Concourse®

QuickStart Guide

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Table Of Contents

Introduction

Chapter 1: Getting Started

Chapter 2: Setting Up

Chapter 3: Cataloging

Chapter 4: Patrons

Chapter 5: Circulation

Chapter 6: Searching

Chapter 7: Reports

Chapter 8: Additional Features

Chapter 9: OPAC

Introduction

Welcome to the Concourse QuickStart Guide! This guide is designed for first-time Concourse users. Reading the guide from cover to cover is suggested because each chapter builds on previous chapters. Only the *essential* elements for using the product are covered in this guide; please refer to the Concourse User's Guide or Help files for more detailed information about all available features.

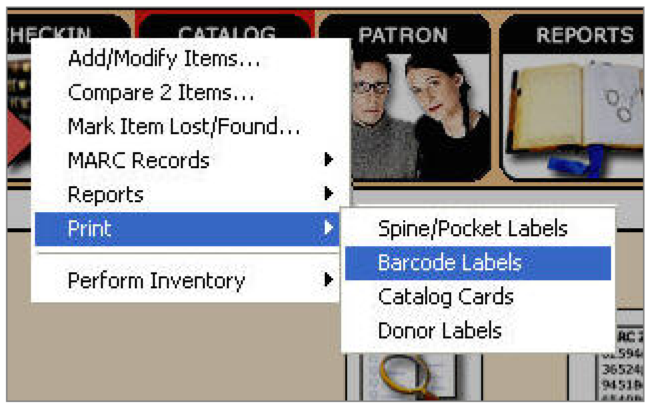
Prerequisites

Before you begin, there are several key terms and concepts you need to understand to help you operate a Windows® program effectively. If you are familiar with these terms and concepts, proceed to **Chapter 1: Getting Started**.

- **Click**, **double-click**, and **right-click** – You perform clicks and double-clicks with the primary mouse button, while you perform right-clicks with the secondary mouse button. You can configure your mouse for left-handed or right-handed use, but doing so will affect the button configuration. On a right-handed mouse, the primary button is on the left and the secondary button is on the right; the left-hand mouse is reversed.
- **Drag and drop** – You can use this feature to move objects in most Windows programs or icons on your desktop. To move a window or icon, click and hold the window's title bar or the icon, drag the object to its new location, and release the mouse button to drop the object.
- **Command buttons** – These are the buttons that you see on dialog boxes, such as the **OK** and **Cancel** buttons. This guide refers to these by their names and formats them in **bold**. Click to use these buttons.
- **Highlight** – You can highlight the contents of fields, cells in a grid, or items in a list. If you need to change the information in a field that already contains text, click and hold the primary mouse button inside the field, just before the text, and drag across the text. When you have selected the text you want to change, release the mouse button, and then either begin typing to overwrite the selected text or press **Delete** to clear the text before typing. You can click a grid cell or list item to select it and then perform an action on an item by choosing a menu command, clicking a button, copying text, etc.
- **Menu Commands** – The items or options available on menus or submenus are called commands. This document formats menu and submenu commands with a pipe (**|**) in between. For example, when the guide tells you how to open the Concourse Help file from the menu bar, it is written as, "Click **Help | Help Topics** from Concourse's menu bar."
- **Menus** – Most programs, including Concourse, have a menu bar across the top of the window. Click one of the words to open a drop-down menu. Once the menu is open, you can click to select any command in the list. This document formats all menus, submenus, and menu commands in **bold**.

- **Select** – To select any menu option or command button on a dialog box, you can click it. If you prefer, you may also have the option of using the **Tab** key to move through the buttons and radio buttons on a dialog box. When the option you need to select has a dotted line around it, press **Enter** to select it.

- **Submenus** – When you are viewing a menu, a command option may have an arrow to the right; this means that you can open a submenu, or secondary menu within a main menu. Either click on the menu command or leave your cursor over it for a few seconds to view the submenu. Once the submenu is open, you can click to select any command on it.



- **Key sequences** – A key sequence is a combination of keys pressed together; for example **Ctrl + C** means to press and hold the **Ctrl** key while pressing **C** in order to copy text.
- **Insert** – When completing the fields in a dialog box, you need to place your cursor in a field to begin typing. To do this, simply click in the field. You will see a blinking bar display in the field; this is your cursor, which tells you that you can begin typing.
- **Tab/Shift keys** – Use the **Tab** key to move to the next field/option in a dialog box and the key sequence **Shift + Tab** to move to the previous field/option.
- **Num Lock key** – If you have a numeric pad on your keyboard, it includes a **Num Lock** key. Above the numeric pad, you will find a **Num Lock** label with an indicator light. If the light is on, you can use the number keys in the key pad; otherwise, the numbers take the function that is listed on the bottom of the key, such as **Home**, **End**, **PgUp**, **PgDn**, or the arrow keys. Press the **Num Lock** key to turn this feature on or off.
- **Check boxes** – These are boxes that have two states: on or off. Change the state by clicking the check box to select or deselect it. Typically, if there is a group of check boxes, you are allowed to enable more than one choice.
- **Radio buttons** – Like check boxes, these are circles that have two states: on and off. Typically, if you have a grouping of radio buttons, you are allowed to select only one. Clicking one selects that option but deselects the others in the group.

