e-Granthalaya

A Digital Agenda for Library Automation and Networking

Ver.4.0 (2015)

(Enterprise Edition)

User Manual

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Amendment Log

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Modules

1. DATABASE ADMINISTRATOR (Owner of Database) – Accessible to NIC Only

a. Create Administrator Account
b. Login the Application using above account
c. Create Member Library Account
d. Create Librarian / Library Administrator Account (Super User Account)
e. Create Library Cluster
f. Edit Profile (Database Administrator profile)
g. Database Backup
h. Manage Database Logs

2. LIBRARY ADMINISTRATOR (Super User) - Librarian

a. Update his/her Profile
b. Update Library Profile/setting
c. Manage Library User Accounts
d. Manage System Data
e. Data Entry Formats
f. Manage Library Team
g. Manage Notice Board
h. Photo Gallery Manager
i. Receipt Manager
j. Export Records
k. Covert Your Labels in Your Language
l. Access Users Log
m. View Users Feedback

3. MASTER DATA

a. Update User Profile
b. Manage Library Committee
c. Manage Library Committee Members
d. Holiday Calendar
e. Publishers Director
f. Vendors Directory
g. Library Sections
h. Subject Directory
i. Letter Template

4. BOOKS ACQUISITION (Purchasing Module)

a. Add New Title
b. Manage Approvals
c. Manage Orders
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b. Change Copy Status
c. Stock Verification
d. Generate Bar Code Labels
e. E-Resource Manager
f. Update Holdings

6. CIRCULATION

a. Members Management
b. Issue / Return of documents
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d. Manage Member Payments
e. Import Members Data from EXCEL

7. SERIALS

a. Add New Serials
b. Manage Approvals
c. Manage Orders
d. Manage Subscription
e. Manage Schedules
f. Receive Loose Issues
g. Generate Reminders
h. Manage Bound Volumes of Serials

8. MICRO DOCUMENTS

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b. News Clipping Manager

9. BUDGETS

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- **NOTE: Existing Collection of Books and Monographs must be entered using 'Retro-Conversion' form under CATALOGUING Module.**

  NOTE: Every TITLE must be entered as a Single/master Record in Catalog Table. This master record of TITLE will be used by all libraries in the same cluster to add their holdings/copies in HOLDING Table along with separate Purchasing record. For example, a Title – ENCYCLOPEDIA OF BIOLOGY –in 10 Volumes, may be available in many libraries of the same cluster. Here a SINGLE CATALOG Record will be created (by First Library) in CATALOGING part and every library will add their HOLDINGS/COPIES with VOL NO / multi-copies. Other libraries should not create CATALOG RECORD again of the same title.

Chapter 1
Introduction

1.1. History of e-Granthalaya

e-Granthalaya: A Digital Agenda for Library Automation and Networking – is a Web-Based Integrated Library Management Software developed in **National Informatics Centre (NIC),** Department of Electronics and Information Technology, Ministry of Communications and Information Technology, Government of India. The software has been developed by a team of experts from Library Science, Systems and Architecture, Database Technology and Software Engineering discipline. The current version of the software is Version 4.0 – web based, Enterprise Edition with a centralized database option for many libraries under one organization.

Following Tables shows the releases of versions of the software:

S.N.	Ver	Released By	Year	Technology Used	DBMS
1.	1.0	NIC, Bengaluru	2003	VB6/Desktop Based Application/Client -Server Mode (Public Library Edition)	MS ACCESS/MS SQL Server 7
2.	2.0	NIC HQ, New Delhi	2005	Vb6/Desktop Based Application/Client-Server Mode (Government Library Edition)	MS SQL Server 2000
3.	3.0	NIC HQ, New Delhi	2007	VB.NET 2.0 Desktop based Application / Web-Based OPAC in ASP.NET 2.0 (Network Edition)	MS SQL Server 2005
4.	4.0	NIC HQ, New Delhi	2015	ASP.NET 4.0 / Web-Based Application / Enterprise Edition with Centralized Database for all libraries of one organizations. Available in NIC Clouds also.	PostgreSQL 9.4

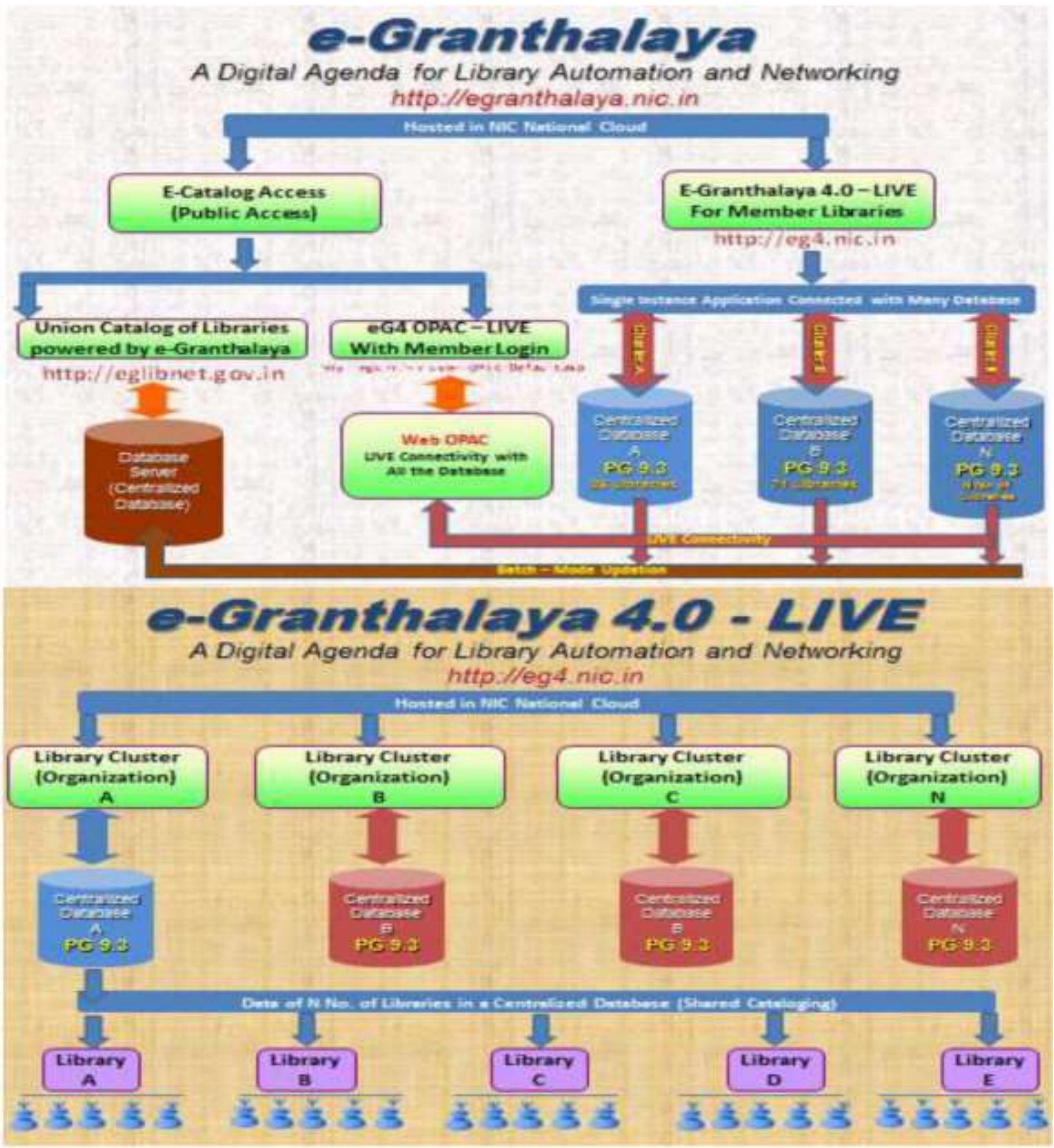
1.2. Technology, Architecture and Library Standards

e-Granthalaya has been developed using Microsoft .NET Technology i.e. ASP.NET 4.0 with various functions and features developed using open-source tools and technology such as AJAX / JQUERY/ LINQ /Silverlight/Z39.50/SRW/SRU, etc. The current version of e-Granthalaya (4.0) is a web-based application installed in web server and uses **MS SQL Server** as well as **PostgreSQL** – an Open Source Database Management System.

e-Granthalaya 4.0 architecture is based on the requirements of Indian libraries where a centralized database can be used by n number of libraries / branch libraries across the country under one organization. The application may be installed in a windows web-server, runs on Internet Information Server (IIS) along with a database which may be reside in the same web server or in a separate Database Server Pc. Software runs on Windows platform only and can be installed in Stand-Alone PC or in a web-based environment with Internet/Intranet access. It supports Windows 7 /8 /server

2008/R2/20102 or higher. As the software is web-based therefore, no need to install it in each PCs in the Library, instead, it must be installed in one PC which can be accessed over LAN/Internet/Intranet. Online Public Access Catalog (OPAC) is also not required to install separately, rather, it is integrated with the main application which is used for data entry. eG4 will be provided with a compiled program and thus, source codes will not be provided to the users.

e-Granthalaya 4.0 is well integrated with email/SMS/smart card/RFID technology and support various international standards prevalent in libraries such as Z39.50, AACR2, UNICODE, MARC/MARCXML/ISO:2709 exchange formats. Efforts will be made to provide mobile based apps for various services to the users.



eG4 Architecture

1.3. Distribution and Hosting Policy

Since 2003 to 2013 – the software were distributed to all kinds of libraries in the country at no cost – simply to get feedback/inputs from all types of libraries to make it a standard tool for library automation and networking. Since 2018 and onwards, Ver.4.0 of the software is being provided at Rs.21,275/= to the Government and Government funded organization Only and thus will not be supplied to Private funded organizations.

e-Granthalaya Ver.4.0 (eG4) is only available in NIC Data Centre/National Cloud for Ministries and Government Departments libraries, from both Central as well as State Governments, and other Government funded organizations / autonomous bodies. Indian Army / Indian Navy and other Para-military Organizations will host the application and database in their own Network which is generally INTRANET with their maintenance and support. Software will not be available in CD.

Government of Indian has setup an excellent hosting facility in NIC at three locations viz National Data Centre / National Cloud in Delhi, Pune and Kolkata. Besides, NIC is maintaining State Data Centre (SDC) in each state capitals which have been setup by the State Government. Hosting of the e-Granthalaya software is also available for Government libraries in NIC Data Centre / National Cloud as well as State Data Centre as per NIC Hosting policy. Besides, Ministry of Electronics and Information Technology, Government of India has also setup a National Cloud called as '***Meghraj'*** where hosting facility is available for all kinds of organization on payment basis (http://cloud.gov.in). The clouds provide the availability of Virtual Machines (VMs) as well as Co-Location of Server in the Data Centre on payment basis. Presently there is no charges for NIC Cloud.

1.4. Training and Support

NIC organizes 3-Days training program on e-Granthalaya software regularly in many of the users' Departments / in-service course of JNVs/KVs and sometimes in NIC Centre. Those users who are having training facility in their organizations and wish to organize training on e-Granthalaya Software, such users may invite us for resource person from NIC, TA/DA will be given by NIC/User Department/Organizer. Besides, efforts will be made to organize training programs in various ATIs and UGC sponsored departments.

1.5. E-Granthalaya Rolling Out Services in NIC

Following services of e-Granthalaya Software are empanelled in NIC for Government organizations which can be availed on payment basis where Order and payment has to be made directly to the empanelled agencies on the following rates::

- GO LIVE Service (Installation + One Month Technical Support)
- On-Site Training (5 days/ per physical site).
- Data Entry –Basic / Detailed Data Entry modes
- Data Migration
- Man-Power Deployment for Post Implementation Support (data entry operator / Asstt Librarian / Librarian).

1.6. What's New in the Version 4.0

- It is Web-Based Application.
- Available in NIC Clouds for Government Organizations as per NIC hosting Policy
- Cloud Ready Application with Multi-Tenancy, a single instance application will connect to many database, each database for a cluster of Libraries, every cluster with many libraries, every library with many users to operate/use the software.
- Centralized Database for N number of Libraries under one Organization
- Controlled by Database Administrator
- User will access/use the application online.
- Uses latest technology and Open-Source tools
- Uses **Postgresql** – an Open Source DBMS.
- User Customized Data Entry Formats
- Retro-Conversion and Full Cataloging merged in single form
- Acquisition Data optional with Retro-Conversion
- Manages cataloging for Non-Book Materials also.
- Manages cataloging for Legal Documents.
- E-Books manager built-in / e-Book Viewer for displaying pages in book flip style.
- Integrated with Barcode/email/sms/smart card/RFID
- Based on Library Stadards AACR2/MARC21/Z39.50/Shared Cataloging
- Resource Sharing among libraries

- New Look of forms and Grid
- Web-based Reports in PDF/DOC/HTML Format
- Auto-Accession Number generation and Accessioning of many documents automatically with single click
- Document – wise varying rates of Fine in circulation module
- Document categories with varying due-days, different rates for cluster of days.
- Holiday calendar built-in
- Book Bank Facility for long term issue.
- New look of OPAC and OPAC is integrated with main application, no need of installing OPAC separately.
- Online Reservation / request of books
- Password managed by Members themselves
- Transfer of members (students) to new class automatically with single click by selecting all the students of one class.

Chapter 2
General Considerations

2.1. System Date Setup

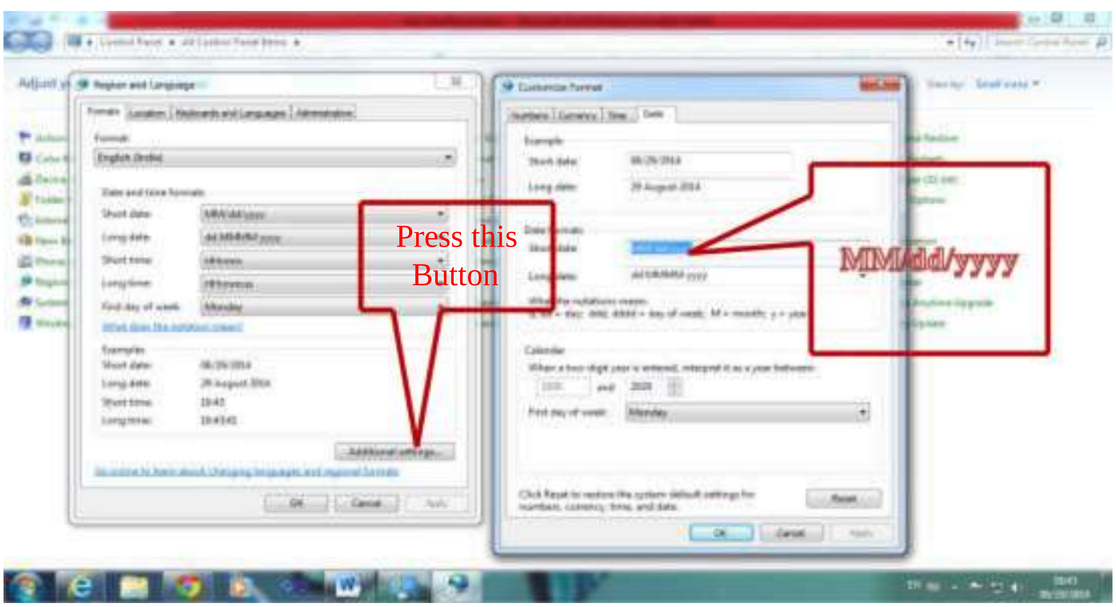
Short Date Format of the System (Server PC as well as Client PCs) must be set to US Date Format i.e "**MM/dd/yyyy**" while date separator must be set to "/" only.

However, you will enter the date during data entry in e-Granthalaya Software in "dd/MM/yyyy" style , e.g. 27/02/2010. Date must be entered in 8 digits plus 2 digits for '/' date separator. For example, in case there is first January then you need to enter day as 01 and Month as 01 for January, and year must be entered in 4 digits (01/01/2015).

How to setup date format

1. Go to **START** >> **Settings** >> **Control Panel**
2. In Win 7 / 8/Win Server 2008/2012 – under Control Panel >> Region and Languages >> Press **Additional Settings** Button.
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" or other formats.

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.



<u>NOTE</u>: 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.

2.2. Meaning of Action Buttons

DELETE: To delete the selected record(s) **SAVE:** To Save the new record

UPDATE: To save the changes after edit of selected Record **CANCEL:** To cancel the current event

OK: To go for further option **SEARCH:** To search the existing record(s) **PRINT/REPORT:** To generate the Report

ADD COPY: To Add New Copy in selected Catalog Record. **ISSUE :** To Issue the displayed Document

RESERVE: To Reserve displayed Document **RETURN:** To Return displayed Document

2.3. Type of Fields

Mandatory Fields **:** Shown with * sign

Optional Fields **:** Users can leave such fields blank if no data exists

CODE : This field is mandatory, requires alpha-numeric value, must be unique. Wherever International Standards/Codification is there – must be used.

<u>CAT NO</u> **:** 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 an Accession Number. The fields which are not enabled / write protected, users are advised not to try to add any value in such fields.

2.4. Automatic Filled Fields

The following values are saved "Automatically" in the database fields while saving / updating the records.

USER CODE:	The USER CODE of Logon User
DATE ADDED:	Current Date of the System
DATE MODIFIED:	Current Date of the System
LIB_CODE	Current Login Library Code

2.5. 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 and works as per the program status, therefore, user should not worry about the controls.

2.6. Browser / Screen Resolution

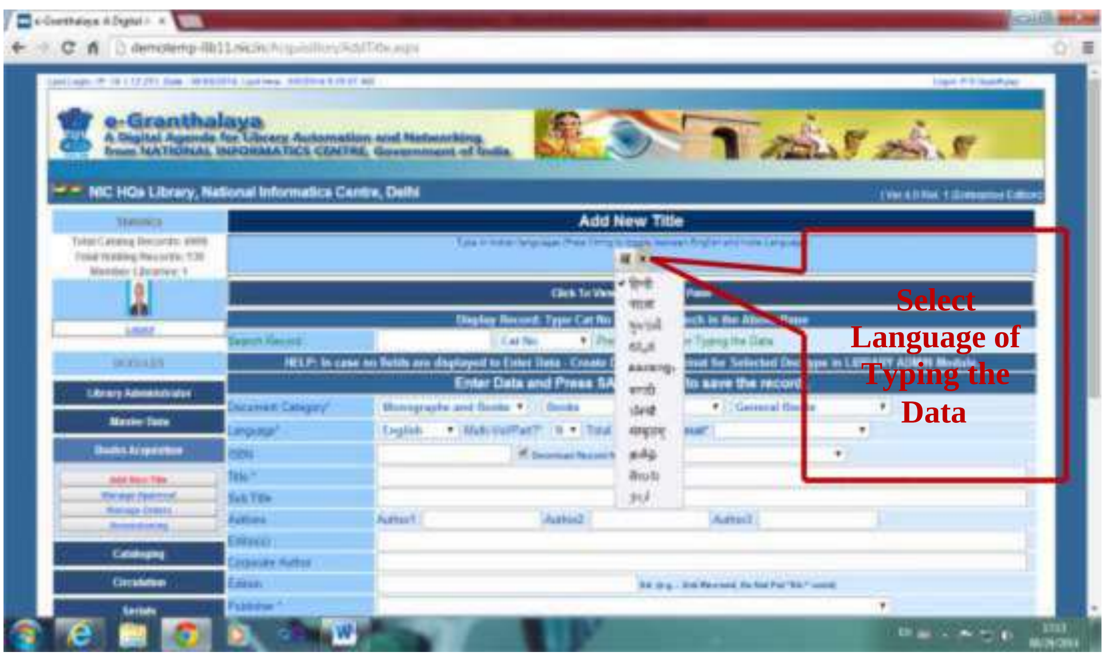
The software can be run in any Internet Browser, and the best viewed with the screen resolution 1280x720. You can control screen resolution of the browser as well of your PC screen resolution.

2.7. How to Enable Local Language for Data Entry in e-G4

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

2. **Win 7 and later OS comes with pre-loaded** "***Language Pack***" and thus, no need to install it separately

3. E-Granthalaya 4.0, if runs on the PC with net connectivity, is having a built-in tool to use any Indian Language by just selecting from 'Drop-Down'. This drop-down is visible on the top part of each web form of eG4 as given in below screen.

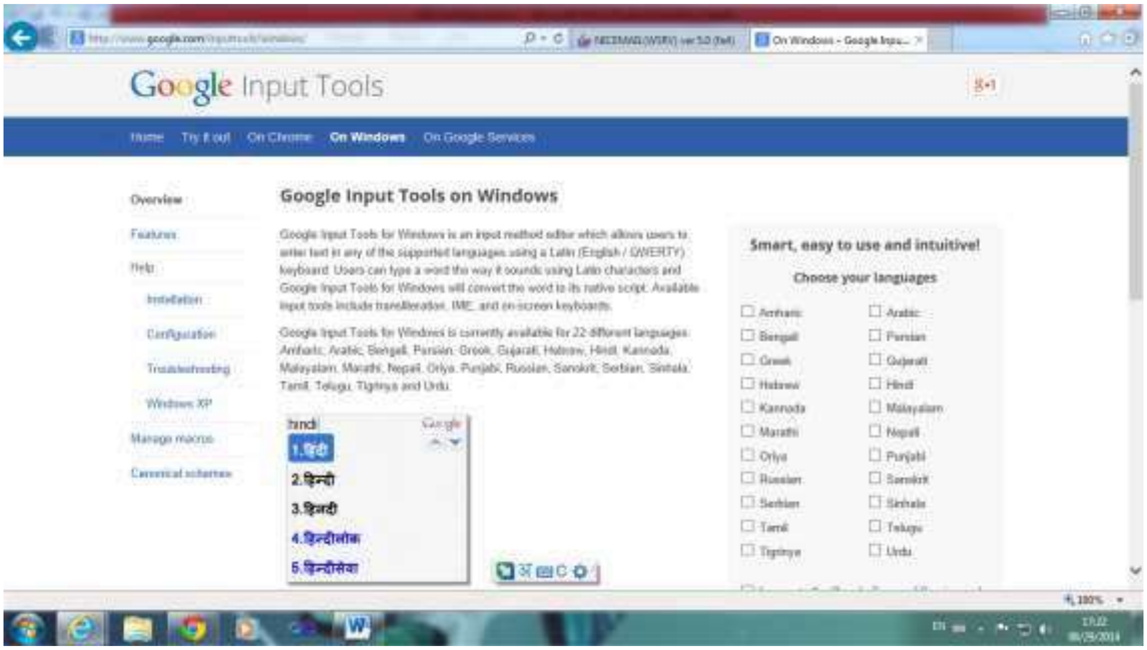


4. For selecting desired language either you can select it from language drop-down available on each form and press "Control g" to activate the selected language. The Language Drop-Down will not available if Net connectivity is not available in the PC.

5. Besides, you can use other tools for typing in local language which you need to install any UNICODE compliant software in your PC.

6. Google provides such tool called as '**Google Transliteration IME Tool'** available free and can be installed online from the following URL:

http://www.google.com/ime/transliteration/



<u>NOTE</u>: 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. Also you must read the instruction for the tool you wish to use.

<u>NOTE</u>: Besides, many free software are also available on net which can be installed and used for data entry in local language. These programs must be UNICODE compliant to work with eG4.

2.8. How to Display Logo and Background Image

In eG4, Logo and Header Image can be saved in database using the form – 'Update Library Profile' form under LIBRARY ADMINISTRATOR module. These images will be displayed on the header of the OPAC – you need to upload the image with a proper height and width to get fit in the area of OPAC header.

The Logo which u upload will be displayed on all the Reports and on Web OPAC Header. While uploading the Logo Image and Library Photo should be compressed one and smaller size in terms of bytes. The Size of these must be appropriate, not too bigger or smaller.

<u>NOTE</u>: After uploading of images, you must check how these images are displayed on Web OPAC Page and in Reports. In case, size is not appropriate then it may distort the look of the page.

2.9. Email Integration

e-Granthalaya 4.0 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.

eG4 uses SMTP (Simple Mail Transfer Protocol) Service of Windows Server which is already available in NIC Cloud and thus all the users will use this facility at no cost.

As eG4 is hosted in NIC Cloud where email integration is provided officially and mail can be sent without any configuration by user libraries.

2.10. 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 :-

0. On Laser Printer with A4 Sizes sheets with barcode labels pasted over the sheet
1. On BarCode Printer (Thermal Printer)

1. How to Integrate Laser Printer for Barcode Generation

As eG4 is hosted in NIC Cloud where these barcode fonts are already installed and thus no need to do anything by user libraries to generate barcode labels from their client PCs.

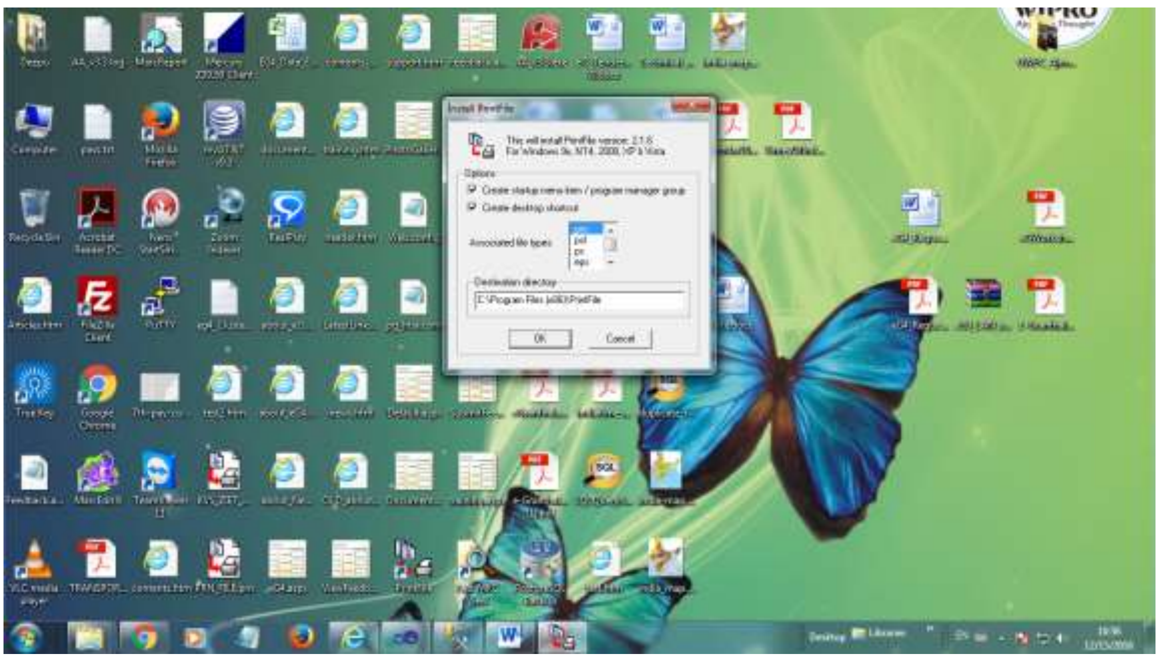
2. How to Integrate BarCode Printer with e-Granthalaya 4.0

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 designed/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 of bar tender software there is a check box 'PRINT TO THE FILE' option – check it and press PRINT button - it will generate the PRN file which you save in the drive and send us in the mail to integrate your printer with eG4.

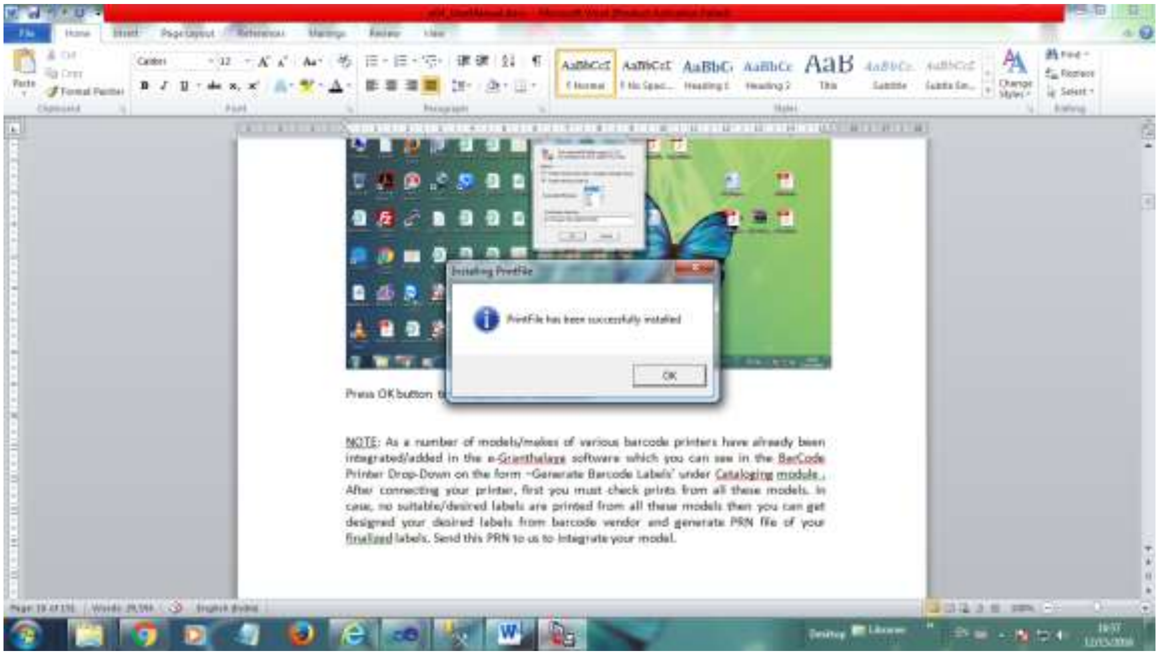
Installation of "PrintFile" Utility

For getting print on Barocde Printer – user needs to install "PrintFile" utility in their PC. PrintFile utility is free and can be downloaded from http://www.lerup.com/printfile/ or search from google. Following screen will appear from download option:-

Once the PrintFile utility is downloaded then Un-zip the utility and double click 'Setup' file to install it in your PC. Following screen will appear:



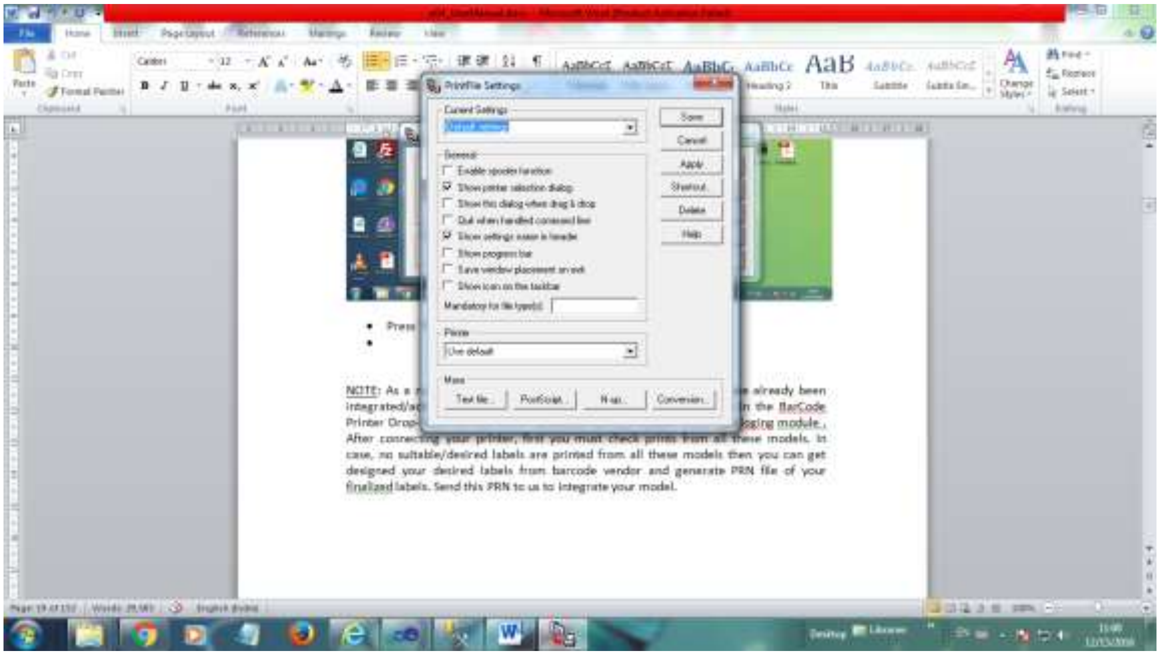
Press OK button to complete the Installation.



How to Set "PrintFile" Utility

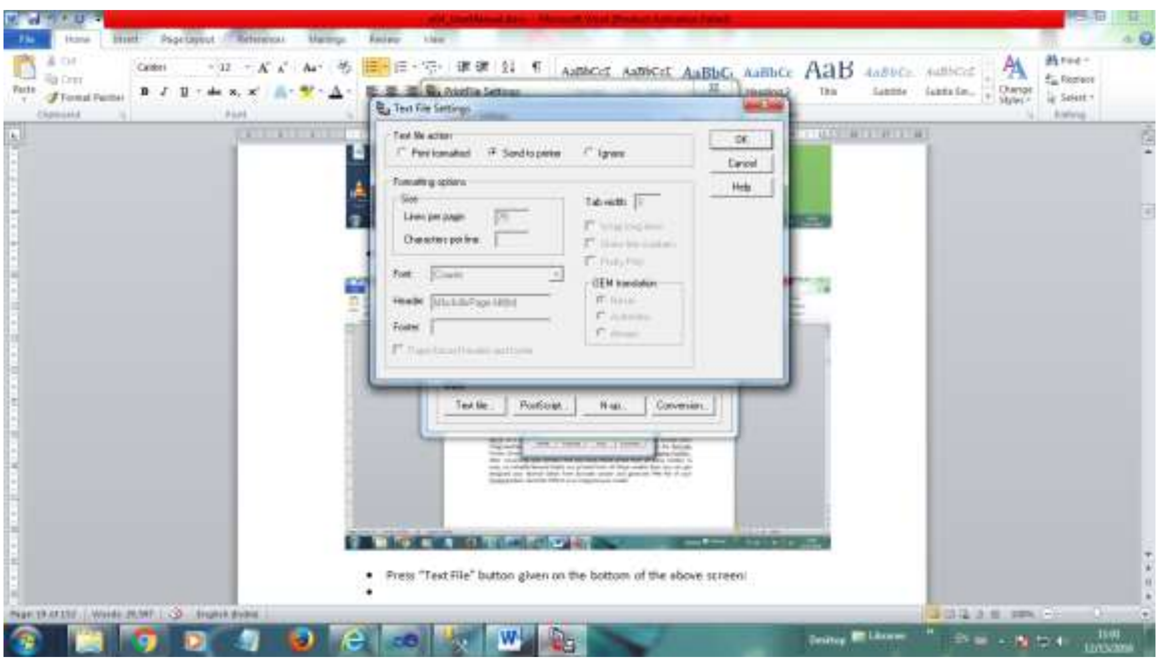
- Once 'PrintFile' is installed properly then a shortcut is created on the desktop with the name "PrintFile" – double click it to open it:

- Press 'Setting' button

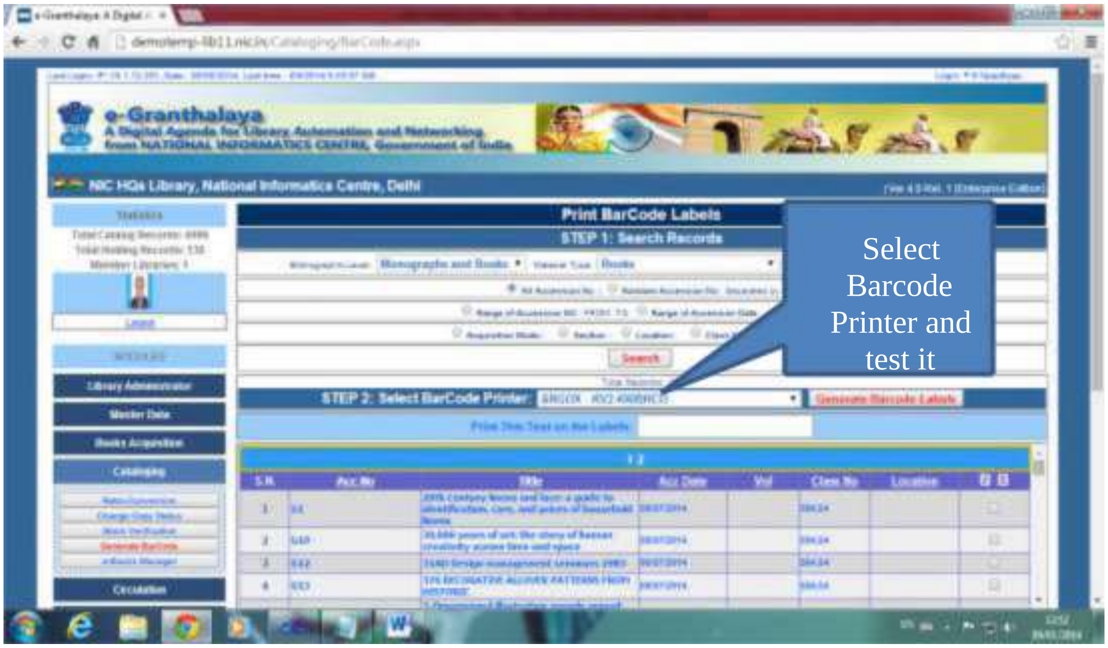


- Press “Text File” button given on the bottom of the above screen:
- Select Option – “Send to Printer”
- Then press OK
- Then press SAVE.
- Then press EXIT.

Now, you are ready to print the Barocde Labels on Barcode printer. How? Please read “Cataloging” Chapter for details.



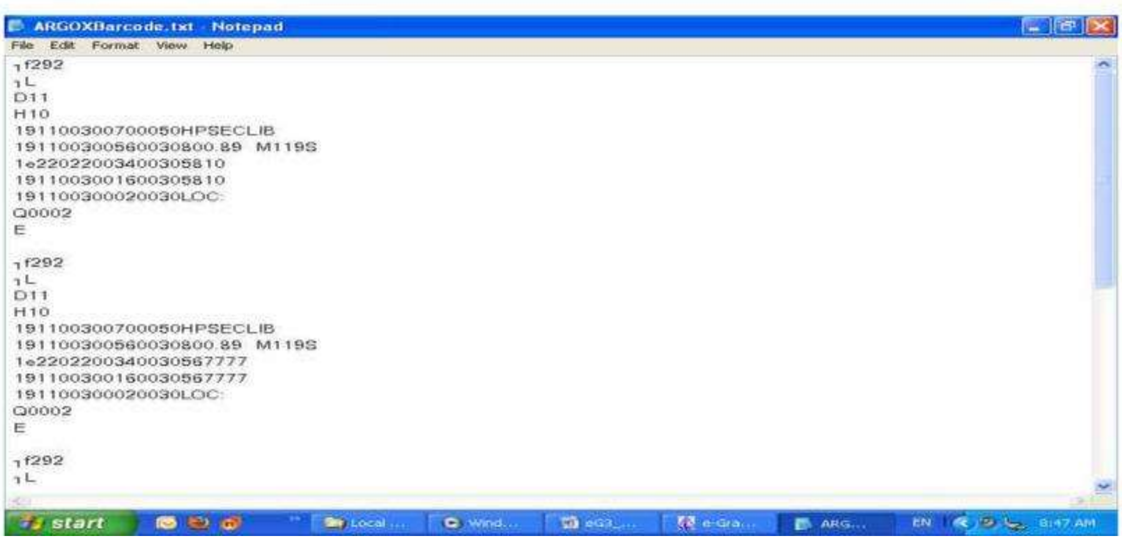
NOTE: As a number of models/makes of various barcode printers have already been integrated/added in the e-Granthalaya software which you can see in the BarCode Printer Drop-Down on the form –Generate Barcode Labels’ under Cataloging module . After connecting your printer, first you must check prints from all these models. In case, no suitable/desired labels are printed from all these models then you can get designed your desired labels from barcode vendor and generate PRN file of your finalized labels. Send this PRN to us to integrate your model.



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.

NOTE: Under the 'Update Library Profile Form' of LIBRARY ADMINISTRATION, you can save your Barcode Printer and then same Barcode Printer will automatically be selected in 'Generate Barcode Form' under CATALOGING Module.



PRN File of ARGOX Barcode printer

NOTE: While printing labels from Barcode printer attached in your Desktop, you need to make it a 'Default Printer'. In eG4, Barcode will not be printed direct from eG4 on pressing PRINT Button. Rather once you give command from eG4 after selecting your barcode printer from drop-down – a prn file will be saved on your client and then you need to open the file and print if manually.

What data printed on Barcode Labels

- Accession Number – Mandatory
- Barcode Lines of Accession Number - Mandatory
- Library Code - Optional
- Call No – Optional
- Collection Type (C/R) – Optional
- Shelf No (Optional)

2.11. RFID Integration

RFID is the latest technology being used in libraries for circulation and other purposes. RFID, has been integrated with eG4 where SIP2/NCIP Protocol guidelines followed using a Web Service. RFID web Service is integrated with eG4 where service end points are consumed by RFID GUI/Driver at user end. eG4 RFID Web Service is hosted in NIC Cloud within every cluster. The Service END points are given to RFID vendor to integrate service with their driver installed at user end.

NOTE: User library needs to interact with NIC team for detailed discussion before purchasing of RFID.

Efforts will be made to integrate the RFID systems with e-Granthalaya Software from major vendor in the country. One such vendor i.e. RapidRadio has already been integrated with e-Granthalaya Software.

2.12. 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. SMS service is already integrated/enabled in NIC cloud and will be used at no cost.

How to send SMS

At present SMS messages can be sent in eG4 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 eG4.

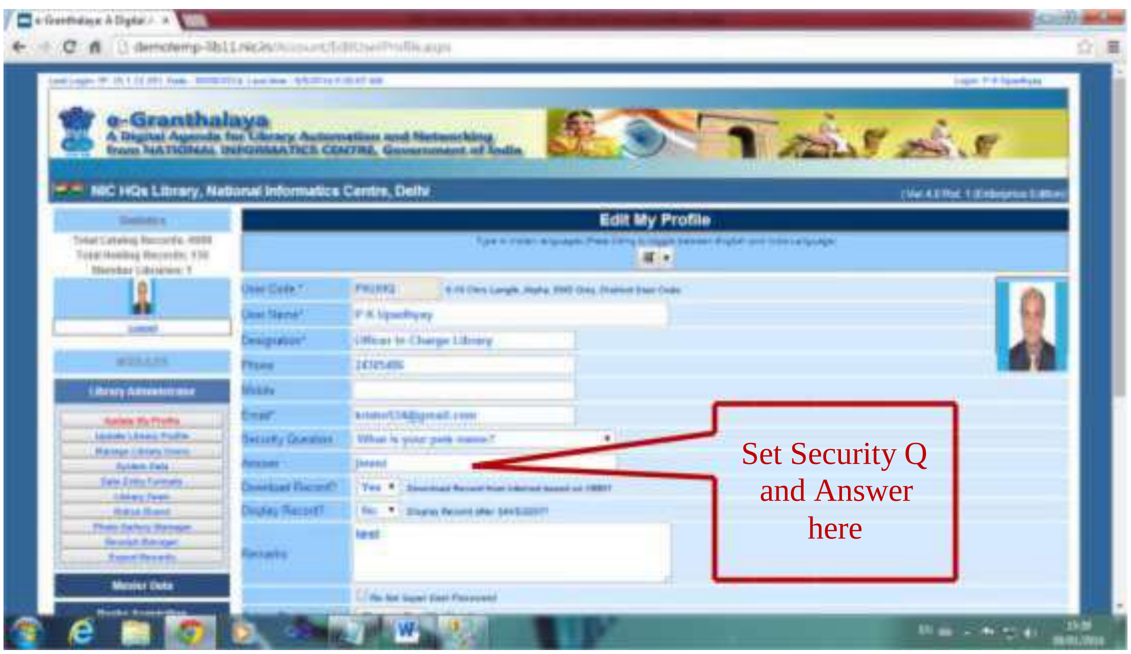
2.13. Smart Card Integration

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 eG4 for circulation of the books. For using smart card, select the Option 'Smart Card' on ISSUE-RESERVE Form and swap the card in card reader to display the member details of the corresponding Member No stored in Smart Card. 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.

NOTE: Same Member Number must be stored in the smart card data to call the record from MEMBERSHIPS Table.

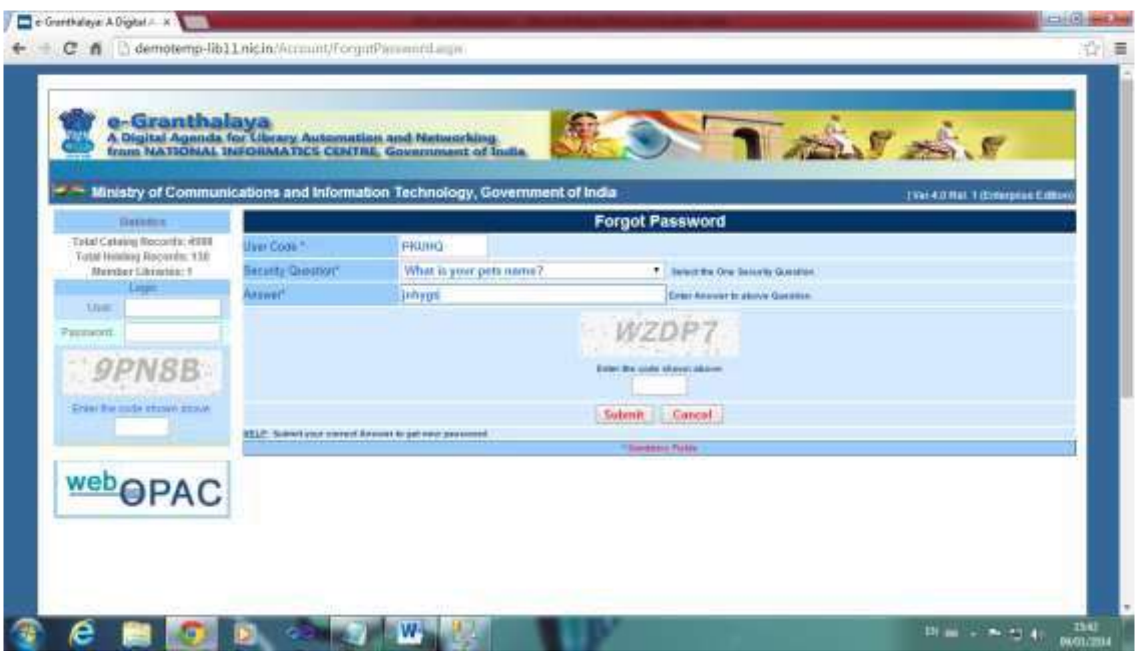
2.14. When You Forgot Password

In eG4, There is no option to see the Password from Table as password is saved in encrypted mode. Only possibility is to re-set password again by giving the correct answer of 'Security Question' you have saved in your profile. **Therefore, it is essential first to set your Security Question and Answer in the 'Update Your Profile' form on first Login.**



To re-set your Password, click 'Forgot Password' link available on the main form – a password re-set form will be displayed where you will ask to re-set the password as below:

On clicking the above link – below seen form will appear to set your password again. Once Password is re-set/saved – a token will be mailed to you along with a link to activate the password within few hours. You need to click the link given in the mail sent to you – it will activate your recently set password.



2.15. Print Options

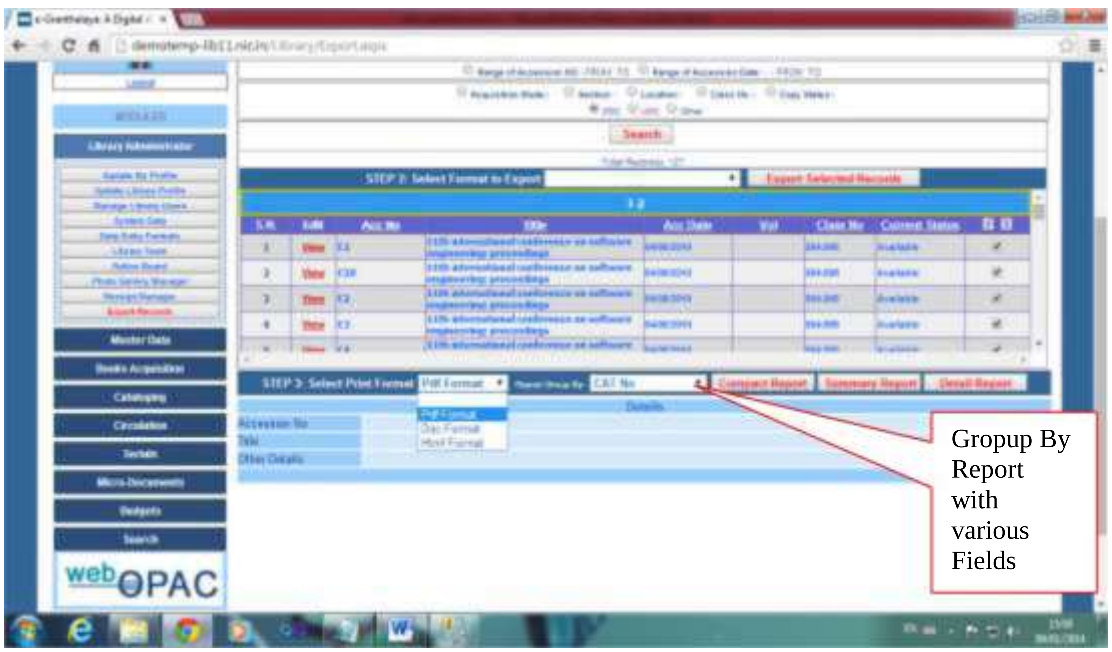
e-Granthalaya provides various options for generating Reports of many kinds in all the forms of data entry and search. Technologically, eG4 uses 'Crystal Report' tool for designing and generating Reports of various kinds. Crystal Reports provide a free tool for generating reports.

To view the report, you must install 'Crystal Reports Re-Distributable Package' given in the CD of the software as well as available at http://egranthalaya.nic.in web site. These crystal reports program are separate for 32 Bit as well as 64 Bit Pcs. These programs are also available as free download from Net.

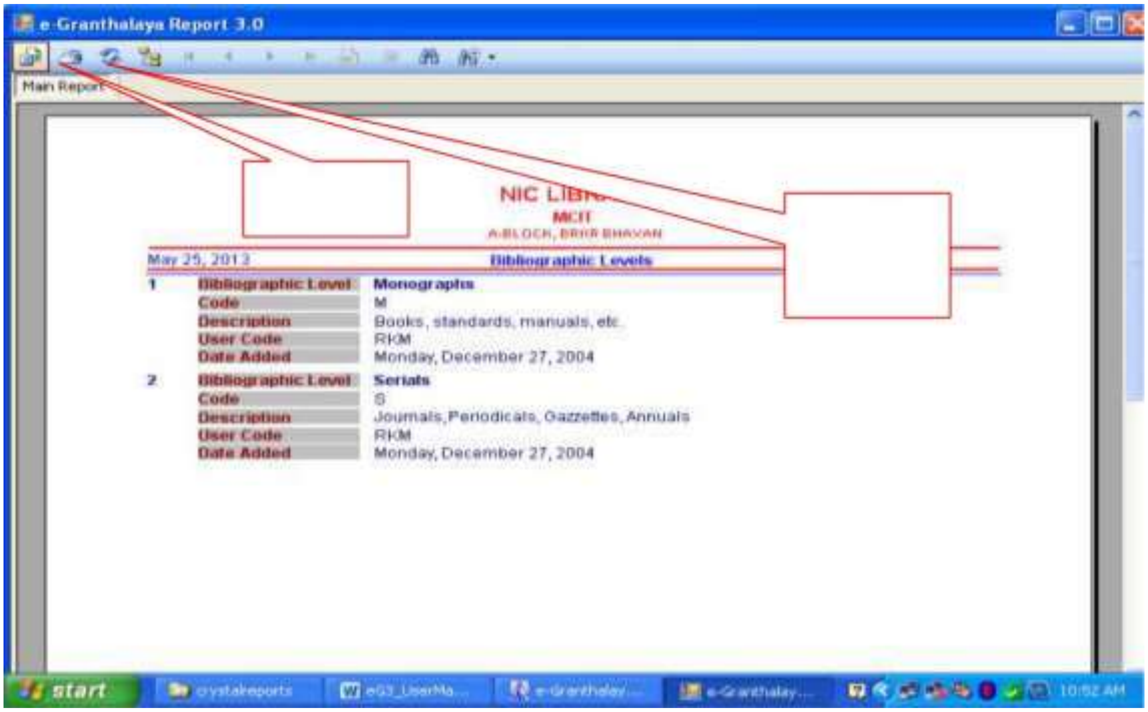
Type of Reports – Generally there are following three types of common reports in e-Granthalaya:-

Compact Report – Single brief record in one line
Summary Report – AACR2 format
Detailed Report – Report with all Fields for which data entered.
Special Report – Some function reports specific to the requirements.
Print Holdings – Print Catalog details along with Holdings data

You can generate Reports in the following Format:
PDF = Report in PDF format
DOC = Report in Doc format for editing, if any.
EXCEL = Useful for many purposes.



