USER MANUAL

ezlib

--Library Automation Made Easy

See it done

Do it yourself

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Part 1: Users and their tasks

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1 - Ordering
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GUYS4HOTSCRIPTS

(from left to right) Bala Krishna, Bhargava Phani, Vinay Kumar, Krishna Kishore sir (Project Guide), Srinivasa Rao, Rajesh.

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About us

Guys4Hotscripts -- The team from computer science and Engineering department of batch 2002-2006 always striving hard to find solutions to problems. In 3rd year we took up two projects and completed them succesfully, one is "CMT - Excel with Ease" and other is "Lab Examination Maintenance".

Now has completed the Software for Library Automation -- "ezLIB - Library Automation Made Easy"

Acknowledgments

We are very grateful to our esteemed project guide Sri.K.V.Krishna Kishore,Assoc.Professor, CSE and Sri. J. Anand Chandulal, Professor HOD, CSE for their cooperation in making our project success.

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HOW TO USE THIS BOOK

It's as Easy as 1-2-3

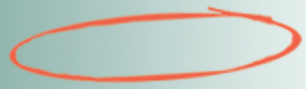
Each part of this book is made up of a series of short, instructional lessons, designed to help you understand basic information that you need to get the most of your computer hardware and software.

Click: Click the left mouse button once.

Double-click: Click the left mouse button twice in rapid succession.

Right-click: Click the right mouse button once.

Pointer Arrow: Highlights the item on the scrren you need to point to or focus on in the step or task.



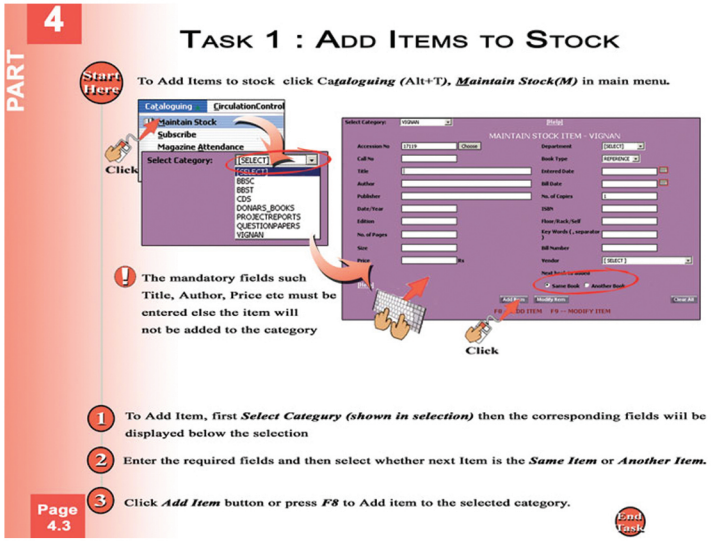
Selection: Highlights the area onscreen discussed in the step or task.

Click & Type: Click once where indicated and begin typing to enter your text data.

Tips and Warnings give you heads-up for any extra information you may need while working.

2 Each task includes a series of quick, easy steps designed to guide you through the procedure.

1 Each step is fully illustarted to show you how it looks on screen.



3 Items that you select or click in menus, dialog boxes, tabs, and windows are shown in **Bold** Information you type is in a `special font`.

Next Step **Next Step:** If you see this symbol, it means the task you're working on continues on the next page.

End Task **End Task:** Task is complete

Introduction to ezLIB

ezLIB is a state-of-art integrated library automation with multi-tier, mutli-user web-based system using a single server via the web. Uses open-source and Java based technologies for scalability, reliability and affordability.

The functional modules of ezLIB are:
Acquisitions, Cataloguing, Circulation control, Account Maintenance, Report Generation, System Administration, OPAC(Online Public Access Catalogue Search), Utilities.

Features of ezLIB

Software is Barcode enabled.
Backup and Restore facility.
Online Help Available.
Report Generation with Export to excel.
Account Holder Identity Creation.
Advanced search facility.
Bill & Fine Maintenance.
No-Dues certificate generation.

PART I

Users and thier tasks

ezLIB is an user friendly application with many features that are used by a number of users. The users identified in general library scenario are classified into three types based on the task of the library staff. The tasks identified are Administration,Data entry and Circulation control.

Based on these tasks the library staff are classified into

Administrator (Admin) -- for administration tasks
Data Entry Operator (DEO) -- for Data entry and
Issue-In-Charge (IIC) -- for Circulation control

The services provided by the library are used by the “Account Holders”. Each Account Holder is provided an account to logon and use the application.

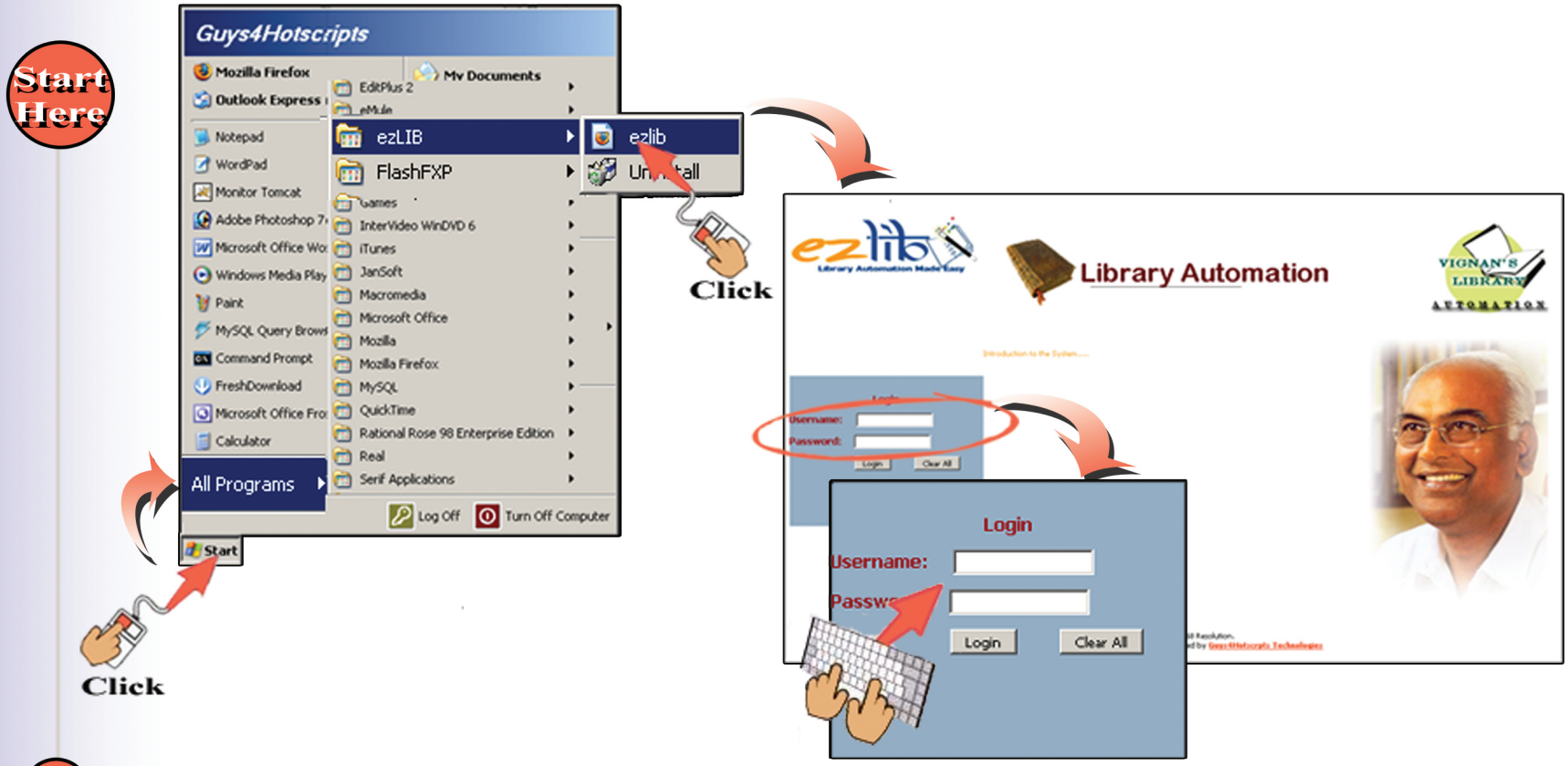
Finally the other set of users include the “Vendors”.

This part deals with Users identified in the above and their responsibilities/tasks.

TASKS

TASK#		PAGE#
1	Logging into the system	1.3
2	Logging out of the system	1.5
3	Tasks for DEO	1.6
4	Tasks for IIC	1.7
5	Tasks for Admin	1.8
6	Services for Account Holder	1.9
7	Change Password	1.10
8	Vendor Add Details	1.11

TASK I : LOGGING INTO THE SYSTEM

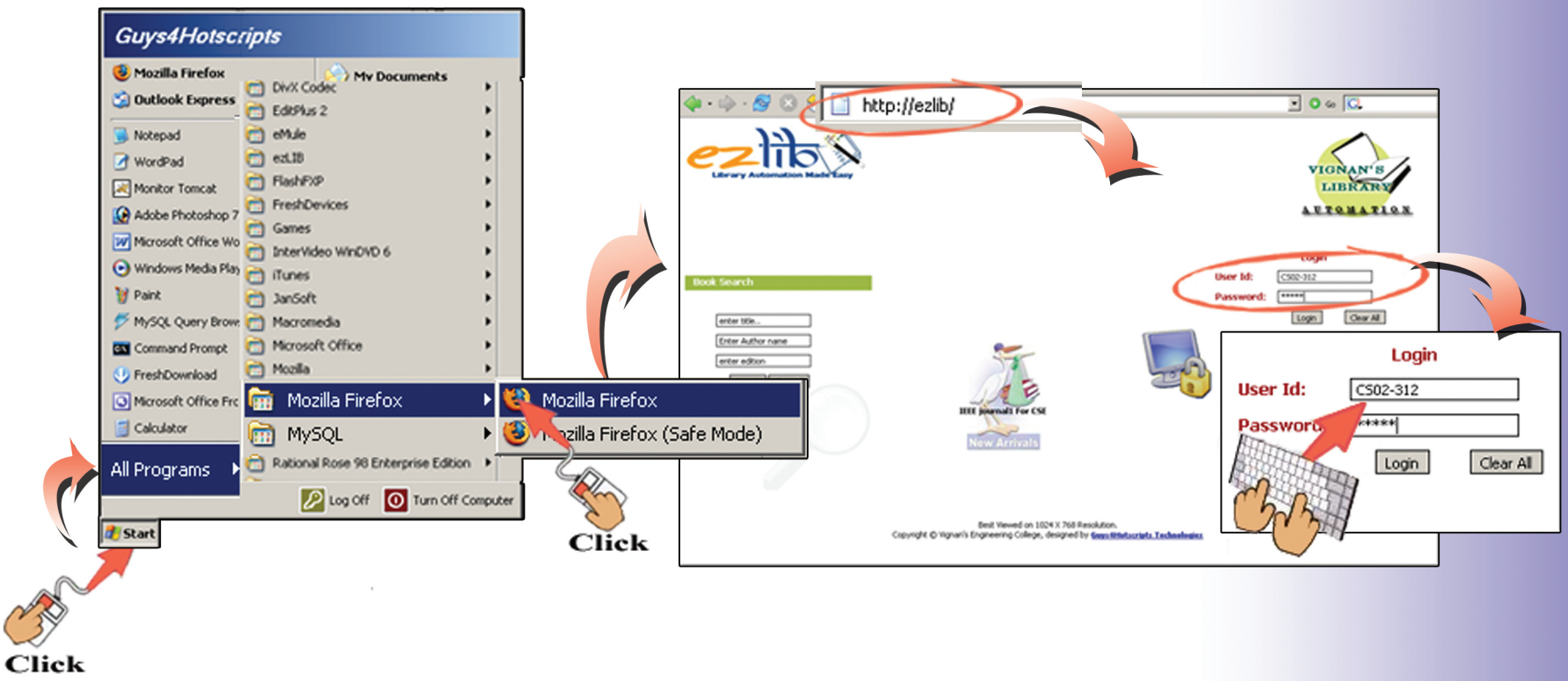


1. For Admin, DEO or IIC to login , goto **Start, Programs, ezLIB, ezlib.**

2. Enter ***Username*** and ***Password*** and click ***Login*** .

3. **Based on the privilege of the user the page will be redirect, which will be shown in coming tasks.**

Next Step



4. For Account holder to login , goto **Start, Mozilla Firefox, Mozilla Firefox.**

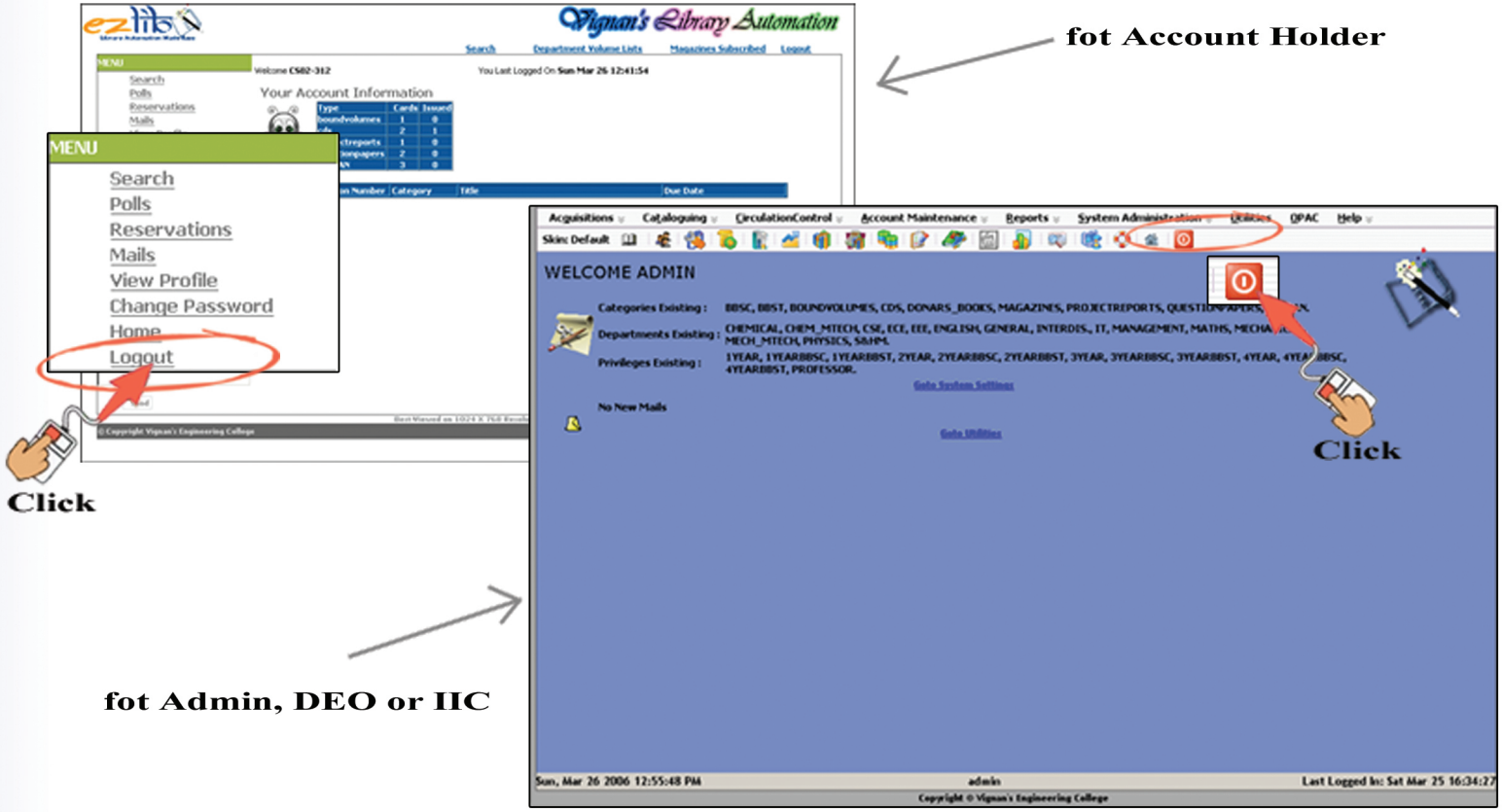
5. Enter ***http://ezlib*** in the Address bar and it redirects to ***Login page.***

6. Enter ***Username*** and ***Password*** and click ***Login*** to login to the account.

End Task

TASK 2 : LOGGING OUT OF THE SYSTEM

Start Here



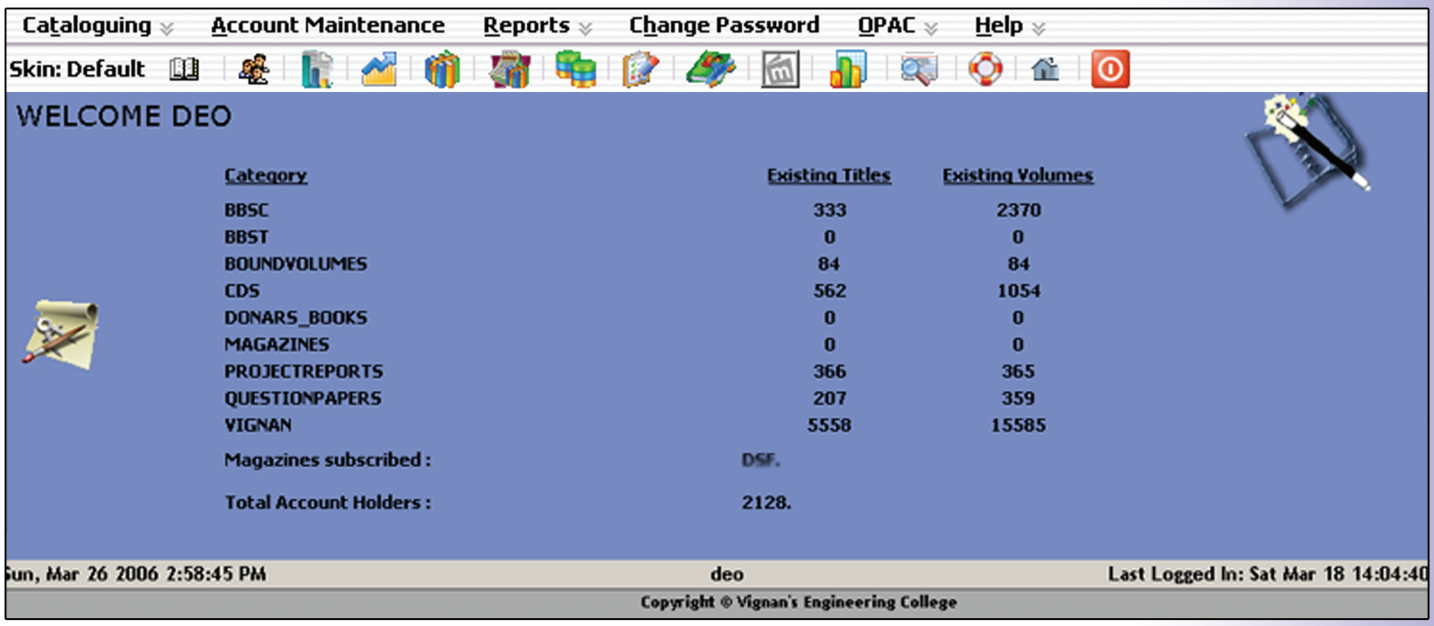
1. For Admin, DEO or IIC to logout , click .

2. For Account Holders click ***Logout*** from Menu.

End Task

Task 3 : Tasks for DEO

Start Here



The tasks for DEO include

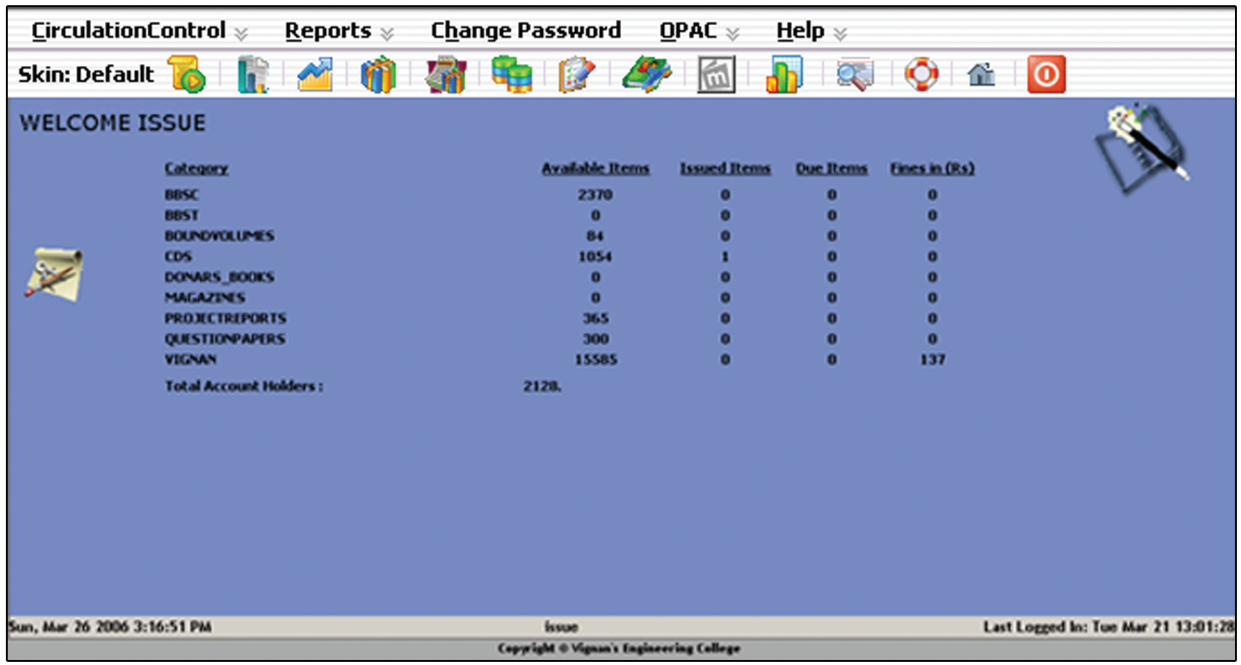
- Cataloguing
- Account Maintenance
- Reports
- Change Password and
- OPAC

These tasks will be explained in detail in the next parts.

End Task

TASK 4 : TASKS FOR IIC

Start Here



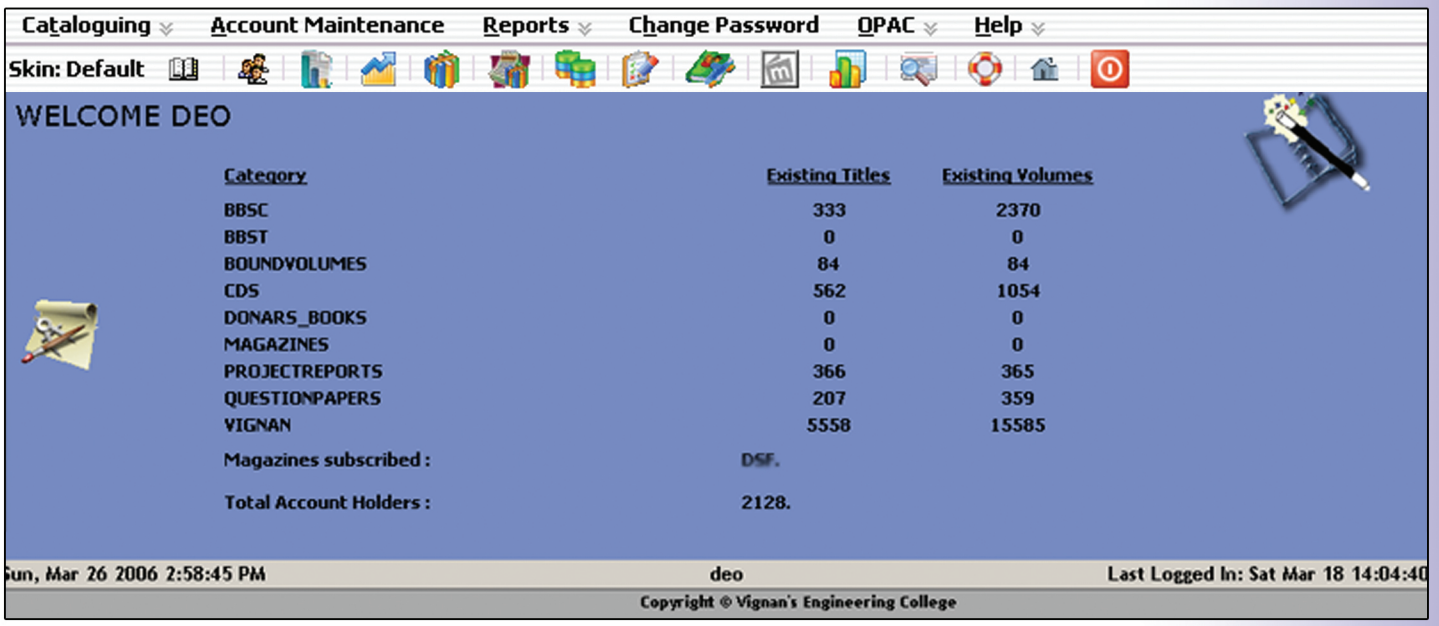
The tasks for IIC include

- Circulation control
- Reports
- Change Password and
- OPAC

These tasks will be explained in detail in the next parts.

End Task

Task 5 : Tasks for Admin



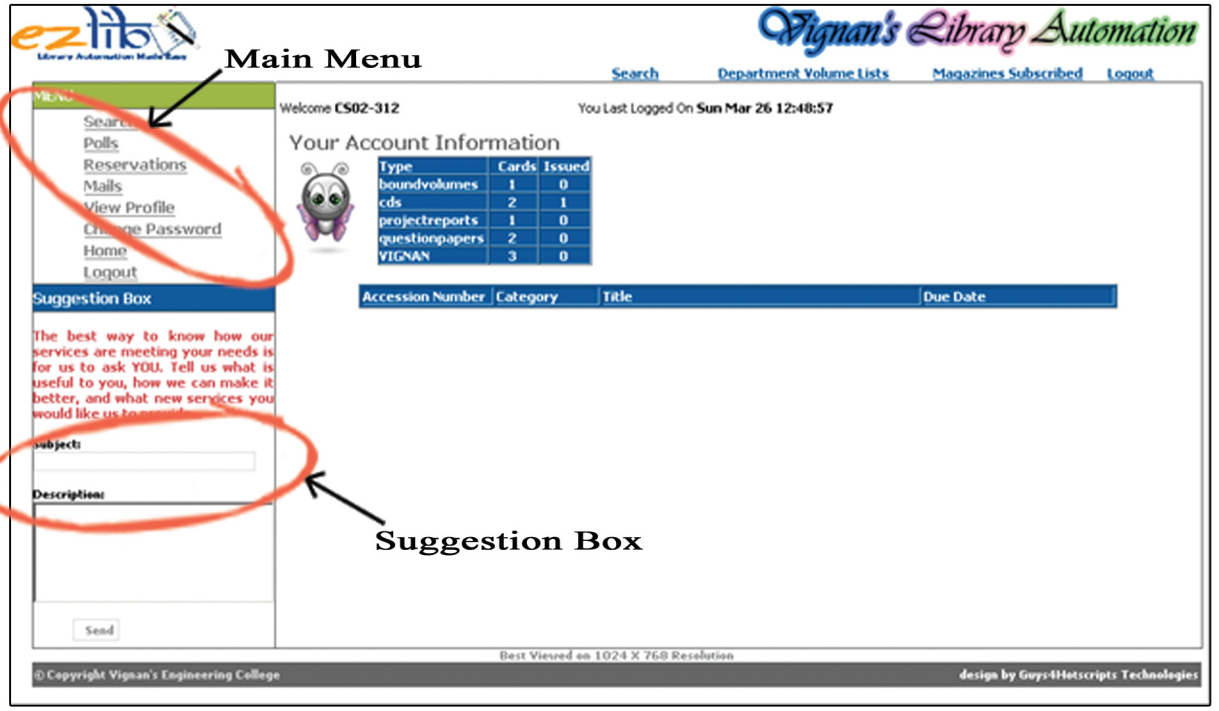
Apart form The tasks for DEO & IIC Admin has the following set of tasks

- Acquisitions
- System Administration and
- Utilities

These tasks will be explained in detail in the next parts.

Task 6 : Services for Account Holders

Start Here



The Services for Account Holders include

- Search
- Polls
- Reservations
- Mails (only for account holders with mail privilege)
- Update Profile
- Change Password
- Department Volume Lists and
- Magazines Subscribed.

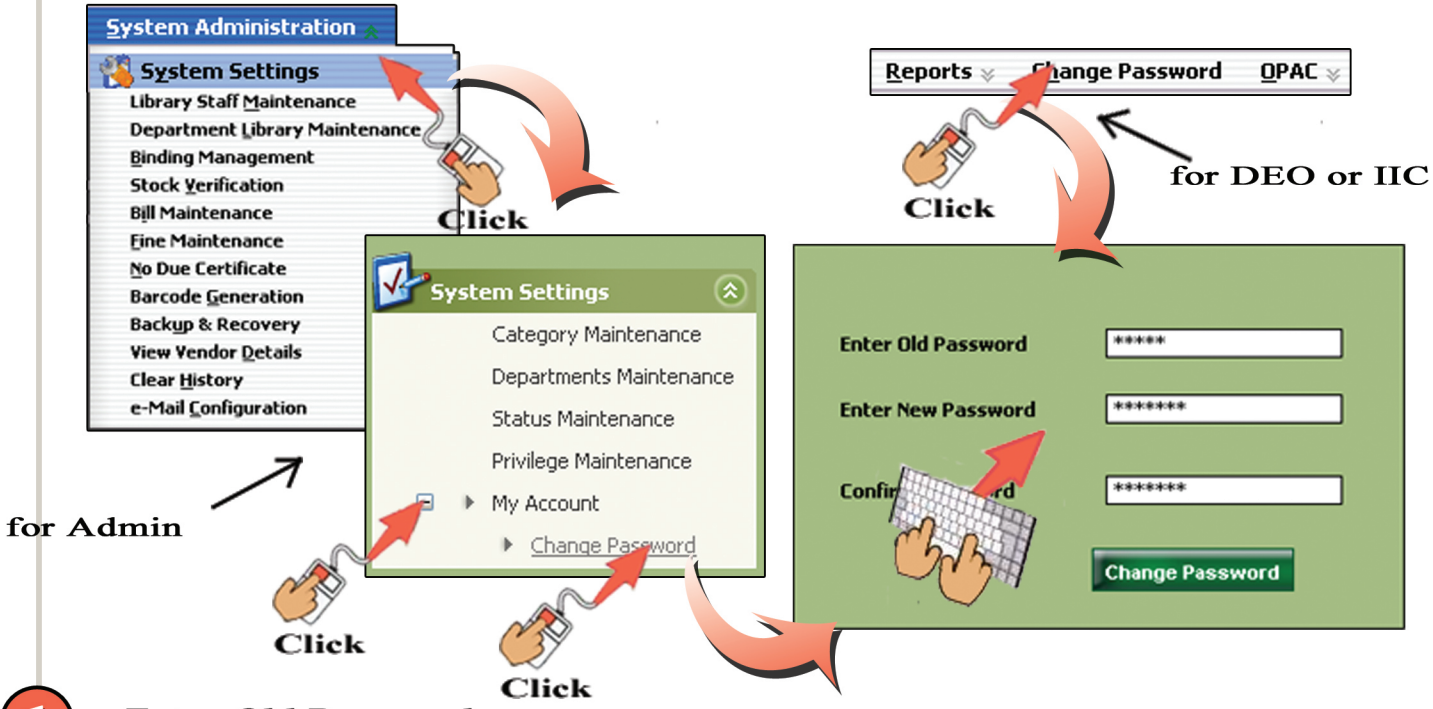
End Task

Task 7 : Change Password

Start Here

To change password for Admin click ***Sysem Administration*** (Alt+S)**,*System Settings (y)*** in main menu, ***My Account, Change Password*** in left pane.

To change password for DEO or IIC click ***Change Password***(Alt+h) in main menu.



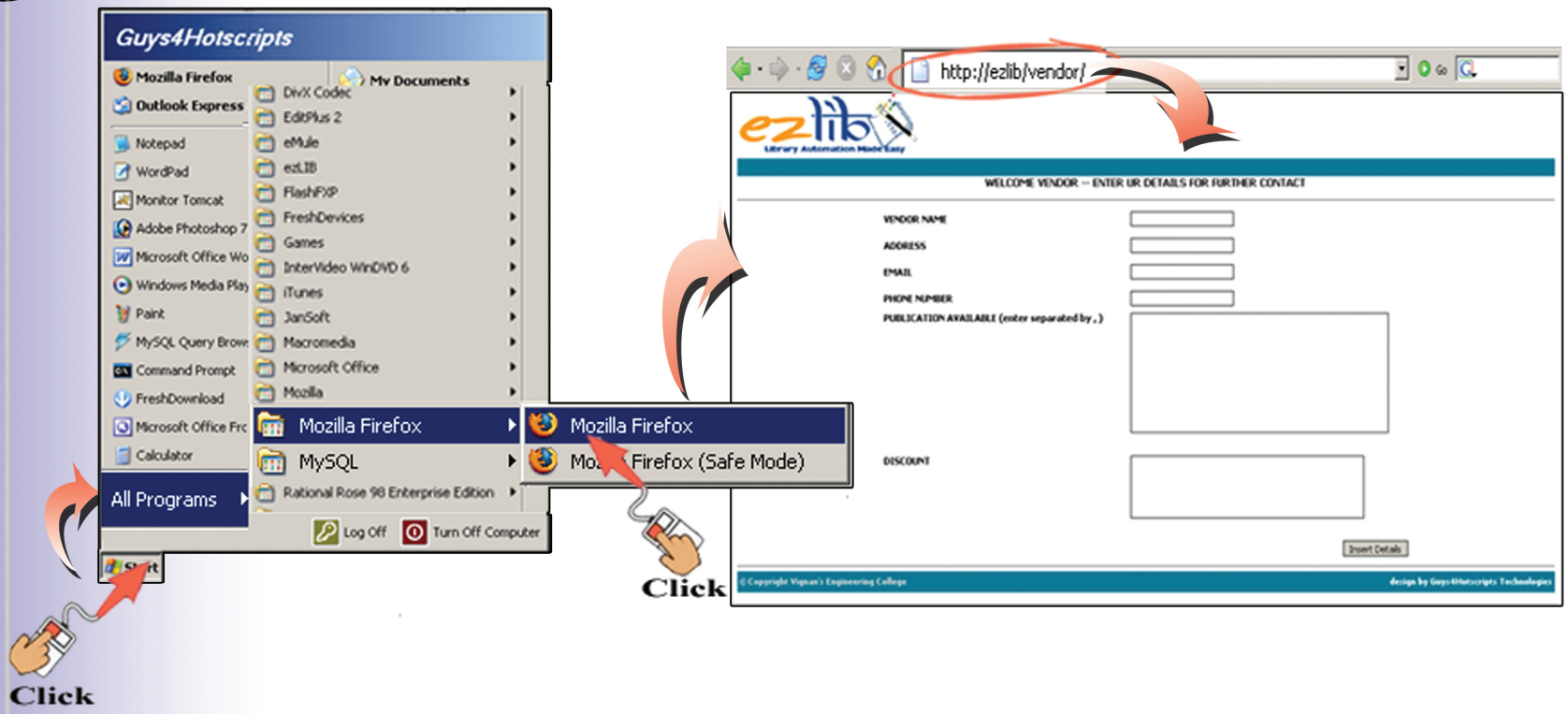
! the new password entered and password entered for confirmation should match.

1. Enter ***Old Password.***
2. ***Enter New Password , Confirm Password.***
3. Click Relogin to activate change in password for the account

End Task

TASK 8 : VENDOR ADD DETAILS

Start Here

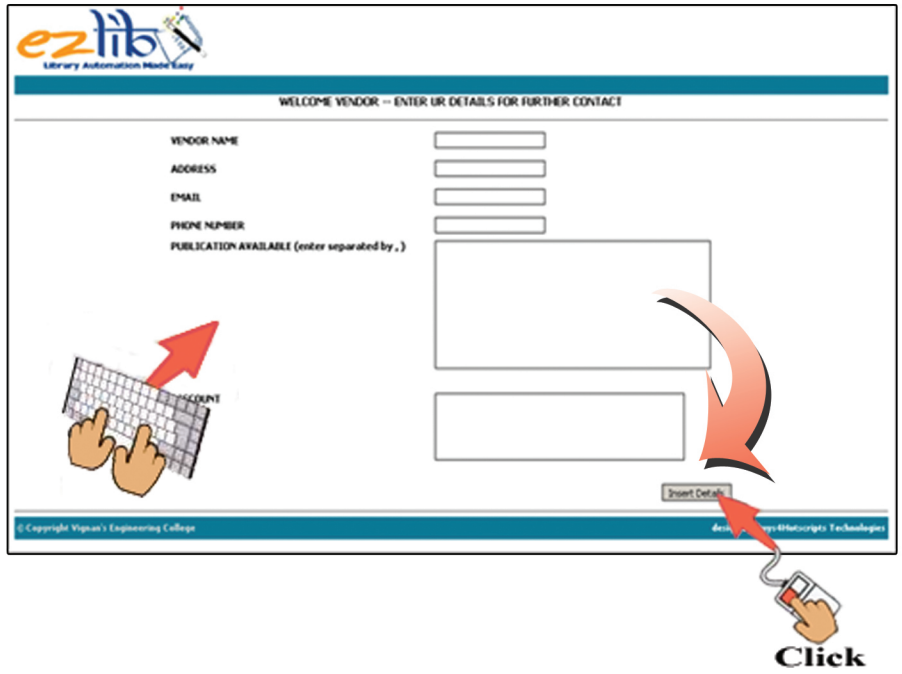


1. For vendor to add details, goto **Start, Mozilla Firefox, Mozilla Firefox.**

2. Enter ***http://ezlib/vendor*** in the Address bar and it redirects to ***Login page.***

Next Step

This module is for the vendors who visit the library for orders. They can enter their details on this, so that Admin can view the details in View Vendor Details discussed in in PART3 and can make an order in future if necessary.



All the Fields are mandatory, no fields should be kept empty.

