Mandarin Oasis™

Users guide ver 2.9.4
2014

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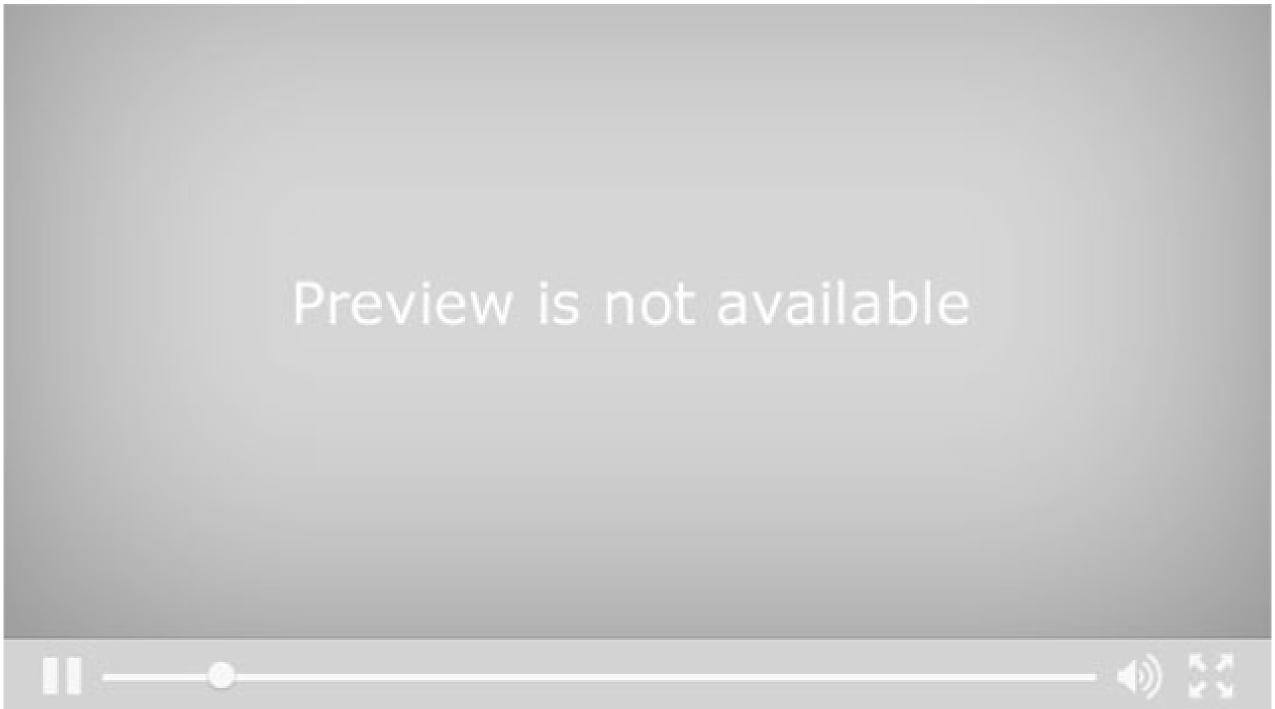
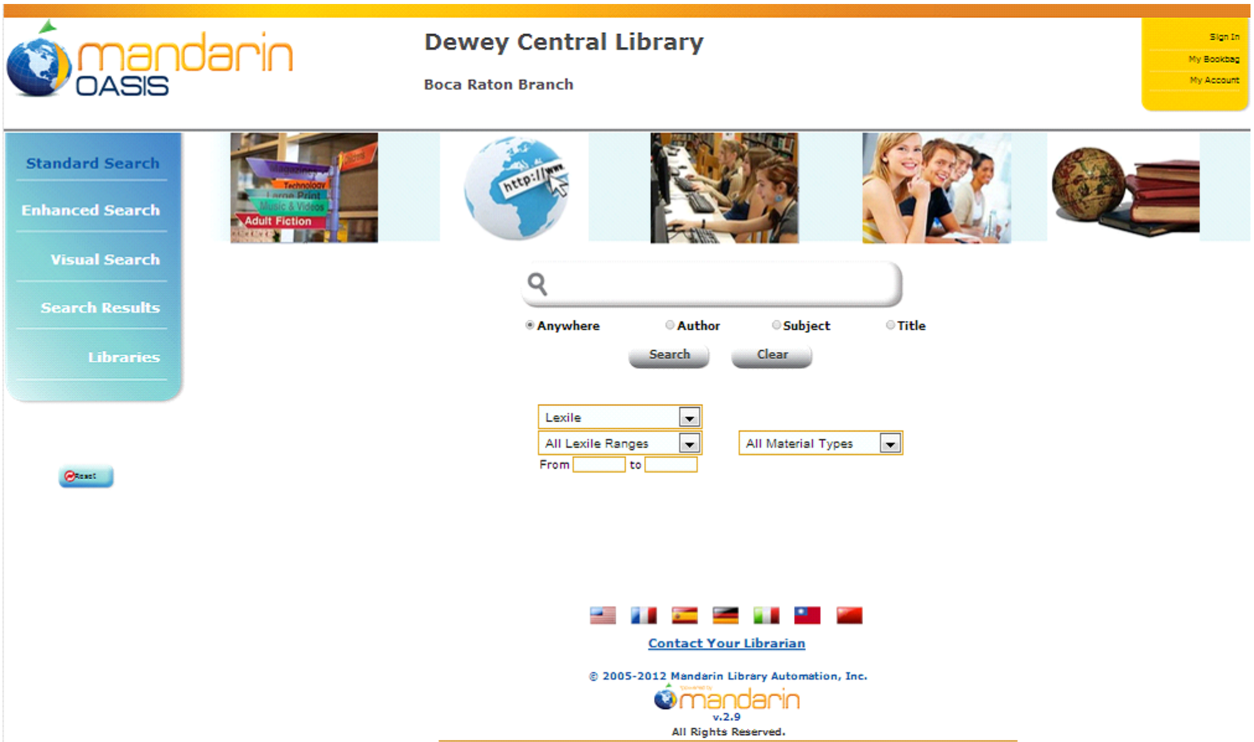
Mandarin Oasis

Mandarin Oasis is a Web-based library management system that allows users to access library resources through any workstation with a Web browser, anywhere at anytime.



It brings to the accessibility of the web the flexibility and maturity of Mandarin’s long history of providing quality, affordable integrated library systems.

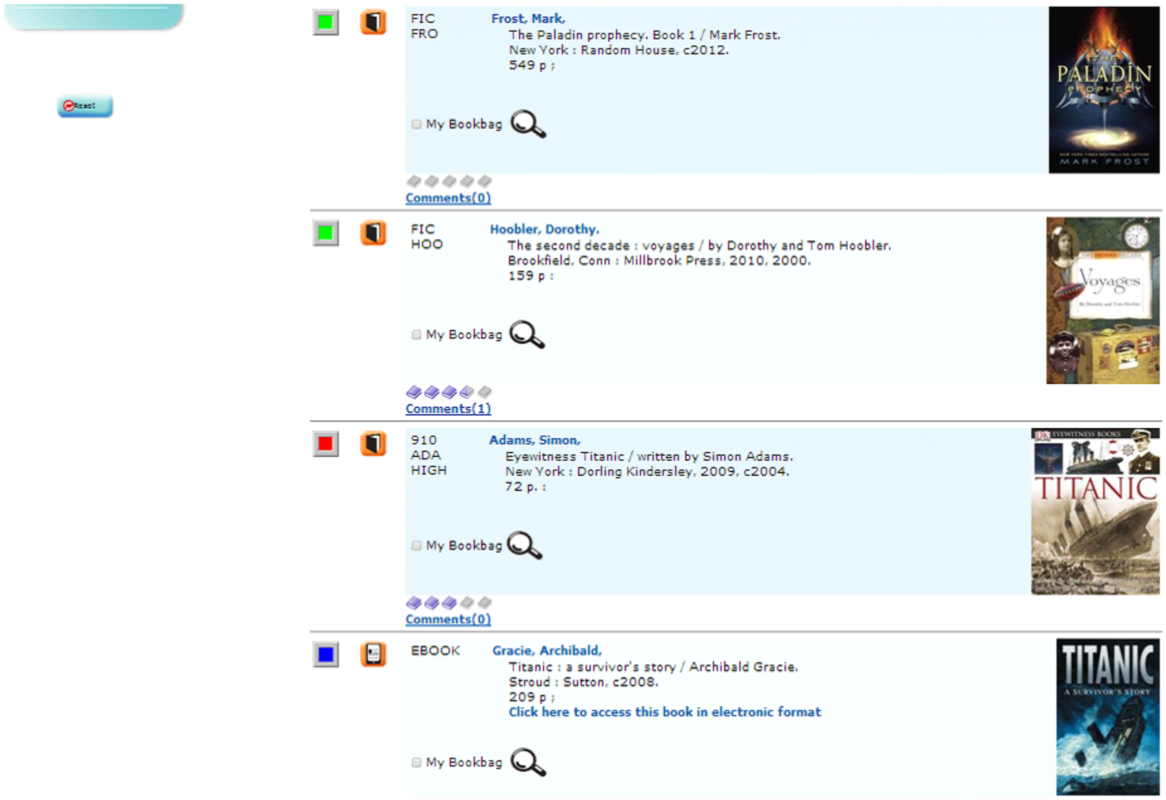
The patron interface of Oasis is wonderfully flexible and customizable. The librarian who knows her patrons and their needs can easily configure the public catalog portion of the program to best answer those needs and attract users.



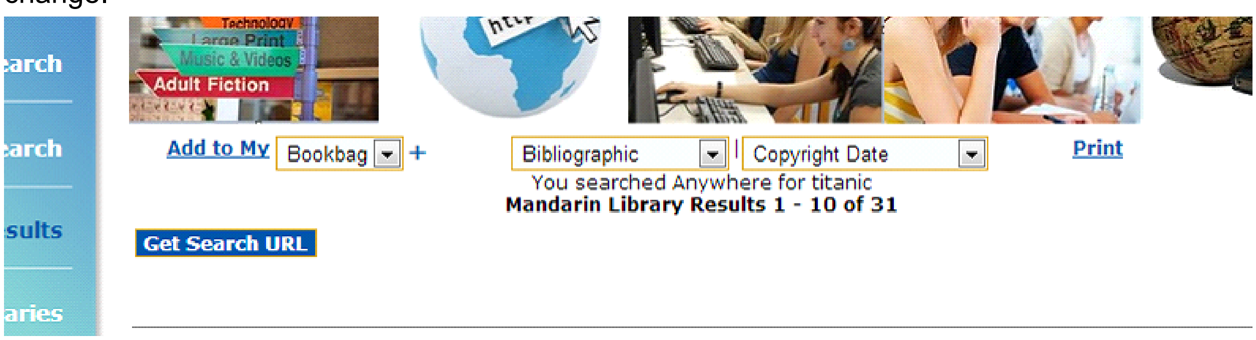
Put your library's logo or image along with your library's name at the top of your OPAC. The images along the top of the search window can be customized with pictures from your library or other graphics you choose. These images are also links that can lead your patrons to outside resources like your subscription databases or to the catalogs of other libraries, or they can link back to your institution's or community's websites and online resources.

You can decide which language interfaces are available, as represented by the flags at the bottom of the screen. You can have the Contact Your Librarian link or not, you can use the Lexile search filter or turn it off, and you can customize the list of material types, including expanding the concept of this filter to other subsets or special collections in your library.

There are three methods of searching in the Oasis OPAC, as you see on right. You can decide which search is the default. Here you see the Standard Search with a google-like search box. Entering a word or phrase here and clicking the Search button brings you to the first Results screen.

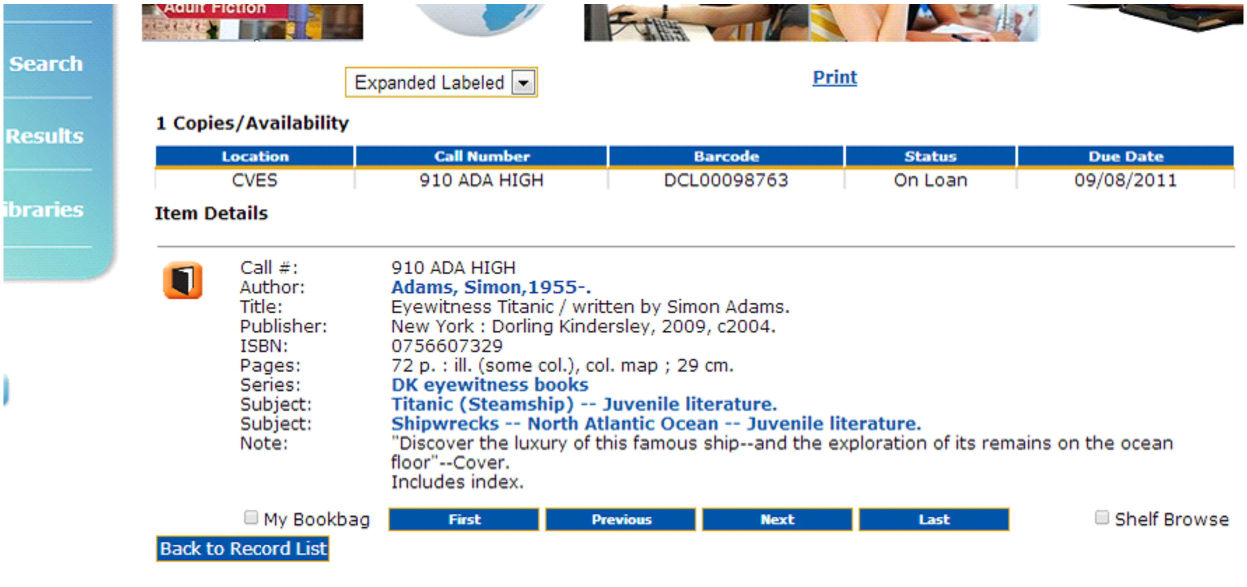


This page shows basic information about each item, including call number, and an icon that indicates the type of media. The Availability Box shows whether the item is on the shelf or unavailable – probably on loan – or is an electronic item, perhaps an ebook or a website. The cover images come from an add-on subscription to Syndetics Solutions, which provides much more information about the item, including summaries and reviews. Patrons can use the Bookbag feature to collect a list of items which can be printed or saved as a bibliography. In all these cases the format and the order of the list are easy to select and change.

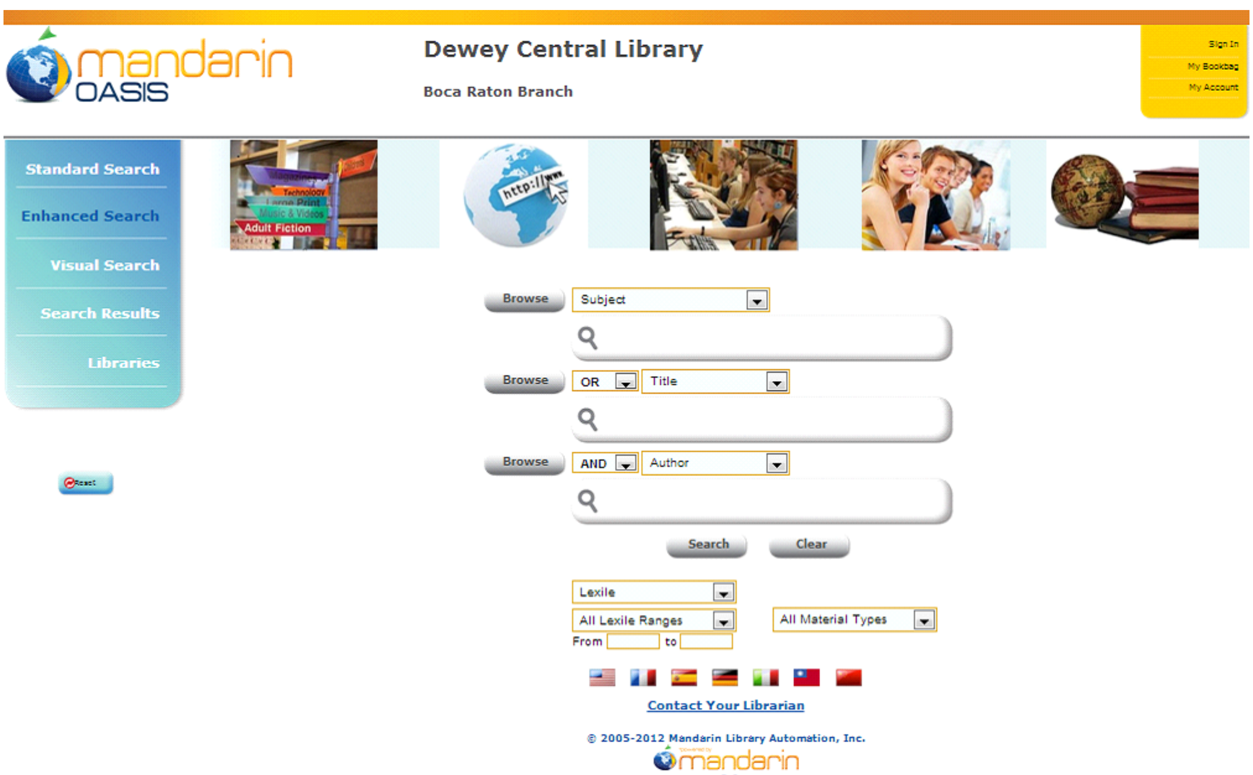


Your patrons can rate the items in the OPAC on a scale of 1 to 5, and they can add comments or reviews, that are visible after a librarian has checked them.

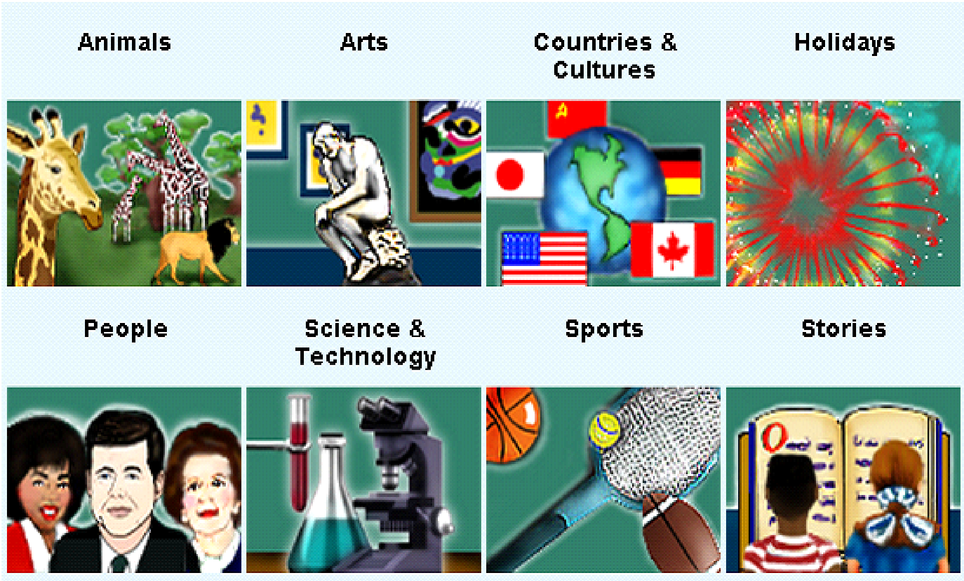
Clicking on the Details button brings up more information on an individual item, including its exact status. Blue highlighting, of course, indicates hyperlinks to allow the patron to follow subjects or authors.



Another way of searching is the Enhanced Search, which has dropdown menus offering several more fields in which to search. Terms can be combined with Boolean operators, and Browse buttons give access to the list of subjects, titles and authors in the indexes. Patrons can create very specific search queries to fulfill their research needs.



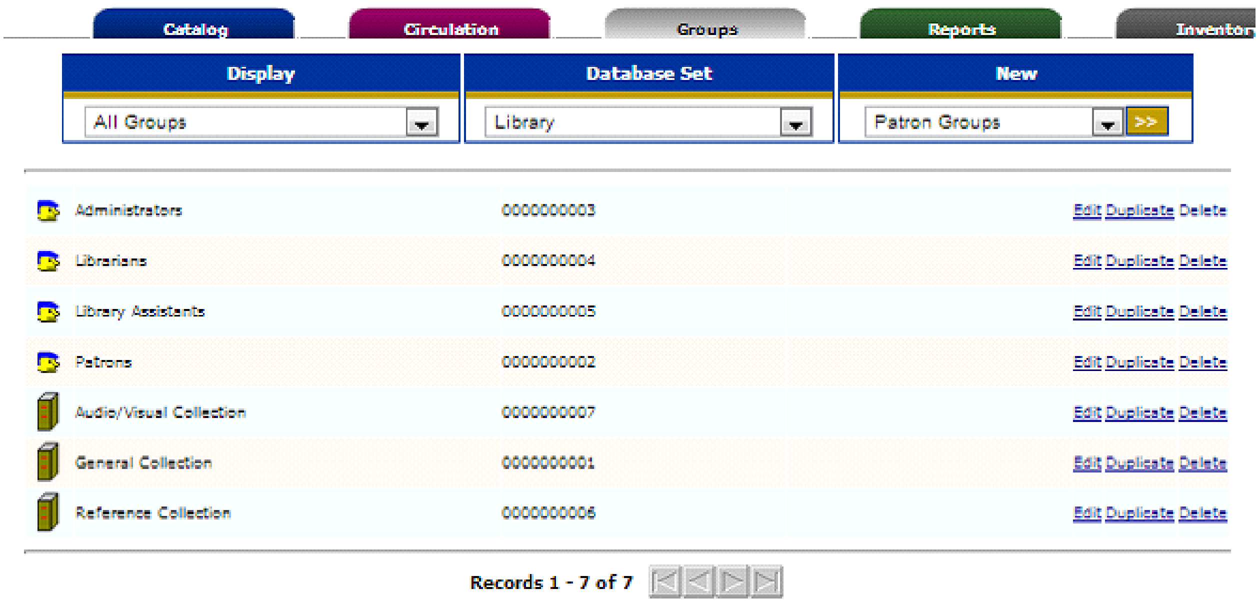
The third search option is the Visual Search, which comes with eight pre-configured queries and hierarchies, but which can also be customized to fit your library. Using graphics from any number of sources,



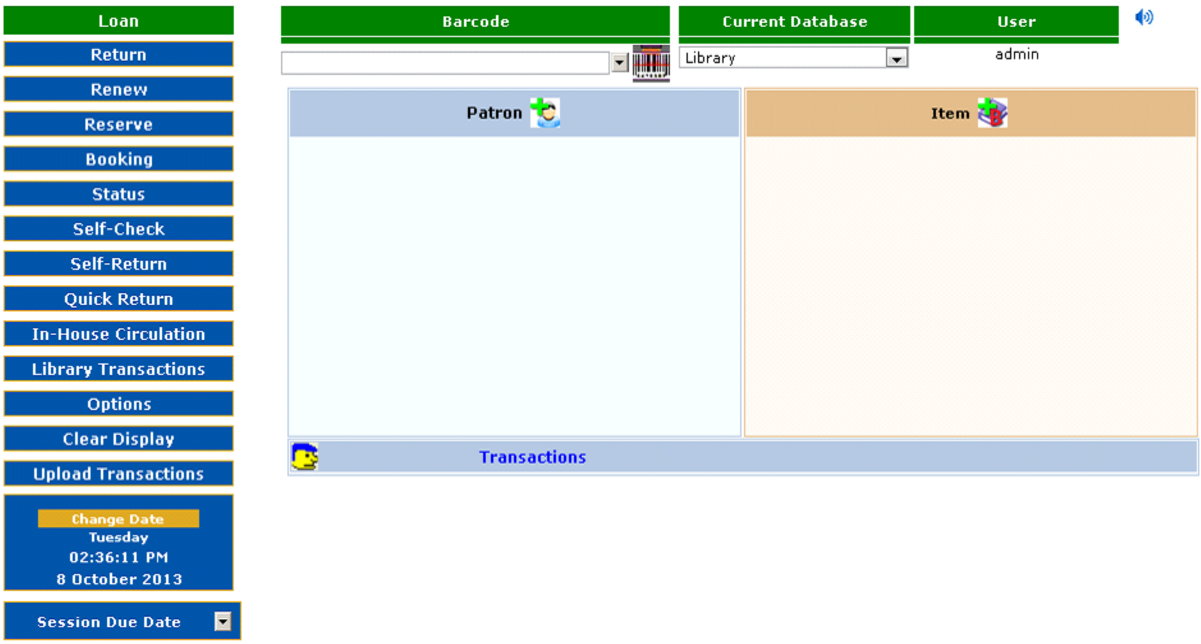
you can customize the hierarchies and queries and even create links to lead your patrons easily to the resources you know they want to find. Like the pictures at the top of the page, buttons can be created to link to other databases or to other online sources of information. They can also be set to do the searches for the kinds of materials your patrons often look for, or to support classroom projects or library events.

Your patrons can log into the OPAC to perform any number of tasks for themselves, freeing you for other important library work. Besides being able to view their own transactions, current and historical, they can reserve items themselves, renew their own borrowed items, and even check out and check in their own materials. They can create Bookbags – lists of items they want to keep track of – and Bibliographies that can be printed, saved, or shared. All of these features are, of course, subject to library policies and librarian choice, and they can be configured specifically for sets of patrons and items.

The program can allow for many multiple levels of access for patrons and library staff. At the highest level, the librarian has access to the entire suite of program parts and features. Access levels as well as circulation rights are set in Groups, which can be as simple or as complex a matrix of settings as are needed.



Cataloging expands the searching function of the OPAC to include the ability to add item and patron records from scratch, with basic and advanced editing screens, as well as to capture records from other libraries with the built-in Z39.50 feature called Record Fetch. Batch searching and downloading of records from other libraries can be done as well, and item and patron records can be imported from various formats of electronic files. Advanced editing of multiple records is possible with the Find and Replace feature.



The Circulation portion of the program provides the many functions necessary for easily keeping track of patrons and transactions, including loan, return, renew, reserve, as well as the ability to get a quick overview of the status of an individual item, patron, or group. Communication with patrons by email or phone text can be done with a click or automatically.

Reports, referring to anything that might be printed from the program, including cards and labels of various kinds, are created by Oasis as PDF files, so they are easily shared, stored or printed. Dozens of report templates are included, and customizing can be done here as well.

With the Inventory feature Oasis offers a method for checking sections of the collection or the whole, to determine what items might be mislabeled, misfiled, or missing. Printed reports from Inventory can show the cost and scope of lost materials.

Using input from library customers, Mandarin Library Automation continues to develop its programs to meet the needs of 21st-century librarians and library users. Mandarin Oasis offers your library a robust, flexible library system for your library and your patrons into the future.

Introduction

Mandarin Oasis allows access to library resources through any computer with an Internet connection. The simple interface is easy to learn, and the appearance and features can be tailored for each library.

Optional modules and services offered by Mandarin allow libraries to customize their systems to meet their individual needs.

Oasis also supports Unicode, which allows librarians and users to catalog and search their collections in any language.

For single sites or large library systems, Oasis can help lower costs and save time with one-point installation, maintenance and updates. **For customers already using Mandarin M3, Oasis is a seamless upgrade.**

Oasis Setup Steps

These steps are guidelines for installing and configuring your Mandarin Oasis system.

If you were a Mandarin M3 customer before installing Mandarin Oasis, all of your groups, records, and settings will automatically be transferred into Mandarin Oasis. You will only need to perform steps 1 and 2 below.

If you were not a Mandarin M3 customer, you will need to perform steps 1 through 5 before you use Mandarin Oasis.

1. Install the M3 Server and Oasis as explained in the Installation.
2. Configure Mandarin Oasis for your library, customizing the display and features as explained in the Configuration chapter.
3. Set up the groups that Circulation and Catalog require to function. Each group has a customized set of parameters and permissions. This is explained in the Groups chapter.
4. Import records. The import utility is accessed through the Cataloging Tools.
5. Configure your Circulation schedule as explained in the Circulation chapter.

The Oasis Interface

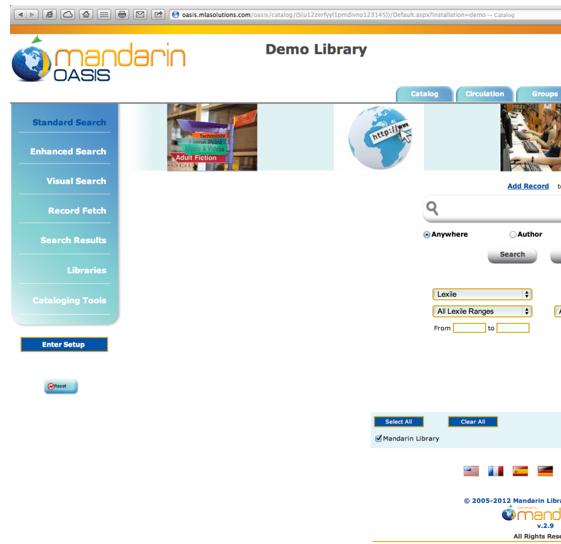
To display Mandarin Oasis correctly, set your monitor's resolution to 1024x768 or higher. If you need instructions, refer to your Windows documentation.

The Mandarin Oasis interface has two modes: Patron Mode and Librarian Mode.

Patron Mode only allows the viewing and searching of records in the Catalog. Librarian Mode allows access to library functions such as Cataloging, Circulation, Group Editor, Inventory, and Reports. The level of access for each of these functions is granted in Group Editor.

Patron Mode

Librarian Mo



Patron Mode

If a patron signs in to Mandarin Oasis, or if no one signs in, the interface displays in Patron Mode with only the Catalog visible. In this mode, no data can be modified.

1 My Account

Click to ***Sign In*** in to Oasis

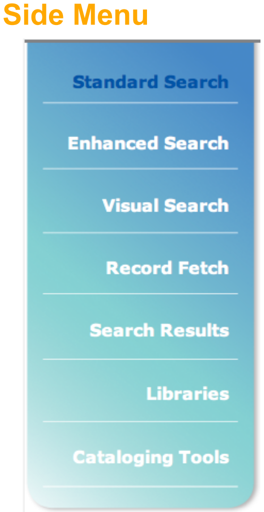
Librarian Mode

When someone signs in to Mandarin Oasis with librarian or administrator rights, Oasis displays the tabs and side menu options for all library functions that person has permission to access.

1 Tabs

For all library functions

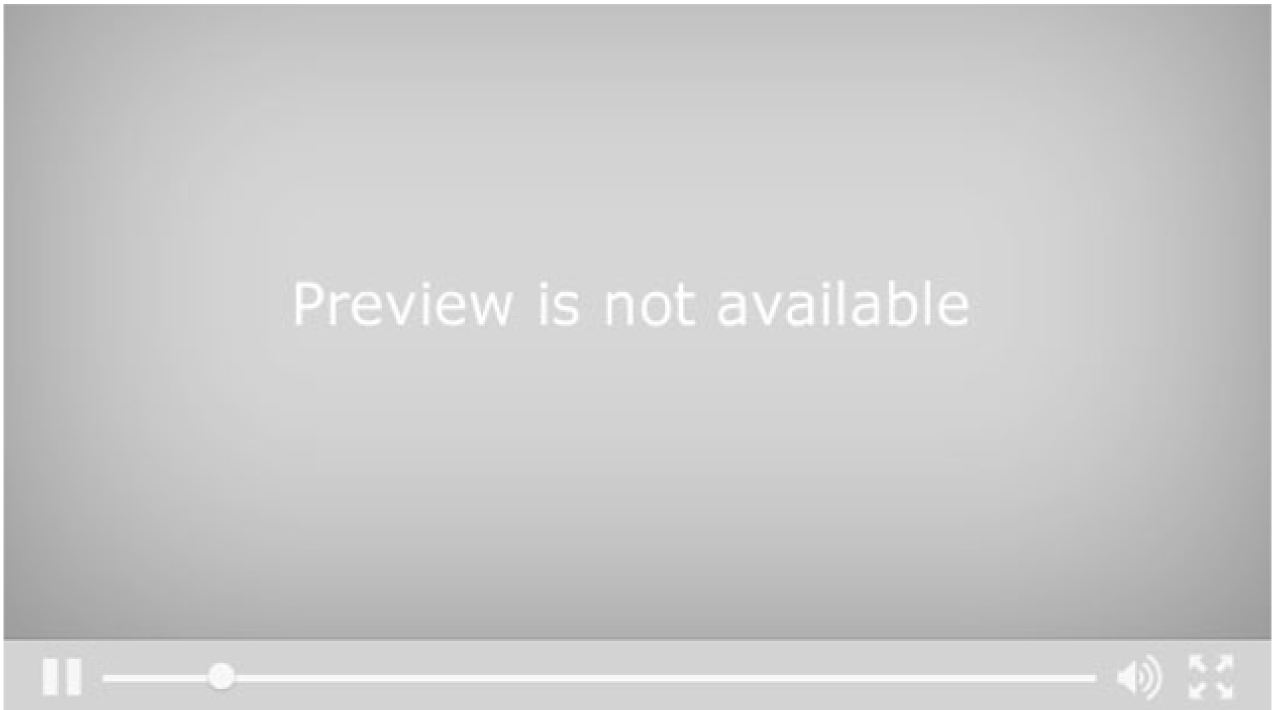
2 Side Menu



For all library functions

Configuration

Setup Page / Installation



Setting up your Oasis setup

Your Oasis setup page is where you can do much of the customization that makes your Oasis installation work best for your library.

To get to your setup page, log into Oasis as an administrator. You will see a button for Enter Setup on the lower left.
Clicking this brings you to a login page for Setup. Log in with your login and password. The default is admin/ boca raton. This is a separate login and password from your Oasis or M3 logins.

After logging in, you'll be at the Server Configuration section of Setup. Here you see the IP address and port number of your database, plus any special keys that indicate a location within a union catalog, if appropriate.

When you leave Setup

If you have made any changes in Setup, you need to open a new session of Oasis to be able to see the changes.

Click on the Setup button at the top of the left menu. This brings you to a page that shows the installations created for your library. There might be several installations, or you might just see the Default.

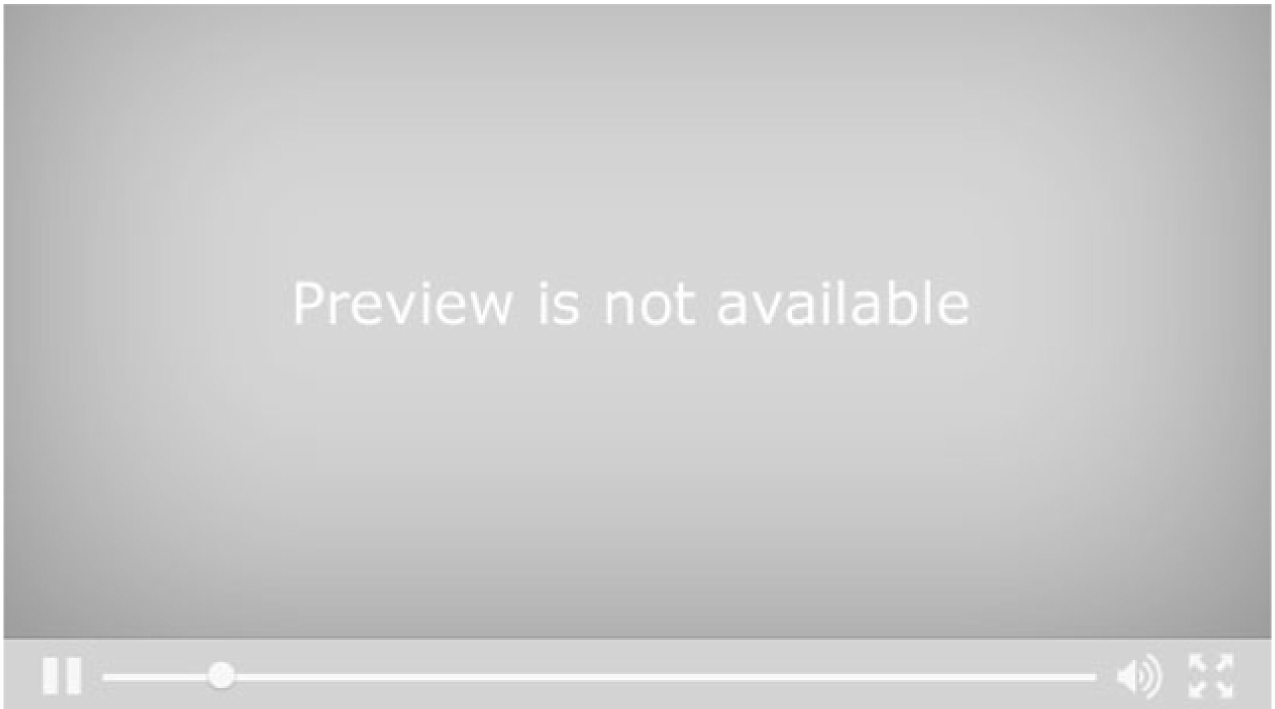
You can create other installations, which can different ways of accessing the program and your data. One example for using separate installations would be if you have a children's section and an adult section in your library. You might want the pictures and the links on the OPAC for the children's section to be different from the OPAC for the adult section. Or you might find that it is useful to have different installations for searching your collection and links from within the library and from outside the library or from home.

Notice that there is a link that shows you what that actual URL is. You can use that to copy the actual URL to a note or an email, or for creating the link from the school or community website.

To be able see and modify the settings for any installation from this page, you must click on the Edit button in line with the installation name. Clicking on it brings you to the server configuration page and makes the rest of the buttons live.

Clicking on the name of the installation opens a new session in a new window at that URL.

Library Settings



To make changes to your library settings on your Oasis setup page, first log in to your Setup.

Click on the button for Library Settings. This is where you can change the logo and the information in the heading for your OPAC.

To change the logo, navigate to the image you would like to use by clicking Browse. Find the image and click Open. Click Upload to bring the image into the correct place in your installation.

Type the title you want to display in the Oasis header, such as your library name.

Type a subtitle to appear in slightly smaller lettering under the title, if desired.

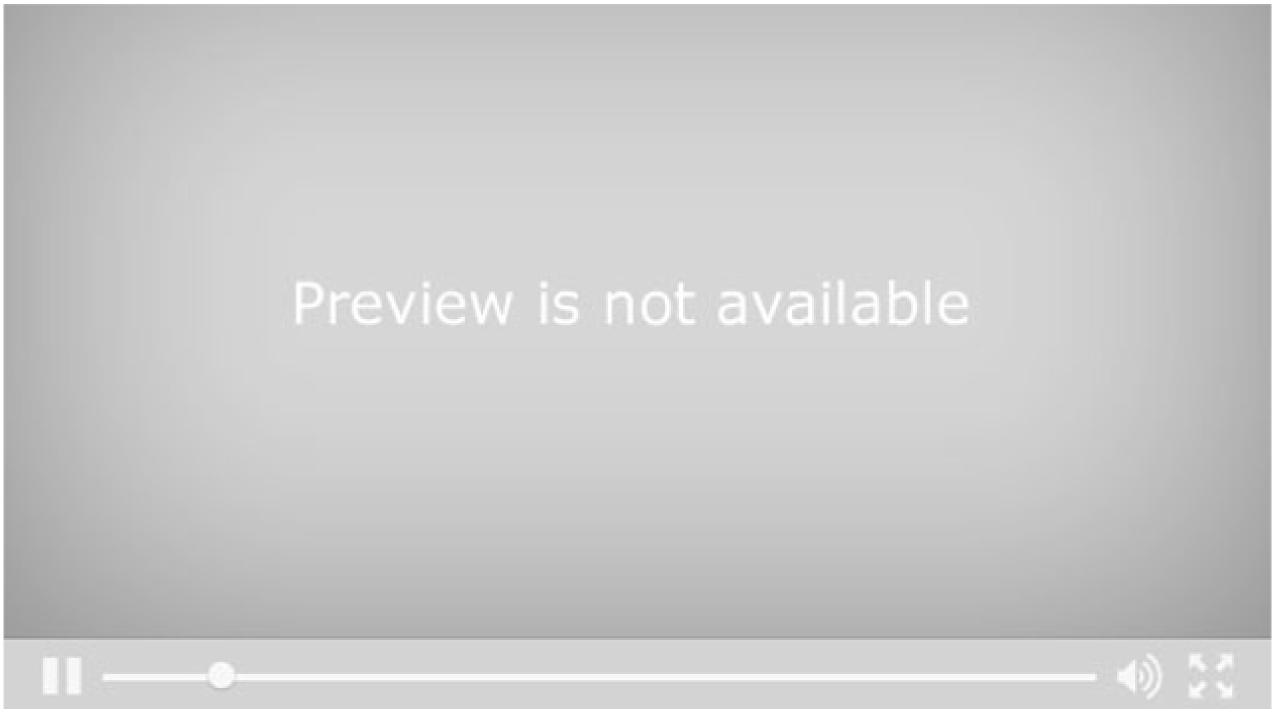
For librarian mailto, type the email address that will receive email when a patron sends a message through the "contact your librarian" link. If this option is left blank, the link will not be available.

For the library mailto, type the email address that will appear in the from field in notification emails sent by the library through Circulation functions.

For the library no reply-to, type the email address that will show as the sending address on emails sent through the catalog.

Click Save to save and apply any changes you have made in the Library Settings section of Setup.

Options



To make changes to your Options on your Oasis setup page, first log in to your Setup.

Click on the button for Options. Here you will find a list of settings having to do with functionality, languages, and displays that can be configured by you. The default settings can be used without changes, but you may find ways you want to customize the program for your library.

- **default_search**: This drop down menu lets you choose which type of search will be the default.
- **login_timeout_minutes**
- **max_holdings_display:** Choose the maximum number of holding records that will display for an individual item in Details mode.
- **page_timeout_seconds:** Select the number of seconds Oasis can remain idle before it automatically resets.
- **page_timeout_cancel_seconds:** Select the number of seconds that a timeout warning will display, allowing the patron to extend the session before Oasis automatically resets.
- **results_per_page**: Choose the number of items to display per page in a list of results.
- **change_results_per_page:**
- **enable_amazon_links**: Amazon links allow the patron to connect to Amazon.com to view editorial and customer reviews, related items, copies available for purchase, and more. Click ON to enable these links.
- **amazon_associate_id:** Having an Amazon Associate ID allows you to earn commission on items purchased by patrons who connect to the Amazon Website via your Amazon links. If you enabled Amazon links and have an ID, type it here.
- **covers_source**: If you want to display cover images, leave the setting at **local (legacy)** to use images in your local picture table, or **syndetics** if you have a subscription to Syndetic Solutions, or **local** to see pictures and basic information from Google Books.

details_enrichment: If this setting is on, on the Details page you see basic information from Google Books, or, if you have a subscription to Syndetic Solutions, Syndetics will display detailed content data about your items.

- **details_call_subfields**: Choose which subfields of the call number will appear in the Details holding display.
- **enable_standard_search:**
- **enable_enhanced_search:**
- **enable_visual_search:** Click off to disable any of the search types.
- **standard_search_default_attribute:** Choose the index that will be selected by default on the Standard Search page. Click Anywhere, or click First Configurable Attribute to use the first attribute in the search configuration as set in Configuration Editor.
- **default_language**: Select the language you want to display by default when Oasis is launched.

enable_language_en

enable_language_es

enable_language_fr

enable_language_de

enable_language_it

enable_language_zhtw

enable_language_zhcn:

Click off to disable any of the other languages.

- **enable_bookbag**: The book bag allows patrons to save search results. Click off to disable the book bag feature.
- **enable_save_bookbag**: This option allows patrons to save the list of items in their book bag to a storage medium such as a disk or flash drive.
- **enable_email_bookbag:** This option allows patrons to email the list of items in their book bag.
- **enable_persistent_bookbag:** This option saves all items placed in the book bag if a patron signs on anytime during his or her session. If the patron never signs on, all items in the book bag are deleted when Oasis resets. Click off to disable persistent book bag. For more information, see the video about using the book bag feature.
- **enable_account:** This option allows patrons to view information about their account, such as current and past transactions. Click off to disable the My Account feature.

The next few settings apply to the patron account features. Click off to disable any of these features: account information; current transactions; historical transactions; and change sign in and/or password.

The next few settings enable links for additional patron account features: renewing items, reserving items or canceling reserves, requesting items by interlibrary loan. Click **on** to show the links; click **off** to disable and hide the links; click **access** to only show and enable the links when the patron is logged in with the appropriate permissions. This option allows you to indicate an email address that will receive a blind carbon copy of each Interlibrary loan request, if desired.

- **enable_search_progress:** When search progress is enabled, during the search process a window shows blue and yellow balls moving to indicate that the search is happening.

The next group of options has to do with the formats and sort order for different types of records. For each record type, select the format that will display by default on the Results page.

For each record type, select the format that will display by default on the Details page.

For each record type, select the sorted order that search results and book bag pages will display by default.

- **enable_show_preferences** allows for the display of the Mandarin databases and libraries on the search page as well as under Libraries in the left menu. Select true to display the databases and libraries only under the Libraries link.
- **enable_stop_words** allows the program not to include small, common words such as articles, some prepositions, and so forth, in the search process.
- **enable_spell_check** allows the program to check search terms entered against the built-in dictionary to catch possibly misspelled words.

Click Save to apply and save these settings to your Library Options in Setup.

All of these settings may not be available in your setup. If there are settings here that you would like to change from the default but do not show in your setup, please contact Mandarin technical support.

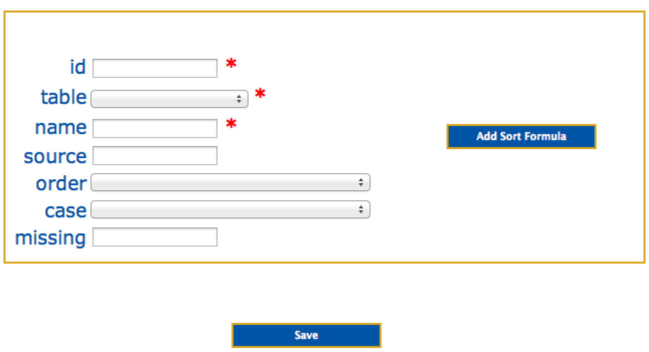
Sort Formulas

Indicate the sort formulas you want to be available in the Results and Bookbag pages. Eight default formulas (with their language translations) are provided.

Adding a Sort Formula

1. Scroll down to the bottom of the page. In the ID box, type the ID for the new formula, and then click Add. This adds a new entry to the page.
2. Type the language translations in the Name boxes, if desired.
3. In the Source box, type the field and subfield data for the sort formula.
4. In the Order box, select Ascending or Descending.
5. In the Case box, select Sensitive or Insensitive.
6. In the Missing Value box, type the value to use when there is no data in the record that corresponds to the key.
7. When finished, click the Add button to the right of the entry, and then click Save at the bottom of the page.

***Tip**: To add a secondary sort to an existing formula, follow steps 3 through 7 in the empty gray box below the desired formula.*

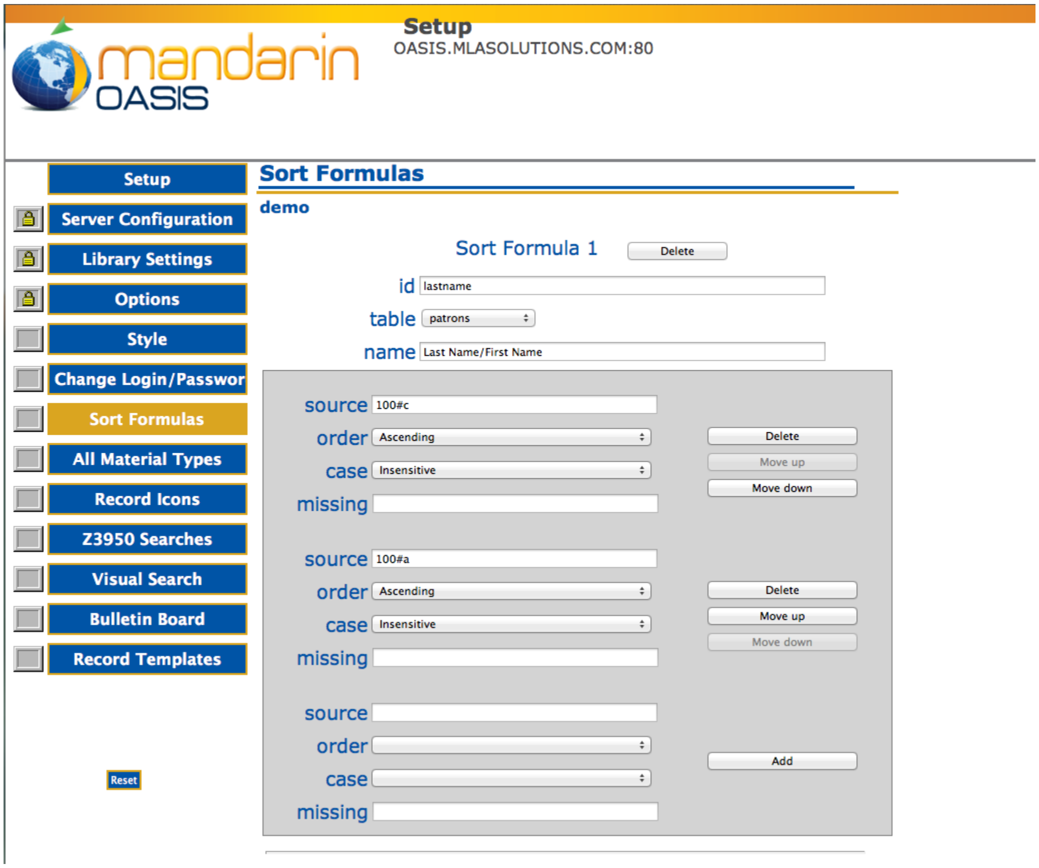


Modifying, Moving, or Deleting a Sort Formula

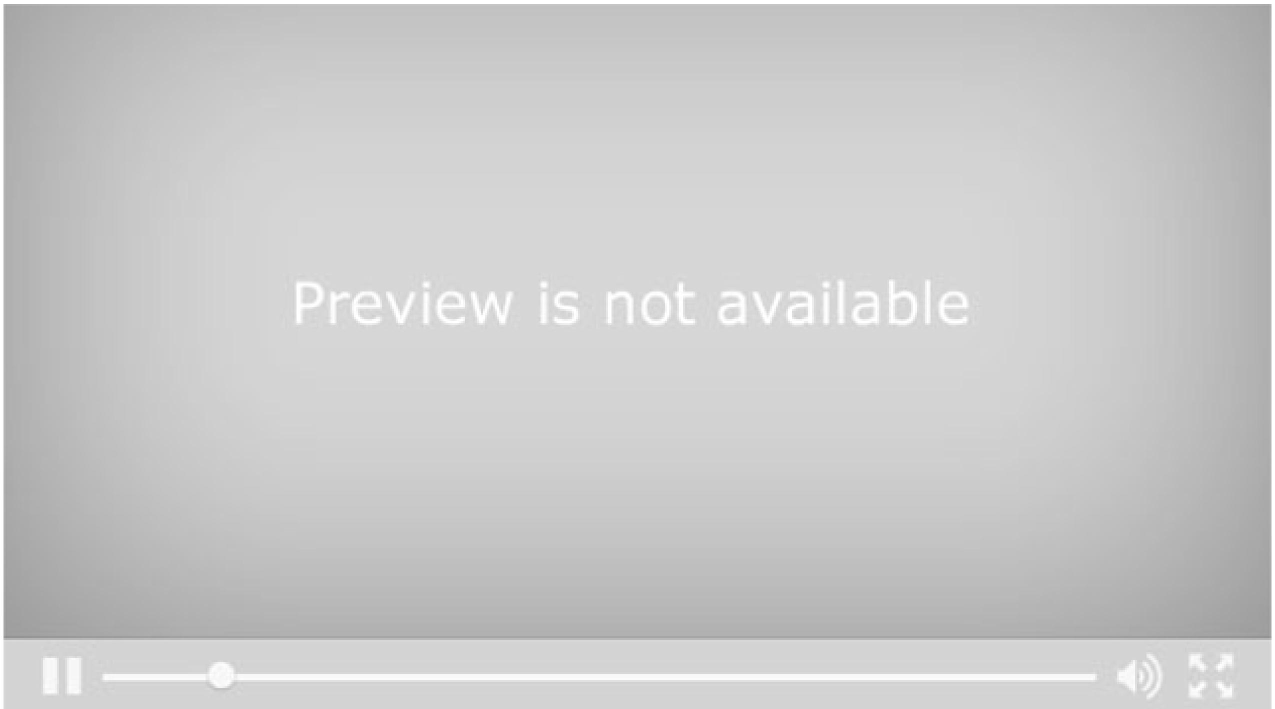
- To modify an entry for a sort formula, enter the new information as desired. Then click Save at the bottom of the page.
- To move a sort formula (therefore changing its priority), click the corresponding Move Up or Move Down button until the formula is in the desired position on the page (with the top being the first key). Then click Save at the bottom of the page.
- To delete a sort formula, click the corresponding Delete button. Then click Save at the bottom of the page.

When finished with the Sort Formulas section, clicking Save at the bottom of the page returns you to the Configuration page.

***Note**: If an item matches more than one media type, the matching icon that is closest to the top of the page will display for the item.*


Setup
OASIS.MLASOLUTIONS.COM:80
mandarin
OASIS
Setup
Server Configuration
Library Settings
Options
Style
Change Login/Passwor
Sort Formulas
All Material Types
Record Icons
Z3950 Searches
Visual Search
Bulletin Board
Record Templates
Reset
Sort Formulas
demo
Sort Formula 1
Delete
id
lastname
table
patrons
name
Last Name/First Name
source
100#c
order
Ascending
case
Insensitive
missing
Delete
Move up
Move down
source
100#a
order
Ascending
case
Insensitive
missing
Delete
Move up
Move down
source
order
case
missing
Add

Z3950 Searches



When Record Fetch is selected in Oasis Cataloging or the WebOPAC, the Libraries link shows the library databases that have been set up as Z39.50 sources. These databases can be added and modified through your setup page.