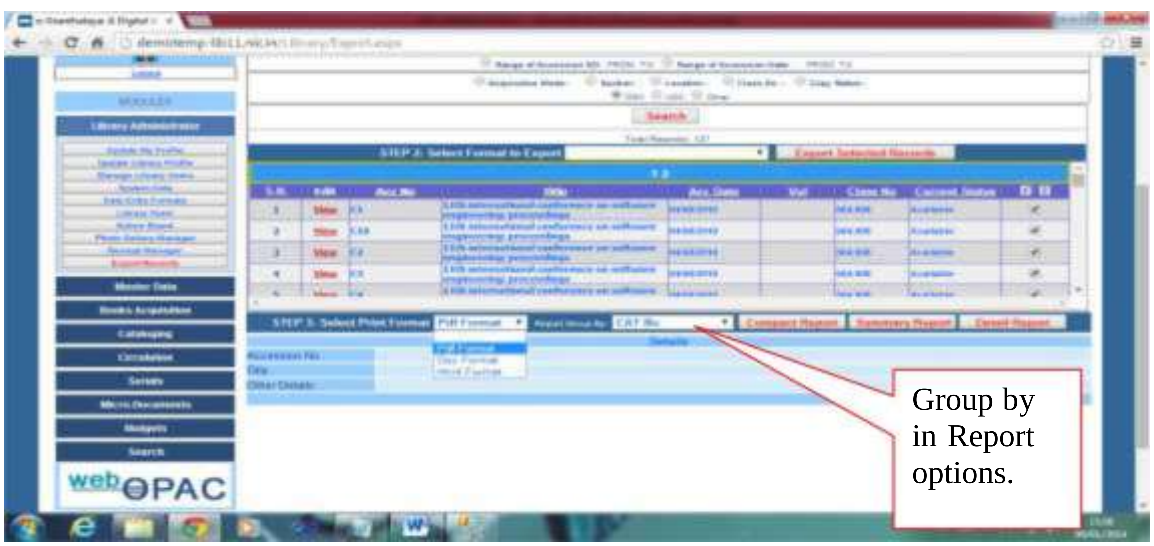
How to generate REPORT – To generate report on each form there are buttons given which you can press to generate the report. Such buttons are named as REPORT/PRINT, etc. Generally such buttons are enabled once data is displayed in the Grid/form. Once data displayed and you press PRINT or REPORT or other related buttons then report will be displayed on the screen.



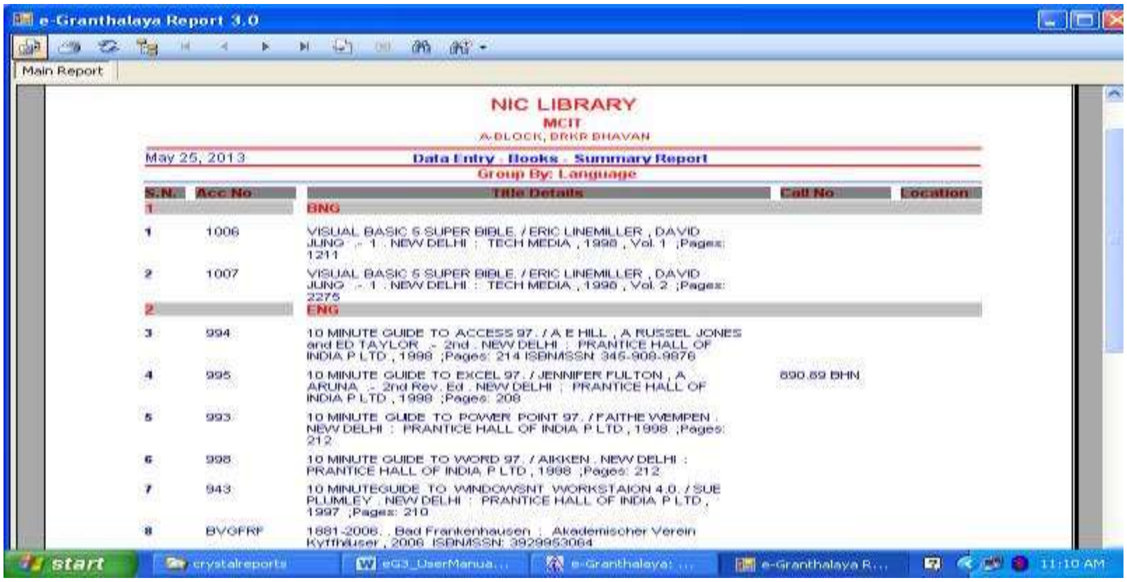
Other Report Options – Once Report is displayed on the Screen – there are various options available on the top bar menu of the Report –

Send Report on Printer – There is small icon of Printer on the Left Top corner on the Report – You can click this button to send the report on Printer.

Grouping of Report – There are one very important option for Report named as 'Group By In Report' as given below screen. This option is for generating same report group by different parameters. For example – you can generate a Summary Report of Data Entry made by a users with group by 'User', Collection Type, Class No, Section-Wise, Language Wise, Subject –wise and many more.



Example of Report – Language Wise



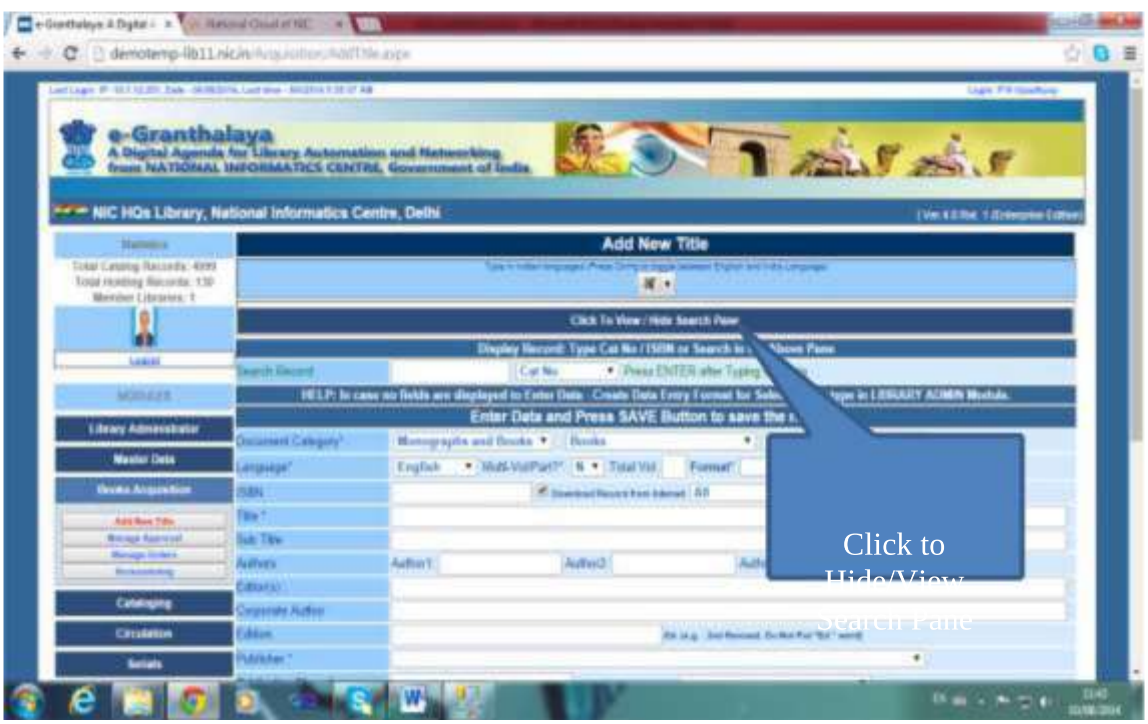
<u>Paper Size</u> – Generally reports is printed on the 'Default Paper Size' of the Default printer. Therefore, in case you have made Barcode Printer as Default Printer then reports will not be printed properly. Before generating the report you must check whether A4 size or desired size paper is the Default Paper Size in your Default printer.

This can be done by right click of the Default Printer and go to the 'Printer Properties'.

In case you wish to print Catalog cards on the Accession Register form – then you must create a new paper size as 5x3 inches and make it default paper of your printer.

2.16. Search Options

eG4 provides a SEARCH PANE on every form of the application which hide/view the search facility given there.



Once Search Pane is clicked – it shows various parameters and a SEARCH button which can be used to search existing records. The results are displayed in the Search Grid where various actions can be done to the selected/results.

EDIT Record

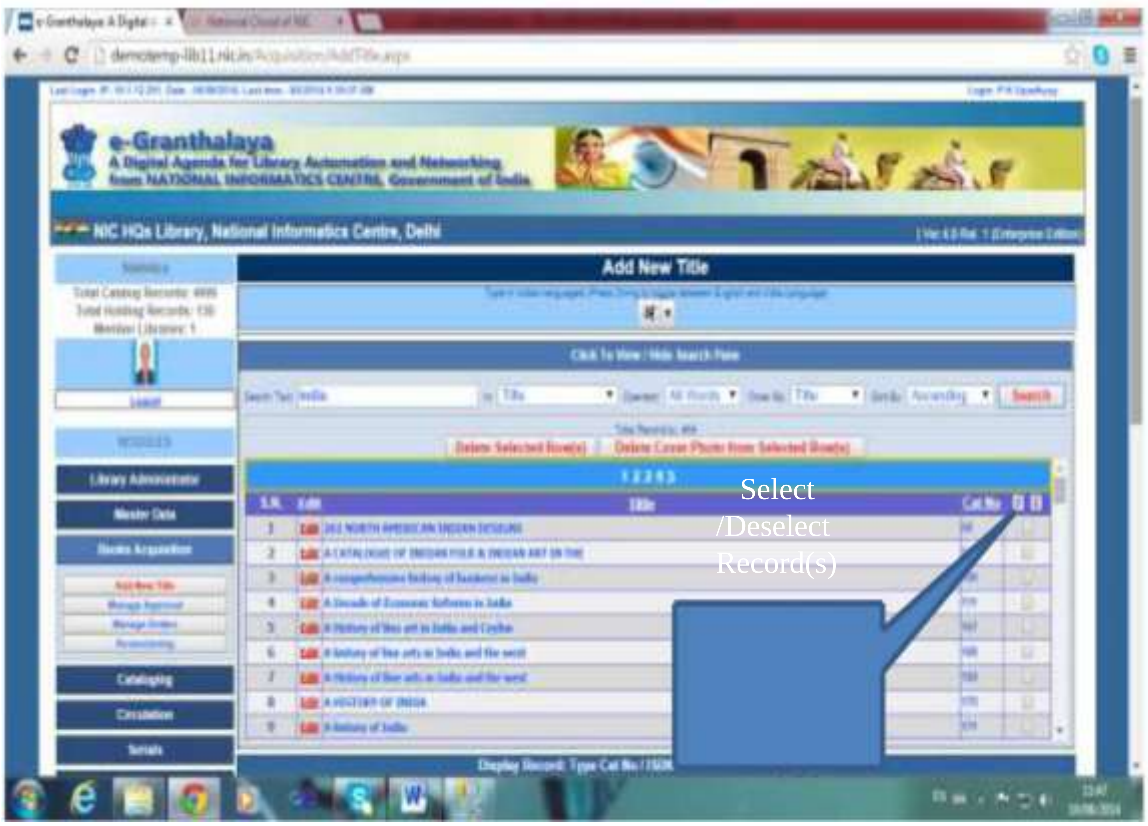
User can EDIT a particular Record by clicking the EDIT link displayed in the Left side. Once EDIT button is pressed – the selected record will be displayed below where record can be modified and then press UPDATE button to save the changes done.

Delete Records

The selected Records from the Result grid can be deleted by pressing the DELTE RECORD Button – if any. Similarly, many other actions can be performed for selected records.

Print Results

Results can be printed with various options and formats available in the drop-down on every form.



2.17. Digital Repository / e-Books / e-Documents Uploading

- Digital Files of Books/ Books Chapters / Articles Files / News Clipping / Loose issues can be uploaded in eG4 while doing data entry of such reading materials.
- Digital files can also be uploaded during edit of records of book/journals or any other materials also.
- Only copyrighted documents must be uploaded to avoid legal violation.

- E-Files must be compressed before uploading, compression may be achieved by commercial software from Adobe or other player.
- Image/tiff, pdf, media files formats are supported.
- The uploaded e-documents will be shared by other libraries in the same cluster and will only be accessible after member login on OPAC.
- Multi files can be uploaded in one record. Better to upload chapter-wise files of a book.
- E-files can be uploaded while adding/editing book/journals records, loose issues records / article / news records.
- Digital file is pick from desktop by pressing browse button.
- Besides, content file can also be uploaded in pdf format with every catalog records.

  WHERE TO UPLOAD DIGITAL FILES:-
- ADD Title Form in BOOKS Acquisition Module
- Retro-Conversion Form in CATALOGING Module
- E-Resources Manager in cataloguing module.
- Add Serials Title in SERIALS Module
- Article Indexing and News Clipping in Micro documents module

Chapter 3
How to Start the Program

e-Granthalaya 4.0 is a web-based application and can be run in any web browser. The Application has already installed in NIC Cloud and ready for use. For accessing e-Granthalaya, you need to following the steps given below:

Step 1: Run the URL in browser: http://eg4.nic.in

Step 2: Select your Library Cluster from drop-down and press CONNECT Button, following screen will appear where you can login the application. In case, Captcha value is not visible then you can REFERESH the page.

Once login is successful then following main page will appear where you can work with the application.

NOTE: In case, you do not see CAPTCHA on the above page below login then refresh the page and captcha will be displayed.

NOTE: eG4 provides 3-tier security in terms of type of Users who run the various modules of the application. There are following three types of Users which will be created for the application:

A. **Database Administrator** – This will be the first user which you will need to create for the first Time as steps given below. This user will be database owner and will create further:-
   a. Library Account for Each and Every Library which will participate in centralized Database.
   b. Super User account (Library In-Charge).
   c. Will take database backup
   d. Will manage Log

   Database Administrator can access only DATABASE ADMINISTRATOR module and can not access any other modules of the Application.

B. **Library Administrator** – This will manage library profile and will create the Account for other general users (Library Staff) with the permission to respective modules and Functions which they can perform in the software.

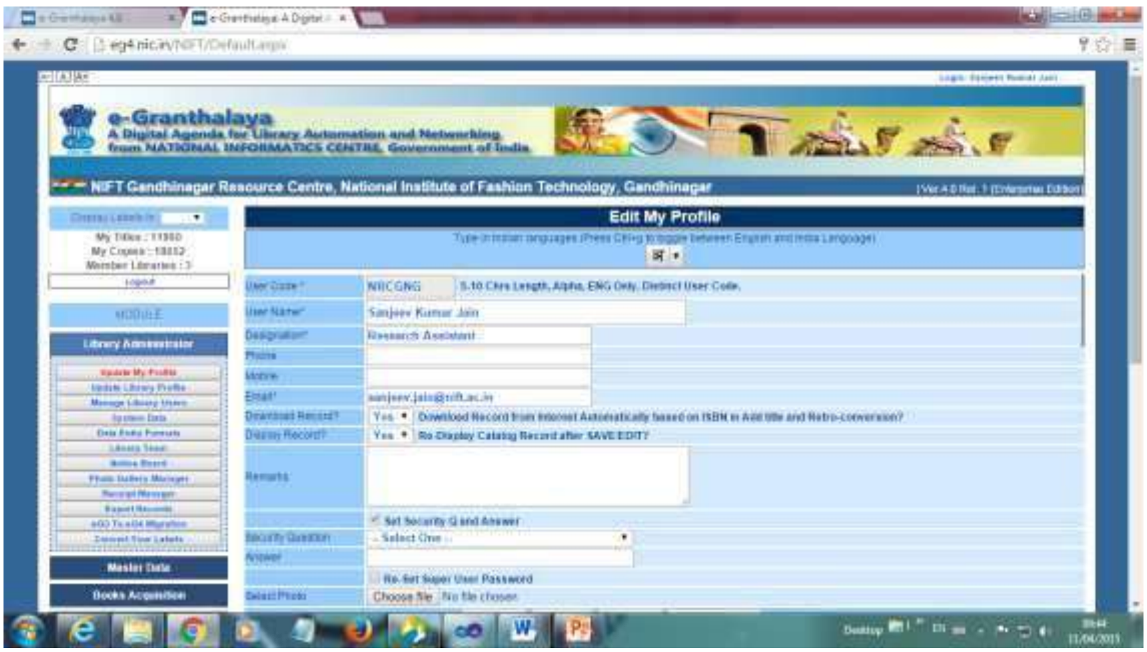
C. **Simple User** (Library Staff) – who will work with the different modules and will do data entry and other jobs.

FIRST TASK AFTER LOGIN FIRST TIME: When you login the Application for the first time then the first most task you should do is to update your Profile (Link Update My Profile) and Set SECURTY QUESTION and ANSWER – update it. Security Q and Answer will help you to reset the password if u forgot it.

On First Time Login

For the First Time when you Login the application successfully, then you need to complete the following tasks:-

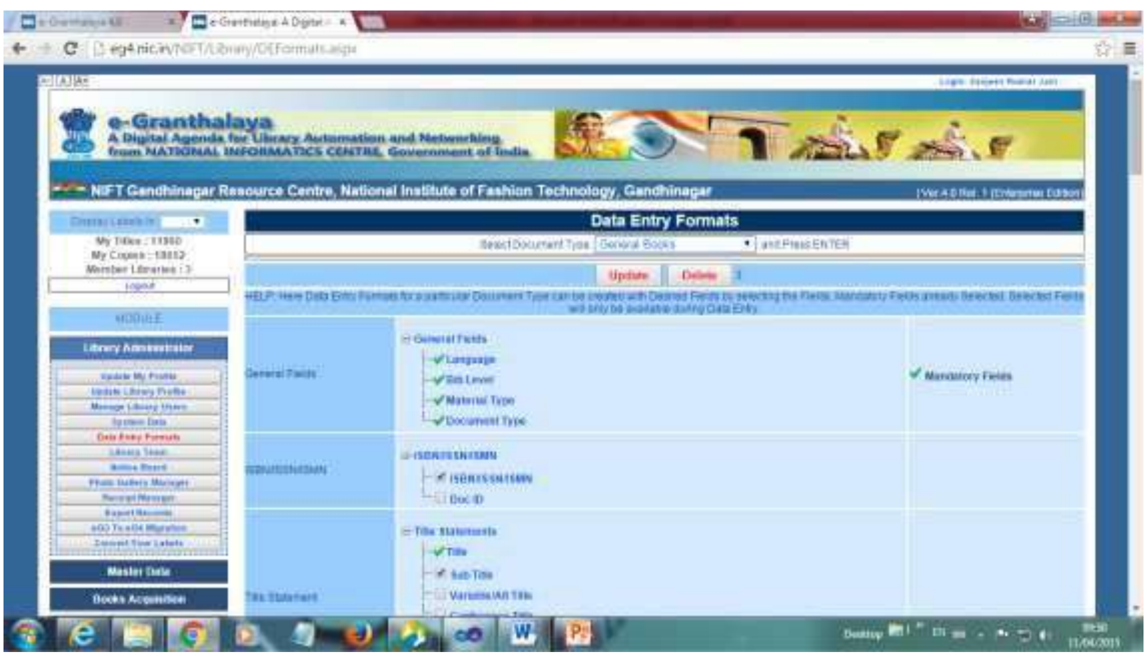
- Update Your Profile – This form is available under LIBRARY ADMINISTRATOR as well as under MASTER DATA module. You need to set Security Question and its answer which will be used to re-set your password if you forgot it. The Security Answer is case-sensitive and you must remember it for future use. You can set other user-specific settings in this form like download records during data entry automatically based on ISBN number, display records after SAVE and UPDATE. You may upload your photo also.



- Update Library Profile – You must update details of your library where you can enter data in ENG as well as in your Local Language. You need to save Logo of your library as well as Library Header Image which will be displayed in all the Reports as well as in OPAC pages. Besides, you can enter Library and Organization History, Services and other details also

  Here on this form you can upload Library photo and Logo of the organizations which will be displayed on OPAC Home page as well as in Reports.

- <u>Data Entry Format</u> – This form is available under LIBRARY ADMINISTRATOR Module and can be used to create DATA ENTRY FORMATS of all Types of Documents which will be entered in ACQUISITION and CATALOGING Modules. Here you can select the Fields you wish to display for data entry in data entry modules of the software.



Chapter 4
Database Admin Module

(THIS MODULE WILL ONLY BE USED BY NIC DB ADMINISTRATOR)

This module will be used by 'Database Administrator' only and will create account for (If not already created or whenever new library account is required):-

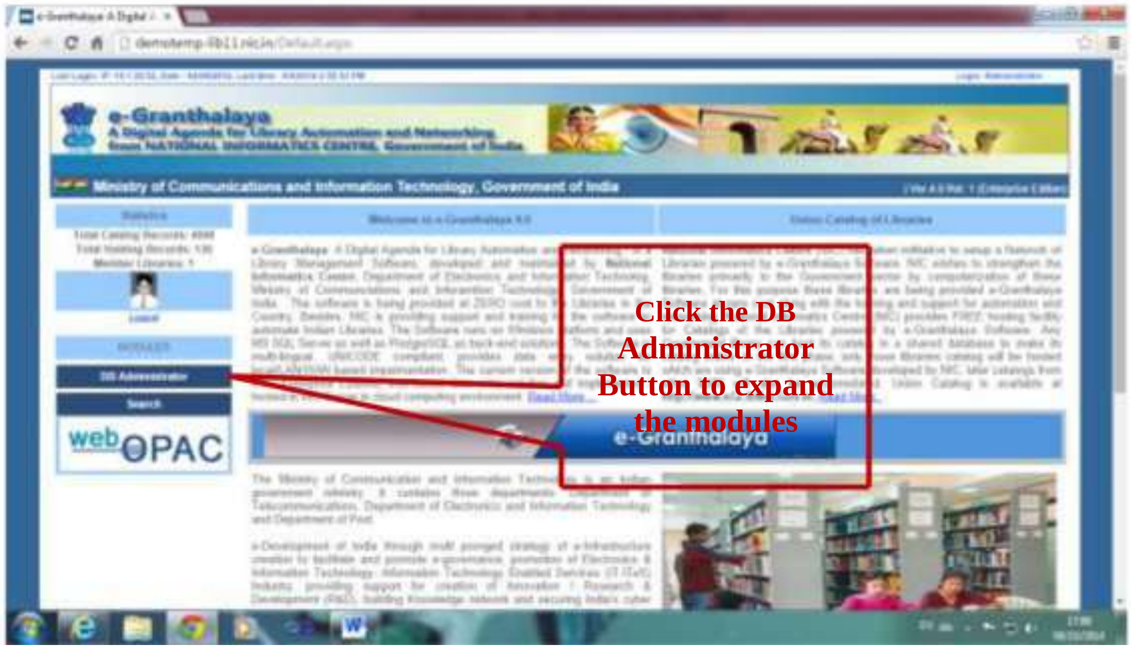
- Will Create a new account for Library.
- Will create a new account for Librarian/Library Administrator.
- Will manage database Logs.
- Will take database backup (if data base is hosted in local PC/Stand-Alone Mode)

4.1. How to Login eG4?

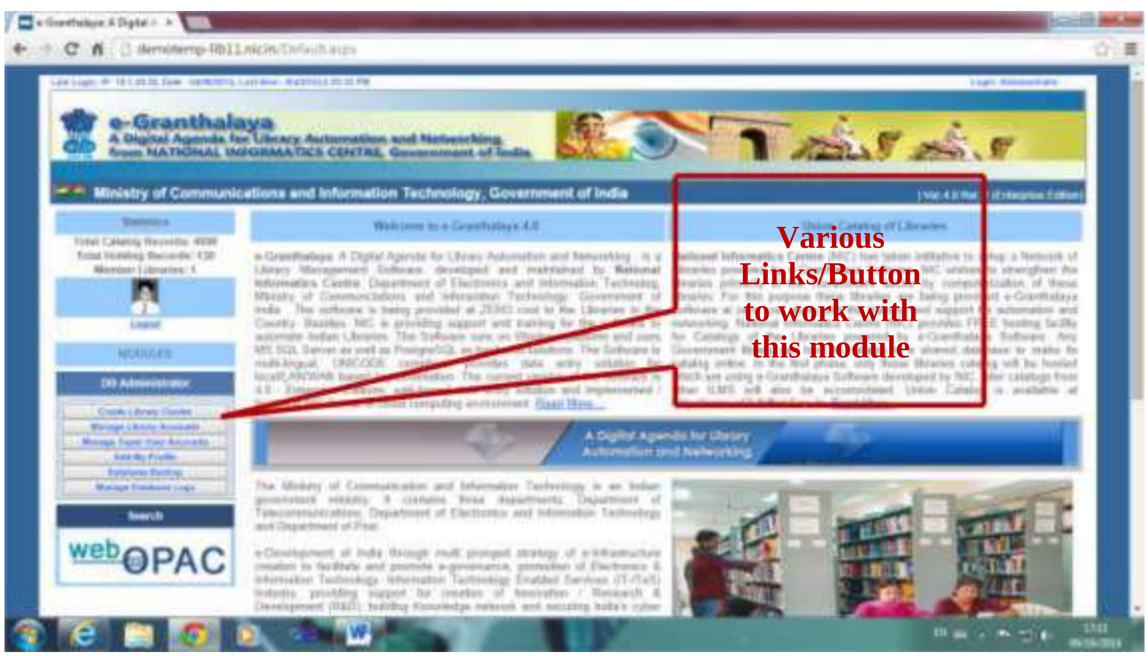
Once eG4 is run in any browser and if already Database Administrator Account is created then Database Admin Module can be accessed by Login on the following screen:

NOTE: During Login, you need to enter CAPTCHA value as seen and displayed on the above screen. This value will be changed automatically with every login – this is required for security purpose.

On Successful login, following screen of e-Granthalaya 4.0 is seen with the access of Database Administrator Module:



Click the **DB Administrator** caption to expand and to see what links / buttons are there under the module. Following screen shows various links and buttons are available under this module:



Database Administrator can do the following tasks:

- Create Library Cluster with its details.
- Create Library Account.
- Create Super User Account (Librarian / Library Administrator Account).
- Edit his/her profile – can change security Q/Answer and set/reset password.

- Manages Database Backup (if installation is in Stand-Alone/LAN based).
- Manages Database Log.

4.2. How to Create/Manage Library Cluster

'Library Cluster' denotes the Parent Organization under which many libraries exist and wish to use e-Granthalaya for their automation and networking. For example, All Kendriya Vidyalayas are working under 'Kendriya Vidyalaya Sangathan (KVS) – a Cluster with n number of libraries. In case, there is only one library exists or wish to use eG4 for its automation – still it is essential to create account for Library Cluster. Library Cluster will contain details of the parent Organization as shown in the screen below. To enter / create library cluster – do the following steps:

4.2.1. How to Add New Cluster - Steps

- Click 'Create Library Cluster' button given under the module in the left side of the main form – a data entry form will be displayed as shown below.
- Enter Data in the Text Boxes – All fields are mandatory. Type the data in local language also by selecting language from 'Language drop-down' given on the top of the form.
- Once data entry is complete, press SAVE button to save the record. On saving the record – you will get a message.

4.2.2. How to Edit/Update Cluster Details – Steps

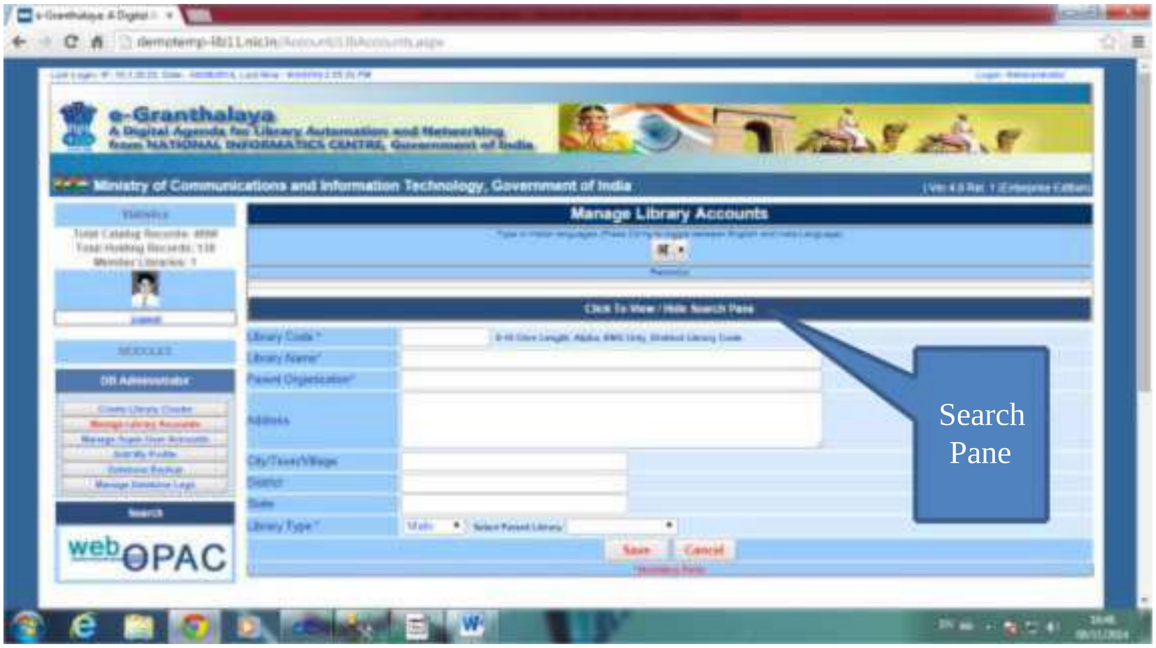
- Over-write the Details and press UPDATE button to save changes.
- You can choose to upload Logo of the parent organization on this form.

4.2.3. How to Delete Details

- You can not delete the Details of the cluster/parent organization. These details will be displayed on the first form of eG4 as well as on OPAC home page.

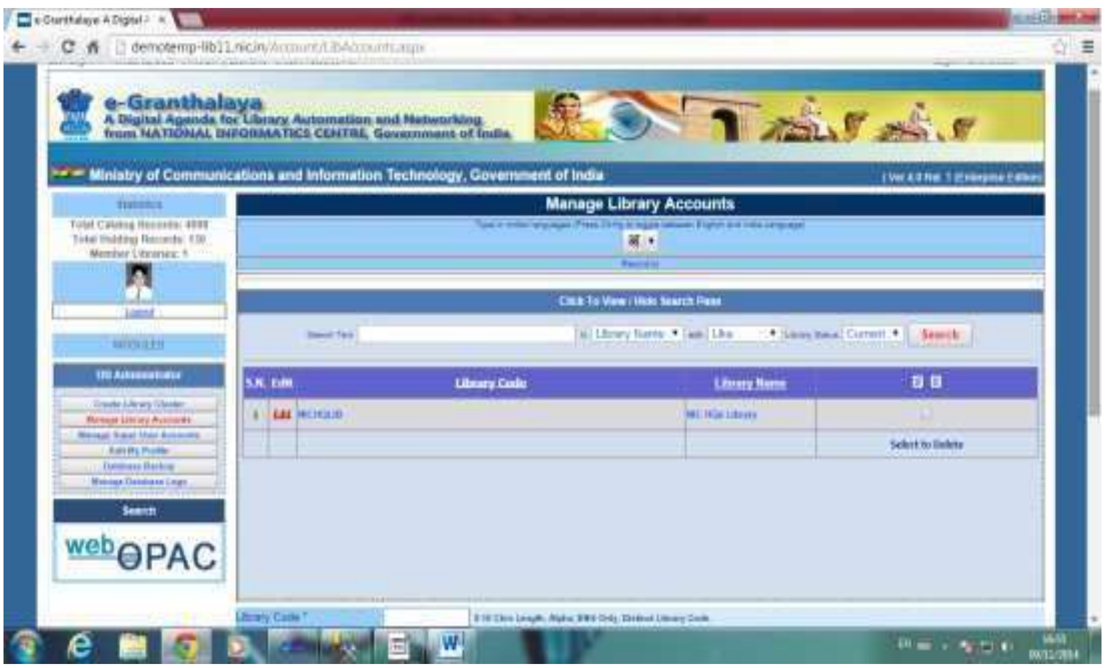
4.3. How to Create Library Account?

Click the button – 'Manage Library Account' from Database Admin Module – 'Manage Library Account' form will be displayed as shown in the below screen:



4.3.1. View / Search Library Account Already created

In case, already few library accounts are created then you can view/search these accounts on this form. This can be done by clicking the 'Search Pane' seen on the top of the form under form heading – caption is 'Click to View/Hide Search Pane'. Once you click 'Search Pane' then it gets slide down and search options are seen where you can search the existing records by typing the search parameters and by pressing the SEARCH button.



4.3.2. How to Create New Library Account

To create Library Account type/enter the data/details of the library. Enter a unique Library code (Which you can not change later), Library name, etc. Library Type:

Select MAIN if it is main library and select 'Branch' if it is a branch library – in case of Branch Library – first you need to create an account for MAIN Library.

- Add Data / Details of the library
- Press SAVE button to save the record.
- Library Code must be unique (alpha-numeric with min 5 and max 10 characters.)

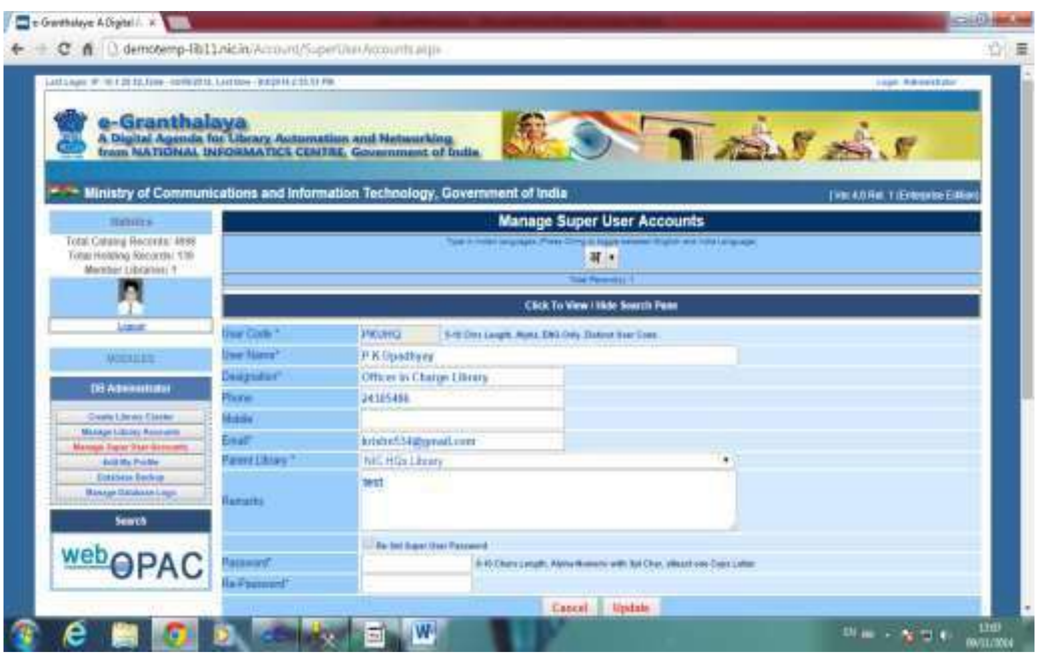
4.3.3. How to Update Library Details

- Search Record of existing library from 'Search Pane' – press EDIT button from grid results.
- Change / edit the data
- Press UPDATE button to save the changes.
- You can not change the LIBRARY CODE.

<u>NOTE</u>: Library Records can not be deleted from database.

4.4. How to Create Librarian/Library Administrator Account?

Click the button –'Manage Super User Account' from the module in the left side and you will get a new form where you can create/edit/search/print the Super User Account. Super User Account means Librarian / Library Administrator account.



4.4.1. How to Add New Super User Account

- Enter data / details of the Super User / Librarian
- Enter a unique USER CODE which can not be changed later.
- Better to enter user code in alpha digits with pneumonic meaning.
- Automatically it will be seen in Caps.
- Mandatory Fields are marked with * sign

- Enter the Strong password with min 6 digits – must be combination of digts / alpha/ special characters. Must remember it.
- Select Library from drop-down for which account is being created.
- Press SAVE button the save the record
- Only one super user account can be created for one library

4.4.2. How to Edit Super User Account

- Search the existing super user records from 'Search Pane'.
- Press EDIT button from the Result Grid.- It will display the account details in the form.
- Change the desired data, you can not change user code.
- Press UPDATE button to save changes.

4.5. How to Edit his/her profile?

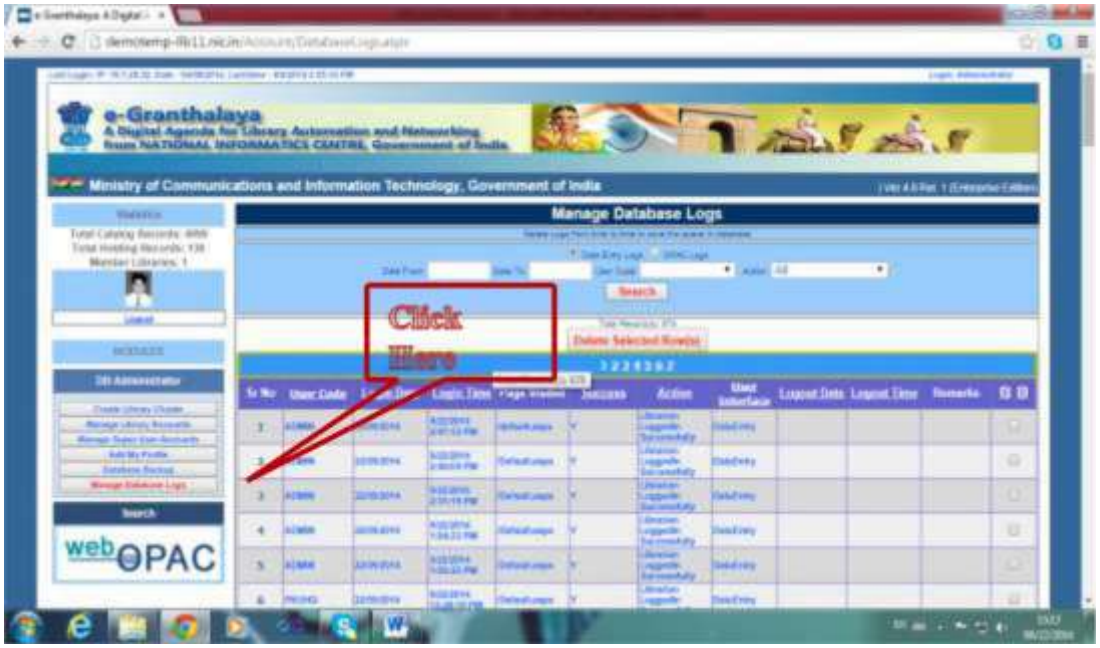
Database Administrator (who has login the this module) can edit / update details of the profile with more fields. He/she can reset security Question and Answer and can change other details. To view the form – click the button – 'Edit My Profile' from the module in the left side, following form will appear.

How to Update Details

- Change the data / details.
- You can upload your photo (not bigger than 90 kb) to be displayed on the form by browsing the file from your local drive.
- Press option 'Reset Password' if you wish to change it.
- Mandatory fields are marked with * sign
- User Local Language option from top of the form where you can select the language for data entry.
- Press UPDATE button to save the changes.

4.6. How to manage Data base Log?

This form is used to manage the Logs of the users and members who are using e-G4 web site. This is very useful to get report on their activities, what forms/data they are using/searching frequently, how many times login failed/successful, and time they remain on the web site, etc. To access Log, you need to click the menu button – “Manage Database Logs” under DB ADMINISTRATOR module as given below:



How to Search Database Log?

You can search database log by giving various parameters given on the top of the form like User or Members code, actions along with Cut-off-date. You can search either ‘Data Entry Logs’ or ‘Members/OPAC Logs’ by selecting it from appropriate option button. In case, you do not select any parameters then all records will be displayed in the Result Grid where you can further sort the records for convenience.

How to Delete Logs?

The web site logs must be deleted time to time as it takes time during login as well as use of the application – thus it can make the application slower. For deletion – select the records from right of the grid / or press ‘Select All button’ to select all rows on the current page of the grid – then press DELETE SELECTED RECORDS.

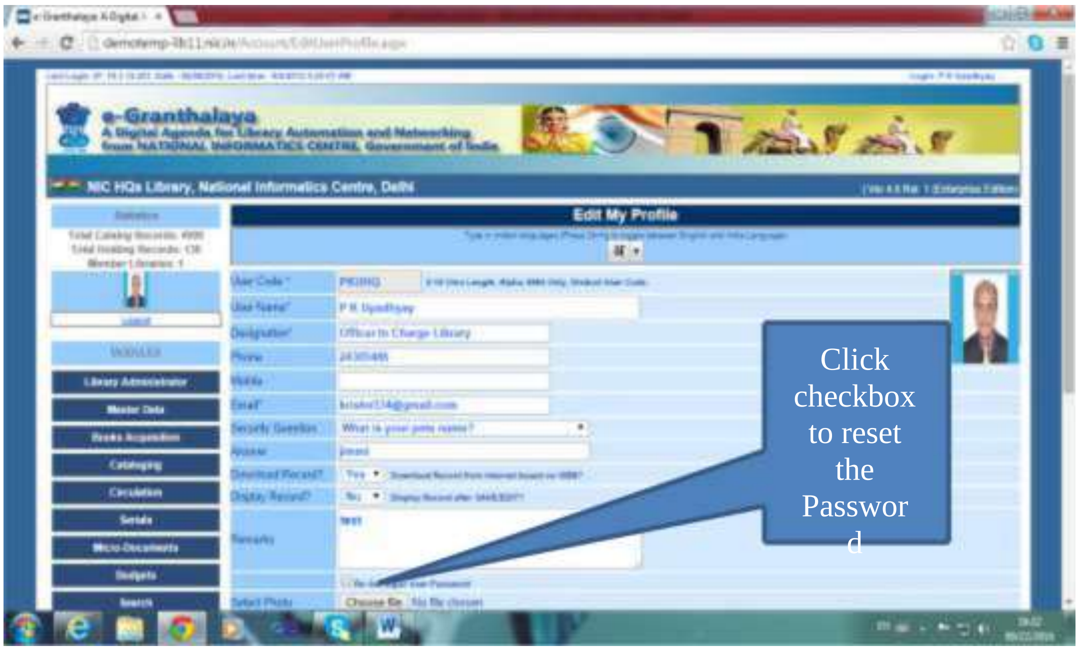
Chapter 5
Library Administrator Module

This module will be used by 'Library Administrator (Librarian)' only and will create/manage his/her staff/user accounts with necessary permissions. Besides, some of the utilities and functions will only be managed by Library Administrator such as Import/Export of Data, setting up of System data, Creation of Data Entry Formats and managing Receipts of the payment received. This module will manage following functions:-

- Will Create a new account for Library Staff (general users) with permission of desired modules.
- Will change/edit/update Library Profile.
- Will manage System Data.
- Will create 'Data Entry Format' for each kind of documents.
- Will enter details of 'Library Team' members – this details will be published on OPAC page.
- Will manage Notice Board Items.
- Will manage Photo Gallery of Library.
- Will manage payment / Receipt Manager received in library.
- Will manage Export of the Records.
- Will manage Import of the records.

5.1. Update User Profile

Here, you can update your Profile with some more fields like security Question, Answer, change of password and some other settings. To load the form – click the menu button – Update My Profile, following form will be loaded with pre-saved data.



- Enter all details of the user logon the software
- Set Security Question and Answer in the Form. These two values are useful to recover the password later.
- Mandatory Fields are marked by * sing
- **Display Record**? Yes/No – For displaying the catalog record automatically just after save new record in 'Add Title' and 'Retro-Conversion' Forms.
- **Select Default Language** – This will display the Labels in the selected Language on each form of the application.
- **Reset the Password** – if required
- **Browse Photo** – To upload the user photo – photo must be compressed.

Once you modify the data then press UPDATE button to save changes in the database. User can upload his/her photo also here.

5.2. Update Library Profile

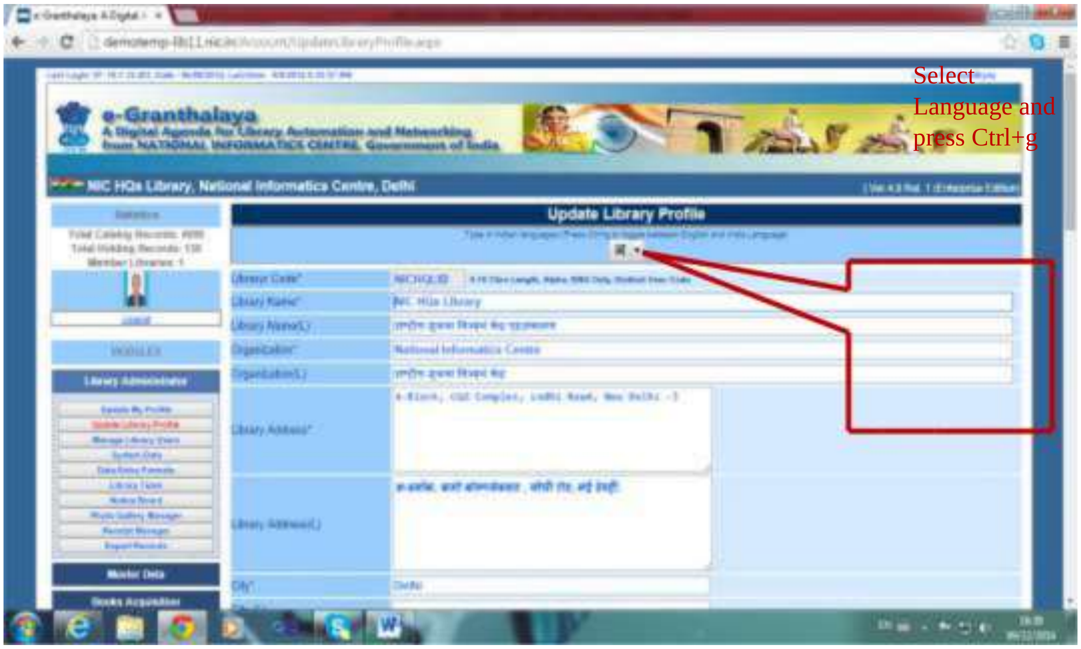
On this form, library administrator can update the Library Profile with more advance settings as given on the form, some of special settings are listed below:

- Enter full details in ENG as well as in Local/Regional Language (RL). You can use built-in facility to enable local language by selecting the Language from the top of the form – select language and press Ctrl+g
- SMS Account details required to create the SMS Profile.

- Select Default Barcode Printer Name which library will use to print the labels in the cataloging module.
- **Classification Scheme** and **Cataloging code** being used in the Library just for information purpose only.
- **SMS** Details for Integration of SMS account with eG4 – will be done in future.
- **Want ACQ Fields?** - PURCHASE DATA – This value (Yes/NO) indicates that during Retro-conversion Data Entry of Books – whether library wish to enter Purchasing Details of the book or not. If YES is saved that ACQUISITION Fields will be visible in the Retro-Conversion Data Entry.
- Can upload Library Logo and Library Profile Photo to be displayed in the applications.
- **EMAIL** of Library / librarian needs to be given where copy of the all the messages will also be receiving in this mail.
- Select name of your "**Barcode Printer**" if any , from drop-down where it will be selected automatically in "Barcode Generation" form during generation of the barcode labels.
- **Send Mail** – Select Y in case you wish to send the mail message to the member during issue/return and other services.
- **Auto– Acession** : This feature will allow to enable "Auto Accessioning" utility during "Accessioning" process under Books Purchase Module where Accession Numbers will be assigned automatically. This will allow for bulk accessioning of copies of the same book.
- **Online Reservation** – This will allow to enable Online Reservation by the library member while accessing the catalog using OPAC Interface of e-Granthalaya after login.
- **Generate Fine Receipt** – This will allow to generate Fine Receipt, if any during Return of the Book using Circulation Module.
- **Auto Gete Pass –** This will allow to generate Gate Pass during Issue of the books.
- In other fields, fill the data about your organization and library where bulleted paragraph may also be used.
- Upload Library/Organization Building **Photo** and Library/Organization **Logo** which will be displayed in OPAC pages. Library Logo must be uploaded of appropriate size as it will be displayed on all the reports and Member Card. After Uploading these images you are suggested to check these over OPAC pages and in case large size is there then you can re-size the image and re-upload again.

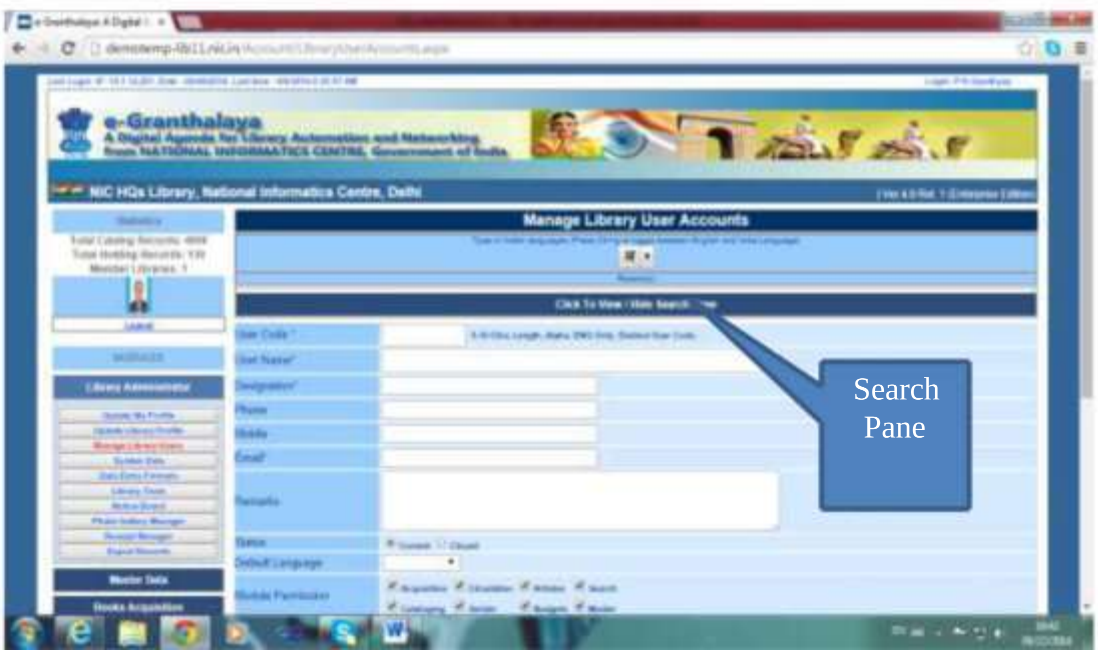
  NOTE: RL means data in Regional Language

Once, data is changed then press **UPDATE** button to save the changes.



