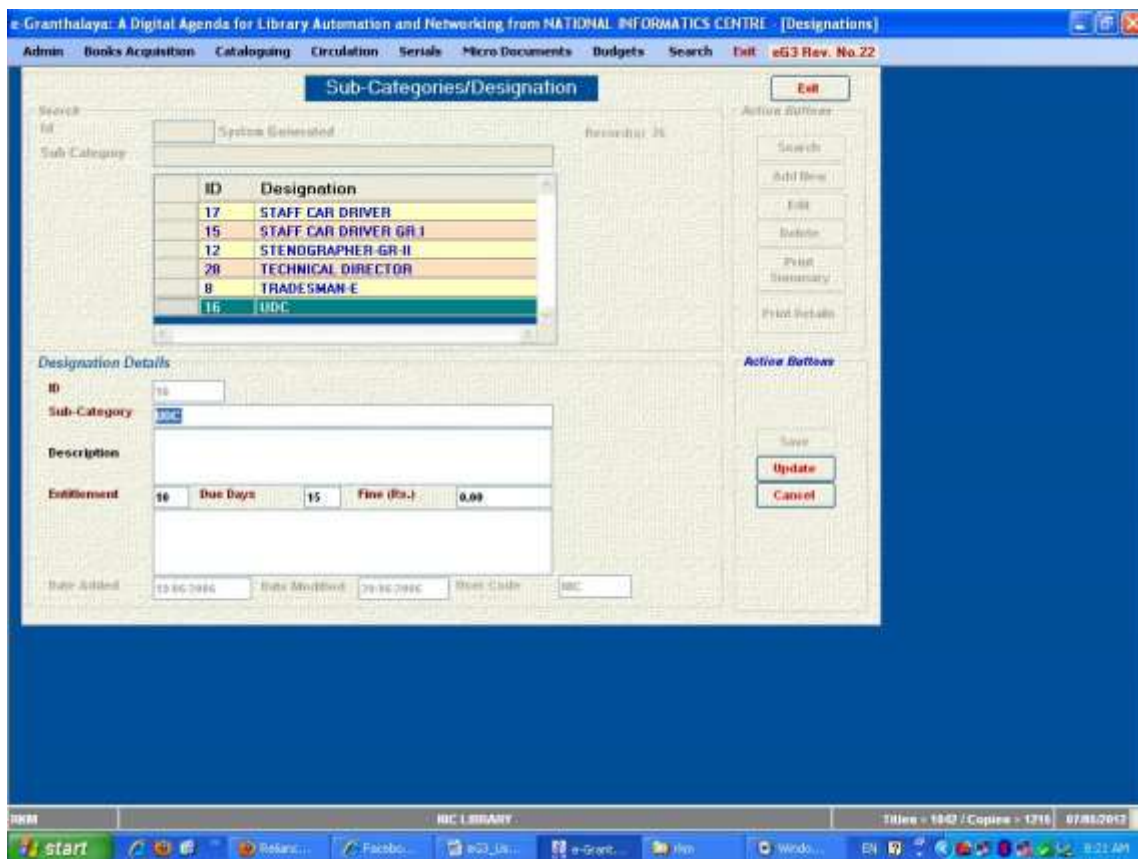
The existing records can be retrieved on the basis of inputs from the available fields and by pressing the RETRIEVE button.

Add New Record

To add the member categories and designations, follow the steps:-

1. Press the ADD NEW button to activate the new and blank form
2. Type the contents in the corresponding fields

Fields	Type	Meaning
ID	System generated, filled automatic on saving new record	

NAME	Name of the Categories/Designations
ENTITLEMENT	No. of documents will be issued to this category (numeric)
DUE DAYS	For no. of days, documents will be issued (numeric)
FINE	Rupee(s) fine every day (Currency)

3. The fields in Red are mandatory
4. Press SAVE the record

Edit Record

This option used to edit / modify the existing record, by following the steps given below:-

1. Click the desired record by selecting it from Data Grid
2. Press EDIT button to activate the fields
3. Re-write / over write the contents
4. Press UPDATE button
5. Confirm the updation by pressing YES button

Print Record

The existing record can be printed either in Summary or in Details depending the print option you selected. To generate the report, press PRINT button and wait for the report generated on the screen.
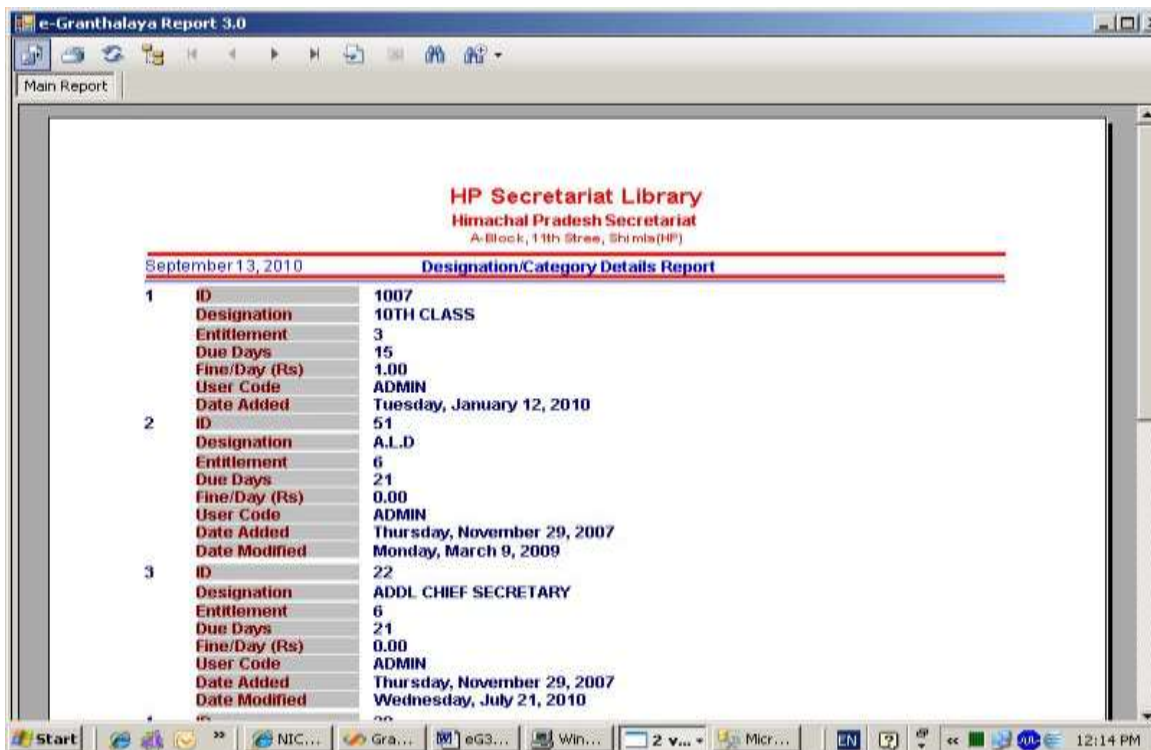
3. Member Registration (Add Member Records)

This form is used to add/edit/delete/print/retrieve the Membership Records to whom books will be circulated. To access the form, click the "Membership Record" menu from the CIRCULATION module. On display of the form, existing member records will be shown in the Data Grid as given in the below screen:

Display / Retrieve Member Records

The existing member record can be searched and displayed to view the details using the following steps:-

1. For searching the desired record(s), type the string/value in the fields enabled on the screen
2. Press the RETRIEVE button.
3. To display the desired record, select it from the Data Grid and press EDIT, full record will be displayed.

Add New Record

To add new member record, follow the steps:-
1. Press ADD NEW button to activate the new and blank form
2. Type the contents in the corresponding fields
3. Fields in Red color are mandatory
4. Press the SAVE button to save the record

Field	Meaning	Nature

ID	System generated, filled automatically on saving new record
MEM NO	Unique no., user defined, alpha-numeric, 50 chr length
CATEGORY	Select from drop down (more can be added using GROUPS/DIVISION form in the current module)
SUB-CATEGORY	Select from drop down (more can be added using DESIGNATION / CATEGORIES form under the current module)
GENDER	Select from the drop down
OVERDUE	Select from drop down (YES means circulation rules will be over-ride for this member, NO means no)

ADMISSION DATE: Date of Entry/Admission (Format = dd/MM/yyyy)
CLOSING DATE   Retitirement/Leaving the organization (dd/MM/yyyy)
SUBJECT /KEYWORD These are used for SDI service
AGE   : Age of the Member

NOTE: no circulation transaction will be done beyond these two dates by the Software. Date must be entered in dd/MM/yyyy format. Fields in RED color are mandatory.

How to set the PASSWORD of the Member

In case any library member wants to access the online services of the library using Web OPAC, then library needs to CREATE a member Password. For create/reset the password, press EDIT button to edit the member record and press RESET PASSWORD button. Enter the password and SAVE it and mail/inform the member his/her password. Password can be sent to member in his/her mail.
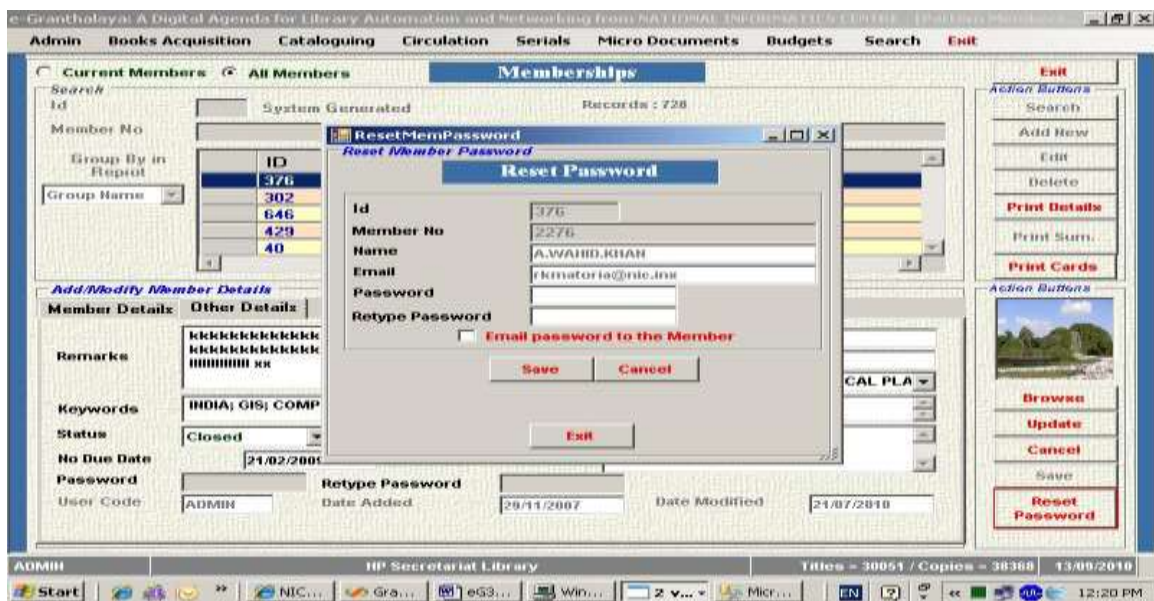
How to Add Member Photo

To add member photo to the individual record (during the Add New or EDIT process), press the BROWSE button, select the photo/image file (jpg image) and SAVE/UPDATE the record

Edit Member Record

To edit the existing member record, follow the steps:-

1. Click the desired member record from the Data Grid
2. Press the EDIT button
3. change / over write the contents
4. Press UPDATE button
5. Press YES button to confirm the up-dation

Delete Record

Member record can be deleted by selecting the desired record from the Data Grid and then by pressing the DELETE button. Press YES button to confirm the deletion.

NOTE: Member record can only be deleted if no circulation transaction exists for that member. So first search member circulation history in SEARCH TRANSACTION FORM and DELETE these records, then delete the Member Record. In case, any BOOK is issued to him/her, first RETURN the copy and delete the Transaction. Also, you must remove all the references of the member in Acquisition Records if he/she has recommended any book for purchase.

Print Member Records

Reports can be generated (summary of Detailed) by pressing the PRINT button. On generation of the report, this can be printed or saved in the hard disk.
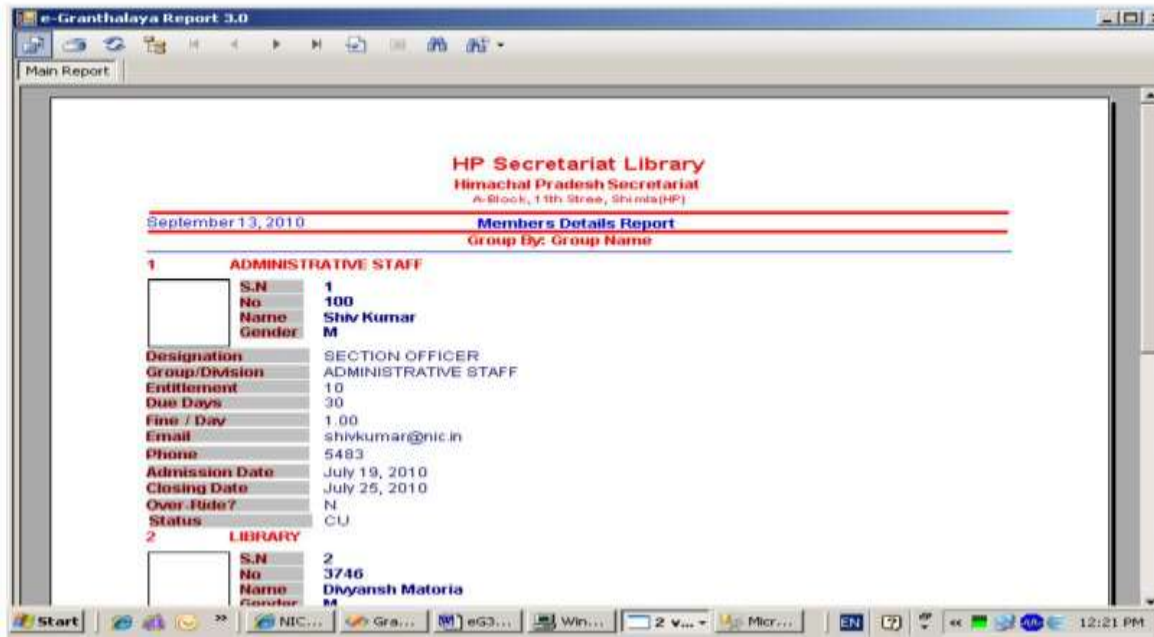
NOTE: each and every library member must be assigned a unique MEMBER NUMBER for ever

Print Member Cards

Member Cards can also be printed in e-Granthalaya just by pressing the PRINT CARDS button.
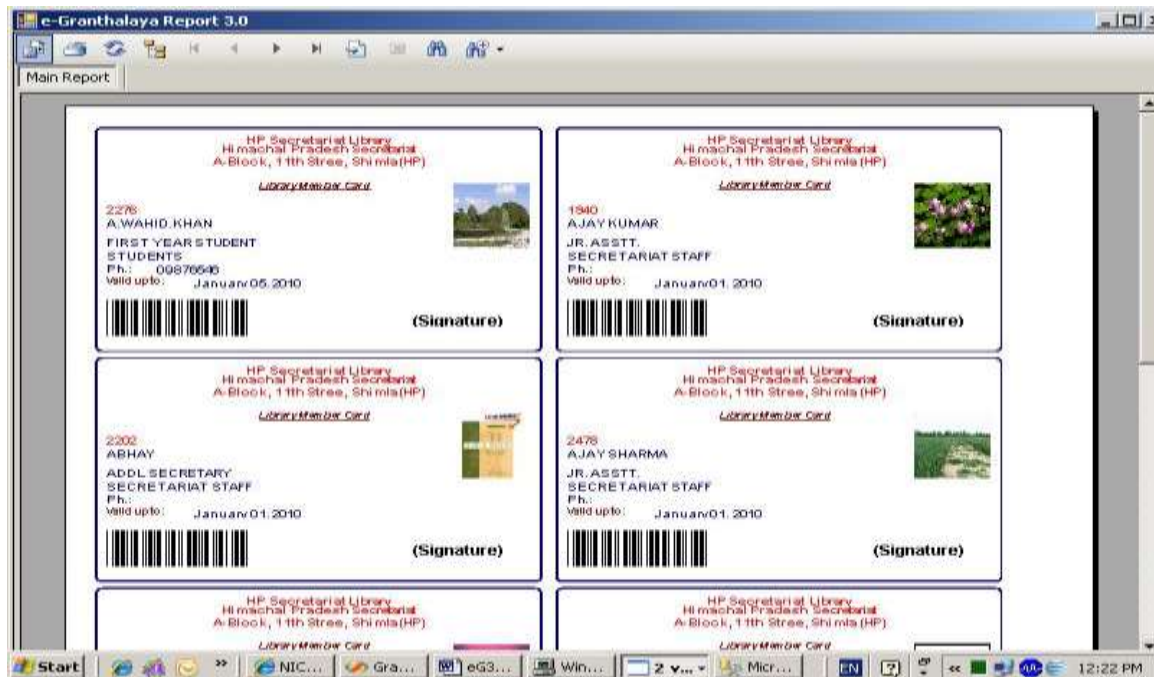
PRINT MEMBER BARCODE LABELS

Now you can print the Member No as Barcode Labels just by pressing the button – Generate Member Barcode – before pressing this button u need to select the size of the barcode labels from the drop-down given on the form. Once u select the size and press the button – barcode labels for member no will be generated on the screen which u can take print over A4 size of sheets.
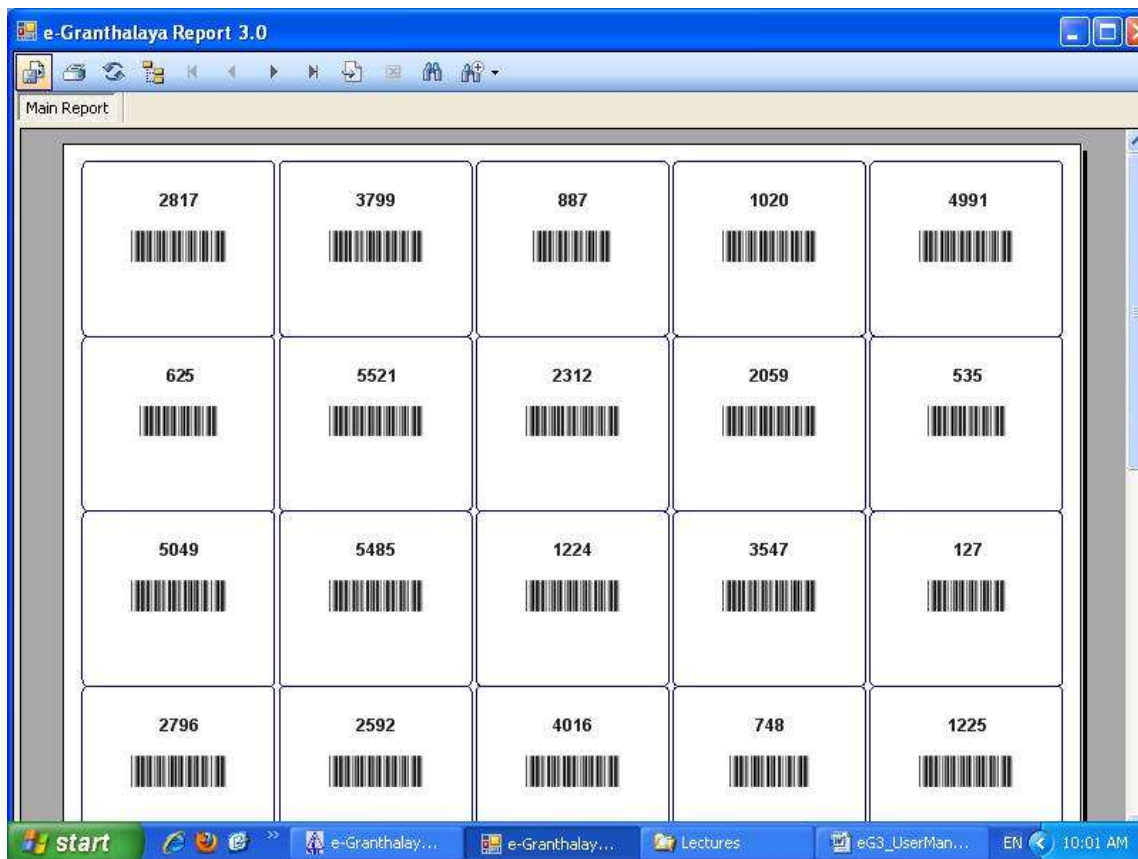
4. ISSUE and RESERVE

This form can be used to issue the library documents to the library members entered using the member form in the current module. The process of *Issue and Reserve* is similar and is very important for a library. Before issuing the book, please verify the identity of the library members.