To make changes to the Z39.50 sources on your Oasis setup page, first log in to your Setup. At this page, click on the **Edit** button in the line for the installation whose settings you want to edit.

Click on the button for **Z3950 Searches**. [This is where you can add and modify Z-search library databases to be used by the Record Fetch in Oasis and the WebOPAC.]

Z39.50, of course, refers to the standard protocol for searching and retrieving information from remote computer databases. In Oasis and the Mandarin WebOPAC, this protocol is built in to allow librarians to find catalog records in other libraries and download or import them.

The program comes with the **Library of Congress** set as the default database. The information that is needed to add another library is what is entered in the host, port and database name fields. There are several different sources that collect this information from libraries, or you may need to contact a library directly to find out this information. Not all libraries, of course, allow Z39.50 access to their catalogs.

To add a new library to your sources, click on **Create New Search.**
In **description** enter any short note describing the source, if it is not obvious from the name.
In **name** enter the name of the library or database as you want it to display in Oasis Record Fetch.
In **host** enter the url or IP address of the catalog.
In **port** enter the port number for the catalog.
In **dbname** enter the name of the database as it is identified at the institution.

If the institution requires login and password to access their Z39.50 service, enter that information here. The British Library, for example, requires authentication but will provide a librarian with a login and password upon request.

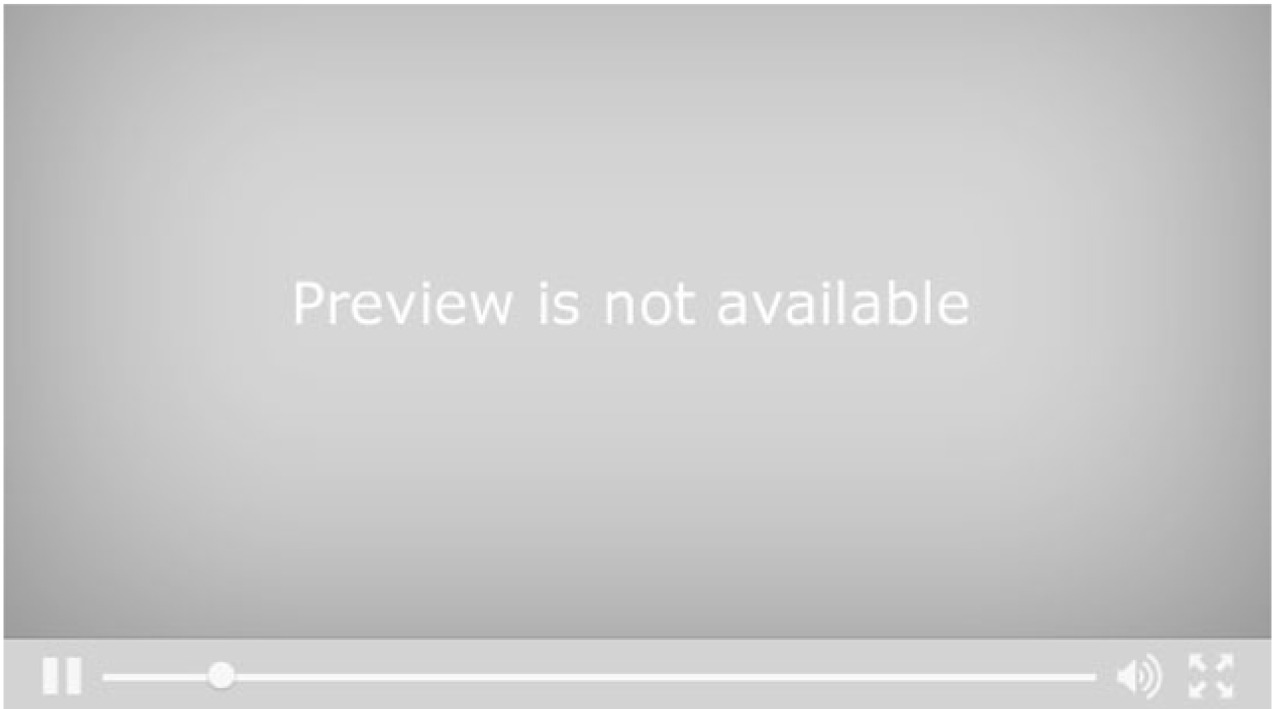
This option allows you to choose whether the database is always selected in Record Fetch. If you want to choose which databases are selected each time you use Record Fetch, choose false here.

This option allows you to choose whether to convert imported or downloaded records to MARC8 character set, or to UTF8 character set, or to leave the records unchanged.

This option allows you to choose to have all MARC fields in the 900 range, which are usually local to a specific library, removed from records you download or import through Record Fetch.

Click **Save**. Your new database will appear in Record Fetch the next time you launch Oasis or the WebOPAC. See the video on using Record Fetch for more information on this feature.

Visual Search



Visual Search is a graphical interface that allows patrons to narrow a search from a topic to sub-topics, ultimately reaching search results. You can also create components that directly launch a search query or open a Web page.

Visual Search comes with several levels of default search components. You can customize your Visual Search screen by modifying the default components or by creating new components. There is no limit to the number of components you can add to Visual Search.

To customize your Visual Search, log into your Oasis. On the Visual Search page you will see a link for Configure Visual Search.

Clicking on this link brings you to the login page for Setup. Once you have logged in, you are taken right to the Visual Search setup page. This page is also accessible from the main Setup page, after you have clicked on the edit button for the installation you want to configure. The Visual Search button is in this list of features to configure.

On the Visual Search Configuration page, the components are identified with labels in parentheses indicating whether each component is a topic, a query, or a link.

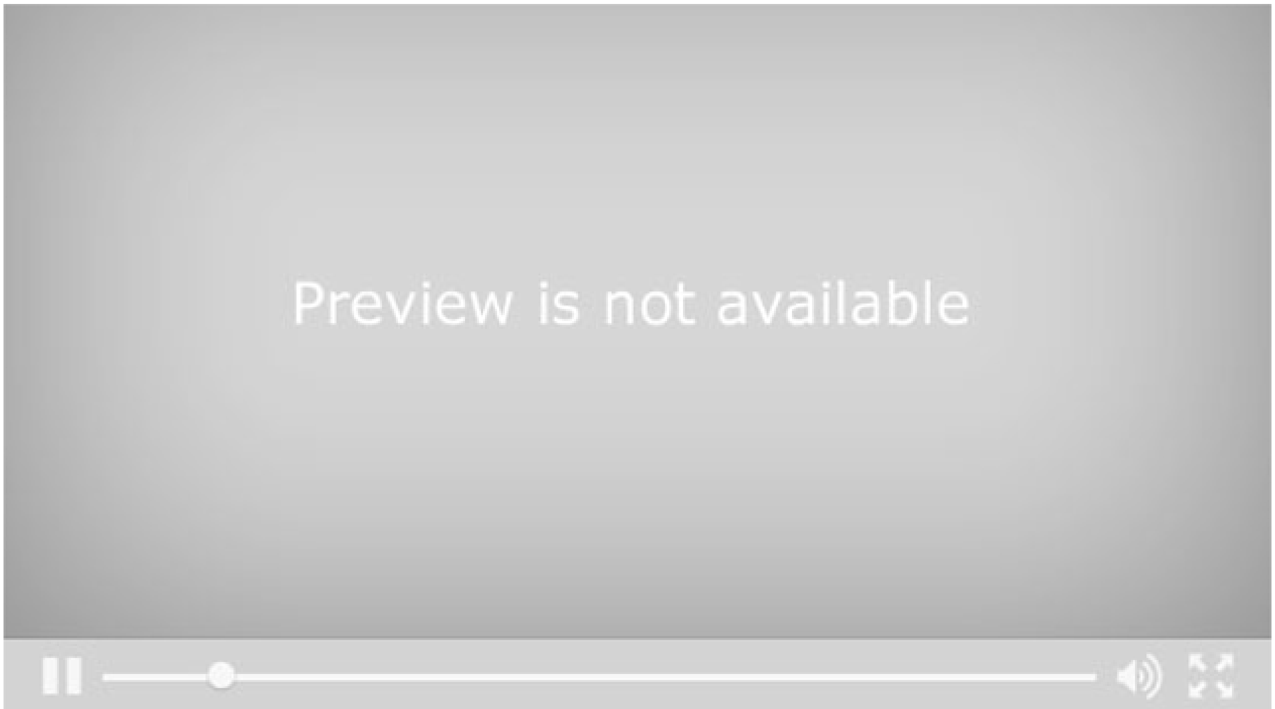
Components can be modified or deleted totally by choosing modify or delete in the drop down menu. The components can also be rearranged by using the move left and move right choices in the drop down menu.

To create new components, select the type of component you want to create at the bottom of the page.

Create a topic component if you want to launch sub-topics. Click on **Create New Topic**. For the new topic, click on the drop down menu and choose **Modify**. You will see the Topic Component Configuration dialog box. To add a new image at this window, click **Browse**, navigate to where you have a saved image, click **Open**, and then click **Upload**. If the image you want is included with Oasis, click on **Application** and scroll down to see and choose from the included images, or click on **Installation** and see and choose from images already uploaded. In the **Caption box,** type the caption that will appear under the component. In the **Description box,** type the description that will appear when the cursor points to the component. Click **Save**.

You can choose a language for the caption and description of this component. You can create multiple captions and descriptions and images for each component, to go along with the languages of the rest of the interface. In other words, if you know you have patrons who want or need the interface in a certain language, such as Spanish, then have a Spanish caption and description for each Visual Search component as well as an English one.

Bulletin Board



The Mandarin OPAC now has four or five components making up what we call the Bulletin Board. These are the pictures and links across the top, which you can customize to show scenes from your library and or other graphics with links to other webpages at your institution, or to outside resources such as databases.

To customize your Bulletin Board components, you need to go to your Setup page. To get there, you can log into your OPAC and click on the **Enter Setup button.**

This will bring you to the login page for setup. **Login.**

and you come to a page like this. Click on the **edit button** for the installation you want to customize. Then go to the **Bulletin Board button** on the left.

Here you can see the pictures or graphics. They are numbered from the left. To modify number one, the leftmost one, for example, click on **Browse** and find the picture you have saved. Then click **Upload** to bring it into your installation.

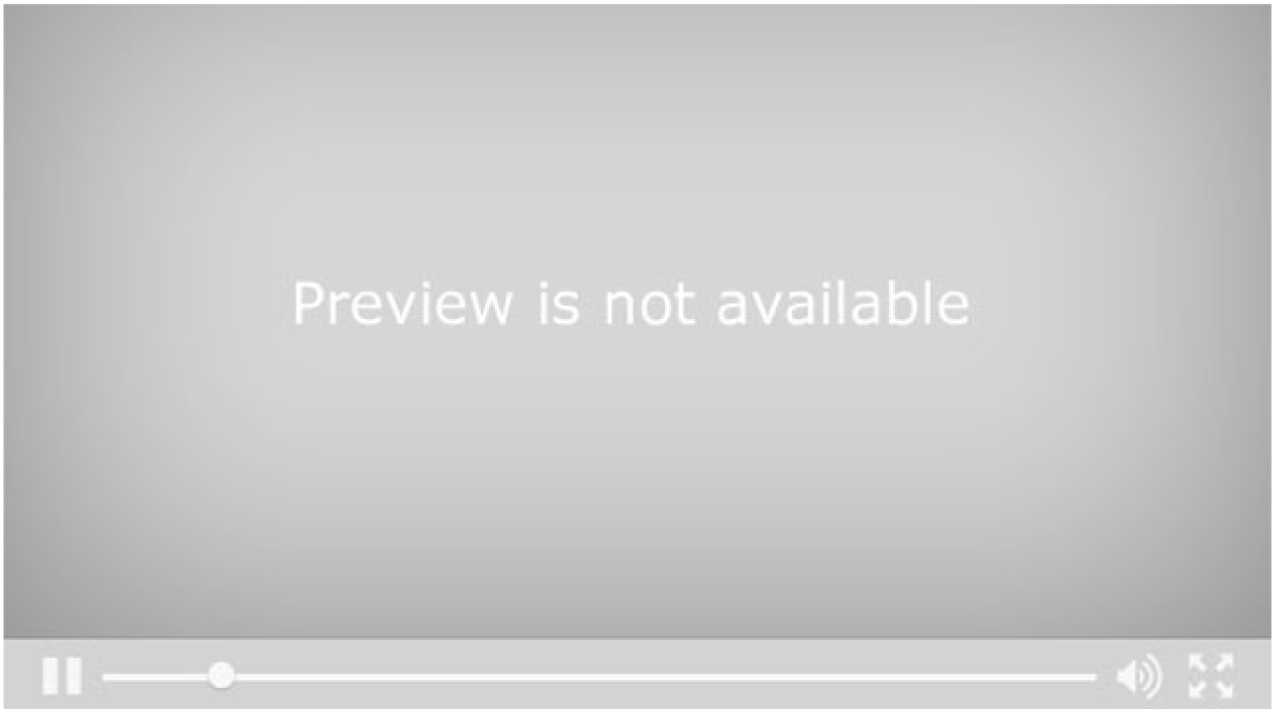
The corresponding link is up here, numbered the same way. Enter the link for the web page this picture should open.

Modify each component with the desired picture and corresponding link.

When you are finished, click **Save**.

It is a good idea to then click on the word **Setup** to go back to the installation list. Click on the **name of the installation** to open a fresh page, so that you can check and make sure the pictures and links look and work the way you want.

Material Types



The Mandarin Oasis and WebOPAC search interface includes a list of material types that allow the user to filter the search results.

The list is in this drop down menu. The patron, for example, can choose to search for a specific title of subject in DVD format, by selecting DVD from the list and then searching as usual. If the catalog records are correctly coded, the results will be filtered correctly.

The list can be totally customized for your library. To configure your Material Types list, login to Oasis as librarian and click on the **Enter Setup button.**

Login to Setup.

Click on the **Edit button** in line with the installation you want to customize.

Click on the **All Material Types** button.

There are 17 pre-defined material types. Each one has a name and a query. The query contains the fields and subfields used to match an item to a material type.

You can rename any of the provided material types by simply editing the name. You might want to rename Non-musical sound recording to say Audiobooks, for example. Go to the bottom of the page and click **Save** to save your changes.

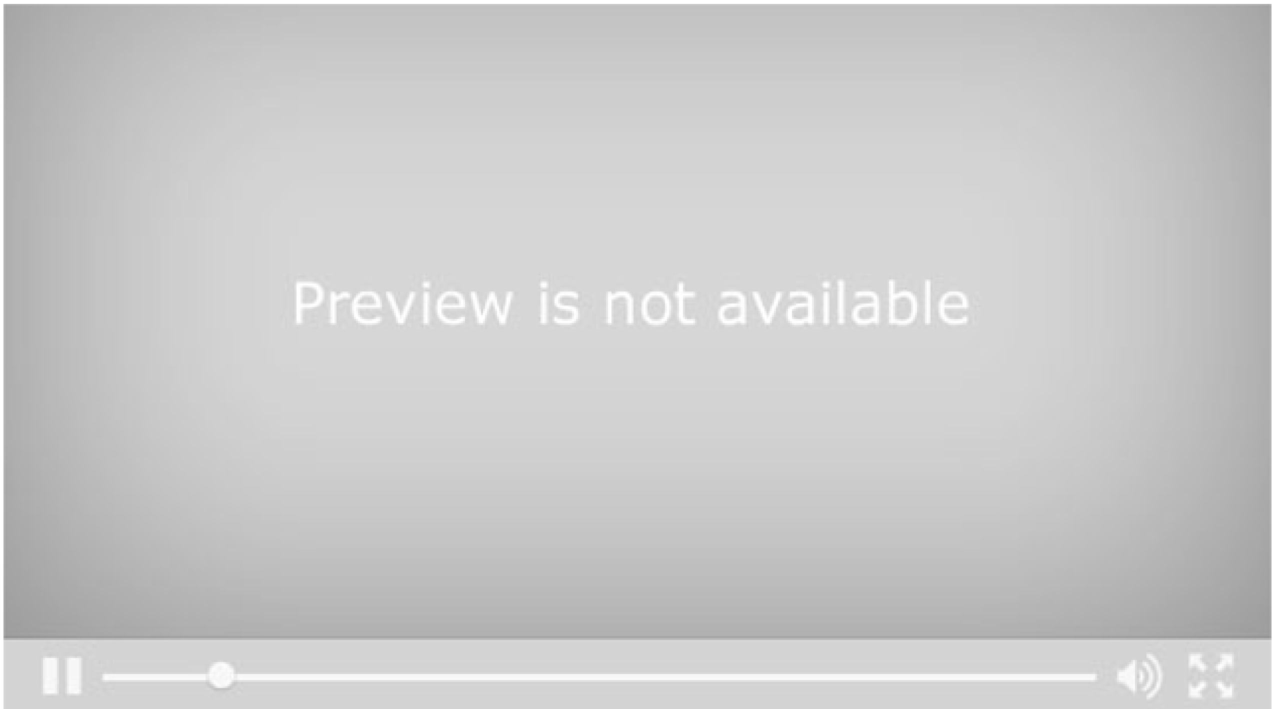
You can delete any of the provided types, if you want, for example if you do not have any of that type in your collection.

You can also add your own types to the list. At the bottom of the page, enter the name of the type, and then enter a query. Most of the provided material type queries refer to control fields, which have positions rather than subfields. These are indicated by brackets. To indicate a subfield, use the pound sign or hash mark. In this example graphic novels are indicated in the collection by a call number prefix of GN.

Click **Add** material type. Then click **Save**.

The material type list can be used to allow filtering of searches by other special collections. Here is an example from a library that has completely reconfigured the list to allow patrons to search within several different subsets of the collection.

Record Templates



There is a new feature in Version 2.8 of Mandarin Oasis that I would like to show you. The program now allows the librarian to create and modify cataloging templates. For bibliographic records this will be especially helpful for any librarians who do original cataloging. Being able to modify the holdings templates will be useful in every library.

Here's how it works

First, in order to use this feature, to be able to create or modify templates, you need to go to your Setup page. There you'll see a new option at the bottom of the dock on the left called Record Templates.

When you have logged in, clicked on the **Edit** button for your installation, and selected this option, you'll see all the templates that are currently available for your installation. The default selection for each type of record is None. If you leave the default there, you will have the standard templates that come with the program, and you will not have the option to make new templates. If you want to be able to modify and create templates, select one of the templates listed. If the book template is the one you use the most for creating bibliographic records, choose that. For each type of record choose the one that you will use the most.

When you next log into Oasis as a librarian and want to add that type of record, you will see your choice as the default, and you'll see the Save as template button at the top of the Basic Editor. Now make the changes that you need to make. At the very least you will probably want to put in your location information, for example, so that you don't need to type it every time. Add or change any other information that you want in your records. In this holdings template for example, I'm going to put p and usd in the price subfield so I remember that the cost goes in that format. If you need to add or delete any fields or subfields, you can do that in the Advanced Editor. Then click **back** to the Basic Editor and click **Save** as Template. You can replace one of the default templates, or you can give your template a unique name.

When you look at your Setup page again, you'll see your new template in the list for this type of record. You can set it as the default, or you can delete it here, if it's not what you want.

Using the Group Editor

Attention: You must either set up a hierarchy of patron groups based on permissions, or you must disable the hierarchy.

About the Group Editor

The Group Editor is used to create and modify the groups that Mandarin Oasis requires to function. Each group has a customized set of parameters and permissions.

There are three types of groups in Mandarin Oasis: Patron, Item, and Special Reserve.

- **Patron groups** – Each patron record in the Mandarin Oasis system must be assigned to a patron group to establish circulation permission for the patron, as well as to set the level of access to Patron and Librarian Mode. A library might work with patron groups such as General Patron, VIP Patron, Volunteer, Staff Member, and Director. Permission to access patron groups is set by a user higher in the hierarchy than the patron group, and patrons cannot change which groups they can access. You can create an unlimited number of patron groups, although a patron can only be assigned to one group. The patron group information is stored in the 991#a of the patron record.

- **Item groups** – Each holding record must be assigned to an item group to establish the item's circulation parameters. A library might work with item groups such as general collection, reference collection, periodicals, equipment, and rare books. Permission to access item groups is set by a user higher in the hierarchy than the patron group, and patrons cannot change which groups they can access. You can create an unlimited number of item groups, although a holding record can only be assigned to one group. The item group information is stored in the 991#a of the holding record.

- **Special Reserve groups** – When a library needs to accommodate unusual circulation restrictions for a defined patron set, a special reserve group can be created. For instance, you might create a four-week special reserve group to restrict certain science books to in-library use by students involved in a chemistry project. Permission to access special reserve groups is set by a user higher in the hierarchy than the patron group, and patrons cannot change which groups they can access. You can create an unlimited number of special reserve groups, and patrons and items can be assigned to multiple special reserve groups. Special reserve group permissions override item group permissions. Special reserve group information is stored in the 991#b of the patron and holding record. Subfield b is a repeatable subfield.

Sign In to Groups

In order to use the Group Editor, you must sign in to the Catalog with the appropriate permissions.

1. Click the **Sign In** link that appears on the right side of most pages in the Catalog.
2. Type your login name in the **Login Name/Barcode** box.
3. In the **Password** box, type your password.
4. Click **Sign In**. Mandarin Oasis displays the tabs for all library functions that you have permission to access.
5. Click the **Groups** tab at the top of the page.

NOTE: If you need to sign out, click the Sign Out link on the right.

Creating the Group Hierarchy

The group hierarchy indicates which patron, item, and special reserve groups each individual patron group can modify in Group Editor. The hierarchy is determined by the entry in the Created by Patron Group box, which is located on the **General** page for each patron, item, and special reserve group. This entry determines which groups display on the **Group Access** pages. Permissions to modify patron and item access are then established on the Group Access pages.

If you do not want to create the group hierarchy, you must disable this feature in the Global.ini.REG file (the default path is C:\M3 Server\Registry\Common) by changing the Group Hierarchy entry to Override=off. If disabled, the Group Access rules in Group Editor will not be enforced.

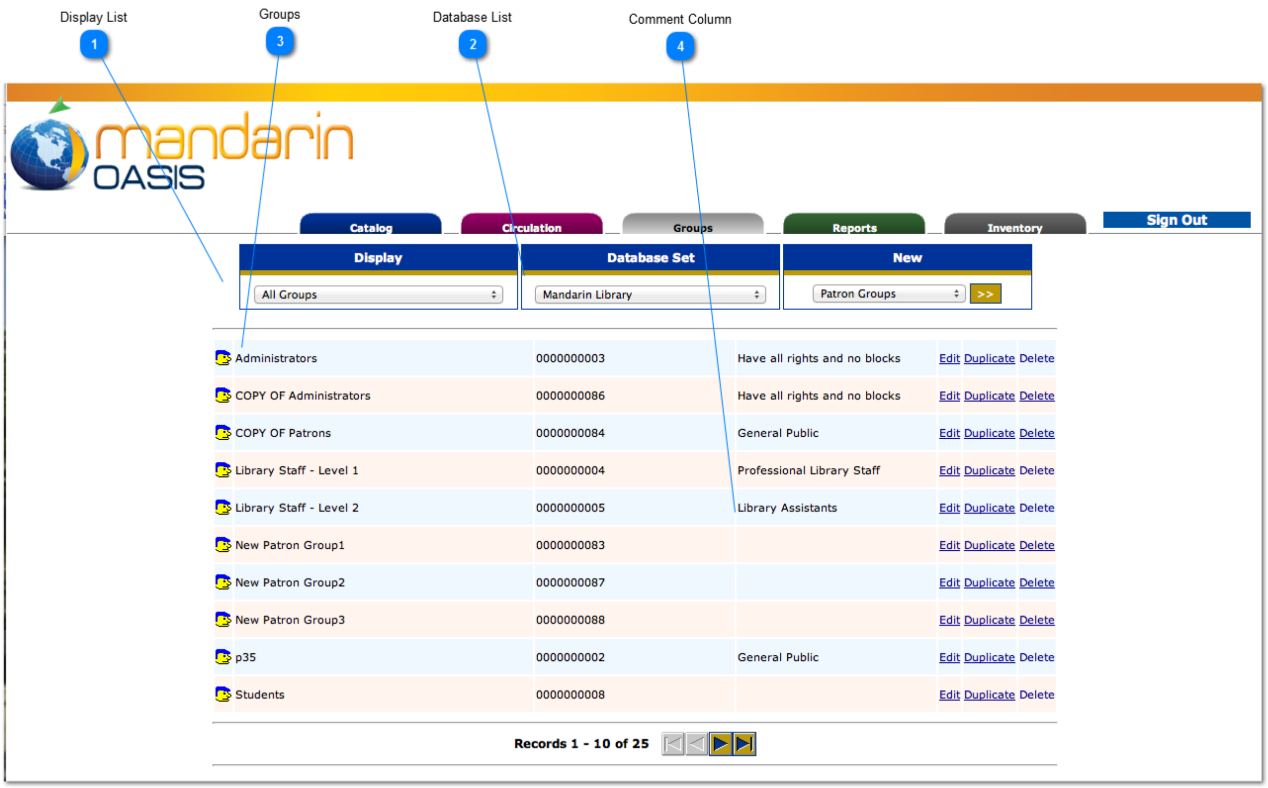
Mandarin Oasis includes four default patron groups: Administrators, Librarians, Library Assistants, and Patrons. The hierarchy has been created for these groups. Mandarin recommends that these groups be used; they cannot be deleted. You can modify these groups or create additional groups, if desired. These four groups have the following permissions:

- Administrator (first level) – has permission to modify access of all groups
- Librarians (second level) – has permission to modify access of Library Assistants and Patrons
- Library Assistants (third level) – has permission to modify access of Patrons
- Patrons (fourth level) – has no permission to modify access of other groups

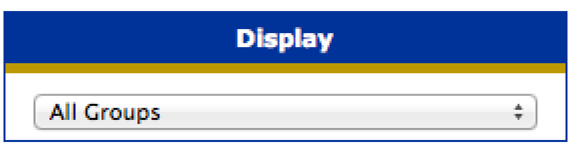
If your library requires additional patron groups, use the following procedure to add groups to the hierarchy and establish permissions. In this example, a user in the “Librarians” group has created a “Faculty” group, which will have the same permissions as the group “Library Assistants.”

1. On the main Group Editor page, locate the Faculty group and click the Edit link to the right. This opens the **General** page for the Faculty group. In the **Created by Patron Group** box, select **Librarians**. (No patron groups that were also created by the Librarians group will have access to the Faculty group unless indicated on the Group Access page.)
2. On the menu, click **Group Access**. The groups without access to the Faculty group display in the **Groups Without Access** box. To grant one or more of these groups access to the Faculty group, select the group in the **Groups Without Access** box, then click the << button. This moves the patron group to the **Groups With Shared Access** To Current box.
3. When finished, click **OK**.

Group Editor Features

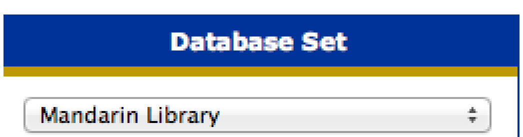


1 Display List



Display list – Contains the list of display options for this page. You can display the listings for all groups or only a particular group type (patron, item, or special reserve group). To change the displayed group type, select an option in the Display list.

2 Database List



Database list – Contains the list of Catalog databases available in Mandarin Oasis. Your Mandarin Oasis system can access multiple Catalog databases. If multiple databases are available, select the desired database in the Database Set list.

3 Groups

Administrators	0000000003	Have a
COPY OF Administrators	0000000086	Have a
COPY OF Patrons	0000000084	Genera
Library Staff - Level 1	0000000004	Profess

Groups – The list of available groups. The icon identifies the group type: a head signifies a patron group, a book signifies an item group, and eyeglasses signify a special reserve group. From this page, you can create, edit, duplicate, and delete groups.

4 Comment Column

Library Assistants

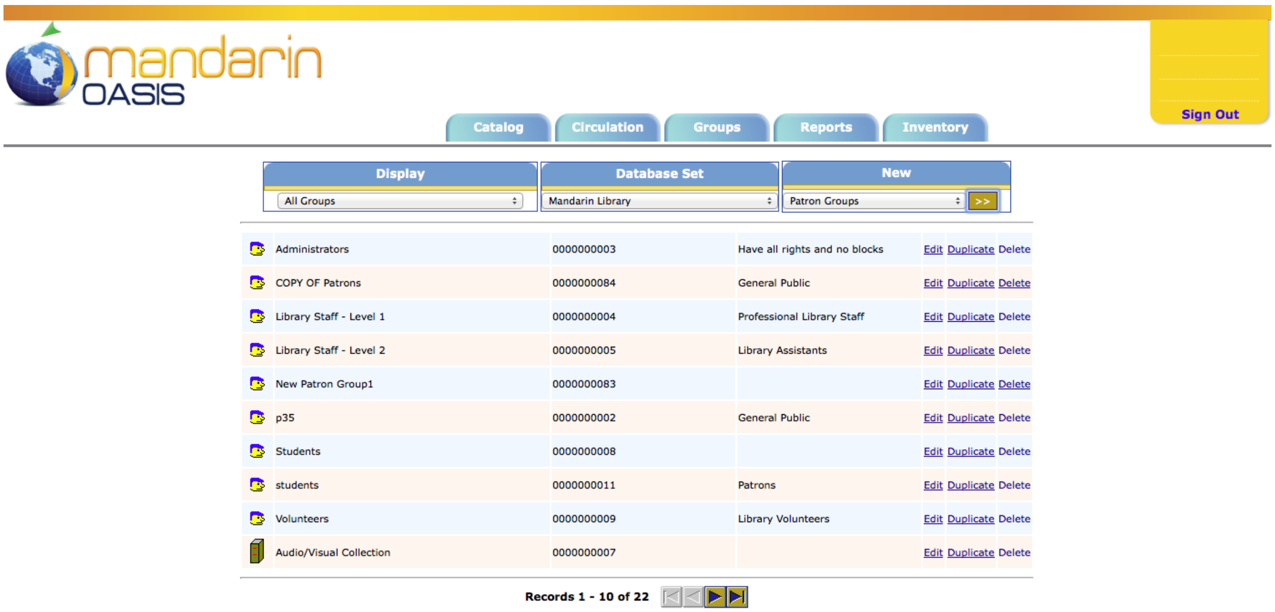
Comment column – Displays any comment entered in the Description box, which is located on the General page.

Working with Patron Groups

Note: *Patron groups must be in the program before you can enter or import patron records into the Catalog. Some groups are installed with the program.*

Creating a New Patron Group

1. Select a Catalog database in the **Database Set** list.
2. In the **New** list, select **Patron Group**, then click the >> button on the right. This creates a "**New Patron Group1**" entry.



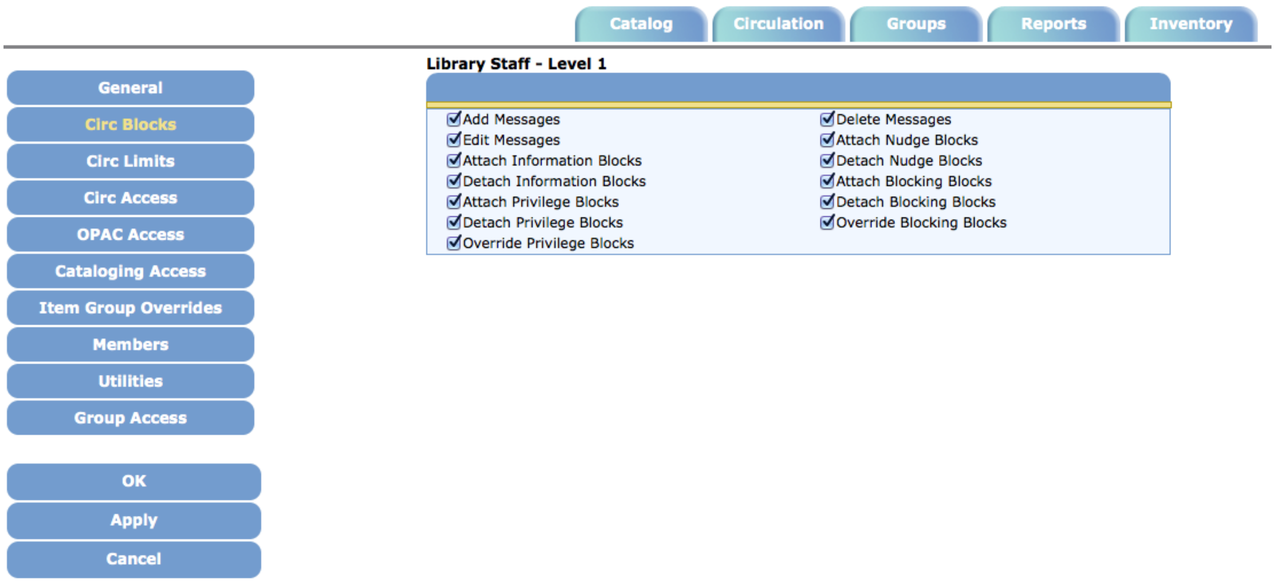
***Note:** If the new entry does not appear, verify that **All Groups** or **Patron Groups** is selected in the **Display** list.*

3. Click the **Edit** link to the right of the new group. This opens the **General** page for the new group. Proceed with the following sections to enter information for this group.

General. On this page, enter identification information for the group.

1. In the **Name** box, type a distinguishing name for the patron group.
2. In the **Description** box, type any information needed to describe this group. This will display on the main Group Editor page.
3. The **Created by Patron Group** box displays the patron group of the user that created this group. Only administrators can modify this entry.
4. In the **Card Expiration Period** box, type or select the number of days a library card issued to a member of this patron group remains valid before requiring renewal.
5. Click **Apply** to save your entries on this page, then click Circ Blocks in the side menu and proceed to the next section.

***Note**: When a new patron record is added to the system, the record is assigned to a patron group. In many libraries, the unique barcode for that patron is placed on the person's library card. The library card's expiration date is calculated from the number of days entered in the Card Expiration Period box, using the date the new patron record was created as day one.*

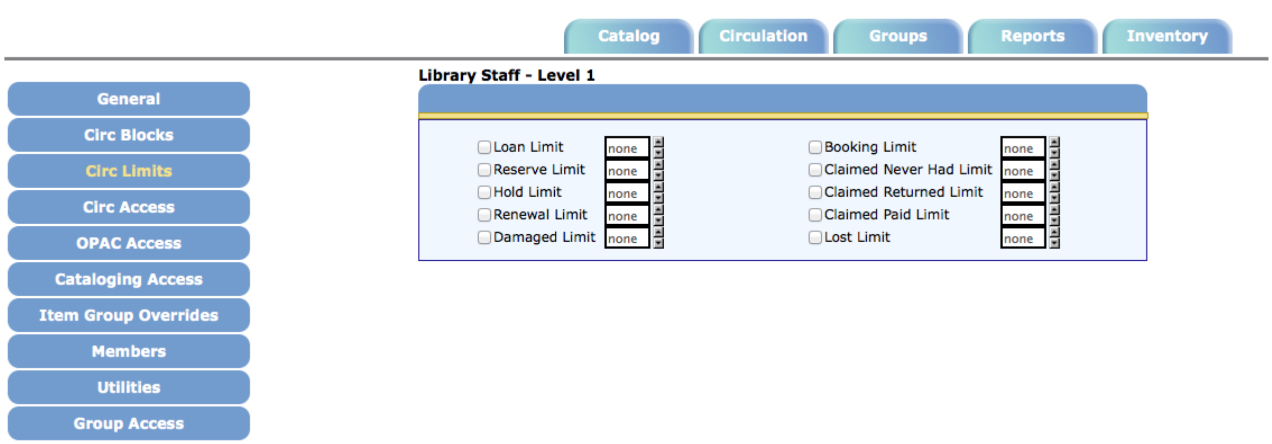


Circ Blocks. On this page, customize the patron group's rights to add, modify, place, remove, and override system messages. Typically, selected library staff members require such rights - general patrons do not.

1. Select the functions needed by members of this patron group:

    - **Add, Edit**, and **Delete Messages** allows group members to add, edit, and delete patron and item messages.
    - **Attach** and **Detach Information Blocks** allows group members to attach and detach messages assigned the information block type.
    - **Attach** and **Detach Nudge Blocks** allows group members to attach and detach messages assigned the nudge block type.
    - **Attach, Detach,** and **Override Privilege Blocks** allows group members to attach, detach, or override messages assigned the privilege block type.
    - **Attach, Detach,** and **Override Blocking Blocks** allows group members to attach, detach, or override messages assigned the blocking block type.

2. Click **Apply** to save your entries on this page, then click **Circ Limits** in the side menu and proceed to the next section.



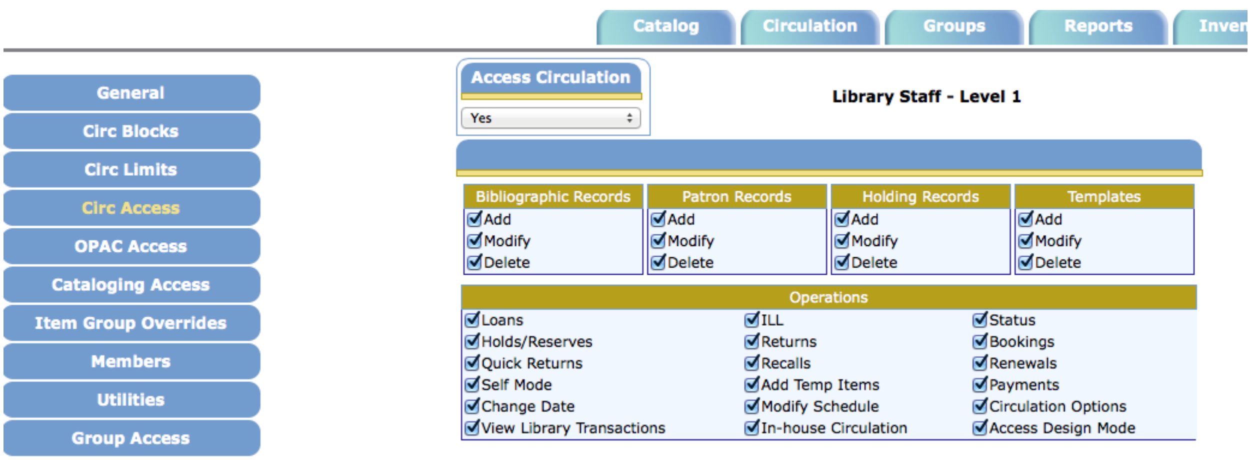
Circ Limits. On this page, customize the circulation quantity limits for the patron group. Specify the maximum number of items for each type of transaction listed.

1. Select a circulation limit, i.e. number of items, for each limit type. To do so:

    - Select the check box next to the desired limit type.
    - In the list next to the limit type, select or enter a limit amount. Enter 0 if none of this type is allowed.
    - Repeat for each limit you want to set. If a limit is not selected, no limit is assigned, i.e. the number of items is unlimited.

2. Click **Apply** to save your entries on this page, then click **Circ Access** in the side menu and proceed to the next section.

***Note**: Depending on your permissions, some of these options may be unavailable.*



Circ Access. On this page, specify whether this patron group is allowed to access any circulation functions.

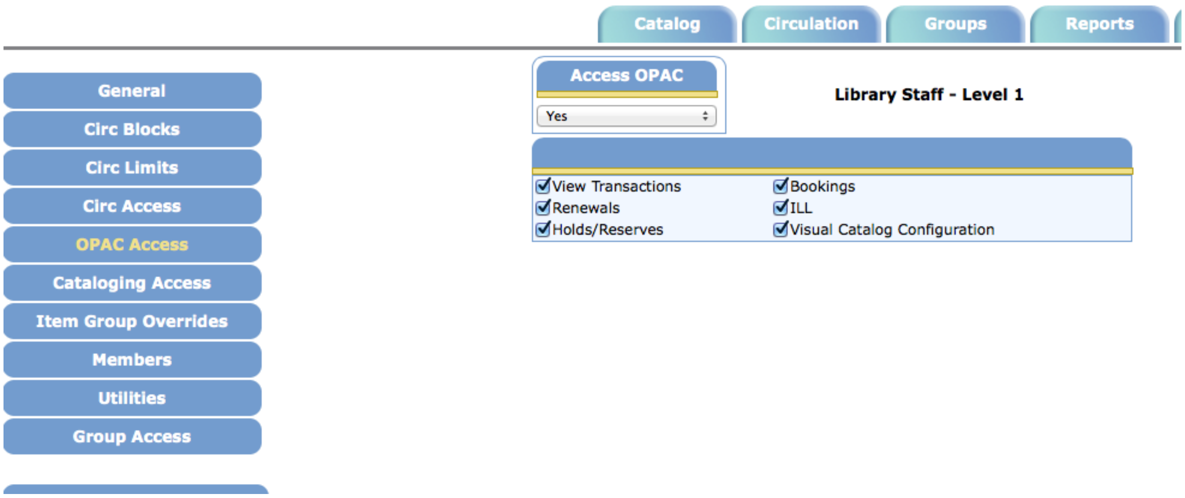
1. In the **Access Circulation list**, select **Yes** or **No**. If you select **Yes**, you can enable any available function listed on the page by selecting the function. Functions are organized into five groups:

    - **Bibliographic Records** – pertains to bibliographic record maintenance
    - **Patron Records** – pertains to patron record maintenance
    - **Holding Records** – pertains to holdings record maintenance
    - **Templates** – pertains to template record maintenance
    - **Operations** – lists various types of circulation transactions

    If you select **No**, all functions listed on this page are disabled.

2. Click **Apply** to save your entries on this page, then click **OPAC** Access in the side menu and proceed to the next section.

***Note**: Depending on your permissions, some of these options may be unavailable.*



OPAC Access. On this page, specify whether this patron group is allowed to access any OPAC functions. The OPAC is the search feature found in the Catalog tab.

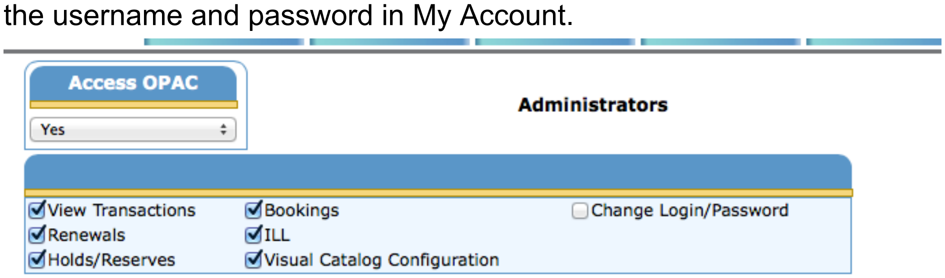
1. In the **Access OPAC** list, select **Yes** or **No**. If you select **Yes**, you can enable any available function listed on the page by selecting the function. Options are:

    - **View Transactions** – allows patrons to view their transactions in the My Account tab
    - **Renewals** – allows patrons to renew items
    - **Holds/Reserves** – allows patrons to place a hold/reserve on items
    - **Bookings** – allows patrons to book items
    - **ILL** – allows patrons to request interlibrary loans
    - **Visual Catalog Configuration** – allows library staff to configure the Visual Catalog display

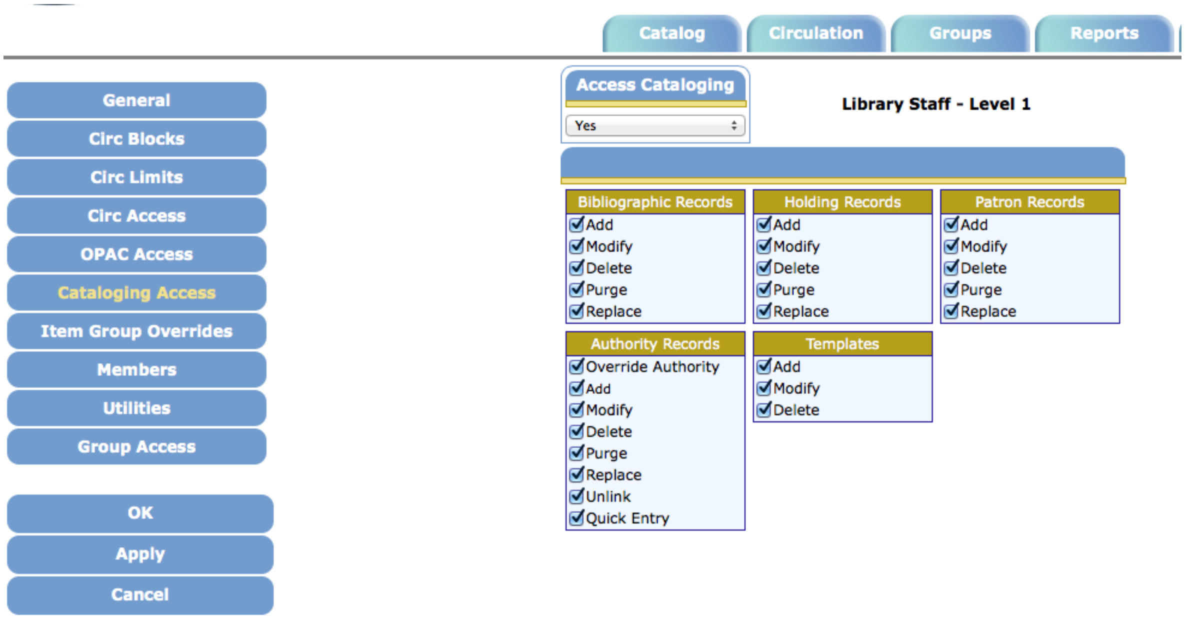
    If you select **No**, all functions listed on this page are disabled.
2. Click **Apply** to save your entries on this page, then click **Cataloging Access** in the side menu and proceed to the next section.

New Features in Release 2.9.3

Group Editor supports a new permission called Change Login/Password to control users' ability to change the username and password in My Account.



***Note:** Depending on your permissions, some of these options may be unavailable.*



Cataloging Access. On this page, specify whether this patron group is allowed to access any Catalog functions.

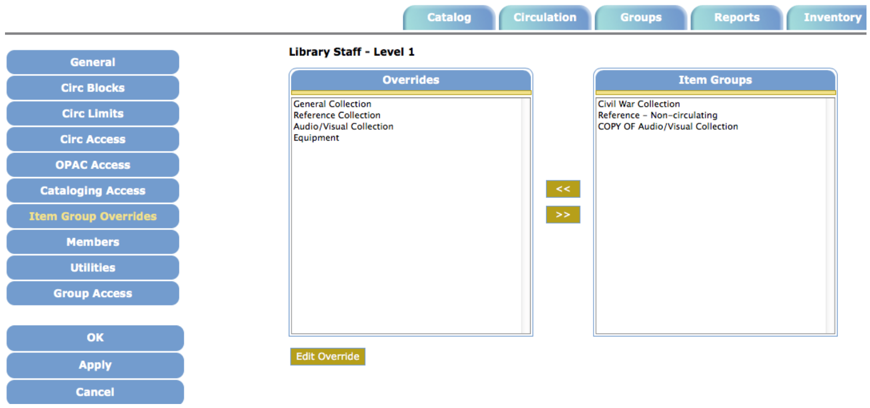
1. In the **Access Cataloging list**, select **Yes** or **No**. If you select **Yes**, you can enable any available function listed on the page by selecting the function. Functions are organized into five groups:

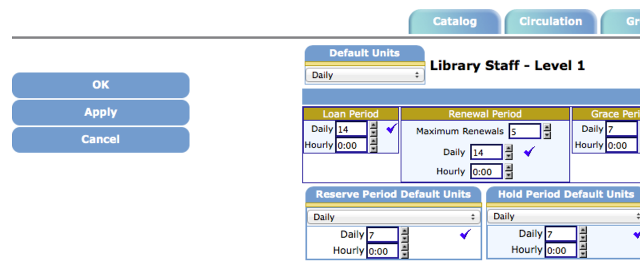
   - **Bibliographic Records** – pertains to bibliographic record maintenance
   - **Holding Records** – pertains to holdings record maintenance
   - **Patron Records** – pertains to patron record maintenance
   - **Authority Records** – pertains to authority record maintenance
   - **Templates** – pertains to template maintenance

   If you select **No**, all functions listed on this page are disabled.
2. Click **Apply** to save your entries on this page, then click Item **Group Overrides** in the side menu and proceed to the next section.

Note*: Depending on your permissions, some of these options may be unavailable.*

Note*: The Override Authority option and the options under Authority Records are available only if you are using a version of Oasis that supports Authority Control.*



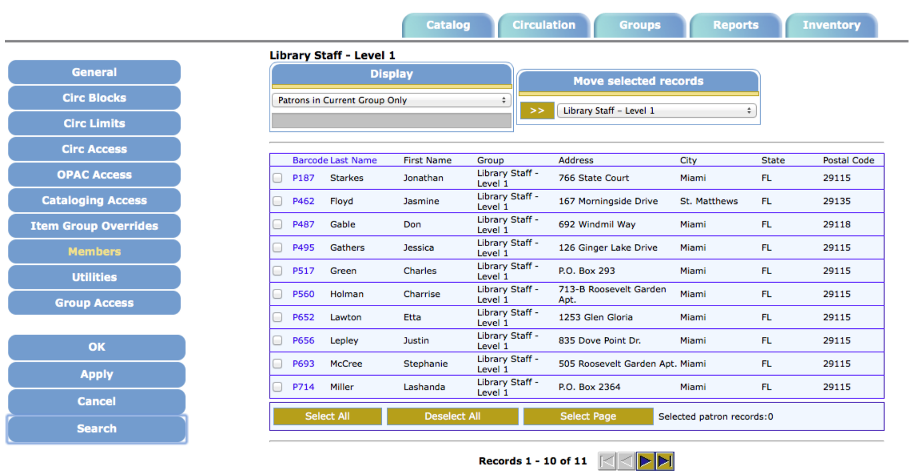


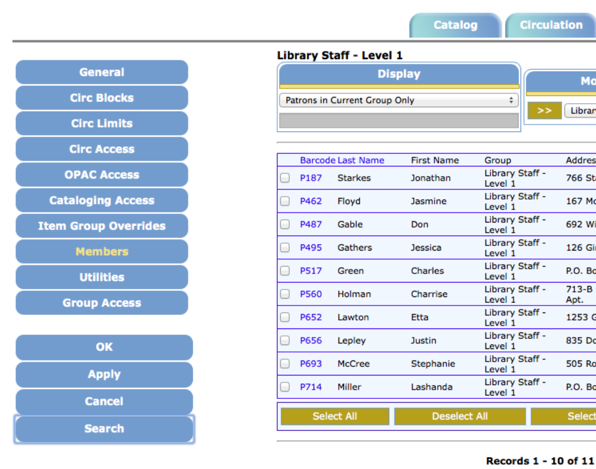
Item Group Overrides. On this page, grant this patron group rights to override specific circulation limits connected to item groups. For example, if the item group "CD Collection" limits the number of loan renewals to one, you can establish a different limit for this particular patron group.

1. In the **Overrides box**, click the item group name. If it is not listed in the **Overrides box**, select the item group name in the **Item Groups** box, and then click the << button. This moves the name to the **Overrides** box.
2. While the item group name is selected, click **Edit Override.** A new page opens that displays the circulation limits for the selected item group.
3. In the **Default Units** list, select **Daily** or **Hourly** as the default time unit for **Loan Period, Renewal Period, Grace Period**, and **Fines.**
4. In **Loan Period, Renewal Period, Grace Period**, and **Fines**, enter the time limit for each period type. Also, enter the following:

   Under **Renewal Period,** enter the maximum number of renewals allowed.

   Under **Fines**, enter the maximum fine amount.
5. Click **OK.** This returns you to the Item Group Overrides page.
6. Click **Apply** to save your entries on this page, then click Members in the side menu and proceed to the next section.





Members. On this page, add and remove patron group members. Skip this page if you have not yet entered any patron records for this group. You can add members to this group later using the Edit function.

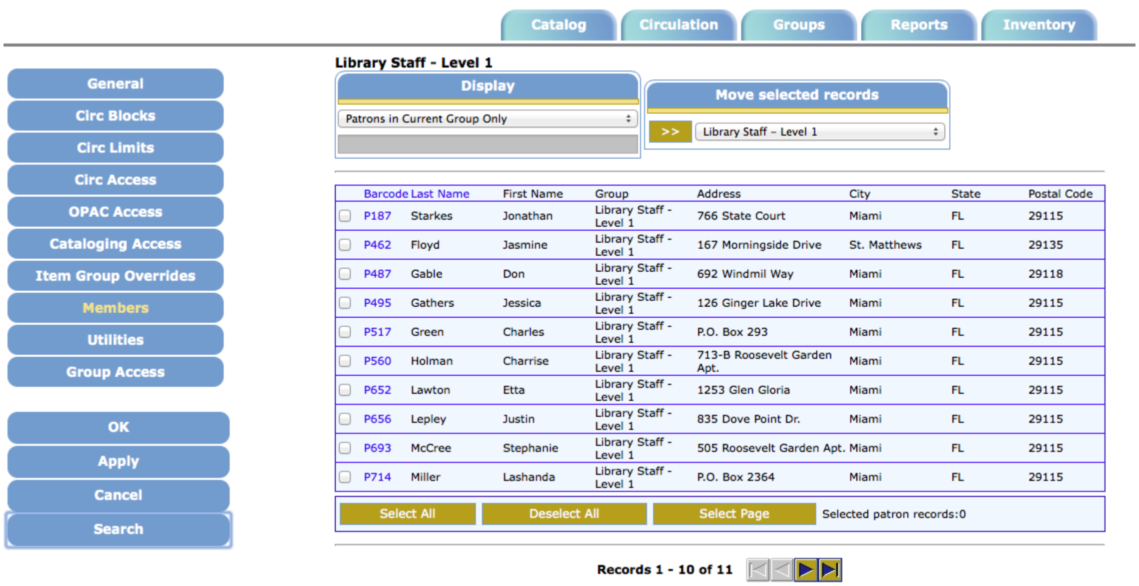
1. In the **Display list,** select **All Patrons**. This displays a list of all patrons, not just patrons currently assigned to this group.
2. Select the check box next to each patron you want to add to the patron group. To locate specific patrons:

- In the side menu, click **Search**. This displays the Search page.
- Type your search query into the appropriate boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator. Then click **Search**. This displays a list of patrons matching your search query.