5.3. Manage Library Users/Staff

This form is used to create account for Library Staff with particular module permission and other users related settings. This can be accessed by Library Administrator only. Click the menu button – 'Manage Library Users' from the module in the Left side – following form will be loaded.



Search Records

On this form, you can search the existing records of the users/library staff for which accounts were created earlier. This can be done by pressing the '***Search Pane***' on the top of the form – which will slide down and will show various search parameters to be used to search the existing users records. In case, no search parameter is selected and press SEARCH button – it will show all the records in the Result Grid. Once results appear in the Result Grid then you can EDIT / Print details of the selected users.

Create New Login for User

For creating new user account – load the form and :-

- Type the data in the text boxes.
- Enter unique USER CODE which can never be deleted and changed.
- Enter other details.
- Select Modules for which permission are assigned.
- Set strong password with minimum 5 digits with special characters, etc.
- Select Default Language from drop-down – to display the labels on every form to display in selected language if you have saved these labels in local language using utility given in Library Administrator – 'Manage Labels in Local Language' Form.
- Mandatory Fields are marked with * sign.
- Press SAVE button to save the record.

Edit User Record

Search the existing users in the Search Pane and press EDIT button in the Result Grid or type USER CODE in the user code text box and press ENTER – it will isplay record with full details where you can modify the data and press UPDATE button to save the changes.

NOTE: Users can type the data in local language – to enable local language press Ctl+g after selection of Language from the Language Drop-down on the top of the form. This feature only works when net connectivity is there in the PC.

NOTE: User records can not be deleted, rather you can CLOSE the status of the existing user by modifying the record and select 'STATUS' of the user.

Reset User Password

While creating new Login for user and during Editing of User Record, you can reset the User Password as given in the bottom text boxes on this form. For Resetting password during editing of User Record – click the option "Reset User Password" – two text boxes will appear where you need to type and re-type new password. Password must be strong type – min 6-8 characters, alpha-numeric, one letter Caps and with at least one special character.

Report can also be generated on this form by pressing the REPORT button available on this form.

5.4. System Data

This form is used for setting the System data which is generally pre-loaded in the database with Global values. It is requested not to delete/modify the system data as it may give run-time error. Rather new systems data can be added only if required.

5.4.1. Bibliographic Levels – There are three bibliographic Levels:-

- **M** = Monographs and books
- **S** = Serials
- **X** = Non-book Materials

5.4.2. Materials Types: There are various types of Materials categories under above bibliographic Levels which are given in the below:

- **M = Monographs and Books**
  - Books - CODE(B)
  - Manuals - CODE(M)
  - Patents - CODE(E)
  - Reports - CODE(T)
  - Standards Specifications - CODE(S)
- **S = Serials**
  - Periodicals - CODE(P)
  - Newspapers - CODE(N)
  - Annuals - CODE(A)

- **X = Non-Book Materials**
  - Manuscripts - CODE(X)
  - Cartographic Materials - CODE(C)
  - AV Materials - CODE(V)
  - Others - CODE(O)

5.4.3. Documents Types – There are various types of documents categories under each Bibliographic Levels and Materials Type as given in the following table:

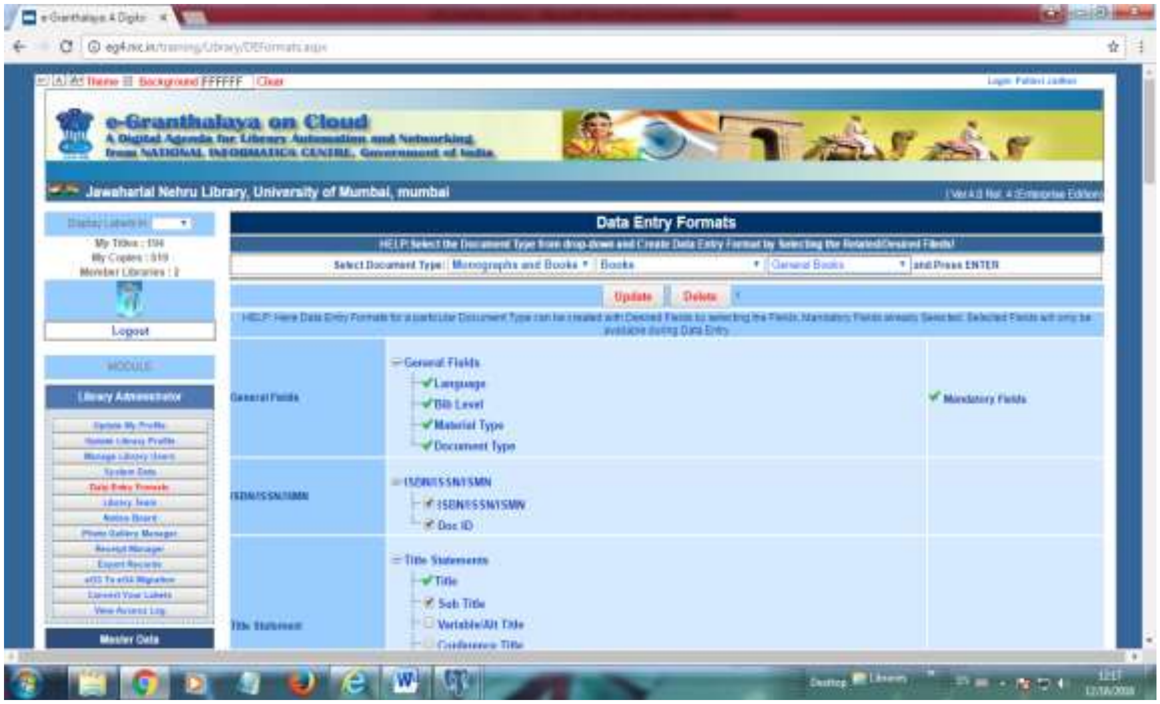
S.N.	BIB LEVEL	MATERIALS	CODE	DOC TYPE
1.	M	B (Books)	AM	Almanacs
2.	M	B (Books)	AB	Autobiographies
3.	M	B (Books)	BA	Bare Acts
4.	M	B (Books)	BB	Bibliographies
5.	M	B (Books)	CB	Composite Books
6.	M	B (Books)	CP	Conference Proceeding
7.	M	B (Books)	DT	Dictionaries
8.	M	B (Books)	DR	Directories
9.	M	B (Books)	EB	Edited Books
10.	M	B (Books)	EN	Encyclopedias
11.	M	B (Books)	BK	General Books
12.	M	B (Books)	GP	Govt Publications
13.	M	B (Books)	HB	Hand Books
14.	M	B (Books)	IC	Indian Codes
15.	M	B (Books)	LA	Local Acts
16.	M	B (Books)	MV	Multi-Volume
17.	M	B (Books)	TH	Thesaurus
18.	M	B (Books)	YB	Year book
19.	M	B (Books)	TB	Text Books

20.	M	E (Patents)	PE	Patents
21.	M	M (Manuals)	MN	Manuals
22.	M	S (Standards)	ST	Standards
23.	M	T (Reports)	GR	General Reports
24.	M	T (Reports)	TR	Technical Reports
25.	M	T (Reports)	DS	Dissertations
26.	M	T (Reports)	TS	Theses
27.	M	T (Reports)	LR	Law Reports
28.	M	T(Reports)	CR	Commission Reports
29.	M	T(Reports)	PR	Project Reports
30.	M	T(Reports)	RR	Research Reports
31.	M	T(Reports)	SX	Students Reports
32.	S	A (Annuals)	AR	Annual Reports
33.	S	A (Annuals)	AN	Annuals
34.	S	N (Newspapers)	NL	Newsletters
35.	S	N (Newspapers)	NP	Newspapers
36.	S	P (Periodicals)	AI	Abstracting/Indexing Services
37.	S	P (Periodicals)	JR	Journals
38.	S	P (Periodicals)	EJ	e-Journals
39.	S	P (Periodicals)	MG	Magazines
40.	S	P (Periodicals)	RT	Reprints
42.	**X**	**C**	**GL**	**Globes**
43.	**X**	**C**	**MP**	**Maps**
44.	**X**	**C**	**ML**	**Models**
45.	**X**	**C**	**AT**	**Atlas**
46.	**X**	**O**	**AC**	**Accessories**
47.	**X**	**O**	**FS**	**Fabrics Swatches**
48.	**X**	**O**	**FC**	**Fashion Collection**
49.	**X**	**O**	**GM**	**Garments**
50.	**X**	**O**	**JW**	**Jewellery**
51.	**X**	**O**	**TX**	**Textile Collection**
52.	**X**	**V**	**CD**	**CDs**
53.	**X**	**V**	**IM**	**Images**
54.	**X**	**V**	**PH**	**Photographs**
55.	**X**	**V**	**SL**	**Slides**
56.	**X**	**V**	**SR**	**Sound Recordings**
57.	**X**	**V**	**VR**	**Video Recordings**
58.	**X**	**X**	**XW**	**Hand-Written Manuscripts**
59.	**X**	**X**	**XM**	**Transcript Manuscript**

M B RB = Rare Books

5.5. Data Entry Formats/Template

This form is used to define the Data Entry Format for each kind of documents required for data entry. In eG4, there is flexibility for selecting the desired fields for data entry and user needs to select the fields required and will be visible during data entry of books and monographs using BOOKS ACQUISITION Module as well as CATALOGING module. Click the menu button – 'Data Entry Format' from the module in the Left side – following form will be loaded.



Two Main Categories of the Fields:-

2. <u>Cataloging Fields</u>

- General Fields (Mandatory) – Language/Bib Level/Material/Doc Type
- ISBN/ISSN
- TITLE Fields
- Contributors
- Edition
- Imprint
- Series
- Note/Remarks
- Abstract & Indexing
- Other Fileds

3. <u>Holding Fields</u>

S.N.	For Type of Data	Group/Family	Name of Filed	Nature M/O	Related with Document
1.	Cataloging Data	General Field	Bib Lever	M	All
2.			Material Type	M	All
3.			Document Type	M	All
4.			Language	M	All
5.		Standard No	ISSBN/ISSN/ISMN	O	All Except Non-Book Materials
6.		Title	Title	M	For all
7.			Sub-title	O	For All
8.			Var Title	O	For All
9.			Conference Title	O	For Conference Proceeding Only
10.			Conf. Start Date	O	-DO-
11.			Conf. End Date	O	-DO-
12.			Conf.Place	O	-DO-
13.		Contributors	AUTHOR1	O	For All
14.			AUTHOR2	O	-DO-
15.			AUTHOR3	O	-DO-
16.			EDITORS	O	-DO-
17.			TRANSLATORS	O	-DO-
18.			ILLUSTRATORS	O	-DO-
19.			COMPILERS	O	-DO-
20.			COMMENTATORS	O	-DO-
21.			REVISED BY	O	-DO-
22.			CHAIRMAN	O	Legal Documents Only (Law Reports/Acts)
23.			GOVERNMENT	O	-DO-
			CORPORATE AUTHOR	O	All Documents
24.		EDITION	EDITION	O	ALL DOCUMENTS
25.			REPRINTS	O	ALL DOCUMENTS EXCEPT NON-BOOK MATERIALS
26.		IMPRINT	PLACE	M	ALL DOCUMENTS
27.			PUBLISHER	M	-DO-
28.			YEAR (YYYY)	M	-DO-
29.		SEREIS	SEREIS TITLE	O	ALL DOCUMENTS TYPE
30.			SEREIS EDITORS	O	-DO-
31.		NOTE AREA	NOTE	O	ALL DOCS
32.			REMARKS	O	-DO-
33.			REFERENCE NO	O	-DO-
34.			MULTI-VOL (Y/N)	M	-DO-

35.			TOTAL VOL	O	-DO-
36.			URL	O	-DO-
37.			COMMENTS	O	-DO-
38.		ABSTRACT/INDEXING	SUBJECT	M	-DO-
39.			KEYWORDS	O	-DO-
40.			ABSTRACT	O	-DO-
41.		OTHERS	COUNTRY OF PUBLICATION	M	-DO-
42.			TRANSLATED FROM	O	-DO-
43.			ACT NO	M	LEGAL DOCUMENTS ONLY
44.			ACT YEAR	M	-DO-
45.	HOLDINGS		ACC NO	M	ALL
46.			ACC DATE	M	ALL
47.			PAGINATION	M	Mandatory for Print Publication/ Not Required for Non-Book Materiasl
48.			STATUS	M	ALL
49.			FORM/MEDIUM/FORMAT	M	ALL
50.			CLASS NO	O	ALL
51.			BOOK NO	O	ALL
52.			ILLUSTRATION	O	PRINT ONLY
53.			DIMENSION	O	ALL
54.			COLLECTION TYPE	M	ALL
55.			LOCATION	M	ALL
56.			BINDING TYPE	O	MANDATORY FOR PRINT PUBLICATIONS
57.			ACCOMPANYING MATERIALS	O	FOR PRINT ONLY
58.			SECTION	O	ALL

How to create new format

For creating a new format for any kind of document type follow the steps:-

- Select **Bibliographic Level**, **Materials Type** and **Type of Document** from drop-down at top of the form.
- Check the Filed required for data entry
- **Mandatory** fields are automatically selected with green yes sign and included in the format.
- For special type of document – you need to select related fields

- Fields are grouped based on their affinity for the document type.
- You can modify the format any time
- Press SAVE button to save the format
- Now, you can start data entry of the documents type for which data entry format is saved.
- Fields related with HOLDINGS are listed at the bottom of the form

How to Update Format

In case, format is already saved, then you can modify the format again for any desired change:-

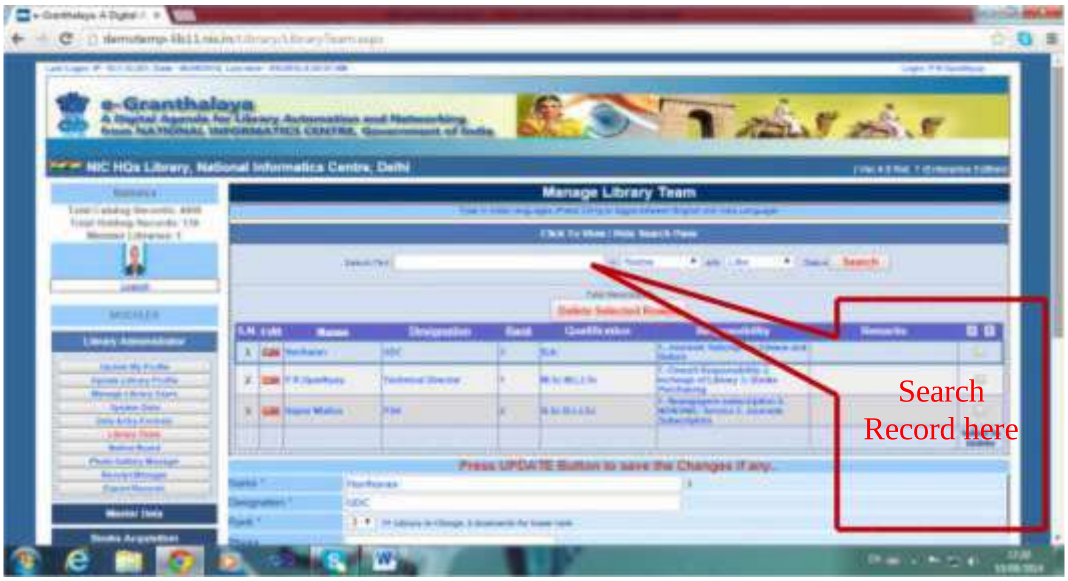
- Select Document Type from drop-down
- Selected fields will be displayed and UPDATE button will be visible instead of SAVE button
- Check / un-check the desired field
- Press UPDATE Button to save the changes

5.6. Library Team

This Form is used for entering the details of the Library staff which will be displayed on the OPAC page under Introduction part where details of the library staff will be displayed on pressing the button –'Library Team'. The purpose of the details is to provide name and other contact details along with their responsibilities of the library staff required by the library members. Click the link 'Library Team' on the left side of the page to load the form as shown below:

Search Records

On this form, you can search the existing records of the Library Team for which details were entered earlier. This can be done by pressing the '***Search Pane***' on the top of the form – which will slide down and will show various search parameters to be used to search the existing records. In case, no search parameter is selected and press SEARCH button – it will show all the records in the Result Grid. Once results appear in the Result Grid then you can EDIT / Print details of the selected Library Team member.



How to Create New Record?

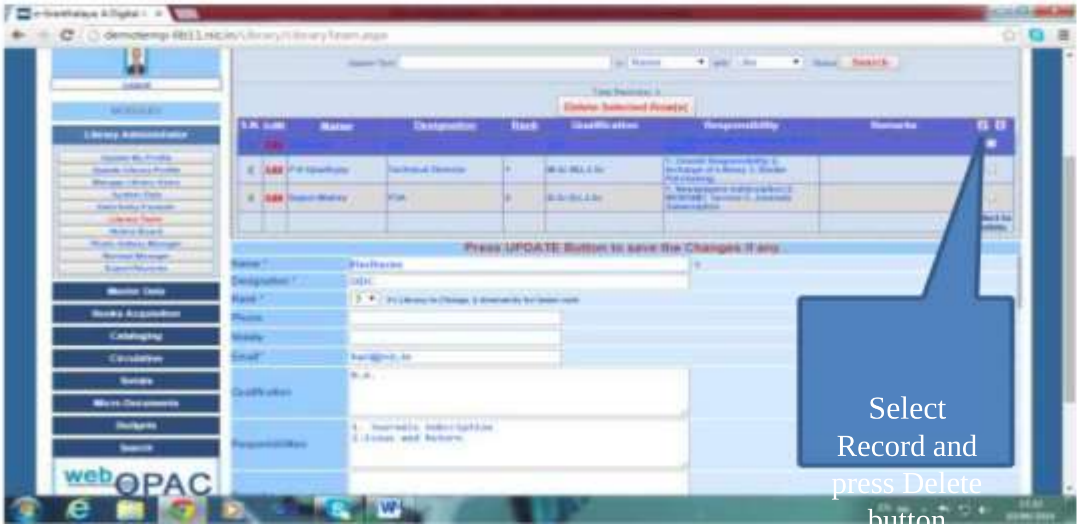
- Enter the details of every staff member in the given fields
- Mandatory fields are marked with * sign
- **Rank** – can be selected based on the hierarchy of Library Staff designation –wise. For example Rank 1 can be selected for Library in-charge and then down to the rack for other staff members.
- **Qualification and Responsibilities** – can be entered line wise by using bulleted format.
- **Select Language** – from drop-down on the top of the form for typing data in desired language and press Ctrl+g to activate the language. This feature is enabled only when net connectivity exists in the PC. Otherwise, other tools can be used for typing in local language.
- **Photo** – of the team member can be uploaded.
- **Press SAVE** – button to save the record.

How to Edit Record?

- Search the existing record under 'Search Pane' given on the top of the form
- Click EDIT button for selected record from result grid – it will fill the existing data of the team member
- Modify the data and press UPDATE button to save changes.

How to Delete Records?

- Search the record as mentioned above in the 'Search Pane'
- Select the Records you wish to delete either manually of all by clicking the image button given on the right top corner of the result grid
- Press DELETE SELECTED RECORDS button to delete records

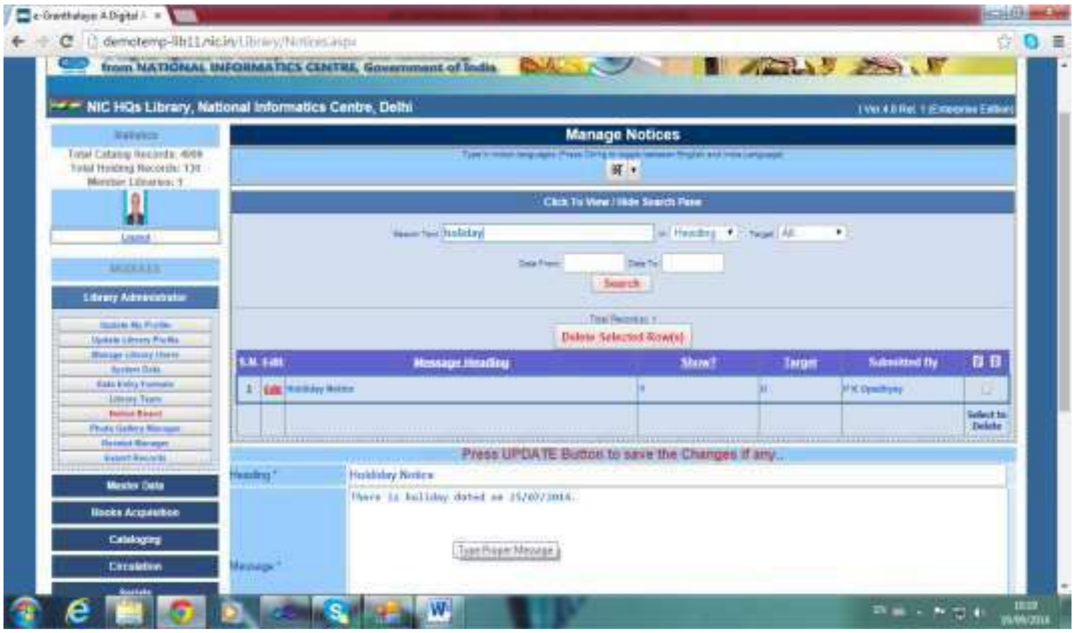


5.7. Notice Board

This form is used to manage the Notices which will be displayed on the application and will be visible to library staff / user of the software as well as to the members of the library during OPAC access. The notice may only be submitted by the Librarian/In-Charge, Library and Super User of the software. Later notice may be make hidden once the time of the notice is over by editing the Notice Record and by selecting NO value in the drop-down –'Show?'. The Notices Form may be load by clicking 'Notice Board' Button given under the module – LIBRARY ADMINISTRATOR. Following screen show the form:-

Search Records

Existing records of the Notices uploaded in the database can be retrieved with many of the parameters in 'Search Pane' of the form given on the top of the form. Main search parameters are any word or words which may exist in Heading or Message part of the record and / or with a target. Target means that the notice was uploaded for a). Software User – Library Staff or b). for Library members. In case you do not specify any parameter and press SEARCH button then all the records will be retrieved. Another parameter for search is the Date of Notice which is very useful. Once results are shown in Result Grid then you may do many tasks with the results. You may DELETE or EDIT the selected Record.



Add New Record

- Enter the details of the notice/message in the text boxes
- Select the 'Target' for whom you wish to upload the notice
- Select 'Show' value from drop-down to make the notice visible to the selected target during data entry / OPAC search
- Use Language of Typing from drop-down given on the top of the form. This utility works only when PC is having net connectivity.
- Press SAVE button to save the record.

Edit Record

- Search the existing record under 'Search Pane' – click to show/hide the 'search pane'
- Type the value in various search parameters and press SEARCH Button
- Results will be appear in Result Grid
- Press EDIT button for the selected record from the Result Grid.
- Modify the contents in the desired fields
- Press UPDATE Button to save the changes.

Delete Record(s)

After Searching of the Records as mentioned in the above heading, you may DELETE the Selected Record(s) from the Result Grid. For selecting all records – you may click 'All' tiny image on the right corner of the Result Grid. For selecting desired random records, click the check box given against each record in the right side of the Result Grid.

5.8. Photo Gallery Manager

This Form is used to upload the desired photo/images related with the library / organization and you wish to publish over OPAC interface of the application. The uploaded photo and images will be displayed over OPAC page under 'Photo Gallery' link of the OPAC. The uploaded photo can be stored in a particular folder/sub-folder to make separation and can also be deleted either all or selected.

Click the 'Photo Gallery Manager' link/button under LIBRARY ADMINISTRATOR module – following form will be displayed:

View uploaded Images

In case you have already uploaded images either in root folder or in a folder/sub-folder – you may see all the images uploaded so far. To view the images you need to expand the Tree View given on the top left corner of the form – click + sign to expand the folders, if any. Then click the Folder to view all its images – images thumbnail are displayed in the left side of the Image Viewer. To view a particular image you need to click the image which will be displayed in the Centre of the Image Viewer as shown in the above screen.

Create New Folder

To create new folder – type the name of the folder (without space between the name of the folder) in the text box and press CREATE FOLDER button. Now, folder will be created and will be visible to you under 'Tree View' +. Now you can upload the desired photo in any of the selected folder.

Delete Existing Folder

First select the folder from 'Tree View' by clicking over the name of the folder – the selected folder name will be displayed in the label. Press DELETE FOLDER Button to Delete the folder along with deletion of all the images uploaded in the selected folder

Upload Photo

First select the Folder (if not in the root) where you wish to upload photo. Then browse the photo from you PC or from LAN device. You can select / upload only one image at a time. Once photo is browsed then press UPLOAD PHOTO button. Once photo is uploaded- it is visible in the left side of the Image Viewer.

Delete Photo

You can delete photo from the Root or from any folder selected from 'Tree view' under + sign. Select 'ALL' photo or desired one and press DELETE PHOTO button to delete the photo from the folder.

NOTE: All the photo/images uploaded here on this form are not saved in the database, instead are saved in a PHOTO folder under your application root directory.

5.9. Receipt Manager

This Form is used to manage the Receipts of the amount received for various purposes in the library viz. Membership Fee, Renewal Fee, Fine Charges or against loss of books. The receipt records are created automatically during return of the book if fine is due by selecting 'Create Receipt' check box. For other kind of receipts, you may create the new record manually by typing the details here on the form. You may also create receipt record for partial payment where status of such record will be marked as 'Pending' which you may later any time can update and receive full amount.

Status of Records:

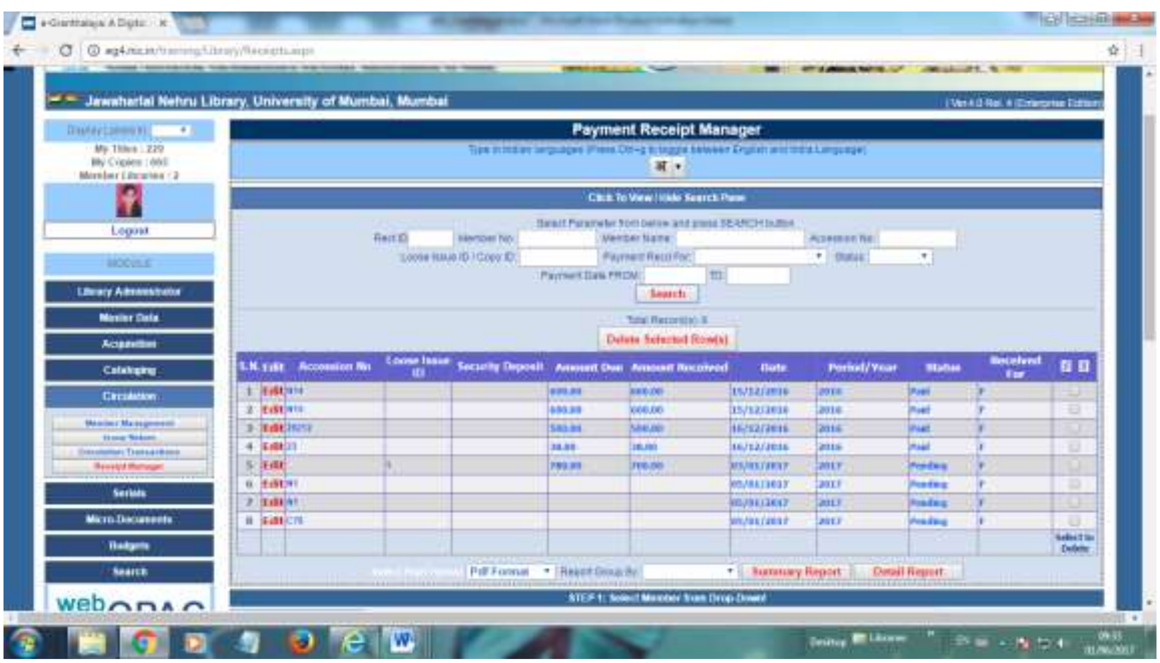
Pending – where full amount not received

Paid – Where full amount taken

Click the link / button – 'Receipt Manager' under LIBRARY ADMINISTRATOR module, following form will be displayed:

Search Existing Records of the Receipts

You can search the existing records of the Receipts in the 'Search Pane' here given on the top of the form. Click 'Hide/View Search Pane' to expand it downwards – you can search the records by giving value for various search parameters given there. Press SEARCH button to see the results in Result Grid. In case you do not specify any parameter and press SEARHC button – it will show all the records. Once results are seen in the Grid then you may perform various tasks with the selected Records such as Deletion and EDIT of the selected records.



Create New Receipt

You can create new record here for any kind of receipt of payment in the library where some amount is being received from registered for –

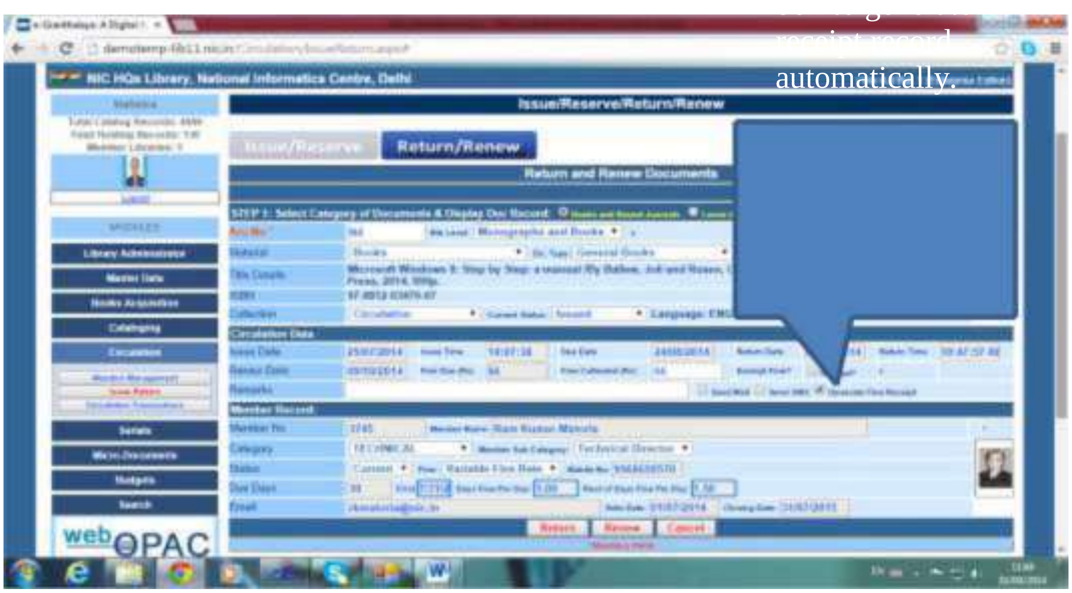
- New membership fee
- Renewal Fee
- Amount charged for loss of book
- Security Deposits
- Any other payment

<u>Steps:</u>

- Select the Member Name from drop-down. It means you can generate the Receipt record only for registered member in 'Members Registration' form under CIRCULATION Module.
- Enter Date of Payment in 'dd/MM/yyyy' format
- Select the Reason for payment – various options given in the drop-down e.g. New Member, Renewal, Overdue fine, Lost/Damage of books, Security deposits and Others.
- Enter Amount in Rupees being received from member
- Select Payment Mode (Cash/Cheque/Electronic Transfer/Others)
- In case receipt is for 'Loss/Damage of Books' then select Accession No from drop-down or select Item ID if it is for loss of Loose issues of journals.
- Press SAVE button to save the data

Receipt for Overdue Fine

A new record will be created automatically during RETURN of the book in CIRCULATION Module if any Fine is due. For this purpose a check box is given on the RETURN Form with the text –"Generate Fine Receipt" as shown in the below screen:



- Check the Check box 'Generate Fine Receipt' – this can be done only when overdue fine exist during return of the book.
- Type the Amount being taken during return of the book.

- If fine taken is equal to Fine overdue then status of the record will be marked as 'Paid' otherwise records will be saved automatically with 'Pending' Status. The records with 'Pending' Status can be searched later in the 'Receipt Manager' from and rest of the amount can be taken later with the full amount entered in AMOUNT DUE text box – Such record can be edited and once record is edited here with Full amount the status of the record will become 'Paid'. You can Edit such record as given below:

Edit the Receipt Record

You can edit the selected record from the Result Grid under 'Search Pane' when results appear in the Grid.

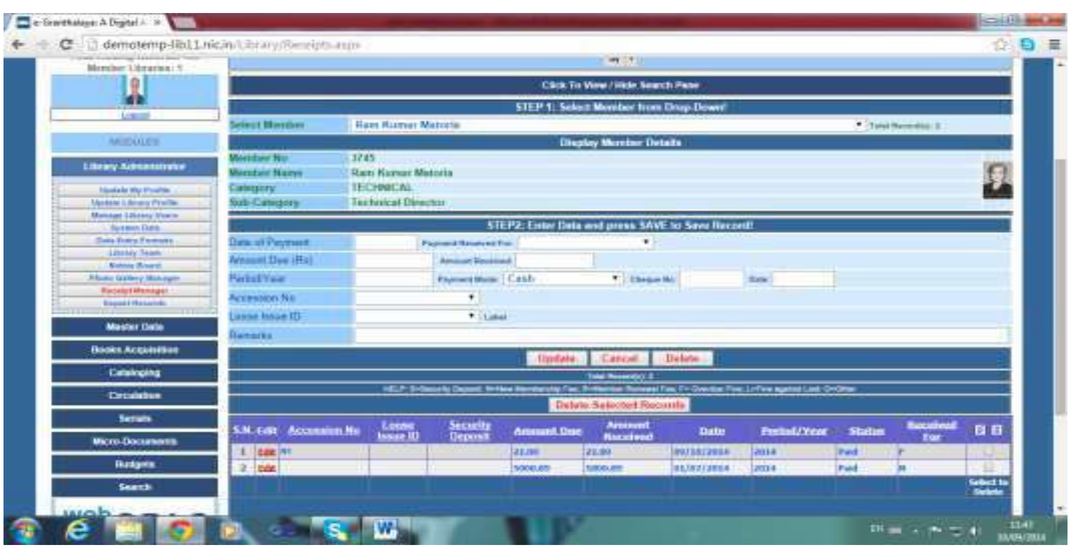
- Press EDIT button from the Grid of the selected Record.
- Type / modify the data in the text boxes.
- In case any record is with 'Pending' Status due to the fact that less amount was received earlier during return of the book then you need to type the Full amount in the text box.
- Press the UPDATE Button to save the changes.

Delete Records

Selected Records can be deleted either from the Result Grid under Search Pane – here you can select all/few records at a time and press DELETE SELECTED RECRODS button to delete all the selected records. Also, during editing of the record – you may delete single displayed record by pressing DELETE Button given on the bottom of the screen.

<u>NOTE</u>: Once you select the Member from drop-down – all the receipt records of the selected member is displayed in another Grid at the bottom of the screen. Here you can perform the Deleting / Editing task for selected record(s).

<u>NOTE</u>: Those Records which are with status "Pending" means that you have not taken full amount which was due. Such Records can be edited and get full amount and press UPDATE. Once you take full amount and process the record then status will be changed to "Paid".



Generate Reports

Various kinds of reports of receipt taking can be generated on this form under 'Search Pane' or by selecting Member Name from drop-down. The Reports can be saved in various formats where total amount is reflected in all the reports.

5.10. Export Records

This form is used to export the records (Cataloging and Holdings only) of your library holdings in any of the standard format like CSV / MARC21 / MARCXML / ISO:2709 / EXCEL, etc. The exported data can be used to import these records in any other database / application. The form does not provide the facility to export Members records – such facility is available in the Members Registration Form under CIRCULATION Module.

You can load the EXPORT Form by clicking the link / button – 'Export Records' under LIBRARY ADMINISTRATOR module of the application, see below screen:

How to Export Records?

- Search the records by using various search parameters given on the top part of the form. These parameters are :-
  - Search Monographs and Books / Serials – select the option
  - You can search 'All Records'
  - Can Search 'Random Accession No' just by typing in the appropriate text box in the manner – e.g. N1; N3; N345; 345; 890..so and so forth. Use semicolon between two Nos.
  - Can search by 'Range of Accession No'
  - Can use 'Range of Accession Date' in dd/MM/yyyy format
  - Can select a particular 'Acquisition Mode'
  - Similarly can search by a particular 'Section / Location / Class No / Copy Status etc.
- Press SEARCH Button to get results in the Grid

- Select ‘Export Format’ from drop-down
- Press EXPORT SELECTED RECORD Button to save the file .

NOTE: You must export few thousand Records at a time otherwise much time may be taken in case more records are exported at a time.

Print Holdings Records

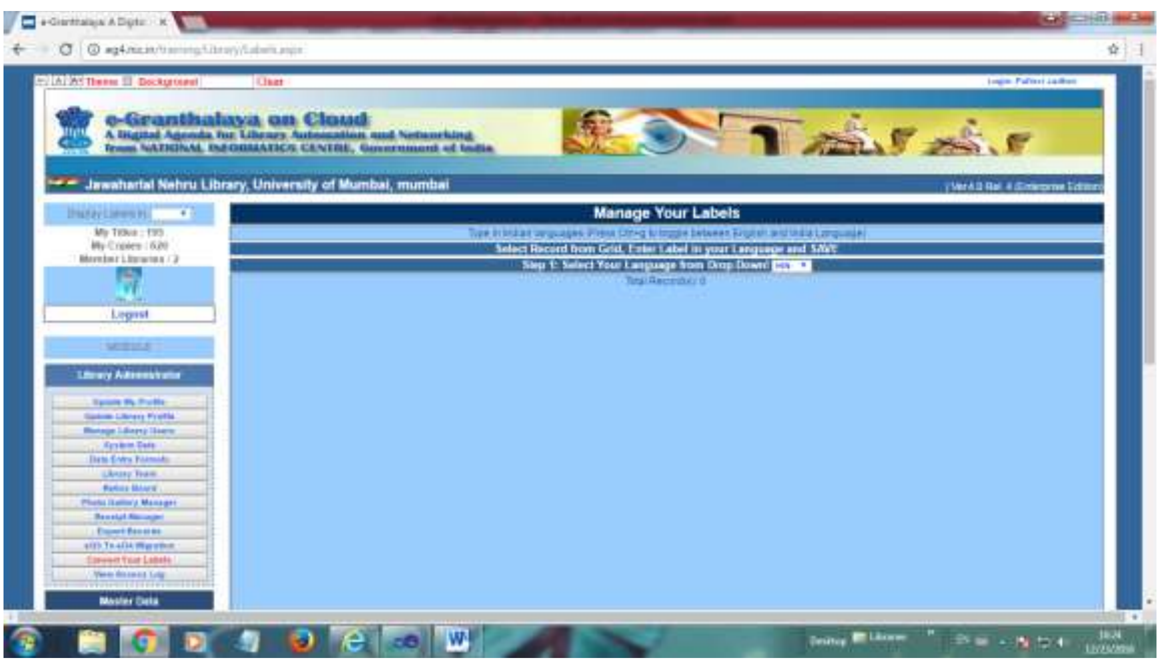
This form can also be used to generate various reports in many formats such as PDF/DOC/HTML. Three kinds of reports viz. Compact/Summary/Detailed can be generated for various purposes. The reports can be ‘GOUPED’ by various Fields by selecting the value from ‘Report Group By’ drop-down. This will generate the same reports order by various fields selected from Group By drop-down.

5.11. Convert Your Labels in Your Language

eG4 provides facility to display all the Labels/Tags in the application in your own language. By Default all the Labels are displayed in ENGLISH, however, in case you wish to get display all the labels in local language then your need to create corresponding labels in your language and save all these in this form. This activity will be done once only.

How To Create Local Labels

Select the desired language from drop-down and then all the English labels will be displayed where you need to type labels in your language and then SAVE/UPDATE all.



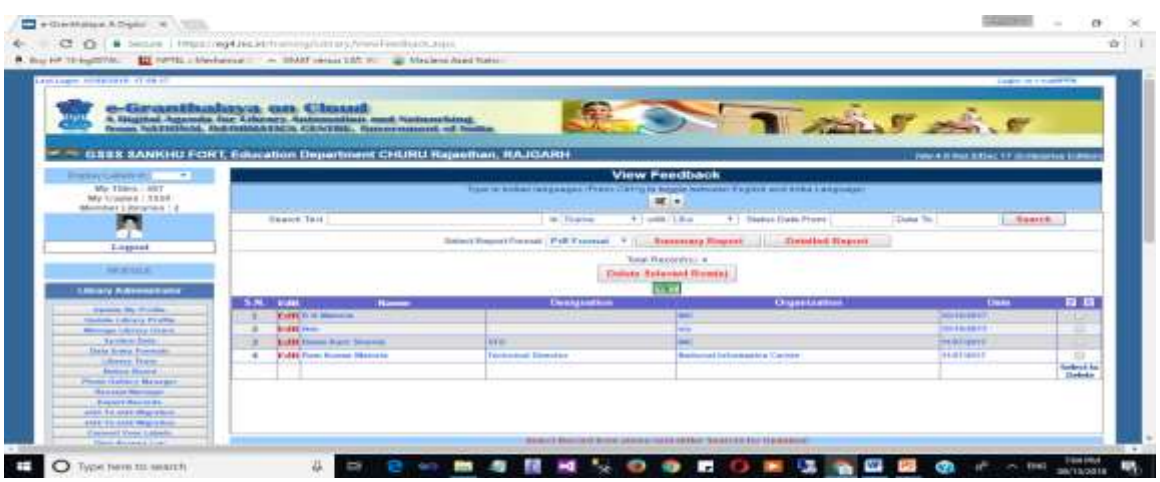
5.12. Access Log of Users/Visitors

This form provides provision to search/view the users Log and Visitors Log who visited after doing Login on the application. Whenever, any user login the application for data entry or any member login the OPAC for searching then a Log is saved in the database. Two kinds of visitors: - For Data Entry and OPAC.

5.13. View Users Feedback

This Form is used to view the feedback submitted by the users and visitors of the site. The Library Administrator can update the Feedback and submit the Answer which will be shown on OPAC page. Library Admin can also hide or view the feedback submitted. If hide- the feedback will not be displayed on OPAC page. Feedback submitted may also be deleted.

- Press Search button to get Feedback Records in Grid
- Then other tasks can be performed.

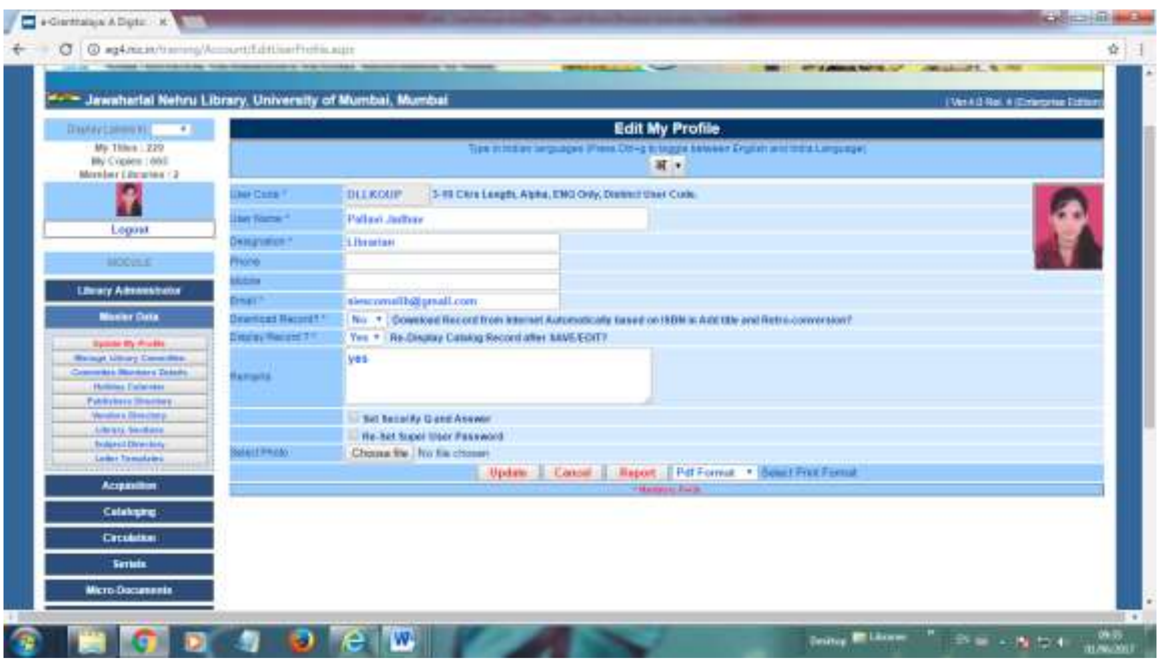


Chapter 6
Master Data Module

This Module is used to update various master tables containing the global data which will be used in subsequent modules of the software. These master tables are updated before starting the data entry of the books. However, few of the master tables are not required to be updated separately. Like PUBLIHSERS Table will be updated automatically during data entry of books where Publisher details will be saved in this table from other modules.

The master data modules consists of the following master data:-

- Update User Profile
- Manage Library Committee
- Manage Library Committee Members details
- Holiday Calendar
- Publishers Director
- Vendors Directory
- Library Sections
- Subject Directory
- Letter Templates

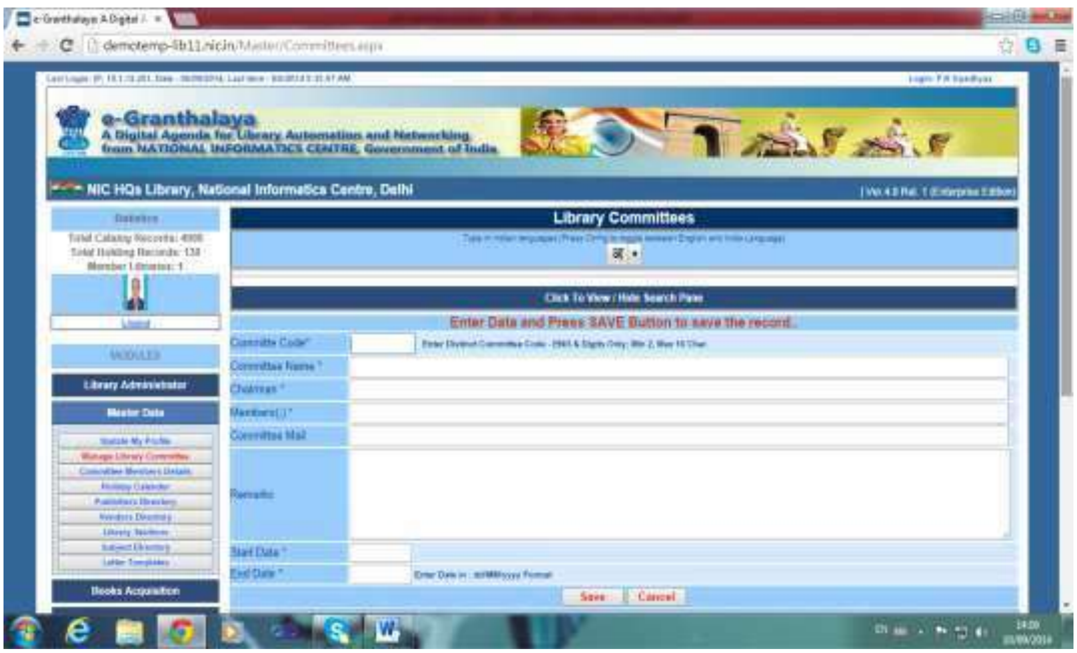


6.1. Update Profile

This Form is used to Update the User Profile who has login the software for data entry. For details you must read the Chapter 5: Library Administrator.

6.2. Library Committee

This form is used to manage the Library Committee details required for sending approval in the Books Acquisition and Serials Modules. There may be various committees in a library with different roles and period. This form can be loaded by clicking the link / button – 'Manage Library Committees' given under MASTER DATA Module. On this form you can Add New Committee, can Edit existing committee details and can Delete the Committee, however, it is advisable not to delete the Committee Records if the committee has approved books and their reference is saved in the Acquisition Table of the database.



Search Existing Records

Existing records can be searched under 'Search Pane' – click the 'Hide/View Search Pane' given on the top of the form – it will slide down and will show all the records already saved in the database. You can perform various tasks such as Delete Records by selecting the records from the Result Grid and pressing the Delete Button. Also, you can modify the selected record by pressing the EDIT button.

Add New Committee

- Type the unique Committee Code e.g. LIBCOM1 , COM1, etc. It must be in ENG only
- Enter Committee Name
- Members and Chairman details
- Start Date and Closing date of the committee
- Mandatory Fields are marked with * sign
- You may type the data in local language by using the built-in utility by selecting the language from drop-down given on the top of the form and pressing the Crl+g.
- Select Date from Date Picker or enter date in dd/MM/yyyy format
- Press SAVE to save the record.

Edit Record

You may edit existing record by selecting the record from 'Search Pane' after search and press EDIT button. The details of the selected record will be displayed in the fields, change the desired field and Press UPDATE button to save the record.

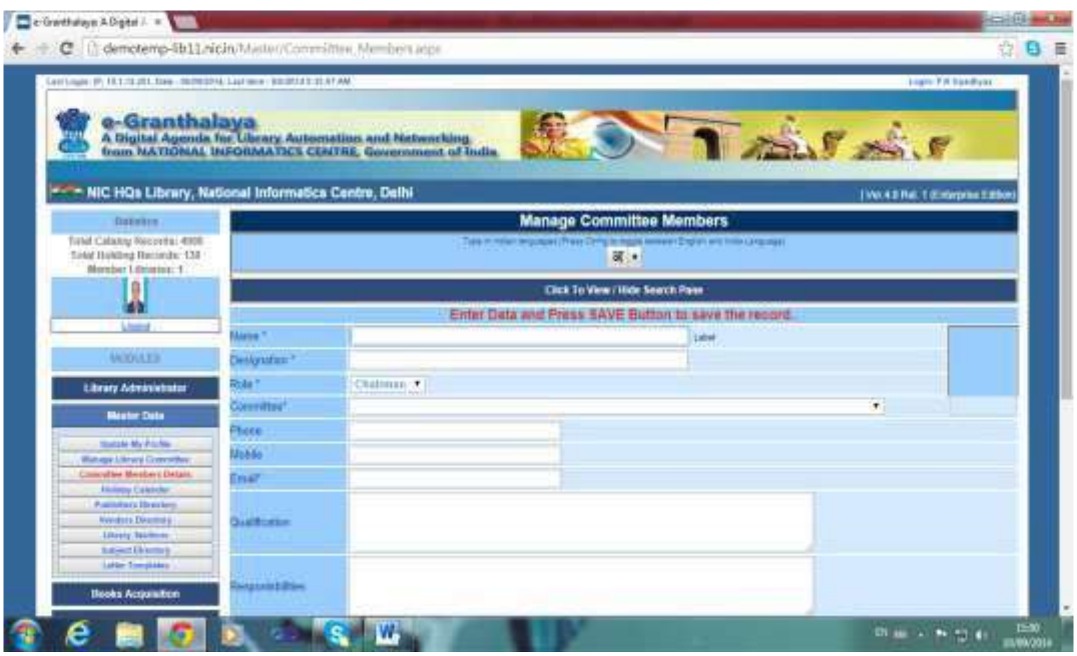
NOTE: Library Code can not be changed later. Also, once you started use of Library committee for Purchasing approval then you must not delete the committee records.

Delete Record

You can delete newly added records from 'Search Pane' after performing the Search there. Please do not delete Committee Records if you have saved their reference in any of the approval record.

6.3. Library Committee Members

This Form is used to manage the details of the Committee Members. The details of the committee will not be used in any module of the software, rather will be displayed on Introduction page of the OPAC interface for library members. The form can be loaded by clicking the link/button –'Committee Member Details' and following form will be displayed:



Search Records

You can search existing records of the committee members which were saved earlier. Records can be searched under 'Search Pane' given on the top of the form and slide down once you click the button text – 'Click to View/Hide Search Pane'.

- The records can be searched by typing the word(s) along with other parameters
- Select the Boolean operators, if any from the drop-down
- You can type the searching word in local language by using built-in utility on the top of the form
- Press SEARCH button
- In case no search parameters are used and press search button – all the records will be displayed in the Result Grid.
- Once results appear in the Grid then you can perform various tasks for selected record Like Deletion and Editing.