The form can be accessed by selecting the "Issue/Reserve" menu from the CIRCULATION module. Three kinds of documents can be issued on this form i.e. Books, Loose Issues, Bar Code given on the form. On first access, following screen will appear:-

Issue / Reserve the Document

To issue or reserve the document, follow the steps:-

1. Type the "Membership No" in the field on the left top corner
2. Press TAB or ENTER button from the keyboard
3. Select the option button given on the top portion of the screen:-
   a. Books / Bound Journals
   b. Loose issue of the Journals
   c. Bar code number (if generated using BAR CODE field in the Database. If bar code is generated using ACCESSION NUMBER , then select first option i.e. Books/Bound Journals
4. Type Accession Number in the ACCESSION NO field
5. Press ISSUE or RESERVE button

NOTE: IF ISSUE / RESERVE button is not enabled, it meant that :-
   i. either the book belongs to "Reference" collection
   ii. book status in not "Available"
   iii. Member quota has been exhausted
   iv. Member date expired

NOTE: In case, you want to issue the "Loose Issue" of the journal, then select the option "Loose Issues" given on the top portion of the screen in Green color. Then type the loose Issue ID (Loose Issue ID is generated by system automatically while receiving the issues using SERIALS module.), press the ISSUE/RESERVE button.

NOTE: The issue/reserve function is BAR CODE enabled where bar code reader can be used to perform these functions.

NOTE: While issuing the record, when you type the Member number in the field, if some books are OVERDUE, then messages are flashed during the circulation process.

How to Print Gate Pass or Send the Mail

On Successful Issue of the book, you can print Gate Pass for every issue of one Gate Pass for all the issues in one day. To get the Gate pass, select the check box from the bottom of the screen.

How To Send EMAIL on Each Issue

Before issue, select the Send Mail option from the bottom of the form to send the mail to member. However, you must save the email id of member in his/her record. Also, you must set the email account in Microsoft Outlook.

5. RETURN and RENEW

This form is used to "Return" the Issued documents. To hook the form, click the menu "*Issue / Return*" from *CIRCULATION* module, a blank form will appear which you can use for Return of the documents.

How To Return

To return the issued document (books, bound volumes of journals , loose issues of the journals), follow the steps:-

1. Select the appropriate type of document from the Radio button given on the top of the screen in Green color
   a. Book/Bound Journal (also for the Bar Code, if generated on Accession No)
   b. Loose Issues of the Journals
   c. Bar Code (when Bar code is generated on the field BAR CODE (and not on Accession No.)
2. Type the Accession No. of the book to be returned in the field ACCESSION NUMBER .
3. Press TAB or ENTER from keyboard
4. Check the fine to be collected, if any
5. Press RETURN button

NOTE: You can use bar code reader to return the document. One document will be returned at a time, one by one.

NOTE: While returning the copy, you can send the email to the member by selecting check box from the bottom of the form.

How to Generate RECEIPT for overdue / Fine

While RETURN of the copy, if FINE is there, u can receive the fine and can print the RECEIPT on this form. If FINE is there, press the RECEIPT button to save the data / fine etc. Once you saved the form then you can print the receipt. Later, all the receipts/fines can be managed in 'Receipt Manager' in ADMIN module.

How to send SMS while Return of the Book

You can send SMS to the member mobile no while returning the book just by checking the option of SMS given on the bottom of the form. However, first you must subscribe the SMS Service from any SMS provide and must set the SMS account details in the SET DATABASE CONNECTION FORM under ADMIN >> Database Utilities.

6. VIEW CIRCULATION TRANSACTIONS

This form is used to *view the circulation transaction done in the library*. The circulation Transactions shows the details of various kinds about the transaction. The transactions can be filtered based on various inputs available on the screen as given below:-

1. Based on Materials Type
2. Accession No (in case of Books/bound Journals) and Loose Issue ID
3. Library Member
4. Library Staff
5. Book Circulation Status wise (Issued/Returned/Reserved)
6. Designation/Categories wise
7. Group wise
8. Date Wise
9. In various Combination

How to Search

1. Type Search String in any of the fields given on the screen
2. Press Search button
3. Results will be shown in the Data Grid
4. You can print the results by pressing the PRINT button

You can also print the following reports on this form:

     a.   Print Summary
     b.   Print Details
     c.   Top borrowers
     d.   Most Used Books
     e.   View All Overdue as on Today (or with n no of days in advance)
     f.   Send Reminders to all vi email
     g.   Print Reminder for all with single click

7. GENERATE OVER DUE NOTICE

This form is used to generate the "Over Due Notice" or "Reminder" to the library member to request them to return the books in the Library. The Over due notice will be generated to the individual member, one by one, however, the overdue books can be seen in group.

    To generate the Over Due Notice, follow the steps:-

1. First you must add the Text Message for Over Due Notice, once for all time, using the "Messages and Text" menu under "Master Data" in ADMIN module
2. This text message will be inserted automatically in the overdue notice
3. To generate the overdue notice for a specific member, type the "member Number" in the field "MEMBER NO"
4. Press TAB from the keyboard
5. The list of overdue books will be displayed in the Data Grid (if any)
6. Select the "Text Message Form" from the drop down of "TEXT MESSAGE"
7. Press PRINT button
8. The report will be generated which can be saved to hard disk and printed direct

7. Import Members Data

This form is used to Import Members Data/Record from excel.

To Import the record, follow the steps:-

1. First you must browse excel sheet.
2. Excel sheet may have more than one sheet so select one by one sheet from the drop down. After selecting the sheet grid will be filled with the selected sheet.
3. Now do start field mapping, select the column name from drop down according to Your excel sheet. Do the mapping carefully otherwise your data will be imported in wrong manner.
4. Now press button "Import Records".

WORK FLOW OF CIRCULATION PROCESS
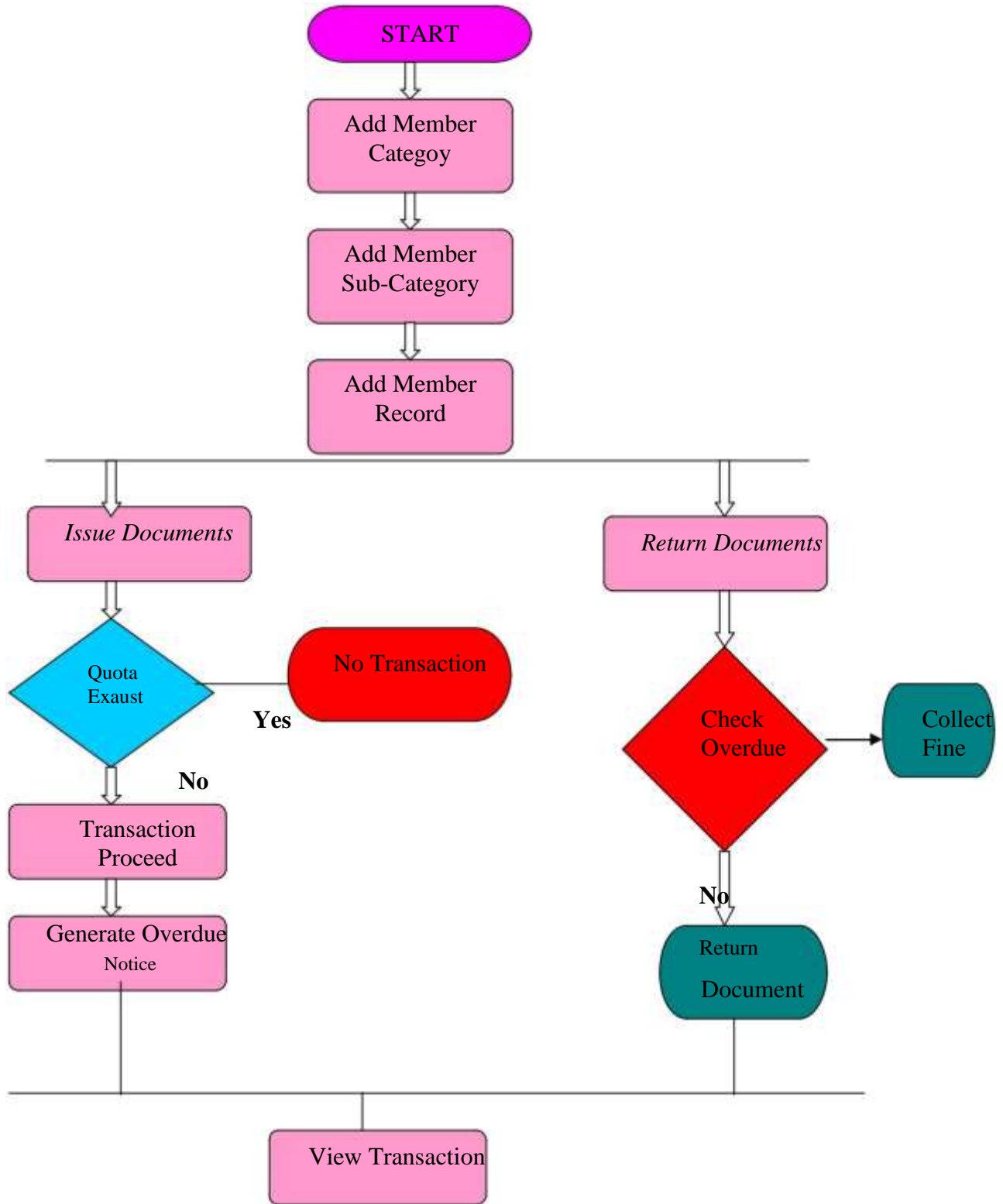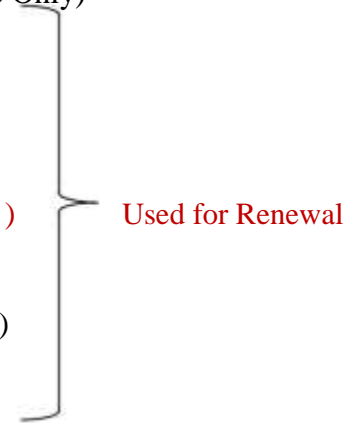
Chapter 7
Serials Module

This module is used for managing the "***Subscription to the Journals, Magazines and Newspapers***" in the Library. The process of subscribing is slightly different from purchasing the books in the Library.

While using this module, users are advised to follow the step by step process to complete the subscription, no menu should be skipped. The module contains the following steps and menu:-

1. Check Duplicate Title
2. Add New Journal – (First time Only)
3. Serial Start Details – (First time Only)
4. Subscription Start Details – (First time Only)
5. Add Acquisition Info – (Every Year)
6. Generate Approval (Every Year)
7. Update Approval (Every Year)
8. Add Order Info (Every Year)
9. Generate Order form (Every Year)
10. Subscription maintenance (Every Year)   Used for Renewal
11. Schedule maintenance(Every Year)
12. Receive Loose Issues(Every Year)
13. Generate Reminder (Whenever needed)
14. Add Billing Info
15. Add Payment Info
16. Update Journal History
17. Add Journal Holding (Bound Volumes of Serials)

NOTE: In case you want to automate the SUBSCRIPTION process, then you need to follow all the steps from 1 to 15 for the First Year for each Journal. Next year you can RENEW the subscription just by following Step 5 – 15

NOTE: In case you want to add JOURNALS HOLDINGS / Bound Volumes of the journal only, then just ADD NEW JOURANL (Step 2) and Directly go to step 17 to Add its Bound Volumes.
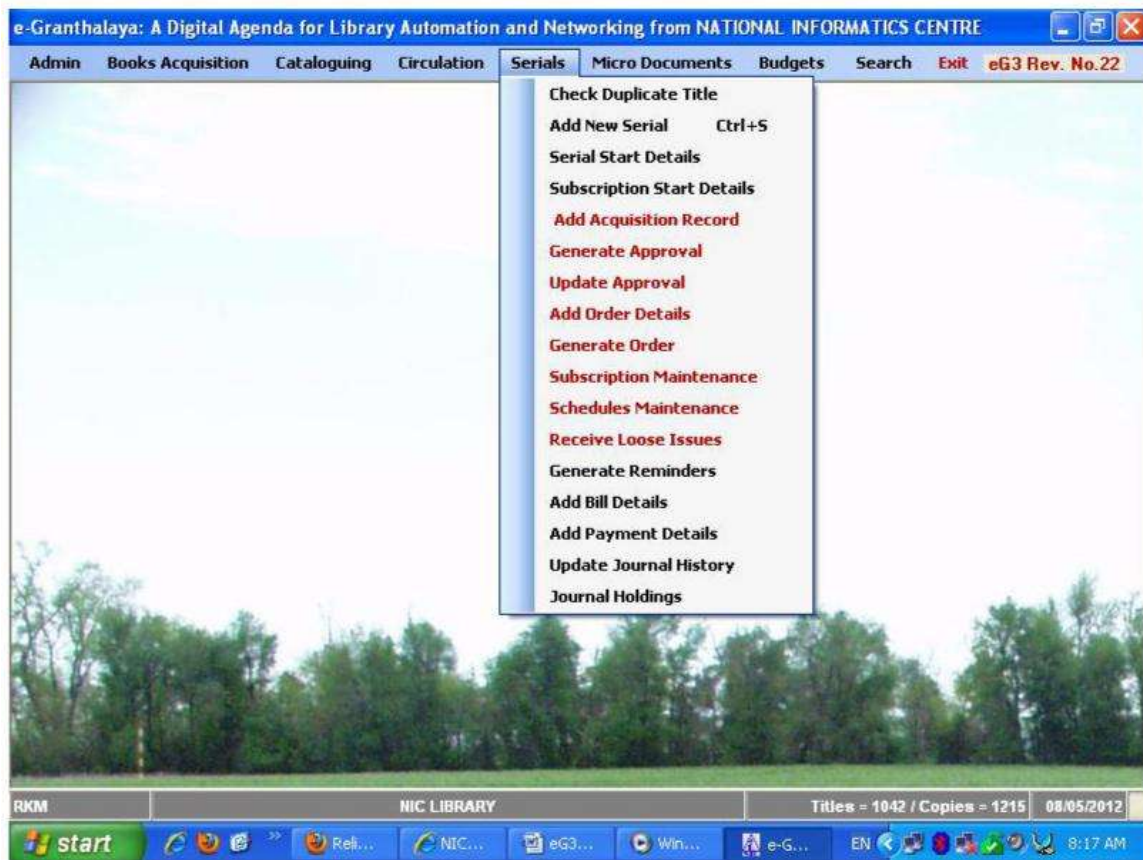
1. CHECK DUPLICATE TITLE

This form is used to check whether the journal title is already in the master database or not. To check the duplicate title follow the steps:-

1. Click the "Check Duplicate Title" menu from SERAILS module
2. On the form appear you can filter / search the journal title with the following three Fields:-
   - i.   ISSN
   - ii.   Title
   - iii.   Editor

3. Type the keyword / value in any of the fields and select the Boolean "Search Option" given on the form
4. Press SEARCH button
5. Result(s), if any, will be shown in the Data Grid arranged in alpha manner
6. Click the Title from Data Grid to view the details of the journal
7. You can do many things on this form depending on the "Action Button" available on the form as given below:-
   a. EDIT TITLE – you can edit the selected title
   b. ADD NEW ACQ INFO – you can add new Acquisition Record to start the subscription for the year

c. PRINT SUMMARY – To print the summary of the results
d. PRINT DETAILS – To print the details
e. PRINT THIS RECORD – To print the Acq and Holdings details of the selected title
f. BOUND VOLUMES – To view the bound volumes of the selected title
g. LOOSE ISSUES – To view the loosed issues received for the title

2. ADD NEW JOURNAL

This form is used to add new journal details, once for all, for the first time. The journal details can be taken from the sample issue of the journal or from the catalog. The form can be accessed by selecting the menu "**New Journal**" from the SERAILS module. Following screen will appear:-

Add New Title

To add new title follow the steps:-

1. Press the "ADD NEW: button to activate the fields
2. Add the data in the corresponding fields
3. Fields in Red color are mandatory

4. Add ISSN number
5. Press TAB to jump to the next field
6. wherever value is available in the Drop Down, select the value from drop down
7. ***In case value is not available in the drop down***, press the corresponding buttons to add the new Publisher, Subject, country – add the value by pressing the ADD NEW button , save the value by pressing the SAVE button , exit the form and come back to the same form i.e. Add New Journal title
8. In case desired value is available in the drop –down , there is no need to do the action given in the step no.7
9. Press SAVE button
10. On saving the new record, a unique CAT NUMBER will be generated automatically
11. Thus, you have added new journal title
12. Fields in RED color are mandatory.

NOTE: Reference field can be used for local use. USER, DATE ADDED, DATE MODIFIED, CAT NO fields are system generated, these are locked while adding the new record

NOTE: On this form, PUBLISHER Name if not available in Combo then it can be added direct here in the Combo (no need to add in Master data as was done earlier)- it will be saved in the Master Table automatically. Also add Place and Country of the Publisher in the same form.

Edit the Record

To edit / modify the existing journal record, please follow the steps given:-

1. First, display the Journal Record to edit, by typing the ***Cat Number*** in the CAT NUMBER field
2. If you forgot the cat number, search the desired title by typing the keyword in the SEARCH field, and pressing the RETRIEVE button
3. Once you display the Catalog Record of the desired title, press the EDIT button to activate the editing
4. Re-write / over write the contents and press UPDATE button
5. Confirm the updation process by pressing the YES button
6. To add/edit/delete the Cover Photo of the journal (while editing), press the BROWSE button and select the GIF file from the hard disk

Delete Record

The existing record can be deleted from the database, if all the references have been removed, by following the steps:-

1. Display the Title Catalog Record by typing the Cat Number in the field CAT NUMBER or by pressing the RETRIEVE button
2. Once you display the desired Record, press DELETE button
3. Confirm the deletion process by pressing the YES buttn

NOTE: If any reference or child records or relationships exit, no Catalog Record will be deleted

Print Record

To print the details of the journal, first display the Catalog Record of the journal by typing the Cat No in the CAT NUMBER field or search the desired title by pressing the RETRIEVE button.

Once you display the Catalog Record of the desired title, press PRINT button to generate the report. Once report is generated, it can be saved to hard disk or print on printer.
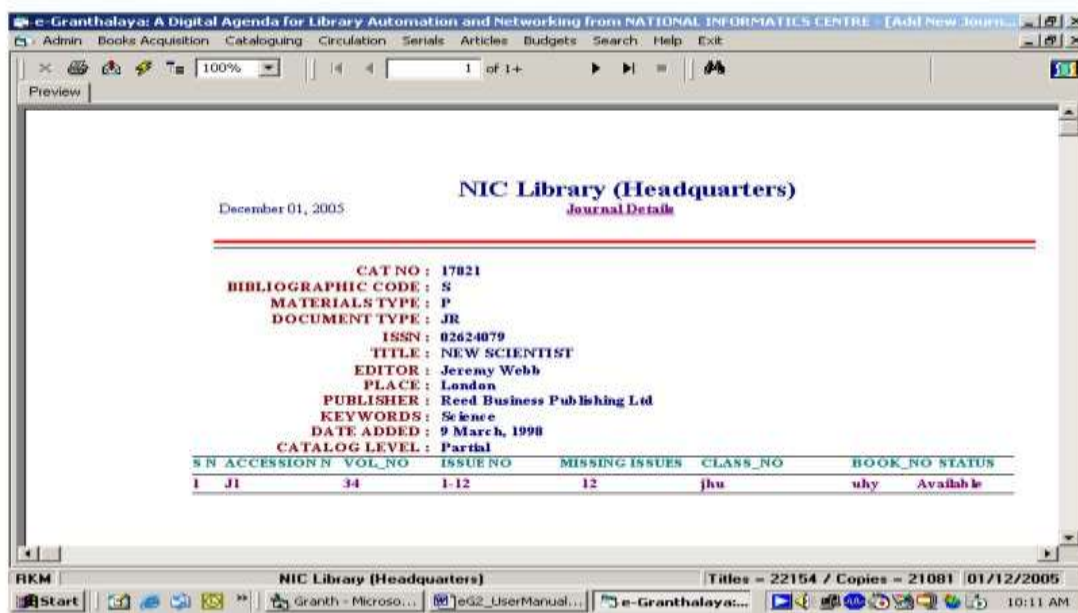
3. SERIAL START DETAILS

This form is used to add the start details (*Journal Start Info*) of the new journal when the publication of the journal was started in the world. Such data can be get from journal issue or from 'Ulrich Directory of Periodicals'.

