

L4U WEB MANUAL

for Enterprise 3.1 & Elite 3.1

Copyright

This manual and the software described herein are copyrighted with All Rights Reserved, Under the copyright laws, the text and illustrations in this guide, and the software included with L4U Library Software products may not, in whole or in part, be copied, photocopied, reproduced, translated or converted to any electronic or machine readable form without prior written consent of L4U Library Software. Copyright © 2011 SRB Education Solutions Inc. All Rights Reserved Worldwide.

Trademark

4D, 4D Server, 4D Runtime and 4th Dimension are trademarks of ACI US Inc. and ACI, MacintoshTM is a registered trademark of Apple Computer Inc. Windows 95, 98, 2000, NT, ME, XP, Vista & Windows 7 are registered trademarks of Microsoft. All other trade names are the registered trademark of their respective holder.

Introduction

Welcome to **L4U Library Software** - *Library Management Made Easy!*TM The staff at L4U Library Software would like to thank you for your purchase. We are confident that you will find our software to be a valuable tool in ensuring the efficiency of your library operations.

About this Manual

Every L4U installation with Web Server allows patrons to search the collection via the iPAC (Internet Public Access Catalog). L4U FreedomTM licensed users are granted administrative access to the collection via the iPAC. This user guide provides detailed information for L4U on the Web and all of its functions.

The L4U User Manual is a separate manual and provides detailed information on the Administration Utility for both L4U EnterpriseTM and L4U Platinum EliteTM. Please note that some iPAC and Freedom options are configured with in the L4U program and are therefore explained in the *L4U Users Manual*. The manuals provide step by step instructions with any differences in operating systems noted in the text. Screen shots may appear in either Macintosh or Windows format throughout the manual.

Before using this manual, you need to install the L4U Platinum Elite program using the installation instructions provided with your software package. L4U Enterprise Users would have this done for them by their Support group. A quick overview of the product and possible feature revisions are also available in the Quick Start Guide. We recommend you keep the installation instructions with the manual. If you must reinstall L4U, please refer back to the installation guide that you received with the software or consult L4U Client Corner later in this chapter.

L4U documentation assumes you have a working knowledge of your operating system and its conventions, including how to use a mouse, standard menus and commands. You should also know how to open, save, print and close files. For more information on these techniques, consult the documentation that came with your computer.

Notational Conventions

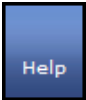


- Dialog box names, options, menu names, button names, and menu commands will appear in *Italic type*.
- Case sensitive characters, that are required to be typed as is, will appear in **Bold**.
- Shortcut options may be provided and will appear in square brackets (Example: [Ctrl 1]).
- Navigating through the menus will be represented with the ">" symbol. (Example: Choose *File* > *Import File*, means select the sub-menu *Import File* from the *File* main menu).

Keyboard Conventions

- Names of keys that you type will appear in SMALL CAPITALS (Example: TAB and SHIFT)
- A plus sign (+) between two key names means that you must press those keys at the same time (Example: “Press ALT+TAB”, means that you hold down ALT while you press TAB).
- You can choose menu commands by pressing the key combination listed next to the particular menu command. For example, in Windows “CTRL+Y” or in Macintosh “⌘+Y” may be used to reach the circulation screen. These are referred to as shortcuts.

Icons

The following table describes the icons that are used throughout this manual.

Icon	Description
	<i>Context Sensitive Help</i> is available throughout the iPAC and L4U Freedom wherever this icon appears. Click this icon to display the relevant information in the L4U Manual.
	Notes contain explanations of possible results or alternative methods of performing a task. These notes may also suggest best practices.
	Contains warnings about possible loss or damage of data.

Navigating Freedom

Navigating Freedom is quick and easy using the Freedom Toolbar (page 67) or the Freedom Dashboard. Individual functions within Freedom (ie: Library File, Acquisitions, etc) have their own Toolbar. Also, some of the buttons on the Dashboard will be different depending on which function you are currently in.



The Freedom Toolbar

Freedom Dashboard

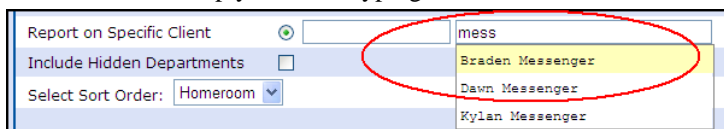
Once in one of the Freedom Functions, the *Freedom Dashboard* is available to navigate to a previous or next record as well as to Save your edits or to Cancel to discard your edits. Use the Freedom Dashboard navigation buttons (ie: Save, Next, Previous, Cancel, etc) and not the Internet Browser Forward and Back buttons.



Tips and Tricks for Data Entry or Data Management

The following tips are considered good practice when using an Internet Browser and will help you during your day to day activities.

- Press F11 on the keyboard to dismiss the Internet Explorer/Firefox navigation buttons. Press F11 to bring them back. More of the Freedom screen is now visible. Apple's Safari has similar commands via the View menu.
- Pressing TAB will take the text insertion point to the next entry field and SHIFT + TAB takes the text insertion point to the previous field.
- All fields with associated Authority Files or Control Files utilize drop down lists for easy entry. In the appropriate field, type in the first few characters and a list containing all matches will appear. Click the correct entry to select. If no match is found, simply continue typing.



- When entering data into a Control File field (Loan Type, Department, Location and so on), a complete list of all available codes can be viewed by typing @.
- To Delete a line of unwanted data, click the *X* icon to the right of the unwanted line and to Add, click the *Plus* icon.
- *Log Out* of Freedom instead of just closing the Internet Browser window. This will give you the chance to save your session (ie: bookbag, etc).

Company Profile

L4U Library Software has been developing library automation software since 1985 and our Management Team has been working with the educational marketplace since 1980. The Library 4 Universal™ product is the result of countless suggestions from users, prospects and librarians from all over the world.

L4U Library Software offers a complete range of products and services designed to meet the needs of the K-12 school library marketplace. All items are available in either Windows or Macintosh configurations.

- **L4U Enterprise** - Our main product is Library 4 Universal™ Enterprise. This is a platform independent school library management system designed for the K-12 marketplace. L4U Enterprise is a set of features designed for use in a centralized environment such as a school district. This solution consists of the L4U Enterprise Admin Utility software and L4U Freedom.
- **L4U Platinum Elite** - Platinum Elite is targeted for smaller installations and is ideally suited for this environment. L4U is sold in either Single User (Standalone) or Multi User (Network) configurations and supports Windows XP/Vista/7 or Macintosh OS 10.4.x or greater operating systems.
- **Library 4 Universal Add-Ons** - In addition to the L4U software, we offer additional products for use with L4U.
 - **Advanced Bookings** is a more robust and feature intensive version of L4U designed to facilitate the needs of a District Resource Centre or any other site requiring long term reservations and shipping controls.
 - **L4U iPAC and L4U Freedom** enables a library to publish its collection as a web site, thus allowing unlimited remote access for student searches through a standard HTML browser. In addition, L4U Freedom offers web access to most L4U Administrative functions used in day to day operations of a library.
 - **L4U Enterprise** is a set of features designed for use in a centralized environment such as a school district. This solution consists of the L4U Enterprise Client software and L4U Freedom.
 - **CheckMARC** is a MARC record collection from which you can search and obtain MARC records. CheckMARC is used directly from the Acquisitions area within the L4U program and is purchased as an online subscription.
- **Support Packages** - L4U Library Software provides various support packages which include options such as email, fax, phone and online technical support. Some support packages also contain product patches and upgrades.
- **Training** - Product Training is available in a variety of formats. Online training is available via a web connection as individual or packaged modules. Previously recorded training CD's are available on a variety of topics. Certified trainers are available for on-site training or in-house training (held at L4U Library Software head office).
- **RECON** - Retrospective Conversion Services are offered for customers that are not currently automated. This is a straightforward process where the library ships its traditional shelf list to our office and our staff converts this information to an electronic format known as MARC21. Once converted, these MARC records can be imported into any library management system including L4U.
- **Conversions** - Convert existing library management systems (MARC, MicroLIF, ASCII exports) to L4U format. L4U Library Software can convert

most automation systems to L4U without rebarcoding or re-entering your collection. Process and pricing vary depending upon the format of your current data.

- **Scanners, Printers and Consumables** - Barcode Labels of various sizes and formats, Label Protectors, Client Cards, Barcode Readers and printers, Portable Inventory Scanners and Slip Printers are also available from L4U Library Software

L4U Resources

There are several resources available to assist you with the L4U program. To completely understand and utilize all the functions and features available, we recommend you take advantage of these resources.

Show Me

Show Me is an audio visual tool that is designed to enhance your understanding of the L4U program. A pop up video explains what the feature does and how to use it. Look for this icon in key areas of Administrative L4U. If you are interested in purchasing Show Me and would like information and pricing contact:



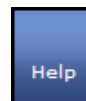
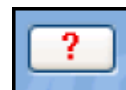
Sales@L4U.com

Training

Product Training is available in a variety of formats. Online training is available via a web connection as individual or packaged modules. Previously recorded training CD's are available on a variety of topics. Certified trainers are available for on-site training or in-house training (held at L4U Library Software's head office). Information on our Online training options can be found in Client Corner at:<http://www.L4U.com>

Context Sensitive Help

Context Sensitive Help is available throughout the iPAC and L4U Freedom wherever these icons appear. Click this icon to display the relevant information in the L4U Manual.



Support Packages

In a continuing effort to provide the best customer service possible, we offer a choice of support packages. They include options such as toll-free phone support, free upgrades, remote access for problem solving and access to tech notes. If you have purchased a support package, details are provided with your software package. If you are interested in purchasing support and would like information and pricing contact: **Sales@L4U.com**

Web Site

L4U users can keep up to date on the latest releases and news by visiting our web site. Useful Tech Notes and Frequently Asked Questions (FAQ's) can also be accessed from the web site. Visit us anytime:

<http://www.L4U.com>

Client Corner

Client Corner is a limited access area of the L4U Website (<http://www.L4U.com>). Clients with valid Support Packages are issued user ID's and passwords to view these pages. Information such as current software releases, Quick Tip Archives, Tech Notes and account information are all accessible using your password. Through Client Corner, you can request support, report a program defect and enter a feature request. All requests are automatically logged in L4U Library Software's internal client management system and reviewed by Support and Development technicians.

On-Line Help

L4U has the added feature of on-line help. If you are in the program and have a question, simply access the on-line help from within the program and you will be directed to a virtual manual. Simply click your way to an answer.

Email Support

Email is a wonderful tool for obtaining support for your L4U software. In addition to a quick response time, you also have the ability of attaching files such as screen shots and import files. The attached information helps the technician understand your particular concern much faster. To access our support department through email, simply send an email to:

Support@L4U.com

Listserver

All current accounts are added to the L4U Listserver. Subscribers will receive weekly tips and announcements regarding program updates, product releases and sales specials throughout the months of September to June. This is an optional service and users can unsubscribe at the click of a mouse.

Telephone Support

Telephone support is included with most Support Packages. This service can be available via a toll free number, 24 hours a day, 7 days a week. Our technicians will be happy to answer any questions that you may have about your L4U software. In order to answer your call as quickly as possible, please have the following information available.

- Customer ID #
- Library name
- A telephone number where you can be reached

- Whether this is a new call, or a previous incident (If it is a previous incident, please have the incident number available)

During the telephone support process you will be issued an incident number for your call. This incident number will remain with your support record indefinitely. If you are calling about an ongoing issue, simply provide the incident number to any technician and they will be presented with the complete call history.

At times, you may be asked to perform some tasks on the computer. If your phone is not next to the computer, you may have to complete the call with the technician, work on the computer, and then have the technician contact you again. For this reason it is imperative to have a number at which we can reach you. If your site has automated voice mail, please ensure our technicians know how to reach you for after hours incidents.

Real Time Support & Help via WebEx

Using Cisco WebEx Support Center, L4U Support can deliver instant, personalized remote support to users regardless of location. Using WebEx, L4U Support can shorten call times, increase first call resolution, minimize onsite service visits, and reduce overall support costs. WebEx services are available to all Support Packages that include call in support.

Chapter 1**Configuring iPAC & Freedom**

Configuring L4U iPAC	2
Enabling iPAC	2
iPAC Connection Types	3
Setting Configuration Options	5
Publishing the L4U iPAC	7
Search Options	9
Creating Picture Searches	15
Posting Messages on the iPAC	15
Creating Web Links	17
Federated Search	17
iPAC Customization	18
General Settings: Login Defaults	20
General Settings: Search Result Settings	21
Search Results Display Customization	23
Setting Web Privileges	27
Customized Search Results Display for a Homeroom	30
Freedom Customization	31

Chapter 2**Public Access Catalog (iPAC)**

Accessing the Internet Public Access Catalog (iPAC)	36
Navigating the iPAC	36
Searching Techniques	37
Viewing Search Results	44
Search Results Options	45
Federated Searches	52
Messages	53
New Items	53
Web Links	54
Working with Bookbags	55
iPAC Voting	58
Casting a Vote	59
Election Results	60

Chapter 3**Web Administration**

L4U On The Web	64
iPAC Login	64
My Profile	65
L4U Freedom Login	66
Freedom Profile	67
My Items Out & Renewals	68
Reserves	70
Send Bookbag by Email	71
My History	72

Basic Circulation on the Web	73
Circulation Period Hierarchy	76
Log Out	77
Quit iPAC	78

Chapter 4

Data Entry

Freedom Acquisitions	80
To Create an Item Record	82
Field Definitions	84
Common	84
CheckMARC	86
Main	87
Subjects	89
Description	89
Added Entries	90
Info	91
Resources	92
CheckMARC in Freedom Acquisitions	94
CheckMARC Setup	94
Cataloging with CheckMARC	94
Importing MARC Records	97
Search	101
Modifying Items	101
Duplicate	101
Clear All Selections	102
Delete	102
EZ Labels	103
Posting to the Library File	104
Modifying the Library File	106

Chapter 5

Data Management

Overview of Data Management	112
Quick Search	112
Quick Sort	112
Data Management Tools	113
View All	113
Subset	114
Mark Item	114
Delete	115
List Search	115
Library File	Query In 116
Topic Management	119
Globals	124

Chapter 6**Client/Patron Management**

Freedom Client Management	128
To Create a Patron	129
To Modify a Patron	132
EZ Labels in Client File	133
Homeroms	134

Chapter 7**Circulation**

L4U Freedom Circulation.	136
Enabling Freedom Circulation	136
Circulation in a Union Catalog with L4U Enterprise.	136
Checking an Item Out.	137
Checking an Item In	138
Locating Patrons and Items	138
Circulation Options	140
Items Out for a Patron	143
Lost Items	144
Renew Items	145
Placing Reserves in Freedom Circulation	146
Fine Payments	148
Circulation Alerts	152
Temporary Barcodes	154
Circulation Period Hierarchy	154

Chapter 8**Reserves**

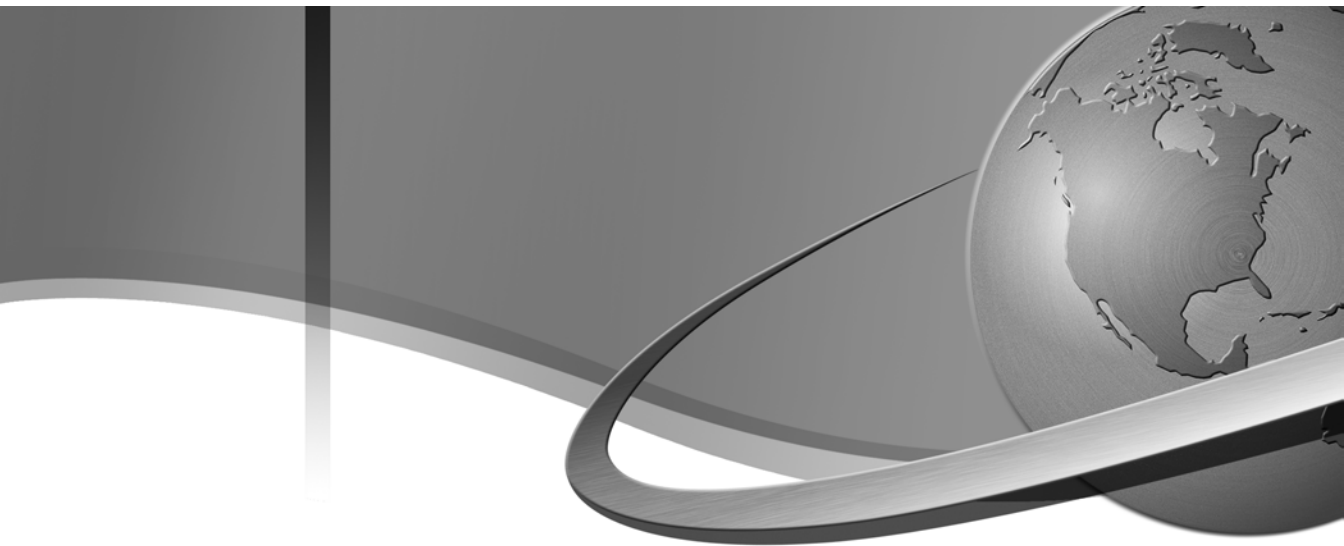
Placing Reserves.	158
Reserves in a Union Catalog with L4U Enterprise	158
Viewing and Modifying Reserves	159

Chapter 9**Inventory**

Inventory on the Web	162
Best Practices	162
Enable Inventory	163
Counting Inventory.	163
Inventory Reports	166
Turning Inventory Off	167

Chapter 10**Reports**

Online Reports in L4U Freedom	170
Item Reports	170
Patron Reports	176



CHAPTER 1

CONFIGURING IPAC & FREEDOM

- Enabling iPAC and Connection Types
- Setting Configuration Options
- Publishing the L4U iPAC
- Allow Reserves/Bookings from the Web
- Authority vs. Item Display in the iPAC
- Creating Topic Searches
- Messages & Web Links
- Federated Search Settings
- iPAC Customization
- Customizing the Search Results Display
- Setting Web Privileges: iPac and Freedom
- Homeroom Customized Search Results

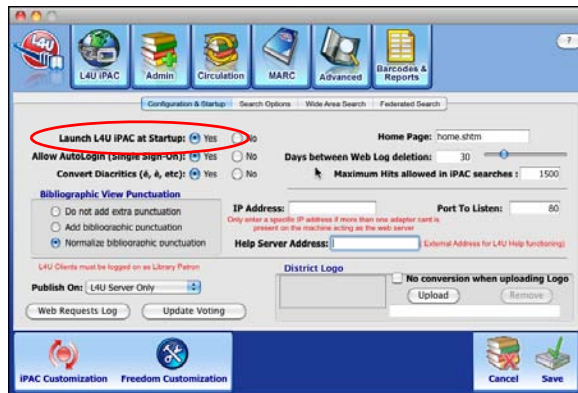
Configuring L4U iPAC

The iPAC (Internet Public Access Catalog) is the interface that patrons use to access the library collection. Patrons can search, view details, sort result lists, create book-bags and if licensed for L4U Freedom, much more. L4U Freedom is the web version of the L4U Admin Utility. Before any connections can take place, the L4U iPAC must be configured in Preferences in the *L4U Platinum Elite Admin Utility* or the *Enterprise Admin Utility*.

Enabling iPAC

The L4U iPAC must be enabled in Preferences prior to connecting with a browser. This is required regardless of the type of connection(s) patrons will be using. To enable iPAC:

1. *File > Preferences*
2. Click *L4U iPAC*
3. Select the *Configuration & Startup* tab
4. For *Launch L4U iPAC at Startup*, click *Yes*
 - This should be the default settings for any blank or converted data file supplied by L4U Library Software
5. Select any other required options
 - see “Setting Configuration Options” on page 5 for an explanation of available options.
6. Click *Save*
7. *File > Quit* to exit L4U
8. Restart L4U



iPAC Connection Types

iPAC Connection Types are either Internal or External. The Internal iPAC may be accessed directly from within *L4U Admin Utility* by clicking *Start the iPAC* at the *Login Screen* (see “Login Screen” on page 17 in the *L4U Users Manual*). The Internal iPAC does not support iPAC Search Results Display features or Freedom functions.

An External iPAC connection is an internet browser running on any other computer on the L4U computer’s intranet or internet.

L4U installations that are licensed for L4U iPAC or L4U Freedom have an unlimited number of connections via the Internet. This license can be applied to either Single User or Multi User configurations.

iPAC (LAN Client)

The Internal iPAC differs from the web client iPAC, because it can be converted to an Administration station by changing password levels. Click the *Start the iPAC* button to access the Internal iPAC when first starting the L4U program. If currently in an Administration screen, access the Internal iPAC by Selecting, *File > Change Password Level* and click *Start the iPAC*. The Internal iPAC has a limited feature set compared to the External iPAC.

iPAC (Browser)

Users that are licensed for L4U iPAC or L4U Freedom, have an unlimited number of connections to their collection. Patrons connect to the collection from a browser on any Intranet or Internet enabled computer. To connect to L4U from a browser:

1. Launch a web browser on any Internet connected computer
2. In the *Address* field, Enter the IP Address of the L4U iPAC computer
 - This is usually an L4U Server (Enterprise or Platinum Elite) or L4U Single User
3. Click *Go* or Press ENTER
4. The L4U iPAC will load and the main search page will display



Note: L4U Platinum Enterprise/Elite 3.1 works with the current versions of the following internet browsers: Apple Safari, Microsoft Internet Explorer, Google Chrome & Mozilla Firefox. To access the L4U iPAC easy, create a shortcut on the desktop or create a bookmark in the browser.

Locating an IP Address

In order to connect to the server from a browser, it is necessary to know the IP (Internet protocol) address of the computer publishing the library collection. It is easy to determine the IP address in L4U:

1. With *L4U Admin Utility* running, do one of the following
 - Application Menu (*L4U Elite* or *L4U Admin Utility*) > *About L4U* (Mac OS)
 - *Help* > *About L4U* (WIN)
2. The IP Address of the L4U Server is displayed in the *Server IP Address* field

If the IP address(es) of the server is not known, consult a computer technician to help with the following steps.

Macintosh OS X (10.5 - 10.7)

1. *Apple* menu > *System Preferences*
2. Click *Network*
3. From the *Sidebar*, click on the interface that has a status of *Connected*. For desktop computers this is usually *Ethernet*; for portable computers, it is usually *Airport* or *Wireless*.
 - The machines IP Address is displayed

Windows 2003/XP/Vista/Windows 7

1. *Start* > *Run*
 - Windows 7 Users, just click the *Start* button
2. Type **CMD** and click *OK*
 - Windows 7 Users, just press ENTER
3. In the DOS screen that pops up, type **IPCONFIG**.
4. Press ENTER
 - The machines IP Address is displayed

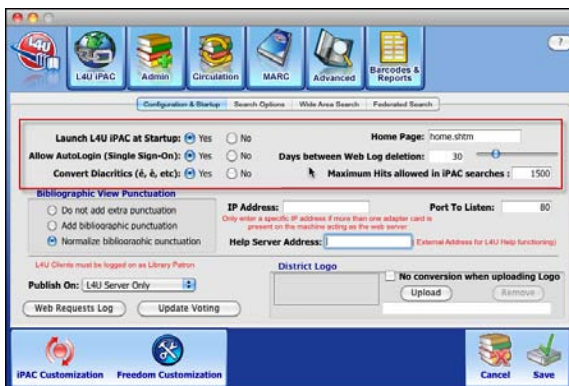
Record the *IP Address* exactly, including periods (dots). This IP address is used in the address bar of the Internet Browser program to access the library records. Use the format: **http://IP Address:Port Number** where the *IP Address* is the series of numbers determined above and the *Port Number* is the port number set in Preferences, see “Publishing the L4U iPAC” on page 7. A *Port Number* is only required if the default port 80 is not used. An example of an address would be **http://139.142.220.198:8080**, which would be acceptable for a Mac L4U Server.



Note: For most configurations the computer acting as L4U iPAC Server must have a static IP address. If unsure whether your computer has a static IP Address, please consult your local computer technician.

Setting Configuration Options

When setting up the L4U iPAC server there are a number of options to consider. For Example: which computer will publish the collections, what language will the iPAC be displayed in, how to customize the look of the iPAC, etc. The following pages describe these options and how to set them up. These options are found at *File > Preferences > L4U iPAC > Configuration & Startup*.



Allow Auto Login

This option must be enabled to allow Auto Login to the iPAC. Requires Active Directory and Internet Explorer 9. Please refer to “iPAC Auto Login” on page 24 of the *L4U Users Manual*.

Convert Diacritics

The convert diacritics option is used for collections that contain materials cataloged in languages that employ diacritics (accents). The diacritics must be converted from either the Macintosh or DOS character set to the ISO character set. In other words, the accents must be converted to display correctly on a web browser. This option is not necessary for collections that do not contain diacritics and by turning this setting off response time may improve. To ensure that diacritics display correctly:

1. *File > Preferences*
2. Click *L4U iPAC*
3. Beside the *Convert Diacritics (é, è, etc.)* option, click *Yes*
4. Click *Save*

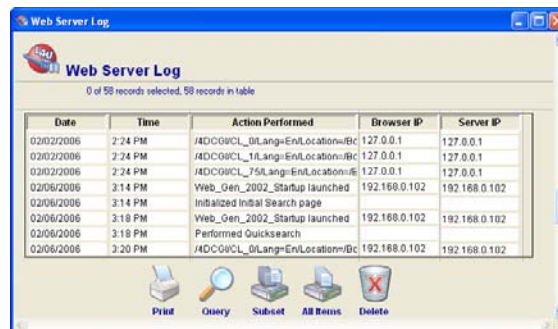
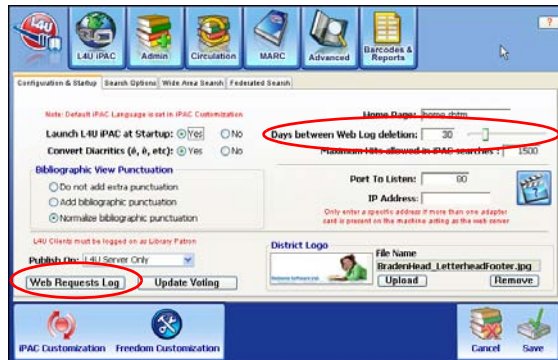
Home Page

The Home Page is the first page displayed when a patron accesses the iPAC. By default this page is set to *home.shtml*. The start or home page of the iPAC can be changed; however, this should only be done by someone knowledgeable in web design and under the direction of L4U Software Support.

iPAC Server Log

All activity on the iPAC that is conducted via a browser is logged in the Web Server Log. This log contains the IP address of a computer making a request, when the request was made, what the request was and the IP of the Server that responded. This information is accessed through Preferences. Additionally, you can decide how long you would like to retain this information. To access the web log options:

1. *File > Preferences*
2. Click **L4U iPAC**
3. By entering a value in the field provided or by using the slider to right of the field, Enter the number of *Days between log flush*
 - This is the length of time you wish to maintain the web server log and is flushed automatically.
4. To view the web activity, click the *Web Requests Log* button
 - Exit the log by closing the window
5. Click **Save** to exit the Preferences screen.



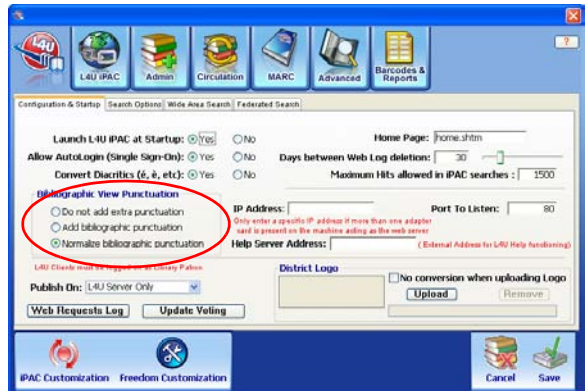
Maximum Hits allowed in iPAC Searches

Any time a search is conducted, L4U compiles a list of hits that comply with the search criteria. By setting a maximum, the Administrator can limit the number of returned hits per search. This becomes especially useful when a patron enters a vague or broad search criteria. A search result consisting of hundreds of records may be overwhelming to a new or younger user, as well as slow down the network. To set the maximum number of hits allowed enter the preferred value in the field provided. 1500 is the default value and recommended.

Bibliographic View Punctuation

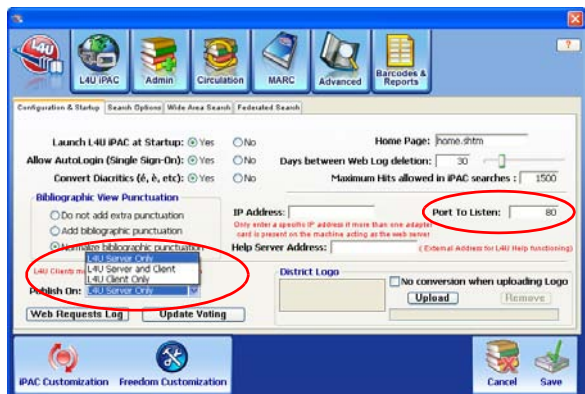
If Search Results Display is set to display in Bibliographic view (see “Bibliographic” on page 45), these options will attempt to correct punctuation inconsistencies in the collection to conform to the *Modern Language Association* (<http://www.mla.org/>) guidelines. The L4U data is not affected, only the iPAC display of the data. To modify these settings:

1. *File > Preferences*
2. Click *L4U iPAC*
3. The options in Bibliographic View Punctuation are:
 - *Do not add extra punctuation*: Display the data unaltered.
 - *Add bibliographic punctuation*: Add appropriate punctuation between the fields (e.g.: author, title, publication information, etc.)
 - *Normalize bibliographic punctuation*: Add or omit appropriate punctuation where necessary.
4. Click *Save* to exit the Preferences screen.



Publishing the L4U iPAC

The L4U iPAC Server is an integrated component of the L4U application and does not require a separate server. In a single user installation, the same machine running L4U is also the iPAC Server. However, multi-user installations can be configured to publish the collection from either the L4U Server, the Patron's computer(s) or both. This flexibility is useful for accommodating firewalls, and allowing for the display of different iPAC skins simultaneously. By default the iPAC Server publishes on the L4U Server or for a Single User L4U installation on the L4U computer using Port 80, but this can be changed



for network security requirements. Mac OS X can use port 8080 as default or use another available port. To change these default settings:

1. *File > Preferences*
2. Click *L4U iPAC*
3. Select the *Configuration & Startup* tab
4. In the *Port To Listen* field, Enter the required port.
 - Ensure the port entered has been opened on the network.
5. From the *Publish On* drop down list, Select which computer(s) patrons will access via their web browser.
6. Click *Save*



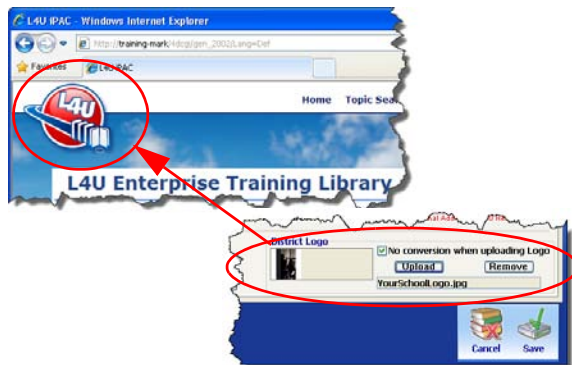
Note: Log in as *Library Patron* at the *L4U Platinum Elite Admin Utility* station to publish the iPAC at that station.

Multi-Homing

If the computer used for L4U iPAC Server has two network cards and you only want to use one for the iPAC server, L4U system settings must be changed. Go to *File > Preferences > L4U iPAC > Configuration & Startup* tab. Enter the *IP Address* of the network card to be used. Click *Save*. If the L4U Server doesn't have multiple network cards and it is desired to have L4U publish on the IP Address assigned to the built in Network Card then leave this field blank.

District Logo

Use this feature to display another graphic in place of the L4U logo which appears in the iPAC and Freedom pages. Locations can have their own Logo and if defined, will override this setting in Preferences.



Requires Quicktime™

installed on the L4U Server computer. For better blending of the logo image with the web page the image file should be in either PNG or GIF89 format and should have no background. Using JPEG images is acceptable but not recommended. The maximum size of the placeholder on the web page for the logo is 94 x 315 pixels. It is recommended to create a logo image with exactly 94 pixels of height or less and a width of 315 pixels. The image will be resized if it exceeds the size of the placeholder. Resizing may lead to picture quality deterioration.

To change the graphic:

1. *File > Preferences*
2. Click *L4U iPAC* (if necessary)
3. Click *Upload*
4. Click *OK* at the Quicktime warning
5. Click *OK* at the Image Type alert
6. Click *Upload*
7. Navigate to the new graphic and Click *Open*
 - An alert will display if the graphic does not meet recommended specifications
8. Click *Save* to exit the Preferences screen.



Note: *No Conversion When Uploading Logo:* Enable this setting if the desired graphic meets the requirements and the graphic background is still opaque on the L4U web pages. Repeat steps 1 thru 6 above, but check this option before clicking Save. The graphic is then stored externally on the Enterprise Server in the *Server\Server Database\Web\images\Logo* folder and not in the Current Datafile.

Update Voting

This button gives access to the Elections Module. Please refer to “Setting Up an Election” on page 290 in the *L4U Users Manual* for more information.

iPAC and Freedom Customization

Please refer to page 18 for more information on customizing the default look of the iPAC and “Freedom Customization” on page 31 for Freedom customization options.

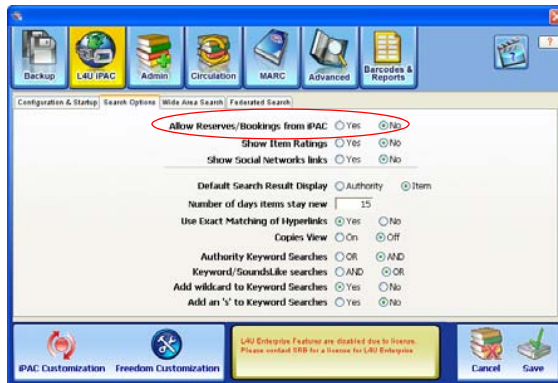
Search Options

There are a number of options available concerning searching and display within the iPAC. These include the default boolean operators used when phrase searching, the format in which search results are displayed, and how hyperlinks are utilized.

Allow Reserves/Bookings from the Web

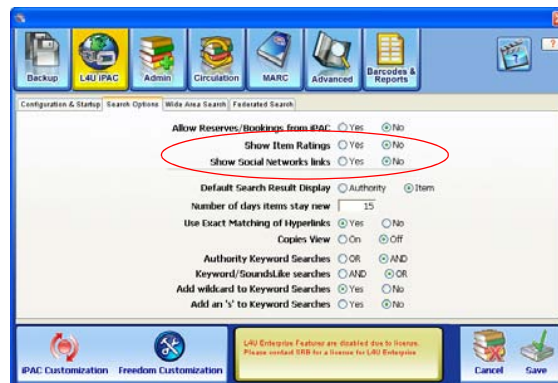
If licensed for L4U Freedom, you can choose to allow or disallow item reserves to take place from the Web. To set this option, *File > Preferences > L4U iPAC > Search Options* tab and click in either *Yes* or *No* beside *Allow Reserves/Bookings from iPAC*. This setting turns Web reserves on or off for *all* patrons. If you wish to allow reserves for some or all

patrons, you then configure the Web Privileges in Homerooms. Please refer to “Setting Web Privileges” on page 27 for more information on how to configure these options. For more information on placing reserves via a web browser, see “Reserves” on page 70 or, if placing reserves from Freedom Circulation, see “Placing Reserves in Freedom Circulation” on page 146.



Show Item Ratings

If licensed for L4U Freedom, you can choose to allow or disallow the display of Item Ratings. To set this option, *File > Preferences > L4U iPAC > Search Options* tab and click in either *Yes* or *No* beside *Show Item Ratings*. This setting prevents patrons from seeing this feature and rating items. Please refer to “Book Ratings” on page 49 for more information on how to place and view Item Ratings.



Show Social Network Links

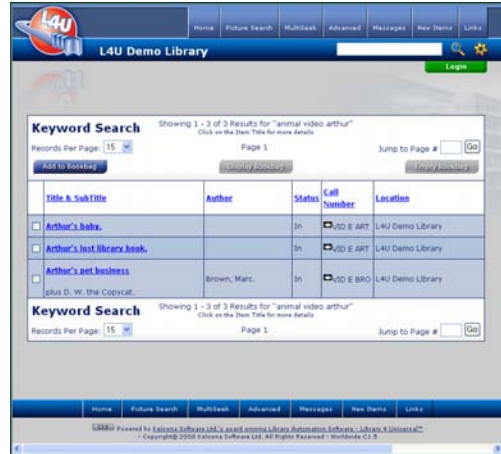
Social networking links are available so patrons can like and share their favorite books with friends via Facebook, Twitter, My Space and other popular sites. Enabling this feature may frustrate some patrons if these features are blocked by your IT Department or District policy.

Authority vs. Item Display

Display of search results within the iPAC fall into two categories: by *Item* or by *Authority*.

Item

Item display shows the patron the individual library items in more detail from the search result list. This is best option if the library has a wide variety of users and different ages. *Item* display may also show duplicate items, depending whether Copy Management is enabled or not. All items will show as separate items if Copy Management is not enabled Please refer to “Copies View” on page 13.



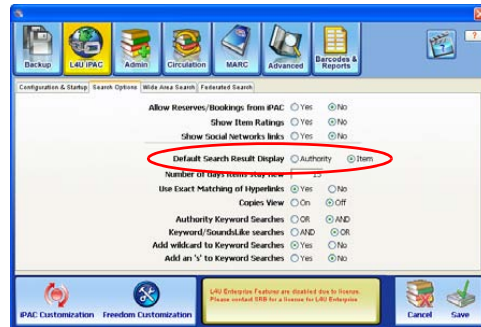
Authority

Using *Authority* display of search results shows as a list of hits matching the search criteria and the number of items attached to it. Example: When searching Author, the resulting list will be of Authors' names only, with the number of library items by those individuals. The user may then click on a specific Author to view all items by that Author. *Authority* display is not available for Keyword or SoundsLike searches.



To select which format search results are displayed in:

1. *File > Preferences*
2. Click *L4U iPAC*
3. Select the *Search Options* tab
4. Under *Default Search Display*, Select either *Authority* or *Item*
5. Click *Save*



New Items Search Options

The L4U iPAC uses a toolbar that is consistent throughout all screens and can be found at the top and bottom of each page. This toolbar has a *New Items* button. This is used to quickly view all items that are new to the collection. By entering a value (number of days) in Preferences, the librarian can determine how long an item is considered 'new'. L4U determines whether an item is deemed new by comparing the current date to the *Entry Date* of the item plus the value entered in Preferences. To adjust this value, go to *File > Preferences > L4U iPAC > Search Options* and Enter the desired value in the field provided for *Number of days items stay new*.

Matching of Hyperlinks

When a patron views the item details of a specific record, some of the data appears as a hyperlink. For Example: Author, Series, Subjects. Patrons can click these links to perform searches using the hyperlink data. For Example: While viewing the item detail of a record the patron clicks the Author name which displays as a hyperlink, [Atkins, Peter William](#). A search is then conducted using **Atkins, Peter William** as the search criteria. When the Preference option *Use Exact Matching on Hyperlinks* is set to *Yes*, L4U will only return records that contain author data that exactly matches the hyperlink. If this Preference option is set to *No*, L4U will return items with author entries that contain Atkins or Peter or William. To adjust the Hyperlink option, go to

File > Preferences > L4U iPAC > Search Options and Select either *Yes* or *No* for the *Use Exact Matching of Hyperlinks* option.



Copies View

The iPAC will display all copies of the items by default. If this option is selected, search results will show only one copy of an item that has multiple copies. Copy Management has to be enabled in Preferences for this feature to work. For more information on “Copy Management” on page 38 in the *L4U Users Manual*.