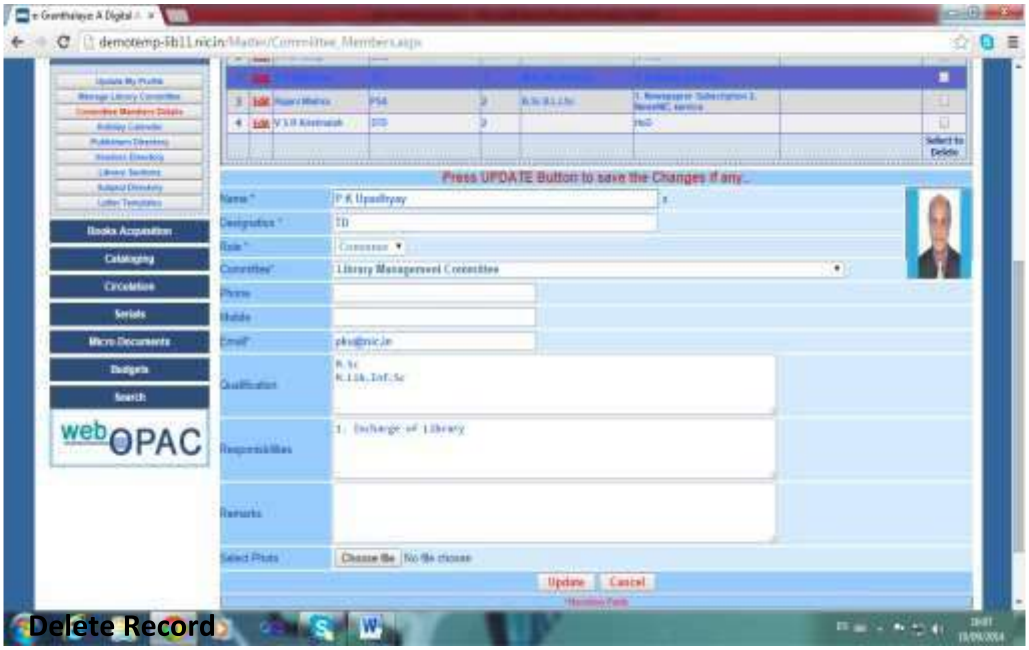
Add New Record

To add record for committee members, follow the steps:-

- Enter details of the committee member
- Select the Role from drop-down (Chairman / Member / Convenor, etc.)
- Mandatory fields are marked with * sign
- Data can be typed in local language by selecting the desired input language from drop-down on the top of the form
- Upload the photo of the member
- Press SAVE button to save the record.

Edit Record

- Search the existing record under ‘Search Pane’
- Press EDIT link button for the individual record from Result Grid
- On pressing EDIT – details will be filled in the fields
- Modify the details and press UPDATE button to save changes



Delete Record

- Search existing record(s) under ‘Search Pane’, use search parameter if required.
- Select the record(s) from the result to be deleted
- Press “Delete Selected Record(s)” button to delete

6.4. Holiday Calendar

This form is used to enter the Holidays of an year which will be taken into consideration while calculating Overdue Fine for late Return of the book. The date which will be saved in the database will be skipped for calculation of the fine, if any.

The Form can be loaded by clicking the button – ‘Holiday Calendar’ – following form will be displayed:

Search Records

You can search and view the existing record year-wise if already saved in the database. This can be done under the 'Search Pane' – it will slide down the pane

- Select Year from drop-down – dates will be shown
- You can perform various tasks with the results – can delete the selected dates

Add New Record

- Click the date shown on the calendar.
- You can change the Year/Month by clicking < > sign
- Current month will be displayed in default on load of the calendar
- Press SAVE button to save the added Records
- You can select first multi-dates and can save at one click

Edit Record

- Search the existing record under 'Search Pane'
- Press EDIT link button for the individual record from Result Grid
- On pressing EDIT – details will be filled in the fields
- Modify the details and press UPDATE button to save changes

Delete Dates/Records

- Search the saved record under 'Search Pane'
- Select the Record(s) and press 'Delete Selected Row(s)' button

6.5. Publishers Directory

This Form is used to manage the Publishers details required during the data entry of Titles of the documents. However, there is no need to add the new record here on this form as the new records for publishers are created automatically during data entry of documents in other modules of the application.

Search Records

- Records for existing publishers can be searched under 'Search Pane' given on the top of the page.
- Click 'Click to View / Hide Search Page' text on the top of the page
- Enter word(s) / Search string along with other search parameters
- Press SEARCH button to get results
- Once results appear in Result Grid then you may perform various tasks for the selected records.

Add New Record

- Enter the details of the Publisher
- Mandatory fields are marked by * sign
- For typing data in local language – use built-in utility given on the top of the form by selecting desired language and press Ctrl+g to activate it.
- Press SAVE Button to save the record

Edit Record

- Search the existing record under 'Search Pane'
- Press EDIT link button for the individual record from Result Grid
- On pressing EDIT – details will be filled in the fields
- Modify the details and press UPDATE button to save changes

Delete Records

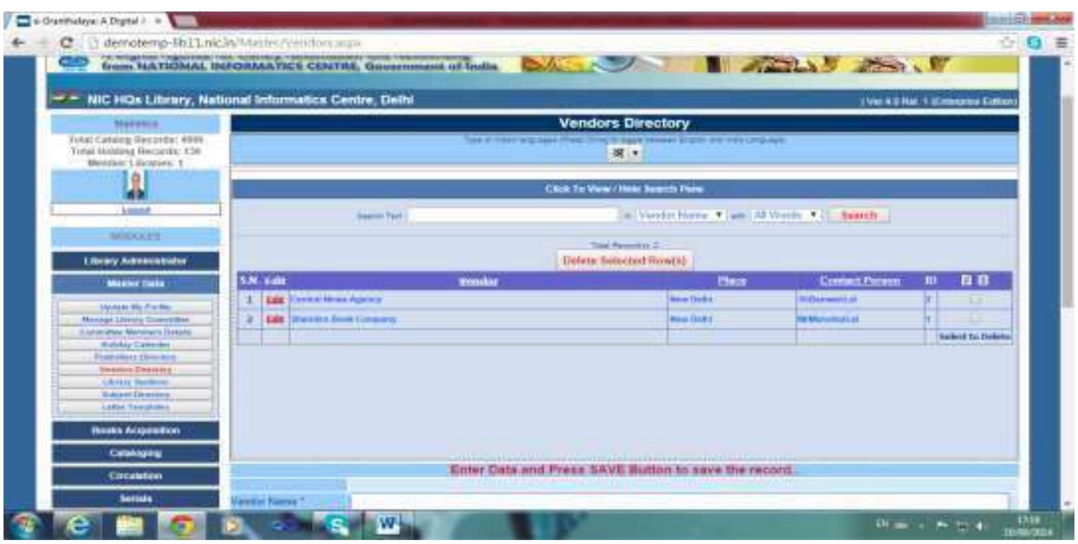
- Search Publisher Records under 'Search Pane'
- Select the record(s) from the Result Grid
- Press "Delete Selected Record" button
- If publisher record reference is saved in any of the cataloging record then record will not be deleted.

How to Print Publisher Bibliography

- Press 'Search Pane' given on the top of the form
- Press SEARCH Button to get all results
- Press 'Publisher Bibliography' button to generate report of bibliography
- Save the Report in desired format.

6.6. Vendors Directory

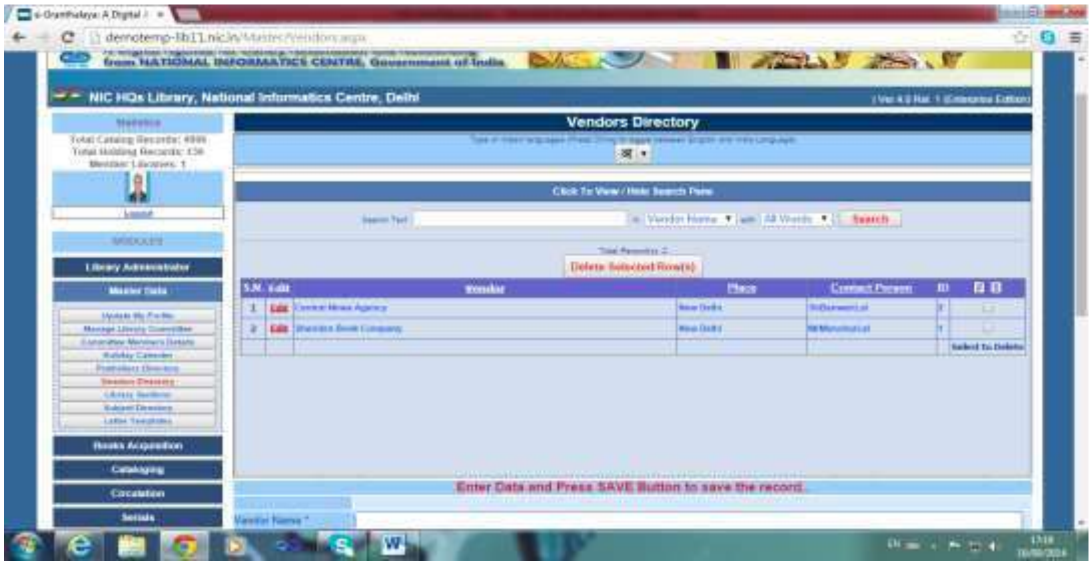
This Form is used to manage the Vendor details required during the use of Purchasing module of the software. The vendors records are essential to place the orders of books and serials, etc. To load the Vendor form click the button – 'Vendor Directory' under MASTER DATA Module.



Search Records

- Records for existing Vendor can be searched under 'Search Pane' given on the top of the page.

- Click ‘Click to View / Hide Search Page’ text on the top of the page
- Enter word(s) / Search string along with other search parameters
- Press SEARCH button to get results
- Once results appear in Result Grid then you may perform various tasks for the selected records.



Add New Record

- Enter the details of the Vendor
- Mandatory fields are marked by * sign
- For typing data in local language – use built-in utility given on the top of the form by selecting desired language and press **Ctrl+g** to activate it.
- Press SAVE Button to save the record

Edit Record

- Search the existing record under ‘Search Pane’
- Press EDIT link button for the individual record from Result Grid
- On pressing EDIT – details will be filled in the fields
- Modify the details and press UPDATE button to save changes

Delete Records

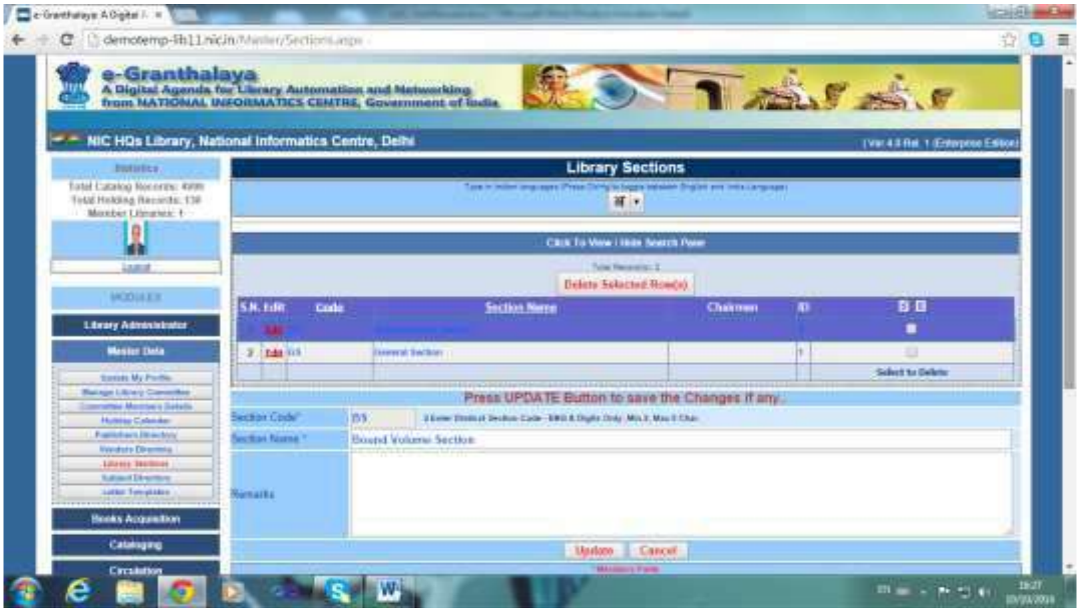
- Search Vendor Records under ‘Search Pane’
- Select the record(s) from the Result Grid
- Press “Delete Selected Record” button
- If Vendor record reference is saved in any of the Purchasing record then vendor record will not be deleted.

How to Print Vendor Bibliography

- Press ‘Search Pane’ given on the top of the form
- Press SEARCH Button to get all results
- Press ‘Vendor Bibliography’ button to generate report of bibliography
- Save the Report in desired format.

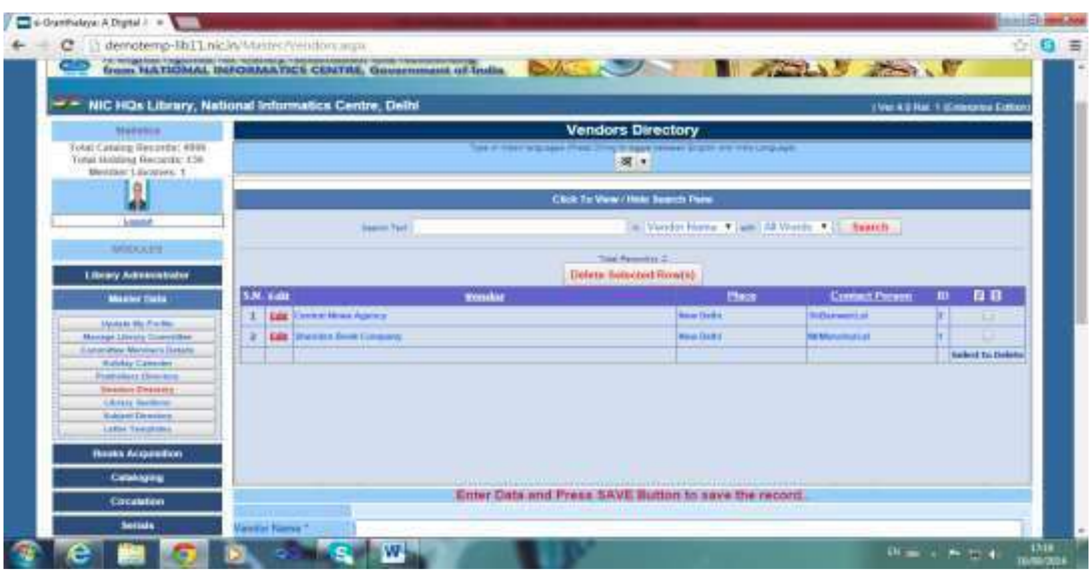
6.7. Library Sections

This Form is used to manage the Sections in the Library. Before starting data entry in the software, library needs to create sections records accordingly. During addition of copies of a book, user will need to select the section where copy of the book will be shelved. Later, based on sections, list of books can be generate in search module. To load the Vendor form click the button – 'Library Section' under MASTER DATA Module.



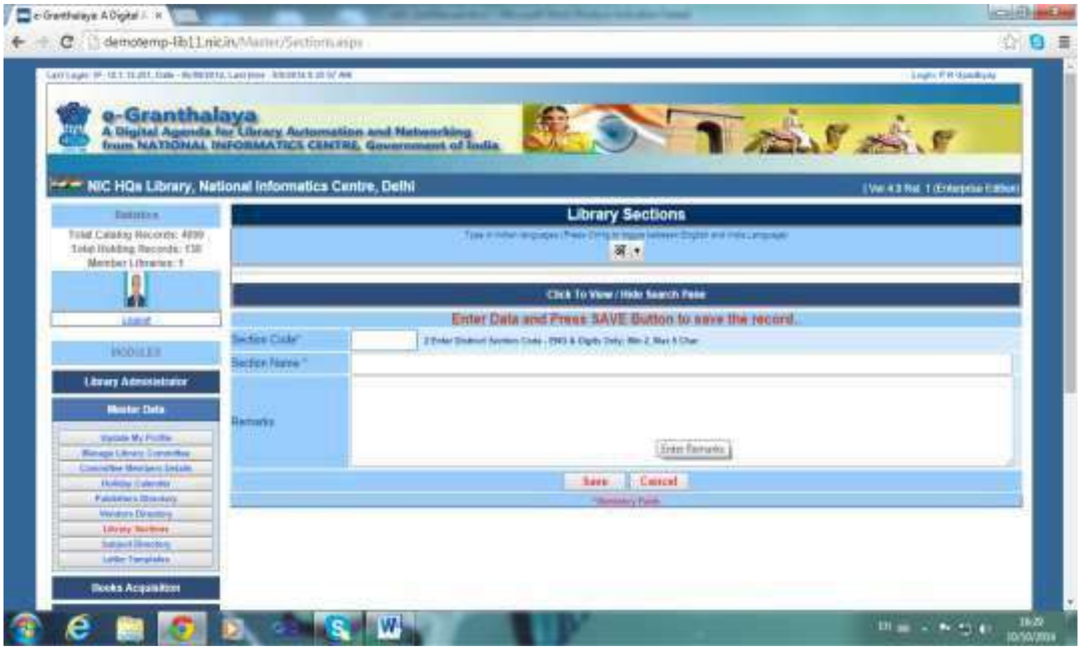
Search Records

- Records for existing Library Sections can be searched under 'Search Pane' given on the top of the page.
- Click 'Click to View / Hide Search Page' text on the top of the page
- Enter word(s) / Search string along with other search parameters
- Press SEARCH button to get results
- Once results appear in Result Grid then you may perform various tasks for the selected records.



Add New Section

- Enter the details of the Section in the text boxes
- Mandatory fields are marked by * sign
- For typing data in local language – use built-in utility given on the top of the form by selecting desired language and press **Ctrl+g** to activate it.
- Press **SAVE** Button to save the record



Edit Record

- Search the existing record under 'Search Pane'
- Press EDIT link button for the individual record from Result Grid
- On pressing EDIT – details will be filled in the fields
- Modify the details and press UPDATE button to save changes

Delete Records

- Search Section Records under 'Search Pane'
- Select the record(s) from the Result Grid
- Press "Delete Selected Record" button
- If Section record reference is saved in any of the Purchasing record then vendor record will not be deleted.

How to Print Section Bibliography (List of Books in sections)

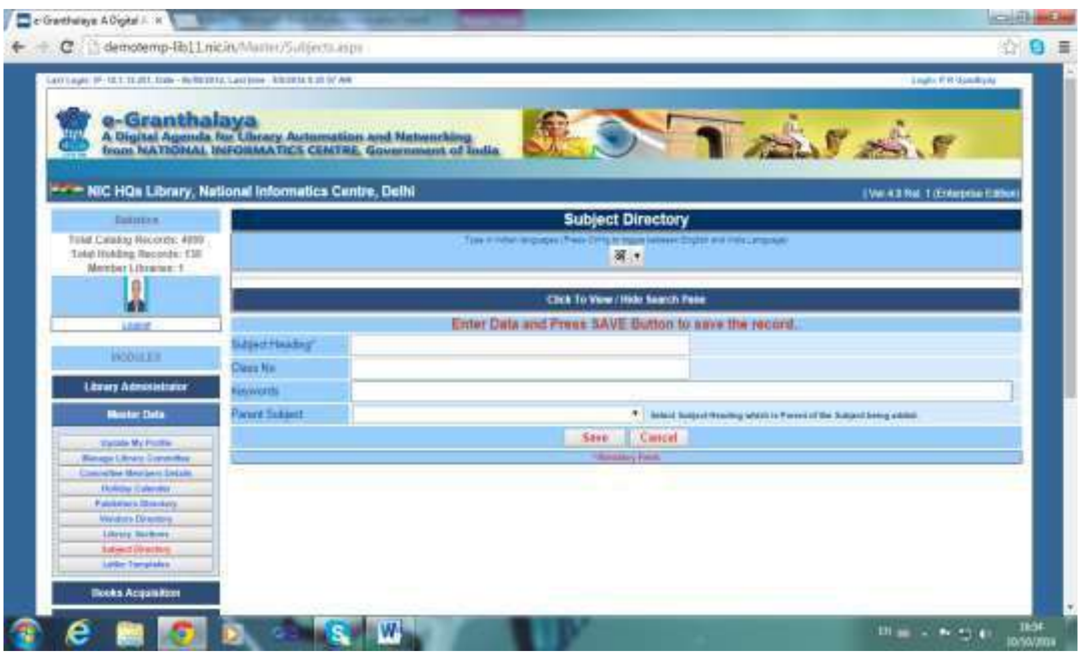
- Press 'Search Pane' given on the top of the form
- Press SEARCH Button to get all results
- Press 'Vendor Bibliography' button to generate report of bibliography
- Save the Report in desired format.

NOTE: These SECTIONS added here will be available for selection from Drop-Down in HOLDING part of the BOOKS ACQUISITION and RETRO-CONVERSION FORM during data entry.

NOTE: SECTION Field must always be selected/included in DATA ENTRY FORMAT so created in LIBRARY ADMIN Module.

6.8. Subject Directory

This Form is used to manage the Subject Heading List / Directory on which books are available in the Library. A library must use the Standard Subject Heading to represent subject of the collection. A standard tool for subject heading may be used to define the subject heading. Besides, related keywords may be added here with each subject heading which can be used to search the catalog based on either main subject heading or related keywords. The related keywords will be included in the KEYWORDS fields of catalog record. To load the Vendor form click the button – 'Subject Director' under MASTER DATA Module. Class No and Keywords saved here along with SUBJECT HEADING will be entered in Cataloging Records of the book when you will select the SUBJECT from drop-down.



Search Records

- Records for existing Subject Headings can be searched under 'Search Pane' given on the top of the page.
- Click 'Click to View / Hide Search Page' text on the top of the page
- Enter word(s) / Search string along with other search parameters
- Press SEARCH button to get results
- Once results appear in Result Grid then you may perform various tasks for the selected records.

Add New Record

- Enter the details of the Subject Heading / Class No, etc in the text boxes.
- Select Parent Subject as broader subject heading – it will present the subject tree in hierarchical manner and will be available for search Subject tree under OPAC.
- Mandatory fields are marked by * sign
- For typing data in local language – use built-in utility given on the top of the form by selecting desired language and press **Ctrl+g** to activate it.
- Press **SAVE** Button to save the record

<u>Example of Hierarchy:</u>

-SCIENCE

--CHEMISTRY

---ORGANIC CHEMISTSTRY

----IN-ORGANIC CHEMISTRY

-PHYSISCS

-BIOLOGY

Edit Records

- Search Record under ‘Search Pane’
- Press EDIT button from the desired record in the Result Grid
- Change the data
- Press UPDATE Button to save changes

Delete Records

- Search Section Records under ‘Search Pane’
- Select the record(s) from the Result Grid

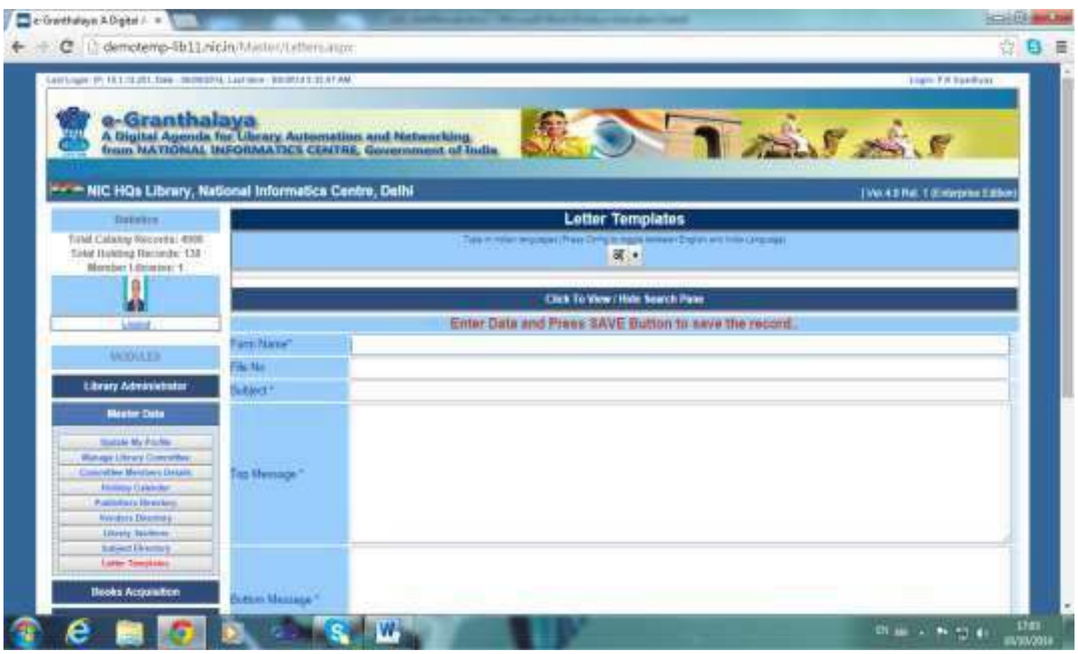
- Press "Delete Selected Record" button
- If Section record reference is saved in any of the Purchasing record then vendor record will not be deleted.

How to Print Subject Bibliography (List of Books – Subject Wise)

- Press 'Search Pane' given on the top of the form
- Press SEARCH Button to get all results
- Press 'Subject Bibliography' button to generate report of bibliography
- Save the Report in desired format.
- Select the record(s) from the Result Grid
- Press "Delete Selected Record" button
- If SUBJECT record reference is saved in any of the Cataloging record then SUBJECT record will not be deleted.

6.9. Letter Templates

This Form is used to create and manage various letters template / text which needs to be generated in other modules of the application. For example, you need to create a template for 'Reminder' where you can write the desired message in desired language. This form can be loaded on clicking the link button – 'Letter Template' under MASTER DATA Module.

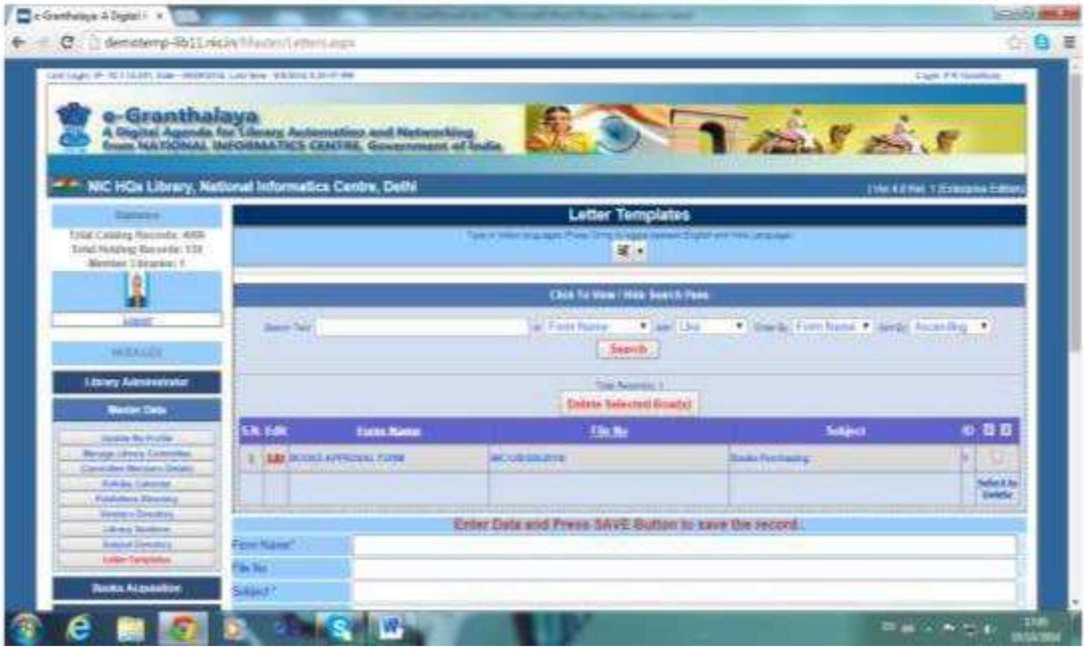


Search Records

You can search the existing letters which have been created and saved earlier. This can be done under 'Search Pane'

- Records for existing Letter can be searched under 'Search Pane' given on the top of the page.
- Click 'Click to View / Hide Search Page' text on the top of the page
- Enter word(s) / Search string along with other search parameters
- Press SEARCH button to get results

- Once results appear in Result Grid then you may perform various tasks for the selected records.



Add New Record

- Enter the details of the Letter Template with all the sections of the letter.
- Enter ‘Top Message’ and ‘Bottom Message’ in paragraphs, can be used bullet or any other formatin.
- Mandatory fields are marked by * sign
- For typing data in local language – use built-in utility given on the top of the form by selecting desired language and press **Ctrl+g** to activate it.
- Press **SAVE** Button to save the record

Edit Records

- Search Record under ‘Search Pane’
- Press EDIT button from the desired record in the Result Grid
- Change the data
- Press UPDATE Button to save changes

Delete Records

- Search Subject Records under ‘Search Pane’
- Select the record(s) from the Result Grid
- Press “Delete Selected Record” button

Chapter 7
Books Acquisition Module

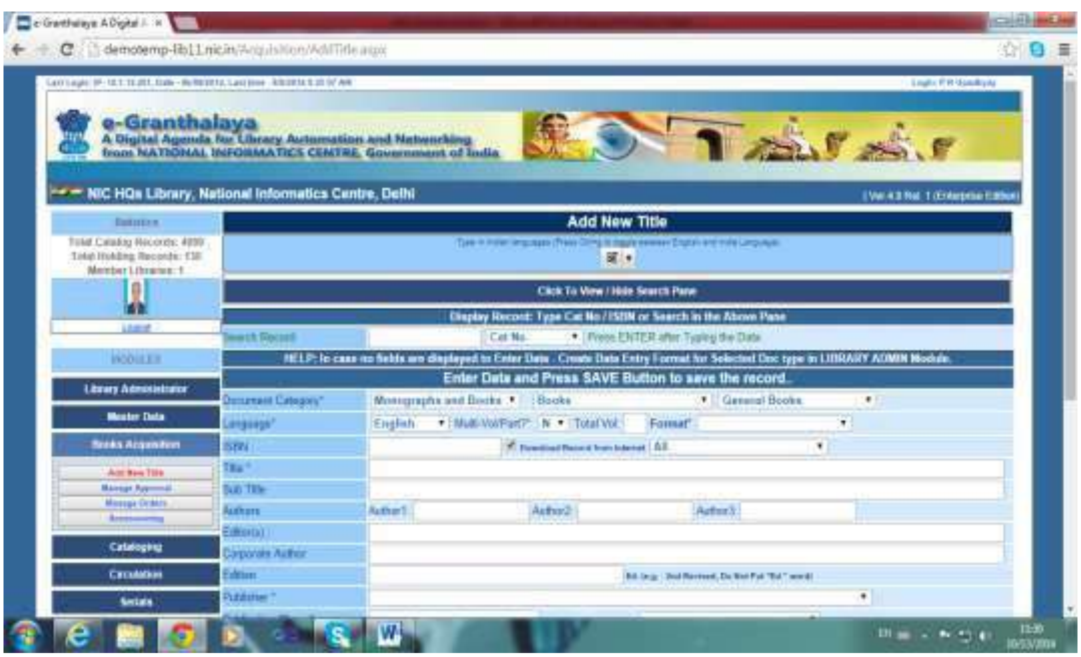
This module is used to automate the purchasing process of books in a library and it is an optional module where data entry of new books are done through various steps executed in this module. In case user does not want to use this module then data entry of books can be done direct in 'Retro-Conversion' Form under CATALOGING Module.

While using this module – user needs to use all the forms – one by one – to complete the purchasing process of the books, user can not skip any step. The following functions can be performed in the module:-

- Add New Title
- Manage Approvals
- Manage Orders
- Accessioning

7.1. Add New Title

This form is used to enter new titles of the book to be purchased under this module. Under this module, user can enter the details of the titles of Books and Monographs, Non-book Materials. For adding serials/magazines/periodicals details, user must use SERIEALS Module. This form can be loaded by clicking the link/button – 'Add New Title' under BOOKS ACQUISITION Module – following form will be loaded:



Search Existing Titles

Existing Titles of Books/Monographs and Non-book Materials can be search here under 'Search Pane' by specifying the search string/keywords in the search text box and by applying various search parameters like :-

Search in the Field – Select the Filed to be used for search
Boolean Operators – Use Like, And, Or, End With, Start with

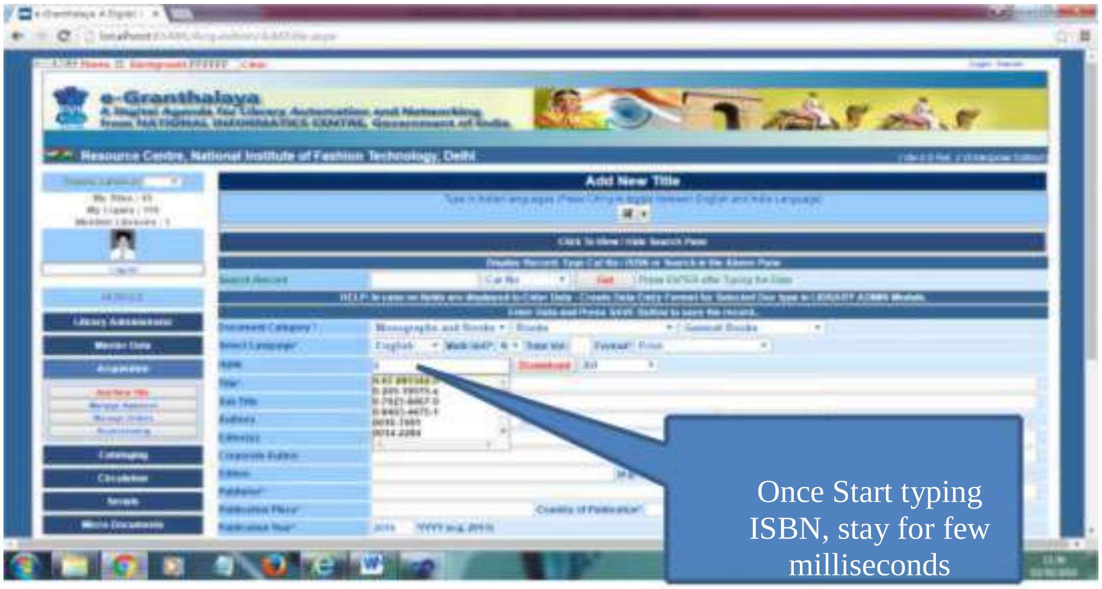
Result can be ordered by various fields. Once SEARCH button is pressed then results appear in the Grid. In case no search parameter is used and press Search button then all results will be appear in Result Grid. Once results appear then many of the task can be performed with selected record like – delete of Record, Printing the Result, Editing the selected Record, etc.

Besides, a catalog record can be displayed by entering the CAT NO in the "Search Record' Text Box – select the Filed where it is being searched and press ENTER. If record exists then the said record will be displayed in the corresponding form fields.

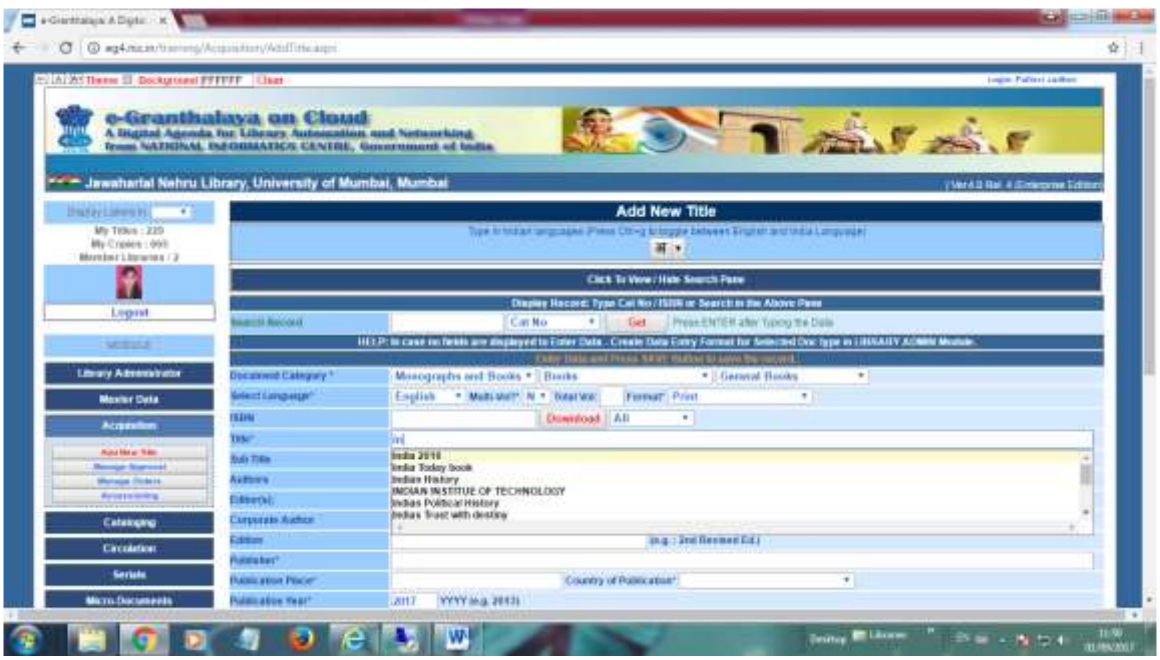
<u>NOTE</u>: Before starting of data entry in this form – you must create 'Data Entry Format' for all kinds of documents given under LIBRARY ADMINISTRATOR MODULE.

How to Find if Title Already Entered by Your Library or other libraries participating in the same cluster?

- ISBN Field: Once start typing ISBN No in the ISBN Text box – stay for few milliseconds, in case same ISBN already entered then it will be displayed – if it is there it means title already exists and then you can display the same title by searching it by its ISBN No under SEARCH Option

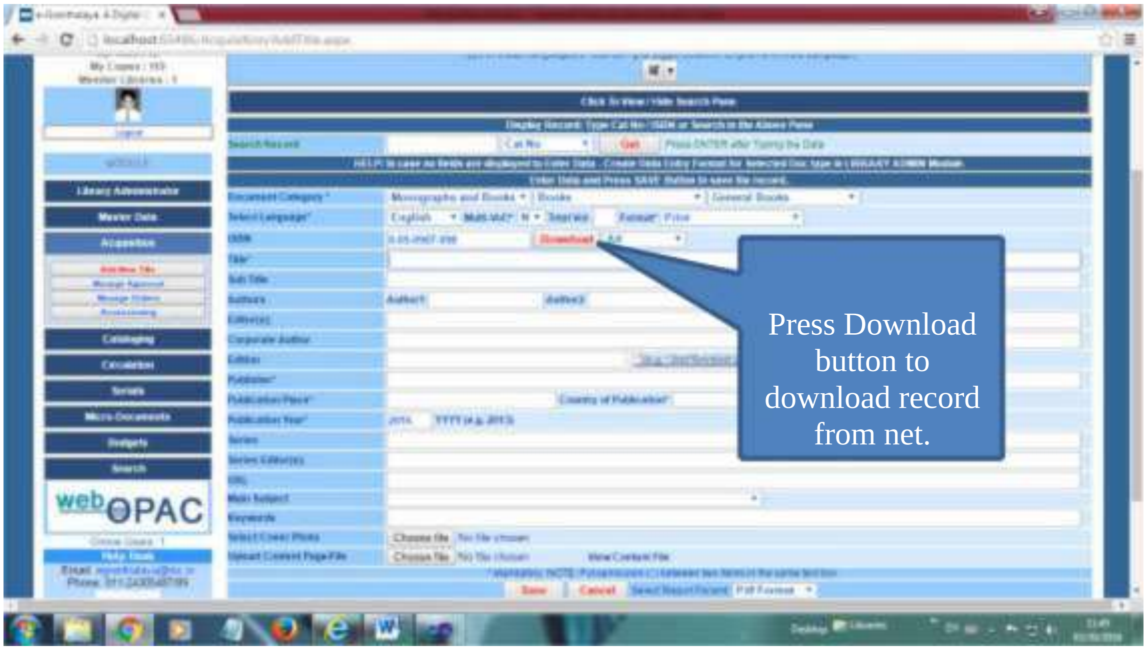


- **Title Field –**
  - Start Typing Title in TITLE text box
  - Wait for few milliseconds after typing first letter
  - If title already exists then you can select the Title from suggested Items
  - On selection of Item – its CAT NO will be written in SEARCH Text Box
  - Press GET Button to display the Title Record



How To Download Catalog Record from Internet?

- Enter ISBN No in ISBN Text Box
- Press DOWNLOAD button to download record from net (if exists somewhere)
- Correct the data if required.
- Press SAVE button to save the Record



Add New Title

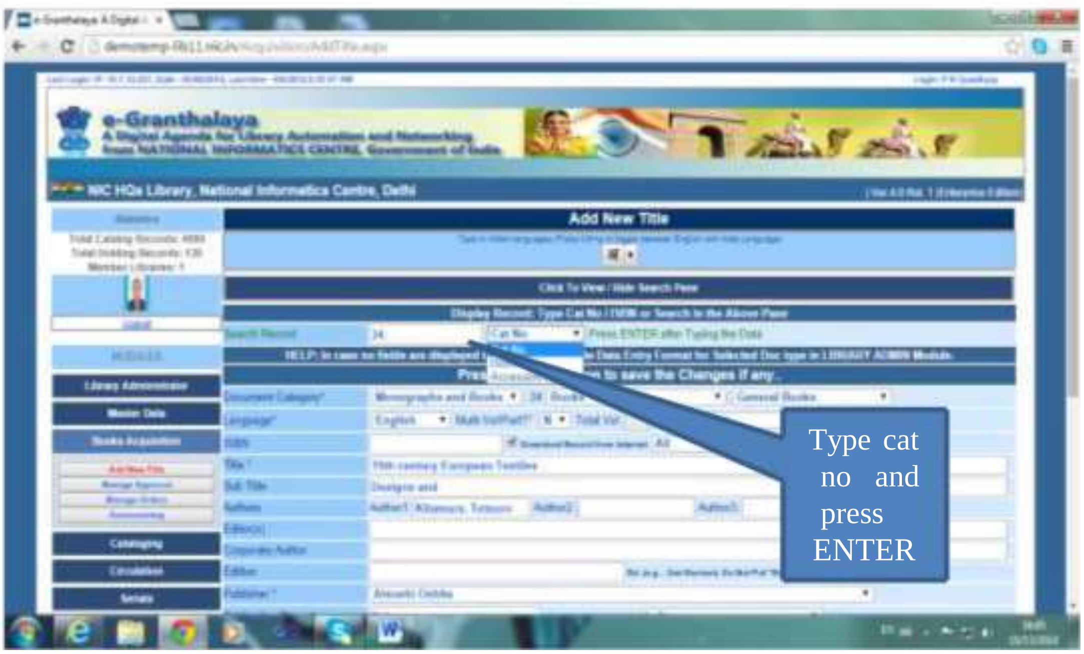
- Select Document Type from three drop-down – default type is always selected on load of the form. For example, in case you wish to create a new catalog record of 'Dictionary' type of document then you must select it from these drop-down.
- Select Language of the document from drop-down
- Select Value from 'Multi-Vol' / also select 'Physical Format' of the document – PRINT is the default format
- Enter ISBN No as printed on the book with "-" or without hyphen.
- In case, you wish to download catalog record of the book from internet then check the check box – Download Record. You can add this value in Library Profile also to automatic selection of this value. Once ISBN is entered and cursor is moved to next field – system will start searching of catalog record from net, if available.
- Enter data in the relevant fields for which data available in the book
- Mandatory fields are marked with * sign
- Data may be typed in local language by using the built-in drop-down given on the top of the form or by installing a transliteration software.
- The titles already entered will be viewed in the TITLE field based on matching the title
- Author names already saved in the database will be displayed automatically on starting the typing of the author name.
- Publisher Name if already exist in the directory will be selected automatically.
- Publication Place and Country are selected auto if already saved with selected publisher record
- Pickup main subject from drop-down. Related KEYWORDS are entered auto if already saved with the selected Subject Heading.
- Enter as many keywords as you wish, put semi colon ; between two KEYWORDS.

- Select cover photo by browsing the image file. Please make sure that size of the cover photo must be compressed and minimum to save the database space.
- Also, you can upload the 'Content' file of any format (pdf, images, text, doc, etc.) of the book which will be displayed with the catalog record over OPAC.
- Press SAVE Button to save the record- on saving a CAT NO will be generated which is regarded as Unique Record No. This is a permanent No and can not be re-generated manually if deleted. This is not linked with Accession no.

NOTE: CAT NO is used by the system to link the related Acquisition and Holdings Record and can be used to re-display the record for editing/deletion.

Edit Record

- Already saved record of book can be re-displayed for Editing just by selecting the record from Result Grid under 'Search Pane' or by typing the CAT NO or any other field and press ENTER.



- First Search the desired catalog record from database under ' Search Pane' using various parameters given there. Once Result appear then click "EDIT" button from the result and record will be displayed on the form for Edit.
- Also, You can display existing record by typing CAT NO / Accession No / ISBN No in the above shown screen and press GET button to display the record
- Modify the desired data
- Can Delete the Cover photo if already saved or Content file – by selecting the option given against these text boxes – 'Delete....."
- Press UPDATE to save changes

- The displayed Record can be saved as new Title if required by pressing 'SAVE NEW TITLE" Button – if edition is changed for example and you wish to add old title as new title.

How To Delete Record(s)

- Records can be deleted under 'Search Pane' in bulk by selecting all or few records from Result Grid.
- Single Record can also be deleted after display of the record and by pressing DELETE Button
- Those catalog records will only be deleted where no acquisition record/copy records added. In case, either purchasing record or copy records added for a book then first delete Copy records, if any and then delete Purchasing record and then you can delete finally Catalog Record.
- Once Catalog Record is deleted then related CAT NO is also deleted forever, will not be regenerated again by the system.

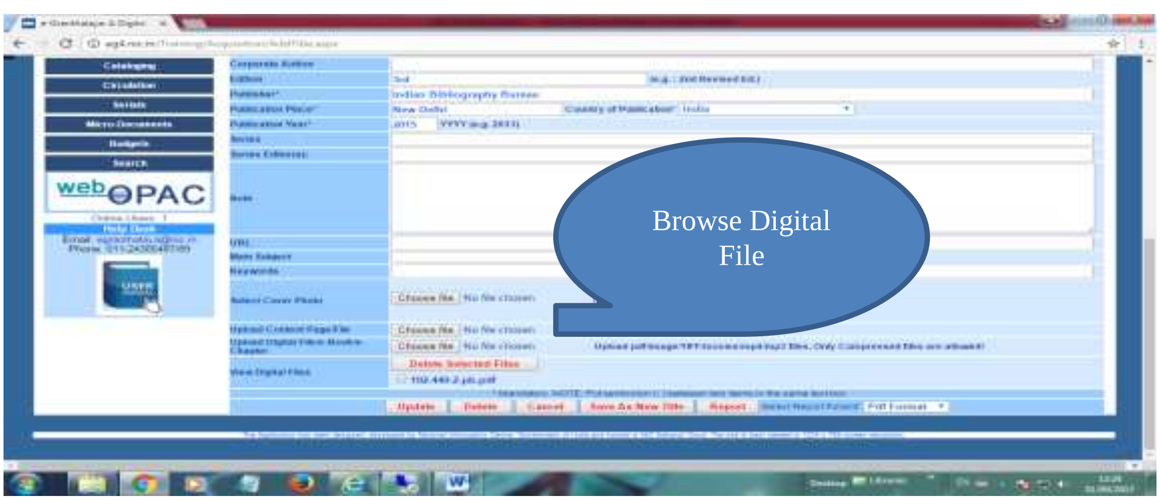
  NOTE: To delete Catalog Records – First you need to delete all its holdings and Acquisition Records.

  NOTE: In case, any TITLE is being used by other libraries in the cluster, or other libraries have added the Title in purchasing record or have added their holdings, in such situation – you can not delete the Title.

  NOTE: All Title Records entered by any participating library in the cluster, will be available for all, no separate title for separate library.

How to Upload Digital Files with Catalog Record

- Three kinds of Digital Materials can be uploaded with each Book (Catalog Record)- a). Cover Photo in Image Format, b). Content Page in pdf format and c). e-Books/Chapters digital files in pdf and other formats.
- These files can be uploaded by browsing the files and selecting from local hard drive / network drive.
- Once File is selected then on SAVE/UPDATE – the digital files will be saved on server pc.

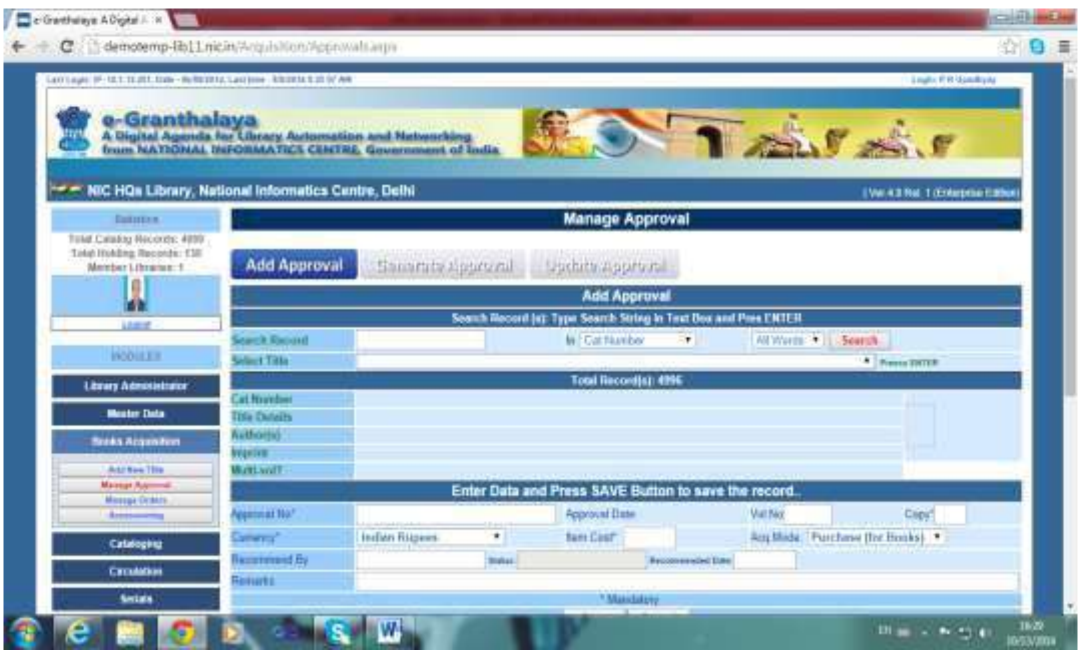


7.2. Manage Books Approval

This form is used to manage the Approval process where few steps are required to be complete during purchasing process of the book. The approval process starts by creating a Purchasing / Acquisition Record for each book for each purchasing. For example, a book is having 10 copies of it and has been purchased in a library three times – once 3 copies from different vendor, approved by different committee; 3 copies after few months/year from same/different vendor/committee and 4 copies once. In this way three purchasing records will be created whenever new purchasing is done for the same book. During purchasing of the book – following three steps are required to be completed on this form:-

a). Create a new purchasing record for every title with unique Approval No. However, same APPROVAL NO can be used for many titles in clubbed purchasing mode.
b). Generate Approval for Approval No in current purchase
c). Update Approval accordingly after getting approval from library committee.

The Approval form is loaded by Clicking the link button – 'Manage Approval' under BOOKS ACQUISITION Module, following form is loaded:



Three Tabs are there on the form containing three different part of the form – for each – Add Approval; Generate Approval; Update Approval.