3. Under **Move selected records**, the new group name displays. To move the selected patrons to this group, click the >> button on the left. This displays the new group with its assigned patrons.
4. Click **Apply** to save your entries on this page, then click Utilities in the side menu and proceed to the next section.

Tip: *You can also scan patrons into the group. To do so, select Scan Patrons into Current Group in the Display list. Then scan the patron's barcode or type the barcode in the Barcode box.*

Tip*: Click Select All at the bottom of the list to select all patrons listed.*



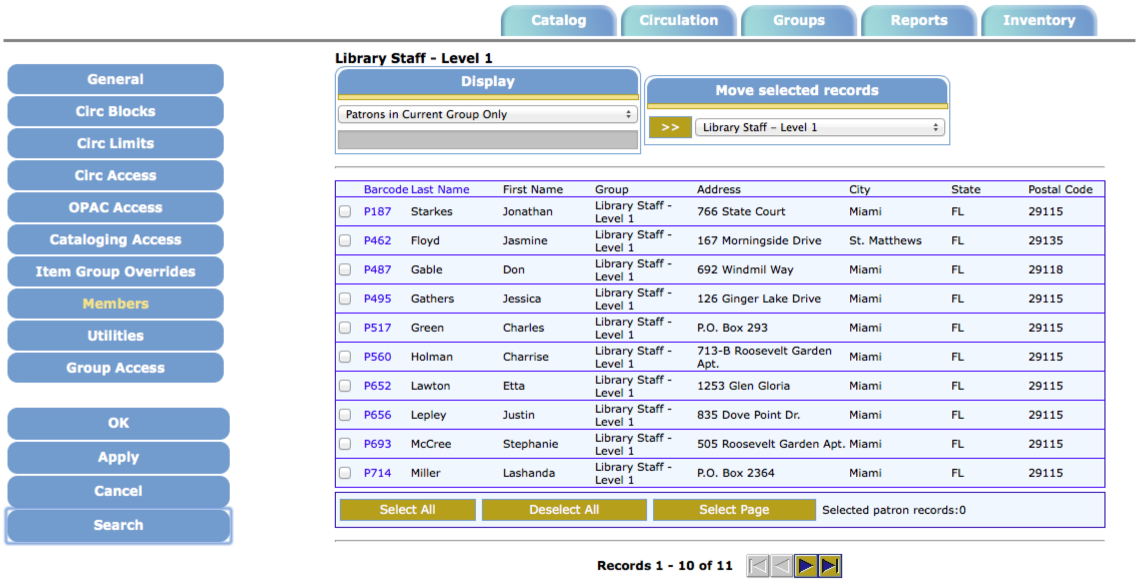
Utilities. On this page, specify whether this patron group is allowed to access any of the functions listed.

1. To allow access to a utility, select the corresponding check box. Options are:

- **Inventory** – allows members of this patron group to view and conduct inventory functions through Oasis Inventory
- **Group Editor** – allows members of this patron group to view and conduct functions in the Group Editor
- **Configuration Editor** – allows members of this patron group to perform configuration functions in M3 Configuration Editor
- **Report Generator** – allows members of this patron group to view and create reports through Reports

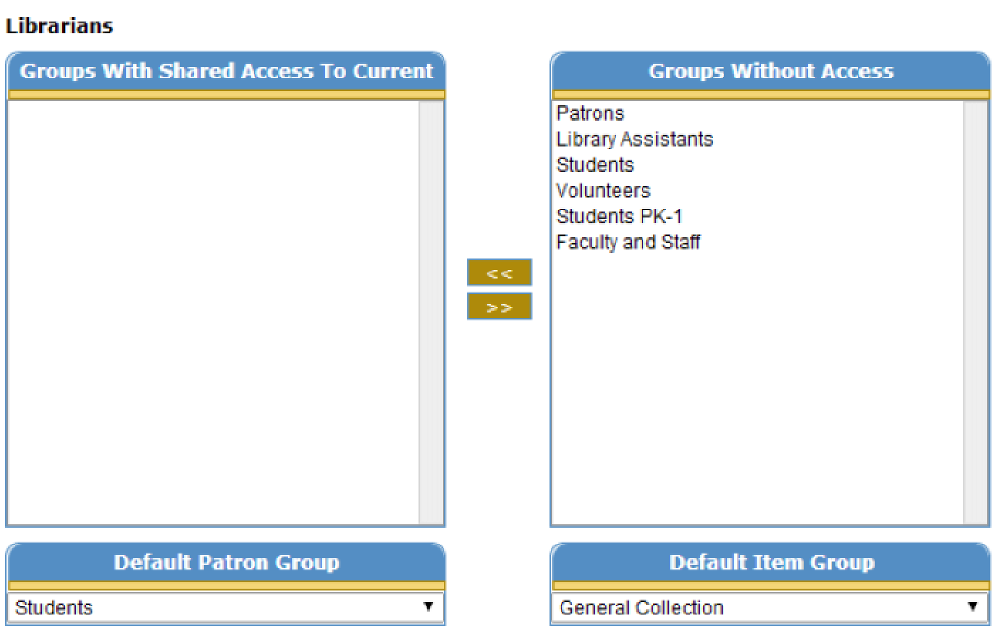
2. Click Apply to save your entries on this page, then click Group Access in the side menu and proceed to the next section.

Note*: Depending on your permissions, some of these options may be unavailable.*



Group Access. On this page, specify which patron groups you want to have access to this group.

1. The **Groups Without Access** box displays the patron groups that do not have access to make changes to this group. To change the group access, click the **patron group** that you want to have access to this patron group, then click the << button. This moves the patron group to the **Groups With Shared Access** To Current box. Repeat this for all groups that you want to have access to this patron group.
2. In the **Default Patron Group** list, select the patron group that you want to appear as the default group when a member of this patron group creates a patron record in the Cataloging and Circulation modules. This default group appears in patron records in the Standard Group (991#a) field.



3. In the **Default Item Group** list, select the item group that you want to appear as the default group when a member of this patron group creates a holding record in the Cataloging and Circulation modules. This default group appears in holding records in the Standard Group (991#a) field.

4. Click **OK** to save your entries on this page and return to the Group Editor home page.

Modifying Patron Group Permission

To modify the permissions assigned to a patron group:

1. On the Group Editor home page, click the **Edit** link for the group you want to modify. This displays the **General page** for the group.
2. Modify the settings as needed. For instructions, refer to the procedure in Creating a New Patron Group
3. When finished, click **OK** to save your changes.

Deleting a Patron Group

To delete a patron group from the Oasis system:

1. On the Group Editor home page, click the **Delete link** for the group you want to delete.
2. If the group has no members, a confirmation prompt appears. Click **Yes** to proceed with the deletion.

Note: *If members are assigned to the group, the message "You cannot delete a group that has members" appears.*

Warning: *This deletion cannot be undone.*

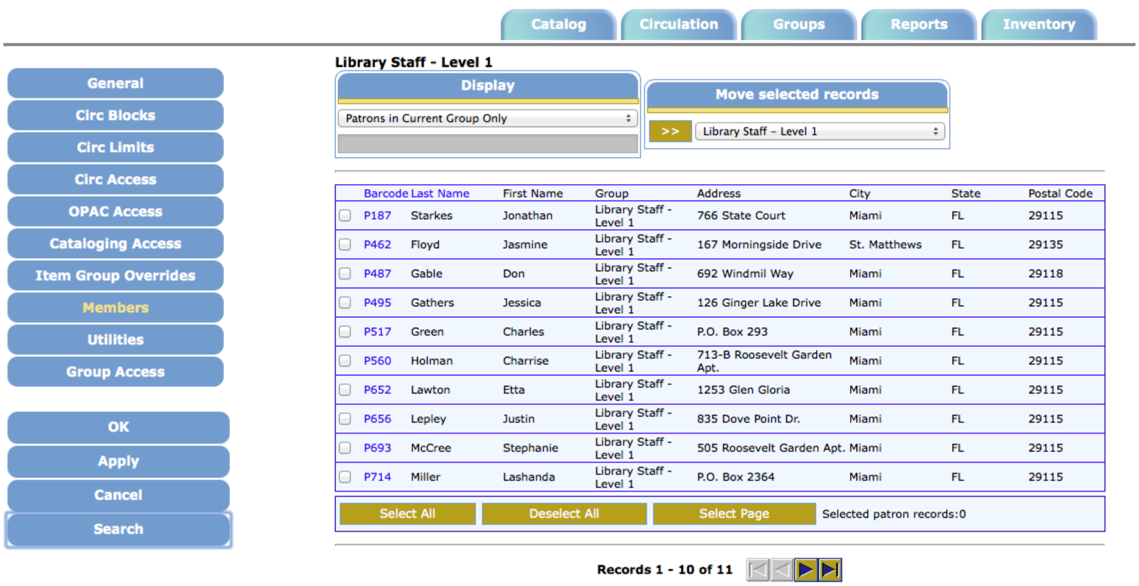
Working with Item Groups

***Note**: Item groups must be in the program before you can enter or import patron records into the Catalog. Some groups are installed with the program.*

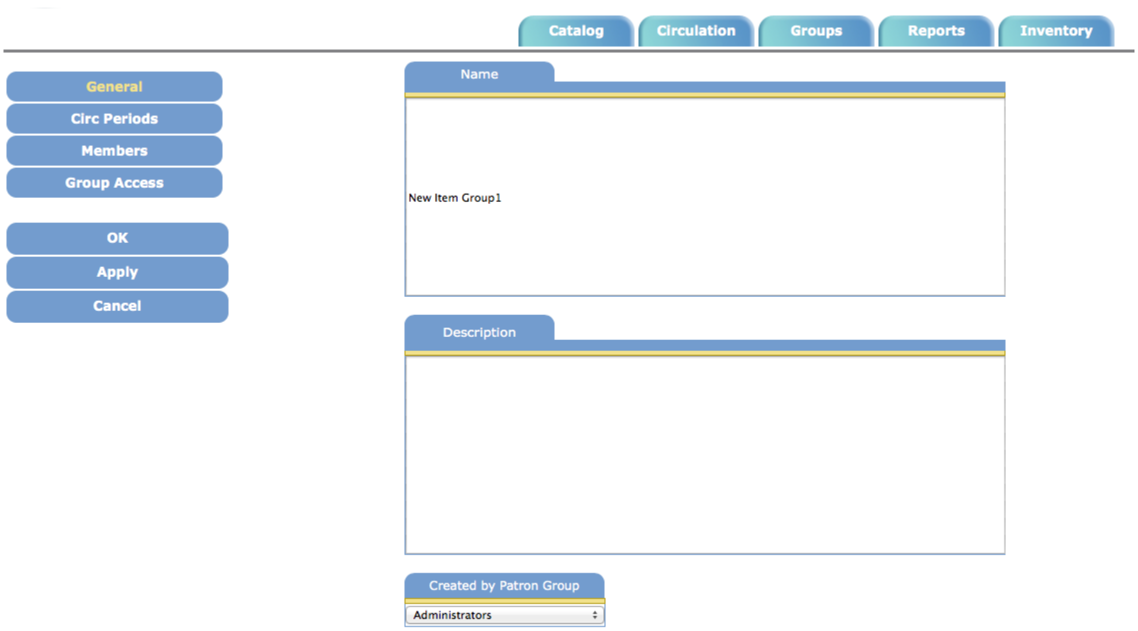
Creating a New Item Group

1. Select a Catalog database in the Database Set list.
2. In the **New** list, select **Item Group**, then click the >> button on the right. This creates a “New Item Group1” entry.

NOTE:*If the new entry does not appear, verify that* ***All Groups*** *or* ***Item Groups*** *is selected in the Display list.*



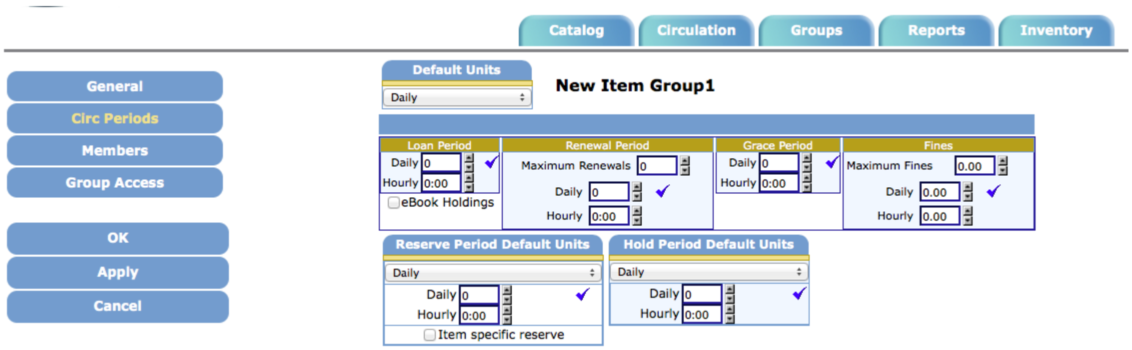
3. Click the **Edit** link to the right of the new group. This opens the General page for the new group. Proceed with the following sections to enter information for this group.



General. On this page, enter identification information for the group.

1. In the **Name** box, type the item group’s name.

2. In the **Description** box, type any information needed to describe this group. This will display on the main Group Editor page.
3. The **Created by Patron Group** box displays the patron group of the user that created this group. Only administrators can modify this entry.
4. Click **Apply** to save your entries on this page, then click Circ Periods in the side menu and proceed to the next section.



Circ Periods. On this page, establish circulation time frames and fine amounts for this item group.

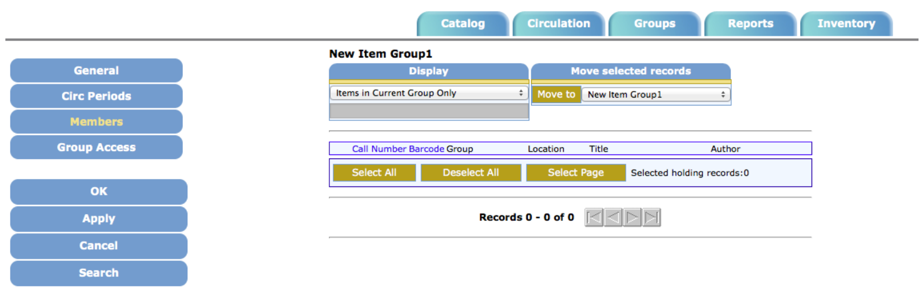
1. To enter different limits for this item group:

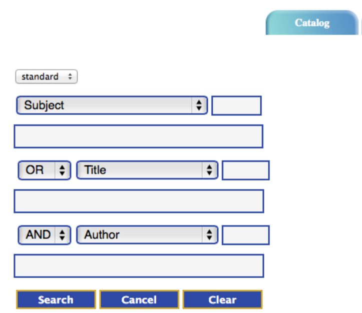
    - In the **Default Units** list, select **Daily** or **Hourly** as the default time unit for **Loan Period, Renewal Period, Grace Period**, and **Fines.**
    - In **Loan Period, Renewal Period, Grace Period**, and **Fines**, enter the time limit for each period type. Also, enter the following:
        - Under **Renewal Period,** enter the maximum number of renewals allowed.
        - Under **Fines**, enter the maximum fine amount.
    - In **Reserve** and **Hold Period Default Units**, enter the time for each of this features
        - **Reserve Period Default Units** are the number of days or hours that the reserve is valid. This number should be a large one, e.g. 200 days, to accommodate long lists of reserves for popular materials. When the reserve period ends, the reserve is cancelled.
        - **Hold Period Default Units** are the number of days or hours that the item is held in the library, waiting for the patron to pick it up. When the hold period ends, if the item has not been retrieved and loaned, the item moves to the hold of the next patron on the reserve list, or it returns to normal status and should be re-shelved.
        - A checkmark in the box for **Item Specific Reserve** indicates that reserves are placed on specific holding records rather than on titles. This is useful for items such as periodicals, where the specific issue is usually required, rather than any issue of that title.

    - Click **OK**. This returns you to the Item Group Overrides page.

2. Click **Apply** to save your entries on this page, then click Members in the side menu and proceed to the next section.

***Note**: The Maximum Fine amount is used by the program as the replacement cost if an item is damaged or lost and there is* *no price in the 852#9 of the holding record. Every library should enter an amount in this box, even if the library does not charge overdue fines.*





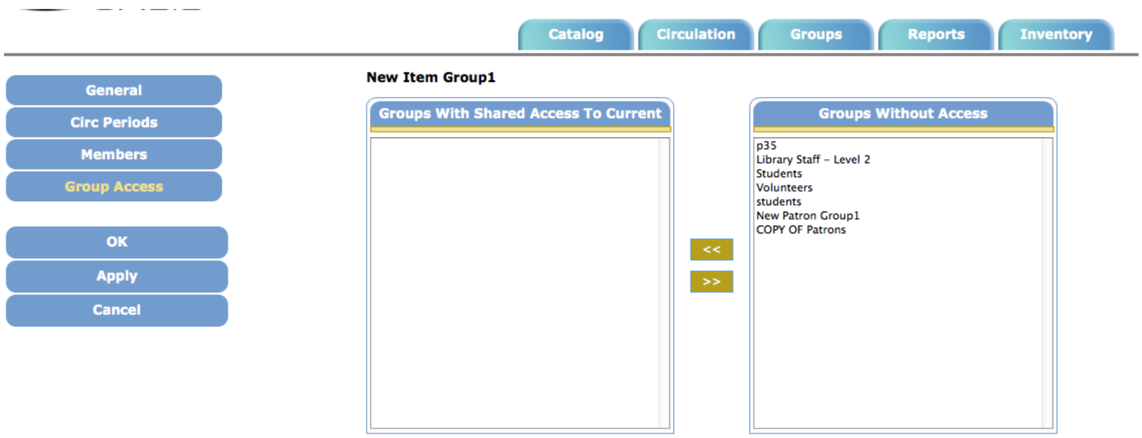
Members. On this page, add and remove item group members. Items assigned to this group adhere to the circulation parameters established in Circ Periods.

1. In the **Display list,** select All Items. This displays a list of all items, not just items currently assigned to this group.
2. Select the check box next to each item you want to add to the item group. To locate specific items:

   - On the side menu, click **Search.** This displays the Search page.
   - Type your search query into the appropriate boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator. Then click Search. This displays a list of items matching your search query.

3. Under **Move selected records,** the new group name displays. To move the selected items to this group, click the **>>** button on the left. This displays the new group with its assigned items.
4. Click **Apply** to save your entries on this page, then click Group Access in the side menu and proceed to the next section.

Tip: *You can also scan items into the group. To do so, select Scan Items into Current Group in the Display list. Then scan the item's barcode or type the barcode in the Barcode box.*



Group Access. On this page, specify which patron groups you want to have access to this group.

1. The Groups Without Access box displays the patron groups that do not have access to make changes to this group. To change the group access, click the patron group that you want to have access to this item group, then click the **<<** button. This moves the patron group to the Groups With Shared Access To Current box. Repeat this for all groups that you want to have access to this item group.
2. Click **OK** to save your entries on this page and return to the Group Editor home page.

Modifying Item Group Permissions

To modify the permissions assigned to an item group:

1. On the Group Editor home page, click the **Edit** link for the group you want to modify. This displays the General page for the group.
2. Modify the settings as needed. For instructions, refer to the procedure in Creating a New Item Group.
3. When finished, click **OK** to save your changes.

Deleting an Item Group

To delete an item group from the Oasis system:

1. On the Group Editor home page, click the Delete link for the group you want to delete.

2. If the group has no members, a confirmation prompt appears. Click Yes to proceed with the deletion.

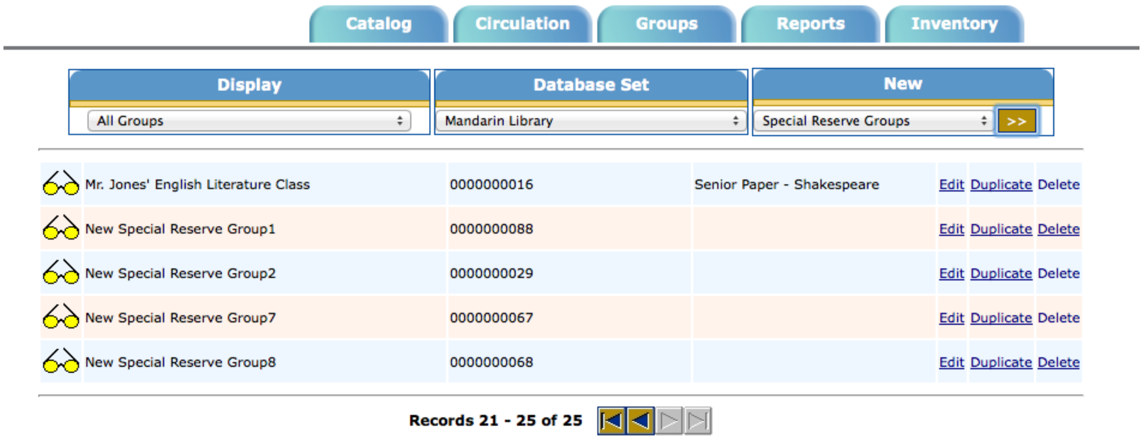
Note: *If members are assigned to the group, the message "You cannot delete a group that has members" appears.*

Warning: *This deletion cannot be undone.*

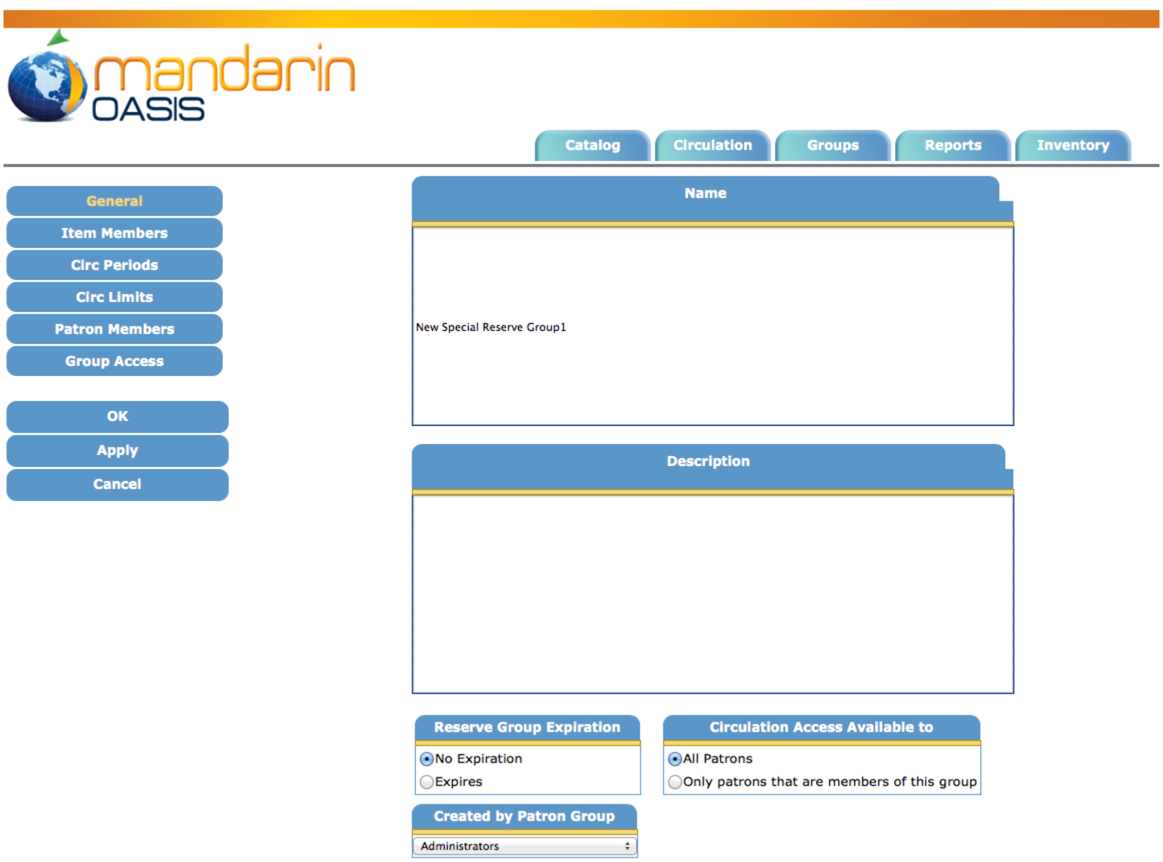
Working with Special Reserve Groups

Creating a New Special Reserve Group

1. Select a Catalog database in the **Database Set** list.
2. In the **New list**, select **Special Reserve Group**, then click the >> button on the right. This creates a “New Special Reserve Group1” entry.



3. Click the **Edit** link to the right of the new group. This opens the General page for the new group. Proceed with the following sections to enter information for this group.



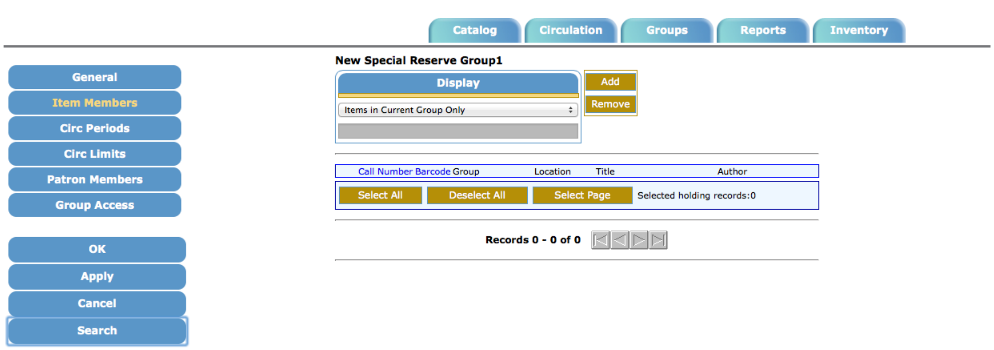
General. On this page, enter identification information for the group as well as information that impacts circulation behavior.

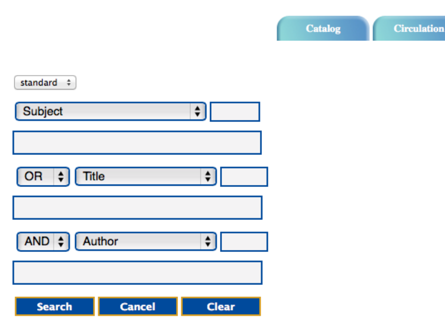
1. In the **Name** box, type the special reserve group's name.
2. In the **Description** box, type any information needed to describe this group. This will display on the main Group Editor page.
3. Under **Reserve Group Expiration**:
    - If the group has no planned expiration date, click **No Expiration.**
    - If an expiration date is known, click **Expires**, and then type or select a date in the adjacent box. To select a date, click the **Calendar arrow** to display a calendar. Click the calendar's left (<) and right (>) arrows to select a month, then click the desired date. The date appears in the **Expires box.**

***Note**: On the Expires date the settings for the items and/or patrons of this Special Reserve Group revert to the settings of the standard group (991#a) for each item and/or patron. The Special Reserve Group settings can be made active again by changing the Expires date to the future.*

4. The **Created by Patron Group** box displays the patron group of the user that created this group. Only administrators can modify this entry.
5. Under **Circulation Access Available to**:
    - Click **All Patrons** if you want all patrons to have access to items included in this special reserve group.
    - Click **Only patrons that are members of this group** if you want to restrict access to items in this special reserve group.

6. Click **Apply** to save your entries on this page, then click Item Members in the side menu and proceed to the next section.





Item Members. On this page, add and remove item group members. Items assigned to this group adhere to the circulation parameters you establish in the next section, Circ Periods.

1. In the **Display** list, select **All Items**. This displays a list of all items, not just items currently assigned to this group.

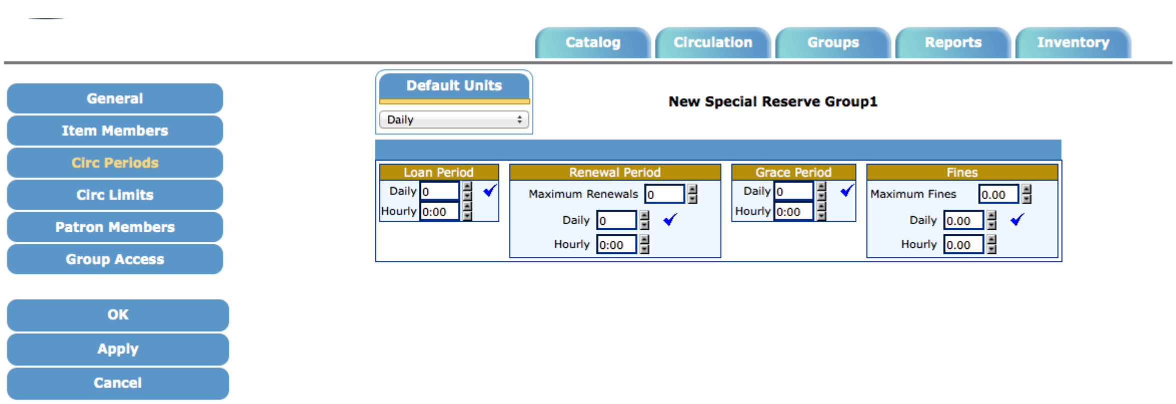
Tip: *You can also scan items into the group. To do so, select **Scan Items into Current Group** in the **Display** list. Then scan the item's barcode or type the barcode in the Barcode box.*
Scanning items is usually the easiest method to get items into a Special Group.

2. Select the check box next to each item you want to add to the special reserve group. To locate specific items:

- On the side menu, click Search. This displays the Search page.
- Type your search query into the appropriate boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator. Then click Search. This displays a list of items matching your search query.

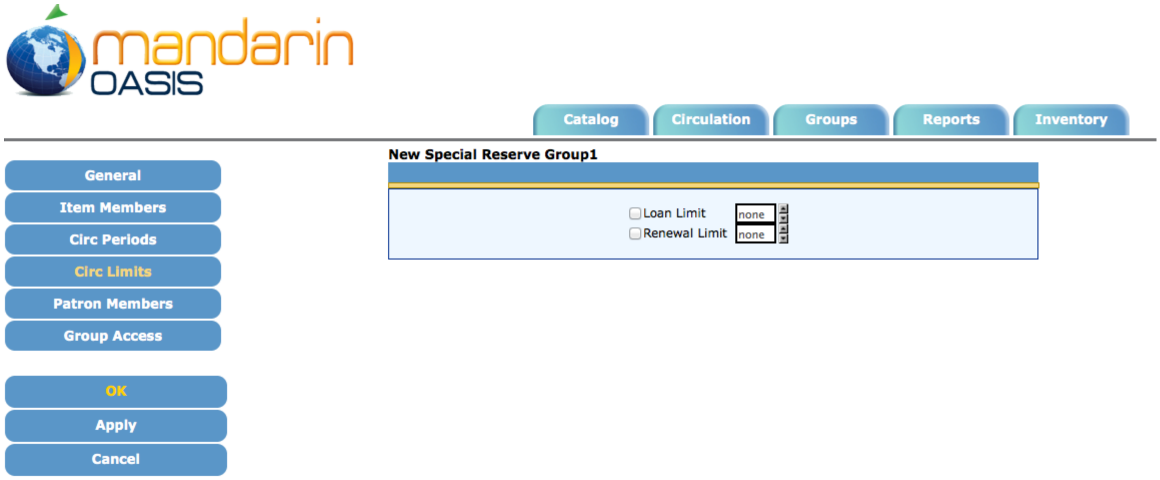
3. When all desired items are selected, click Add. This displays the new group with its assigned items.
4. Click Apply to save your entries on this page, then click Circ Periods in the side menu and proceed to the next section.

Tip: *Click Select All at the bottom of the list to select all items listed.*



Circ Periods. On this page, establish circulation time frames and fine amounts for this special reserve group.

1. Enter circulation time frames and fine amounts for this special reserve group. See steps 3 and 4. in Item Group Overrides at **Creating a New Patron Group.**
2. Click **Apply** to save your entries on this page, then click **Circ Limits** in the side menu and proceed to the next section.

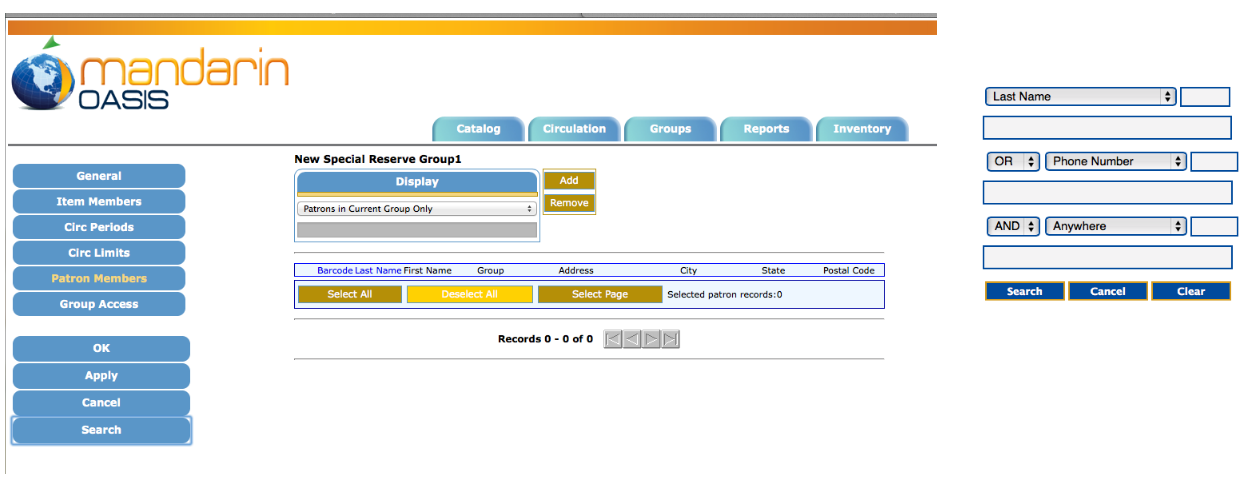


Circ Limits. On this page, customize the circulation quantity limits for the special reserve group. Specify the maximum number of items for each type of transaction listed.

1. Select a circulation limit for each limit type. To do so:

  - Select the check box next to the desired limit type. If a limit is not selected, no limit is assigned.
  - In the list next to the limit type, select a limit amount.

2. Click **Apply** to save your entries on this page, then click **Patron Members** in the side menu and proceed to the next section.



Patron Members. On this page, add and remove patron members.

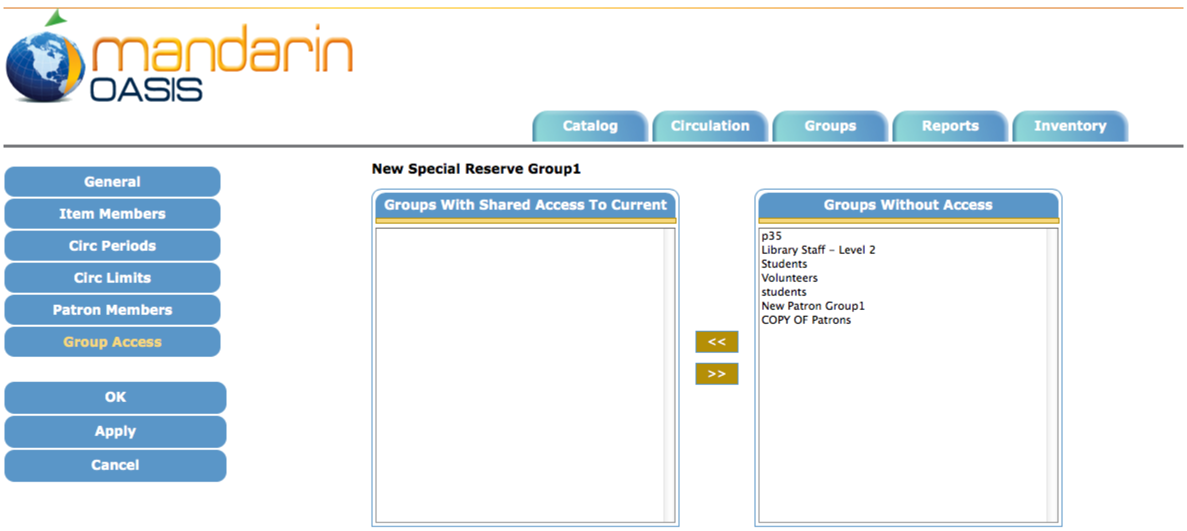
1. In the **Display list**, select All Patrons. This displays a list of all patrons, not just patrons currently assigned to this group.
2. Select each patron you want to add to the **special reserve group**. To locate specific patrons:

    - On the side menu, click **Search.** This displays the Search page.
    - Type your search query into the appropriate boxes. To select a different MARC field or Boolean operator, click the **arrow** next to the appropriate list, and then select the preferred field or operator. Then click **Search.** This displays a list of patrons matching your search query.

3. When all desired patrons are selected, click **Add.** This displays the new group with its assigned patrons.
4. Click **Apply** to save your entries on this page, then click Group Access in the side menu and proceed to the next section.

Tip: *You can also scan patrons into the group. To do so, select Scan Patrons into Current Group in the Display list. Then scan the patron's barcode or type the barcode in the Barcode box.*

Tip: *Click Select All at the bottom of the list to select all patrons listed.*



Group Access. On this page, specify which patron groups you want to have access to this group.

1. The **Groups Without Access** box displays the patron groups that do not have access to make changes to this group. To make change the group access, click the **patron group** that you want to have access to this special reserve group, then click the << button. This moves the patron group to the **Groups With Shared Access** To Current box. Repeat this for all groups that you want to have access to this special reserve group.
2. Click **OK** to save your entries on this page and return to the Group Editor home page.

Modifying Special Reserve Groups

To modify the permissions assigned to a special reserve group:

1. On the Group Editor home page, click the **Edit** link for the group you want to modify. This displays the General page for the group.
2. Modify the settings as needed. For instructions, refer to the procedure in Creating a New Special Reserve Group.
3. When finished, click **OK** to save your changes.

Deleting a Special Reserve Group

To delete a special reserve group from the Oasis system:

1. On the Group Editor home page, click the **Delete** link for the group you want to delete.

2. If the group has no members, a confirmation prompt appears. Click **Yes** to proceed with the deletion.

Note: *You cannot delete a special reserve group if members are assigned to the group.*

Warning: *This deletion cannot be undone.*

Using the OPAC

This chapter describes:

• The features of the OPAC
• How to search the OPAC
• How to work with search results
• How to use My Bookbag and My Account

***Note**: Some features described in this chapter may have been disabled by your system administrator, or you may not have permission to access them.*

OPAC Overview

The OPAC allows patrons to search your library collection from any computer with a Web browser. The OPAC offers three different search methods:

- **Standard Search** – A basic keyword search method that allows the patron to select an index to be searched. This method recognizes Boolean logic, truncation, and phrase searches.

- **Enhanced Search** – A more advanced search method that offers search flexibility and options. Patrons can enter simple or complex queries, search by material type, and use index browsing.

- **Visual Search** – An easy point-and-click graphical search method. Patrons click visually descriptive graphics to narrow their searches from broad topics to more defined sub-topics, ultimately reaching search results.

The following features enhance the search session:

- **The Bookbag** allows a patron to set aside selected records throughout the course of the search session. These records can then be saved, printed, or e-mailed.

- **Authority Control** users can view "**See**" and "**See Also**" references if there are more appropriate headings used by the library than the one searched for, or if there are other headings related to the search that may also be useful.

Note: Authority Control is an optional module that may not be installed on your system.

- The **Shelf Browse** function quickly locates records with a call number similar to that of a selected record. This is equivalent to looking at items to the left or right of a specific item on a library shelf.

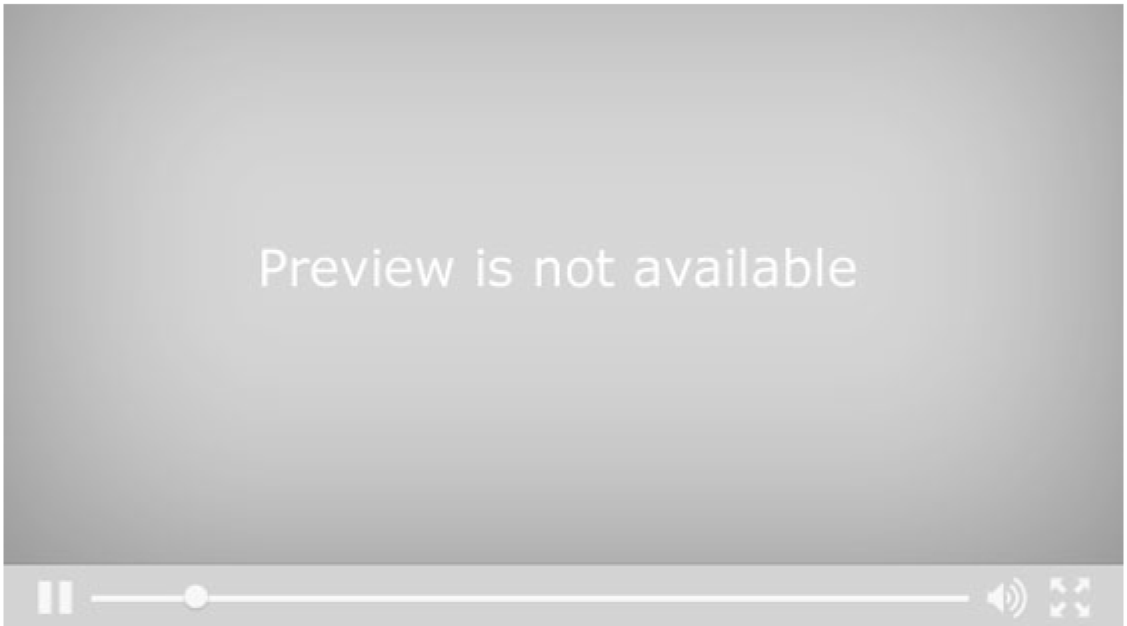
- The **Index Browser** can be invoked when conducting an Enhanced Search if a patron wants to browse the list of valid search terms.

- An **Interlibrary Loan (ILL)** request system allows authorized users at cooperating libraries to e-mail loan requests.

- The **Reset feature** returns the user to the default search page. If the user was signed in, he or she will be automatically signed out.

- The **Bulletin Board** is the four or five images at the top of the OPAC page that link to Web pages or files that the library wants patrons to view.

- The **Comments/Ratings** feature allows patrons to rate items on a scale of one to five, and/or to submit reviews or other comments about specific items.

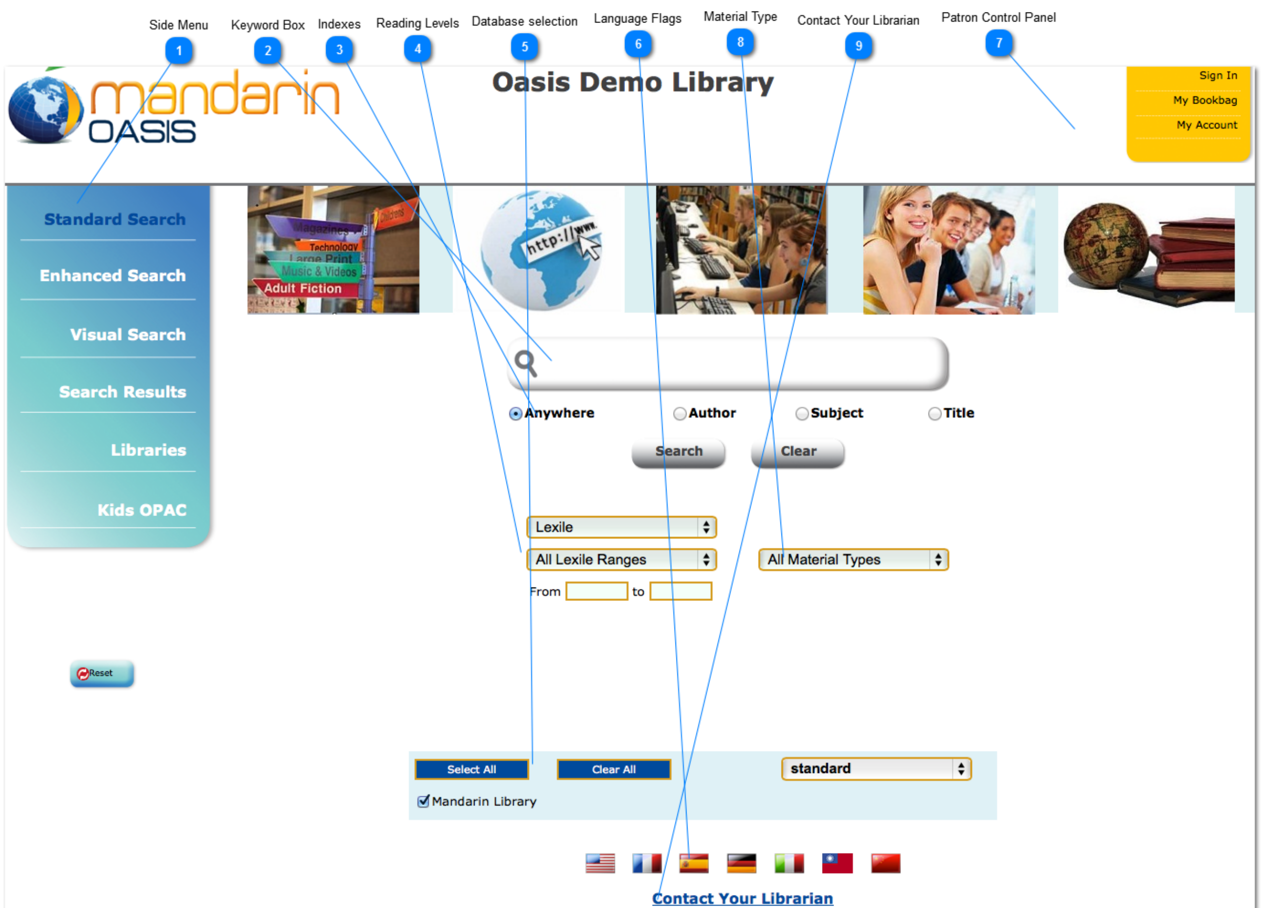


Getting Started

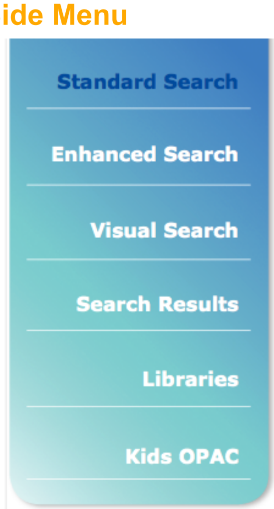
Patrons can launch your library's OPAC by entering the Web address in their browser's address bar, clicking a link or entering a search in a **Quick Search** box on your library's Web site, or using a desktop shortcut on a library workstation.

Catalog Features

When a patron launches the OPAC, the default search appears. Some features may have been modified or disabled by your system administrator.



1 Side Menu

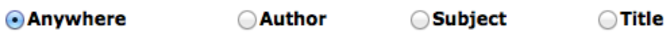


Contains links for several Catalog functions.

2 Keyword Box

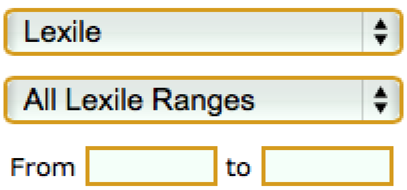
Allows you to type one or more keywords for which to search.

3 Indexes



Allow you to specify the index you want to search.

4 Reading Levels



Allow you to select Lexile, Fountas & Pinnell or Accelerated Reader reading Levels

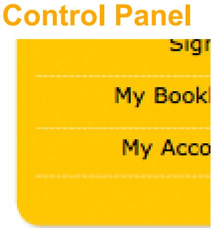
5 Database selection

Allows you to choose which databases you want to search (if additional databases are available; these are configured by the system administrator). If this feature is not visible on your main Catalog page, it can be accessed by clicking on the Libraries link in the side menu.

6 Language Flags

Allow you to select a different language for the Catalog display. This does not affect the language of the information in the database records. The available languages may have been changed by a system administrator.

7 Patron Control Panel

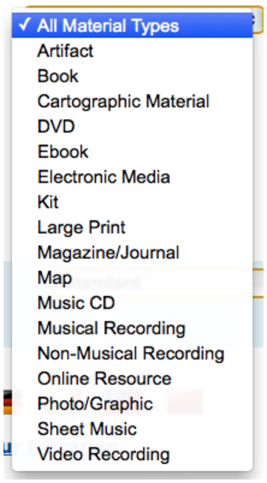


Allows you to ***Sign In*** to Other options, to your ***Bookbag*** or your ***Account***

Material Type

8

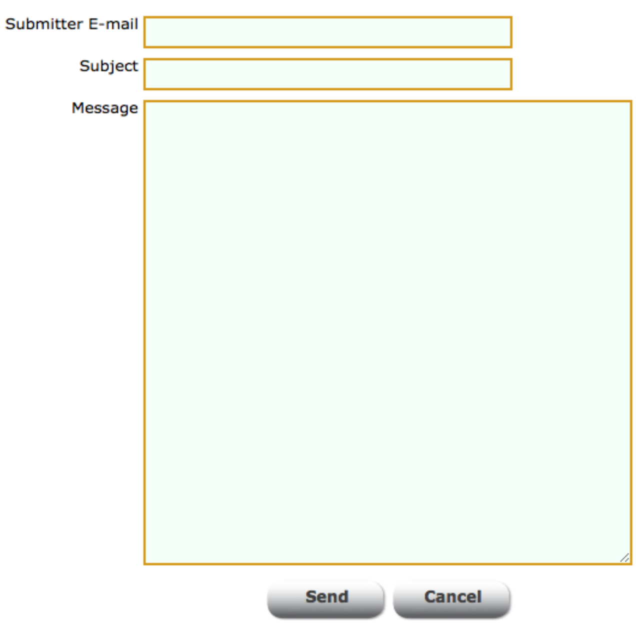
Limit your search by selecting a material type (such as **Book** or **DVD**) in the **Material Types** list, if desired.



Contact Your Librarian

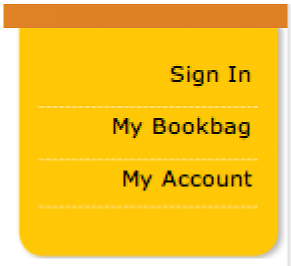
9

An easy way to e-mail your librarian. Click the link and the email template displays



Signing in to the OPAC

In order to perform tasks that require the OPAC to identify you (such as accessing your saved Bookbag, using **My Account,** or reserving items), you must
sign in. To do so:



1. Click the ***Sign In*** link that appears on the right side of most pages in the OPAC.
2. Type your login name or patron barcode in the Login Name/Barcode box.
3. In the Password box, type your password.
4. Click Sign In.

Note: *When finished with your session, click Sign Out or Reset to ensure your privacy.*

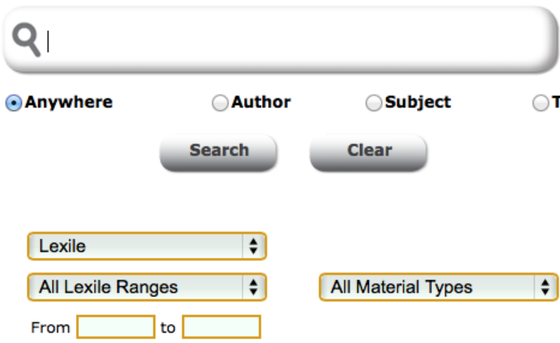
Note: *Some features require patrons to have access privileges, which are granted in the OPAC Access tab of the Group Editor.*

Searching the OPAC

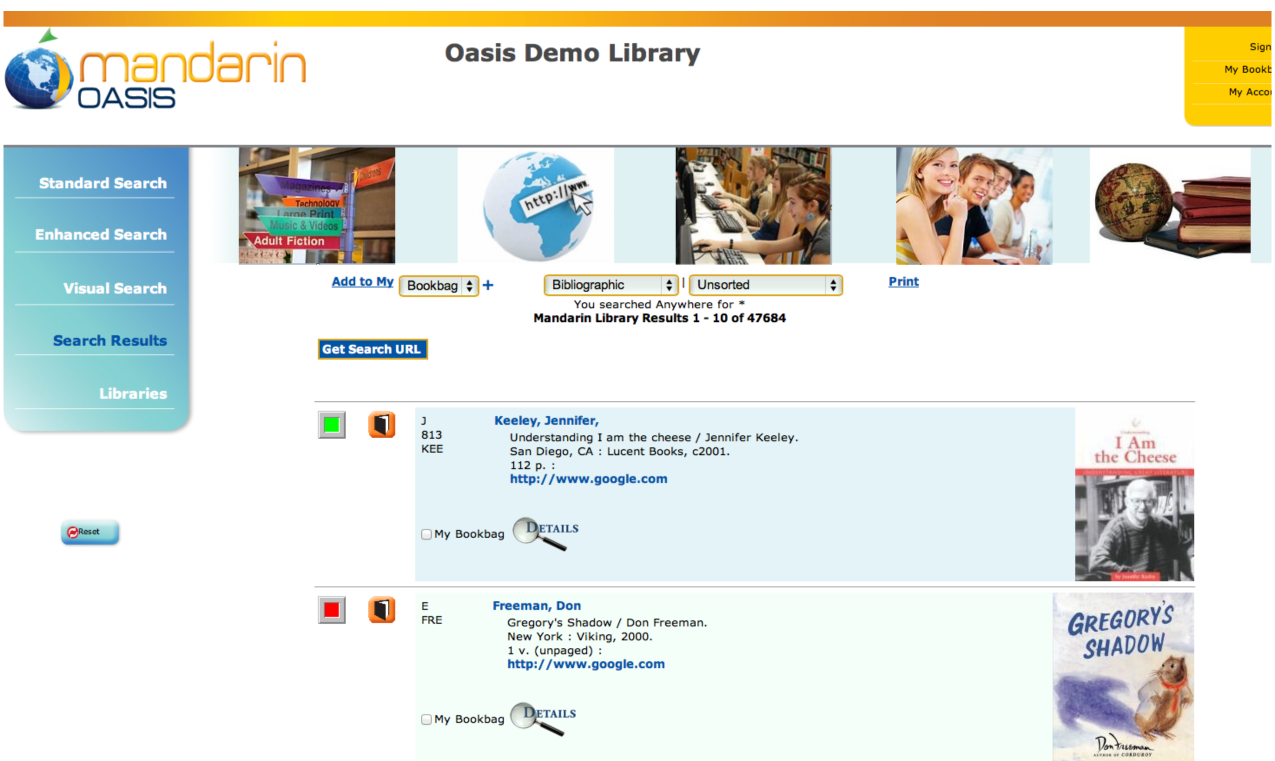
The OPAC offers three different search methods: Standard, Enhanced, and Visual. These are described in the following sections.