- With Copies View enabled:

Title & SubTitle	Author	On Shelf	Call Number	Location
<input type="checkbox"/> Horcsting hope: the story of Cesar Chavez /	Krull, Kathleen.	1 of 1	021 CHA	Local Library
<input type="checkbox"/> I have a dream.	King, Martin Luther, Jr.	0 of 1	021.34 KIN	L4U Demo Library
<input type="checkbox"/> If you lived 100 years ago.::	McGovern, Ann.	2 of 2	074.7 MCG	Local Library
<input type="checkbox"/> Illustrated history of Canada, The		15 of 16	071 ILL	Local Library

- Without Copies View enabled:

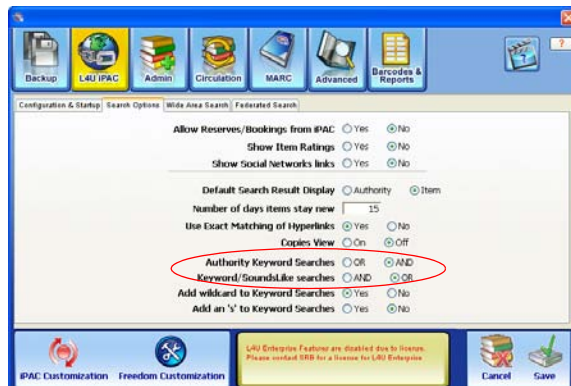


Combining Search Terms

When a patron uses more than one word as their search criteria, L4U can handle the search using one of two boolean operators as the default. If the default is set to OR, a more expansive list of items will result. For Example: If a patron enters Dog Cat as the search criteria, the results will include item records containing the words Dog or Cat or both Dog and Cat. The more restrictive, or more accurate search, would be an AND search. Using the same example, the results would include only item records containing the words Dog and Cat. Search types available on the Home page of the iPAC are Keyword/Soundslike and table specific searches (i.e. Subject, Title, Author, Series, Ed/Illus). For more information on iPAC searches, see “Searching Techniques” on page 37. The default operator for these two types of searches are set up separately. To set the default operators:

1. *File > Preferences*
2. Click *L4U iPAC*
3. Select the *Search Options* tab
4. For the *Authority Keyword Searches*, Select *OR* or *AND*
 - This operator is used when searching Subject, Title, Author, Series, and Ed/Illus
5. For the *Keyword/SoundsLike searches*, select *AND* or *OR*

- This operator is used when searching Keywords, SoundsLike and pressing ENTER



6. Click *Save*



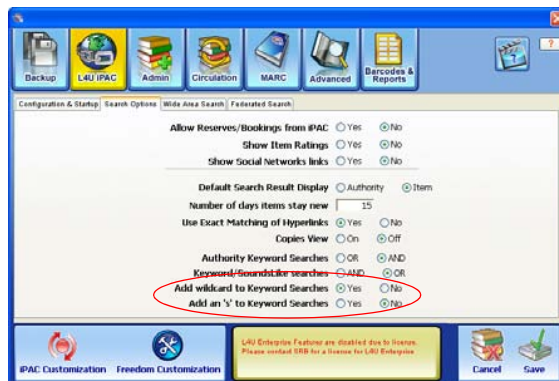
Note: All blank data files and conversion data files provided by L4U Library Software will have the Preference default for all searches set to AND.

Keyword Search Options

By default, iPAC keyword searches perform a *Starts With* search. In other words, a Keyword search of *cat* would return, catatonic, catch, Catholic, etc. This functionality can be changed so only items are found where the keyword is equal to the search criteria. In the same example, the search would return Cat In The Hat, Cat Goes Fiddling, The Dog and the Cat Go Out, etc. Searches can automatically be pluralized as well.

To set these options:

1. *File > Preferences*
2. Click *L4U iPAC*
3. Select the *Search Options* tab
4. For the *Add wildcard to Keyword Searches*, Select *Yes* or *No*
 - If set to No, L4U will find only items where the keyword is equal to the search term.
5. For the *Add an 's' to Keyword Searches*, select *Yes* or *No*
 - This setting is only applicable if the *Add wildcard* is set to *No*.
6. Click *Save*



Creating Picture Searches

This L4U Platinum v2.3 and earlier feature has been replaced by Topic Search. L4U Enterprise or L4U Platinum Elite users should refer to “Query In Library File” on page 116 on how to configure L4U Freedom Topic Searches.

Posting Messages on the iPAC

The equivalent of an electronic message board can be accessed from the iPac. This feature allows Administrators and Librarians to post messages for patrons and is ideal

for communicating upcoming events, library closures or news updates. If licensed for L4U Enterprise, specific locations can have unique messages just for that location



Creating and Editing Messages

1. *Other > Messages*
2. Select the language to edit the message in and click *OK*
3. Click *Add* to Create a New Message or Double Click one of the message headings to Edit.
4. Enter a Topic in the *Topic* field
5. Enter a Description
 - Enterprise users may be able to select the Location this message is applicable
6. Click *Done*
7. Repeat Steps 4 to 5 for all messages to be entered
8. Click *Done*
 - To edit messages, Repeat Steps 1 - 3. Highlight the text to change and enter the new message information
 - These new or edited messages will be immediately available for viewing via the iPac

To Edit Message Headings

1. *Other > Messages*
2. Select the language to edit the messages in and click *OK*
3. Double Click the desired message
4. Click in the Topic Heading to make the changes
 - Message headings may be up to 20 characters long
5. Click *Done*
 - The message headings displayed in the iPac will immediately reflect these changes

Viewing Messages from the iPac

1. From the iPac home page, click *Messages*

2. Click a message heading to display the message
3. Once finished viewing the message, click the *Back* button on the browser to view further messages, or click *Home* to return to the iPac home page

Creating Web Links

The L4U user has the ability to add Web Links to the iPAC Home page. This means that any patron connecting to the library via the Internet will also be provided with direct links to other related web sites. These Web Links can be added to and revised as necessary. As with Messages, L4U Enterprise administrators can assign specific Web Links to certain locations and not others.

Adding a New Site

Once the iPAC Server has been set up, the library administrator can add as many Web Links as they choose. Web Links are maintained in the Library Profile, where additions and deletions can be performed. To add a Web Link to the Web Page:

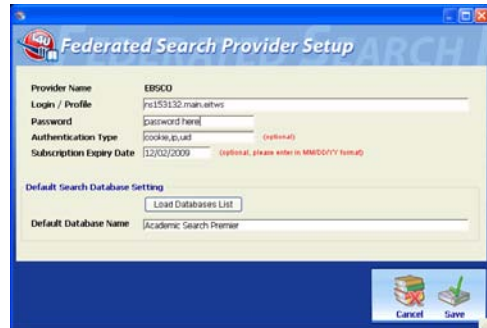
1. *File > Library Profile*
2. Click *Web Links*
3. Click *Add Site*
4. Enter the *Site Name*
5. Enter the *URL* (Universal Resource Locator)
6. The URL must include *http://* at the beginning of the address.
7. Enter a brief *Description* of the web site
8. Click *Update*
 - L4U Enterprise administrators can assign a Location or select All Locations as appropriate
9. Click *Save*
 - see “Web Links” on page 54 for information about viewing the links



Federated Search

The L4U iPAC can search different databases in the deep web depending on which service the L4U site is licensed for. This licensing and login information is entered in Preferences and is supplied by the service provider. Two service providers, EBSCO and Encyclopædia Britannica, are supported in Platinum Elite and Enterprise. More providers are planned, but this depends on the service providers licensing and marketing plans. To enter a service providers licensing/login information:

1. *File > Preferences*
2. Click *L4U iPac*
3. Select the *Federated Search* tab
4. Click *Setup* for EBSCO
 - EBSCO will be used in this example, other providers will be similar
5. Enter the information as supplied by EBSCO. For example,
 - *Login/Profile*: also known as the Authentication string
 - *Password*: enter the password as supplied
 - *Authentication Type*: enter the information exactly as supplied by EBSCO
6. Click *Save*
7. Click *Enable* checkbox for EBSCO
8. Click *Save* to close Preferences



Some Service Providers may allow access to only certain databases depending on your subscription. To select the default database to search:

1. Reopen *Preferences*
2. Click *L4U iPac*
3. Select the *Federated Search* tab
4. Click *Setup*
 - EBSCO may allow access to only certain depending on your subscription
5. Click *Load Databases List*
6. Select the desired Default Database to Search from the *Default Database Name* drop down list
7. Click *Save* to save the edits
8. Click *Save* to close Preferences

iPAC Customization

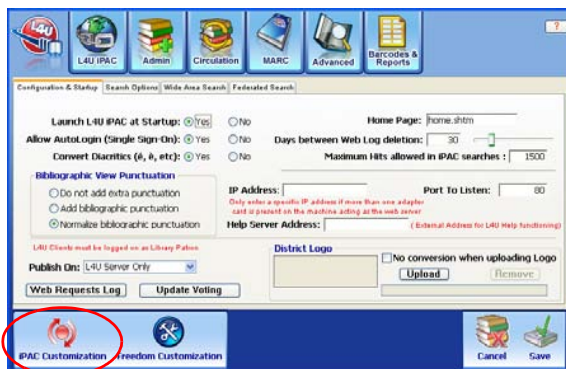
L4U gives you the ability to easily customize the look of the iPAC, what features to have enabled and how information is displayed. You can create a customized display to use as a default for your library in Preferences. This defines the look of the iPAC and search results in List View as displayed to all patrons. If licensed for L4U Freedom, you can also customize the display for individual Homerooms, see “Creating a Customized Search Results Display for a Homeroom” on page 30. In this case,

patrons who are not logged in will see the display as specified in Preferences. Once patrons log in, the search results will be displayed as specified in their Homeroom.

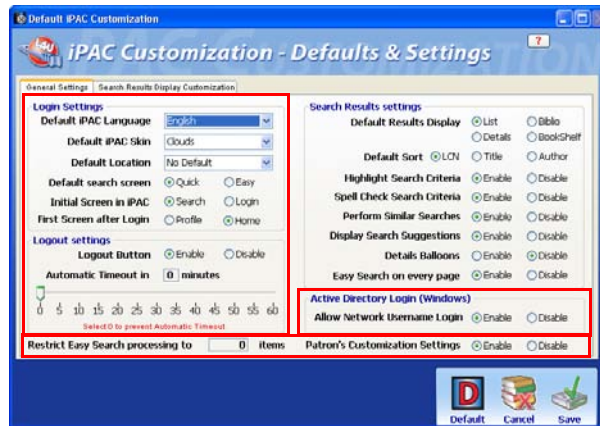


iPAC Customization - Defaults & Settings

1. *Files > Preferences*
2. Click *L4U iPAC*
3. Click *iPAC Customization*
 - *Freedom Customization* is discussed on page 31.
4. *iPAC Customization - Settings & Defaults* screen will appear with two tabs:
 - *General Settings* which is described below
 - *Search Results Display Customization*, “Search Results Display Customization” on page 23



General Settings: Login Defaults



Default iPAC Languages

L4U can display the iPAC screens in one of three Languages; English, French or Spanish. The Language selected will affect the buttons and alert messages that appear when patrons use the iPAC functions. This setting does not convert the data within your collection, only the interface that displays your materials. The Language selection will only apply to the iPAC, and will not affect any other levels of L4U. Both the default language display and the language used for a specific session can be modified.

Default iPAC Skin

The appearance of the L4U iPAC can be changed by simply selecting a different skin. A skin will change the look of the dialog boxes, buttons, etc. of the iPAC interface. The different skins available are selectable from the drop list.

Default Location

The different Locations available in L4U Enterprise are selectable from the drop list. Locations are created and maintained in the Locations Control File, which is covered in more detail on page 78 in the *L4U Users Manual*.

Default Search Screen

Easy Search will present the iPAC user with one search field to search the collection. This may be the best solution for younger patrons. Quick Search offers more search options for the patron. Please see “Searching Techniques” on page 37.

Initial Screen in iPAC

L4U Freedom administrators have the option to select which screen end users will see when the iPAC first opens. Select *Login* to force patrons to log in to use the iPAC. After logging in, the *iPAC Customization & Default Settings*

for their current homeroom will override the global iPAC Customization Settings.

First Screen after Login

L4U Freedom administrators have the option to select which screen the end user will see after logging into the iPAC. *Home* will present the standard iPAC search screen and is the preferred option for a typical library patron. Select *Profile* if the end user will use L4U Freedom.

Restrict Easy Search Processing

This setting allows administrators of large districts to lower the CPU load when performing concurrent phrase searches in Easy Search results. These settings should only be adjusted if directed to do so by L4U Library Software Support Department.

Patron's Customization Settings

Patrons will be able to modify the iPAC Search Results from their web browser if enabled. The setting in *iPAC Customization & Default Settings* for their current homeroom will override this setting.

Active Directory Login

If this is enabled, then the patron can also login into the iPAC using their Windows network credentials. Please see “Active Directory Integration” on page 23 of the *L4U Users Manual* for more information.

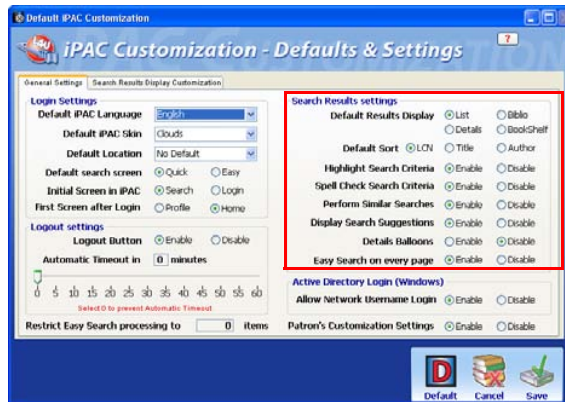
Logout Settings

If a Logout button is required, select the Enabled option. Select an Automatic Timeout if desired. If 0 (zero) is entered, the automatic timeout will not automatically occur.

General Settings: Search Result Settings

These options will allow the librarian to customize the iPAC Search Results to their patrons' needs. When a search is entered in L4U iPAC, the results can be displayed in a variety of styles. L4U gives you the ability to easily customize these options. For

more information on these options and how they appear in the iPAC, please refer to “Viewing Search Results” on page 44.



Default Results Display

- *List*
This is the basic view of the search results which can be customized. Please refer to page 23 for more information.
- *Details*
This option shows the patron the individual library items in more detail including bookcover.
- *Biblio*
The results list is similar to the Details view but in bibliographic format.
- *Bookshelf*
This will show your search results in a bookshelf format.

Default Sort

The results list can be sorted in one of three ways. LCN will sort in shelf list order, etc. Default Sort direction is in ascending order.

Highlight Search Criteria

This option will highlight the search terms in the resulting lists.

Spell Check Search Criteria

When performing a single field search (i.e.: not Multiseek) and no or few results are displayed due to spelling error, L4U will check the spelling based on the actual items in the Library file and suggest alternative searches based on the correct or alternative spelling.

Perform Similar Searches

If enabled, author searches will display other authors based on the subjects in the list of results.

Display Search Suggestions

When few or no results are returned due to complex multiword searches, L4U will list different combinations of the search terms and the number of items found using those combinations.

Details Balloons

L4U will present a pop up balloon which contains the item's bibliographic information when the cursor hovers over the title of the item.

Easy Search on Every Page

The Easy Search button will appear on every page of the iPAC.



Note: To restore the display to the default display settings, click *Default*

Search Results Display Customization

When a search is entered in L4U iPAC, the search results are displayed in List View. The user can then click a link to view an item's details. L4U gives you the ability to easily customize the List View for your library. If licensed for L4U Freedom, the List View can be customized for individual homerooms, allowing you to present different levels of information to different groups of patrons. Please see "Creating a Customized Search Results Display for a Homeroom" on page 30 in this chapter for more information on Homeroom customization.

	Title & SubTitle	Author	On Shelf	Call Number	Location
<input type="checkbox"/>	Chicken soup for the Canadian soul stories to inspire and uplift the hearts of Canadians /	Confield, Jack.	1 of 1	● 150 CAN	KSL Senior School
<input type="checkbox"/>	Kids book of Canada's railway. The and how the CPR was built /	Hodge, Deborah.	1 of 1	● 385.0971 HOD	KSL Senior School

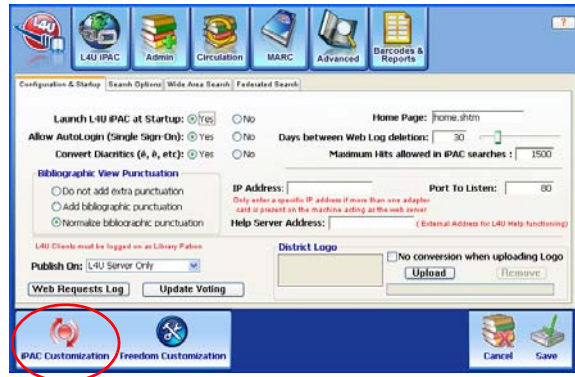
Default Search Results Display

	Title & SubTitle	Author	Call Number	On Shelf	Media Name *	Copy	Pages
<input type="checkbox"/>	Adventures in ancient Egypt	Bailey, Linda.	● 932 BAI	1 of 1	Paperback	1	48 p. ;
<input type="checkbox"/>	Aloha in an untamed land	Trotter, Maxine.	▲ FIC TRO	1 of 1	Miscellaneous	1	216 p. ;
<input type="checkbox"/>	Arizona Charlie and the Klondike Kid	Lawson, Julie.	● 971 LAW	1 of 1	Hardcover Book	1	[30] p. ;

Customized Search Results Display for Teachers or a Resource Centre

To access Search Results Display Customization and set the defaults:

1. *File > Preferences*
2. Click *L4U iPAC*
3. Select the *Search Options* tab
4. Click *iPAC Customization*
 - *Freedom Customization* is discussed on page 31.
5. Click *Search Results Display Customization*
6. The steps continue on page 25



Selection of Fields to Display

You can choose what columns of information are displayed in List View. This allows you to select the fields to be viewed which are of use to your patrons.

Customizing Column Labels

This feature allows you to replace any column labels which may be unfamiliar to your patrons with more meaningful labels. You may customize the labels in English, French and Spanish. This setting does not convert the data within your collection, only the column labels of the search results display.

Adjusting Column Width

How much space is allocated to each column of the display can be easily adjusted. Please refer to the screen shot below.

Specifying Page Width

The width of the table returning the search results may be specified as *Automatic* or *Fixed*. If *Automatic* is used, the width of the table displaying the search results will be determined by the monitor settings of the patron. In this case, the size of the columns is shown as a percentage of the table. Alternatively, you may set the table width to a fixed width of a specified number of pixels. In this case, the size of the columns is shown as both a percentage and an number of pixels.

Display Rank in Easy Search

This will display the rank of the hit in the results screen. Please see “Easy Search” on page 37 for more information.

Cont'd from previous page

7. Choose which fields to display from the table under *Please select the Columns to display from the list below*.

- To add a field to the display, click the field's check box.
- To delete a field from the display, click the field's check box to uncheck it.

Homeroom iPAC Customization

iPAC Search Results Display Customization

General Settings | Search Results Display Customization

Title & SubTitle	Author	Sta...	Call Number	Levels	Media Code
35%	17%	6%	14%	15%	13%

Please select the Columns to display from the list below:

Column	Column Label in iPAC
<input type="checkbox"/> Duration	Duration
<input type="checkbox"/> Edition	Edition
<input type="checkbox"/> Editor Illustr	Editor Illustr
<input type="checkbox"/> Entry Issue	Entry Issue
<input type="checkbox"/> ISBN	ISBN
<input type="checkbox"/> LCCN	LCCN
<input checked="" type="checkbox"/> Levels	Levels
<input type="checkbox"/> Loan Type Code	Loan Type Code

* These fields are NOT portable in iPAC

Edit Labels for IPAC Language

☒ English ☐ French ☐ Spanish

Page width determination

☒ Automatic ☐ Fixed Width of pixels

☐ Display Rank in Easy Search

NOTE: This Customization will only affect List Displays

Default Cancel Save

8. Change the column label for a field by clicking on it and then clicking on it again (a slow double click). Enter the new label for the field

- To modify the labels for a different language, change the language by clicking on one of the three languages' radio buttons under *Edit Labels for IPAC Language*.

9. Adjust the space allocated to a column by pointing the mouse at the divider between two columns in the preview area and then click and drag the divider.

Homeroom iPAC Customization

iPAC Search Results Display Customization

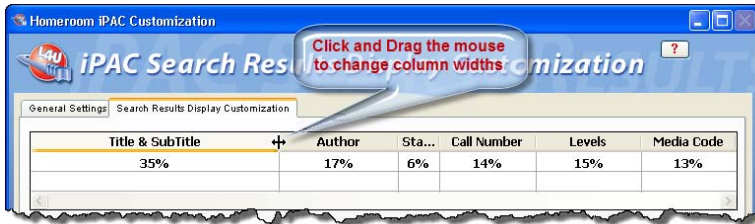
General Settings | Search Results Display Customization

Accession Number	Title & SubTitle	Author
17%	30%	17%

Please select the Columns to display from the list below:

Column	Column Label in iPAC
<input checked="" type="checkbox"/> Accession Number	Barcode
<input checked="" type="checkbox"/> Author	Author
<input type="checkbox"/> Author2	Author2
<input type="checkbox"/> Copy	Copy
<input type="checkbox"/> Cutter	Cutter
<input type="checkbox"/> Department Code	Department Code

- You may also click the row containing the percentage figures (or number of pixels if *Page Width Determination* has been set to *Fixed Width*) for the display, click on a specific number and enter a new value.



10. Beside *Page Width Determination* select either *Automatic* or *Fixed Width*.
 - If *Fixed Width* is chosen, enter the number of pixels.
11. Click *Save* to save the customized iPAC Search Results Display
12. Click *Save* to save the revised Preferences



Note: To restore the display to the default display settings, click *Default*

iPAC Customization via Direct Web Page Modification

L4U Web Server is written entirely in HTML utilizing CSS (Cascading Style Sheets), enabling the user with the appropriate knowledge to modify their web pages. CSS style sheets separate content and design. Historically designers and developers have relied upon extensive markup in each individual web page to style their web pages, meaning both the design elements as well as the content were included in each page. With CSS style sheets the design elements have been taken out of each individual page and placed in one file, the.css file, leaving only the content in each web page.



Warning: Do not attempt any customizing unless familiar with HTML programming and Cascading Style Sheets. L4U Library Software will not support these pages after they have been customized. Also, ensure the modified files are archived to a safe location as the modified files will be replaced when the L4U Web folder is replaced during major upgrades.

Setting Web Privileges

L4U installations that are licensed for L4U Freedom have the added web functionality of patron login and various other features such as customization of search results, circulation on the web, editing patron information and viewing patron profiles. Before any patron has access to these features they must be activated in the Homeroom file. Access settings are controlled in the individual homerooms; therefore, all patrons assigned to the same homeroom will have the same access privileges.

Once the Homeroom Patrons are allowed to log in, a *PIN (password)* for each Patron in the Homeroom should be generated either manually (see “Modifying a Single Patron’s Privileges” on page 31), automatically (see “To assign new PINs to the Patrons in a Homeroom” on page 30) or manually entered in the Patron record if the patron wants to use their own PIN (see “Additional Info” on page 131 of this manual for Web Users). After *Allow All x Clients in this Homeroom to Login* has been checked, any new Patrons added to the Homeroom will have a PIN assigned automatically.

To Enable Web Login

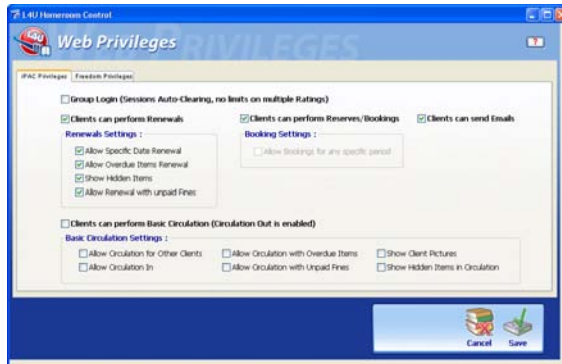
1. *Functions > Homerooms*
2. Double click the Homeroom to modify
3. Click *Login Settings*
4. Select *Allow All x Clients in this Homeroom to Login* (*x* being the number of patrons assigned to this homeroom)
 - This must be enabled to allow even one patron in this homeroom to login
5. If *PIN/Passwords* are not assigned, Click the desired *Type*
6. Check *Send an email to notify clients of the new PIN/Password* if email notification of the change is desired
 - Email settings have to configured before email notifications will work. Please see “Email” on page 52 of the *L4U Users Manual* for more information.
7. Click *Generate Now* to automatically generate passwords
 - *Delete iPAC Sessions* will delete all sessions in this Homeroom. This is useful to delete all the bookbags in the homeroom or to purge the L4U cache for this Homeroom.
8. Click *Save* to exit *Login Settings*, otherwise *Cancel* to discard any changes
9. Click *Save* to exit Homeroom Management



Note: *Auto Login* is described in more detail in “Active Directory Integration” on page 23 in the *L4U Users Manual*.

To Enable Web Privileges

1. *Functions > Homerooms*
2. Double click the Home-room to modify
3. Click *Web Privileges*
4. Select the specific *Web Privileges* you wish these patrons to have. These options are explained below



Group Login

Enable this feature to allow simultaneous Group or Generic Logins. This allows each login to have it's own session and allows for unique bookbags and multiple book ratings. If Group Login is Enabled, then one patron can put multiple ratings on one item as long as this patron is doing it from multiple sessions. If Group Login is Disabled, then one patron can put only one rating on one item. Please refer to “Group Patrons/Logins” on page 14 in the *Enterprise Administrator Manual* for more information.

Renewal/Reserve Options

Enable this option to allow the patron to renew their materials.

- *Allow Specific Date Renewal* - Allows patrons to assign the due date for circulated materials. If not selected, the due date will be based on the Loan Type specifics of the material.
- *Allow Overdue Items Renewal* - Allows patrons assigned to this homeroom to renew their items even if they have overdue items. If not selected, renewals for patrons with overdues will be prohibited.
- *Show Hidden Items* - Materials that belong to Hidden Departments will show up in Items Out. The list could be quite extensive if tracking Textbooks, which are usually hidden from patron searches.
- *Allow Renewal with unpaid Fines* - Allows patrons assigned to this homeroom to renew their items even if they have outstanding fines. If not selected, circulation to patrons with fines will be prohibited.
- *Allow Bookings for any specific period* - Allows patrons assigned to this homeroom to book materials for any length of time. If not selected, the reserve or booking period will be the circulation time associated with that item.
- *Clients can send Emails* - Click to allow patrons to email the bookbag contents.

Basic Circulation Options

All settings apply to their own circulation unless *Allow Circulation for Other Clients* is selected. These options have no effect on Freedom Circulation.

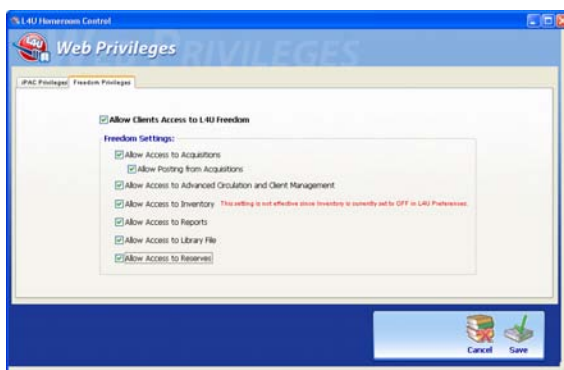
- *Clients can perform Basic Circulation (Circulation Out is enabled)* - Enabling this option allows patrons assigned to this homeroom to circulate items Out to themselves. You can expand on the patrons capabilities by activating the following options.
- *Allow Circulation for Other Clients* - Enabling this option allows patrons assigned to this homeroom to circulate items out to any patron.
- *Allow Circulation In* - Allows patrons assigned to this homeroom to check items in.
- *Allow Circulation with Overdue Items* - Allows patrons assigned to this homeroom to circulate items out to either themselves or all patrons (depending upon the options selected) that have overdue items. If not selected, circulation to patrons with overdues will be prohibited.
- *Allow Circulation with Unpaid Fines* - Allows patrons assigned to this homeroom to circulate items out to either themselves or all patrons (depending upon the options selected) that have outstanding fines. If not selected, circulation to patrons with fines will be prohibited.
- *Show Client Pictures* - If performing circulation while logged on as a patron within this homeroom, patron pictures (either their own or other patrons' depending upon the options selected) will display.
- *Show Hidden Items in Circulation* - All items out, regardless of their department status, will display in items out for each patron.



Warning: Do **not** select *Advanced Circulation* under *Freedom Privileges* if limited Circulation is required. Selecting *Advanced Circulation* overrides the *Basic Circulation* settings and allows the Homeroom full circulation privileges.

To Enable Freedom Privileges

1. *Functions > Homerooms*
2. Double click the Homeroom to modify
3. Click *Web Privileges*
4. Click *Freedom Privileges*
5. Click *Allow Clients Access to L4U Freedom*
6. Select the specific *Freedom Privileges* you wish these patrons to have.
 - Select *Allow Access to Advanced Circulation* if you wish the patrons to have access to full circulation functionality.



- Click *Save* to save the *Freedom Privileges* settings

To assign new PINs to the Patrons in a Homeroom

PINs are automatically assigned when new Patrons are entered. You can override the automatically generated PIN when you enter the new Patron or you can generate new PINs for all patrons in a Homeroom:

- Functions > Homerooms*
- Double click the Homeroom to modify
- Click *Login Settings*
- From the drop down list, select the *Length of PIN* to use
- Select the *Type* of PIN you wish to assign
- If all patron records contain a valid email address, check *Send an email to notify clients of the new PIN/Password*
- Click *Generate Now*
- If any of the patrons already have PINs assigned, a confirmation screen appears. Click *Overwrite PINs* or *Skip these clients*
- A confirmation appears, click *OK*
- An alert appears confirming the number of PINs assigned. Click *OK*
- Click *Save*
- Click *Save* to save the Homeroom

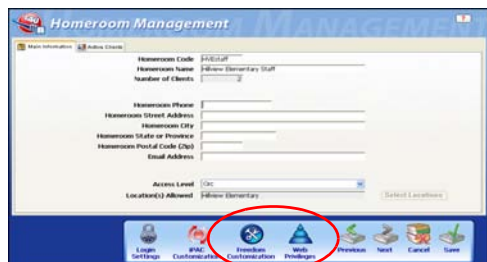


Note: If you are not satisfied with the automatically generated PIN/Passwords or you want your patrons to choose their own, you can modify the patron records individually. However, Web access must be enabled in homerooms.

Creating a Customized Search Results Display for a Homeroom

If licensed for L4U Freedom, you can customize the search results display for individual homerooms, allowing you to present different levels of detail for different groups of patrons. This version of the List View will be displayed to the patron after they have logged in and will override the global iPAC Search Results display setting in Preferences. This is true for any Freedom Customization changes made in the homeroom. The version of the List View for the Library File or Reserves will be displayed to the patron when they view the respective Freedom pages and will override the settings in Preferences. To customize the Search Results display for a specific homeroom:

- Functions > Homerooms*
- Double click the Homeroom to modify
- Click *iPAC Customization* or *Freedom Customization* as required.
- Make the required changes to the Search Results Display



- These options are described in “Search Results Display Customization” on page 23 of this chapter.
5. Click *Save* to return to Homeroom Management
 6. Click *Save* to save your changes



Warning: You must click *Save* on the Homeroom Management screen in order to save the changes you made to *Web Customization*.

Modifying a Single Patron's Privileges

You may find that you wish to remove a patron's login access or perhaps only allow access to a few patrons within a single homeroom. In order for even one patron within a specific homeroom to have access to login, the homeroom must have the Web Login enabled, see “To Enable Web Login” on page 27. It is not possible to enable only certain privileges for certain patrons within the same homeroom. If you want only a few patrons within a homeroom to have login capability, enable Freedom privileges but delete the PINs for the individual patron records. Once the homeroom has been set up, you can modify the patrons who do not have login privileges. To modify a single patron's Freedom privileges:

The screenshot shows the 'L4U Client File Control' window with the 'Client Management' tab selected. The form displays client information for 'Crystal Wall' (Client Code: C0005, Homeroom: Staff). The 'Additional Info' tab is active, showing fields for 'PIN' (1234), 'Gender' (N/A), 'Alternate Phone', 'E-mail address', 'Message', 'Parent's Name', 'Mother's Name', 'Father's Name', 'Guardian's Name', 'Drivers License #', 'Server address', 'Entry Date', 'Mother's Phone', 'Father's Phone', and 'Guardian's Phone'. The 'PIN' field is circled in red. At the bottom, there are four buttons: 'Previous', 'Next', 'Cancel', and 'Save'.

1. *Functions > Clients*
2. Locate and Double click the patron to modify
3. Click the *Additional Info* tab
4. Make the required change in the *PIN* field
 - Delete existing *PIN* to stop access to Freedom login
 - Enter the requested or preferred *PIN* to allow access to Freedom login
5. Click *Save*

Freedom Customization

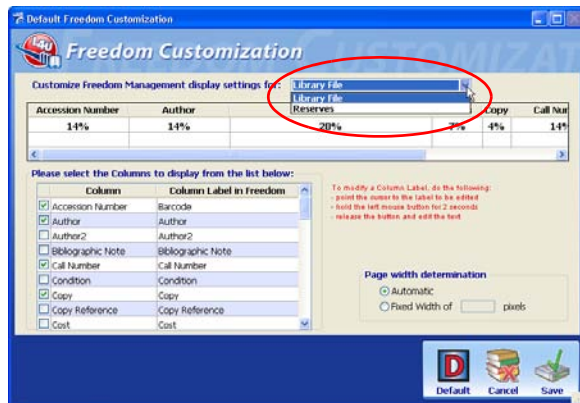
L4U gives you the ability to easily customize how the information is displayed in Freedom. You can create a customized display to use as a default for your library in

Preferences. This defines the look of Freedom and search results in List View as displayed to Freedom users. You can customize the display for individual Homerooms, see “Creating a Customized Search Results Display for a Homeroom” on page 30. Patrons in a homeroom will see the customization as configured in Preferences if their Homeroom’s Customization hasn’t been defined. In other words, they will see the display as specified in Preferences. Once patrons log in, the Freedom customization will be displayed as specified in their Homeroom.



Freedom Customization

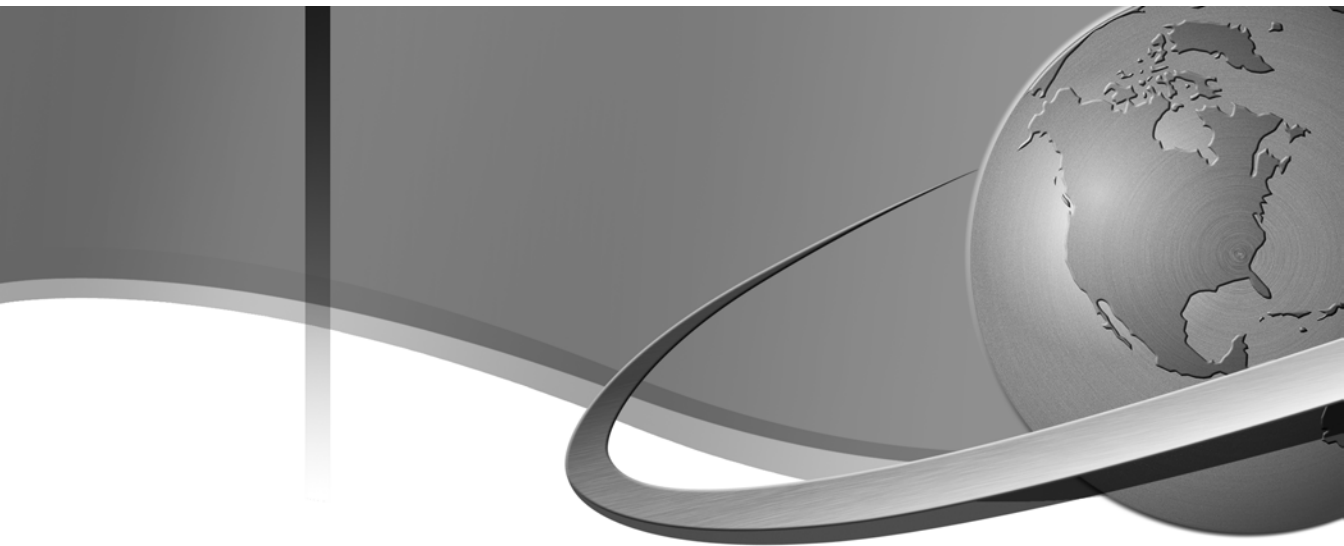
1. *Files > Preferences*
2. Click *Freedom Customization*
3. The *Freedom Customization* screen will appear with a drop-down menu. The options are:
 - *Library File*
 - *Reserves*
4. This allows customization for these Freedom screens
5. After customizing the appropriate Freedom Screen, Click *Save*



Configuring these Freedom options is the same as configuring the iPAC Search Results screens. Please refer to “Search Results Display Customization” on page 23 for more information.



Note: After saving your edits, log out of Freedom and then back in to see your changes.



CHAPTER 2

INTERNET PUBLIC ACCESS CATALOG

- Accessing the Internet Public Access Catalog (iPAC)
- Navigating the iPAC
- Searching Techniques
- Topic Searches
- Viewing search results
- Book Ratings
- Modifying search results display
- Using Federated Searches
- Messages
- New Items
- Web Links
- Working with Bookbags
- iPAC Voting

Accessing the Internet Public Access Catalog (iPAC)

The iPAC (Internet Public Access Catalog) is the interface that patrons use to access the library collection. Patrons can search, view details, sort result lists, print bibliographies and create bookbags. If licensed for L4U Freedom and using *My Profile*, patrons may also place Reserves, Renew & Circulate materials. Please see “L4U On The Web” on page 64 for more information on *My Profile*.

Additional administrative features are available via the *L4U Freedom Profile*. These include cataloging (Acquisitions), Advanced (Full) Circulation, Client Management, Inventory, Specific Reports and Labels. This allows libraries to use any internet browser equipped computer as another administration station. Please see “Freedom Profile” on page 67 for more information on *My Freedom Profile*.

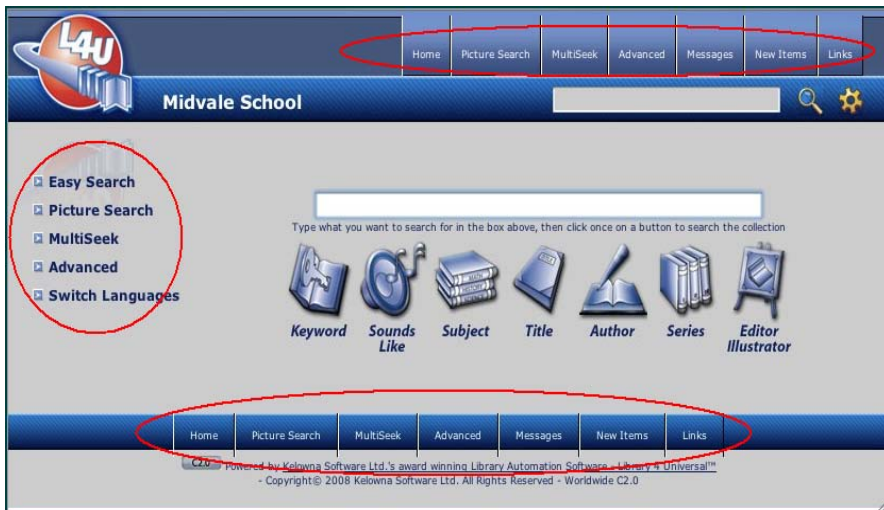
These extra features are enabled and controlled through Web Privileges set in Home-rooms. More information can be found in “Setting Web Privileges” on page 27.

Accessing iPAC

For more information on how to access the iPAC, please refer to “iPAC Connection Types” on page 3.

Navigating the iPAC

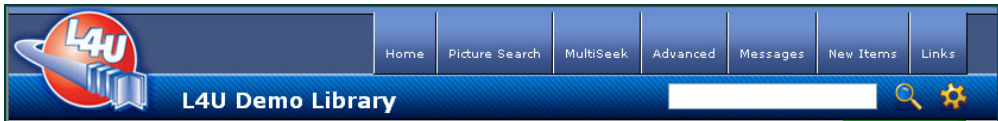
The iPAC has the identical appearance whether it is the internal iPAC or on a web browser. Unless your installation has been customized by your own technicians, the first page that displays for the iPAC is the home page. From the home page you have several options for moving between search types and a number of static links that appear on the toolbar.



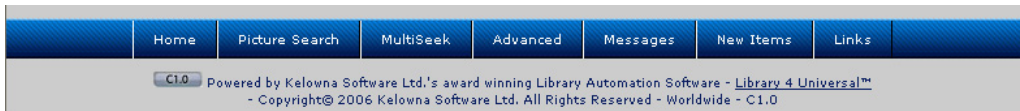
Some links and options may not appear on your screen depending upon your licensing. For Example: Wide Area Searching drop down list, Log In, Location drop down, etc.

iPAC Toolbar

The iPAC toolbar remains consistent throughout all iPAC pages and appears at both the top and bottom of the page. To access the specific search types or links, simply click the preferred option.



Toolbar at top of each page



Toolbar at bottom of each page

Searching Techniques

L4U offers several ways for clients to search the Library collection, ranging from Easy Search or Quicksearch, to a complex multi-level search. Access to the more complex searches can be restricted by employing a modified iPAC skin. The Picture Search, Multiseek and Advanced searches are accessed through the toolbar or from the menu on the left of the homepage. On the standard iPAC skin, either Easy Search or Quicksearch is the default displayed on the homepage. Which search screen displays depends on the iPAC Customization Settings. The default settings are configured in Preferences (please refer to “Default Search Screen” on page 20) or can be configured on the fly from within the Internet Browser (please refer to “Viewing Search Results” on page 44).