- **Cut and Paste** – These are the two most common edit options. The quickest way to perform these functions is to use the keyboard shortcuts. Highlight the text you want to copy, press **Ctrl + C**, and then place your cursor in another location and press **Ctrl + V** to paste the copied text. These options are also available from the **Edit** menu or the right-click shortcut menu.

Installation

Concourse must be installed on your computer before you can apply any of the concepts in this guide. Please refer to the **Installing Concourse: Single User** (or **Network User**) document for instructions about installing from the CD. If you are installing from the Web, instructions are available from the **Download Software** page. Contact Book Systems' Technical Support Staff if you need assistance.

Additional Resources

Training – Book Systems, Inc. offers training courses for all of its products. Please contact your Account Manager at **sales@booksys.com** for more information about training classes.

User's Guide – You can open the Concourse User's Guide quickly from the **Help** menu. Click **Help | User Guide** from Concourse's menu bar to open the PDF file in Adobe® Acrobat® Reader®.

Product Help File – Concourse includes complete documentation in the Help files. To open Help, click **Help | Help Topics** from Concourse's menu bar or press **F1**.

Chapter 1: Getting Started

Starting Concourse

After installation, you can open Concourse from your Windows **Start** menu or by double-clicking the **Concourse** icon on your desktop.

Logging In

When you run Concourse, you may see a splash screen image. You can wait a few seconds for it to close or press any key on the keyboard to dismiss it. The **Concourse Login** dialog box displays.

New users should enter the default log in name (**MLS**) and password (**SETUP**) to log in. After creating additional worker records, disable this default to maintain database security.

1. Enter your log in name and password in the corresponding fields.
2. If applicable, click the **Location** drop-down button, and click again to select the appropriate location.

   Note: This drop-down button only displays if you have locations configured, based on your system settings.

3. Click **OK** to continue.
4. If you entered all information correctly, you are now logged in to Concourse. Otherwise, double-check your **Login Name** and **Password** and try to log in again.
5. If enabled, the **Tip of the Day** dialog box, which provides helpful hints about various features, displays. To disable this feature, click to deselect the **Show Tips on Login** check box in the bottom left corner. Click **Close** to dismiss the dialog box. You can reopen this feature at any time by clicking **Help | Tip of the Day** from Concourse's menu bar.

Updating Settings

First-time users need to configure Concourse to work with your library system before cataloging any item records or adding patron records. You can use the **Configuration Setup** dialog box to specify settings (if you have the *Set Configuration* worker permission enabled) or directly edit your **Settings** file; the dialog box allows you to specify most advanced configurations more quickly than the **Settings** file.

Note: This process should only have to be done one time when you first begin using Concourse. If any major organizational changes occur that affect your library configuration, please contact Book Systems' Technical Support Staff to learn how to convert your library system to a new configuration.

1. Click **File | Maintenance | Configuration Setup...** from Concourse's menu bar. Concourse prompts you to log off.

2. Click **Yes** to open the **Configuration Setup** dialog box.
3. In the **Circulation Parameters** section, click to enable or disable check boxes as needed:

    - **Auto Review on Patron Lookup** – Whenever you lookup a patron in the **Circulation Desk** dialog box, Concourse automatically displays the patron's fines, checked out items, and reserved items; otherwise, you would have to click the **Review** button to see this information.
    - **Auto Switch Patron** – If you have a patron loaded and you accidentally enter another patron's barcode instead of an item barcode, Concourse switches that second patron's barcode to the appropriate field as if you had typed the patron barcode into the appropriate edit box.

      Important! If your item and patron barcodes are similar, for instance if both are eight-digit and use zeros, then this feature will not work as described; instead, entering the patron's barcode in the **Item Barcode** field will assume that you are checking another item out to the patron already loaded in the **Circulation Desk** dialog box.

    - **Don't Display Message Button** – Enabling this option disables the **Messages** button on your **Add/Modify Patrons** and **Items** dialog boxes and removes the **Msgs…** button altogether from the **Circulation Desk** and **Circulation -- Check In** dialog boxes.
    - **Default to Patron Name in Check Out** – Whenever you open the **Circulation Desk** dialog box, the cursor automatically displays in the **Patron Name** field.
    - **Print Circulation Grid** – When you print from the **Circulation Desk** dialog box, this option prints the full circulation grid as it displays onscreen, including your columns and sorts.