3 Enter ***Vendorname, Address, Email, Phone number, Publications Available*** and ***Discount offered*** and click ***Insert Details.***

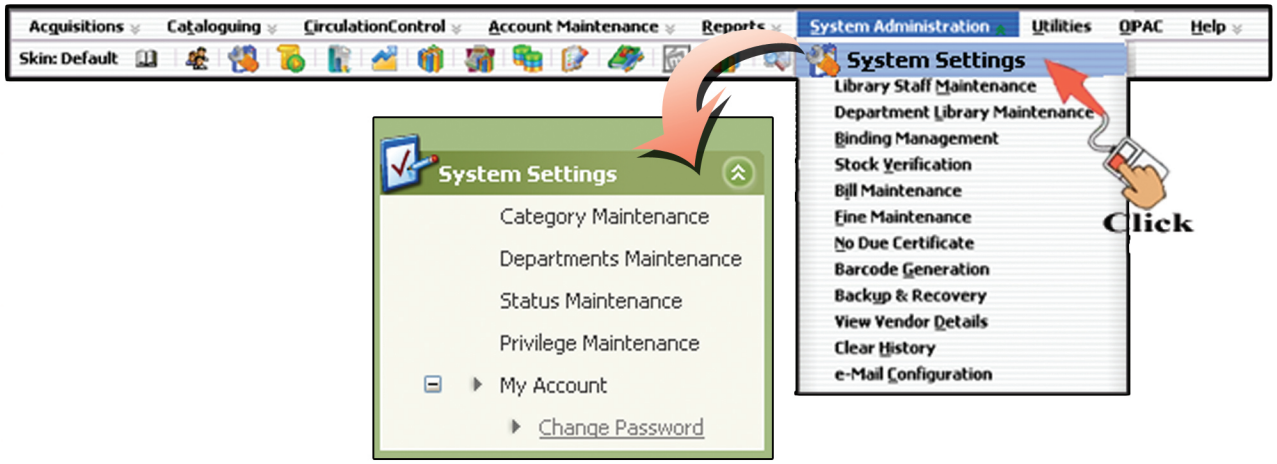
End Task

PART 2

CONFIGURING EZLIB

ezLIB provides system settings that are meant for initial configuration of the system which are necessary to run the system. The necessary configurations to be performed are divided into four categories, they are

Category Maintenance -- these include different stock registers available
Department Maintenance -- these include different departments available
Status Maintenance -- these include different status that can be assigned to library items
Privilege Maintenance -- these include different privileges for the account holders



Go to ***System Administration (Alt+S)*** -> ***System Settings(y)*** to Configure ezlib.

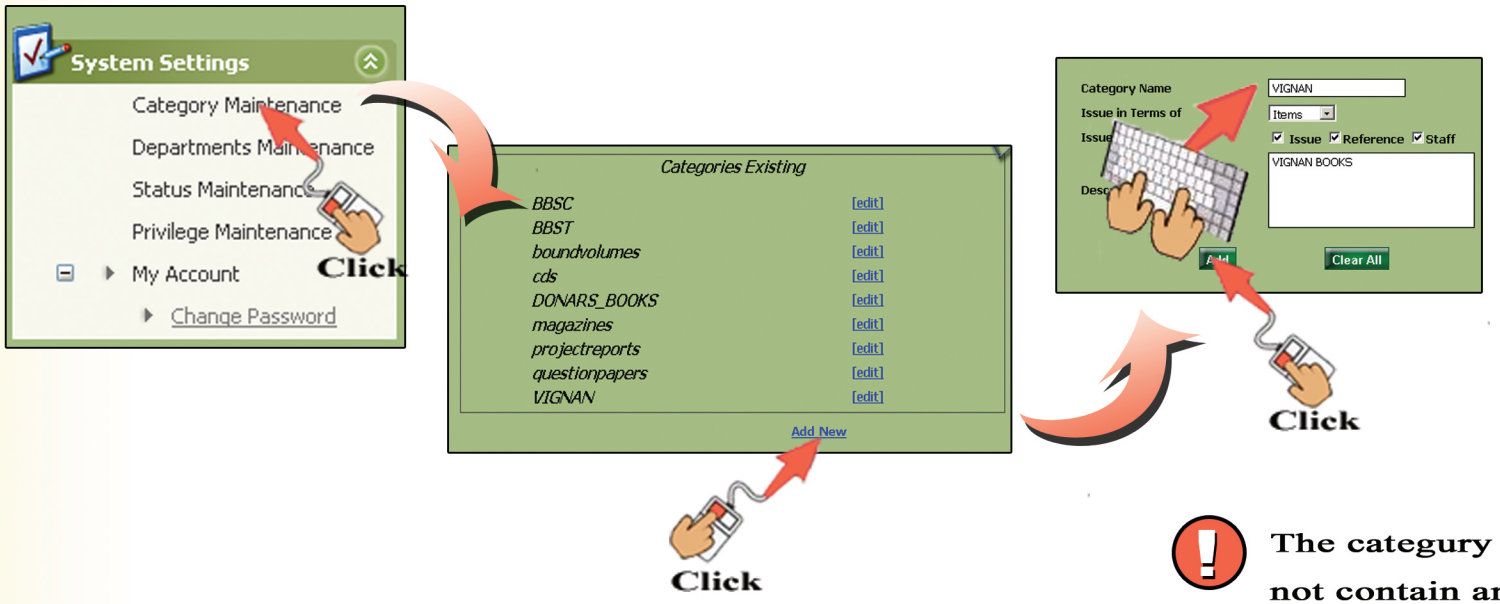
Tasks

Task#		Page#
1	Add New Category	2.3
2	Edit existing Category	2.4
3	Add New Department	2.5
4	Edit Existing Department	2.6
5	Delete Department	2.7
6	Add New Status	2.8
7	Edit Existing Status	2.9
8	Delete Status	2.10
9	Add New Privilege	2.11
10	Edit Existing Privilege	2.12
11	Delete privilege	2.13
12	Modify Account Holders Privilege	2.14

TASK 1 : ADD NEW CATEGORY

Start Here

To Add New Category click ***Sysem Administration*** (Alt+S)***,System Settings (y)*** in main menu***,*** ***Category Maintenance*** in left pane.



The categury name should not contain any spaces or symbols like '&'.

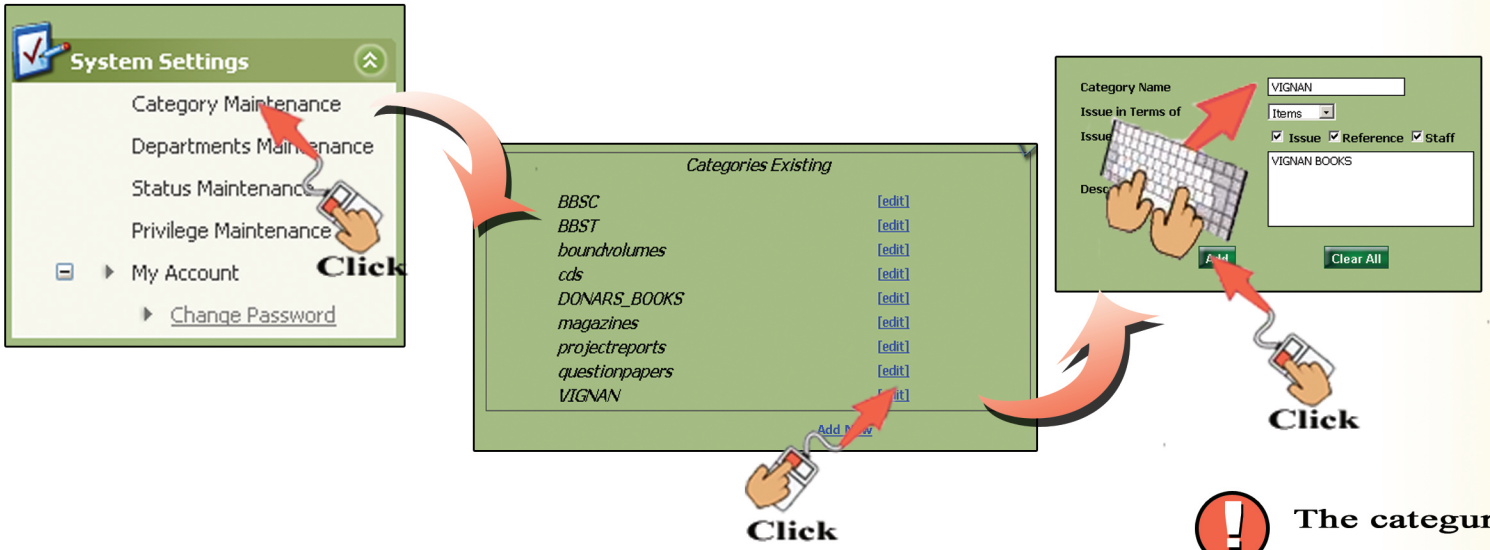
1. Click ***Add New.***
2. ***Enter Category Name , Issue in Terms of (items or amount), Issue Types (Issue, Staff, Reference) and Description*** (optional).
3. Click ***Add*** to create the category.

End Task

Task 2 : Edit Existing Category

Start Here

To Edit existing Category click ***Sysem Administration*** (Alt+S)***,System Settings (y)*** in main menu, ***Category Maintenance*** in left pane.



! The categury name should not contain any spaces or symbols like '&'.

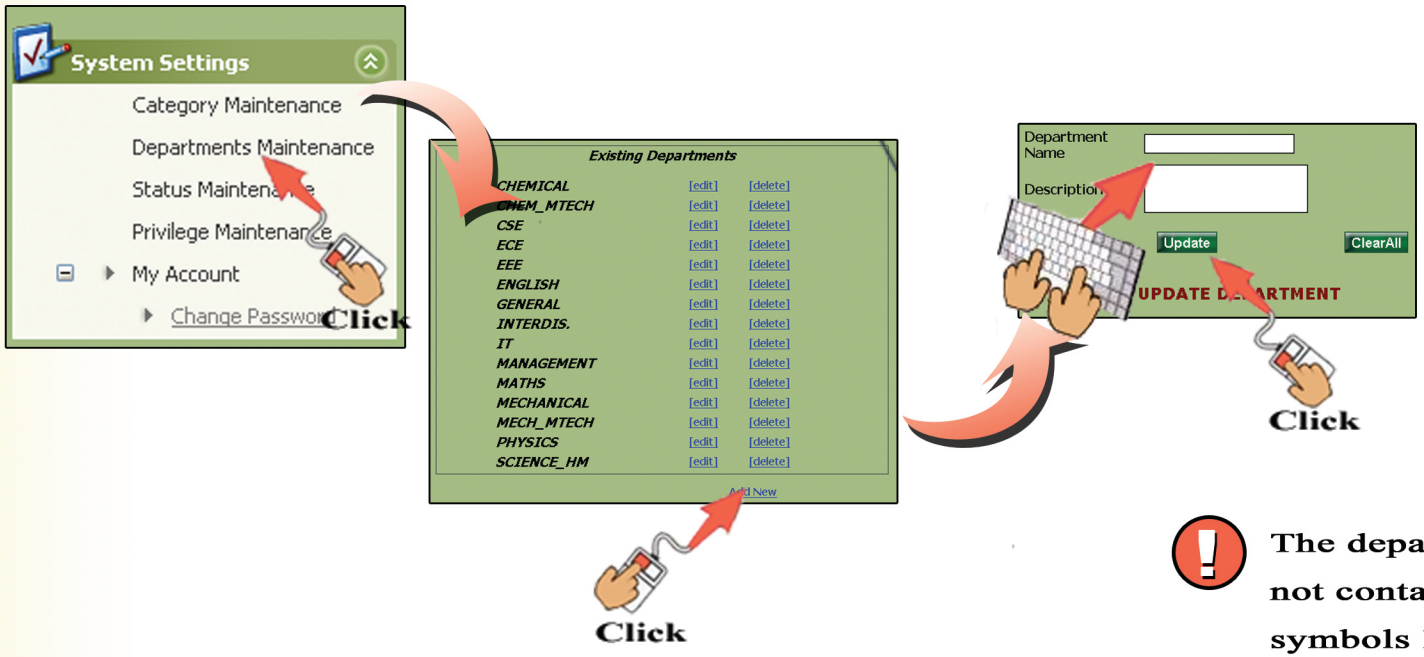
1. Click ***edit.*** beside the category you want to edit.
2. Modify ***Category Name , Issue in Terms of (items or amount), Issue Types (Issue, Staff, Reference) and Description*** (optional).
3. Click ***edit*** to modify the category.

End Task

TASK 3 : ADD NEW DEPARTMENT

Start Here

To Add New Department click ***Sysem Administration*** (Alt+S)**,*System Settings (y)*** in main menu**,** ***Departments Maintenance*** in left pane.



The department name should not contain any spaces or symbols like '&'.

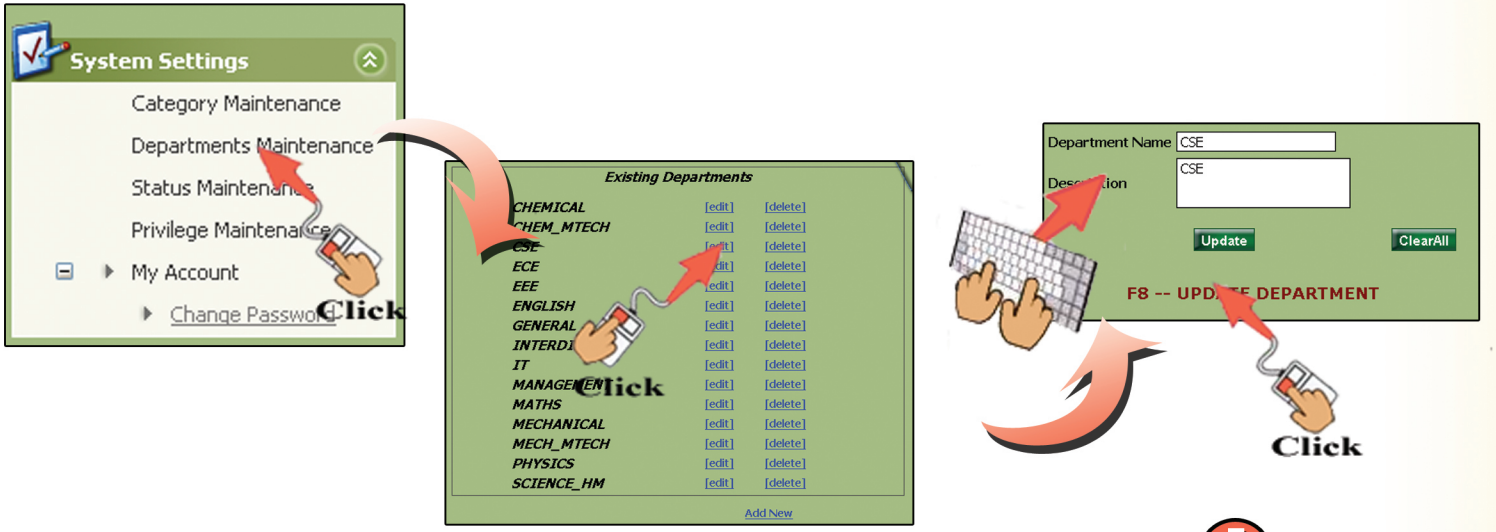
1. Click ***Add New.***
2. ***Enter Department Name , and Description*** (optional).
3. Click ***update*** to create the department.

End Task

Task 4 : Edit Existing Department

Start Here

To Edit existing department click ***Sysem Administration*** (Alt+S)**,*System Settings (y)*** in main menu, ***Departments Maintenance*** in left pane.



! The department name should not contain any spaces or symbols like '&'.

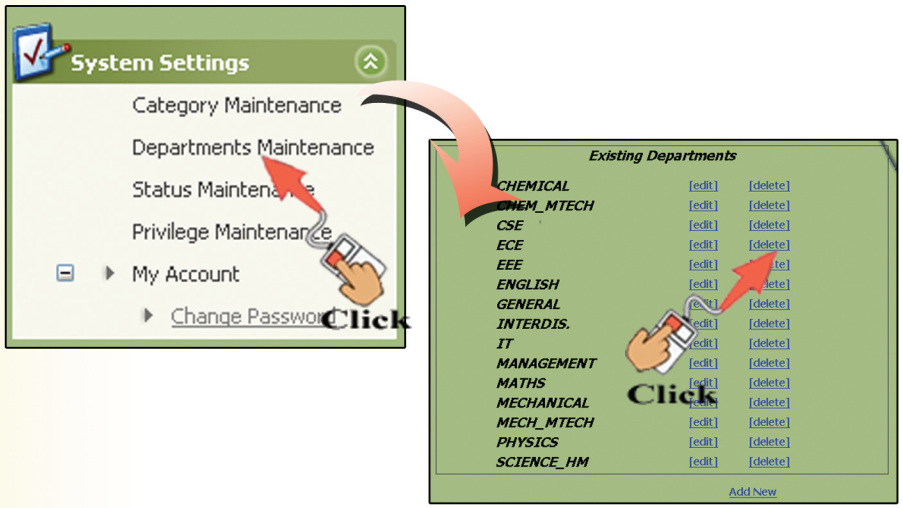
1. Click ***edit.*** beside the department you want to edit.
2. Modify ***department Name , and Description*** (optional).
3. Click ***update*** or F8 to modify the department.

End Task

TASK 5 : DELETE DEPARTMENT

Start Here

To delete a department click ***Sysem Administration*** (Alt+S)**,*System Settings (y)*** in main menu, ***Departments Maintenance*** in left pane.



The department will be deleted only if no items exist under the department.

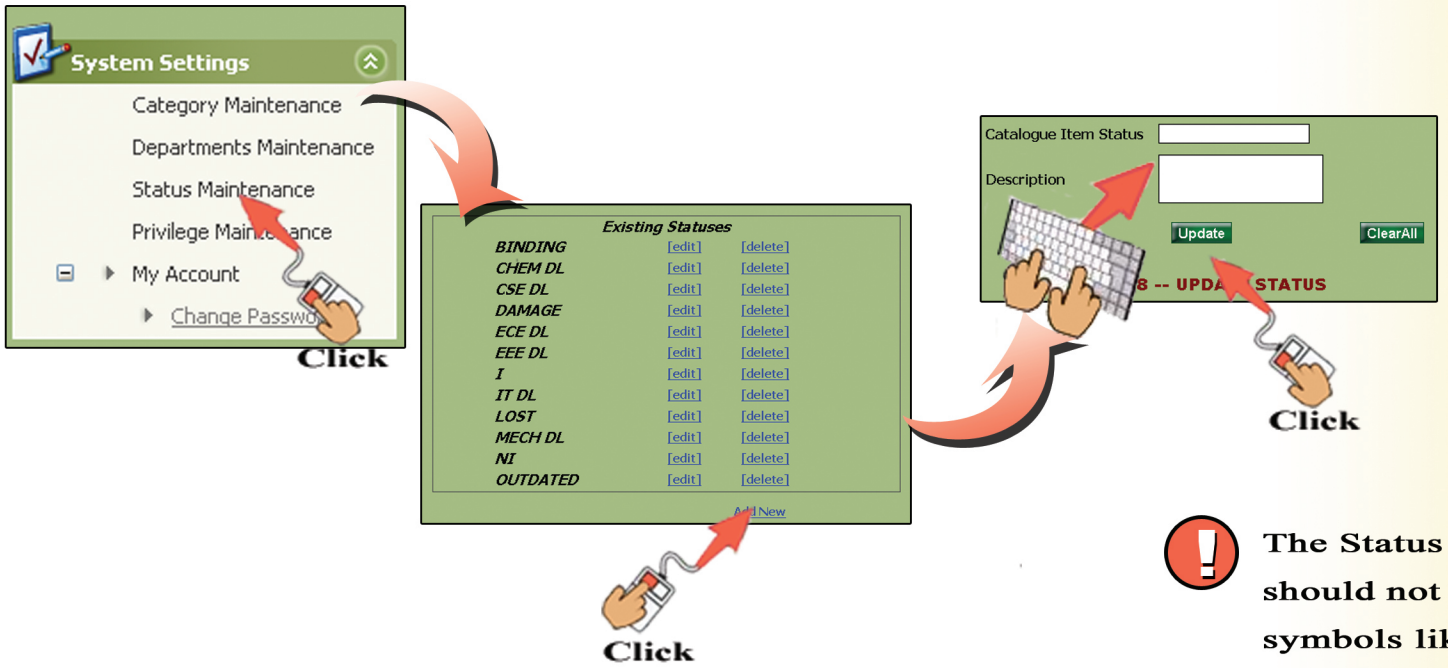
1. Click ***delete*** beside the department you want to delete.
2. The department will be deleted if no items exist under the department..

End Task

TASK 6 : ADD NEW STATUS

Start Here

To Add New Status click ***Sysem Administration*** (Alt+S)***,System Settings (y)*** in main menu, ***Status Maintenance*** in left pane.



! The Status name should not contain symbols like '&'.

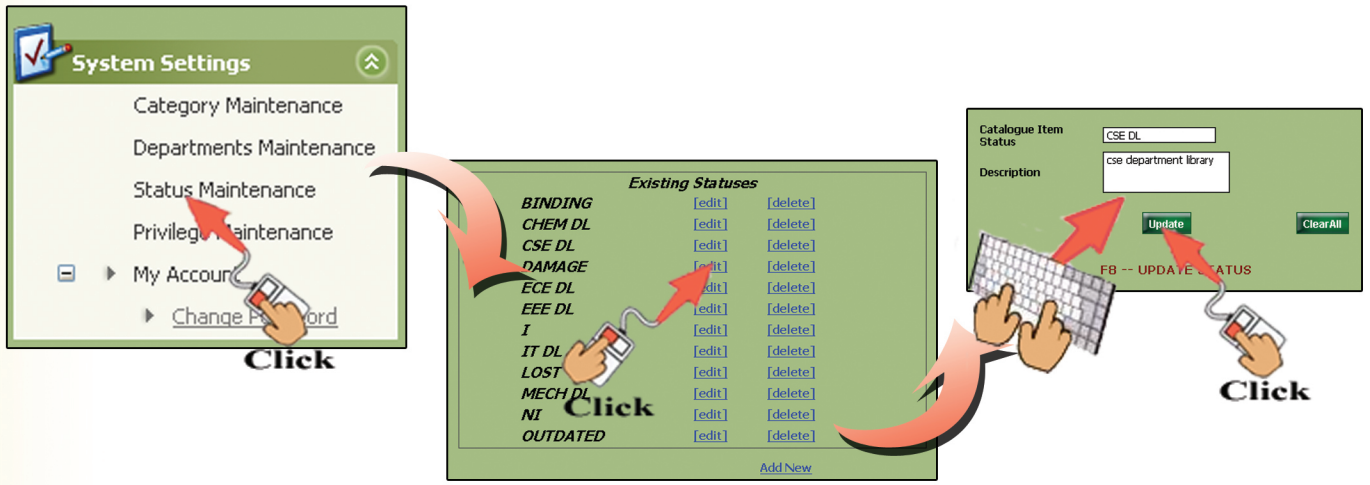
1. Click ***Add New.***
2. ***Enter Status Name , and Description*** (optional).
3. Click ***update*** or F8 to create the status.

End Task

TASK 7 : EDIT EXISTING STATUS

Start Here

To Edit existing Status click ***Sysem Administration*** (Alt+S)**,*System Settings (y)*** in main menu, ***Status Maintenance*** in left pane.



! The Status name should not contain symbols like '&'.

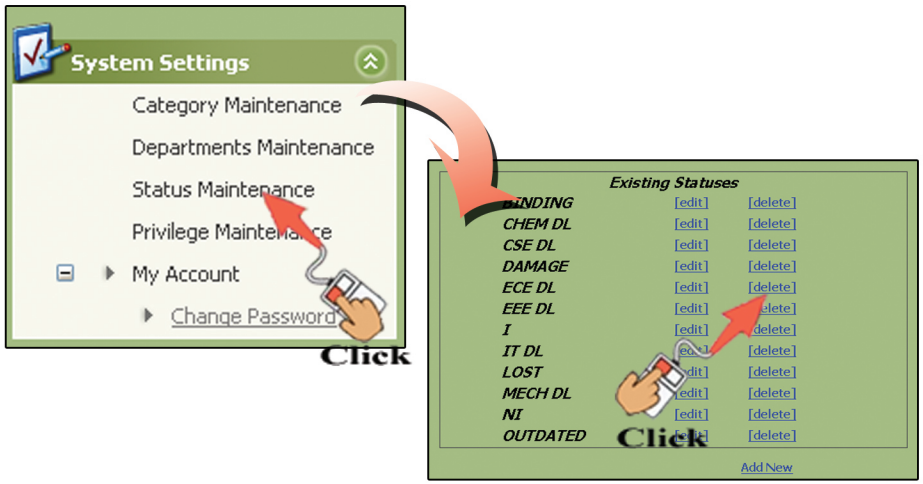
1. Click ***edit*** beside the status you want to edit.
2. Modify ***Status Name , and Description*** (optional).
3. Click ***update*** or F8 to modify the Status.

End Task

TASK 8 : DELETE STATUS

Start Here

To Delete Status click ***Sysem Administration*** (Alt+S)**,*System Settings (y)*** in main menu**,** ***Status Maintenance*** in left pane.



The status will be deleted only if no items exist under the status.

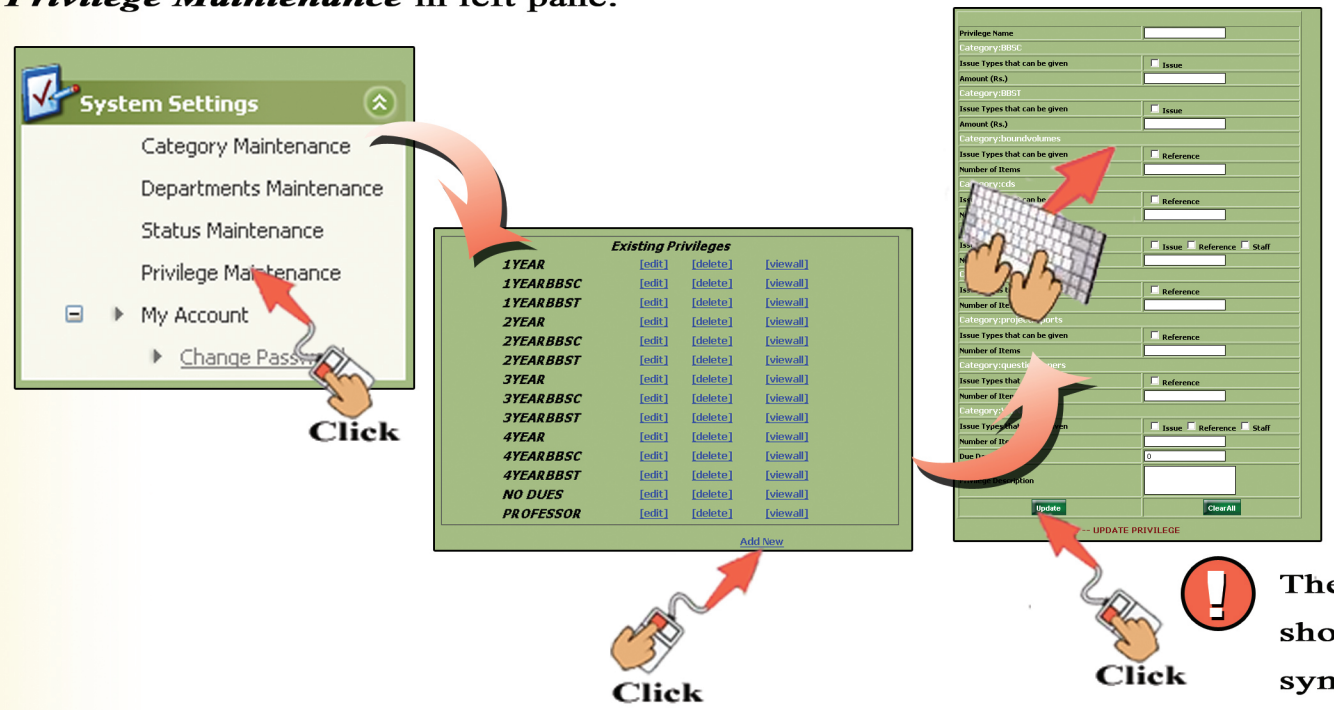
1. Click ***delete*** beside the Status you want to delete.
2. The Status will be deleted if no items exist under the Status.

End Task

TASK 9 : ADD NEW PRIVILEGE

Start Here

To Add New Privilege click ***Sysem Administration*** (Alt+S)***,System Settings (y)*** in main menu, ***Privilege Maintenance*** in left pane.



The Privilege name should not contain symbols like '&'. If number of due days is 0, then there will be no limit of number of days.

1. Click ***Add New.***

2. Enter ***Privilege Name, types available(issue, staff , reference) to the privilege, Number of Items or Amount*** to be given for each category, ***no.of due days , and Description*** (optional).

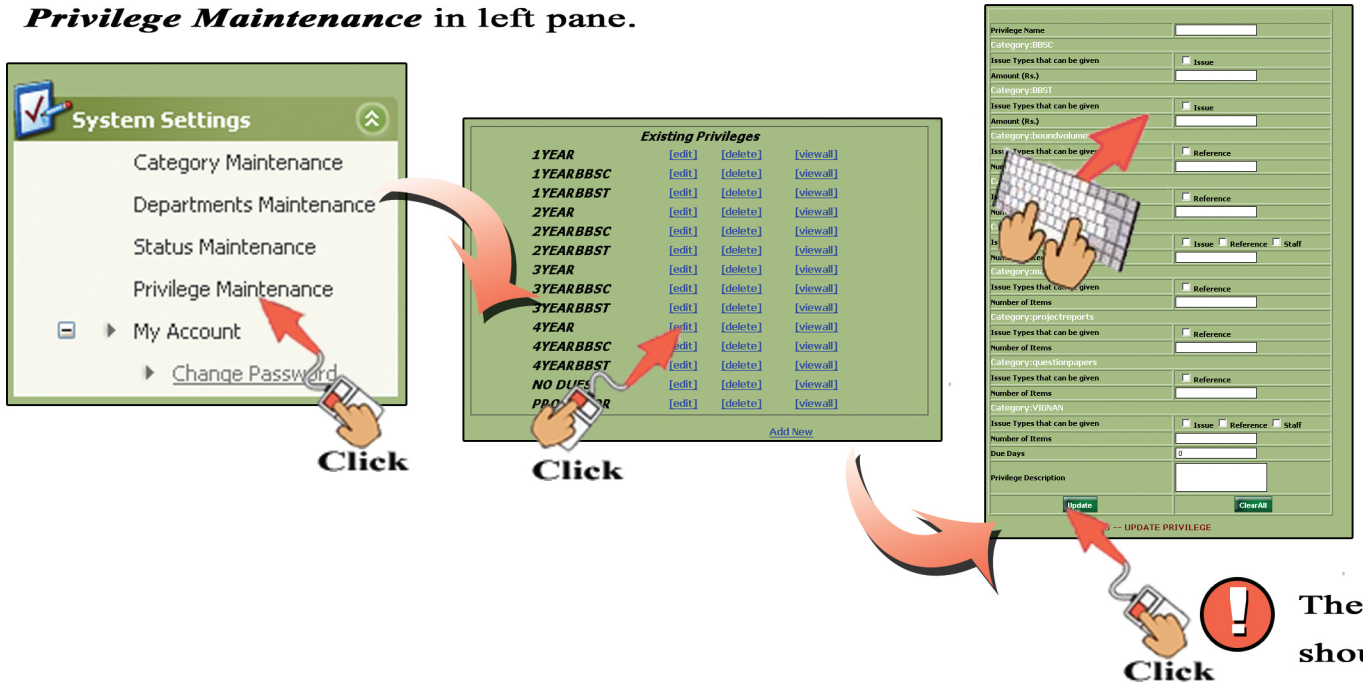
3. Click ***update*** or F8 to create the status.

End Task

Task 10 : Edit Existing Privilege

Start Here

To Edit existing Privilege click ***Sysem Administration*** (Alt+S)***,System Settings (y)*** in main menu, ***Privilege Maintenance*** in left pane.



The Privilege name should not contain symbols like '&'. If number of due days is 0, then there will be no limit of number of days.

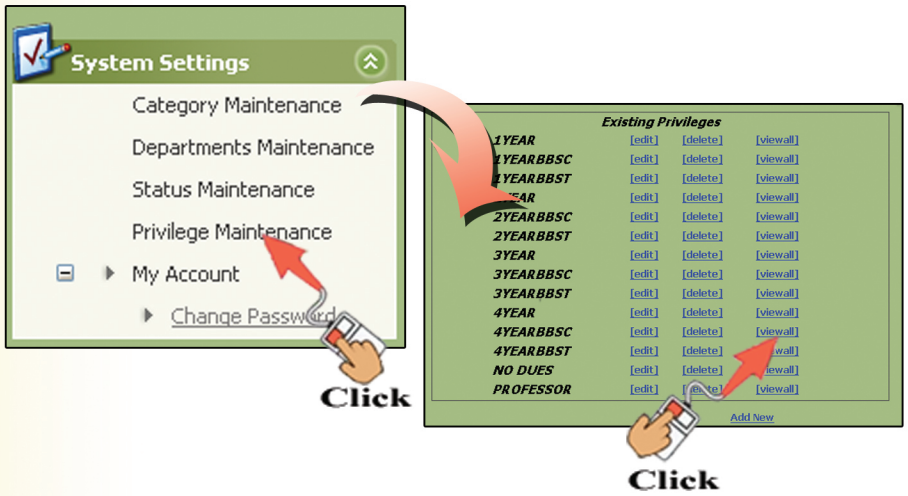
1. Click ***edit*** beside the Privilege you want to edit.
2. Modify required fields ***Privilege Name, types available(issue, staff , reference) to the privilege, Number of Items or Amount*** to be given for each category, ***no.of due days , and Description*** (optional).
3. Click ***update*** or F8 to modify the Privilege.

End Task

TASK 11 : DELETE PRIVILEGE

Start Here

To Delete a Privilege click ***Sysem Administration*** (Alt+S)**,*System Settings (y)*** in main menu, ***Privilege Maintenance*** in left pane.



The Privilege will be deleted only if no Account Holder exist under the Privilege.

1. Click ***delete*** beside the Privilege you want to delete.

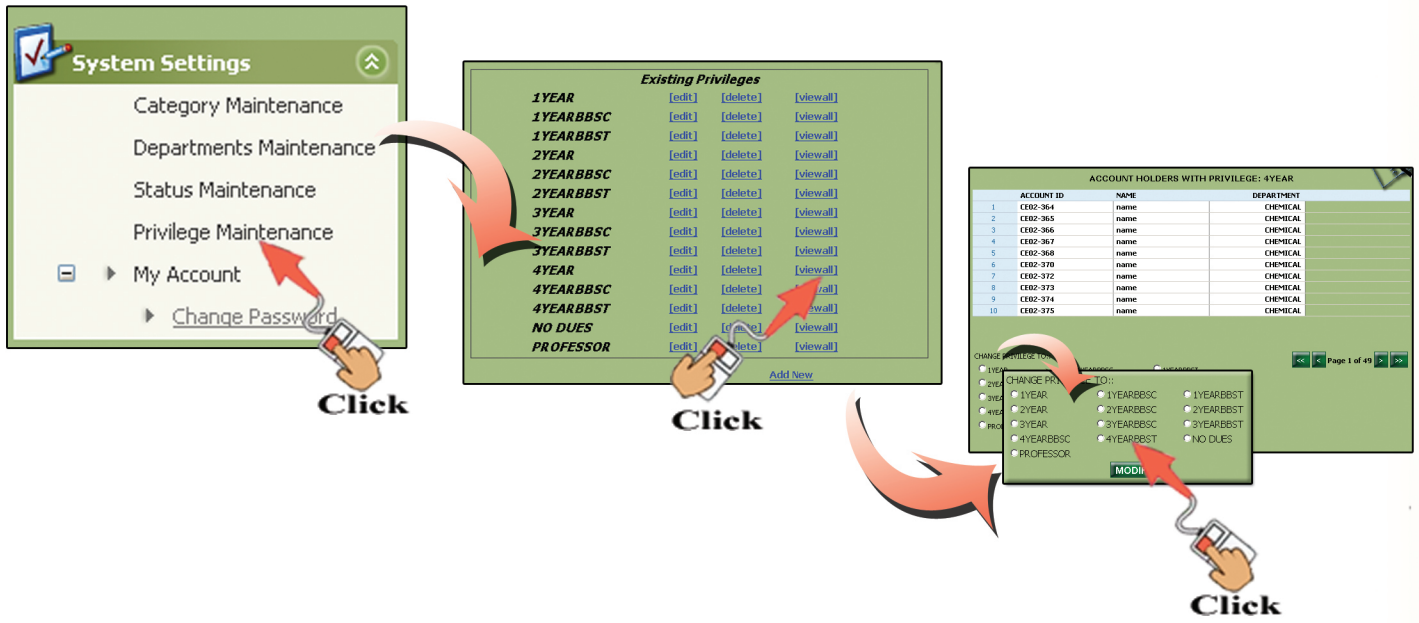
2. The Status will be deleted if no Account holders exist under the Privilege.

End Task

Task 12 : Modify Account Holders Privilege

Start Here

To modify account holders privilege in bulk click ***Sysem Administration*** (Alt+S), ***System Settings (y)*** in main menu, ***Privilege Maintenance*** in left pane.



1. Click ***view all*** beside the Privilege you want to change for account holders.
2. change to required privilege below.
3. Click ***modify*** to change the Privilege for the account holders.

End Task

PART 3

System Administration

ezLIB provides System Administration which is accessible only for the admin which is meant for total configuration of the system.

These include functions as below:

- Library Staff Maintenance
- Department Library Maintenance
- Binding Management
- Stock Verification
- Bill Maintenance
- Fine Maintenance
- No Due Certificate
- Barcode Generation
- Backup & Recovery
- View Vendor Details
- Clear History
- e-Mail Configuration

These tasks will be discussed in detail in this part.

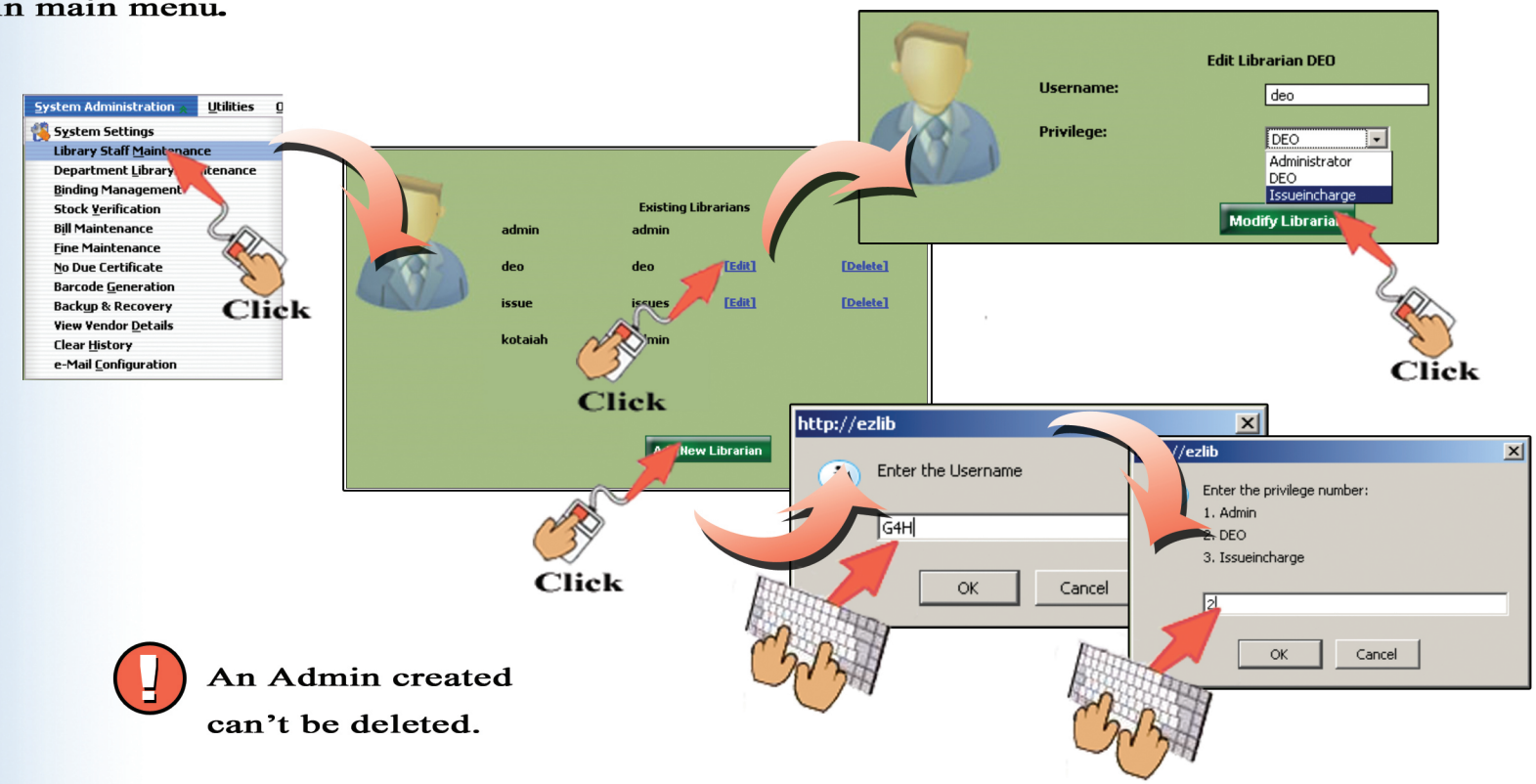
Tasks

Task#		Page#
1	Library Staff Maintenance	3.3
2	Department Library Maintenance	3.4
3	Binding Management	3.5
4	Stock Verification	3.6
5	Bill Maintenance	3.7
6	Fine Maintenance	3.8
7	No Due Certificate	3.9
8	Barcode Generation	3.10
9	Backup & Recovery	3.11
10	View Vendor Details	3.12
11	Clear History	3.13
12	e-Mail Configuration	3.14

TASK 1 : LIBRARY STAFF MAINTENANCE

Start Here

To Maintain Library Staff click ***Sysem Administration*** (Alt+S)***,Librray Staff Maintenance(m)*** in main menu.