Add Record

To add the details of the new journal, follow the steps:-
1. Select the menu "Serial Start *Details*" from the SERIAL module
2. Display the Catalog Record of the desired journal either:-
    a. By typing the *Cat Number* in the CAT NUMBER field or
    b. Press the SEARCH button to populate all the journal titles in the drop down given against TITLE or
    c. Select desired title from the drop down
3. Press TAB from the keyboard to display the Catalog Record of the selected journal
4. Once you displayed the Catalog Record of the journal in the top part of the screen (in Journal Information part), you are ready to add the details of the journal
5. Press ADD NEW to activate the fields
6. Add the contents :-
    a. CODEN – printed on the journal
    b. START VOL – when the Title started first (volume no)
    c. START ISSUE – Start Issue no
    d. FREQUENCY – Select start frequency from the drop down
    e. START YEAR – numeric year in "yyyy" formt
    f. FULL TEXT – say Y /N (yes or No)
7. Press SAVE button to save the record

NOTE: No field is mandatory on this form.

Edit the Record

To edit the Record, follow the steps:-

1. Display the Catalog Record of the desired journal either
   a. By typing the *Cat Number* in the CAT NUMBER field or
   b. Press the SEARCH button to populate all the journal titles in the drop down given against TITLE
   c. Select desired title from the drop down
2. Once you display the Catalog Record of the desired journal, then "Journal Start record" is also displayed in the bottom part of the screen (in case no record exist for "Journal Start Info", then first add new record by following the steps given in the previous heading)
3. Pres the EDIT button to activate the fields
4. Re-write /over write the contents
5. Press UPDATE button to save the changes

4. SUBSCRIPTION START DETAILS

This form is used to add the subscription start details and CLOSE details in a library of the new/existing journal. This details is entered once for every journal title during first year of subscription. In case subscription is Stopped then you can update the same record with stopped tag/details. You need to create a new records for each journal title just be pressing ADD NEW button

Add Record

To add the details of the new journal, follow the steps:-

8. Select the menu "Subscription Start *Details*" from the SERIAL module
9. Display the Catalog Record of the desired journal either:-
    a. By typing the *Cat Number* in the CAT NUMBER field or
    b. Press the SEARCH button to populate all the journal titles in the drop down given against TITLE
    c. Select desired title from the drop down
10. Press TAB from the keyboard to display the Catalog Record of the selected journal
11. Once you displayed the Catalog Record of the journal in the top part of the screen (in Journal Information part), you are ready to add the details of the journal
12. Press ADD NEW to activate the fields
13. Add the contents :-
    a. Subscription START VOL – when the Title started first (volume no)
    b. Subscription START ISSUE – Start Issue no
    c. Start FREQUENCY – Select start frequency from the drop down
    d. Subscription START YEAR – numeric year in "yyyy" format
    e. SUBSCRIBED – say Y /N (yes or No) – Mandatory Fields. In case you want to subscribe the journal put Y.
14. Press SAVE button to save the record

Edit the Record

To edit the Record, follow the steps:-

6. Display the Catalog Record of the desired journal either
    a. By typing the *Cat Number* in the CAT NUMBER field or
    b. Press the SEARCH button to populate all the journal titles in the drop down given against TITLE
    c. Select desired title from the drop down
7. Once you display the Catalog Record of the desired journal, then "Journal Start record" is also displayed in the bottom part of the screen (in case no record exist for "Journal Start Info", then first add new record by following the steps given in the previous heading)

8. Pres the EDIT button to activate the fields
9. Re-write /over write the contents
10. Press UPDATE button to save the changes

NOTE: In case subscription of the journal is stopped then UPDATE the Record accordingly

RENEWAL OF SUBSCRIPTION WILL START FROM HERE EVERY YEAR

4. ADD ACQUISITION INFO

This form is used to *Start the Process of Subscription* by adding the *Acquisition Record* of the journal title to be subscribed. This is similar to the process of books purchase. On this form, user can add / edit /delete / print the Acquisition Record(s) of the desired journal

NOTE: This process of adding new Acquisition Record is done every year on annual basis, it means one Acquisition Record is added every year for a specific journal title.

The form can be accessed by selecting the menu "Acquisition Info" from the SERIAL module.

Add new Acquisition Record

Mandatory Fields:
> *APP NO – List No / must be Unique for each case*
> *Subscription Year in yyyy format*
> *No.of Copies*
> *Acqustion Mode*

Please follow the steps:-

1. Display the ***Catalog Record*** of the journal either by typing the Cat No in the CAT NUMBER field or by selecting the desired title from the drop down menu after pressing the button SEARCH
2. After selecting the title from drop down, press TAB key or ENTER from the keyboard
3. On display of the title details in the top portion of the screen, the existing Acquisition Records is/are displayed (if available) in the lower part of the screen
4. To add new Acquisition Record, please press ADD NEW button to activate the fields
5. Enter the data in the enabled field and / or select the data from drop down menu wherever available
6. The fields in Red color are mandatory
7. APPROVAL NO field is unique, it means that a unique Approval Number must be entered in this fields, which has been used earlier.
8. Approval date must be in "dd/MM/yyyy" format
9. subscription fields must be in "YYYY" format
10. Press SAVE button to save the new record
11. In case you want to edit/modify the acquisition record, you can do it by pressing the EDIT button
12. On addition of the new Acquisition Record, the Process Status will be "Requested"

NOTE: Approval Number is just like an approval list where you can assign a numeric value i.e. 1.2.3 ….n. However, you can also use the file number in standard manner.

NOTE: While creating the Acquisition Records for many journals in order to take approval in group for a particular year, it is suggested to assign the SAME approval number to all the titles. Once you process the Approval Number then you can not add more acquisition Record in this number.

Edit the Acquisition Record

To edit the existing Acquisition Record of the Journal, follow the steps:-

1. Display the parent record i.e. **Catalog Record** of the desired journal either by typing the Cat Number in the CAT NUMBER field or you can select the title from the drop down menu after pressing the SEARCH button.
2. After selecting the title from the drop down, press the TAB or ENTER key from the keyboard
3. After displaying the Catalog Record in the upper portion of the screen, Acquisition Record(s) will be displayed in the lower portion of the screen.
4. In case there are more that one Acquisition Records belong to the same title, then you can scroll forward or backward these records by pressing the ARROW button.
5. Select/display the desired Acquisition Record which you want to edit.
6. Press the EDIT button to activate the fields
7. Re-write /over-write the data
8. Press UPDATE button to save the changes
9. Press YES button to confirm the process of editing

NOTE: On this screen only Acquisition Records can be edited with the following Process Status:-

"Requested"
"Approved"
"Rejected"

NOTE: In case title is Rejected, you can put the title again approval by assigning the new Approval Number .

Delete Acquisition Record

To delete the desired Acquisition Record, from the database, follow the steps:-

1. Display the Catalog Record of the Journal title
2. Select the desired Acquisition Record by displaying it in the lower part of the screen
3. Press the DELETE button to delete the record

NOTE: Acquisition Record with "Process Status" Requested, Rejected will be deleted only. To delete Acquisition Record with rest of the Process Status, first remove all references and then delete the record

Print Acquisition Record

To print the Journal details along with Acquisition Record, first display the records on the screen and then press the PRINT button to generate the report on the screen. You can directly print the report or can save the report on the hard dsik

Add/ Edit Vendor Record

While adding / editing the Acquisition Record, you may need to add/edit the Vendor record in this form, for that press the "ADD/EDIT VENDOR" button, a new form will be appeared, Press ADD NEW , type the contents and SAVE the record. After Saving the new Vendor Record, press EXIT the button to close the form, again you will be on the same Acquisition form. Here you can select the newly added record of the Vendor from drop down.

5. GENERATE APPROVAL

This form is used to Generate the Approval List of the journal which will be sent
to the Approval Authority mentioned in the "Committee" . The approval list can be for
one title or form many titles in group.

To generate the Approval List, follow the steps:-

1. Select the "Generate Approval" menu from "SERIALS" module
2. Select the "Approval List" from the drop down
3. Press TAB key if required to display the list of titles included in the list
4. Select the Committee from the drop down
5. Press "Send for Approval" button to process the titles
6. Press the PRINT button to generate the report on the screen
7. Take print of the Report

NOTE" After this step, the Process Status of the Acquisition Record will be changed to
"Sent for Approval". Now, you can not add more new acquisition record in this approval
number.

6. UPDATE APPROVAL

Once you sent the "Approval List" to the Approval Authority, some of the titles may get approved while some other may get rejected, accordingly, now you have to update the status of the approval list.

To update the approval list, follow the steps:-

1. Select the "Update Approval" menu form the "SERIALS" module
2. Select the desired Approval list from the drop down menu
3. press the SUBMIT button to view the list of titles included in the approval list
4. Check the box ( ) given against the title in the left side (if the title is approved)
5. Leave the box unchecked if title is rejected
6. Type the number of copies approved (numeric)
7. Press UPDATE button to process the records

NOTE In case, you need to scroll down the screen to view the complete list of titles, press the Vertical Scroll Bar given in the Right side

7. ADD ORDER INFO

This form is used to add Order info to the Acquisition Records which have been Approved by the Approval Authority i.e. Library committee. The Order Info includes the Name of the Vendor to whom Order will be placed, Order Number, Order Date, etc.

The Order form can be accessed by selecting the *"Add Order Info"* from the SERIALS menu, following screen will appear where you can add the order Info after displaying the records:-

How to Add Order Info

To add the order info, the status of the Acquisition Record must be "Approved" or "Ordered". Follow the steps to add order info:-

1. Display the Catalog Record (Title Details) in the upper part of the screen either by typing the CAT NUMBER in the Cat Number field and then press SEARCH button or TAB key.
2. In case you do not know the exact Cat number, press the SEARCH button to populate the list of journals in the drop down
3. Select the desired Title from the drop down and press TAB key from the keyboard

4. On pressing the TAB key, Catalog Info will be displayed in the upper part of the screen
5. In case, there are Acquisition Record(s), this/these will be displayed in the Acquisition area in the lower part of the screen
6. Select /display the Acquisition Record to which you want to add Order Info
7. In case there are more than one Acquisition Record , you can go forward or backward by pressing the ARROW buttons
8. Once you display / select the desired Acquisition Record, press the ADD/EDIT ORDER INFO button to activate the fields
9. Enter the ORDER NO in the field, It must be unique and must be same in all the titles which you want to include in the same order
10. Enter ORDER DATE in the "dd/MM/yyyy" format
11. ORDER COPY must not entered in the designated field
12. Select the VENDOR name from the drop down, in case there is no the desired vendor in the drop down, you can add new Vendor by pressing the ADD/EDIT VENDOR. After adding the Vendor, press EXIT button to come out from the Vendor form , again you will be on the Acquisition form from where you can select the Vendor name.
13. Press SAVE button to save the record

NOTE: The nomenclature of the Order Number should be unique, and suppose you want to add ten titles in the same order, then you must assign the same Order no. in all the Acquisition Records. No space I allowed in Order Number.

Print the Acquisition Record

You can generate the Report for the title displayed by pressing the PRINT button which can be saved to the hard disk or can be printed on the printer.

8. GENERATE ORDER

This form is used to generate the ORDER which can be mailed to the Vendor. The form generate a report which can be printed on the printer. The form can be accessed by selecting the "Generate Order Form" from the SERIALS module. To generate the desired Order Form, follow the steps given:-

1. Select the desired *Order Number* from the ORDE NUMBER drop down and press SUBMIT button to list the titles included in the order
2. Click the Check boxes given in the left side against each title in order to include the title in the order
3. Enter the number of copy to be ordered
4. Press UPDATE button to process the Order
5. Later, you can display the order list again for generating the Print/Report
6. Press the PRINT button to generate the order report
7. Before generating the report, select the Form name (e.g. Order Form) from the drop down to include the text message in the order print

8. In case there is along list of titles in the order, you can browse the list by pressing the Vertical Scroll Bar given in the right side by clicking the tiny arrow sign in the right-bottom side.

NOTE: After processing the order, the Process Status of the Acquisition Record becomes "ORDERED".

9. SUBSCRIPTION MAINTENANCE

This form is used to add / edit /delete Subscription Info of the title for a specific year needed to generate the Schedule automatically. The Subscription info includes:

Subscription Year	=	yyyy (e.g. 2005)
Frequency	=	to be selected from the drop down (e.g. Monthly)
Vol/Year	=	No of Volume per year (e.g. 2)
Issue/Year	=	Total Issues per year (12)
Issue/Vol	=	Issues per Volume (6)
Start Vol	=	Start Volume of that year e.g. 23
Start Issue	=	Start Issue of that year e.g. 1
Start Date	=	Start Date of your Subs. period (e.g. 01/01/2005)
End Date	=	End Date of your Subs. Period e.g. (31/12/2005)
First Issue Date	=	Date of the First Issue in that year e.g. 01/01/2005

Issue Continue?   =   Y/N (Yes or NO)

How to add New Subscription Record

1. Select the menu "Subscription Maintenance" from the SERIALS module
2. Press the SEARCH button to populate all the titles in the drop down
3. Select desired Title from the drop down and press TAB key from keyboard to display the Catalog Record (journal details)
4. On display the Journal title in the top part of the screen, all the Acquisition Records are displayed in the Acquisition Info portion of the screen, one record for one year.
5. Select /display the desired Acquisition Record for the specific year by going forward/backward using the ARROW button on the screen
6. Press ADD NEW button to activate the fields in the Subscription Info area
7. Type the data as required in the corresponding fields
8. Use numeric data only wherever prompted
9. Use "dd/MM/yyyy" format for date
10. Press SAVE button to save the Subscription Record
11. This information goes to the SUBSCRIPTION table in the Database

NOTE: the information must be given appropriately otherwise wrong schedule can be generated for the year. First confirm the data from the past subscription and loose issues of the journal.

NOTE: The fields which are not enabled, you do not try to write anything in such fields.

<u>NOTE</u>: Next year on subscription Renewal, all the data will be updated automatically.

Edit The Subscription Record

In case you want to modify the Subscription Info (before generating the Schedule in the next step) of any title for a specific year, follow the steps:-

1. Display the desired subscription record by displaying the journal title and Acquisition Record
2. Press EDIT button to activate the fields
3. Change the data as desired
4. Press UPDATE button to save the changes
5. Confirm the modification by pressing the YES button
6. Now you are ready to generate the Schedule automatically in the next menu

Delete the Subscription Record

You can delete the subscription Record before generating the Schedule in the next menu by pressing the DELETE button and then confirm the deletion by pressing the YES button.

Print the Record

You can generate the report for the title by pressing the PRINT button .

10. SCHEDULE MAINTENANCE

This form is used to generate / maintain the *schedule* automatically where records for loose issues of the journals will be generated for receiving using the software. The schedule generation is based on the yearly subscription information you supplied every year using the previous menu.

The form can be accessed by selecting the "Schedule Maintenance" from the SERIALS module.

How to Generate Schedule Automatically

The Schedule is generated every year, using the features given in the form, however, before generating the schedule, please confirm that you have supplied the right data of the "Subscription Details" in the previous step.

To generate the schedule for an individual journal, follow the steps:-

1. Type the *Year (yyyy)* in the YEAR field
2. Press SEARCH button to populate the journals being subscribed during the given year
3. Select the desired Title from the drop down and press TAB key from keyboard
4. IF schedule is not generated already for the year, the GENERATE SCHEDULE will be enabled
5. Press the GENERATE SCHEDULE button to generate the loose issued automatically
6. After this action, loose issues will be generated filling the Data Grid
7. Now, you can EDIT / DELETE/ PRINT these loose issues for further action

NOTE: In case, you seen any problem in the issue date, you can delete all the issues by pressing the DELETE button and can generate again using the steps given above.

Edit Loose Issues

You can edit / modify the loose issues so generated automatically, by following
the steps:-

1. Select the loose issue to be edited /modified from the Data Grid by
   clicking the record
2. Pres EDIT button to activate the fields given in the right side
3. Change the data as you desired and press UPDATE button to save
   the changes
4. In this way you can modify the loose issues before receiving the loose issues

Issues Not Published/ Credit Note Received

You can tag a particular loose issue as 'Not Published' to exclude it from reminder
list. Also, you can tag a particular loose issue as 'Credit Note Issued' if the issue not
supplied and instead vendor has returned the cost of the loose issue. To tag, select the
loose issue from DataGrid and press the appropriate button and then press UPDATE
button to save.

Delete the Loose Issues

You can delete the loose issues so generated automatically, by selecting the record from
the Data Grid and then by pressing the DELETE button. Please confirm the deletion
once more by pressing the YES button

NOTE: You can not delete the issues which have been received in the library

Add Loose Issues Manually

In case you want to generate the loose issues "manually" , you can add one by one by
following the steps:-

1. Display the Journal Details by selecting the title from the drop down
   after pressing the RETRIEVE button
2. To add loose issues one by one, press ADD button given in the Right side
3. Type the Issue Details in the fields so activated
4. Press SAVE button to save the records
5. In this way you can add all the issues

Print the Loose Issues

To print the loose Issues, press the PRINT button, report will be generated on the
screen which can be printed.

11. RECEIVE LOOSE ISSUES

This form is used to "Receive" the loose issues of the journals generated / added in the previous menu. Whenever, loose issues posted by the vendor/publisher to the library, it must be received in the system.

This form can be accessed by selecting the "Receive Loose Issues" menu from the SERIALS module

How to Receive Loose Issues

Follow the steps given below:-

1. Type the Year (in yyyy format) in the field YEAR
2. Press ENTER or TAB or RETRIEVE button to populate the list of journals in the drop down
3. Select the desired journal from the drop down and press TAB key from keyboard
4. After pressing the TAB key, all the loose issues will be published in the Data Grid
5. To receive the desired loose issue, select it from the Data Grid
6. Press RECEIVE button to activate the fields in the right side

7. Type the Copy being received
8. Press UPDATE button to receive the issue
9. On receiving the issue its RECEIVE STATUS changes to "Y"
10. This way you can receive the loose issues
11. In case, you want to "Un-Receive" the issue, remove the COPY information after displaying it in the right side fields

NOTE: You can receive / un-receive many no of copies of the same issues. Suppose you have received 8 copies of an issue, now you want the un-receive the 4 copies, then type "- 4" in the copy field. 4 copies will be deducted

Assigning the Unique Loose Issue ID

On receiving the loose issue, system will assign a unique ID (Loose issue no.) to each and every copy of the issue which must be written on the Loose issue copy. This unique ID / Loose Issue Number will be used as "Accession Number" for Issue / Return of the copy of the loose issue.

You can generate BAR CODE based on these Unique Loose Issue Number which must be pasted over the copy of the loose issue.

12. GENERATE REMINDERS

This form is used   to generate reminders for non-receipt issues of the journals. To
        Access the form, select the "Generate Reminder" from the SERIALS module.
Following form will be displayed:-

How to Generate Reminder

To generate reminder for non-receipt of the loose issues, follow the steps:-

1. First display the missing issues in the Data grid by pressing the GET NON RECEIPT ISSUES
2. You can filter the search by three fields viz.
    a. YEAR of subscription (yyyy format)
    b. Individual title from drop down
    c. Vendor from drop down
    d. Combination of these three fields
3. Select the FORM from the drop down for inserting the text message will be included in the reminder.
4. Once you get loose issues which have not been received in the library, press PRINT button to generate the report
5. Print the report so generated and post to the concerned vendor

NOTE: To view the details of the record appeared in the Data Grid, click the record to display in the Details area.

13. ADD BILLING INFO

This form is used to add/edit/delete billing info to the Acquisition Record to process the concerned Bill/Invoice using the BUDGET module. It means that before processing the Bill/Invoice, first it must be added in the related Acquisition Records.

The form can be accessed by selecting the ***Billing Info*** from the SERIALS module. You will get the following screen:-

Add/Edit Billing Info

To add /edit the billing info to the related Acquisition Records, follow the steps given below:

1. Display the Catalog Record in the ***Journal Info area*** on the top part of the screen.
2. This can be done either by typing the CAT Number in the CAT NO field or by selecting the titles from the drop down
3. To populate all the journals titles in the drop down, press the SEARCH button
4. Select the desired title from the drop down list
5. Press TAB key or ENTER key from the keyboard to display the details of the journal
6. Select the desired Acquisition Record from the array displayed in the Acquisition Details area by going forward / backward using the ARROW buttons
7. Once desired Acquisition Record is displayed, press the ***Add/Edit Bill Info*** button to activate the fields
8. Press SAVE button to save the record

NOTE: After processing the record, the Process Status of the concerned record becomes "Billed" .