Easy Search

The Easy Search was introduced for patrons who are not exactly sure of how to phrase a query, but have a good idea of what they are looking for. Easy Search uses search techniques similar to the popular internet search engines. The most popular fields in L4U (e.g. title, author, subtitle, series, etc.) are searched and assigned a weighted value. The resulting list is then sorted on the total weighted value. For more

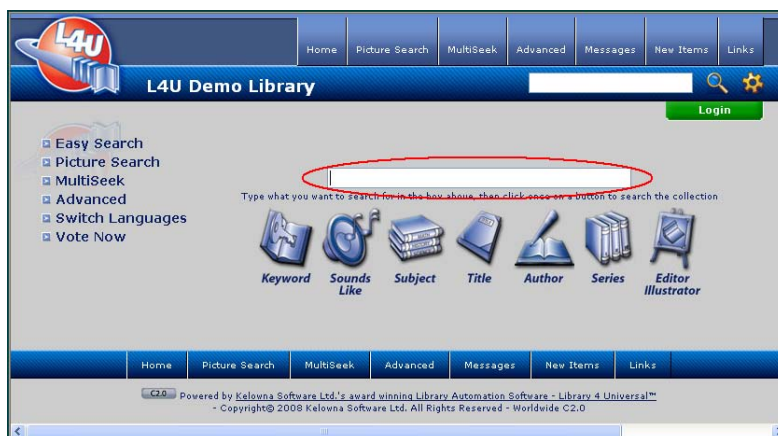
information on how to change the weighting scale, please contact L4U Technical Services. To use Easy Search:



1. On the iPAC homepage, Type in the search criteria in the field provided
 - This can be a single word, multiple words or a phrase
2. Click the magnifying glass icon
 - Pressing ENTER on the keyboard will perform the search as well
3. The iPAC displays a list of items that match the search criteria

Quicksearch

This search is the simplest of all the searches and will likely be the most used by your patrons. The search criteria entered for this type of search can be a single entry, multiple words or a phrase. Exactly how the search is executed will depend upon the search options selected in Preferences, see “Combining Search Terms” on page 14. To use Quicksearch:



1. On the iPAC homepage, Type in the search criteria in the field provided
 - This can be a single word, multiple words or a phrase

2. Click the icon that represents the type of search to perform
 - Pressing ENTER on the keyboard performs a Keyword search
3. The iPAC displays a list of items that match the search criteria



Note: Searches are not case sensitive and do not recognize articles (the, and, a, etc.). Quicksearch & Authority Quicksearches work exclusively with keywords and not all words are keyworded. For more information on excluded keywords, see page 36 in the *L4U Users Manual*.

Keyword

The keyword search is performed by entering the search criteria and either pressing the ENTER key on the keyboard or by clicking the *Keyword* icon. When this option is selected, L4U searches the keywords of each item record looking for a match to the search criteria. Keywords are derived from various fields within the item record. For more information on keywords, see “Keywords” on page 35 in the *L4U Users Manual*. Additionally, L4U applies the search option selected in Preferences when performing a keyword search. There are two search options that effect how the search is conducted. The comparison value between multiple words entered can be set to AND or OR. Selecting OR will return results that contain any of the words entered whereas, selecting AND will return results that contain all of the words entered. To adjust this setting, “Combining Search Terms” on page 14. Using keywords results in a greater hit rate than using a single search category.

SoundsLike

The SoundsLike search is a phonetic search tool. It is especially useful for those hard to spell terms and patrons who experience difficulty with spelling. To use the SoundsLike search, Enter the word as it sounds phonetically and then click *SoundsLike*. For Example: Entering **elifant** will produce those records with a keyword of ‘Elephant’. L4U searches a list of phonetic keywords that has been generated from the item keywords.

Authority Quicksearches

Authorities have their own keywords and these keywords are searched when using the following functions. Authority keywords are created from the respective Authorities and use the same Keyword Exclusion list in Preferences. For more information on excluded keywords, see page 36 in the *L4U Users Manual*.

Subjects

To search for a Subject, Enter the Subject or a portion of the Subject and click *Subject*. For Example: **plan** would produce records with Subjects such as ‘Plants’, ‘Trips--Planning’ or ‘Planets’. Enter a complete term for more exact searching. If multiple search criteria has been entered, L4U will apply the *Authority Keyword Searches* preference setting and look for matching items in the Subjects keywords table.

Title

To search for a Title, Enter the Title, or a portion of the Title excluding all articles (The, An, A, etc.) and then click *Title*. Example: enter **cat** and the results will include items such as 'Cat in the Hat, The', 'To catch a mocking bird' and 'Catcher in the Rye'. Enter a complete term for more exact searching. If multiple search criteria has been entered, L4U will apply the *Authority Keyword Searches* preference setting and look for matching items in the Title keywords table. If an exact match is desired, please use the Advanced search. The Advanced Search doesn't use keywords and looks at the complete title in the Library File.

Author

To search for an Author's name, Enter the search criteria and click *Author*. The name does not have to be entered completely or in direct order. For example: Entering **alex smith** can produce a result of 'Smith, Alexander'. If multiple search criteria has been entered, L4U will apply the *Authority Keyword Searches* preference setting and look for matching items in the Author keywords table.

Series

To search for a Series, Enter the Series or a portion of the Series and click *Series*. For Example: **read** would produce results such as 'Reading rainbow' or 'Step into reading'. Enter a complete term for more exact searching. If multiple search criteria has been entered, L4U will apply the *Authority Keyword Searches* preference setting and look for matching items in the Series keywords table.

Editor Illustrator

The Editor/Illus search applies the same method as the Author search. To search the Editor/Illustrator field, Enter the search criteria and click *Editor Illustrator*.

Topic Search

Topic Searches are predefined searches that are executed by clicking on graphics displayed in the iPAC. Topic Searches are configured by the Librarian and allow quick

access to relevant materials in the collection. Please see for more information on how to setup and configure Topic Searches. To execute a Topic Search:



1. On the iPAC homepage, click *Topic Search*
2. The Topic Search Carousel appears.
 - Click the Curved Arrows to move through the list of topics.
 - Click the Play button to start the Carousel
 - Click the Pause icon to stop the Carousel
3. Click on the appropriate Search icon



- A submenu may appear with more search icons or
- A list of search results is displayed

Picture Search

For L4U Platinum Users

Picture Searches have been replaced by Topic Searches in L4U Platinum Elite. Please refer to “Topic Search” on page 40 on how to use L4U Freedom Topic Searches.

MultiSeek

The Multi Seek option provides the client with the ability to search on multiple topics at one time. Boolean operators combine terms for more streamlined results. To perform a MultiSeek search:

1. On the iPAC homepage, click *MultiSeek* on the toolbar or the menu
2. From the drop down menus on the left, Select the field(s) to search
3. In the field(s) provided, Enter the search criteria
4. From the drop down menus, Select the Boolean search operand
 - *OR* - used to receive search results that contain either of the items before and after the *OR* operand. Example: Selecting ‘cat *OR* dog’ will produce results that contain both cat and dog, as well as only dog or only cat.
 - *AND* - will produce results that contain both items before and after the *AND* operand. Example: Selecting ‘mouse *AND* elephant’ will only produce results that contain both mouse and elephant.
 - *NOT* - will produce results that contain the item(s) before the *NOT* operand but excludes items after the *NOT* operand. Example: selecting ‘cat *NOT* elephant’ will produce results that contain cat, but will exclude items which contain cat as well as elephant.
5. Media and/or Level can be used in conjunction with the MultiSeek search criteria.
 - If Media and/or Level are used, their Boolean search operand is always AND with respect to the other criteria specified.
6. Click *Search*
 - *Reset* will reset the search to default so that a new search can be entered
7. The Results screen will display the number of hits in the Title Bar and list them in the main screen.



Note: Very specific searches yield a much smaller hit rate. To broaden searches, use the *OR* operand.

Advanced Search

The Advanced Search feature searches the fields of an item record directly as opposed to searching the keywords associated with the field. This means that users will have to enter more specific search criteria. This search is conducted in a direct, or left to right, order. For Example: entering **cat** would result in hits such as 'Cats and Dogs' or 'Cat-erpillars' but it will not find 'Arthur catches a train'. This search type also includes the ability to do between searches for finding ranges of items. For Example: items with Deweys from 001 to 010. To use the Advanced search:

1. On the iPAC homepage, click *Advanced* from the toolbar or the menu
2. Select the field to search
3. In the first field provided, Enter the search criteria
 - To search for the criteria exactly as typed, type a '.' after the entry. Example: **cats.**
4. Click *Search*

Between Searching

Between search can be enabled to perform searches for items in a range. This could be items between a certain range of dewey designations or items entered into the collection between specific dates. To perform a between search using Advanced:

1. On the iPAC homepage, click *Advanced*
 - From the toolbar or the menu
2. Select the field to search
3. In the first field provided, Enter the 'from' search criteria
4. Click the *Enable Between Searching* checkbox
5. Enter the 'to' value in the second field
6. Click *Search*



Note: To clear the field selected and the value(s) entered, click *Reset*.

Viewing Search Results

By default the iPAC local collection search results are displayed in Detail view. By default this list includes the Title, Subtitle, Author, Publisher, Call Number, Status, Location, Book Cover and lists each individual item separately. This initial listing of found items can also be displayed as Authorities (Authorities display is available for List, Details & Bibliographic views). To change from Authority or Items display or set a default, see “Authority vs. Item Display” on page 11.



Items Display (Details View)



Authority Display



Note: If L4U is set to *Item* display and you have performed a Quicksearch on one of the Authorities (Title, Author, Subject, Series, Editor Illustrator), you can switch to the Authority view by clicking the link at the bottom of the page. In the case of a Subject search the link will read, *Display by Subject*.

The Authority display is a table containing only a list of hits and the number of items associated to each. For Example: a Title search would result in a list of Titles only and the number of items containing the search term in that Title. To view the individual items, you must click the Title link.

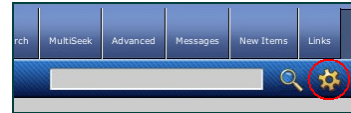
More tabs will appear at the top of the results list if licensed for Federated Searching and the Service Providers login credentials have been configured in Preferences. Please refer to “Federated Searches” on page 52 for more information on how to use Federated Search.

Regardless of the view chosen, the total results are listed at the top of the table and the records are displayed 15 per page. To view the next 15 records, simply Click Next 15 Hits or the preceding records, Click Previous 15 Hits.

Search Results Options

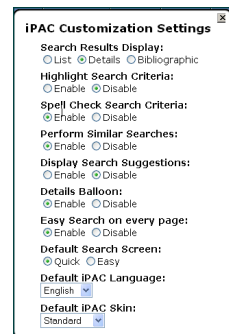
Search results can be further refined with the following options. These options can be set in Preferences to be the default when a new internet browser window is opened or modified on the fly in the current internet browser window (current session). The current session settings override the settings defined in Preferences. To modify the Current Session *iPAC Customization Settings*:

1. From any iPAC page, *hover* the mouse pointer over the cog icon
2. Select the desired option



OR

1. From any iPAC page, *click* the cog icon
2. Select the desired options
3. Click *Apply*



The settings are then applied to the current session. If the window is closed, these options will be lost and any new internet browser sessions will use the settings in Preferences.

Default Results Display

List

This view is similar to the list of materials as presented in the Library File and other files in L4U. This view presents the most items on the screen with the minimum amount of space.

<input type="checkbox"/>	Astronomy for every kid 101 easy experiments that really work /	VanCleave, Janice Pratt.	In	520 VAN	Local Library
<input type="checkbox"/>	How the universe works	Couper, Heather.	In	520 COU	Local Library
<input type="checkbox"/>	Janice VanCleave's astronomy for every kid 101 easy experiments that really work /	VanCleave, Janice Pratt.	In	520 VAN	Local Library

Details

Detail display shows the patron the individual library items in more detail than the List results.

<input type="checkbox"/>	Astronomy for every kid 101 easy experiments that really work / by VanCleave, Janice Pratt. John Wiley & Sons, Series: Wiley science edition Call No.: 520 VAN Status: In Location: Local Library
<input type="checkbox"/>	How the universe works by Couper, Heather Reader's Digest Association, Call No.: 520 COU Status: In Location: Local Library

Bibliographic

The results list is similar to the Details view but in bibliographic format.

<input type="checkbox"/>	VanCleave, Janice Pratt. Astronomy for every kid New York : John Wiley & Sons, 1991. 520 VAN Location: Local Library
<input type="checkbox"/>	Couper, Heather. How the universe works Pleasantville, N.Y. : Reader's Digest Association, 1994. 520 COU Location: Local Library
<input type="checkbox"/>	VanCleave, Janice Pratt. Janice VanCleave's astronomy for every kid New York : Wiley, c1991. 520 VAN Location: Local Library

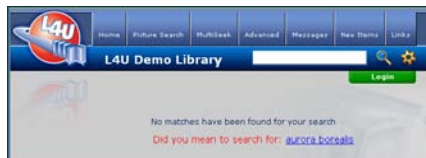
Highlight Search Criteria

This option will highlight the search terms in the resulting lists. This allows patrons to quickly locate the relevant items on screen.

<input type="checkbox"/>	41.88	Jesse James last rebel of the Civil War /	Stiles, T. J.	In	021.3am	Local Library
<input type="checkbox"/>	35.57	Jesse Jackson civil rights activist	Haskins, James	In	073.927 D92 JAC H43	Local Library
<input type="checkbox"/>	16.73	James Bond the secret world of 007 /	Dougal, Alastair	In	791.43 D6U	Local Library

Spell Check Search Criteria

When performing a single field search (i.e.: not Multiseek), L4U will check the spelling of the search terms and suggest alternative forms of the misspelled words from the collection's keywords. For example, a keyword search of *arora borealis* will result in L4U suggesting *aurora borealis*.



Perform Similar Searches

If enabled, author searches will display other authors based on the subjects in the list of results. For example, a search for the author Anna Sewell, will list these authors because of the subjects associated with Anna Sewell's found materials.



Display Search Suggestions

L4U will list different combinations of the search terms and the number of items found using those combinations. For example, a keyword search of civil war videos is too specific and returns no hits. L4U will suggest alternative search terms with the number of items associated with that search term.



Details Balloons

L4U will present a pop up balloon which contains the item's bibliographic information when the cursor hovers over the title of the item. To dismiss the balloon, either click the close box or click on another item's title.



Easy Search on Every Page

The Easy Search button can be displayed on every page of the iPAC.

Default Search Screen

Easy Search will present the iPAC user with one search field to search the collection. This may be the best solution for younger patrons. Quick Search offers more search options for the patron. Please see “Searching Techniques” on page 37.

Default iPAC Languages

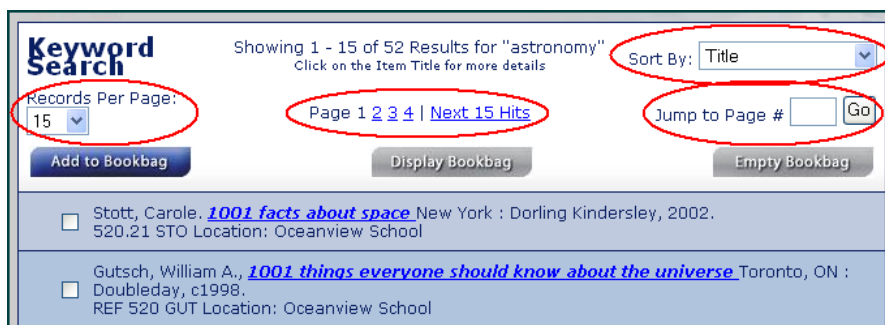
L4U can display the iPAC screens in one of three Languages; English, French or Spanish. The Language selected will affect the buttons and alert messages that appear when clients use the iPAC functions. This setting does not convert the data within your collection, only the interface that displays your materials. The Language selection will only apply to the iPAC, and will not affect any other levels of L4U. Both the default language display and the language used for a specific session can be modified.

Default iPAC Skin

The appearance of the L4U iPAC can be changed by simply selecting a different skin. A skin will change the look of the dialog boxes, buttons, etc. of the iPAC interface. The different skins available are selectable from the drop list.

Navigating the Results List

Standard internet browser window controls are available when the display is set to Item Display. *Sort by*, *Records per Page* and *Go To* a desired page allow patrons to quickly navigate the results list.



Sorting Search Results

While in the Item or Authority list views, it is possible to sort the search results. This is achieved by clicking the column label by which you wish to order the records.

Clicking the column label once will sort the records in ascending order. If you click the same label again, the records will be listed in descending

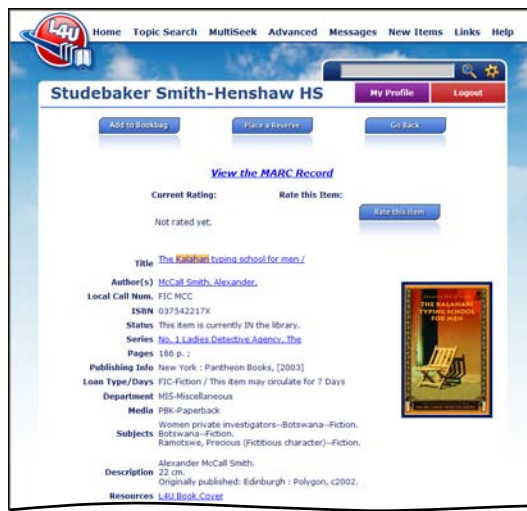
order. If you reorder a list while viewing any page other than the first results page, you will be returned to the first page with the new sort order displayed.



Viewing Item Detail

Once you have performed a search and have a list of results, you may wish to view the records in more detail. This is done by clicking the Title link of the item you wish to view. When using the Authority view, you will need to display the individual records by clicking the link in the authority list prior to selecting an individual record.

The item detail display contains all the information specific to the item chosen. This can include: Title, Subtitle, Author, Local Call Number, Status, Pages, Publishing information, Circulation (Loan period) information, Department, Media, Subjects and Description. Any data entered in the library file record will be displayed in the iPAC item detail. If a book cover has been saved to this item record, it will display as well.

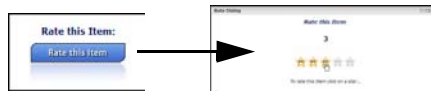


Note: While viewing the details of a specific record you can return to the search results list by clicking *Go Back*.

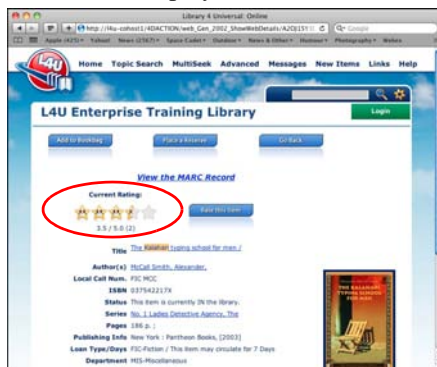
Book Ratings

L4U allows for patron ratings of books and other library materials. It is based on a five star system, with one being low and five being the highest rating. L4U will average the rating based on the number of ratings received. The patron has to login to the iPAC to rate materials. Also, the Library Administrator has to enable Show Item Ratings in Preferences. To rate an item:

1. Locate the item to be rated using one of the Search options
2. Open the item
3. Click *Rate this Item*
4. Click on the desired rating



5. The Item Detail screen is displayed with the current averaged rating.



Note: Only one rating is allowed per patron unless Group Login is enabled for the logged in patron's Homeroom. Please refer to "Group Login" on page 28.

Social Network Links

If enabled by the librarian, social networking links are available so library patrons can like and share their favorite books with friends via Facebook, Twitter, My Space and other popular sites. School district policies may block access to some of the sites or features.



Related Searches

When viewing the item details for an individual record, a related search can be conducted by clicking any field data that appears as a link. These fields will most often be Title, Author, Series, Ed/Illus and/or Subjects. By clicking one of these links a page

will display showing that search criteria and the number of records that contain the selected information. Clicking in this list will display the individual records.

Studebaker Smith-Henshaw HS [My Profile](#) [Logout](#)

[Add to Bookbag](#) [Place a Reserve](#) [Go Back](#)

[View the MARC Record](#)

Title: Death from the skies!
these are the ways the world will end-- /

Author(s): Plait, Philip C.

Local Call Num. ERES 520 PLA
ISBN 9780670019977
0670019976

Status This item is currently IN the library.

Pages 326 p. :

Publishing Info New York : Viking Penguin, 2008.

Loan Type/Days ERES-Electronic Resources / This item may circulate for 14 Days

Department MIS-Miscellaneous

Media EPUB-ePub Format

Subjects: Astronomy.
End of the world (Astronomy)

Description Philip Plait.
ill. :
22 cm.
Includes index.
Target Earth -- Sunburn -- The stellar fury of supernovae -- Cosmic blowtorches -- The bottomless pits of black holes -- Alien attack! -- The death of the sun -- Bright lights, big galaxy -- The end of everything.
It's only a matter of time before a cosmic disaster spells the end of the Earth. But how concerned should we be about any of these catastrophic scenarios? And if they do post a danger, can anything be done to stop them?

Resources

[L4U Book Cover](#)
[Bad Astronomy Web Site](#)
[Overview of ePub Version](#)

Current Rating:
Not rated yet.
[Rate this Item](#)

View MARC Record

Within the item detail view is a *View MARC Record* link. This link is used to view the MARC tagged display of the chosen record. This option is useful for using alternate L4U collections as a cataloging source. The process is similar to the Internet download described in “Import Tab” on page 103 in the *L4U Users Manual*, with the exception that your MARC record source is an L4U iPAC as opposed to the Library of Congress. To view the MARC record in tagged display, simply click the *View MARC Record* link in the item detail view of the chosen record.

Resources

If additional resources have been identified in the item’s record, they will be displayed as links opposite the heading Resources. Additional resources may be pictures, music or other types of files and links to other internet pages. To access the resource, click on the link.

eBooks Common Area

L4U Enterprise allows the District Librarian to create a Common Area for the repository of eBooks. All materials assigned to this Common Area will appear in all iPAC searches regardless of their current loca-



tion and show up in iPAC search results with a special icon. Physical and electronic resources are easily integrated in the same collection.

Federated Searches

Federated Searches can be best described as a simultaneous search of the local collection(s) and a remote database(s). Search results are then displayed in the iPAC as separate tabs. The L4U iPAC can perform Federated Searches if licensed for L4U Freedom. Searching remote databases is available if your site is licensed to search these content providers. The individual Content Providers login credentials have to be configured in Preferences before the Federated Searches will work. Please refer to “Federated Search” on page 17 for more information on Configuring Federated Searches.

Please refer to the Content Provider’s documentation or their online help for more information on their sites features.

The image displays three overlapping screenshots of the L4U Training Library web interface, illustrating the results of a federated search for the term "scopes trial".

Top Screenshot: Shows the search results page with the search term "scopes trial" entered. The results are displayed in tabs: "Local Library Results - 12", "Britannica Results - 11", and "EBSCO Results - 33". The "Easy Search" section indicates "Showing 1 - 12 of 12 Results for 'scopes trial'" and provides a link to "Click on the Item Title for more details".

Middle Screenshot: Shows the search results page with the search term "scopes trial" entered. The results are displayed in tabs: "Local Library Results - 12", "Britannica Results - 11", and "EBSCO Results - 33". The "Easy Search" section indicates "Showing 11 of 11 Search Results for 'scopes trial' at school.eb.com" and provides a link to "Go Directly to Britannica Interface for Search Results" or "Click on the Item Title for more details".

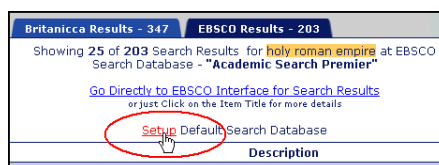
Bottom Screenshot: Shows the search results page with the search term "scopes trial" entered. The results are displayed in tabs: "Local Library Results - 12", "Britannica Results - 11", and "EBSCO Results - 33". The "Easy Search" section indicates "Showing 25 of 33 Search Results for 'scopes trial' at EBSCO Search Database - 'Library, Information Science & Technology Abstracts'" and provides a link to "Go Directly to EBSCO Interface for Search Results" or "Click on the Item Title for more details". Below the search results, there is a table with the following data:

Title	Description
Monkey Town: The Summer of the Scopes Trial.	The article reviews the book "Monkey Town: The Summer of the scopes trial ," by Ronald Kidd.
Ringside, 1925: Views from the Scopes Trial.	The article reviews the book "Ringside, 1925: Views from the scopes trial ," by Jen Bryant.
Monkey Town: The Summer of the Scopes Trial.	The article reviews the book "Monkey Town: The Summer of the scopes trial ," by Ronald Kidd.
Ringside, 1925: Views from the Scopes Trial.	The article reviews the book "Ringside 1925: Views from the scopes trial ," by Jen Bryant.
Monkey Town: The	

Copyright 2009 L4U Education Systems All Rights Reserved - Worldwide 0213

To use Federated Searching

1. *Login* to iPAC, see page 64
2. Perform a *Quick Search* (keyword) or an *Easy Search*, see page 37
 - Federated Search only works with these search methods
3. In addition to the search results from the local collection(s), tabs will allow browsing of the content as provided by the other sites
 - Only the first 25 hits are listed in the iPAC results based on their relevance as determined by the Content Provider
4. Click on the *Title* or Click the *Go Directly to Search Provider Interface for Search Results* link for more information on the item
 - The Search Providers web page will open in a separate window and may require a secondary username/password to proceed
5. If the search provider allows searching of specific databases, make the desired choice from the Select Database drop down



Messages

Library patrons can access a message area from any page of the iPAC. To view messages:

1. On any iPAC page, click *Messages* on either the top or bottom toolbar
2. Select a Message Category.
 - Only categories that have messages will appear as a link.
3. The message will appear.
4. To exit the message screen, either click the browser *Back* button or *Home* on the toolbar

Topic
Library Hours*
Lunch Specials*
Coming Events*
Exam Schedule*
Student Council*
Field Trips*
Fund Raisers*

New Items



The iPAC contains a *New Items* link that can be used to display a list of items recently added to the collection. The number of days an item stays 'new' is determined by a Preference setting (see "New Items Search Options" on page 12) and the Entry/Issue field within each record. To access New Items:

1. On any iPAC page, click *New Items* on either the top or bottom toolbar
2. A page appears listing all items that are classified as new
3. To exit New Items, click *Home*

Web Links

The library administrator has the ability to add customized Web Links to the iPAC. Any patron connecting to the library via the internet will also be provided with direct links to other web sites (as set up by the Library Administrator). These Web Links can be added to and revised as necessary. Web Links are maintained in the Library Profile. To add a Web Link to the Web Page, see “Creating Web Links” on page 17.

Viewing Web Links

Web Links are an excellent tool for directing patrons to areas of interest on the Internet. If a school or school district web page has been established, this is where a link can be set up. To view existing Web Links:

1. On the iPAC home page, click *Links* on either the top or bottom toolbar
2. To access a listed site, click the Link
3. To exit web links, click *Home*

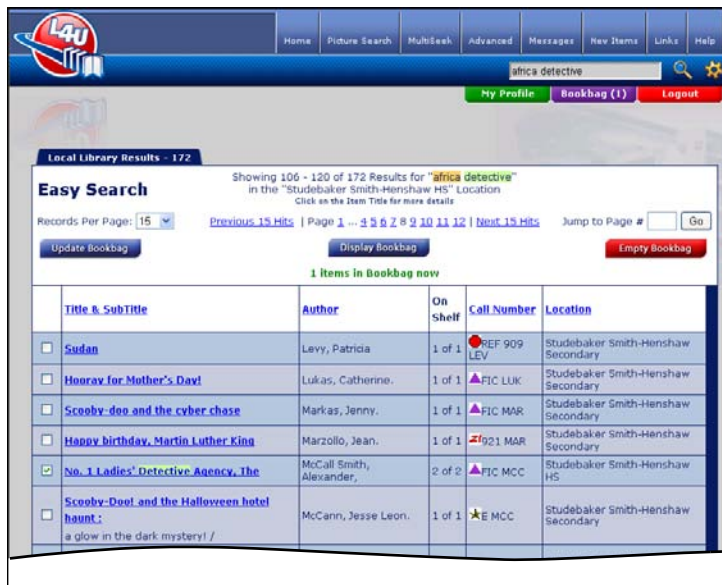
The screenshot displays the L4U Demo Library web interface. At the top, there is a navigation bar with buttons for Home, Picture Search, MultiSeek, Advanced, Messages, New Items, and Links. Below this is a search bar and a Login button. The main content area is titled "Links" and contains a table with two columns: Site Name and Description. The table lists four links: The L4U Product Web Site, The Apple Web Site, The Microsoft Web Site, and Wikipedia Encyclopedia Web Site. At the bottom, there is a footer with copyright information and a note about the software being powered by Kelowna Software Ltd.'s award-winning Library Automation Software - Library 4 Universal™.

Site Name	Description
The L4U Product Web Site	The source for L4U Product Information
The Apple Web Site	The Official Apple Computers web site. Find out about all things Apple here!
The Microsoft Web Site	The Official Microsoft Web Site. Find out about all things Microsoft here!
Wikipedia Encyclopedia Web Site	A useful site for reference to all types of material. You can look up just about everything. If you can not find it there, you can even write your own article and post it for others to use! Very innovative.

© 2008 Powered by Kelowna Software Ltd.'s award winning Library Automation Software - Library 4 Universal™
- Copyright© 2008 Kelowna Software Ltd. All Rights Reserved - Worldwide C1.5

Working with Bookbags

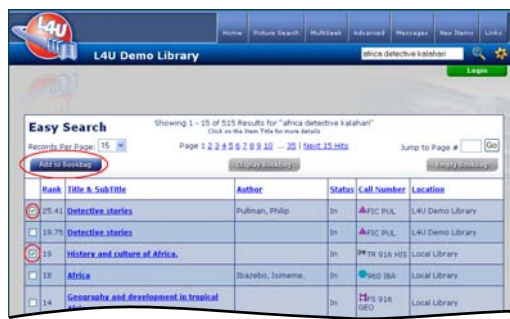
The L4U iPAC includes a Bookbag feature. The Bookbag is used to group items of interest that are not necessarily accessed from the same search and then display all selected items as one list. Bookbags are local to the browser therefore, individuals on separate computers can be working with their own bookbags simultaneously.



Adding Items to the Bookbag

Multiple items can be added to the Bookbag throughout an iPAC session. The items are saved in the Bookbag until they are cleared or a new iPAC session is started. To add items to the Bookbag:

1. While in the iPAC, Conduct a search
2. From the results list, Select items of interest by clicking the check box to the left of the record.
3. Click *Add to Bookbag*



- If items already exist in the Bookbag this button will read *Update Bookbag*

4. A count of items in the Bookbag will appear on screen and under the task bar



Note: The Bookbag link will only appear under the task bar if it is currently in use. Once a bookbag is emptied, the link will no longer appear.

L4U Demo Library

Home Picture Search MultiSeek Advanced Messages New Items Links

Bookbag (2) Login

Easy Search

Showing 1 - 25 of 515 Results for "africa detective kalahari"
Click on the item title for more details

Records Per Page: 15 Page 1 2 3 4 5 6 7 8 9 10 ... 25 | Next 15 Hits

Update Bookbag Display Bookbag Empty Bookbag

Rank	Title & SubTitle	Author	Status	Call Number	Location
25.41	Detective stories	Pullman, Philip	In	AFIC PUL	L4U Demo Library
19.75	Detective stories		In	AFIC PUL	L4U Demo Library
19	History and culture of Africa		In	IM YR 916 HIS	Local Library
10	Africa	Ibazebo, Isimeme	In	960 IBA	Local Library

Adding to the Bookbag from Item Details

Adding multiple items to a bookbag from the list view is quick and easy; however, you may also wish to view the details of an item before adding it to the bookbag. You can add an item to the bookbag while viewing the chosen record's details. Simply view the record detail and click the *Add to Bookbag* button. The button changes to red and reads *Remove from Bookbag*. To remove from the Bookbag, click the *Remove from Bookbag* button.

L4U Demo Library

Home Picture Search MultiSeek Advanced Messages New Items Links

Bookbag (2) Login

Add to Bookbag Place a Reserve Go Back

[View the MARC Record](#)

Title [The No. 1 Ladies' Detective Agency](#)

Author(s) [McCall Smith, Alexander](#)

Local Call Num. FIC MCC

ISBN 1400034779 (pbk.)

Status This item is currently IN the library.

Series [No. 1 Ladies' Detective Agency, The](#)

Pages 235 p. ;

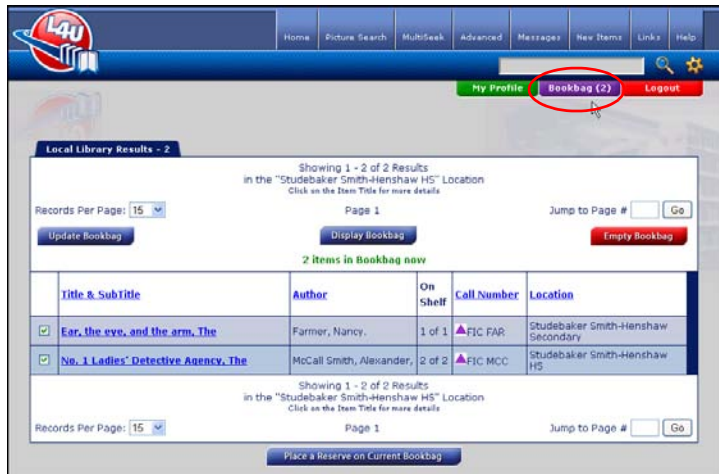
Publishing Info New York : Anchor Books, 2002.

Loan Type/Days FIC-Fiction / This item may circulate for 7 Days

Department MIS-Miscellaneous

Viewing Items in the Bookbag

The Bookbag contents can be viewed at any time. Display the Bookbag by clicking either the *Display Bookbag* button available from the search results screen or the *Bookbag* link under the toolbar from any screen.



Deleting Items from the Bookbag

Individual items can be removed from a Bookbag without clearing its entire contents. To remove an item from the Bookbag:

1. Click *Display Bookbag* or the *Bookbag* link
2. Deselect the check box of the item to be removed
3. Click *Update Bookbag*

Removing an Item from Detail View

A single item or multiple items can be removed from a bookbag while in the bookbag view. You may wish to review the items one by one before deleting them from the bookbag.

To review an item and then remove it:

1. Click *Display Bookbag* or the *Bookbag* link
2. Click the title link of the record to review
3. In the detail view, click *Remove from Bookbag*
4. Click *Go Back*
 - You are returned to the next Items Detail view

Emptying the Bookbag

Once you are finished with a Bookbag, it can be deleted from the iPAC station. To remove an entire Bookbag, simply click the *Empty Bookbag* button (displayed in the search results screen). If the *Empty Bookbag* button is not available, first click the

Bookbag link under the task bar to display the Bookbag contents and then click *Empty Bookbag*.



iPAC Voting

All voting in L4U takes place in the iPAC. Elections are set up and monitored from the Administration area of the program; however, individuals cast a vote from the iPAC stations. When there are active elections taking place, a *Vote Now* link appears on the home page.



Casting a Vote

Voting takes place on the web client (iPAC). Depending on whether it is a free or restricted vote, all or only specific clients will be able to cast a vote.

To cast a vote:

1. On the iPAC Home page, click *Vote Now*
2. From the drop down list, Select the desired choice
 - If more than one election is active, each election will display on a separate line with a drop down list of candidates
3. Click *Vote!*
 - A confirmation screen appears. If the results are set to display *During the Election*, a to-date tally of votes will be listed

Election Title:	#	Name	Votes	Percent
School President Held from 1/19/2006 to 1/19/2010 Total votes cast: 109	1	Maniah Stablo - Elementary Class Student	32	29.35%
	2	Carl Wood - Elementary Class Student	24	22.01%
	3	Suzie Queue - Senior Class Student	23	21.10%
	4	Fran Star - Senior Class Student	19	17.43%
	5	Max Story - Kindergarten Class Student	11	10.09%

4. If the vote is restricted, registration is required. Enter the client code and password (PIN)
5. Click *Login*
 - A confirmation screen appears. If the results are set to display *During the Election*, a to-date tally of votes will be listed.
6. To continue with searching, click *Home*



Note: If concurrent elections are both free and restricted votes, each election will have a separate Vote button. However, if all elections are either free or restricted, the patron can make a selection for all elections and click vote once.



Election Results

Once all votes have been cast and the election is complete, the results can be viewed and printed from the iPAC screen by clicking the *Election Results* link on the home page.



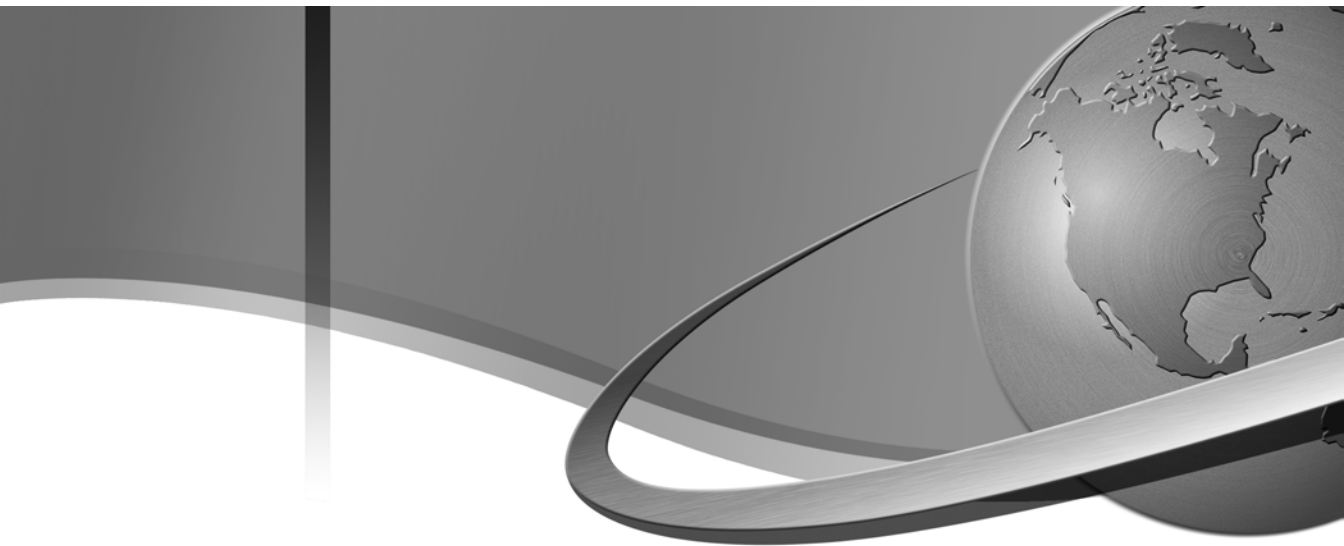
The election results can also be printed from an administration station with access to Preferences. The report is generated from the *Election Management* screen.

1. *File > Preferences*
2. Click *L4U iPAC*
3. On the *Configuration & Startup* tab, click *Update Voting*
4. Highlight the election to report
5. Click *Subset*
6. Click *Print*
7. On the Reports tab, click Custom
8. Use the Report Editor to create a report with the required information
 - See “Custom Report Editor” on page 233 in the *L4U Users Manual* for more information on using the Report Editor

The screenshot shows the L4U Demo Library website. At the top is a navigation bar with links: Home, Picture Search, MultiSeek, Advanced, Messages, New Items, and Links. Below this is a 'Login' button. The main content area is titled 'School President' and displays 'Finished Elections Results:'. A table shows the election results for the 'School President' election, held from 1/19/2006 to 1/4/2008, with a total of 110 votes cast.

Election Title:	#	Name	Votes	Percent
School President Held from 1/19/2006 to 1/4/2008 Total votes cast: 110	1	Suzie Queue - Senior Class Student	24	21.81%
	2	Fran Star - Senior Class Student	19	17.27%
	3	Mariah Stabb - Elementary Class Student	32	29.09%
	4	Max Story - Kindergarten Class Student	11	10.00%
	5	Carl Wood - Elementary Class Student	24	21.81%

At the bottom of the page is a footer with the text: 'Powered by Kessel Software Ltd. is award winning Library Automation Software - Library 4 Universities. Copyright © 2007 Kessel Software Ltd. All Rights Reserved - Worldwide C.L.B.'