! An Admin created can't be deleted.

1. To add new staff click ***Add New Librarian, Enter username ,Enter Privilege number*** .

2. To edit existing staff click ***edit*** beside the library staff name, then modify ***Username*** and ***Privilege*** and click ***Modify Librarian.***

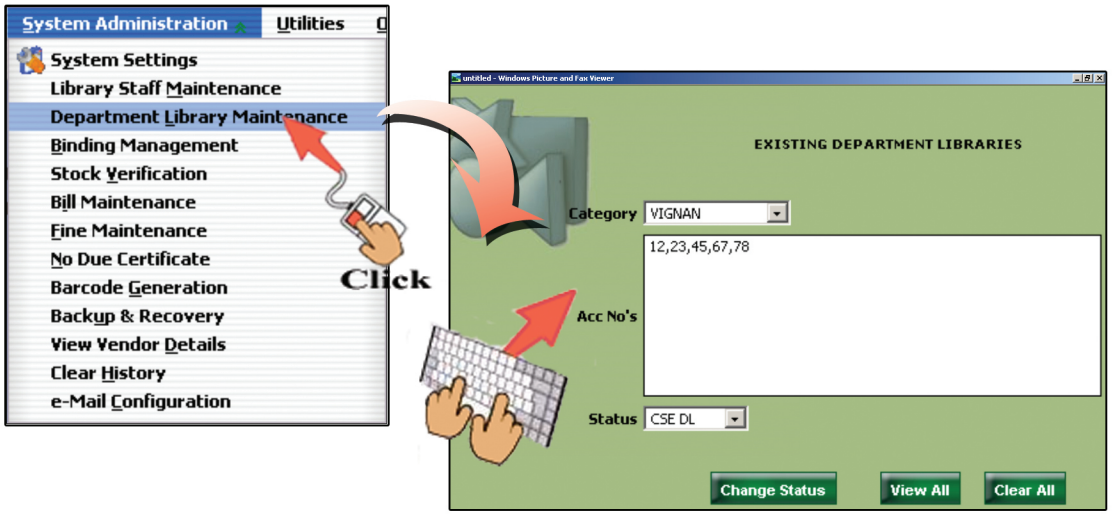
3. To delete existing staff click ***delete*** beside the library staff name.

End Task

Task 2 : Department Library Maintenance

Start Here

To Maintain Department Libraries click ***Sysem Administration*** (Alt+S), ***Department Library Maintenance(l)*** in main menu.



1. To add new items to a department select the ***Category,*** enter ***accession numbers seperated by commas*** and select ***status*** and click ***change status.***

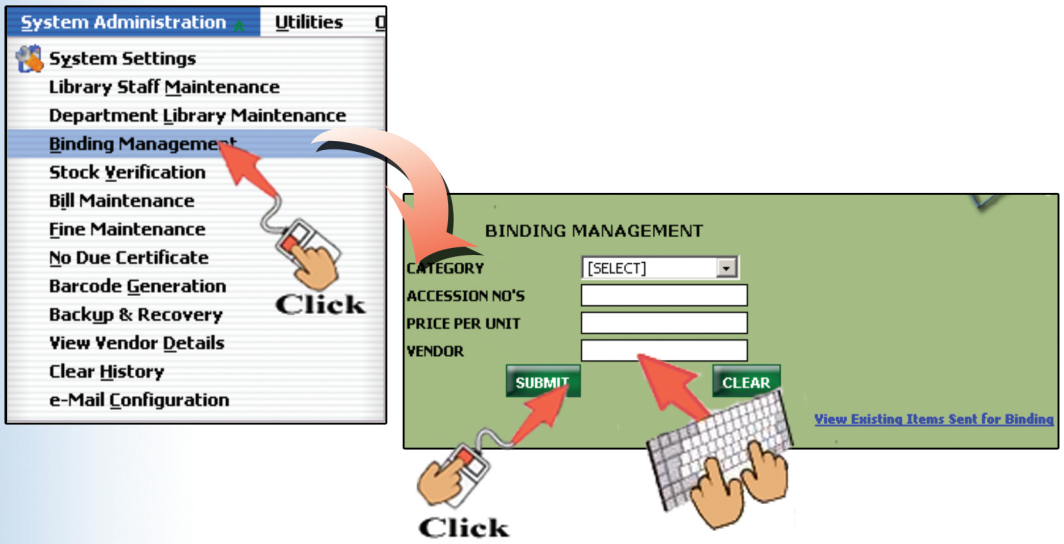
2. To view all items in a department select ***Category*** and ***Status*** and then click ***View All***.

End Task

TASK 3 : BINDING MANAGEMENT

Start Here

To goto Binding Management click ***Sysem Administration*** (Alt+S)***,Binding Management(b)*** in main menu.



1. To add books sent for binding select ***Category***, ***Accession numbers (Maximum 10 at a time)***, ***price per unit*** and ***vendor*** then click ***Submit.***

2. To view all books sent for binding click ***view existing items sent for binding.***

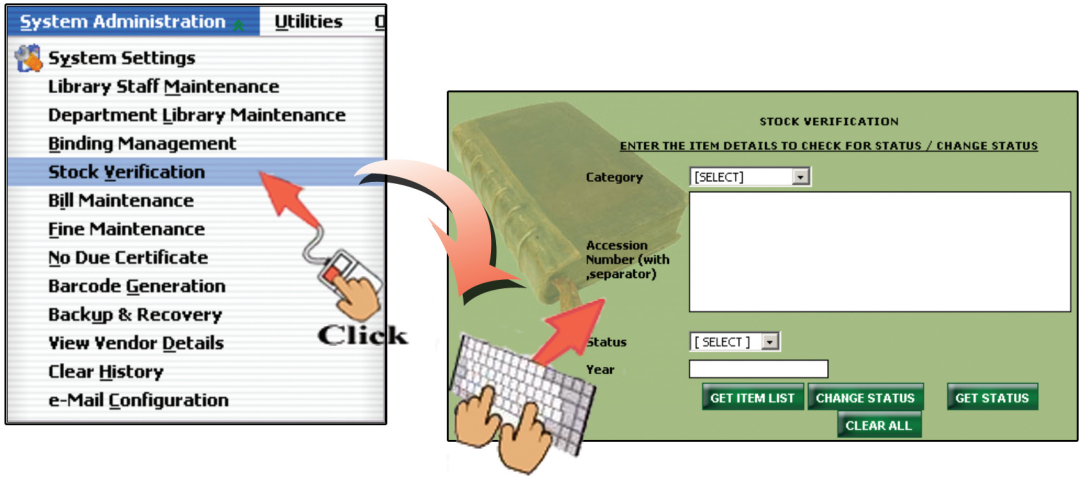
3. To receive all books sent for binding click ***view existing items sent for binding*** then the list is shown by date, click on ***All Items Recieved*** for the required list.

End Task

Task 4 : Stock Verification

Start Here

To verify library stock lists click ***Sysem Administration*** (Alt+S), ***Stock Verification(v)*** in main menu.



1. To add new items to Lost Items List select the ***Category,*** enter ***accession numbers seperated by commas*** and select ***status*** and enter ***year*** click ***change status.***

2. To get status of items select the ***Category,*** enter ***accession numbers seperated by commas*** click ***get status.***

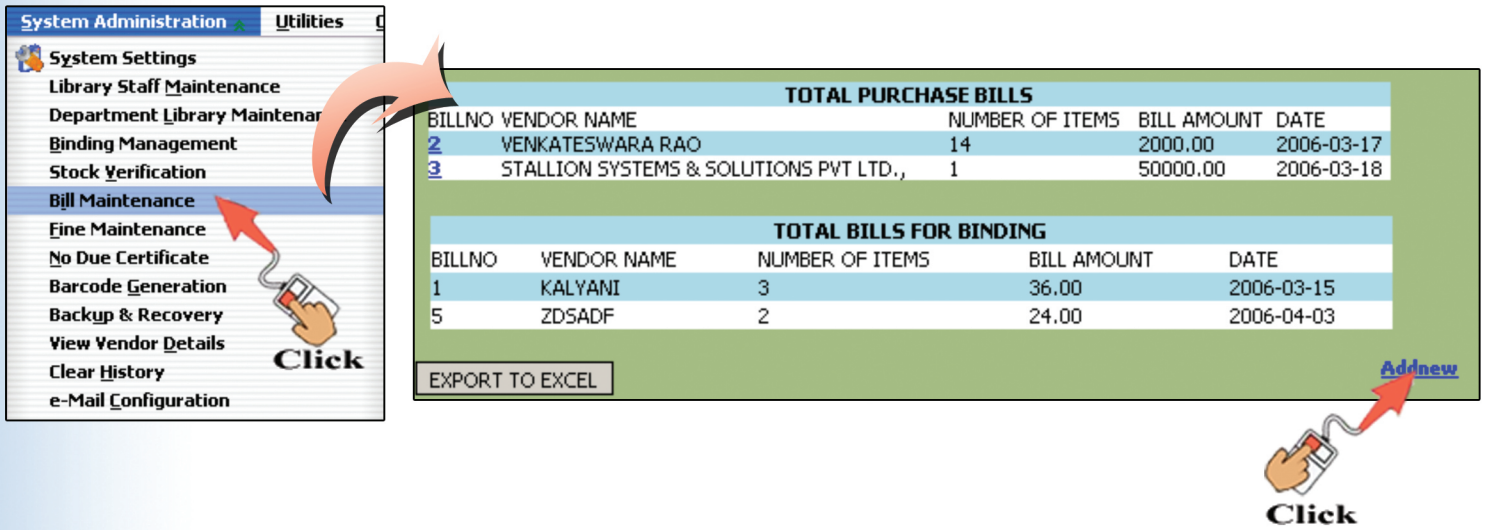
3. Select ***category*** and click ***Get Item List*** to get the list of items that are lost in the library.

End Task

TASK 5 : BILL MAINTENANCE

Start Here

To Maintain Bills click ***Sysem Administration*** (Alt+S)***,Bill Maintenance(i)*** in main menu.



1. To add bills click ***Add new*** then enter the deatils and add the bill.

2. The Binding bills will be automatically added to the bills.
   To modify the purchase bills click the ***billno***.

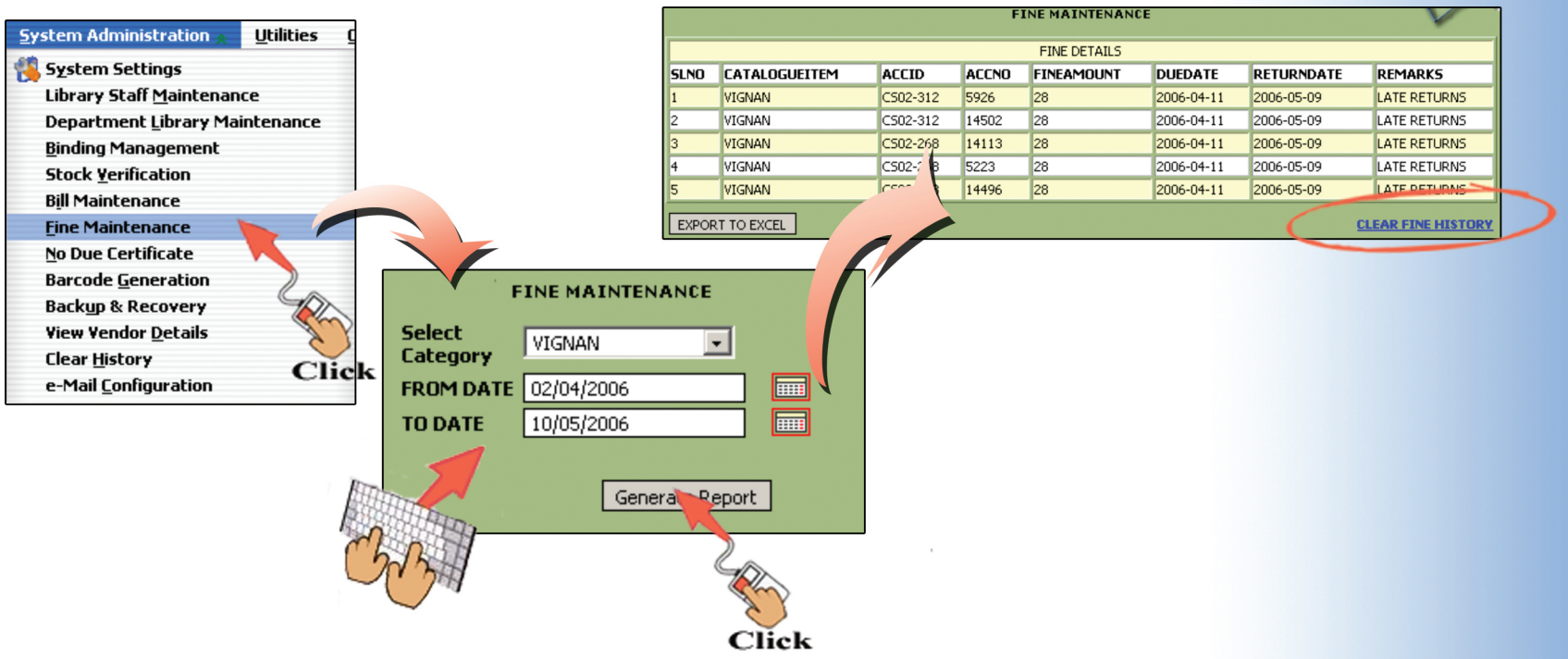
3. The total bills can be exported to excel by clicking ***EXPORT TO EXCEL*** which will be dealt in detail in ***PART9***.

End Task

TASK 6 : FINE MAINTENANCE

Start Here

To Maintain Fines click ***Sysem Administration*** (Alt+S), ***Fine Maintenance(f)*** in main menu.



1. To view fine list select the ***Category,*** enter ***FROM DATE , TO DATE then click Generate Report*** to view the fines report in between the given dates.
2. The Collected fines can be cleared by clicking the link ***CLEAR FINE HISTORY*** shown in the selectiion.
3. The total fine list can be exported to excel by clicking ***EXPORT TO EXCEL*** which will be dealt in detail in ***PART9.***

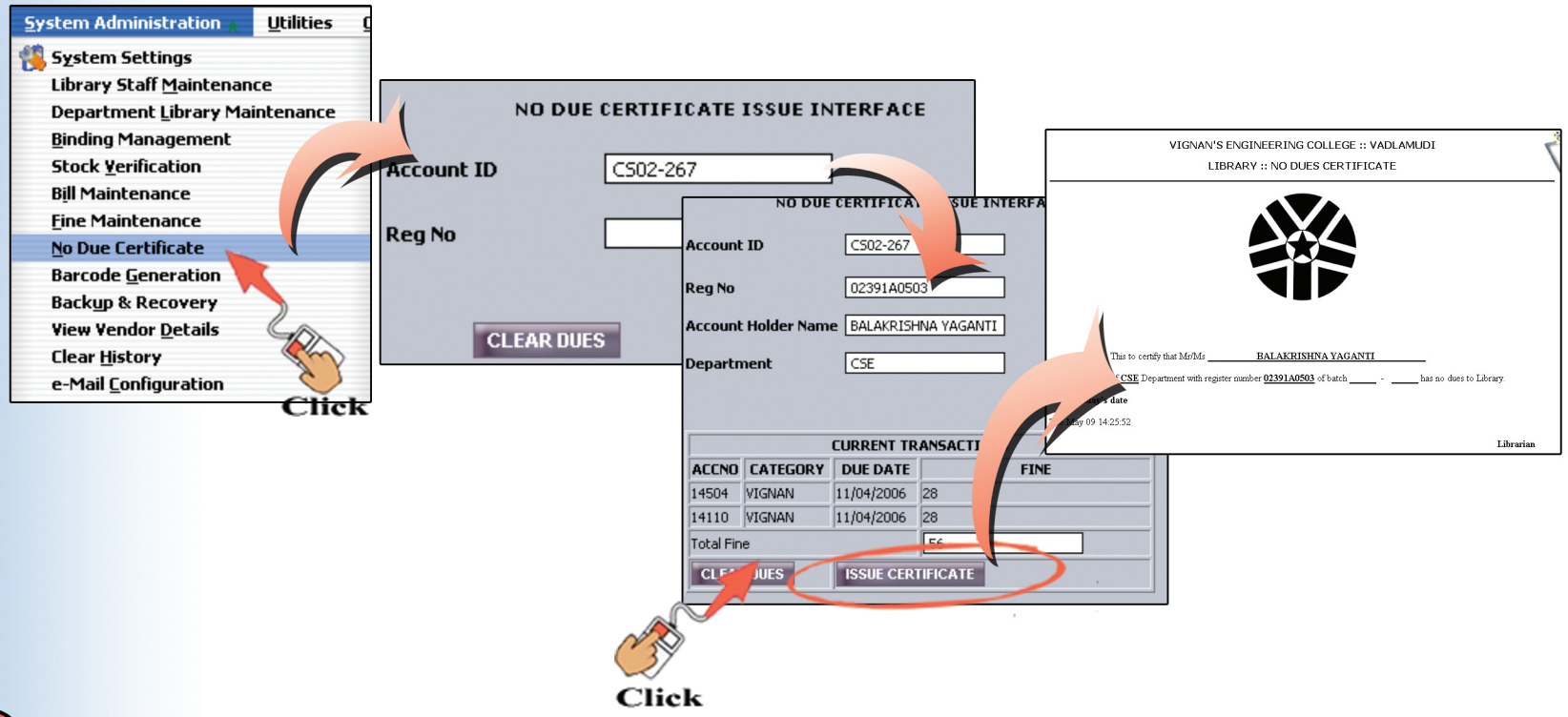
End Task

TASK 7 : NODUE CERTIFICATE

Start Here

To Generate a No due Certificate for account holder click ***Sysem Administration*** (Alt+S), ***No Due Certificate(N)***.

in main menu.



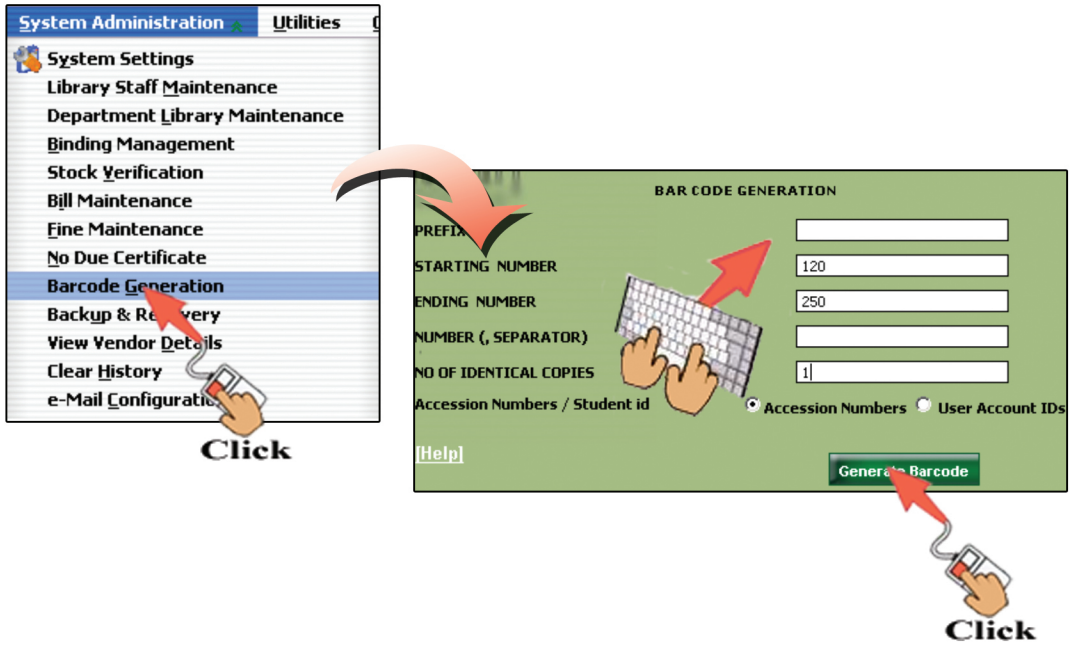
1. To issue a no due certificate enter the ***Account Id*** or ***Reg. No,*** then the details of the account are displayed.
2. If the account contains any items to be returned then certificate can't be issued, so click ***CLEAR DUES***.
3. If the account contains no items to be returned the click ***ISSUE CERTIFICATE*** (shown in selection) to generate the certificate.

End Task

Task 8 : Barcode Generation

Start Here

To generate barcode click ***Sysem Administration*** (Alt+S), ***Barcode Generation(g)*** in main menu.



Using even number of barcodes to be printed saves the barcode lables.

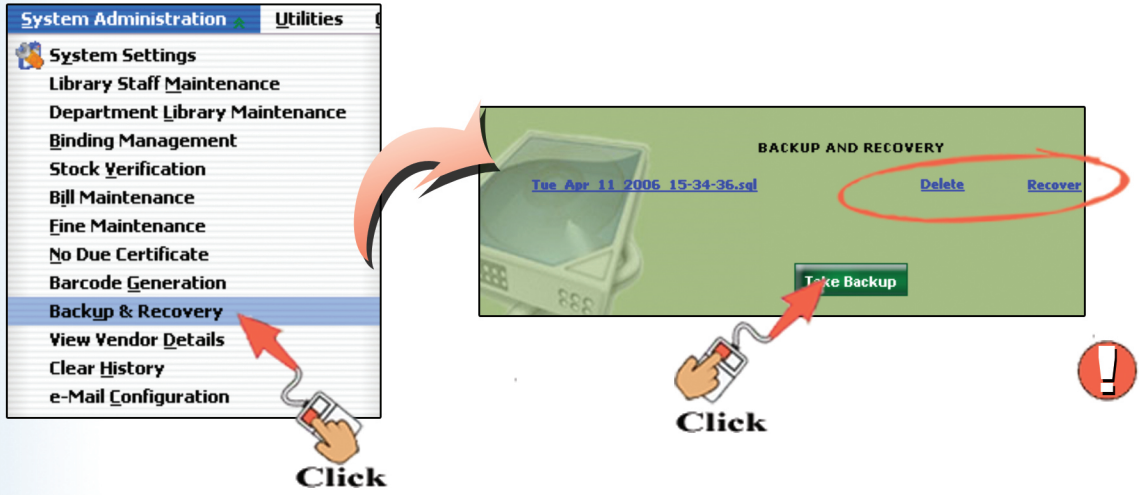
1. To generate barcode enter the ***PREFIX*** (optional), ***STARTING NUMBER, ENDING NUMBER, NUMBERS*** (only if start and end numbers not given), ***NUMBER OF IDENTICAL COPIES*** and select whether ***Accesion numbers*** or ***User Account IDs*** and click ***Generate Barcode.***

End Task

TASK 9 : BACKUP & RECOVERY

Start Here

To take backup or recover the data to a previous point of time click ***Sysem Administration*** (Alt+S), ***Backup & Recovery(u).*** in main menu.



Once the Data is recovered can't be rolled back. So be cautious while recovering the database.

It is a good practice to take regular backups to avoid data loss during system crash.

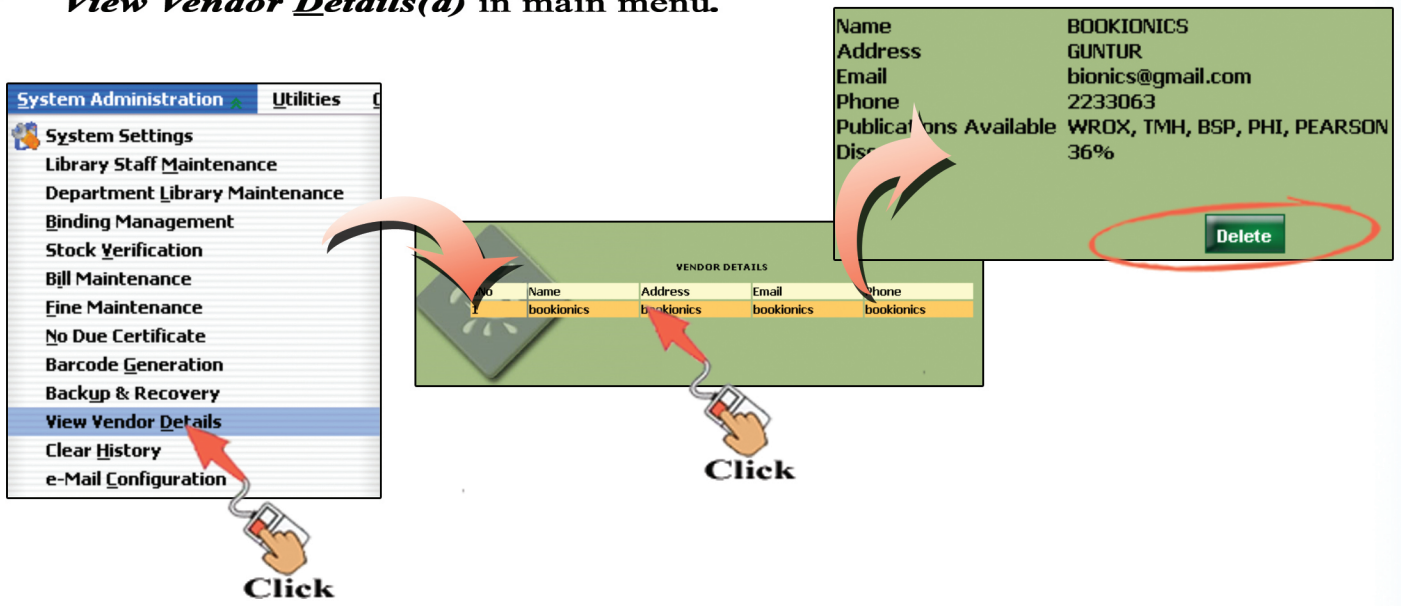
1. To take backup click ***Take Backup*** Button.
2. To Delete a backup click the ***delete*** link beside the backup name.
3. To restore the previous data click ***restore*** link beside the backup name.

End Task

Task 10 : View Vendor Details

Start Here

To view details of vendors who visit library, click ***Sysem Administration*** (Alt+S), ***View Vendor Details(d)*** in main menu.



1

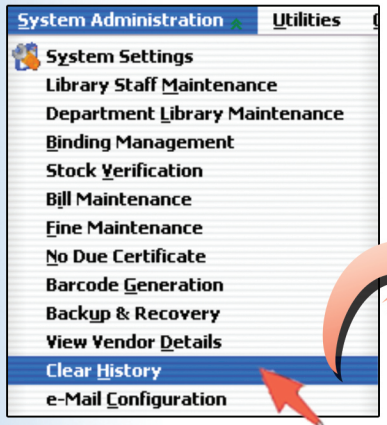
To view vendor details who visit the library, click on the vendor from those shown in the table. To delete the details click ***Delete*** button (Shown in the selection)

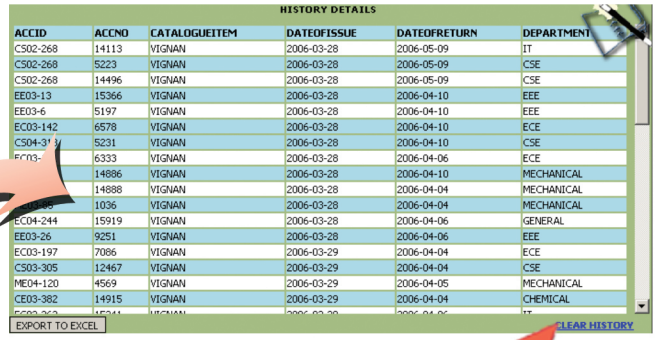
End Task

TASK 11 : CLEAR HISTORY

Start Here

To clear transaction history click ***Sysem Administration*** (Alt+S), ***Clear History(h)***. in main menu.





Click

Click

Once the the transactions are cleared they can't be rolled back.

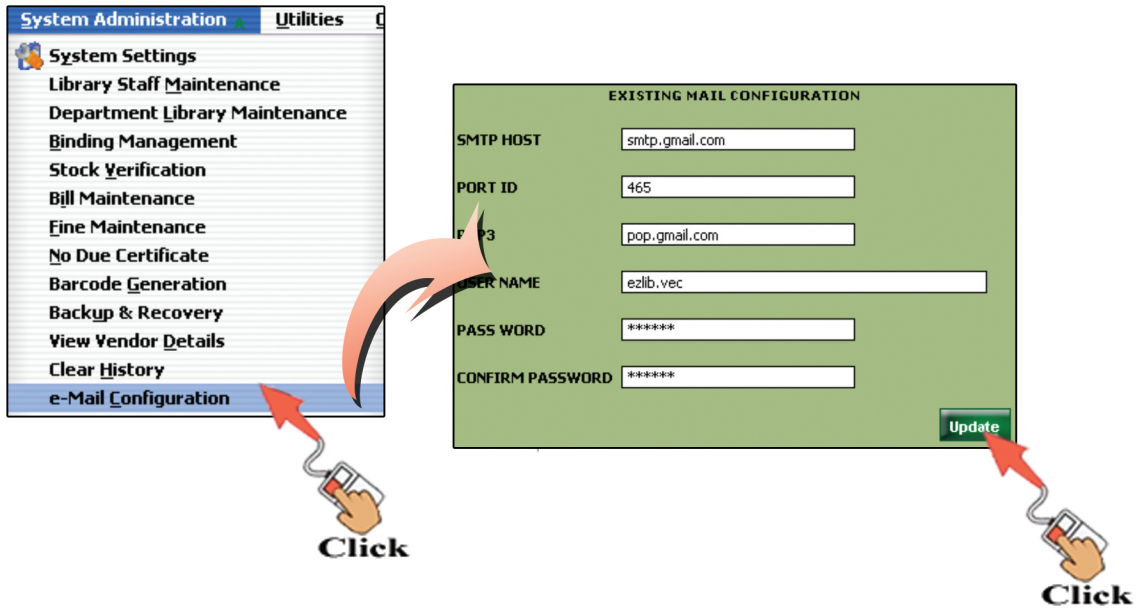
1 To Clear transactions history click link ***CLEAR HISTORY*** shown below the transactions list.

End Task

Task 12 : e-Mail Configuration

Start Here

To send e-mails to vendors or to account holders in case of late returns first e-Mail Configuration must be done for this click ***Sysem Administration*** (Alt+S), ***e-Mail Configuration(c)*** in main menu.



1 To Configure email enter ***SMTP HOST, PORT ID, USER NAME, PASSWORD*** and click ***Update***.

End Task

PART 4

CATALOGUING

ezLIB provides Catalouging feature that is meant to add or modify items to the library catalogue. The items are added to each of the Category created in Category Maintenance of System Setting explained earlier in PART1. The services provided in catalouging feature are discussed in this part.

The services are classified into

Stock Maintenance
Subscribe
Journal Attendance
Bound Volume Maintenance &
Change Status

The above services are divided into tasks and explained in this part.

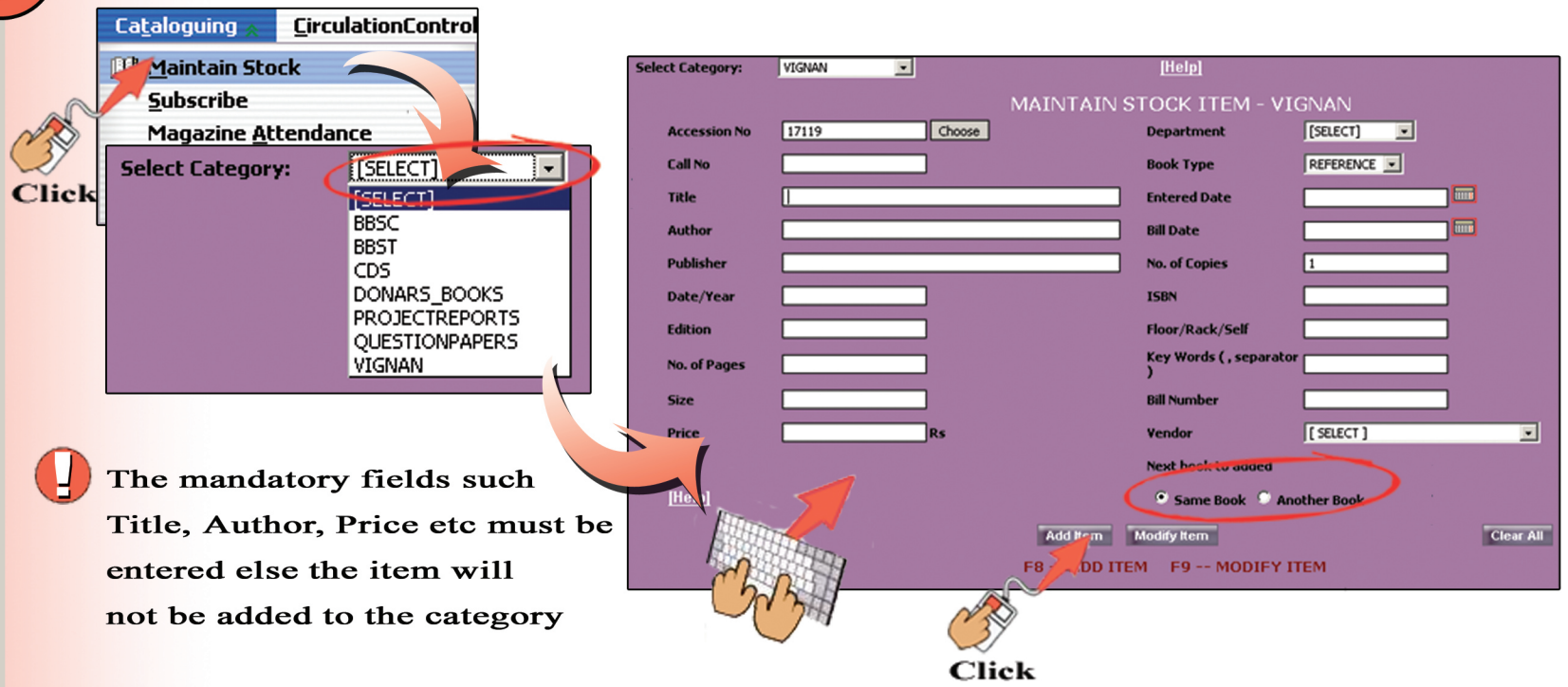
Tasks

Task#		Page#
1	Add Items to Stock	4.3
2	Choose & Add Books	4.4
3	Modify Stock Items	4.5
4	Subscribe New Journal	4.6
5	Edit Subscribed Journals	4.7
6	Renew Subscribed Journal	4.8
7	Future Renewals	4.9
8	Journal Attendance	4.10
9	Add Item to Bound Volumes	4.12
10	Edit Bound Volume Items	4.13
11	Change Status	4.14

TASK 1 : ADD ITEMS TO STOCK

Start Here

To Add Items to stock click Ca*taloguing* (Alt+T)*, Maintain Stock(M)* in main menu.



The mandatory fields such Title, Author, Price etc must be entered else the item will not be added to the category

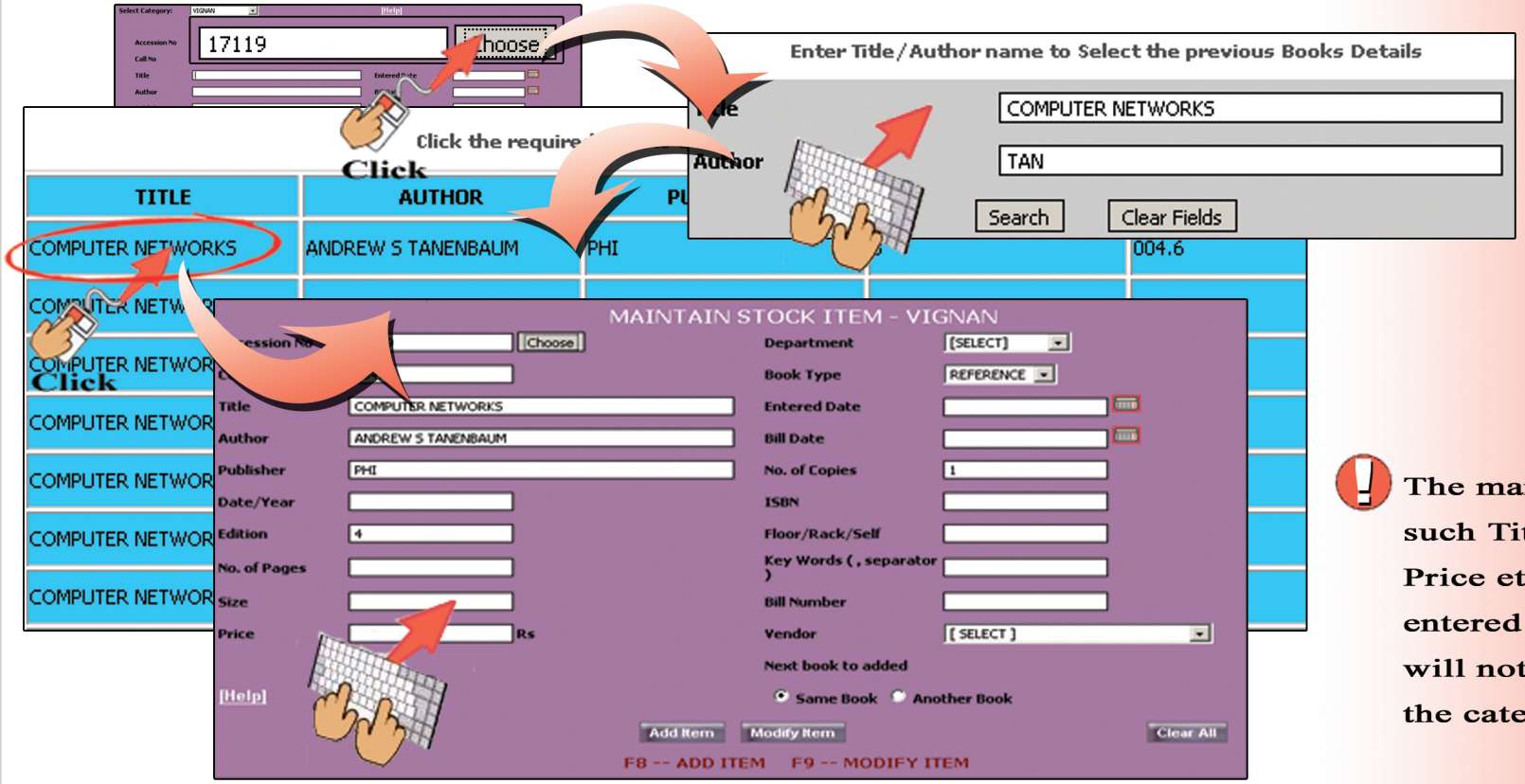
1. To Add Item, first ***Select Categury (shown in selection)*** then the corresponding fields wiil be displayed below the selection
2. Enter the required fields and then select whether next Item is the ***Same Item*** or ***Another Item.***
3. Click ***Add Item*** button or press ***F8*** to Add item to the selected category.