Add New Approval

- Select the Title from drop-down to display the book record. You can 'Search Record' by many fields and by pressing SEARCH Button given on the top of the form

- Once catalog of the selected book is displayed then enter purchasing details in the relevant text boxes. Purchasing record for the selected title which already created/processed will be displayed in the bottom Grid just to show the old history of purchase.
- Mandatory fields are marked with * sign
- Enter Unique APPROVAL NO which has not been used before. Once an App no is processed then same app no can not be used for new purchasing.
- Enter No of copies being purchased
- Enter Vol No if book is multi-vol. In case a book is Multi-Vol then a separate Purchasing Record is created for each Vol.
- Enter Item cost on original currency
- Press SAVE Button to save the purchasing record
- This way create a separate Purchasing Record for each Vol/title with a same APP NO for purchasing many titles in the same purchase.
- Once purchasing record is saved – it will get displayed in the Grid at bottom which you can EDIT again to change the field value, if any. This can only be done before the purchasing record is processed further for next step – Generate Approval.

NOTE: On creation of new Purchasing Record Status will be 'Requested' Automatically. This status gets changed automatically with the next step.

NOTE: This way you can create new purchasing record for many titles to be submitted for approval, for example if you wish to submit say 100 titles for approval in the same list then create one record for each vol/title with the same APP NO.

Generate Approval

This tab/part of the form is used to process the Approval Records just added/created in the last step. To view the newly created purchasing record with Status – 'Requested' are displayed in the APPROVAL NO drop-down.

To process these records – follow the steps below:

- Select APPROVAL NO from drop-down
- Purchasing records with the status – 'Requested' will only be available in this drop-down. Once record is processed for further step – it will not available for selection here
- On selection of the APP NO – its title records are displayed In the bottom Grid.
- Select Committee to which list of approval / titles will be sent for approval.
- Press the PROCESS Button
- On processing – Status of these purchasing records will become – 'Sent for Approval'

Print Approval List – Once records are processed as above then user can take the print of the approval list as given below:

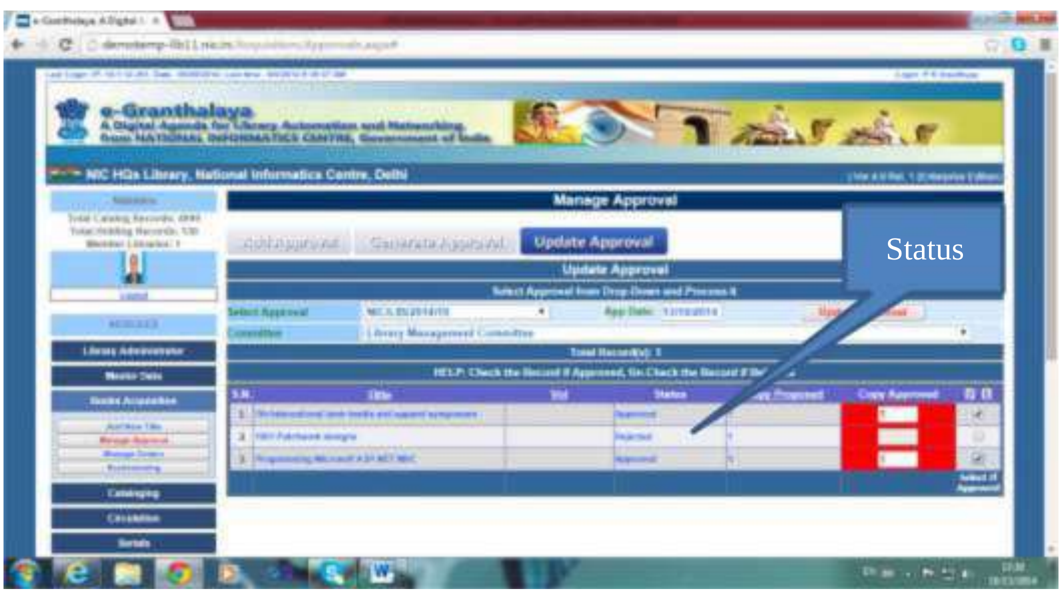
- Select Print format (PDF/DOC)
- Select Letter Template – if not available then create a letter/Report Template under MASTER DATA Module.
- Press PRINT APPROVAL Button to generate list.
- List can be printed or saved for later use
- The approval list must be sent to the Library committee for approval/rejection of the title purchase. Once file of approval come back then you need to UPDATE same approval as given in the below part.

Update Approval

Once file of approval came back then you can Update it here on this Tab/Part of the Approval form.

- Select the APPROVAL NO from drop-down. Here approval records with the Status – 'Sent for Approval' or 'Approved' or 'Rejected' will be available.
- Select the Records from Grid by clicking all given on the right – top corner of the Grid to process
- Select only those Records which are approved by the Committee. While do not select the Records if rejected by the Committee.
- Press UPDATE APPROVAL Button

NOTE: The Records which were selected before pressing the above button – their status will changed to 'Approved'; while other records will be marked as 'Rejected' – see below:



Now, these records are available for further processing in the next form – Manage Orders.

7.3. Manage Books Order

Once Books approval process is complete and you update acquisition records set to 'Approved' then all such approved records can be managed under 'Manage Book Order' form. On this form, you will add the Order details in each acquisition record and then will place the order to the desired vendor. Please make sure that you must already added the records of vendor in the Vendor directory – if not done then you need to add vendor details under 'Master Data' Module.

Book Order Form can be load once you click the button –' Manage Orders' under BOOKS ACQUISITION Module- following form will be displayed:

There are three tabs on the form – 'Add Order' ; 'Generate Order' and ; 'Receive Documents'. Accordingly you need to complete task in all these three part of the form, one by one, in the same order.

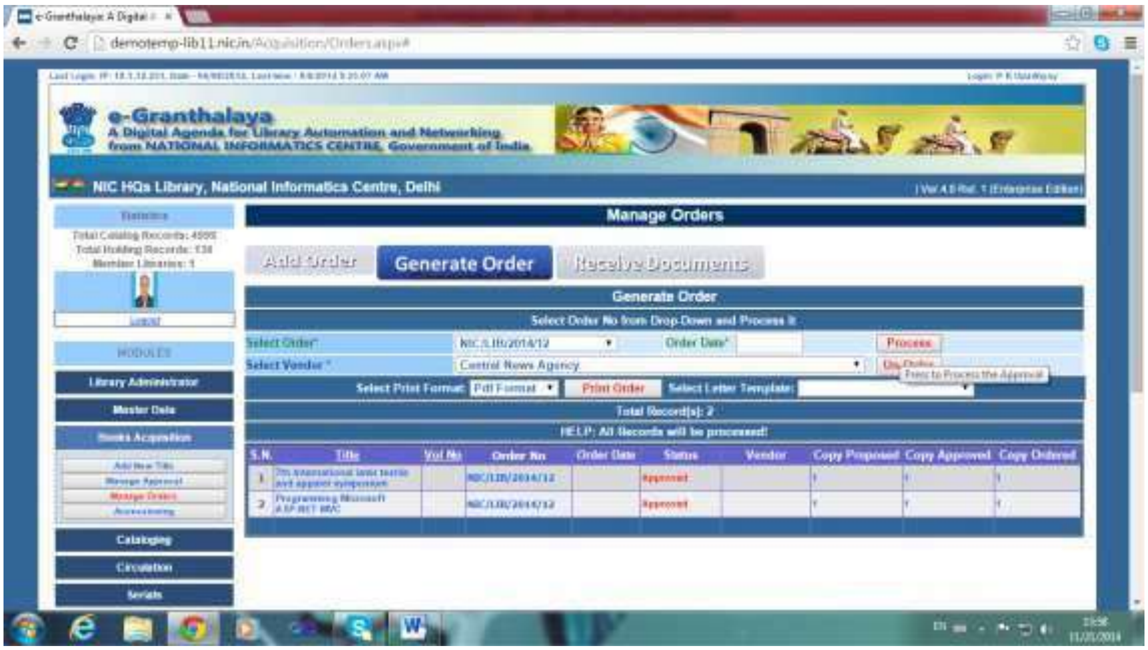
Add Order

- Select Approval Number from drop-down given on the top of the form – all titles approved in the selected approval no will be displayed in the grid at the bottom.
- Type unique ORDER NO – Order no already processed can not be re-used. You can make some pattern for deciding the unique Order No.
- Select the Titles from the Right of the Grid to include in the order no. You can press 'Select All' button given at the right top corner of the Grid to select all the titles.
- Press 'Add Order in Selected Record' button to save the data

NOTE: you can delete acquisition records at this stage by selecting the desired record(s) and press 'Delete Order for Selected Records'.

Generate Order

- Go to next Tab –'Generate Order' and select ORDER from drop-down – all records will be displayed in the Grid at the bottom of the page.
- Select Vendor to which you wish to place the Order
- Enter Data of Order in dd/MM/yyyy style – current date will be taken in default.
- Press PROCESS Button to save the data
- The record status will become 'Ordered'
- Take print out of the order by pressing 'PRINT' button



NOTE: You can cancel the Order by pressing 'UnOrder' button given on the above screen.

Receive Documents

- Select the Order from drop-Down
- Select the Record(s) manually of by pressing 'Select All' button given on the top right corner of the Grid
- Enter the Copy being received – sometimes less copies may be supplied. Later you can receive rest of the copies in the same manner.
- Press RECEIVE / Un-Receive Button to process the selected records.
- Now you can do 'Accessioning' of the received books in the next form.
- Once records are processed – selected Records status will be '**Received'**.

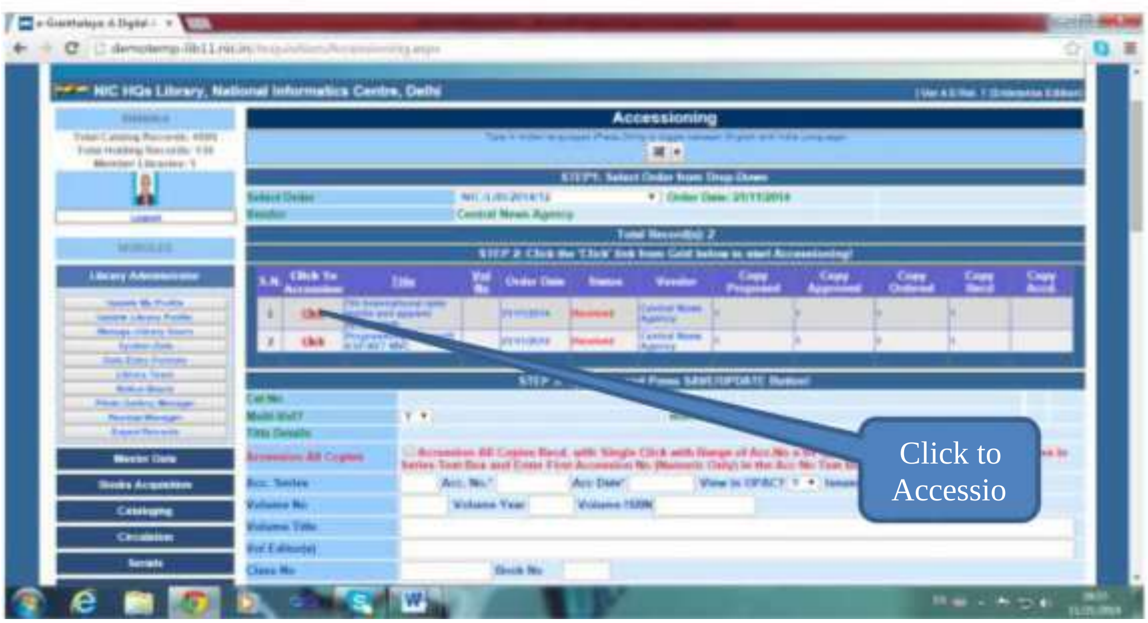
NOTE: Same button can be used to Receive / Un-Receive the records. Those records which are not selected will be 'Un-Received' on pressing this button.

NOTE: Those orders where all the copies are not received will be treated as 'Pending Order' – later remaining copies can be received. In this case finally enter the total no. of copies being received so far.

7.4. Accessioning

This form is used to do 'Accessioning' of the received books. Here you need to enter full details of the copies of the book being accessioned – thus it will complete the Cataloging of the book also. Before, Accessioning of the book – you need to check your 'Data Entry Format' for the type of documents you have already created. Later also you can update 'Data Entry Format' where you can select what holdings fields are required to enter on this form. The Data Entry Format can be changed/modified under 'LIBRARY ADMINISTRATOR' Module.

This form can be displayed by pressing 'Accessioning' Button from the left side under 'BOOKS ACQUISITION' Module – following form will be displayed:



How To Accession

- Select Order from Order Drop-Down. Only Orders with 'Received' status will be available for selection in this drop-down.
- List of Titles will be displayed in the Grid with Status 'Received', Copy Ordered, Copy Received and Copy Accessioned.
- You can do accessioning only those copies which are Received.
- Click the link 'Click to Accession' in the Left of Grid. It will fill the text boxes with the data.
- Enter details of the Copy - Accession Series (if any), Accession No, Accession Date (Current Date of the day will be filled in default) – enter date in dd/MM/yyyy format.
- Enter mandatory fields marked by * sign
- Only those fields will be visible which have selected in the DATA ENTRY FORMAT of the current document type – u can modify it any time.
- Press SAVE button to save the copy/holding record.
- Once Accession Record is saved it is displayed in another grid given at the bottom of the form.
- Acquisition Record will be '**Partially Accession'** (If all copies are not accessioned) or '**Accessioned**' on accessioning of all the ordered copies.

Duplicate Accession Number

Duplicate Accession No for a particular library will not be accepted. However, in case many libraries are using centralized database then all the libraries can have same accession number.

NOTE: Enter Accession Number in ENGLISH Language only. Accession Number may be alpha-numeric, can use Alpha device. Do not use punctuation mark, braces, hyphen, etc to avoid the bad performance of the software.

Centralized Purchasing

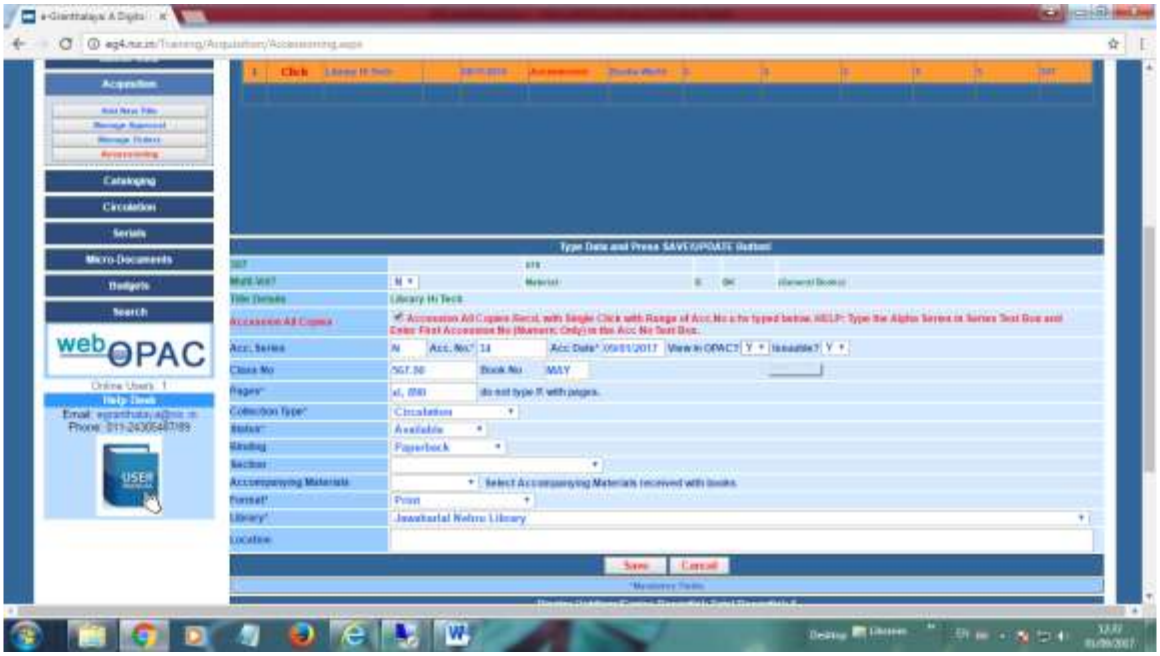
In case you are from MAIN Library Type and wish to do centralized purchasing for the branch libraries – then select the Library from Library drop-down for which copies will be added. At the time of creating LIBRARY RECORD you need to define the type of Library: M for Main Library and B for Branch Library. Main Library can do centralized purchasing/accessioning for branch libraries. Branch Library will do purchasing only for its branch and not for centralized library.

Bulk Accessioning

You can do bulk accessioning on this form with Automatic Accession generated by the system. This is very useful for those libraries where many copies of the same book are purchased with system generated Accession Number. Moreover, Alpha device can be used as a prefix with Auto generated Accession No. For example, you wish to add 50 copies of one book with Auto generated accession no:

- Check the Option – "Accession All Copies" given in the Red color
- Enter Accession Series Alpha device if any (ENGLISH Only) in a separate field given on the form . E. g. N

- Total No of Copies will be taken from the Order records you have selected from top Grid. You can not do accessioning of more copies what you have received.
- Enter First Accession no (Numeric Only) in the text box from which Accession will be started.
- Enter data in the relevant fields
- Press SAVE button
- It will add all the received copies with auto- accession no.



NOTE: While generating Auto-Accession Number in the required counts, in case any accession number is already added – system will not over-write the existing accession no, rather it will jump one number next to the already saved number. The Accession number creation will be started with the Accession Number you have typed in the ACCESSION NO text box.

Delete Accession Records

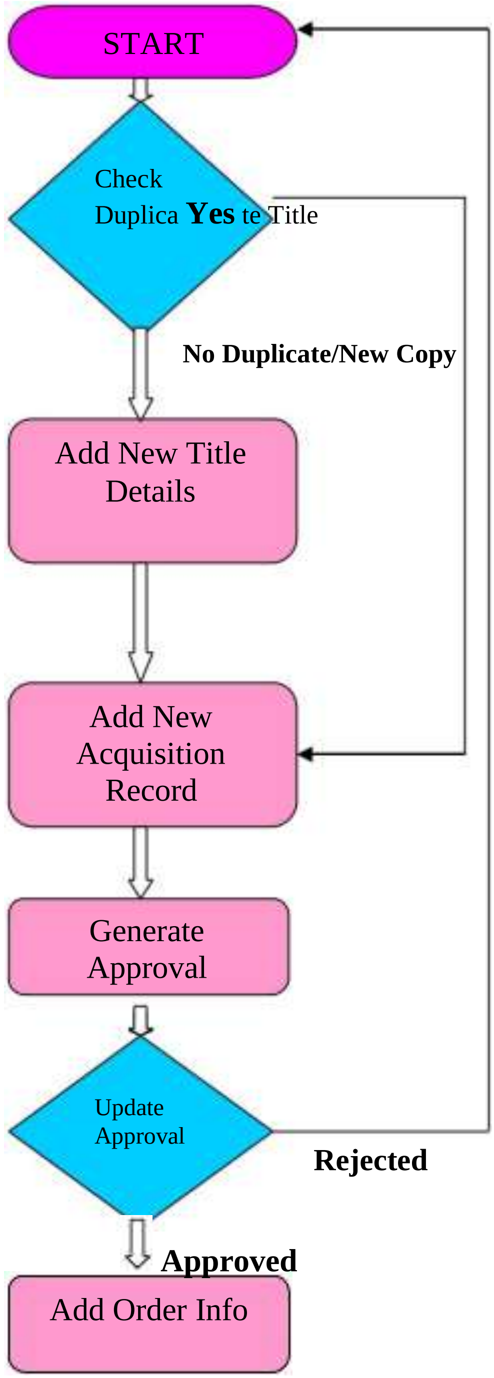
You can delete all the accession Records from the Grid displayed at the bottom of the form after you 'Click' the Receive Records from top Grid. The Accession number with 'Available' status will only be deleted.

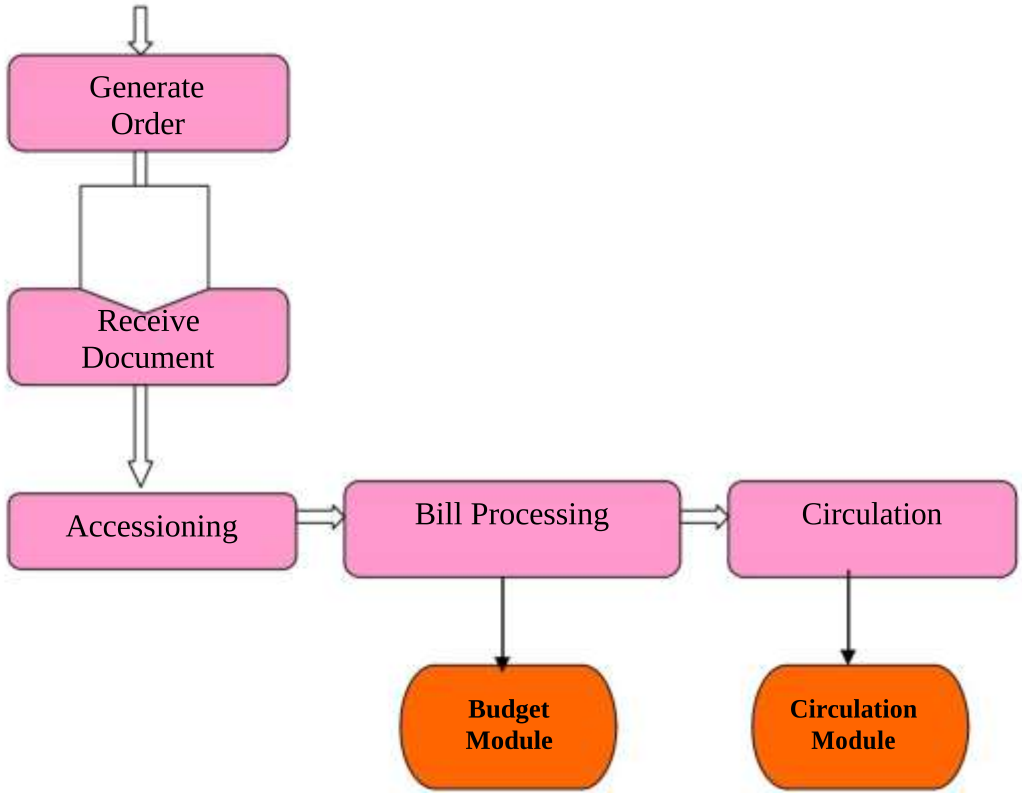
Edit Accession Record

Copy records can be edited here which are displayed in the Grid at the bottom of the page. These all Accession Records belong to the Title Record which is selected from Top Grid.

- Press EDIT Link from the left side of the Grid displayed at the bottom of the page
- Accession Record will be displayed on the form
- Modify the Text / fields
- Press UPDATE Button to save the changes

7.5. WORK FLOW of the ACQUISITION PROCESS





7.6. Backward Movement of Acquisition Process

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

- Delete All Accession Records – Acquisition Record Status will be ‘Ordered’
- Un-Receive the Records in ‘Manage Order’ form
- Delete Order Info and save the records
- Delete Vendor name from order
- Delete Order No from purchasing records
- Reject the Titles in the Approval form
- Delete Approval Number and other data in ‘Approval’ form
- Delete Purchasing records
- Now either you can re-start fresh purchasing or can delete CATALOG Records from database.

7.7. Bill Processing

After Accessioning of the books purchased in the above steps – now you can do ‘Bill Processing’ for accessioned books under **Chapter 9: Budget Module.**

Chapter 8
Cataloging Module

This module is used to enter the full cataloging details of the books purchased under BOOKS ACQUISITION Module as well as provide facility for 'Direct Data Entry' for existing/new collection in the Library. Following Forms are available under the module:-

1. Retro-conversion – For direct data entry of Books and Monographs.
2. Change Copy Status – To change / update of the copy status in bulk.
3. Stock Verification
4. Generate Barcode Labels
5. E-Books Manager – Manages e-Books contents
6. Update Holdings

8.1. Retro-Conversion

This form is the biggest attraction of e-Granthalaya software as the most users are using this utility. This utility provides the facility to enter full cataloging details of a book in the library. The following details of the book can be entered here in a single form:-

a). Cataloging Data (Title/Author/Publishers, etc. details.)

b). Acquisition Data (Purchasing data – Cost/vendor/bill details etc.) c). Copy/Holdings Data (Accession no details)

In eG3 there were separate three parts of the form with separate SAVE button to save three kinds of the data mentioned above. Now, in eG4 – A single form is used with single SAVE button to save all these three kinds of the data – data is saved with single click. Moreover, Acquisition fields are optional and can be set Visible to YES or NO in the default setting under LIBRARY Profile in Library Administrator Module.

8.1.1. Before using Retro-conversion

You need to do following two tasks before start of using the Retro-Conversion utility for direct data entry:-

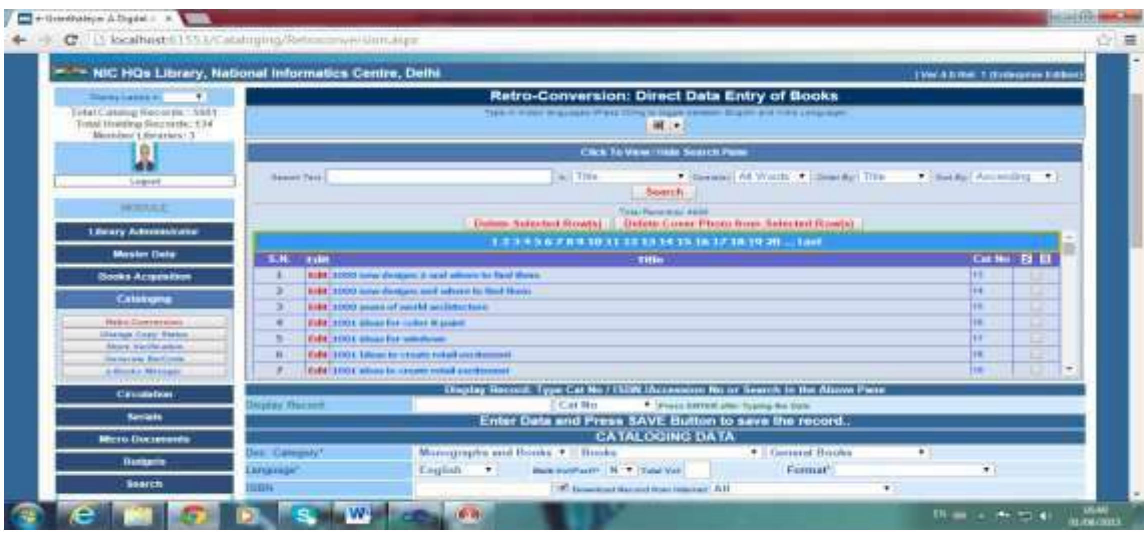
- Acquisition fields are optional and can be set Visible to YES or NO in the default setting under LIBRARY Profile in Library Administrator Module. In case, you set the value as YES then Acquisition Fields will be visible for data entry otherwise fields will not be visible. This can be done in the 'Update Library Profile' form under LIBRARY ADMINISTRATION MODULE – open this form and select the value YES/NO from drop-down against –"Purchasing Data" label as given below:

Purchasing Data	Y **Do You wish to Include Purchasing Data (Cost) in Retro-Conversion?**

- **Define your Data Entry Formats for all kinds of documents. This can be done in the 'Data Entry Format' form under LIBRARY ADMINISTRATION Module. The format can be changed /edited any time. Whatever fields you will select in the format and will SAVE – only those fields will be available during data entry in Retro-Conversion.**

8.1.2. Search Existing Catalog Records

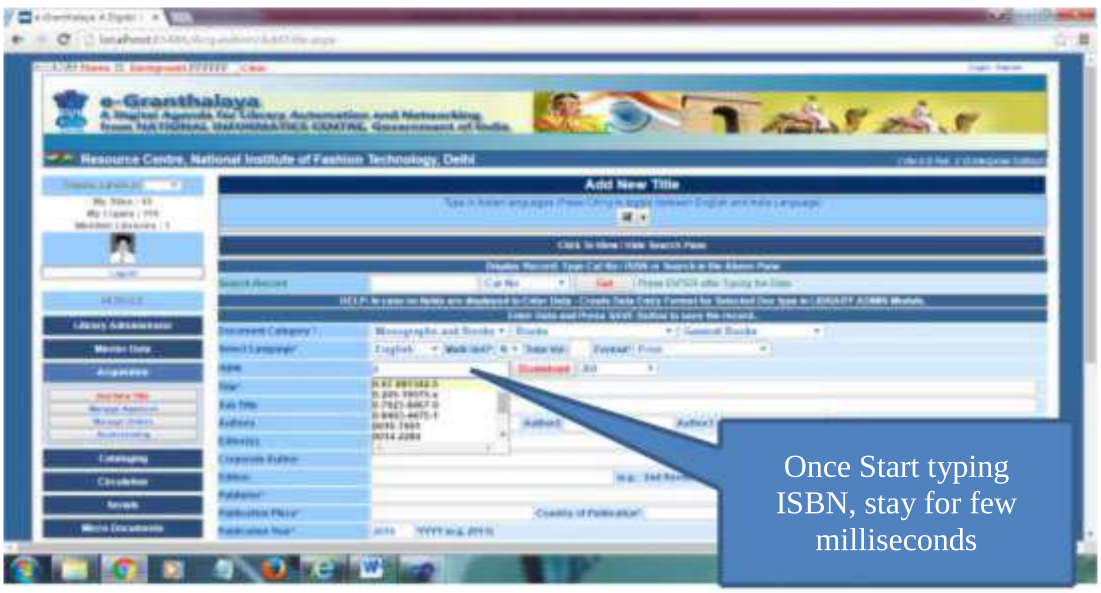
Before start of the data entry of the books and monographs in Retro-Conversion form – it is always better to search existing records. For Searching existing records, you need to click on 'Search Pane' given on the top of the web form, following screen will appear:



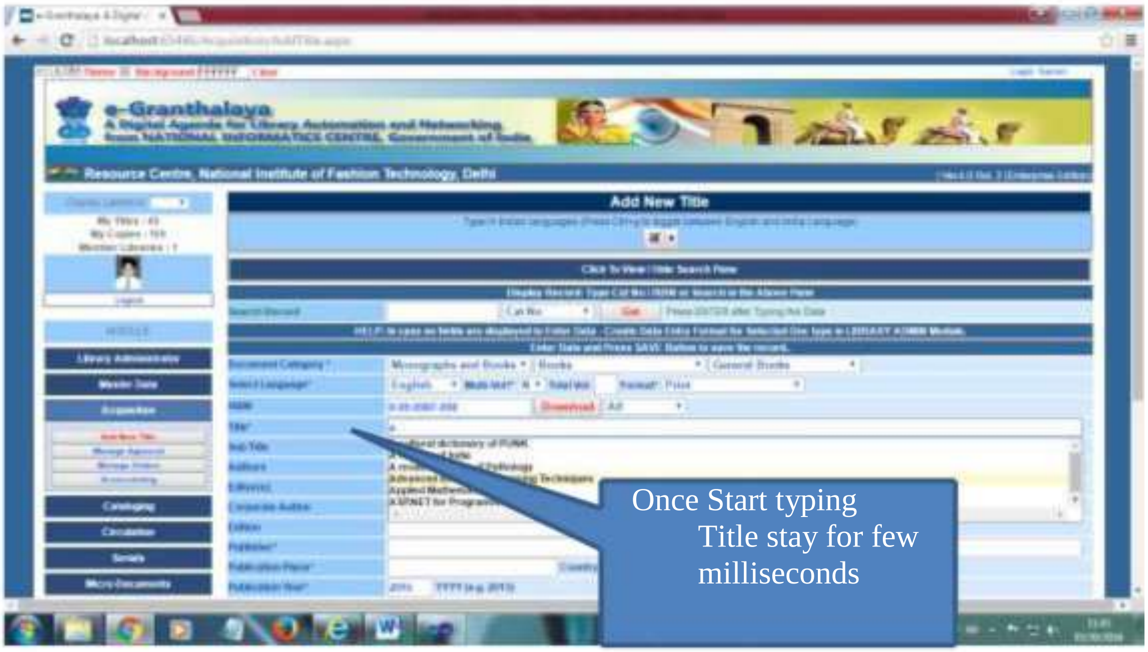
In the above screen, you can search the existing catalog records by giving a number of parameters such as Title, Author, Publisher etc. In case you do not type any of the parameter and press SEARCH button - then all results will appear in the result grid. Once results appear in Grid then you can perform many functions on the records – such as can delete records, can delete photo of selected records, etc. By pressing EDIT button you can display the Record in the EDIT area and can modify the data.

How to Find if Title Already Entered?

- ISBN Field: Once start typing ISBN No in the ISBN Text box – stay for few milliseconds, in case same ISBN already entered then it will be displayed – if it is there it means title already exists and then you can display the same title by searching it by its ISBN No under SEARCH Option

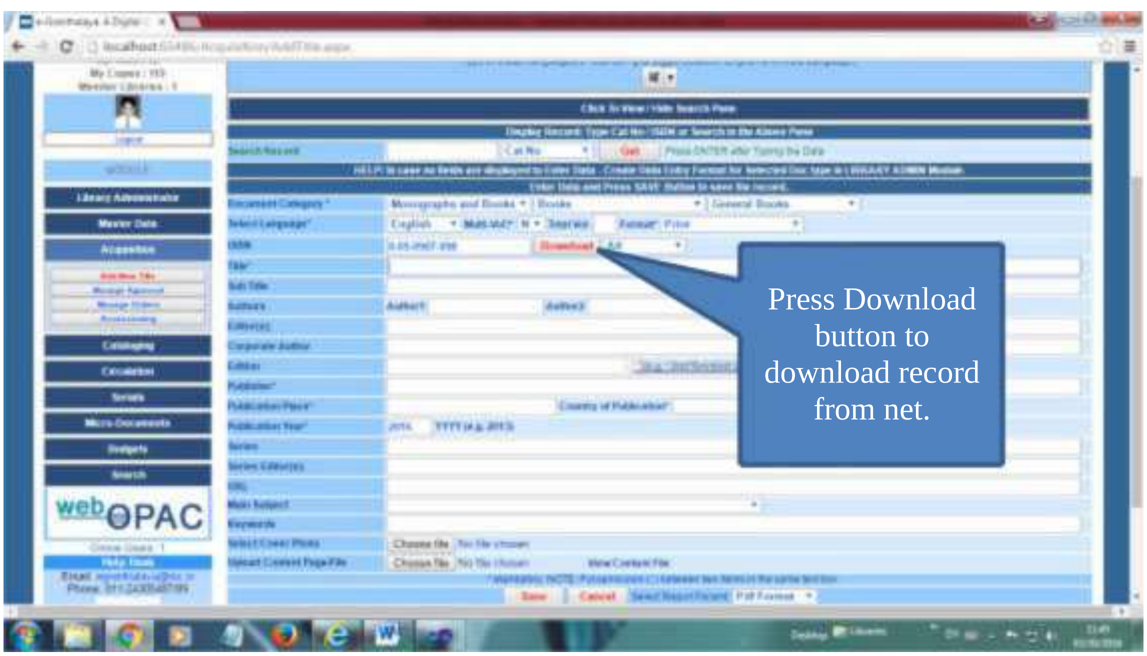


- **Title Field** –
  - Start Typing Title in TITLE text box
  - Wait for few milliseconds after typing first letter
  - If title already exists then you can select the Title from suggested Items
  - On selection of Item – its CAT NO will be written in SEARCH Text Box
  - Press GET Button to display the Title Record



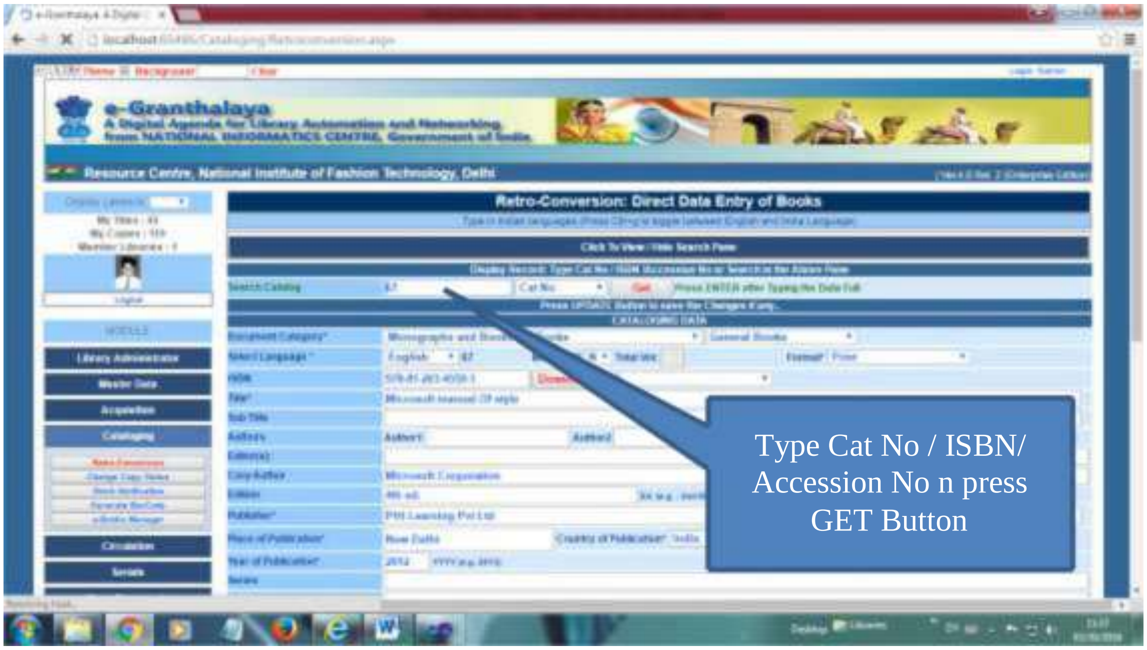
How To Download Catalog Record from Internet?

- Enter ISBN No in ISBN Text Box
- Press DOWNLOAD button to download record from net (if exists somewhere)
- Correct the data if required.
- Press SAVE button to save the Record



How to Display Already Existing Catalog Record?

- Type CAT NO / ISBN / ACCESSION NO in the SEARCH Text Box (As seen in below screen) of the existing record
- Press GET Button
- Record will be displayed



8.1.3. How To Create New Record for Books and Monographs

- Load 'Retro-Conversion' Form if not already loaded.
- Start Typing appropriate data in the fields appear with labels. In case, you wish to modify the fields then you can do it by modifying your DATA ENTRY FORMAT created under LIBRARY ADMINISTRATOR Module.
- Enter Document Category / Language of the books, Format etc.
- If book is multi-volume then select YES from drop-down.
- Enter ISBN as printed on the books (In case, you have set to download the Record from Net automatically and your Checkbox is selected then during typing of your data system will search the catalog record and will display on the screen if exist) – You can set to download catalog record automatically YES/NO by changing the setting in LIBRARY ADMINISTRATOR MODULE under LIBRARY DETAILS Form.
- Enter all the data as per cataloging rules
- Enter Purchasing Data if any. (You can control availability of purchasing data fields by entering YES/NO value under LIBRARY ADMINISTRATOR MODULE in Library Details Form)
- While typing data in AUTHOR1, AUTHOR2, AUTHOR3 and PUBLISHER drop-down, you need to select the value if already exist. In case, new entry then you need to type the value in the respective drop-down.
- You can upload the cover photo/image of the book
- You can upload content file (in pdf or other format) if any.
- Enter holding data in the lower part of the form.

- Date must be entered in ‘dd/MM/yyyy’ format
- Press SAVE button to save the record.
- On saving the record – a record number (CAT NO) will be created automatically.
- Once copy(ies) is / are saved – these holding records will be visible in the lower Grid at bottom of the form.

8.1.4. Add More Copies in the Existing Record

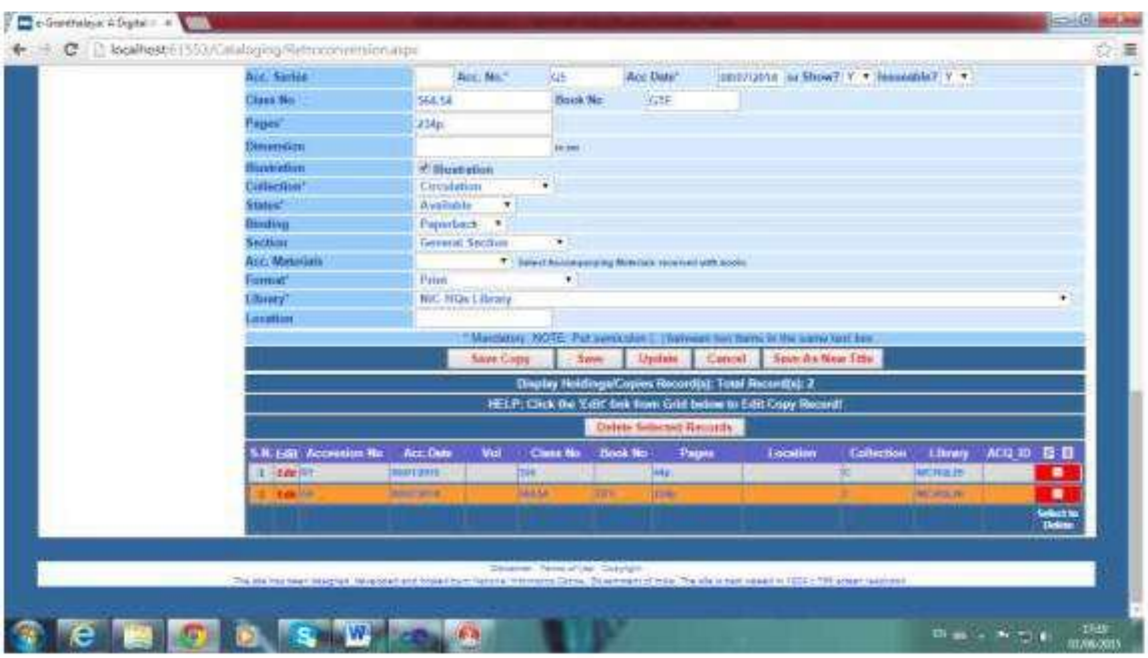
- Once Catalog Record is saved then you can add more copies in the existing record by pressing ADD COPY.
- Type the copy data and press SAVE COPY Button to save the Record.

8.1.5. How to Copy Holding Data for New Copy

- You can use existing record of holding to add new accession number.
- Press EDIT button from the holding / copy Grid at the bottom of the form.
- Enter new accession number and other information and SAVE COPY button to save the copy.

8.1.6. How to SAVE as NEW CATALOG RECORD

- You can press EDIT Button form the copy Grid at bottom of the page (IF copy records exists)
- The modify the data for new title/copy and press SAVE AS NEW TITLE button to save record.
- This is very useful if new edition appears of the same book.



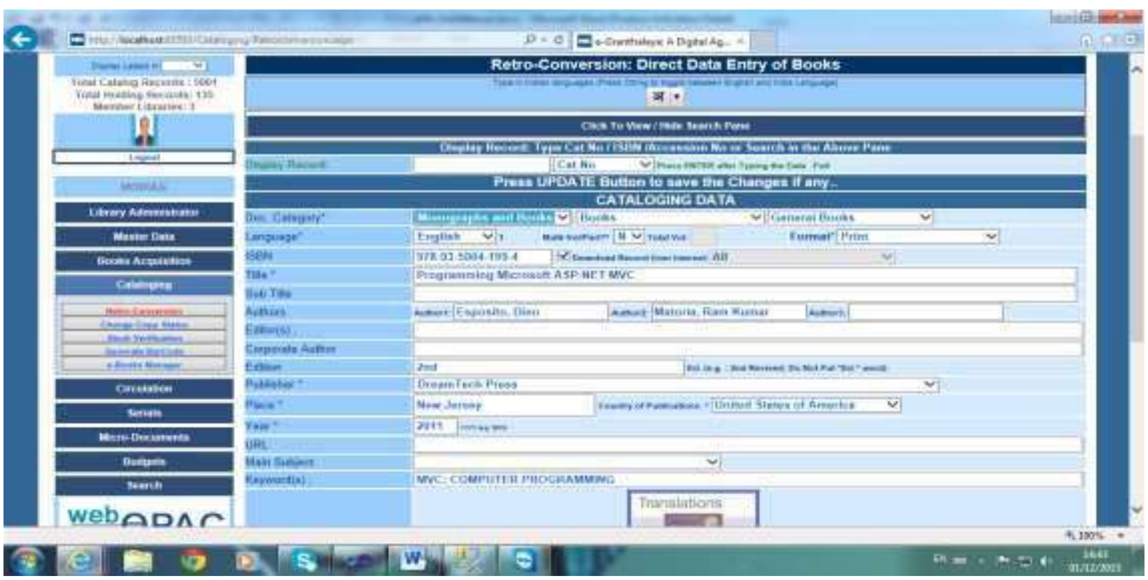
8.1.7. How to Add multi-copies in Bulk

- Display the Catalog Record of book
- Check the option –'Accession Multi-Copies with Single Click' on the Copy data part of the screen
- Enter Accession Series Alpha Device if any.
- Enter No. of copies to be accessioned in bulk.
- Enter Start 'Accession No' – On saving copies in bulk next accession numbers will be saved automatically.
- Press SAVE COPY Button to save all the copies.

NOTE: During bulk saving Accession Number will be created automatically in the next order. However, in case, in between any accession no is already exist then this accession no will be skipped to next available accession number.

8.1.8. How to Edit existing Record

For editing any existing record, first you need to display the record. You can display record either by searching it from 'Search Pane'. You can also type cat number in the CAT NO text box and press ENTER – if record exists then it will be displayed as shown below:



Once data is displayed then you can change the text entered in various fields.
After changes are made , press UPDATE button to save the changes.

8.1.9. How to Edit Copy Data

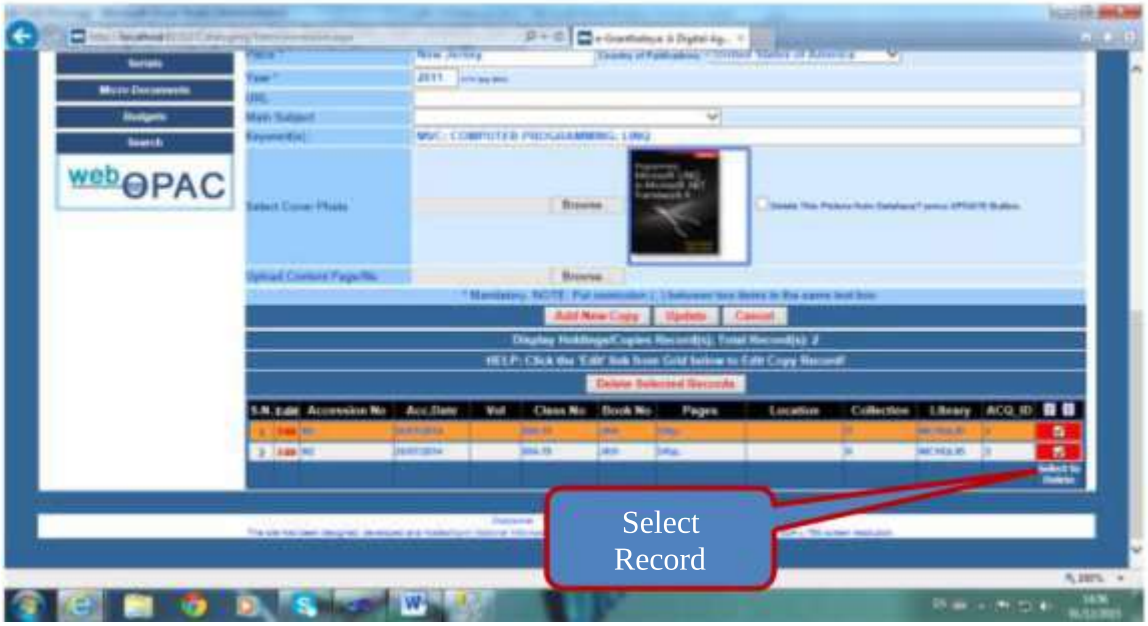
Once you display the Record as mentioned above, the holding/copy records are displayed in the Copy Grid at the bottom of the Record as seen in the below screen.

- Press EDIT button from the Data Grid displayed at the bottom of the form – the Copy Record will be displayed in the form.
- Change / modify the data.
- Press UPDATE button to save the changes

8.1.10. How to Delete Copy Records

Once catalog record is displayed along with its copy records are displayed in the data Grid at the bottom of the form – you can delete selected copy records. In case any circulation transactions available for any of the copy record (Accession Number) then first you need to delete Circulation Transactions of the desired Accession Number and then you can delete copy record.

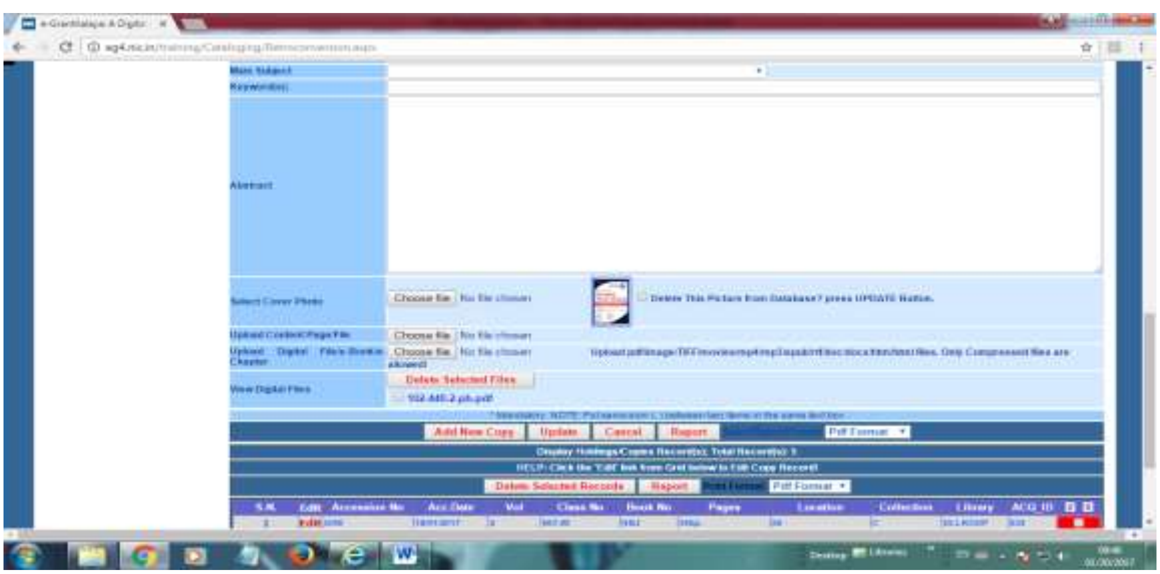
- Select the Copy Record from data grid by clicking the delete check boxes given at the right side
- Press 'Delete Selected Record' button to delete the copy(ies)



8.1.10. How to Upload Digital Files/e-Books with Catalog Records

- e-Granthalaya 4.0 provided facility to upload digital files of any document along with the data record of a book.
- The Digital Files can be uploaded one by one, one file during one save/UPDATE.
- Digital file can be uploaded during data entry of new book with SAVE Button
- Digital file can also be uploaded during Editing after display of existing catalog record and while pressing UPDATE button.
- During new record – browse the file by pressing Browse File button – select digital file and the press OK. Now press SAVE/UPDATE button.
- Format supported – TIFF/IMAGE/PDF/EPUB/HTML/MOVIES

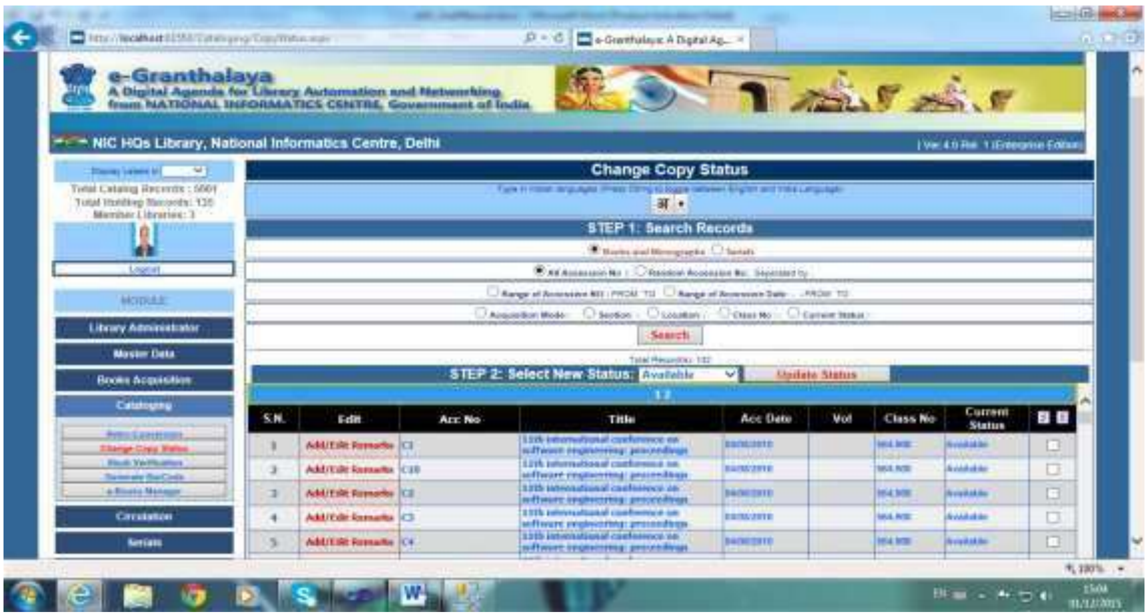
NOTE: Once file uploaded with catalog records, same may be displayed/downloaded during display of the record in Data entry program or on OPAC search page.