CHAPTER 3

WEB ADMINISTRATION

- iPAC and Freedom Login to L4U on the Web
- My Profile and Freedom Profile
- My Items Out & Renewals
- Reserves
- Sending Bookbags by Email
- My History
- Basic or Limited Circulation
- Circulation Period Hierarchy
- Log out of L4U on the Web
- Quit iPAC

L4U On The Web

Everything discussed in the iPAC chapter is available to all L4U Freedom licensed users. After a patron logs in and using *My Profile*, they may place reserves, renew & circulate materials. Additional administrative features include Freedom Circulation, Client Management, Inventory, Online Reports, EZ Labels and Online Cataloging via *My Freedom Profile*. This allows libraries to use any internet browser equipped computer as another administration station. These extra features are enabled and controlled through Web Privileges set in Homerooms which is covered in more detail in “Setting Web Privileges” on page 27.

iPAC Login

If licensed for L4U Freedom, patrons must login to the iPAC in order to access *My Profile* or *My Freedom Profile*. Login is accomplished by entering a patron code and PIN/Password. Authorized patrons can have access to their circulation histories, reserves, renewals or other information depending on privileges assigned by the Library Administrator. Please see “Setting Web Privileges” on page 27 for more information on assigning Web Privileges. To login to *My Profile*:

1. From the *iPAC* home page, click *Login* under the toolbar
2. Do one of the following
 - Enter your *Client Code*
 - Enter your last name
3. Enter your PIN/Password
 - The PIN/Password is not case sensitive
4. Click *Login*



Note: Your Windows login credentials may also be used if Active Directory Login is enabled. This is usually administered by the L4U Application Specialist or District Librarian. For more information, please see “iPAC Login using Active Directory” on page 24 in the *L4U Users Manual*.

My Profile

Once logged in, L4U users are presented with the *My Profile* or the *Freedom Profile* page. The features available are divided into two categories: tasks specific to the user currently logged in or Administrative tasks which the user currently logged in can perform for themselves or other users.

Patron centric tasks available are Reserves, Renewals, Bookbags, Fines and Fines Histories, Histories & Basic Circulation.

Administrative tasks available are Freedom Circulation, Client Management, Acquisitions and Inventory and can be accessed via the L4U Freedom button.

The Library Administrator controls what options are available in *My Profile*. Only those features that have been enabled in *Preferences* and via the *Homeroom Freedom Privileges* settings will display here. For Example: *Reserves* or *Renewal* will only appear for those patrons that have this type of access.

My Profile outlines the details of the patron and their circulation activity. To view the items currently on loan, overdue or on reserve, click the appropriate tab for more detail.

If licensed for L4U Enterprise, select the location to be used in iPAC searches, if available.

My Profile

Jim Scanlon
 Homeroom: L8B1A8F
 Client Code: 18986
 Items Out: 11
 Items On Reserve/Booking: 0
 Fines: \$0.00
 Charges: \$0.00
 Last login: 1:01 PM, Saturday, December 22, 2007

Items Out | Reserves | History | Current Fines | Other Charges | Fines History

Accession#	Local Call #	Title	Return Date	Fines
000024	TR 006.6 HAR	Multimedia authoring workshop with Director 5, The	1/23/2008	\$0.00
000025	TR 004.6 WIL	Internet for teachers, The	1/23/2008	\$0.00
000050	TR 005.7 COM	Complete idiot's guide to creating an HTML 4 Web page, The	1/23/2008	\$0.00
001017	TR 004.145 SAL	BalmBot and palm organizers 1	10/6/2007	\$1.30
001392	TR 001.64 MOO	Mastering Microsoft Office 97	12/6/2007	\$1.20
001495	TR 004.67 GAR	Internet field trips	12/6/2007	\$1.20
015499	TR 006.6869 MIC	Microsoft Office PowerPoint 2003 step by step	12/6/2007	\$1.20
021805	TR 001.64 ROS	ClassWorks for certified teachers	1/23/2008	\$0.00
021806	TR 001.64 ROS	ClassWorks for certified teachers	1/23/2008	\$0.00
021807	TR 025.5 TUR	Complete library skills, grade 3, The	10/6/2007	\$1.20
021810	TR 025.5 TUR	Complete library skills, grade 6, The	10/6/2007	\$1.20

Records Per Page: 15 Page 1 Jump to Page # [] Go

Total Fines for Items still Out: \$7.20

Select Location to be used in iPAC Searches:

- ALL MY LOCATIONS
- HVE - Hillview Elementary
- VES - Vantage Elementary School

Items Out | Reserves | History | Current Fines | Other Charges | Fines History

Accession#	Local Call #	Title	Due Date	Fines
------------	--------------	-------	----------	-------

Total Fines for Items still Out: \$0.00

L4U Freedom Login

In order to access the L4U Freedom features, users must login to *My Profile* first, see “iPAC Login” on page 64. To login to Freedom:

1. From the *My Profile* page, click *L4U Freedom*
2. The *L4U Freedom Profile* appears



Note: Forced login enabled by the library administrator means all iPAC users have to login to access the iPAC features.

Freedom Profile



The Freedom Profile page has the *Freedom Toolbar* which allows quick access to the various functions.



The icons are, from left to right:

- Freedom Home:** Returns to the My Freedom Profile home page.
- Circulation:** Please see “L4U Freedom Circulation” on page 136.
- Client Management:** Please see “Freedom Client Management” on page 128.
- Library File:** Please see “Modifying the Library File” on page 106.
- Reserves:** Please see “Placing Reserves” on page 158.
- Reports:** Please see “Online Reports in L4U Freedom” on page 170.
- Acquisitions:** Please see “Freedom Acquisitions” on page 80.
- iPAC:** Returns to My Profile.

Freedom Dashboard

Once in one of the Freedom Functions, the Freedom Dashboard is available to navigate to a previous or next record as well as to Save your edits or to Cancel to discard your edits. Use the *Freedom Dashboard* navigation buttons (ie: Save, Next, Previous, Cancel, etc) and *not* the Internet Browser Forward and Back buttons.



- *My Profile* page. The logged in patron's items are listed under the *Items Out* tab.
- *My LAU Freedom Profile* page. Enter a patron in the Basic or Freedom Circulation and their items will be listed.

L4U Demo Library

Home Picture Search Multiback Advanced Messages New Items Link

My Profile **Logout**

Web Renewal Wizard

Jim Scanlon currently has 11 item(s) out.

Step 1

Please specify the Return Date or leave blank for loan type renewal (mm/dd/yyyy)

☐ Renew Overdue Items

Renewed Selected Items **Renew All Items**

Renew	Accession #	Call #	Title	Date Taken	Return Date	Fines
<input type="checkbox"/>	023B06	TR 001.64 R05	ClassWorks for certified teachers	9/7/2007	1/23/2008	\$0.00
<input type="checkbox"/>	023B05	TR 001.64 R05	ClassWorks for certified teachers	9/7/2007	1/23/2008	\$0.00
<input type="checkbox"/>	00005B	TR 005.7 COM	Complete idler's guide to creating an HTML 4 web page. The	9/7/2007	1/23/2008	\$0.00
<input type="checkbox"/>			... in HTML 4, grade 3 - the	9/7/2007	12/8/2007	\$1.16

From the *My Profile* screen, you can renew an item or all items currently checked out to you. Whether the renewal process includes overdue items or items renewed until a specific date depends upon the iPAC privilege settings assigned to your homeroom, see “Setting Web Privileges” on page 27. To renew items from Circulation in L4U Freedom, please refer see “Renew Items” on page 145.

1. From *My Profile* screen, click *Renewals*
2. The Web Renewal Wizard is displayed
3. Check the items to be renewed
4. If required, Check the *Renew Overdue Items* option
5. If a specific date is required, Enter the date by typing in the field provided or by using the pop up calendar.
6. Click *Renew Selected Items*



- [illegible]

In addition to the ability to perform renewals on specific items, patrons can renew all items currently checked out to them. The ability to renew overdue items or request renewals for a specific date is controlled by a setting in Homeroom Web Privileges. To renew all items:

- [illegible]

- 

69

Reserves

With L4U Freedom, patrons can place reserves via the web. Reserves can be placed via *My Profile* or from *Advanced Circulation*. This option is controlled through a Preference setting and the Homeroom Freedom privileges and can be enabled or disabled by the library administrator. Reserves can be placed on individual items from item detail view or multiple reserves can be placed on an entire bookbag.

Placing a Reserve from item detail view

1. While logged into the iPAC, search for the desired item and click the Title for details
2. Click *Place a Reserve*
3. Enter an optional *Requested For* date or use the pop up calendar
4. Enter an optional *Requested Until* date or use the pop up calendar
5. Click *Place Reserve*
 - A screen confirming the reservation will display.

Reserves on a Bookbag

Reserves can be placed on multiple items at one time. This is done by first collecting items into a bookbag. Please see “Working with Bookbags” on page 55 for more information on using a bookbag. To place a reserve on items in a bookbag:

1. While logged into the iPAC, search for the desired items and create a bookbag
2. Click *Bookbag* under the top toolbar
3. Click *Place a Reserve on Current Bookbag* below the Bookbag display area
4. Click *Place a Reserve*
5. Do one of the following:
 - Select the checkboxes beside the items to reserve and click *Reserve Selected Items*
 - Click *Reserve All Items*
6. The next page displays a listing of all reserves

Placing Reserves(s) on your Current Bookbag										
Current Bookbag has 7 items										
Reserve Selected Items					Reserve All Items					
Select	Accession#	Title	Author	Call Number	Media	Loan period	Copies In	Copies Out	# of Copies	
<input type="checkbox"/>	019618	21st century in space, The	Asimov, Isaac,	500.5 ASI	HCB	7	1	0	1	
<input type="checkbox"/>	019473	Amazing International Space Station, The		629.44 YES	PBK	7	1	0	1	
<input type="checkbox"/>	019319	Bleeps and blips to rocket ships	Hegedus, Alannah,	609.71 HEG	HCB	7	1	0	1	
<input type="checkbox"/>	019467	Earthling's guide to deep space, An	Summers, Carolyn,	629.4 SUM	PBK	7	1	0	1	
<input type="checkbox"/>	019463	In space	Johnstone, Michael,	629.4 JOH	HCB	7	1	0	1	
<input type="checkbox"/>	003818	Man who went to the dark side of the moon is, The	Schuyffert, Bea Uzuma,	921 COL	MIS	7	1	0	1	
<input type="checkbox"/>	019434	Planets, rockets, and other flying machines	Graham, Ian,	629.133 GRA	PBK	7	1	0	1	

Deleting iPAC Reserves

Once a reserve has been placed, patrons can view and delete reserves from the web. To view their reserves a patron first must log in to the iPAC. Once logged in the patron can access their reserves through *My Profile*. To view and delete reserves from *My Profile*:

1. On the iPAC home page, click *Login*
2. Enter the *Client Barcode* and the *PIN/Password*
3. Click *Login*
4. *My Profile* screen will appear, click *Reserves* button or click the *Reserves* tab
5. The Reserves screen appears with all current reserves listed.

L4U Demo Library

Home Picture Search MultiSeek Advanced Messages New Items Links

[My Profile](#) [Bookbag \(9\)](#) [Logout](#)

Reserves
Ben has 9 reserve(s)

[Place a Reserve](#) on all 9 items in your current Bookbag

[Delete Selected Reserves](#) [Delete All Reserves](#)

Select	Accession#	Title	Author	Call Number	Media	Loan period	Copies In	Copies Out	# of Copies
<input type="checkbox"/>	006122	"Let's get a pup!" said Kate.	Graham, Bob.	E GRA	MIS	14	1	0	1
<input type="checkbox"/>	003177	1,001 facts about dinosaurs	Clark, Neil.	567.9 CLA	MIS	14	1	0	1
<input type="checkbox"/>	003814	50 American heroes every kid should meet	Dienenberg, Dennis.	920.073 DEN	MIS	14	1	0	1
<input type="checkbox"/>	027475	Alphabet of dinosaurs: An	Dodson, Peter.	E DOD	MIS	14	1	0	1
<input type="checkbox"/>	011257	Arthur's new puppy	Brown, Marc Tolon.	E BRO	HCB	14	1	0	1
<input type="checkbox"/>	011257	Arthur's new puppy	Brown, Marc Tolon.	E BRO	HCB	14	1	0	1
<input type="checkbox"/>	011261	Arthur's pet business	Brown, Marc Tolon.	E BRO	PBK	14	1	0	1
<input type="checkbox"/>	018545	As long as there are whales	Daigle, Evelynne.	599.5 DAI	HCB	14	1	0	1
<input type="checkbox"/>	002176	Blue planet : The	Byatt, Andrew.	591.77 BYA	MIS	14	1	0	1

Home Picture Search MultiSeek Advanced Messages New Items Links

Powered by Kalena Software Ltd.'s award winning Library Automation Software - Library 4 Universal™
Copyright© 2006 Kalena Software Ltd. All Rights Reserved - Worldwide - C.I.O.

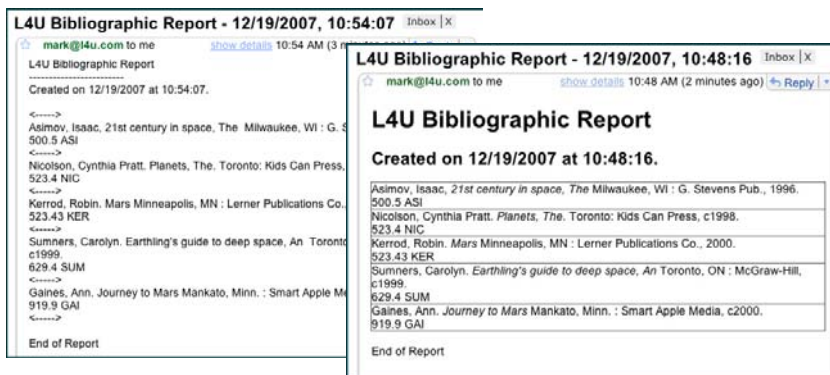
6. Do one of the following:
 - Select the checkboxes beside the items to remove from reserves and click *Delete Selected Reserves*
 - Click *Delete All Reserves*
7. If everything is correct, click *Confirm*
 - To make adjustments before finalizing the deletion, click *Go Back*
8. The iPAC returns to the updated reserves screen

Send Bookbag by Email

If enabled in their Homeroom preferences, patrons can send their bookbag contents to their email account. The bookbag can be sent in text or HTML format in a bibliographic listing. The email settings in Preferences have to be configured and the patron's email and mail server must be entered into the patron's record in Client Man-

agement before L4U can send the emails. Please see “Email” on page 52 in the *L4U Users Manual* for more information on how to enter global email settings. Your District Technician or IT Department will have this information. Patron specific information is entered in the respective patron record in the Client File. To Send a Bookbag List via email:

1. On the iPAC home page, click *Log In*
2. Create a bookbag
3. Click *My Profile*
4. Click *Email Bookbag*
5. The Email Bibliographic contents of the Bookbag screen will appear. If required, change the destination email.
6. Make any desired changes to the *Email Format Options & Sort Options*
7. Click *Send*. This may take up to 60 seconds depending on various email server settings.

Text Format

HTML Format

My History

If Client Histories are being maintained by the library (see “Item/Client Histories” on page 39 in the *L4U Users Manual*), then information about your current and previous circulations is available.

To view your history:

1. From any iPAC page, Login to My Profile, see “My Profile” on page 65.
2. From the *My Profile* screen, click *My History*

L4U Demo Library

L4U's Circulation History
Viewing 2 transactions

Buttons: Add to Bookbag, Display Bookbag, Empty Bookbag

	Title	Author	Call #	Media	Taken on	Returned on
<input type="checkbox"/>	Pigman, The.	Zindel, Paul.	FIC ZIN	PBK	12/21/2007, 15:14	12/24/2007, 09:55
<input type="checkbox"/>	Little drummer boy, The.		VID E LIT	VID	12/24/2007, 09:55	Item currently out

Powered by Kelowna Software Ltd.'s award winning Library Automation Software - Librarian Universal™
Copyright © 2008 Kelowna Software Ltd. All Rights Reserved - Worldwide C.I.D.

Basic Circulation on the Web

L4U Freedom users can perform Basic Circulation on the web in addition to Freedom Circulation. Basic Circulation allows library administrators to assign limited circulation privileges to trusted groups of library patrons. Control over what features of circulation are available to a user is specified in the user's Homeroom. For example, a librarian may allow teachers to circulate materials to their classes or allow self circulation but without all the features of full circulation. Please see “Setting Web Privileges” on page 27 for more information.

Checking Items Out

Circulation on the web can only take place after the patron has logged in with a valid client code and PIN/Password. Circulation and the various optional settings associated with it must be enabled prior to login. To perform basic circulation via the web:

1. From any iPAC page, Login to *My Profile*, see “My Profile” on page 65
2. On the *My Profile* page, click *Basic Circulation*
3. The basic circulation screen will automatically display with the currently logged-in patron's information, including any items that are currently checked out
 - Depending upon options selected in Web Privileges, this screen can include the patron picture

- Overdue items will display with a RED date due
- To circulate an item out to the current user, Enter the item barcode in the field provided
 - Click *Proceed*
 - The item Title and, if available the book cover will display with a status of *Outgoing*

Accession #	Call #	Title	Date Taken	Return Date
018367	595.4 BER	Do all spiders spin webs?	12/21/2006	1/8/2007
006122	E GRA	"Let's get a pup!" said Kate.	12/15/2006	1/8/2007
012156	E MUN	Wait and see	11/30/2006	12/22/2006



Note: To view more information about the patron account, such as, homeroom or fines owing, click the blue *Info* button to the right of the *Client Name*.

Circulating to Other Patrons

If enabled in the Web Privileges, patrons may be allowed to circulate items to other patrons. This type of circulation is performed the same as if you were circulating to yourself with the exception of entering the other client's barcode. To circulate to another patron:

- From any iPAC page, Login to *My Profile*, see "My Profile" on page 65
- On the *My Profile* page, click *Basic Circulation*
- The basic circulation screen will automatically display with the currently logged in patron's information, including items that are currently checked out
 - Depending upon options selected in Web Privileges, this screen can include the patron picture
- Scan or Enter the Client's barcode in the field provided. click *Proceed*. The new patron's information will appear

- To Search for a Client, type the patron's first or last name and then Click the Search icon. Type in the first and last name for a more accurate search

5. Scan or Enter the item barcode. Click *Proceed*
6. The item Title and, if available the book cover will display with a status of *Out-going*
7. If the same patron is checking out multiple items, repeat steps 8 and 9 for each item
8. To move on to a new patron, simply enter the client barcode and click *Proceed*.
9. This process can be repeated for as many patrons and/or items as necessary.



Note: At any point during circulation, if you need to clear the information displayed on the screen, click the red *Clear* button.

Checking Items In

If this option is selected in Web Privileges, patrons can check items in through the basic circulation feature. A patron must login with a valid client code and PIN/Password and then select the *Basic Circulation* from *My Profile*. To check an item in, simply enter the item barcode and click *Proceed*. The item information with a status of *Incoming* and the information for the patron that last borrowed the item will display.

Circulation Warnings

If a patron attempts to perform a function that has not been activated, they will receive a message under *Circulation Information* and the process will not be allowed.

L4U Platinum Demo Library

My Profile Logout

Basic Web Circulation

Enter Item or Client Barcode:

Client Name:

Fines: \$0.00 Items Out: 0/0

Item:

Circulation Information

Client has 1 item(s) OVERDUE. (msg#C21) Item Status: Cancelled (msg#CS1) 

Powered by Kelowna Software Ltd.'s award winning Library Automation Software - Library 4 Universal™
Copyright © 2006 Kelowna Software Ltd. All Rights Reserved - Worldwide - C1.0

Circulation Period Hierarchy

When an Item is checked Out from the Library, the length of time the Item will circulate for is determined by several settings (Example: Loan Type, Client File, Circulation, etc.). The circulation period can be controlled on several levels, therefore a hierarchy must exist with specific settings always taking precedence over others. The hierarchy is listed below from lowest priority to highest.

Loan Type Code

Each item in the library collection has a mandatory Loan Type Code. Loan Type Codes are assigned a circulation period. When an item is circulated, its due date is based on the number of days in its designated loan type circulation period.



Note: The Loan Type Code can be configured to override the Client's Circulation Override. To use this feature, see "Creating Loan Types" on page 75 in the *L4U Users Manual*.

Client Circulation Override

A Client's Circulation Override value will take precedence over the Loan Type Code circulation period. This setting is useful for patrons who require set circulation periods that usually exceed a normal Loan Type period. For Example: If a Patron with a Circulation Override of 10 days checks Out a book with a Loan Type Code set to 7 days, the due date will be 10 days from the current date.

Circtime Override

By selecting *Circtime Override* within Circulation, an alternative circulation period can be entered when checking an item Out. The value entered will override all other loan periods, excluding the Global Due date. A setting within Preferences will determine whether L4U requests a due date or the number of circulation days. To change this setting, see "Circtime Override Options" on page 46 in the *L4U Users Manual*.

Global Due Date

This is the highest level in the circulation hierarchy. For a district wide setting, this date is set in Preferences and is the last possible due date. This date will override all other circulation periods. Global Due Date can be used for collecting materials before an inventory or library closure. This date must be entered in the correct format for proper program functionality (MM/DD/YYYY). Locations can have their own Global Due Date and is discussed in "Location Due Date" on page 19 in the *Enterprise Administrator Manual*.

Log Out

It is best practice to always log out of L4U on the Web once you have completed your work. This ensures that no one else is able to view your account or perform transactions under your login. To log out of L4U on the Web:

1. Do one of the following:
 - From a Freedom page, click *iPAC* to return to *My Profile*, then Click *Log Out*
 - From any iPAC page, Click *Log Out*



2. Do one of the following:
 - Click *Yes, Logout and save my session* to return later. This option will have L4U restore the contents of your bookbag upon your next login
 - Click *Yes, Logout and delete my session*. This option deletes the contents of your bookbag
 - If you selected *Log Out* in error and would like to return to the iPAC, click *No, please return*
3. The iPAC home page appears



Quit iPAC

The steps to quit the L4U iPAC differ entirely depending upon your connection type. If you are accessing the iPAC through a web browser, on the browser menu, *File > Exit* or *File > Quit* depending on your operating system.



CHAPTER 4

DATA ENTRY

- Entering library items (Cataloging)
- Tips and tricks for data entry
- Copy Cataloging from the Library File
- Details of the Fields in the Bibliographic Record
- Using CheckMARC
- Importing MARC Records
- Searching for Items
- Modifying the Catalogued Materials
- Duplicating Items
- Deleting Items
- Printing Spine and Barcode Labels
- Posting to the Library File

Freedom Acquisitions

The Acquisition File acts as a *holding tank* for Items that are not yet ready for Circulation. It is the main point of bibliographic data entry into L4U. New Item records are created either through manual (original) entry or copy cataloging from materials in the Library File or from the Internet (CheckMARC). An Item record is any material or media type within the library collection. Acquisitions in L4U Freedom:

- is a place to store new items or items on order
- is a place to store items you hope to add to the collection
- does not make items available for circulation or searches in the iPAC
- the items can be modified after saving as long as they haven't been posted



Note: Control over what Freedom features are available to a user is specified in the user's Homeroom, see "Setting Web Privileges" on page 27.

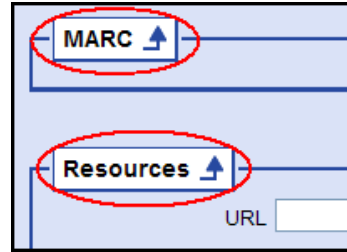
Navigating Freedom Acquisitions

Cataloging materials in L4U Freedom is quick and easy. Use the onscreen navigation buttons and links to quickly jump to the part of the record that needs attention. The buttons on the *Acquisitions Toolbar* select the corresponding Acquisitions section.



These buttons move to the top of the data entry screen. (See image to the right.)

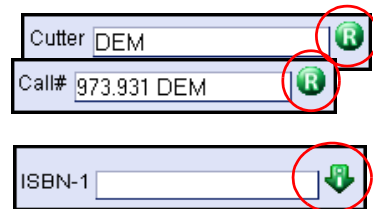
Anytime an Item record is added to the library collection, it should be entered into the Acquisitions File. This is the only area of the program in which an Item can exist without a unique Accession Number. This is how Items not currently circulating can be cataloged in advance.



Certain fields within an Item record are mandatory, including *Title*, *Status*, *Loan Type*, *Department*, *Media*, *Vendor*, *Publisher* and *Location*. All of these fields excluding *Title* use the default settings established in Preferences either Location specific or District wide, see “Acquisitions Defaults” on page 30 in the *L4U Users Manual*.

Tips and Tricks for Data Entry

- Use the *Freedom Dashboard* navigation buttons (ie: Save, Next, Previous, Cancel, etc) to move within Freedom and *not* the Internet Browser Forward and Back buttons.
- Press F11 on the keyboard to dismiss the Internet Explorer/Firefox navigation buttons. Press F11 to bring them back. More of the Freedom screen is now visible. Safari has similar commands via the View menu.
- To move between fields, use the mouse or TAB. To reverse direction SHIFT + TAB
- All fields with associated Authority Files or Control Files utilize drop down lists for easy entry. In the appropriate field, type in the first few characters and a list containing all matches will appear. Click the correct entry to select. If no match is found, simply continue typing.
- When entering data into a Control File field (Loan Type, Department, Location and so on), a complete list of all available codes can be viewed by typing @.
- *Cutter* will be automatically generated upon saving a new record. The *Cutter* is taken from the first three letters of the *Author's* last name. If no *Author* is present, L4U will use the first three letters of the *Title*.
- To quickly Rebuild the *Cutter* or *Local Call Number*, click the Rebuild Icon to the right of the corresponding field.
- Copy Cataloging shortcut buttons are available for *ISBN* and *Title* and speeds up data entry. See page 83.



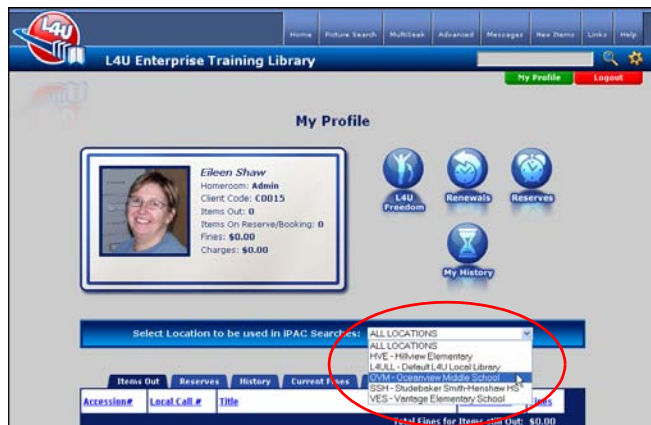
- If a *Title* is entered starting with an article (The, An, A, etc.), L4U will automatically move it to the end of the *Title* when the record is saved.
- When selecting Tag # in Description area, the Up and Down Arrows can be used to navigate to the correct MARC Tag or just type the Tag # in the tag field.
- To Delete a line of unwanted data, click the **X** icon to the right of the unwanted line.
- Many new materials have a UPC bar-code which is the ISBN-13. Look at the number under the UPC. If it starts with 978, Scan this barcode into the *ISBN* field and then click CheckMARC.
- To exit the Acquisition record without saving, click *Cancel*, *Acquisitions Home* or *Exit* from the appropriate *Toolbar*.



- Log Out of Freedom (see “Log Out” on page 77) instead of just closing the Internet Browser window.

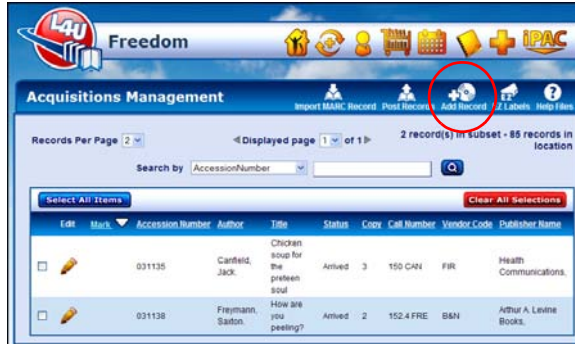
Cataloging in a Union Catalog with L4U Enterprise

A Union catalogue is the combined holdings of two or more libraries or collections. If the library administrator allows you to catalog for more than one collection, L4U needs to know which collection your administrative tasks will affect. If so, Select a location from the drop down list before performing Freedom administrative tasks. If the drop down list is not available, then you have access to only one collection.



To Create an Item Record

1. In iPAC, login to *Freedom*, see “L4U Freedom Login” on page 66

2. Click *Acquisitions*3. Click *Add Record*

- The *Accession #* and various other fields will automatically be entered using the default settings in Preferences. To change these default settings, see “Acquisitions Defaults” on page 30 in the *L4U Users Manual*.
4. Tab or Click between fields to enter all relevant information
 5. Scroll or tab to the various Sections to enter additional information
 - See the following Field Definitions for specific information on data entry
 6. Click *Save*
 - To exit without saving, Click *Cancel* or Click *Clear*

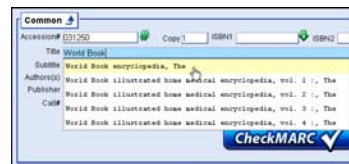


Warning: Data additions or modifications will only be saved once the *Save* button has been clicked. If the record is exited without clicking *Save*, all data additions or modifications for this record will be discarded.

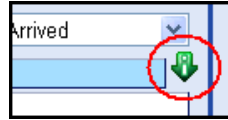
Copy Cataloging from the Library File

L4U can speed up cataloging by pulling bibliographic information from items currently in your collection. This is known as Copy Cataloging. If L4U locates a match while entering an ISBN or a Title, clicking the Copy button will pull the item’s information from the Library File. To Copy Catalog during Item Entry:

1. From Acquisitions Management screen, Click *Add Record*
2. Click in the *ISBN* or *Title* field and start typing the ISBN or Title respectively
3. After a few characters, L4U may find a match and display them in a drop down list.
4. Click the desired item.



5. Click the green arrow at the end of the Title field if the search was performed on Title or at the end of ISBN field if the search was performed on ISBN.
6. L4U copies the MARC record from the Library File
7. Make any desired edits
8. Click *Save*



Field Definitions

Field definitions are provided for those fields with special requirements and/or options. An explanation of the available fields within the Common screen follows.

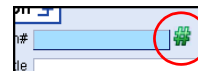
Common

This is the Primary Information for the catalogued material.

Accession

Accession # is also known as the barcode. This field should contain a unique *Accession #* within the local collection, although this accession number may be in use at another location.

- If using pre-printed barcodes, scan the barcode into this field after affixing the barcode to the item being catalogued.
- If L4U is generating the *Accession #*, Click the # icon to generate the next *Accession #*.



L4U can be configured to generate the next *Accession #* on a location by location basis or district wide. Please see *Barcodes* in the L4U User Manual for more information.



Note: The *Accession Number* of an item can only be modified or left blank while the item remains in the Acquisitions File. Once the record has been Posted to the Library File, the *Accession #* becomes fixed and cannot be edited. The *Accession Number & Title* are the two mandatory fields in a new item.

Copy

When items are duplicated using the *Duplicate* button, the program automatically increments the *Copy Number* by one for every additional copy of the item. This field represents the total copies for that title in that location.

ISBN

The *International Standard Book Number* assigned to each edition of a book as determined by designated agencies in each country participating in the ISBN program. Enter either 10 or 13 digit ISBN's as appropriate with or without hyphens.

Status

This is a required field that describes the availability of an Item. Although an Item may have any Status while in the Acquisition File, it must have a Status of *Arrived* before it can be posted to the Library File. Once in the Library File, a record must have a Status of *In* for it to be available for circulation.

Title

All Library Items must have a *Title*. To enter a *Title*, type in the first few characters, and a list containing all matches will appear. Click the correct entry to select. Click the *Green Arrow* icon to copy the bibliographic from the Library File. Please refer to “Copy Cataloging from the Library File” on page 83 for more info on Copy Cataloging. If no match is found, simply continue typing.

**Subtitle**

The Subtitle is used for the remainder of the Title. This may include a parallel Title or other Title information.

Edition

Information relating to the edition of a work as determined by applicable cataloging rules.

Author, Author 2

These fields contain the names of the person, or persons, responsible for the creation of an item. Standard practice is to enter the Author's name in reverse order. For Example: Blume, Judy. This field may also contain the name of a corporate body or conference responsible for the creation of the item. To enter an *Author* or *Author2*, type in the first few characters and a list containing all matches will appear. Click the correct entry to select. If no match is found, simply continue typing. The new Author will automatically be added to the Authority File when the item record is saved.

Publisher

Publisher is a mandatory field for which an Authority File is maintained. To enter a *Publisher*, type in the first few characters and a list containing all matches will appear. Click the correct entry to select.

Pl/Pub

A Place of Publication can be entered with an associated Publisher in the Control File, see “Creating Publishers” on page 84 in the *L4U Users Manual*. By doing so, the Place of Publication will automatically be entered when the Publisher is selected. If no associated Publisher has been assigned, simply Click in the *Pl/Pub* field and type in the appropriate information.

Yr of Pub

The copyright date or year of publication is entered in this field.

Call #

The *Call #* or the shelf location of an item is entered in this field. If left blank, upon saving the record L4U will automatically generate a *Call #* comprised of the *Loan Type*, *Dewey* and *Cutter*. To prevent L4U from automatically adding the Loan Type to the *Call #*, see “Automatic Local Call Numbers” on page 31 in the *L4U Users Manual*. To quickly rebuild the *Local Call Number*, click the *Rebuild Icon* to the right of the field, see page 81.

**Dewey/LC**

This field contains either the *Dewey* classification or elements of the *Library of Congress Call Number*.

Cutter

If left blank, upon saving the record L4U will generate a *Cutter* consisting of the first three characters of the *Author* field. If the *Author* field is blank, L4U will use the first three characters of the *Title* as the *Cutter*. The *Cutter* also appears as the Call Letters, which follow the *Dewey* in the *Call #*. To quickly rebuild the *Cutter*, click the Rebuild Icon to the right of the field, see page 81.

LCCN

The Library of Congress Control Number (*LCCN*) is a unique number assigned to a USMARC record by the Library of Congress.

CheckMARC

CheckMARC Platinum is a cataloging tool built in to L4U. Please “CheckMARC in Freedom Acquisitions” on page 94 for more information.

Main

The *Main Screen* section contains the important Control Files and other fields.

The screenshot shows a web-based form titled "Main" with a blue header bar. The form is organized into several sections:

- Control Files:** A grid of dropdown menus for Loan Type (REG), Media (HCB), Department (MIS), Vendor (MIS), and Location (L4ULL). Each dropdown has a list of options visible, such as "Regular", "Hardcover Book", "Miscellaneous", "Default L4U Local Library", etc.
- Editor/Illustrator:** A text input field containing "Time-Life student library".
- Level:** A dropdown menu set to "Senior".
- Condition:** A text input field.
- Cost:** A text input field containing "20".
- RV:** A text input field containing "27".
- ISSN:** A text input field.
- Volume/Issue:** A text input field.
- Pages:** A text input field containing "288 p".
- Entry/Issue:** A text input field.
- User Defined Fields:** A section with a blue header and three text input fields labeled "Field 1", "Field 2", and "Field 3".

Loan Type

Loan Type is a mandatory field. The code entered here determines the circulation period of the item. To Enter a Loan Type, type in the first character and a list containing all matches will appear. Click the correct entry to select.

Media

Media is a mandatory field. The code entered here is the General Material Designation. To enter the Media, type in the first character and a list containing all matches will appear. Click the correct entry to select.

Department

Department is a mandatory field and is entered in the same manner as the Media and Loan Type. To enter the Department, type in the first character and a list containing all matches will appear. Click the correct entry to select. If it is necessary to hide an item from the iPAC, it is done so through the use of Departments. For more information on the uses for Departments, see "Departments" on page 81 in the *L4U Users Manual*.

Vendor

Vendor is a mandatory field and is entered in the same manner as Loan Type. To enter the Vendor, type in the first character and a list containing all matches will appear. Click the correct entry to select. The Vendor code entered here is used to identify the source of the material being cataloged.

Location

The *Location* field is usually set by the L4U Enterprise Administrator. Please see "Cataloging in a Union Catalog with L4U Enterprise" on page 82.

Editor/Illustrator

This field contains the Editor or Illustrator information. To enter an *Editor/Illustrator*, type in the first few characters and a list containing all matches will appear. Click the correct entry to select. This information can also be copied and pasted from the *Added Entries* Tab.

Series

Series is a collective title used for a group of items that also possess individual titles. To enter the Series, type in the first few characters and a list containing all matches will appear. Click the correct entry to select. If no match is found, simply continue typing. The new *Series* will automatically be added to the Authority File when the record is saved.

Level

This field is used for information that identifies the specific audience or intellectual level for which the content of the described item is considered appropriate. The designation can be either reading, interest or age level.

Condition

The *Condition* field allows users to identify and track the condition or state of the item.

Cost

The *Cost* is the original price of the item at the time of purchase. This field is necessary in order for other features such as Purchasing, Orders, Claims and Serials to work effectively.

RV

The Replacement Value (*RV*) of an item, the expense incurred by the library to replace the item if it were to be damaged or lost, is designated by the user. RV can be assigned automatically using a formula based on the Cost. This formula is entered in Preferences, see “Replacement Value” on page 32 in the *L4U Users Manual*.

ISSN

The International Standard Serial Number (*ISSN*) is assigned to a serial publication by a national center under the auspices of the International Serials Data System.

Volume/Issue

L4U will automatically populate this field when generating multiple Issues for a Serial. This field can also be used to track the Volume designation of the individual item within a Series.

Pages

This field is reserved for the physical description of the item being cataloged. More specifically, the extent information should be entered here.

Entry/Issue

The date the item is originally entered into the data file is automatically entered here. This field can be modified when the item is posted to the Library File, or when the Status is changed.

User Field 1 - 3

These fields are provided to the user for additional administrative information. They are locally defined and can be searched and viewed only in the Administration level.



Note: User Fields cannot be renamed but can be exported as part of the MARC record.

Subjects

All Subjects are added to an individual Item record from *Subjects*. Subjects can be used from the existing Subject File and new Subjects can be created.

Subjects	
Subject Astronomy—Observers' manuals.	Tag 650ax
Subject Astronomy	Tag 650a
Subject	Tag 650a

Adding a Subject

1. While in an Item record, Click *Subjects* icon in the Navigation Bar
2. In the field provided, Enter the first few characters of a Subject
 - A list of Subjects appear that start with the search criteria
 - If the required Subject is not displayed in the list, type out the complete Subject
3. Highlight the appropriate Subject in the list
 - Tab or Click to the *Tag* field and Enter the appropriate Tag/Subtags or Tab or Click to the next *Subject* field to accept the default Tag/Subtag.
 - The Subject is now added to the list
4. Continue to Tab or Click to the next *Subject* field to add extra Subjects
 - Click the **X** icon to the right of an unwanted Subject to delete
5. Click in any other field to finish entering Subjects

Tag 650ax	
Tag 650a	X
Tag 650a	X

Description

The Description field can be comprised of various types of information such as Summary, Bibliography, Statement of Responsibility, etc. These data types can be assigned to their individual MARC tags when creating new materials or when editing the material. If specific MARC tags are not necessary, just enter the description as needed into one Description entry. All data entered in this way will be saved in the MARC record under the 500a tag. To enter a Description:

1. While in an Item record, Click *Description* icon in the Navigation Bar
2. In the field provided, Enter the Description
3. Tab or Click to the *Tag* field and Enter the appropriate Tag/Subtag or Tab or Click to the next *Description* field to accept the default Tag/Subtag.
4. Continue to Tab or Click to the next *Description* field to add extra Description.
 - Click the **X** icon to the right of an unwanted line to delete
5. Click in any other field to finish entering the Description



Note: Keywords are created after the item is saved.

Added Entries

The *Added Entries* section stores names, titles and/or terms that provide access to a record that is not given through the main fields. This field is used for entries such as additional persons responsible for the creation of an item (translators, photographers, etc.), additional titles, and/or translations of a title. To create an Added Entry:

1. While in an Item record, Click *Added Entry* icon in the Navigation Bar
2. In the field provided, Enter the data
3. Tab or Click to the *Tag* field and Enter the appropriate Tag/Subtag or Tab or Click to the next Entry field to accept the default Tag/Subtag.

4. Continue to Tab or Click to the next *Entry* field to add extra Entries.
 - Click the **X** icon to the right of an unwanted line to delete
5. Click in any other field to finish entering the Added Entries

Info

The *Info* section contains fields such as *Donated By*. Although these fields are not mandatory, *PO#* and *Entry/Issue* (see page 89) are useful when using the Claims feature of LAU.

Donated By

If applicable, enter the name of the individual or organization that funded or donated the item. This field may also be used to track the budget source.

Imported Via

This field tracks the origins of imported records, and is entered automatically. When records are imported from a vendor disk for example, the source (File-name) of the record will appear in this field.

Duration

Enter the playing time of videos or filmstrips, etc. The standard format for entry is hhmmss.

Bibliographic Note

Sometimes it is desirable to record information about an item when that item is being circulated. This is useful for Temporary Barcodes (see page 154). Also, use it to record extra information about an item, such as kit contents or items that have to be returned with the item. If the Department Code is VF, then the Bibliographic Note will appear when the item is circulated In or Out.

PO#

The Purchase Order Number can be manually entered or assigned by default. If a large number of materials are being catalogued from one purchase, set the *PO #* as a default in Preferences, (see “Administration” on page 29 of the

L4U Users Manual) and the purchase order number will automatically be generated and entered in this field.