Standard Search

1. If Standard Search is not already active, click the **Standard Search** link. This displays the Standard Search page.
2. Type one or more keywords in the keyword box.
3. Below the keyword box, select an index to search in (such as **Title** or **Author**).

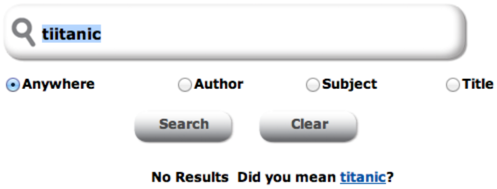


4. Limit your search by selecting a material type (such as **Book** or **DVD**) in the Material Types list, if desired or by selecting Lexile, Fountas & Pinnell or Accelerated Reader Reading Levels.
4. Click **Search**. The **Results page** displays the list of search results. See The Results Page for more information.



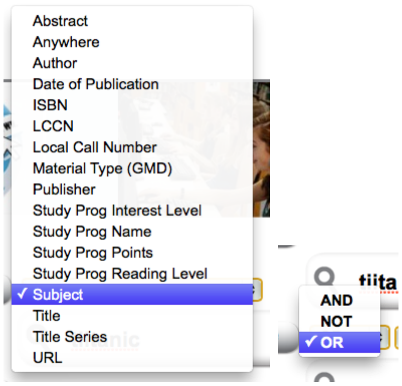
Note: *Your system administrator may have disabled some of the options shown here.*

Note: *If no matches are found, the result may display "**Did you mean xxxxx**?*



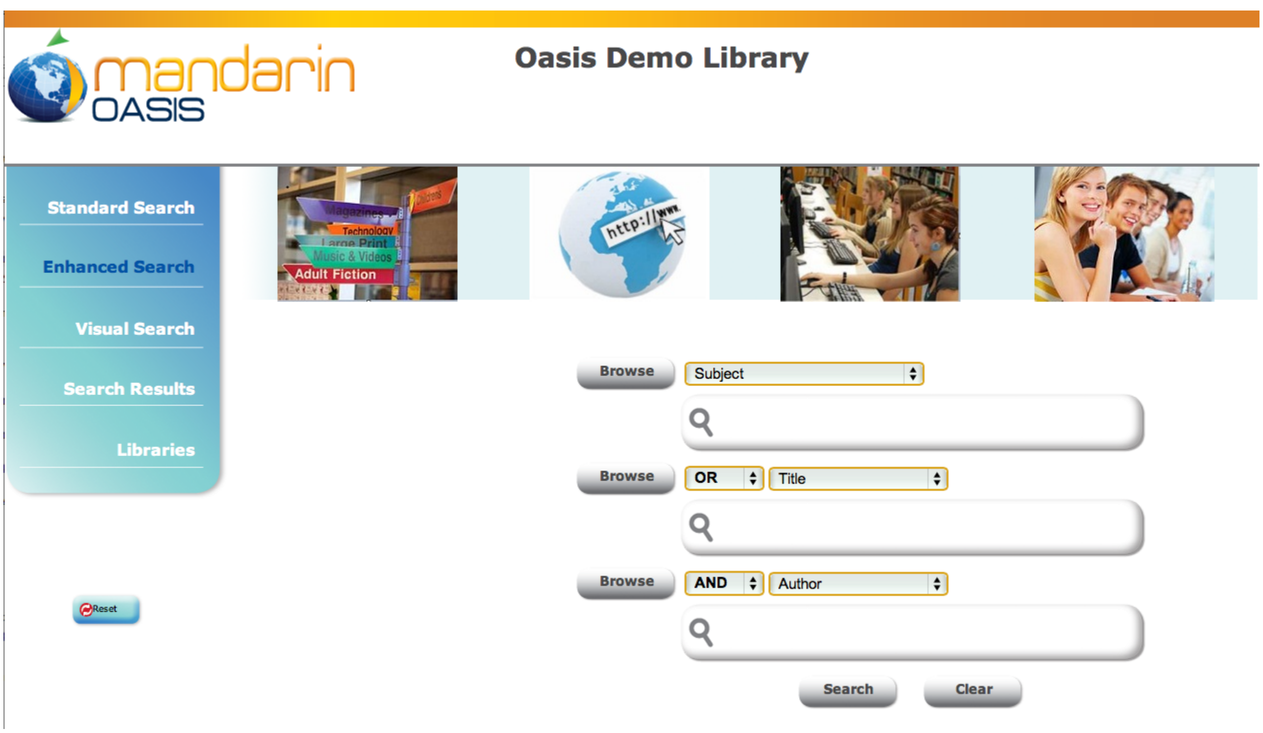
Enhanced Search

1. If Enhanced Search is not already active, click the Enhanced Search link. This displays the **Enhanced Search** page.
2. Type your search query into one or more of the three keyword boxes. To use different indexes or Boolean operators, select a different index or operator in the appropriate list.



***NOTE**: You can also click a **Browse** button and select a search term. For instructions, see [Using Index Browse](#).*

3. Limit your search by selecting a material type (such as **Book** or **DVD**) in the [Material Types](#) list, if desired or by selecting Lexile, Fountas & Pinnell or Accelerated Reader [Reading Levels](#).
4. Click **Search**. The **Results page** displays the list of search results. See [The Results Page](#) for more information.



***Note**: Your system administrator may have disabled some of the options shown here.*

Search Tips

- You can apply the truncation asterisk (*) to the beginning and/or end of a keyword; the wildcard question mark (?) character within a keyword (wom?n); and quotation marks (“ ”) around a phrase.

- You can use AND, OR, and NOT to connect keywords in a keyword box. Be sure to type these in capital letters.

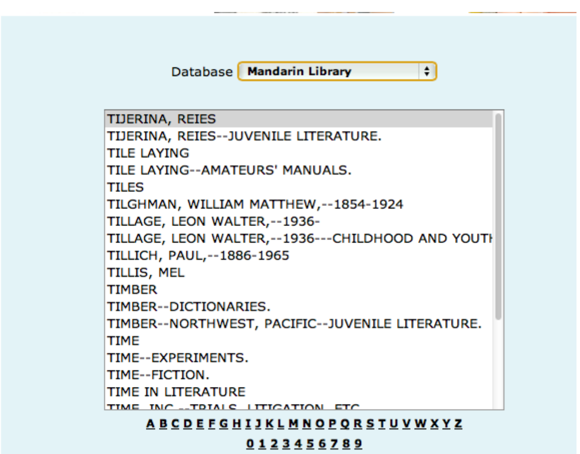
Using Index Browse

Many MARC fields in the Oasis system have been indexed, enabling patrons to review and select search terms from existing data using Index Browse. This is particularly useful to patrons who are unsure of the search they want to enter.

To use Index Browse:

- If Enhanced Search is not already active, click the Enhanced Search link. This displays the Enhanced Search page.

- In the first index list, select an index to search in (such as Title or Author). Then click the Browse button to the left, or enter a search term and then click Browse. This displays the indexed entries, either from the beginning of the list or at the closest alphabetical match to your search term.

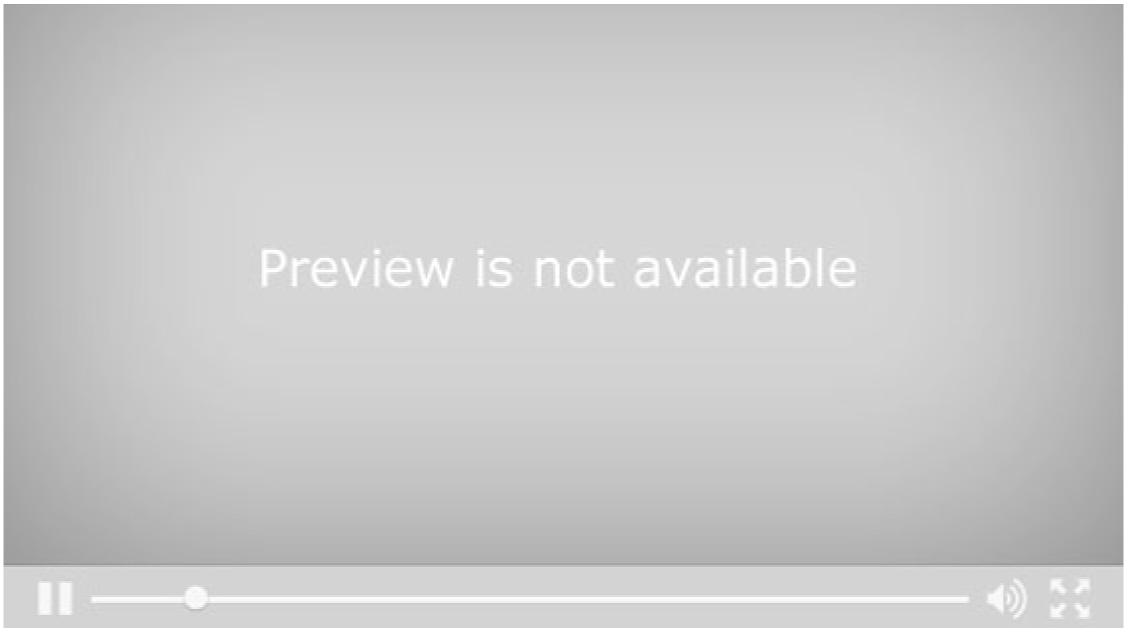


***NOTE**: If the MARC field has not been indexed and therefore cannot be browsed, the corresponding Browse button is not available.*

- Navigate through the list to locate an entry to use as a search term. To browse for a specific entry, type a term in the keyword box at the bottom of the **page** and click **Browse**; the list moves to the closest alphabetical match. When the desired entry is located, click Copy. This returns you to the Enhanced Search page and places the selected term in the keyword box.

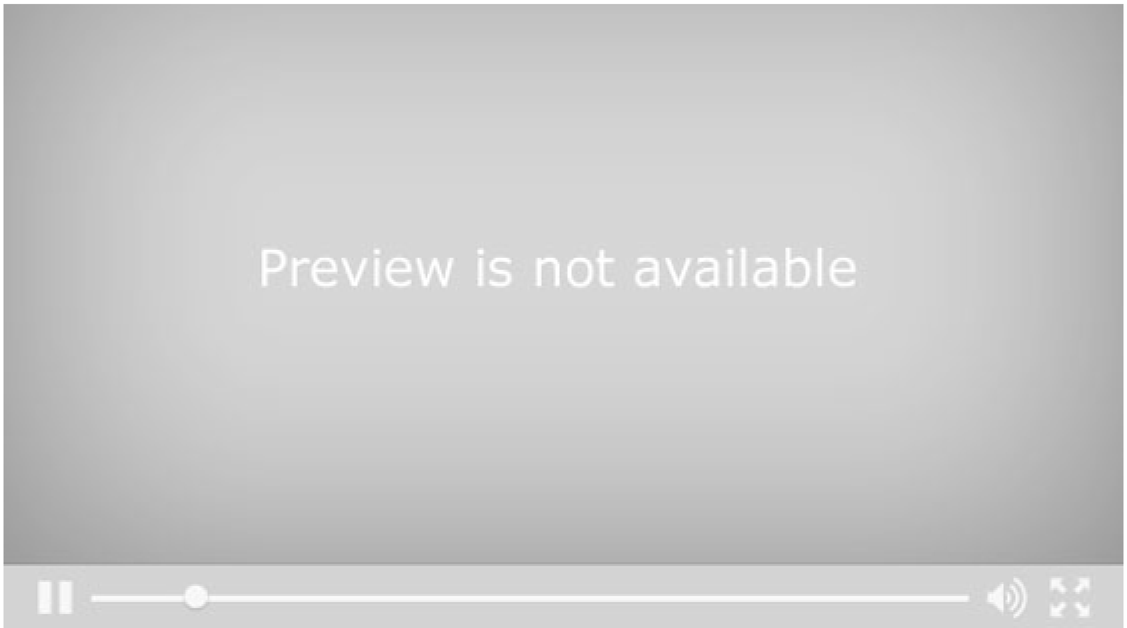
- Enter other search terms in the remaining keyword boxes, if desired. When finished, click Search. The Results page displays the list of search results. See The Results Page for more information.

Using the Reading Level Filter



A big change is obvious here in the search area with the addition of the ability to search by lexile or Fountas and Pinnell range. Many school librarians have requested this. We know that it is important for you to help students find materials at the appropriate reading level, and you can do this here, whichever guided reading level your school uses. You can search by simple 100 range, or by a custom range. I'm going to search for books about bears in the reading level between lexiles 440 and 620, and my search brings up 13 items, with the lexile information displaying. Of course this information has to be in your records to be searchable and displayable, and if you are needing to add this to your records, let us know and we can help with that. For those of you in public, academic or special libraries that do not need this kind of information, there is the ability to turn off this search so that it does not display.

Using the Material Type Filter



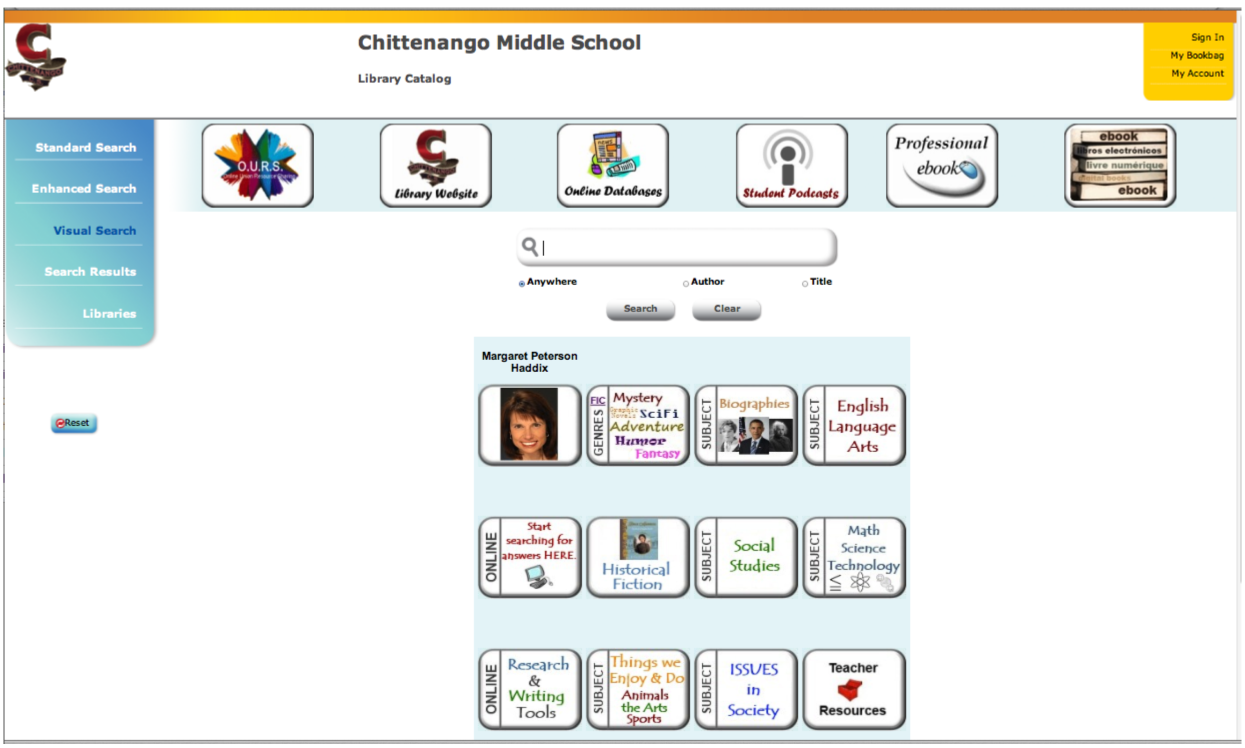
The materials type filter has been added to the standard search in addition to the enhanced search. Of course you know that you can customize this list for the kinds of materials you have in your library, deleting items you know you don't have, or changing the names, or even adding special collections or other subsets of your collection.

Visual Search

The Visual Search method provides patrons with an easy point-and-click graphical search method. From a patron's perspective, a search consists of clicking a topic component and then clicking a related sub-topic component; this generates a list of search results. In actuality, it is a keyword search method disguised behind a graphical interface - topic components are connected to query components, which are linked to predefined search queries. A query component launches a search of the selected database and returns a list of results.

These graphical components can also be configured as link components, which launch external Web pages instead of search queries. Link components are optional and are not included in the default interface.

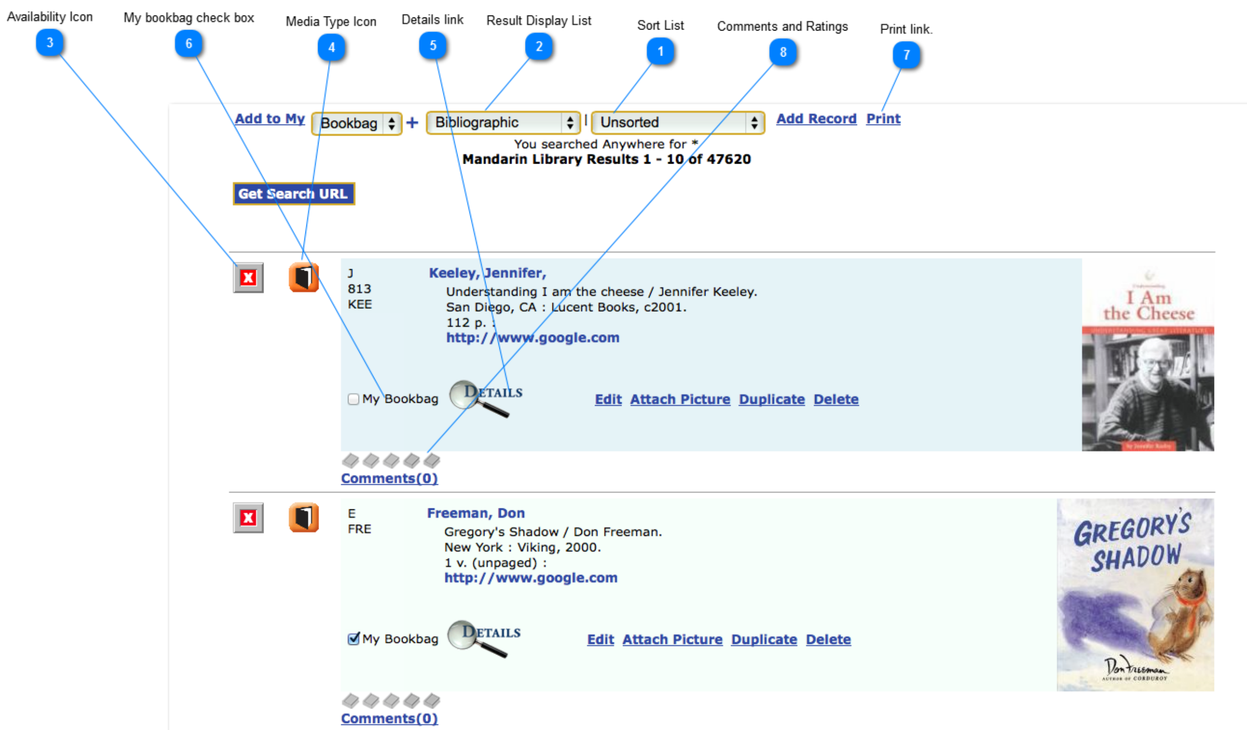
1. If Visual Search is not already active, click the **Visual Search** link. This displays the Visual Search page, which contains a menu of topics.
2. Click a topic. This either opens a sub-menu page or launches an external Web page.
3. If a sub-menu page appears, continue clicking the desired topics (narrowing the search) until you reach the last menu level. This launches a search query and displays the search results on the Results page. (If you click a link component, it will launch a Web page instead of a search query.)



***Tip**: Topic, query, and link components look the same.*
The result of selecting them is what makes them different.
- *A topic component opens a sub-menu.*
- *A query component returns search results.*
- *A link component opens a Web page.*

The Results Page

Once a search query is sent, the Results page appears listing all the records matching the query.



Returning to the Search Page

To return to a blank search page, click one of the **Search** links at the top of the side menu (Standard Search, Enhanced Search, or Visual Search). You may need to click **Clear** to delete previous search terms.

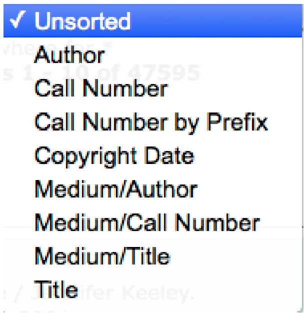
1

Sort List

Sorting the Record List

To sort the records displayed by a different sort formula, select a sort order in the Sort list.

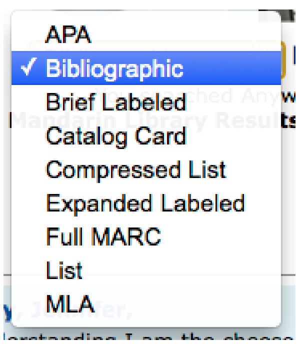
Note: *This list may have been modified by your system administrator.*



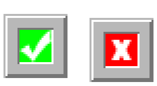
2 Result Display List

Changing the Display Format
To select a different format for the records displayed, select a display format in the Results Display list.

Note: *This list may have been modified by your system administrator.*



3 Availability Icon



Determining Availability
To determine an item's availability, refer to the color of the square or star-shaped icon next to the record. Green with a check mark signifies available and red with a mark signifies unavailable. A blue box indicates an item available electronically.

If you are searching at a library with multiple sites, a star-shaped icon indicates that the item can be found at the local site; records located at other sites will have a square icon. At a single-site library, the icon will always be a square.

4 Media Type Icon

To identify the media type for a record, refer to Table below. (Media type icons also appear on the Details and My Bookbag pages.)

	Artifacts		Floppy Disk
	Book		Journal
	Camera		Kit
	Cassette		Map
	CD Data		Microphone
	DVD Audio		Music
	DVD Rom		Playaway
	DVD Video		Sheet Music
	Ebook		Video
	Film		WWW

5 **Details link**

Viewing Record Details

To view more information about a specific record, click the Details link. This opens the Details page containing the expanded bibliographic record and item location information. See The Details Page for more information.

6 **My bookbag check box**

☐ My Bookbag

Adding Records to the Bookbag

To add specific records to the Bookbag for later viewing, printing, or e-mailing, select the corresponding My Bookbag check box for each item. To add all the items on a Results Page to a Bookbag, click on the **Add to My Bookbag** link at the top of the page. To view the contents of the Bookbag, click the My Bookbag link in the side menu. For more information on the Bookbag, see Using the Bookbag.

7 **Print link.**

Print

Printing Search Results
To print the Results page, click the Print link. On the page that displays, click Print.

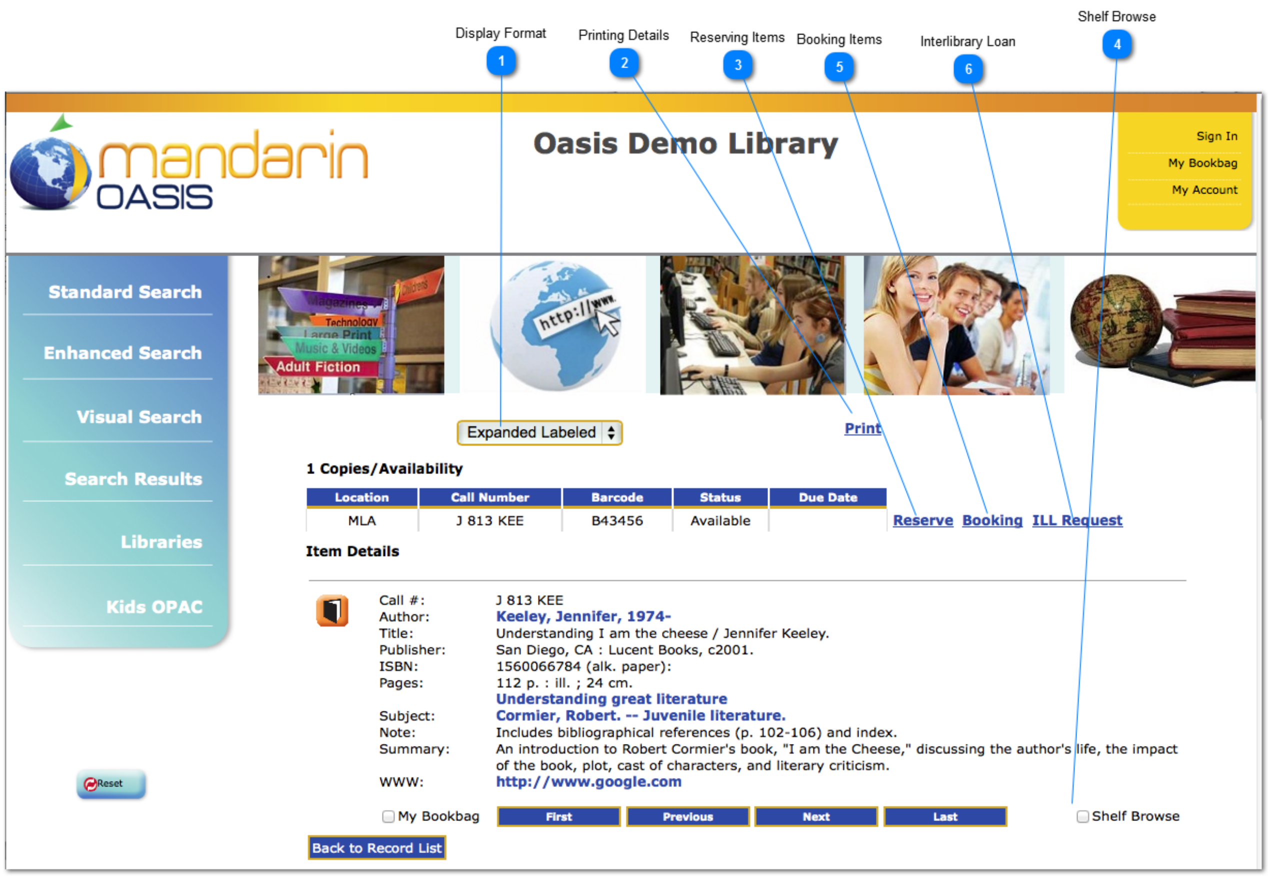
8 **Comments and Ratings**

[*See How to video: Comments and Rating*]

The Details Page

The Details page provides item details as well as information on the number of and availability of copies.

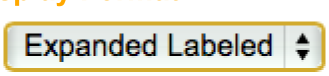
The Details page is accessed from the Results page by clicking the desired item's **Details** link. The options available on the Details page are described in the following sections; these options may have been modified by your system administrator.



Returning to the Record List

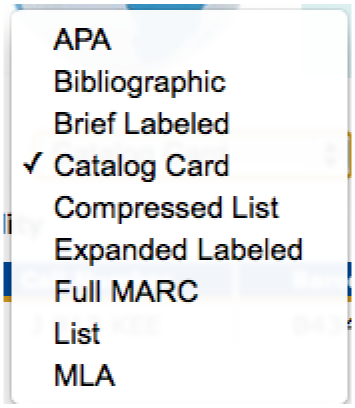
To return to the Results page, click the **Back to Record List** button or **Search Results** in the left-side menu list

1 Display Format



Changing the Display Format

To select a different format for the records displayed, select a display format in the Results Display list.



2 Printing Details

Print

To print the Details page, click the **Print** link. In the Print dialog box, change settings if desired, then click **Print**

3 Reserving Items

Reserve

You must be signed in to the OPAC and have the proper permission in order to reserve items; for instructions on signing in, see Signing in to the OPAC.

1. Under Copies/Availability, click **Reserve**. (If multiple copies are available, click the **Reserve** button that corresponds to the desired copy.)
2. On the confirmation page, click OK.

4 Shelf Browse

☐ Shelf Browse

Shelf Browse allows a patron to find records with call numbers similar to that of the displayed record. This is similar to looking at items to the left or right of a selected copy on a library shelf.

1. Select the Shelf Browse check box below the record.
2. After the page refreshes, you can click Previous or Next to move backward or forward in shelflist order.

5 Booking Items

Booking

You must be signed in to the OPAC and have the proper permission in order to book items; for instructions on signing in, see **Signing in to the OPAC**.

1. Under Copies/Availability, click **Booking**. (If multiple items are available, click the **Booking** button that corresponds to the desired item.) This displays the Booking page.
2. Enter the **start** and **end** date of the booking period in the boxes, and then click **Submit**.
3. On the confirmation page, click **OK**.

Interlibrary Loan

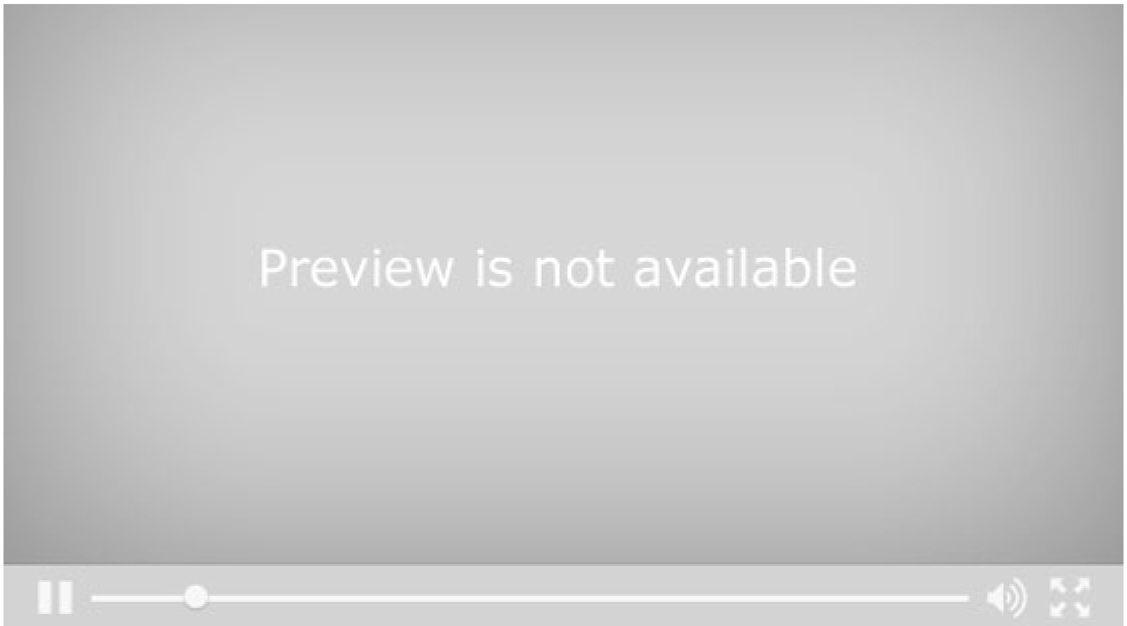
ILL Request

If the desired item is held at another location, you can submit a loan request to that location. You must be signed in to the OPAC and have the proper permission in order to request an ILL; for instructions on signing in, see Signing in to the OPAC.

1. Under Copies/Availability, click **Request ILL**. (If multiple copies are available, click the **Request ILL** button that corresponds to the desired copy.) This displays the ILL Request page.
2. In the Lending Library box, the library that has the copy appears.
3. In the Requesting Library box, your library location appears.
4. In the Submitter Name box, type your name.
5. In the Submitter E-mail box, your e-mail address should display (if there is an e-mail address in your patron record). If not, type your e-mail address.
6. In the Need by Date boxes, enter the date you would like to receive the item by.
7. In the Item Information section, verify that the correct item is listed.
8. If you have additional information to send to the requesting library regarding your request, type it in the Comments box.
9. If you would like to send a “carbon copy” of this e-mail request to an e-mail address, type the address in the CC box.
10. Click **Submit**. On the confirmation page, click **OK**.

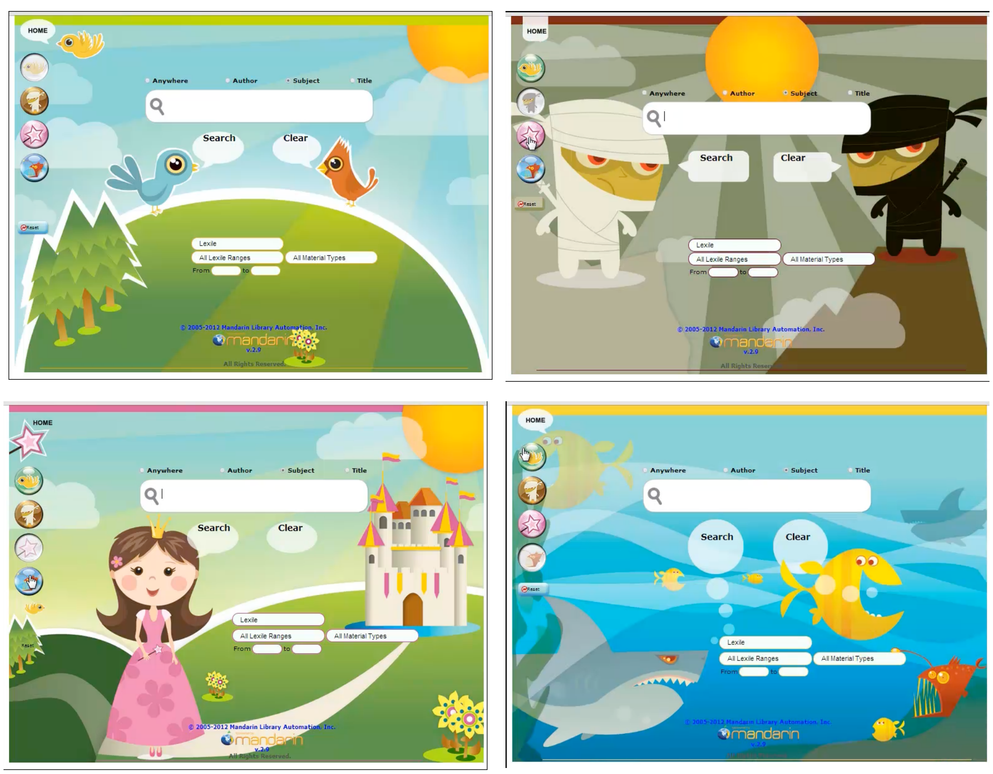
Kids OPAC

Kids OPAC makes it fun for young readers to search a library's collection! Children can choose from four themes by toggling among them.



Overview

The new Kidís catalog has four different choices of backgrounds, the happy birds, the sneaky ninjas, a lovely princess and her castle, and all kinds of friendly and scary fish.

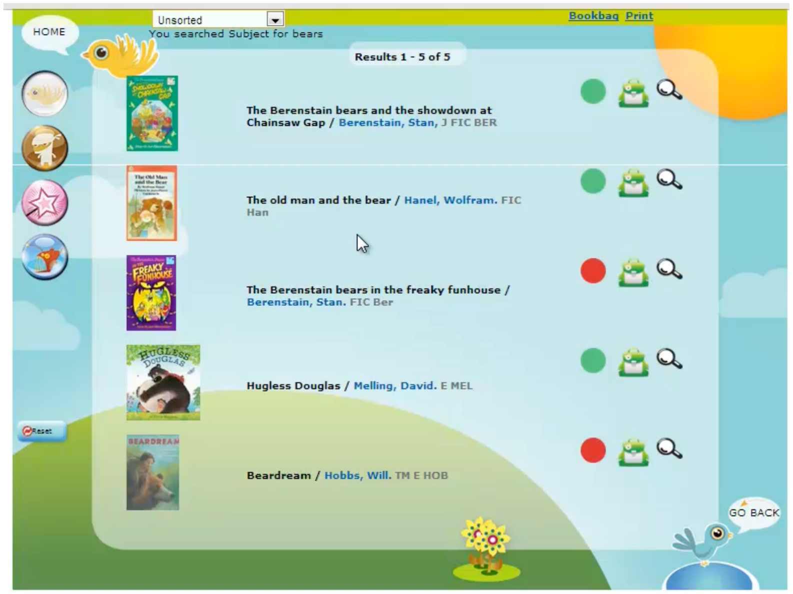


How to use it

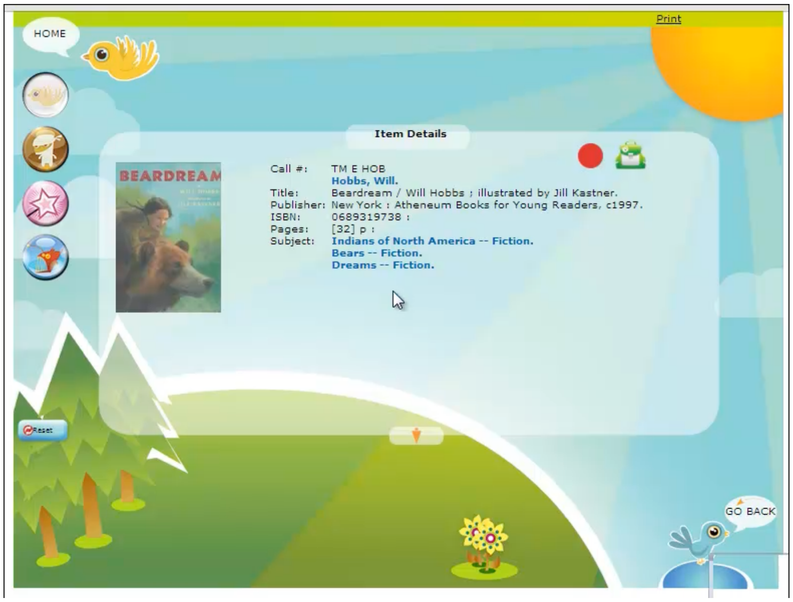
Mandarin Oasis works with your existing Oasis or WebOPAC and includes the features you are already familiar with, in a format that will attract young library users and make their searches fun.

As in the regular OPAC, they can search by Lexile or Fontas and Pinnell range to find materials just right for them to read.

The results list shows title, author and call number. Children can also see whether the items are available or not from the large green or red dot. They can create a bookbag of their favorite items. And they can look at more information about each item.



This details view includes the usual hyperlinks, so they can follow the authors or subjects and see what else they find.



Again, this is connected to your usual OPAC, and clicking on Home brings you right there.

Offer your patrons one more way to interact with your collection and find the materials they need.

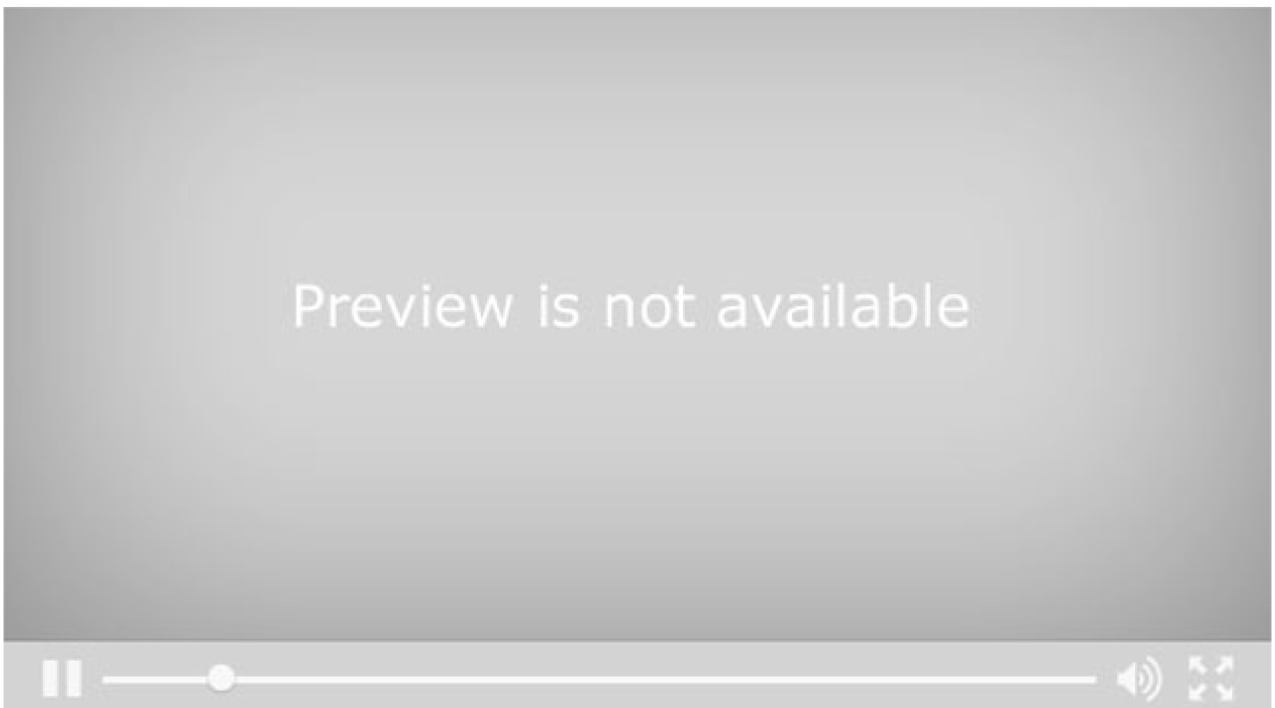
Using the Bookbag

Mandarin's new tools make it easy and intuitive for students and library patrons to manage, store and share lists of library resources.

The Bookbag feature

- Permit the creation of multiple bookbags for any user, and stores them with that user's account.
- Enables the export of a bookbag to create a bibliography.
- Allows faculty to create reading or resource lists that can be easily shared with students.

You can learn more by viewing this short video.



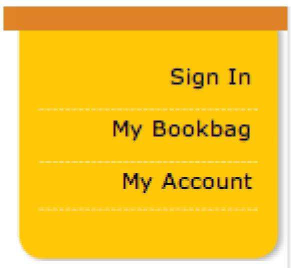
Note: *The amount of time items will be saved in the Bookbag is configured on the Oasis Setup page.*
See "Configuration" chapter for more information

Using My Account

My Account is an optional feature that allows patrons to view information about their accounts. If the system administrator enabled this tab and all of its features, patrons can view information including their current transactions, past transactions, and personal information that is on record with the library. They can also renew items they have on loan as well as cancel reserve, hold, and booking requests.

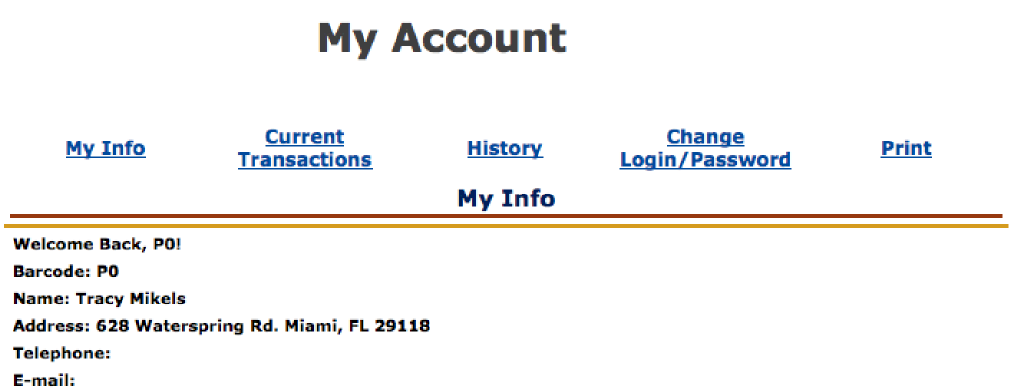
Viewing Your Account Information

1. Click the My Account link in the side menu.



(If you have not already signed in, you will be prompted to do so; for instructions, see “Signing in to the Catalog”. This displays the My Account page.

2. Click the following links to access your information:
   - **My Info** – Lists your personal information, such as address and telephone number, that the library has on file
   - **Current Transactions** – Lists your open transactions
   - **History** – Lists your transaction history
   - **Change Login/Password** – Allows you to change your login information



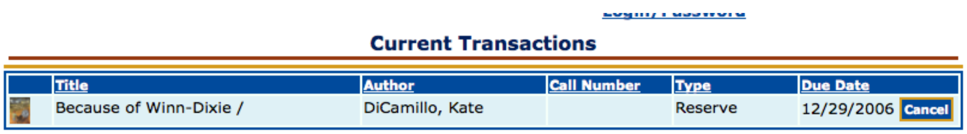
Renewing Items

1. On the My Account page, click the Current Transactions link.
2. Click the Renew button that corresponds to the item you want to renew.
3. On the confirmation page, click OK.

***Note**: The program will not allow a patron to renew an item from within My Account if the item is overdue and past the grace period set in Group Editor for this type of item.*

Canceling a Reserve, Hold, or Booking Request

1. On the My Account page, click the Current Transactions link.
2. Click the Cancel button that corresponds to the item you want to cancel.
3. On the confirmation page, click OK.


Current Transactions

	Title	Author	Call Number	Type	Due Date
	Because of Winn-Dixie /	DiCamillo, Kate		Reserve	12/29/2006 Cancel

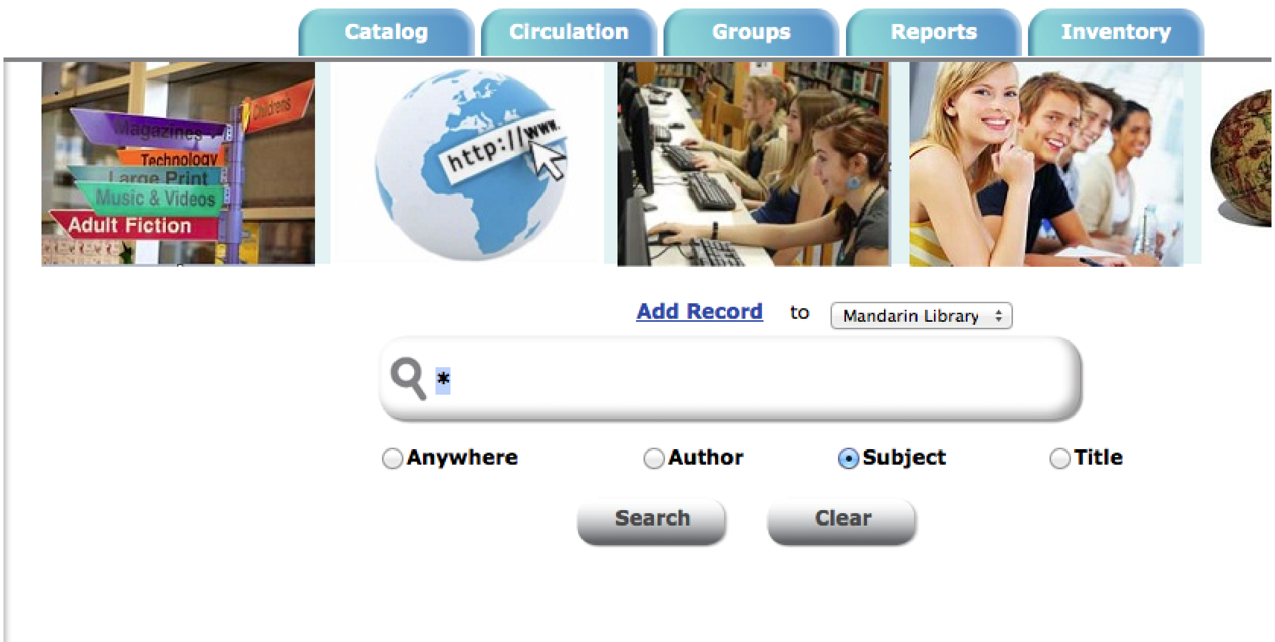
New Features in Release 2.9.3

Catalog supports a new permission called Change Login/Password to control users’ ability to change the username and password in My Account

Using the Catalog

Cataloging allows you to add, edit, duplicate, and delete item and patron records. To access Cataloging, you must sign in to Oasis with the proper permissions. After you've signed in, Oasis displays the tabs for all library functions that you have permission to access.

The bibliographic and patron record editors are accessed from the Catalog's **Search** page and **Results** page, and the holding record editor is accessed from the Details page.



When you have created or edited a record and are ready to save it, keep in mind that any fields left empty in the record will be deleted when you save the record. If you do not want empty fields to be deleted, change the Strip Empty Fields entry in the Global.ini.REG file (the default path is ***C:\M3 Server\Registry\Common) to OVERRIDE=on***. This setting will take effect the next time you start the record editor. Authority Control users should not change this setting.

Bib Records (Add, Duplicate, Edit, Add from Z39.50)

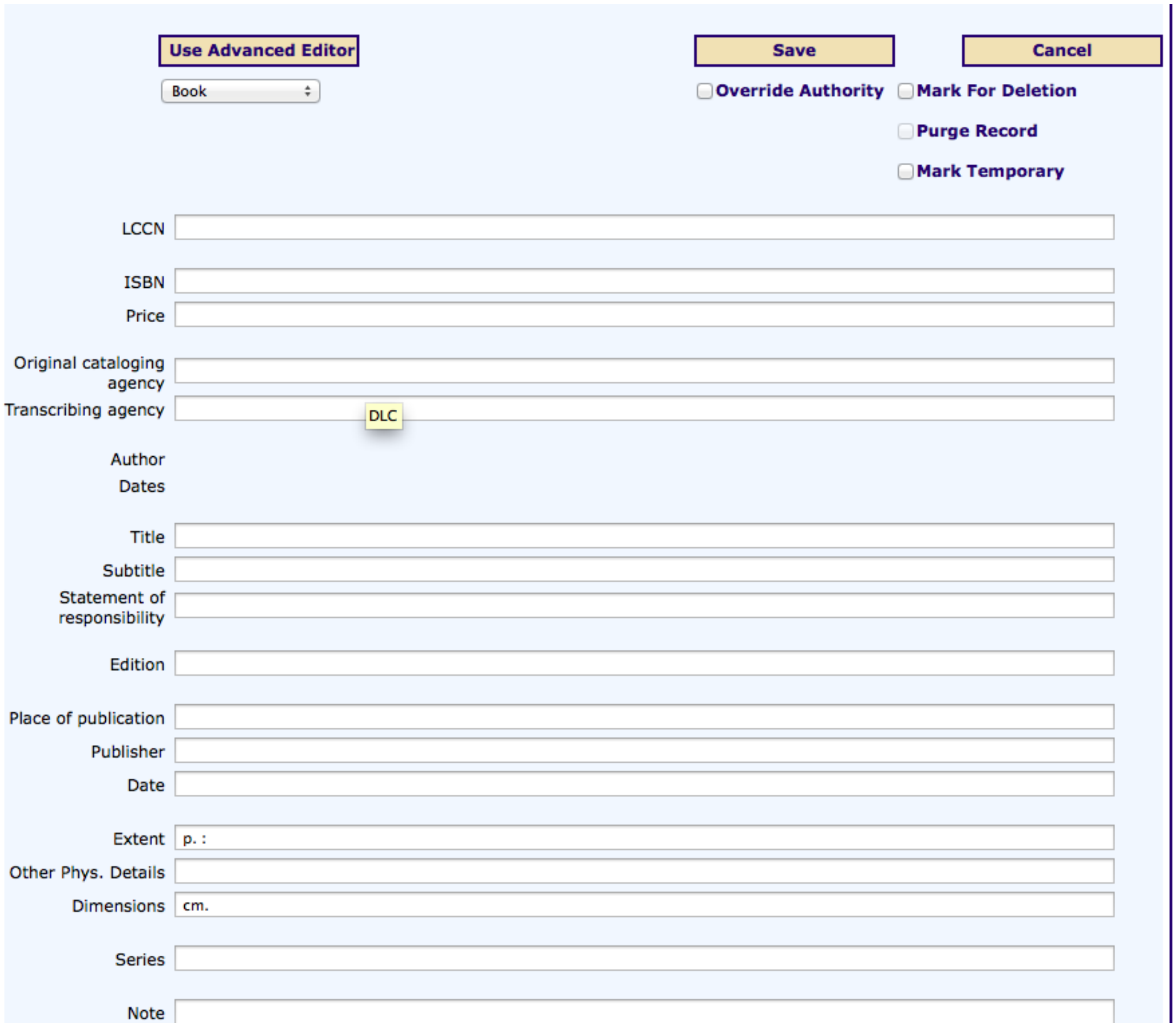
***Note**: Bibliographic records can also be added and edited within Circulation.*

Adding a Bibliographic Record to the Catalog

On the Search page or Results page, click the **Add Record** link at the top of the page. This displays the basic record editor, which allows you to quickly enter a record. If more options are required, skip to Using the Advanced Editor.