8.2. Change Copy Status

This form is used to change the status of every copy entered as holding record. Every copy of the book available in the library must have a particular status. These status are stored in the Master Table and can be added/modified under 'System data' under LIBRARY ADMINISTRATOR module.

<u>NOTE</u>: Issued/Returned/Available status are changed automatically during circulation. To change the copy status, press 'Change Copy Status' button from the main menu under CATALOGING module, following form will be displayed:



- Search the existing copy records , filtered by various parameters, by pressing SEARCH button, results will appear in the Grid. There are various options available on the form to search existing records. You can select all Accession number or Random Accession Number (give ; and space between accession number).
- Select particular record/all records from right of the grid by selecting check boxes displayed against each record.
- Select the new STATUS from drop-down given above the grid.
- Press UPDATE STATUS button to save the changes.

How to Generate Status-Wise Reports

You can get three kinds of the Reports – Compact/Summary and Detailed Report. The format of the report may be PDF, DOC and HTML format. Press appropriate Report button to generate the report. Once report is generated then you can print or save the report.

8.3. Stock Verification

This form is used to do 'Stock verification' of the library holdings which can only be done once in a year. To start with – first load the 'Stock Verification' from by clicking 'Stock Verification' button from the main menu of CATALOGING Module:

Step1:

First enter Stock Verification Year in **yyyy** format in the text box and press 'Initiate Process' button – it will create a columns with the name of the Year in the Table. You can create only one SV Year Column ever year. Therefore, in case particular year SV column exists then this step can be skipped.

Step 2:

Transfer current status of all the copies except 'Available' – for example the copies already 'Issued' or with some other status needs to be transfer under SV year. Press 'Transfer Current Status' button to transfer the status of every copy.

Step 3:

- [illegible]
- Type Accession No in the Text Box
- Press ENTER – it will update the status of accession with status "Available"

Step 4:

In the last step, press UN-TRACED Button – it will display those copy records where no 'Attendance' is marked and such copies are regarded as un-traced copies. You can re-check such copies and in case they are found then accordingly you need to update their status as 'Available'.

How to Generate SV Report

- Press 'Un-Traced Books' button
- Select the Report Format from drop-down
- Press Report button.

How to Export SV Data

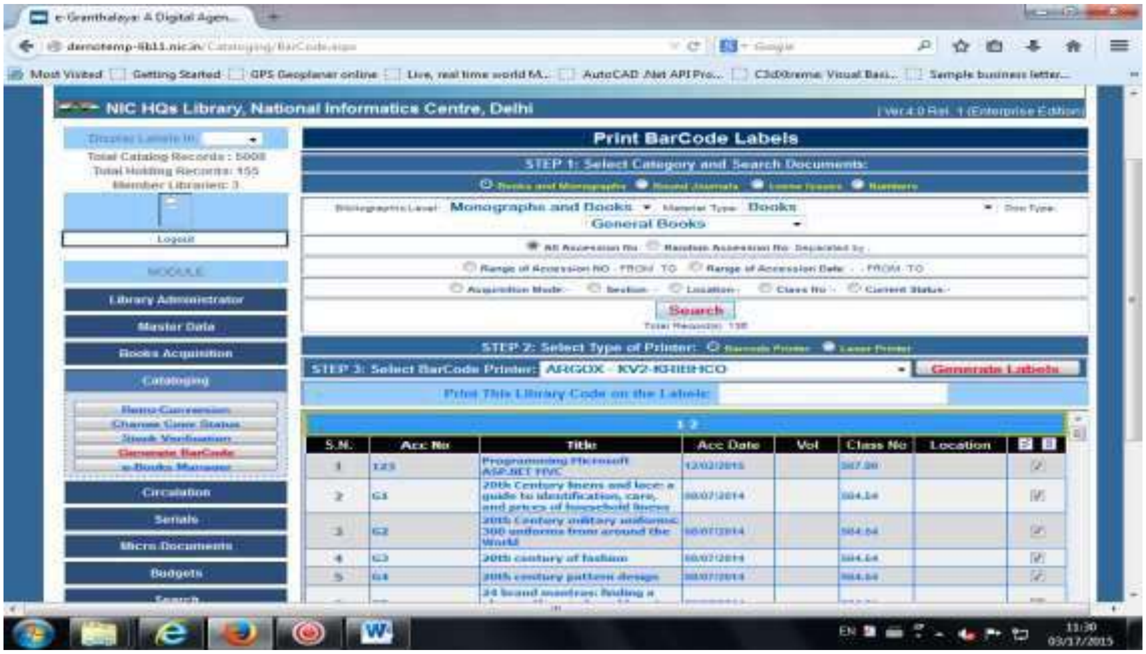
- Press EXPORT SV Data button
- Data will be saved in Excel sheet and will be saved on local disk.

How to Delete SV Data

- SV data can be deleted completely by pressing 'DELETE SV DATA' button – it will delete only SV column of a particular year you have entered in the YEAR text box.
- This may be required to re-start again the SV process for the same year.

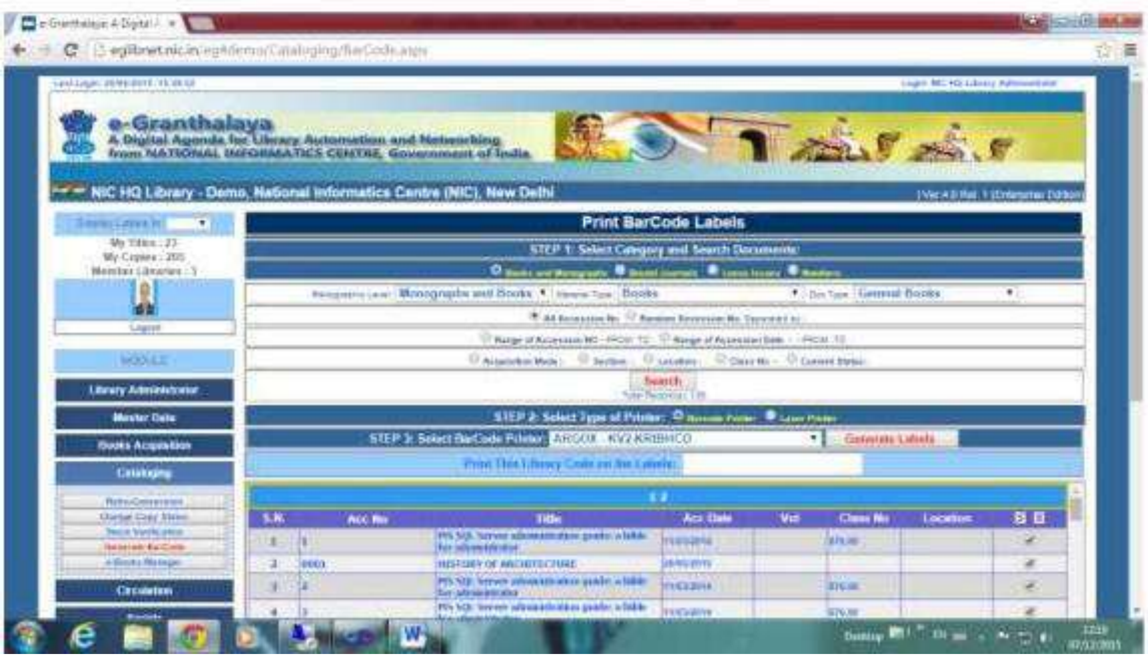
8.4. Generate BarCode Labels

This Form is used to Generate Barcode Labels by Laser Printer as well as Barcode Printer if installed with your Pc. The quality of barcode labels generated by Barcode Printer is better than laser Printer. The barcode labels are always generated by ACCESSION NUMBER and can be generated of all the accession numbers entered or some selected Accession Numbers.



How to Integrate Barcode Labels with e-Granthalya

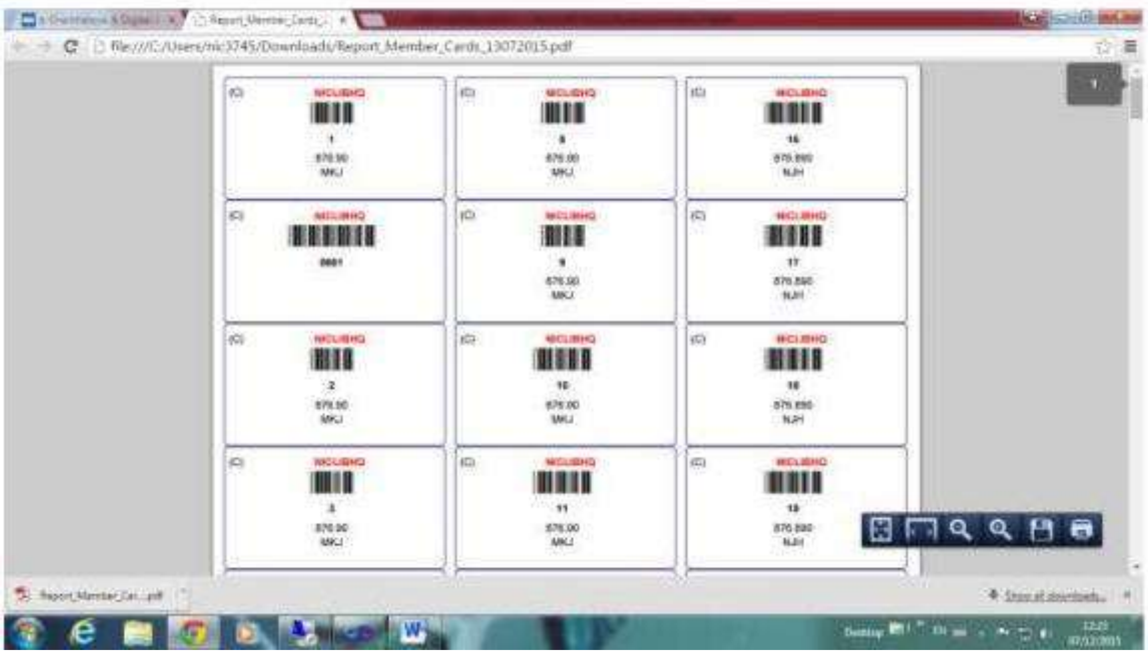
When you purchase any barcode printer – it is always better to purchase it from local market so that service may be get whenever required. Also, you must test the printer / scanner before making payment. Any model/make of barcode printer will work with e-Granthalaya Software, however, while purchasing the printer you need to get PRN File of your labels from Vendor. PRN file contains the setting of the labels and is needed to integrate your barcode printer with e-Granthalaya.



<u>How to Generate Barcode Labels from Laser Pinter</u>

- Search the Records by pressing SEARCH Button.
- User various parameters for filtering the records

- Once Results appear in the Grid then select Option - Laser Printer
- Select Label Sheet Size from drop-down (Various Sheets are available in the market where blank labels are pasted over the A4 Size sheet)
- Press GENERATE LABELS Button
- Labels will appear as a separate file in PDF format –download file and Open it
- Print the File



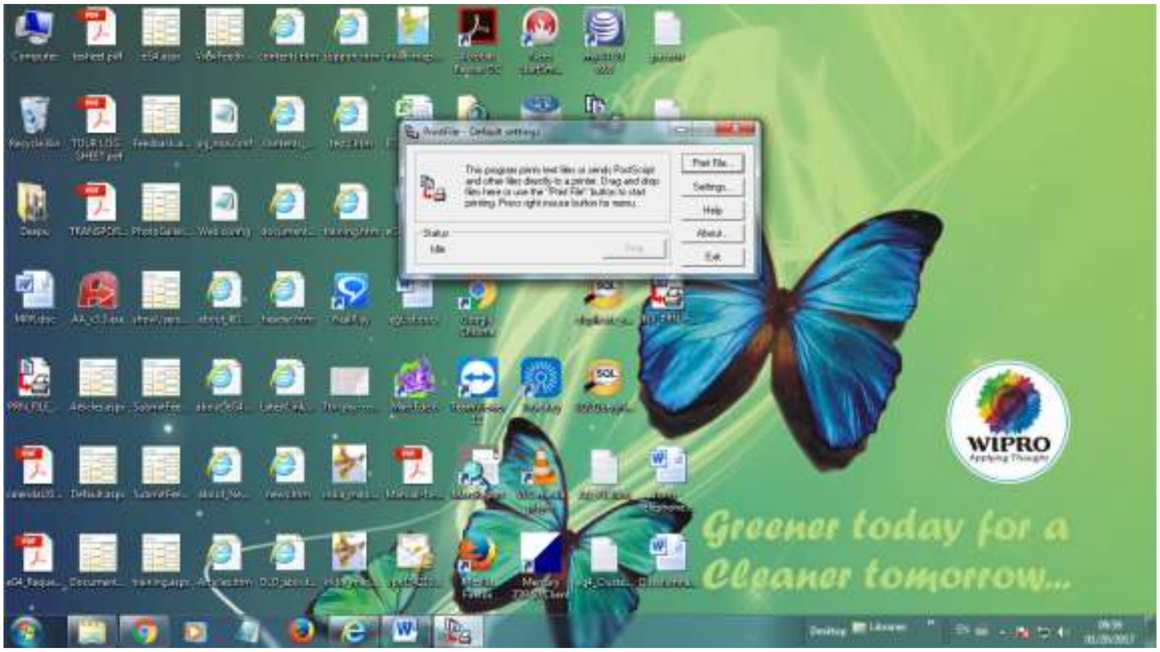
NOTE: Barcode Labels on Laser Printer can be generated in PDF format or DOC format. Format may be selected from Drop-down given on the form.

How to Generate Barcode Labels from Barcode Pinter

- Search the Records by various parameters – press SEARCH Button
- Get integrated your barcode printer by providing PRN file from vendor – Please Read First Chapter for Details.
- Select the Option – Barcode Printer if not already seleted
- Make sure that your barcode printer is installed properly
- Select the Barcode Printer from List already integrated with eG4.
- Press GENERATE LABELS
- A Text/PRN file will be created and shown on the bottom of the screen
- Print this file on barcode printer using the utility – "**PrintFile**" which you need to download and install in your PC from google.com or from http://www.lerup.com/printfile/descr.html

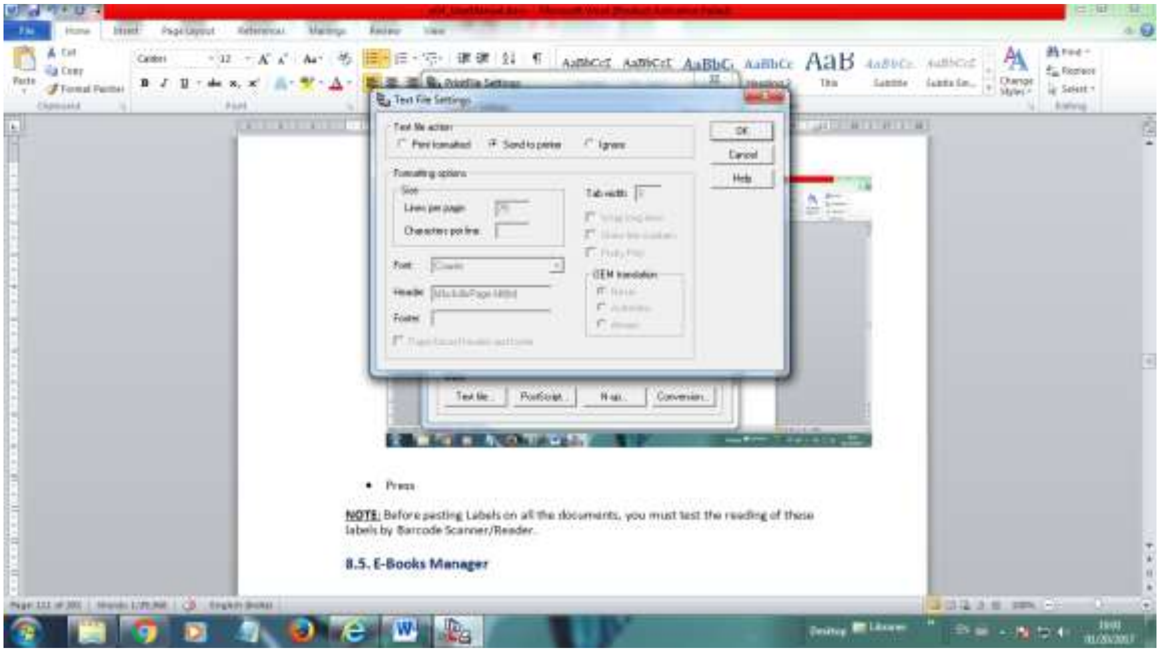
How to Print "Generated PRN" file on Barcode Printer:-

- Install "PrintFile" utility and set it once as given the steps below
- Run "PrintFile" utility after installation by double click of its icon on desktop



- Click “Setting” button from the above screen
- Following Screen will appear

- Press “TEXT FILE” button from the above screen given on the bottom, following screen will appear



- Select “Send to Printer” option from top of the screen as above
- Press OK
- Press SAVE Button
- Now Utility is ready for printing PRN file being generated
- To print the PRN file generated every time when you press Generate Barcode Label button – press PRINT FILE button
- Browse the file and select it
- Then select the Barcode Printer
- Press PRINT – label will be generated on barcode printer

NOTE: Before pasting Labels on all the documents, you must test the reading of these labels by Barcode Scanner/Reader. Sometimes barcode scanner reads the label with only 4 digits or sometimes more than 4 digits only. While purchasing barcode scanner please ask the vendor to set it so that it can read any digits (single or more).

8.5. E-Resource Manager

This form is used to manage the e-Books and full-text reading materials like chapters of the books or full book in e-format, reports or other kinds of materials. However, before uploading of digital contents, you need to enter the catalog record of the documents using other modules where data entry of books/serials are done. The format supported in eG4 are TIFF/Image/PDF/HTML only.

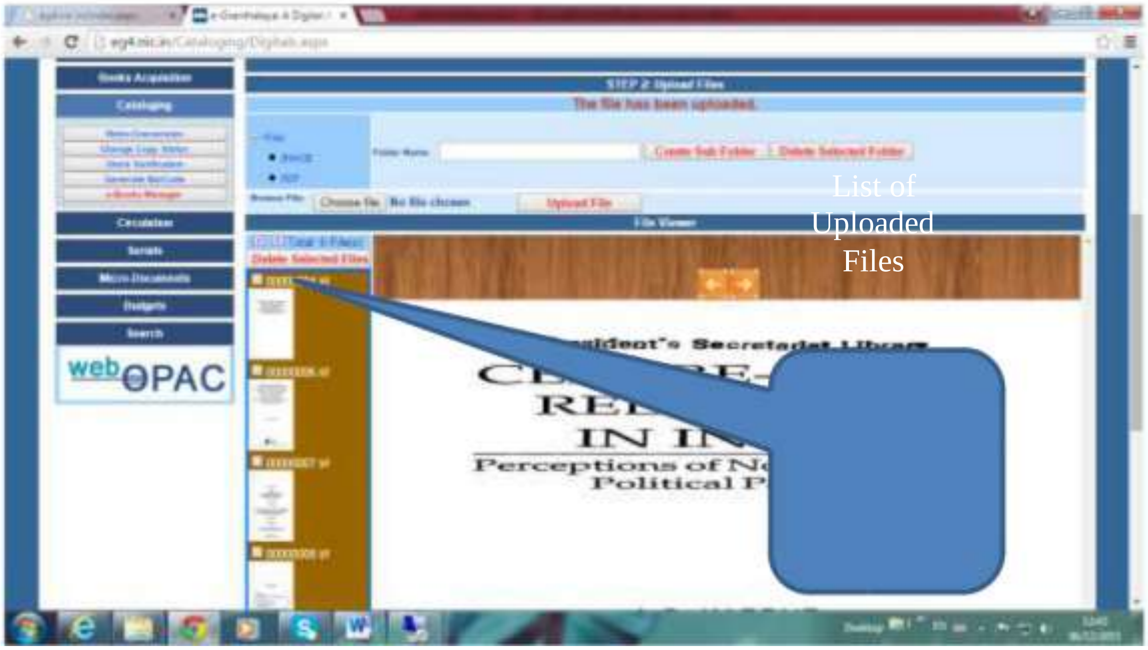
When you upload the digital content of any documents, a main folder is created with name of your LIBRARY CODE under DFILE folder where CAT_NO sub-folder is created where further individual CAT NO sub-folder is created to save the content. The digital files can be copy and paste in these folders directly avoiding uploading of files, one by one.

You can load the form from CATALOGING MODULE by clicking the button –'e-Books Manager' – following form will appear

How to Upload Digital Files?

- Search the desired Title by various parameters given on the top of the form and press SEARCH Button.
- Then pickup the title from drop-down – will display details of the Title
- Press 'Choose File' option and select the digital file from local hard disc or other devices in your PC / LAN
- File names must be simple, alpha-numeric, without any punctuation mark and not lengthy than 20 characters.
- Press Open button after selecting the file it will take you back on the web form where you need to press UPLOAD Button to save the selected file on the server in designated folder/sub-folder.
- Once file is uploaded, it is seen in the uploaded file list at right side of the form

NOTE: Only TIFF/GIF/JPG/PNG/PDF/HTM/HTML file extension will be uploaded.
NOTE: Before upload, files must be compressed well. In case of PDF file, few software can be used to compress the files. E.g. Adobe software is there which may compress the file upto 100%.



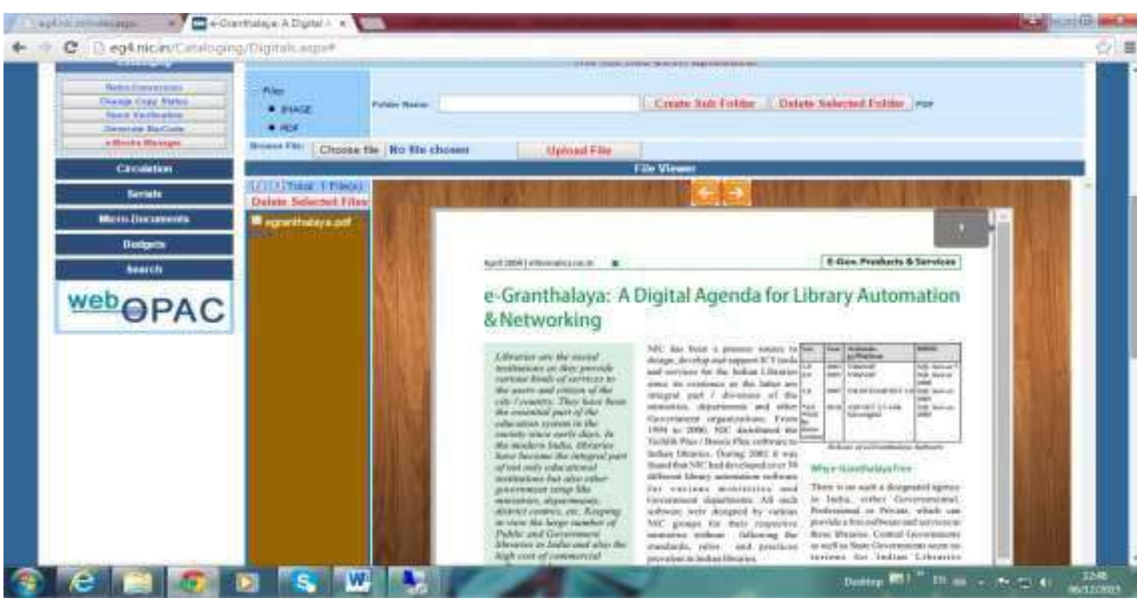
In the above screen, you can see the list of uploaded file which can be clicked to view the full page.

How to View Upload Digital Files?

The uploaded files will be accessible on Web OPAC Pages

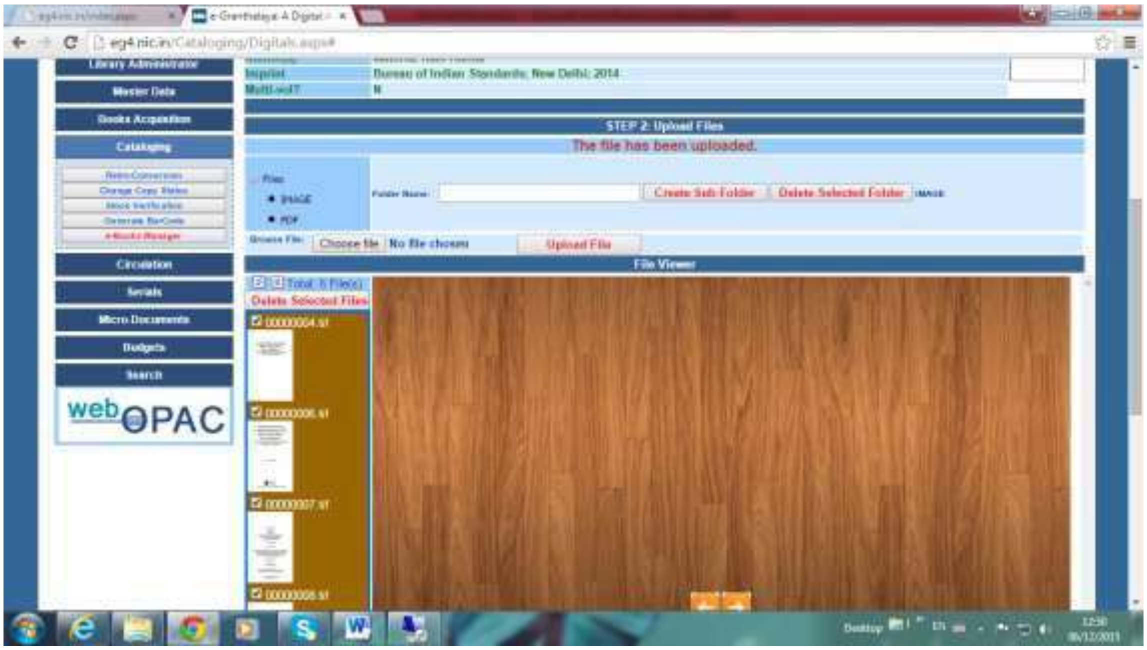
To view uploaded files, select the Title from drop-down after Search, then list of folders will be displayed in the left side of the page. These folders may be PDF/IMAGE/HTML according to uploaded file. Click the folder e.g. IMAGE folder then list of files will be displayed in the left side where thumb-nail image of every file will be displayed. Click the thumb-nail to view the file in full page style.

<u>NOTE</u>: Digital Library can only be accessed by Library members on OPAC pages after LOGIN. Login is done using Member No and Password provided and registered by Library. Password for registered member can be generated and sent in the mail using facility given on MEMBERS Form under Circulation Module.



How to View Delete Upload Digital Files?

- Select the Thumb-nail of desired file(s) to be deleted from left side where all the files thumb-nails are displayed.
- You can select/de-select all the files with single click by clicking on the image on the top of the thumb-nail list.
- Once selected then press DELETE SELECTED FILE button



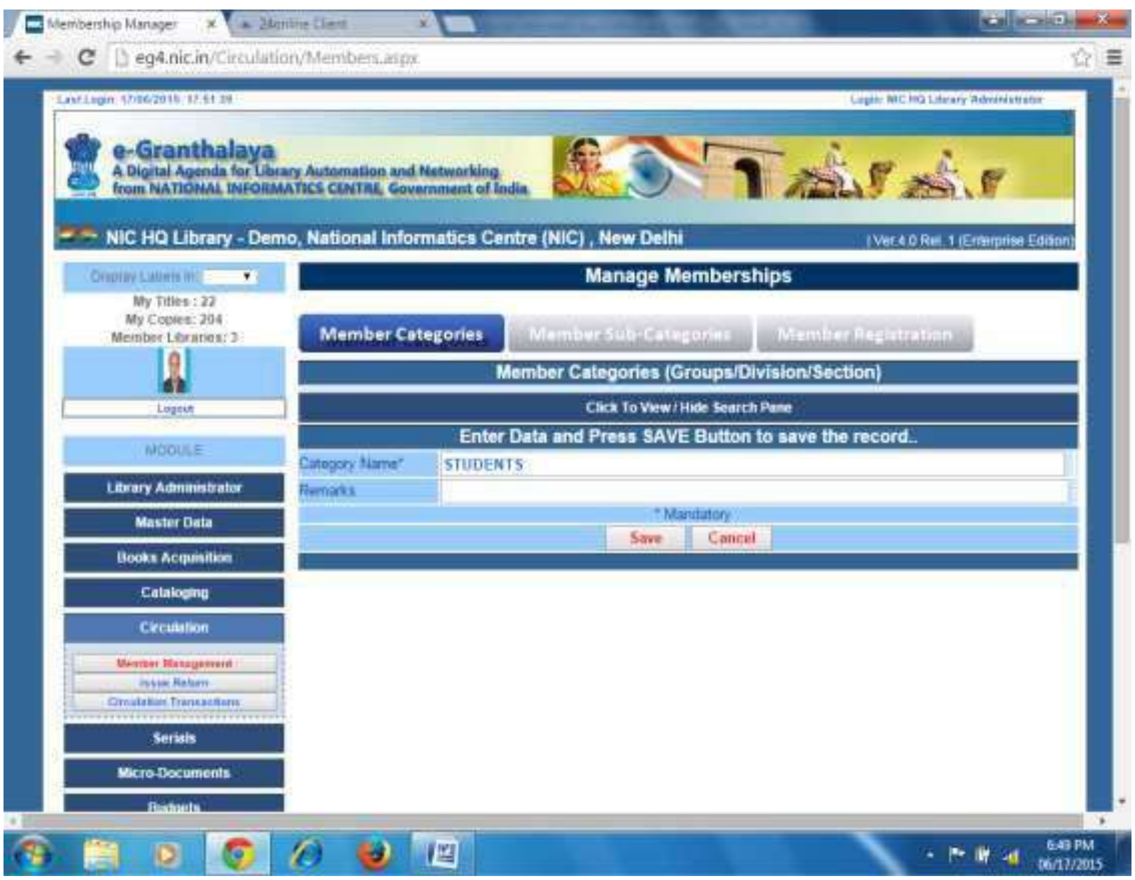
Chapter 9
Circulation Module

This module is used to manage members registration and issue / return of the documents available in a library. The module must be used after completing data entry of books and monographs. The module will manage the following activities:-

1. Creation of Member Categories and Sub-Categories
2. Member Registration
3. Issue/reserve/return and renew
4. Circulation Transactions Management
5. Reminder for Over-due issues
6. Fine /Receipt Management
7. Import Member Data from EXCEL

9.1. Member Management

This form is used to create Member Categories / Sub-Categories and Member Registration. The Form can be accessed by clocking 'Member Management' button under Circulation Module, from the left side – following form will be displayed:

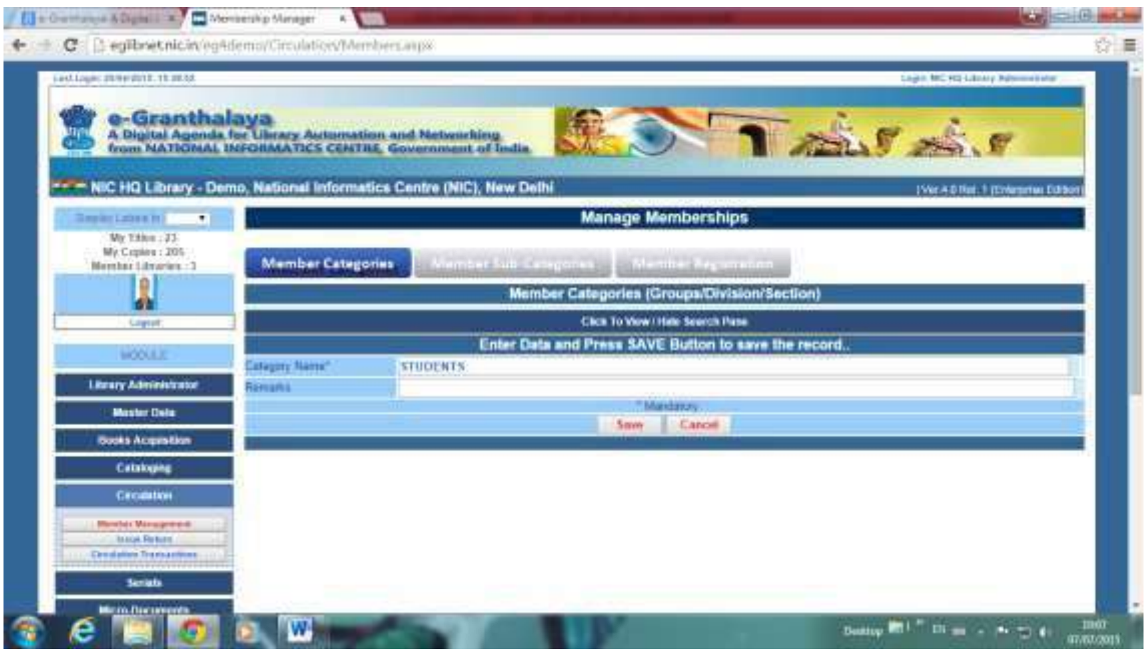


There are three Tabs on the Form – Member Categories / Member Sub-Categories and /Member Registration – These tabs are discussed in details below:

9.1.1. Member Categories (Division / Section /Department in the Organization)

Before Registration of any library member, it is useful to divide the members in various categories and sub-categories. Member categories are depend on the type of organization / library which serving to the users and users can be divided in various kinds of categories. For example, in a School Library there may be following kinds of Member Categories and Sub-Categories:

Categories	Sub-Categories
TEACHERS	PRT/TGT/PGT
STUDENTS	CLASS I – CLASS XII (Even Section-Wise Also)
ADMIN	LDC/UDC/Others



How to Add Categories

- Type Category Name
- Press SAVE Button to Save the Category
- Software will not accept duplicate Category Name

How to Edit Categories

- Click the Search Pane to expand it
- You will see all the Categories added
- Click the EDIT button – Records of the Category will be filled up in the text box
- Modify the Category name and other details
- Press UPDATE Button the save the changes

How to Delete Category

- Click the Search Pane to expand it
- Select the Category(ies) from the right side by clicking checkbox against each category
- You can select/Deselect all the categories in one click
- Press the 'Delete Selected Rows' – all the categories will be deleted.

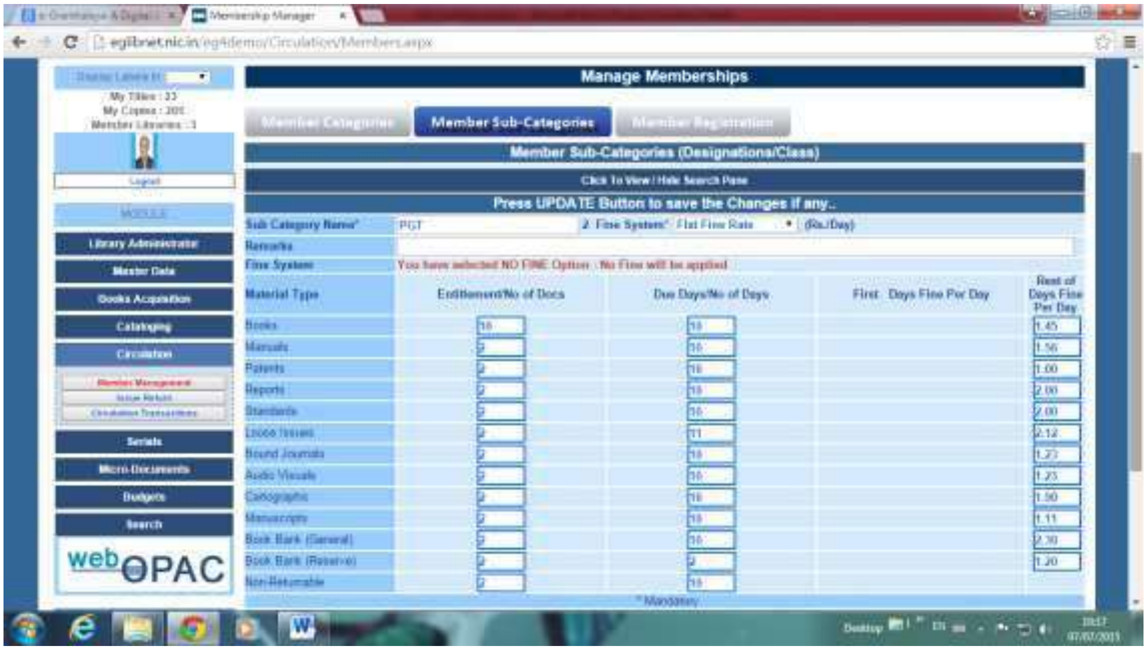
<u>NOTE</u>: In case you have added / registered any member and used the category which you wish to delete then selected category will not be deleted. First you need to de-categories the member and then you can delete Category/Sub-Category.

Print / Report of the Categories

- Click the Search Pane to expand it
- Search the existing categories by various parameters or without any parameter
- Once results come in the search grid then you can generate various kinds of reports by pressing the appropriate Report Button
- You can select desired format of the report – Summary /Detailed Report and Format – PDF/DOC/HTML

9.1.2. Member Sub-Categories (designation of Members)

After creating Member Categories, you can create Member Sub-Categories. Member Sub-categories also depend on type of library as given on the above heading. While creating member Categories, you need to define their entitlement (no of books to be issued / for how many days / fine rates).



How to Add Sub-Categories

- Click the Sub-Category Tab
- Enter sub-Category Name
- Select the Fine System :-
    - Flat for uniform rate for all the days /
    - Variable Fine Rate – Fine Rate for first N Number of Days and Then fine rate for rest of days
    - No Fine
- Enter Entitlement (No of documents to be issued) for all kinds of documents
- Enter Due Days for all kinds of documents
- Enter Fine Rates
- Press SAVE Button to save the record

NOTE: There is no Fine for 'Non-Refundable' Category.

How to Edit Record

- Click the 'Search Pane' to expand it
- Press SEARCH Button to search existing sub-Categories
- Press EDIT Button to edit the selected Record
- Change the details and press UPDATE Button to save changes

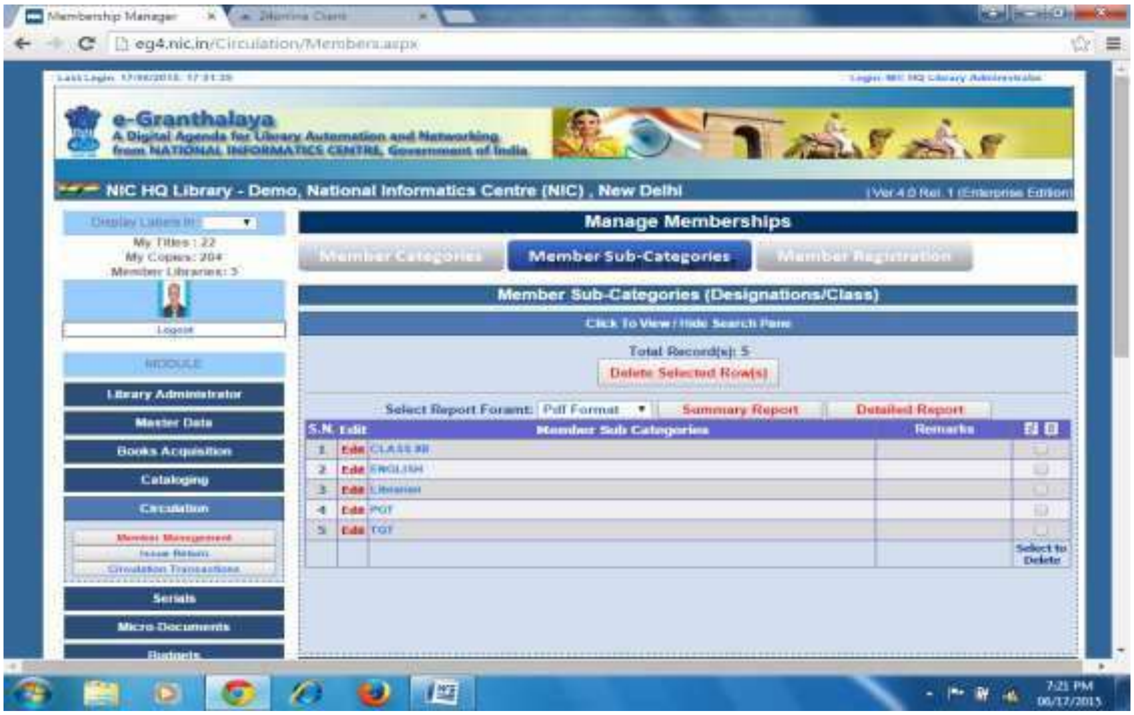
How to Delete Sub-Categories

- Click 'Search Pane' to expand it
- Search Sub-Categories by pressing SEARCH Button
- Select the Record which you wish to delete
- Press 'Delete Selected Row' Button the delete the Records

NOTE: In case any member has been registered using a sub-Category then such records will not be deleted.

How to Generate Report

There are various Reports button which are visible if records are displayed in the Result Grid – press the Report Button to generate Report of various format.



9.1.3. Member Registration

After creation of Member Categories and Sub-Categories, now you can register the members under third tab – Member Registration Tab as seen in the following screen.

Search Member Records

- You can search existing members by clicking 'Search Pane'
- Press Search Button to display existing members
- Use various parameters for filtering member records

How to Add New Member

- Enter Member No, Member Name and other details in the form given at the bottom of the form
- Enter Mandatory Fields
- Enter Member Mail (to receive messages in mail on every issue/return and other messages from library).
- Select Member Category and Sub-Category from drop-down – In case wish to add more categories/sub-categories then add these under first and second tab of the same form
- Enter ADMISSION DATE and CLOSING DATE in dd/MM/yyyy format. Closing Date may be given any date of future (retirement date or school / college leaving date). System will do the transactions between these two dates.
- OVER-RIDE:- Yes means circulation Rules, No. of books to be issued to this member will be over-ridden and un-limited copies can be issued.
- SUBJECT and KEYWORDS are used to generate SDI service for the members to generate list of books available in library collection on these topics. (Optional).
- STATUS- must be CURRENT for new Members. Later, you can change the status as CLOSED if required – no books will be issued to members with status other than CURRENT.
- Maximum Reserve – Set the value in digits as no. of reserved copies allowed.
- Send ALERT in mail? Yes or NO to send many kinds of alerts in future.
- Send REMINDER Yes or No
- Allow ONLINE Issue / Reservation to members on OPAC after member Login. Such members will be able to reserve the copy while searching OPAC.
- Can add photo image of the member. Image file type must be gif/jpg/png only and name of the file should not contain lengthy name, only with alpha-numeric characters (due to security)
- Browse Member PHOTO upto 90 KB File in image format for uploading. You must compress the size of the member photo (thumb nail size) 1x1 inches only to save the space.
- SET PASSWORD – if YES then on SAVE/UPDATE a password will be set for member and will go in his/her mail where he/she can Login OPAC.
- Press SAVE Button to save the record

How to Edit Member Record

- Click 'Search Pane' to expand it
- Press SEARCH Button to search the members
- Press EDIT button at selected record
- Change the details and press UPDATE button to save the changes

How To Generate Report

- Search the members under 'Search Pane'
- Press Report button to generate the Report in various formats

How to Delete Member Records

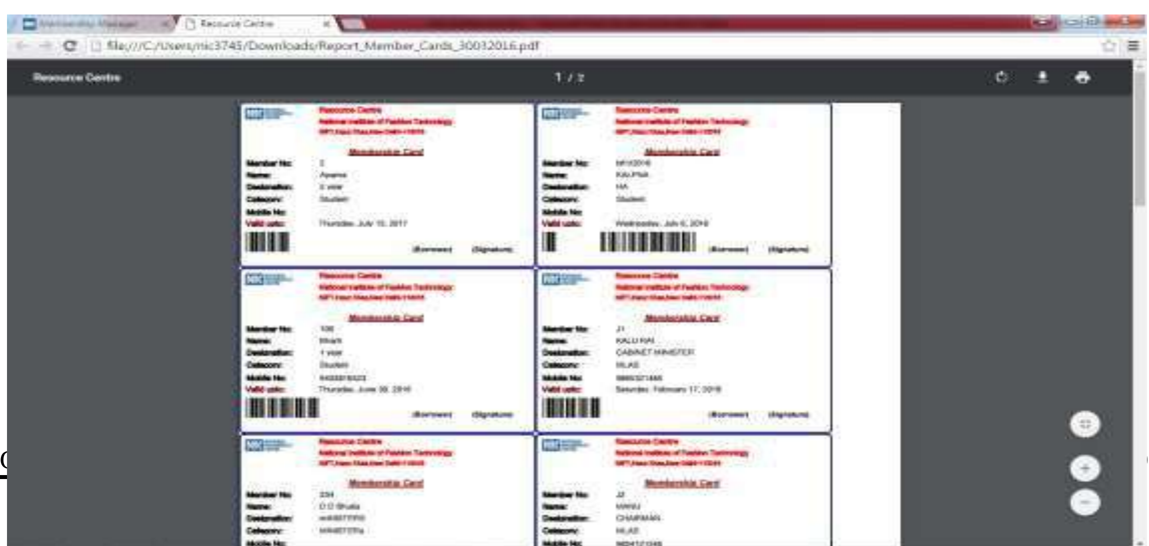
- First delete all the transactions of the members from 'Circulation Transaction' form
- Delete all other references of the member if saved in any other modules
- Select the Record after SEARCH under Search Pane
- Press 'Delete Selected Row' button to delete the selected record
- You can select format of the card from drop-down given on the form, format may be pdf or doc type.
- Also, we have added six different designs of the member cards which can be selected from drop-down.

How to Generate Member Cards

- Go to Search Pane
- Search the Members using various parameters
- Once Results appear in Grid – select all records by clicking SELECT Image at the right side/top of the Grid
- Press "GENERATE MEMBER CARDS OF SELECTED RECRODS" – Member Card will be displayed

<u>NOTE</u>: You can upload Logo of the Organization in 'Update Library Profile' Form under LIBRARY ADMINISTRATION Module. This logo will be displayed on the Member Cards

<u>NOTE</u>: There are 7 Design of Member Cards added with different Looks. These designs can also be printed at Card Printer available in the market where plastic cards are generated.

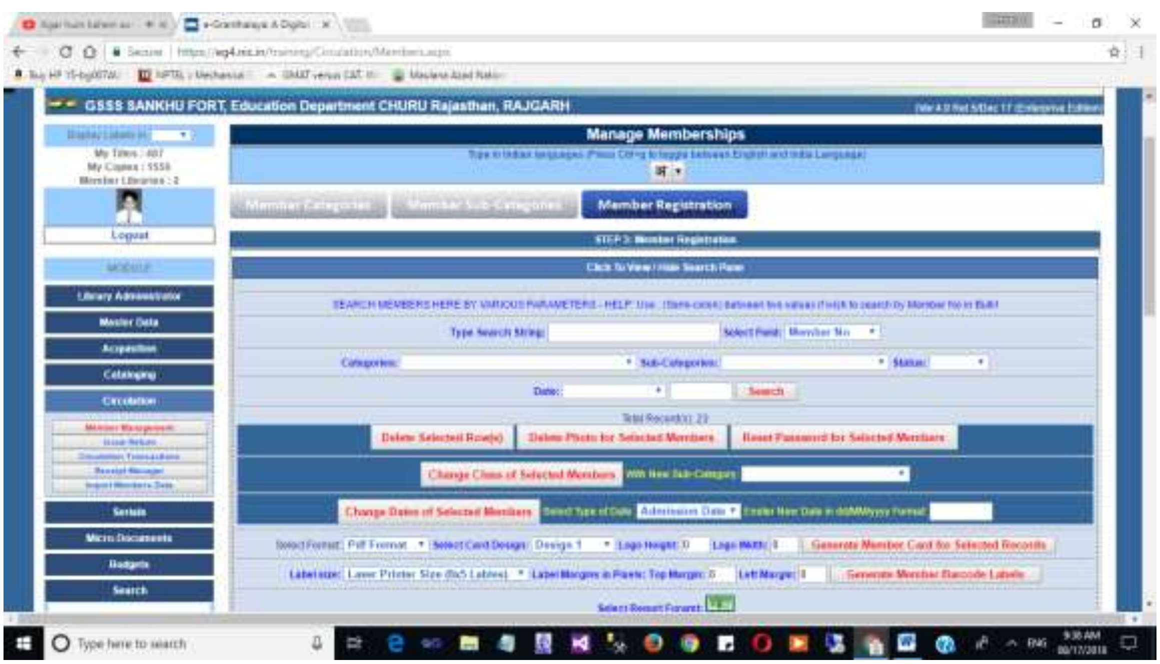


NOTE: There are various design of generating the Member Card – you can select the desirable card design from drop-down. Before generating member cards, you need to test the card with barcode scanner – whether barcode is reading or not. Also, barcode report may be generated in PDF format or in DOC format – select the format from drop-down while generating member card.

NOTE: Before generating Member Cards, barcode generated on each card must be tested for reading by Barcode Scanner.

How to Delete Photo of Selected Members with Single Click?

- Go to Member Management Form under CIRCULATION Module
- Go To Member Registration Tab
- Click to 'View / Hide Search Pane' – it will expand the form
- Search desired members by selecting various parameters given.
- Press SEARCH Button, Result will appear in Grid
- Select Members for which you wish to delete photo, in default all members in results are selected
- Press 'DELETE PHOTO OF SELECTED MEMBERS'



How to RESET Password of selected members with single click for using OPAC?

- Go to Member Management Form under CIRCULATION Module
- Go To Member Registration Tab
- Click to 'View / Hide Search Pane' – it will expand the form
- Search desired members by selecting various parameters given.
- Press SEARCH Button, Result will appear in Grid
- Select Members for which you wish to reset PASSWORD, in default all members in results are selected
- Press Button – RESET PASSWORD FOR SELECTED MEMBERS

- Password of selected members will go in their mail.

How to generate Member No Barcode Labels to be pasted on Member Cards separately?

- Go to Member Management Form under CIRCULATION Module
- Go To Member Registration Tab
- Click to 'View / Hide Search Pane' – it will expand the form
- Search desired members by selecting various parameters given.
- Press SEARCH Button, Result will appear in Grid
- Select Members for which you wish to generate member no barcode labels, in default all members in results are selected
- Press Button – GENERATE BARCODE LABELS OF SELECTED MEMBERS
- Barcode labels can be printed on laser printer
- Member Barcode labels can also be printed on Barcode printers if PRN is provided of the same printer.

How to change Class / Sub categories of selected members in bulk ?