Model #

Model #'s can be entered to help identify pieces of equipment within the library collection. For Example: VCRs, projectors, etc.

Serial #

Libraries often maintain multiples of the same equipment. For Example: VCRs, televisions, computers, etc. Individual Serial #'s can be entered to differentiate between similar items.

Resources

URLs (Universal Resource Locators), or Web site addresses associated with the Item can be entered in this tab. These links and /or their 'friendly' name are displayed when the record is viewed from the iPAC. The URLs, or links, can be accessed directly from the library record. This feature can also be used to link files to a record such as eBooks or other eResources. The process for Adding files is similar to that of a URL.

Adding URLs

Often it is helpful to include related website addresses to items within your collection. These links can be accessed by the patron as they view the item record online. To add a URL to an item record:

1. While in an item record, Click the *Resources* icon in the *Acquisition Toolbar*
2. Enter the full website address in *URL*
 - Enter http:// and www if applicable. (This ensures that the URL works properly, even in older Internet browsers)
3. Enter the name as it is to appear on the iPAC screens in the *URL Name*
4. To add more URL's, Click the *Green Plus* button or to delete a URL, Click the *Red X* button

Adding Resources

In addition to attaching a URL to an item record, L4U can attach practically any file to an item record. It is up to the internet browser to open and properly display the file type. Files such as .jpg, .gif, .png, .wmv, .mpg, .mov, .wav & .pdf can be opened by a modern browser. The file is not externally referenced, but is added to the datafile. To



add a resource to an item record:

1. While in an item record, Click the *Resources* icon in the *Acquisition Toolbar*
2. Enter the *Display Name* under *File Resources* (the name as it is to appear in the iPAC)
3. Click *Upload*
4. Click *Browse* and navigate to the file location
 - After locating the file, Click *Open*
5. Click *Upload*

Bookcover

L4U will attempt to locate a bookcover and include it with the L4U record. Sometimes a CheckMARC search fails to locate a bookcover. L4U can search Amazon for a bookcover that matches the item's ISBN. To do so:

1. Locate the item using Quick Search or any other means
2. Open the item by double clicking it or Click the pencil icon
3. Verify the item has a valid ISBN10 or 13
 - If the ISBN is missing from the ISBN 1 field, L4U will attempt to find a bookcover with a combination of Title, Author and Publisher.
4. Click the *Resources* icon in the Acquisition File Management toolbar or scroll down to the Resources section
5. Click *Search the Web for a Bookcover*
6. L4U will either:
 - *Find a Bookcover* Click *Save* to save the item with the new bookcover



- *Find an Incorrect Bookcover* If the ISBN is correct but it is the wrong bookcover, either Click Cancel to discard this selection or try the suggestion below in *Find No Bookcover*
 - *Find No Bookcover* Go to Amazon.com and perform a title search for the material. Copy the ISBN13 from the item's record and try that ISBN for the bookcover search.
7. Click *Save* or *Cancel* as appropriate.

CheckMARC in Freedom Acquisitions

CheckMARC Platinum is a cataloging tool built into L4U. This service is included and is annually renewed as a subscription. Installations that are licensed to include CheckMARC Platinum have the ability to search multiple MARC record providers simultaneously. Currently, those locations include Library of Congress (LOC), Amazon.com and CheckMARC (CheckMARC is the MARC record database maintained by L4U Library Software).

CheckMARC is first configured in the Preferences area of L4U and then is used within the Acquisitions file. CheckMARC increases cataloging efficiency by searching for and importing MARC records directly from the cataloging screen. Catalogers simply enter as little or as much information as desired (For Example: ISBN and Title) and then Click the CheckMARC icon. L4U automatically searches the activated MARC sites and displays all matching results. Cataloguers can then review the various matching records and select the one they wish to use. The record is imported into L4U with the click of a button and then any necessary changes and/or additions can be made to the record. This process can increase cataloging speed by up to eighty percent.

CheckMARC Setup

The District Librarian would setup and configure CheckMARC prior to first use of the software. CheckMARC must be enabled in your License Number before the CheckMARC preferences become available. If you open Preferences and the CheckMARC options are inaccessible, your license may not be entered correctly. Contact L4U Library Software for information on purchasing CheckMARC Platinum or obtaining the correct license number. Please refer to *CheckMARC Setup* in the L4U Users Manual for information on CheckMARC preferences.

Cataloging with CheckMARC

Once the preferences have been set for CheckMARC you are ready to start cataloging. As with normal item record entry, this takes place in Freedom Acquisitions. To catalog with CheckMARC:

1. In iPAC, login to *Freedom*, see "L4U Freedom Login" on page 66
2. Click *Acquisitions*
3. Click *Add Record*

4. Enter as much or as little data as preferred
 - The more information provided, the more accurate the search
 - Ideally, the ISBN or LCCN and Title are used
5. Click *CheckMARC*
6. *Steps are continued on page 97*



Note: Press ESCAPE to cancel the CheckMARC Search.

The screenshot shows the 'L4U Freedom' software interface. The 'Acquisitions' window is open, displaying a form with fields for Accession#, Title, Subtitle, Author(s), Publisher, and ISBN. The 'CheckMARC' button is highlighted with a red circle. A magnified inset shows the 'CheckMARC' button with a checkmark and the word 'Searching' below it.

Selecting a Record

The search is conducted first using the ISBN or LCCN and then if no match is found, L4U will continue searching using the fields of data entered. For Example: If you enter a record with the ISBN, Title and Author, Series or Publisher, L4U will try searching by the ISBN. If no match is found, L4U will search using the Title. If still no match is found, L4U will use the author and so on through all the available data. L4U will automatically display the best match as the default in the Online Search Results screen. The best match being first from the LOC, then CheckMARC and then Amazon. Each location has a tab with a counter. This counter lists the number of

matches obtained from each of the locations and the highlighted tab represents the location that the currently displayed record is from.

CheckMARC Results

Start a New Search

Library of Congress, 1 Hits | **CheckMARC, 0 Hits** | Amazon, 1 Hits

#	Title	Author	Publisher	ISBN	LCCN	Place of Publication	Date
1	Cataloging and Classification	Chan, Lois Mai	McGraw-Hill	0070105065 (alk. pap)	0070105065 (alk. pap)	New York :	c1994.

Collapse Import

Tag	Ind	Sub	Data	L4U Field
001			3469158	001 Field
005			20020907203530.0	005 Field
008			930430s1994 nyua b 001 0 eng	008 Field
010		\$a	93022606	LCCN
020		\$a	0070105065 (alk. paper)	ISBN
035		\$9	(DLC) 93022606	Not mapped
040		\$a	DLC	Not mapped
040		\$c	DLC	Not mapped
040		\$d	DLC	Not mapped
043		\$a	n-us---	Not mapped
050	00	\$a	Z693.5.U6	Not mapped
050	00	\$b	C48 1994	Not mapped

Bookcover

CATALOGING AND CLASSIFICATION
An Encyclopedia
LOIS MAI CHAN

Record Matches by Location

If the counter indicates that matching records have been obtained from the various locations, these results lists can be viewed by Clicking on the appropriate tab, then scrolling down to see more results than the suggested hit. To view the details of a specific record in the list, simply Click the Title of the desired record. Click *Collapse* to hide the detail of the selected record.

CheckMARC Results

Start a New Search

Library of Congress, 10 Hits | **CheckMARC, 0 Hits** | Amazon, 10 Hits

#	Title	Author	Publisher	ISBN	LCCN	Place of Publication	Date
2	Harry Potter and the Philosopher's Stone	Rowling, J.K.	Warner Books	0439715600	0439715600	New York :	2000-07-25

Collapse Import

Tag	Ind	Sub	Data	L4U Field
001			0439715600	001 Field
005			20000725100000.0	005 Field
008			2000 00 000 0 eng	008 Field
010		\$a	0439715600	LCCN
020		\$a	0439715600	ISBN
035		\$9	(DLC) 0439715600	Not mapped
040		\$a	DLC	Not mapped
040		\$c	DLC	Not mapped
040		\$d	DLC	Not mapped
043		\$a	n-us---	Not mapped
050	00	\$a	Z693.5.U6	Not mapped
050	00	\$b	C48 1994	Not mapped

Bookcover

HARRY POTTER AND THE PHILOSOPHER'S STONE
J.K. ROWLING
ILLUSTRATED BY JIM KAY

Viewing Record Detail

Individual record detail is viewed by Clicking the title of the record in the list view. Check-MARC loads the item and displays it below the *Collapse* and *Import* buttons. This view shows the record in tagged display and includes the *L4U Field* that each tag and sub-field is mapped to. View the complete record by using the scroll bar to the right of the record data.

The screenshot shows the 'CheckMARC Results' interface. At the top, there are search filters for 'Library of Congress, 50 Hits', 'CheckMARC, 316 Hits', and 'Amazon, 50 Hits'. Below this is a table with columns: #, Title, Author, Publisher, ISBN, LCCN, Place of Publication, and Date. Three records are listed. Below the table are 'Collapse' and 'Import' buttons. To the right is a 'Bookcover' section showing a book cover for 'Harry Potter and the Chamber of Secrets'. Below the table is a detailed view of the first record, showing tags and sub-fields mapped to L4U fields.

#	Title	Author	Publisher	ISBN	LCCN	Place of Publication	Date
1	Harry Potter and the Chamber of Secrets (Book 2)	Rowling, J. K.	Arthur A. Levine Books	0545010225	0545010225		2007-07-21
2	Harry Potter: The True Story of a Boy Who Saved the World, and the Magic He Did	Anelli, Melissa	Pocket	1416554955	1416554955		2008-11-04
3	Harry Potter Schoolbooks Box Set From the Library of Hogwarts: Fantastic Beasts and Where to Find Them, Goblins Through the Ages	Rowling, J.K.	Arthur A. Levine Books	043932162X	043932162X		2001-11-01

Tag	Ind	Sub	Data	L4U Field
020		\$a	043932162X	ISBN
020		\$c	\$14.99	Cost
082		\$a	623.914	Dewey LC
100	0	\$a	Rowling, J.K.	Author
245	10	\$a	Harry Potter Schoolbooks Box Set From the Library of Hogwarts: Fantastic Beasts and Where to Find Them, Goblins Through the Ages	Title
245	10	\$b	Hardcover	Media
250		\$a	1st American Edition	Edition
260		\$0	Arthur A. Levine Books,	Publisher Name
260		\$c	2001	Pub Year
260		\$a	[0-1]	Place of Pub

Saving a Record

Once you have located a record that you wish to use, you will need to save it in the Acquisitions file. From there, you can then edit the import per your local cataloging rules. These steps are continued from above:

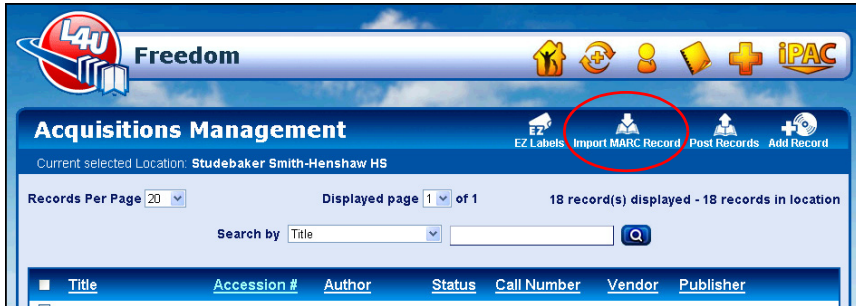
7. The *Online Search Results* screen appears with the default record displayed
 - If no records are found, a message appears. Click *OK* to clear it.
8. View the alternate records to ensure this is the record you wish to use
9. Click *Import*
 - If no record is appropriate, Click *Start New Search* and redefine your search or catalog the item manually
10. The Acquisitions cataloging screen appears with all the data automatically entered
11. Review the record and make any additional cataloging changes required
12. Click *Save*

The screenshot shows the 'L4U Freedom Acquisitions' interface. It has a top navigation bar with icons for Acquisitions, Home, Cataloging, Main, Subjects, Description, Added Entries, Info, Research, and Exit. Below this is a form for entering acquisition data. The 'Common' section includes fields for Accession (00000), Copy (1), ISBN-1 (043932162X), ISBN-2, Status (Arrived), Title (Harry Potter Schoolbooks Box Set From the Library of Hogwarts: Fantastic Beasts), Edition, Author (Rowling, J.K.), Publisher (Arthur A. Levine Books), PIPub (0-1), Yr of Pub (2001), Call (Dewey LC 623.914), and LCCN. The 'Main' section includes fields for Loan Type P/C (Fiction), Edition (1st), ISBN, Vendor (M), Miscellaneous, Serial, Volume/Issue, Department (M), Level (Ages 4-8), Page(s), Vendor (M), Miscellaneous, Condition, and Estimate (117.40/1000). The 'User Defined Fields' section has three empty fields.

Importing MARC Records

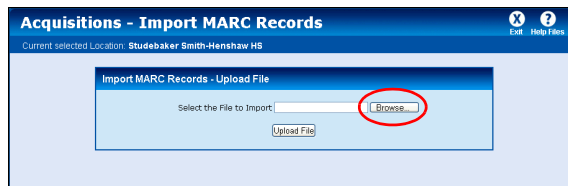
Importing MARC records is the most efficient means of creating a complete library collection. Although MARC records can be downloaded or entered manually, importing MARC record files from vendors or other cataloging sources can save valuable time. When importing MARC Records, it is helpful to know the holdings fields that

are used within the records, see “Holdings Fields” on page 310 of the *L4U Users Manual*. If this information is not provided by the supplier, there is an opportunity during the import process to verify the necessary information.



To Import MARC records:

1. From Acquisitions Management, Click *Import MARC Records*
2. Click *Browse*



3. In the open dialog, Locate and Click the appropriate file, Click *Open*
 - Click the *Acquisitions* button or *Exit* to return to the previous screen if you're not ready to import
4. Click *Upload File*
5. Choose the necessary options. See “MARC Options” below for more information on these options
6. Click *Import*
7. A screen appears indicating the import is being performed on the L4U Server, Click *Return to Acquisition Main Page* to return to Acquisition Management or *Go Back* to the Import MARC Records screen to import another MARC file

MARC Import Options

MARC Options

File to Import: MARC_22_records_Better.txt

Diacritical Processing: No Processing (UTF-8)

MARC Template To Use: Master Template

Accession (Barcode) Numbers:

☒ Leave Accession Numbers Blank

☐ Let L4U Assign Next Accession Number

☐ Use Accession Number From MARC Record

Select Fields To Import:

☒ Local Call Number ☒ Loan Type ☒ Cutter

Advanced Features:

☐ Attach Imported Cutter to Imported Call Number

☐ Take Dewey from Imported Local Call Number

☐ Import Files as MicroLIF (1987) protocol

Import

Diacritical Processing

Diacritics (accented characters in French, Spanish, etc.) can produce undesirable results if the proper processing is not selected. MARC record vendors adoption of one standard over another is slow so there are several options to choose from in L4U. They are:

- *No Processing (UTF-8)*: this is the default choice and is becoming a industry standard in the World Wide Web.
- *Regular iso-8559-1*: an older encoding method that supports diacritics better.
- *iso-8559-1 and DOS postprocessing*: many book vendors still use this method to encode their MARC records and is recommended if diacritics do not display properly after importing.

However, if one option does not produce the desired results after importing, select another option and re-import.

MARC Template To Use

- From the *MARC Template To Use* drop down menu, Select the appropriate template.

For information on creating and modifying templates, see page 320 of the L4U Users Manual.

Accession (Barcode) Numbers

- If pre-printed barcodes are being used, then select *Leave Accession Numbers Blank*. These numbers can then be assigned manually in the Acquisitions File prior to posting.
- *Let L4U Assign Next Accession Number* will automatically generate numbers based on the Preference Settings. A confirmation screen appears to verify next available number.

- *Use Accession Number from the MARC Record* should be used only if the records contain Accession Numbers and the Import template is set up to accept them.

Select Fields to Import

The options in this section enable the user to import specific fields. These fields must exist in the MARC record, and the tags must be assigned in the import template. If the data does not exist or the tags are incorrect, the fields will be left empty. When the data does not exist in the MARC record, do not select the option to import and L4U will generate the field using Entry Defaults. The Current Location is assigned to the imported data. See “Cataloging in a Union Catalog with L4U Enterprise” on page 82 for more information.

Advanced Features

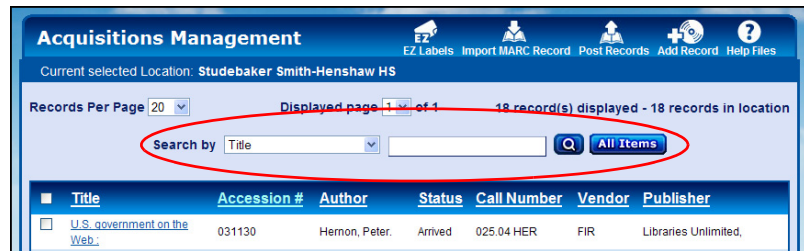
- *Attach Imported Cutter to Imported Call Number* is used if the call number has been broken into two separate Tags. *Cutter* and *Local Call Number* must be selected in *Select Fields to Import* before this option is enabled.
- *Take Dewey from Imported Local Call Number* creates a separate Dewey field using the first component of the Local Call Number. This option does not recognize alpha designations (Example: FIC).
- *Import files as MicroLIF (1987) protocol* must be selected when importing MicroLIF records.



Note: L4U uses the Import Template when importing MicroLIF records and will default to the one selected. Users who need to import MicroLIF records on a regular basis may wish to create a special MicroLIF Import Template to use in place of the standard MARC import template provided with L4U.

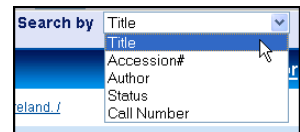
Search

Locating an item in Acquisitions is quick and easy. Once the item is found, it can be modified as required.



To Search in Freedom Acquisitions:

1. In Freedom Acquisitions Management, Click into the search area and start typing.
2. To change the field to search, Click the *Search by* dropdown and select the desired field.
3. Click the *Magnifying Glass* to start the search.
 - To start another search, type in new search information and click the *Magnifying Glass*
4. Click *View All* to Show All the items in Acquisition when finished if desired.



Modifying Items

The item can be modified after it is saved. This allows for edits or corrections to import or cataloging errors before committing the record to the Library File. All MARC tags data assigned to an L4U field will be saved. Please see “What is MARC?” on page 310 and “Master Import Template” on page 319 of the *L4U Users Manual* for more information on this feature. To modify an item:

1. In iPAC, login to *Freedom*, see “L4U Freedom Login” on page 66
2. Click *Acquisitions*
3. Click the Pencil of the item that needs editing or just double click the item.
4. Make any changes.
5. Click *Save* when finished or *Cancel* to discard your edits.



Duplicate

Once an item is entered in the Acquisitions File, it can be duplicated or copied as many times as required. This saves having to re-enter the same information for multiple copies of the same item. This feature is especially useful for item records such as textbooks, novel sets or encyclopedias. To create multiple copies:

1. Either:

- Create a new item record and Save it
 - If the Item already exists, Locate the item and Click the Title to open it
2. Click *Duplicate* on the Dashboard
 3. In the request screen that appears, Enter the number of additional copies required
 4. Click *Proceed*



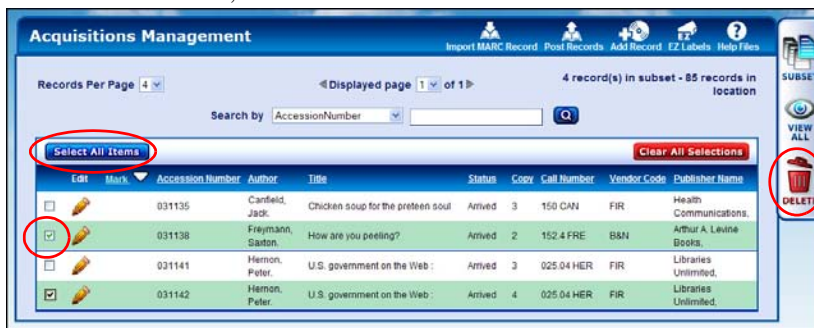
Clear All Selections

L4U Freedom will remember selections or subsets when switching between different Freedom functions. For example, if 12 items in Acquisitions has 7 items selected and then you switch to Library File to check on some other items, the 7 selected items will still be selected when you return. If this is not desired, click Clear All Selections and all selected items will become unchecked.



Delete

If it is decided an item or a number of items are not needed in Acquisitions, they can be deleted one at a time, a selected number of items or the entire selection.



To Delete items:

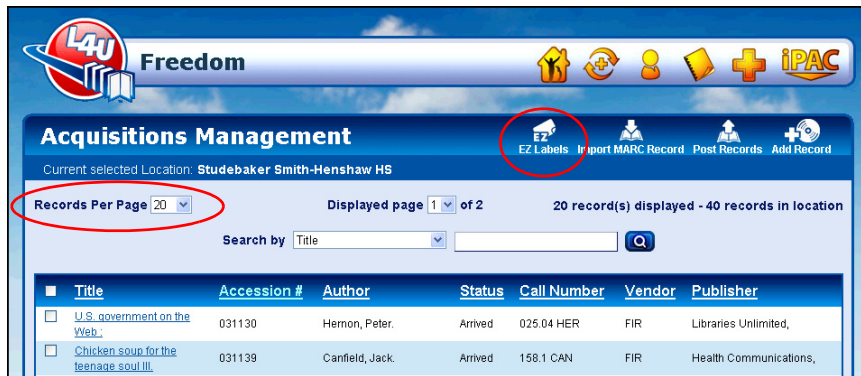
1. In Freedom Acquisitions Management, Click the check box beside the item(s) that need to be deleted.
2. To select all the items in the current subset or view, Click *Select All Items*. In the above example, all four items would be selected if *Select All* is clicked, not all 64 items in Acquisitions.
3. Click *Delete*.
4. Click *OK* to confirm the deletion.



Note: Select All Items will only select only the items in the current view. For example, if Records Per Page is set to 20 and there are 80 items in Acquisitions and all items need to be selected, then select 100 from the Records Per Page. If Select All Items is now clicked, all 80 items will be checked.

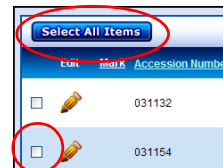
EZ Labels

Before posting the items, most librarians will print the necessary labels. EZ Labels allows for quick and easy label creation of the selected items using the EZ Label templates provided or templates that have been modified for your needs. EZ Labels is also available in other functions of Freedom such as Client Management and Library File.



To Print labels using EZ Labels:

1. From toolbar, Select the items using one of the following methods
 - Click the Check Box beside each item
 - Search for the items then click *Select All*
 - Select a large *Records Per Page* value to view all the items that need labels. In the above example, Select 50 Records Per Page would show all 40 items. Then, click *Select All*.



2. Click *EZ Labels*
3. Click *Barcode* or *Spine Label* as needed.
4. Select the desired template from the File drop down list.
5. Click *Print*.
6. Click *Current Page* & print onto plain paper.
7. Compare the print job with your label stock. If it is close enough, Click *Print All Pages* after loading label stock into the printer.



For more information on EZ Labels, please see “Modifying Easy Labels” on page 212 in the *L4U Users Manual*.

Posting to the Library File

When an item has been fully cataloged and is ready to be put into circulation, it must be posted to the Library File. To qualify for posting, an item must have a Status of Arrived and a unique Accession #. Also, it is now possible to post a subset of qualified items by selecting them before posting. Once the item is in the Library File, it can be searched and displayed in the iPAC. During the posting procedure, there are options available to assist with the continued maintenance of the records.



Note: A maximum of 2000 records can be posted at one time. If the current selection exceeds 2000, L4U will automatically subset a group of 2000 and post only those records.

To Post records from Acquisitions:

1. In iPAC, login to *Freedom*, see “L4U Freedom Login” on page 66
2. Click *Acquisitions*
3. Confirm that only the Items to be posted have a Status of Arrived, a Unique Accession # and are checked.

- Select the Items to post by clicking the check box. This allows to subset a range of qualified items.
4. Click *Post*
 5. Under *Advanced Features*, Select the applicable options. See *Advanced Features* below.
 6. Click *Post*
 7. Confirm that the number of records in the message box is correct
 - To exit without posting, Click *Cancel*
 8. A Confirmation Screen appears, Click *Return to Acquisitions Main Page* when finished.



Advanced Features

Change Entry Date to Today's Date

The Entry/Issue field will be updated with the current date for all posted records.

'X' the Records being Posted

This option Marks with an X all records in the Library File that have just been posted. This is a quick method of locating these new records in the Library File. The marks can be removed once they are no longer needed, see “Mark Item” on page 133 in the *L4U Users Manual*.

Delete All of the Posted Acquisition Records

When selected, L4U will delete all Acquisition records that have been successfully posted to the Library File. This option is recommended unless records are frequently reused.

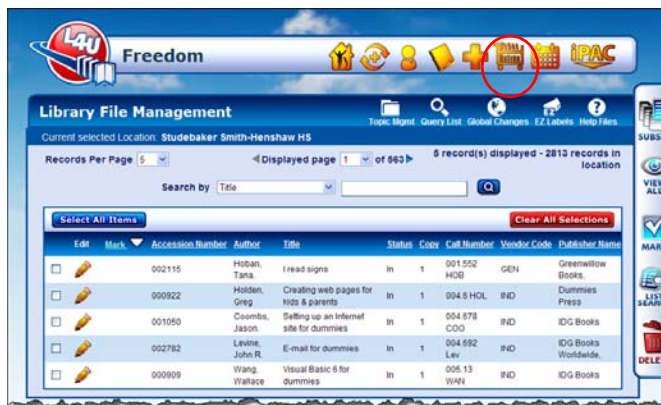
Delete Only Duplicate or Bad Accession Records

When chosen, this option deletes from Acquisitions only those records with a bad or missing Accession number.

Modifying the Library File

The Library File is a list of all items in the library collection that are currently available for circulation or have been at one time. While the Acquisitions and Library file appear very similar, there are important differences. The Library File:

- Is a place to store items that are viewed in the iPAC and can be circulated
- Allows records to be modified, excluding the Accession #
- Allows users to copy records back to the Acquisitions File for duplication



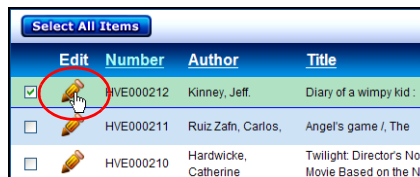
Navigating the Library File

Navigating the Library File or more specifically, navigating within the Library File, is the same as Acquisitions. In other words, the Dashboard controls for Save, Cancel, Previous or Next operate the same way as in Acquisitions. Please see “Navigating Freedom Acquisitions” on page 80.

Modifying Item Records

Item Records can be modified in both the Acquisitions File and the Library File. For more information on locating & modifying items in Acquisitions, please see page 101. Complete information on modifying records is covered in the Data Management chapter starting on page 111. To modify an Item Record (this example uses a record in the Library File):

1. From the *Freedom Toolbar*, click the *Library File* icon
2. Locate the item to be changed
3. Double Click the record or Click the Pencil icon
4. Make the necessary changes
5. Click *Save*
 - To exit the record without saving the changes, Click *Cancel*





Note: The Accession # cannot be changed in the Library File. The record must be copied back to Acquisitions, changed and re-posted. The old record should then be deleted.

Ratings and Resources

Rating

It may be desirable to clear an item's rating due to a variety of reasons. To do so:

1. Locate the item using Quick Search or any other means
2. Open the item by double clicking it or Click the pencil icon
3. Click the *Resources* icon in the Library File Management toolbar or scroll down to the Ratings section
4. Click *Clear*
5. Click *Save*
 - To exit the record without saving the changes, Click *Cancel*



Resources

Resources can include a variety of files, URL's or bookcovers. Resources are covered in more detail on page 92. However, if an item doesn't have a bookcover, L4U can search Amazon for a bookcover that matches the item's ISBN. To do so:

1. Locate the item using Quick Search or any other means
2. Open the item by double clicking it or Click the pencil icon
3. Verify the item has a valid ISBN10 or 13
 - If the ISBN is missing from the ISBN 1 field, L4U will attempt to find a bookcover with a combination of Title, Author and Publisher.
4. Click the *Resources* icon in the Library File Management toolbar or scroll down to the Resources section
5. Click *Search the Web for a Bookcover*



6. L4U will either:
 - *Find a Bookcover* Click Save to save the item with the new bookcover
 - *Find an Incorrect Bookcover* If the ISBN is correct but it is the wrong bookcover, either Click Cancel to discard this selection or try the suggestion for No Bookcover
 - *Find No Bookcover* Go to Amazon.com and perform a title search for the material. Copy the ISBN13 from the item's record and try that ISBN in the Library File record.
7. Click *Save* or *Cancel* as appropriate.

Copy

This button will push a copy of the record from the Library File into the Acquisition File. This feature is useful when an additional copy of an item that already exists in the Library File is acquired. The copy number for duplicated records will automatically be incremented when posting based upon the Title Authority file count for that title. The data entry for the item is minimal if the record is first copied to Acquisitions. To copy an item record to Acquisitions:

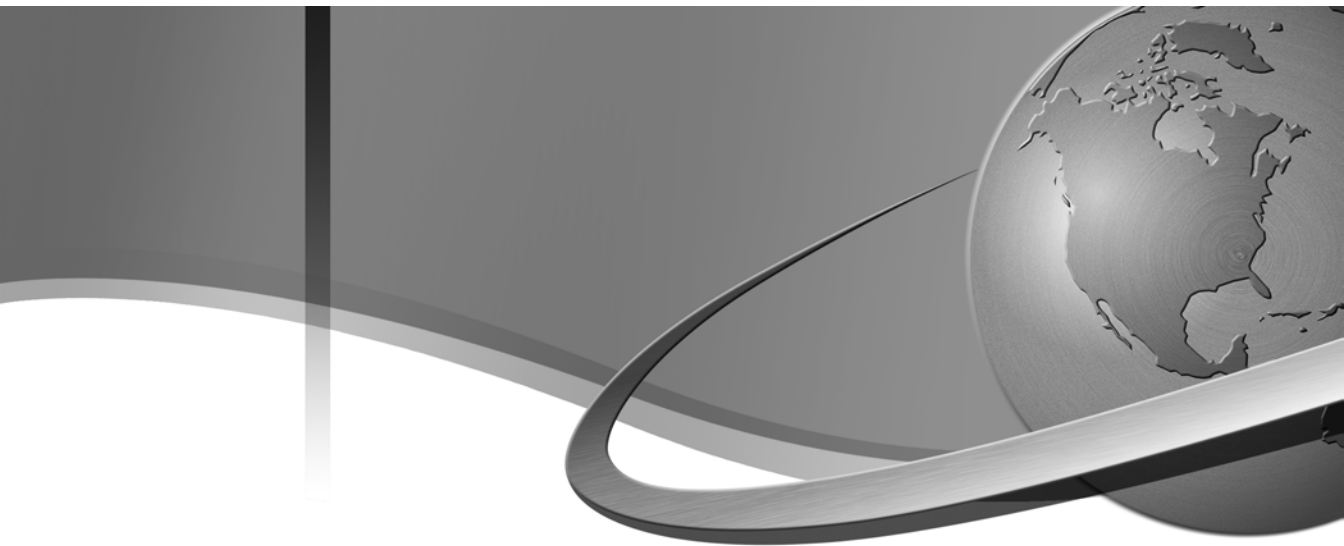


1. From the *Freedom Toolbar*, click the *Library File* icon
2. Locate the appropriate item
3. Double Click the record or Click the *Pencil*
4. Click *Copy*
5. Click *OK* at the confirmation dialog box
6. From the *Freedom Toolbar*, click the *Acquisitions* icon
7. Locate the newly created duplicate and *Open* it
8. If the *Status* is anything other than Arrived, change it to *Arrived*
9. Make any other changes as required
10. Click *Save*
 - The record is now ready to be posted.

EZ Labels in Library File

Labels can be printed from the Library File in addition to Acquisitions. Barcode labels for materials & Spine labels can easily be printed on a variety of label stock. Please refer to page 103 for more information on EZ Labels.





CHAPTER 5

DATA MANAGEMENT

- Working in list view
- Quick Search
- Subset or grouping records
- Marking items in a list
- Sorting items in a list
- Advanced Queries
- Saving, modifying and deleting Queries
- Topic Searches
- Global Changes

Overview of Data Management

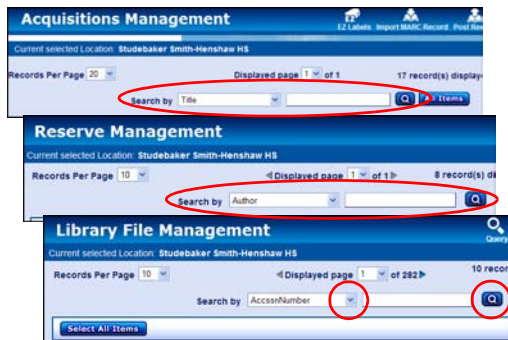
Data Management is the daily task of keeping the library information up to date. Updating acquisitions as orders come in or modifying materials in the shelf list are examples of data management. Each of the files in Freedom (e.g.: Library File, Acquisitions, Reserves, etc.), are displayed in a list view. Individual records may be located and modified.

Quick Search

Quick Search is the fastest and most convenient method of searching in L4U Freedom. The more characters that are typed, the more refined the search. Select the field that you want to search in. This allows you to quickly locate a record or group of records in a file. For more information on Advanced Query, please see “Query In Library File” on page 116.

To use Quick Search:

1. The search area displays the field that is the default field to be searched. To start searching on this field, simply Click into the search area and begin typing.
 - To change the field to search, Click the drop down icon and select the field from the drop down list.
2. Click the *Magnifying Glass* icon or press RETURN to start the search.
 - L4U performs a Starts With search. Use the @ symbol to execute a contains search. Example: @kit will find ‘Kites’ and ‘Fun in the Kitchen’. It may take longer for matches to display when using a *Contains* search.
3. The number of records matching the search criteria is shown as *records displayed*.



Note: The default field that L4U searches on is stored in the L4U Session as is any search results. Please see “Log Out” on page 77. Also, the Search will remember the results of your search until you click View All from the Sidebar. This allows you to move from one part of Freedom to another and retain the results of your search until they are not needed.

Quick Sort

Another method of quickly finding records in a file is through the use of the column sort feature. When in the list display of any file in L4U, you can temporarily sort the information displayed by the following method.

- To perform an ascending sort on a single column, Click the column heading
- To perform a descending sort on the same column, Click it again.

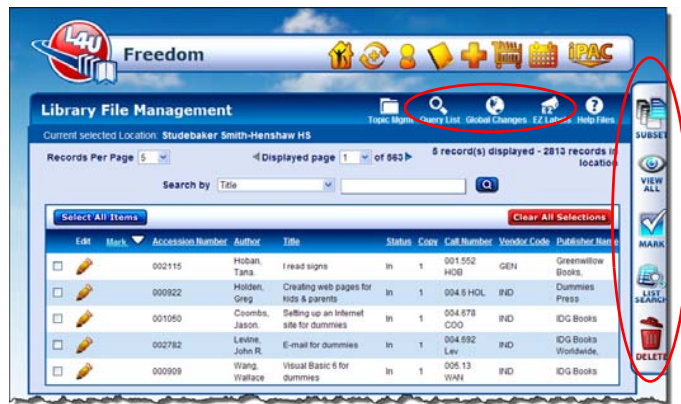
Select All Items							
Edit	Mark	Accession Number	Author	Title	Status	Copy	
<input type="checkbox"/>		011354	Cohen, Miriam.	"B Sort by this column"	In	1	
<input type="checkbox"/>		017825	West, Colin.	"Only joking!" laughed the lobster	In	1	
<input type="checkbox"/>		023811	Hutchins, Pat.	1 hunter	In	1	
<input type="checkbox"/>		025465	Greenspan, Bud.	100 greatest moments in Olympic history	In	1	

- The white triangle indicates the sort order.

The file is sorted and displayed by the information in the column selected. You can use this feature after doing a Quick Search or other Query, presenting the records matching your criteria in the order of your choice.

Data Management Tools

Although the majority of data management will take place in the Acquisition and Library files, the following actions or commands are common to most files in L4U.



View All

The first time any file is entered in the L4U program, the screen appears with the complete list of records displayed. At any time while working with different subsets, the complete list can be restored by Clicking *View All*. The list can then be viewed using the scroll bar or arrows to the right of the list.



Note: *View All* will use the *Records Per Page* to limit how many items appear on the web page.

Subset

When working with a list of records it is often beneficial to reduce the number of records being dealt with at any given time. Specific groups of records can be selected using the *Subset* button or the group of items can be the result of a query. Any records subset in this way then become the 'Current Selection', making them easier to view and work with.

Selecting Records

1. Click the check box beside the item(s) that need to be Subset.
2. To select all the items in the current subset or view, Click *Select All*.
3. Click *Subset*.



Note: *Select All* will select only the items in the current view. For example, if *Records Per Page* is set to 20 and there are 80 items in Acquisitions and all items need to be selected, then select 100 from the *Records Per Page*. If *Select All* is now clicked, all 80 items will be checked.

Mark Item

Marking is used for a variety of tasks where any number of items need a temporary mark for later identification. These tasks can involve subsetting dissimilar records and/or easy location of a group of records. To Mark an item(s):

1. *Subset* the items to be Marked or locate them using a Search or Query
2. Select the items to be Marked
3. Click *Mark*
4. Make the appropriate selection when prompted, *Do you wish to change highlighted records or your current selection?*
5. If an X is an acceptable Mark character, Click *Save*
 - If another character is preferable, Enter the Mark (up to two characters in length) in the field provided and Click *Save*

Select All Items		Clear All Selections						
Edit	Mark	Accession Number	Author	Title	Status	Copy	Call Number	Publisher Name
<input type="checkbox"/>	X	031225	Hoban, Russell.	Bread and jam for Frances	Out	1	FIC E HOB	HarperCollins.
<input checked="" type="checkbox"/>	X	031227	Brent, Lynette.	Acids and bases /	In	1	FIC BRE	Crabtree Publishing.
<input checked="" type="checkbox"/>	X	031228	Brent, Lynette.	States of matter /	Out	1	FIC 530.4 BRE	Crabtree Publishing Company.
<input checked="" type="checkbox"/>	X	031503	Lash, Christopher W.	Peterson first guide to insects of North America /	Out	1	FIC 595.70973 LEA	Houghton Mifflin.
<input checked="" type="checkbox"/>	X	031504	Burstein, John.	Remarkable respiratory system : The	In	1	FIC 612.2	Crabtree Pub.

6. Click *OK*
7. Click *OK* when the process is complete

UnMark Items

1. *Subset* the items to be Marked or locate them using a Search or Query
2. Select the items to be UnMarked
3. Click *Mark*

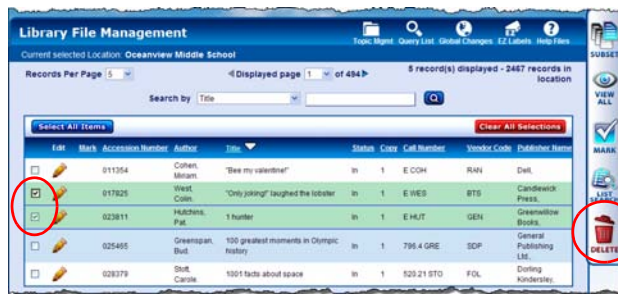
4. Make the appropriate selection when prompted, *Do you wish to change high-lighted records or your current selection?*
5. Delete the **X** in the *Enter New Value* field



6. Click *Save*
7. Click *OK*
8. Click *OK* when the process is complete

Delete

When materials, patrons or reserves records are no longer needed in the L4U data file, their records can be deleted.



To Delete records:

1. While in the appropriate file, Subset the records that need to be deleted
2. To select all the items in the current subset or view, Click *Select All*
3. Click *Delete*
4. A Confirmation screen appears. Double check the number of records to be Deleted and Click *OK*, or if the number of records is incorrect, Click *Cancel*
5. Click *OK* to confirm the deletion

List Search

Use List Search to produce subset lists of items by scanning in their barcodes. This is especially useful for creating a subset of disparate materials for marking, global changes or deleting.



Note: List Searches are a handy way to weed materials that are no longer needed. If you end up with a box full of items, List Search is much faster than deleting them one at a time.

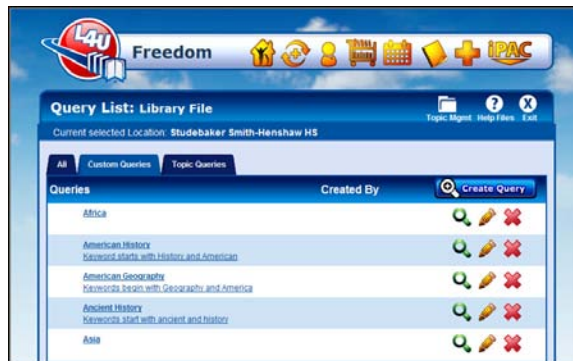
To Use List Searches:

1. While in the appropriate file, Click *List Search*
2. Click in the search field
3. Scan the barcodes of the items to be subset
 - Barcodes may also be entered manually. Use the RETURN key between entries.
4. Click *Search* to display a Subset of all items scanned.
 - Click *Close* to exit without displaying the subset.