NOTE: The Acquisition Records other than "Ordered" or "Billed" can not be edited on this form.

NOTE: To go backward, remove the billing info from the fields and save the record, then process status of the record will become again "Ordered"

Print the Records

You can generate the reports by pressing the PRINT button

14. ADD PAYMENT INFO

This form is used to add/edit/delete *Payment Info* to the Acquisition Records. The payment details include Cheque Number. Cheque Date, Amount , etc. This information is added after processing of the bills using BUDGET module. This form can be accessed by selecting the "Add Payment Info" menu from the SERIALS module. After accessing the form, following screen will appear:-

Add Payment Info

To add the payment info to the Acquisition Records, do the following steps:-

1. Display the Parent Record i.e. Catalog Record in the upper part of the screen. For this press the RETRIEVE button to populate all the titles in the drop down, select the desired title from the drop down and press TAB key from the keyboard
2. On displaying the Catalog Info, all the Acquisition Records of that specific titles will be displayed in the lower part of the screen.
3. Select the desired Acquisition Record, scroll forward/backward using the ARROW buttons on the screen
4. On display of the desired Acquisition Record, press "Add/Edit Payment Info" button to activate the fields
5. Type the data in the corresponding fields , such as Cheque Number and Date ("dd/mm/yyyy" format)
6. Press SAVE button to save the record
7. Now you have added the Payment Info to the Acquisition Record

NOTE: On addition of the Payment Info, the status of the Acquisition Record becomes "Paid".

NOTE: You can EDIT the payment info by applying the same steps mentioned above.

To generate the report, press PRINT button.

15. UPDATE JOURNAL HISTORY

This form is used to update the history of journal. The history includes the following
Changes in the Title:-

       h.   Close the Subscription
       i.   Title Change (Continue As)
       j.   Title Change (Continue From)
       k.   Split the Title into various Parts

To access the form, select the menu "Update Journal History" from the SERIALS
module.

Close Subscription

In case library stops the subscription of a specific journal title, it should be updated to remove it from the current subscription list. To do so, follow the steps:-

1. Press SEARCH button to populate all the titles in the drop down
2. Select the desired title from the drop down
3. Press TAB button to display the Cataloging details of the selected title
4. On pressing the TAB key, catalog details of the title will be displayed in the Catalog Info area
5. Press the CLOSE SUBSCRIPTION button to activate the fields
6. Type the data in the fields Close Vol No, close Issue no, close Period, etc
7. Press UPDATE CS button to save the record

Title Continue As

In case the Title of journal changed to the next successive title, please follow the steps:-

1. Press the RETRIEVE button to populate all the titles in the drop down
2. Select the desired title to be changed
3. Press TAB key from keyboard to display the cat details
4. Press "CONTINUE AS" button from the screen
5. Select the new title from the active drop down
6. Press UPDATE CA button from the screen to save the title

Continue From

This is also true to change the reference of the previous title, follow the steps below:

1. Press RETRIEVE button to populate all the titles in the drop down
2. Select the desired title
3. Press TAB key from the keyboard
4. Press the CONTINUE FROM button to activate the drop down
5. Select the title from the active drop down which was the previous title of the journal selected
6. Press UPDATE CF button to save the record

Title Split into Parts

In case an existing journal title Split into various parts, then you have to save the references of these parts to make relationships of the new titles to parent title. To do so, follow the steps:-

1. Press RETRIEVE button to populate all the titles in the drop down
2. Select the desired parent title from the drop down and press TAB key
3. Press the SPLIT INTO button to activate the drop downs

4. Select the new split titles from these drop downs and press UPDATE SI button to save the records

NOTE: A title can be split into maximum three titles in this software

16. ADD JOURNAL HOLDINGS (Bound Volumes)

This form is used to add bound volumes of the journal available in a library known as journal holdings. This is just like we add books holdings in a library. The form can be accessed by selecting the menu "**ADD Journal Holdings**" from the SERIALS menu

How to Add Journal Holdings

To add the journal holdings in the database, you have to add the details of the bound volumes of the journal, one by one, available in a library. The copy details are added in the records along with the Accession Number, call number, pagination, etc. To add the new bound volumes, follow the steps:-

1. Press the SEARCH button to populate all the titles in the drop down
2. Select the desired title from the drop down
3. Press the TAB key from the keyboard to display the bibliographic details of the journal selected

4. Pres the ADD NEW button to activate the fields for data
5. Enter the data in the corresponding fields
6. Press SAVE button to save the record

NOTE: The fields in Red Color are mandatory. Enter the Accession Number of the bound volume in the ACCESSION NUMBER field. Enter date in "dd/mm/yyyy" format.

Edit the Holding Record

To edit / modify the existing holding record, follow the steps:-
1. Press RETRIEVE button to populate all the titles in the drop down
2. Select the desired title from the drop down
3. Press TAB key from the keyboard to display the details of the title
4. Press EDIT button to activate the fields
5. Change /modify the data/contents
6. Press UPDATE button the save the changes

NOTE: Select the collection type from the option given on the screen. The Reference collection will not be issued.

Print the Journal Holdings

You can take the print of the journal holdings along with the title details by pressing the PRINT button, report will be generated on the screen which can be saved to hard disk or can be send to printer direct.
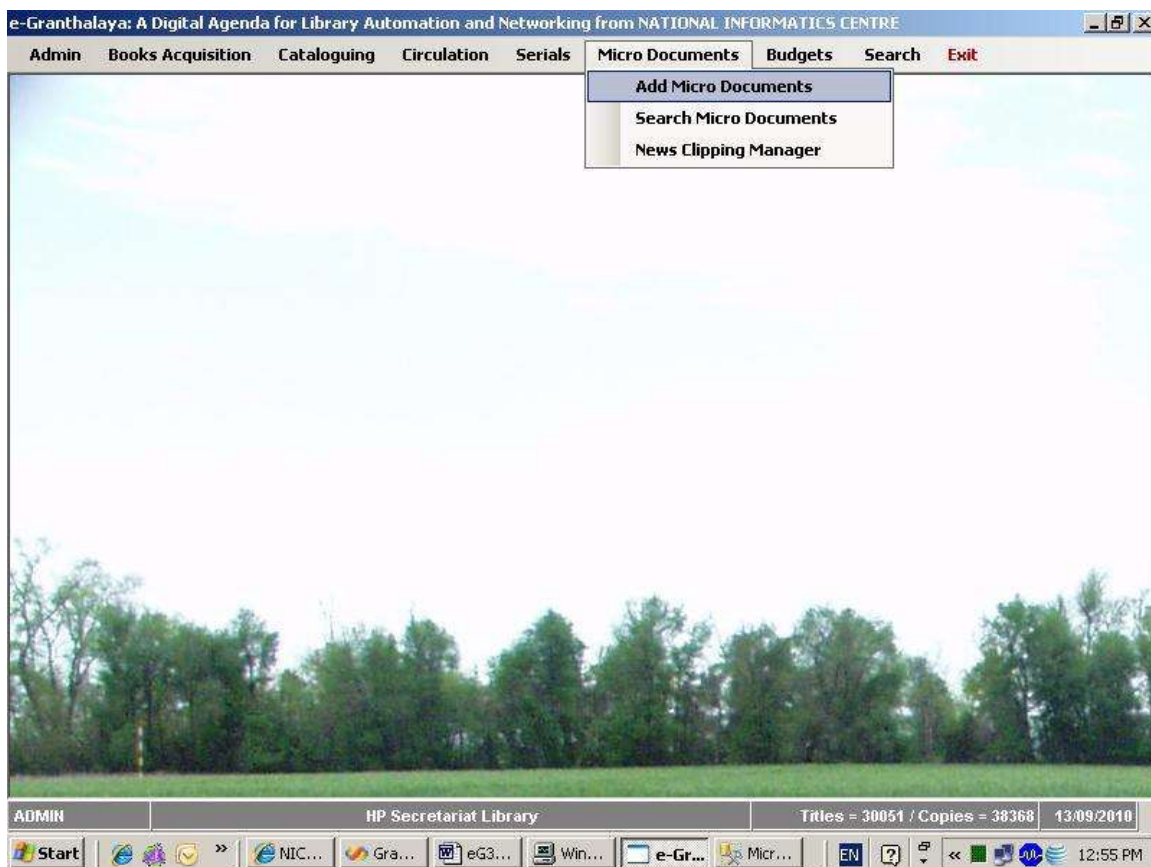
Chapter 8
Micro Documents Manager
(Articles Indexing Module)
(Digital Repository Creation)

This module is used to manage the Articles Indexing Bibliographic service provided by the libraries. Under this service, the important articles from journals and chapters from books and news items from newspapers are indexed in the database and provided through Web OPAC of the e-Granthalaya software. Besides, Module is used to upload full text files (pdf, doc, etc) in the record which are accessed using OPAC, thus, libraries can build their institutional repositories of micro-documents.

The module contains two menu only:-

1. Add Micro documents (articles from Journals/Magazines, Chapters from Books)
2. Search Micro Documents
3. News Clipping Manager (News Items from Newspapers)

1. ADD MICRO DOCUMENTS (Articles from Journals and Magazines and Chapters from Books)

This form is used to add/edit/delete the bibliographic details of the useful articles from journals and chapters from books in the database. This module can be used to build a DIGITAL REPOSITORIES of micro documents as it provides the facility to upload the digitized files along with meta data. For adding the articles/chapters/special issues of the journals, first a Catalog Record of the parent/source Title must be added using ADD NEW TITLE in BOOKS ACQUISITION/RETRO-CONVERSION/SERIALS module of the software. There are three important types of articles added in the database:-

1. Articles from journals (A)
2. Special Issues of Journals (S)
3. Chapters of the Books (B)

To access the form, select *Add Articles* menu from the ARTICLES module, following screen will appear:-

Add New Article Details
To add the new article details in the database, follow the steps:-

1. Decide from which source you are going to add the articles/books/special issues of the journals.
2. Select the Type of Source by clicking the radio button given in the Green color
   a. Books   - For adding chapters
   b. Journals   - For adding articles/special issues

3. Press SEARCH button to populate all the parents/source documents in the Data Grid from the category you selected
4. For a specific title, you can search the source by typing the keyword in TITLE / ISSN / ISBN fields and then press SEARCH button
5. Select the desired source title from the first Data Grid by clicking the title from the left side
6. If you have already added articles for the source title you just selected, these articles will be displayed in the lower grid otherwise it will be blank
7. To add the new articles/chapters/special issue, press ADD NEW button to activated the fields in the right part of the screen
8. Type the details of the articles/chapters/special issues in the corresponding fields
9. Select type of articles from the drop down
10. In case you have full-text file (in any format) of the concerned articles, you can add the same by pressing the UPLOAD FILE button – browse /select the file from hard disk
11. Assign one main subject of the article from the SUBJECT drop down
12. Assign keywords , separating by semicolon(;) in the KEYWORD fields
13. BROWSE the Digital File (in any format) to UPLOAD with the record
14. Press SAVE button to save the new record

Edit Articles

To EDIT / MODIFY the existing articles/special issues of journals/ chapters, follow the steps :-

1. Search the Source Title (book or Journals) by its TITLE or ISBN/ISSN number and press RETRIEVE or
2. Press RETRIEVE button to populate all the source titles in the selected category
3. Select the desired SOURCE title from the data grid1 by clicking it
4. On clicking the source title, all the existing articles will be displayed in the Data Grid 2
5. Select the desired articles to be edited from the data grid2
6. Press EDIT button to activate the fields
7. Change / modify the contents
8. Press UPDATE button to save the changes

Delete Articles Record

To delete the record, follow the steps:-

1. Populate the desired SOURCE title either by searching by TITLE/ISBN/ISSN number or populate all the source titles in the Data Grid1 by pressing the RETRIEVE button
2. Select the desired Source Title from the Data Grid 1 by clicking it
3. On clicking/selecting the source title from the Data Grid1, all the existing articles will be displayed in the Data Grid2
4. Select the desired Article to be deleted from the Data Grid2
5. Press DELETE button
6. Press YES button to confirm the deletion

Reports of Micro-Documents

The existing articles can be printed by pressing the following three PRINT buttons depending the type of reports to be generated:-

Print Summary – To print the summary of the articles
Print Details   - To print the full details of the articles
Print This Record - To print a single record displayed

How to Upload Full Text file of Article (Digital Library)

In case you have digital file of any article, you can upload this file with the record of the concerned article. This can be added either while adding the new article record or later while Editing the existing article record, just by pressing the UPLOAD FILE button and then select the file from your computer and SAVE or UPDATE the record.

2. SEARCH MCRO DOCUMETNS

This Form is used to search and print the existing articles / chapters / special issues of the journals already indexed in the database. The form can be accessed by selecting the "Search Articles" menu from ARTICLES module, following screen will appear:-

How to Search Articles

Articles / special Issues of journals / books chapters can be searched with the following access points:-

1. By Cat Number i.e. by a particular Book or Journal Title
2. By an articles number which is unique and generated automatically by the systems on addition in the database
3. By Keywords from various fields of the Articles

a. Title
b. Authors
c. Keywords
d. Abstract

To search the Articles, first select the article Resource type (Journal or Books) With the FIND SOURCE you can display all the Titles of Books or Journals and then articles can be displayed by clicking these parents sources.

To populate all the articles, press FIND ARTICLES button

In case you want to see the details of an individual articles, click the desired article , details will be shown in the right side of the screen.

Print the Results

The list of articles or individual article details can be printed by pressing the corresponding PRINT button to generate the reports on the screen. This report can be printed over printer.
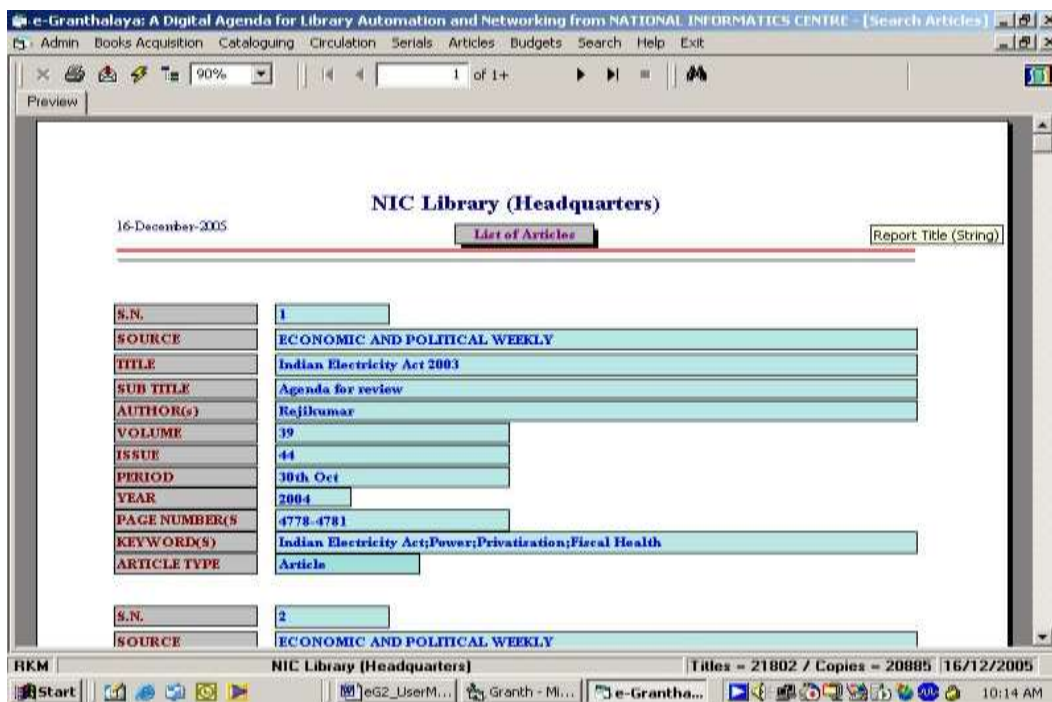

4.   News Clippings Manager

This Form is used to provide the News Clipping Services in the Library where library adds the useful news items from newspapers/newsletters and any other resources as micro-documents and these news items become accessible over Internet / Intranet using Web OPAC. In the form also, full text file / digital file can be uploaded along with the meta data which can be accessed later in Web OPAC.

How To Add News Items

Before adding the News Items in the database, it is assumed that you have added catalog record of the Newspaper/Newsletter using the SERIALS module (Add New Serial). While adding a master record / catalog record of each newspaper/newsletter, it is reminded to select the 'Newspaper or Newsletter' from the Document Type drop-down and 'Newspaper' from Materials Type drop-down.

To add News Items, Select the Name of the Newspaper from drop-Down in the left side of the screen below and press ADD button to activate the data entry form. Then press the ADD NEW Button and type the meta data of the news item selected. In case, you are having digital file (in any format or pdf, images, etc) of the news item then for uploading the file press UPLOAD FILE button and browse the file. To save the record and digital file press SAVE button. Once you saved the news items, it becomes available in the Web OPAC for searching. In the SUMMARY text box, you can past the full news items also. In case internet connection is there then you may copy the details of the news items from web edition of the newspaper.

NOTE: The same form is also used for SEARCHING the news items from various access points from the database.
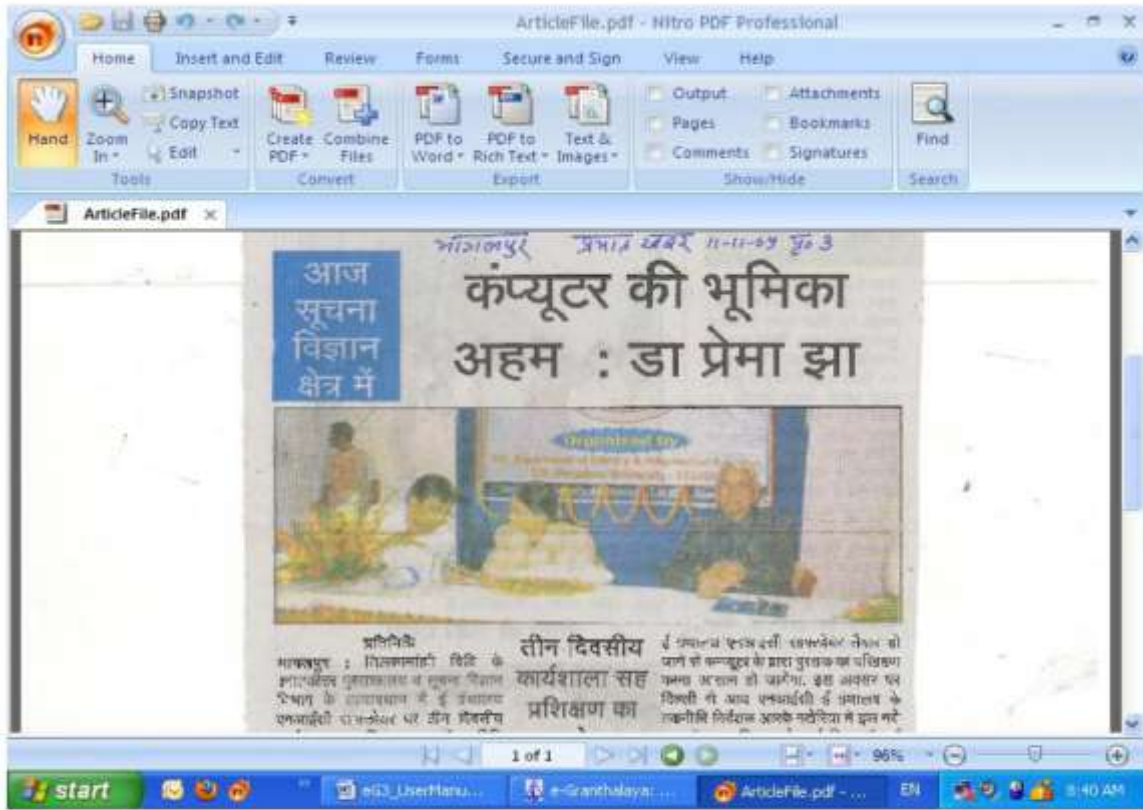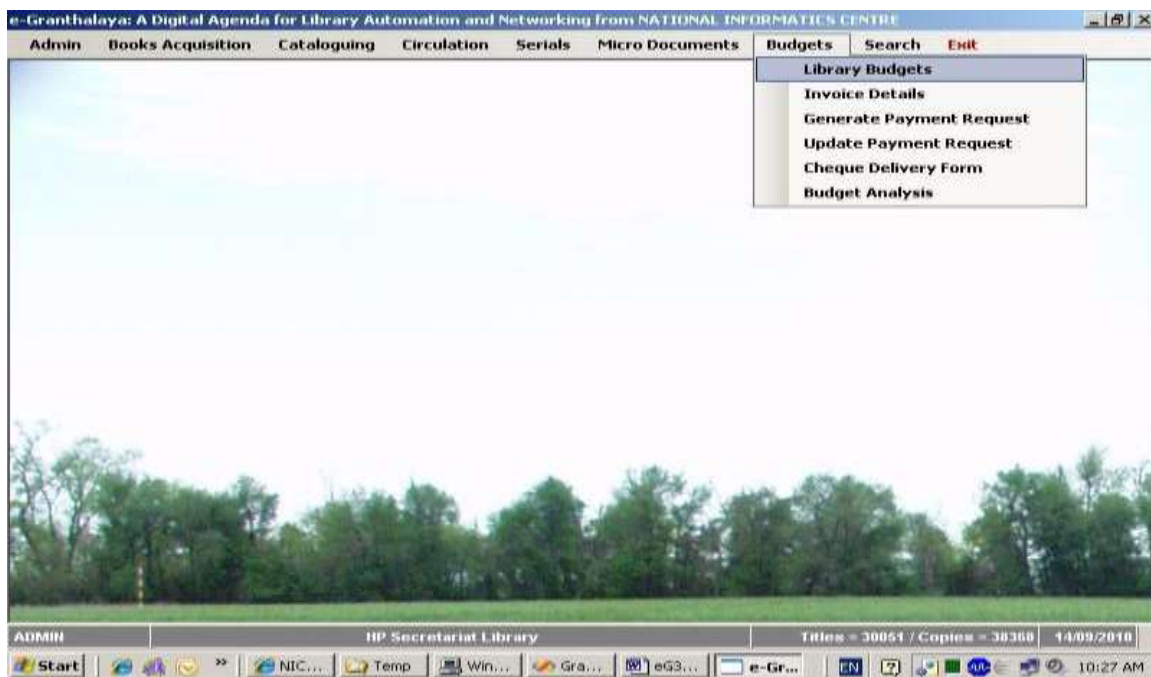
Chapter 9
Budgets Module

This module is used for the following functions:-

1. To add budget info on yearly basis
2. Processing of the Invoice
3. Generating Payment Request to be sent to the Accounts Section
4. Updating Payment Request / Cheque delivery to the Vendors, etc
5. Budget Analysis

NOTE: Before working with this module or processing the Invoice, First the invoice/bill in question must be entered in 'Add Bill Info' under BOOKS ACQUISITION or SERIALS modules. Bills entered direct in Full-Cataloging can not be processed here.