- Go to Member Management Form under CIRCULATION Module
- Go To Member Registration Tab
- Click to 'View / Hide Search Pane' – it will expand the form
- Search desired members by selecting various parameters given or by selecting a particular Class or Sub-Category
- Press SEARCH Button, Result will appear in Grid
- Select Members for which you wish to change class or sub-category, in default all members in results are selected
- Select new Class or sub-category where selected members to be assigned.
- Press Button – CHANGE CLASS OF SELECTED MEMBERS

How to change Closing DATE of selected Members in Bulk?

- Go to Member Management Form under CIRCULATION Module
- Go To Member Registration Tab
- Click to 'View / Hide Search Pane' – it will expand the form
- Search desired members by selecting various parameters given.
- Press SEARCH Button, Result will appear in Grid
- Select Members for which you wish to Change CLOSING DATE in Bulk, in default all members in results are selected
- Press Button – RESET PASSWORD FOR SELECTED MEMBERS

9.2. Issue / Reserve / Renew and Return

This Form is used to Issue and Return the documents in the Library as well as to Renew and Reserve the documents if already issued. This form can be loaded by clicking the

'Issue/Return' button from the left side main menu under CIRCULATION Module:-

NOTE: All kinds of documents entered in the software (Books and Monographs/Reports/Manuals/Bound Volume of Journals/Loose issues of the Journals/Audio-visual materials – everything will be issued here on this form.

Conditions for Issue

Before using the form for Issue of the documents, it is necessary to know that those documents can only be issued which will passed through the following four rules/parameters:-

- ✓ The Member Closing Date should not be in the Past
- ✓ The Number of Books can be issued must not be equal or lesser than the Number of documents already issued
- ✓ The document STATUS must be 'Available' only
- ✓ The documents should not belong to 'Reference Collection.

These all four parameters are displayed during issue of the documents and in case ISSUE Button is not enabled then it means any of these conditions are not passed.

How to Issue or Reserve the documents?

- Enter/Scan the **Member No** when cursor is in MEMBER NO text box or select Member Name from Drop-down given under STEP 1 on the form – press Tab or enter – If member no is correct and exists in the database then member details will be filled in
- Select the Type of Documents options given on the top of the form – (a). Books and Bound Journals and (b). Loose Issues
- Type Accession No (if Books and Bound Journals selected) or ITEM ID (If Loose Issues selected) – Press Enter or Tab – If no is correct and exists in database the documents details will be filled in
- Check the optional check boxes given on the bottom of the screen for (a). Send **SMS** (b). Send **Email** and (c). Generate **Gate Pass** for some other utility while issue the documents.

- Press ISSUE Button to issue the documents

NOTE: In case ISSUE Button is not enabled then check the four parameters listed above and see the Member Closing Date / Entitlement and Already issued books / Book status and collection Type.

Once document is issued then the issued document list if visible at the bottom of the screen where you can generate various Reports in different format. In case, there is any message or error during Issue/Reserve then it is displayed on the form in yellow color. Detail of recently issued book is also displayed on the issue screen.

How to Reserve Documents

- **RESERVE** – Reservation of the documents is done only when the same document is issued to any other member and document Status is ISSUED.
- While any member will return the books which is RESERVED to any member then a message will be displayed – giving details of the Reserve Members. In case, many members have reserved the same documents then message will be in the order of Reservation.
- Press RESERVE Button to reserve the document
- You can UN-RESERVE documents if user does not want the get the book. For this you need to select the record from issued documents displayed at the bottom of the screen and press UN-RESERVE button.

Generate Reports

- While doing issue / return / reserve / renew then you can generate various kinds of Reports by pressing the REPORT Button.
- Reports can be grouped by various fields and parameters
- Reports can be sent to printer directly or can be saved in PDF/DOC/HTM format

How to Return and Renew?

- There is separate TAB for Return and Renew on the same Form – Click RETRUN and RENEW Tab
- Type Accession Number in the Text Box either by typing by hand or by scanning barcode labels pasted on the issued documents.
- Document details will be displayed if it is issued. Three types of details – document details; Circulation details and Member details
- Select other Options like a). Send SMS b). Send EMAIL and 3). Generate Fine Receipt if fine is calculated and you have defined Fine rates in Sub-Category Form
- Press RETURN Button to Return the document or press RENEW Button to renew the document.

NOTE: In case you wish the **RENEW** the documents – then it must be done before due date. In case, due date is passed away then you must RETURN the book and then fresh ISSUE should be done.

NOTE: In case barcode labels are pasted on the documents and member cards then barcode scanner can be used to enter data during issue/reserve/renew and return

How to Take Fine?

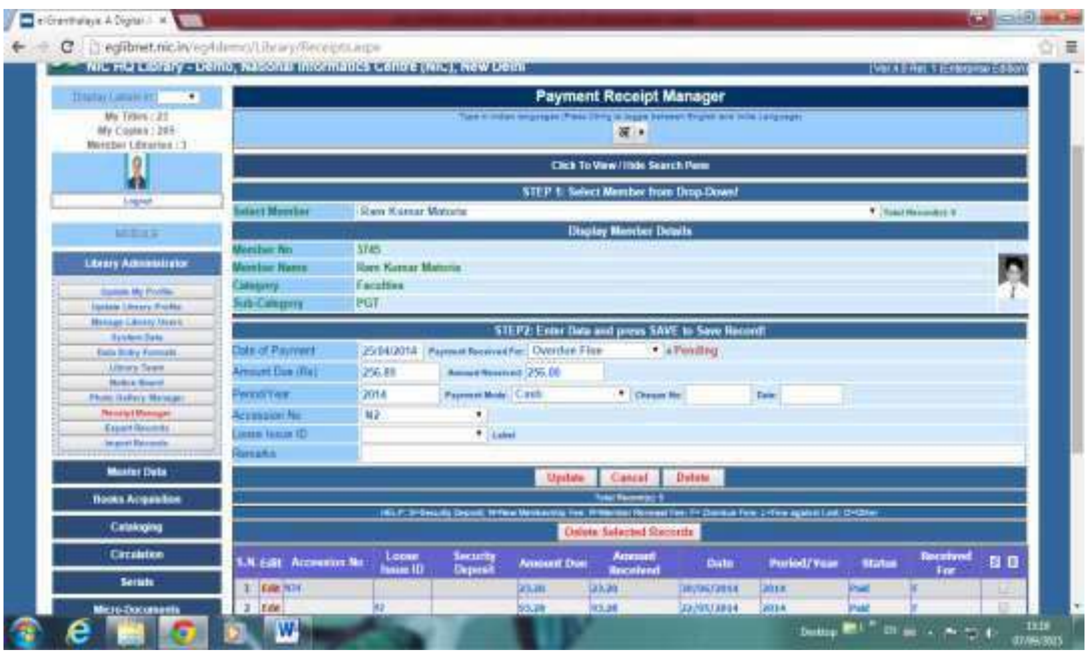
- First Fine Type and Rate per day must be defined under SUB-CATEGORIES in Circulation module.

- While RETRUN of the documents – if Fine is defined and document is overdue then FINE will be calculated by system.
- You may exempt the fine on this form by selecting the option 'Exempt Fine' .
- Enter the Fine in the text box – Fine Collected to save the fine taken in the database.
- Here you can print the FINE Receipt by selecting the option given on the form – 'Generate Fine Receipt'
- Press RETURN button to process the data.

NOTE: In case member is willing to pay the fine in partial then system will keep the status of the Fine Records with the status 'Pending'. Such Records can be managed in RECEIPTS Form under LIBRARY ADMINISTRATOR Module.

How to Manage Payment received from Members

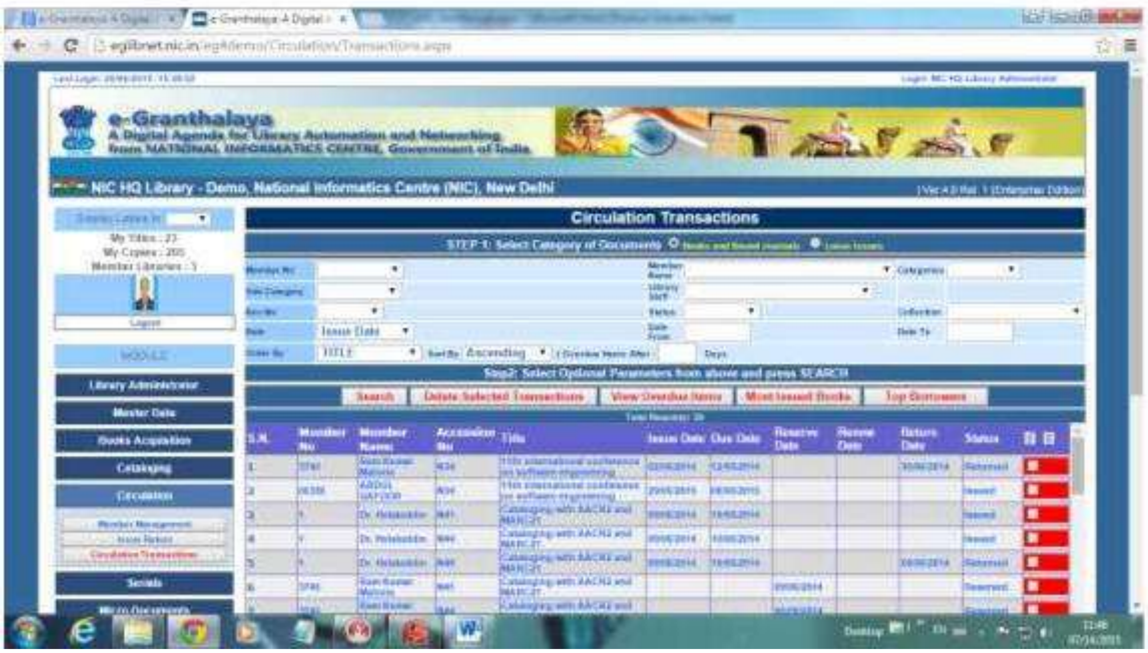
- Library can receive payment form Members for the following:-
  - Annual Membership Fee
  - Membership Renewal Fee
  - Overdue Fine
  - Payment against lost of book
  - Other charges
- Load the 'Receipt Manager' form under LIBRARY ADMINISTRATOR MODULE
- Select the Member Name from drop – down
- All the records of payment of selected member will be displayed in the grid
- Select Pending Record and press EDIT button
- Enter the details of the payment / partial payment being received
- Press UPDATE Button



NOTE: Various kinds or Reports may be generated on this form in PDF/DOC/HTM Format. Total Payment received for a particular head in a year can also be generated.

9.3. Circulation Transactions

This form is used to search Circulation Transactions performed during issue/return of the documents at circulation counter. User may search the transactions by using various parameters given on the form. The form can be loaded by clicking the View Transaction button from main menu:



Besides, this form can be used to view Overdue books based on cut-off dates and even with no of days in advance and then overdue notice can be printed or sent in mail.

How to Search

- Select / Type the search parameters if any u wish to use
- Press SEARCH Button
- Results will appear in the Grid
- Then you can generate various kinds of Reports given on the form

Delete Circulation Transaction

- Search the Transaction
- Select Records from results (Click from right side top corner of the Grid) – you can select/deselect all
- Press DELETE TRANSACTION Button

View Overdue Items

- Press VIEW OVERDUE ITEMS button
- Optionally you can type the **No. of Days** in advance you wish to generate overdue notice.
- Select the Overdue Notice Letter Template from bottom

- Press PRINT REMINDER button to generate Reminders in Print. You can also select Format of the Reminder like DOC / PDF / HTM
- You can also send the overdue notice by EMAIL also.

Send Gentle Reminder in Advance – A Gentle Reminder/Notice can be sent to the members whose books are going to become overdue after certain days which can be entered in the text box given on the screen – DAYS in ADVANCE. Once you type after how many days e.g. 4 – means after 4 days books will become overdue – search the result by pressing "VIEW OVERDUE ITEMS AFTER… Button . Once result appear then you can PRINT the reminder in Print or can send in mail by pressing the appropriate button.

Most Issued Books – List is generated by No of times books are issued to get what are the books issued maximum times.

Top Borrower – List of Top borrowers can also be generated who has issued maximum number of books in a library

Workload Report – This report can be generated within the cut-off dates – once results appear then press WORKLOAD REPORT.

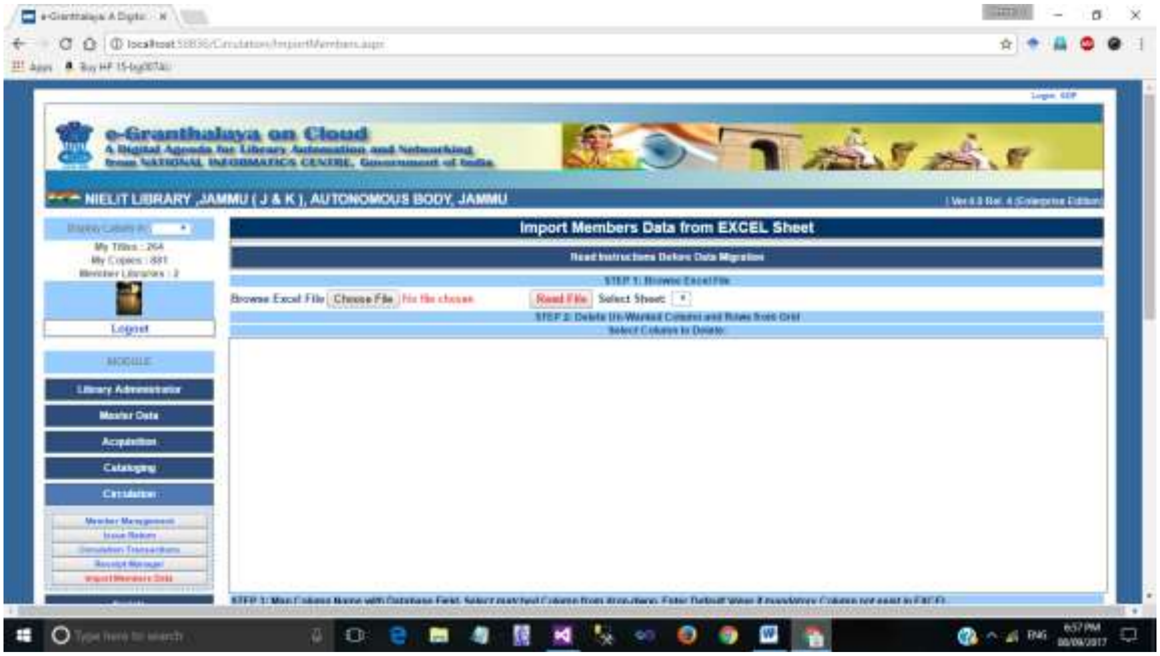
<u>**NOTE**</u>: While generating overdue notice, you need to select a 'Overdue Notice Letter' Template which can be created once in ADMIN Module.

9.4. Import Members Data from EXCEL

eG4 provides facility to import members data from EXCEL file. Excel File must be with .xlsx extension Excel workbook). In case, it is not in this format then open the file and SAVE AS excel workbook. The EXCEL file must contains the following COLUMNS:

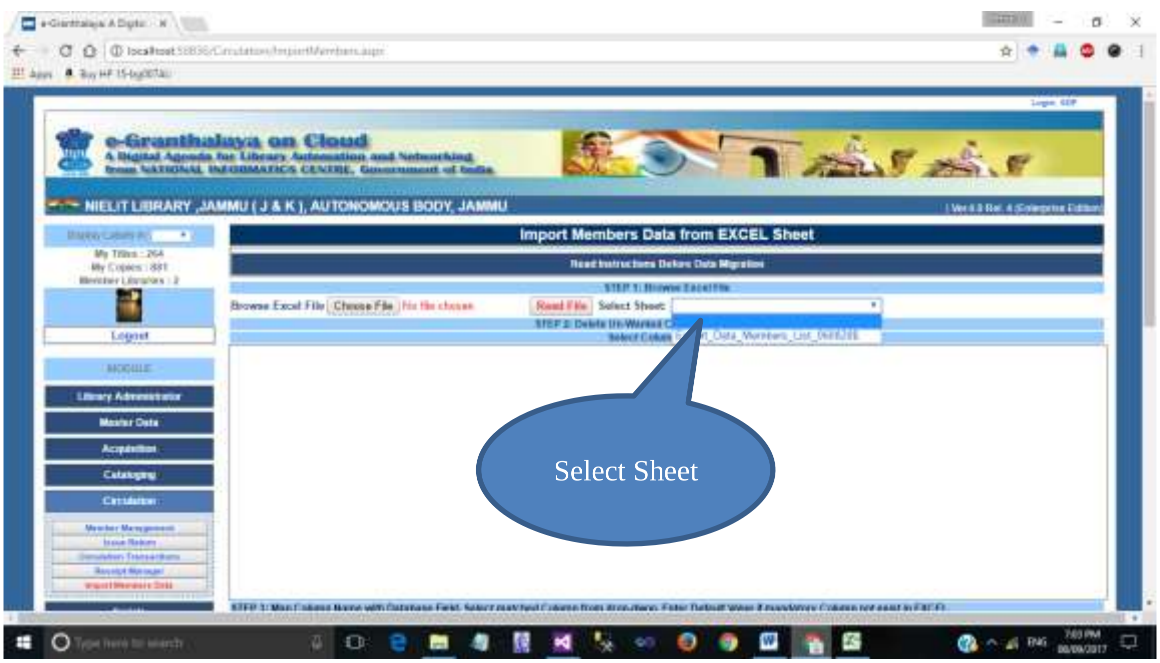
- **MEMBER NO** – may be alpha only / numeric only or Alpha-numeric. No space between characters - Mandatory
- **MEMBER NAME** – without Title - Mandatory
- **GENDER** (M/F only) - Mandatory
- **CATEGORY** – if same category for all records then you can type Category in DEFAULT Value Text box and do not select Category from drop-down - Mandatory
- **SUB CATEGORY** – same as above for DEFAULT Sub Category - Mandatory
- **PHONE NO** - Optional
- **MOBILE NO** - Optional
- **EMAIL** – only single mail - Mandatory
- **ADMISSION DATE** in MM/dd/yyyy Format - Mandatory
- **CLOSING DATE** in MM/dd/yyyy Format - Mandatory
- Other fields are Optional.

STEP 1: Click the Link / Button 'IMPORT MEMBER DATA' from Main menu under CIRCULATION Module – following form will be loaded



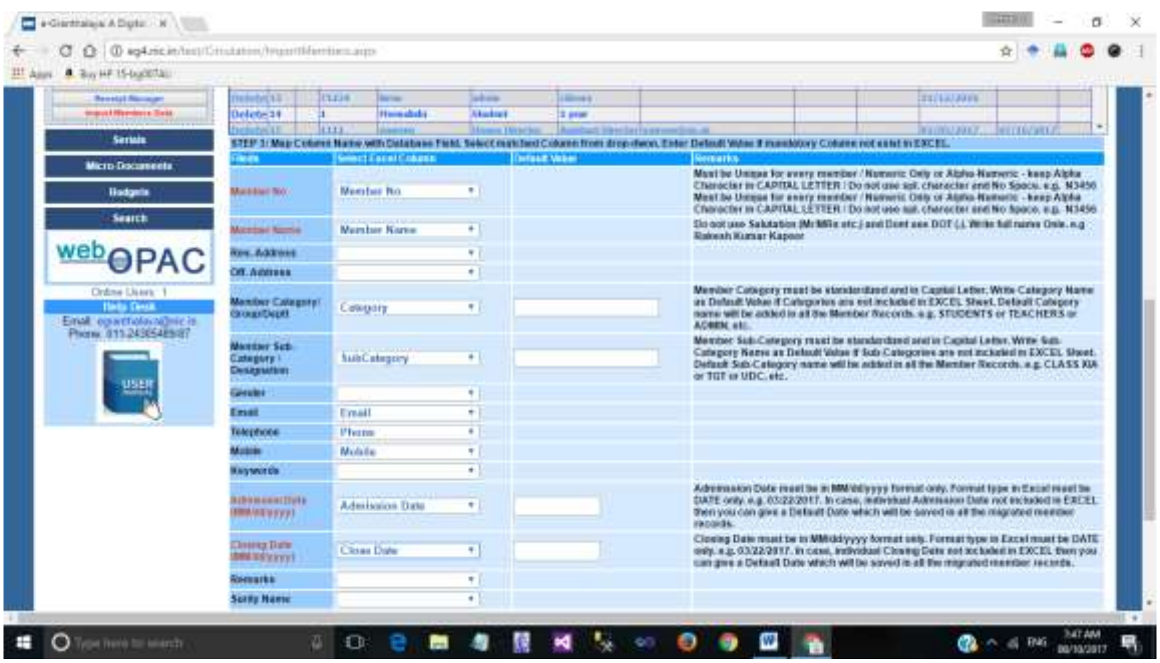
STEP 2: Press CHOOSE File to browse the excel file from your desktop – select File and press OK. Plz note that Excel file must be EXCEL WORKBOOK with .xlsx extension. If not in this format then open the excel file and SAVE AS Excel Workbook.

STEP 3: Read File – Excel sheet drop-down will be filled with sheets.
STEP 4 – Select Sheet from drop-down



Once you select the excel sheet from drop down – records are filled in Grid.
You can delete un-wanted Columns here by selecting from Grid and press Delete Column button. Similarly, you can delete un-wanted rows if requie.

STEP 5: MAP THE FIELDS WITH APPROPRIATE COLUMN – By selecting Column from each drop-down. In case no column exists for a mandatory field then you can give value in default text box – this value will be saved in all records during migration.



STEP 6: Press Verify button to verify the records before migration.
STEP 7 – Finally Migrate data. See the report

NOTE: After migration, edit every migrated record if required.

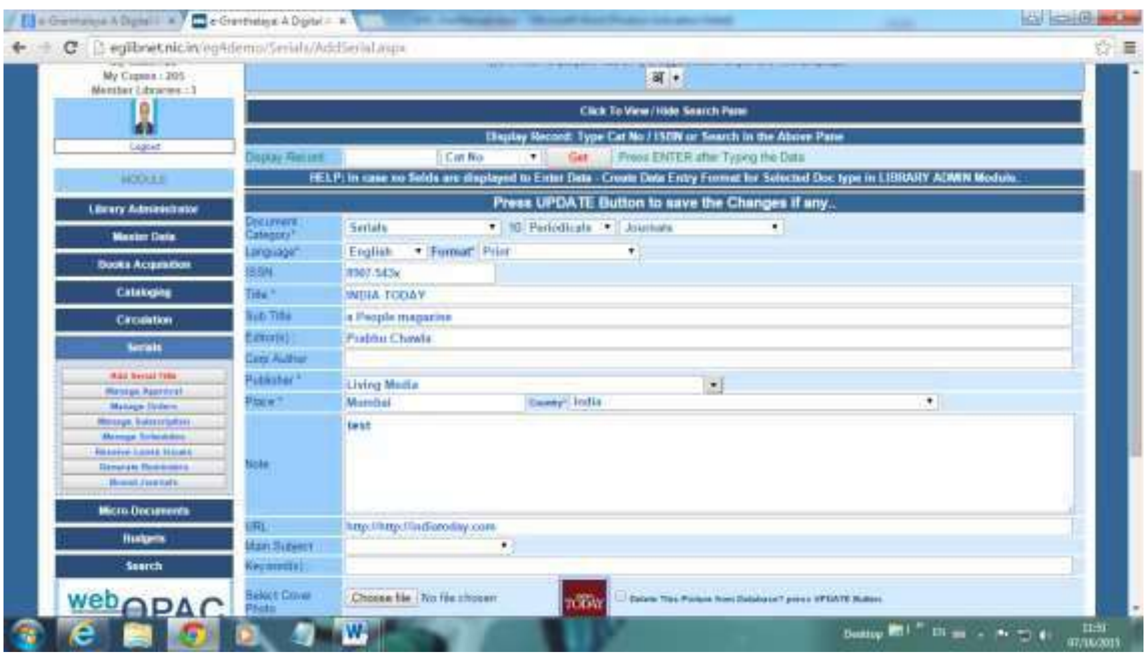
Chapter 10
Serials Module

This module is used to manage Subscription of the Journals and Magazines in the library. The module must be used starting from first menu to last menu and no item must be left to complete the workflow of serials subscription in a Library. It is started from taking approval for new/renewal of subscription up to making payment and receiving loose issues. The module will manage the following activities:-

- Add new Serials (Journals, Magazines and Newspapers)
- Manage approval for new subscription and/or subscription Renewal
- Manage Orders
- Manage Subscription
- Manage Schedule of the Loose Issues
- Receive Loose Issues
- Send Reminders for Non-Receipt of the Loose Issues and
- Manage Bound Volumes of the Serials

10.1. Add New Serial

This form is used to add the details of the new Serials (Journals, Magazines and Newspapers). The form can be loaded by clicking the Button – 'Add Serial' from main Serials Menu:-

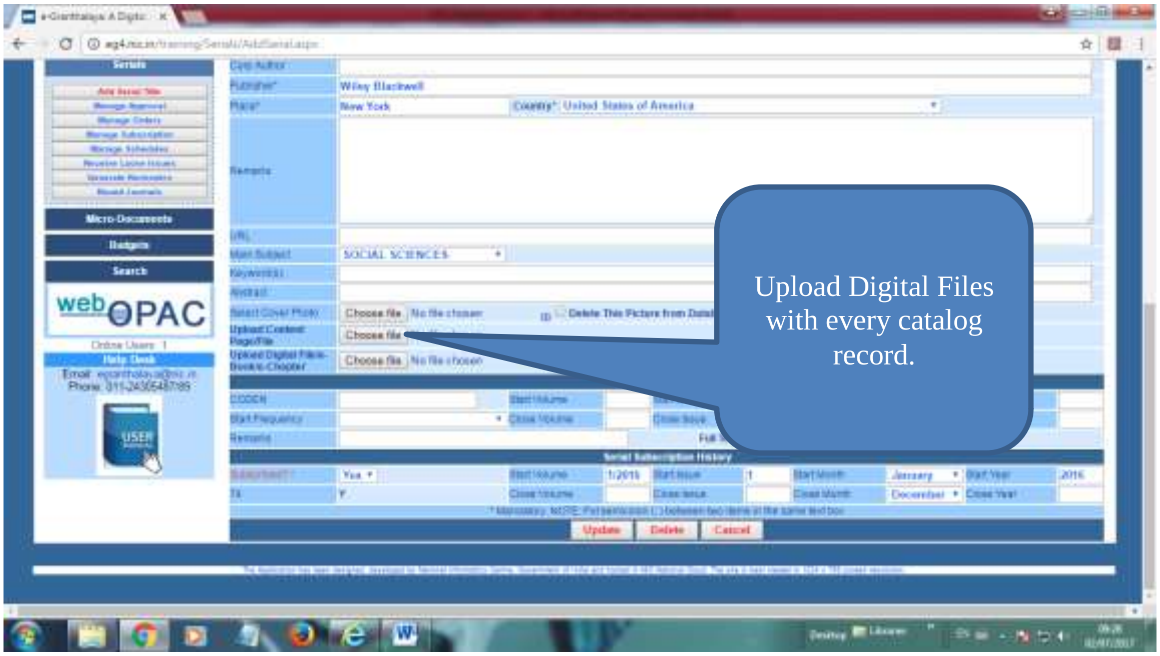


Search Existing Serials

- User can search / view existing records of the serials under SEARCH Pane – click the Search Pane given on the top of the form.
- Use various search parameters for filtering the records
- Press SEARCH Button
- Once results appear then you can various activities like EDIT/DELETE/PRINT etc.

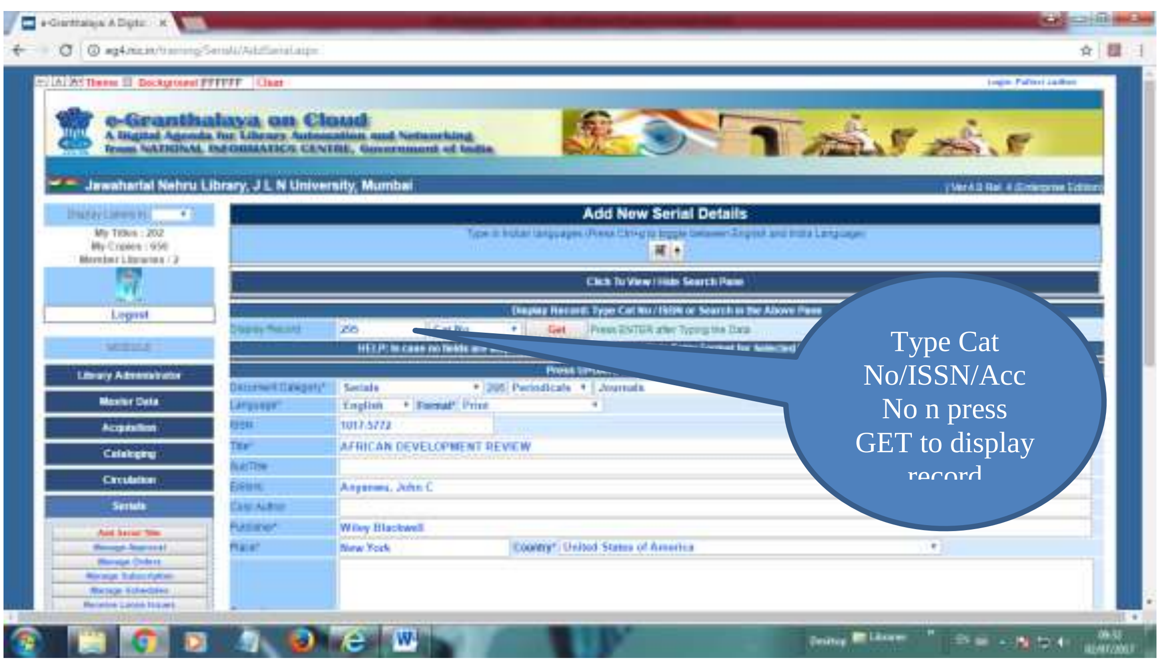
How to Add New Serials

- Type the Serials Details in the form
- Select Document Category (Serials) – Select Sub-Category from (Annuals / Newspapers/Periodicals) and then Select document Type (Journals/Magazines, etc.) from drop-down.
- Add text in the text boxes given on the form as per cataloging rules.
- Wherever Drop-down is there – value must be selected from existing entries visible in the drop-down
- Publisher must be selected from Drop-Down. In case, it is new publisher then add its proper name in the drop-down itself from where it will be saved in Master Table.
- Select Subject from drop-down. In case, no subject exist in the drop-down then add new Subject details in Master Table under MASTER DATA Module.
- In case you wish to subscribe the Journals then select YES from 'Subscribed?' drop-down given in the bottom of the screen.
- The Fields mark with * are mandatory
- Press SAVE button to save the record
- Digital Files can also be uploaded at the time of SAVE/UDATE of the records. There is a Browse Button at bottom of the Catalog Record where you can browse digital file and select for uploading. Multi-Files can be uploaded with single record.



How to Edit Serials

- Search the Serials under 'Search Pane'
- Once results come then press EDIT button of the desired serial
- Change the data and press UPDATE Button to save the changes
- OR
- Type Catalog Record no / ISSN/Accession No in the search Text Box and press GET Button to display the record.
- Once Record is displayed then modify it and press UPDATE to save the changes.



How to Delete Serial Record

- Search the Serials under 'Search Pane'
- Select desired result from grid by clicking in the right side of the grid

- Press Button – DELETE SELECTED TITLE
- During display of individual Title in the form – you can DELETE single record by pressing the DELET button given on the bottom of the form

NOTE: Serial Record can only be deleted if its child record does not exist. So, first delete all the loose issues/bound volumes/schedules / subscription and acquisition records and then delete main catalog record.

Report Options – Various Reports can be generated once results appear or display a record. Records can be generated in various formats like PDF/DOC/HTM, etc.

10.2. Manage Approval

This form is used to manage the Approval process where few steps are required to be complete during subscription process of the Serials. The approval process starts by creating a Purchasing / Acquisition Record for each Serial Title every year. In case, Title of the serials does not exists then first add the Serial Title in previous form. Serials are subscribed annually and thus only one Approval record is allowed for every serials during a year.

During Subscription of the Serials – following three steps are required to be completed on this form:-

a). Create a new purchasing/acquisition record for every title with unique Approval No. However, same APPROVAL NO can be used for many titles to club the titles under one approval list during a year.

b). Generate Approval for Approval No in current purchase

c). Update Approval accordingly after getting approval from library committee.

The Approval form is loaded by Clicking the link button – 'Manage Approval' under SERIALS Module, following form is loaded:

Three Tabs are there on the form containing three different part of the form – for each – Add Approval; Generate Approval; Update Approval.

Add New Approval

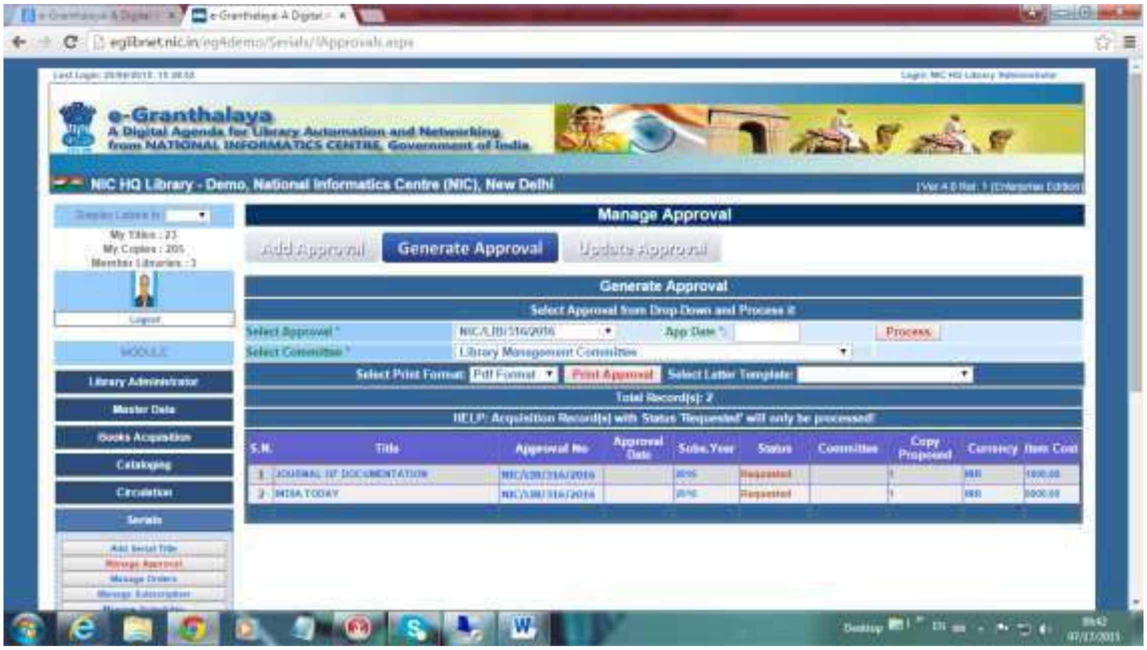
- Select the Title from drop-down to display the Serial record. You can 'Search Record' by many fields and by pressing SEARCH Button given on the top of the form
- Once catalog of the selected Serial is displayed then enter purchasing details in the relevant text boxes. Purchasing record for the selected title which already created/processed will be displayed in the bottom Grid just to show the old history of purchase.
- Mandatory fields are marked with * sign
- Enter Unique APPROVAL NO which has not been used before. Once an App no is processed then same app no can not be used for new purchasing this year or next year. However, same approval No can be used during current year for adding more titles in the same approval list.
- Enter No of copies being subscribed
- Enter **Subscription Year** in each approval Record.
- Select '**Subscription**' from Acquisition Mode drop-down
- Enter Subscription cost of every title during current year in original currency
- Press SAVE Button to save the purchasing record
- This way create a separate Purchasing Record for each title with a same APP NO for purchasing many titles in the same purchase.
- Once purchasing record is saved – it will get displayed in the Grid at bottom which you can EDIT again to change the field value, if any. This can only be done before the purchasing record is processed further for next step – Generate Approval.

NOTE: On creation of new Purchasing Record Status will be 'Requested' Automatically. This status gets changed automatically with the next step.

NOTE: This way you can create new purchasing record for many titles to be submitted for approval, for example if you wish to submit say 100 titles for approval in the same list then create one record for each title with the same APP NO.

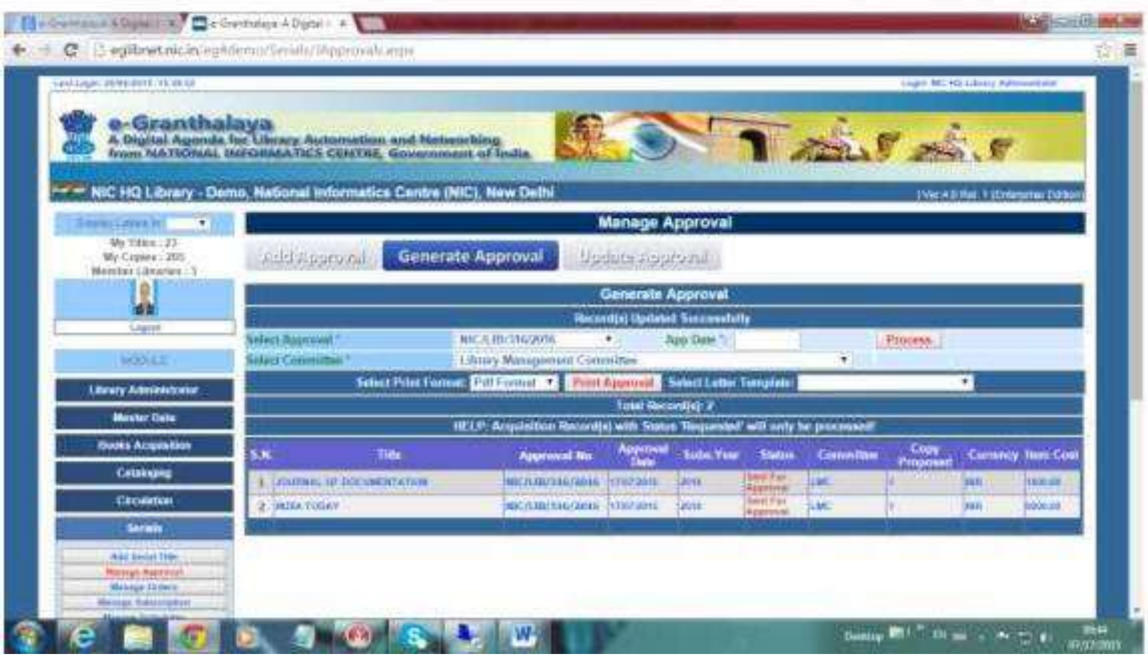
Generate Approval

This tab/part of the form is used to process the Approval Records just added/created in the last step. To view the newly created purchasing record with Status – 'Requested' are displayed in the APPROVAL NO drop-down.



To process these records – follow the steps below:

- Select APPROVAL NO from drop-down
- Purchasing records with the status – 'Requested' will only be available in this drop-down. Once record is processed for further step – it will not available for selection here
- On selection of the APP NO – its title records are displayed In the bottom Grid.
- Select Committee to which list of approval / titles will be sent for approval. In case, Committee name does not exist in drop-down then you need to New Committee in Committee Form under Master Data Module.
- Press the PROCESS Button
- On processing – Status of these purchasing records will become – 'Sent for Approval'

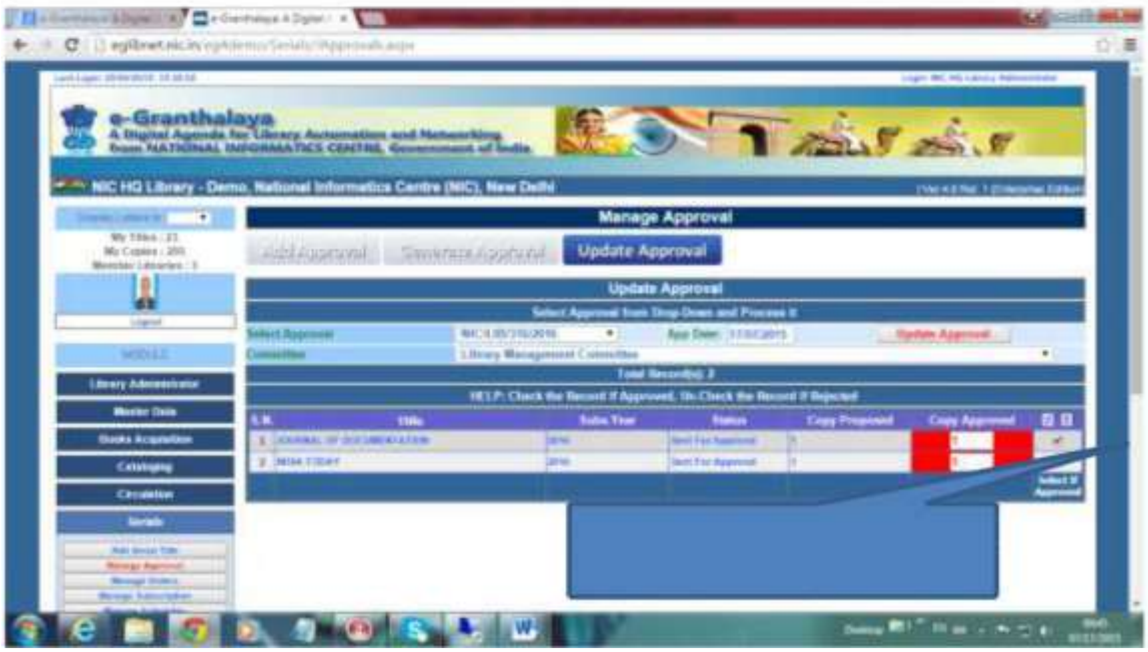


Print Approval List – Once records are processed as above then user can take the print of the approval list as given below:

- Select Print format (PDF/DOC)
- Select Letter Template – if not available then create a letter/Report Template under MASTER DATA Module.
- Press PRINT APPROVAL Button to generate list.
- List can be printed or saved for later use
- The approval list must be sent to the Library committee for approval/rejection of the title purchase. Once file of approval come back then you need to UPDATE same approval as given in the below part.

Update Approval

Once file of approval came back then you can Update it here on this Tab/Part of the Approval form. Go to UPDATE APPROVAL Tab of the form and do the steps further given below.



- Select the APPROVAL NO from drop-down. Here approval records with the Status – 'Sent for Approval' or 'Approved' or 'Rejected' will be available.
- Select the Records from Grid by clicking all given on the right – top corner of the Grid to process
- Select only those Records which are approved by the Committee. While do not select the Records if rejected by the Committee.
- Press UPDATE APPROVAL Button

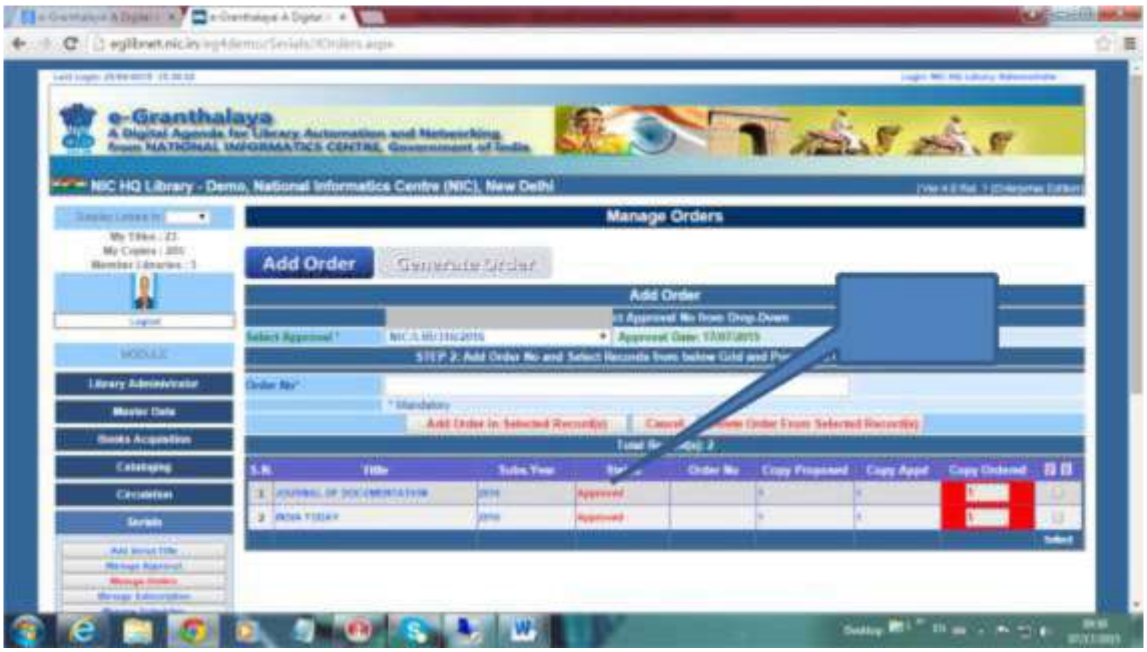
NOTE: The Records which were selected before pressing the above button – their status will changed to 'Approved'; while other records will be marked as 'Rejected'

Now, these records are available for further processing in the next form – Manage Orders.

10.3. Manage Order

Once Serials Subscription/approval process is complete and you update acquisition records set to 'Approved' then all such approved records can be managed under 'Manage Order' form under SERIAL Module. On this form, you will add the Order details in each acquisition record and then will place the order to the desired vendor. Please make sure that you must already added the records of vendor in the Vendor directory – if not done then you need to add vendor details under 'Master Data' Module.

Serial Order Form can be load once you click the button –' Manage Orders' under SERIALS Module- following form will be displayed:



There are two tabs on the form – 'Add Order' and 'Generate Order'. Accordingly you need to complete task in all these two part of the form, one by one, in the same order.

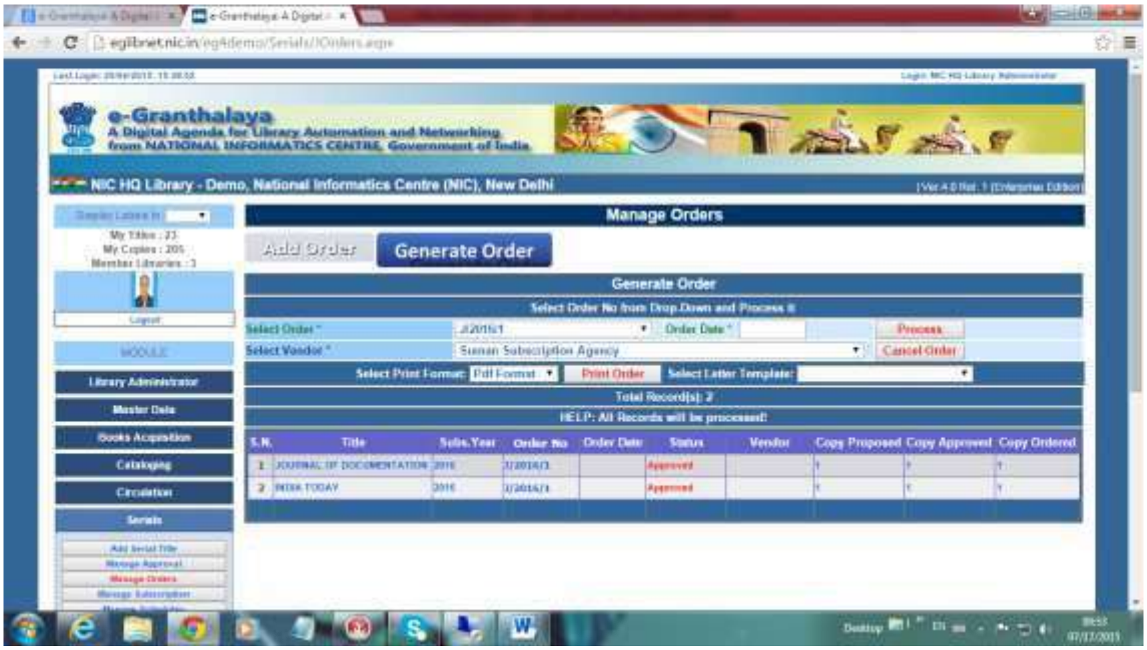
Add Order

- Select Approval Number from drop-down given on the top of the form – all titles approved in the selected approval no will be displayed in the grid at the bottom.
- Type unique ORDER NO – Order no already processed can not be re-used. You can make some pattern for deciding the unique Order No. In case you have approval for say 100 Titles then you can place these titles in many different orders in a group to various vendors.
- Select the Titles from the Right of the Grid to include in the order no. You can press 'Select All' button given at the right top corner of the Grid to select all the titles.
- Press 'Add Order in Selected Record' button to save the data

NOTE: you can delete acquisition records at this stage by selecting the desired record(s) and press 'Delete Order for Selected Records'.

Generate Order

- Go to next Tab –'Generate Order' and select ORDER from drop-down – all records will be displayed in the Grid at the bottom of the page.
- Select Vendor to which you wish to place the Order
- Enter Data of Order in dd/MM/yyyy style – current date will be taken in default.
- Press PROCESS Button to save the data
- The record status will become 'Ordered'
- Take print out of the order by pressing 'PRINT' button



NOTE: You can cancel the Order by pressing 'UnOrder' button given on the above screen. Then again you can add different Order to different vendor and can re-order complete lot.

NOTE: Now you are ready for next step – MANAGE SUBSCRIPTION

10.4. Manage Subscription

This Form is used to Manage the Subscription of Serials Titles (Journals / Magazines / Newspapers) where Subscription Data is entered annually. For the First Year full Data is entered for every subscribed serial – next year on Subscription Renewal some of the data are used and updated automatically.

The Form may be load on clicking 'Manage Subscription' button from the mail menu under SERIALS Module, following form is loaded:

How to Add Subscription Data

- Search or Select Serial Title from Drop-down. Here only those titles will be appearing in Drop-down for which ORDERS are placed in the last step/form under the same Module.
- You can search the existing Titles by various parameters given on the top of the form.
- Once you Select the Title from drop-Down – its details will be displayed on the form in Green Color along with its Image.
- In Step 2: Select the Subscription Year from Drop-Down where all the Years will be filled-in automatically for which this title is being subscribed.

- Once you select the Subscription Year under Step 2 – its acquisition details for that year will be filled-in.
- In the Step 3:- Enter the correct Data in the fields given on the bottom of the form
- Mandatory Fields are marked with * - must be entered
- **Subscription Start** and **End Date** must be entered correctly in dd/MM/yyyy format. Subscription may be for more than one year.
- Enter First Issue Date in dd/MM/yyyy format – All these dates must be taken from last issue of the serial.
- Enter other fields correctly
- Press SAVE Button to save the record

NOTE: In case such data was entered during last year subscription of the same title then the data in every field will be updated automatically on pressing the '**GET DATA FROM PREV YEAR**' button, however, before saving the record you must check its correctness.

NOTE: On the basis of this data – Automatically Schedule will be created in the next step/form. In case, Schedule is not created as per desired dates then you can edit this data again and can re-generate the schedule correctly in the next step/form.

How to Edit Subscription Data

- Search Title with various parameters on this form
- Select Title from Drop-down – On selection of Title its details will be filled-in on the form
- Select Subscription Year from Drop-Down – its subscription Details will be filled-in at the bottom of the form
- Change the Data
- Press UPDATE button to save the changes

NOTE: Now you are ready for next Step /Form – MANAGE SCHEDULES

10.5. Manage Schedule

This form is used to generate the Schedule of publication of loose issues to be published for a Title during your Subscription Period. Once you generate schedule then it becomes possible receive the loose issues as given in the next heading. The form is loaded once you click the 'Manage Schedule' Button from main menu of the SERIALS Module:

How to Generate Schedule

- Select Subscription Year from Drop-Down on the top of the form. In case, there is no entry in the drop-down then it means you have not completed the previous steps under SERIALS module.
- Once you select the Subscription year then all subscribed Titles will be available in the TITLE drop-down – select the desired Title
- All details will be displayed on the form
- Subscription Details are saved in the previous form – Plz make sure that these details are correct.
- Press GENEARATE SCHEDULE Button. – It will generate the possible schedule for loose Issues.
- In case, you feel that schedule is not correct then you can delete all the records by pressing DELETE SCHEDULE Button and then re-Generate the Schedule again after correction the Subscription details on previous form.
- You can EDIT the particular Record by pressing EDIT button given against each record in the Data Grid at the bottom of the form.
- You can also interpolate/Add/ insert new Record by typing the issue details in the form given on the bottom of the form and press SAVE button to save the record.