Using the Basic Editor

1. Select the media type in the list at the top (for example, Book). This displays the appropriate fields for this media type.
2. Type data in the desired fields.
3. To mark this record for deletion, select the **Mark for Deletion** check box. The record will not be totally removed from the database until you select the **Purge Record** check box and then Save.
4. If you have Authority Control installed, certain authority-controlled fields are editable only when the **Override Authority** check box is selected. If you do not want these fields to be editable, clear the check box.
5. When finished, click **Save**.



Note: *The Override Authority check box appears only if Authority Control is installed on your system.*

New Features in Release 2.9.3

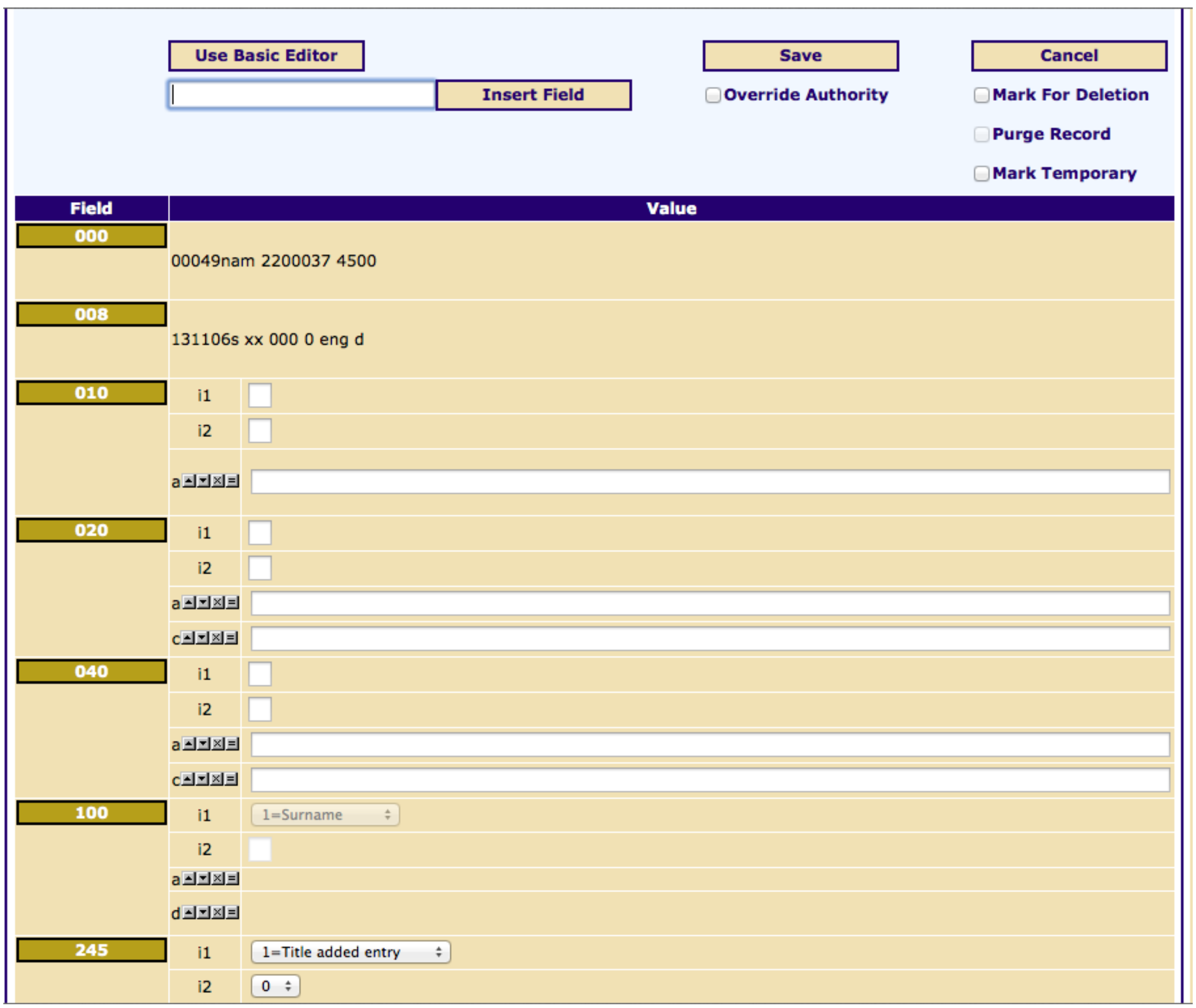
Record Editor now allows the user to set visibility using the Mark Invisible checkbox.

Using the Advanced Editor

1. To display more field and subfield choices, click **Use Advanced Editor**. This displays the advanced record editor
2. On this page, you can edit the record.

- To insert a new field, type the field number in the keyword box at the top, then click **Insert Field.** This displays another page with subfield choices; its contents will vary depending on the field. Select the check box next to the desired subfield, or type the subfield in the keyword box, then click **OK**.
- You can hold your mouse over the number in the Field column until a menu displays, then click an option in the menu. In control fields, your options are **Edit** or **Delete**; in data fields, your options are **Insert Subfield, Delete, Move Up, Move Down**, and **Rename**.
- To mark this record for deletion, select the **Mark for Deletion** check box. The record will not be totally removed from the database until you select the **Purge Record** check box and then **Save**.
- If you have Authority Control installed, certain authority-controlled fields are editable only when the **Override Authority** check box is selected. If you do not want these fields to be editable, clear the check box.

3. When finished, click Save.



***Tip:** To type multiple fields or subfields in a keyword box,* *separate the entries with a comma and no spaces (for example, to insert fields 200, 300, and 500, type 200,300,500).*

***Note:** The Override Authority check box appears only if Authority Control is installed on your system.*

Adding Records to the Catalog from Z39.50 Sites (Record Fetch)

In Record Fetch you can add records from the Z39.50 sites configured by your system administrator. After searching for the desired records, add them to your bookbag and then add them to the catalog.

1. Select **Record Fetch** in the side menu.
2. Under **Libraries,** select each site you want to search, then click back on **Record Fetch** to return to the Search page.
3. Enter your search query and click **Search**. This displays the Results page with the list of search results.
4. Select the **My Bookbag** check box next to each record you want to add. This adds these records to your bookbag.
5. Click the **My Bookbag** link in the side menu to access your bookbag. To add these records to the catalog, click the **Add Records** link at the top of the page.
6. A confirmation appears; click **OK**.

To import multiple records from Z39.50 sites by using ISBNs or ISSNs, see Using ISBN/ISSN Fetch.

***Note:** For information on configuring Z39.50 sites, see "Configuration" chapter.*

***Tip:** You can clear the check box next to any record you do not want to add to the catalog; it will be removed from your bookbag.*

New Features in Release 2.9.3

1. Duplicate detection for records added from Record Fetch has been implemented.
2. Items that are added via Record Fetch now create holdings for each occurrence of 852.
3. The Setup page has been enhanced to allow the user to reset Record Formats and Record Templates to the current default.
4. A new key has been added to the Z39.50 Searches databases to control whether 852 fields should be removed when importing records through Record Fetch. The default is to remove.
5. Clicking on the Catalog tab now returns the user to the initial page.

Creating a Bibliographic Record by Duplication

1. Search for the bibliographic record you want to duplicate. Enter the desired search criteria, then click **Search**. This displays the Results page with your search results.
2. On the Results page, click the **Duplicate** link under the bib record. This displays the basic record editor with a duplicate record. (To display more field and subfield choices, click **Use Advanced Editor**. This displays the advanced record editor. See Using the Advanced Editor.)
3. Edit the data as needed.
4. To mark this record for deletion, select the **Mark for Deletion** check box. The record will not be totally removed from the database until you select the **Purge Record** check box and then **Save**.

Editing a Bibliographic Record

1. Search for the bibliographic record you want to edit. Enter the desired search criteria, then click **Search**. This displays the Results page with your search results.
2. Click the **Edit** link under the bib record. This displays the advanced record editor with record data.
3. Edit the data as desired.

Tip: To create a more specific search, enter MARC field and subfield codes (e.g. 852#k) in the small empty boxes next to the dropdown menus of the search form. Then enter the search criteria in the box below as usual. Information in the small box overrides and ignores the dropdown menu.

4. To mark this record for deletion, select the **Mark for Deletion** check box. The record will not be totally removed from the database until you select the **Purge Record** check box and then **Save**

NOTES:

- To undelete a record, click **Edit** on the Results page. In the record editor, clear the **Mark for Deletion** check box, then click **Save**.
- Records can be deleted and/or purged in batches in Advanced Cataloging. See Using Find and Replace.

Holding Records (Add, Edit)

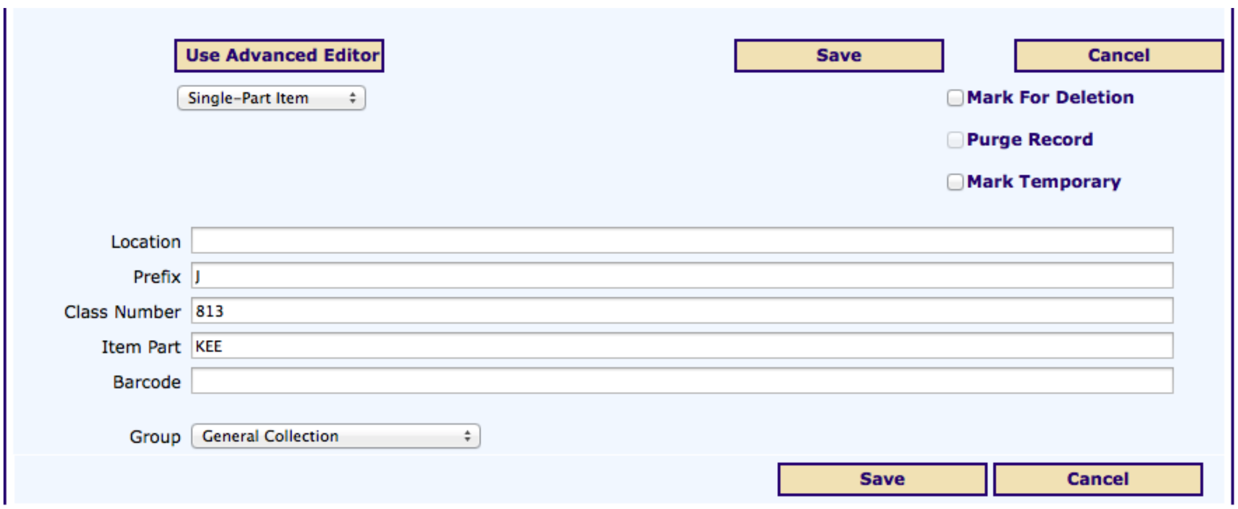
***Note**: Holding records can also be added and edited within Circulation.*

Adding a Holding Record to the Catalog

1. Search for the bib record to which you want to add a holding. Enter the desired search criteria, then click **Search**. This displays the Results page with your search results.
2. On the Results page, click the **Details** link in the bib record. This displays the Details page.
3. Click the Add Holding link at the top of the page. This displays the basic record editor, which allows you to quickly enter a record. If more options are required, skip to Using the Advanced Editor.

Using the Basic Editor

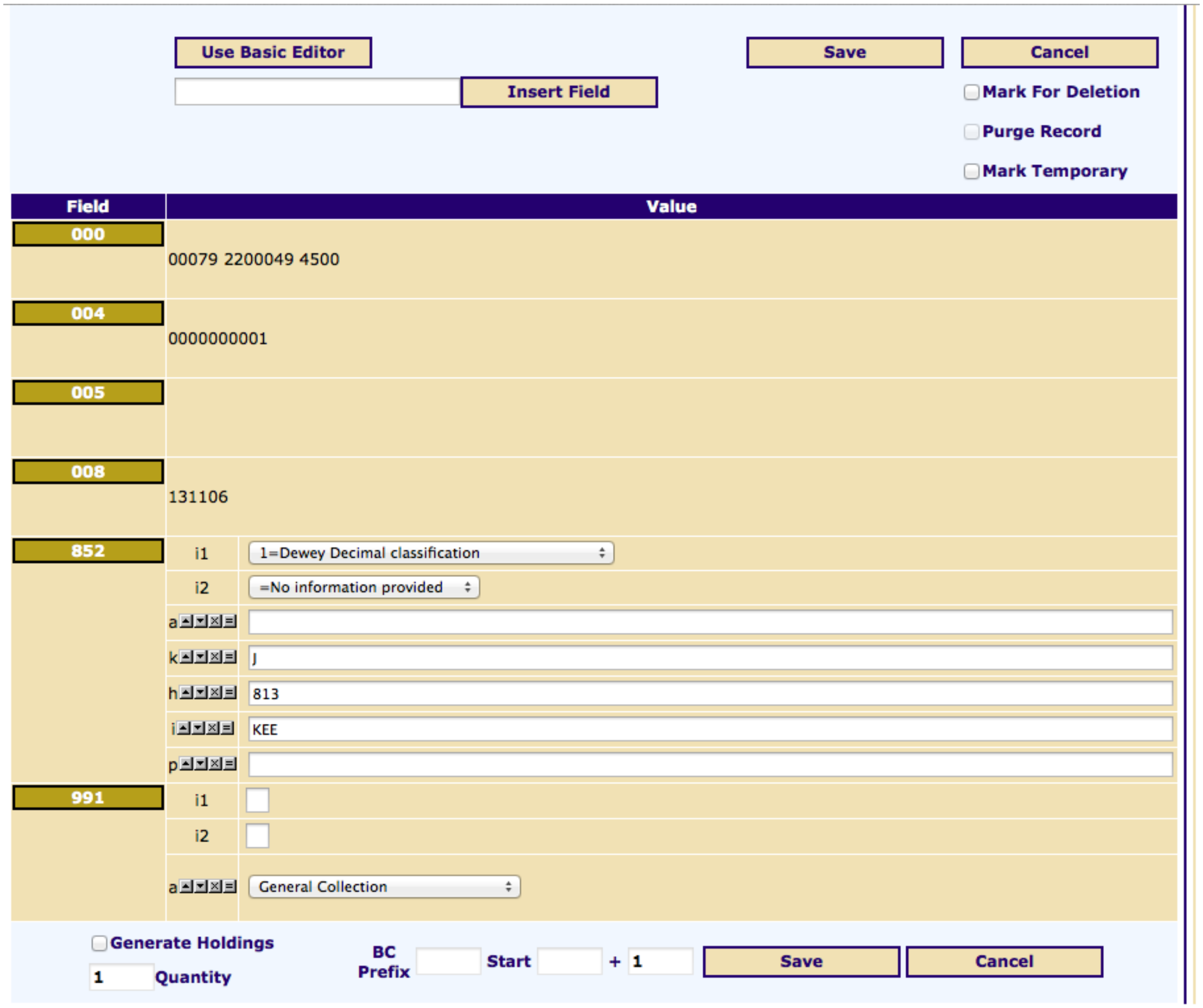
1. Select the item type in the list at the top (for example, **Single-Part Item**). This display the appropriate fields for this item type. This displays the appropriate fields for this item type.
2. Type data in the desired fields.
3. To mark this record for deletion, select the **Mark for Deletion** check box. The record will not be totally removed from the database until you select the **Purge Record** check box and then **Save**.



Using the Advanced Editor

1. To display more field and subfield choices, click **Use Advanced Editor**. This displays the advanced record editor.
2. On this page, you can edit the record.

- To insert a new field, type the field number in the keyword box at the top, then click **Insert Field**. This displays another page with subfield choices; its contents will vary depending on the field. Select the check box next to the desired subfield, or type the subfield in the keyword box, then click **OK**.
- You can hold your mouse over the number in the **Field** column until a menu displays, then click an option in the menu. In control fields, your options are **Edit or Delete**; in data fields, your options are **Insert Subfield, Delete, Move Up, Move Down, and Rename.**
- To mark this record for deletion, select the **Mark for Deletion** check box. The record will not be totally removed from the database until you select the **Purge Record** check box and then **Save**.



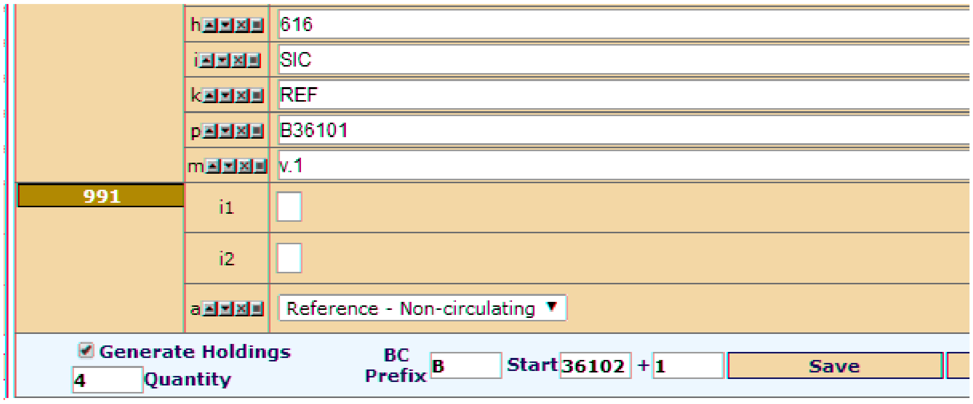
***Tip**: To type multiple fields or subfields in a keyword box, separate the entries with a comma and no spaces (for example, to insert fields 200, 300, and 500, type 200,300,500).*

Editing a Holding Record

1. Search for the bib record for the holding you want to edit. Enter the desired search criteria, then click **Search**. This displays the Results page with your search results.
2. On the Results page, click the **Details** link in the bib record. This displays the Details page.
3. Under **Copies/Availability**, locate the desired holding and click its **Edit** link. This displays the advanced record editor with record data.
4. Edit the data as desired.
5. To mark this record for deletion, select the **Mark for Deletion** check box. The record will not be totally removed from the database until you select the **Purge Record** check box and then **Save**.

Adding Multiple Holding Records

To generate multiple holding records for one bibliographic record, in the case of multiple copies or multiple volumes, for example, click on the **Generate Holdings** checkbox at the bottom of the record in the Advanced Editor.



- In the Quantity box, indicate the number of additional holding records to create.
- In the **BC Prefix** box, enter the barcode prefix, if there is one.
- In the **Start** box enter the first barcode number to be used (minus any prefix).
- In the + box enter the increment between barcodes to be created.
- Click **Save**.

NOTES:

- To undelete a record, click **Edit** on the Results page. In the record editor, clear the **Mark for Deletion** check box, then click **Save**.
- Records can be deleted and/or purged in batches in Advanced Cataloging. See Using Find and Replace.

Patron Records (Add, Duplicate, Edit, Delete)

***Note**: Patron records can also be added and edited within Circulation.*

To deal with patron records in the Catalog, first change the active database to the patron database.

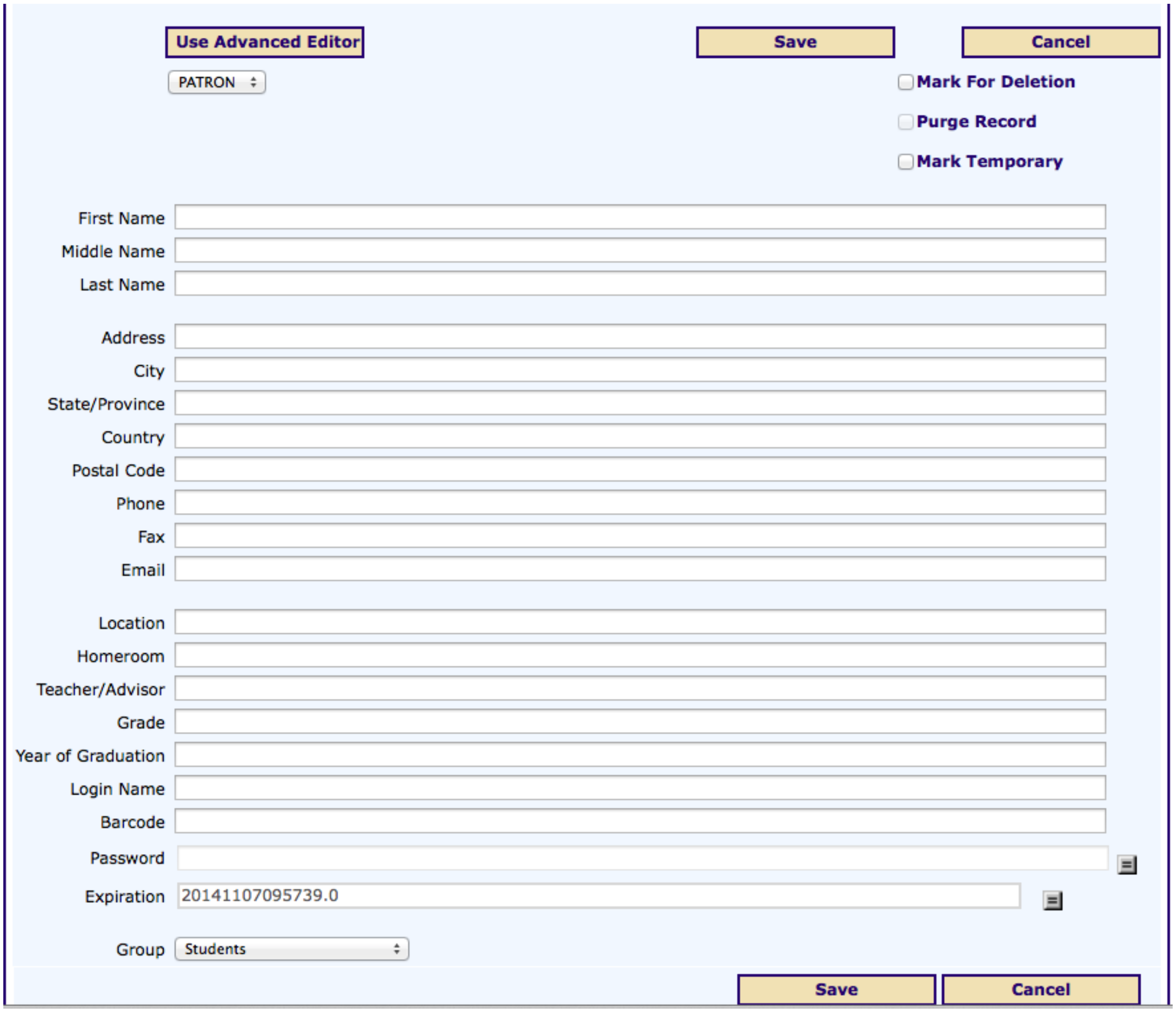
- Click on **Libraries** in the left menu.
- Change the dropdown menu from **standard** to **patrons**.
- Click back on one of the Search pages (Standard, Enhanced, or Visual).

Adding a Patron Record to the Catalog

On the Search page or Results page, click the **Add Record** link at the top of the page. This displays the basic record editor, which allows you to quickly enter a record. If more options are required, skip to Using the Advanced Editor.

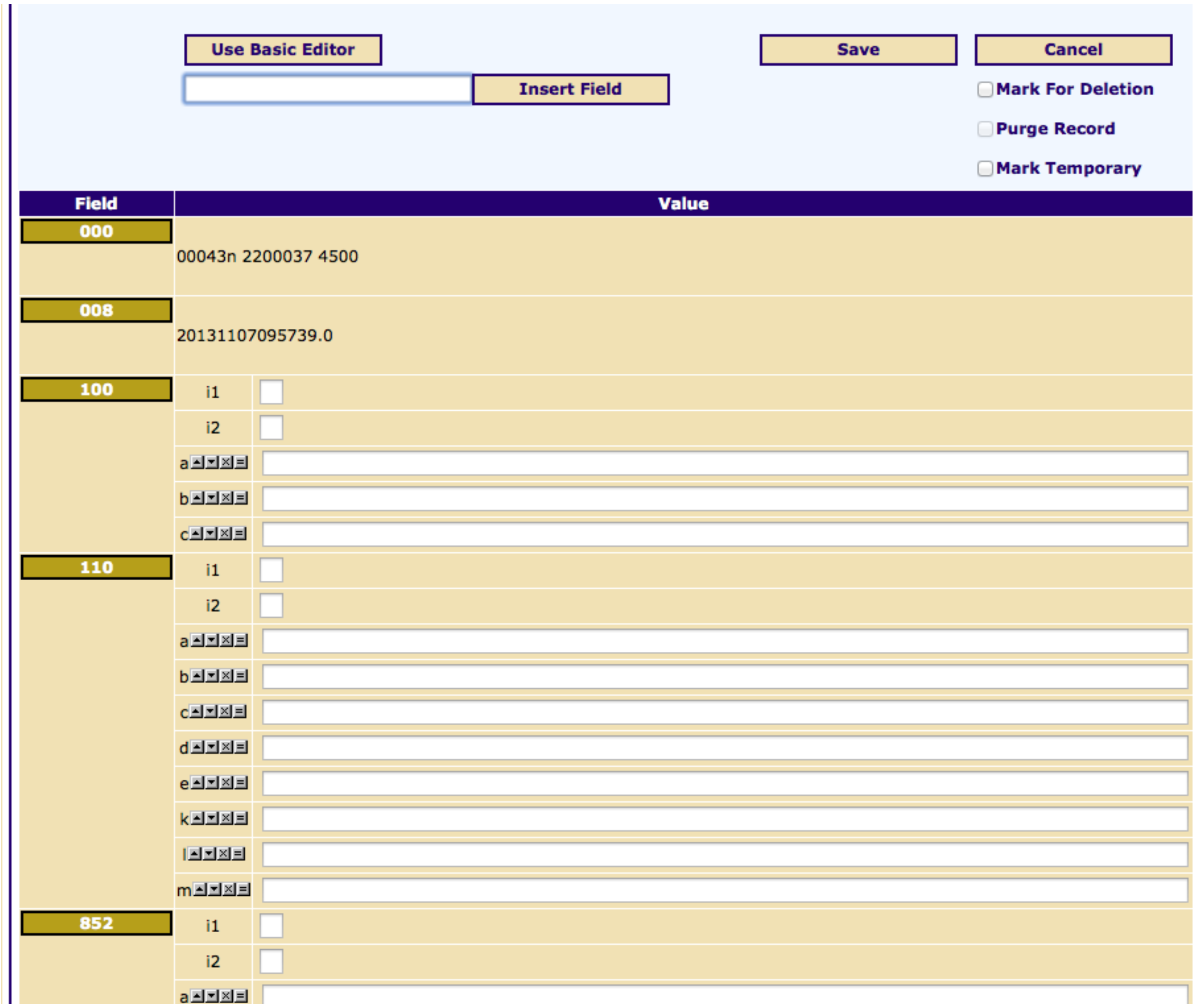
Using the Basic Editor

1. Type data in the desired fields.
2. To mark this record for deletion, select the **Mark for Deletion** check box.
   The record will not be totally removed from the database until you select the **Purge Record** check box and then **Save**.
3. When finished, click Save.



Using the Advanced Editor

1. To display more field and subfield choices, click **Use Advanced Editor**. This displays the advanced record editor.
2. On this page, you can edit the record.



- To insert a new field, type the field number in the keyword box at the top, then click **Insert Field**. This displays another page with subfield choices; its contents will vary depending on the field. Select the check box next to the desired subfield, or type the subfield in the keyword box, then click **OK**.
- You can hold your mouse over the number in the **Field** column until a menu displays, then click an option in the menu. In control fields, your options are **Edit** or **Delete**; in data fields, your options are **Insert Subfield, Delete, Move Up, Move Down, and Rename.**
- To mark this record for deletion, select the **Mark for Deletion** check box. The record will not be totally removed from the database until you select the **Purge Record** check box and then **Save.**

3. When finished, click Save.

Tip: *To type multiple fields or subfields in a keyword box, separate the entries with a comma and no spaces (for* *example, to insert fields 200, 300, and 500, type 200,300,500).*

Creating a Patron Record by Duplication

1. Search for the patron record you want to duplicate. Enter the desired search criteria, then click **Search**. This displays the Results page with your search results.
2. On the Results page, click the **Duplicate** link in the patron record. This displays the basic record editor with a duplicate record. (To display more field and subfield choices, click **Use Advanced Editor**. This displays the advanced record editor. See Using the Advanced Editor.)
3. Edit the data as needed.
4. To mark this record for deletion, select the **Mark for Deletion** check box. The record will not be totally removed from the database until you select the **Purge Record** check box and then **Save**.
5. When finished, click **Save**.

Editing a Patron Record

1. Search for the patron record you want to edit. Enter the desired search criteria, then click **Search**. This displays the Results page with your search results.
2. Click the **Edit Record** link in the patron record. This displays the basic record editor with record data. (To display more field and subfield choices, click **Use Advanced Editor**. This displays the advanced record editor. See Using the Advanced Editor.)
3. Edit the data as desired.
4. To mark this record for deletion, select the **Mark for Deletion** check box. The record will not be totally removed from the database until you select the **Purge Record** check box and then **Save**.
5. When finished, click **Save**.

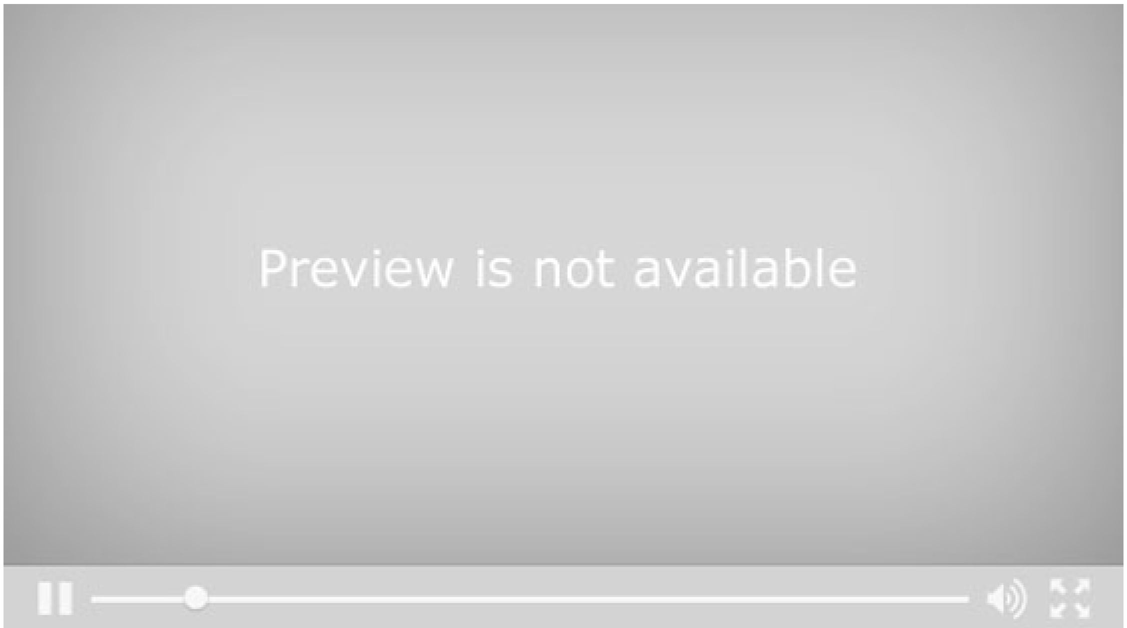
Deleting a Record

1. Search for the record you want to delete.
2. On the Results page, click **Delete**. This marks the record for deletion. The record will not be totally removed from the database until you select the **Purge Record** check box and then **Save**.

NOTES:

- To undelete a record, click **Edit** on the Results page. In the record editor, clear the **Mark for Deletion** check box, then click **Save**.
- Records can be deleted and/or purged in batches in Advanced Cataloging. See Using Find and Replace.

Custom Record Templates



There is a new feature in Version 2.8 of Mandarin Oasis that I would like to show you. The program now allows the librarian to create and modify cataloging templates. For bibliographic records this will be especially helpful for any librarians who do original cataloging. Being able to modify the holdings templates will be useful in every library.

Here's how it works

First, in order to use this feature, to be able to create or modify templates, you need to go to your Setup page. There you'll see a new option at the bottom of the dock on the left called Record Templates.

When you have logged in, clicked on the **Edit** button for your installation, and selected this option, you'll see all the templates that are currently available for your installation. The default selection for each type of record is None. If you leave the default there, you will have the standard templates that come with the program, and you will not have the option to make new templates. If you want to be able to modify and create templates, select one of the templates listed. If the book template is the one you use the most for creating bibliographic records, choose that. For each type of record choose the one that you will use the most.

When you next log into Oasis as a librarian and want to add that type of record, you will see your choice as the default, and you'll see the Save as template button at the top of the Basic Editor. Now make the changes that you need to make. At the very least you will probably want to put in your location information, for example, so that you don't need to type it every time. Add or change any other information that you want in your records. In this holdings template for example, I'm going to put p and usd in the price subfield so I remember that the cost goes in that format. If you need to add or delete any fields or subfields, you can do that in the Advanced Editor. Then click **back** to the Basic Editor and click **Save** as Template. You can replace one of the default templates, or you can give your template a unique name.

When you look at your Setup page again, you'll see your new template in the list for this type of record. You can set it as the default, or you can delete it here, if it's not what you want.

Advanced Cataloging Tools

Importing Records

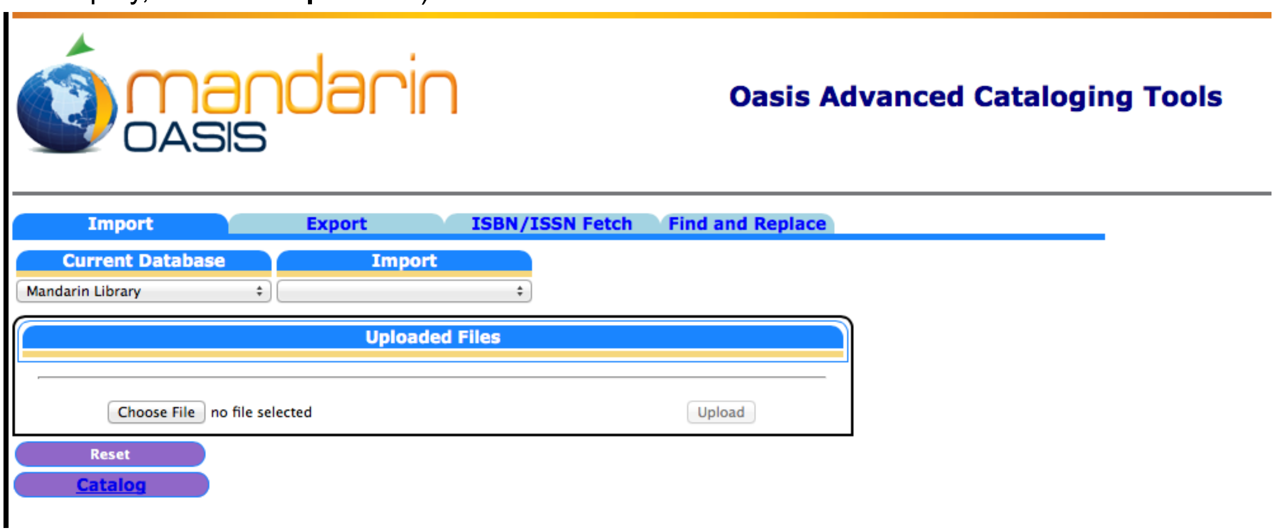
Before importing records, be sure the item or patron group you plan to import the records into has already been created in the Group Editor.

Oasis allows you to import bibliographic, holding, and patron records formatted in three different data types:

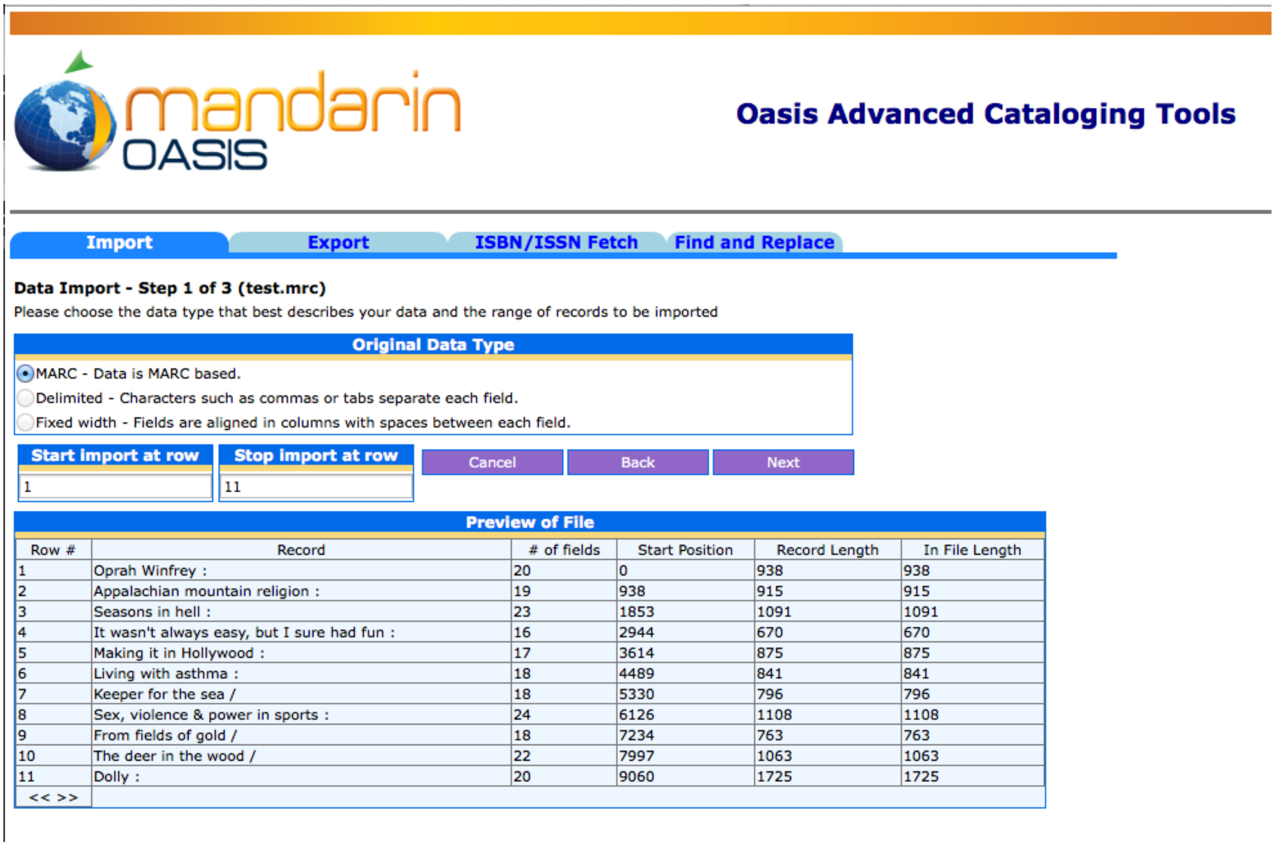
- MARC – Records in MARC format.
- Delimited – Records in which each field ends with, or is "delimited" by, a particular character such as a comma or tab.
- Fixed width – Records in which each field has a designated maximum width in number of characters.

During the import procedure, despite which of the three data types applies to the records to be imported, the records are mapped into a MARC record format. This is necessary as Oasis is designed to operate exclusively with MARC records to provide optimum performance.

1. Click the **Cataloging Tools** link in the side menu. This displays the Import page. (If the Import page does not display, click the **Import** tab.)



2. In the **Current Database** list, select the database to import the records into.
3. In the **Import** list, select the type of records you are importing, bibliographic, patron or holding.
4. If you have already uploaded the records, skip to step 6. Otherwise, click **Choose File** and navigate to the record file, then click **Open**. The path to the file appears in the box.
5. Click **Upload**. The barcode file appears in the **Uploaded Files** list.
6. Click the **Import** link to the right of the barcode file. This displays the Data Import - Step 1



Oasis Advanced Cataloging Tools

Import | Export | ISBN/ISSN Fetch | Find and Replace

Data Import - Step 1 of 3 (test.mrc)

Please choose the data type that best describes your data and the range of records to be imported

Original Data Type

- MARC - Data is MARC based.
- Delimited - Characters such as commas or tabs separate each field.
- Fixed width - Fields are aligned in columns with spaces between each field.

Start import at row: 1 | Stop import at row: 11 | Cancel | Back | Next

Preview of File

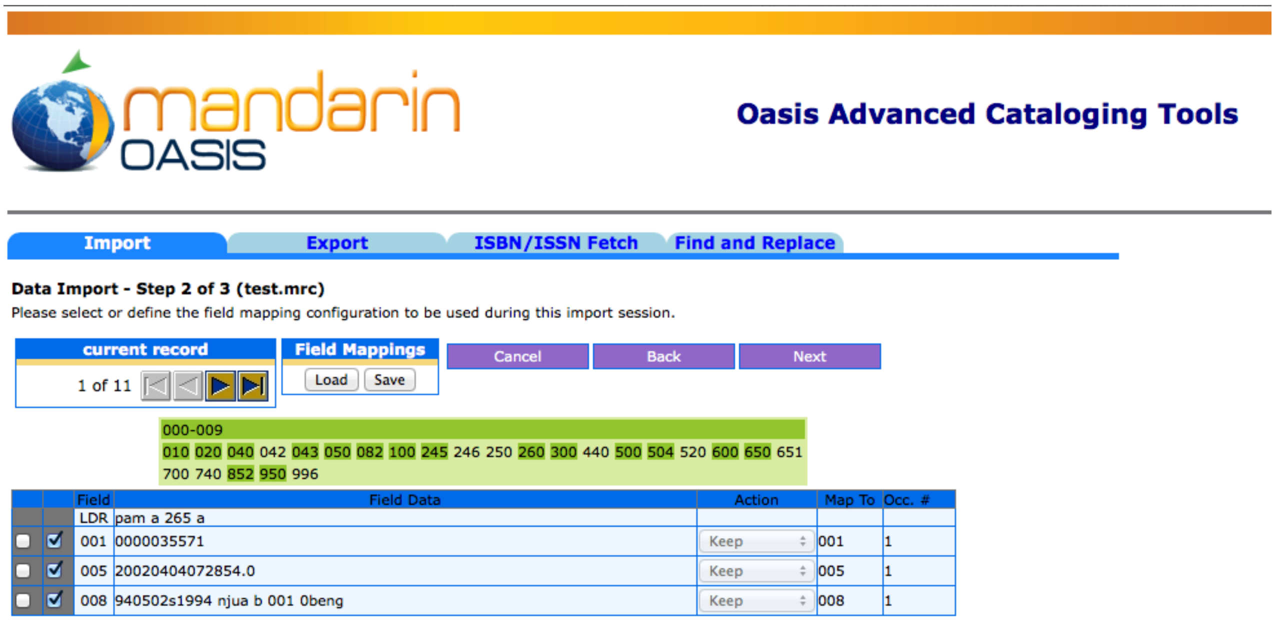
Row #	Record	# of fields	Start Position	Record Length	In File Length
1	Oprah Winfrey :	20	0	938	938
2	Appalachian mountain religion :	19	938	915	915
3	Seasons in hell :	23	1853	1091	1091
4	It wasn't always easy, but I sure had fun :	16	2944	670	670
5	Making it in Hollywood :	17	3614	875	875
6	Living with asthma :	18	4489	841	841
7	Keeper for the sea /	18	5330	796	796
8	Sex, violence & power in sports :	24	6126	1108	1108
9	From fields of gold /	18	7234	763	763
10	The deer in the wood /	22	7997	1063	1063
11	Dolly :	20	9060	1725	1725
<< >>					

A. Under **Original Data Type** select **MARC, Delimited** or **Fixed**.
B. In the **Start import at row** and **Stop import at row** boxes, select the range of records you want to import. By default, the first and last row numbers in the barcode file are displayed. If you only want to import a portion of the records in the file, type the row numbers corresponding to the range you want to import.
C. When finished, click **Next**.

Continue on how to import MARC Records, Delimited Records or Fixed Width Records according to the **Original Data Type selected.**

MARC Records

7. On the Data Import - Step 2, indicate the field mapping configuration to be used during the import session.



The green box lists all fields, with the fields in the current record displayed in darker green. You can click a field to view it. To view another record, click the navigation arrows under **current record.**

You can either accept the default configuration or modify it, or select a previously saved field map. If you accept the default, click **Next** and skip to step 8.

To use a previously saved field map, click **Load** in the **Field Mappings** box. A window will open with a list of the previously saved field maps. Click **Load** next to the name of the desired map. At this point you can modify the field map again or click **Next** and skip to Data Import - step 3.

To modify the field mapping configuration:

A. In the Step 2 dialog box, review the Field column for fields that repeat. If you plan to change the mapping of a repeating field, and if all occurrences of the repeating field are to be mapped to the same destination field, then you can save time and keystrokes by selecting the **Field Collapse** check box. This collapses all the occurrences of the repeating field into one line, creating a single occurrence and enabling you to simultaneously remap all occurrences of this field to the same field. (If you do not use this feature, you must revise the mapping for each occurrence individually.) To use this option, select the **Field Collapse check box** by the first occurrence of the repeating field.

B.

In the second check box column, all fields and subfields are selected by default. Clear the check box next to the fields and subfields you do not want to import.

C. In the Action column, select **Keep** or **Replace** for each field and subfield you plan to import.
   - Select **Keep** if you want the data currently stored in that field to be kept during the import procedure.
   - Select **Replace** if you want to change the current data in a field to a constant value (such as a library name, regional code, or field label) during the import procedure. A keyword box will display in the **Field Data** column; type the information you want to appear in this field.

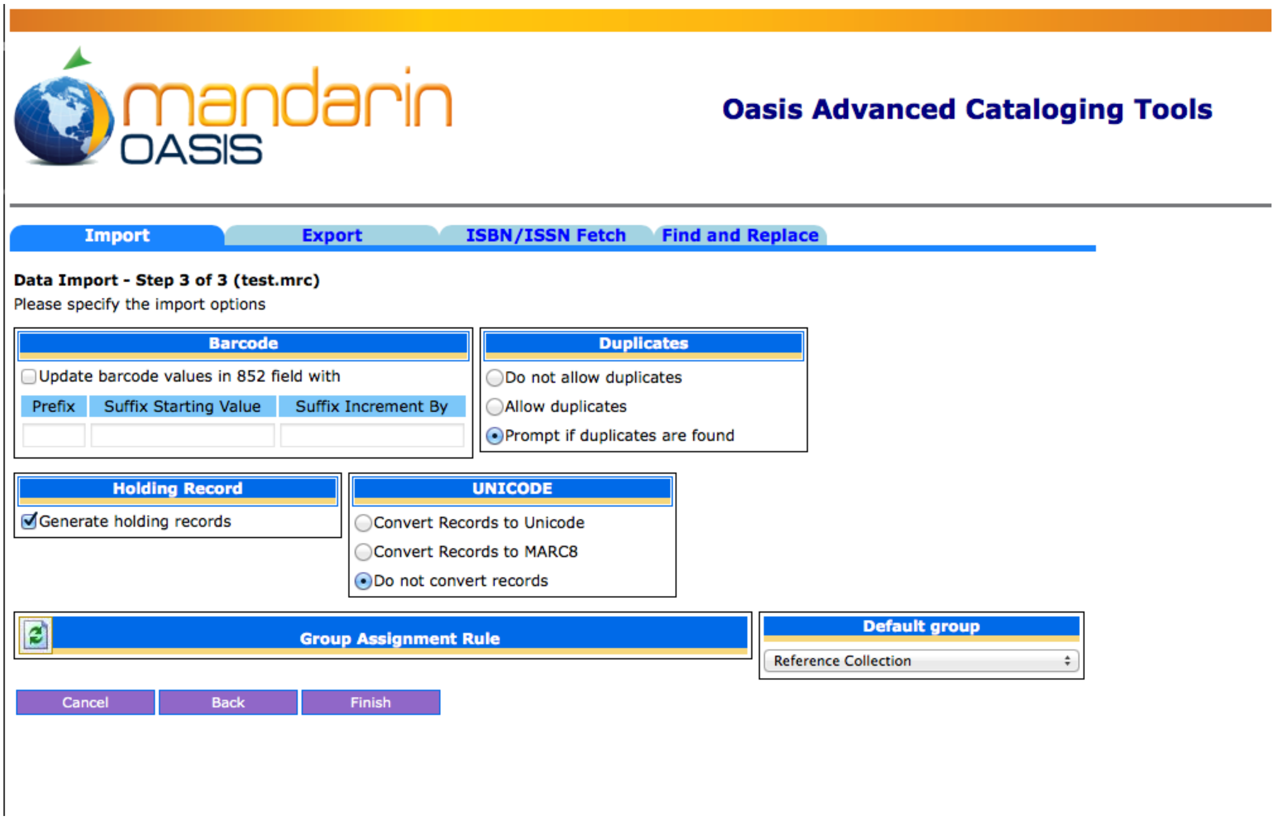
D. The **Map To column** indicates the destination MARC field or subfield for each field you plan to import. By default, this column displays the same field tag number and subfield code listed in the **Field** column.

Tip: *To map most but not all occurrences of a repeating field to the same destination field, you can still use the optional Field Collapse procedure explained in step A, with one modification. After selecting the Field Collapse check box and revising the Map To destination, clear the Field Collapse check box. This separates the repeating field listings once again but maintains the Map To modification entered while the fields were united. You can then modify the mapping as explained in step D for those few listings that do not match the global change you entered while the fields were united.*

To change the Map To value, type a new field and subfield in the text box, or click the arrow to the right and select a field and subfield in the window.

E. Click **Next**.

8. On the Data Import - Step 3, specify the import options.



***Tip:** You must have 852 fields in the records you are importing or other fields mapped to 852 in order for **Update barcode values in 852 field** with to work. If no 852 field is found in a record, then no barcode is generated for that record.*

A. You can create new barcodes for the records being imported, whether barcodes exist in the original records or not. To do so, select the **Update barcode** values in 852 field with check box under Barcode. Then:

- **Prefix** – To assign a constant prefix to the barcode, type it here. For example, type B for bibliographic records or P for patron records. You must assign different prefixes to bibliographic records and patron records.
- **Suffix Starting Value** – To assign an incrementing suffix to the barcodes in the order they import into the system, type the numeric starting value for these records (for example, type **1**).
- **Suffix Increment By** – If you assign a suffix, type the number of increments you want the records to increase by (for example, **1** increment).

B. If you are importing bibliographic records, the **Duplicates** options are available. Choose one of the following:

- To prevent the import of records that may duplicate existing records, click **Don't allow duplicates**. (All fields in two records need not match for the records to be considered duplicates; for example, two bibliographic records may be considered duplicates if just the ISBN field matches.)
- To import records that may duplicate existing records, click **Allow duplicates.**
- To be prompted when duplicate records are found during the import process, click Prompt if duplicates are found option. This lets you compare the record you are importing to the existing record, and then decide whether to import the duplicate record.

C. If you are importing bibliographic records, the **Holding Records** option is available. If you do not want to generate holding records**,** clear the **Generate holding records** check box. Otherwise, leave it selected.
D. In the **Unicode** box, you can choose to convert records to Unicode, convert records to MARC8, or not convert records.
E. In the **Default group** list, select the group you want the imported data assigned to by default.
F. If you want to assign a rule to this data, click the **Expand View** button next to **Group Assignment Rule**.

- Select the check box to the left of the first box to activate it. To the right of the box, click the arrow button.
- Enter the rule you want assigned. (Example: Type **852k** under Field, select **Equals,** and then type **REF** under **Text.)**
- Click **Add**. Add other rules if desired. When finished, click **Close**.
- In the list to the right of the arrow, select the group to assign records to when they meet the rule criteria. (Example: Select **Reference Collection** to complete the example in step 2.)