End Task

Task 2: Choose & Add Books

Start Here

To Choose and Add Books to stock click Ca***taloguing*** (Alt+T***), Maintain Stock(M)*** in main menu.



The mandatory fields such Title, Author, Price etc must be entered else the item will not be added to the category

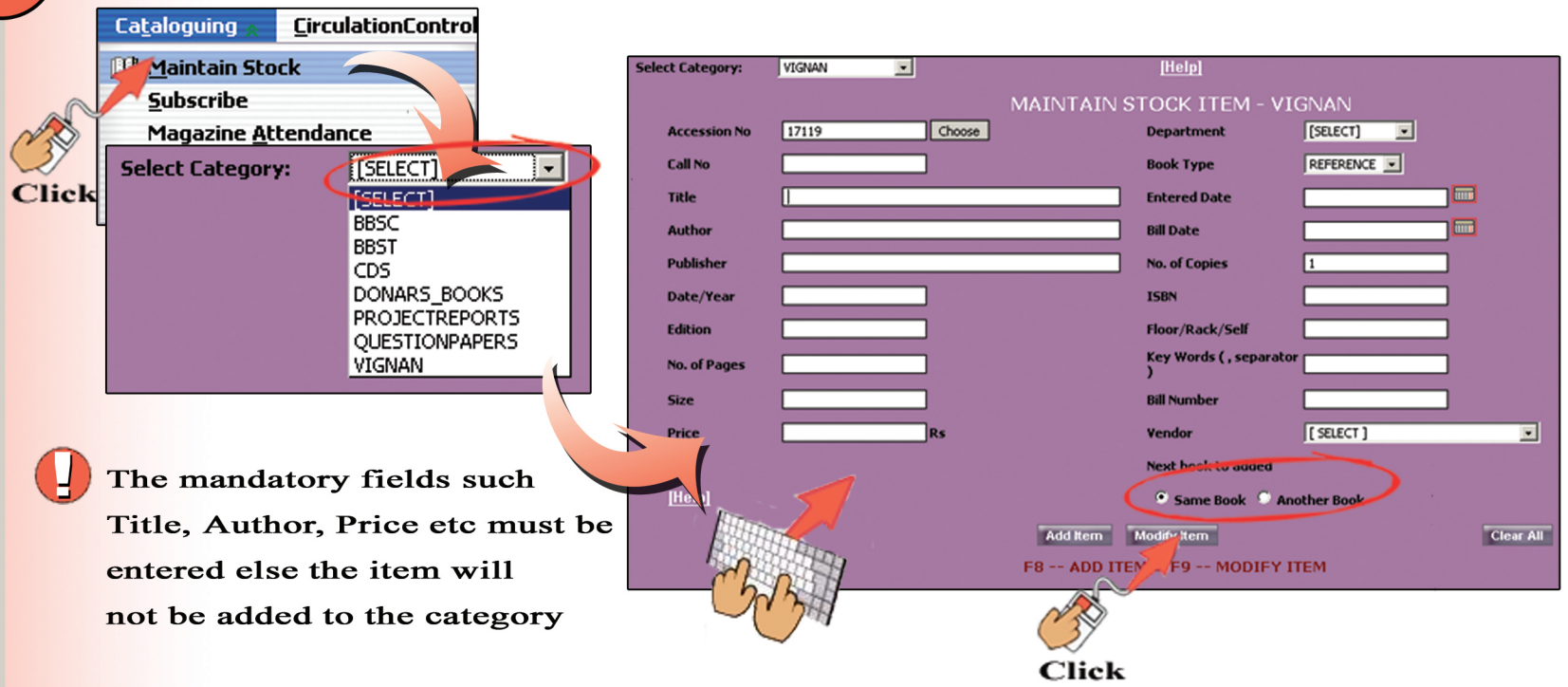
1. To Add Item, first ***Select Categury (related to books)*** then the corresponding fields wiil be displayed below the selection along with a ***choose*** button beside accession number.
2. Click ***Choose*** another page will be displayed enter ***Title*** or ***Author*** or both and click ***Search.*** Results will be displayed below in that click the required title (shown in the selection).
3. The details of the selected title are displayed in the first page, enter the remaining details and click ***Add Item*** or Press ***F8*** to add the book to the category.

End Task

TASK 3 : MODIFY STOCK ITEMS

Start Here

To modify stock items click Ca*taloguing* (Alt+T), ***Maintain Stock(M)*** in main menu.



The mandatory fields such Title, Author, Price etc must be entered else the item will not be added to the category

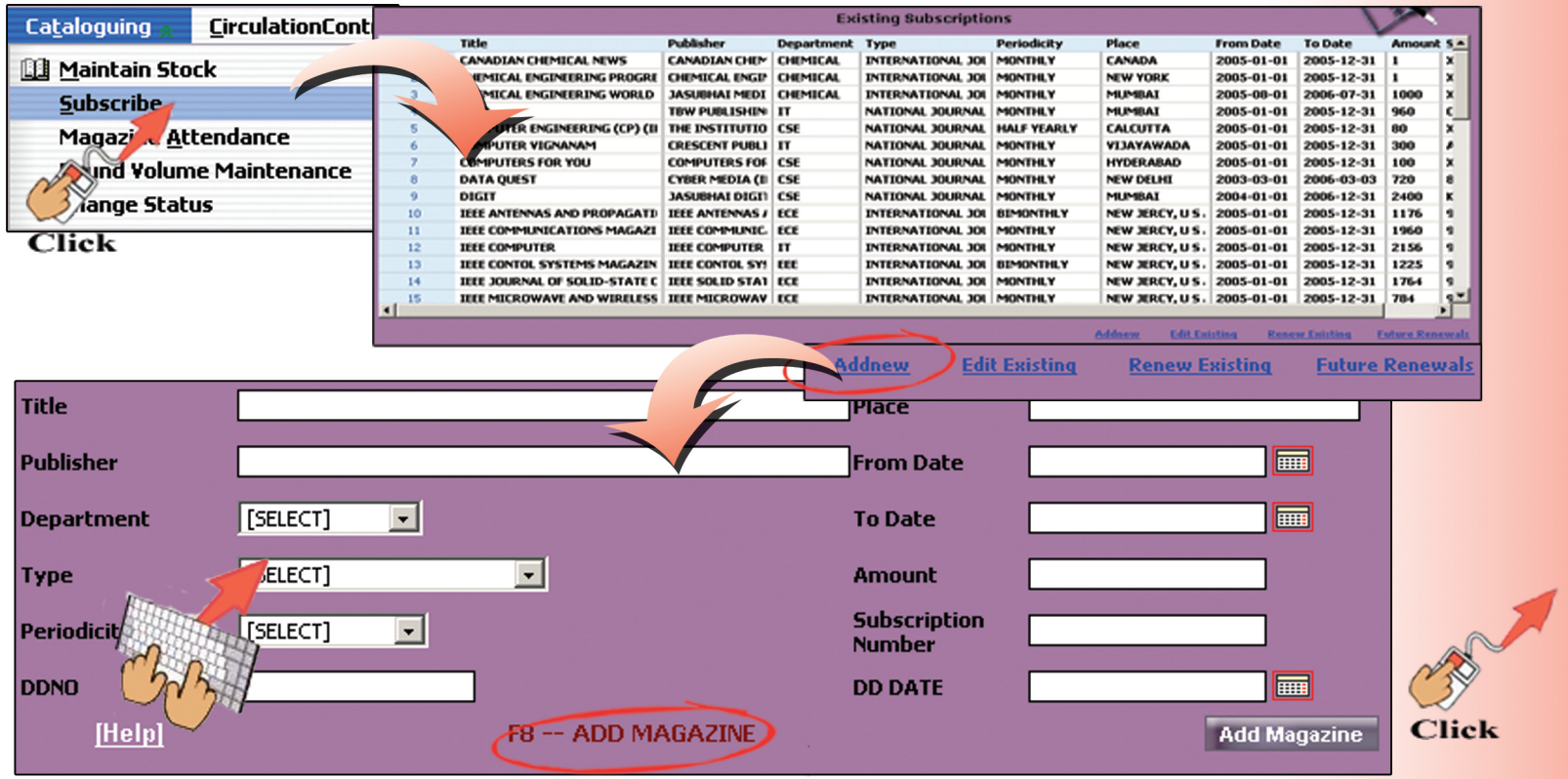
1. To modify Item, first ***Select Categury (shown in selection)*** then the corresponding fields wiil be displayed below the selection, Enter the ***Accession Number*** and press tab or enter.
2. Modify the required fields and then select whether next Item is the ***Same Item*** or ***Another Item.***
3. Click ***Modify Item*** button or press ***F9*** to Modify item in the selected category.

End Task

Task 4: Subscribe New Journal

Start Here

To subscribe new journals click Ca*taloguing* (Alt+T), ***Subscribe (S)*** in main menu.



1. To Subscribe new Journal click ***Add new(Shown in selection)***.

2. Enter the details of the journal such as ***Title, Publisher, Department etc*** in the fields given.

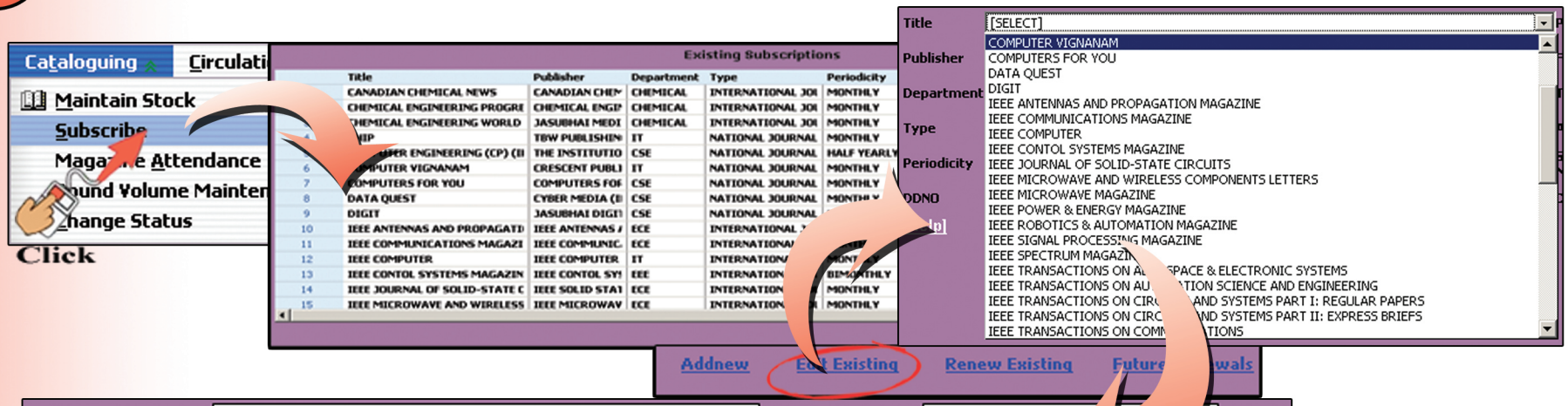
3. Now click ***Add Magazine*** or Press ***F8*** to subscribe the Journal.

End Task

Task 5: Edit Subscribed Journals

Start Here

To edit subscribed journals click Ca*taloguing* (Alt+T), ***Subscribe (S)*** in main menu.



1. To edit subscribed Journal click ***Edit Existing (Shown in selection)***.

2. Select the ***Title*** of the journal whose details need to be modified. Then the existing details will be displayed, modify the details.

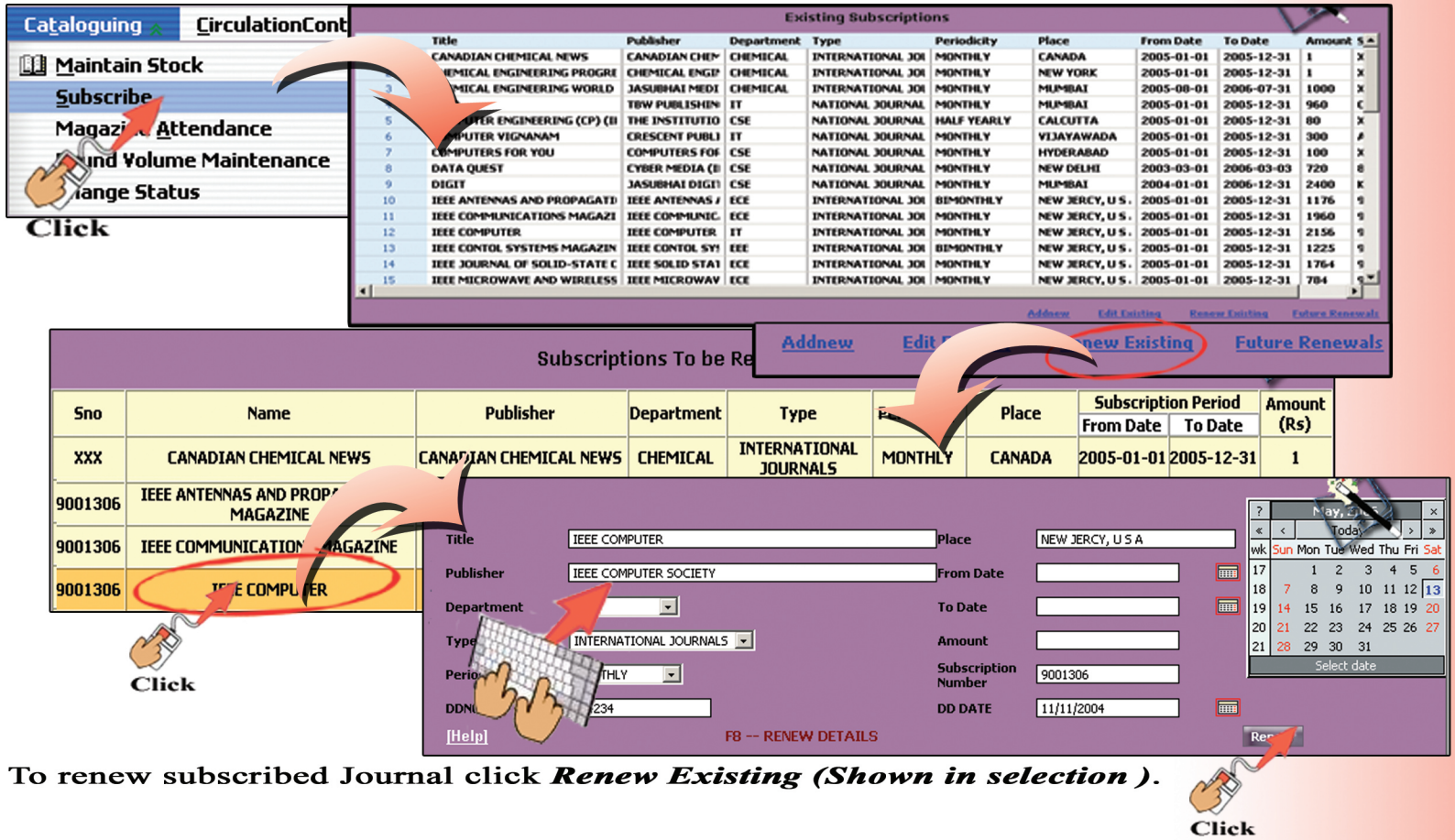
3. Now click ***Edit Magazine*** or Press ***F8*** to edit subscribed Journal.

End Task

Task 6: Renew Subscribed Journal

Start Here

To renew subscribed journals click Cataloguing (Alt+T), Subscribe (S) in main menu.



1. To renew subscribed Journal click ***Renew Existing (Shown in selection)***.

2. Select the ***Title*** of the journal whose subscription need to be renewed. Then the existing details will be displayed, enter the ***From Date, To Date*** and ***Amount***.

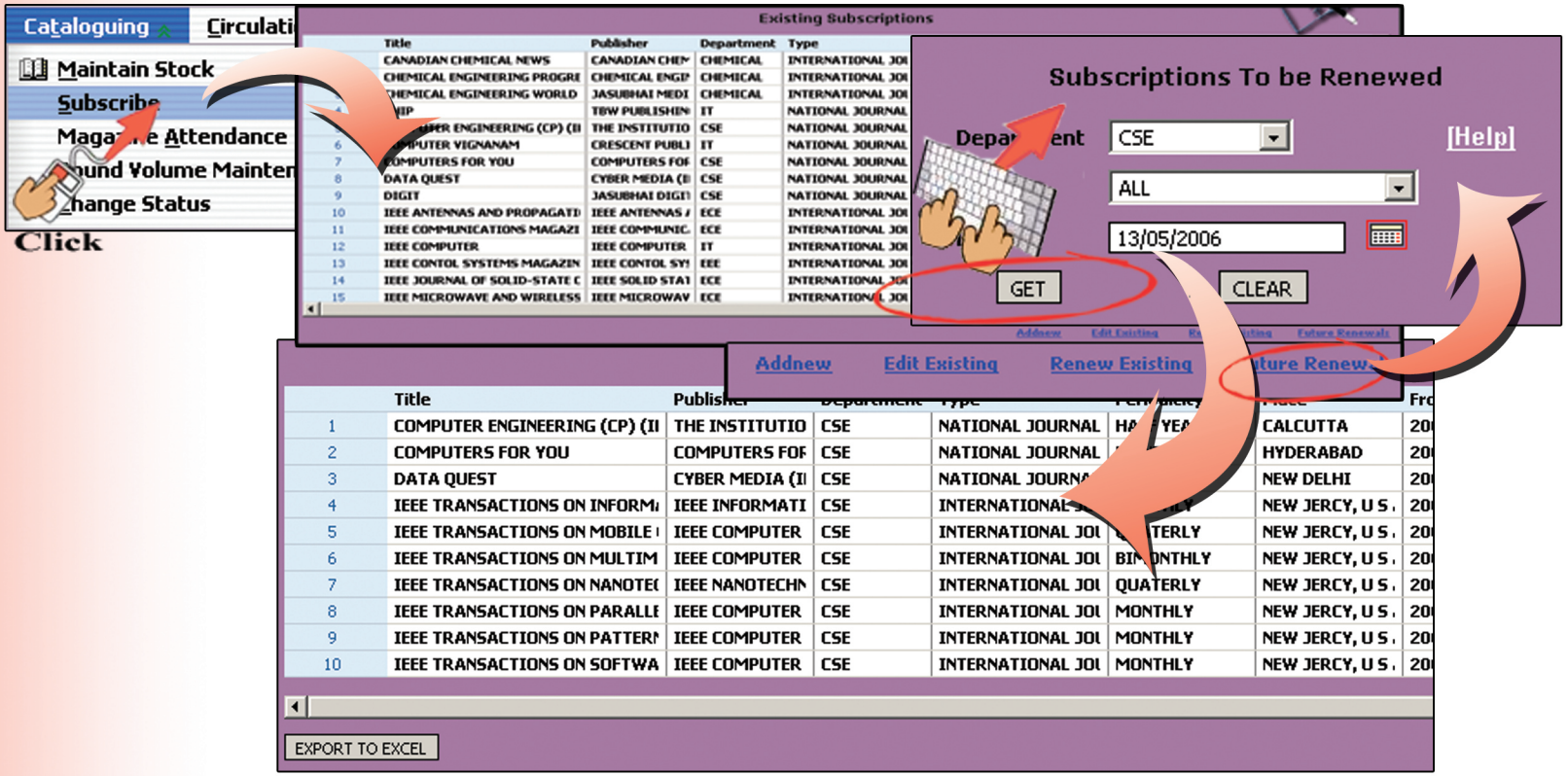
3. Now click ***Renew*** or Press ***F8*** to renew the subscribed the Journal.

End Task

Task 7: Future Renewals

Start Here

To view future renewals of subscribed journals click Ca*taloguing* (Alt+T), ***Subscribe (S)*** in main menu.



1. To view future renewals of subscribed Journal click ***Future Renewals (Shown in selection)***.

2. Select the ***Department, Type and Date*** of the journal.

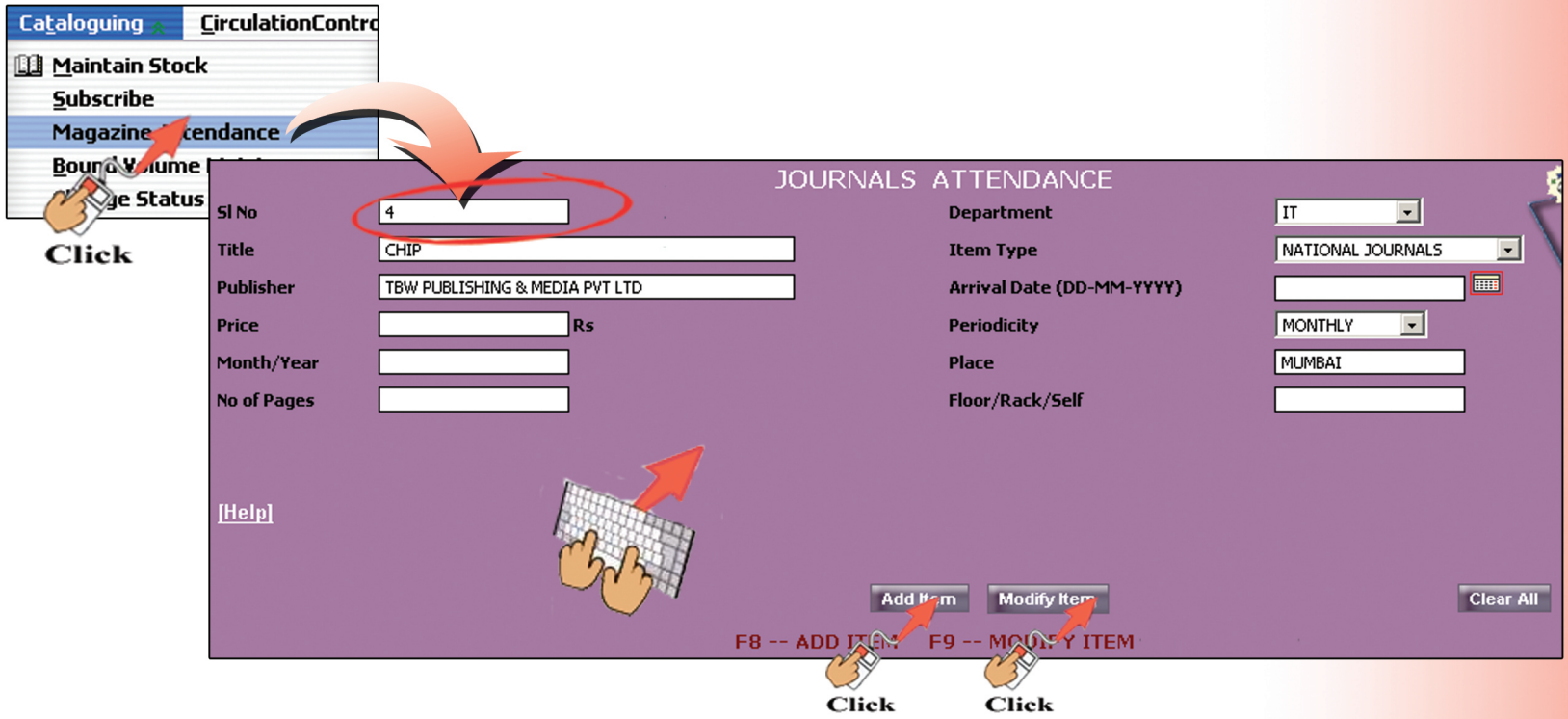
3. Now click ***Get*** to get the future renewals.

End Task

Task 8: Journal Attendance

Start Here

To maintain the attendance for subscribed journals click Ca*taloguing* (Alt+T), *Magazine Attendance (A)* in main menu.

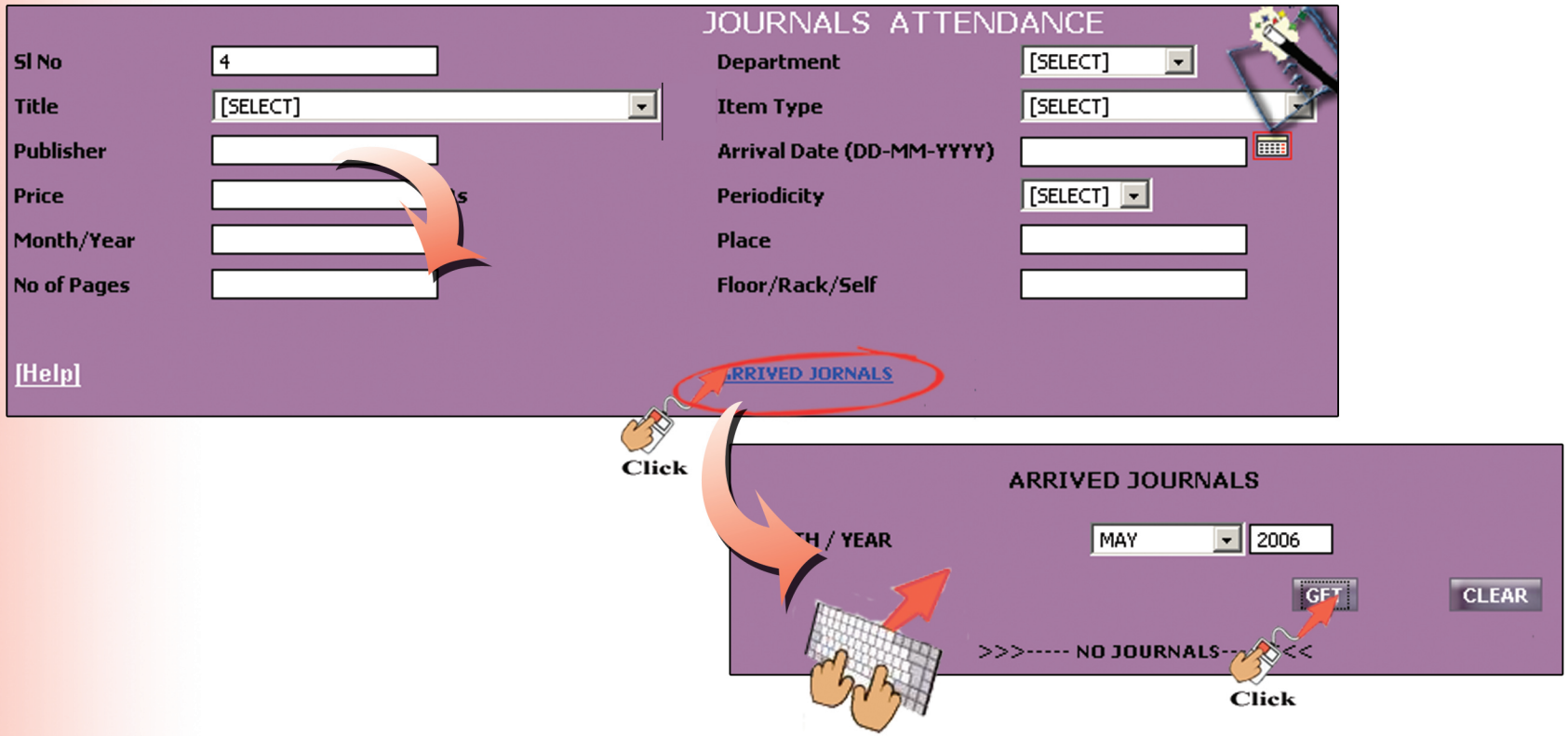


1. A Journal is added every time it is recieved, for this select the ***Title*** and enter the ***Price, Month/Year, Noof Pages, Arrival Date and Floor/Rack/Shelf*** click ***Add Item*** or press ***F8.***

2. To modify a journal added enter ***Sl No*** and press tab , now modify the required details and click ***Modify Item*** or press ***F9***.

3. By adding the journal the attendance for that month is taken.

Next Step



4. To View the arrived journals click on ***Arrived Journals***.

5. Select the ***month*** and enter the ***year.***

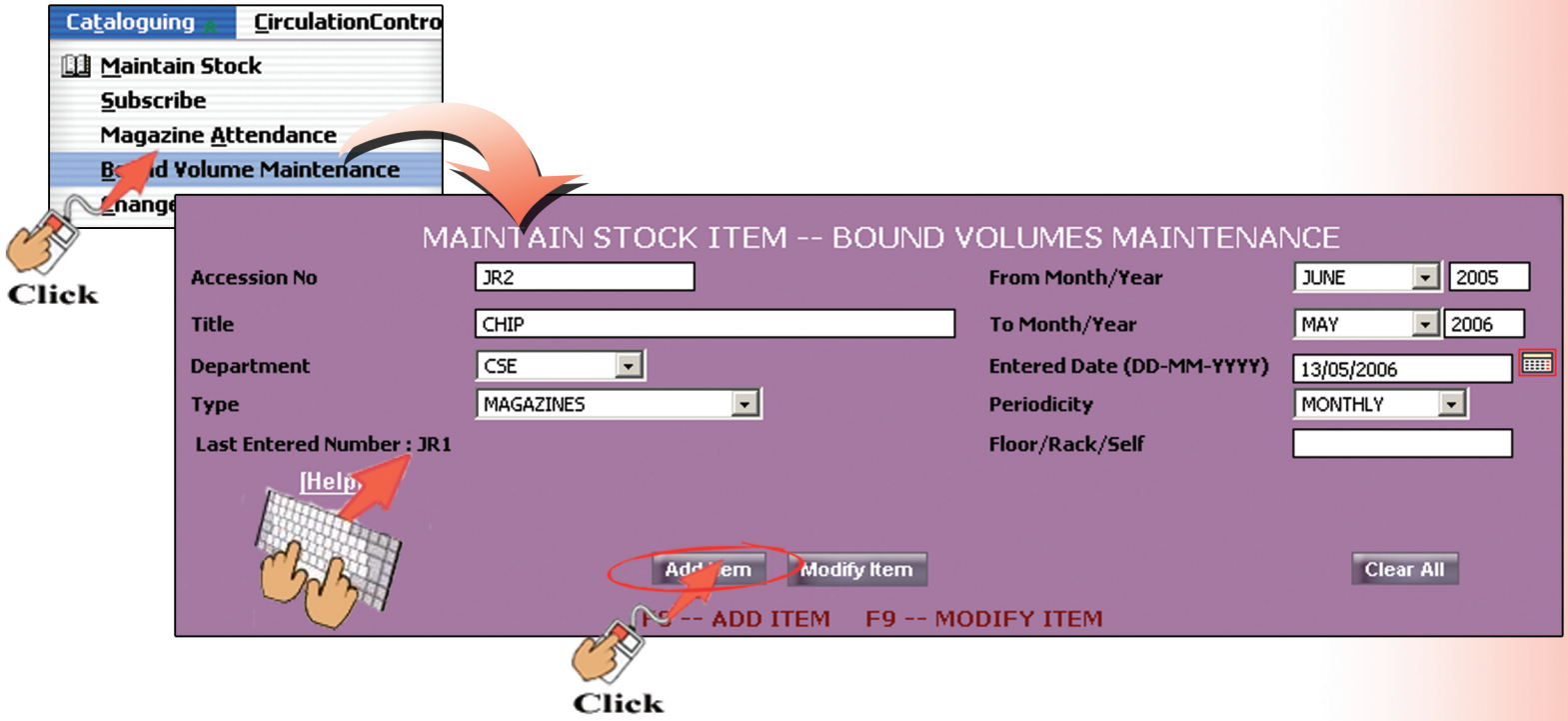
6. Click ***Get*** button to view the list of aarived journals.

End Task

Task 9: Add Item to Bound Volumes

Start Here

To sdd bound volumes click Ca*taloguing* (Alt+T), ***Bound Volume Maintenance (B)*** in main menu.



1. To Add a New Bound Volume Enter the required fields.

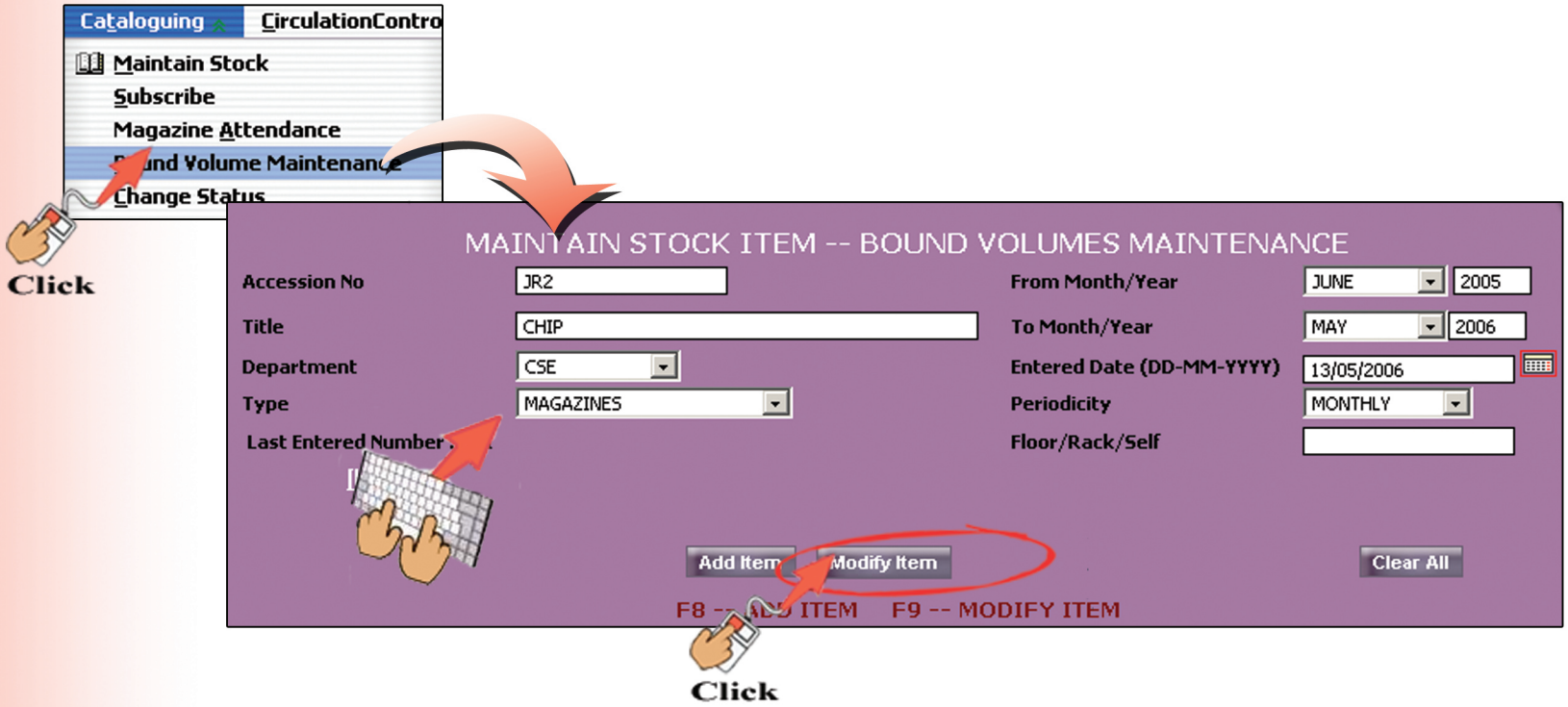
2. Click ***Add Item*** or press ***F8*** to add the Bound Volume to the stock.

End Task

Task 10: Edit Bound Volume Items

Start Here

To edit Bound volumes click Ca*taloguing* (Alt+T), ***Bound Volume Maintenance (B)*** in main menu.



1. To Modify an existing Bound Volume Enter the ***Accession Number*** and then modify the required fields.

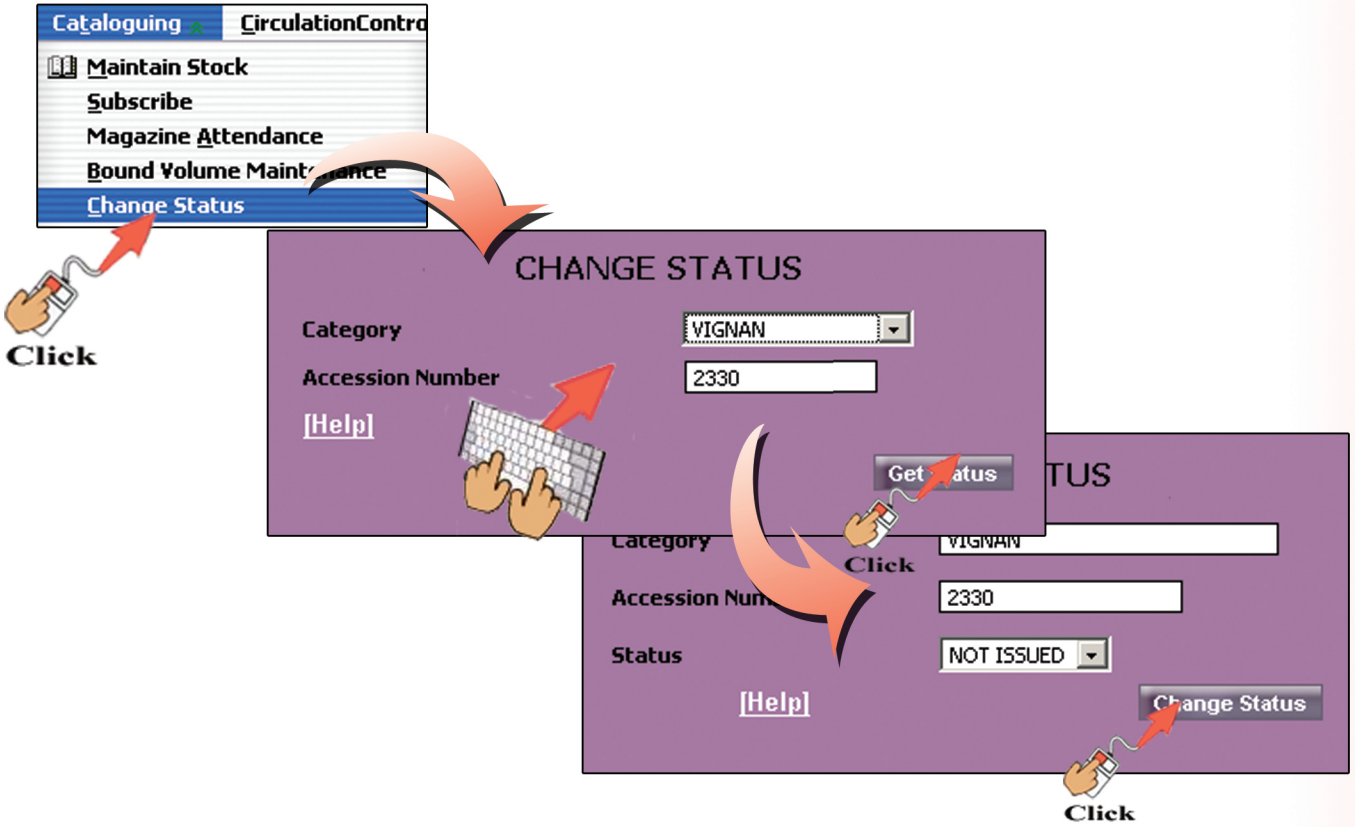
2. Click ***Modify Item*** or press ***F9*** to modify the Bound Volume to the stock.