- You can Merge two or more issues with a single one – by deleting extra records and Editing single record.
- You insert more records manually, one by one.

Delete Loose Issues Records

- Select Subscription Year from drop-down on the top of the form
- Select desired Title from drop-down
- Select Loose Issue Record from data Grid and press EDIT button.
- Change the data and press UPDATE to save changes

NOTE: STATUS of the new record will be created automatically with **N** letter (N for New), however, you may also change status as **P for Not Published / S=Credit Note Received.** Such Status are required to change so that reminder will not be delivered to the vendor for issues which either not Published (few issues may be suspended) or not received for which vendor has sent credit note to adjust in future.

NOTE: Now you are ready to go to next form – RECEIVE LOOSE ISSUES

10.6. Receive Loose Issues

This Form is used to receive the Loose issues of the Journals for which you have placed the Order to the Vendor and have generated SCHEDULES in the previous form. Click the button – 'Receive Loose Issues' from SERIALS Module in the main menu in left side of the application, following form will be loaded:

How to Receive Loose Issues

- Select Year from Subscription Year Combo given on the top of the form. In case, there is no YEAR in the combo then plz complete the previous steps.
- Select the TITLE from drop-down. In case no title exists in the drop-down then it means you are not subscribing any Title.
- Once you select a Title then its Loose Issues are displayed in the Grid which were generated in last form. In case, there is no loose issues filled in Grid then you need to generate Schedule of the title in previous form.
- Click the SELECT button on the left of the Grid to display the issue details in the text boxes given at the bottom of the form.
- On Click – details of the Issue is filled in text boxes, you must check the details of the issue – if required then you can modify details before receive the issue.
- Enter/Modify the No. of copies being received, if required
- Please select proper Type of Issue – default normal.
- Press RECEIVE Button to receive the issue(s)

NOTE: While receiving the issue, an auto-generated Number will be created for each copy of the issue and will be displayed as message. This No. is called as ITEM NO which must be written on the copy of the issue and this no will be used to issue and return of the issue to members. You may also generate Barcode labels of these numbers if u need.

NOTE: On receiving the issue the STATUS of the Issue becomes Y. You can receive more than subscribed issue. For example, you may be subscribing single copy of any serial but during receiving process you may receive more than one copies of the same issue.

How to In-Receive Copies

In case you have received single or few copies of the same issue and you wish to delete/un-receive copy(is) then follow the steps given above and type the quantity with Minus (-) sign in the 'Copy Being Received' text box. For example type -1 to un-receive one copy from the copies already received.

10.7. Generate Reminder for Non-Receipt Issues

This Form is used to generate the Reminders for Non-Receipt of the Loose Issues. The Reminder will only be sent once Titles are ordered. The reminder will be sent by mail to the Agency or in Print. Bulk reminder is also possible to send for all the overdue loose issues. The form can loaded by clicking the link button – Generate Reminder from SERIALS module.

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How to Generate Reminder

- Non-Receipt Issues will be filled in the Data Grid once you press SEARCH Button.
- Once list appears in the Grid then you can print the Reminder
- If you wish to send the reminder by mail then reminder will be delivered in Agency mail address saved in the VENDOR directory.

NOTE: You must create 'Reminder Letter' template in 'Letter Template' form under Master Data Module.

10.8. Bound Journals Data Entry

This form is used to add/edit entry of Bound Volumes of Journals where Accession Numbers have been assigned to each bound volume.

Add New Bound Volume

- Load the form and select Journal Title from drop-down
- All details of the journal will be displayed
- Enter details of the bound volume
- Press SAVE button to save the record

NOTE: You must use J or P as alpha device with Accession No to differentiate from Books accession Number.

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Edit Bound Volume

- Load the form and select Journal Title from drop-down
- All details of the journal will be displayed
- All bound volumes already entered will be displayed in a Grid on bottom side
- Press EDIT button from Grid to Edit the recrod
- Change details of the bound volume
- Press UPDATE button to save the changes

Delete Bound Volume

- Load the form and select Journal Title from drop-down
- All details of the journal will be displayed
- All bound volumes already entered will be displayed in a Grid on bottom side
- Select the desired Record(s) from right side with check-box option
- Press DELETE SELECTED RECRODS button

Print Bound Volume List

- Select Particular Journal from drop-down list
- All bound volumes will be displayed in a Grid at bottom
- Press Print/Report button to generate the various Reports.

Chapter 11
Micro Documents Manager

This module is used to manage Micro-Documents in the Library. Micro-Documents are the parts of full documents, for example, Chapters from Books and Monographs; Articles from Journals; Stories from Magazines and News Items from Newspapers. Modules provides facilities to index these micro-documents in the software and then search these in OPAC. Full Text documents in PDF format or other formats may also be uploaded along with their meta-data records.

Micro-documents

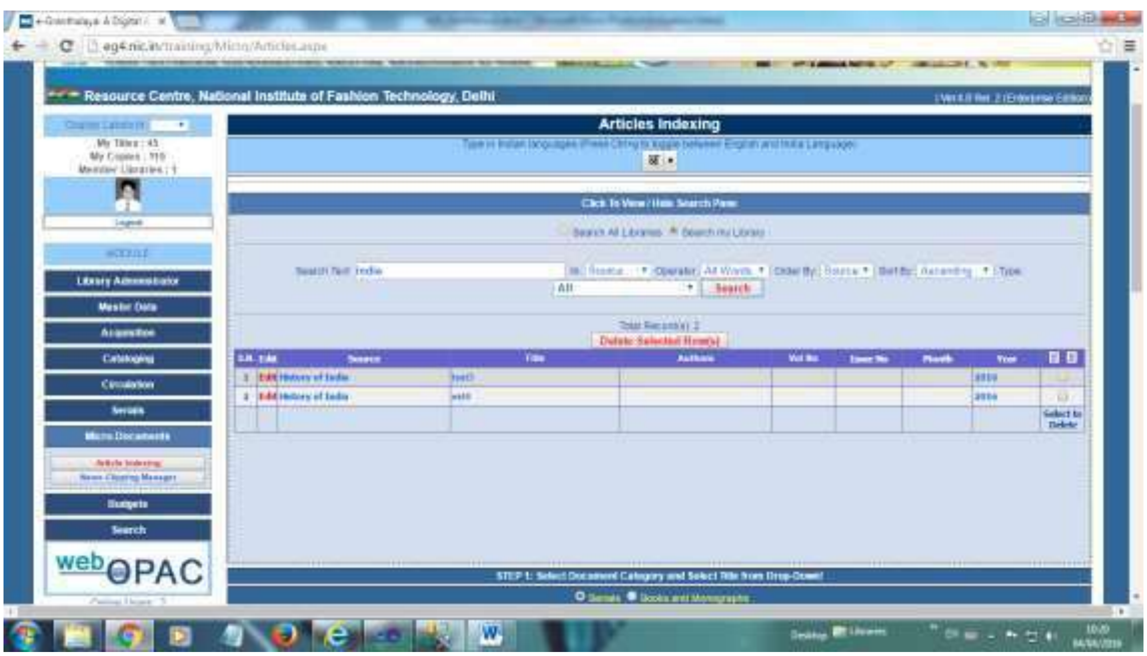
- Chapters from Books and Monographs
- Articles from Journals
- Stories from Magazines
- News Items from Newspapers

11.1. Articles Indexing

This form is used to index Articles from Journals and Magazines and Chapters from Books. This form is loaded by Clicking the “Articles Indexing” button on the left side under Micro-Documents Manager Module –

Search Existing Records

Existing Records can be searched under "Search Pane" where various search parameters are given to filter the existing records. Press SEARCH button to search the records after typing the search string in the text box and selecting various search parameters along with Boolean combination.



Once results appear in the Grid as in above screen then these records may be EDITED/PRINTED/DELETED.

Add New Record

- Load the Web form
- Select Documents Type (Serials or Books) – Step 1
- Select Title from drop-down
- Add details of the micro-document
- Select Type of Micro-Document – Articles/ Special Issues (in case of journals and magazine) / Chapter (in case of books)
- Enter Volume/issue no and other details
- Enter Title / Sub-title and other details
- Browse Files for upload – only PDF files format are allowed

Edit Exiting Record

- Search the Record under 'Search Pane' by using various Search Parameters.
- Once results appear then you may press EDIT button given against each result.
- On pressing EDIT button - Record will be displayed in the Text Box
- Modify the record
- Press UPDATE to save changes

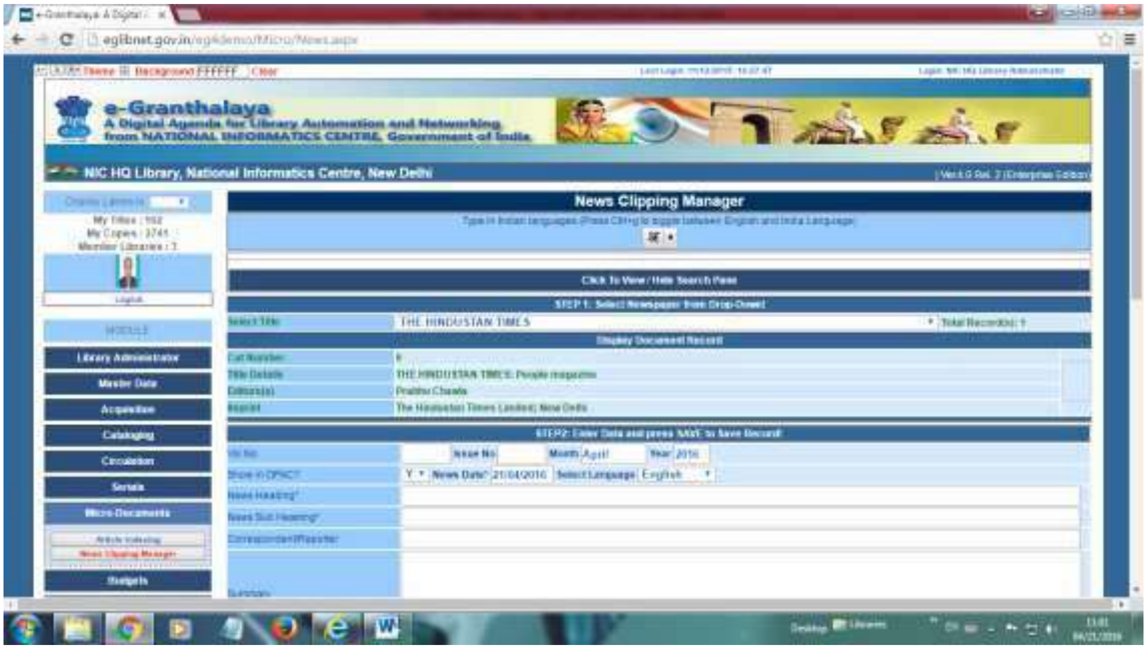
Delete Exiting Record

- Search the Record under 'Search Pane' by using various Search Parameters.
- Once results appear then you may press EDIT button given against each result.
- Select the records you wish to delete by clicking 'select' image in the right of the grid
- Press DELETE SELECT RECORD to delete the record

11.2. News Clipping Manager

This form is used to upload useful News Items published in various Newspapers and Newsletters or any other sources. The full-text file in pdf/html format of the news item may also be uploaded along with news item details and later these News Items may be accessed on OPAC web pages. Recently uploaded news items are scrolled on main OPAC Home page.

Before adding/uploading News Items, Source of the news items must be entered in SERIALS Module (Add New Title) or in Books Cataloging Module (Add New Title). The News Clipping Form can be loaded on clicking the Button "News Clipping Manager" under "Micro-Documents Manager" Module – following form will be loaded:



Search Existing Records

Existing Records can be searched under "Search Pane" where various search parameters are given to filter the existing records. Press SEARCH button to search the records after typing the search string in the text box and selecting various search parameters along with Boolean combination.

Add New Record

- Load the Web form
- Select News Paper from Drop-Down – Step 1. In case, News pater is not available then first add new record of News Paper in SERIALS Module – Add Title
- Type details of the News Item either typing by hand or copy and paste direct from Newspaper Web Site.
- Type Vol No / Issue No if exists. Type Year in yyyy format and Date in dd/MM/yyyy format
- Enter URL of the news item from web
- Save One Photo of News Item and then browse for upload (otional)
- Browse the pdf file of News Item if available
- Press SAVE Button to save the record
- Once Record is saved it is published in Grid at the bottom of the page.

Edit Exiting Record

- Search the Record under 'Search Pane' by using various Search Parameters.
- Once results appear then you may press EDIT button given against each result.
- On pressing EDIT button - Record will be displayed in the Text Box
- Modify the record
- Press UPDATE to save changes

Delete Exiting Record

- Search the Record under 'Search Pane' by using various Search Parameters.
- Once results appear then you may press EDIT button given against each result.
- Select the records you wish to delete by clicking 'select' image in the right of the grid
- Press DELETE SELECT RECORD to delete the record

News Scrolling on OPAC Home Page

Chapter 12
Budgets Module

This module is used to manage Budgets of the Library where Budget details are entered every year and then bills are processed towards purchasing of books and monographs and Subscription of Serials. Later, at the end of Financial Year – Bill Register may be generated with full details of the payments processed in the software.

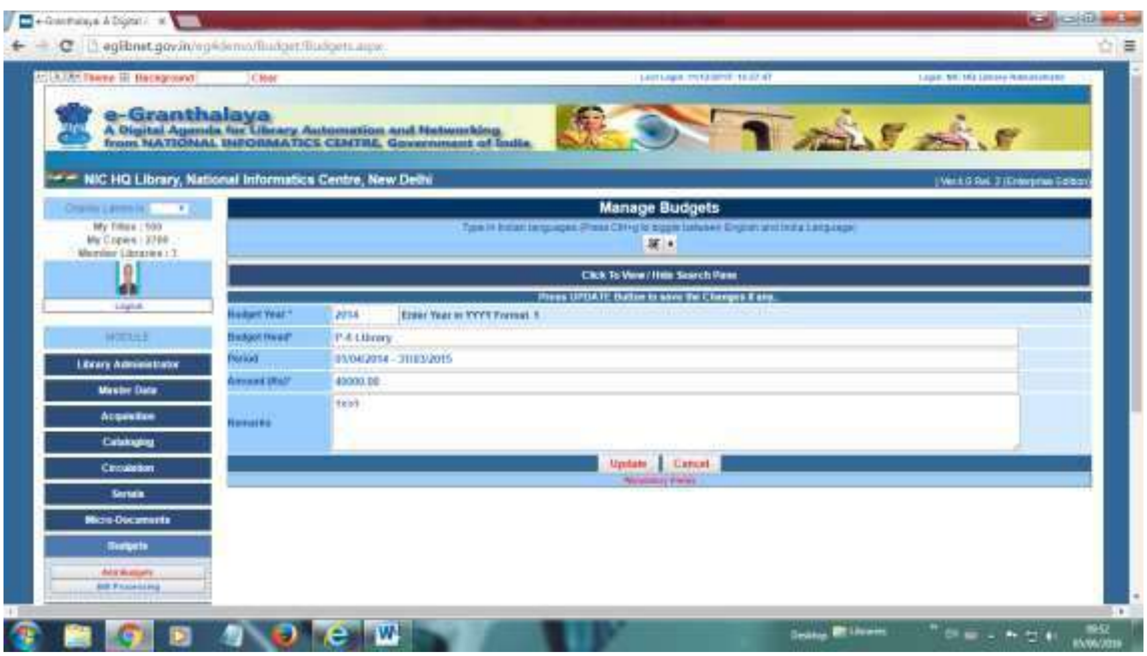
The Module contains Two Forms -

- Add Module Details – To added the details of the Library Budget received every year
- Bill Processing Module – Where bills are processed steps after completing the BOOKS ACQUISITION or SERIALS Module.

12.1. Add Budgets

This form is used to enter details of the Library Budget received every year. There may be more than one Budget Head every year where funds may be received from various sources.

The Form can be loaded by clicking the "Add Budget" button from the left of the application under BUDGET Module –



How To Search Existing Records

Existing Records of Budgets added during last years may be searched under 'Search" Pane given on the top of the form.

- Click the Search Pane
- Search the existing records by using various search parameters
- Press SEARCH Button to view the records
- Once Results appear in Search Grid – you may perform various actions like Deletion / Editing etc.

How to Add New Record

- Type Budget Year in YYYY format , for example 2016 (means 2016/17) – Mandatory field
- Type Budget Head if any (Mandatory Field)
- Type Amount in Rupees received under the Budget Head. Write the data in financial terms e.g. 20000.00
- Optional Fields are – Remarks and Period
- Press SAVE Button to save the data

NOTE: Duplicate Budget Head will not be accepted within the Same Year. You may add different Record for different Budget Head in the Same Budget Year.

How To Edit Record

- Search the Budget Record in Search Pane
- Press EDIT button given against each record
- Modify Budget Details
- Press UPDATE Button to save the changes

How to Delete Budget Record

- Search the existing Budget Records under Search Pane
- Select the record from right side you wish to delete
- Press DELETE Button to delete the records

<u>NOTE</u>: In case a particular Budget Record is used in Bill Processing Form under the same module then Budget Record will not be deleted. First you need to un-process the Bills of the Budget Year then you can delete Budget Record.

12.2. Bills Processing

This Form is used to Process the Bills which belong to BOOKS ACQUISITION Module as well as SERIALS Module. These bills are received from vendors as per the ORDERS Placed for purchasing of Books in BOOKS ACQUISITION Module and Subscription of Serials under SERIALS Module. The bills may be posted under the SAME PAYMENT REQUEST NO in bulk to club the bills of the same vendor.

The Form can be loaded by pressing BILL PROCESSING Button under BUDGET Module. On Load – a blank form will be loaded. There are following 4 Tabs on the form:-

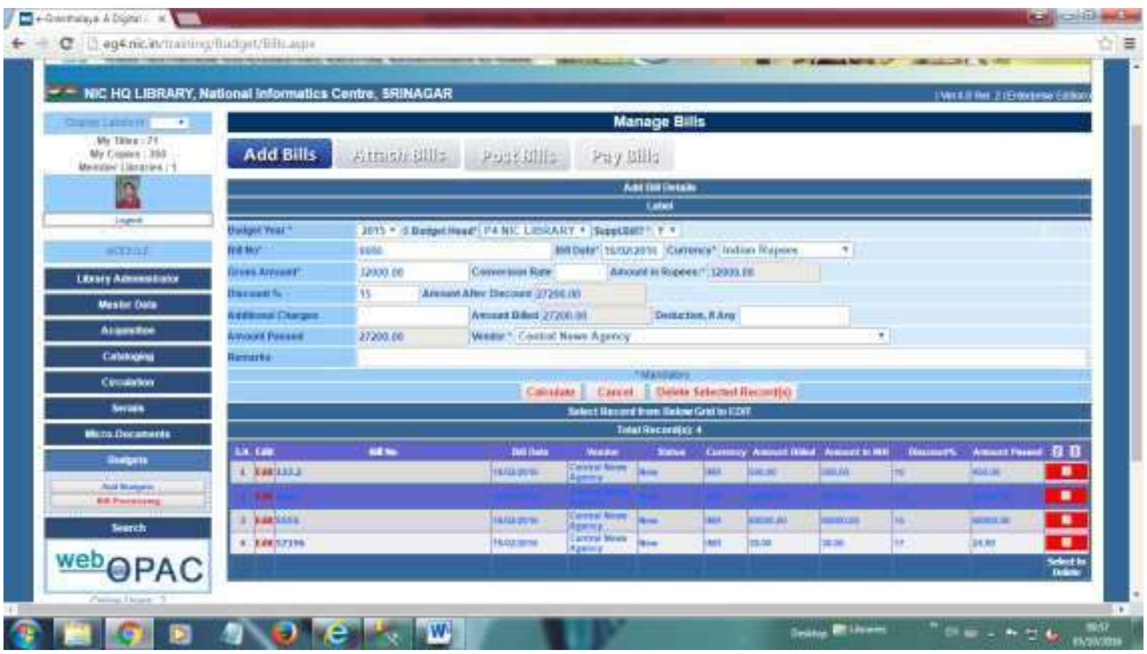
A. Add Bills Details
B. Attach Bills with a specific ORDER Placed under BOOKS ACQUISION Module or SERIALS Module
C. Post Bills – to Account Section for payment
D. Pay Bills – Update and deliver Checks to the Vendor

12.2.1. Add Bills Details

- Select Budget Year from drop-down. If not available then first add Budgets in the previous form
- Select Budget Head under which bill will be processed
- Whether Supplement Bill or Main Bill (Y/N)
- Enter Bill No / Bill Date

- Select Currency from Drop-down (Assuming that the final figure/Total Figure of Bill will be in same currency where individual Items may have cost in original currency with conversion in Indian Rupees also.)
- Enter Gross Amount / Conversion Rate (if currency is other than Rupees)
- Enter Discount Percentage etc.
- Enter Additional Charges, etc (e.g. Handling/Postal Charges)
- Enter Deduction, if any (any amount pending on Vendor)
- Select Vendor from drop-down.
- Press CALCULATE Button
- Press SAVE Button to save the Bill details
- UNIQUE Bill No will be processed / No duplicate Bill from same Vendor will be accepted
- Bill status will be “NEW” on adding new bill.

NOTE: In this way, you can process many bills to be clubbed during Attaching/Posting bills under same Payment Request No.



12.2.2. Edit Bills Details

- Un-Attached/un-posted bills will be available on this form in the Grid at bottom of the form.
- Press EDIT Button from the Left of the Record in the Grid to edit the record
- Do modification in the bill details as desired
- Press CALCULATE Button
- Press UPDATE button to save the changes

NOTE: Once bills are attached/posted in the next steps then such bills will not be visible in the Grid here on this form.

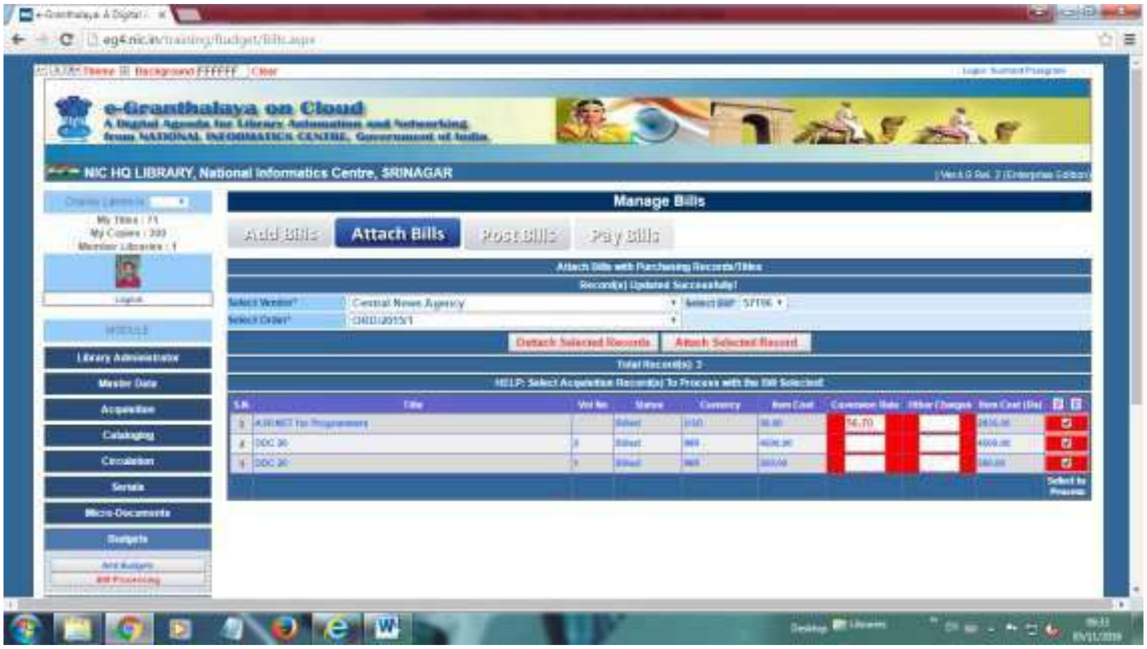
12.2.3. Delete Bills

- Select Bill(s) from the Grid by clicking against record in the right side
- Press "Delete Selected Records" button to delete the bills

NOTE: Un-processed bills which are visible on this form can only be deleted. In case, you wish to delete bills which have been processed then you need to reverse back the process (un-post / un-attach) of bill processing.

12.2.4. Attach Bills

- The Bills Added under ADD BILLS Tab are visible here
- Select the Vendor from drop-down. Vendor name will appear from Bills Added in last step.
- Select Order from drop-down
- Select Bill from drop-Down
- Enter Rates etc. for individual items
- Enter Conversion Rate if cost is in foreign currency
- Select the Items from Grid at the bottom
- Press "Attach Selected Records" button to save the changes



NOTE: Bills processed here may also be Detached by un-selecting the items and pressing "Detach Selected Records" Button.

12.2.5. Post Bills

Here Bills are posted to Account Section in bulk or alone / under a distinct PAYMENT REQUEST ID.

- Enter a unique Payment Request No/Id (Which has not been used/processed earlier)
- Enter Payment Request Date
- Select the Bills form Grid
- Press Post Selected Records

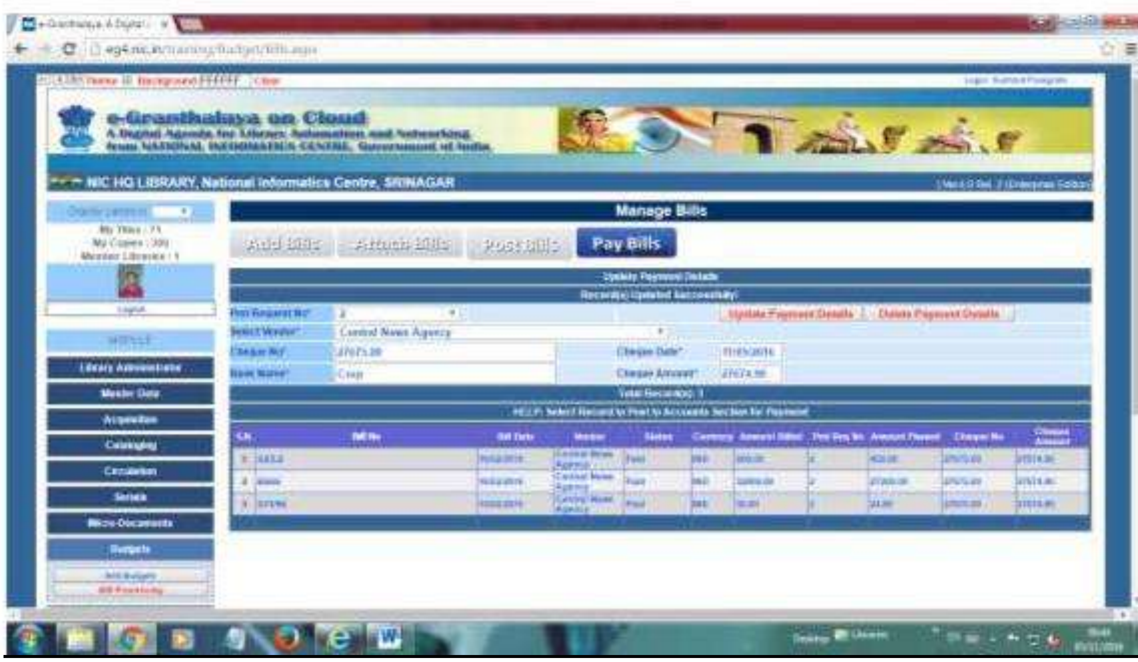
- All bills selected will be clubbed together as per Vendor and amount will be sum-up accordingly.
- On posting these Bills – status will become “Posted”

NOTE: bills may be un-posted by Selecting the Records and pressing “Un-Post” button.

12.2.6. Pay Bills

On this step – the bills which were posted at last steps – cheques are ready – Entry of Cheques are made here

- Enter Cheque Details
- Press Update Payment Details
- In case, you wish to delete Payment Details – then press DELETE PAYMENT DETAILS button.



REVERSE PROCESS

In e-Granthalaya, you can go back – step by step in order to delete the information processed under Budget Module.

- Delete Payment Details from PAY BILLS Tab
- Un-Post Bills from POST BILLS Tab
- Detach Bills form ATTACH BILLS Tab
- DELETE Bills from first Tab (Add Bills)

Chapter 13
Search Module

This Module is used to Search the full database where data entry has been made by library staff. This module will help to find out all the records so entered and to generate various kinds of report required by library staff and administration.

13.1 Accession Register

This form is used to view all the copies entered under your library along with other details. The form provide searching of accession register with various parameters given on the top of the form. Some of the parameters are given below:

Options: You can select Document type from three drop-downs given on the top of the search Pane – Bibliographic Level / Material Type / Document Type. In case you wish the generate search for Dictionary, for example, only then select the document type – dictionary and press SEARCH button.

- All Accession Numbers
- Range of Accession Numbers
- Range of Data of Accession Number
- Class No
- Subject
- Sections
- Location
- Status of copy
- Collection Type
- Acquisition Mode wise search and Report
- Accession Nos start with….
- No. of Records viewed in one page: Default 10 Records

After Selecting any parameter you need to press SEARCH button – result will appear in Grid. Once result appear then following action may be done:-

- Generate various kinds of Reports
- Export Data in desired format

NOTE: There is one option on this page – VIEW NO OF RECORDS (10,100,1000 ….) so that you can make choice of getting desired number of records at a time. While migrating or taking report you need to goto next page and get report/export further.

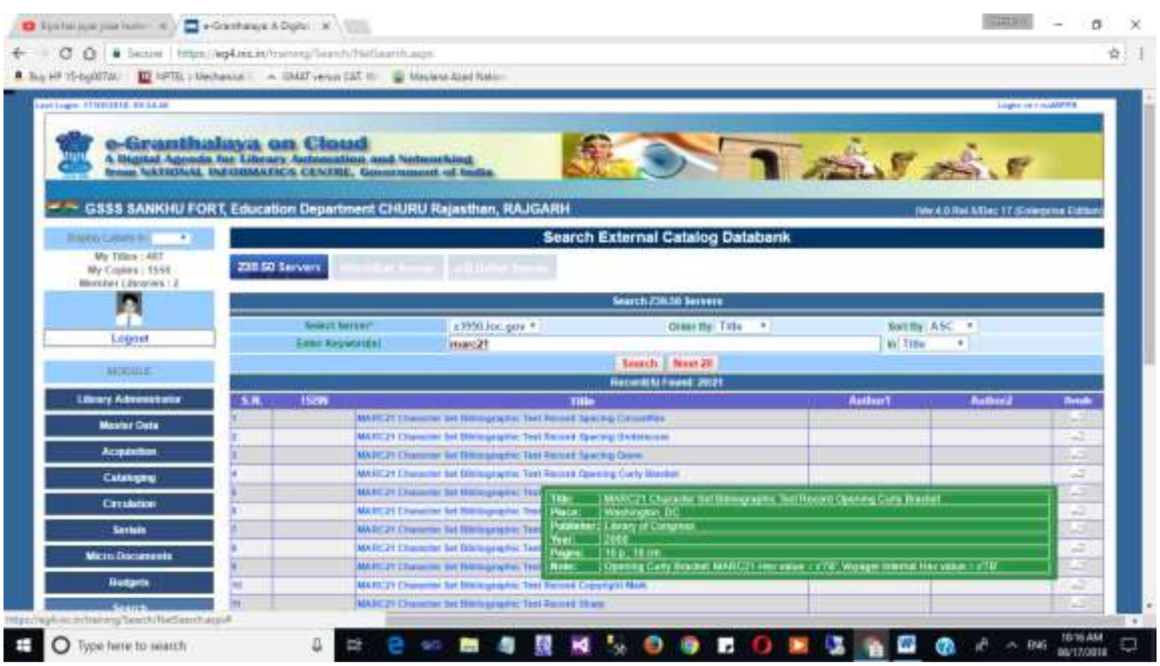
Data results appeared in Grid can also be exported in EXCEL Format by pressing the excel icon button given on the top of the Grid

Type of Reports

- Compact Report – One Record in one Line
- Summary Report – AACR2 Report
- Detail Report – Report with all fields entered.
- Holding Report – Title details along with Copies of the Title
- Inspection Report
- Accession Register
- Compact Accession Register
- Library Asset Report- With Total cost of all the copies
- Library Register with Cost of every book (If entered during data entry)

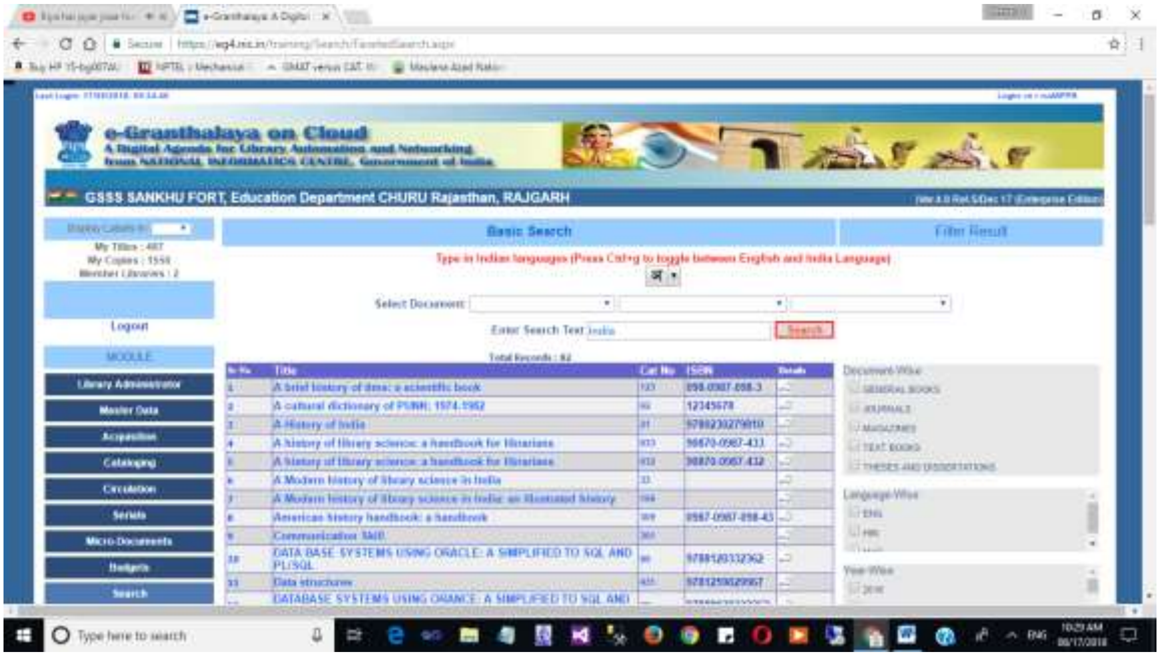
13.2 Search from Internet Resources / Search External Catalog Databanks

- This form is used to Search the catalog from Other Internet Resources such as Z39.50 Server / WorldCat from Library of Congress, USA and from Union Catalog of Government Libraries hosted at NIC Server
- Search can also be made from Union Catalog of Government Libraries hosted in NIC Server



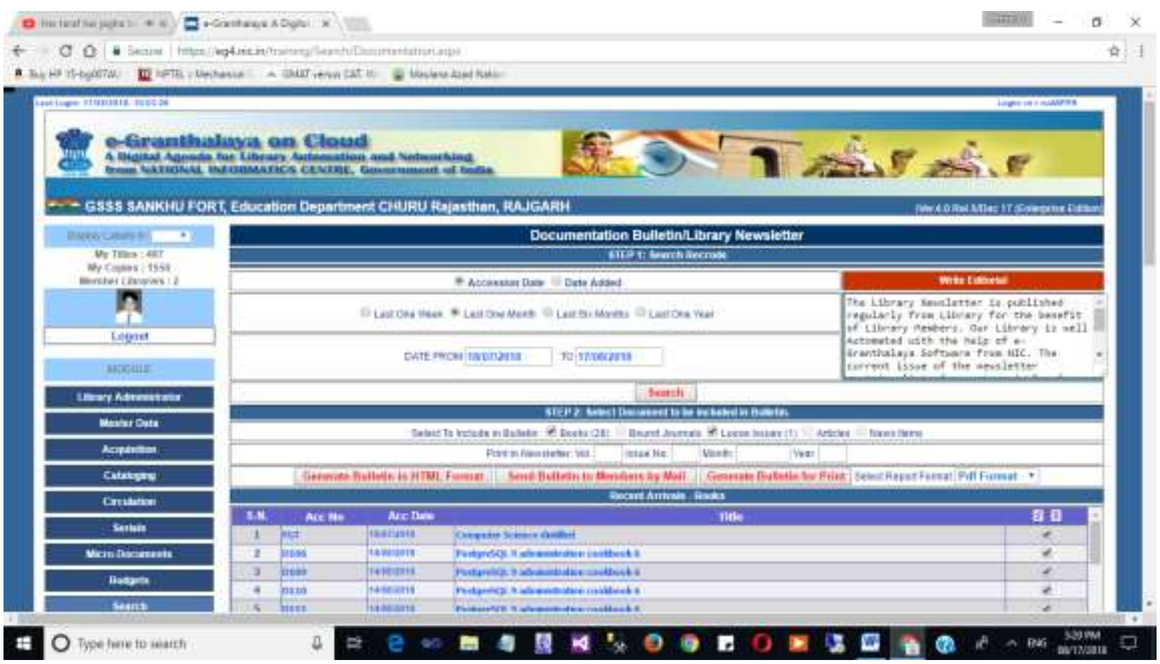
13.3. Faceted Search

This form can be used by library staff to search the exiting collection of their library based on various parameters. A single text box is provided to type the keywords or search string. Once results appear the these can be further filtered based on various parameters displayed.



13.4. Documentation Bulletin and Recent Arrivals

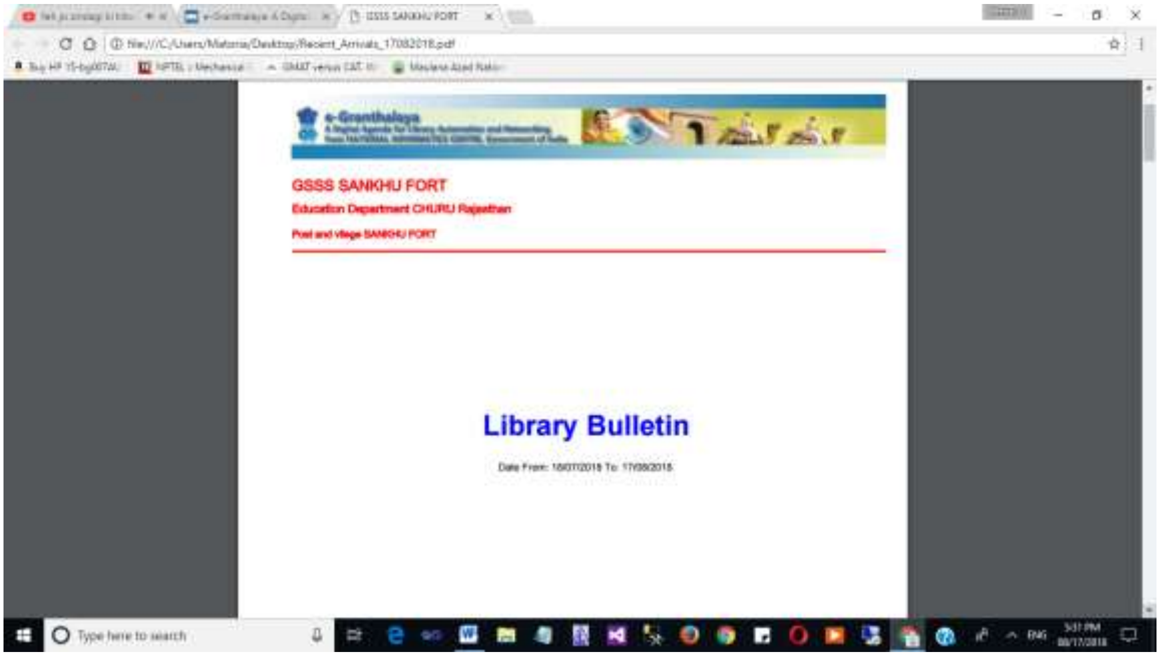
This Form is used to generate the Recent Arrivals list in a Library and preparation of DOCUMENTATION BULLETIN and to circulate it among the library members. The form is loaded after click the “Documentation Bulletin” Button in the SEARCH Module.

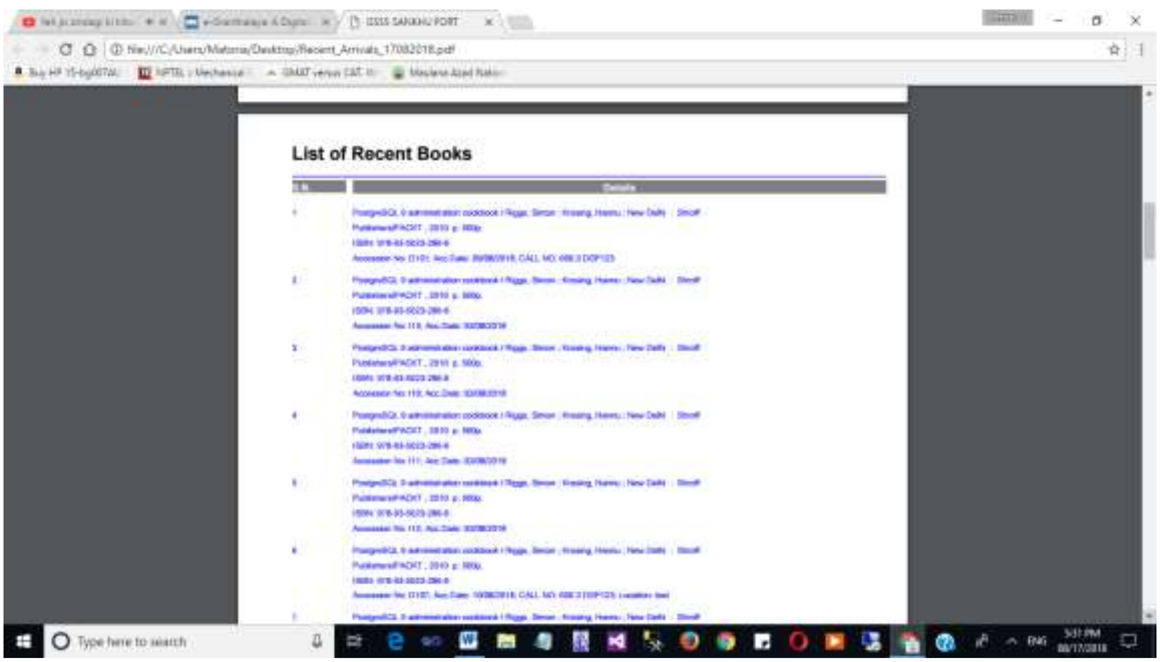


How to generate Documentation Bulletin?

- Select the duration Option given on the top of the Form. Duration means the books purchased during a specific period –
  - Last One Week
  - Last One Month

    - Last Six Months
    - Last One Year
- Press Search Button
- List of documents added in library during the selected period will appear in the Grid
- As options – you can select /de-select the type of documents to be included in Documentation Bulletin
- Optionally, you can write the small paragraph of Editorial Text – to be included in the bulletin
- Also – you can add Vol.No, Issue No and Month / Year of the Bulletin
- Press the Appropriate Button to generate the output of the following kinds:-
    - Documentation Bulleting in HTML Format
    - Send Bulletin in Members Mail (HTML Format) – automatically send the bulleting in those members mail who have opted to receive the bulletin given in their profile.
    - Generate the Bulleting in PDF or DOC Format for print or for other purpose.





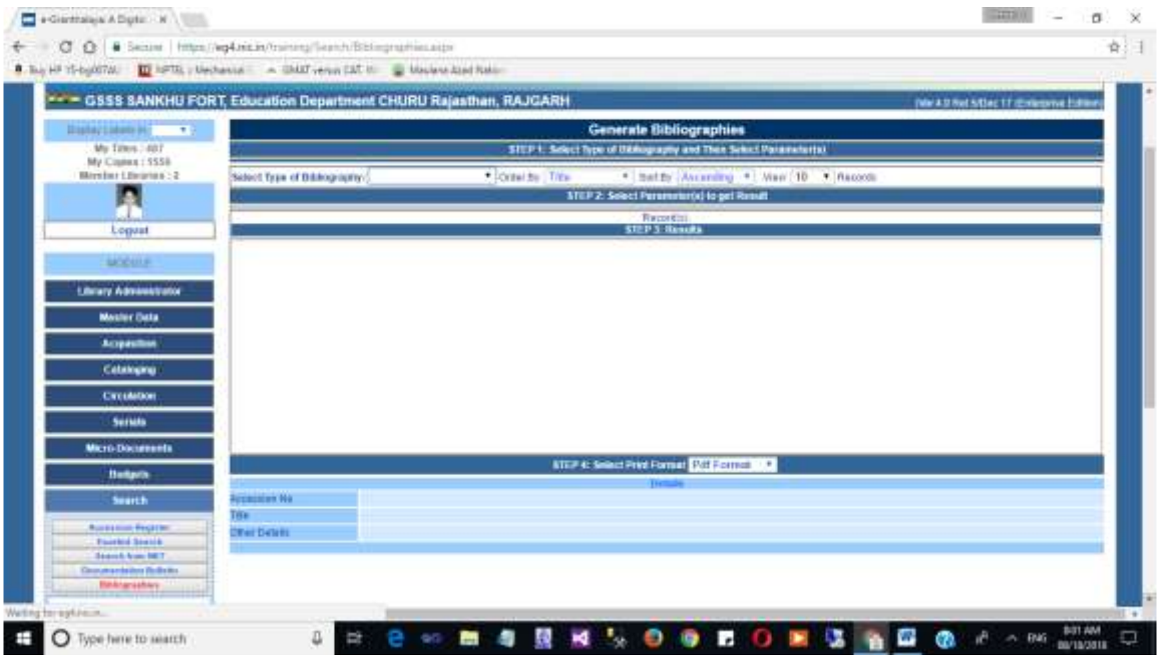
13.5. Generate Bibliograhies

This Form is used to generate various types of Bibliographies, as given below:

1. Author Bibliography
2. Subject Bibliography
3. Vendor Bibliography
4. Language Bibliography
5. Year Bibliography
6. Document Types

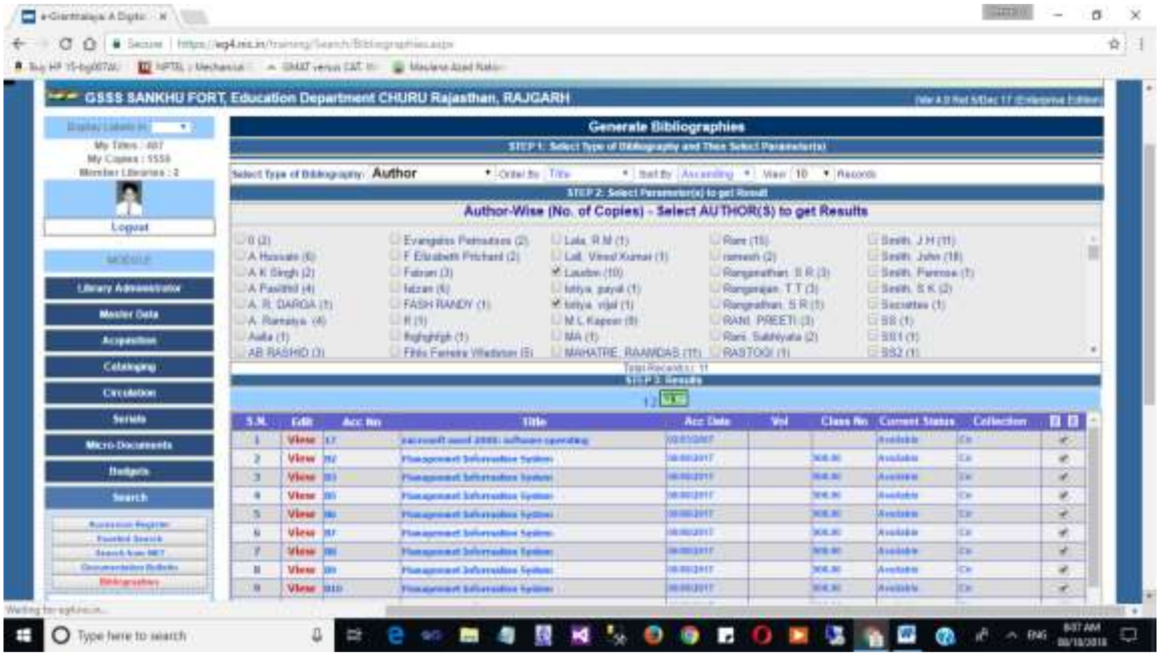
7. Class No Bibliography

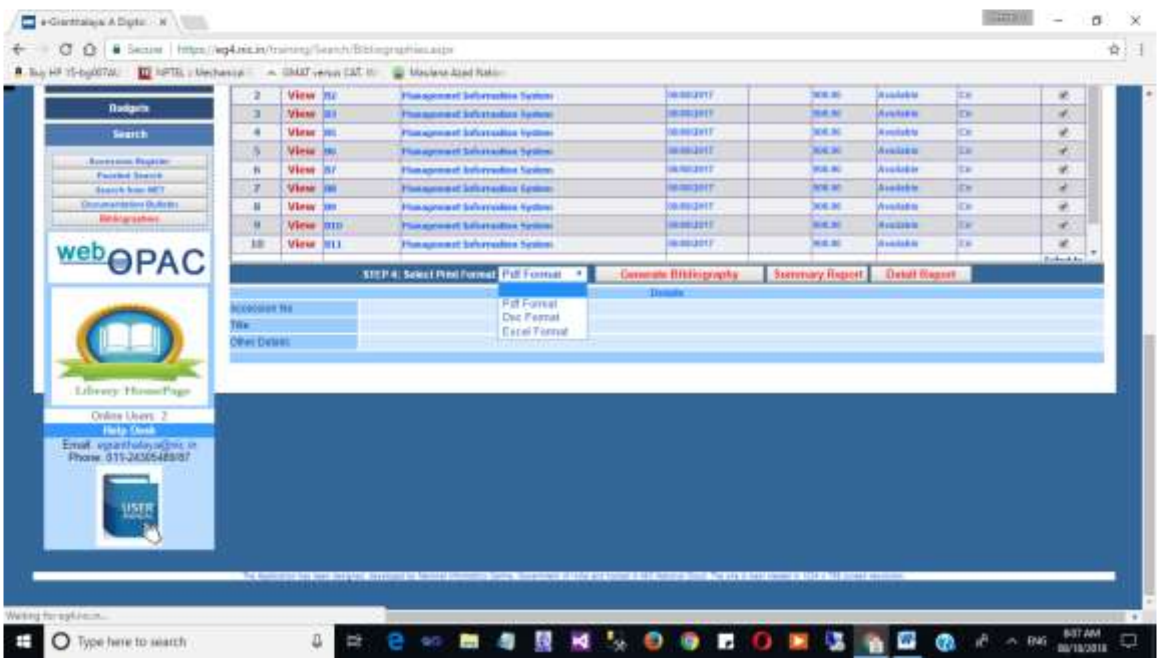
Bibliography contains the list of Books available in library on a selected parameters. Options are also given either to generate full bibliography or on selected value/member of parameters selected.



How to generate bibliography?

- Load the Bibliography Form under SEARCH Module
- Select Type of Bibliography from drop-down based on you wish to generate bibliography
- Once you select the Type of bibliography – complete list of library collection will be displayed in result Grid and all the values/members of selected type of bibliography will be displayed as check boxes
- Select one or more values and click these – results will be filtered based on selection.
- Generate Print in DOC or PDF Format






GSSS SANKHU FORT
Authors Bibliography of Books
Group By: Author-Wise List of Books
Summary of the Report
S.N.
Author Name
No of Copies
Title Details
Call No
Location