1. ADD LIBRARY BUDGETS

This form is used to add/edit/delete/print the Budget details of the library every year.
To access the form, select the "Library Budget" menu from the BUDGETS module, following form will appear:-

Add Library Budget

To add library budget for a specific year, follow the steps:-

1. Press the ADD NEW button to activate the blank fields
2. Enter YEAR in yyyy format e.g**. 2005** (for F/Y 01/04/2005 to 31/03/2006)
3. Enter Budget Head
4. Enter Period i.e Financial Period (e.g. 01/04/2005 TO 31/03/2006)
5. Enter amount in Rupees (40000.00) Forty Thousand
6. Press SAVE button to save the record
7. Thus you can create one Budget Record every year

NOTE: Do not enter data in ID field during ADD NEW or EDIT process, it is system generated field

NOTE: Many Budget Heads can be entered in one Year

Edit Budget Record

To edit the existing budget record, follow the steps below:-

1. Select the desired record from the Data Grid by clicking it
2. Press EDIT button to activate the fields
3. Change / Edit the contents by re-writing / over writing
4. Press UPDATE button to save the changes

Delete Record

To delete the existing budget record, follow the steps:-

1. Select the desired record from the Data Grid by clicking it
2. Press DELETE button to delete the record
3. Press YES button to confirm the deletion
4. Record deleted with the message of deletion

NOTE: If the Budget Record has some links / relationships in the database, it will not be deleted. For deletion of a record, first remove its all the references

Print Budget Record

To print the records, first select the print option for Summary / details and the press the PRINT button to generate the report. Then you can send it on the printer

2. ADD INVOICE DETAILS (Bill Processing)

This form is used to process the Invoice/bill details. However, the invoice/bill must be entered in 'Add Bill Info' of BOOKS ACQUISITION or SERIALS Module. To access the form, select the "Invoice Details" menu from **BUDGETS** module , following screen will appear:-

How to Add Bill Details

To add the bill details, first add the **Invoice Number** in "Add Bills Details" form in BOOKS ACQUISITION or SERIALS Module in the related CAT Records. Then you need to add Invoice Details here under BUDGETS module to process the invoice.

To add the bill details follow the steps:-

1. Access the form by selecting the "Invoice Details" from Budgets module
2. Select **Budget Year** from the drop down
3. Select **Budget Head** from the drop down menu
4. Say Y/N for type of Invoice (Supplementary or not)
5. Enter Bill / Invoice no (As given in the printed copy) , date, amount etc.
6. Select Currency from drop down, enter conversion rate, if any
7. Enter Discount Percentage, additional charges, your deduction, etc if any
8. Select Vendor Name from the drop down
9. Enter **Payment Request Number** (a unique no , i.e. green sheet number which will be sent to the accounts section) – you can add many invoice/bill nos. in the same Payment Request Number
10. Press CALCULATE button to calculate the bill
11. Press SAVE button to save the invoice
12. After Saving the Invoice, it becomes available in the Data grid, from here you can again select the bill no for editing , if required – Status of invoice will be NEW.

ATTACH THE TITLES

13. Select the Invoice Record from Grid and press EDIT button
14. To process the Items (Titles under this bill no), press the ATTACH TITLES button to add the titles in this invoice (The same Invoice must be saved with corresponding Acquisition Records in the BOOKS ACQ and SERIALS module)
15. In case, no title is there or you have not given the same Vendor / invoice number which you entered under "Add Billing Info" – then a message will be flashed …No title exist
16. Then Press the PROCESS button to process the titles along with the bills
17. Now you can take the print of the Bill payment Request form to send to the accounts section for making payment

NOTE: After processing the Bill here on this form, the status of the Bill becomes "Billed"
NOTE: You must enter a unique PAYMENT REQUEST NO for n number of Invoices to club these in one Request.
NOTE: Many bills can be processed together under SAME PAYMENT REQUEST NUMBER which are to sent to Accounts Section for payment.

How to EDIT the Bill

You can EDIT the bill before sending it to the Accounts section , it means before the STATUS of the bill changes to "Posted" in the next form. To edit the bill, select the bill and press EDIT button – then follow the steps given above.

3. GENERATE PAYMENT REQUEST

After processing the Bill and titles, you can generate the Payment Request Number to send to the accounts section. To generate this , follow the steps:-

1. Access the form by selecting the menu "Generate Payment Request" from the BUDGETS module, following screen will appear

2. Select Payment Request Number from drop down and press SUBMIT button
3. The bill(s) will be displayed
4. Click the Check boxes to include the bill(s) in the request
5. Press POST button to process the Payment Request Number
6. The bill status will become "Posted"
7. Access again the form to take print of the Payment Request No by pressing the PRINT button

4. UPDATE PAYMENT REQUEST

This form is used to update the Payment Request Form sent to the Accounts section after you receive the Cheques. The following steps are required:-

1. Access the form by selecting the menu "Update Payment Request" from the BUDGETS module

2. Select the Payment Request No from drop down
3. Press SUBMIT button
4. Check the Check boxes at the left side
5. Enter the Cheque details in the fields
6. Press the UPDATE button to save the changes

NOTE: Now you can generate the Check Delivery forms to send the check to the concerned vendors in the next menu

5. CHEQUE DELIVERY

This form is used to generate the check delivery form for sending to the vendors. To access the form select "Check Delivery" menu from the BUDGETS module, following screen will appear:-

How to Generate Check Delivery form

To generate Cheque delivery form, follow the steps given below:-

1. Access the Form by selecting the menu "*Cheque Delivery Form*" from the BUDGETS module
2. Select the *Payment Request No* from the drop down menu
3. Select the *Vendor Name* from the VENDOR drop down menu
4. Select the *Text Message* to be printed from the MESSAGE drop down
5. Press PRINT button to generate the report
6. Print the report generated
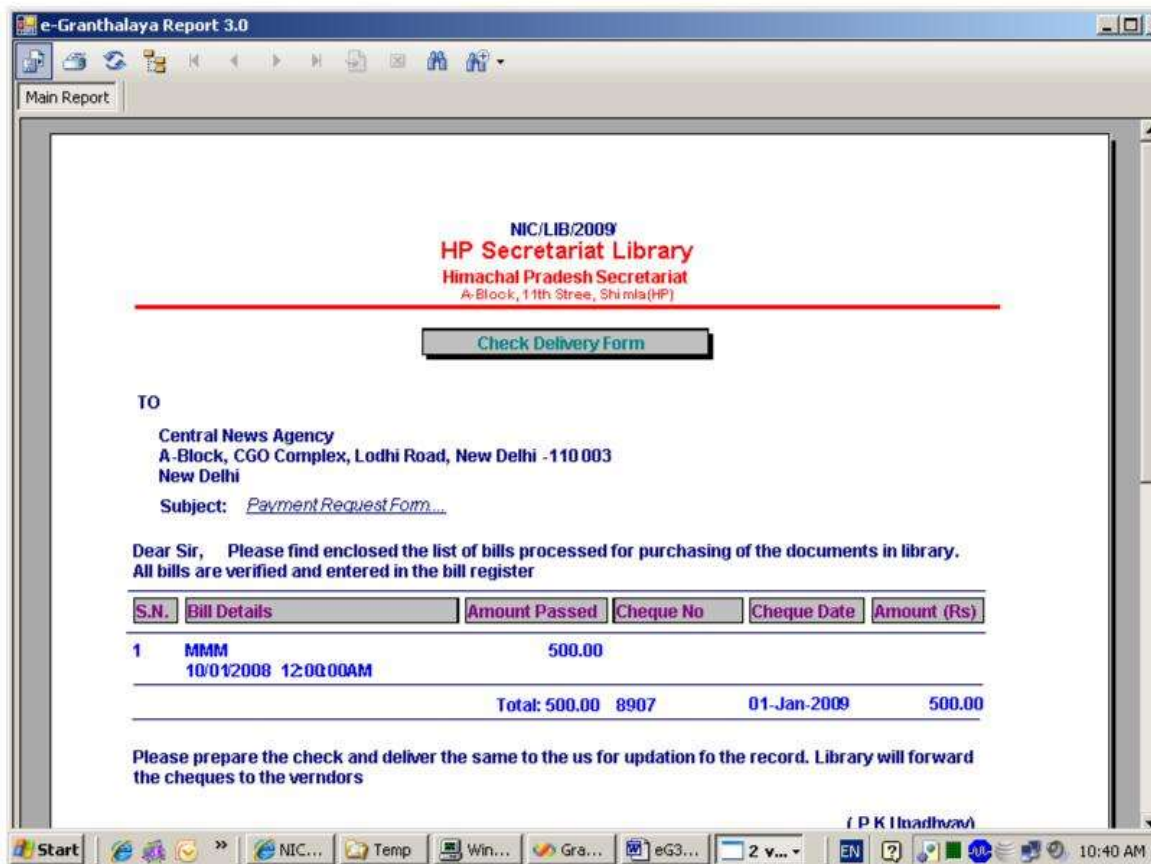
BUDGET ANALYSIS

On this form Analysis of Budgets from various angles are done and various reports are generated. Budget analysis of one year or all the years can be done. Here, expenditure report of one year of many years can be generated.

1. Generate Summary of total expenditure of library
2. Generate Report of Books/Monographs and SERIALS expenditure
3. Generate Bill Register Year – wise / Budget Head wise / with Vendors/Bills details

Chapter 10
Database Utilities Module

This module provides many utilities related with the database as given below:
1. How to Take Database Backup and RESTORE/RECOVER database over existing one (IF new / blank)
2. Data Entry Statistics
3. How to Export Data in various Formats
4. Feedback Manger
5. Receipt Manager
6. How to change database connection
7. Merge Databases
8. Import Records from other Sources
9. Import Catalog Records from EXCEL
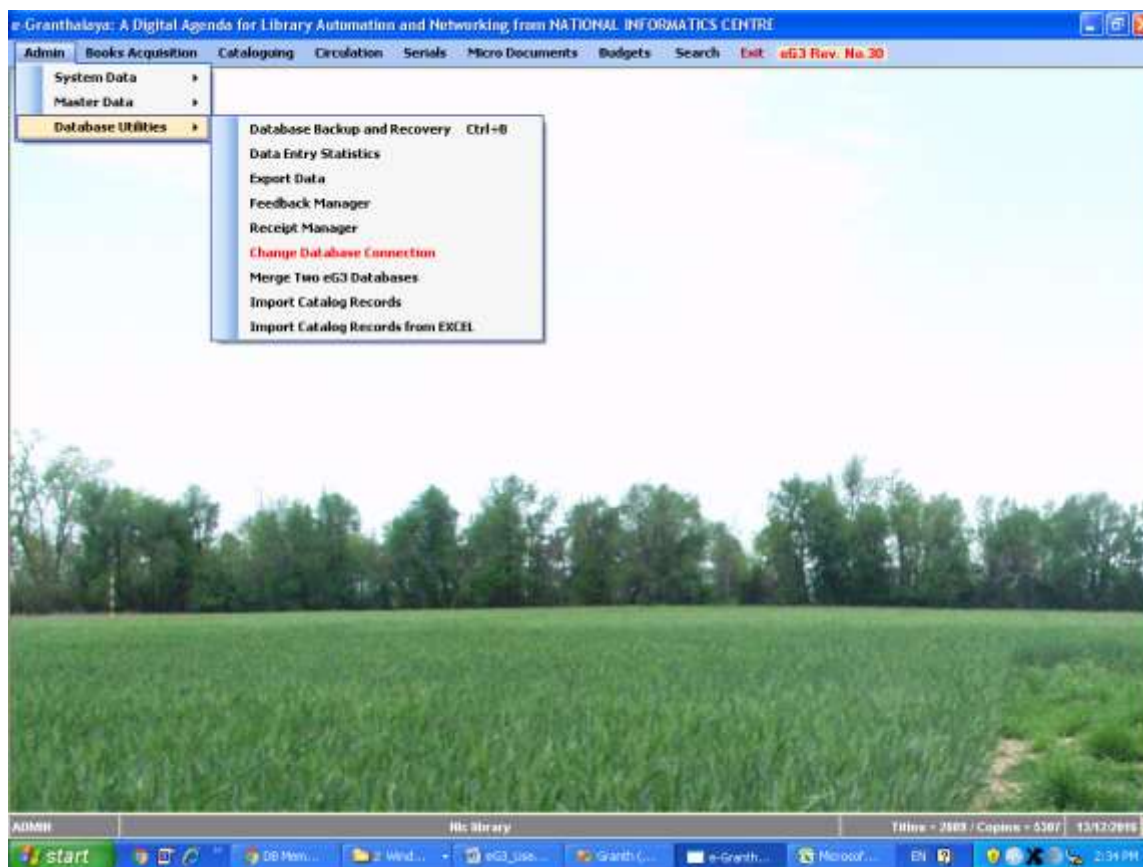
## 11.1. How to Take Database Backup

As e-Gratnhalaya™ uses MS SQL Server database management system to store the data of the library. Therefore, it is essential to keep the backup of the database of the library so that it can be restored later any time.

The backup of the database is always performed by the System Administrator on the Server PC where database system is installed. The database must be backup on the hard disk and later the backup file must be stored in CD ROM or pen drive, etc

11.1.1. Perform Backup from e-Granthalaya Data Entry Program

To take the database backup from e-Granthalaya Data Entry Program, do the following steps:-

1. Create a LIBRARY folder in C/D Drive of the Server PC where your database is residing.
2. Go to Database Utilities >> Database Backup menu in ADMIN module of the software
3. Press BACKUP button to perform the backup
4. Once backup process is complete, it gives message about the path of the backup file and its name.
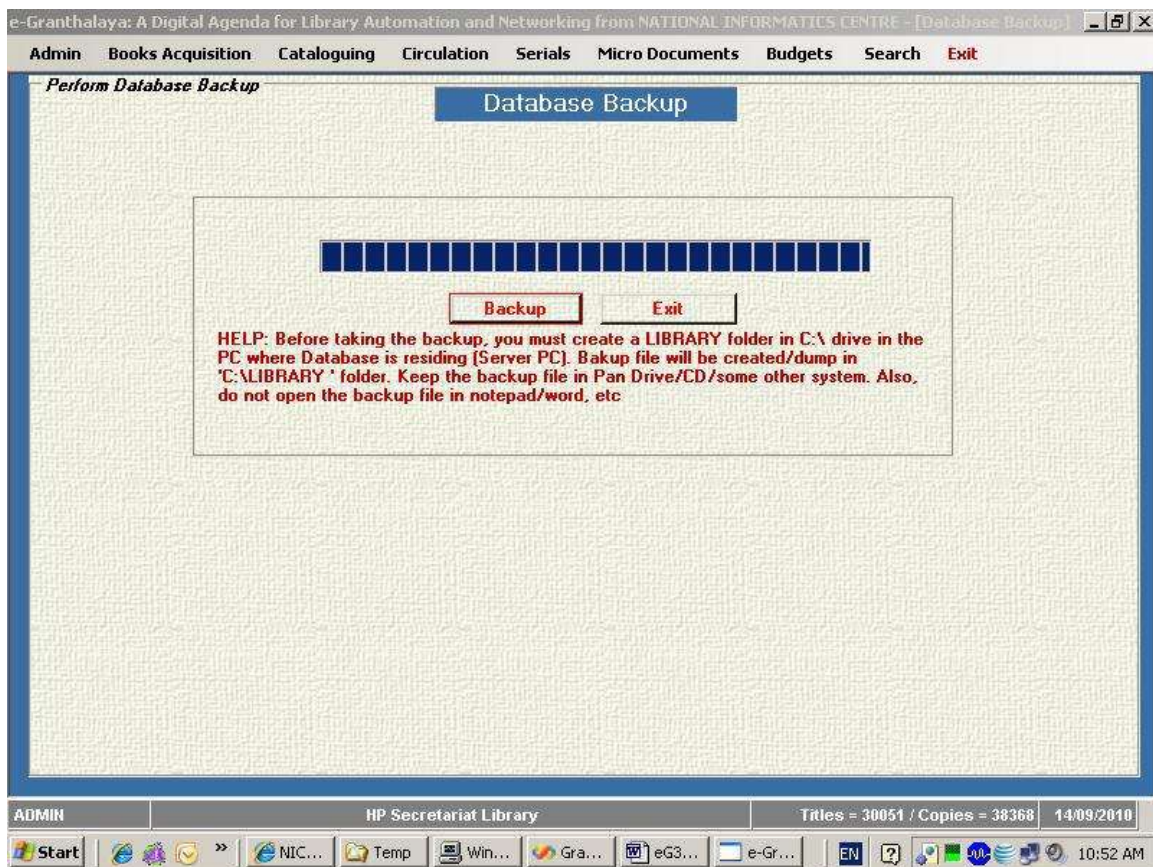
NOTE: While performing the backup you must not use the e-Granthalaya.
NOTE: Make sure that you must have the Write Permission of the file in the LIBRAY folder to over-write the existing backup file
NOTE: In case u receive any error then first delete the old backup file from the LIBRARY folder then perform the backup
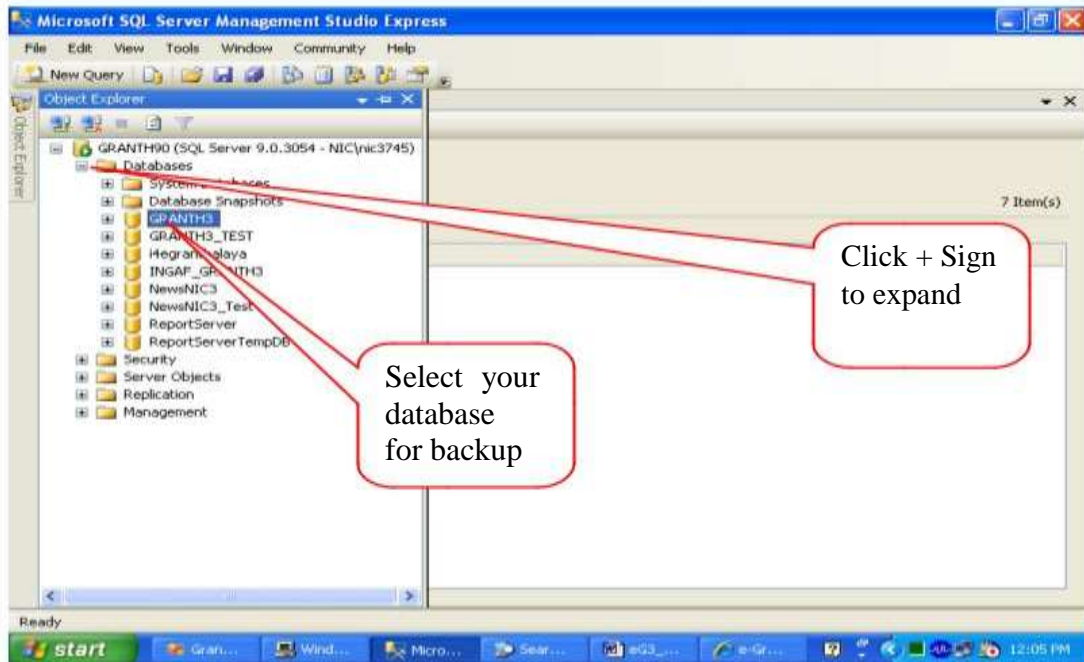
11.1.2. Perform Backup from MS SQL Server 2005/2008