9. When finished, click **Finish**. While the import processes, a progress bar displays.

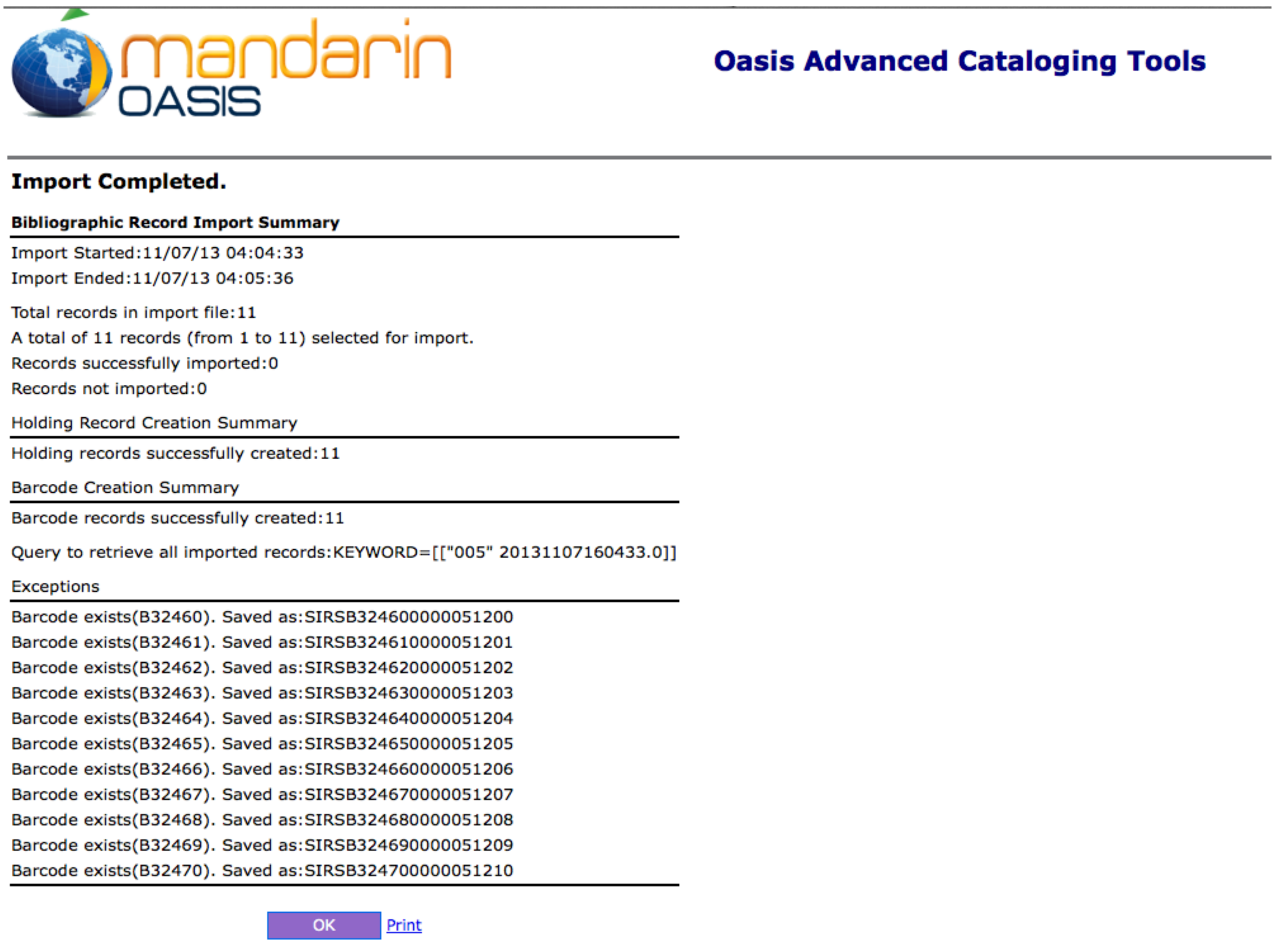
If a duplicate record is found and you selected **Prompt if duplicates** are found in step 8B, the Bibliographic Compare window displays

Using the four buttons, you have the following choices:

- **Save Existing** – Saves the existing record and does not import the duplicate record. All corresponding holding records are imported. Result: One bibliographic record with all corresponding holding records.
- **Replace Existing** – Imports the duplicate record and replaces the existing record. All corresponding holding records are also imported. Result: One bibliographic record with all corresponding holding records.
- **Import** – Imports the duplicate record and keeps the existing record. All corresponding holding records are also imported and linked to the duplicate bibliographic record. Result: Two bibliographic records and two sets of holdings—the existing bibliographic record and its original holdings, and the duplicate bibliographic record and its corresponding holdings.
- **Do not Import** – Does not import the duplicate record. Result: The bibliographic record and its holding records remain the same.

Tip*: Select the* ***Don't show this window again*** *check box* *before clicking a button to apply the action to the displayed record and all records being imported in this session.*

10. When the import procedure is complete, the import summary displays. Click **OK** to return to the Import page, or click Print to print the summary.



Oasis Advanced Cataloging Tools

Import Completed.

Bibliographic Record Import Summary

Import Started:11/07/13 04:04:33
Import Ended:11/07/13 04:05:36

Total records in import file:11
A total of 11 records (from 1 to 11) selected for import.
Records successfully imported:0
Records not imported:0

Holding Record Creation Summary

Holding records successfully created:11

Barcode Creation Summary

Barcode records successfully created:11

Query to retrieve all imported records:KEYWORD=[["005" 20131107160433.0]]

Exceptions

Barcode exists(B32460). Saved as:SIRSB324600000051200
Barcode exists(B32461). Saved as:SIRSB324610000051201
Barcode exists(B32462). Saved as:SIRSB324620000051202
Barcode exists(B32463). Saved as:SIRSB324630000051203
Barcode exists(B32464). Saved as:SIRSB324640000051204
Barcode exists(B32465). Saved as:SIRSB324650000051205
Barcode exists(B32466). Saved as:SIRSB324660000051206
Barcode exists(B32467). Saved as:SIRSB324670000051207
Barcode exists(B32468). Saved as:SIRSB324680000051208
Barcode exists(B32469). Saved as:SIRSB324690000051209
Barcode exists(B32470). Saved as:SIRSB324700000051210

OK Print

Note: *Any duplicate barcodes are changed to a barcode of "SIRS" followed by the intended barcode and ISN of the holding.*

Delimited Records

7. On the Data Import - Step 2, set the delimiters for your data. Your changes display in the preview pane.

- In the **Field Delimiter** list, choose how the fields in the file will be separated: comma, semicolon, tab, or space.
- In the **Text Qualifier** list, choose the character you want to mark the beginning and end of data in a field, or choose no character. For example, if a field contains **lastname, firstname,** the data might be enclosed within quotes, as in “lastname, firstname”.
- Click **Next.**

8. On the Data Import - Step 3, indicate the field mapping configuration to be used during the import session.

A. In the check box column, no fields are selected by default. Select the check box next to each field you want to import.
B. In the **Action** column, select Keep or Replace for each field and subfield you plan to import.

- Select **Keep** if you want the data currently stored in that field to be kept during the import procedure.
- Select **Replace** if you want to change the current data in a field to a constant value (such as a library name, regional code, or field label) during the import procedure. A keyword box will display in the Field Data column; type the information you want to appear in this field.

C. In the **Map To** column, enter the destination MARC field and subfield for each field you plan to import. Type a new field and subfield in the text box, or click the arrow to the right and select a field and subfield in the window.
D. Click **Next.**

If you will be importing the same type of data in the same format multiple times, you can save the field map after you create it. Click on the **Save** button in the **Field Mappings** box and enter a name for the map.

To use a previously saved field map, click **Load** in the **Field Mappings** box. A window will open with a list of the previously saved field maps. Click **Load** next to the name of the desired map. At this point you can modify the field map again or click **Next** and skip to Data Import -- step 3.

9. On the Data Import - Step 4, specify the import options.

Tip: *You must have 852 fields in the records you are importing or other fields mapped to 852 in order for* ***Update barcode values in 852 field with*** *to work. If no 852 field is found in a record, then no barcode is generated for that record.*

A. You can create new barcodes for the records being imported, whether barcodes exist in the original records or not. To do so, select the **Update barcode values in 852 field** with check box under **Barcode.** Then:

- **Prefix** – To assign a constant prefix to the barcode, type it here. For example, type **B** for bibliographic records or **P** for patron records. You must assign different prefixes to bibliographic records and patron records.
- **Suffix Starting Value** – To assign an incrementing suffix to the barcodes in the order they import into the system, type the numeric starting value for these records (for example, type **1**).
- **Suffix Increment By** – If you assign a suffix, type the number of increments you want the records to increase by (for example, **1** increment).

B. If you are importing bibliographic records, the **Duplicates** options are available. Choose one of the following:

- To prevent the import of records that may duplicate existing records, click **Don't allow duplicates.** (All fields in two records need not match for the records to be considered duplicates; for example, two bibliographic records may be considered duplicates if just the ISBN field matches.)
- To import records that may duplicate existing records, click **Allow duplicates**.
- To be prompted when duplicate records are found during the import process, click **Prompt if duplicates are found** option. This lets you compare the record you are importing to the existing record, and then decide whether to import the duplicate record.

C. If you are importing bibliographic records, the **Holding Records** option is available. If you do not want to generate holding records, clear the **Generate holding records** check box. Otherwise, leave it selected.
D. In the **Unicode** box, you can choose to convert records to Unicode, convert records to MARC8, or not convert records.
E. In the **Default** group list, select the group you want the imported data assigned to by default.
F. If you want to assign a rule to this data, click the **Expand View** button next to **Group Assignment Rule.**

- Select the check box to the left of the first box to activate it. To the right of the box, click the arrow button.
- Enter the rule you want assigned. (Example: Type 852k under **Field,** select **Equals**, and then type **REF** under **Text**.)
- Click Add. Add other rules if desired. When finished, click Close.
- In the list to the right of the arrow, select the group to assign records to when they meet the rule criteria. (Example: Select **Reference Collection** to complete the example in step 2.)

10. When finished, click **Finish.** While the import processes, a progress bar displays. If a duplicate record is found and you selected **Prompt if duplicates are found** in step 9B, the Bibliographic Compare window displays.

Using the four buttons, you have the following choices:

-

Save Existing – Saves the existing record and does not import the duplicate record. All corresponding holding records are imported. Result: One bibliographic record with all corresponding holding records.

- **Replace Existing** – Imports the duplicate record and replaces the existing record. All corresponding holding records are also imported. Result: One bibliographic record with all corresponding holding records.
- **Import** – Imports the duplicate record and keeps the existing record. All corresponding holding records are also imported and linked to the duplicate bibliographic record. Result: Two bibliographic records and two sets of holdings - the existing bibliographic record and its original holdings, and the duplicate bibliographic record and its corresponding holdings.
- **Do not Import** – Does not import the duplicate record. Result: The bibliographic record and its holding records remain the same.

*Tip: Select the **Don't show this window again** check box before clicking a button to apply the action to the displayed record and all records being imported in this session.*

11. When the import procedure is complete, the import summary displays. Click **OK** to return to the Import page, or click **Print** to print the summary.

Fixed Width Records

7. On the Data Import - Step 2, set the column widths.

   A. Under **# of Columns**, type the number of columns you want, then click Update. The number of columns that display in the table update accordingly.
   B. Under **Column Width**, type the number of character spaces you want for each column, then click **Update**. The field data below the table updates accordingly.
   C. When finished, click **Next**.

8. On the Data Import - Step 3 page, indicate the field mapping configuration to be used during the import session.
   A. In the check box column, no fields are selected by default. Select the check box next to each field you want to import.
   B. In the **Action** column, select **Keep** or **Replace** for each field and subfield you plan to import.

   - Select **Keep** if you want the data currently stored in that field to be kept during the import procedure.
   - Select **Replace** if you want to change the current data in a field to a constant value (such as a library name, regional code, or field label) during the import procedure. A keyword box will display in the Field Data column; type the information you want to appear in this field.

   C. In the **Map To** column, enter the destination MARC field and subfield for each field you plan to import. Type a new field and subfield in the text box, or click the arrow to the right and select a field and subfield in the window.
   D. Click **Next**.

If you will be importing the same type of data in the same format multiple times, you can save the field map after you create it. Click on the **Save** button in the **Field Mappings** box and enter a name for the map.

To use a previously saved field map, click **Load** in the **Field Mappings** box. A window will open with a list of the previously saved field maps. Click **Load** next to the name of the desired map. At this point you can modify the field map again or click **Next** and skip to Data Import -- step 3.

9. On the Data Import - Step 4 page, specify the import options.

***Tip**: You must have 852 fields in the records you are importing or other fields mapped to 852 in order for **Update barcode values in 852 field with** to work. If no 852 field is found in a record, then no barcode is generated for that record.*

   A. You can create new barcodes for the records being imported, whether barcodes exist in the original records or not. To do so, select the **Update barcode values in 852 field** with check box under **Barcode**. Then:

- **Prefix** – To assign a constant prefix to the barcode, type it here. For example, type B for bibliographic records or P for patron records. You must assign different prefixes to bibliographic records and patron records.
- **Suffix Starting Value** – To assign an incrementing suffix to the barcodes in the order they import into the system, type the numeric starting value for these records (for example, type **1**).
- **Suffix Increment By** – If you assign a suffix, type the number of increments you want the records to increase by (for example, **1** increment).

B. If you are importing bibliographic records, the **Duplicates** options are available. Choose one of the following:

- To prevent the import of records that may duplicate existing records, click **Don't allow duplicates**. (All fields in two records need not match for the records to be considered duplicates; for example, two bibliographic records may be considered duplicates if just the ISBN field matches.)
- To import records that may duplicate existing records, click **Allow duplicates.**
- To be prompted when duplicate records are found during the import process, click Prompt if duplicates are found option. This lets you compare the record you are importing to the existing record, and then decide whether to import the duplicate record.

C. If you are importing bibliographic records, the **Holding Records** option is available. If you do not want to generate holding records, clear the **Generate holding records** check box. Otherwise, leave it selected.
D. In the **Unicode** box, you can choose to convert records to Unicode, convert records to MARC8, or not convert records.
E. In the **Default group** list, select the group you want the imported data assigned to by default.
F. If you want to assign a rule to this data, click the **Expand View** button next to **Group Assignment Rule.**

- Select the check box to the left of the first box to activate it. To the right of the box, click the arrow button.
- Enter the rule you want assigned. (Example: Type **852k** under **Field**, select **Equals**, and then type **REF** under **Text**.)
- Click **Add**. Add other rules if desired. When finished, click **Close**.
- In the list to the right of the arrow, select the group to assign records to when they meet the rule criteria. (Example: Select **Reference Collection** to complete the example in step 2.)

10. When finished, click Finish. While the import processes, a progress bar displays. If a duplicate record is found and you selected **Prompt if duplicates** are found in step 9B, the Bibliographic Compare window displays.

Using the four buttons, you have the following choices:

- **Save Existing** – Saves the existing record and does not import the duplicate record. All corresponding holding records are imported. Result: One bibliographic record with all corresponding holding records.

- **Replace Existing** – Imports the duplicate record and replaces the existing record. All corresponding holding records are also imported. Result: One bibliographic record with all corresponding holding records.
- **Import** – Imports the duplicate record and keeps the existing record. All corresponding holding records are also imported and linked to the duplicate bibliographic record. Result: Two bibliographic records and two sets of holdings - the existing bibliographic record and its original holdings, and the duplicate bibliographic record and its corresponding holdings.
- **Do not Import** – Does not import the duplicate record. Result: The bibliographic record and its holding records remain the same.

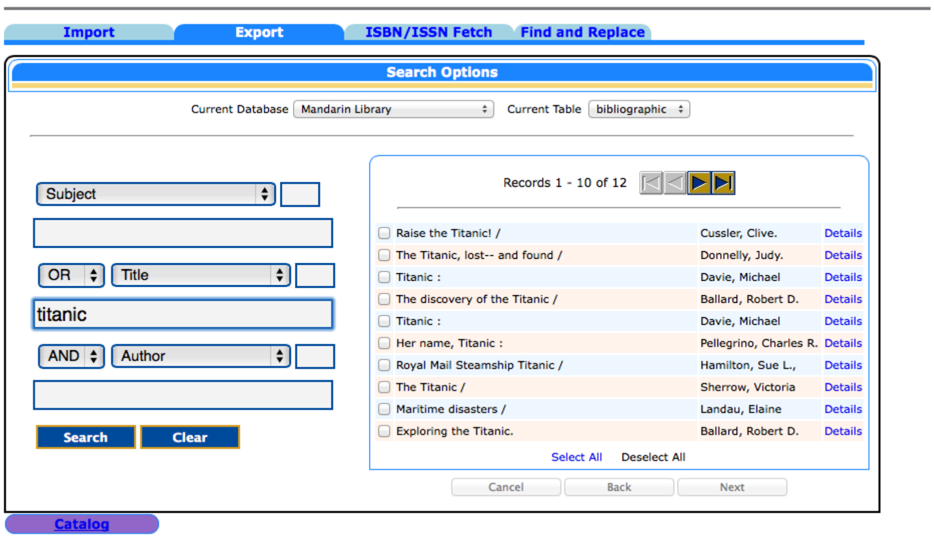
***Tip**: Select the **Don't show this window again** check box before clicking a button to apply the action to the displayed record and all records being imported in this session.*

11. When the import procedure is complete, the import summary displays. Click **OK** to return to the Import page, or click **Print** to print the summary.

Exporting Records

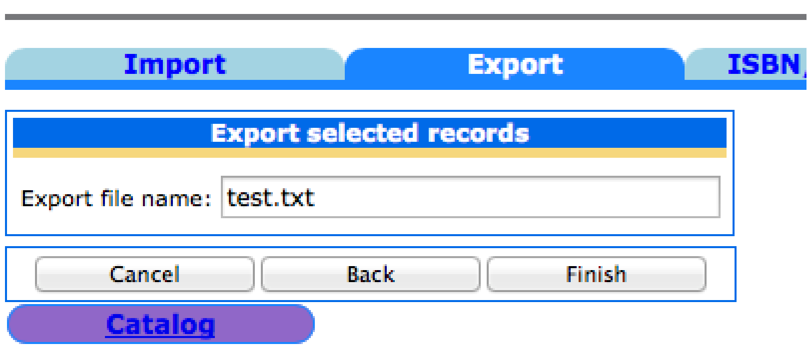
Oasis allows you to export bibliographic records formatted in MARC format.

1. Click the **Cataloging Tools** link in the side menu, click the **Export** tab.
2. In the search form on the left side enter the required information to search for the records to export



3. The selected records will be displayed on the right side. Click the checkboxes to select individual records, or click **Select All,** then **Next.**
4. Enter the export file name and click **Finish.**

***Note**: Always add the **.txt** extension to the file name*



5. Once the export has been finished, the Export summary is displayed. Click the link to download the export file and click the Print link to print the export statistic information.

Export completed

Export started:01/25/14 08:55:56
Export completed:01/25/14 08:55:56

Number of records processed:12
Number of records exported:12

Query to retrieve updated records:KEYWORD=[["005" 20140125205556.0]]

Link to retrieve export file:test.txt

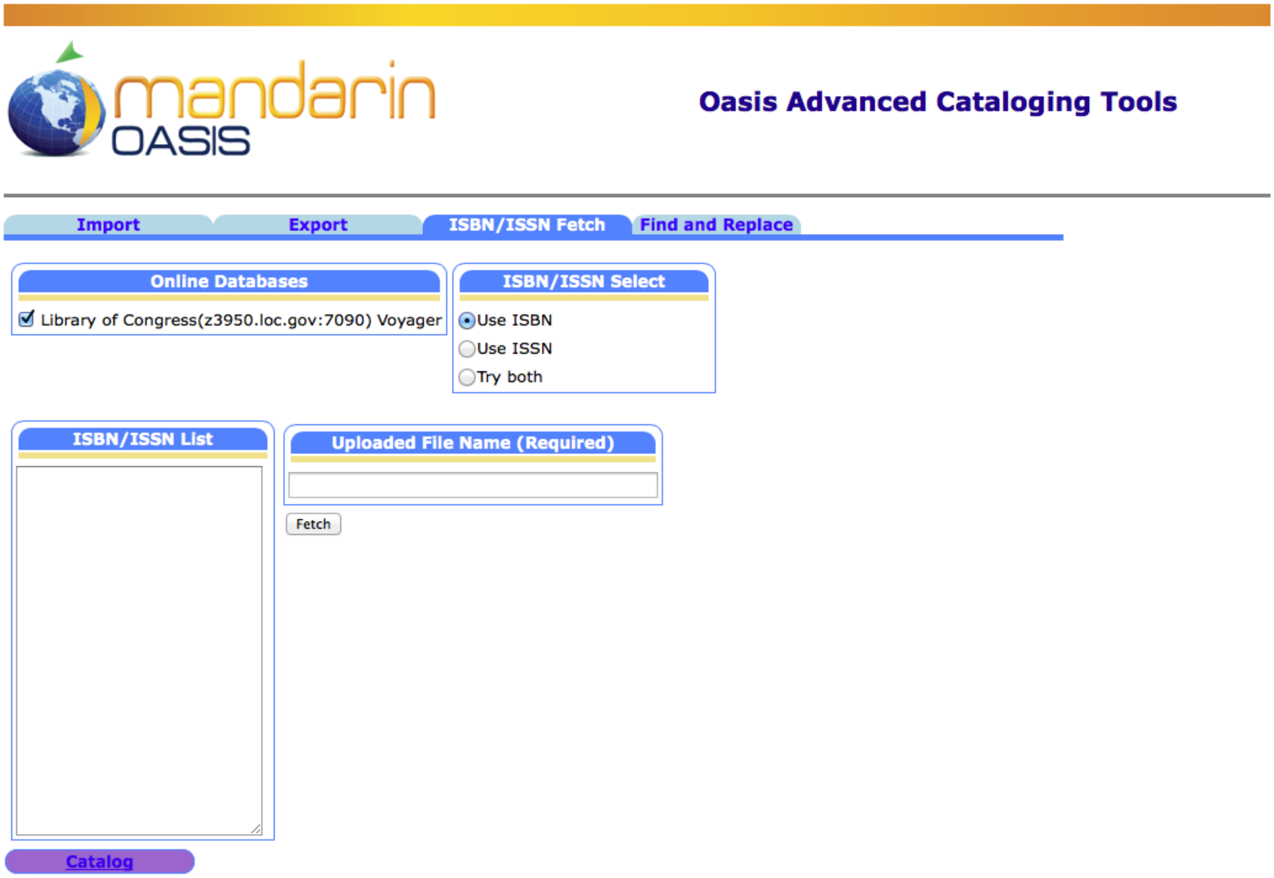
Exceptions
** None **

OK Print

Using ISBN/ISSN Fetch

***Note**: For information on configuring Z39.50 sites, see [Z3950 Searches] under "Configuration".*

This feature allows you to import items from Z39.50 sites by using **ISBNs** or **ISSNs**.
1. Click the **Cataloging Tools** link in the side menu. This displays the Import page.

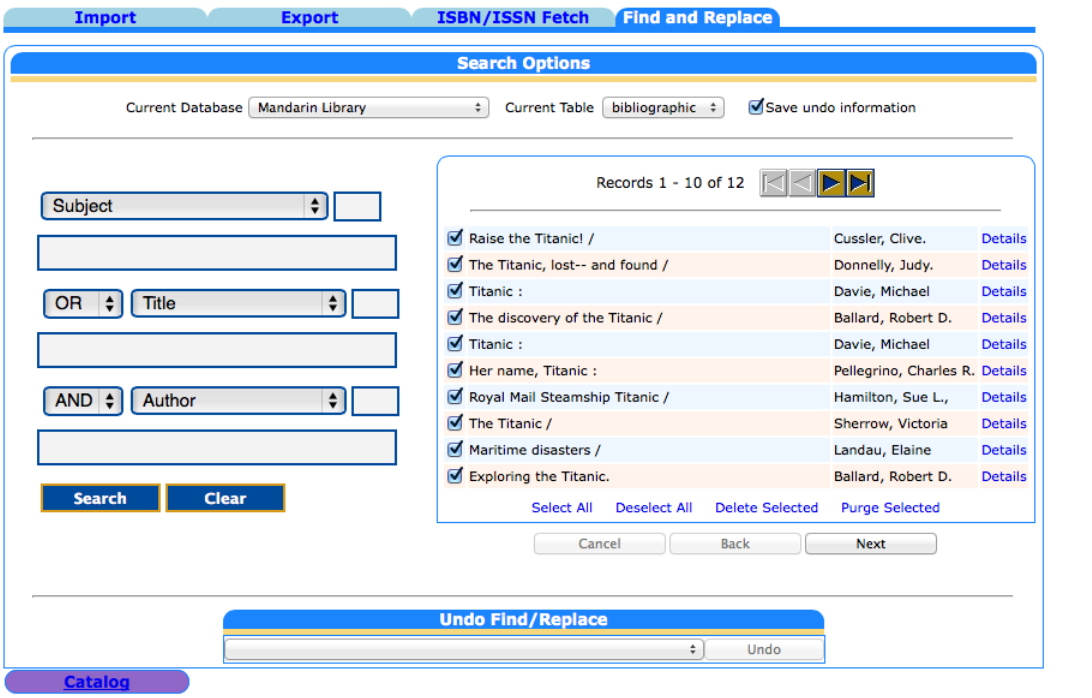


2. Click the **ISBN/ISSN** Fetch tab.
3. In the Online Databases box, select the Z39.50 site(s) you want to search.
4. In the **ISBN/ISSN** Select box, choose whether you want to search by ISBN, ISSN, or both.
5. In the **ISBN/ISSN** List box, enter the ISBNs and/or ISSNs you want to obtain by typing or scanning them into the box.
6. In the **Uploaded File** Name box, type the name you want to assign to the file of ISBNs/ISSNs that are obtained.
7. Click **Fetch**. While the fetch processes, a progress bar displays.
8. Click the **Import** tab. If the import was successful, your file of records will appear in the Uploaded Files list.
9. To import these records, click the Import link next to the file name. This displays the Data Import - Step 1. Follow the instructions in [Importing Records].

Using Find and Replace

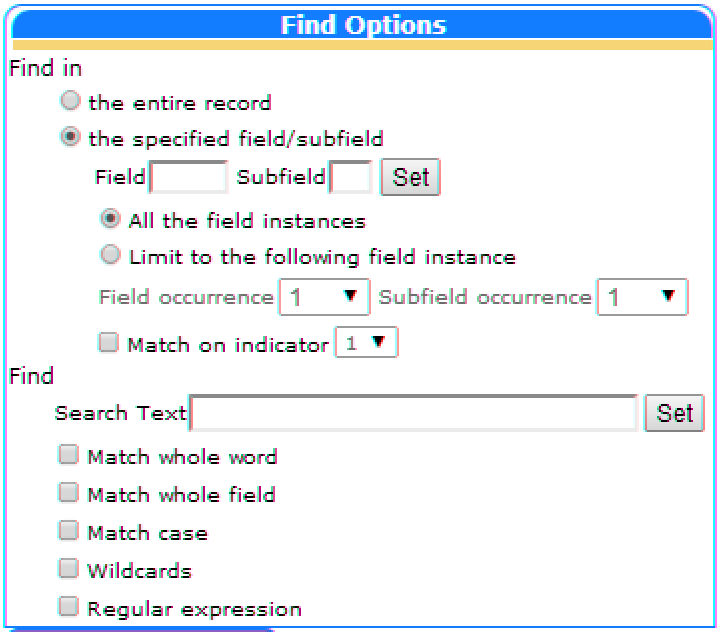
Oasis allows you to do global or partial changes to the database records.

1. Click the **Cataloging Tools** link in the side menu, click the **Find and Replace** tab.
2. At the top, choose the **Current Database** and the **Current Table** (bibliographic, patron, or bib-holding), and check to **Save undo information.**
3. In the search form on the left side enter the required information to search for records to be changed.

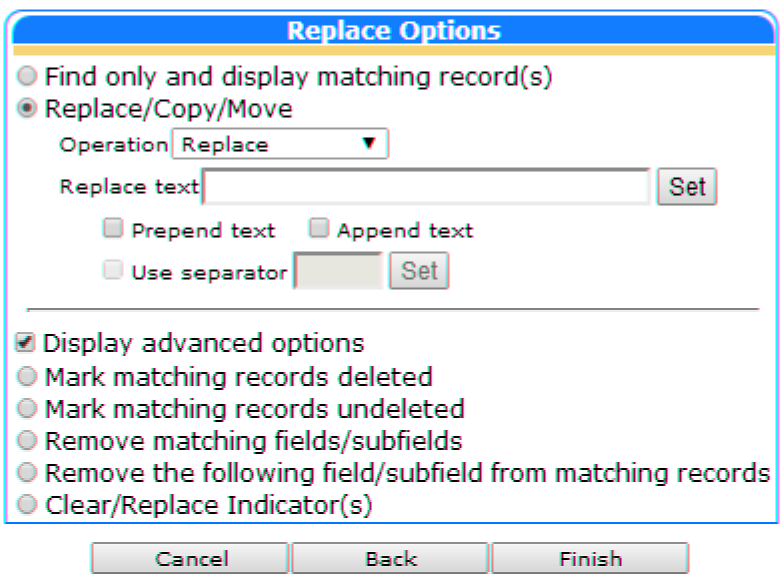


Tip: To create a more specific search, enter MARC field and subfield codes (e.g. 852#k) in the small empty boxes next to the dropdown menus of the search form. Then enter the search criteria in the box below as usual. Information in the small box overrides and ignores the dropdown menu.

4. On the right side you will see the search results as a list of titles and authors. Navigate through the pages of the list with the arrows at the top. To see more information about an individual record, click the Details link on that line.
5. Select individual records by clicking in the checkbox for each, or click on the **Select All** link at the bottom. At this point you can delete and/or purge selected records by clicking on the appropriate links at the bottom of the pane. For other changes, click **Next**.
6. In the **Find Options** box, select either the entire record or a specified field/subfield within each record to locate the information to be changed. In the **Search Text** box enter the information to be changed, and click **Set**. Make any other choices to specifically identify the information to be changed.



7. In the **Replace Options** box, select the function to perform.



8. Click **Finish**. While the operation processes, a progress bar displays.
9. When the replace procedure is complete, the operation summary displays. Click **OK** to return to the **Search Options** page, or click **Print** to print the summary.

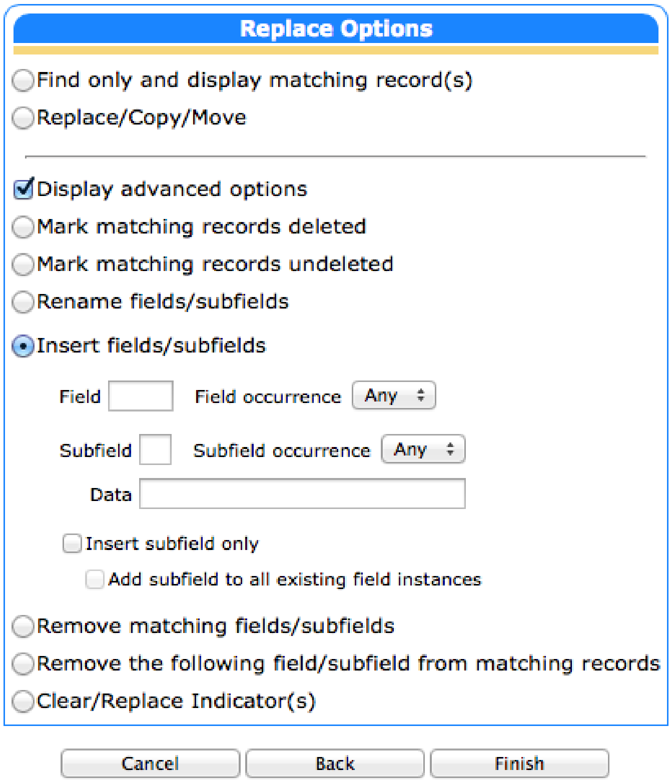
Searched for: john
Number of matches: 2

LDR			cam a2200313 a 4500
001			0000029897
005			20020403204242.0
008			880708s1988 mnua j b 000 1 eng d
010		a	88071722 //r98
035		a	(OCoLC)18829133
040		a	O
		c	O
		d	DLC
042		a	lccopycat
050	0 4	a	PS3558.A44364
		b	R69 1988
082	0 0	a	910/.91634
		2	20
100	1	a	Hamilton, Sue L.,
		d	1959-
		@	0000028705
245	1 0	a	Royal Mail Steamship Titanic /
		c	written by Sue L. Hamilton ; edited by John C. Hamilton.
260		a	Bloomington, Minn. :
		b	Abdo & Daughters ;
		a	Minneapolis, Minn. :
		b	Rockbottom Books [distributor],
		c	c1988.
300		a	32 p. :
		b	ill. ;
		c	26 cm.
440	0	a	The Day of the disaster
		@	0000067962
500		a	A fictional account based on factual data.
500		a	Spine title: R.M.S. Titanic.
504		a	Includes bibliograhical references (p. 32).
520		a	A ship officer's account of the Titanic's last hours.
610	2 0	a	Titanic (Steamship)
		v	Juvenile fiction.
		@	0000067965
650	0	a	Shipwrecks
		z	North Atlantic Ocean
		v	Juvenile fiction.
		@	0000067966
700	1	a	Hamilton, John,
		d	1959-

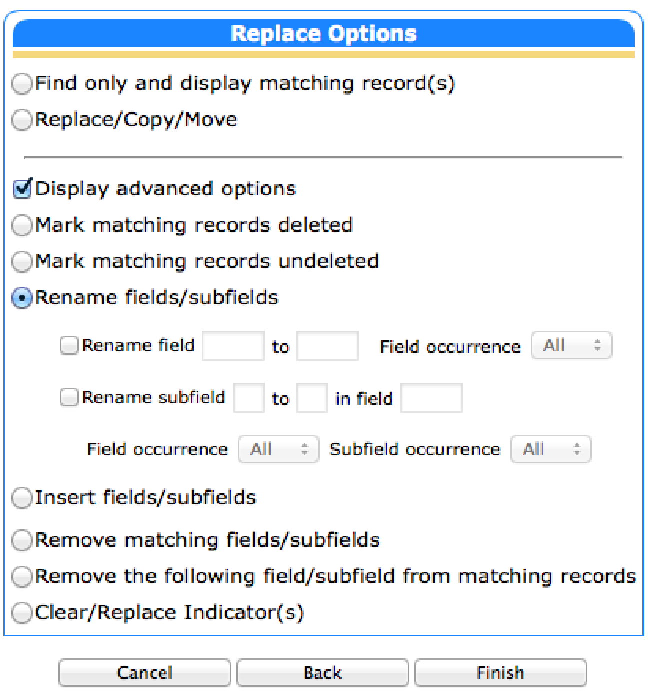
10. On the **Search Options** page you can choose to reverse the procedure if the results were not what you wanted. Choose the appropriate operation from the dropdown menu at the bottom of the page and then click **Undo**.
11. Click the **Catalog** button to return to the main Cataloging screen.

New Features in Release 2.9.3

1. It is now possible to add a field/subfield using Find/Replace.



2. Fields and subfields can now be renamed.



Using Circulation

This chapter describes:

- How to set up the circulation schedule for your library, including closed dates and hours of operation.
- How to conduct circulation transactions, including loans, returns, renewals, reserves and holds, bookings, and fines.
- How to change the system date.
- How to send email overdue, fine and hold notices and print some other simple reports within Circulation

***Note**: Some features described in this chapter may have been disabled by your system administrator, or you may not have permission to access them.*

Signing In to Circulation

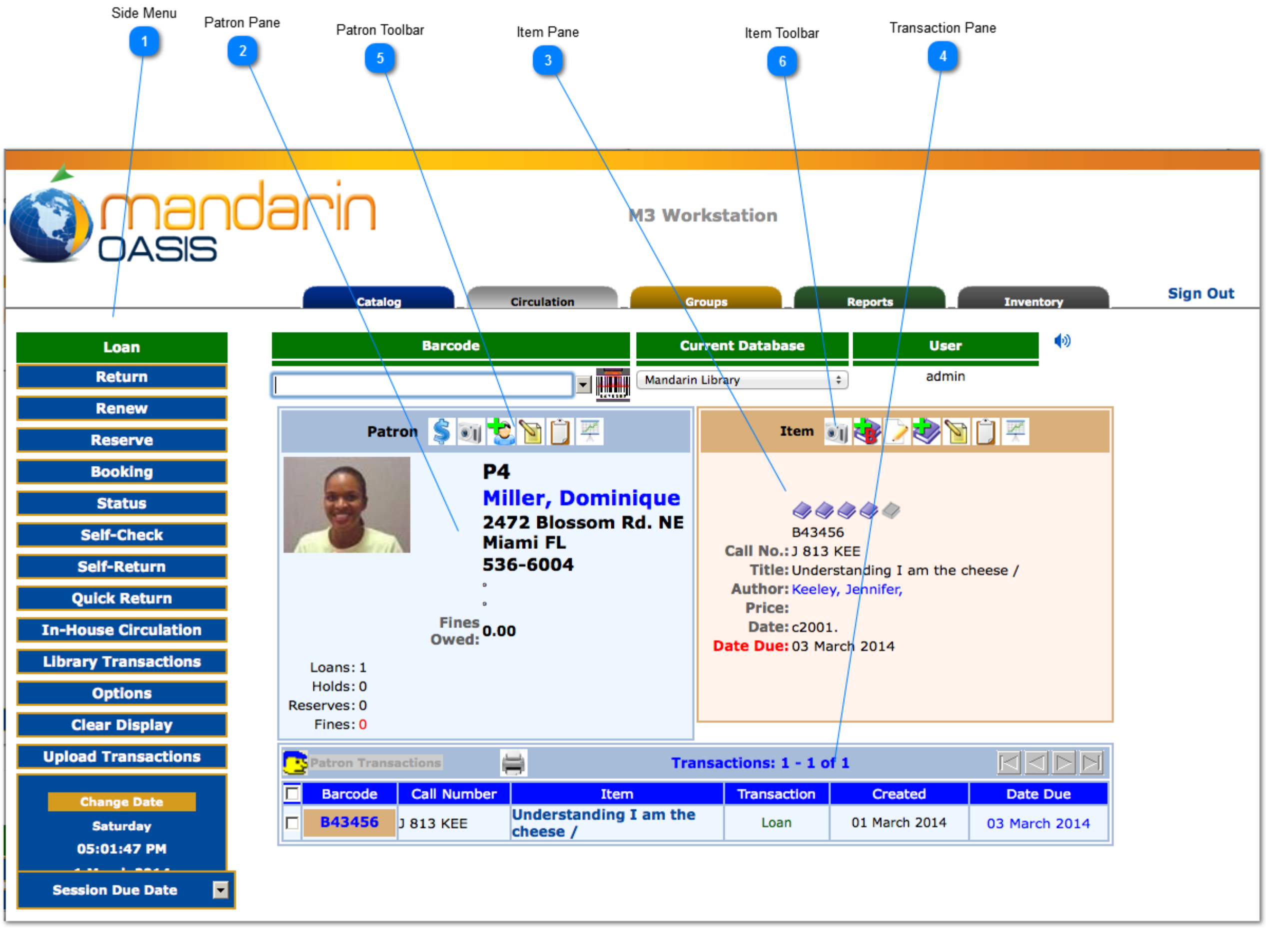
In order to use Circulation, you must sign in to the Catalog with the appropriate permissions.

1. Click the **Sign In** link that appears in the upper right corner of the Catalog.
2. Type your login name in the **Login Name/Barcode** box.
3. In the **Password** box, type your password.
4. Click **Sign In**. Oasis displays the tabs for all library functions that you have permission to access.
5. Click the **Circulation** tab at the top of the page.

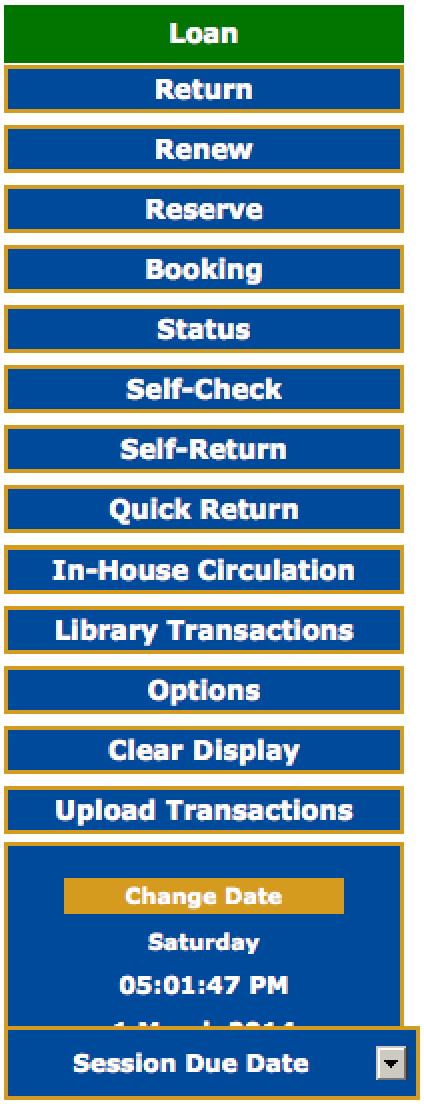
New Features in Release 2.9.3

Clicking the Circulation tab from anywhere within Circulation will take the user to the initial Circulation page.

Circulation Features



1 Side Menu

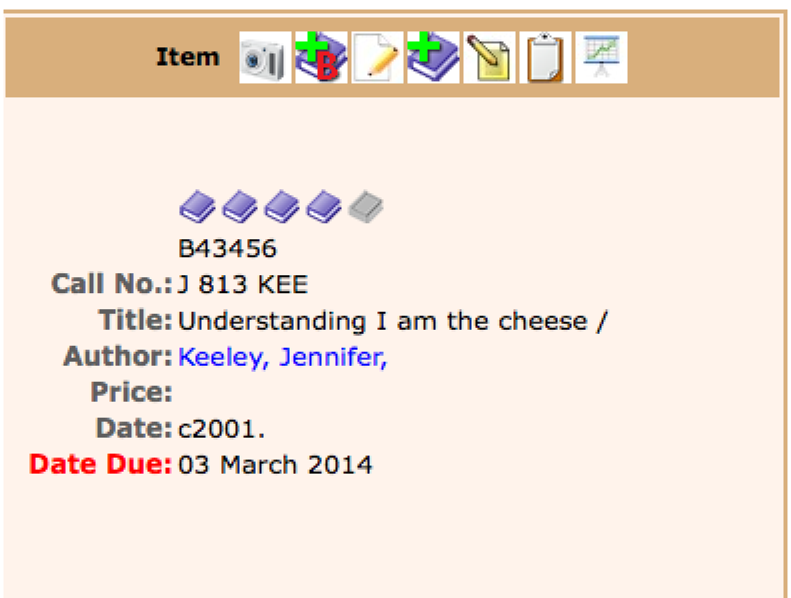


Circulation side menu – Contains options for conducting transactions, configuring the schedule, clearing the display, and changing the system date.

2 Patron Pane

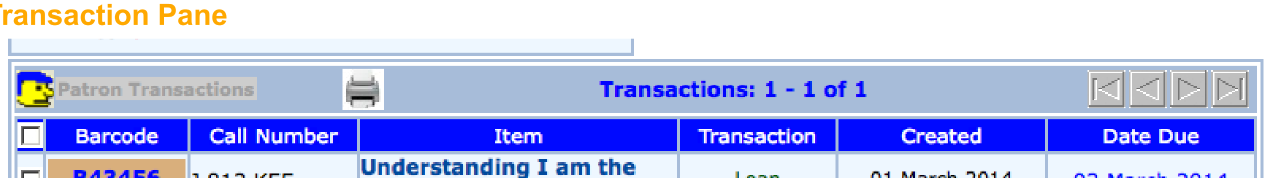
Patron pane – Displays information about the selected patron. The type of information displayed in this pane is based on the type of institution, but typically contains data such as the patron name, ID number, address, phone number, and current transaction statistics.

3 Item Pane



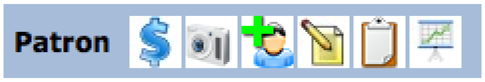
Item pane – Displays information about the selected item. This pane typically contains data such as the call number, title, author, and current transaction information.

4 Transaction Pane



5

Patron Toolbar



The **Patron Toolbar** allows you to apply Payments, Attach/Modify Picture, Create New Patron Record, Edit Patron Record, Attach Message, Display Patron History. If the word **Patron** is underlined to indicate a link, it allows quick viewing of all the patron records (patron, barcode, group, etc.) for the current patron in Full MARC format.

6

Item Toolbar

The **Item Toolbar** allows you to Attach/Modify Picture, Create New Bibliographic Record, Edit Bibliographic Record, Create New Holding Record, Edit Holding Record, Attach Message, Display Item History. If the word **Item** is underlined to indicate a link, it allows quick viewing of all the item records (holding, bib, barcode, group, etc.) for the current item in Full MARC format.

Setting Up the Schedule

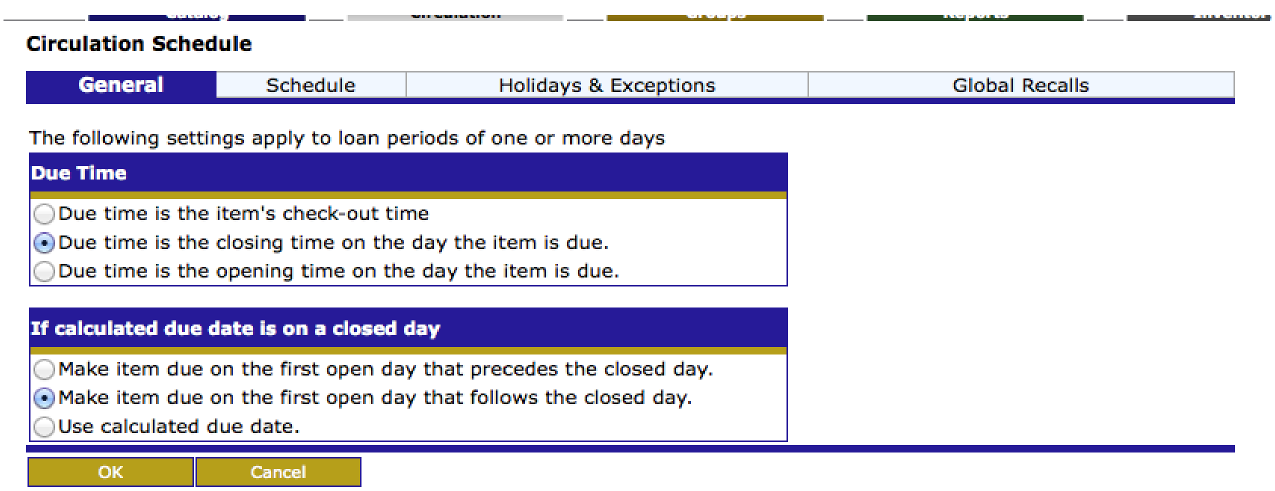
Before using Circulation, you should set up your library's system schedule. You can set up multiple schedules to accommodate different times of the year. For example, your summer schedule may differ from the rest of the year.

To set up your library circulation schedule:
On the side menu, click **Options.** On the **Circulation Options** page click the button for **Schedule**. This displays the Circulation Schedule page with four tabs. Enter the appropriate information in each tab as described in the following sections.

General Tab

In this tab, establish general loan period rules.

1. Under **Due Time**, click the option appropriate for your library.
2. Under **If calculated due date is on a closed day**, click the option appropriate for your library.
3. When finished, click the **Schedule** tab.



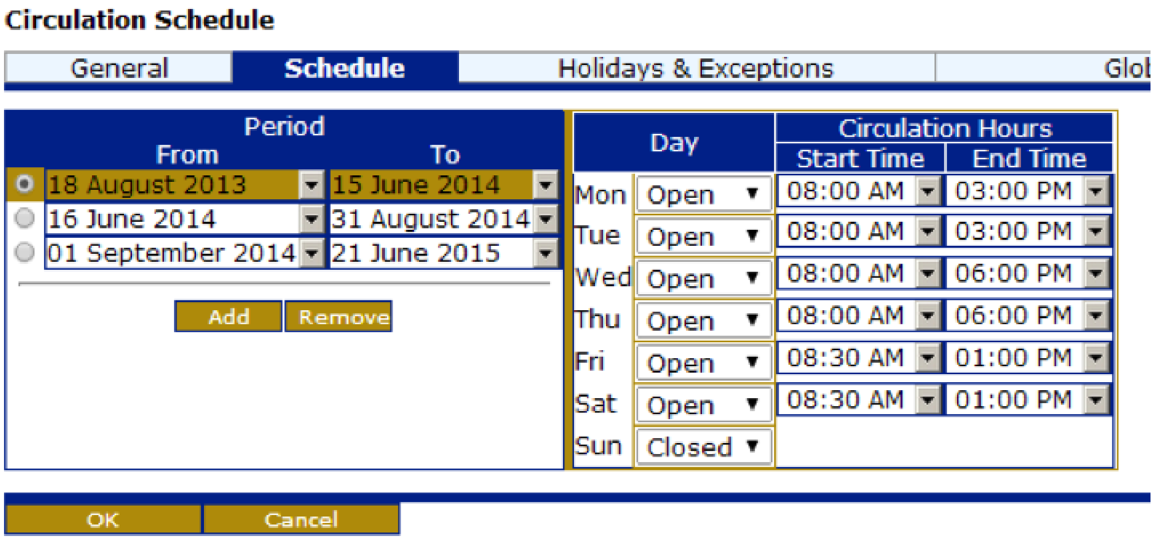
Schedule Tab

In this tab, establish periods and indicate your library's open and closed days. You can create multiple schedules to apply to different times of the year.

1. Under **Period**, specify this schedule's starting date and end date. To do so, click **Add**. This enters a new line. Modify the **From** and **To** dates by clicking the date arrows and selecting the desired dates in the calendar.
2. Under **Day**, click the **Mon** arrow, and then click **Open** or **Closed**. Repeat for all days of the week.
3. Under **Circulation Hours**, select the **Start Time** and **End Time** for each day of the week that you are open. To do so, click a time arrow and select the time.

NOTE: If you want to create an additional schedule period, wait until you have completed the Holidays & Exceptions tab and the Global Recalls tab for this schedule period.

4. When finished, click the **Holidays & Exceptions** tab. or click OK to return to the **Circulation Options** page and then **Close** to return to the main Circulation page.



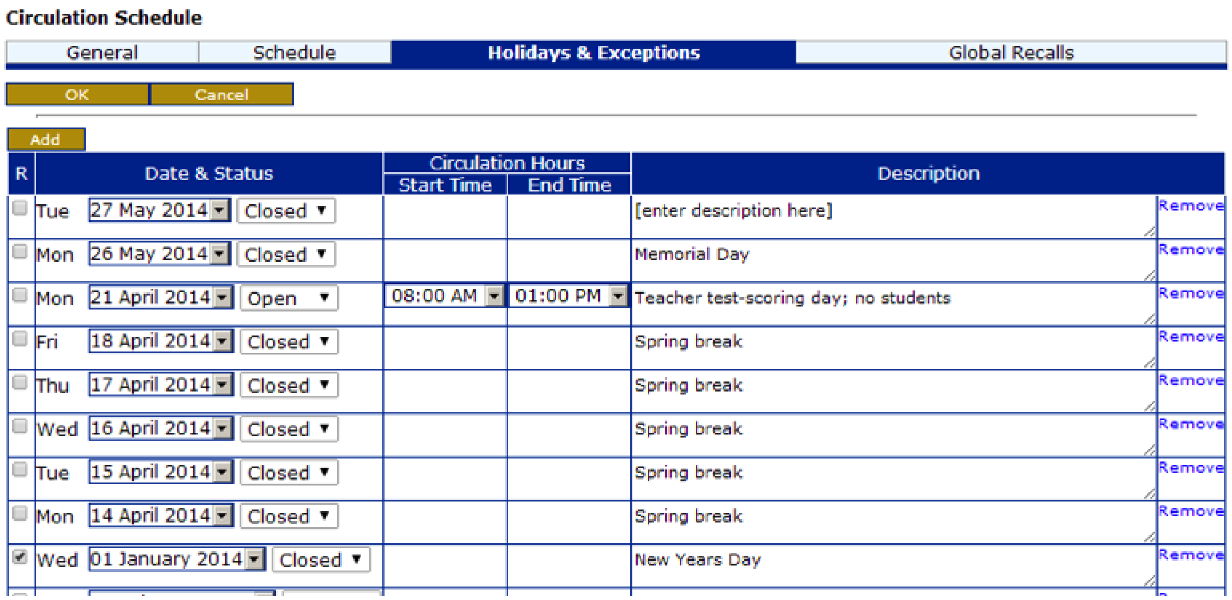
Holidays & Exceptions Tab

In this tab, eliminate or add irregular dates within the schedule you created in the Schedule tab.

1. Click **Add**. This enters a new line.
2. Enter information for the exception date as follows:

    A. Select the **R** check box if this exception date should repeat every year. This would be appropriate for holidays that always occur on the same date each year, such as New Year's Day.
    B. In the date box under **Date & Status**, enter the exception date by clicking the date arrow and selecting the desired date in the calendar.
    C. In the box beside the date box, select **Open** or **Closed** to indicate whether the library is open or closed on the date entered in step B.
    D. If you selected **Open** in step C, enter the **Start Time** and **End Time** for this exception day by clicking a time arrow and selecting the time. If you clicked **Closed** in step C, no times can be entered.
    E. In the **Description** box, type any information necessary to clarify this exception date.

3. To enter more dates, click **Add** and repeat step 2.
4. When finished, click the **Global Recalls** tab. or click OK to return to the **Circulation Options** page and then **Close** to return to the main Circulation page.

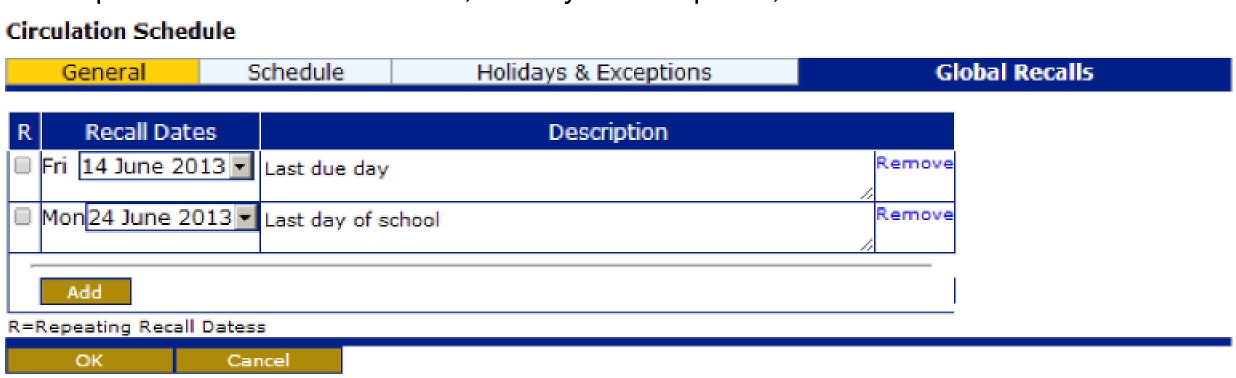


Global Recalls Tab

In this tab, specify the date all items have to be back in the library, such as the end of a school term or an inventory date.