End Task

Task 11: Change Status

Start Here

To chage the status of items click Ca*taloguing* (Alt+T*), Change Status (C)* in main menu.



1. To change Status of an Item, first select the ***Category*** and enter ***Accession Number.***

2. Now press tab or click ***Get Status*** Button to obtain the current status of the item. Modify the ***Status.***

3. Now click ***Change Status*** to change the status of the item.

End Task

PART 5

Account Holders Maintenance

This feature provides the service to create/ delete / modify accounts for the users of the system. The users can be maintained by the DEO or the Administrator.

These include

Account Maintenance Manual &

Account Maintenance Automate

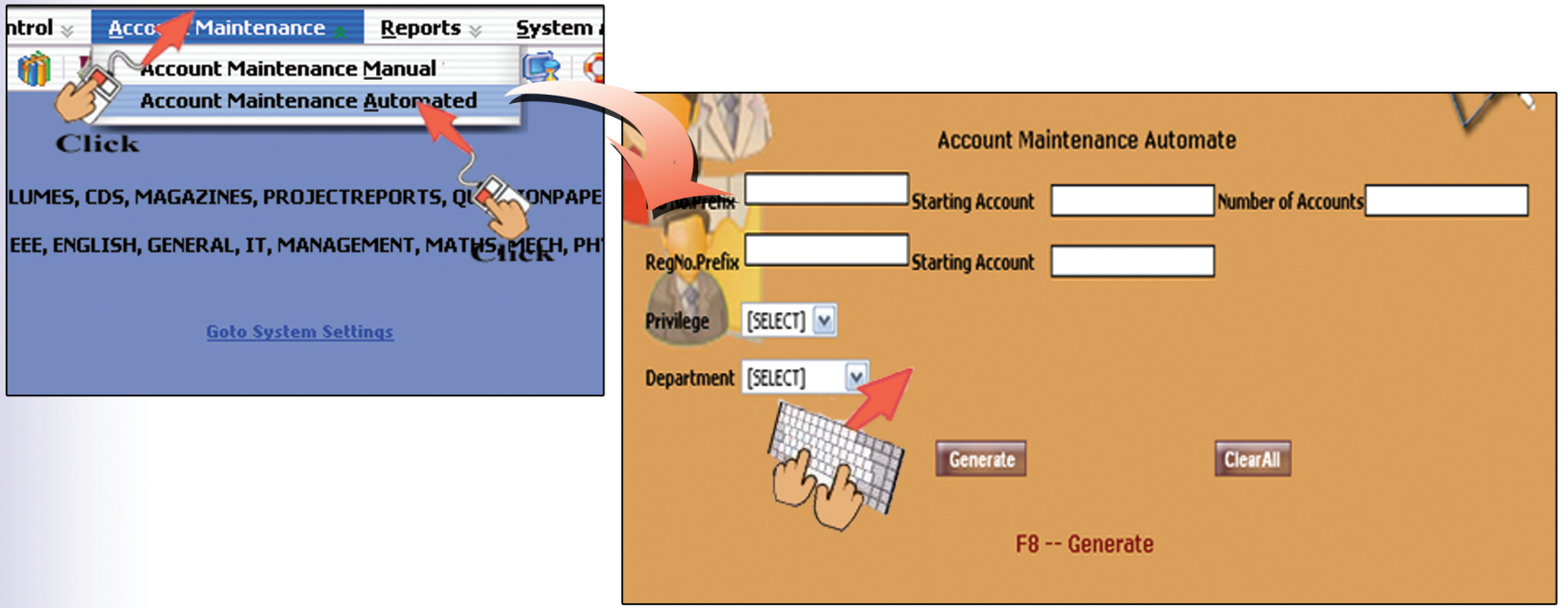
The services provided by the library are used by the “Account Holders”. Each Account Holder is provided an account to logon and use the application.

Tasks

Task#		Page#
1	Account Creation Automate	5.3
2	Account Creation Manual	5.5
3	Modifying Account	5.7
4	Deleting Account	5.8

Task I : Account Creation Automate

Start Here

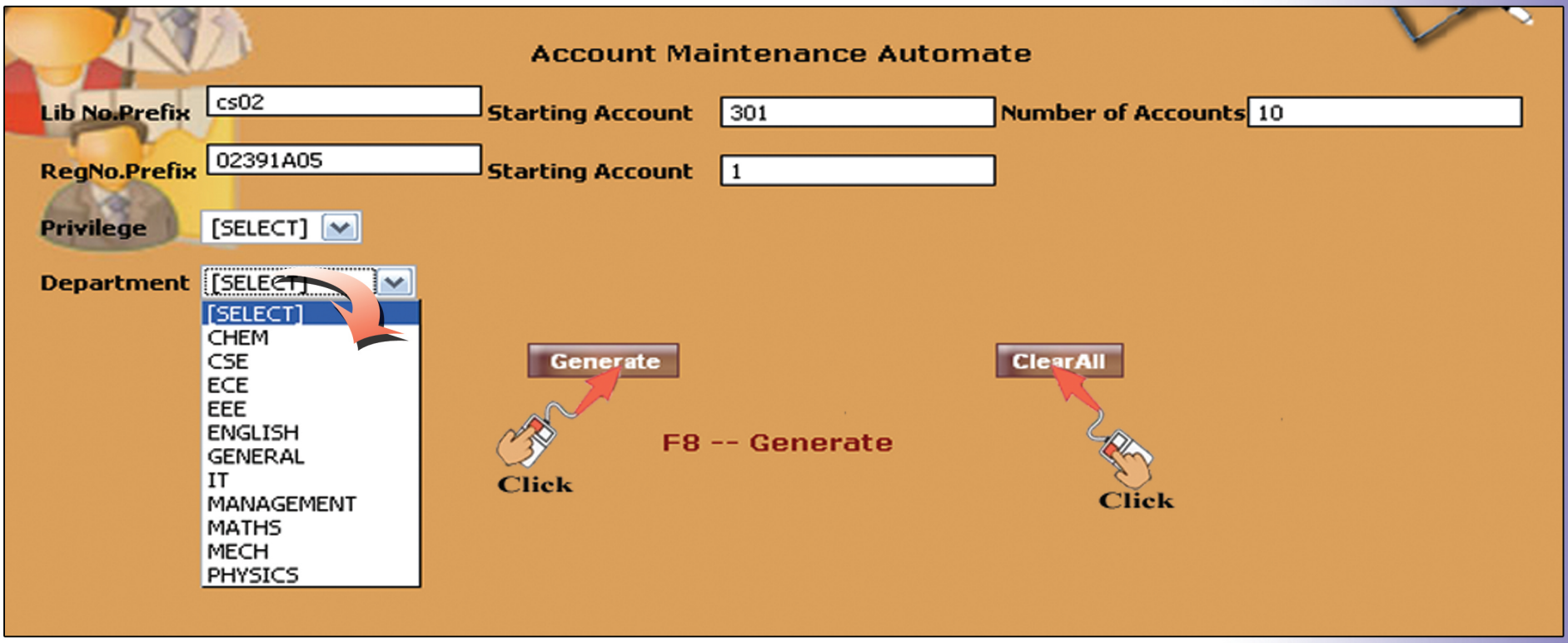


1. Click ***Account Maintenance*** and select ***Account Maintenance Automate***

2. Enter the ***LibNo.Prefix*** , ***starting Account*** and ***Number of Accounts***

3. Enter the ***RegNo.Prefix*** (college Id) and ***Starting Account***

Next Step



4 Select the ***Privilege*** and ***Department*** by clicking the combo box.

5 Click the ***Generate (F8)*** button to create the ***Accounts***

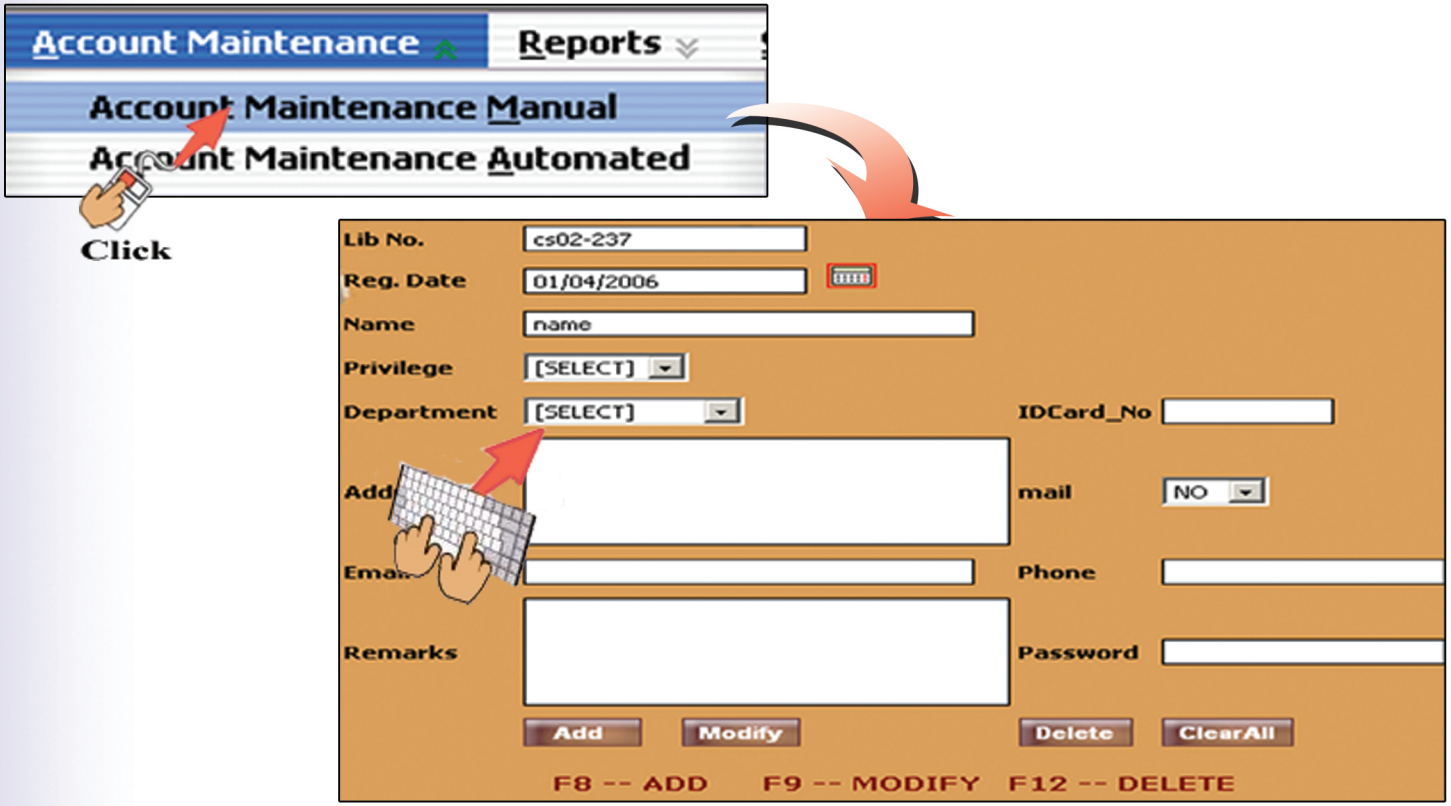
6 Click the ***ClearAll*** button to clear all values

! All the Fields are mandatory, no fields should be kept empty.

End Task

TASK 2 : ACCOUNT CREATION MANUAL

Start Here

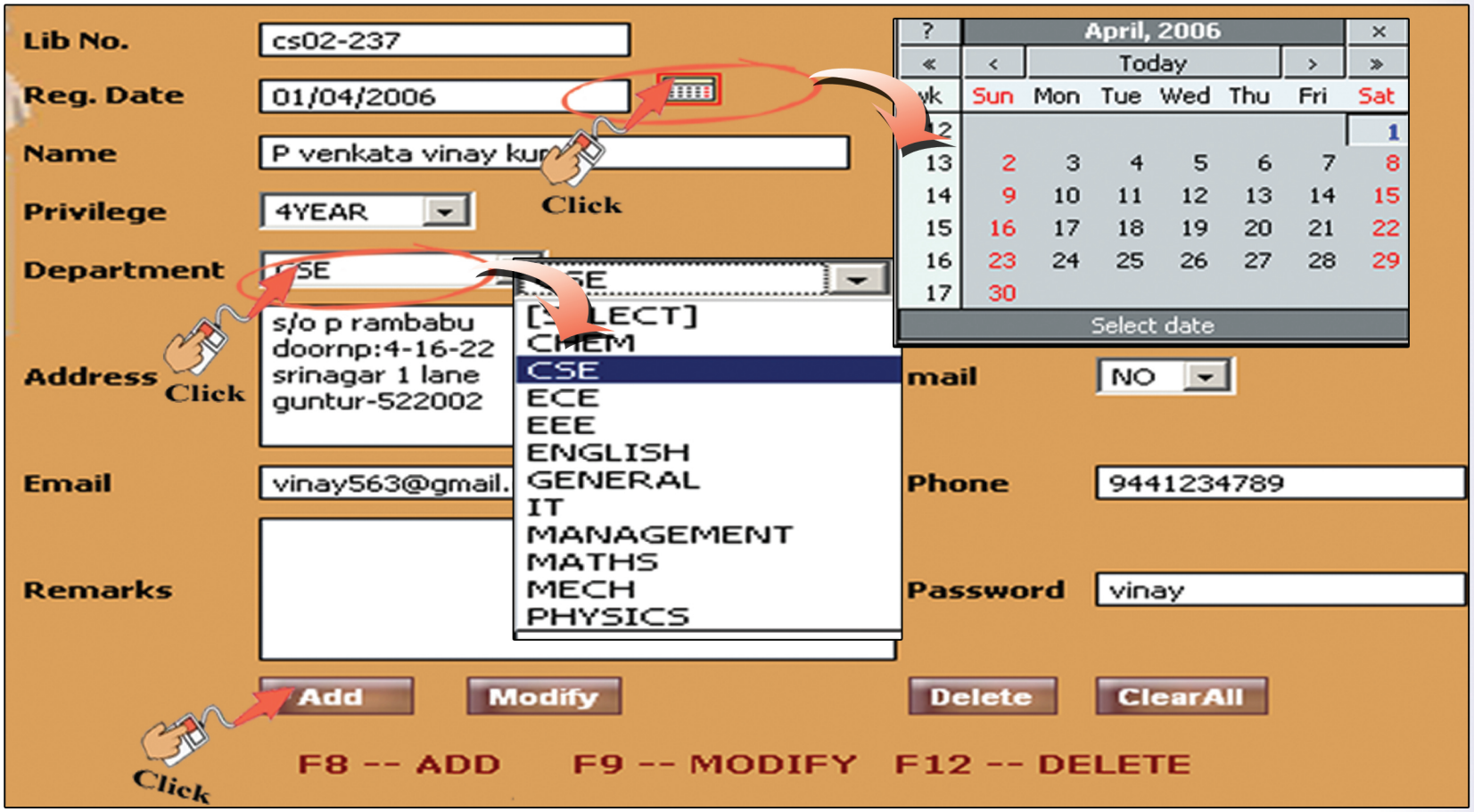


1. Click ***Account Maintenance*** and selesct ***Account Maintenance Manual .***

2. Enter the ***LibNo*** , ***Regd . Date , Name .***

3. Enter the ***IDCard_No*** (College Id) and select the ***Mail*** to YES or NO .

Next Step



4. Select the ***Privilege*** and ***Department*** by clicking the combo box.

5. Enter the ***address*** , ***email*** , ***phone*** , ***password***

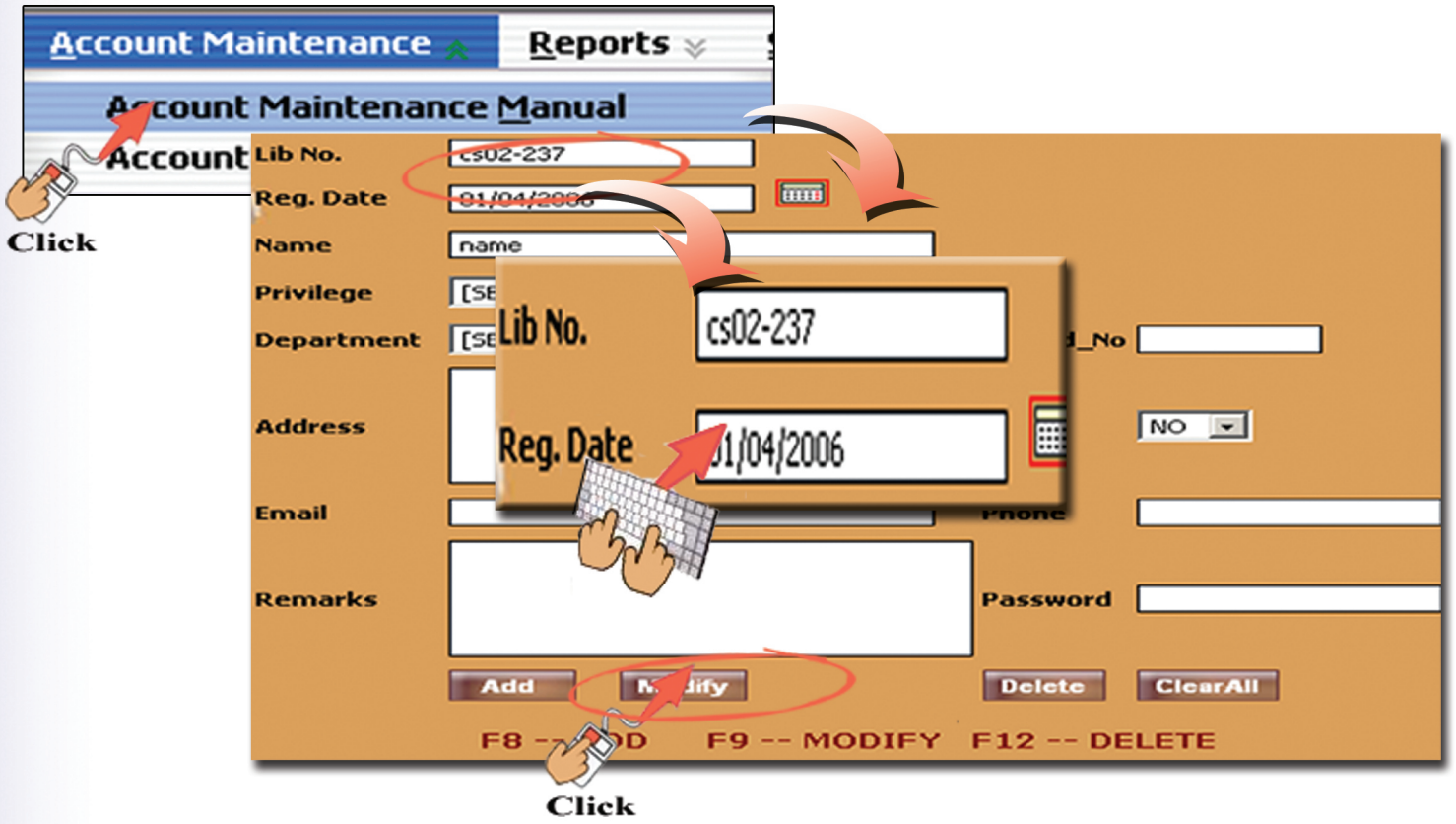
6. Click the ***Add*** (F8) button to create the *Account* .

No need to enter all fields LibNo , Date , Privilege , Department , ID_CardNo are mandatory

End Task

Task 3 : Account Modification

Start Here



1. Click ***Account Maintenance*** and select ***Account Maintenance Manual***

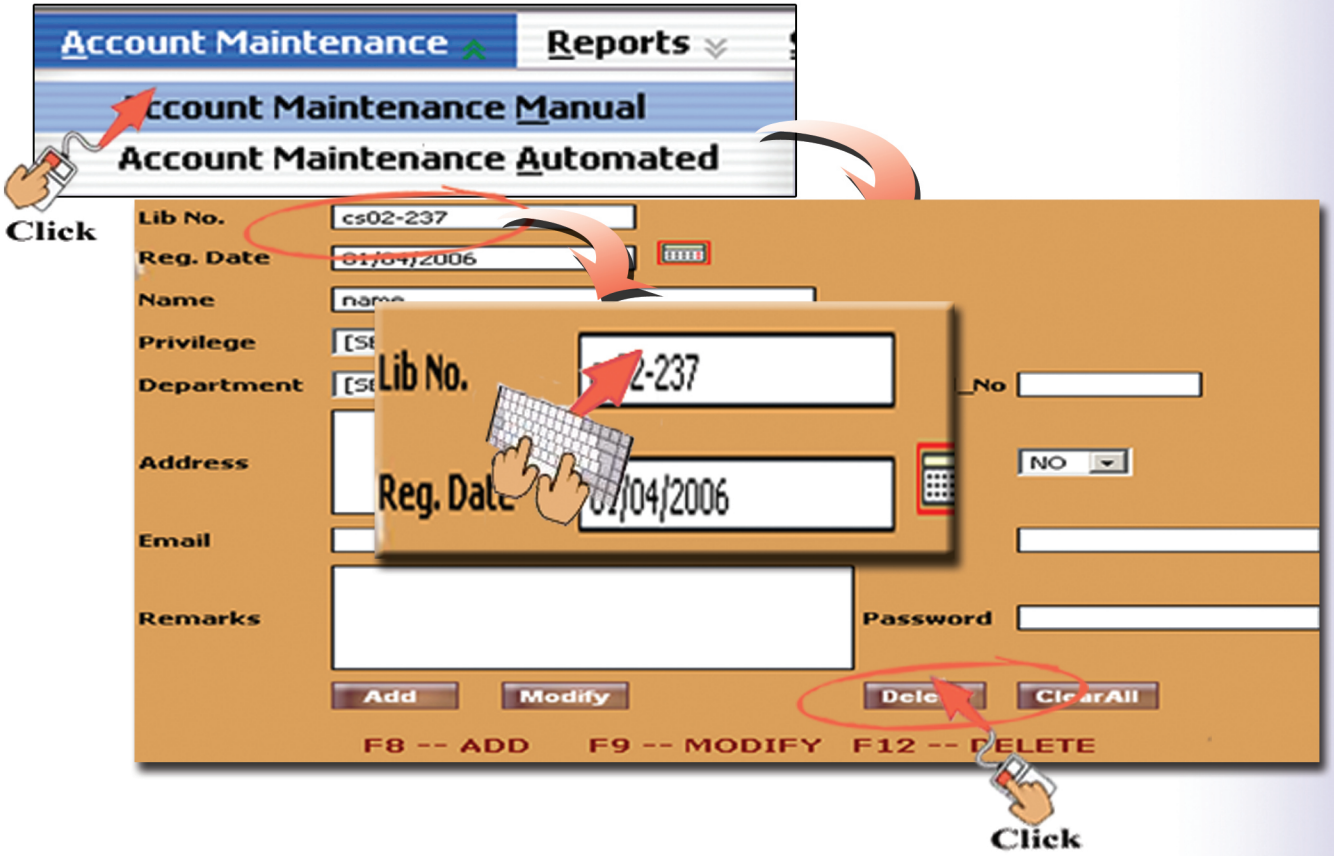
2. Enter the ***LibNo and*** press Tab key on keyBoard .

3. Modify the Details wnated to be changed and press ***Modify (F9)*** .

End Task

Task 4 : Account Deletion

Start Here



1. Click ***Account Maintenance*** and select ***Account Maintenance Manual***

2. Enter the ***LibNo and*** press Tab key on keyBoard **.**

3. Click the ***Delete (F12)*** to delete the ***Account.***

End Task

PART 6

Circulation Control

ezLIB provides circulation control that is meant for transactions of library Items in the system.This feature is available to IIC and Admin.
The services provided by this feature are

Issue Items	--The library items are issued using this service
Return Items	-- The issued library items are returned using this service
Renew Items	-- The issued library items are renewed using this service
Open Reservation Queue	-- To activate the reservation of items in a category.
Close Reservation Queue	-- To disable the reservation of items in a category.
Maintain Reservation Queue	-- To update the reservation Queues of items in a category.

These services are discussed in detail in this part.

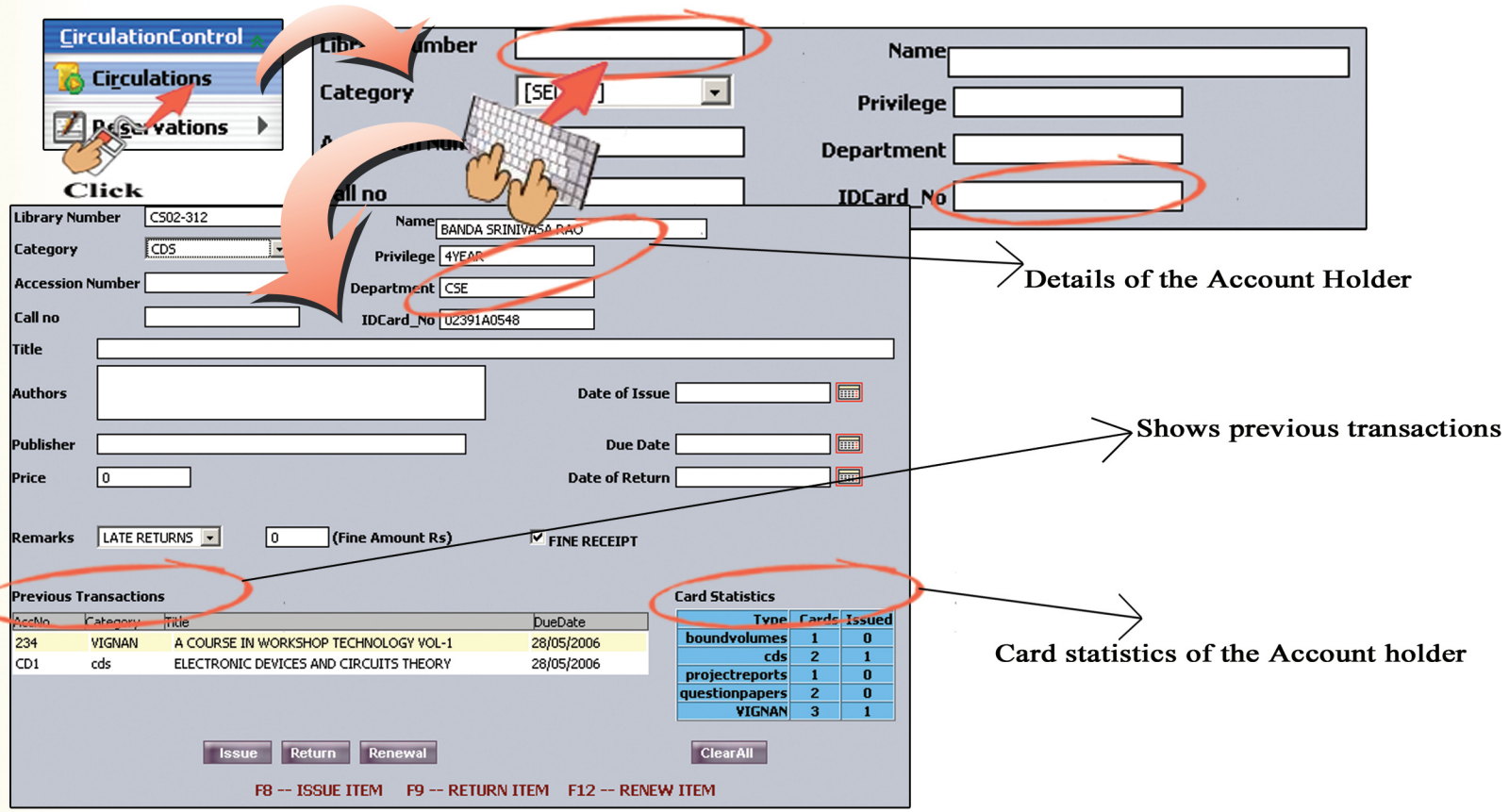
Tasks

Task#		Page#
1	Issue Item	6.3
2	Return Item	6.5
3	Renew Item	6.7
4	Open Reservation Queue	6.8
5	Close Reservation Queue	6.9
6	Maintain Reservation Queue	6.10

TASK 1 : ISSUE ITEMS

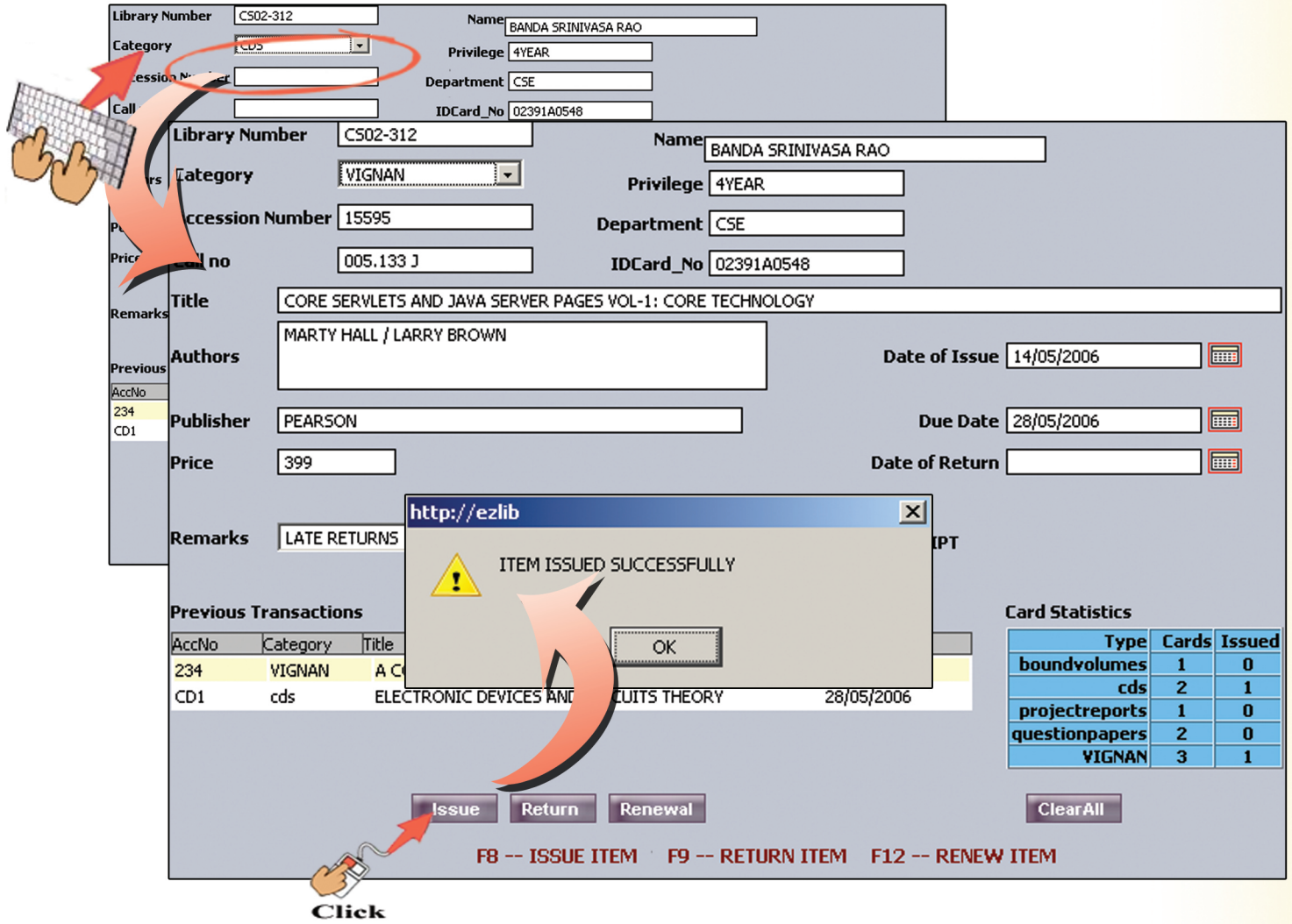
Start Here

To issue items to account holders click ***CirculationControl*** (Alt+C), ***Circulations(r)*** in main menu.



1. To issue items to an account holder, enter the ***LIbrary Number*** or ***IDCard_No*** and press tab or enter.
2. Now the details of the account holder are shown.
3. The ***Previous Transactions*** and ***Card Statistics*** of the account holder can be seen.

Next Step



4. Select the ***Category*** and enter the ***Accession Number*** (shown in selection) of the item to be issued.

5. Press tab or enter, the details of the book will be displayed if the book is not issued to any other account holder else alert is displayed.

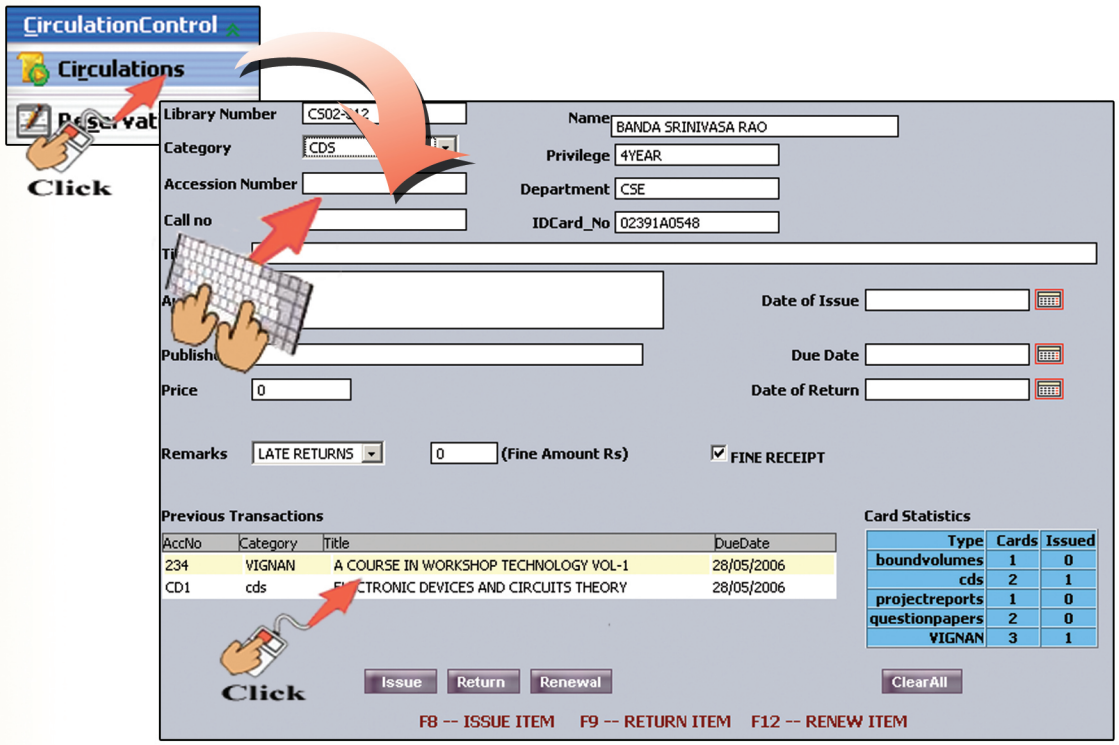
6. Click ***Issue*** or press ***F8*** to issue the item, message is displayed.

End Task

TASK 2 : RETURN ITEMS

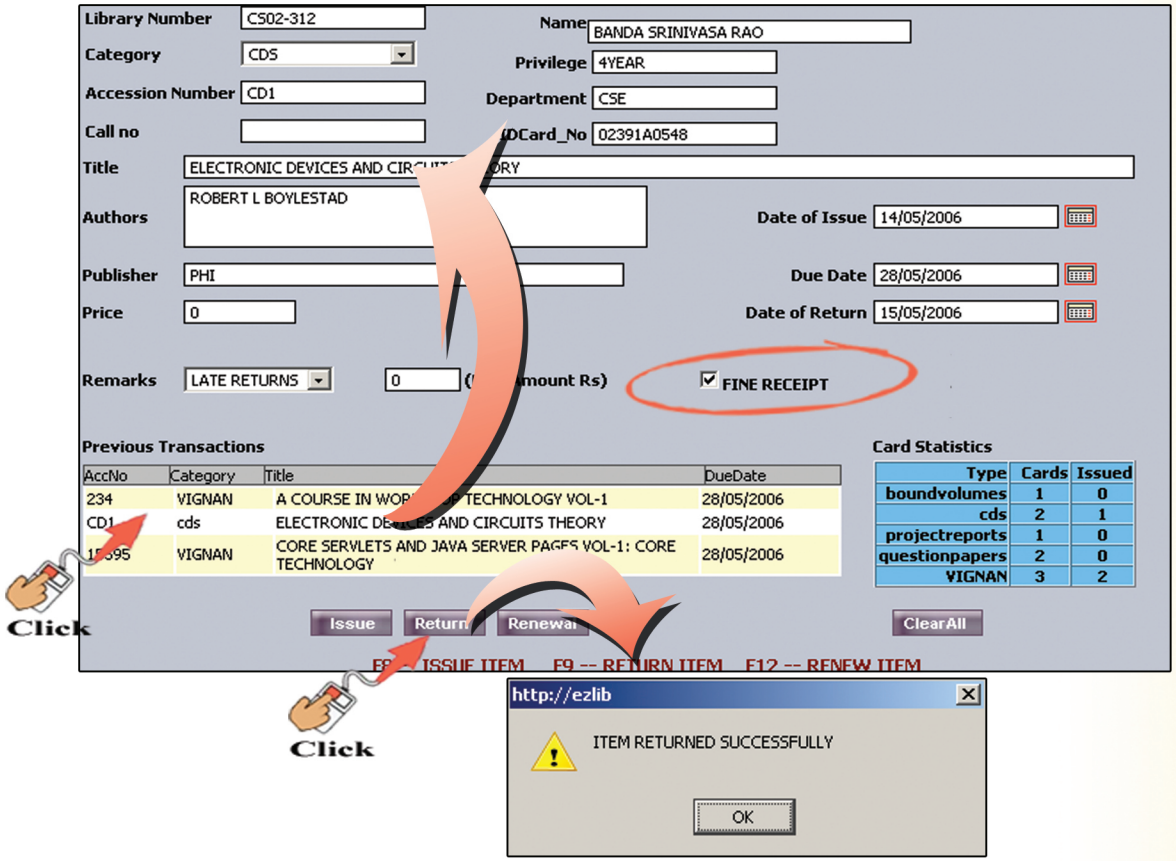
Start Here

To take back the items from account holders click ***CirculationControl*** (Alt+C), ***Circulations(r)*** in main menu.