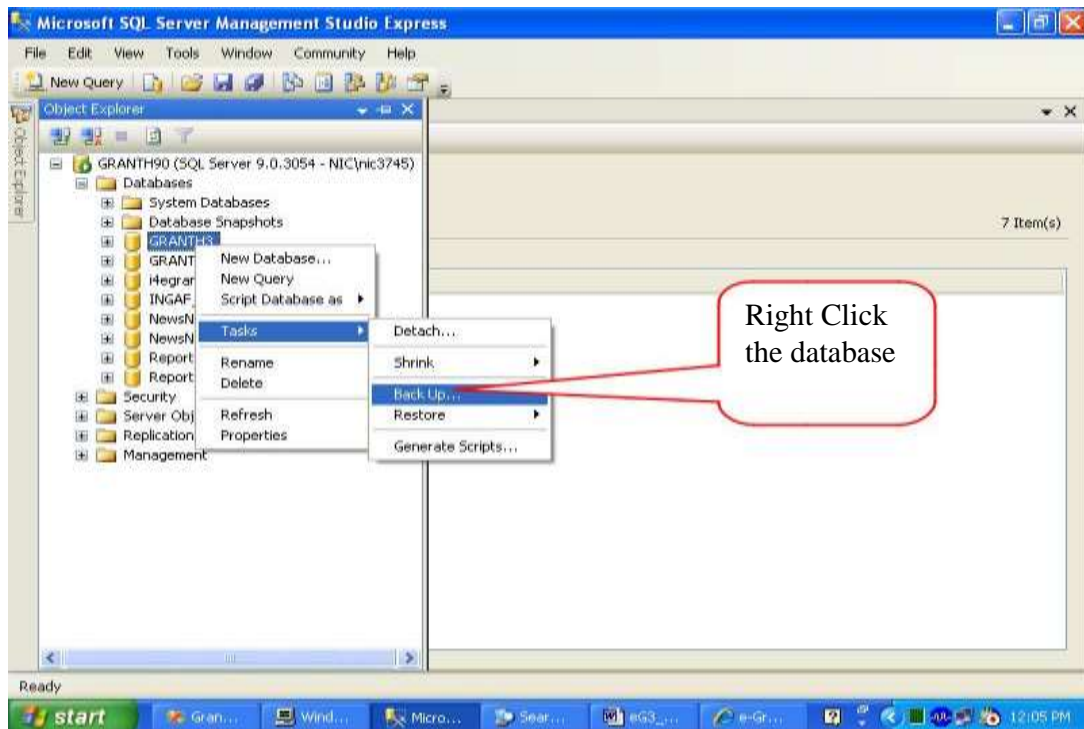Following steps are required to take the database backup:-

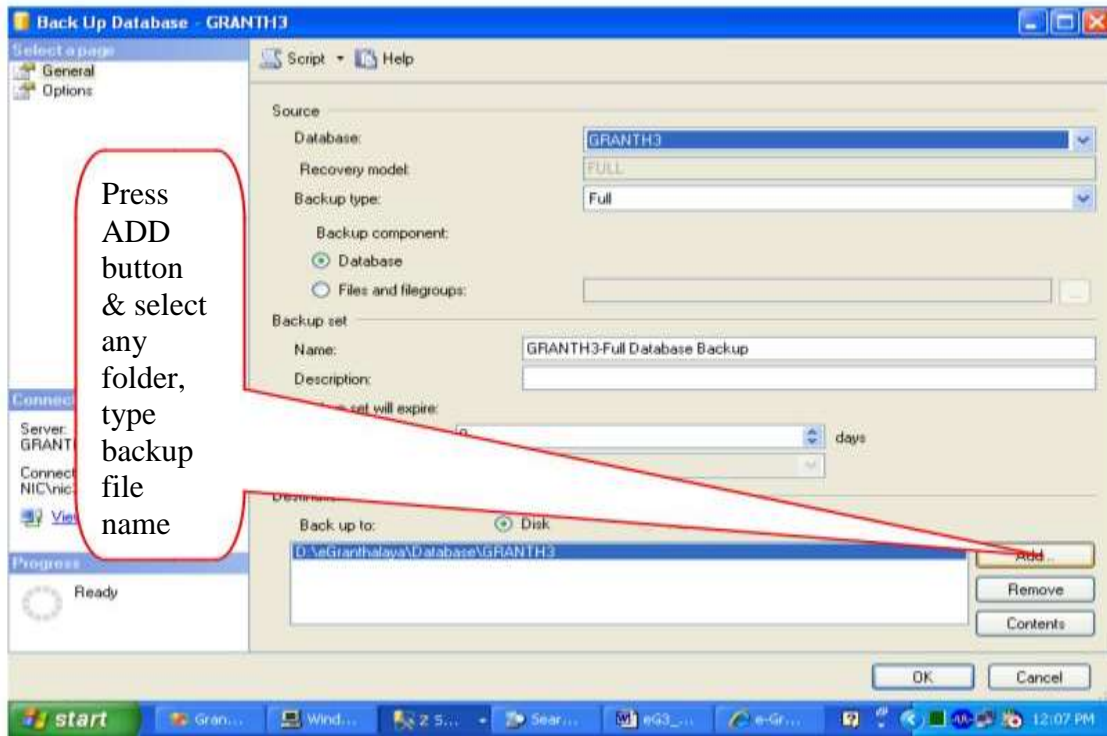1. Run the MS SQL server 2005 Management Studio from Programs >> MS SQL Server 2005
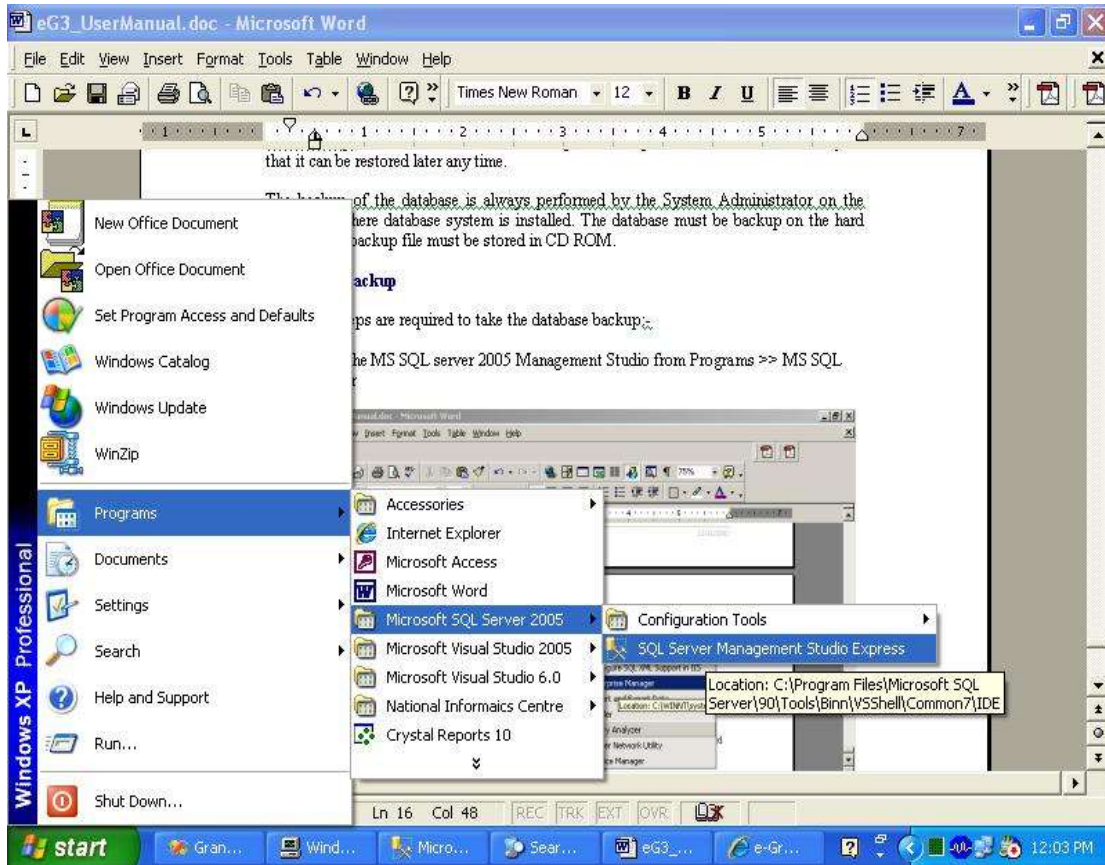
2. After Connecting your Server, expand the Database interface up to your database by just clicking the + sign
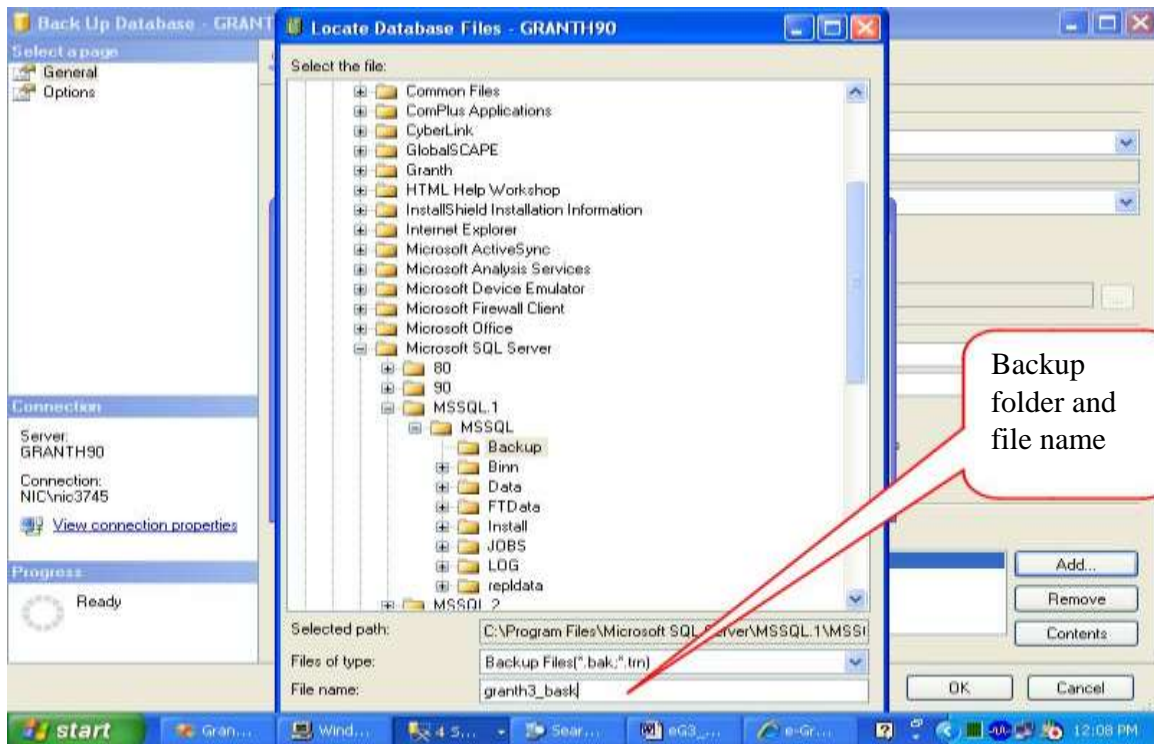
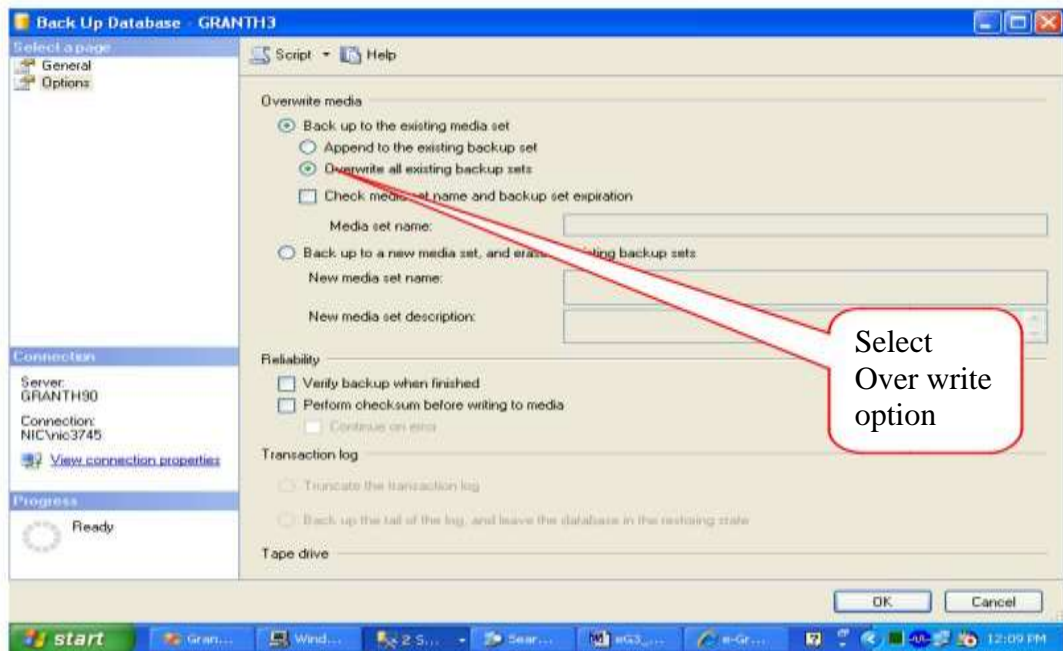3. Right Click your database and select the Task >> Backup database menu

4. Press the **ADD** button to add the backup file name (First Time only) and its location/path

5. Browse the folder where you want to store the backup file and type the name of the backup file (anything)

6. Select *Over Write* option from the screen

7. Press OK button to perform the backup
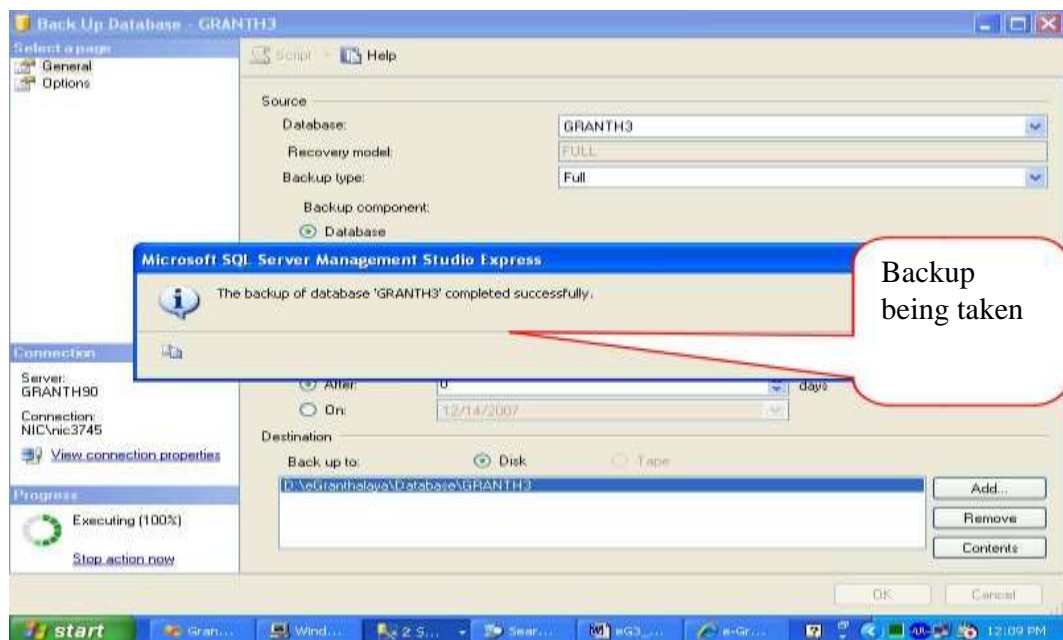
8. Press OK to finish the backup

11.2. Data Entry Statistics

This form is used to check the data / records quality as well as to calculate the number of records entered during a particular period. You can SEARCH the database by USER

NAME who added the records along with Cut-of –Date. You can generate various types of reports order by USER NAME or some other fields.

NOTE: While generating Report, you can select option from drop-Down 'Group By in Report' for various kinds of reports. Three kinds of reports:-

a). Compact Report
b). Summary Report
c). detailed Report

11.3. Data Export

e-Granthalaya Software is well compliant with International Standards and export facility has been added. Using this form you can EXPORT the data in the following formats:-

1. CSV Files
2. MS Access File
3. MARC 21 Display Format
4. MARC 21 Communication Format
5. MARC XML File
6. ISO: 2709 Format
7. Excel File

To generate the EXPORT file, first search the records with various access points, once records appeared then press the corresponding button to export the records.
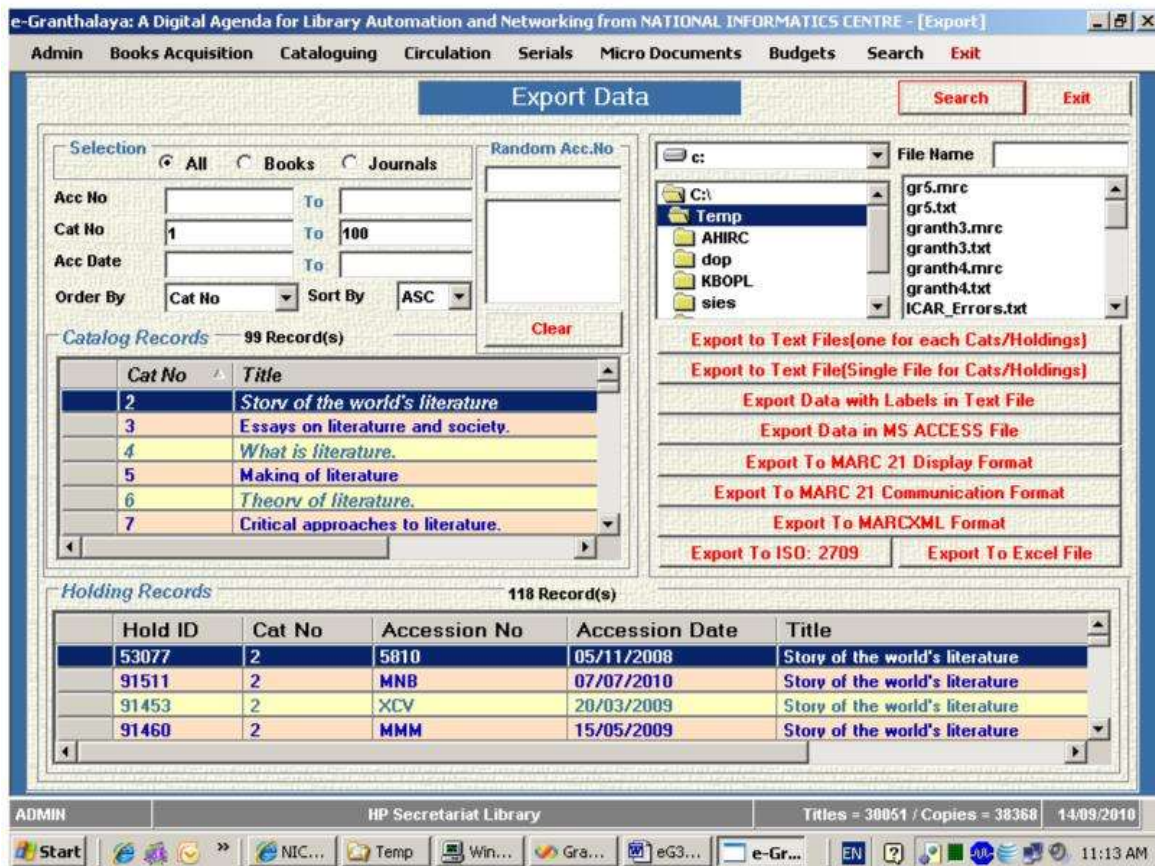
11.4. Feedback Manager

This form is used to read the Feedback submitted by the users using Web OPAC. On this form you can allow to view the feedbacks to other users in OPAC by putting Y/N in VIEW text box. Put N in case you do not want to view the feedback to other users.