4. In the **Database Parameters** section, click the check boxes as needed to specify the type of Call Numbers you use when adding/importing item records:

    Note: By default, the database is set up to use Dewey Call Numbers, but you can also select either of the options described below.

    - **Use of L of C Call Numbers** – This option enables the Library of Congress Call Number system.
    - **Use LAUSD Call Format** – This option enables LAUSD Call Numbers.

5. In the **Maximum Barcode Lengths** section, use the check boxes and fields as applicable to establish barcode length:

    - **Use Item Barcodes** – Enabling this option separates barcodes from your item IDs. Enter the length of your barcodes in the **Item Barcode Length:** field.
    - **Use Patron Barcodes** – Enabling this option separates barcodes from your patron IDs. Enter the length of your barcodes in the **Patron Barcode Length:** field.

6. In the **MARC Record Parameters** section, click to enable or disable options related to importing/exporting MARC records:

    - **Ignore Study Prgms on Import** – When importing from another library or database, you may choose to ignore any study program data contained in the imported records.
    - **eZhost Item Status Export** – When enabled, eZhost exports the item status in its MARC records.

      Note: This option is only applicable to customers who have eZhost.

    - **Clean Tags on Import** – Selecting this option tells Concourse to clean the specified MARC tags whenever you import records into your database.
    - **Export Imported Records** – With this enabled, you can export the original MARC record of an imported item. This will exclude changes you might have made since import, but includes any custom or rarely-used fields and subfields that were in the original.

7. In the **Display Parameters** section, use the check boxes and drop-down button to customize the look and feel of your Concourse:

    - **Display Worker's Name** – This option displays the current worker's name in the title bar running across the top of Concourse.
    - **Modeless Authority Reports** – If you edit your authority records and then save them, you can move on to another activity in Concourse.
    - **Navigation:** – This drop-down list contains the names of all available Navigator GUIs in Concourse. Click the drop-down button, and click again to make a selection.

8. In the **Patron Parameters** section, click to enable or disable patron options:

    - **Replace Marital Status with Grade Level** – If you are working in a school library, rather than a public or church library, you can change your patron forms to say "Grade Level" instead of "Marital Status" for all applicable fields.
    - **Print Name on Address Label: Last, First** – This option displays the patron's name (last name, first name) on printed address labels.

9. In the **Cataloging Parameters** section, use the check boxes and field to set up options for item records:

    - **Supply default Purchase Date** – When you import records into Concourse, selecting this option will add today's date as the default purchase date.
    - **Uppercase Call Numbers** – Whenever you enter a Call Number into an item's record, it displays in uppercase letters, regardless of whether you imported the record or entered it yourself.
    - **Uppercase Subject Headings** – An item's subject headings display entirely in all caps.
    - **Uppercase Analytics** – The information in an item's analytics fields display in all caps.
    - **Display Gift Notes** – Select this option to display the **Donor**, **In Honor of**, and **In Memory of** fields on your catalog cards.

- **Suppress Call # Generation** – Selecting this option disables the default feature that calculates a Call Number cutter (from the author's name or title) when importing MARC records that have no Call Number information already. If you *do* want Concourse to generate Call Numbers, leave the check box deselected, and simply enter the length Concourse should use to assign numbers in the **Call # Derive Length:** field.

  Note: This option applies only for Dewey Call Numbers, not Library of Congress.

- **Ctrl-N Recalls Call # Fields** – When this option is selected, pressing **Ctrl + N** automatically inserts the last displayed Call Number in a **Call Number** field.
- **Convert from MARC-8 to Latin1** – During an import or export, this option converts MARC records from MARC-8 to Latin1 format.

  Note: If MARC records contain special characters not used in the English language, converting to Latin1 displays the information in a readable format.

10. Once you have completed your changes, click **Commit Changes** to save your settings. Otherwise, click **Cancel**.
11. If you clicked **Commit Changes**, the **Enter Password** dialog box opens where a worker with the *Set Configuration* permission enabled must confirm the changes. Enter your name and password in the appropriate fields, and click **OK**. The dialog boxes close and your changes are saved.
12. Click **File | Login** to open the **Concourse Login** and return to your Concourse tasks.