1. To take back items from an account holder, enter the ***LIbrary Number*** or ***IDCard_No*** and press tab or enter.
2. Click on the item in the ***Previous Transactions*** which the account holder is going to return.
3. Else select the ***Category***, enter the ***Accession Number*** and press tab or enter key.

Next Step



4. Fines can be imposed on account holder in case of late returns or damage or in case item is Lost these has to be selected in ***Remarks*** and ***amount*** is entered and ***Fine Reciept*** (shown in selection) must be Cheked to generate a reciept for the fine.

5. Click ***Return*** or press ***F9*** .

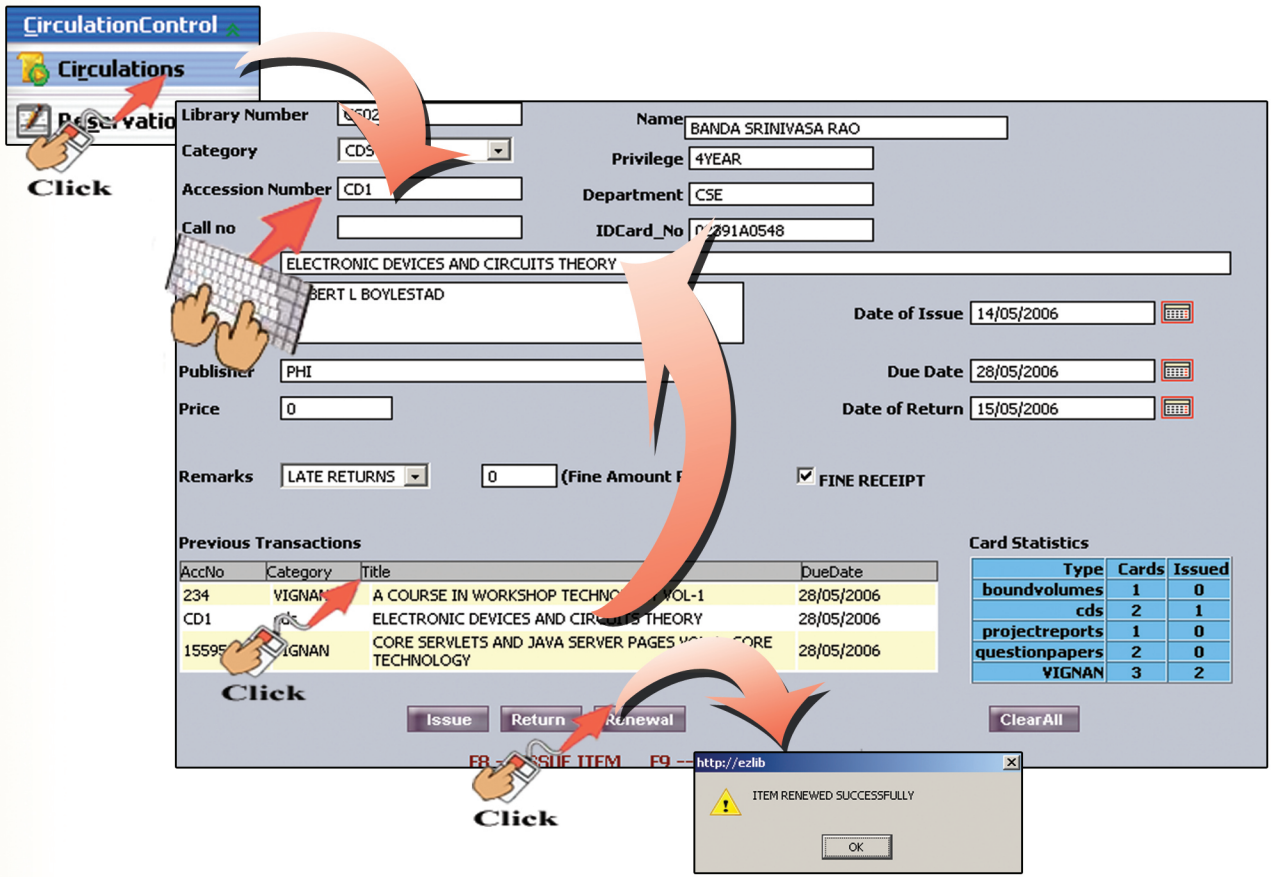
6. Message is displayed after successful return, item cant be returned in less than one day

End Task

TASK 3 : RENEW ITEMS

Start Here

To renew an items for account holders click ***CirculationControl*** (Alt+C), ***Circulations(r)*** in main menu.



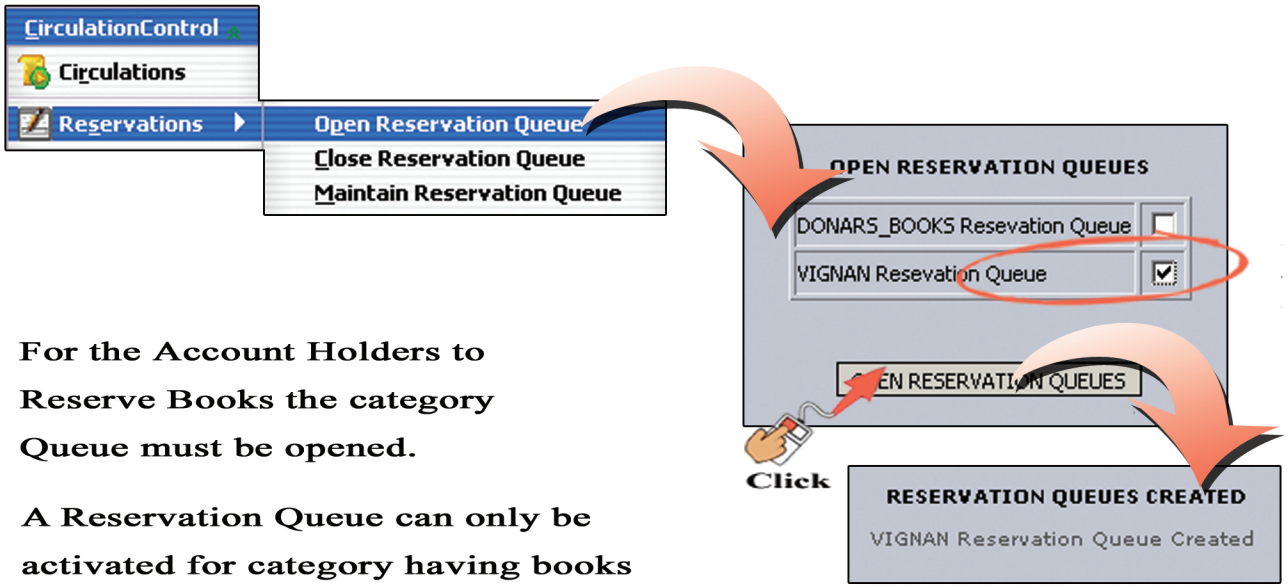
1. To renew an item for an account holder, enter the ***LIbrary Number*** or ***IDCard_No*** and press tab or enter.
2. Click on the item in the ***Previous Transactions*** which the account holder is going to return.
3. Click ***Renewal*** or press ***F12*** to renoew the item, message is displayed on successful renewal..

End Task

Task 4 : Open Reservation Queue

Start Here

To Open a Reservation Queue click ***CirculationControl (Alt + C),Reservations(S), Open Reservation Queue (p)*** in main menu



For the Account Holders to Reserve Books the category Queue must be opened.

A Reservation Queue can only be activated for category having books and whose issue is in terms of number of items but not in terms of amount.

1. Select the ***Category*** by checking the check box beside the category (shown in selection).

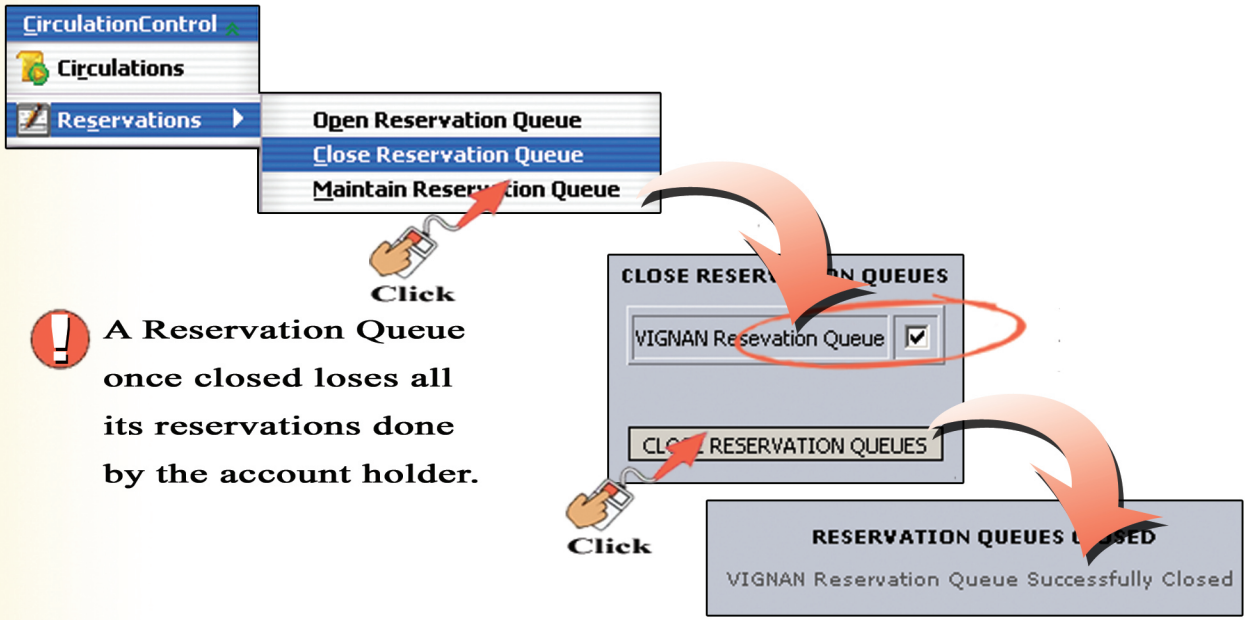
2. Click ***OPEN RESERVATION QUEUES*** to open the reservations.

End Task

Task 5 : Close Reservation Queue

Start Here

To Close a Reservation Queue click ***CirculationControl (Alt + C),Reservations(S), Close Reservation Queue (p)*** in main menu



A Reservation Queue once closed loses all its reservations done by the account holder.

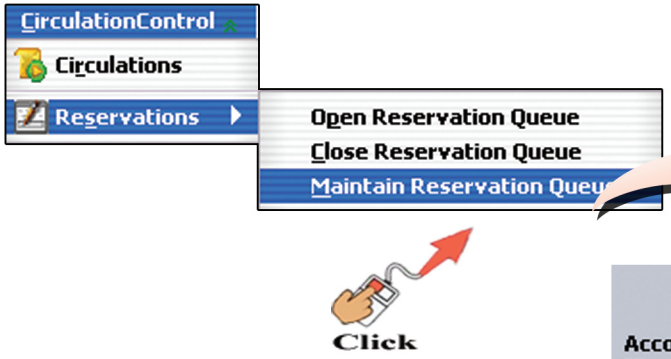
1. Select the ***Category*** by checking the check box beside the category (shown in selection).

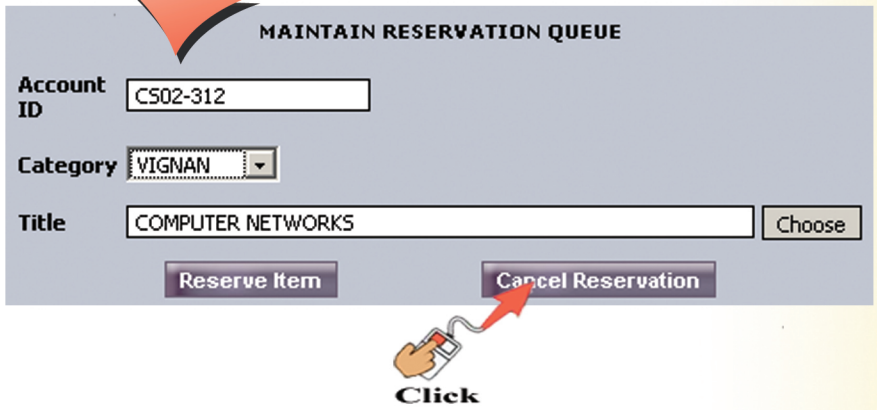
2. Click ***CLOSE RESERVATION QUEUES*** to open the reservations.

TASK 6 : MAINTAIN RESERVATION QUEUE

Start Here

To maintain a Reservation Queue click ***CirculationControl (Alt + C),Reservations(S), Maintain Reservation Queue (p)*** in main menu





! A title can be reserved only by a maximum of 5 account holders.

1. Enter ***Account ID*** select the ***Category*** shows the reserved book. Click ***Cancel Revervation*** to cancel th reservation.

2. To reserve item select title by Choose option shown in ***PART4*** and then click Reserve Item.

End Task

PART 7

UTILITIES

Utilities including scheduler, mails, polls and Suggestion box improve the interaction between the librarian and the account holders.This is Available only for administrator.

The librarian can create polls to order the new books for the library.

The librarian can send mails to the account holders who have mail privilege.

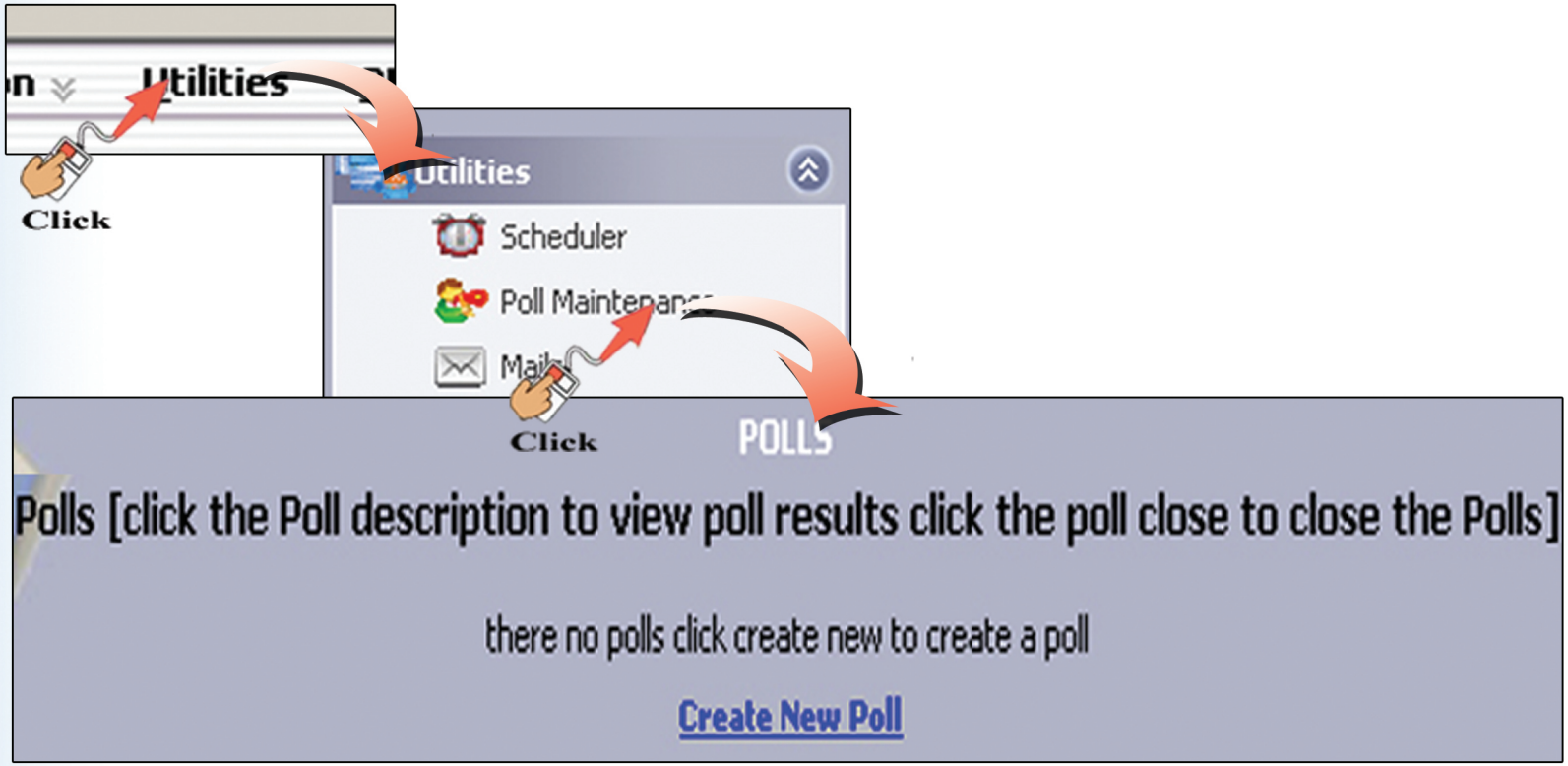
The librarian can see the suggestions sent by the account holders.

Tasks

Task#		Page#
1	Poll Creation	7.3
2	Poll Closing And Deleting	7.5
3	Mails	7.6
4	Suggestion Box	7.8
5	Notices	7.9

TASK 1 : POLL CREATION

Start Here

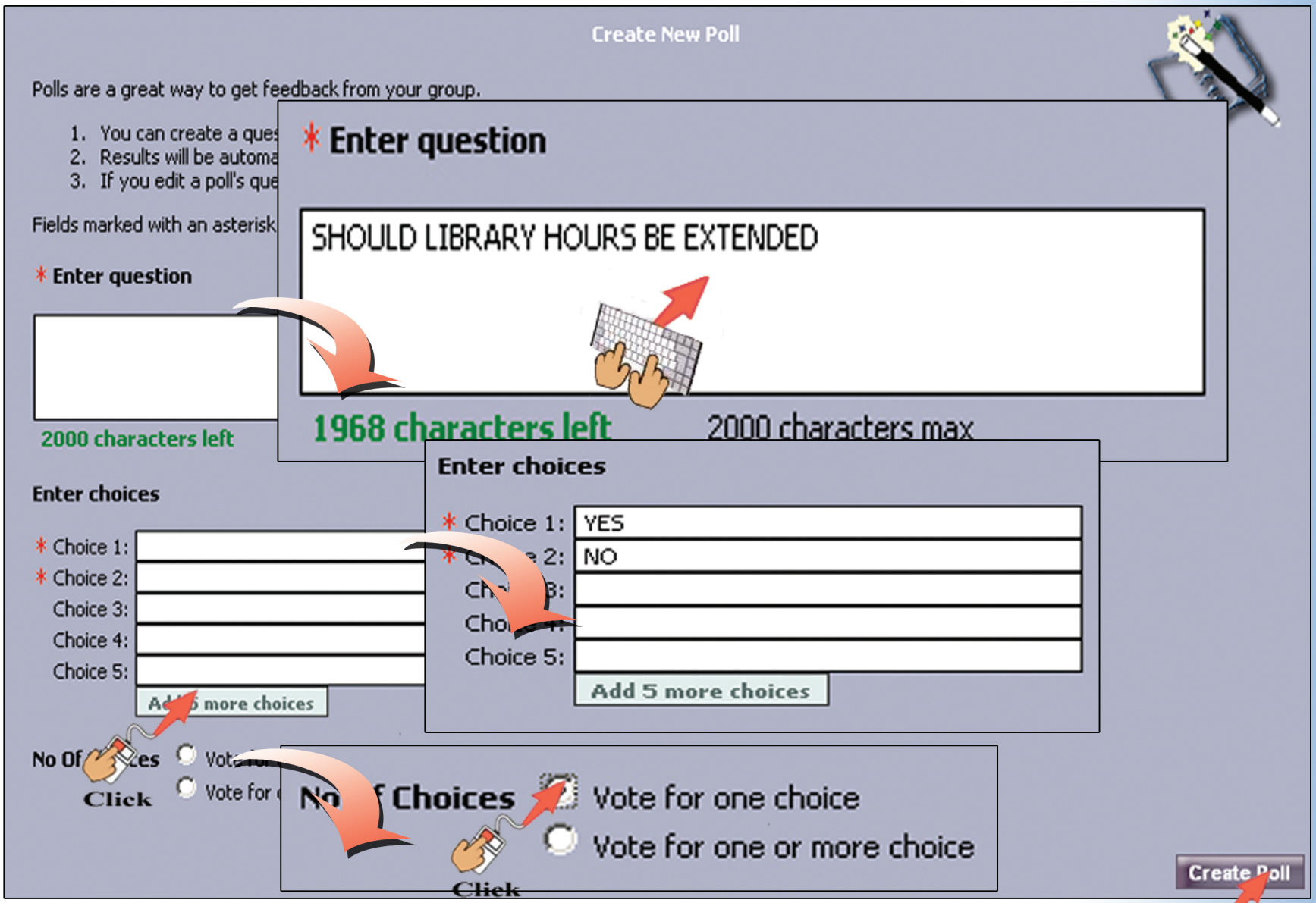


1. Click ***Utilities*** and select ***Poll Maintenance***

2. After clicking the ***Poll Maintenance*** *you will be displayed with the Poll Maintenance screen with the already existing Polls*

3. Click Create New Poll to create a new poll

Next Step



4 **Enter the Question of the Poll**

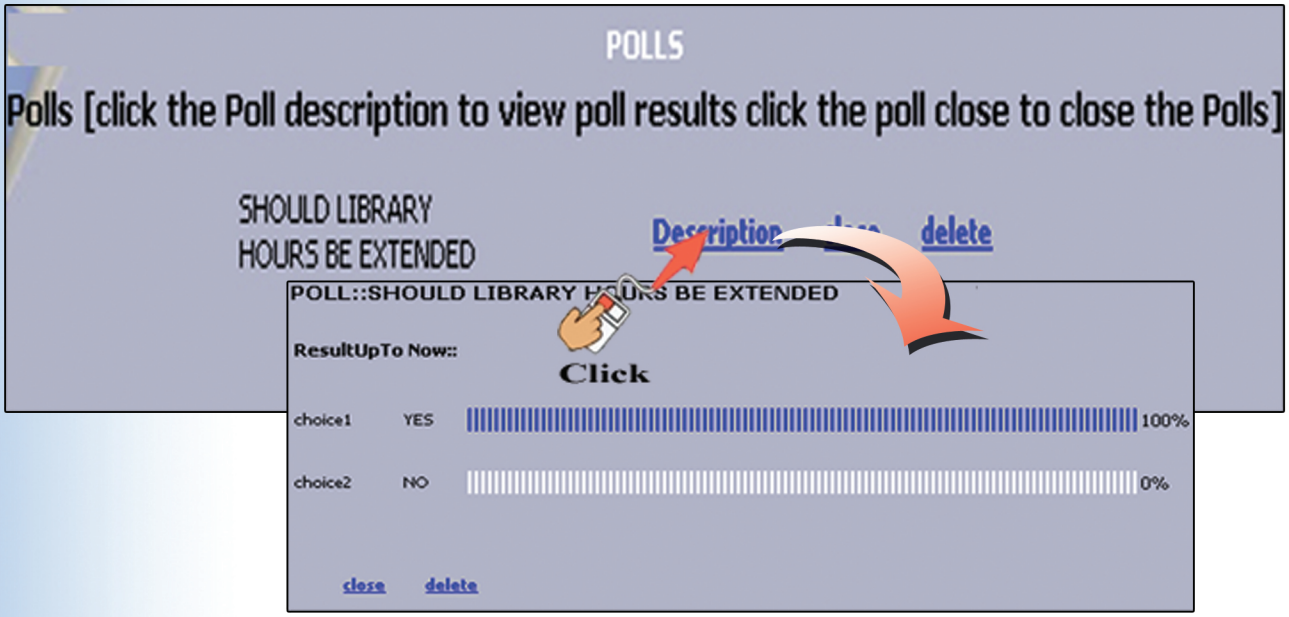
5 ***Enter the Poll Choices we can add more no of choices by clicking Add 5more Choices.***

6 **Select No of Choices and Click create Poll**

End Task

Task 2 : Poll Closing and Deletion

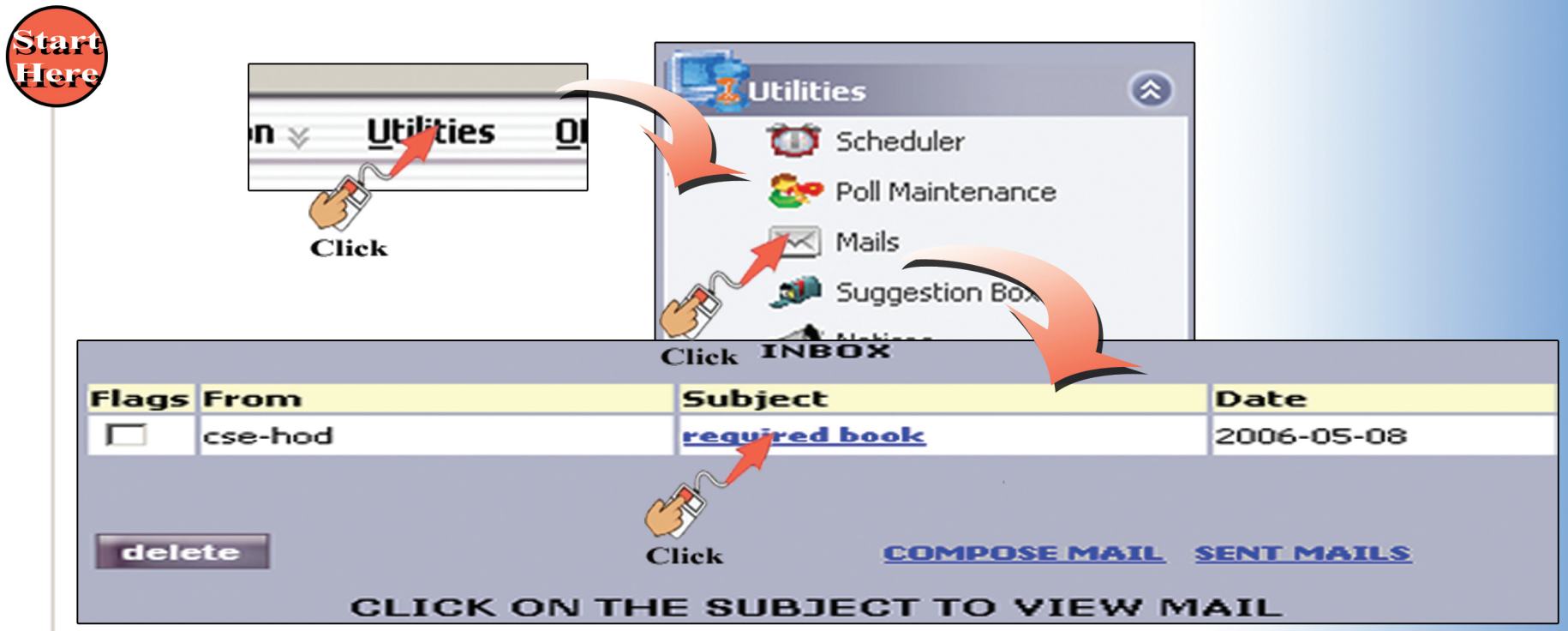
Start Here



1. Click on ***Description*** *to view the Poll result*
2. *Click on* ***Close*** *to close the Poll*
3. Click on ***Delete*** to delete the Poll

End Task

Task 3 : Mails Inbox and Sending Mails

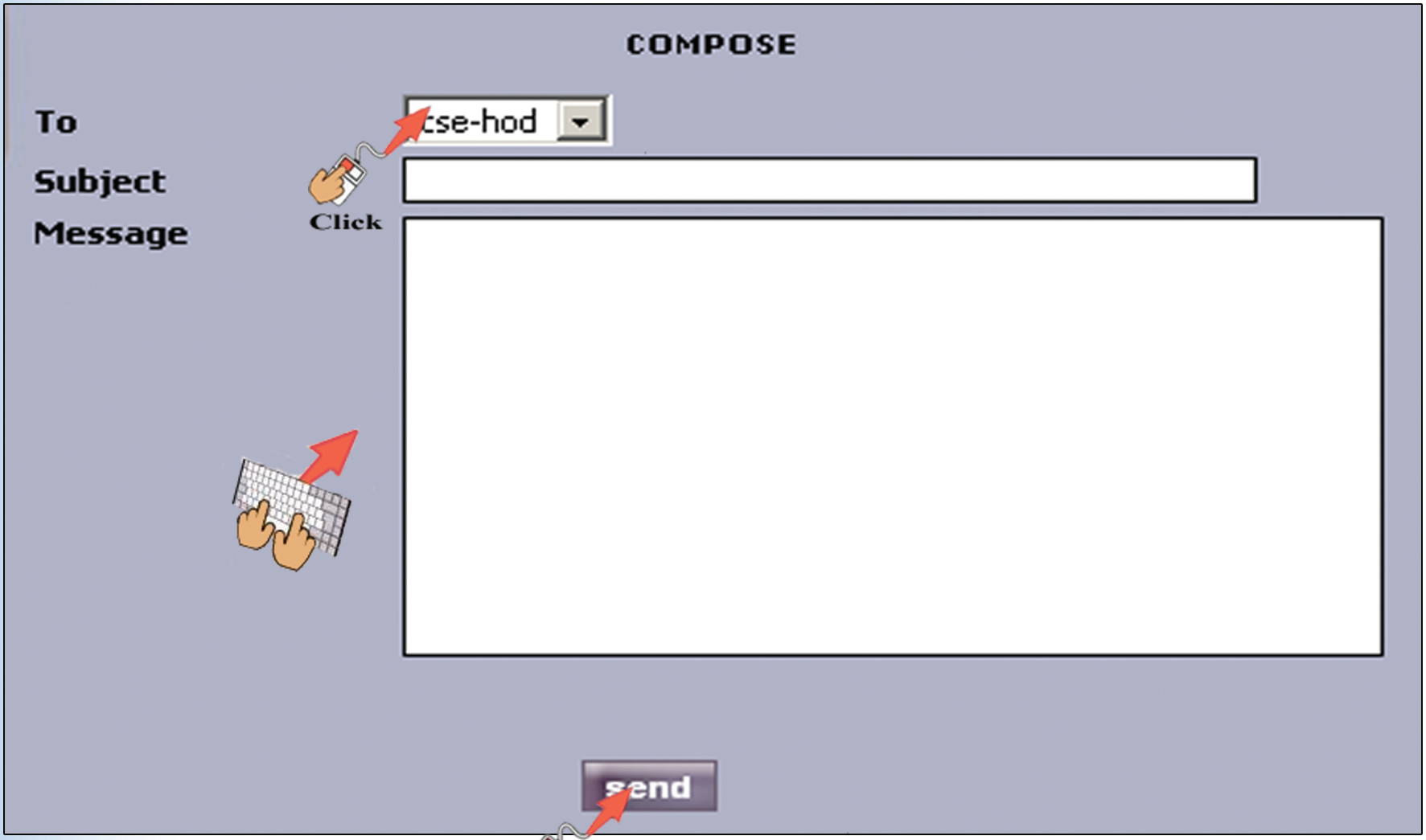


1. Click on ***utilities*** *and select* ***Mail*** to view the ***INBOX***

2. Click on ***Subject*** to view the content of mail.

3. Click on ***Compose Mail*** to send a mail

Next Step



4. Select Account to send the mail

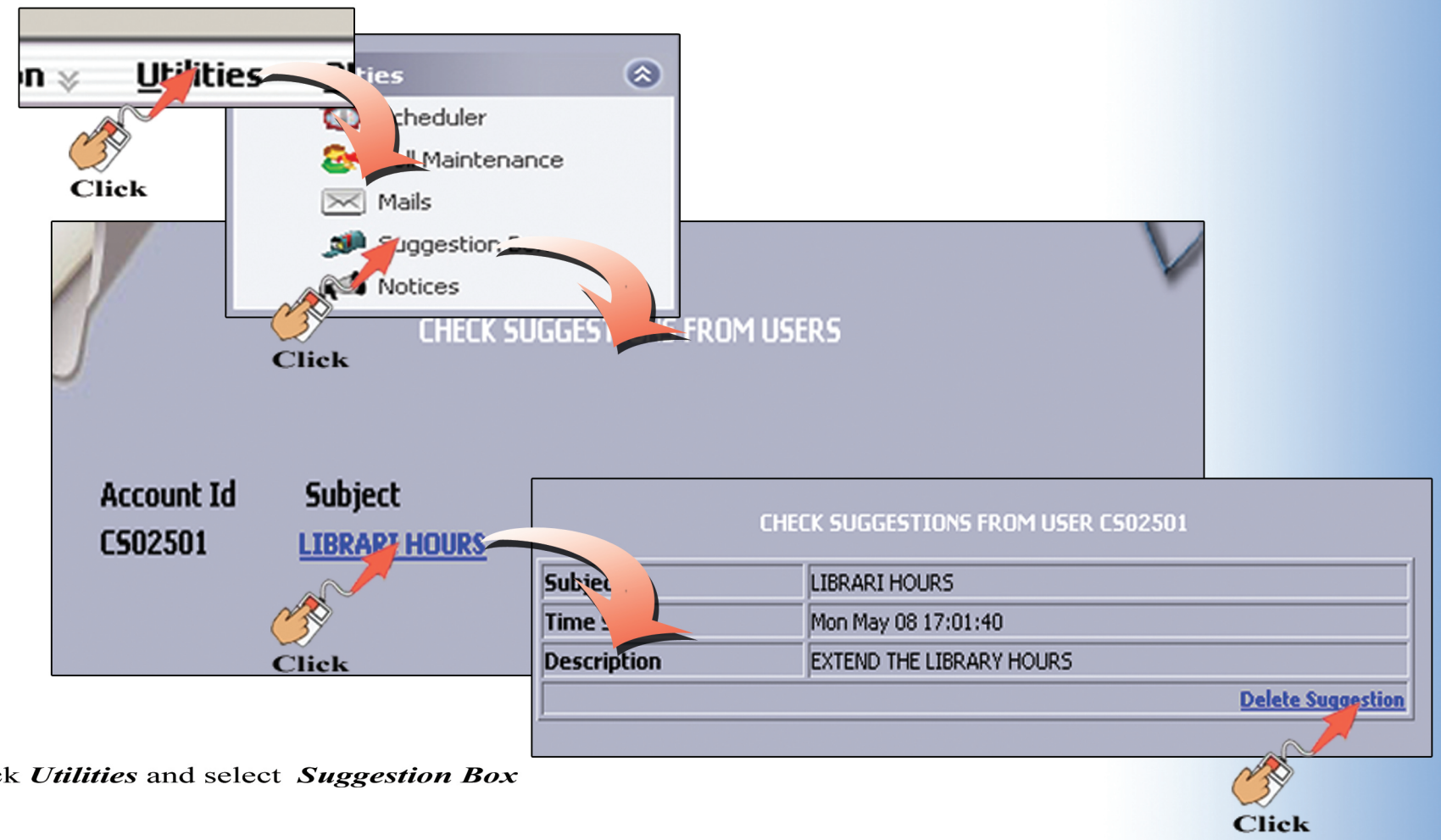
5. Enter the ***Subject*** and ***Message***.