1. Click **Add**. This enters a new line.
2. Enter information for the closing date as follows:
   - A. Select the **R** check box if this closing date should repeat every year.
   - B. Under **Recall Dates**, enter the closing date by clicking the date arrow and selecting the desired date in the calendar.
   - C. In the **Description** box, type any text necessary to clarify this closing date.
3. To enter more dates, click **Add** and repeat step 2.
4. When finished, click **OK**. to return to the **Circulation Options** page and then **Close** to return to the main Circulation page.

5. If you want to add another circulation period (such as a "summer hours" schedule), repeat the procedures for the Schedule, Holidays & Exceptions, and **Global Recalls** tabs.

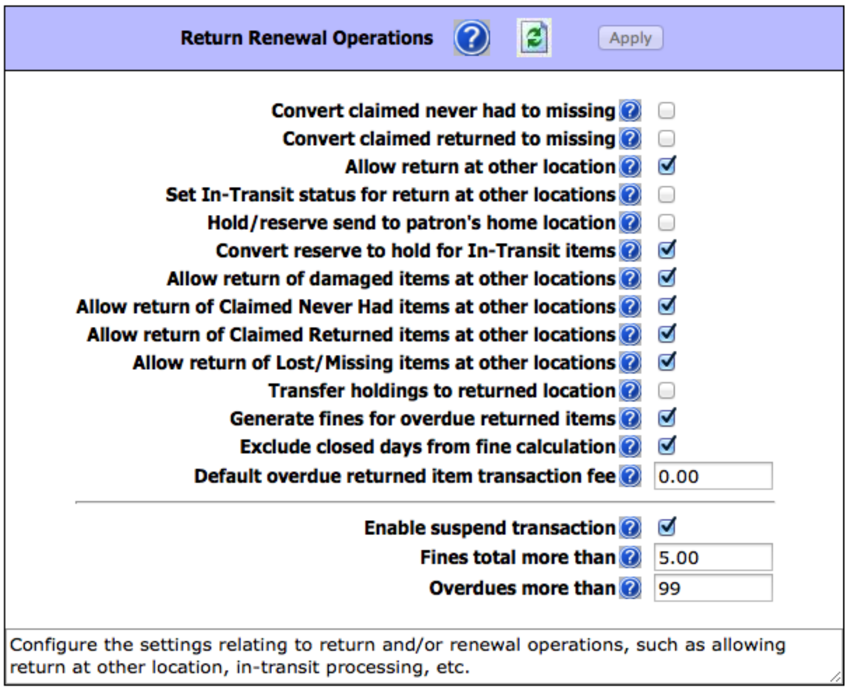


Circulation Options

Several configuration options are available to customize Circulation. Default options are good enough for most users. To change the Circulation options click the **Expand** button located on top of each group. Click **Apply** after a change has been done. Click **Close** to return to the main Circulation screen.

Return Renewal Operations

To change the settings having to do with Returns and Renewals, click the **Expand** button located on top of the group. Click **Apply** after a change has been done, then click **Close** to return to the main Circulation screen.

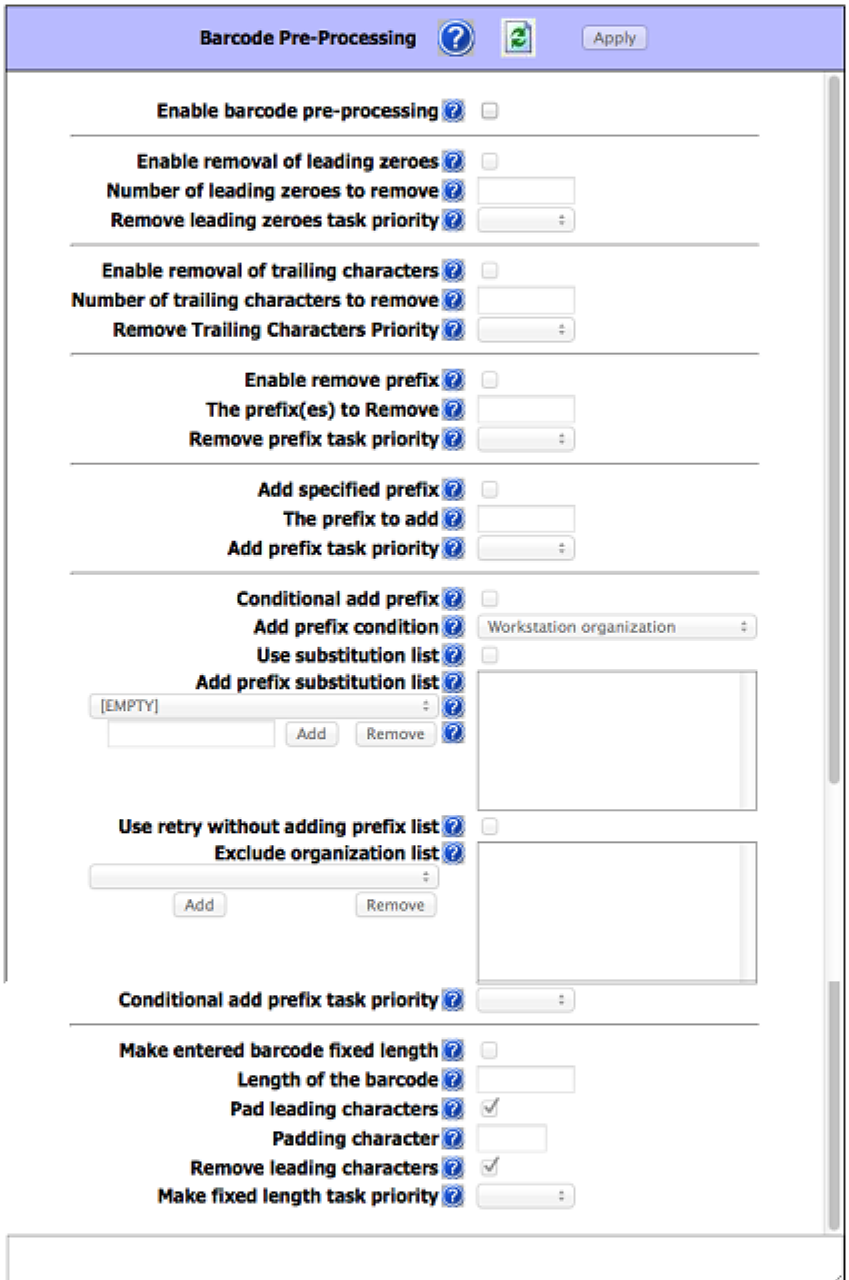


Return Renewal Operations	**Configure the settings relating to return and/or renewal operations, such as allowing return at other location, in-transit processing, etc.**
Convert claimed never had to missing	Select this option to convert the status to MISSING for Items patrons claimed they never had. If this is unchecked, Claimed Never Had items are returned to a NORMAL, available status.
Convert claimed returned to missing	Select this option to convert the status to MISSING for Items patrons claimed they returned. If this is unchecked, Claimed Returned items are returned to a NORMAL, available status.
Allow return at other location	Enables accepting return of items belonging to other libraries (organizations) in a union catalog (scoped) setting.
Set In-Transit status for return at other locations	If enabled, items returned at other locations will have their status set to In-Transit while the item is being sent to the owning organization in a union catalog (scoped) setting.
Hold/reserve send to patron's home location	For items returned at other locations in a union catalog (scoped) setting, if there are holds/reserves the items will have their status set to In-Transit while the item is being sent to the patrons' home locations.
Convert reserve to hold for In-Transit items	If selected, for items returned at other locations in a union catalog (scoped) setting, reserves are converted to holds when the In-Transit items are received at to the patrons' home locations.
Allow return of damaged items at other locations	Check this option to allow return of Damaged items at other locations in a union catalog (scoped) setting.

Allow return of Claimed Never Had items at other locations	Check this option to accept return of Claimed Never Had items at other locations in a union catalog (scoped) setting.
Allow return of Claimed Returned items at other locations	Check this option to accept return of Claimed Returned items at other locations in a union catalog (scoped) setting.
Allow return of Lost/Missing items at other locations	Check this option to accept return of Lost/Missing items at other locations in a union catalog (scoped) setting.
Transfer holdings to returned location	Items returned at other locations in a union catalog (scoped) setting will be transferred to the returned locations. Returned location will become the home/owning location.
Generate fines for overdue returned items	Turns on/off generation of fines for returned overdue items.
Exclude closed days from fine calculation	Exclude from the fine calculation the days the library is closed during the given loan period.
Default overdue returned item transaction fee	This late fee is added to all overdue returned items on top of any calculated overdue fine amount.
Enable suspend transaction	Enable suspend transaction if patron's fines amount or overdue transaction count exceeds the preset amount.
Fines total more than	Suspend transaction if the patron's fines amount exceeds this amount.
Overdues more than	Suspend transaction if the patron's overdue transaction count exceeds this amount.

Barcode Pre-Process

To change the settings for pre-processing barcodes, click the **Expand** button located on top of the group. Click **Apply** after a change has been done, then click **Close** to return to the main Circulation screen.



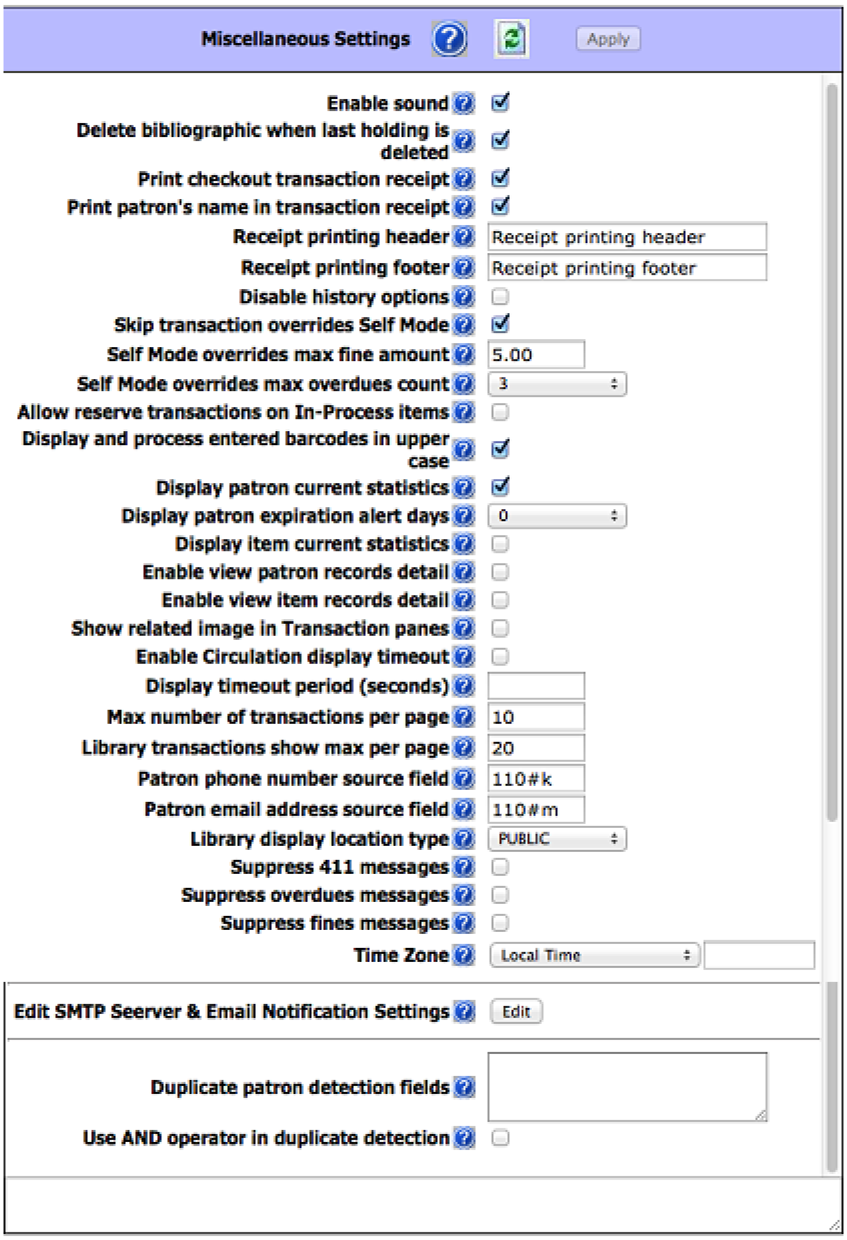
Barcode Pre-Processing	**These settings instruct Circulation how to massage the raw barcode string into the desire form before submitting the query to the server.**
Enable barcode pre-processing	Enable the pre-processing of the raw entered barcodes before querying the server. Often used to add/remove characters due to scanners' peculiarities.

Enable removal of leading zeroes	Enable removing leading zeroes from the entered raw barcodes.
Number of leading zeroes to remove	Maximun number of leading zeroes to remove from the raw entered barcode. Enter 0(zero) to remove all leading zeroes.
Remove leading zeroes task priority	The task priority (1-6) is the order in which removal of the leading zeroes will take place.
Enable removal of trailing characters	Enable removing trailing characters from the entered raw barcodes.
Number of trailing characters to remove	The number of trailing characters to remove from the entered barcode.
Remove Trailing Characters Priority	The task priority (1-6) is the order in which the removing of trailings characters will take place.
Enable remove prefix	Enable removing prefixes from the entered raw barcodes.
The prefix(es) to Remove	Enter one or more prefixes (separated with by semicolons(;) to be removed from the entered barcodes
Remove prefix task priority	The task priority (1-6) is the order in which the prefix removal will take place.
Add specified prefix	Add the specified prefix to all entered barcodes.
The prefix to add	Enter here the prefix to add to the barcodes.
Add prefix task priority	The task priority (1-6) is the order in which the adding of the prefix will take place.
Conditional add prefix	Add a prefix to the barcode based on the current user or workstation organization symbol. In addition, a A substitution list can also be provided.
Add prefix condition	Use either the user or workstation organization symbol as the prefix or as the condition for substitution.
Use substitution list	Enables getting taking the prefix text from the substitution list. For any symbol matching the condition, add the corresponding prefix text.
Add prefix substitution list	The list of organization symbols and the corresponding prefixes. Select an Organization, enter prefix text and click on **Add**.
(EMPTY)	To force a prefix for user or workstation with empty organization symbol, select [EMPTY] and specify the prefix.
(**Add**) (**Remove**)	To exclude an organization from adding a prefix, select the organization and set the prefix to one or more blank spaces.
Use retry without adding prefix list	Re-try without adding prefix for those organizations in the list if fetching barcode fails.
Exclude organization list	The list of organizations to retry without adding the prefix if fetching the barcode fails.
Conditional add prefix task priority	The task priority (1-6) is the order in which the conditional addition of the prefix will take place.
Make entered barcode fixed length	Make all entered barcodes of a fixed length by padding or removing characters as configured.
Length of the barcode	The number of characters to make the entered barcodes.
Pad leading characters	Make the barcodes a fixed length by padding the leading characters. Otherwise pad trailing characters.
Padding character	The character to be used to pad the barcodes when the entered barcodes are shorter than the required length.
Remove leading characters	Make the barcodes a fixed length by removing the leading characters. Otherwise remove trailing characters.

Make fixed length task priority	The task priority (1-6) is the order in which the making the barcodes a fixed length will take place.

Miscellaneous Settings

To change the settings within this group, click the **Expand** button located on top of the group. Click **Apply** after a change has been done, then click **Close** to return to the main Circulation screen.



Miscellaneous Settings	Provides many options to enhance Circulation customization.
Enable sound	Enable playing sound file at the end of each operation.
Delete bibliographic when last holding is deleted	Delete the bibliographic record when the last attached holding record is deleted.
Print checkout transaction receipt	Enables printing receipt for loan transactions.

Print patron's name in transaction receipt	Enables printing the patron's name when printing receipts. Otherwise the name is masked.
Receipt printing header	The header to print on the receipt. Leave blank if no header is desired.
Receipt printing footer	The footer to print on the receipt. Leave blank if no footer is desired.
Disable history options	Checking this option will disable the history menu options for both patron and item.
Skip transaction overrides Self Mode	Skip transaction overrides in Self Mode. Overrides are NOT waived, instead the transactions are cancelled.
Self Mode overrides max fine amount	This is the maximum fine amount the patron may owe before blocking the transactions in Self Mode when the skip override flag is off.
Self Mode overrides max overdues count	This is the maximum number of overdue loans the patron may have before blocking the transactions in Self Mode when the skip override flag is off.
Allow reserve transactions on In-Process items	Allow reserve transactions on items with In-Process status.
Display and process entered barcodes in upper case	Display and process entered barcodes in upper case.
Display patron current statistics	Display the patron current statistics (number of items currently on loan, on hold, on reserve, fines, etc.)
Display patron expiration alert days	The number of days before the patron expiration date to display notification alert notice.
Display item current statistics	Display the item current statistics (number reserves, bookings, fines, etc.)
Enable view patron records detail	Enables the option to view all the patron records (patron, barcode, group, etc.) in Full MARC format.
Enable view item records detail	Enables the option to view all the item records (holding, bib, barcode, group, etc.) in Full MARC format.
Show related image in Transaction panes	Show the related image in the transaction panes. Patron pictures display for item transactions and book covers for patron transactions.pane.
Enable Circulation display timeout	Clears the Circulation display after a specified timeout period of inactivity.
Display timeout period (seconds)	The number of seconds of inactivity necessary to clear the display.
Max number of transactions per page	Maximum number of transactions to display in the transaction pane at once. Paging will occur if exceeded. Default is 10.
Library transactions show max per page	Maximum number of transactions to display in the Library Transactions pane at once. Paging will occur if exceeded. Default is 20.
Patron phone number source field	The field in the patron record that Circulation uses to retrieve the patron phone number.
Patron email address source field	The field in the patron record that Circulation uses to retrieve the patron email address for email notifications.
Library display location type	The library display location type (PUBLIC or SCHOOL library) can be used to restrict displaying sensitive information.
Suppress 411 messages	Disable displaying of information (411) messages when a patron is loaded.
Time Zone	Select the time zone for your location. Enter user defined time zone as: GMT+HH:MM or GMT-HH:MM.
Email service type for notification	The type of email service to use for notification. Currently only SMTP service is supported.

Email server IP address	The IP address of the email server to be used for email notifications.
Email server port	The listening port of the email server. Default value is port 25.
Sender email address	The email address of the sender. The email address that will be used in the FROM field of the email notifications.
Email address to furnish copy to	The email address to furnish copy of email notifications. The email address that will be used in the CC field of the email notifications.
Authenticate	Check this option if your email server requires authentication.
User:	Enter the SMTP account user name.
Password:	Enter the SMTP account user password.
Duplicate patron detection fields	One or more fields separated with slash(/) used in the auto import to detect duplicate patron records. Default field is 852#p.
Use AND operator in duplicate detection	For multiple duplicate detection fields use AND to require matching on every field. Otherwise matching on any of the fields.

Conducting Transactions

From the main Circulation page, you can view patron and item status, loan items, return items, renew items, reserve and hold items, book equipment and rooms, process fines, configure the schedule, and change the system date. Procedures are explained in the following sections.

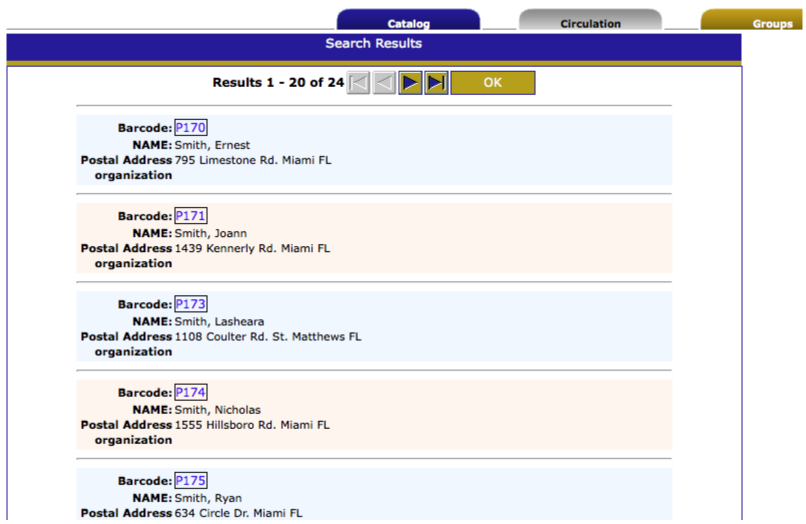
Selecting a Circulation Database

Your Oasis system may offer several databases from which you can circulate items. If so, you can select a different database in the **Current Database** list at any time.

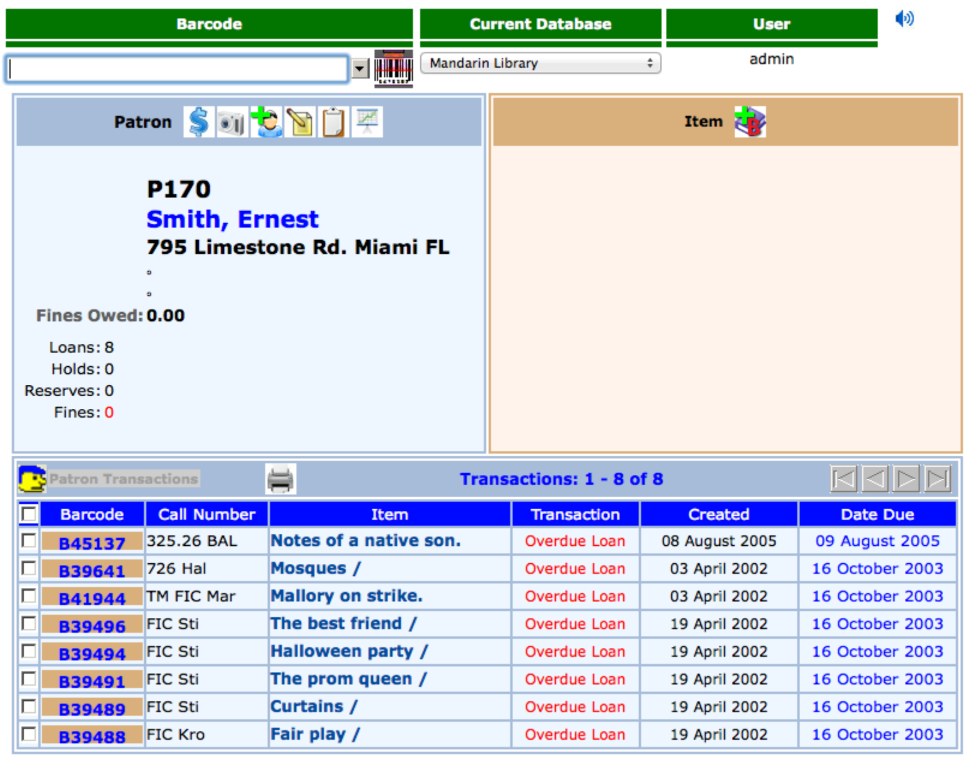
Searching for Item or Patron

NOTES:
• If you are searching for an item in Loan, Reserve, or Booking mode, there should be an active patron in the Patron pane.
• If you are searching for a patron in Loan, Reserve, or Booking mode, and another patron already appears in the Patron pane, click Clear Display in the side menu to clear the pane before searching by this method.

1. In the Barcode box, type a patron or item name, then press **ENTER**. This displays the Search Results page.



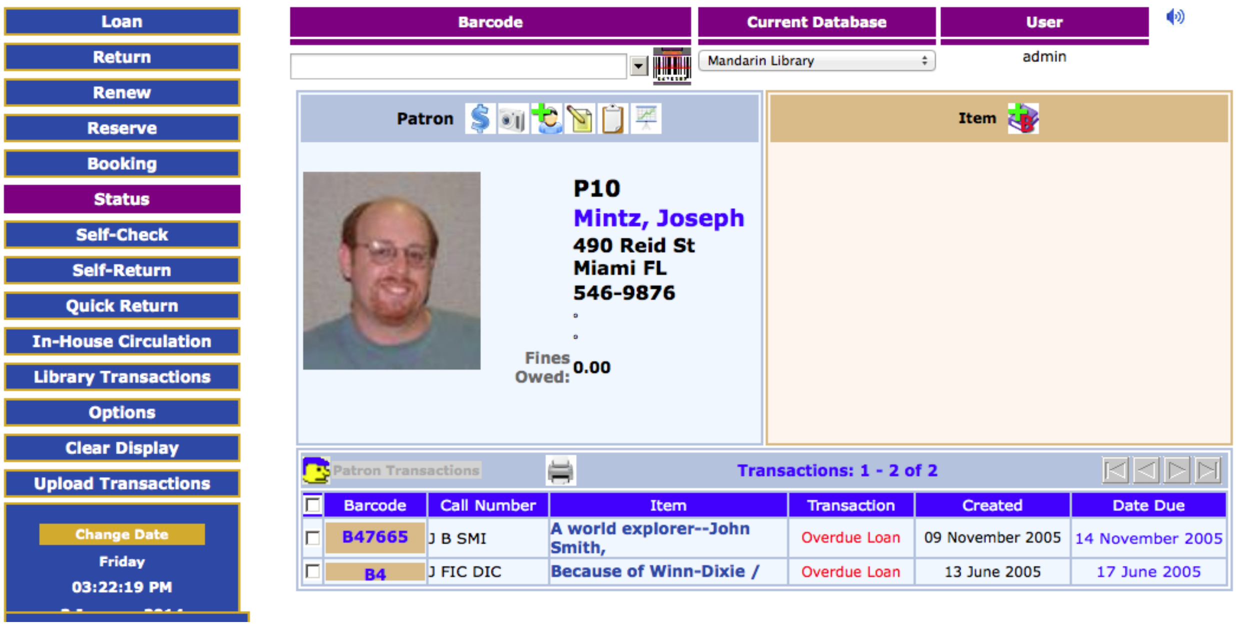
2. Click the desired patron or item barcode. This returns you to the main Circulation page and displays the patron or item.



Barcode	Call Number	Item	Transaction	Created	Date Due
B45137	325.26 BAL	Notes of a native son.	Overdue Loan	08 August 2005	09 August 2005
B39641	726 Hal	Mosques /	Overdue Loan	03 April 2002	16 October 2003
B41944	TM FIC Mar	Mallory on strike.	Overdue Loan	03 April 2002	16 October 2003
B39496	FIC Sti	The best friend /	Overdue Loan	19 April 2002	16 October 2003
B39494	FIC Sti	Halloween party /	Overdue Loan	19 April 2002	16 October 2003
B39491	FIC Sti	The prom queen /	Overdue Loan	19 April 2002	16 October 2003
B39489	FIC Sti	Curtains /	Overdue Loan	19 April 2002	16 October 2003
B39488	FIC Kro	Fair play /	Overdue Loan	19 April 2002	16 October 2003

Viewing Patrons and Items

1. In the side menu, click **Status**.
2. In the **Barcode box**, scan the patron or item barcode, or type it and then press **ENTER**. This displays a record in the Patron or Item pane, depending upon the type of code you entered. If there are any open transactions for this patron or item, they display under Transactions.
3. To view the status of another patron or item, enter a different barcode in the Barcode box.



To view the Patron and Item Toolbar see Circulation Features

Loaning Items

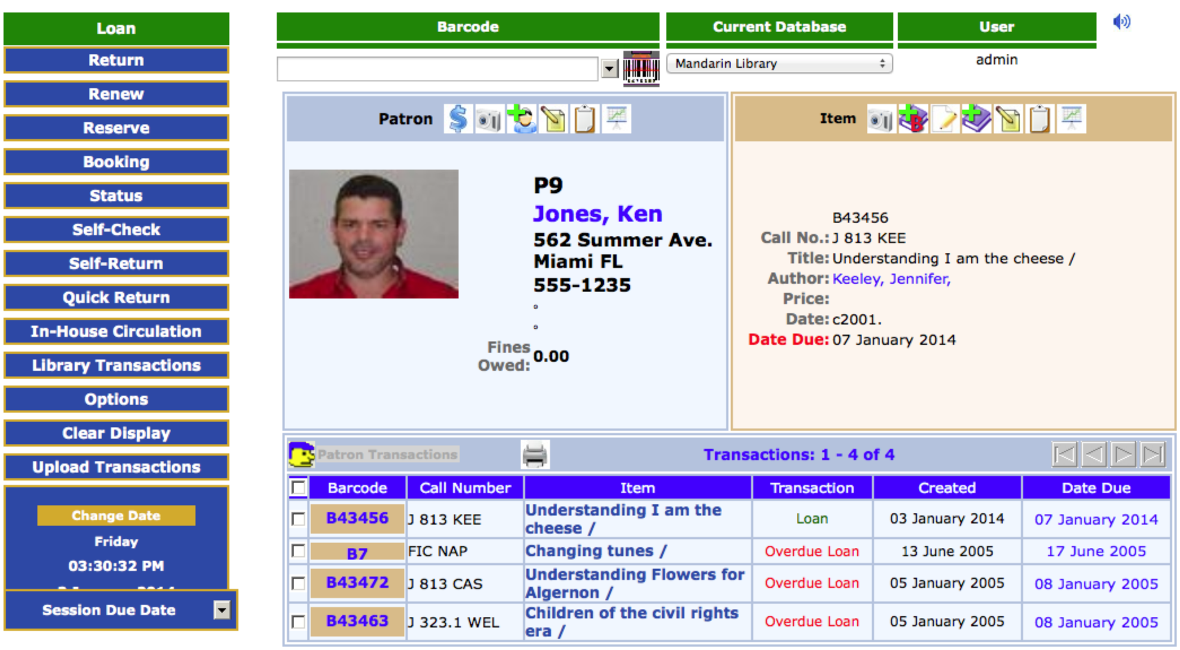
1. In the side menu, click Loan.
2. In the **Barcode** box, scan the patron barcode, or type it and then press **ENTER**.

NOTES:

- *If your library has not yet established a circulation schedule, an error message displays. For information on establishing a circulation schedule, see [Setting Up the Schedule].*
- *If any patron record has an overdue item or a fine associated with it, a system message displays. You can click Override to ignore the message and continue with the transaction, or click Cancel to stop the transaction.*

3. In the **Barcode** box, scan the item barcode, or type it and then press **ENTER**. The loan is processed, the item information appears in the Item Pane, and the transaction appears in the Transaction Pane.

4. To loan more items to this patron, scan the next item barcode in the Barcode box, or type it and then press **ENTER**. Repeat this process for each item loaned to this patron.



5. A transaction receipt may be printed if a receipt printer is connected to the circulation workstation and the appropriate settings are selected in **[Circulation Settings]**.

Dewey Central Library

Dewey Central Library
17 Feb 2014 04:08 pm

LIBRARY RECEIPT
CHECKOUT

P200
NAME: Summers, Jerry

DCL98654
Due: 03 March 2014 04:06 pm
The burning sky /

Returning Items

Notes:
• If an item is returned that belongs to a special reserve group, a warning message displays.

• When a reserved item is returned, a message displays indicating the name and barcode of the patron who reserved it.

Circulation provides five methods to return items.

• **Side menu method** – Used to return items one at a time by entering each barcode.
• **Transactions menu method** – Used to return one or many items at once using a menu under Transactions. See Using the Transactions Menu.
• **Quick Return method** – Used when scanning bookdrop returns without patrons present.
• **In-House Circulation method** – "Returns" items left on tables and desks after in-library use. See In House Circulation.
• **Self-Return method** – Allows patrons to check out or return items without staff assistance. See "Using Self-Return".

Side Menu Method

1. In the side menu, click **Return**.
2. In the Barcode box, scan the item barcode, or type it and then press **ENTER**. This returns the item. Repeat for each item you want to return.

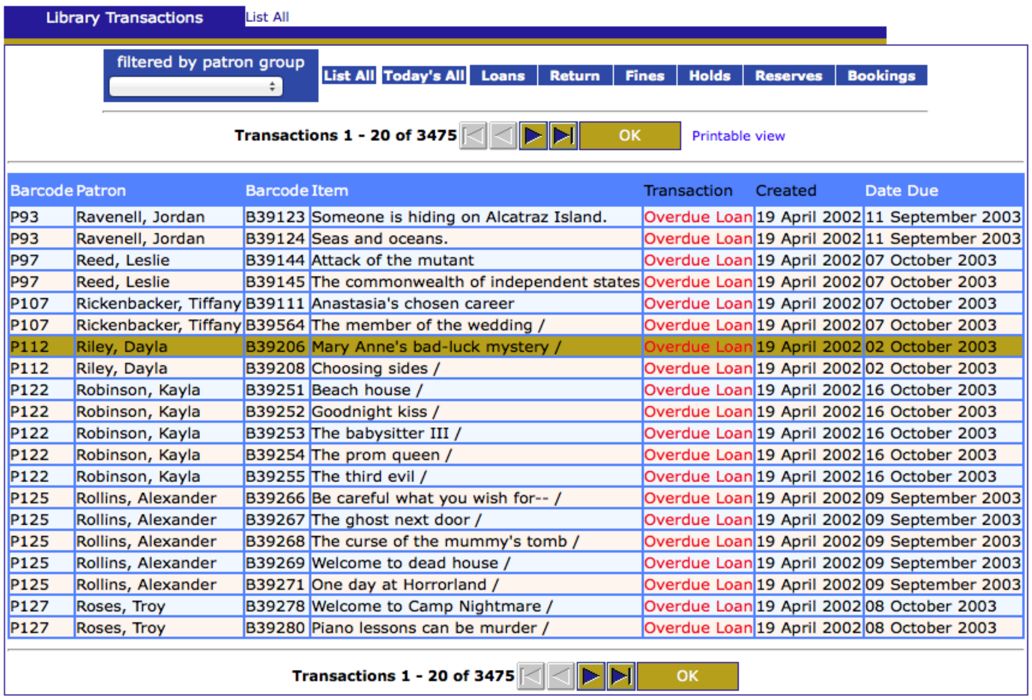
Quick Return

This rapid entry method is designed for situations such as bookdrop returns. Quick Return does not alert you to patron messages since it is assumed that patrons are not present. Quick Return does alert you when a Hold is attached to an item.

1. In the side menu, click **Quick Return**.
2. In the Barcode box, scan the item barcode, or type it and then press ENTER. Repeat this for each item being returned.

Using the Transaction Menu

The Transactions menu allows you to quickly loan, return, and renew items; mark items as lost, damaged, claimed returned, or claimed never had; and cancel a reserve, hold, or booking.



Barcode	Patron	Barcode	Item	Transaction	Created	Date Due
P93	Ravenell, Jordan	B39123	Someone is hiding on Alcatraz Island.	Overdue Loan	19 April 2002	11 September 2003
P93	Ravenell, Jordan	B39124	Seas and oceans.	Overdue Loan	19 April 2002	11 September 2003
P97	Reed, Leslie	B39144	Attack of the mutant	Overdue Loan	19 April 2002	07 October 2003
P97	Reed, Leslie	B39145	The commonwealth of independent states	Overdue Loan	19 April 2002	07 October 2003
P107	Rickenbacker, Tiffany	B39111	Anastasia's chosen career	Overdue Loan	19 April 2002	07 October 2003
P107	Rickenbacker, Tiffany	B39564	The member of the wedding /	Overdue Loan	19 April 2002	07 October 2003
P112	Riley, Dayla	B39206	Mary Anne's bad-luck mystery /	Overdue Loan	19 April 2002	02 October 2003
P112	Riley, Dayla	B39208	Choosing sides /	Overdue Loan	19 April 2002	02 October 2003
P122	Robinson, Kayla	B39251	Beach house /	Overdue Loan	19 April 2002	16 October 2003
P122	Robinson, Kayla	B39252	Goodnight kiss /	Overdue Loan	19 April 2002	16 October 2003
P122	Robinson, Kayla	B39253	The babysitter III /	Overdue Loan	19 April 2002	16 October 2003
P122	Robinson, Kayla	B39254	The prom queen /	Overdue Loan	19 April 2002	16 October 2003
P122	Robinson, Kayla	B39255	The third evil /	Overdue Loan	19 April 2002	16 October 2003
P125	Rollins, Alexander	B39266	Be careful what you wish for-- /	Overdue Loan	19 April 2002	09 September 2003
P125	Rollins, Alexander	B39267	The ghost next door /	Overdue Loan	19 April 2002	09 September 2003
P125	Rollins, Alexander	B39268	The curse of the mummy's tomb /	Overdue Loan	19 April 2002	09 September 2003
P125	Rollins, Alexander	B39269	Welcome to dead house /	Overdue Loan	19 April 2002	09 September 2003
P125	Rollins, Alexander	B39271	One day at Horrorland /	Overdue Loan	19 April 2002	09 September 2003
P127	Roses, Troy	B39278	Welcome to Camp Nightmare /	Overdue Loan	19 April 2002	08 October 2003
P127	Roses, Troy	B39280	Piano lessons can be murder /	Overdue Loan	19 April 2002	08 October 2003

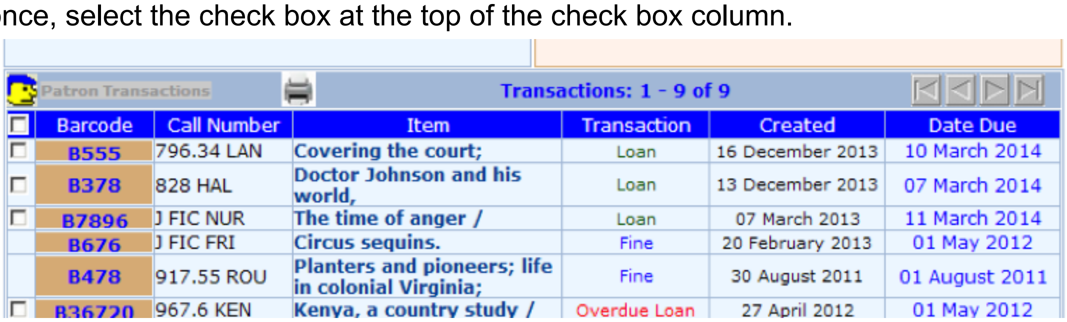
Transactions 1 - 20 of 3475 OK

To access the Transactions menu:

1. Display the item(s) you want to process in one of the following ways.

    a. Enter a patron barcode in Loan, Reserve or Status mode.
    b. Enter an item barcode in Status mode.
    c. Choose a recent transaction
        i. Click **Library Transactions** in the menu on the left.
        ii. Hold the mouse over the rows in the list, select the desired transaction and click on it. This returns you to the main Circulation page, displaying the selected transaction in Status mode.

2. Select the check box by each desired item in the transactions pane. To select all items in that pane at once, select the check box at the top of the check box column.



Barcode	Call Number	Item	Transaction	Created	Date Due
B555	796.34 LAN	Covering the court;	Loan	16 December 2013	10 March 2014
B378	828 HAL	Doctor Johnson and his world,	Loan	13 December 2013	07 March 2014
B7896	J FIC NUR	The time of anger /	Loan	07 March 2013	11 March 2014
B676	J FIC FRI	Circus sequins.	Fine	20 February 2013	01 May 2012
B478	917.55 ROU	Planters and pioneers; life in colonial Virginia;	Fine	30 August 2011	01 August 2011
B36720	967.6 KEN	Kenya, a country study /	Overdue Loan	27 April 2012	01 May 2012

This displays the Transactions menu.

3. Click the transaction type you want to perform.

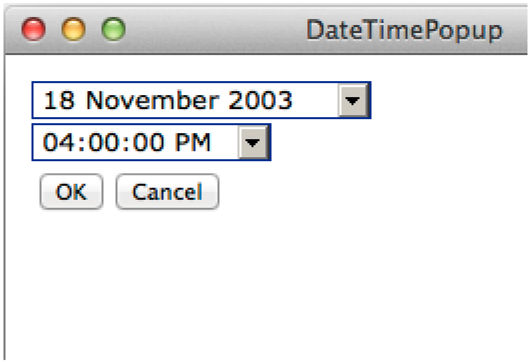
In-House Circulation

This feature takes the guesswork out of tracking in-library usage of your collection. It is used for items that were removed from shelf positions and left on library tables or desks, presumably used at the library though not checked out. It records one use of each item.

1. In the side menu, click **In-House** Circulation.
2. In the Barcode box, scan the item barcode, or type it and then press **ENTER**. Repeat this for each item being returned.

Changing an Item's Due Date

1. Display the item in the **Circulation** window.
2. Under Transactions, click the **Date Due**. This displays a dialog box with the date and time.
3. Change the date and time as desired, then click **OK**.



Recording an Item as Lost or Damaged

When an item is returned and recorded as damaged, a fine is attached to the patron’s record. The fine amount is the maximum amount established for members of the item group (see Circ Periods).

When recording an item as lost or damaged, the fine based on field 852#9 (Price) will only be added if the Fine Transactions entry in the global.ini.REG file is generate=yes.

When an item is recorded as lost, the fine amount is the item price indicated in field 852#9. If no price exists, the fine is the maximum fine as set in the Group Editor.

NOTE*: If you want to be prompted to add an additional transaction fee to a lost or damaged item, change the Transaction Fee entry in the* ***Global.ini.REG*** *file (the default path is* ***C:\M3 Server\Registry\Common)*** *to* ***Prompt for fee=on****. In the amount entry, type the desired amount.*

To record items as lost or damaged, use the Transactions menu. For instructions, see **Using the Transactions Menu**.

Recording an Item as "Claimed Returned" or "Claimed Never Had"

To record items as “Claimed Returned” or “Claimed Never Had,” use the Transactions menu. For instructions, see **Using the Transactions Menu**.

When either of these choices is made in the Transactions menu, the item in question is “returned” from the patron’s record and given a normal status, in other words is shown as Available, in the OPAC. If you wish instead for these choices to result in a status of Missing, select that option in **Circulation Settings – Return Renewal Operations**.

Renewing a Loan on an Item

Circulation provides two methods to renew items on loan. The side menu method is described below. The Transactions menu method saves time if the patron is renewing more than one item; it is described in Using the Transactions Menu.

Side Menu Method

1. In the side menu, click **Renew**.
2. In the **Barcode box**, scan the item barcode, or type it and then press **ENTER**.

NOTE*: If the item is overdue past the grace period set in Groups, an overdue message displays. You can:*

- *Click **Override** to ignore the message and continue with the transaction.*
- *Click **Cancel** to stop the transaction.*

Reserving or Holding an Item

Note**: Deleted items, or items with a status of On Order, In Bindery, Withdrawn or Missing cannot be reserved or held. To allow items In Process to be reserved, select that option in **Circulation Options – Miscellaneous Settings

A Hold is applied when the requested item is currently checked into the library and is therefore available; a Reserve is applied when the item is currently checked out. A Reserve is automatically converted to a Hold when the item is returned.

1. In the side menu, click **Reserve**.
2. In the **Barcode box**, scan the patron barcode, or type it and then press **ENTER**.
3. In the **Barcode box**, scan the item barcode, or type it and then press **ENTER**. The reserve or hold transaction appears in the Item pane.

Notes:

- *When a reserved item is returned, a message displays indicating the name, barcode and contact information of the patron who reserved it, with an option for printing the message.*
- *When a reserved item is returned, a notification e-mail is automatically sent to the patron who reserved it, if there is an e-mail address in the patron record.*
- *You can cancel a reserve or hold with the Transactions menu. See Using the Transactions Menu*
- *If a held item is not claimed and checked out before the end of the hold period, the item becomes held by the next patron who reserved it, or, if there are no other reservations, it returns to Normal status.*

Booking an Item

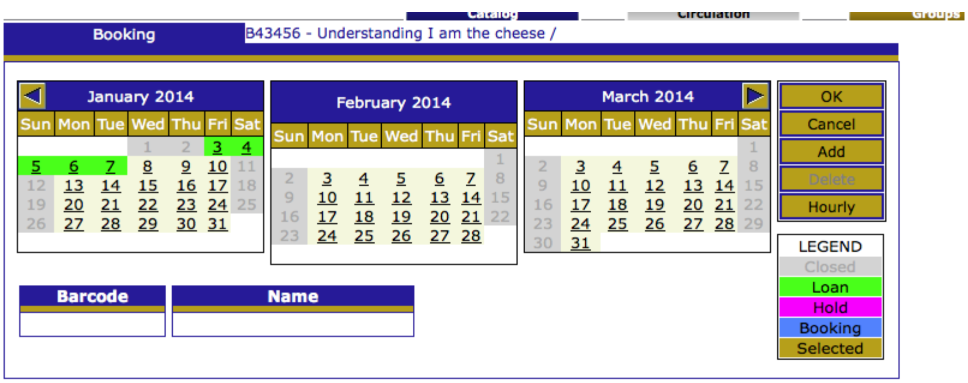
***Note**: You cannot book a deleted item.*

Use the Booking feature to reserve an item such as a conference room or piece of equipment for a future day and/or time. You can book an item for a single day, a range of days, or for specific hours.

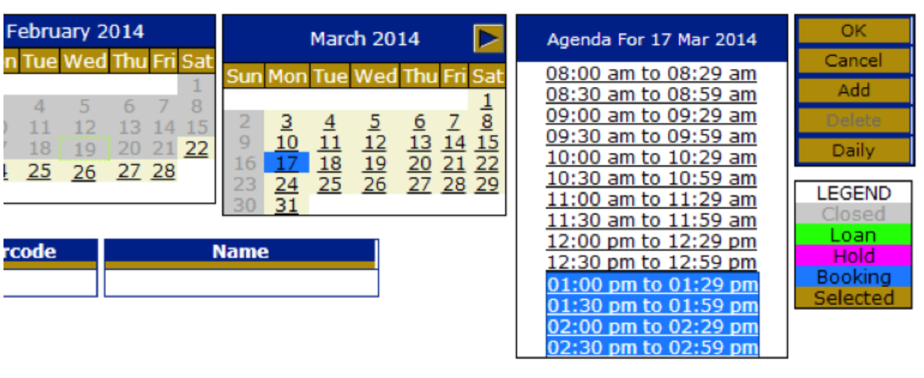
1. On the side menu, click **Booking**.
2. In the Barcode box, scan the patron barcode, or type it and then press **ENTER**. This displays the patron's record in the Patron pane.
3. In the Barcode box, scan the item barcode, or type it and then press **ENTER**. This displays the Booking page.

The three calendars will display any times and dates the item has already been booked and will show the new booking date or time after it has been set.

4. To complete a booking transaction:
    a. If you want a full day or range of days, click the day or the first day of the range on the calendar.
        i. Click Add.



        ii. In the Booking Range box, click the arrow next to the **From** date. This displays a new calendar at the bottom of the page.
        iii. Click a date in the calendar; it is highlighted in blue. The **Booking Range** box displays the **From** date you selected.
        iv. Click the **arrow** next to the **To** date and select a date on the calendar. The Booking Range box now displays the **To** date you selected.
        v. Click OK. The calendar shows the date(s) you selected highlighted in bright blue.
    b. If you want a number of hours only, click on the day and then click **Hourly**.
        i. The date selected is shown in an Agenda box with all the available half-hour time slots.
        ii. Click Add.
        iii. In the Booking Range box, click the arrow next to the **From** date and time.
        iv. Click a time slot in the dropdown menu. Click OK.
        v. Click the arrow next to the **To** date and time.
        vi. Click a time slot in the dropdown menu. Click OK.
        vii. Click OK to save the Booking Range. The Agenda for that date shows the selected time period highlighted in bright blue.



5. When finished, click **OK**. The booking transaction appears on the main Circulation page.

NOTE: You can cancel a booking with the Transactions menu. See Using the Transactions Menu.

Processing Patron Fines

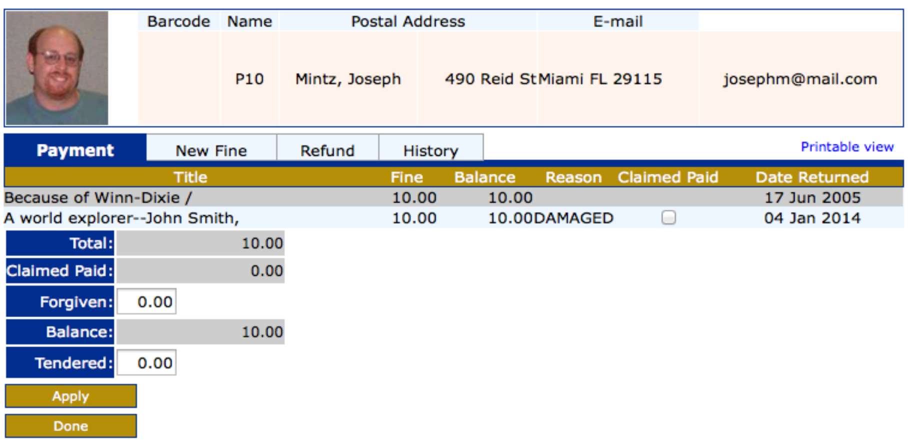
***Note**: To send e-mail notifications to patrons who owe fines, see the preceding section, [Sending E-mail Notifications for Fines and Overdue Items.]*

Fines are created and charged to a patron

1. When an overdue item is returned, if the library charges fines for overdues. (See **[Item Group Circ Periods]** and **[Circulation Settings Return Renewal Operations]**.
2. When an item on loan to a patron is claimed as Lost. See **[Using the Transactions Menu]**.
3. When an item on loan to a patron is determined to be Damaged. See **[Using the Transactions Menu]**.

Recording a Payment

1. In the **Barcode** box, scan the patron barcode, or type it and then press ENTER.
2. Click the **Payment** icon . at the top of the Patron pane. This displays the Payment page, which lists the patron's fine(s).



***Note**: This page also shows pending fines. Any lines without anything in the Reason column are fines that have already accrued on overdue items. This is the amount that will be charged if the item is returned today. For these items, the date in the Date Returned column is actually the date the item was originally due, which changes to the current date when the items are returned.*

3. This page has four tabs:

- **Payment** – Use this tab if the patron is paying the fine, or if any of it is to be forgiven.
    - Type the amount to be forgiven, if any, in the **Forgiven** box.
    -

Type the amount of currency received in the **Tendered** box. Click **Apply**. (If change is due back, a dialog box displays the amount to be returned to the patron. Click **OK**.)

***Note**: If the patron claims that he or she previously paid a particular fine, click the History tab to review the payment history. If you want to record that this item was previously paid, select the Claimed Paid check box by that item. This reduces the **Balance** amount accordingly.*

- **New Fine** – Use this tab if you want to add a new fine. Type the amount of the fine and a note, if desired. The new fine and the note will be added to the fines listed in the Payment tab. Click **Apply**.

***Tip**: Use New Fine to enter a membership fee or a charge for printing or pencils, for example.*

- **Refund** – Use this tab to apply a refund. Type the amount of the refund and a note, if desired. Click **Apply**.
- **History** – Use this tab to view payment history.

4. When finished, click **Done** to return to the main Circulation screen.

Using Self-Check and Self-Return

These features allow patrons to check out or return items without staff assistance.

NOTES:

- For system security, once the Self-Check or Self-Return transaction mode is selected, the patron cannot perform any other type of circulation transaction. Libraries using the Self mode can set up a network workstation restricted to self-checkout and self-return transactions.
- To enable override messages in Self-Check mode, change the Self Mode entry in **Circulation Options**. Otherwise, the only override that will display is if the item is non-circulating.

Using Self-Checkout

1. On the side menu, click **Self-Check**. The workstation remains in this mode until you log out of Oasis.
2. In the **Barcode** box, scan the patron barcode, or type it and then press **ENTER**.
3. In the **Barcode** box, scan the item barcode, or type it and then press **ENTER**. This loans the item.

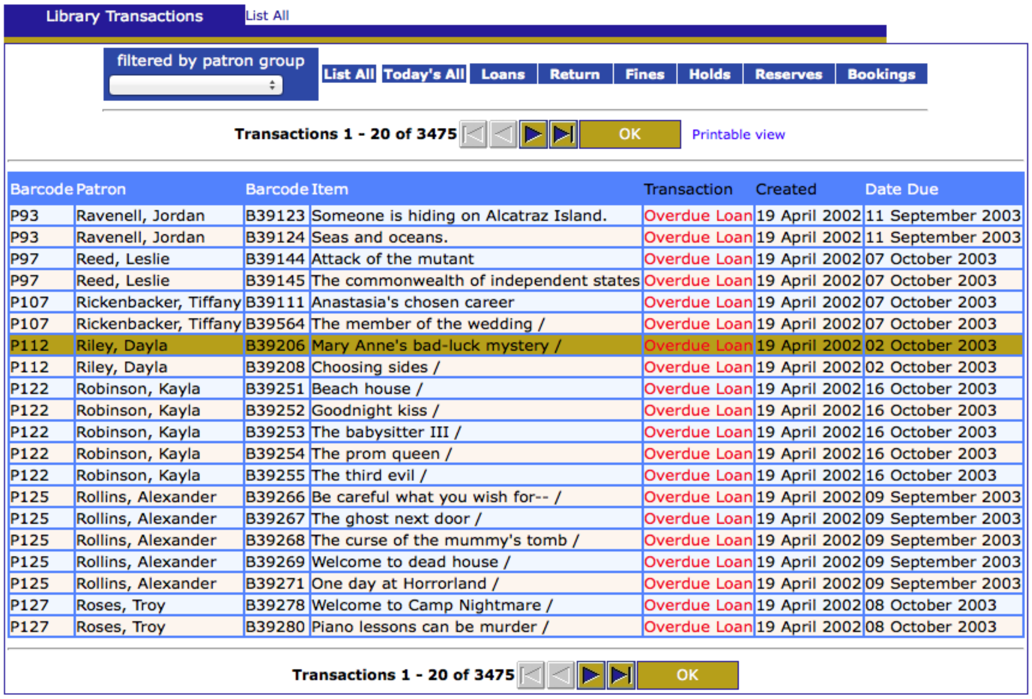
Using Self-Return

1. On the side menu, click **Self-Return**. The workstation remains in this mode until you log out of Oasis.
2. In the **Barcode** box, scan the item barcode, or type it and then press **ENTER**. This returns the item.