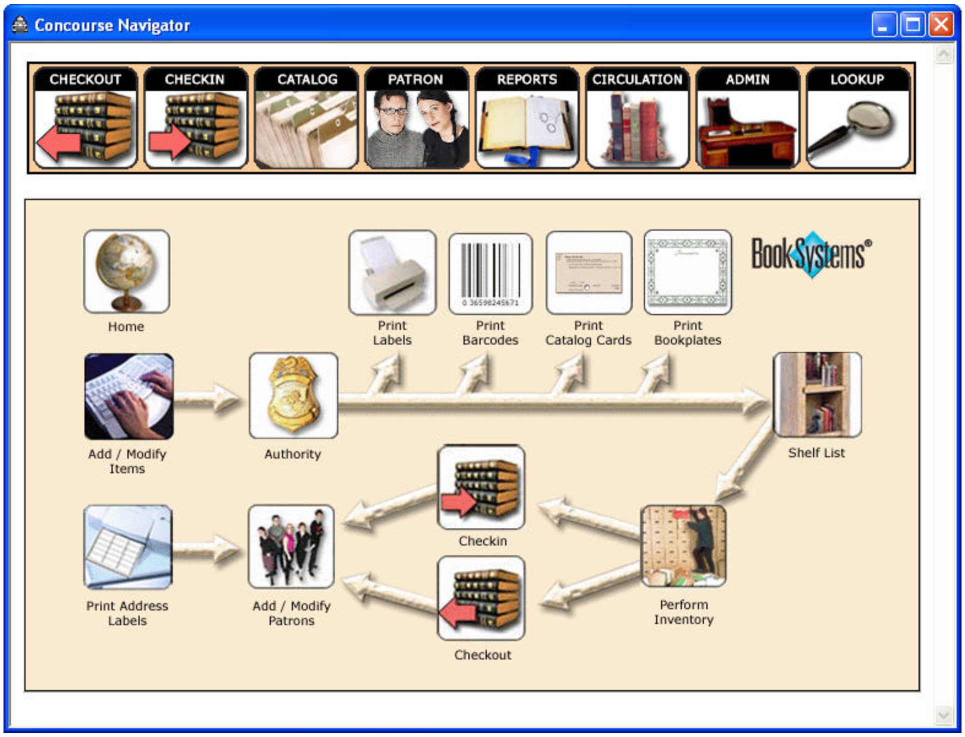
Getting Around in Concourse

To perform tasks in Concourse, you can use the **Concourse Navigator**, which contains the **Navigator Toolbar** across the top with a flow chart of buttons beneath it. Options are also available from Concourse's menu bar and toolbar.

Steps in this guide use the default **Concourse Navigator** where possible; some features are only accessible from the menu bar. The following sections describe the **Concourse Navigator** in detail and then briefly explain the menu bar and toolbar options.

Concourse Navigator

After closing the **Tip of the Day** dialog box, you see the **Concourse Navigator** with the **Navigator Toolbar** across the top and the **Home** flow chart beneath it.



The **Navigator Toolbar** is a row of eight buttons, where the **CHECKOUT** and **CHECKIN** buttons open dialog boxes for you to circulate the materials in your library and the remaining six buttons open flow charts beneath the toolbar.

The **Home** flow chart (pictured in the image above) displays beneath the **Navigator Toolbar** by default and contains various buttons in a diagram pattern that suggests one way of organizing library tasks. The buttons on this flow chart allow you to quickly access features. For example, you can click the **Shelf List** button to create a **Shelf List** report, and you can click the **Authority** button to display a menu listing all authority options.

When you click the **CATALOG**, **PATRON**, **REPORTS**, **CIRCULATION**, **ADMIN**, or **LOOKUP** button on the **Navigator Toolbar**, a red border displays around that button, and the related flow chart displays beneath it. Each of these flow charts suggests a way to organize the library tasks associated with the **Navigator Toolbar** button you currently have selected; these flow charts also contain a **Home** button so you can return to the **Home** flow chart at any time. To access a drop-down menu for any button on the **Navigator Toolbar**, click the *text*, rather than the image, on that button.

Some of the options accessible via the **Concourse Navigator** are also accessible through the menu bar at the top of the window or the toolbar which displays on the right side of the window by default (discussed later in this chapter), but the flow charts are not available via the toolbar or the classic GUI options.

Note: For information about changing the interface to one of the classic GUI options, see the “Customize Concourse” section in the Concourse User’s Guide or the **Changing the GUI Graphic** topic in the Help files.

CATALOG

This flow chart includes buttons for adding and modifying items, importing (requires license) and exporting MARC records (requires Level 4 Concourse license or Concourse Pro), marking items lost/found, comparing items (only available in regular Concourse), performing inventory, and printing.

PATRON

This flow chart provides access to various features, such as setting up patron records, **P-Link** (requires P-Link license), creating and printing form letters (requires Level 3 Concourse license or higher), generating patron reports (requires Level 2 Concourse license or higher), and more.

REPORTS

This flow chart allows you to run various reports in Concourse. You can click the **Reports** button to view a shortcut menu with *all* reporting options, or you can click the other buttons to open a specific report or shortcut menu of reports in a particular category, such as **Circulation Reports** (availability of reports depends on your level of Concourse and what additional licenses you may have).