6. Click on ***send*** to send the mail

End Task

Task 4 : Suggestion Box

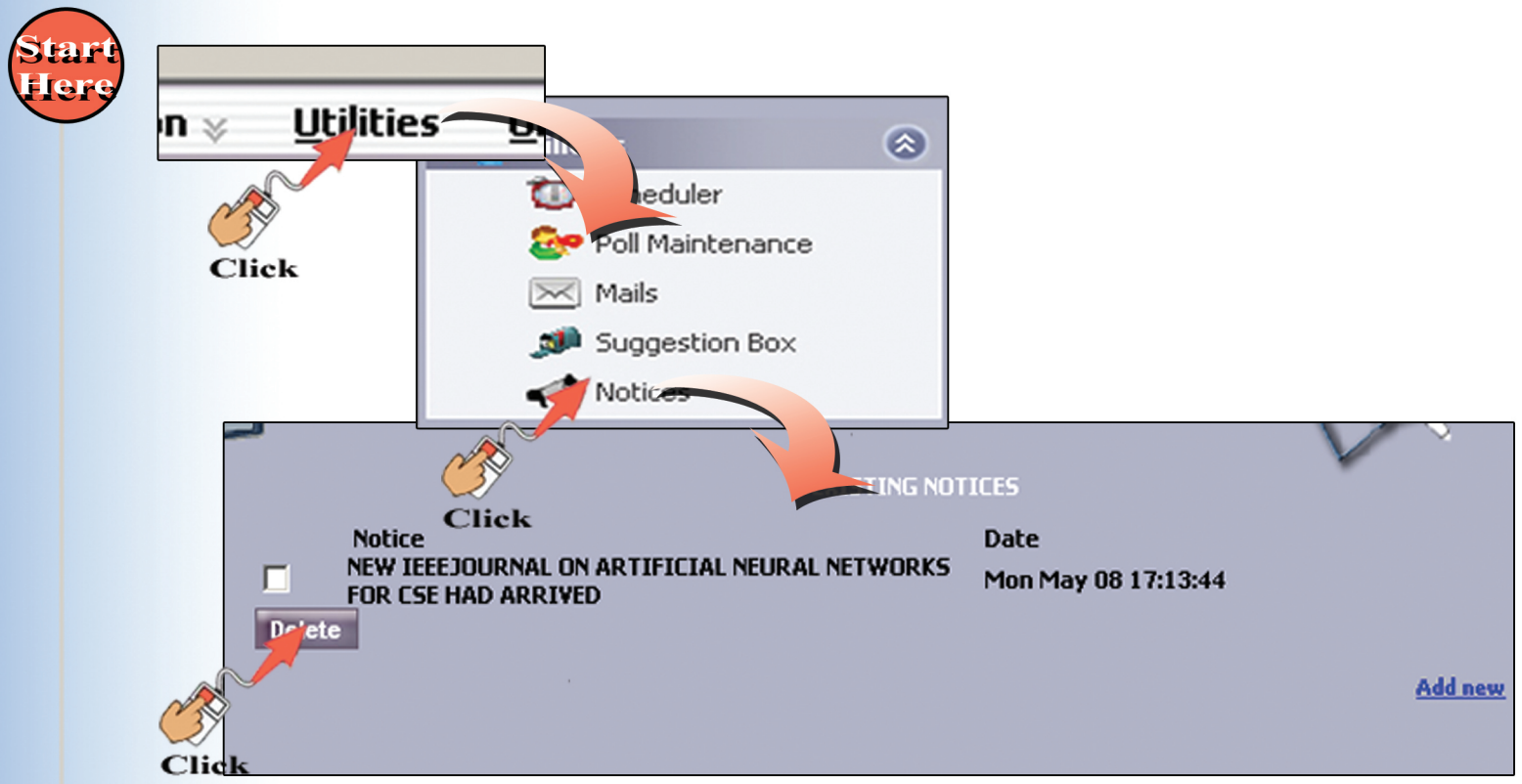
Start Here



1. Click ***Utilities*** and select ***Suggestion Box***
2. Click on ***subject*** to view the suggestion
3. Click on ***Delete Suggestion*** to delete the suggestion

End Task

TASK 5 : NOTICES

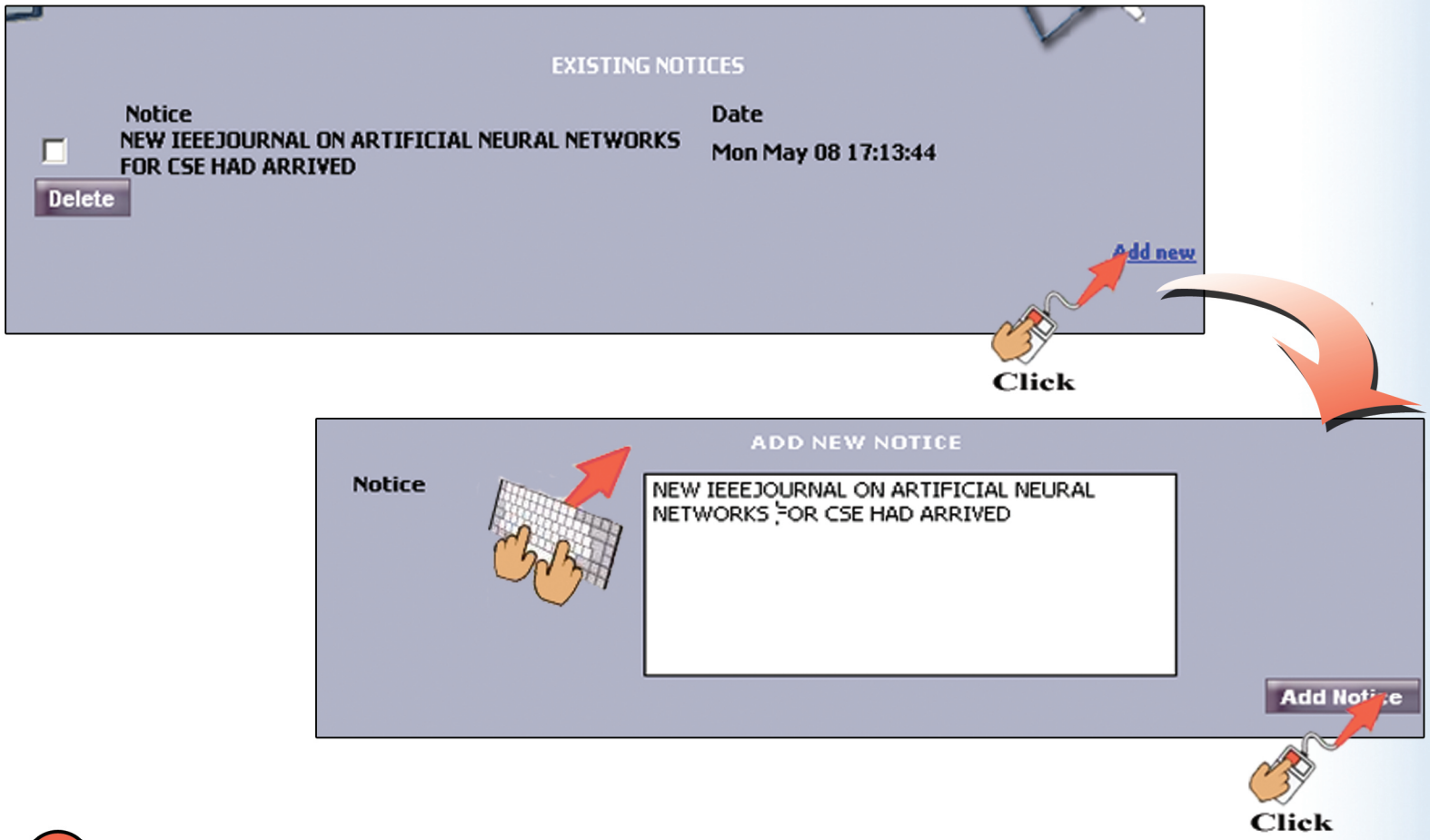


1. Click ***Utilities*** and select ***Notices***.

2. To Delete Existing Notice Click the Check box beside the notice.

3. Click ***Delete*** button to delete the notice.

Next Step



4. To add notice click ***Addnew***

5. Enter ***Notice*** data.

6. Click ***Add Notice*** Button to Add the notice.

End Task

PART 8

OPAC

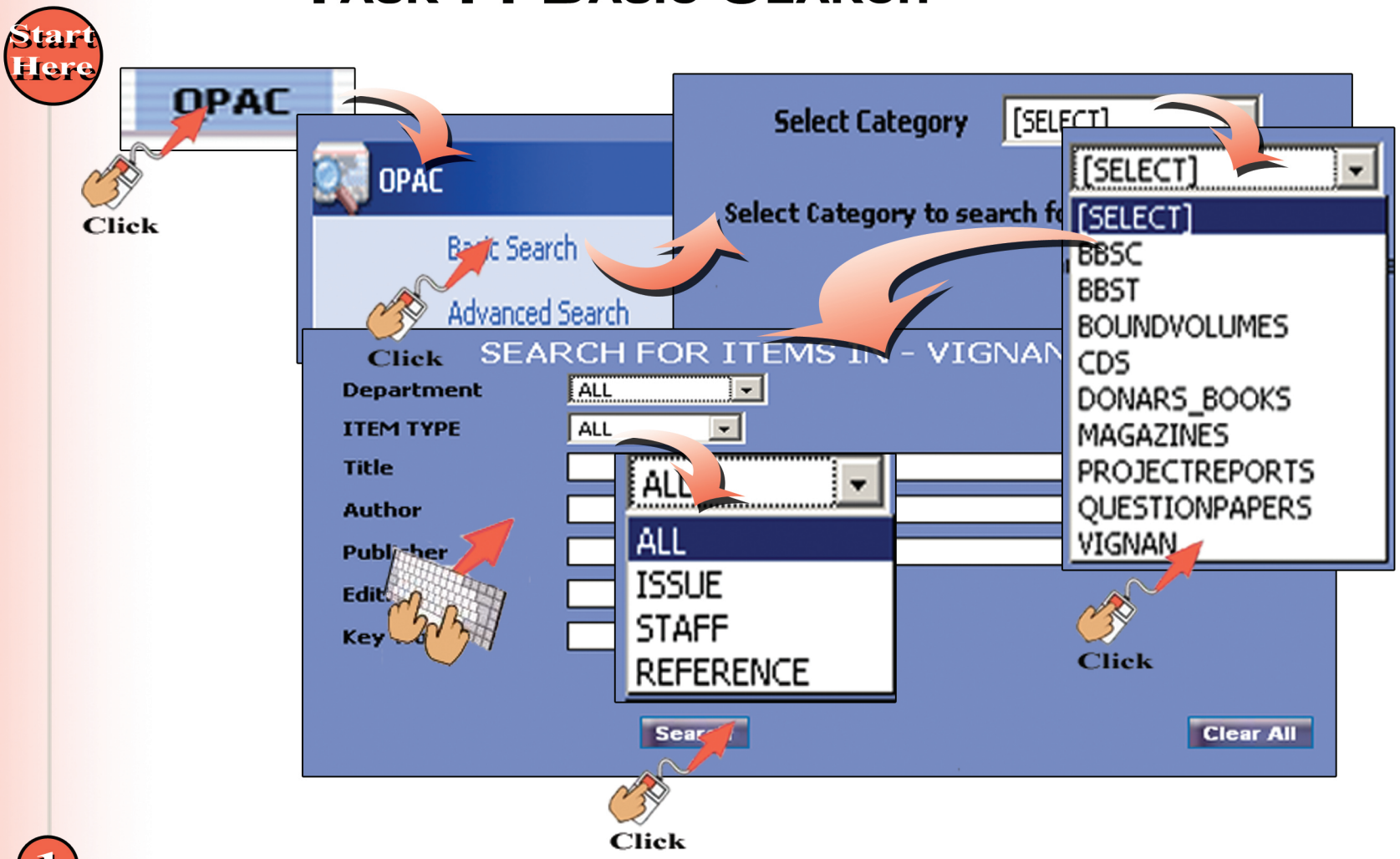
The purpose of this module is to facilitate the account holder or any user to search for book that is available in the library.

This includes two features like basic search which is provided to all items and advanced search which is available only for books.

Tasks

Task#		Page#
1	Basic Search	8.3
2	Advanced Search	8.5

TASK I : BASIC SEARCH

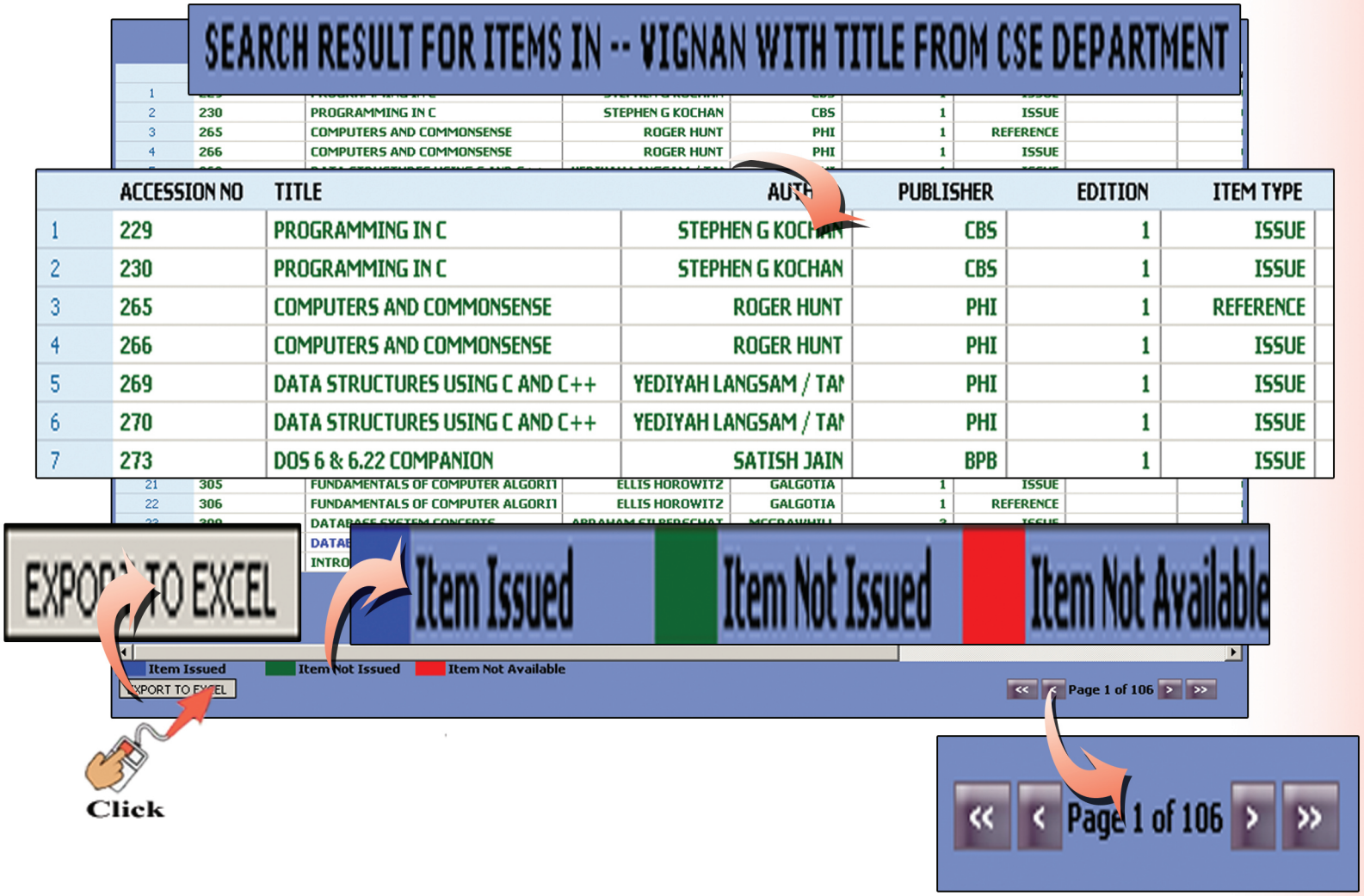


1. Click ***OPAC*** and select ***Basic Search.***

2. ***Select Category to search for the Catalogue item***

3. **Select the Department , Item Type and enter the Title, Author , Publisher etc. and click Search**

Next Step



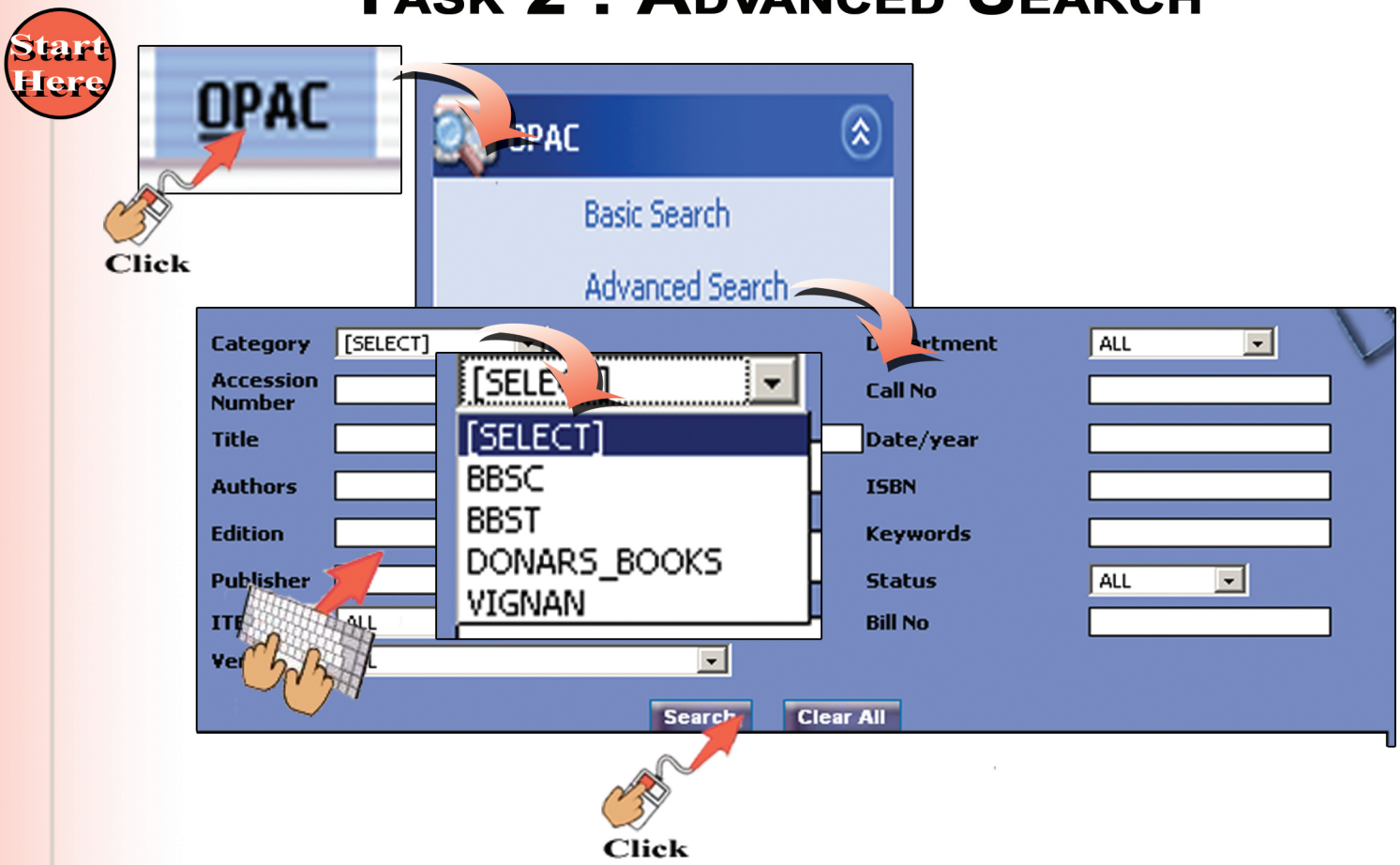
4 *Search results for the Catalogue will be displayed*

5 *On the Right Side bottom no of pages will be displayed and a navigator to navigate through the pages*

6 **On the Left side bottomthere is Export to Excel button by clicking we can export all search result to excel**

End Task

TASK 2 : ADVANCED SEARCH

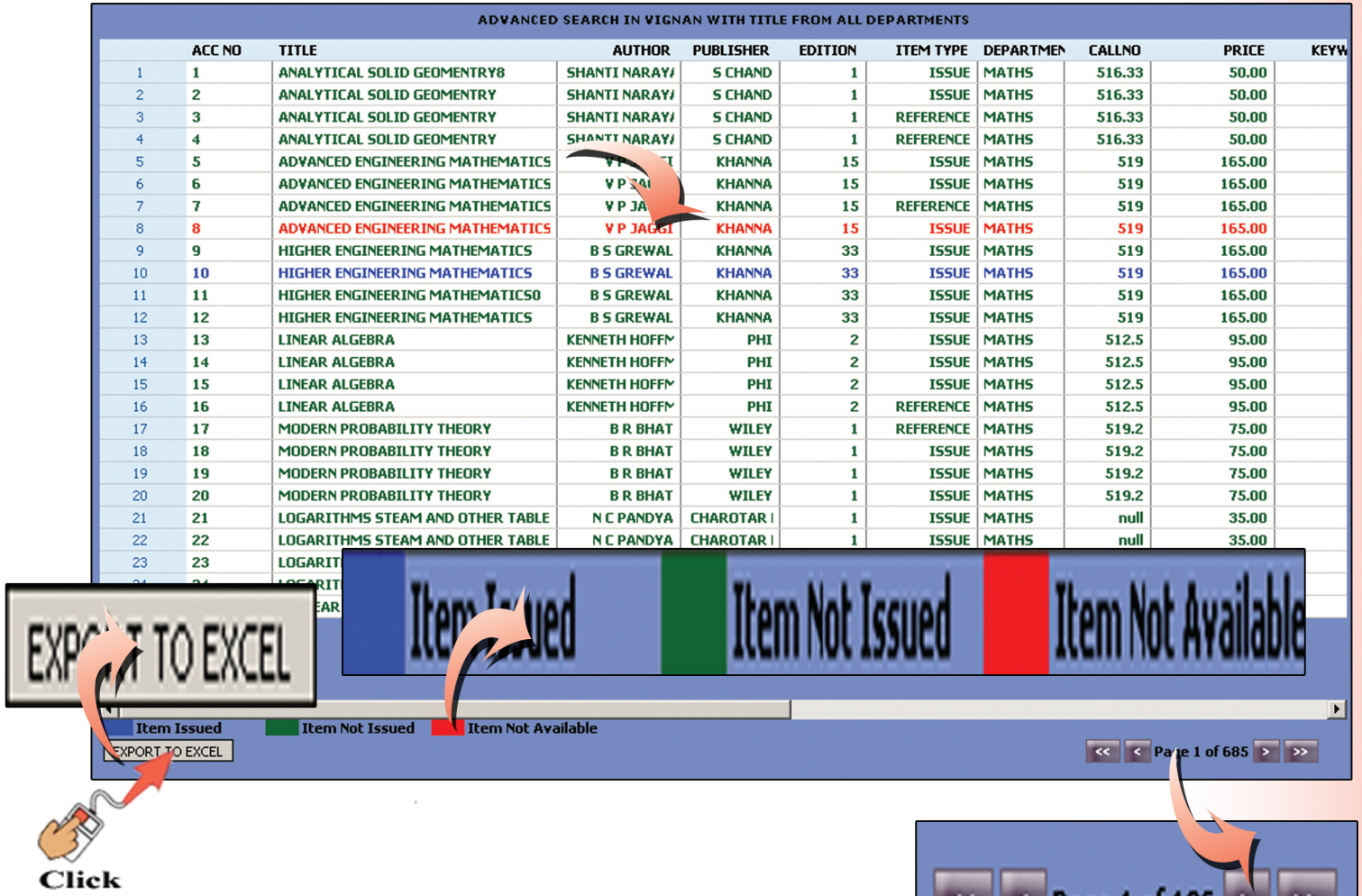


1. Click ***OPAC*** and select ***Advanced Search***

2. ***Select Category to search for the Catalogue item***

3. Select the **Department , Item Type** and enter the **Title, Author , Publisher** etc. and click **Search**

Next Step



4 *Search results for the Catalogue will be displayed*

5 *On the Right Side bottom no of pages will be displayed and a navigator to navigate through the pages*

6 **On the Left side bottomthere is Export to Excel button by clicking we can export all search result to excel**

End Task

PART 9

Report Generation

ezLIB provides Report Generation feature that is meant to view reports about the items in the library. This feature is available for Admin, DEO and IIC.

The services are classified into

Daily Reports
Book Statistics
Department Expenditures
Department Volume lists
Department Libraries
Details of Items by Date
Custom Reports
View Account Holders
Magazine Subscribed

The above services will be explained in detail in this part.

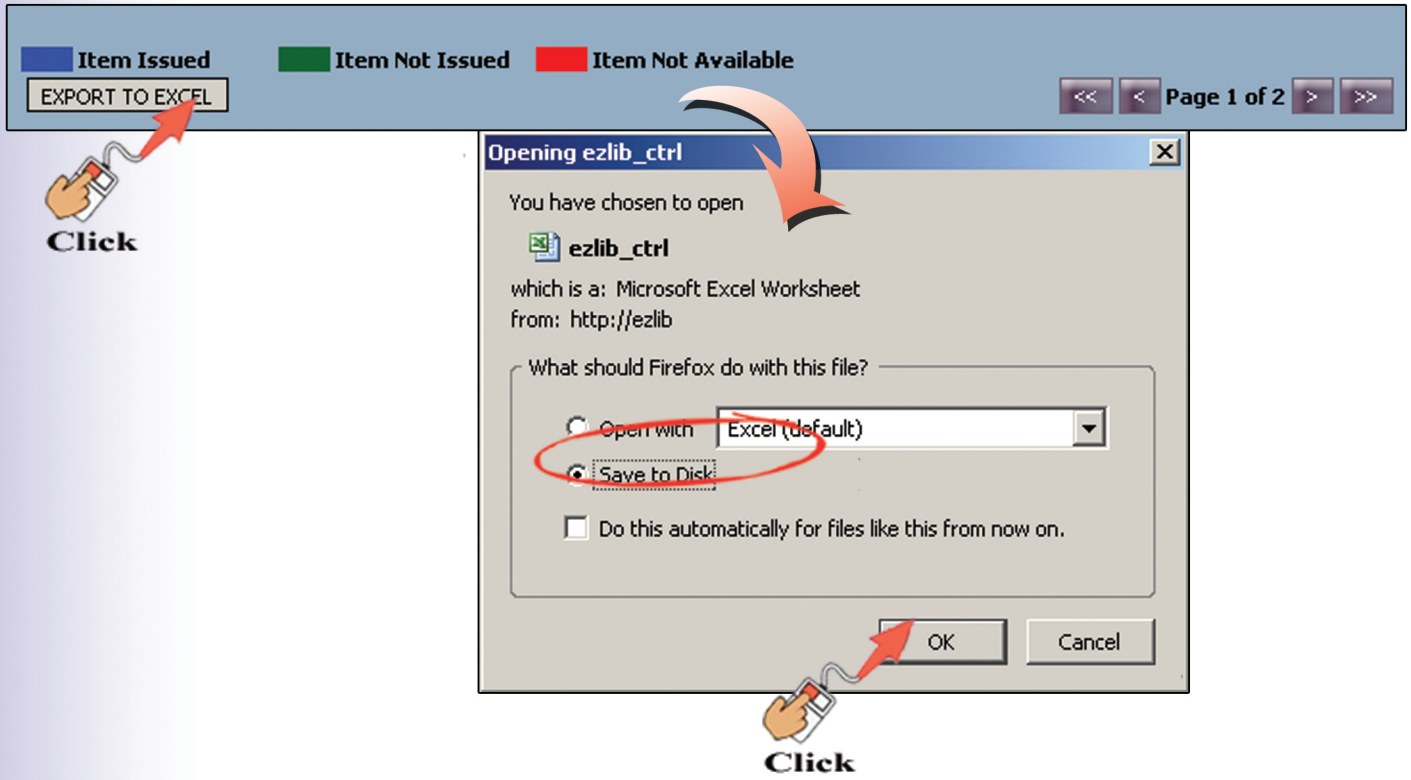
Tasks

Task#		Page#
1	Export To Excel	9.3
2	Book Statistics	9.5
3	Department Expenditures	9.6
4.	Daily Reports	9.7
5	Department Volume Lists	9.8
6	Department Libraries	9.9
7	Details of Items by Date	9.10
8	Custom Reports	9.11
9	View Account Holders	9.13
10	Magazines Subscribed	9.14

TASK 1 : EXPORT TO EXCEL

Start Here

Every Report has an export to excel which is meant for exporting the whole report obtained to Microsoft Excel format.



1. To Export the report to excel , click ***EXPORT TO EXCEL*** button.

2. Now a window opens asking whether to open or save the file, select ***Open with*** to open with excel or ***Save to Disk*** to save the file.

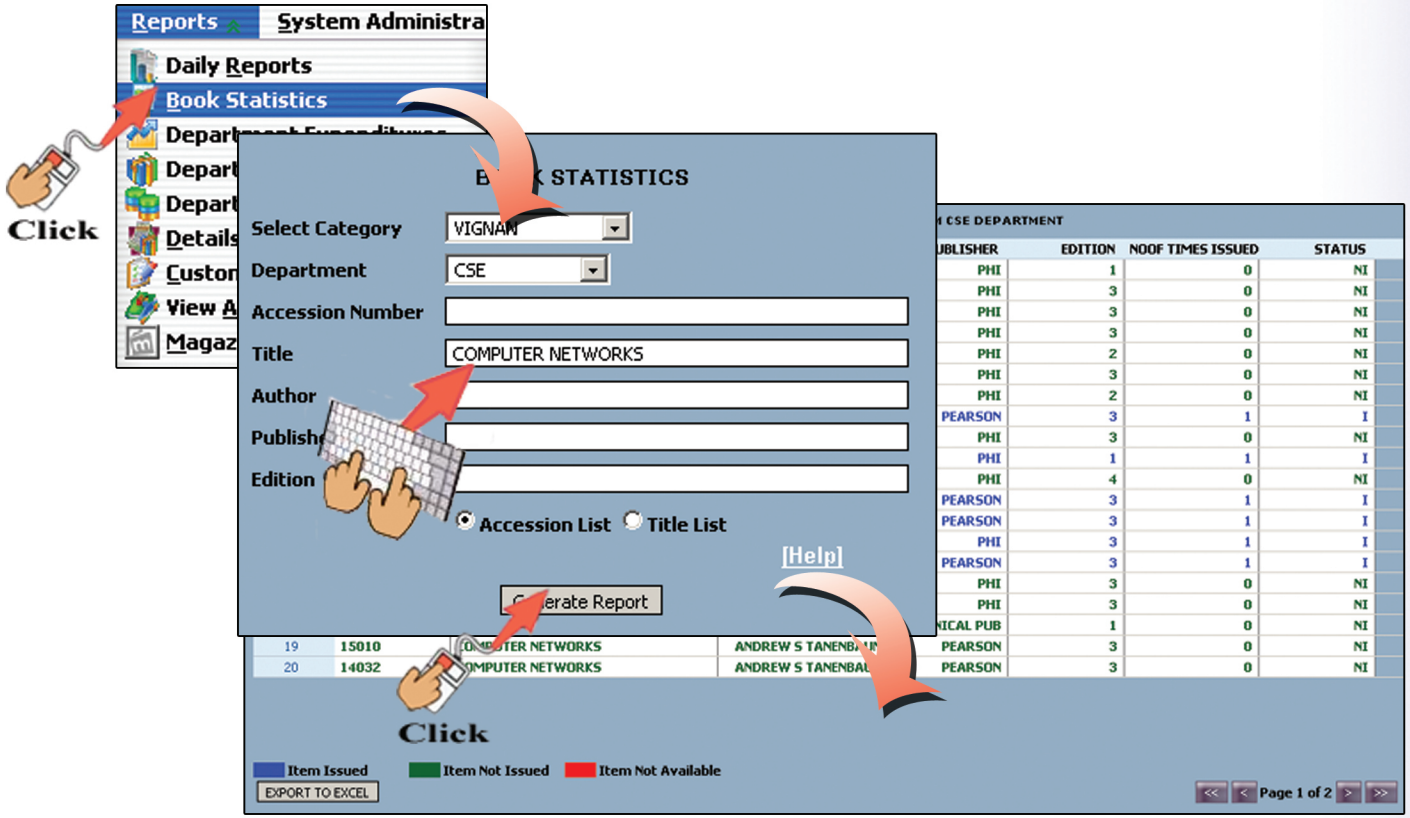
3. Click ***OK*** button to perform the selected operation or click ***CANCEL*** button to cancel the operation.

End Task

Task 2 : Book Statistics

Start Here

To view statistics of library items click ***Reports*** (Alt+R), ***Book Statistics(B)*** in main menu.



1. Select ***Category*** (is mandatory), ***Department***, enter ***Accession number*** or ***Title, Author, Publisher*** and ***edition*** which are optional, select whether ***Accession List*** or ***Title List***.

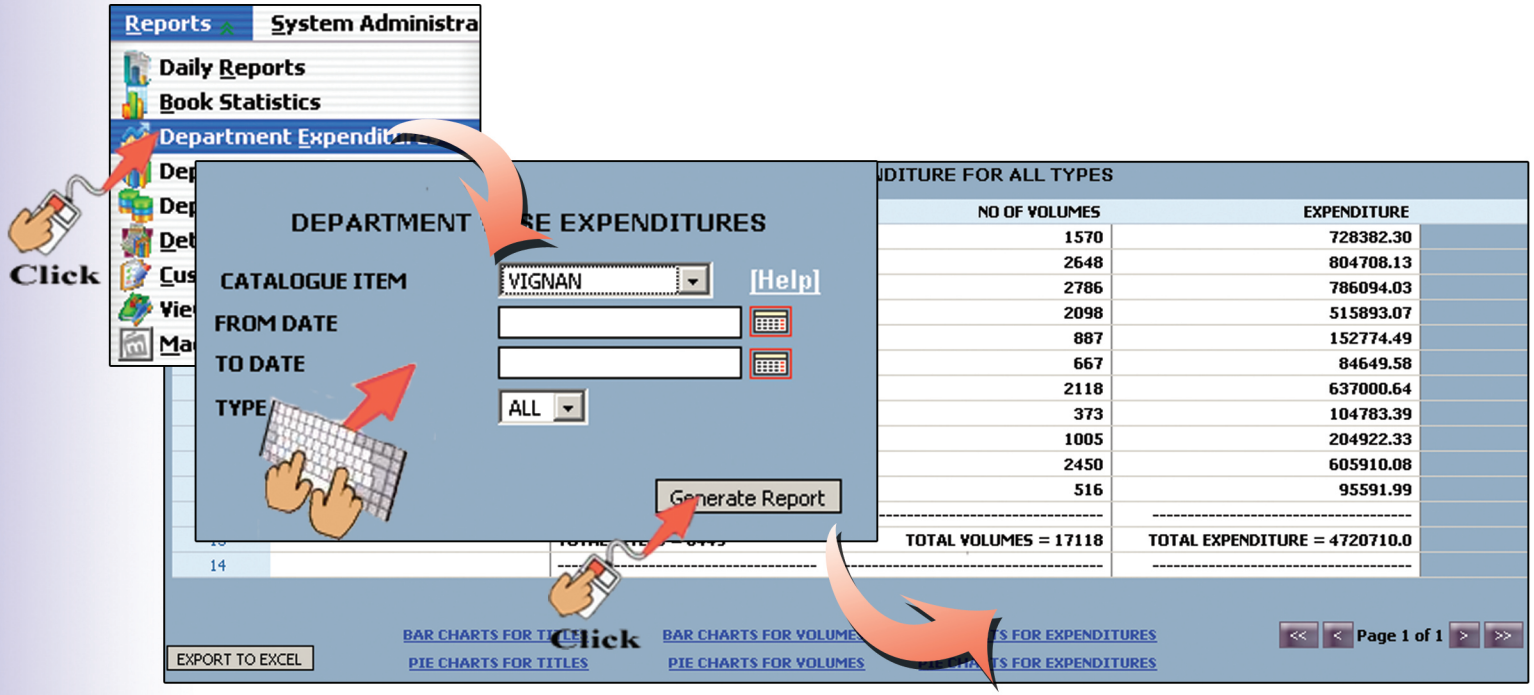
2. Click ***Generate Report*** Button to view the report in a seperate page.

End Task

TASK 3 : DEPARTMENT EXPENDITURES

Start Here

To view Department wise expenditures of library items click ***Reports*** (Alt+R), ***Department Expenditures(E)*** in main menu.

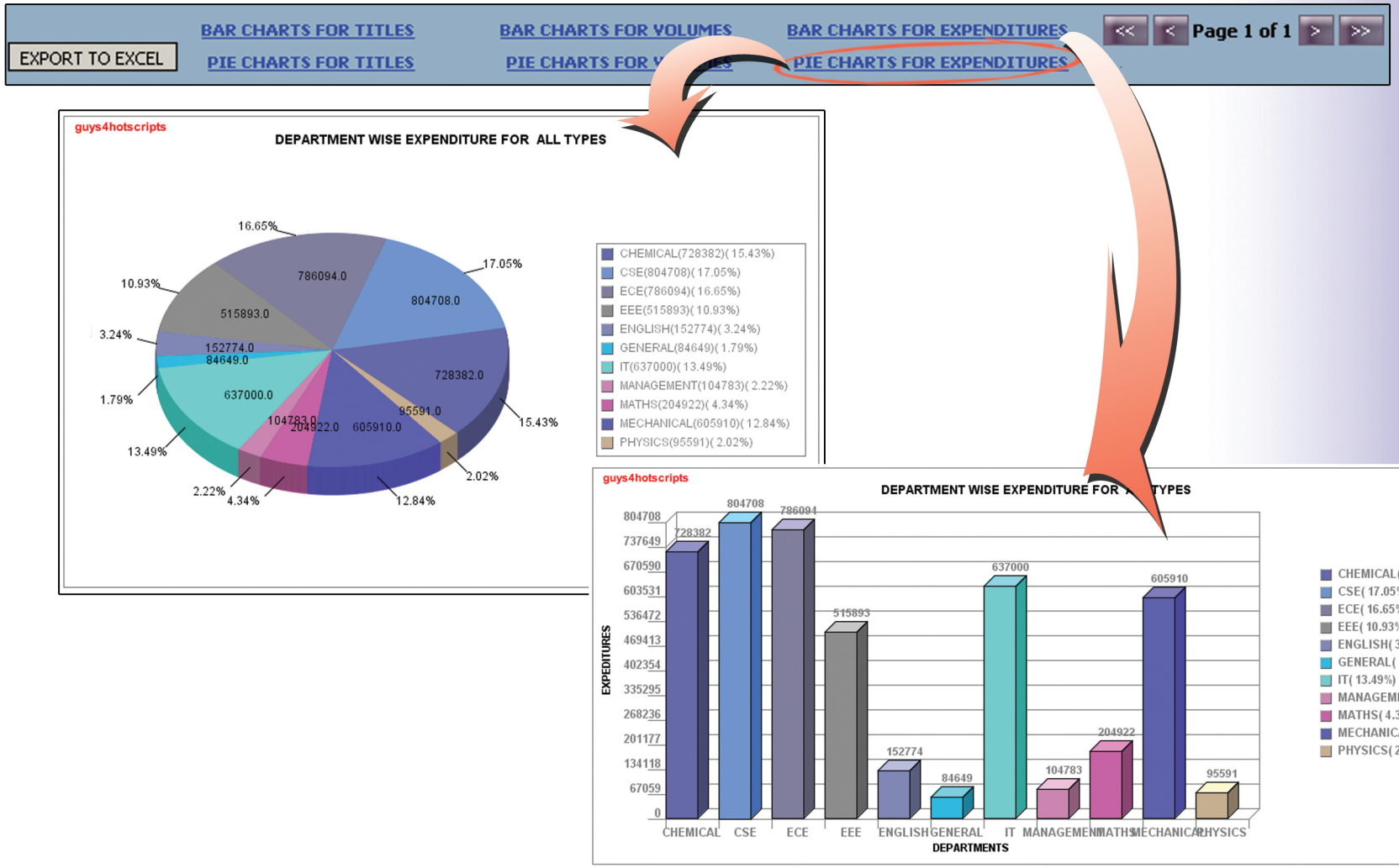


1. To view Department wise expenditures , first select ***CATALOGUE ITEM*** then enter the FROM DATE, TO DATE and select TYPE which is displayed in case if any types exists under that category.

2. Click ***Generate Report*** to view the report in a new page.

3. In the Report we have some anchors for pie charts and bar charts.

Next Step



4. Click on pie charts to view the charts, there are three different pie charts. They are pie charts for department wise titles, volumes and expenditures.

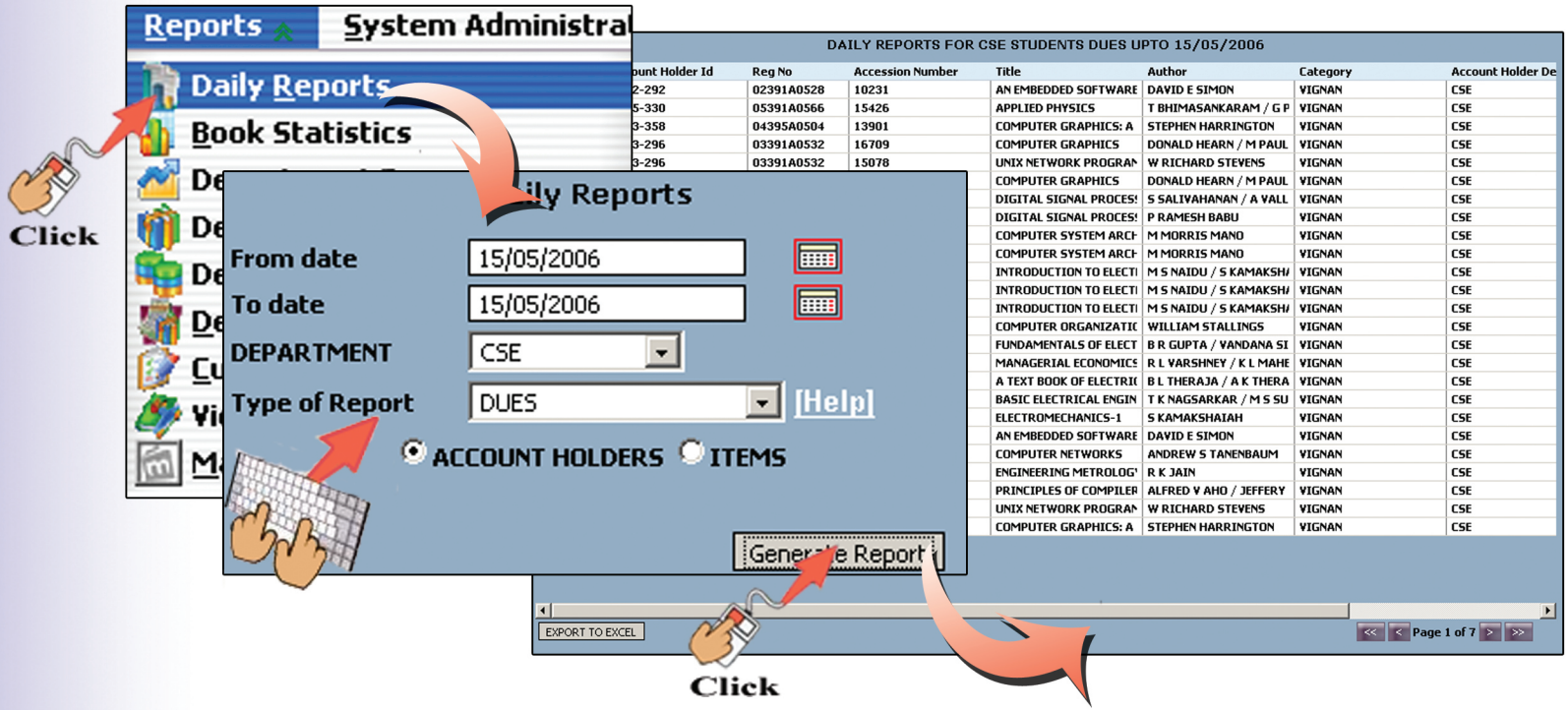
5. Click on bar charts to view the charts, there are three different bar charts. They are bar charts for department wise titles, volumes and expenditures.