11.5. Receipt Manager

This form is used to generate various kinds of reports of the money library received/charged from the member for new membership/fine, etc. Such payment is taken in Circulation module.

11.5. Change Database Connection

This form is used to Change the Database connection. Sometimes you may need to shift your database from one server to another then you need to update the database connection string on this form. On this form there are 4 parameters which you must provide:

1. Database Server Name or IP address(With name of SQL Instance) – you can get the name of the server from first screen of SQL Server Management Studio
2. Database Name
3. Database Login
4. Password

NOTE: After typing these parameters, you must TEST the connection. If it is succeeded then SAVE it and close the form and run the application
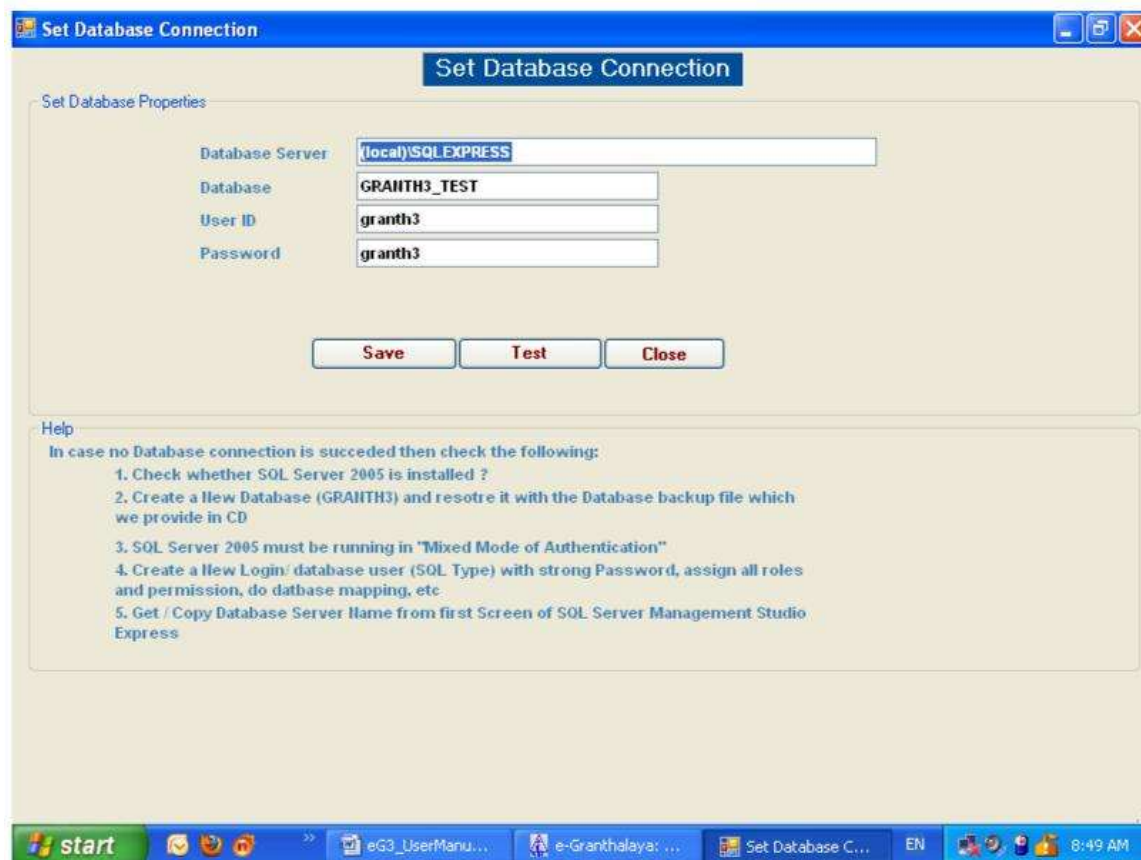
MERGE TWO DATABASES of e-Granthalaya

This form is used to merge two or more databases of e-Granthalaya of the same library if data entry is done in many independent PCs with separate Database. Many librarians are doing data entry at home also. Once data entry is complete then these databases can be merged into one to make a final database.

Source Database – The database which will be merged into Final Database.
(e.g. database in home pc)
Destination Database – The Final Database where all records after merge will
be residing – this database will be used finally with e-Granthalaya.

NOTE: Here data from all the Tables will be merged except CIRCULATION Data.

Step1: Load the 'Merge Databases Form' from ADMIN>>Database Utilities module and browse/select the backup (of source database) from local drive by pressing BROWSE BACKUP button.

Step2: Press 'RESTORE SOURCE DATABASE' button – it will restore a new (Source) database in your local system and after restore name of the database will be printed in the text box. Put the name of login (granth3) and password (granth3).

NOTE: In case already u have restored the source database in local/LAN PC then skip the above two steps and just type the connection string of the source database.

Step 3: Press CONNECT DATABASE – it will connect the source database.
Step 4: Press SOURCE DATABASE TABLE button and then press DESTINATION DATABASE TABLE button – it will show the records of all the tables in both the databases.

Step 5: Press LOAD RECORDS FROM SOURCE TABLE button – records to be migrated will be filled in the DataGrid.

Step 6: Press UPLOAD RECORDS Button finally to merge records. Once it is finished then exit the software and re-run e-Granthalaya.

NOTE: After merging the databases you must check all the records properly.
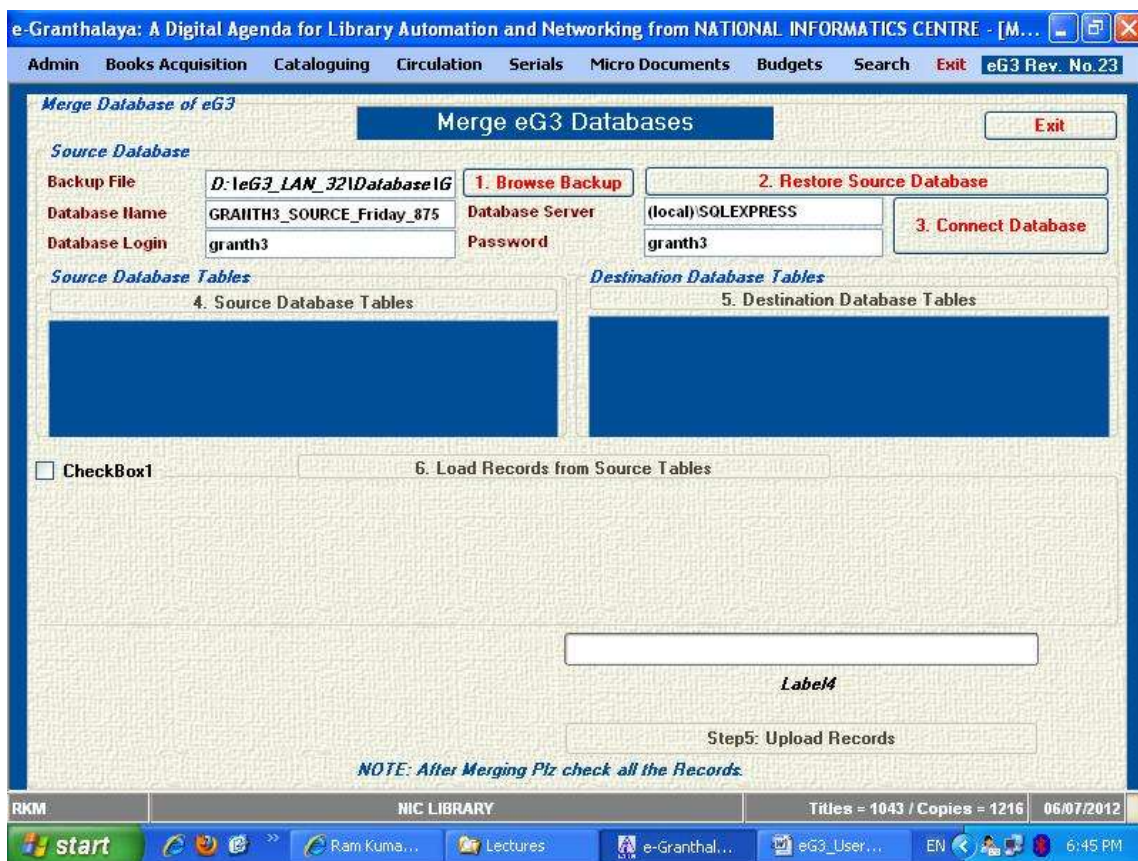
How to Import Records from Other eG3 databases

Import of records can only be possible in e-Granthalaya from Standard format like MARC, MARCXML, ISO: 2709, etc. Before import of the records it is advised that backup of the database must be done for safe side.

Import facility exists in ADMIN >> Database Utilties >> Import Records as given in the following screen:
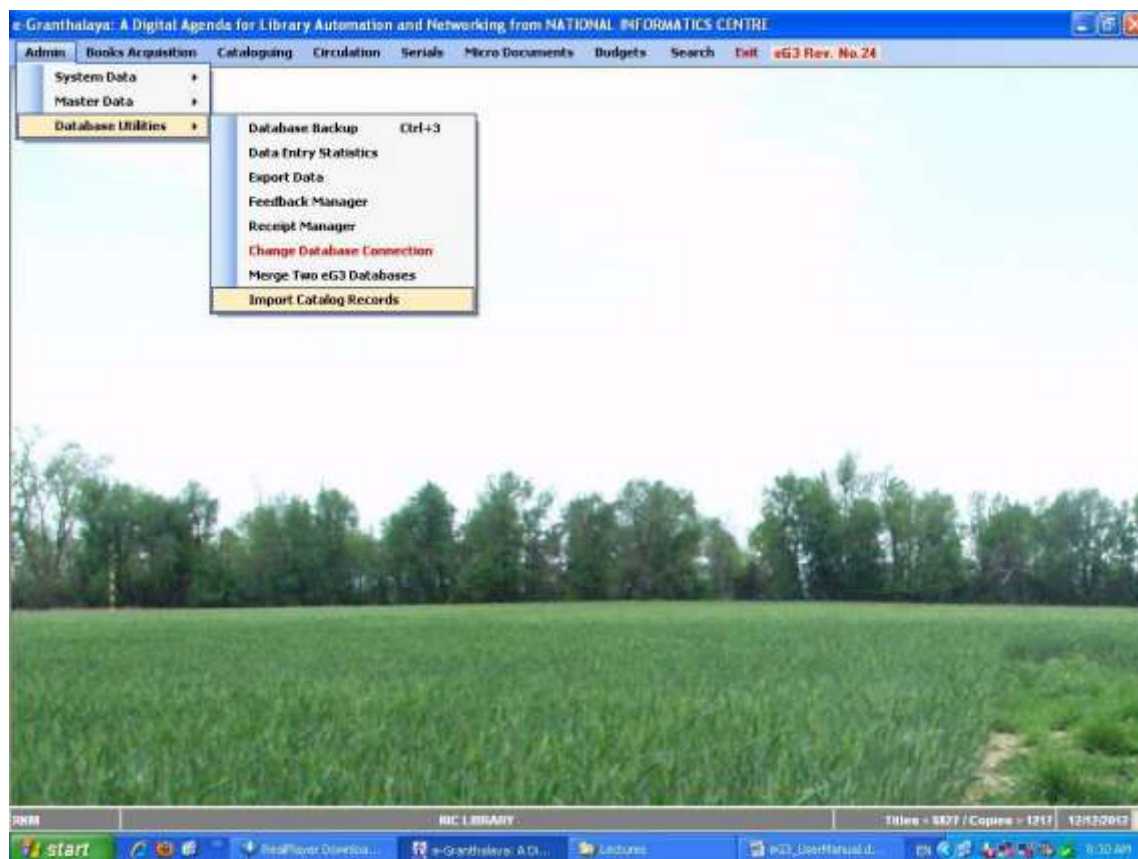
Import can be done (at present) from a). from another database of GRANTH3 and b) from MARC communication File.

Import from another database of eG3:

Step 1: Select option from drop down – Import from eG3 database.
Step 2: Browse the backup file of GRANTH3 database from which you wish to import records.
Step 3: Press RESTORE database to restore a new 'Source database' of GRANTH3 with a new name. In case SOURCE database already exists in the local pc or on LAN then this step can be skipped.
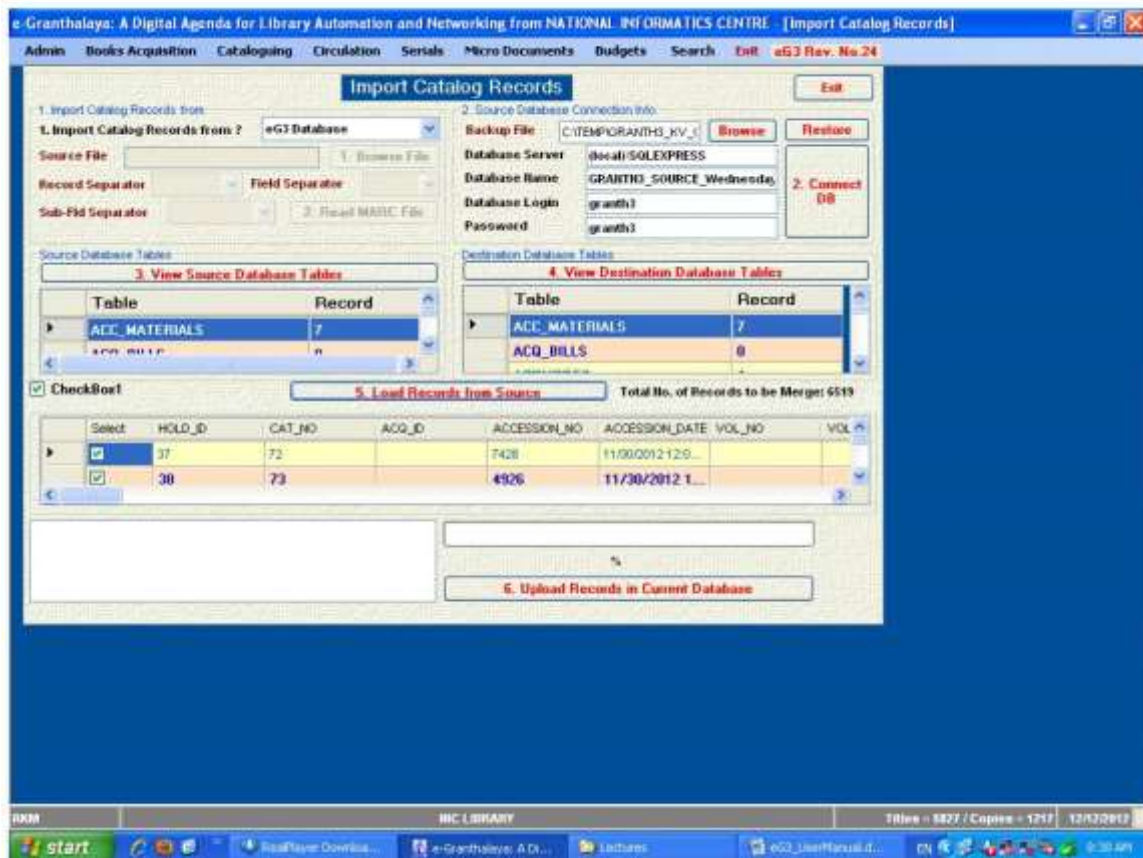Step 4: Press Connect DB button to connect the Source database.
Step5: Press VIEW SOURCE DATABASE Table Button
Step 6: Press VIEW DESTINATION TABLE button
Step7: Press LOAD RECORDS FROM SOURCE Button
Step 8: And finally press UPLOAD RECORDS button

NOTE: After import of records, it is advisable to check all the records imported. In case, you notice any error then you can restore your current database with your old backup taken before import and report the error to us. After import, you must restart the eG3.

Import from MARC File:

Step 1: Select option from drop-down ' MARC Communication File' Step 2: Browse MARC file and select it, press OK
Step 3: Press 'Read MARC file' button
Step 4: Finally press 'Upload Records' Button

NOTE: After import, you must check all the records, in case any error you must revert back your database by restoring it with latest backup and report the error to us.

7. Import Catalog Records from Excel:

This form is used to Import Catalog Data/Record from excel.

To Import the record, follow the steps:-

1. First you must browse excel sheet.
2. Excel sheet may have more than one sheet so select one by one sheet from
The drop down. After selecting the sheet grid will be filled with the selected sheet.
3. Now do start field mapping, select the column name from drop down according to
Your excel sheet.
    Do the mapping carefully otherwise your data will be imported in wrong manner.
4. Now press button "Import Records".

Press Button
"Import Records"

Chapter 11
Troubleshooting

11.1. Date Format Error – '*Conversion from string to date*…." Or "*Index is out of range…"* or any error during data entry.