CIRCULATION

This flow chart includes buttons to set up the **Due Date Calendar**, open the check in and check out dialog boxes, and generate a **Patrons with Items** report (all three features require a Level 3 Concourse license or higher). You can also review items.

Note: You can also click the **CHECKOUT** button directly from the **Navigator Toolbar** to open the **Circulation Desk** dialog box or the **CHECKIN** button to open the **Circulation -- Check In** dialog box.

ADMIN

This flow chart lets you add/modify item and patron classes, edit worker records, review history, and perform maintenance activities. You can click the **Admin** button to view all options or click another button to begin a task or view a related shortcut menu.

LOOKUP

This flow chart allows you to access the following search options: **Easy Word**, **Expert**, **Study Programs**, and **Barcode**. You can either click the related button or click **Search** to view a shortcut menu with all the options.

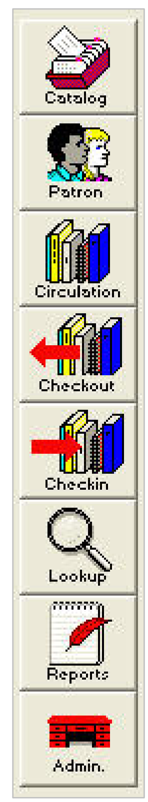
Concourse Menu Bar

Concourse's menu bar consists of eight menus.

The **Searching**, **Activities**, and **Reports** menus provide access to functions you can also perform from the **Concourse Navigator**. The following menus provide some additional features:

- **File** – contains many Windows-standard functions, in addition to log in/out, **Receipt Setup**, and database maintenance features.
- **Edit** – contains all Windows-standard edit functions (**Undo**, **Cut**, **Copy**, and **Paste**) as well as item/patron record edit functions, options for checking spelling and changing case, shortcut key edits, system messages, and e-mail settings.
- **Window** – contains multi-window organizational features, toolbar and status bar on/off toggles, and a note feature that allows you to add yellow sticky notes to your Concourse workspace.
- **Help** – gives you access to various types of documentation, such as the **Help Topics**, the **QuickStart Guide** and **User's Guide** in PDF format, the **Tip of the Day**, and Concourse program information. You can also access the **Licenses** dialog box from this menu to add additional licenses.

Concourse Toolbar



This toolbar consists of eight buttons that allow you to perform activities related to cataloging, patrons, circulation, lookup, reports, and administration.

By default, the toolbar does not display. However, you can display the toolbar by clicking **Window | Toolbar** from Concourse's menu bar. Repeat this command to hide the toolbar.

By default, the toolbar displays on the right side, but you can move it by clicking its border and dragging it to a new location. If you drop the toolbar near the top, bottom, right, or left side of the Concourse window, it attaches (or docks) to the border of the window. If you drop the toolbar in the middle of the interface, it becomes a toolbox with a title bar.

Chapter 2: Setting Up

Item Classes

In Concourse, **Item Classes** are organized by type into 6 categories. You can create and store up to 64 different item classes within each category, and you can associate up to 6 different item classes (one from each group) with a bibliographic record. Item classes are grouped in the following categories:

- **Age Groups** identify a target audience (e.g., Children, Adults, K-3, Grades 9-12).
- **Locations** identify a physical location in the library (e.g., Teacher Resource Center, Reference, Audio/Video Room, Music Section). Location also refers to separate branches if applicable.
- **Material Types** identify the medium (e.g., Book, eBook, CD, DVD).
- **Circulation Types** define the circulation rules (e.g., Equipment Circ, Reference-No Circ, Overnight).
- **Report Classes** group items for report generation (e.g., Vertical File, Furnishings, Computer Software, DVDs); defaults are based on the main Dewey classes.
- **Study Programs** identify items associated with point-based reading programs (e.g., **Accelerated Reader**, **That's a Fact Jack**, **Electronic Bookshelf**).

All of these categories are required elements of a bibliographic record (except **Study Programs**); defaults can be set for the required categories. Configuration procedures for all item classes are identical because all **Add/Edit Item Class** dialog boxes are based on the same template.

Warning! You can modify an item class, but you cannot remove one. Carefully consider which types of item classes you need and modify existing defaults before creating new ones. Modifying an existing item class affects all records in your database associated with that class.

Configuring Item Classes

Before adding items to your library database, configure the item classes you use in your catalog.

Note: Configure the item classes necessary for current items in your library. You can add new classes when needed.

1. Click the **ADMIN** button on the **Navigator Toolbar**.
2. Click the **Add/Modify Item Classes** button on the flow chart to open a shortcut menu.
3. Click an item class category to open the appropriate **Add/Edit** dialog box.
4. If you need to edit an existing item class, click the **New Name** and **Description** fields, delete or highlight the existing text, and then enter your new name and description.