Query In Library File

Although other modules in Freedom have a simple or *Quick Search* function, the Query in Library File has extra features and flexibility. The Library File Query is also known as Advanced Query as it allows the librarian to perform complex searches and save them for later use. These saved Queries can be used to help with weeding, inventory and other projects. Saved Queries can be used in Topic Searches, which are discussed in more detail in “Assigning a Saved Query to a Topic” on page 121.



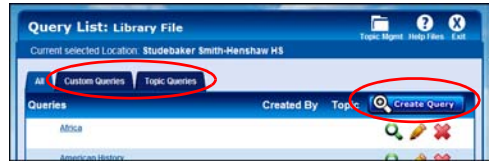
Creating and Saving Queries

Searches are built in the Query Editor using available fields and comparison statements. These searches may then be saved to the data file for easy access and regular use. Saved searches can be used by any location, but can only be edited by a user with the correct permissions for that location.

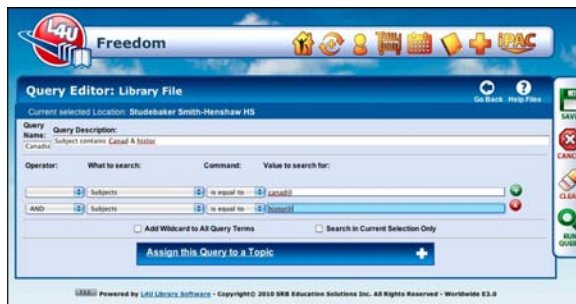
To create and save a Custom Query:

1. While in Freedom Library File, Click *Query List* from the *Library Management* toolbar
 - A list of saved *Custom Queries* and *Topic Queries* appears. Click the appropriate tab to show just those queries.

2. Click *Create Query*
 - The *Query Editor* appears. More information on the *Query Editor Options* is discussed below.
3. In the *Query Name* and *Query Description* field, Type in the desired information
4. In the *What to Search* drop down, Click on the field of choice
5. Click the comparison that is needed from the *Command* drop down
6. Click in the *Value to Search For*: and type in the search value
7. If additional criteria are needed, Click the *Green Plus* icon
8. In the *Operator* drop down list, Click on the boolean operator (*And*, *Or* or *Not*)
9. Repeat steps 4 to 7 until the complete Query is built
10. Select *Wildcard All Queries* and/or *Search Current Selection* if applicable
11. Click one of the following:
 - *Save* to Save the edits and return to the *Query List*
 - *Run Query* to open the resulting list in a new Library File window. Close this new Library File window when finished to return to the Query that was being edited/created. Edit the Query if the query results are not correct.
12. To exit without saving, Click *Cancel* or *Clear* to clear the edits and start again.
13. Click *Exit* from the *Query List* and return to the *Library File* window or click the *Library File* icon in the *Freedom* Toolbar



Query Editor Options



- *Query Name* and *Description*: This area contains the Query Name and Description for future reference.
- *What to search*: This drop down list on the left of the Query Editor contains a list of fields in the current file.
- *Search Commands*: This drop down list is located in the center of the Query Editor screen and contains all of the comparison statements.
- *Value to search for*: field: This is where the search value is entered. It is not case sensitive.

- **Boolean Operators:** These three options (*And*, *Or* and *Not*) are located at the beginning of each line of the Query Editor and are used to invoke Boolean logic between the search criteria.
- **Green Plus Icon and Red Delete Icon:** These buttons allow you to add or delete the various lines of the advanced search.
- **Wildcard All Queries:** When selected, L4U will automatically add the wildcard character to all of the Search Criteria.
- **Search Current Selection:** L4U will search the subset items only and not the entire file. In essence, a search within a search.



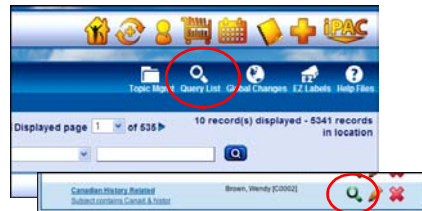
Note: The Command *Is Equal To* is a literal search. In other words, if CAT is entered, only items matching CAT - nothing more, nothing less will be found. Add the L4U wildcard, @, at the end of the search criteria to perform a Starts With search.

Using a Saved Query

Once a search has been saved, it displays in the *Query List* and can be used at any time.

To run a saved query:

1. While in the appropriate file, Click *Query List*
 - A list of all saved searches for the current file will display
2. Click the *Green Magnifying Glass* for the desired Query
 - The search results will display

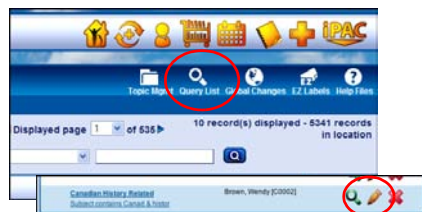


Modifying Saved Queries

Existing searches can be modified after they have been saved.

To modify an existing search:

1. While in the appropriate file, Click *Query List*
 - A list of all searches saved for the current file will display
2. Click the *Yellow Pencil* for the desired Query
3. Make the necessary changes or Click *Clear* to clear all edits for this query.
4. Click one of the following:
 - *Save* to Save the edits and return to the *Query List*



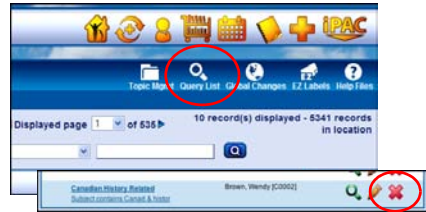
- *Run Query* to open the resulting list in a new Library File window. Close this new Library File window when finished to return to the Query that was being edited/created.
5. To exit without saving, Click *Cancel* or *Clear* to clear the edits and start again.

Deleting Saved Queries

If at any point a search is no longer necessary, it can be completely deleted.

To Delete a search:

1. While in the appropriate file, Click *Query*
 - A list of all searches saved for the current file will display
- Click the *Red X* for the desired Query
2. A confirmation dialog box appears, Click *OK* to delete or cancel.



L4U Freedom Query Editor Tips

The Query Editor allows you to perform very complex searches. Multi-Level Searches may be executed at one time, however, the search will become slower as more criteria are added. The fastest searches are, *is equal to* and *is not equal to*, and the slowest are *Contains* and *Does not Contain*.

Topic Management

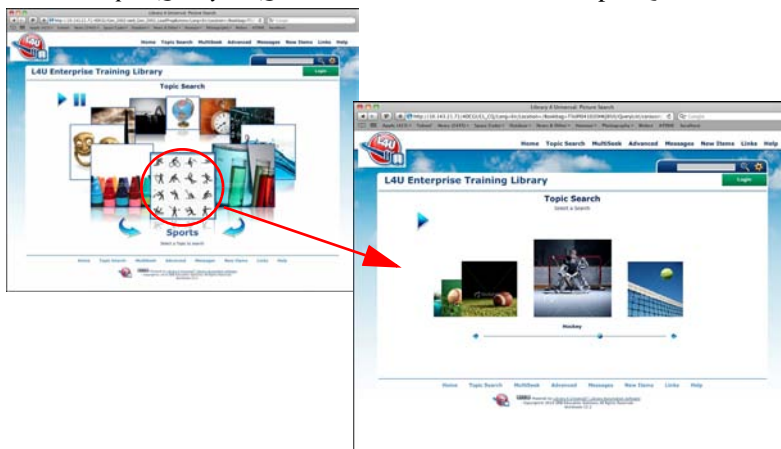
Topic Searches allow a librarian to easily build one button searches for their patron's needs. The Topic Searches are then available in the iPAC. For example, a librarian could create a series of searches for a reading assisted program that addresses a middle school curriculum requirements. The patron would then click a button that finds all these materials. This list would be dynamic. As materials enter circulation, or are

weeded out, the resulting list would update automatically. Also, the librarian can choose a picture that fits the nature of this Topic Search.



Creating a Topic Search is easy.

1. *Create a Topic:* Name the topic and assign a picture to it. In the above screen shot of the iPAC, Sports is the topic name and the chosen picture appears here in the Topic Search.
2. *Create a Topic Query or Queries:* Create one or more Topic Queries that appear



in the Topic. Topic Queries have a picture assigned to them which the patron clicks on to produce a list of results.

Create A Topic Search

Create a Topic and then create a Topic Query:

- While in Freedom Library File, Click *Topic Management* from the *Library Management* tool-bar
 - A list of previously saved *Topics* appears.
- Click *Create Topic*
- In the *Topic Name* and *Topic Description* field, Type in the desired information
 - The *Topic Name* will appear in the iPAC
- Click *Select a New Image*
- Click *Choose File*, navigate to the desired picture and click *Choose*
- Click *Upload File*
- Click *Create Topic Query*
 - Please see “Creating and Saving Queries” on page 116 for more information, but at Step 11, Select a image to associate with this Topic Search
- Once one *Topic Query* is created, Click one of the following from the Topic Editor window:
 - Save* to Save the edits and return to the *Topic Management* list
 - Click *Cancel* or *Clear* to clear the edits and start again.



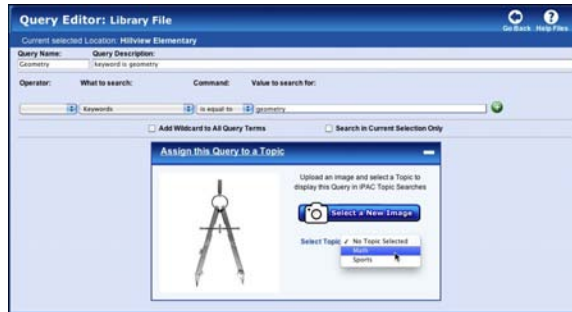
Note: Topic Search Images preferred size is 208 by 208 pixels. Preferred format is .png but transparent .gif files as well as .jpg will do. All images are internally converted to PNG or GIF and resized. L4U will accept practically any image size and format but large images will affect performance.

Assigning a Saved Query to a Topic

It is possible to assign a *Saved Query* to an existing topic or assign the query to a topic when creating the query. To do so:

- From the Query List, click the *Pencil* icon on the Saved Query or Create a Query, see page 116
- Click *Assign this Query to a Topic*

3. Click *Select a New Image* to assign a picture to this Search
4. Click *Choose File*, navigate to the desired picture and click *Choose*
5. Click *Upload File*
6. Select the *Topic* from the *Topic Name* drop down list

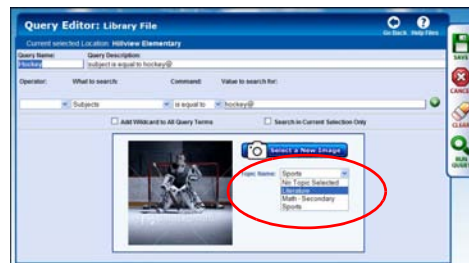


7. Click one of the following:
 - *Save* to Save the edits and return to the *Query List*
 - *Run Query* to open the resulting list in a new Library File window. Close this new Library File window when finished to return to the Query that was being edited/created. Edit the Query if the query results are not correct.
 - To exit without saving, Click *Cancel* or *Clear* to clear the edits and start again.
8. The *Query* is now assigned to the *Topic*
9. Click *Exit* to return to the *Library File*

Reassign a Topic Query to Another Topic

It is possible to assign a Topic Query to another Topic. To do so:

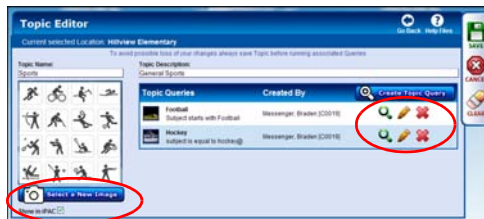
1. From Library File, Click *Query List*
 - A list of all searches saved for the current file will display
2. Click *Topic Queries*
3. Click the *Yellow Pencil* for the desired Topic Query
4. Select another *Topic* from the Topic dropdown list
5. Click *Save* to Save the edits and return to the *Query List*



Editing Topics

Sometimes it is necessary to edit a Topic for clarity or another image is desired for the Topic. To do so:

- From *Library File*, Click *Topic Mgmt*
 - A list of all Topics saved for the current file will display
- Click the *Yellow Pencil* for the desired Topic
- Select one of the following tasks:
 - Assign a new image to the *Topic* by Clicking *Select a New Image*
 - Uncheck *Show in iPAC* to hide the Topic in the iPAC
 - Topic Queries can be checked for proper results via the *Green Magnifying Glass* and then Edited if necessary via the *Yellow Pencil Icon* or Deleted via the *Red X*
 - Click *Clear* to clear the *Topic Name* and *Description*
- When finished, Click *Save* to save the changes or *Cancel* to discard the changes



Deleting Topics

If a Topic is no longer needed, it can be deleted. Hiding a Topic is an alternative to deleting a Topic, see *Editing Topics* above. To do so:

- From *Library File*, Click *Topic Mgmt*
 - A list of all Topics saved for the current file will display
- Click the *Red X* for the desired Topic
- Click *OK* to Delete
 - Any Topic Queries assigned to this Topic are not deleted and become Saved Queries
- Click *Save*
- Click *Exit* to return to *Library File*



Globals

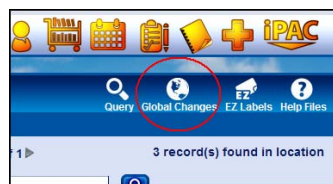
Globals permits large scale changes to the current file. *Globals* should be used when modifying a specific field in a large number of records. The field will be updated in all the currently selected records, or only the records currently highlighted. This may mean adding a subject to 5 items, or updating the Replacement Value to 75 items.



Warning: This is a very powerful and time saving feature. Use caution when making any type of Global Change. Global Changes cannot be “undone”. Although it is not required, we recommend that a Subset be created of the records to be changed before performing the Global Change. It is highly advised to ensure that you have a current backup of your data before performing Global Changes.

Performing a Global Change

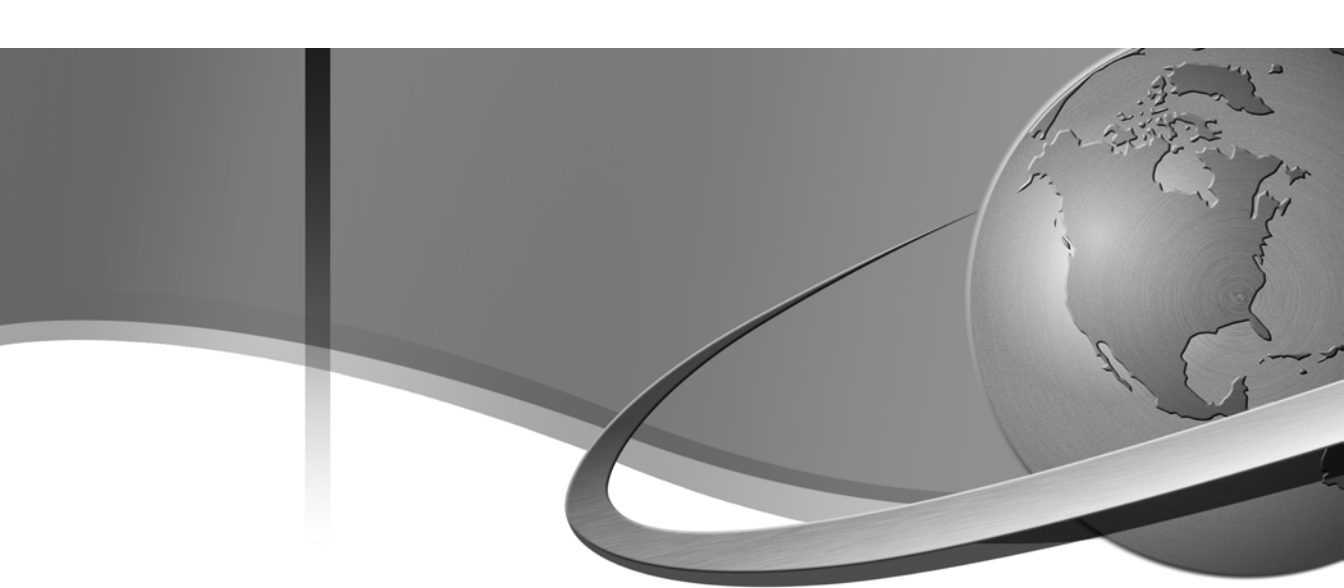
1. Subset or Highlight the records to be changed
2. Click *Global Changes*
3. If records were highlighted but not Subset, a confirmation screen appears. Select either *Current Selection of X* or the *Only X Highlighted records*
4. Click the radio button to the left of the field to be changed
 - Any changes made to the *Loan Type* or *Dewey* will prompt the request to update the Call Number. By clicking *OK*, L4U will reconstruct the Call Number using the Loan Type, Dewey and Cutter. If any of these fields are blank or incorrectly entered, the Call numbers will not update properly. Use



- this feature only if the individual records are complete and correct, otherwise, Click *No*.
5. In the *New Contents* field, Enter the new value
 - If *Status* is selected, a pop up list appears. Click the value to use and Click *OK*.
 6. Click *Update*
 - To return to the current file without making any changes, Click *Exit*
 7. A Confirmation screen appears. Double Check the number of records being changed and Click *OK*.
 - If the record total is incorrect, Click *No*
 8. An additional Request screen may appear depending on the field being changed
 - *Do you wish Entry Date updated to Today's Date?*, Click *OK* to make the change or *No* to leave the *Entry Date* as is.
 9. A confirmation dialog box appears.



Warning: Using the option to automatically update local call number is a very useful tool; however, if used when data fields are incomplete or contain conflicting data, local call numbers will be lost.



CHAPTER 6

CLIENT ADMIN

- Creating Patron records on the Web
- Union Catalog Considerations
- Modifying Patrons
- Search for Patrons
- Print Patron Barcodes

Freedom Client Management

L4U Freedom users enjoy the benefit of creating and modifying Patrons from the Web. Items Out and Histories (if enabled in Preferences), can be viewed as well. Control over what Freedom features are available to a user is specified in the user's Homeroom, see "Setting Web Privileges" on page 27 and is controlled by the District Librarian.

L4U Freedom

Client File Management

Current selected Location: **Studebaker Smith-Henshaw HS**

Client Code: Homeroom:

First Name: Last Name:

Type: Fines/Points Total:

Total Items Out Now:

Client Information **Items Out** **Fines History** **Histories**

Client Information

Address:

Telephone Number: Circ. Override Days:

Maximum: Grad Year:

Suspended: Yes ☐ No ☒ Total Out This Year:

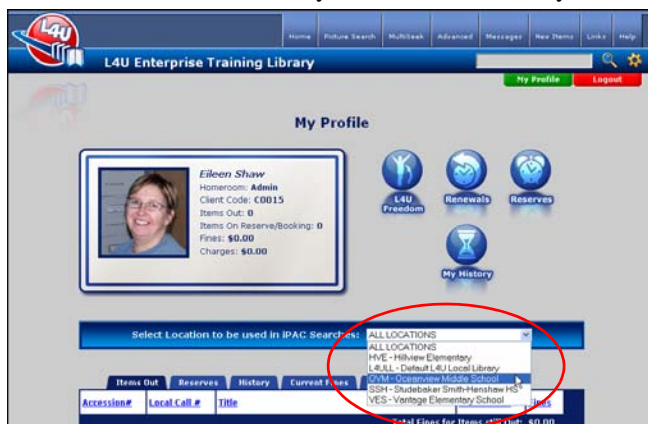
Total Active Fines:

SAVE **CANCEL** **NEXT** **PREV**

Union Catalog Considerations with L4U Enterprise

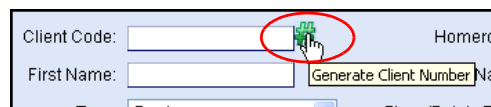
A Union catalogue is the combined holdings of two or more libraries or collections. If the library administrator allows you to work or edit in more than one collection, L4U needs to know which collection your administrative tasks will affect. If so, Select a

location from the drop down list before performing Freedom administrative tasks. If the drop down list is not available, then you have access to only one collection.



To Create a Patron

1. In iPAC, login to *Freedom*, see “L4U Freedom Login” on page 66.
2. Click *Circulation* or *Client Management*
3. Click *Add New Client*
4. In the fields provided, Enter the appropriate information. Mandatory fields include:
 - Client Code, must be unique and is either supplied by the local school office/district board office or the librarian can create a temporary client barcode by clicking the # icon.
 - Last Name
 - Homeroom
5. Click *Save*
6. Repeat steps 4 and 5 until all patrons have been entered
7. Click *Cancel* to return to *Client Management*



Note: The most efficient way to enter Patrons is to import them from an ASCII text file. Please contact your District Librarian to obtain Class Lists for your campus/location or refer to the *Importing/Exporting* chapter in the *L4U Users Manual*.

Patron Information

Client Information contains basic patron information. It includes several fields that are entered by the user and others that L4U generates automatically. Some of these fields are self-explanatory, where others require some explanation. They are:

Client Information	
Address: #400 - 1632 Dickson Ave, Kelowna, BC V1Y 7T2	Circ. Override Days: 90
Telephone Number: 1-800-667-3634	Grad Year: 0
Maximum: 30	Suspended: Yes <input type="radio"/> No <input checked="" type="radio"/>
Grade Level: 0	Total Out This Year: 7
Social Insurance #:	Total Active Fines: 47
Birthdate: 1/19/1939	Fines/Points Total: 20.25
	Other Charges Total: 0
	Card Expiry Date: 00/00/00

Maximum

The *Maximum* field is for the maximum number of items that a patron may borrow at one time. This value must be greater than zero in order for a patron to circulate library items.

Suspended

This feature can be used to temporarily suspend Patrons from circulating library items. If *Yes* is selected and the Patron attempts to borrow an item, a warning message appears on the circulation station.

Fines/Points

The various fines/points fields are automatically generated by L4U and are non-editable fields. The *Total Active Fines* is the amount owing on items currently overdue and not yet returned. Whereas the *Fines/Points Total* is the current balance owing on previously accumulated fines for items that have been returned.

Other Charges

The *Other Charges Total* is only displayed in this field. The itemized charges can be entered from circulation or in the *Other Charges* tab, see “Total Charges” on page 150.

Type

Type is a user defined field for identifying Patron categories. This field utilizes a pop up list for entering the value. Example: *Teacher* vs. *Student*.

Circ. Override (days)

A Patron’s *Circulation Override* value will take precedence over the *Loan Period* for the *Loan Type Code* when circulating materials. This setting is useful for Patrons who require set circulation periods that usually exceed a normal Loan Type period. For Example: If a Patron with a Circ Override of

10 days checks out a book with a Loan Type Code set to 7 days, the due date will be 10 days from the date taken out.

Totals

Total Out this Year and *Total Items Out Now* are L4U generated circulation counts that can be viewed only.

Additional Info

Additional Information

Pin: Network Username:

Alternate Phone: E-mail Address:

Gender: Drivers License #:

Message:

Parents Name: Entry Date: (mm/dd/yyyy)

Mother's Name: Mother's Phone:

Father's Name: Father's Phone:

Guardian's Name: Guardian's Phone:

Notes:

The *Additional Info* tab contains contact information for the patron. As well, it is where the PIN (Personal Identification Number) is entered. A PIN has to be entered if the patron wants to log into L4U. An email address is necessary to send Overdue Notices and Bookbag lists. Any information entered in the *Message* field will be displayed in Circulation. The Network Username is only necessary when Active Directory integration is enabled in Preferences. For more information on Active Directory integration, see “Active Directory Integration” on page 54 in the *L4U Users Manual*.

Items Out

Items Out							
Accession #	Local Call #	Title	Due Date	Fines			
000455	730 MAC	Haida art	4/22/2009	\$39.20			
001393	TR 306 ROD	Culture smart!	4/22/2009	\$39.20			
001395	TR 372.5 REU	Complete art curriculum activities kit	4/22/2009	\$39.20			
Return to the top							
Fines History							
Accession #	F/C	Title/Description	Charge Date	Fine/Charge	Amount Paid	Status	Paid/Waived

Items Out is a list of all items the patron is currently borrowing from the library. Items listed in red are overdue.

Fines History

If the library administrator has enabled *Fines History*, then a list of incurred fines & other charges will be displayed. It contains details of all payments made on fines and other charges including partial payments and waived fines. This is very useful for audit trail purposes.



Note: To add Other Charges such as photocopying or lost materials or Manage Fines, please see “Total Charges” on page 150.

Histories

Client circulation history is displayed here. *Histories* are only available when histories have been enabled in Preferences. Please see “Item/Client Histories” on page 39 in the *L4U Users Manual*.

To Modify a Patron

1. In iPAC, login to *Freedom*, see “L4U Freedom Login” on page 66.
2. Do one of the following:
 - Select *Circulation*
 - Locate the patron
 - Click *Modify Client*

Patron

Name: Katie Stabb
 Code: C0174
 Homeroom: Studebaker Smith-Henshaw
 Sec Grade 10's
 Homeroom Code: SSH10
 Items Out / Max: 1/10
 Override Days: 0
 Total for Year: 1
 Total Fines: \$0.00
 Other Charges: \$0.00

Modify Client

OR

3. Select *Client Management*
 - Locate the desired patron
 - Click the *Client Code* link to open the desired patron
4. In the fields provided, Enter or Edit the appropriate information. Mandatory fields include:
 - *Client Code*, must be unique and may need to begin with the designated prefix. Client Code prefix is discussed in more detail in “To Create a Patron” on page 129,
 - *Last Name*
 - *Homeroom*
5. Click *Save* to save the edits, otherwise click *Cancel* to discard

Client File Management

Search

Client Code: c017 First Name: Last Name:

1 of 48 records are found

Add New Client Show All Clients

Client Code	Last Name	First Name	Homeroom
C0174	Stabb	Katie	Brown



Note: Use the Client Information, Items Out, Fines History & Histories buttons to quickly navigate the Patron information.

Searching for Patrons

To locate a patron from the Client File Management window:

1. In iPAC, login to *Freedom*, see “L4U Freedom Login” on page 66.
2. Select *Client Management*
3. Do one of the following:
 - Scan or manually enter the patron barcode or a portion of the patron barcode in the Client Code field
 - Type the first few letters of the patron’s first or last name in the respective fields
 - Type the first few letters of the desired homeroom in the Homeroom field
4. Click the *Magnifying Glass* icon
5. Click the *Client Code* link to open the desired patron

Client File Management

Search

Client Code: First Name: Last Name: mess Homeroom: [Q]

3 of 40 records are found

Add New Client Show All Clients Delete Selected Clients

Client Code	Last Name	First Name	Homeroom	# Out	Max	Fines/Points
<input type="checkbox"/> C0143	Messenger	Kylan	Force	3	10	0.00
<input type="checkbox"/> C0001	Messenger	Dawn	HSL	0	25	0.00
<input type="checkbox"/> C0019	Messenger	Braden	LAS	0	25	0.00

Records Per Page: 100 Page 1 Jump to Page # Go

Patrons can also be entered into the L4U program in other ways. The most efficient way to enter patrons is to import them from an ASCII text Tab delimited file. For instructions on this procedure, see “Import Client Data” on page 332 in the *L4U Users Manual*.

EZ Labels in Client File

Patron Barcode Labels can be printed from the Client File. The Patron Picture, if any, will appear on the label. The process for selecting patrons, printing and minor modifi-

cations to the template are similar to the process in Acquisitions. Please refer to page 103 for more information on EZ Labels.

Client File Management
Current selected Location: Hillview Elementary

Search

Client Code: First Name: Last Name: Homeroom: [Q]

21 of 21 records are found

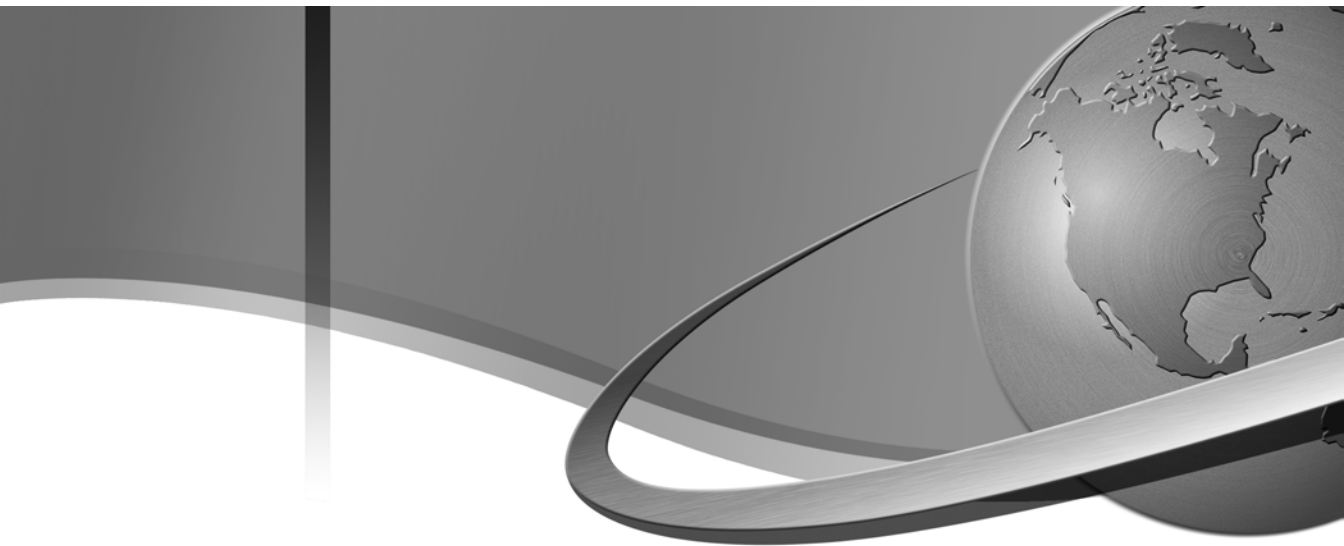
Add New Client Show All Clients Delete Selected Clients

Client Code	Last Name	First Name	Homeroom	# Out	Max	Fines/Points	Location
<input checked="" type="checkbox"/> 00017	Halverson	Joyce	HV/Staff	0	25	0.00	ALL
<input checked="" type="checkbox"/> 00011	Prior	Stan	HV/Staff	4	25	0.00	ALL
<input type="checkbox"/> CH01PAC	Search	IPAC	HV/Staff	0	1	0.00	ALL

2: Hillview Elementary

Homerooms

Homerooms are any division or group of patrons. This can mean homerooms in a school, schools within a district or even individual groups within an organization. Homerooms are used to track patrons, for Overdue reporting and to determine Web Privileges for patrons. Please see “Homerooms” on page 62 in the *L4U Users Manual* for more information on Creating or modifying Homerooms.



CHAPTER 7

CIRCULATION

- Freedom Circulation
- Enabling Freedom Circulation
- Checking an Item Out
- Checking an Item In
- Locating Patron's and Items
- Circulation Options
- Items Out for a Patron
- Dealing with Lost Materials
- Renew Items
- Placing Reserves
- Fine Payments
- Circulation Alerts
- Circulation Period Hierarchy

L4U Freedom Circulation

L4U Freedom users have the ability to perform full (*Freedom*) circulation on the web as well as limited (*Basic*) circulation. Essentially, all the functionality of L4U Administration Circulation is available in L4U Freedom. This allows libraries to use any browser equipped computer as a circulation station. Please see “Basic Circulation on the Web” on page 73 for more information on Basic Circulation.

Most of a library's daily activities take place within Circulation. The Circulation screen is used to enter library transactions such as checking items in and out, renewing items currently circulating, processing fine payments and updating or entering patrons. L4U automatically updates the status of both the client file and the library file every time a circulation takes place.

This is a powerful tool allowing users to circulate items from any web browser in the world. Administrators may choose not to allow this type of functionality or perhaps allow it for only specific users. Since Freedom Circulation is enabled for individual homerooms, access to its functionality can be restricted to authorized users.

Enabling Freedom Circulation

The options for Freedom Circulation is set in the Web Privileges of the individual homeroom records. Please see “Setting Web Privileges” on page 27 for more information. Also, Freedom Circulation on the Web is governed by the same *Circulation Setting and Defaults* in Preferences as is L4U Administration Circulation. Please see “Circulation Settings” on page 41 in the L4U User Manual.

Circulation in a Union Catalog with L4U Enterprise

A Union catalogue is the combined holdings of two or more libraries or collections. If the library administrator allows you to work or edit in more than one collection, L4U needs to know which collection your administrative tasks will affect. If so, Select a location from the drop down list before performing Freedom administrative tasks. If the drop down list is not available, then you have access to only one collection.



Checking an Item Out

L4U needs a patron entered in Circulation first, then you can circulate materials to that patron.

1. In iPAC, login to *Freedom*, see “L4U Freedom Login” on page 66.
2. Click *Circulation*
3. Do one of the following to enter the Patron:

The screenshot shows the top of the Circulation interface. The title bar says "Circulation". Below it, the current selected location is "Studebaker Smith-Henshaw HS". The mode is set to "Auto". There is a search icon circled in red in the toolbar. Below the toolbar, there is a field labeled "Enter Barcode Here" with a blue "Enter" button and a red "Clear" button. Below this, there are two input fields labeled "Patron" and "Item".

- Scan or manually enter the patron barcode in the *Enter Barcode Here* field and Click *Enter*
 - Locate the patron using the Search button in the Circulation Toolbar, see “Using the Search Icon to find Patrons” on page 139 for more information
4. Do one of the following to Circulate the materials:
 - Scan or manually enter the item barcode in the *Enter Barcode Here* field and Click *Enter*
 - Locate the item using the Search button, see “Using the Search Icon to find Items” on page 139 for more information
 5. The status will display *Outgoing*
 - The item has now been checked Out

The screenshot shows the Circulation interface after an item has been checked out. The title bar says "Circulation". Below it, the current selected location is "Studebaker Smith-Henshaw HS". The mode is set to "Auto". There is a green "OUTGOING" status icon circled in red. Below the toolbar, there is a field labeled "Enter Barcode Here" with the value "002115" and a blue "Enter" button and a red "Clear" button. Below this, there are two input fields labeled "Patron" and "Item". The "Patron" field shows a photo of a woman and the following details: Name: Alicia Bell, Code: C0031, Homeroom: Studebaker Smith-Henshaw Sec, Grade: 10's, Homeroom Code: S5H10, Home Out / Max: 1/10, Override Days: 0, Total for Year: 2, Total Fines: \$0.00, Other Charges: \$0.00. The "Item" field shows a photo of a book and the following details: Title: The Outsiders, Author: S.E. Hinton, Accession #: 002115, Local Call #: 001.552 H08, Due Date: 6/28/2010.



Note: If one patron is circulating multiple items, it is not necessary to re-scan the patron code each time. Simply continue scanning or entering the item barcodes or titles. Those items will continue to be checked out to the same patron until a new patron barcode number or name is entered.

Checking an Item In

Those Items with a status of Out can be circulated into the library without entering a Patron Code.

1. In iPAC, login to *Freedom*, see “L4U Freedom Login” on page 66.
2. Click *Circulation*
3. Do one of the following:
 - Scan or manually enter the item barcode in the *Enter Barcode Here* field and Click *Enter*
 - Locate the item using the Search button, see “Using the Search Icon to find Items” on page 139 for more information.
4. The patron that last borrowed the item will appear, and the status will display *Incoming*
 - The item is now checked In

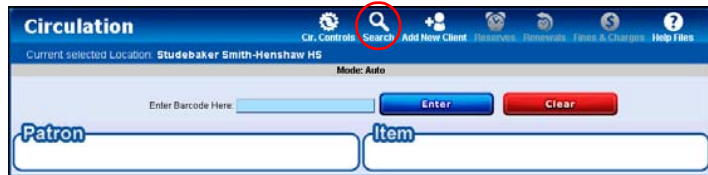
The screenshot shows the L4U Circulation interface. At the top, there's a navigation bar with icons for 'Circulation', 'Search', 'Add New Client', 'Reserves', 'Renewals', 'Fines and Charges', and 'Help Files'. Below this, it says 'Current selected Location: Studebaker Smith-Henshaw HS' and 'Mode: Auto'. In the center, there's a large green arrow pointing down over a book icon, with the word 'INCOMING' in a green box below it. To the right of this is a text field 'Enter Barcode Here:' containing 'SSH00102', and two buttons: 'Enter' (blue) and 'Clear' (red). Below the main area, there are two panels: 'Patron' and 'Item'. The 'Patron' panel shows a photo of Greg Coyle and his details: Name: Greg Coyle, Code: C0012, Homeroom: Studebaker Smith-Henshaw Sec Staff, Homeroom Code: SSH1staff, Items Out: 1 Mar. 3/25, Override Days: 0, Total for Year: 4, Total Fines: \$87.60, Other Charges: \$0.00. The 'Item' panel shows a book cover for 'The Macintosh Way' and its details: Title: Macintosh way, The, Accession #: SSH00102, Local Call #: 338.7 KAW, Type: SSH NF - Studebaker Smith Henshaw Non Fiction, Circ. (days/min): 21, Status: In, Charge/day: \$0.10, Return On: Mon, Jun 28, 2010, Days Out: 0, Location: Studebaker Smith Henshaw HS.

Locating Patrons and Items

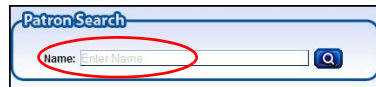
L4U offers several means of locating Patrons and Items while in Freedom Circulation. The most efficient method is the use of barcodes. Enter the barcode by either manually typing it in, or by using a scanner, and L4U will display either the Patron information or the Item information. Occasionally barcodes can become damaged and unreadable. In this situation alternative ways of locating Patrons or Items can be used.

Using the Search Icon to find Patrons

The Freedom Circulation Toolbar contains several icons, one of which is Search. Clicking this icon reveals two search areas: *Patron Search* and *Title Search* with data entry fields. Entering partial information in one of these fields and Clicking the Query Icon beside it will provide a list of records to choose from. To use the Query Icon to locate a Patron:



1. Click the *Search* button
2. Click into the *Name* field
3. Enter the first several letters of the first or last name.
 - The more letters entered the more specific the search will become
4. Click the *Query Icon* beside the field containing the search criteria
 - Alternatively, press the ENTER key on the keyboard to start the search



Patron Search		Title Search		
Name: mess		Title:		
Last Name Search on criteria 'mess' produced 3 results <small>Click on a link to load that client.</small>				
Client Code	Client First Name	Client Last name	Homeroom	Type
C0019	Braden	Messenger	Staff	Teacher
C0001	Dawn	Messenger	Staff	Teacher
C0119	Kylan	Messenger	Force	Kindergarten

5. From the results displayed, Click the desired patron
6. That Patron is entered into Circulation

Using the Search Icon to find Items

A *Query Icon* is also available for title. Items can be reserved or circulated from the resulting list of found materials.

1. Click the Search button
2. Enter the first several letters of the title (do not use articles) into the *Title* field.
 - L4U performs a *Starts With* search, ie: Search on *cat* produces Cat, Cats, Cat-a-clysm, etc.
 - Start the search criteria with the L4U Wildcard: @ to perform a *Contains* search, ie: Search on @*cat* produces Captain Cat, My Family Vacation, etc
3. Click the *Query Icon* beside the *Title* field
4. From the list of titles displayed, Either
 - Click the correct title to circulate the item *Out* or *In*. Multiple copies of an item appear separately

- Click the Reserve button to place a hold for that Title. Items with a Status of In can be reserved as well.

Patron Search **Title Search**

Name:

Title:

Title Search produced 7 results

Click any item links below to immediately Circulate that item. Items that are not links can not be circulated at this time.

Title	Accession #	Call #	Status	
Flying	023442	E CRE	In	<input type="button" value="Reserve"/>
Flying ace	003626	E BUL	Out	<input type="button" value="Reserve"/>
Flying dragon room The	027801	E WOO	In	<input type="button" value="Reserve"/>
Flying for fun	002985	629.13 HAN	In	<input type="button" value="Reserve"/>
Flying high	027257	PB DAL	In	<input type="button" value="Reserve"/>
Flying machine	013141	629.133 NAH	In	<input type="button" value="Reserve"/>
Flying Squirrel at Acorn Place With Plus Squirrel	001523	E WIN	In	<input type="button" value="Reserve"/>

Circulation Options

Within the Freedom Circulation screen, there are various control functions that can be easily accessed. Many of these functions are also controlled in Preferences. For more information on the Circulation Settings in Preferences, see “Circulation Controls” on page 141. The Preference settings control the defaults, whereas the *Circulation Controls* control the activity taking place for that current session. These special functions include activities such as Status Checks on library items and Fine notifications.