End Task

TASK 4 : DAILY REPORTS

Start Here

To view Daily Reports of library items circlulation click ***Reports*** (Alt+R), ***Daily Reports(R)*** in main menu.



1. To view Daily Reports , enter ***From date*** and ***To date***. To Date is optional in case type of report is Todays Dues.

2. Select ***Department*** and then ***Type of Report*** (Dues, Issues, Returns etc.). Then select whether the department to be shown is ***ACCOUNT HOLDERS*** or ***ITEMS***.

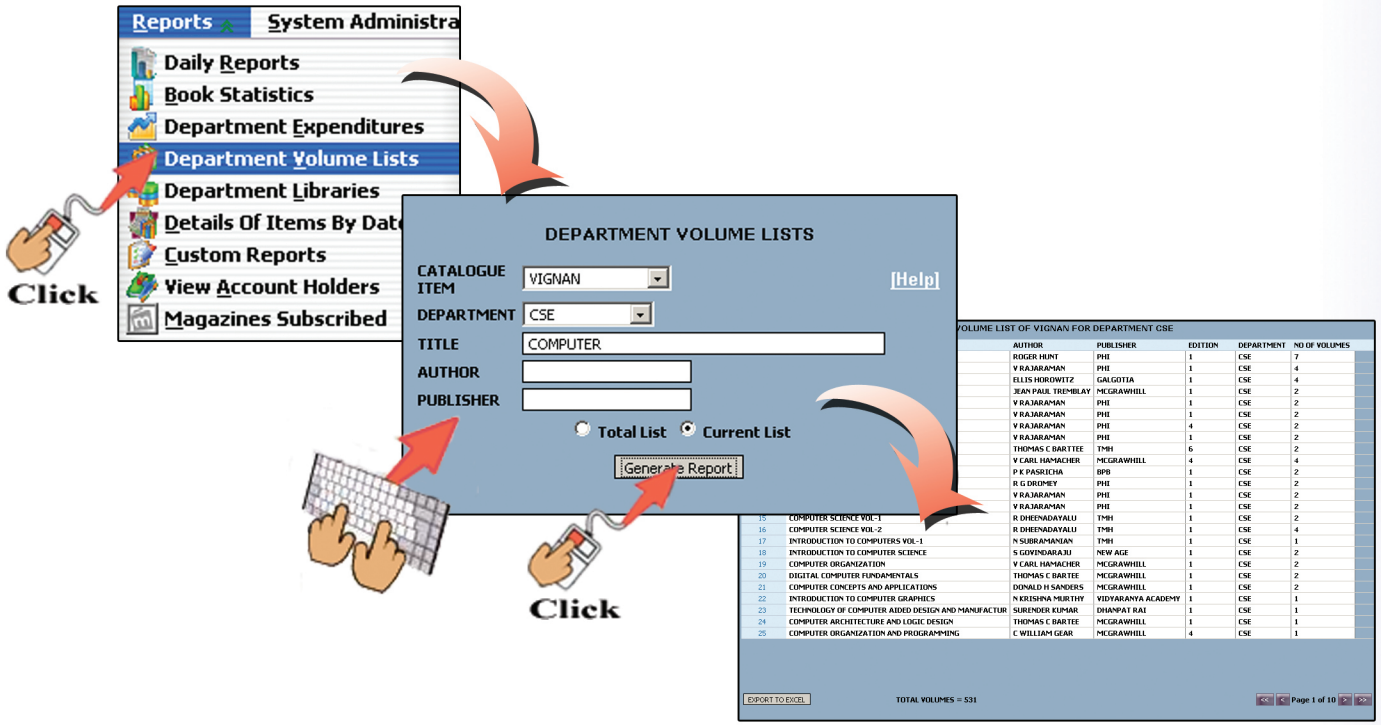
3. Click ***Generate Report*** to view the report.

End Task

Task 5 : Department Volume Lists

Start Here

To view department wise volume lists click ***Reports*** (Alt+R), ***Department Volume lists(V)*** in main menu.



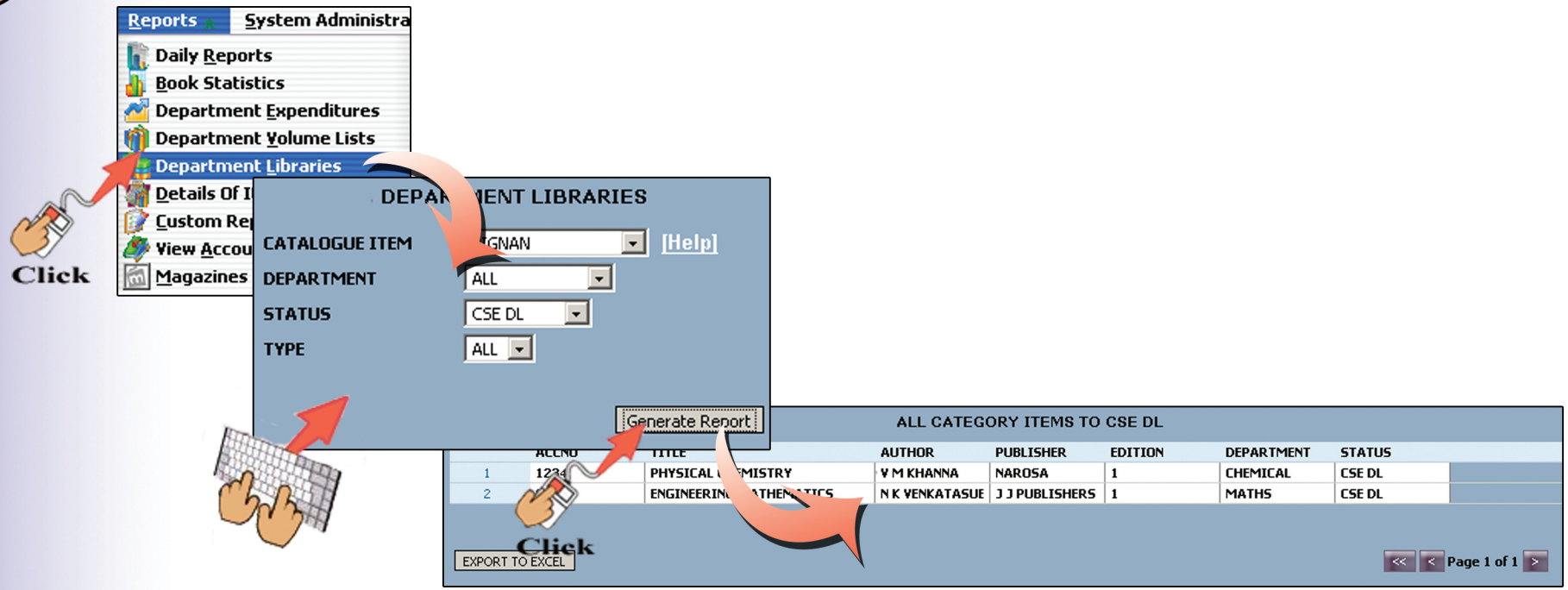
1. Select ***CATALOGUE ITEM*** (is mandatory), ***DEPARTMENT***, ***TITLE, AUTHOR, PUBLISHER*** which are optional, select whether ***Tota; List*** or ***Current List***.
2. Click ***Generate Report*** Button to view the report in a seperate page.

End Task

Task 6 : Department libraries

Start Here

To view Department Library lists click ***Reports*** (Alt+R), ***Department Libraries(L)*** in main menu.



1. To view Department Library lists , select ***CATALOGUE ITEM***, ***DEPARTMENT***, ***STATUS***, and ***TYPE*** in case any types exist for the catalogue item.

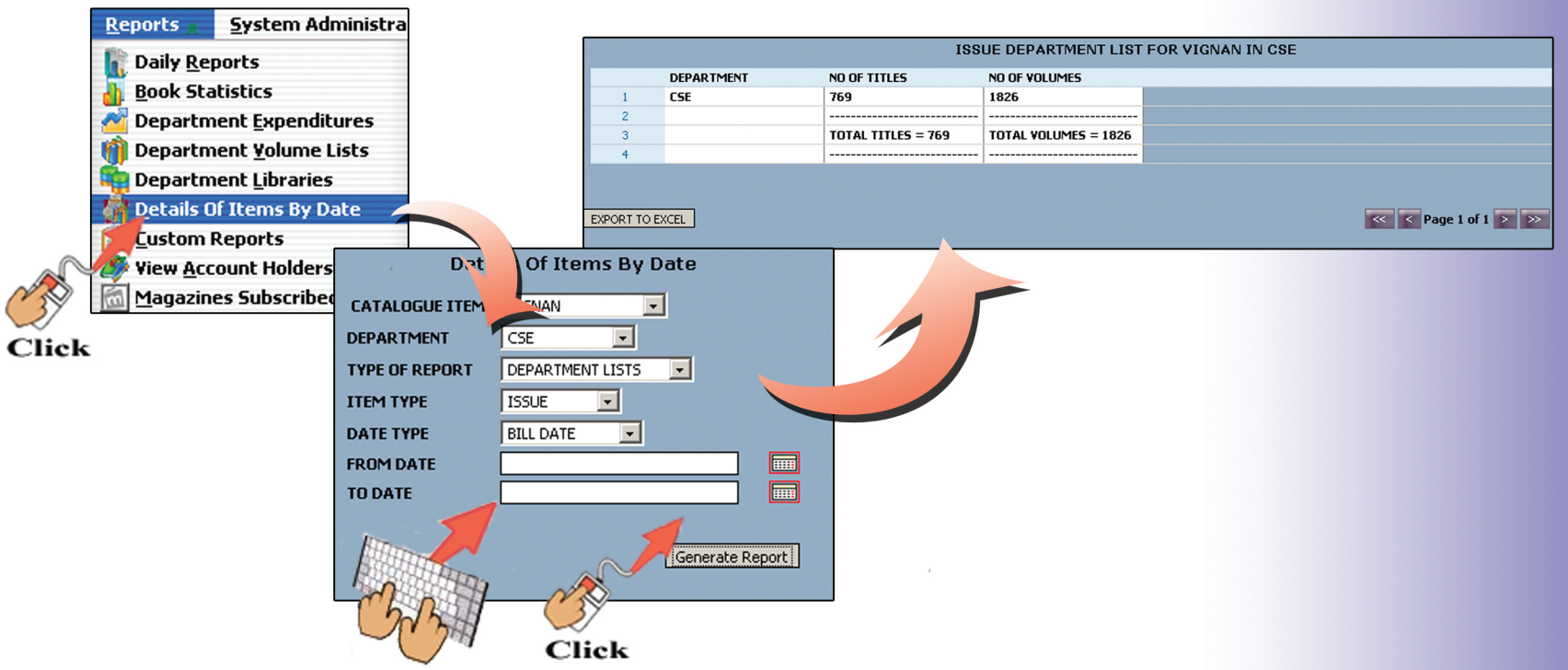
2. Click ***Generate Report*** to view the report.

End Task

Task 7 : Details of Items by Date

Start Here

To view details of library items by date click ***Reports*** (Alt+R), ***Details of Items By Date(D)*** in main menu.



1. Select ***CATALOGUE ITEM*** (is mandatory), ***DEPARTMENT***, ***TYPE OF REPORT*** (department lists, volume lists etc.), ***AITEM TYPE*** (issue, staff etc).

2. Select ***DATE TYPE*** (enter date or bill date) and enter ***FROM DATE*** and ***TO DATE***.

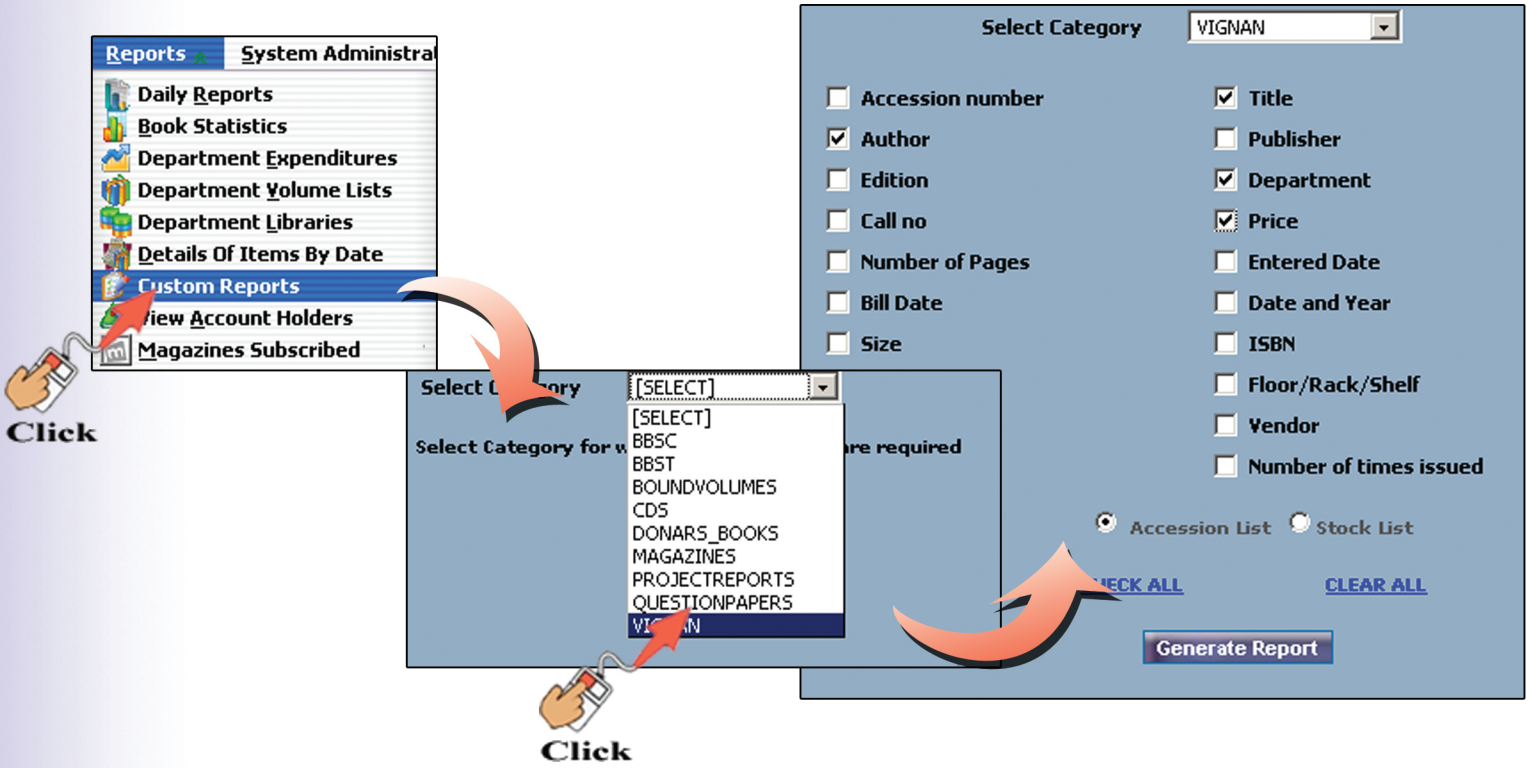
3. Click ***Generate Report*** Button to view the report in a seperate page.

End Task

TASK 8 : CUSTOM REPORTS

Start Here

To view custom reports of the catalogue items click ***Reports*** (Alt+R), ***Custom Reports(C)*** in main menu.

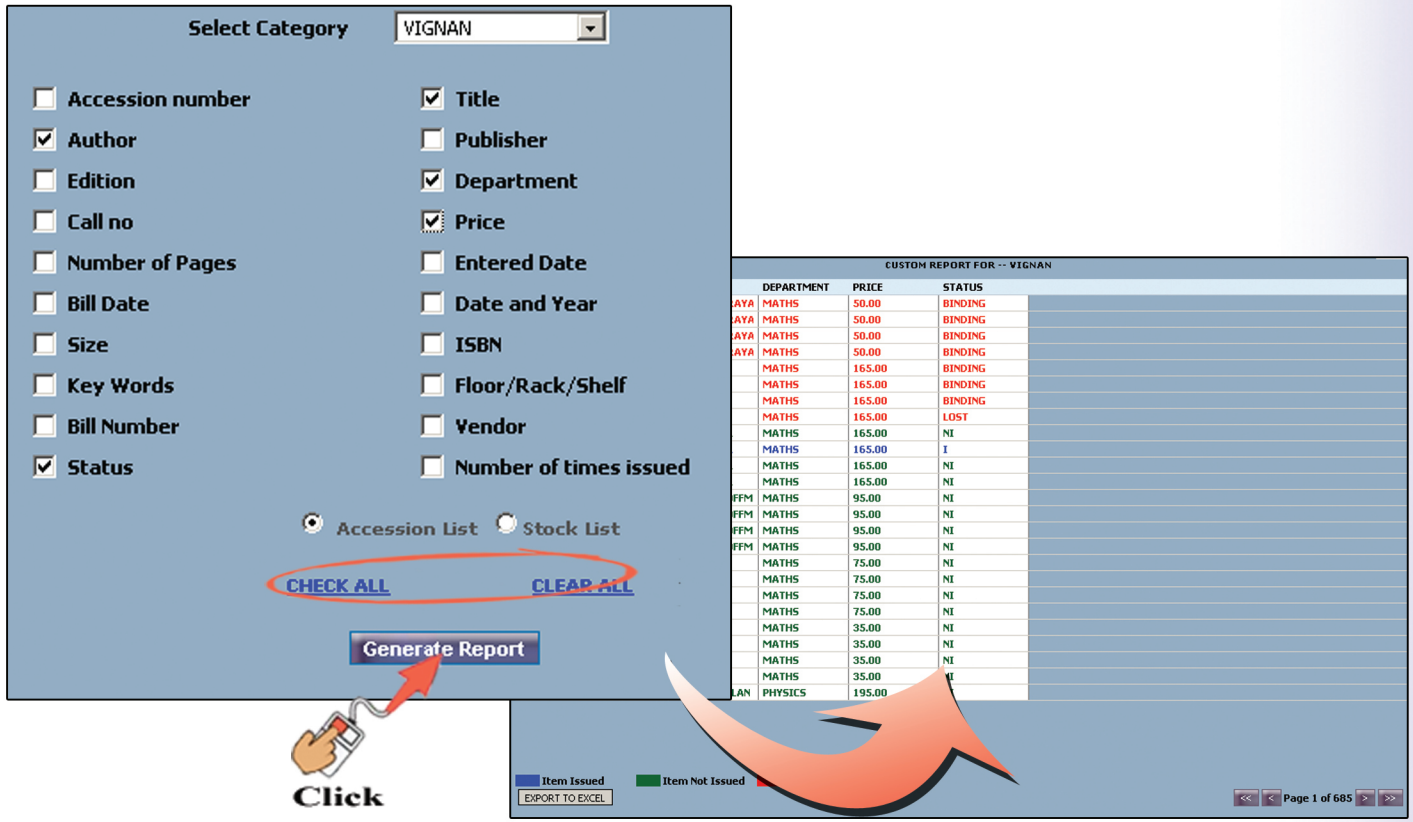


1. To view custom reports for catalogue items , first select ***CATAGORY.***

2. Now we get all the fields available in that category.

3. Select the required field and whether the list is ***Accession List*** or ***Stock LIst***

Next Step



4 Click ***CHECK ALL*** select all the fields and ***CLEAR ALL*** to clear all the fields.

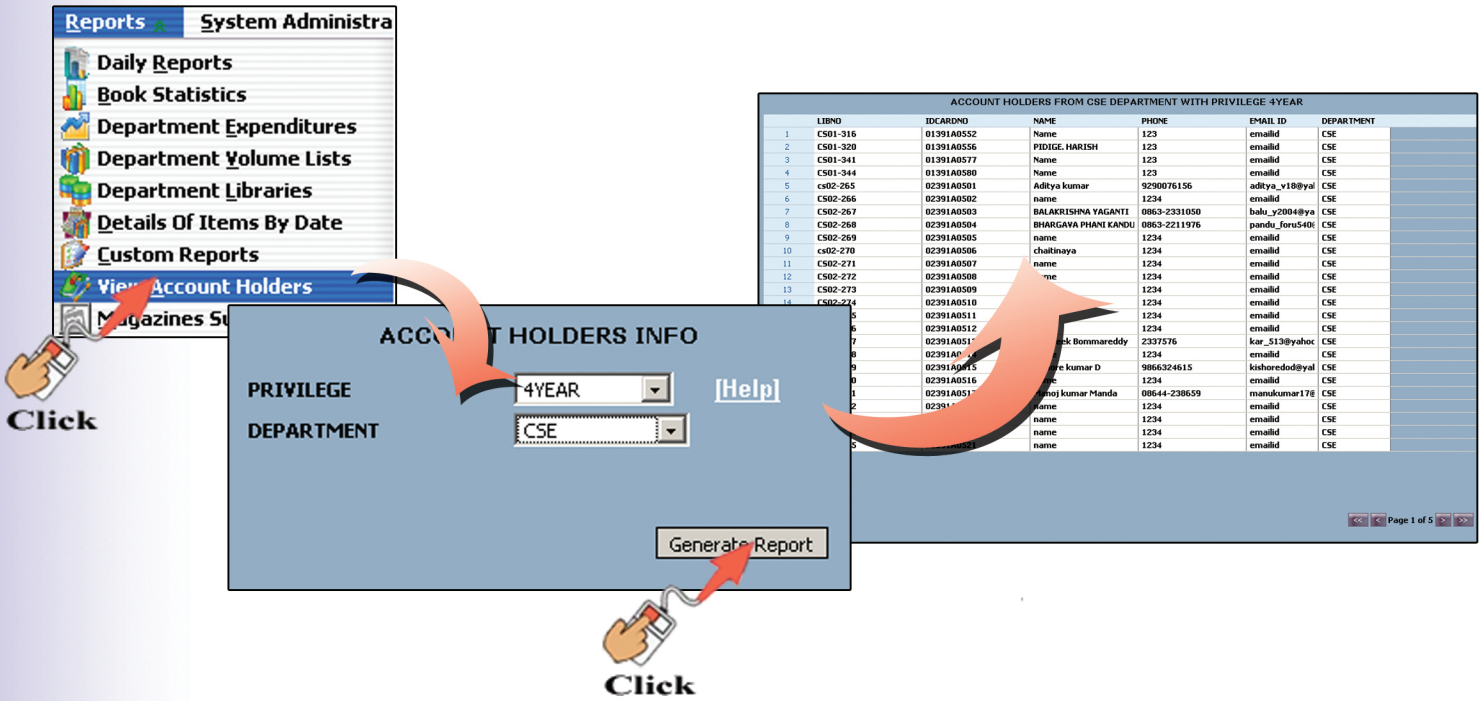
5 click ***Generate Report*** to view the report.

End Task

TASK 9 : VIEW ACCOUNT HOLDERS

Start Here

To view details of account holders click ***Reports*** (Alt+R), ***View Account Holders(A)*** in main menu.



1. Select ***PRIVILEGE*** and ***DEPARTMENT.***

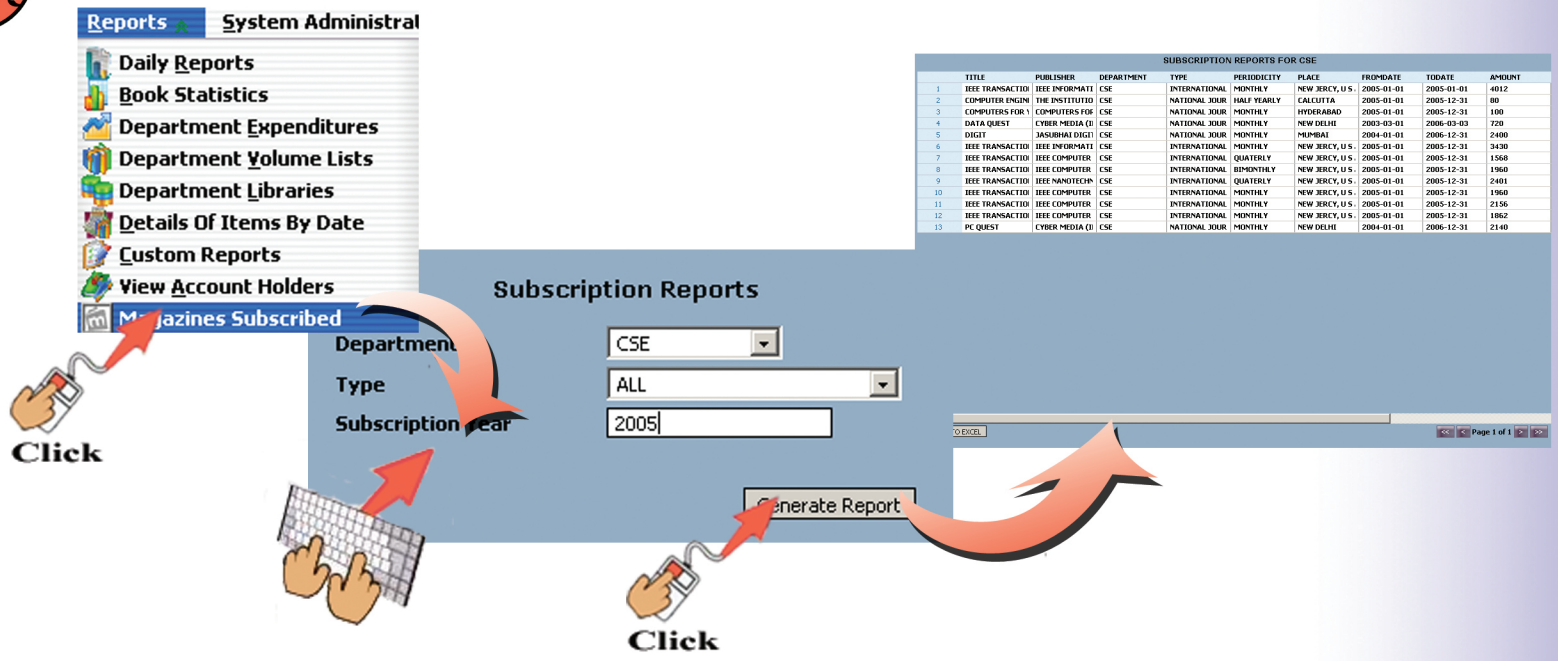
2. Click ***Generate Report*** Button to view the report in a seperate page.

End Task

TASK 10 : MAGAZINES SUBSCRIBED

Start Here

To Magazines subscribed click ***Reports*** (Alt+R), ***Magazines Subscribes(M)*** in main menu.



1. To view magazines subscribed , select ***DEPARTMENT***, ***TYPE*** (magazines, National journals etc) and ***YEAR***.

2. Click ***Generate Report*** to view the report.

End Task

PART 10

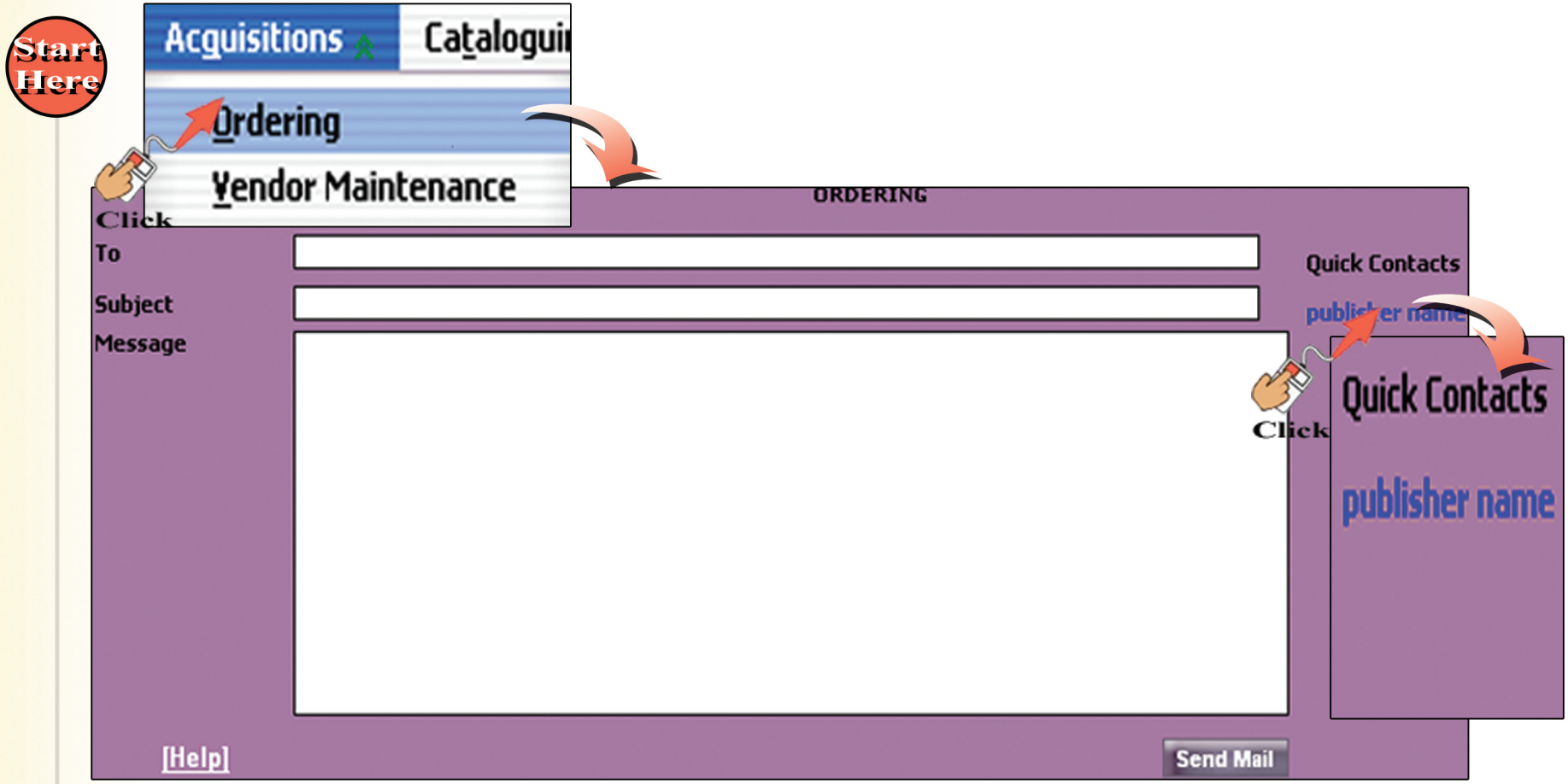
Acquisitions

The purpose of this module is to facilitate the Administrator to order books through mail to the existing and non existing vendors and also to add vendor details.

Tasks

Task#		Page#
1	Ordering	10.3
2	Vendor Maintenance	10.4

Task 1 : Ordering



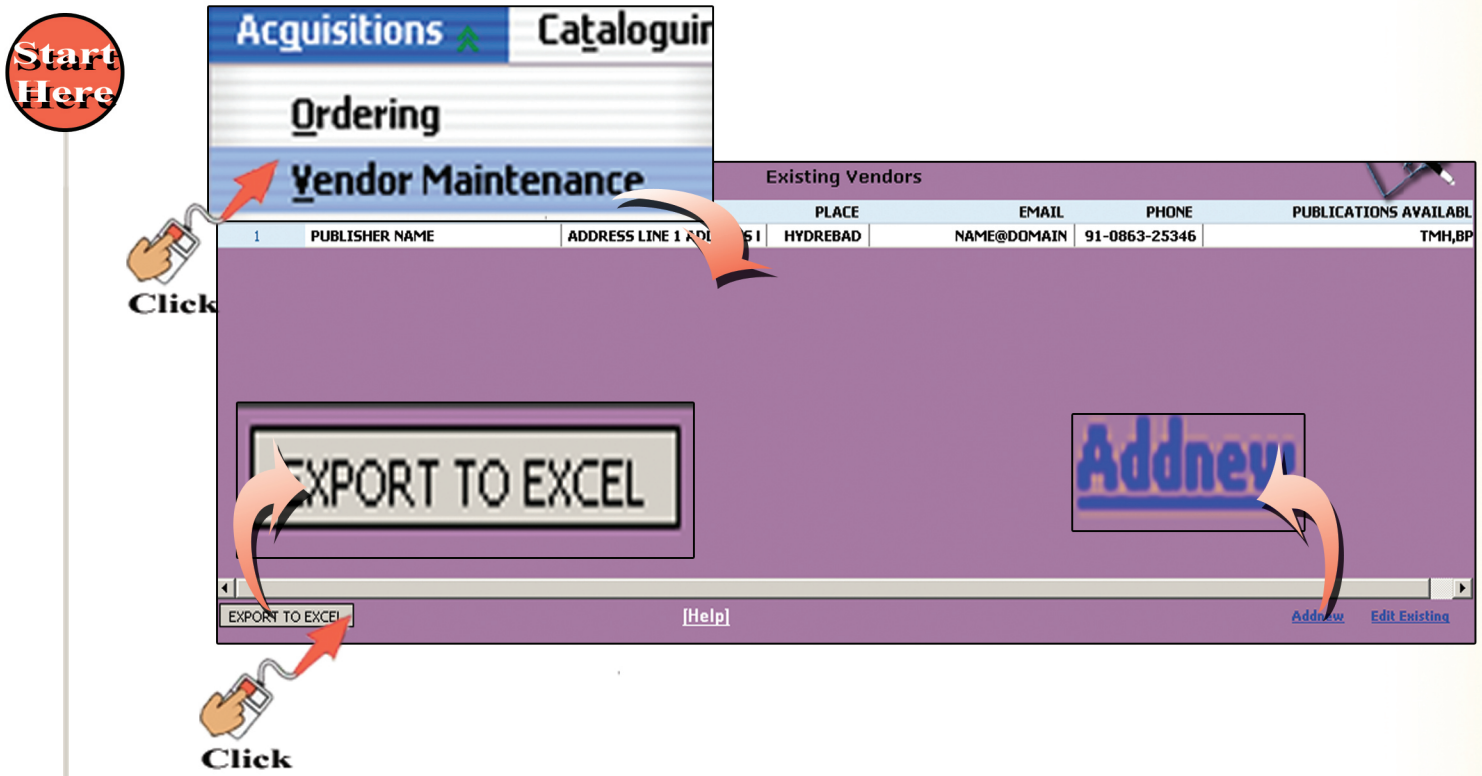
1. Click ***Acquisitions*** and select ***Ordering***

2. Enter ***To*** *mail address or you can select from* ***Quick Contacts***

3. Enter the Subject and Message and click **Send Mail**

End Task

Task II : Vendor Maintenance

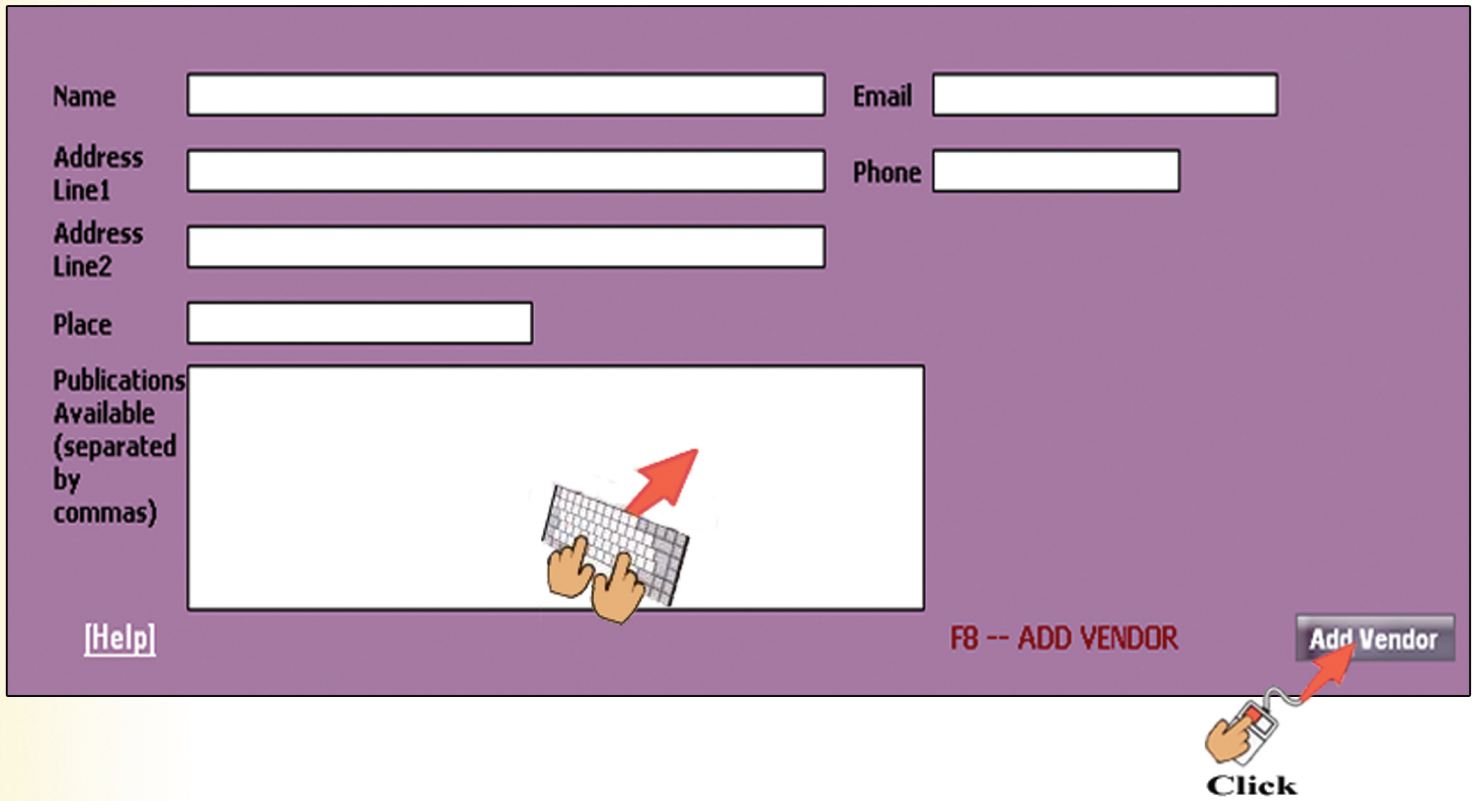


1. Click ***Acquisitions*** and select ***VendorMaintenance***

2. ***All existing vendors willl be displayed you can click Export ToExcel to export the data to Excel***

3. Click the **Add New** to add new vendor

Next Step



4. ***Enter all the Details required***

5. ***After entering the details Click on Add Vendor or press F8***

6. **For Editing the all ready existing vendors also follow the same steps**