5. If you need to add an additional class, click **Add New Entry**. The **New Name** field of a new row is highlighted, and the words **<Enter New Name>** and **<Enter New Description>** display in the corresponding columns. Enter the name of your item class. Then press **Tab** to move to the next field, and enter a description of this class.
6. Repeat steps 4 and 5 to modify or add any item classes you need.
7. To change the default item class, click the **Default** drop-down button at the top of the dialog box, and click again to make a selection.

   Note: This default displays in the appropriate drop-down list when you open the **Add/Modify Items** dialog box. No default setting is available for **Study Programs**.

8. When you are finished, click **Save Changes**.
9. A dialog box displays, asking you to confirm that you want to save changes.
10. Click **Yes** to save your item class changes; otherwise, click **No**.

    Note: If you need more information about setting up item classes, press **F1** from the **Add/Edit** dialog box.

Patron Classes

Patron classes allow you to sort patron records into groups with uniform restrictions and privileges (you can specify exceptions). This simplifies daily activities by setting basic parameters for each patron. Patron classes cross-reference the *circulation type* item class, so you can assign appropriate loan periods for cataloged items.

Warning! You can modify a patron class, but you cannot remove one. Carefully consider which types of patron classes you want to use and modify existing defaults before creating new ones. Modifying an existing patron class affects all records in your database associated with that class.

Configuring Patron Classes

Before adding patron records to your database, configure the patron classes you use in your library.

Note: Configure all patron classes needed for your current patrons. You can add new classes as needed.

1. Click the **ADMIN** button on the **Navigator Toolbar**.
2. Click the **Add/Modify Patron Classes** button on the flow chart to open the **Edit Patron Class** dialog box.
3. To edit an existing class, do the following:
   - Click the **Old Patron Class name:** drop-down button, and click again to select the one you need to modify. The **New Patron Class name:** and **Description:** fields are populated.
   - Change the name and description as needed.
   - Modify the class privileges using the descriptions in step 5.

4. To add an additional class, do the following:

   - Click the **Create New...** button to open the **New Patron Class** dialog box.
   - Enter the name of your new class in the **Patron Class Name:** field.
   - Enter a description in the **Patron Class Description:** field.
   - If this class is similar to an existing class, click the **Copy Initial Settings from:** drop-down button, and click again to select the class. Otherwise, skip to step 5 for information on configuring settings.
   - Click **Create** to save your new class. Now you can modify this class just like other existing classes.

5. You have up to three options in the **Disallow Circ privileges:** section to specify when circulation privileges will be restricted for patrons in this class:

   - **when patron has more than {amount} in fines** – Specify the dollar amount of fines.
   - **or has {quantity} overdues** – Specify the maximum number of overdue items.
   - **Or patron has {quantity} items checked out** – Specify an item check out limit.
   - The grid at the bottom of the dialog box lists existing circulation types for the patron class. For each circulation type, you can configure up to seven limits.

     - **Limit** – Specify the maximum number of items per type a patron can check out.
     - **Loan Period** – Specify the number of days a patron can keep item types without renewing.
     - **Grace Period** – Specify the number of days to wait beyond the **Loan Period** before assessing fines. Items returned after the grace period will accrue fines on these days.
     - **Fine Amount** – Specify the dollar amount to be assessed with each fine accrual period.
     - **Fine Every** (fine accrual period) – Specify how many days the **Fine Amount** accrues (1 = every day, 7 = weekly, etc.).
     - **Max Fine** (dollar amount) – Specify the maximum fine for each item of a particular type.
     - **Renew Limit** – Specify the number of times a patron is allowed to renew items of this type.

   Note: If you need additional information about setting up patron classes, press **F1** from the **Edit Patron Class** dialog box.

6. Click **OK** to save changes to the patron class and close the **Edit Patron Class** dialog box.

Setting a Default Patron Class

If you are adding patron records for a large group of patrons in the same class, preset the patron class to save time. This might happen in a high school library each year as the new freshman class is added to the database.

Tip! To further expedite the patron entry process, you can purchase a **P-Link** license for Concourse. This would enable you to import patron records from another application or a text file. Contact your Book Systems Account Manager for more information about **P-Link**.

1. Click the **ADMIN** button on the **Navigator Toolbar**.
2. Click the **Add/Modify Patron Classes** button on the flow chart to open the **Edit Patron Class** dialog box.
3. Click the **Default Patron Class** drop-down button to open a list, and click again to select a different patron class.
4. Click **OK** to save your new default.

   Note: When adding patron records on the **Add/Modify Patrons** dialog box, your default displays in the **Patron Class** drop-down list on the **Demographics** tab. You can change the class, but the default returns as soon as you save the current patron record.