Circulation Modes

L4U defaults to *Auto* Circulation. This means that items can be checked In and Out at any time. During the course of library operation, it may become necessary to do a large number of returns or circulations. By selecting *Incoming Only*, items can now only be checked In. This is helpful for catching items that have been placed in the return bin without ever having been checked out. By selecting *Outgoing Only*, L4U will now only allow items with a status of In to be checked Out to a patron. This can be helpful for processing large groups of Patrons. To return to *Auto* Circulation, select *Auto Mode*.

Auto Mode in summary:

- If the Item has a status of *Out* when scanned, L4U will circulate the Item in
- If the Item has a status of *In* when scanned, L4U will circulate that Item to the currently entered Patron. If no Patron is entered, L4U will visually alert the circ operator that a Patron is first needed to circulate materials



Note: L4U's Circulation beeps help with circulation so ensure your computer speakers are connected and turned on.



To change the *Circulation Mode*:

1. Select a circulation mode from the *Circulation Mode* toolbar
 - The icon changes color to indicate this is now the current mode

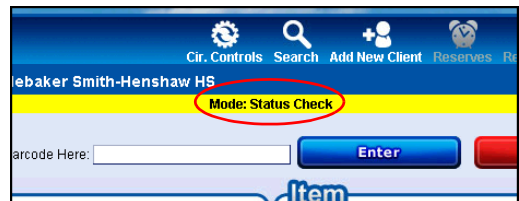


Note: When in *Out Only* mode, L4U will alert the circulation operator if materials have been swapped between users. For example, if a patron has materials that are Out to another Patron, L4U will ask the operator if they want this material to circulate to the patron, bypassing the step of manually circulating that item in first.

Normal Circulation versus Status Check

By default, L4U automatically circulates items both in and out. This is called Auto Mode. The Status of an item can be verified without actually circulating the item out or in. To check the Status of an item:

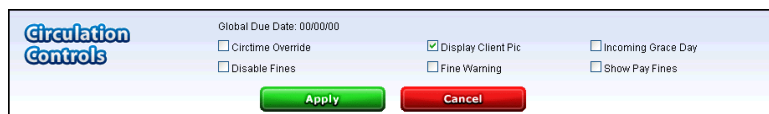
1. From within *Circulation*, Click *Status Check* from the *Circ Mode* toolbar
 - The *Mode* is now changed to *Status Check*
2. Scan or manually enter the item to be checked and Click *Enter*
 - The item's Status and circulation information will be displayed.
 - These steps can be repeated for as many items as necessary
3. To return to normal circulation, Select *Auto Mode* from the *Circ Mode* toolbar
 - The *Mode* will change to *Auto* and normal Circulation will resume



Circulation Controls

In addition to the default settings that exist in Preferences, a number of the Circulation options can be changed directly from the Freedom Circulation screen. To modify these settings:

1. From the Freedom Circulation Screen, Click *Circulation Controls*
2. Select the preferred options
 - See definitions below
3. Click *Apply*





Warning: Any changes to modes or circulation controls do not take effect unless the *Apply* button is clicked.

Circetime Override

By selecting *Circetime Override*, an alternate circulation period can be designated when checking an item Out. Before the item is circulated, the new Due Date or Loan Period must be entered in the *Circetime Override* field. The field will only be displayed if *Circetime Override* is selected. The value entered will override all other loan periods excluding the Global Due date. A setting within Global or Location Preferences will determine whether L4U requests a specific due date or the number of circulation days. To enable this setting, the *Circetime Override* needs only to be set once in Freedom Circulation. All subsequent circulations will use this setting as long as the user remains logged in.

Display Client Picture

When the *Display Client Picture* option is selected, Circulation will display the Patron photo every time the Patron Code has been entered, and any time an item is returned by that Patron. The Patron picture must exist in the Client File for this feature to function.

Incoming Grace Day

When *Incoming Grace Day* is activated, L4U allows an item to be one day overdue without accruing fines. This feature is useful for libraries that have night drop boxes for returned items, or only check items In on specific days.

Disable Fines

When selected, Fines that would ordinarily be charged for items returned will not be charged to the Patron. Fines will not be charged as long as *Disable Fines* is selected.

Fine Warning On

When selected, *Fine Warning On* alerts the librarian to existing Fines conditions or outstanding Fines. The operator can then allow or disallow additional circulations. For more information on Fines and Fine Payment, “Fine Payments” on page 148.

Show “Pay Fines”

If this option is selected, L4U will automatically display a payment message for any item that is checked in and has accrued a fine. Fine payments are then

processed by clicking the *Fines and Charges* tab. For more information, “Fine Payments” on page 148.

Items Out for a Patron

L4U provides a list of currently circulating items in a quick, at-a-glance format. Anytime a Patron is entered in Freedom Circulation, a list of Current Items Out is displayed on the Freedom Circulation screen. These items are color coded for convenience. Printing from this window produces a printer friendly page.

OUTGOING

Enter Barcode Here: 001526 [Enter] [Clear]

Patron

Name: Greg Coyle
Code: C0012
Homeroom: Studebaker Smith-Henshaw Sec Staff
Homeroom Code: SSistaff
Items Out / Max: 5/25
Override Days: 0
Total for Year: 6
Total Fines: \$07.60
Other Charges: \$0.00

Item

Items Out

- Hockey Hero** (Blue)
Accession #: 001350
Local Call #: E MAR
Due Date: 6/14/2010
- Hockey** (Blue)
Accession #: 000666
Local Call #: 79LBN2 WAR
Due Date: 6/26/2010
- Haida art** (Black)
Accession #: 000455
Local Call #: 730 MAC
Due Date: 4/22/2009
- Culture smart!** (Black)
Accession #: 001393
Local Call #: TR 306 ROD
Due Date: 4/22/2009
- Complete art curriculum activities kit** (Red)
Accession #: 001395
Local Call #: TR 322.5 REH
Due Date: 4/22/2009

The item just circulated to the patron is listed in Blue; Items listed in Black are items currently circulating, but are not overdue and Items listed in Red are Overdue.

From this screen it is easy to get *Information* on the Item and *Renew* the Item.

Item Information

Clicking on the *Info* button will reveal more information on the Item currently circulating. Author, cost of the material and other useful information for the forgetful patron is readily available.

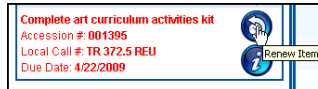
Culture smart!
Accession #: 001393
Local Call #: TR 306 ROD
Due Date: 4/22/2009

e smart!
Accession #: 001393
Local Call #: TR 306 ROD
Due Date: 4/22/2009

Author: Rodriguez, Susan, ,
Cost: \$0
RV: \$0
Level: Intermediate
Pages: xxiv, 382 p. :
Publisher: Prentice-Hall,
Pub. Year: c1999.
Location: Studebaker Smith-Henshaw
Secondary

One Click Renewal

To quickly Renew an item, Click on the Renew icon. The item is renewed using the current settings for the Item and Patron. More information on Renewing Items is covered below.



Note: A Printer Friendly version of this page is available using the Web Browser's Print function.



Lost Items

Items that are known to be missing should be marked with a status of Lost. If a patron has misplaced an item you will need to adjust the status of the item and make it unavailable for future circulation.

To change the status of an item to lost:

1. Locate the Patron with the lost item
2. Click the *Info* button for the lost item
3. Click *Mark As Lost*
4. Select one of the available options:
 - *No Charge* The patron will not be billed
 - *Charge* If the item does not have a Replacement Value, then enter the amount due
 - *Charge RV L4U* will bill the patron the Replacement Value of the item
5. Click *Save*



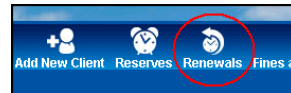
Renew Items

Items that are currently circulated Out to a patron can be renewed for either an additional loan period, or until a specified date. Renewals are accomplished by:

- *Check the item In and back Out again:* Maximum Number of Renewals will be ignored using this method
- *One Click Renewal:* see “One Click Renewal” on page 144
- *Renewal Wizard:* see “Web Renewal Wizard” below

Renewal Wizard Step 1

1. Enter the Patron in the *Circulation* window
2. Click *Renewals*
3. Either enter the new *due date* or use the pop-up Calendar to select a date.



Renewal Wizard

Wendy Brown currently has 4 item(s) out

Step 1

Please specify the Return Date or leave blank for loan type renewal (mm/dd/yyyy)

☐ Renew Overdue Items

Renew	Accession #	Call #	Title	Date Taken	Return Date	Fines
<input type="checkbox"/>	023922	811 CAT	Cat poems	1/23/2007	3/5/2007	\$0.00
<input type="checkbox"/>	018001	E KIP	Cat that walked by himself, The	10/29/2008	11/5/2008	\$0.00
<input type="checkbox"/>	004117	TXT HHS	History of our United States	1/23/2007	3/5/2007	\$0.00
<input type="checkbox"/>	L4U00057	796.93 CLA	Sixing	10/29/2008	11/5/2008	\$0.00

- If no date is entered, the Loan Type's Loan Period will be used to calculate the new *due date*
 - If the date used to renew an item is greater than the Global or Location Due Date, the date will default to the Global or Location Due Date.
4. If necessary Select *Renew Overdue Items*
 5. Do one of the following:
 - To renew all items displayed, Click *Renew all Items*
 - To renew specific items, Click each item to be renewed to place a check mark in the box beside the item. Click *Renew Selected Items*
 - To return to circulation, Click *Return to Circulation*

Renewal Wizard Step 2 - Renewal Preliminary Statistics

Renewal Wizard

Step #2 - Renewal Preliminary Statistics

4 Item(s) requested for Renewal
4 Items will be Renewed

[Go Back](#) [Renew](#)

Accession #	Call #	Title	Date Taken	Return Date	Fines	New Return Date
023922	811 CAT	Cat poems	1/23/2007	3/5/2007	\$0.00	11/5/2008
018001	E KIP	Cat that walked by himself, The	10/29/2008	11/5/2008	\$0.00	11/5/2008
004117	TXT HIS	History of our United States	1/23/2007	3/5/2007	\$0.00	11/5/2008
LAU00057	795.93 CLA	Skiing	10/29/2008	11/5/2008	\$0.00	11/5/2008

1. Messages are displayed detailing which items may be renewed and which may not be renewed and why
2. To continue with the renewal, Click *Renew*
3. To go back to Step 1 without renewing, Click *Go Back*

Renewal Wizard Step 3 - Renewal Results

Renewal Wizard

Step #3 - Renewal Results

4 Items have been Renewed

[Return to Renewals](#)

Accession #	Call #	Title	Date Taken	Return Date	Fines
023922	811 CAT	Cat poems	1/23/2007	11/5/2008	\$0.00
018001	E KIP	Cat that walked by himself, The	10/29/2008	11/5/2008	\$0.00
004117	TXT HIS	History of our United States	1/23/2007	11/5/2008	\$0.00
LAU00057	795.93 CLA	Skiing	10/29/2008	11/5/2008	\$0.00

1. A final confirmation screen is displayed showing the items that were successfully renewed and the new Due Dates

To Continue working with the same Patron:

1. Click *Return to Renewals*
2. Click *Return to Circulation*

OR:

To Work with another Patron:

1. Click the *Circulation* button in the *Freedom Toolbar*

Placing Reserves in Freedom Circulation

You can place reserves directly from Freedom Circulation. After a Patron is entered, perform a search for the item and click the Reserve button. Also, Reserves can be placed on all items in a Bookbag.

Single Item Reserve

1. From the Freedom Circulation screen, Enter a patron
2. Click Search

The screenshot shows the 'Circulation' system interface. At the top, there is a navigation bar with icons for 'Click Controls', 'Search', 'Add New Client', 'Reserves', 'Renewals', 'Fines and Charges', and 'Help Files'. The 'Search' icon is circled in red. Below the navigation bar, the 'Current selected Location' is 'Studebaker Smith-Henshaw HS'. There are two search sections: 'Patron Search' and 'Title Search'. The 'Title Search' section has a 'Title' input field, which is circled in red. Below the search sections, a table shows search results for 'Title Search produced 1 results'. The table has columns for 'Title', 'Accession #', 'Call #', and 'Status'. The first row shows 'Art and architecture in Canada', '000918', 'REF 016.70971 LER', and 'In'. The 'Status' column has a 'Reserve' button, which is circled in red. Below the table, there is a 'Patron' section with a photo of a woman and details: Name: Fran Star, Code: CD152, Homeroom: Studebaker Smith-Henshaw Sec, Grade: 10's, Homeroom Code: SSH10, Items Out / Max: 0/10, Override Days: 0, Total for Year: 0, Total Fines: \$0.00, Other Charges: \$0.00. There is also an 'Item' section with a barcode input field and 'Enter' and 'Clear' buttons.

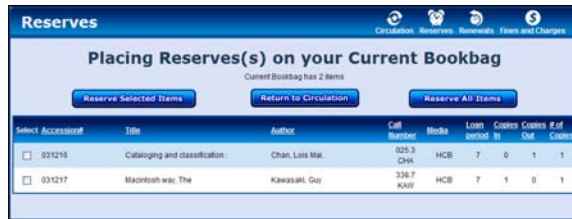
3. Enter the Title or a portion of the Title
 - L4U performs a *Starts With* search, ie: Search on CAT produces Cat, Cats, Cataclysm, etc.
 - Start the search criteria with the L4U Wildcard: @ to perform a *Contains* search, ie: Search on @CAT produces Captain Cat, My Family Vacation, etc
4. Click the *Query Icon* to start the search
5. Click *Reserve* for the desired Title

Multiple Item Reserve

1. Create a bookbag of the item(s) to be reserved, see “Working with Bookbags” on page 55.
2. From the Freedom Circulation screen, Enter a patron
 - The bookbag contents can also be created after the patron is entered.
3. Click the *Reserves* button
 - To return to Freedom Circulation, Click *Return to Circulation*
4. Click *Place a Reserve*
5. Do one of the following:
 - Select the checkboxes beside the items to reserve and Click *Reserve Selected Items*

The screenshot shows the 'Circulation' system interface. At the top, there is a navigation bar with icons for 'Click Controls', 'Search', 'Add New Client', 'Reserves', 'Renewals', 'Fines and Charges', and 'Help Files'. The 'Reserves' icon is circled in red. Below the navigation bar, the 'Current selected Location' is 'Studebaker Smith-Henshaw HS'. There is a 'Patron' section with a photo of a woman and details: Name: Fran Star, Code: CD152, Homeroom: Studebaker Smith-Henshaw Sec, Grade: 10's, Homeroom Code: SSH10, Items Out / Max: 0/10, Override Days: 0, Total for Year: 0, Total Fines: \$0.00, Other Charges: \$0.00. There is also an 'Item' section with a barcode input field and 'Enter' and 'Clear' buttons. Below the 'Item' section, there is a 'Reserves' section with a 'Return to Circulation' button and a 'Place a Reserve' button, which is circled in red. The 'Place a Reserve' button has a tooltip that says 'Place all 2 items in your current Bookbag'.

- Click *Reserve All Items*



6. The next page displays a listing of all the patron's reserves
7. Click *Return to Circulation* to return to the Freedom Circulation screen

Deleting iPAC Reserves¹

To view and delete reserves in Freedom Circulation:

1. From the Freedom Circulation screen, enter a patron
2. Click the *Reserves* button
 - To return to Freedom Circulation, Click *Return to Circulation*
3. The iPAC reserves screen appears with all current reserves listed
4. Do one of the following:
 - Select the checkboxes beside the items to be removed from reserves and Click *Delete Selected Reserves*
 - Click *Delete All Reserves*
5. If everything is correct, Click *Confirm*
 - To make adjustments before finalizing the deletion, Click *Go Back*
6. The next page displays a listing of all the patron's reserves
7. Click *Return to Circulation* to return to the Freedom Circulation screen

Fine Payments

From Freedom Circulation, you can

- View Returned Item Fines
- View Active Fines
- View Total Charges
- Add Other Charges
- View Patron Fine History
- Enter Payments to Fines and/or Other Charges
- Waive Fines and/or Other Charges

To access *Fines and Charges*:

1. From the Freedom Circulation screen, enter a patron.

- Click the *Fines and Charges* button.



- Process the transactions as below.
- To return to circulation at any point, Click *Return to Circulation*.

Returned Item Fines

Returned Item Fines are fines charged on overdue items that have been returned. Until an overdue item has been returned, fines that are accruing on the item appear in Active Fines. Returned Item Fines can be paid or waived.

Pay Fines

Fines & Other Charges

Jim Scanlon
Homeroom: Staff

Total Amount Due: \$72.00
Fines: \$72.00
Other Charges: \$0.00
Total Credits Available: \$0.00
Payment:
Change Due: \$0.00

Buttons: Waive Fines, Waive Charges, Apply Credit, Apply Payment, Return Change, Create Credit

Returned Item Fines	Active Fines	Total Charges	Add a Charge	Client Fine History		
Pay	Waive	Accession #	Title	Return Date	Fine	Amount Paid
<input type="checkbox"/>	<input type="checkbox"/>	001455	Internet field trips	11/5/2008	\$24.00	\$0.00
<input type="checkbox"/>	<input type="checkbox"/>	000825	Internet for teachers, The	11/6/2008	\$24.00	\$0.00
<input type="checkbox"/>	<input type="checkbox"/>	000824	Multimedia authoring workshop with Director 5, The	11/5/2008	\$24.00	\$0.00
					Balance:	\$72.00

[Return to the Top of the Page](#)

- Ensure that the *Returned Item Fines* tab is selected
- Check off in the *Pay* column, those items to which the payment is to be applied
- Enter the payment amount in the *Payment* field
- Click *Apply Payment*
- The Confirmation Page is displayed
- To confirm the payment, Click *Confirm*
 - To return to the Fines and Other Charges screen without applying the payment, Click *Go Back*
- If the payment amount is greater than the total fines for the items selected, the amount will be displayed in the *Change Due* field.
 - To return the change to the patron, Click *Return Change*
 - To apply the change as a credit, Click *Create Credit*

Waive Fines

1. Ensure that the *Returned Item Fines* tab is selected
2. Check off in the *Waive* column, those items whose fines you wish to waive
3. Click *Waive Fines*
4. The Confirmation Page is displayed
5. To confirm waiving the fines for these items, Click *Confirm*
 - To return to the Fines and Other Charges screen without waiving the fines, Click *Go Back*

View Active Fines

Active Fines is the amount owing on items currently overdue and not yet returned. To view fines that have accrued on items that are still out, select the *Active Fines* tab.

Total Charges

Fines or charges may be incurred for reasons other than Overdues, such as lost items, photocopying, damaged materials, etc. These charges can be entered, paid or waived in Freedom Circulation.

Pay	Waive	Description	Charge	Amount Paid
<input type="checkbox"/>	<input type="checkbox"/>	Photocopying	\$3.00	\$0.00
<input type="checkbox"/>	<input type="checkbox"/>	Photocopying 11/05/08	\$2.50	\$0.00

Balance: \$5.50

Make a Payment

1. Ensure that the *Total Charges* tab is selected
2. Check off in the *Pay* column, those items to which the payment is to be applied
3. Enter the payment amount in the *Payment* field
4. Click *Apply Payment*
5. The Confirmation Page is displayed
6. To confirm the payment, Click *Confirm*
 - To return to the Fines and Other Charges screen without applying the payment, Click *Go Back*
7. If the payment amount is greater than the total charges for the items selected, the amount will be displayed in the *Change Due* field.
 - To return the change to the patron, Click *Return Change*

- To apply the change as a credit, Click *Create Credit*

Waive a Charge

1. Ensure that the *Total Charges* tab is selected
2. Check off in the *Waive* column, those items for which charges are to be waived
3. Click *Waive Charges*
4. The Confirmation Page is displayed
5. To confirm waiving the charges for these items, Click *Confirm*
 - To return to the Fines and Other Charges screen without waiving the fines, Click *Go Back*

Add a Charge

Charges incurred for reasons other than Overdues can be entered in Freedom Circulation

1. To enter a new charge, ensure that the *Add a Charge* tab is selected



2. In the *Description* field, enter the nature of the charge
3. In the *Amount* field, enter the amount of the charge
4. Click *Apply*
 - Click the *Total Charges* tab to view the new charge

Apply Credits

If overpayments have been applied to the patron's account as a credit, then the credit may be applied to either fines or other charges. The process is very similar to applying a payment. To apply a credit:

1. Select either the *Returned Item Fines* tab or the *Total Charges* tab
2. Check off in the *Pay* column, those items to which the credit is to be applied
3. Click *Apply Credit*
4. The Confirmation Page is displayed
5. To confirm the application of the credit, Click *Confirm*
 - To return to the Fines and Other Charges screen without applying the credit, Click *Go Back*

Client Fine History

All fines and other charges that have been paid or waived can be reviewed by selecting the *Client Fine History* tab. Information displayed includes the description of the

fine or charge, the date charged and paid/waived, the amount of the fine/charge and the amounts paid or waived.

Fines & Other Charges

Jim Scanlon
Homeroom: Staff

Total Amount Due: \$49.70
Fines: \$47.20
Other Charges: \$2.50

Total Credits Available: \$0.00
Payment:
Change Due: \$0.00

Buttons: Waive Fines, Waive Charges, Apply Credit, Apply Payment, Return/Change, Create Credit

Accession #	FIC	Title/Description	Charge Date	Fines/Charges	Amount Paid	Status	Paid/Waived
001455		Internet field trips	11/6/2008	\$24.00	\$24.00	Paid	10/29/2008
000825		Internet for teachers, The	11/6/2008	\$24.00	\$24.00	Paid	10/29/2008
000858		Complete idiot's guide to creating an HTML 4 Web page, The	10/23/2008	\$23.00	\$23.00	Paid	10/29/2008
		Photocopying	11/6/2008	\$3.00	\$3.00	Paid	10/29/2008

[Return to the Top of the Page](#)

Circulation Alerts

Throughout Freedom Circulation, L4U uses various alerts or messages to notify the user of special circumstances. These can include patrons with overdues and/or fines, reserved items ready to be picked up or maximum number of borrowed items reached. When these messages appear, steps must be taken to either clear the message or provide L4U with the requested information. The following are examples of messages a user may encounter.

Client with Overdues

Overdue notices will appear when a patron with Overdues is entered in Circulation. The overdue items are displayed in red in the Item Info area.

Client with Fines

If a patron has outstanding fines, a warning message will appear. To allow circulation, Click *Allow*. To prevent further circulation to this patron, Click *Disallow*.

Circulation

Mode: Auto

Enter Barcode Here: C0006

Buttons: Enter, Clear

Client has total Fines of \$187.60
Allow Circulation? (msg#QB)

Buttons: Allow, Disallow

Maximum Reached

If a Patron attempts to Circulate an additional item after his/her maximum number allowed is reached, a warning message will appear. To allow the circulation, Click *Allow*. To prevent circulation of the additional item, Click *Disallow*.

Client has reached the MAXIMUM of 2 Item(s) Out.
Allow Circulation anyway? (msg#QA)

Allow **Disallow**

Patron

 Code: C0097 Name: Chelsea Bialon
Homeroom: Force Homeroom Code: Mr. Force's Kindergarten Class
Items Out/Max: 2/2 Override Days: 0
Modify Client Total for Year: 7 Total Fines: \$58.70 Other Charges: \$0.00

Returned Item has Accrued Fines

When an Overdue Item is checked back In, a warning message appears notifying the user that the item has accrued fines. This message only appears if Fines are being used, and the Show “Pay Fines” option has been activated.

Reserve Arrival Messages

If a patron is entered in Circulation and the item they have reserved is available, a notification message will appear. The message will appear each time the patron is entered, until the reserve is either deleted or the item circulated out to the patron.

Circulation Cir. Controls Reserves Renewals Fines and Charges

Mode: Auto

Enter Barcode Here: 00100 **Enter** **Clear**

Reserve Arrived : 003626 Flying ace : (msg#C21)

Delete **Continue**

Prior Reserves

Occasionally patrons attempt to borrow items that have been reserved for someone else. When the circulation attempt is made, a message will appear stating that a prior reserve exists. The user can then choose to circulate the item anyway by Clicking *Allow* or not by Clicking *Disallow*.

Suspended Client

If a Patron currently has a status of suspended, they are not permitted to borrow materials from the library. When a suspended Patron is entered in Circulation, an Alert will display and circulation will be prohibited.

Account Expired

If a Patron currently has a Card Expiry Date that has passed, they are not permitted to borrow or renew materials from the Library. When a Patron with an expired account is entered in Circulation, an Alert will display. To clear the Alert, Click *Allow* or *Disallow* as appropriate.

Bonus Reached

If a library chooses to award bonuses to patrons circulating a specified number of books, that value can be entered in Preferences. Once a patron reaches the designated number of circulations, L4U will display a message notifying the user that the bonus amount has been reached.

Temporary Barcodes

Occasionally a library collection contains items that are disposable or new items that have not yet been cataloged but are available for circulation. Users may wish to utilize a temporary barcode to track the circulation of these types of items. A generic record must be created and posted to the Library File, see “To Create an Item Record” on page 82 for each temporary barcode number. Generic records must have a Department of VF (Vertical File). Records assigned the Vertical File Department are designed to be defined at the time of circulation.

To circulate an item as a temporary barcode:

1. In Circulation, Enter a client
2. Manually enter the Barcode or Title of the generic item
3. The Bibliographic Note field displays, Enter the item description
4. Click *OK*
 - This item has now been circulated Out

To circulate the item back In:

1. In Circulation, manually enter the Barcode or Title of the generic item
2. The Bibliographic Note field displays with the description of the item entered at the time of circulation
3. Click *OK*
 - The item has now been circulated In



Note: If the library does not contain Vertical Files but does use the temporary barcode system, the VF department definition can be modified to read Temporary Barcode rather than Vertical File.

Circulation Period Hierarchy

When an Item is checked Out from the Library, the length of time the Item will circulate for is determined by several settings (Example: Loan Type, Client File, Circulation, etc.). The circulation period can be controlled on several levels, therefore a

hierarchy must exist with specific settings always taking precedence over others. The hierarchy is listed below from lowest priority to highest.

Loan Type Code

Each item in the library collection has a mandatory Loan Type Code. Loan Type Codes are assigned a circulation period. When an item is circulated, its date due is based on the number of days in its designated loan type circulation period.



Note: The Loan Type Code can be configured to override the Client's Circulation Override. To use this feature, see "Creating Loan Types" on page 75 in the *L4U Users Manual*.

Client Circulation Override

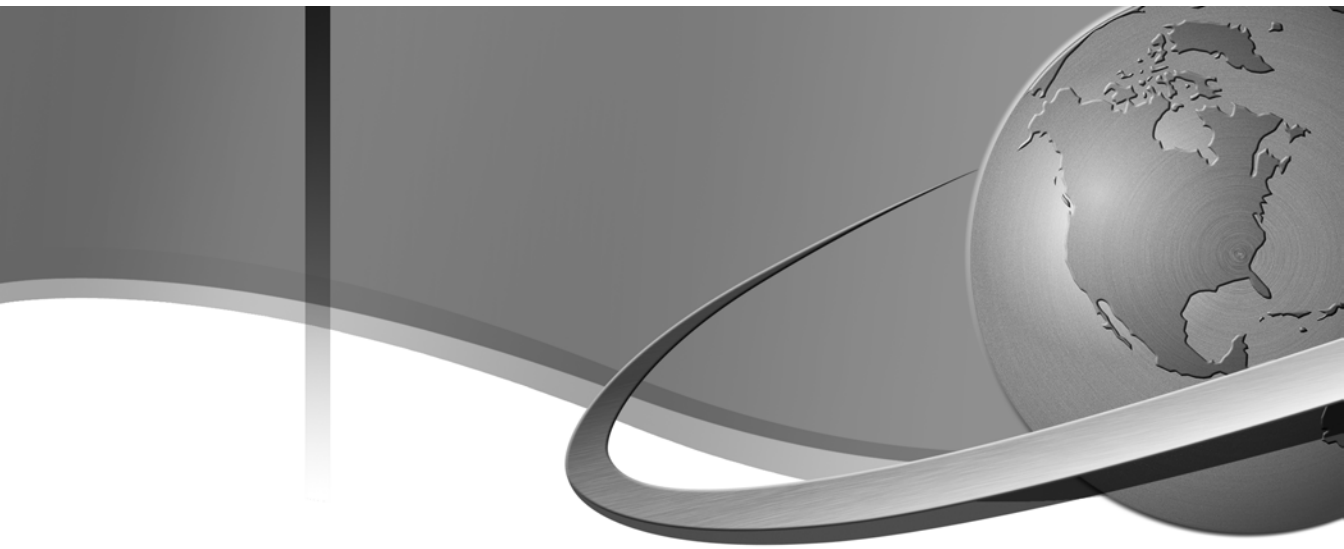
A Patron's Circulation Override value will take precedence over the Loan Type Code circulation period. This setting is useful for patrons who require set circulation periods that usually exceed a normal Loan Type period. For Example: If a Patron with a Circulation Override of 10 days checks Out a book with a Loan Type Code set to 7 days, the due date will be 10 days from the current date.

Circtime Override

By selecting *Circtime Override* within Circulation, an alternative circulation period can be entered when checking an item Out. The value entered will override all other loan periods, excluding the Global Due date. A setting within Preferences will determine whether L4U requests a due date or the number of circulation days. To change this setting, "Circtime Override Options" on page 46 in the *L4U Users Manual*.

Global Due Date

This is the highest level in the circulation hierarchy. This date is set in Preferences and is the last possible due date. This date will override all other circulation periods. Global Due Date can be used for collecting materials before an inventory or library closure. This date must be entered in the correct format for proper program functionality (MM/DD/YYYY).



CHAPTER 8

RESERVES

- Placing Reserves
- Viewing and Modifying Reserves

Placing Reserves

In L4U Freedom, it is possible to place a Reserve or Hold with a single click in the Circulation window or place a reserve on all the items in a bookbag. Also, a Reserve can be placed on an item that is currently in or out of the library.

The screenshot shows the 'Circulation' window in L4U Freedom. The current selected location is 'Studebaker Smith-Henshaw HS'. There are search bars for 'Patron Search' and 'Title Search'. Below the title search, it says 'Title Search produced 3 results'. A table lists the results:

Title	Accession #	Call #	Status	Action
Science fair bunnies	002598	E LAS	In	Reserve
Science fair from the Black Lagoon The	002480	FIC THA	In	Reserve
Science is fun	000292	TR 507 YOU	In	Reserve

Below the table, there is a 'Mode: Auto' section with an 'Enter Barcode Here' field and 'Enter' and 'Clear' buttons. On the left, there is a 'Patron' section with a photo of a woman and details: Name: Fran Star, Code: C0152, Homeroom: Studebaker Smith-Henshaw, Sec Grade 10's, Homeroom Code: SSH10, Items Out / Max: 0/10, Overdue Days: 0, Total for Year: 0, Total Fines: \$0.00, Other Charges: \$0.00. There is a 'Modify Client' button. On the right, there is an 'Item' section with a search bar. On the far right, there is a vertical sidebar with icons for 'Circ Mode', 'AUTO', 'INCOMING ONLY', 'OUTGOING ONLY', and 'STATUS CHECK'.

Reserves are placed Circulation for the current patron. Please refer to “Placing Reserves in Freedom Circulation” on page 146 for more information on Single Item or Multiple Item Reserves.



Note: When multiple copies of an item exist, all copies will be Reserved. The circulation of any of the copies to the patron will satisfy the Reserve.

Reserves in a Union Catalog with L4U Enterprise

A Union catalogue is the combined holdings of two or more libraries or collections. If the library administrator allows you to work or edit in more than one collection, L4U needs to know which collection your administrative tasks will affect. If so, Select a

location from the drop down list before performing Freedom administrative tasks. If the drop down list is not available, then you have access to only one collection.



Viewing and Modifying Reserves

Existing Reserves can be viewed, modified and/or deleted from L4U Freedom. Also, patrons may view and modify their own reserves from their My Profile in the iPAC (see page 65). From the Reserves Management screen, administrators have the ability to delete or modify existing Reserves. To view existing Reserves:



1. In iPAC, login to *Freedom*, see “L4U Freedom Login” on page 66
2. Click *Reserves Management* in the *Freedom Toolbar*
3. Using the Quick Search feature, specific Reserves can be located. Please refer to “Quick Search” on page 112 for more information.

4. To view the details of a specific Reserve, Double Click the record

Reserve/Hold Management.

Current selected Location: Studebaker Smith-Hanshaw HS

Item on Reserve

Accession: 001439
 Title: 3-2-3 draw cartoon animals
 Author: Harr, Steve
 Due Date: 00/00/00
 Status: In

Client Reserving Item

Client Code: 00012
 Client Surname: Cople
 Date wanted: 3/9/2009
 Date of booking: 00/00/00
 Time of booking: 00:00:00
 Ship Date: 3/9/2010
 Client Name: Greg
 Unit Date: 00/00/00

Powered by Library 4 Universal™ Library Administration Software - L4U Freedom
 Copyright © 2010 SRB Education Solutions All Rights Reserved - Worldwide C3.3

5. Dates can be changed as necessary by Clicking in the appropriate field and Entering the new information
6. To Exit the record, Click *Save*
 - To Exit without saving changes, Click *Cancel*
7. From the list view, Reserves can be sorted, queried and/or deleted. For more information on these functions, please see “Overview of Data Management” on page 112.



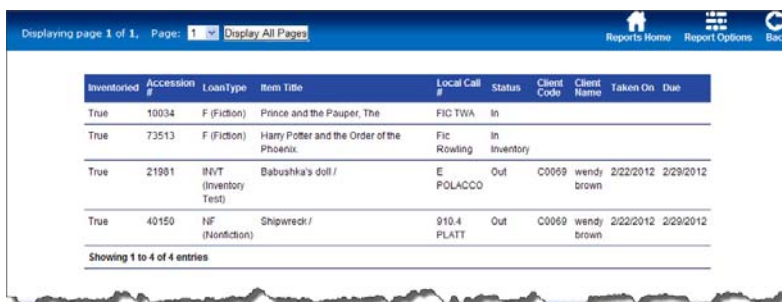
CHAPTER 9

INVENTORY

- 0 ● Inventory Concepts
 - Best Practices
 - Web Privileges
 - Enabling Inventory
 - Counting Inventory
 - Inventory Reports
 - Processing Inventory
 - Turning Inventory Off

Inventory on the Web

Inventory can be performed at any location at any time. Inventory reports can be generated from Freedom Reports or the Admin Utility. Portable Inventory Scanners barcodes can be imported into Freedom too. Inventory via the web allows for remote inventory counts such as classroom bound textbooks or secondary locations for collections housed in various buildings.



Invenoried	Accession #	LoanType	Item Title	Local Call #	Status	Client Code	Client Name	Taken On	Due
True	10034	F (Fiction)	Prince and the Pauper, The	FIC TWA	In				
True	73513	F (Fiction)	Harry Potter and the Order of the Phoenix	Fic Rowling	In Inventory				
True	21901	INVT (Inventory Test)	Babushka's doll /	E POLACCO	Out	C0069	wendy brown	2/22/2012	2/29/2012
True	40150	NF (Nonfiction)	Shipwreck /	910.4 PLATT	Out	C0069	wendy brown	2/22/2012	2/29/2012

Showing 1 to 4 of 4 entries

Best Practices

- Before starting Inventory, make sure to set a schedule, and stick to it. Place a reminder somewhere near the Inventory station to shut off Inventory on a specific date.
- If performing Inventory with a portable Inventory scanner, unpack the scanner about a month before the Inventory is scheduled, and test to ensure that the scanner is working properly.
- All items currently out of the library are ignored during Inventory. It is assumed that if an item is out, its location is known, and therefore does not need to be inventoried.
- If time is a factor, Inventory can be processed one Loan Type at a time. If Inventory only needs to be processed for a few Loan Types, use this option for Inventory.
- Don't restart Inventory to count one or two Items that were missed during Inventory. Deal with the missed items on an individual basis though Library File.
- Don't change the Status of Library Items to Lost while Inventory is Active. Leave the item uncounted and L4U will automatically change the Status when the counts for that loan type are processed.
- Avoid adding or deleting items in the collection during Inventory. Changes to the data file should be done after Inventory is complete.

Enable Inventory

Inventory must be enabled or turned on in Location Preferences before actual counting of materials takes place. Currently, this is done in the Enterprise Administrative Utility (Admin Utility or AU). To turn Inventory on by Location:

1. From the Admin Utility, *Authority Files>Locations*
2. Open the desired Location
3. Click *Preferences*
4. Place a Check in the Inventory checkbox
5. Click *Yes* to confirm
6. Click *Save* to Exit Location Preferences
7. Click *Save* to return to the Locations window

Enable Inventory Access in Freedom

Now that Inventory is enabled, make sure that the people performing inventory have the correct web privileges to do so. Determine which Homeroom the people belong to and modify the Homeroom's Web Privileges. It is assumed the patrons in the Homeroom have a PIN assigned to them so they can login. For more information on Web Privileges, please refer "Setting Web Privileges" on page 27 in the *L4U Web Manual*.



Note: *Best Practice:* Create a Patron called Inventory Clerk and put them in a Homeroom with just Inventory privileges. Give your Inventory assistants this web login and they can use any laptop as an Inventory only workstation.

Counting Inventory

Counting items can be accomplished in two ways:

- Scanning or manually entering barcodes into an Inventory screen
- Importing barcodes from an Inventory Scanner

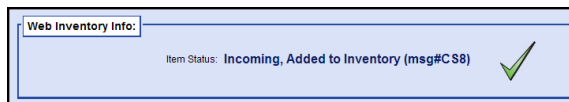
Scanning Barcodes using a Scanner

This is the most common method of counting items in L4U Inventory:

1. From the Freedom Home Page, click the *Inventory* icon
2. Scan or manually enter the item's Accession Number (barcode) into the *Enter Item Barcode:* field
 - L4U will beep and *Item Status* will indicate that the item is *Added to Inventory* (ie: counted towards Inventory)
 - If the barcode was manually entered, Click *Proceed* OR Press ENTER/RETURN on the keyboard
3. Repeat step 2 until all Items have been processed
 - If an Item with a Status of *In* is scanned into a *Circulation* screen, it is circulated Out and counted towards Inventory.
 - If an Item with a Status of *Out* is scanned into a *Circulation* screen, it is circulated In and counted towards Inventory. It's status will then be *In Inventory*.
 - If an Item with a Status of *In* is scanned into an *Inventory* screen, it is counted towards Inventory. It doesn't matter if you scan it multiple times.



- If an Item with a Status of *Out* is scanned into an *Inventory* screen, it is circulated back In and counted towards Inventory. It's status will then be *In Inventory*.



- If an Item with a Status of anything other than *In* or *Out* (eg: Missing, Lost, etc) is scanned into an *Inventory* screen, it is not counted towards Inventory and the Status remains as it was. Correct the status of the item in the Library File and then scan the item into an Inventory screen to count it towards Inventory.



Importing Barcodes from a Portable Scanner

After scanning the barcodes with the portable scanner, they have to be transferred to the computer running Freedom Inventory. The barcodes are then imported into L4U. Please refer to the documentation that came with the scanner on how to transfer or upload the barcodes. Uploading barcodes using the CipherLAB CPT-711 Scanner is

described below. For more information on other L4U Inventory scanners, please refer to “Inventory using a Portable Scanner - Elite” on page 298 in the *L4U Users Manual*.

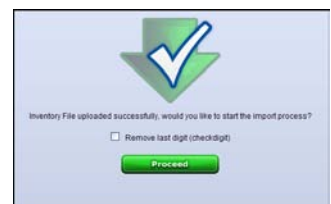
Before attempting to upload scans to a computer, please ensure that the Keyspan USB Serial Adaptor, CPT-711 and desk cradle have been installed correctly as per the L4U Installation Instructions.

Upload Scans to the Computer

1. Place the CPT-711 Inventory Scanner in the Desk Cradle
2. Run the CPT-711 software from the CPT-711 icon on the computer desktop
3. Click the *Menu Button* in the CPT-711 software application
4. Select *Com Port Settings*
5. Ensure the COM Port is set to *COM 3* and click *OK*
6. Press the **2** Key on the CPT-711 Inventory Scanner keypad
7. Click the *Menu Button* in the CPT-711 software application
8. Select *Receive Data>Via RS-232 or IrDA*
9. In the Save As dialogue box, Choose a location to save the file (e.g: computer desktop or a network share) and a file name for the saved text file (i.e. FictionInv02-04-2008.txt)
10. Once the upload is complete you will be given the option of viewing the data or not. If you do view the data, please ensure the file is Closed before proceeding to the next section *Import Scans into Freedom Inventory*.
11. At the CPT-711 Inventory Scanner it is advised to delete the scans on the scanner.
To Delete the Scans:
 - Press **1** on the key pad
 - Press **1** on the key pad again
 - The scans will now be deleted from the CPT-711 Inventory Scanner
12. The scans are uploaded to the computer

Import Scans into Freedom Inventory

1. From the Freedom Home Page, click the *Inventory* icon
2. From the Inventory Toolbar, Click *Import Inventory File*
3. Click *Browse*
4. Navigate to the location of the file containing the barcodes and *Open* it
5. Click *Upload*
6. Click *Proceed*
 - If your scans have a checkdigit, Click *Remove last digit (checkdigit)*
7. A list of barcodes will appear with a status of each item.