Using Library Transactions Mode

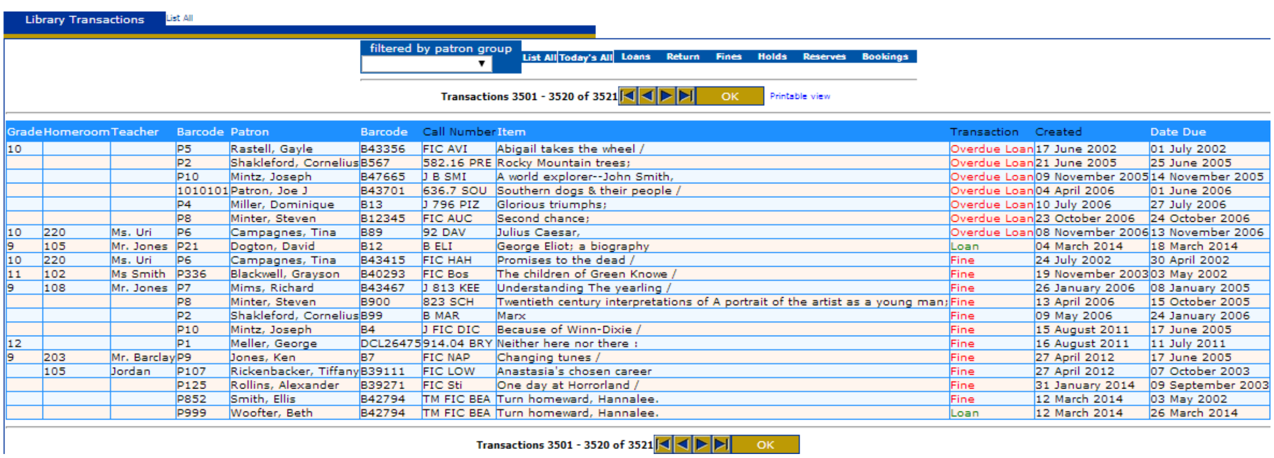
Library Transactions mode allows you to view, sort, and print transactions.

1. On the side menu, click **Library Transactions**. This displays a list of all transactions.



Barcode	Patron	Barcode	Item	Transaction	Created	Date Due
P93	Ravenell, Jordan	B39123	Someone is hiding on Alcatraz Island.	Overdue Loan	19 April 2002	11 September 2003
P93	Ravenell, Jordan	B39124	Seas and oceans.	Overdue Loan	19 April 2002	11 September 2003
P97	Reed, Leslie	B39144	Attack of the mutant	Overdue Loan	19 April 2002	07 October 2003
P97	Reed, Leslie	B39145	The commonwealth of independent states	Overdue Loan	19 April 2002	07 October 2003
P107	Rickenbacker, Tiffany	B39111	Anastasia's chosen career	Overdue Loan	19 April 2002	07 October 2003
P107	Rickenbacker, Tiffany	B39564	The member of the wedding /	Overdue Loan	19 April 2002	07 October 2003
P112	Riley, Dayla	B39206	Mary Anne's bad-luck mystery /	Overdue Loan	19 April 2002	02 October 2003
P112	Riley, Dayla	B39208	Choosing sides /	Overdue Loan	19 April 2002	02 October 2003
P122	Robinson, Kayla	B39251	Beach house /	Overdue Loan	19 April 2002	16 October 2003
P122	Robinson, Kayla	B39252	Goodnight kiss /	Overdue Loan	19 April 2002	16 October 2003
P122	Robinson, Kayla	B39253	The babysitter III /	Overdue Loan	19 April 2002	16 October 2003
P122	Robinson, Kayla	B39254	The prom queen /	Overdue Loan	19 April 2002	16 October 2003
P122	Robinson, Kayla	B39255	The third evil /	Overdue Loan	19 April 2002	16 October 2003
P125	Rollins, Alexander	B39266	Be careful what you wish for-- /	Overdue Loan	19 April 2002	09 September 2003
P125	Rollins, Alexander	B39267	The ghost next door /	Overdue Loan	19 April 2002	09 September 2003
P125	Rollins, Alexander	B39268	The curse of the mummy's tomb /	Overdue Loan	19 April 2002	09 September 2003
P125	Rollins, Alexander	B39269	Welcome to dead house /	Overdue Loan	19 April 2002	09 September 2003
P125	Rollins, Alexander	B39271	One day at Horrorland /	Overdue Loan	19 April 2002	09 September 2003
P127	Roses, Troy	B39278	Welcome to Camp Nightmare /	Overdue Loan	19 April 2002	08 October 2003
P127	Roses, Troy	B39280	Piano lessons can be murder /	Overdue Loan	19 April 2002	08 October 2003

The list shows columns for grade, homeroom and teacher if the library is for a school.

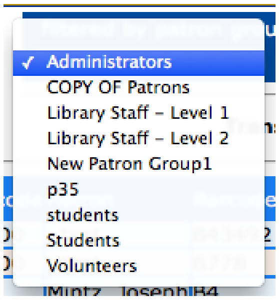


Grade	Homeroom	Teacher	Barcode	Patron	Barcode	Call Number	Item	Transaction	Created	Date Due
10			P5	Rastell, Gayle	B43356	FIC AVI	Abigail takes the wheel /	Overdue Loan	17 June 2002	01 July 2002
			P2	Shakleford, Cornelius	B567	582.16 PRE	Rocky Mountain trees;	Overdue Loan	21 June 2005	25 June 2005
			P10	Mintz, Joseph	B47665	J B SMI	A world explorer--John Smith,	Overdue Loan	09 November 2005	14 November 2005
			1010101	Patron, Joe J	B43701	636.7 SOU	Southern dogs & their people /	Overdue Loan	04 April 2006	01 June 2006
			P4	Miller, Dominique	B13	J 796 PIZ	Glorious triumphs;	Overdue Loan	10 July 2006	27 July 2006
			P8	Minter, Steven	B12345	FIC AUC	Second chance;	Overdue Loan	23 October 2006	24 October 2006
10	220	Ms. Uri	P6	Campagnes, Tina	B89	92 DAV	Julius Caesar,	Overdue Loan	08 November 2006	13 November 2006
9	105	Mr. Jones	P21	Dogton, David	B12	B ELI	George Eliot; a biography	Loan	04 March 2014	18 March 2014
10	220	Ms. Uri	P6	Campagnes, Tina	B43415	FIC HAH	Promises to the dead /	Fine	24 July 2002	30 April 2002
11	102	Ms Smith	P336	Blackwell, Grayson	B40293	FIC Bos	The children of Green Knowe /	Fine	19 November 2003	03 May 2002
9	108	Mr. Jones	P7	Mims, Richard	B43467	J 813 KEE	Understanding The yearling /	Fine	26 January 2006	08 January 2005
			P8	Minter, Steven	B900	823 SCH	Twentieth century interpretations of A portrait of the artist as a young man;	Fine	13 April 2006	15 October 2005
			P2	Shakleford, Cornelius	B99	B MAR	Marx	Fine	09 May 2006	24 January 2006
			P10	Mintz, Joseph	B4	J FIC DIC	Because of Winn-Dixie /	Fine	15 August 2011	17 June 2005
12			P1	Meller, George	DCL26475	914.04 BRY	Neither here nor there :	Fine	16 August 2011	11 July 2011
9	203	Mr. Barclay	P9	Jones, Ken	B7	FIC NAP	Changing tunes /	Fine	27 April 2012	17 June 2005
	105	Jordan	P107	Rickenbacker, Tiffany	B39111	FIC LOW	Anastasia's chosen career	Fine	27 April 2012	07 October 2003
			P125	Rollins, Alexander	B39271	FIC Sti	One day at Horrorland /	Fine	31 January 2014	09 September 2003
			P852	Smith, Ellis	B42794	TM FIC BEA	Turn homeward, Hannalee.	Fine	12 March 2014	03 May 2002
			P999	Woofter, Beth	B42794	TM FIC BEA	Turn homeward, Hannalee.	Loan	12 March 2014	26 March 2014

The columns with white labels can be sorted by clicking on the label.

2. You have the following options:

    - To filter the transactions by patron group click the pull down list and select the appropriate group



- To view information related to the transaction, the transaction anywhere in its row. This displays the patron and item information on the main Circulation page.
- To filter the transactions by type, click click one of the transaction tabs, **Under Loans**, **Fines**, **Holds**, **Reserves**, or **Bookings** choose a further filter for all, current, or a time period.
- To print the transactions, click **Printable view**. This opens a list of transactions only. To print the list, click **Print** on the File menu.

New Features in Release 2.9.3

Call Number is now sortable in Library Transactions.

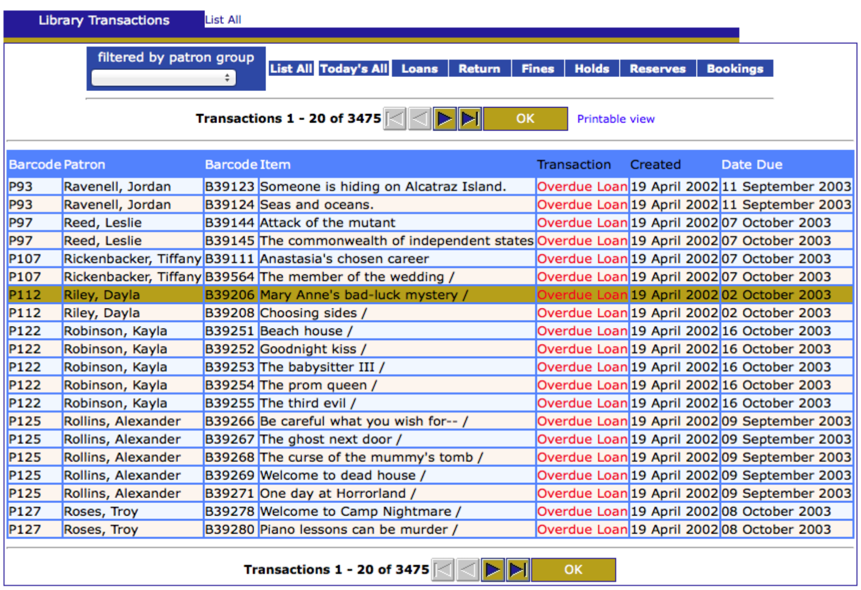
Sending E-mail Notifications for Fines & Overdues

You can send e-mail notifications to patrons who owe fines or have overdue items. There must be an e-mail address entered in the patron record to use this feature.

Tip**: If you want to "cc" (carbon copy) e-mail notifications to another e-mail address, type the address in the cc=* ***Email to furnish copy to *entry. You can enter multiple e-mail addresses by separating them with commas.*

1. Make sure the email notification settings in Circulation Options are completed.

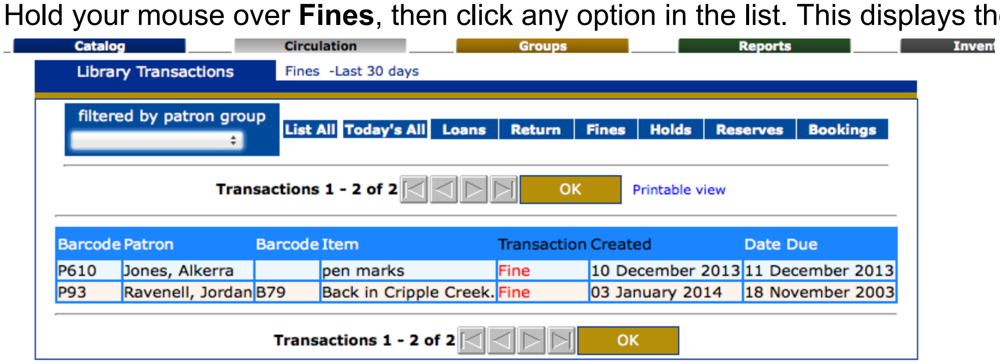
2. On the side menu, click **Library Transactions**. This displays a list of all transactions.



Barcode	Patron	Barcode	Item	Transaction	Created	Date Due
P93	Ravenell, Jordan	B39123	Someone is hiding on Alcatraz Island.	Overdue Loan	19 April 2002	11 September 2003
P93	Ravenell, Jordan	B39124	Seas and oceans.	Overdue Loan	19 April 2002	11 September 2003
P97	Reed, Leslie	B39144	Attack of the mutant	Overdue Loan	19 April 2002	07 October 2003
P97	Reed, Leslie	B39145	The commonwealth of independent states	Overdue Loan	19 April 2002	07 October 2003
P107	Rickenbacker, Tiffany	B39111	Anastasia's chosen career	Overdue Loan	19 April 2002	07 October 2003
P107	Rickenbacker, Tiffany	B39564	The member of the wedding /	Overdue Loan	19 April 2002	07 October 2003
P112	Riley, Dayla	B39206	Mary Anne's bad-luck mystery /	Overdue Loan	19 April 2002	02 October 2003
P112	Riley, Dayla	B39208	Choosing sides /	Overdue Loan	19 April 2002	02 October 2003
P122	Robinson, Kayla	B39251	Beach house /	Overdue Loan	19 April 2002	16 October 2003
P122	Robinson, Kayla	B39252	Goodnight kiss /	Overdue Loan	19 April 2002	16 October 2003
P122	Robinson, Kayla	B39253	The babysitter III /	Overdue Loan	19 April 2002	16 October 2003
P122	Robinson, Kayla	B39254	The prom queen /	Overdue Loan	19 April 2002	16 October 2003
P122	Robinson, Kayla	B39255	The third evil /	Overdue Loan	19 April 2002	16 October 2003
P125	Rollins, Alexander	B39266	Be careful what you wish for-- /	Overdue Loan	19 April 2002	09 September 2003
P125	Rollins, Alexander	B39267	The ghost next door /	Overdue Loan	19 April 2002	09 September 2003
P125	Rollins, Alexander	B39268	The curse of the mummy's tomb /	Overdue Loan	19 April 2002	09 September 2003
P125	Rollins, Alexander	B39269	Welcome to dead house /	Overdue Loan	19 April 2002	09 September 2003
P125	Rollins, Alexander	B39271	One day at Horrorland /	Overdue Loan	19 April 2002	09 September 2003
P127	Roses, Troy	B39278	Welcome to Camp Nightmare /	Overdue Loan	19 April 2002	08 October 2003
P127	Roses, Troy	B39280	Piano lessons can be murder /	Overdue Loan	19 April 2002	08 October 2003

Transactions 1 - 20 of 3475 OK

3. Hold your mouse over **Loans**, then click an **Overdue** option in the list.
OR
Hold your mouse over **Fines**, then click any option in the list. This displays the selected transaction type.



Barcode	Patron	Barcode	Item	Transaction	Created	Date Due
P610	Jones, Alkerra		pen marks	Fine	10 December 2013	11 December 2013
P93	Ravenell, Jordan	B79	Back in Cripple Creek.	Fine	03 January 2014	18 November 2003

Transactions 1 - 2 of 2 OK

__Note__: E-mails will only be sent to patrons who have an email address in their patron record.

4. To send an e-mail notification to every patron in the list, click the Send notification link.

An example of an emailed overdue notice:

Date: Wednesday, March 12, 2014 09:58 AM
This is an automatic overdue notice. If you have already returned the item, please ignore this message.

Patron Barcode: P49458
Patron Name: Nelson, Debra
Phone No: 315-309-9475

Item Barcode: B12667
Title: Making schools work :
Due Date: Monday, June 26, 2013 05:00 PM

Item Barcode: B18459
Title: Teaching by the book :
Due Date: Monday, June 26, 2013 05:00 PM

An example of an emailed fine notice:

Date: Wednesday, March 12, 2014 01:03 PM
This is an automatic fine due notice. If you have already paid this fine, please ignore this message.

Patron Barcode: P6
Patron Name: Campagnes, Tina
Phone No: 546-6789

Item Barcode: B43415
Title: Promises to the dead /
Due Date: Tuesday, April 30, 2013 04:00 PM
Due: 4.90

Item Barcode: B39324
Title: The mystery cruise /
Due Date: Wednesday, April 17, 2013 04:00 PM
Due: 5.80

Item Barcode: B28763
Title: Stepping on the cracks.

Due Date: Monday, April 11, 2005 05:00 PM
Due: 10.00

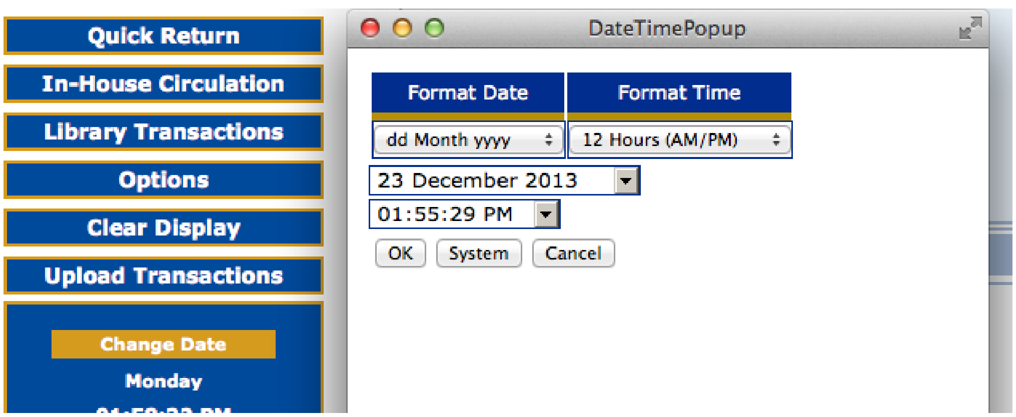
Changing the Oasis System Date

The system date displays in the Circulation side menu. You can change this date if you need to backdate the system calendar to process a return, such as for items returned in evening **bookdrops**.

1. In the side menu, click **Change Date**.
2. Change the date and/or time, then click **OK**. The new date or time displays in the side menu.
3. To return the system to the current date and time,

    a. click **Change Date**, then click System. Click **OK**. The current date and time display in the side menu.

    b. OR, change transaction mode, from Return to Loan, for example. The date and time return to current automatically.



Using Inventory

Using Oasis Inventory, you can conduct a full or partial inventory of your library's holdings. A full inventory involves scanning the entire collection during one time period. A partial inventory involves scanning portions of the collection at any time throughout the year. Both types of inventory are explained in this chapter.

Overview

Inventory Overview

Conducting an inventory with Oasis requires only a few basic steps. First, the items to be inventoried need to be scanned. Then the scanning results need to be uploaded into Inventory. If conducting a partial inventory, the range limits of the corresponding holdings need to be entered. Lastly, the “Do Inventory” procedure must be run to compare the scanned barcodes to the corresponding holdings database.

When Inventory compares the scanning results to the contents of the holdings database, it groups and categorizes any differences as Newly Found, Missing, Invalid Barcodes, Misplaced, Loaned Shelved, No Barcode, Duplicate Barcode, or Out of Range(s) Items. Once the results are compiled, you can print the results lists needed to reconcile your inventory.

Signing In to Inventory

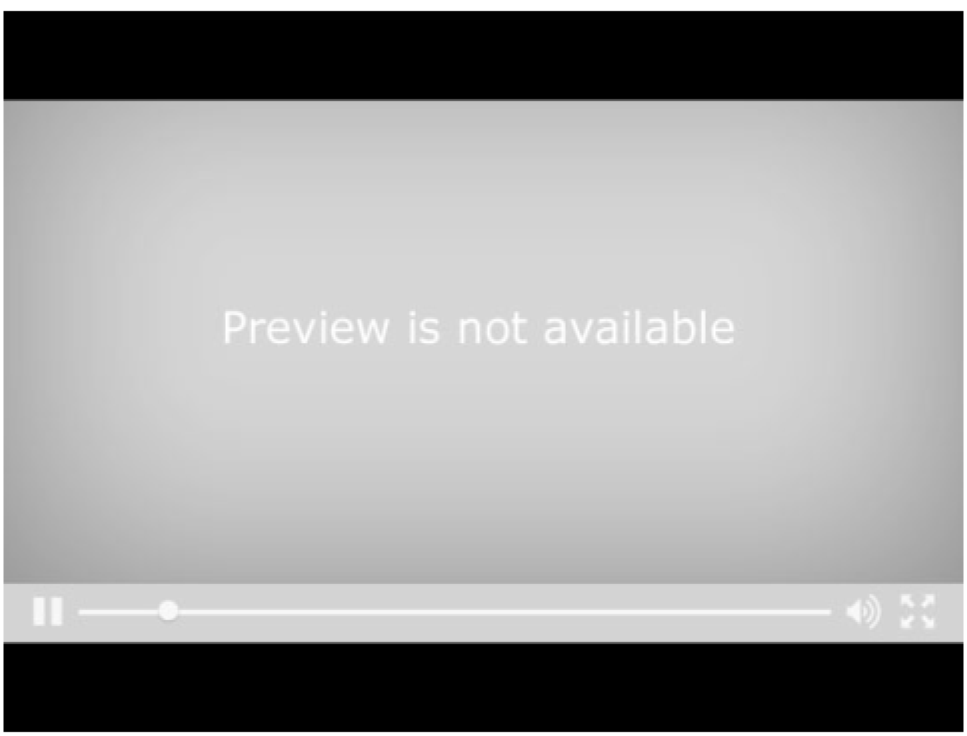
In order to use Inventory, you must sign in to the Catalog with the appropriate permissions.

1. Click the Sign In link that appears on the right side of most pages in the Catalog.
2. Type your login name in the Login Name/Barcode box.
3. In the Password box, type your password.
4. Click Sign In. Oasis displays the tabs for all library functions that you have permission to access.
5. Click the Inventory tab at the top of the page.

NOTE: If you need to sign out, click the Catalog tab and then click the Sign Out link on the right.

Inventory Features

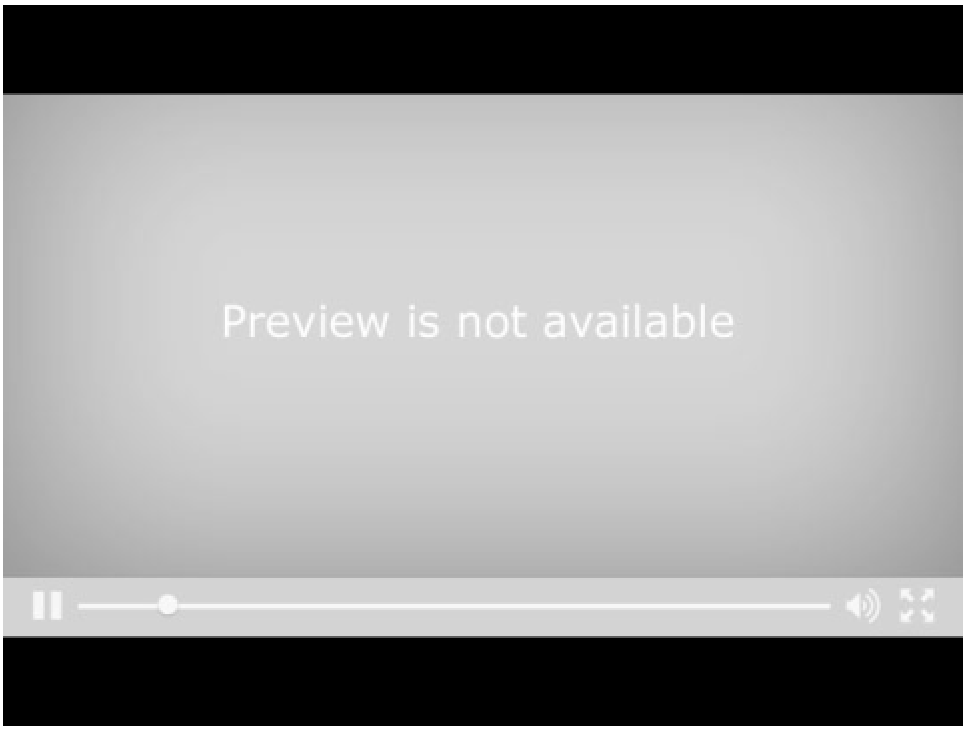
With Oasis Inventory, you can create a new inventory session, open an existing session, and view inventory reports. The three Inventory tabs, Home, Session, and Report, indicate which mode you are in.



Setup

To ensure accurate inventory results, you should not circulate or catalog items while the collection is being scanned.

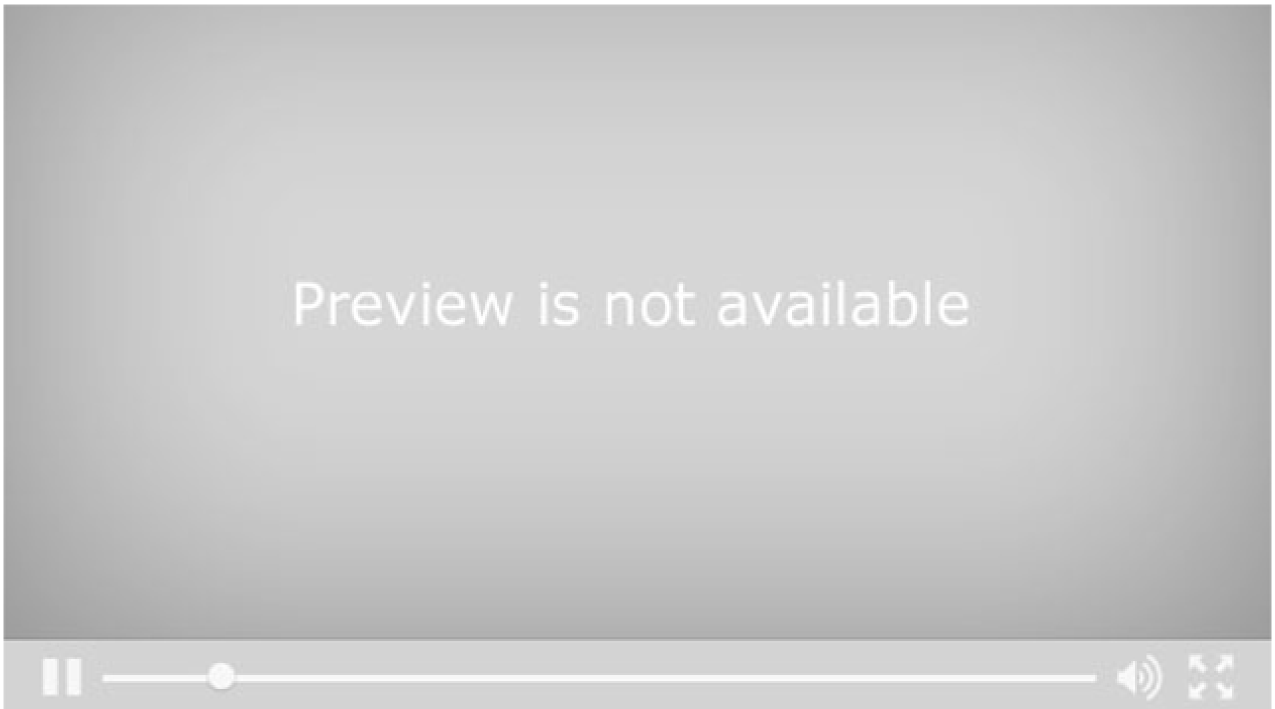
NOTE: A Tricoder can hold an average of 6,000 scanned barcodes at a time. Once that capacity is reached, the information needs to be uploaded into Inventory. It may take several scanning and uploading sessions to build the inventory data.



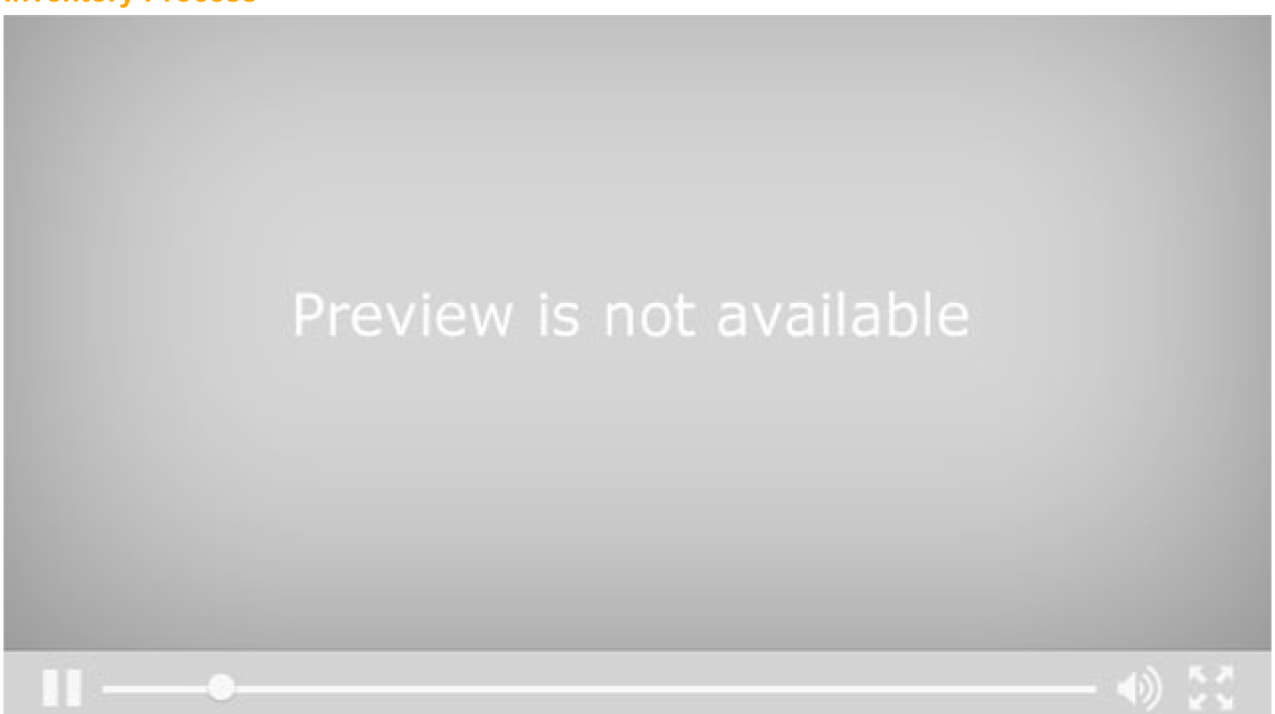
Conducting Inventory

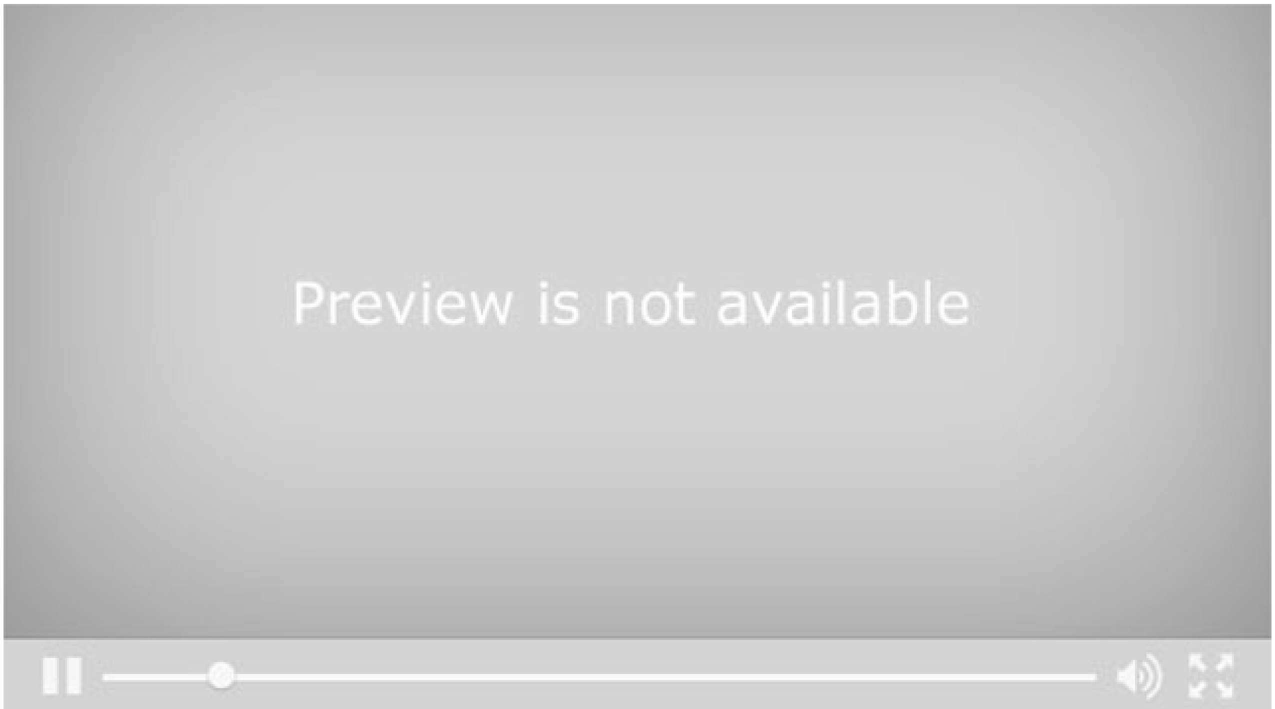
To ensure accurate inventory results, you should not circulate or catalog items while the collection is being scanned.

Create Barcode set



Inventory Process



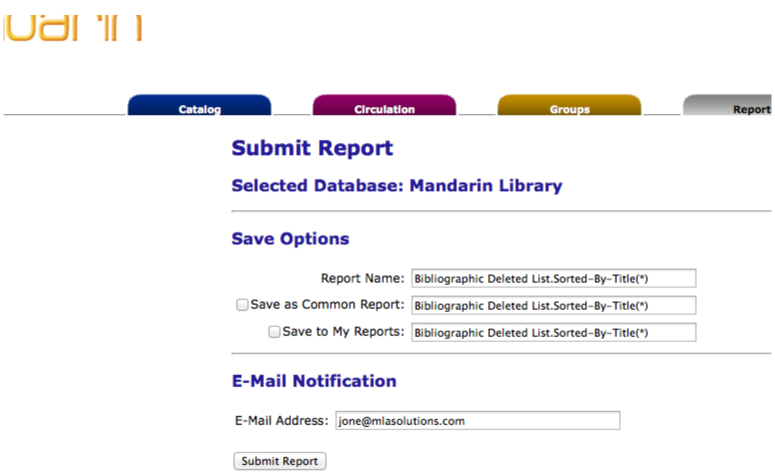

Preview is not available

Using the Report Generator

On the main Reports page, you can create a report, access your saved reports, generate common reports, or view report results. These procedures are described in the following sections.

Creating a Report

1. When the Report Generator is launched, the Create Report page displays. You can also access this page by clicking **Create Report** in the menu.
2. In the list, click the type of report you want to create. Several pages of questions will follow, allowing you to select the exact type of report you need.
3. The Submit Report page displays



On this page, you have the following options:

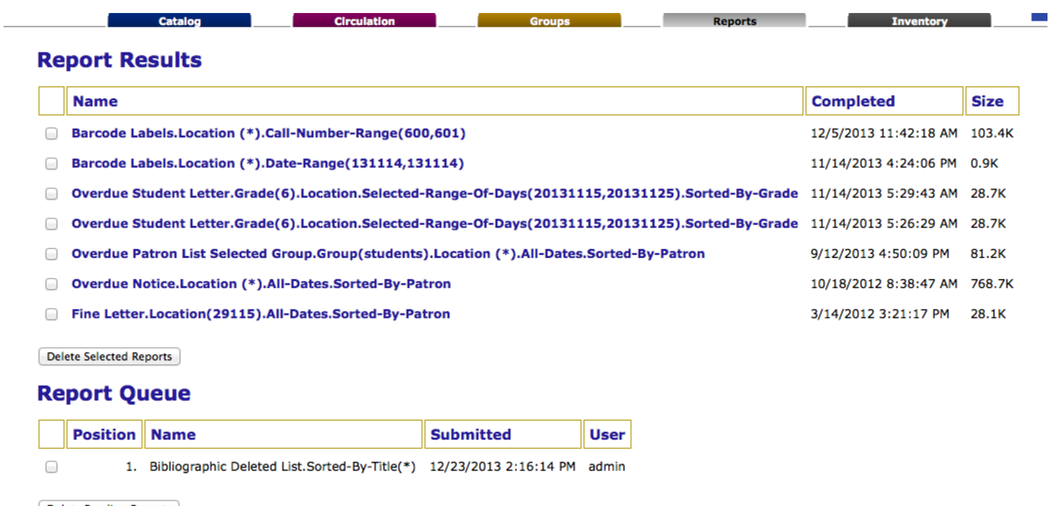
- Select the desired database in the **Select Database** list.
- Type a name for the report in the Report Name box.
- Select the Save as Common Report check box if this is a report you plan to use regularly, then type a name for the report. Later, you can quickly access this report by clicking Common Reports in the side menu. For more information, see “Generating Common Reports”

__Note__: Any report saved to My Reports will be available only to a user who is signed in with your login name and password.

- Select the **Save** to My Reports check box if this is a report you want to save only for your use, then type a name for the report. Later, you can quickly access this report by clicking My Reports in the side menu.
- In the E-Mail Address box, your e-mail address displays. This is the address that will receive a notification when the report is ready. If you do not have an e-mail address assigned in the system and the box is empty, type your e-mail address.

The e-mail you receive will include a link to the PDF report. (You must have Adobe¨ Reader¨ installed to view the report.)

4. Click **Submit Report**. This displays the Report Results. Your report will be listed in the Report Queue while it is processing. When it is ready for viewing, it disappears from the Report Queue and appears in the Report Results.
5. To view the report, do one of the following:
   • In the Report Results list, click the **report name**. This opens the PDF report.
   • If you indicated an e-mail address when you submitted the report, you will receive an e-mail notification when the report is ready. Click the link provided in the e-mail to open the PDF report.



	Name	Completed	Size
	Barcode Labels.Location (*).Call-Number-Range(600,601)	12/5/2013 11:42:18 AM	103.4K
	Barcode Labels.Location (*).Date-Range(131114,131114)	11/14/2013 4:24:06 PM	0.9K
	Overdue Student Letter.Grade(6).Location.Selected-Range-Of-Days(20131115,20131125).Sorted-By-Grade	11/14/2013 5:29:43 AM	28.7K
	Overdue Student Letter.Grade(6).Location.Selected-Range-Of-Days(20131115,20131125).Sorted-By-Grade	11/14/2013 5:26:29 AM	28.7K
	Overdue Patron List Selected Group.Group(students).Location (*).All-Dates.Sorted-By-Patron	9/12/2013 4:50:09 PM	81.2K
	Overdue Notice.Location (*).All-Dates.Sorted-By-Patron	10/18/2012 8:38:47 AM	768.7K
	Fine Letter.Location(29115).All-Dates.Sorted-By-Patron	3/14/2012 3:21:17 PM	28.1K

	Position	Name	Submitted	User
	1.	Bibliographic Deleted List.Sorted-By-Title(*)	12/23/2013 2:16:14 PM	admin

Generating Your Saved Reports

1. In the side menu, click **My Reports**. This displays the list of reports that have been saved to your login name.
2. Select the check box next to the report you want to generate, then click Resubmit. This resubmits the report criteria and generates a current report.

__NOTE__: To delete reports from this list, select the check box next to each desired report and click Delete Selected Reports at the bottom of the list.

3. To view your report, see step 5.

Generating Common Reports

1. In the side menu, click **Common Reports**. This displays the list of commonly used reports.
2. Select the check box next to the desired report, then click Resubmit. This resubmits the report criteria and generates a current report.

***NOTE**: To delete reports from this list, select the check box next to each desired report and click Delete Selected Reports at the bottom of the list.*

3. To view your report, see step 5.

Viewing the Report Results and Report Queue

You can view the Report Results list and the Report Queue list at any time by clicking Report Results in the side menu. Pending reports appear in the Report Queue until they are finished processing. When they are ready for viewing, they disappear from the Report Queue and appear in the Report Results.

NOTE: To delete reports from the Report Results, select the check box next to each desired report and click Delete Selected Reports. To delete reports from the Report Queue, select the check box next to each desired report and click Delete Pending Reports.

Minimum System Requirements

SERVER			
Requirements	Hardware	Operating System	Other Requirements
Minimum Requirements	Intel Pentium4 @ 2GHz * 1 GB RAM * 2 GB free space	Windows® Server 2003 or later. Include 32 or 64 bit	IIS 6.0 or later** Microsoft® .NET Framewo Redistributable Package 1
Recommended for fewer than 5 sites*	Intel Pentium4 @ 3GHz * 4 GB RAM * 2 GB free space		
Recommended for 5 sites*	Dual-core Intel Xeon @ 2GHz * 8 GB RAM * 2 GB free space		
Recommended for 10 sites*	Quad-core Intel Xeon @ 2GHz * 8 GB RAM * 3 GB free space		
Recommended for 20 sites*	Dual Quad-core Intel Xeon @ 2GHz * 16 GB RAM * 4 GB free space		
Recommended for more than 20 sites*	Requirements will be determined based on needs		

* SITE: Defined as a Location or Library with an average of 1,000 circulation transaction per day.

** The number of users connecting to Oasis can greatly influence the hardware requirements.
The requirements listed here are guidelines; your actual requirements may vary.

*** If the Oasis setup does not detect these on your system, they will be installed automatically.

WORKSTATION	
Web Browser	Other Requirements
Microsoft Internet Explorer 10 or later OR Firefox 3 or later	JavaScript™ enabled Java™ Java Runtime Environment (for viewing online help) Adobe® Reader® 6.0 or later (for viewing reports) Monitor’s resolution should be set to 1024x768 or higher

Appendix

Release

2.9.2
March 2014

Advanced Cataloging.

1. The barcode or title has been added to the message “Unable to purge due to open transactions …”.
2. ISBN/ISSN Fetch has been updated to handle an invalid present scenario. A Deselect All button has been added to handle selection of large numbers of Z39.50 servers.
3. An issue where Save Failed is logged during a Patron Overlay has been addressed.
4. Under certain circumstances, it was possible that the list of Groups on Step 3 of the Import could be empty.

Catalog (Web OPAC).

1. TABvue: Oasis now integrates with TABvue to facilitate the management and display of ebooks.
2. Catalog now creates a statistical “loan” transaction similar to in-house circulation each time the 856 URL is clicked on a bibliographic record. There does not have to be a logged-on user. This requires an update to record formats.
3. Oasis will now display cover images and summaries using the Google API, if Syndetics is turned off. Legacy local picture table can still be accessed by setting the Syndetics option to ‘legacy local’.
4. A problem that could prevent attaching pictures in Visual Search has been corrected.
5. Some issues involving display or functionality in Internet Explorer 11 have been addressed.
6. The ILL request email has been enhanced to include title and location as part of the subject.
7. The number of overdues is now displayed in My Account > My Info. If the user has overdues, a red exclamation mark appears next to the My Account entry in the menu.
8. If the location is School, My Account > My Info now displays grade, homeroom, and teacher in place of address and phone number. Barcode is also removed and the student’s last name is initialized.
9. In order to improve relevance of Record Fetch results, queries are now sent as a phrase.
10. German Eszett (ß) and the euro sign (€) are now handled.
11. Record Fetch handles non-responsive Z39.50 servers and its performance has been enhanced.
12. A new field has been defined in Bibliographic records: 994. If 994#a = ‘0’, the record is ‘invisible’ in search results. This requires an update to the Bibliographic.REG file and a reindex of the Bibliographic table.
13. Large-size patron images are scaled down in My Account > My Info and in search results.
14. When adding a new record, the new record is now displayed automatically on returning from Record Editor.
15. All records added using Record Fetch are automatically displayed in a new search result.
16. An issue with how Cataloging Access is handled has been addressed. This issue could have allowed users with insufficient rights to post unreviewed comments.
17. The Reading Program selection no longer defaults to Lexile. ‘Select reading program’ is now the default selection.
18. My Account > My Info now includes ‘Welcome back, %FirstName%’.
19. It is now possible to change the number of results on the fly, up to 200. The maximum number of results to display is now 200. The maximum number of holdings per page is now 100.

Circulation.

1. If Suppress overdues messages is true, the user is no longer prompted that an item is overdue every time the user tries to renew an overdue item from the Patron view.

2. In Library Transactions, a Call Number column has been added before the Item column.
3. Holidays & Exceptions now display with the most recent date at the top. If a date is changed, the entry will reposition in chronological order.
4. Overdue loan count now displays in the Patron pane (requires update to Display.cfg).
5. Item informational messages now display correctly.
6. Searching form the Barcode field now uses the Title attribute when the bibliographic table is searched.
7. The 'Place on Hold' message has been disabled during the Upload Transaction process.
8. There is a new due date option – "Due date same day of week". If this option is selected, the due date will fall on the first open day that is the same day of the week as the loan date.
9. The loaded patron is no longer cleared when switching from Return to Loan mode.
10. Receipt printing has been improved.
11. The Send Notification link was absent on Overdue Loans Current Day.
12. Circulation now gives only the error tone on Barcode Not Found in Quick returns. Previously, Circulation had given a pop-up message.
13. Global Recalls now has the same ordering and chronological adjustment as Holidays & Exceptions.
14. A crash involving the browser's Back button returning to Library Transactions and selecting another patron has been addressed.

Group Editor.

1. The Default Patron and Item groups now display a blank entry if the defaults have not been set. Previously, the first group alphabetically was displayed.
2. A crash involving item searches has been addressed.
3. The user interface on the Members tab has been corrected to show selected holdings. A related crash has been addressed.
4. On the Members tab, for each select bibliographic record, all the holding are automatically selected by default.

Reports.

1. Reports has been updated to use the default Oasis theme style.
2. Eye-readable barcodes are no longer blurry.
3. The speed of report creation is much faster.

2.9.3

June 2014

Advanced Cataloging

New Features

1. It is now possible to add a field/subfield using Find/Replace.
2. Fields and subfields can now be renamed.

Improvements

1. When using the Advanced options, Find/Replace now assumes an asterisk (*) search and the Wildcards selection is made.
2. On Remove Field/Subfield, if Remove Entire Field is selected, it is no longer necessary to require the user to enter a subfield.

Catalog (including Web OPAC)

New Features

1. Catalog supports a new permission called Change Login/Password to control users' ability to change the username and password in My Account.
2. Duplicate detection for records added from Record Fetch has been implemented.
3. Items that are added via Record Fetch now create holdings for each occurrence of 852.
4. The Setup page has been enhanced to allow the user to reset Record Formats and Record Templates to the current default.
5. A new key has been added to the Z39.50 Searches databases to control whether 852 fields should be removed when importing records through Record Fetch. The default is to remove.
6. Clicking on the Catalog tab now returns the user to the initial page.

Improvements

1. The RESERVED status in Record Details now shows the total number of hold and reserve transactions.
2. If logo_redirect has an empty URL, clicking the logo image will take the user to Catalog's initial page.
3. The cover image no longer displays when using List and Compressed List formats.
4. Databases that return 0 results are no longer listed on the Results page.
5. In My Account Current Transactions and History, the Author is now a link and searches the Author index if clicked.
6. The holdings are now listed in the Print format in Results and the Bookbag.
7. The MLA and APA citation styles have been corrected. The update installer will update the corresponding record formats for all installations.

Adjustments

1. The Reserve At pick list was unavailable if the user did not have access to Cataloging. The only requirement is Hold/Reserve access for OPAC.
2. The Data Pager was causing the session to reinitialize on Internet Explorer 11.
3. The Contact Your Librarian contact is now emailed when reserving/holding items in a non-scoped environment, or if the library record lacks email address.

4. Bibliographies whose filenames contained apostrophes could not be deleted.
5. After clicking the Setup button and logging in to the setup page for a particular installation (coming from a logged-in session), it was not possible to Edit or Add to Sort Formulas, Record Icons, or All Material Types.
6. After searching in Standard Search using a Lexile (or other RP) range, if you switched to Advanced Search your query would generate an Invalid Lexile range error.
7. The Tabvue button has been enabled on the stand-alone Oasis (Web OPAC).

Circulation

New Features

1. Clicking the Circulation tab from anywhere within Circulation will take the user to the initial Circulation page.
2. Call Number is now sortable in Library Transactions.

Improvements

1. In new installations of Oasis, RDA field 264#c is handled along with 260#c for displaying Date of Publication. Existing Display.cfg files can be modified as follows: ~Global/Date~%bib:260#c% %bib:264#c%
2. The filtered and/or sorted state in Library Transactions is now preserved as the user goes to and from other areas of Circulation.

Adjustments

1. Circulation no longer sends the user to the Directory page after the application pool has recycled.
2. When entering Loan mode by clicking an entry in Library Transactions, the Item link in the Item pane loaded the wrong bibliographic record.
3. The presence of the Patron Picture no longer causes the data to shift under the wrong column headers on the Fine Payment screen.
4. A crash that could occur when adding entries to Holidays & Exceptions in the Schedule with the error 'Item has already been added' has been addressed.
5. Transactions created using Item Specific Reserve did not include call number.

Group Editor

New Features

Group Editor supports a new permission called Change Login/Password to control users' ability to change the username and password in My Account.

Record Editor

New Features

Record Editor now allows the user to set visibility using the Mark Invisible checkbox.

Improvements

1. The Calendar that is used for 853#e (date of expiry) now allows going forward a year at a time.
2. When editing an existing bibliographic record, if the record has no 852 initially, a holding is now created, if the user adds 852 data.

Adjustments

1. Record Editor failed with 'Session Expired' if there were mixed-case subfields ('a' and 'A') when an attempt was made to modify or save the record.
2. Corrected an issue where 008 was not added to the patron record when the Default Patron group was unspecified.

Reports

Improvements

1. Overdue Notice 1 Per Page report has been added.
2. Item List reports have been updated to support RDA field 264.

Adjustments

1. The Item List reports now sort by Title. When Title was specified as the sort, the sort had been by Call Number instead of Title.
2. The call number was blank in all of the Statist

2.9.4

September. 2014

Advanced Cataloging.

- The Find/Replace UI has been widened, and additional columns added to the results view. All columns are sortable, with the exception of Title in the holding display. For selected bibs and holdings, you can see the related records. All records can be edited

Catalog (Web OPAC).

- A Print_Holdings key in the Settings section of installation.xml has been implemented. The value will be On or Off. The default will be On. If the setting is Off, the holdings will not print in the printable format for Results or the Bookbag.

- An issue involving Online Resource availability color code has been addressed.

- Catalog no longer sends “Reserve” email on loaned or held items that are reserved. There are now separate emails for holds and reserves (item specific/pickup at different location).

- When switching the attribute selection, the Material Types and reading program ranges are no longer reset.

- Redundant “No Results” popup has been removed from Record Fetch results. The databases returning 0 records have been removed from the display.

- Clicking on the title now takes the user into Record Details.

- It is now possible to create database groups.

- Local cover preference in search results and details view has been implemented. If the record contains a 996#a, the local cover will display preferentially. Other records will use Syndetics or Google, if the setting is Syndetics or Local, respectively.

- There is a new option in the Z39.50 database configuration to strip 852 fields during a Record Fetch.

- Cover images no longer display in List and Compressed List formats.

- Databases that return 0 results are removed from the display on the Results page.

- Issues affecting deletion and viewing of bibliographies with apostrophes in the name have been addressed.

Circulation.

- The following filters have been added to Library Transactions: Grade, Teacher, and Home Room.

- Patron and Item search results layout has been changed to a tabular format. Columns are sortable. Large pictures are scaled down.

- The Printable View in Library Transactions has been converted to PDF format in order to address formatting issues and the "only the first page of Library Transactions (printable view) prints in Firefox" issue.

- The filename of the receipt PDF has been corrected from 'reciept.pdf' to 'receipt.pdf".

Group Editor.

- The display has been widened.
- It is now possible to display 10, 20, or 50 groups per page.
- The sort order is maintained when returning to a sorted list from other functions.
- All columns are now sortable.
- The text of deleted records is red.
- A spinner has been implemented during searches and sorts.
- Vertical alignment of Oasis tabs has been corrected when the logo height is less than 100px.
- Clicking the Groups tab will return the user to the initial Group page.
- The datapager has been enhanced to support positioning within the result list.

Inventory.

- It is now possible to restrict the inventory by 852#a for unscoped data.

- Barcode sets can now be exported as text files.

Record Editor.

- Diacritical characters were not handled in the holding record created from saving the bibliographic record with new 852 field.

- Record Editor now updates Lexile information using a Lexile flat file containing the Lexile values for all supported titles.

Ordering & License

You can **instantly order** the fully licensed version of Mandarin Oasis at automation@mlasolutions.com or call 561 995 4010 opt 2.

Please visit www.mlasolutions.com for pricing information.

Contacts & Credits

POSTAL ADDRESS

Mandarin Library Automation, Inc.
P.O. Box 272308
Boca Raton, FL 33427-2308

PHONES AND FAX

(800) 426-7477 Toll-free
(561) 995-4010 Local
(561) 995-4065 Fax

REGULAR OFFICE HOURS

M-F 8:30AM - 5:00PM EST

TECHNICAL SUPPORT HOURS

24x7x365 - 24 hours/day, 7 days/week

BY EMAIL

Sales & Marketing: automation@mlasolutions.com
Customer Service: automation@mlasolutions.com
Technical Support: support@mlasolutions.com
Webmaster: webmaster@mlasolutions.com