Worker Records

You need to set up a log in name, a password, and a set of system privileges for each worker in your library. Individual worker records allow you to control worker access to your database. For example, workers can be limited to check in and check out privileges only or given access to more functions. Administrative privileges, such as overriding check out limits, configuring worker records, etc., can be reserved for the head librarian and a supervisor.

Important! For security purposes, we recommend that you configure at least one full permissions worker record and then disable the system default worker record.

1. Click the **ADMIN** button on the **Navigator Toolbar**.
2. Click the **Worker Records** button to open the **Edit Worker Records** dialog box.
3. Enter the name you want to add or modify in the **Login Name** field and move to the next field.
   - If you are modifying an existing worker, the record loads with the current permissions, and the appropriate number of asterisks display in the password field.
   - If you are adding a new record, all permissions except **Concourse Commuter** and **Requires PIN Login** are selected by default. Enter the new password in both the **Password** and **Confirm Password** fields and then enter the worker initials in the corresponding field.

4. Click to select permissions you want to enable, or click to *de*select permissions you want to disable. See a summary of privileges in the “Worker Permissions” section below.

   Note: To temporarily disable a worker record without changing the defined privileges, click the **Disable Login** check box in the bottom left corner of the dialog box. When you are ready to reactivate the record, return here, specify the **Login Name**, click to deselect the check box, and save the record.

5. When you are finished, click **Save**.
6. A message dialog box opens, asking you to confirm that you want to save the worker record.
7. Click **Yes** to keep your changes; otherwise, click **No**.

Worker Permissions

The permission check boxes available on the **Edit Worker Records** dialog box are listed and defined below.

Supervisor Permissions

- **DoubleCheck** – Allows workers to verify patron and item records.
- **Checkout Overrides** – Allows workers to override warnings when patrons are checking out materials.
- **File Maintenance** – Allows workers to perform maintenance functions, such as backup/restore, rebuild indexes and files, obfuscate history, verify, and configuration setup.
- **Renew Overrides** – Allows workers to override warnings when patrons are renewing materials.
- **Reserve Overrides** – Allows workers to override warnings when patrons are reserving materials.
- **Waive Fines** – Allows workers to waive fines.
- **Review History** – Allows workers to view item, patron, and worker history.
- **View Reports** – Allows workers to view and generate reports.

Administrator Permissions

- **Setup Program** – Enables the following worker permissions: modify patron/item classes, edit worker records, set up/customize report columns, import from Bookmobile, load Bookmobile, configure Concourse OPAC, generate form letters, update Concourse, and obfuscate history.
- **Bulk Operations** – Enables the following worker permissions: delete patrons, delete items, and edit Call Number prefixes.
- **Override Authority** – Enables workers to enter a record in a manner that deviates from the normal authority settings.
- **Set Configuration** – Enables workers to use the configuration setup features.

Material Related Permissions

- **Add Items** – Lets workers add item records to the database.
- **Modify Items** – Lets workers modify item records in the database.
- **Delete Items** – Lets workers delete item records from the database.
- **Perform Inventory** – Lets workers perform inventory functions.
- **Export MARC 21** – Lets workers export MARC records to a file.
- **Print Supporting Materials** – Lets workers print barcodes and other labels.

Patron Related Permissions

- **Add Patrons** – Permits workers to add patron records to the database.
- **Modify Patrons** – Permits workers to modify patron records in the database.
- **Delete Patrons** – Permits workers to delete patron records from the database.

Circulation Related Permissions

- **Checkin Items** – Authorizes workers to check items back into the database.
- **Checkout Items** – Authorizes workers to check items out to patrons.
- **Renew Items** – Authorizes workers to renew items for patrons.
- **Reserve Items** – Authorizes workers to place items on reserve.
- **Enable Special Due Dates** – Authorizes workers to assign special due dates.
- **Review Patron Circulation Info** – Authorizes workers to generate the **List of Patrons** and **List of Patrons with Items** reports and review patron demographic and circulation information on the **Circulation Desk** (check out) dialog box.
- **Assess Fine/Accept Payment** – Authorizes workers to assess overdue fines and process payments.
- **Modify Patron/Material Messages** – Authorizes workers to modify or delete information on the **Messages** dialog box for patrons or items. ***Workers can still *add* messages even if this option is disabled.
- **Concourse Commuter** – Authorizes workers to perform remote circulation functions and inventory with Concourse Commuter.
- **Print Due Date Slips** – Authorizes workers to print due date slips for patrons during the check out process.
- **Add Messages** – Authorizes workers to add messages to patron and item records.
- **Requires PIN Login** – Realigns the worker's **Circulation Desk** permissions in order to create a self check out station for your library.

Setting Up the Due Date Calendar

You can configure the **Due Date Calendar** so that due dates do not fall on days when the library is closed. In addition, you can designate closings caused by inclement weather as no-fine dates.