8. *Print* or return to another Freedom module as appropriate.

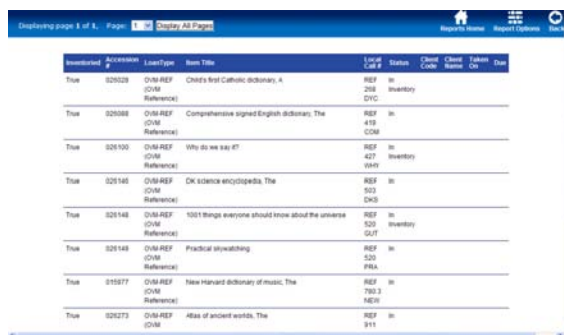


The screenshot shows the 'Inventory' module in the Freedom software. The title bar includes the Freedom logo and various icons. The main window has a menu bar with 'Inventory Home', 'Import Inventory File', and 'Help File'. Below the menu bar is a table with the following columns: Accession, Title, Local Call#, and Comments. The table contains 10 rows of data, each representing an inventory item with its accession number, title, local call number, and a comment about its status or location.

Accession	Title	Local Call#	Comments
026028	Child's first Catholic dictionary, A	REF 268 DYC	Status Error: Showing as Lost, Added to Inventory
026088	Comprehensive signed English dictionary, The	REF 418 CCM	Added to Inventory
026100	Why do we say it?	REF 427 WNY	Status Error: Showing as Missing, Added to Inventory
026146	DK science encyclopedia, The	REF 503 DKS	Added to Inventory
026148	1001 things everyone should know about the universe	REF 520 GUT	Status Error: Showing as Missing, Added to Inventory
026149	Practical skywatching	REF 520 PRA	Added to Inventory
015977	New Harvard dictionary of music, The	REF 780.3 NEW	Added to Inventory
026273	Atlas of ancient worlds, The	REF 911 MIL	Added to Inventory
020631	Ultimate panoramic atlas	REF 912 ULT	Added to Inventory
020630	Ultimate panoramic atlas	REF 912 ULT	Added to Inventory
020629	Ultimate panoramic atlas	REF 912 ULT	Added to Inventory
020660	Atlas of ancient America	REF 915 COE	Added to Inventory

Inventory Reports

Freedom can print inventory reports for partial or full inventories with different sort options. Inventory reports can be viewed or printed at any time while Inventory is enabled or active. To do so:



The screenshot shows the 'Reports' module in the Freedom software. The title bar includes the Freedom logo and various icons. The main window has a menu bar with 'Reports Home', 'Report Options', and 'Print'. Below the menu bar is a table with the following columns: Accession, Loan Type, Item Title, Local Call#, Status, Check Code, Check Name, Check Date, and Date. The table contains 10 rows of data, each representing an inventory item with its accession number, loan type, item title, local call number, status, check code, check name, check date, and date.

Accession	Loan Type	Item Title	Local Call#	Status	Check Code	Check Name	Check Date	Date
True 026028	OVR-REF (OVR-REF Reference)	Child's first Catholic dictionary, A	REF 268 DYC	In Inventory				
True 026088	OVR-REF (OVR-REF Reference)	Comprehensive signed English dictionary, The	REF 418 CCM	In Inventory				
True 026100	OVR-REF (OVR-REF Reference)	Why do we say it?	REF 427 WNY	In Inventory				
True 026146	OVR-REF (OVR-REF Reference)	DK science encyclopedia, The	REF 503 DKS	In Inventory				
True 026148	OVR-REF (OVR-REF Reference)	1001 things everyone should know about the universe	REF 520 GUT	In Inventory				
True 026149	OVR-REF (OVR-REF Reference)	Practical skywatching	REF 520 PRA	In Inventory				
True 015977	OVR-REF (OVR-REF Reference)	New Harvard dictionary of music, The	REF 780.3 NEW	In Inventory				
True 026273	OVR-REF (OVR-REF Reference)	Atlas of ancient worlds, The	REF 911 MIL	In Inventory				

1. From the *Freedom Toolbar*, click the *Reports* icon
2. Click *Inventory Statistics*
3. Click *Continue*
4. Select which items to display for either:
 - *Full or Complete Inventory*: Leave the Display Items drop down list at *All Loan Type(s)*
 - *Partial Inventory*: Select the appropriate Loan Type from the Display Items drop down list
5. Select either *Currently Inventoried* (Counted) or *Non Inventoried* (Not Counted)
6. Select the desired Sort Order from the *Select Sort Order*: drop down list
7. Click *Generate Report*
8. A list of barcodes will appear with a status of each item
9. Print or return to another Freedom module as appropriate

Inventory Reports After Inventory has Been Turned Off

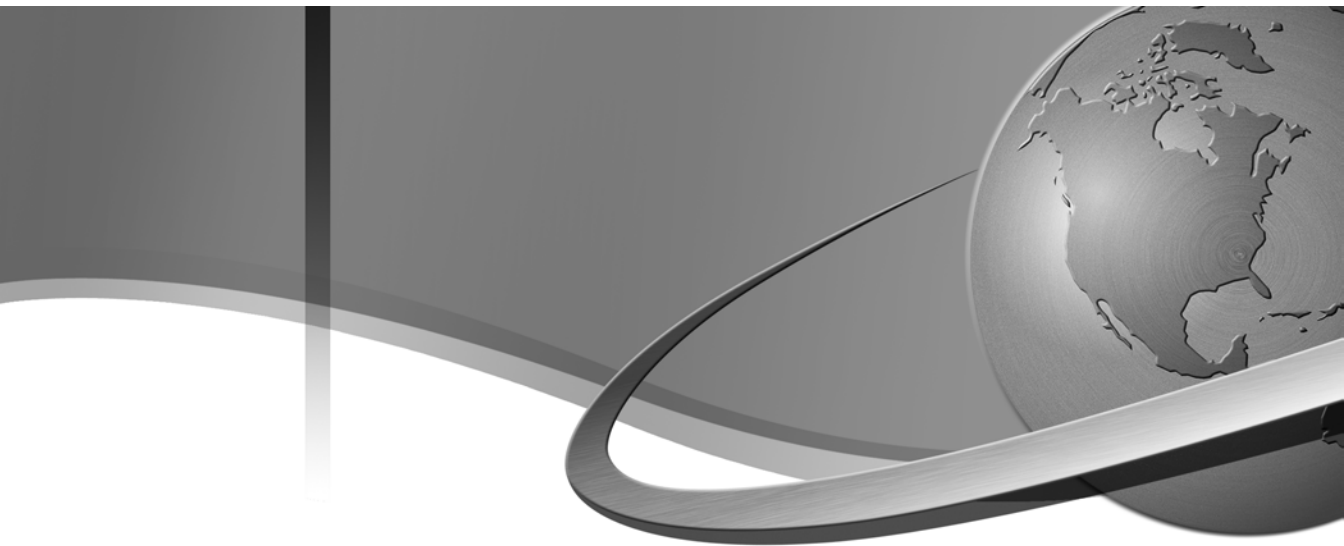
Once Inventory has been turned off, the ability to print detailed inventory reports is limited. All that can be done is to use the Status Report and search the Status that was used to mark those Items as Lost when inventory was turned off. To do so:

1. From the Freedom Toolbar, click the *Reports* icon
2. Click *Items Status Report*
3. Click *Continue*
4. In the *type Status Manually* field, enter the Status that was assigned to Lost Items (i.e. Lost/20012)
5. Select the desired Sort option
6. Click *Generate Report*
7. Use the internet browser's Print function to print these items in a detailed report

Turning Inventory Off

Inventory should be turned off after all required reports have been printed and missing materials have been accounted for. The steps to Turning Inventory Off differs depending on which version of L4U you're currently using.

- *Platinum Elite Users*: Please refer to "Turning Inventory Off - Elite" on page 303 in the *L4U Users Manual* for more information
- *L4U Enterprise Users*: Please refer to "Turning Inventory Off" on page 307 in the *L4U Users Manual* for more information



CHAPTER 10

FREEDOM REPORTS

- Online Reports in L4U Freedom
- Creating Item Reports
- Creating Patron List Reports
- Creating Patron History Reports
- Creating Patron Fines/Other Charges Reports

Online Reports in L4U Freedom

Reports can be quickly and easily produced in L4U Freedom. The reports fall into two categories - materials based or patron based. Overdue reports, materials currently circulating, fines and/or other charge reports can be quickly and easily generated.

Item Reports

Freedom Item Reports offers a variety of reports ranging from Items Out to statistics for Loan Types and Inventory. First select the type of report required, then narrow the scope of the report, specify the sort and Freedom will produce a predefined report. The different reports and what options are described in the following section.

Items Out or Overdue Report

Items Out, either overdue only or all items out for all homerooms or specific homerooms or patron are available. The options are similar for both Items Overdue and Items Out, so only the Items Overdue Report is shown below.

1. Log into L4U Freedom, see “L4U Freedom Login” on page 66.
2. Click *Reports*
3. Choose the desired report and click *Continue*
 - Items Overdue Report - List of items overdue with options.
 - Items Out Report - List of items currently circulating, including overdues.
4. Choose the *Report Options*

- Auto-Search by Client Code/Client Name or Homeroom Code/Homeroom Name is available if the appropriate option is checked.

Items Overdue Report Options

Report on All Items ☐

Report on Specific Homeroom ☐

Report on Specific Client ☒ c00

Include Hidden Departments ☐ c0004

Select Sort Order: Homeroom

Print each Homeroom on a separate page ☒

If unsure of the Client Code - enter the first few letters

- Enter a portion of the Client Code/Client Last Name or Homeroom Code/Homeroom Name.
 - Select the desired Client or Homeroom from the drop down list.
 - Specify the *Sort Order* from the drop down list.
 - Check *Include Hidden Departments* if desired to include materials normally hidden from patron searches
 - Check *Print each Homeroom on a separate page* to have each homeroom print on separate page
5. Click *Generate Report* to produce the report
 - Click *Reports Home* or *Go Back* to return to the *Online Reports*
 6. The desired report will appear on screen
 - Use the drop down list to navigate to the other pages if more than one page is available
 - *Reports Home* - returns to *Online Reports*
 - *Report Options* - returns to the current *Report Options* page
 - *Back* - returns to the previous page
 7. To Print All Pages with the selected Page Break Option, Click *Display All Pages*
 8. Print the Report using your internet browser's Print command

- Please consult the documentation or help files associated with your internet browser on how to Print

Displaying page 1 of 1, Page: [Display All Pages](#)

[Home](#)
[Report Options](#)
[Back](#)

Items Overdue Report for Sep 18, 2009 at 1:54 PM

Client Info	Item Info	Circ. Info
Hillview Elementary Div 17 (Students)		
Bialon, Chelsea C0097	Item Title: Clifford the big red dog: the dog who cried "Woof!" Item Call #: E BAR Item Accession #: 011065	Due: 4/14/2009 Out: 4/7/2009 Days Overdue: 113
Stony, Max C0218	Item Title: Clifford's kitten Item Call #: E BRJ Item Accession #: 028030	Due: 4/22/2009 Out: 4/15/2009 Days Overdue: 107
Hillview Elementary Staff		
Prior, Stan C0011	Item Title: Differentiated instructional strategies in practice : Item Call #: 371.394 GRE Item Accession #: 003190	Due: 4/8/2009 Out: 4/1/2009 Days Overdue: 117
Prior, Stan C0011	Item Title: Succeeding with standards : Item Call #: 370.158 CAR Item Accession #: 003576	Due: 4/14/2009 Out: 4/7/2009 Days Overdue: 113
Prior, Stan C0011	Item Title: Guided comprehension in the primary grades Item Call #: 372.47 MCL Item Accession #: 003593	Due: 4/8/2009 Out: 4/1/2009 Days Overdue: 117
Prior, Stan C0011	Item Title: Leadership capacity for lasting school improvement Item Call #: 371.2 LAM Item Accession #: 003594	Due: 4/8/2009 Out: 4/1/2009 Days Overdue: 117
Hillview Elementary TL's		
Messenger, Braden C0019	Item Title: Ecstasy Item Call #: 362.299 CON Item Accession #: 003528	Due: 4/21/2009 Out: 4/14/2009 Days Overdue: 108



Note: A list of materials currently circulating for the patron can be produced from the Circulation window. Printing from this window produces a printer friendly page.

Overdue Reports by Email

L4U allows overdue notices or reminders to be emailed to Patrons or Homerooms. For this feature to operate properly, valid emails have to exist in the patron records (see "Additional Info" on page 131) and the homeroom files (see "Homerooms" on page 62 in the *L4U Users Manual*). The notice contains the selected details of the overdue items.

Email to Patron

Subject: Overdue Items from L4U Enterprise Training Library

L4U Enterprise Training Library is listing that you have 2 items overdue. The details of those overdue items are listed below:

Client Code: C0012
 Client Name: Coyle, Greg
 Accession #: 001393
 Item Title: Culture smart!

Due Date: Apr 22, 2009
 Replacement \$: \$0.00
 Fine accrued: \$41.00
 # Notifications: 0
 etc...

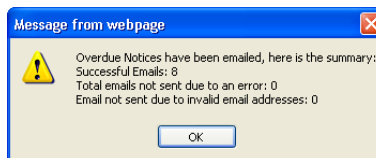
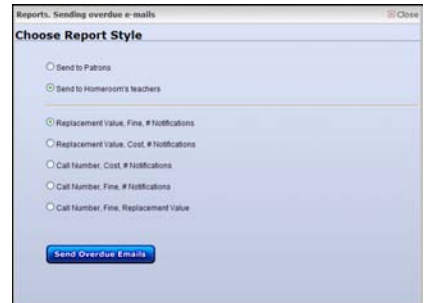
Email to Homeroom Contact

L4U Enterprise Training Library is listing that your homeroom has 9 items Overdue. The details of those overdue items are listed below:

Client Code: C0251
 Client Name: Bell, Taisia
 Accession #: 000096
 Item Title: Arthur's chicken pox.
 Due Date: Oct 28, 2009
 Replacement \$: \$0.00
 Fine accrued: \$0.00
 # Notifications: 0
 etc...

To email Overdue notices to Patrons:

1. Log into L4U Freedom, see “L4U Freedom Login” on page 66.
2. Click *Reports* from the *Freedom Toolbar*
3. Choose *Items Overdue Report*
4. Click *Continue*
5. Click *Send Overdue Emails*
6. Click *OK* at the confirmation dialog
7. Choose *Report Style*:
 - *Send to Patrons* or *Homeroom Email Address*
 - The example emails above had *Replacement Value, Fine, # of Notifications* option selected
8. Click *Send Overdue Emails*
9. A confirmation will appear providing a summary of successful emails, Click *OK*





Note: A single email will be sent to each homeroom email address. The email will contain a complete list of overdue for all individuals in the specified homeroom.

Item Status Report

The Item Status Report will produce a report based on the various Status's that exist in the library collection. Alternatively, if the desired Status isn't in the selection pop-up, the Status can be entered manually. The report can then be sorted by a variety of fields to produce the desired report. This process is the same as for the *Items Bibliographic Report* and is described in the next paragraph.

Items Bibliographic Report

The Item Bibliographic Report is a quick way to create reports for Authors, Titles, Subjects, Publishers and more. The report can then be sorted by key fields to produce the desired report. To create an Item Status or Bibliographic Report:

1. Log into L4U Freedom, see "L4U Freedom Login" on page 66.
2. Click *Reports*
3. Choose the *Items Bibliographic Report* and click *Continue*
4. Choose the *Report Options*
 - Select the desired fields to search and/or sort
 - Data Entry fields perform a Starts With search unless the search value starts with the L4U Wildcard, which is the @ symbol



5. Click *Generate Report* to produce the report
 - Click *Go Back* to return to Reports Home
6. The desired report will appear on screen
 - Use the drop down list to navigate to the other pages if more than one page is available.
 - *Reports Home* - returns to *Online Reports*
 - *Report Options* - returns to the current *Report Options* page.
 - *Back* - returns to the previous page
7. Print the Report using your internet browser's Print command

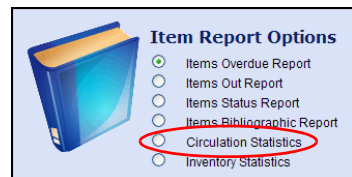
- Please consult the documentation or help files associated with your internet browser on how to Print

Items Bibliographic Report for May 30, 2011 at 8:59 PM			
Accession#	Status	Local Call Number	Title
019618	In	500.5 ASI	21st century in space, The
014096	In	520 DYE	Space
028379	In	520.21 STO	1001 facts about space
019458	In	629.4 GRA	Looking at space
019463	In	629.4 JOH	In space
019467	In	629.4 SUM	Earthling's guide to deep space, An
019468	In	629.4 TRO	Exploration of space
019469	In	629.43 WAL	Satellites and space probes
019473	In	629.44 YES	Amazing International Space Station, The
003239	In	629.442 BRA	International Space Station, The
029815	In	629.45 DYS	Space station science :

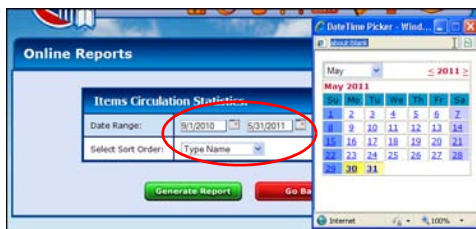
Circulation Statistics

Use this report to generate a list of annual circulation statistics by the Loan Types in your collection. The desired date range can be selected as well as the sort order. These statistics are maintained until a Month End process is performed or the Circulation Statistics are zeroed during a Year End. Both of these processes are usually controlled by the District Librarian in an Enterprise configuration. To create a Circulation Statistics Report:

1. Log into L4U Freedom, see “L4U Freedom Login” on page 66.
2. Click *Reports*
3. Choose *Circulation Statistics* and click *Continue*
4. Choose the *Report Options*
 - Use the Calendar pop-ups to select a Start Date and End Date if desired



- Select the Sort Order



- Click *Generate Report* to produce the report
 - Click *Go Back* to return to Reports Home
- The desired report will appear on screen
 - Use the drop down list to navigate to the other pages if more than one page is available.
 - *Reports Home* - returns to *Online Reports*
 - *Report Options* - returns to the current *Report Options* page.
 - *Back* - returns to the previous page
- Print the Report using your internet browser's Print command
 - Please consult the documentation or help files associated with your internet browser on how to Print

Items Circulation Statistics for May 31, 2011 at 9:56 AM for period from 9/1/2010 to 5/30/2011		
Type Code	Type Name	Total Circs
AB	Audio Book	165
AC	Audio Cassette/Disks	47
B	Biography	552
C	Childrens Books	1445
CD	Compact Disc	513
DVD	Direct Video Disk	3315
F	Fiction	4829
JF	Junior Fiction	727
J	Junior Non Fiction	10
KIT	Kit	255
M	Missionary stories	20
MUS	Music Department	16118
NF	Nonfiction	2286
P	Primary	362
SER	Serial	0
SPA	Spanish	1
VHS	Video Cassette	6
YA	Young Adult	231
Total Circulation:		30882

Inventory Statistics

These reports are used during the Inventory process. For more information on these Reports, please refer to the Inventory Chapter or more specifically, refer to "Inventory Reports" on page 166.

Patron Reports




There are a variety of Patron Reports available from within L4U Freedom. Patron lists by homeroom or by individual patron as well as circulation history and outstand-

ing fines and other charges are available. The format of these reports are built-in to L4U and derive the header from the library information stored in Library Profile. The different reports are listed below with their various options.

Patron List Report

1. Log into L4U Freedom, see “L4U Freedom Login” on page 66.
2. Click *Reports*
3. Click *Patron List Report*
4. Click *Continue*
5. Choose the Report Options
 - Auto-Search by Homeroom Code/Name or Client Code/Last Name is available if the appropriate option is checked.
 - Enter a portion of the Homeroom Code/Name or Client Code/Name.
 - Select the desired Homeroom or Client from the drop down list.
 - Specify the *Sort Order* from the drop down list.
 - Check *Print each Homeroom on a separate page* to have each homeroom print on separate page
6. Click *Continue*
7. The desired report will appear on screen
 - Use the drop down list to navigate to the other pages if more than one page is available
 - *Reports Home* - returns to *Online Reports*
 - *Report Options* - returns to the current *Report Options* page
 - *Back* - returns to the previous page
8. To Print All Pages with the selected Page Break Option, Click *Display All Pages*
9. Print the Report using your internet browser’s Print command

- Please consult the documentation or help files associated with your internet browser on how to Print

Patron List Sep 11, 2008 at 4:05 PM			
Highschool HR # 2			
	C0007 Strand, Donia	Monies Owning: \$0.00 # of Items Out: 0 # of Items O/D: 0 Credit: \$0.00	Message: No message
	C0017 Halverson, Joyce	Monies Owning: \$0.00 # of Items Out: 0 # of Items O/D: 0 Credit: \$0.00	Message: No message
Highschool Librarians			
	C0001 Messenger, Dawn	Monies Owning: \$0.00 # of Items Out: 0 # of Items O/D: 0 Credit: \$0.00	Message: No message

Patron Histories Report

- Log into L4U Freedom, see "L4U Freedom Login" on page 66.
- Click *Reports*
- Click *Patron Histories Report*
- Click *Continue*
- Choose the Report Options
 - Enter a portion of the Client Code or Last Name.
 - Select the desired Client from the drop down list.
 - Optionally enter the Starting Date & Ending Date or select from the popup calendar.
 - Specify the *Sort Order* from the drop down list.
- Click *Continue*
- The desired report will appear on screen
 - Use the drop down list to navigate to the other pages if more than one page is available.
 - Reports Home* - returns to *Online Reports*
 - Report Options* - returns to the current *Report Options* page.
 - Back* - returns to the previous page
- Print the Report using your internet browser's Print command

Client History Report Options	
Report on Specific Client:	C00 <input type="text"/> <small>If unsure of the Client Code - enter the first few letters</small>
Date Range:	C00 <input type="text"/> <input type="text"/> (All Dates by Default)
Select Sort Order:	C0004 <input type="text"/>

- Please consult the documentation or help files associated with your internet browser on how to Print

Displaying page 1 of 2, Page: 1 Display All Pages					
Reports Home Report Options Back					
Clients History for Jim Scanlon for the all account activities period Generated on Nov 23, 2008 at 2:32 PM					
C0006, L4U Demo Library Staff					
Title	Call#	Accession#	Date Out	Returned	Level
Mastering Microsoft Office 97	TR 001.64 MOS	001392	9/7/2007	Item Out	Intermediate
ClarisWorks for terrified teachers	TR 001.64 ROS	021806	9/7/2007	Item Out	Elementary
ClarisWorks for terrified teachers	TR 001.64 ROS	021805	9/7/2007	Item Out	Elementary
PalmPilot and palm organizers !	TR 004.165 SAL	001017	9/7/2007	Item Out	Intermediate
Internet for teachers, The	TR 004.6 WIL	000825	9/7/2007	Item Out	Intermediate
Internet field trips	TR 004.67 GAR	001455	9/7/2007	Item Out	RL: 4.9

Patron Fines & Other Charges Report

Use this report to produce an invoice or receipt for fines or other charges. Select the appropriate option (or both if applicable) and the desired patron or homeroom. The report will list outstanding items still accruing fines, fines (paid or outstanding) and other charges (paid or outstanding) and waived fines or charges.

1. Log into L4U Freedom, see "L4U Freedom Login" on page 66.
2. Click *Reports*
3. Click *Patron Fines/Other Charges Report*
4. Click *Continue*
5. Click *Other Charges* to include any outstanding Other Charges
6. Click *Fines* to include Fines & Select what *Type of Fines* to report

Client Fines/Other Charges Report Options

☐ Other Charges
 ☐ Fines

Outstanding Fines

--Select Type of Fines--
 Outstanding Fines
 Active Fines
 Outstanding and Active Fines

[List All Clients](#)
[List Clients from a Specific Homeroom](#)
[Report on Specific Client](#)

Select Sort Order: Homeroom

Print each Homeroom on a separate page ☒
 Display zero balances rows ☒

- *Outstanding Fines* are fines charged on overdue items that have been returned.
- *Active Fines* is the amount owing on items currently overdue and not yet returned.

- *Outstanding and Active Fines* are both of the above.
- Choose the Report Options
 - Auto-Search by Client Code/Client Last Name or Homeroom Code/Homeroom Name is available if the appropriate option is checked.
 - Enter a portion of the Client Code/Client Name or Homeroom Code/Homeroom Name.
 - Select the desired Client or Homeroom from the drop down list.
 - Specify the *Sort Order* from the drop down list.
 - Check *Print each Homeroom on a separate page* to have each homeroom print on separate page.
 - Check *Display zero balances rows* to report on items with zero balances.
 - Click *Continue*
 - The desired report will appear on screen
 - Use the drop down list to navigate to the other pages if more than one page is available
 - *Reports Home* - returns to *Online Reports*
 - *Report Options* - returns to the current *Report Options* page
 - *Back* - returns to the previous page
 - To Print All Pages with the selected Page Break Option, Click *Display All Pages*
 - Print the Report using your internet browser's Print command
 - Please consult the documentation or help files associated with your internet browser on how to Print

Client Fines/Other Charges Report Options

☒ Other Charges
 ☒ Fines
 Outstanding and Active Fines ▼

List All Clients ☐
 List Clients from a Specific Homeroom ☐
 Report on Specific Client ☐
 Select Sort Order:

If unsure of the Homeroom Code - enter the first few letters

Fines/Other Charges Report			
Generated on Nov 23, 2008 at 2:27 PM			
Client Info	Item Info	Circ Info	Charge Info
L4U Demo Library Staff			
Scanlon, Jim C0006	Title: Multimedia authoring workshop with Director 5, The Call #: TR 006.6 HAR Accession #: 000824	Return Date: 11/23/2008	Fines Charged: \$25.10
Scanlon, Jim C0006	Title: Internet for teachers, The Call #: TR 004.6 WIL Accession #: 000825	Due Date: 12/6/2007 Days Overdue: 251	Charge/day: \$0.10 Active Fines: \$25.10
Scanlon, Jim C0006	Title: Complete idiot's guide to creating an HTML 4 Web page, The Call #: TR 005.7 COM Accession #: 000858	Due Date: 12/6/2007 Days Overdue: 251	Charge/day: \$0.10 Active Fines: \$25.10

A

- Acquisitions
 - Copy to Acquisitions 108
 - Data Entry Tips & Tricks 81
 - Delete 102
 - Description 89
 - Duplicate 101
 - Field Definitions 84
 - Labels 103
 - Modifying 101
 - Multi-Dupe 101
 - Overview 80
 - Posting 104
 - Search 101
 - Subjects 89
 - Toolbar 80
- Active Directory
 - Allow Auto Login 5
 - Allow Network User Name 21
 - See Also* L4U User Manual
- Added Entries
 - Entering 90
- Advanced Bookings
 - See Also* Reserves
 - Web Privileges 27
- Advanced Circulation,
 - See* Circulation, Freedom
- Advanced Query
 - See* Query
- Alerts
 - Circulation 152
 - Fine Warnings 142
 - Pay Fines 142
- Allow Auto Login 5
- Authorities
 - Display Format in iPAC 11
 - Quick Sort 112
- Auto Circulation 141
- Auto Login 5

B

- Barcodes
 - Temporary 154
- Basic Circulation,
 - See* Circulation, Basic
- Batch Changes
 - See* Global Changes
- Book Ratings
 - See* Ratings

- Bookbag 55
 - Adding items 55
 - Deleting items 57
 - Emptying 57
 - Placing a booking 70
 - Send Bookbag by Email 71
 - Viewing 57
- Bookcover
 - Acquisitions 93
 - Library File 107
- Building Queries 116

C

- Cast a ballot 58
- Cataloging Materials,
 - See* Acquisitions
- Categorizing Clients 134
- CheckMARC
 - Cataloging with 94
 - Saving a record 97
 - Selecting a record from 95
 - Setting up 94
- CircTime Override 130, 142
- Circulation On the Web
 - Enabling 27
 - via Freedom Circulation 136
 - via My Profile 73
- Circulation, Basic 73
 - Checking Items In 75
 - Circ Period Hierarchy 76
 - Circulating to Other Clients 74
 - Circulation Out 73
 - Circulation Warnings 76
- Circulation, Freedom
 - Alerts 152
 - Applying Credits 151
 - Auto Mode 141
 - Checking Items In 138
 - Checking Items Out 137
 - Circ Period Hierarchy 154
 - CircTime Override 142
 - Circulation Modes 140
 - Client Management 128
 - Controls 141
 - Deleting Reserves 148
 - Disable Fines 142
 - Display Client Picture 142
 - Fine History 151
 - Fine Payment 148
 - Fine Warning On 142
 - Fines
 - View Active Fines 150
 - View Returned Fines 149
 - Waive Fines 150
 - Full Circulation 136
 - Global Due Date
 - Grace Day 142
 - Items Out for Clients 143
 - Locating Clients and Items 138
 - Lost Items 144
 - Options 140
 - Other Charges
 - Adding 151
 - Payments 150
 - Total Charges 150
 - Waiving 151
 - Pay Fines Alert 142
 - Query Icon 139
 - Renewals 145
 - Reserves
 - See* Reserves
 - Setting Web Privileges 27
 - Status Check 141
 - Toolbar 139
- Clear All Selections 102
- Clients 127
 - CircTime Override 130
 - Creating 129
 - Entering messages 131
 - Fines 130
 - Fines History 132
 - Histories
 - via Freedom 132
 - via My Profile 72
 - Items Out 131, 143
 - Locating 138
 - Max Items Out 130
 - Modifying 132
 - Network Username 131
 - Quick Search 112
 - Quick Sort 112
 - Reports 176
 - Client List 177
 - Fines & Other Charges 179
 - Histories 178
 - Items Out 170
 - Items Overdue 170
 - Search Stations 3
 - Internet Browser 3
 - LAN 3
 - Suspending 130
 - Type 130
- Configuring
 - iPAC & Freedom 1
- Control Files
 - Media 51
 - Quick Sort 112
- Controls
 - Circulation 141

- Copy Cataloging from Library File
 - Using ISBN 83
 - Using Title 83
- Copy Management
 - Display in iPAC 13
- Creating
 - Web Links 17

D

- Dashboard
 - Freedom 67
- Data Entry
 - Added Entries 90
 - Clients 127
 - Description, Materials 89
 - Entering Materials 82
 - Field Definitions 84
 - Subjects 89
 - With CheckMARC 94
- Data Management 111
- Default Location, Global 20
- Delete iPAC Sessions 27
- Deleting
 - From Acquisitions 102
 - From Bookbag 57
 - Items 115
 - Records 115
- Descriptions
 - Entering 89
- Details Balloons
 - In iPAC
 - Set as Default 23
 - View 47
- Diacritics
 - Enabling for iPAC 5
- Disable
 - Fines 142
- Display
 - Format in iPAC
 - as Authority 11
 - as Item 11
- Display Search Suggestions
 - In iPAC
 - Set as Default 23
 - View 46
- Duplicate Items 101

E

- Easy Search
 - In iPAC
 - On Every Page 23
 - Set as Default 20
- eBooks
 - See Resources, Adding*

- Elections
 - Casting a ballot 58–59
 - Tabulating Results 60
- Email
 - Bookbag Contents 71
 - Overdue Notices 172
- Enterprise, L4U
 - See Also* Enterprise Administrator Manual
- eResource
 - See Resources, Adding*
- Exact Matching 12
- EZ Labels
 - See Labels*

F

- Facebook
 - See Social Network Links*
- Federated Search
 - Configure 17
 - Using 52
- Field Definitions 84
- Find
 - See Searches*
- Fines
 - Alerts 142
 - Apply Credits 151
 - Disable 142
 - Fines History 132, 151
 - For Lost Items 144
 - Invoices/Receipts 179
 - Payment 148
 - View Active Fines 150
 - View Returned Fines 149
 - Viewing 130
 - Waive Fines 150
- Freedom
 - Dashboard 67
 - Login 66
 - Search Results Display
 - Customize 31
 - Toolbar 67
- Freedom Circulation,
 - See Circulation, Freedom*
- Freedom Dashboard v

G

- General Material Designation
 - See Media*
- Global Changes 124
- Global Due Date 155
- Global Return Date
 - See Global Due Date*
- Grace Days 142

- Group Login Enabling 28

H

- Help
 - iPAC/Freedom iv
 - Navigating
 - Freedom iv
 - iPAC 36
 - Tips and Tricks v
- Highlight Search Criteria
 - In iPAC
 - Set as Default 22
 - View 46
- Histories
 - Client Histories
 - via Freedom 132
 - via My Profile 72
 - Fines History 132
- Holds
 - See Reserves*
- Homerooms 134
 - iPAC Search Results Display
 - Customization 30
 - Web Privileges
 - Configuring 27
- Hyperlinks 12

I

- Import
 - MARC Records 97
- Internet Public Access Catalog
 - See iPAC*
- IP Address
 - Identifying 4

iPAC 35

- Bookbag 55
- Combining Search Terms 14
- Configuration Options 4–5
- Configuring 2
- Connection Types 3
- Copies View 13
- Creating web links 17
- Enabling 2
- Help iv, vii
- Login 64
- Maximum Hits 6
- My History 72
- My Profile 67
- Navigating 36
- New items 12
- Picture Search 15
- Placing Reserves 70
- Privileges 27
- Publishing 7
- Ratings
- Related Searches 50
- Reserves 70
- Search Defaults 14
- Search Results Display
 - Configure 18
 - Customize
 - Homeroom 30
 - Library 24
 - Customizing List View 23
 - Options 45–47
- Search Techniques 37
- Searches
 - Advanced 43
 - by Author 40
 - by Editor or Illustrator 40
 - by Series 40
 - by Subject 39
 - by Title 40
 - Multi-Seek 42
 - SoundsLike 39
 - Topic Search 40
 - Use Exact Matching 12
- Server log 6
- Setting Up 1
- Skins
 - Default iPAC Skin 20
 - Session iPAC Skin 47
- Social Network Links 50
- Toolbar 37
- Topic Search 40
- Viewing
 - Item detail 49
 - MARC record 51
 - New Items 53
 - Reserves 71

- via Freedom 147

- via My Profile 70

Results

- as Bibliographic 45
- as Details 45
- as List 45
- Details Balloons 47
- Highlight Search Criteria 46
- Perform Similar Searches 46
- Spell Check Search
 - Criteria 46

- Voting 58

- Web Links 54

iPAC and Freedom Customization 9

iPAC Server

- Configuration Settings 7
- Publishing from Client 7

Item Detail

- In CheckMARC 97
- Viewing 49

Item Display Format in iPAC 11

Items

- Lost 144
- View All 113

Items Out

- Per Client 143

J-K

Keywords

- Searches from iPAC 39

L

L4U Enterprise

- See Also* Enterprise Administrator
- Manual

Labels 103

- Library File 109

LAN Client 3

Launching

- iPAC 2

Library File 106

- Clear All Selections 102
- Copy to Acquisitions 108
- Delete 115
- Global Changes 124
- Mark Items 114
- Quick Search 112
- Quick Sort 112
- Subset 114
- View All 113

Limited Circulation,

- See* Circulation, Basic

List Searches

- For Weeding 115

Loan Period Hierarchy 76, 154

Local Area Network Client 3

Locating

- Clients 138

Log Out 77

Login

- Forced Login 20
- Freedom 66
- Group/Generic 28
- iPAC 64
- Use Active Directory 21
- Web Privileges 27

Logo

- Location, in iPAC 8
- No Conversion 9

Logs

- iPAC Server 6

Lost Items 144

M-N

Maintaining

- Library Items 111

MARC Records

- Import 97
- View in iPAC 51

Mark Items 114

Maximum

- Hits 6
- Items Out 130

Media

- Creating Types 51

Messages

- Creating 15
- Editing Headers 16
- In Client Records 131
- Viewing 16

Modifying

- Acquisitions 101
- Clients 132
- iPAC Privileges
 - by Homeroom 28–29
 - Single Client 31
- Item records 106
- Reserves 159
- Web Privileges
 - By Homeroom 27, 30

Multi-Homing 8

Multi-Seek 42

My Profile 67

- Basic Circulation 73
- Items Out 68
- My History 72
- Renewals 68
- Reserves 70
- Send Bookbag by Email 71

Navigating

- Freedom iv
- iPAC 36
- Library File 106
- Network User Name 21
- Network Username 131
- New items
 - Setting Days New 12
 - Viewing in iPAC 53
- Novel Sets
 - See Duplicate Items*

O

- Options
 - For Circulation 140
- Orders
 - Info Tab 91
- Other Charges
 - Adding 151
 - Invoices/Receipts 179
 - Paying 150
 - Viewing 130, 150
 - Waiving 151

P

- Passwords
 - iPAC 30, 131
- Patrons 127
 - Searching 35
 - See Also Clients*
- Payment
 - Fines 148
- Perform Similar Searches
 - In iPAC
 - View 46
- Picture Search 15, 42
- PIN
 - See Passwords*
- Placing Reserves 146
- Points
 - Viewing 130
- Posting 104
 - Options 105
- Power Search
 - See Quick Search*
- Profile
 - Freedom Profile 67
 - My Profile 65
- Public Access Catalog 35
 - See iPAC*
- Purchasing
 - Entering PO Number 91

Q

- Query
 - Building 116
 - iPAC Default - Easy or Quick 44
 - Quick Search 112
- Quick Search
 - Performing 112

R

- Ratings
 - Clear 107, 164
 - Enable Item Ratings 10
 - Multiple via Group Login 28
 - Placing 49
- Rebuild Cutter or Call Number 81
- Records
 - Delete 115
 - Mark Items 114
 - Subsets 114
 - Unmark Items 114
 - View All 113
- Renewals
 - From Freedom Circulation 145
 - From My Profile 68
 - One Click 144
- Report Packs 180
- Reports 169
 - Circulation Statistics 175
 - Client Fines & Other Charges 179
 - Client Histories 178
 - Client List 177
 - Item Bibliographic 174
 - Item Status 174
 - Items Out & Overdue 170
 - Overdue by Email 172
- Reserves 157, 161
 - From Freedom Circulation 146
 - From My Profile 70
 - On a Bookbag 70
 - One Click 147
 - Viewing/Modifying 159
- Resources
 - Adding 92

S

- Saved Queries 116
- Search Options
 - iPAC - Authority vs Item 9
- Search Results
 - Viewing iPAC 44
- Search Results Display
 - Authority vs. Item Display in iPAC 11
 - Customize for Freedom, Library

File

- Customize Display, Reserves
 - Customize Display 31
 - Customize for iPAC 18
 - Sorting 48
- Search Stations, Public 35
- Searches
 - iPAC
 - See Also* iPAC, Searches
 - Acquisitions 101
 - Building Multi Level 116
 - For Clients 138
 - Library File 116
 - List Search 115
 - Picture search 15
 - Query 116
 - Quick Search 112
 - Topic Search 119
- Selecting Items
 - Select All 103, 114
- Similar Searches
 - In iPAC
 - set as Default 22
- Skins
 - See* iPAC Skins
- Social Network Links
 - Enable 10
 - View 50
- Sorting
 - iPAC Search Results 48
 - Quick Sort 112
- SoundsLike Search 39
- Spell Check Search Criteria
 - In iPAC
 - Set as Default 22
 - View 46
- Status Check
 - Freedom Circulation 141
- Subjects
 - Adding to a Record 89
 - Searching via iPAC 39
- Subsets 114
- Suspending Clients 130

T

- Temporary barcodes 154
- Toolbar
 - Acquisitions 80
 - Circulation 139
 - Freedom 67
 - iPAC 37

Topic Search

Create 121

Editing Topics 123

Managing 119

Using 40

Twitter

See Social Network Links

Types

iPAC Connections 3

Weeding

List Search 115

Wide Area Search

See Wide Area Search in the *L4U**User Manual v2.3*

U

Union Catalog Considerations

Acquisitions 82

Circulation 136, 158

Client Entry 128

Data Entry 82

Unmark Items 114

URL's

Adding to a Record 92

User Fields 89

V

View All Records 113

Viewing

Bookbag 57

CheckMARC Records 97

iPAC Search Results 44

Item Detail 49

Items Out for Clients 143

MARC record in iPAC 51

New Items 53

Reserve Management 159

Reserve via iPAC 71

Reserve via My Profile 70

Reserves via Freedom 147

Subsets 114

Web links in iPAC 54

Voting

From iPAC 59

W

Web Administration 63

Web Links

Adding a New Site 17

iPAC 54

Web Privileges

Setup 27

Web Server

See Configuring the iPAC & Freedom

Web Sites

Adding 17