During data entry if you receive the error message saying like '*conversion from string to date failed*' or "*Index is out of range*" or whenever error comes during data entry then it may be due to wrong SHORT DATE FORMAT set in your PC. In such case, you must exit the e-Granthalaya and must set the SHORTATE FORMAT as **MM/dd/yyyy** with "/" as date separator. Short date format can be set in Control Panel >> Region and Language Settings >> Press Customize Button>> Select Date Tab and then correct SHORT DATE FORMAT as given above. In the drop-down of SHORT DATE FORMAT either you can select the above format or Type the format as given above. Then press APPLY button and check today's date display on the same screen. Today's date must be displayed in: month, date and year fashion. For details, please read the Chapter 1.
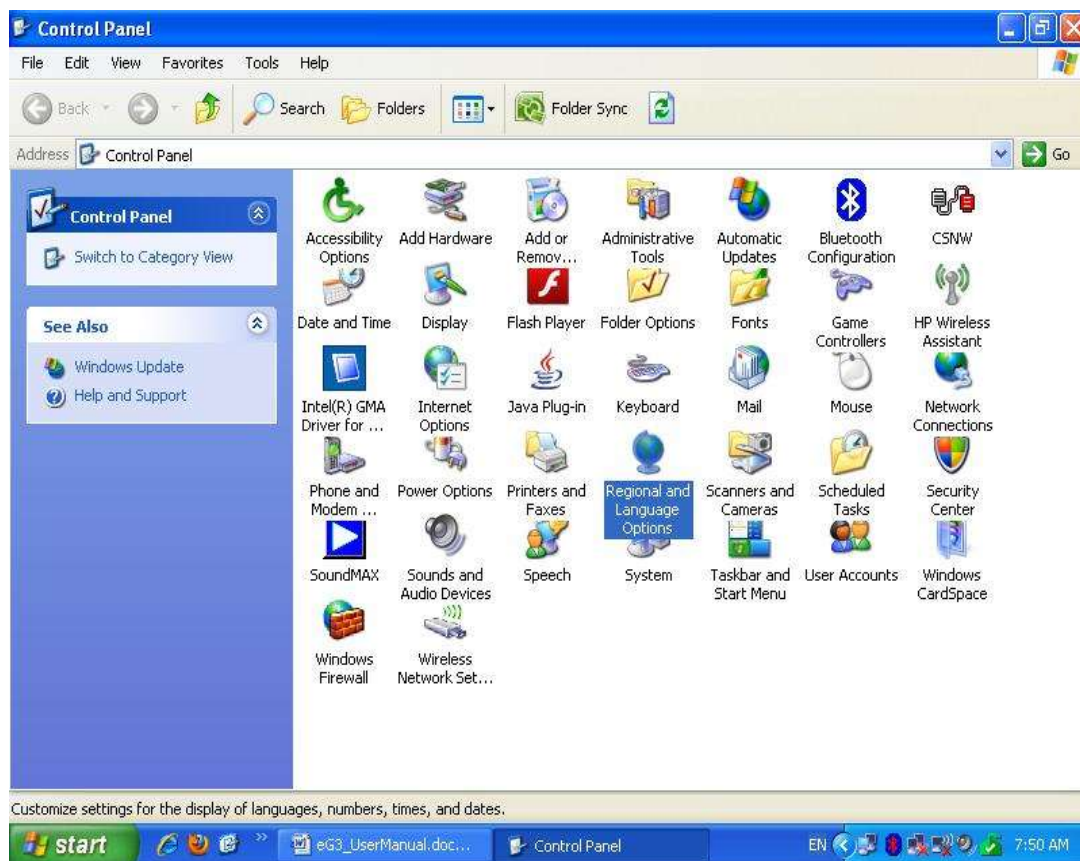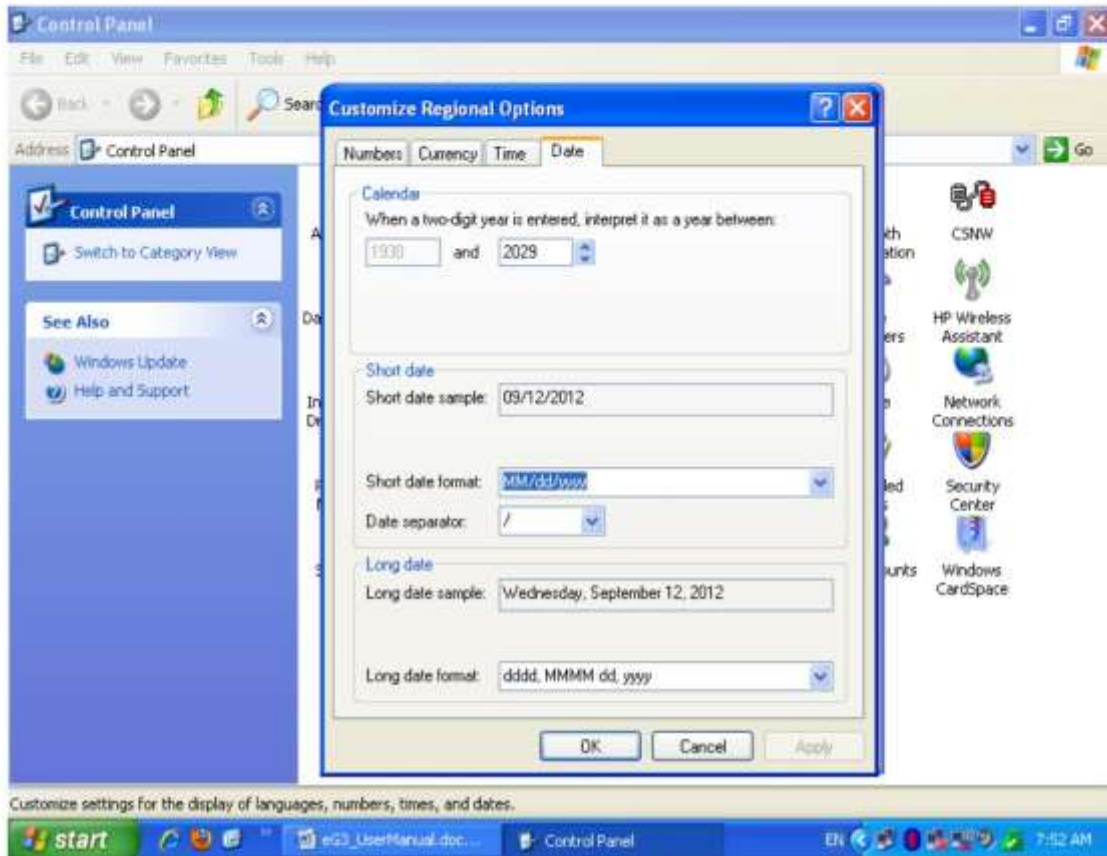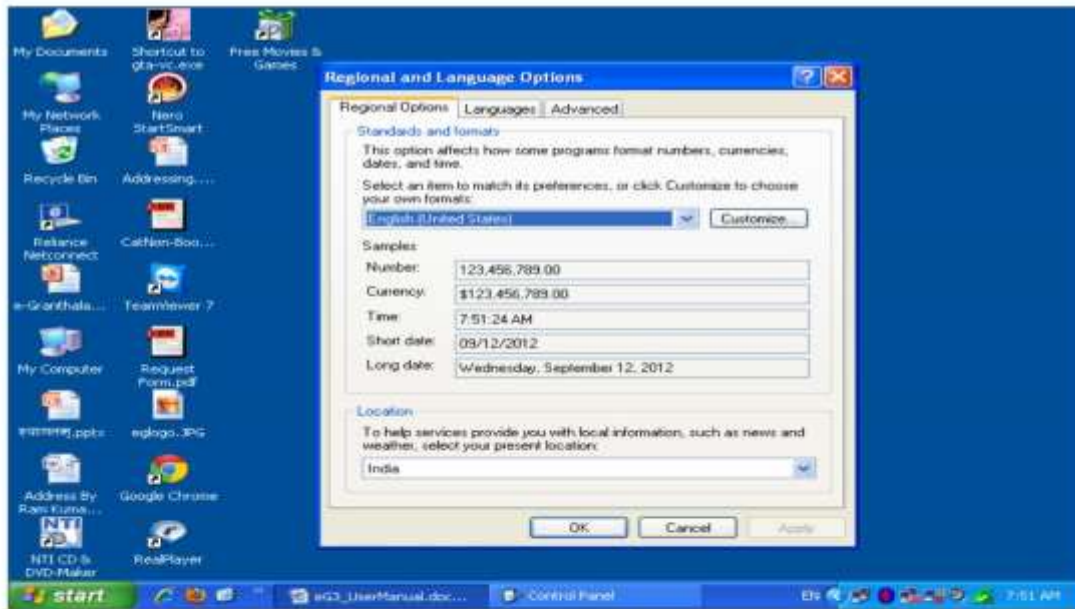
NOTE: In Win 7 Go to Control Panel >> Region and Language Settings >> Press
      Additional Settings Button and Type the date format in SHORT DATE
      FORMAT drop down, Then press APPLY button to save the settings.

11.2. Database Connectivity Error ("*Plz set the database connectivity*")

Many times you may face this situation – when software was running well last day and today when u started the software, it not starting and giving the message – " *Plz set the database connectivity*". This error means database is not available to eG3 Client Program and there is no database connectivity. There may be many reasons for this error. First you can check LAN connectivity if you have installed eG3 in Client Server Mode. If the database is in stand-alone in the same PC then there may be possibilities you SQL Server may get stopped. SQL service may be stopped in two situations:-

a.   When suddenly PC gets switched off without proper shutdown. In case you are not using UPS then this situation may arise.

b.   May be due to virus attack.

In this situation do the following steps to check the reason of database connectivity un-availability:-

When you run the application (eG3 Client Program) and message comes ' *Plz set database connectivity'*
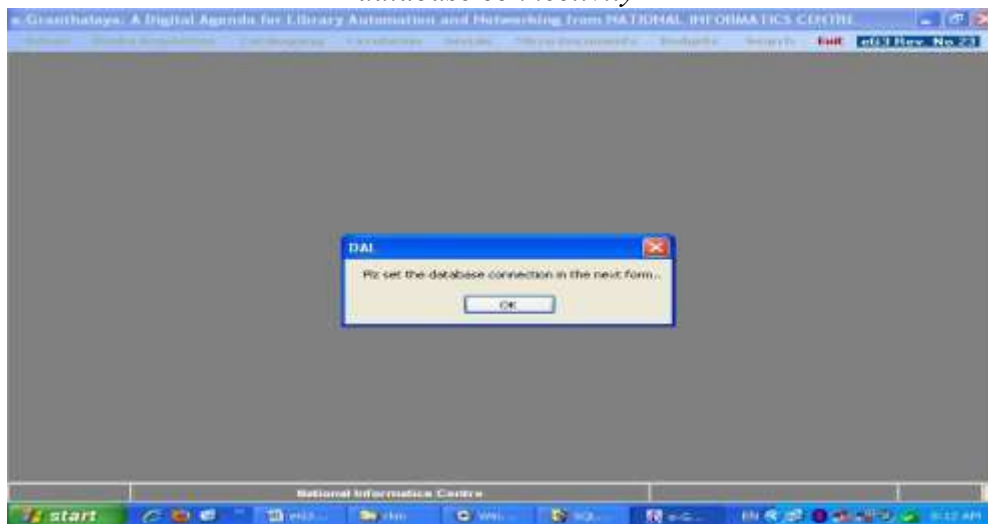
i.   Press OK button and finally following screen will appear:

ii.   Press TEST button and wait for message comes – if message comes –"*Database
         Connection Succeeded*" then close the message and Press SAVE button to save the
         connectivity. Close all the screens and re-run the software.

         In case when you press TEST buttons and message comes –'*Connection failed*' then
         check the four connection parameters given on the screen – Server Name, Database
         Name, database Login and Password. These four parameters are required to set the
         database connectivity. If you understand these four parameters are correct and still
         connection is not successful then check the following settings:-

iii.   Go to All Programs >> Microsoft SQL Server 2005 >> Configuration Tools >>
             SQL Server Configuration Manager. Following screen will appear:
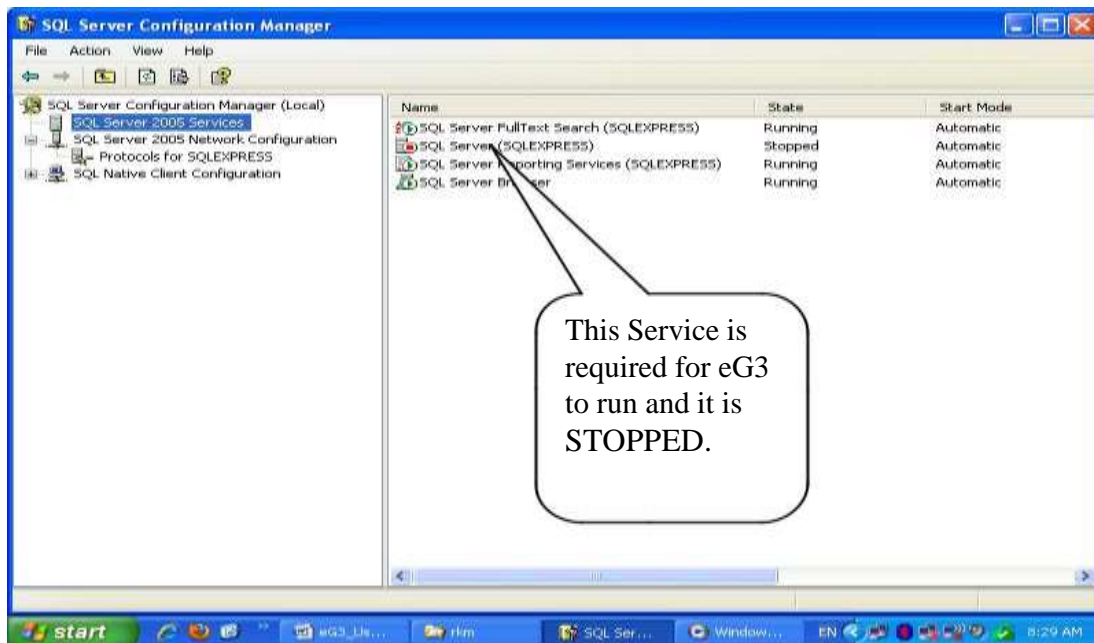
iv. As shown in the above screen the 'SQL Server' service is stopped. Right click the service item and press START to start the service..if it is started then you can run the eG3 successfully. **<u>If the service is not started then you need to format the PC and install eG3 software again and restore your database again from the backup. However, another solution is try to re-install MS SQL Server Manually with different Name of Instance – as given in the next heading.</u>**

<u>**NOTE**</u>: In the above situation when you installed the eG3 again as fresh and with new database and first time login the software after creating new account for Library and User, then you can following the following steps given in next heading to automatically restore your existing database from last backup using the utility given in Database Backup and Restore form under Database Utilities >> ADMIN.

11.3. How to Recover/Restore your Data from last Backup

Many times your Database/e-Granthalaya PC may get corrupt and e-Granthalaya does not run. In this case, when you will run eG3 it will give the error / message – "*Plz set the database connection in the next form*" – in this situation you can check the SQL Server Database Services Status as given in the above heading. If the services status is STOPPED then you can right click it and can try to START it. If it is started then your e-Granthalaya will work well. If it does not started then you need to re-install the Software after format or without format as given below.

MS SQL Server services may to corrupted/stopped basically due to two reasons – 1. Virus attack – so you must install latest anti-virus tools. And 2. When suddenly electricity goes and pc switched off. You must use UPS for such situation and you must properly shutdown the PC daily.

In case SQL Server Database Services not started then you need to do the following solutions:

a. You can re-install the SQL Server 2005 manually with different name of the SQL Instance (e.g. XYZ). Then you can create/restore GRANTH3 under this instance and accordingly change the name of instance in the database connection form of eG3 (instead of pc 'name/SQLEXPRESS' you must provide new instance name e.g. 'pc name\xyz').

b. You can un-install all the components of MS SQL Server 2005 from control panel >> Add/Remove Programs. Then remove the physical folder of Microsoft SQL Server from C:\Program Files. And then delete MS SQL Server registry by running the command 'regedit' at run command.

c. You can format the PC and Re-install the OS, and then e-Granthalaya from CD. Once you install eG3 successfully, for the first time login the eG3 then you can restore your current database automatically as given in the following section.

RESTORE DATABASE AUTOMATICALLY FROM LAST BACKUP

1. After re-installation of OS/MS SQL Server 2005 and eG3 – run the e-Granthalaya software and login it to access all the modules.
2. Go to ADMIN >> Database Utilities >> run Database Backup form from following menu
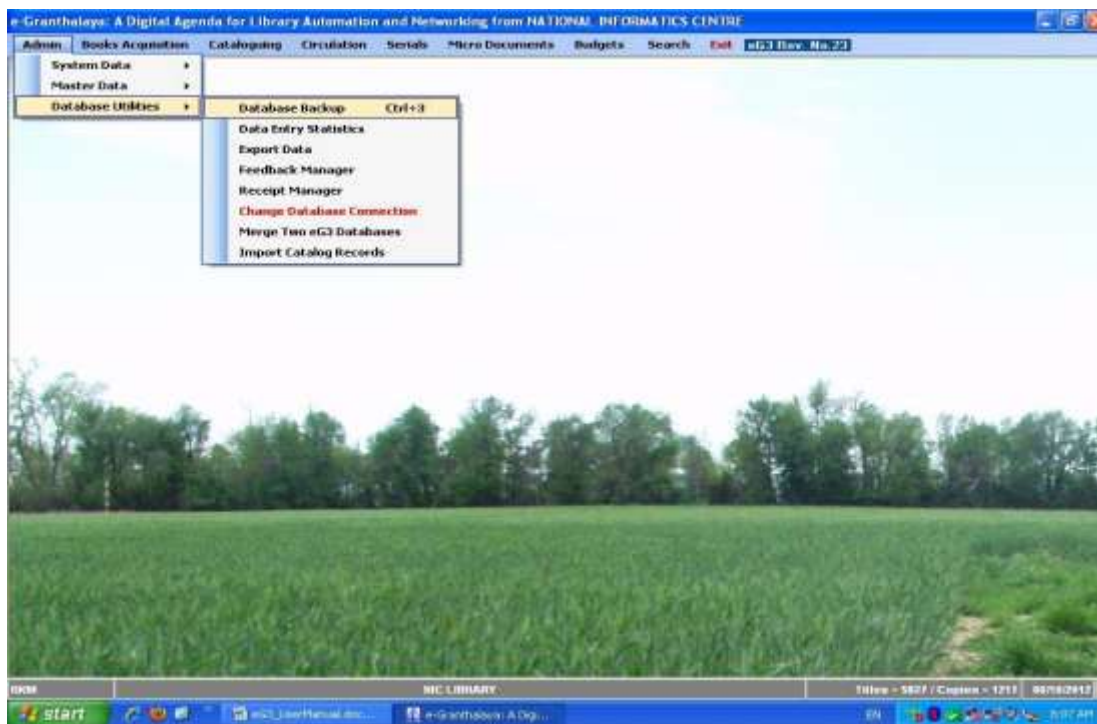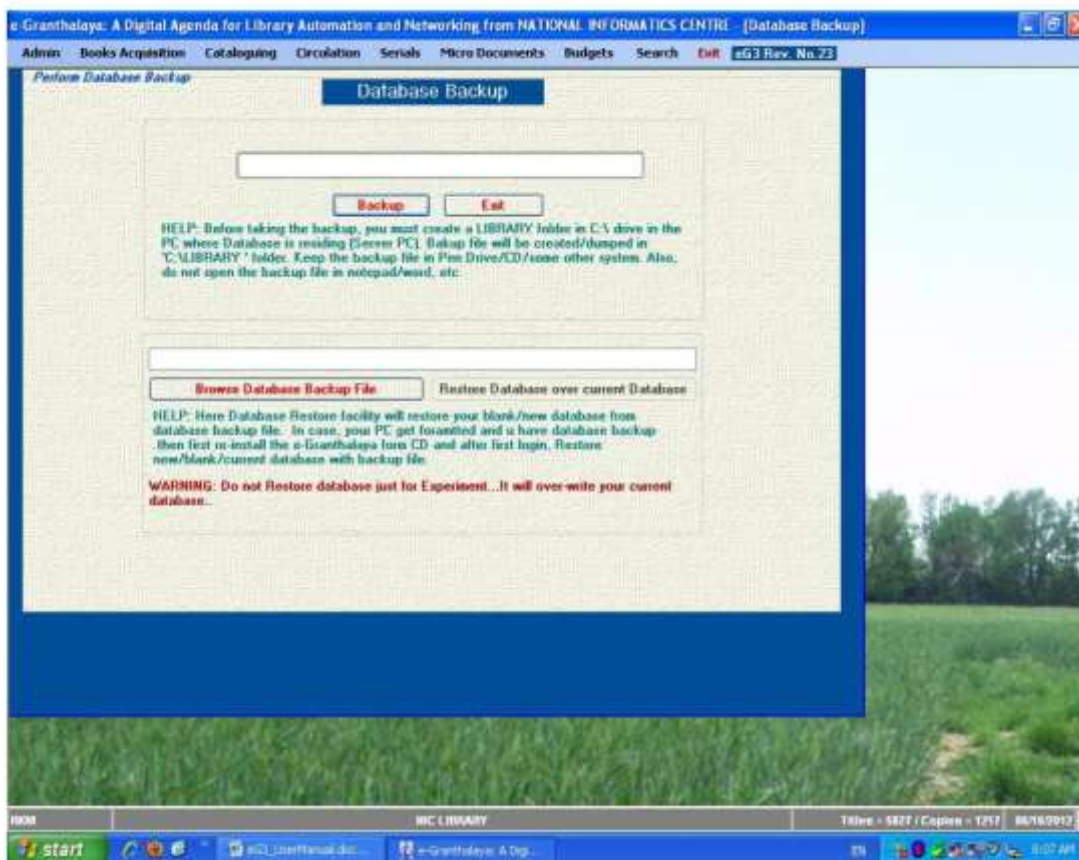
3. Click the 'Browse Database backup file' button and select database backup file, press OK.
4. Press 'Restore Database…..' button from the above screen. It will restore your blank database with last backup. Close the e-Granthalaya and Re-run it..and check all your records.

NOTE: This feature must be used only when it is required as it will over-write existing database of eG3.

11.4. When PC gets Crashed and No Database Backup

In many situation, when your PC gets crashed and you do not have taken the backup of your database, in this situation, before format of the PC you can recover your database with the following steps:

1. Go to 'C:\Program Files \ Microsoft SQL Server \ MSSQL.1\MSSQL\Data' folder or where your SQL Server folder exists – you will find DATA folder where all the database files exists. Each database contains two files – one is *.mdf* and another is *.ldf* file (e.g. *GRANTH3.mdf* and *GRANTH3_Log.ldf*)
2. Copy these two files of your database name (*mdf / ldf*) and keep these files at safe place.

3. These two files contain your all data which can be restored later just by copy and paste on the same location after system restore. For copying these files again at the same location, you must stop the SQL Services