You can open the **Concourse Due Date Calendar** dialog box by clicking the **CIRCULATION** button on the **Navigator Toolbar** and then clicking the **Due Date Calendar** button on the flow chart.

When you first install Concourse, your **Due Date Calendar** is configured so that every day is a valid due date; there are no preconfigured holidays. You must edit the calendar before performing check outs to ensure the due dates do not fall on a holiday or regularly scheduled closing.

Finding a Date on the Calendar

At the top of the calendar, to the right and left of the current month and year, there are four buttons displaying the following symbols: **<<**, **<**, **>**, **>>**. Use these buttons to locate a date by scrolling backwards and forwards by year (**<< / >>**) and month (**< / >**).

Configuring Holidays and Regular Closings

1. Find the date on the calendar that you need to set as a regular closing or holiday by scrolling to the correct month and year.
2. For each calendar day, the **Calendar Due Date** (the true date) is in the upper, right-hand corner of the box, and the **Alternate Due Date** is across the bottom of the box. By default, these dates match.
3. Click the **Alternate Due Date**, and either enter or select an alternate due date. You can use the scroll buttons or the drop-down calendar to select the date.

   Note: Press **F1** to access the Help files if you need information about how to select dates.

4. When you finish making changes, click **Save** to keep your work and close the calendar.

Configuring Ranges of Dates

Concourse also allows you to configure a range of dates or specific days of the week that your library is closed. For example, your library might be closed on Sundays.

1. On the **Concourse Due Date Calendar** dialog box, click the **Configure…** button in the lower, right-hand corner to open the **Calendar Configuration** dialog box.
2. There are three options for you to use in configuring your calendar:

   - **Configure range of dates** – Click this check box if your library will be open or closed on a specific range of dates for any reason, such as for inventory or a long holiday weekend. Click the correct radio button, and then specify the range of dates affected.
   - **Configure day** – Click this check box if you want to specify a particular day of the week your library is open or closed; this applies to the active year. Click the correct radio button, and then click to select the correct day from the drop-down list.
   - **Charge fines on affected dates** – If you want to charge fines on the dates you have specified above, click the check box. Concourse will assess fines as normal on those dates.

3. When you are finished, click the **Commit Changes** button to add these settings to your due date calendar.

Configuring No-Fine Days

Follow the steps below to set up a no-fine date on the **Concourse Due Date Calendar** dialog box.

- Find the date that you want to set as a no-fine day by scrolling to the correct month.
- Click the green dollar sign corresponding to the date you want to set as a no-fine date. A red null sign covers the dollar sign for that date to show that it is a no-fine date.

- If you need to undo this action, click the dollar sign again to remove the null sign and allow fines for that day.
- When you are finished, click **Save** to keep your changes and close the calendar.

Chapter 3: Cataloging

After configuring item classes, you are ready to add items to your catalog. Open the **Add/Modify Items** dialog box by clicking the **CATALOG** button on the **Navigator Toolbar** and then clicking the **Add/Modify Items** button on the flow chart.

Notice that when you open this dialog box, the name displayed in the title bar is **Creating New Item *ItemID***. When you use this dialog box to review or modify an item, its title changes to **Editing Item *Title***. For clarity, this document refers to both versions of the dialog box as the **Add/Modify Items** dialog box.

The setup of this dialog box depends on whether you are using Concourse or Concourse Pro. In Concourse the dialog box includes **Title** and **ItemID** fields along with many other fields separated into tabs. In Concourse Pro, the dialog box contains a form for entering MARC tags. This guide discusses how to catalog in Concourse; for more information about cataloging with Concourse Pro, see the Help files.

An optional **Authority** license is available, which enables authority control in Concourse. For more information about related features, refer to **Chapter 17** in the Concourse User's Guide or see the **Authority** book in the Help files. If you are interested in obtaining an **Authority** license, please contact your Book Systems Account Manager.

Using the Cataloging Functions

A toolbar displays across the top of the **Add/Modify Items** dialog box, which helps you quickly perform cataloging functions.

Table 1: Cataloging Toolbar

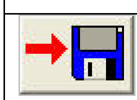
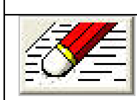
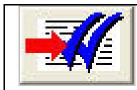
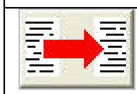
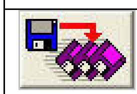
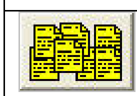
	**Lookup** allows you to open the **Catalog Lookup** dialog box to find and review an item record.
	**Save Changes** stores the current item record.
	**Clear Fields** clears all the fields of the **Add/Modify Items** dialog box.
	**Delete** removes the item record from your database. **Warning!** Once a record is deleted, its ID number can never be used again. **Note:** You can bulk delete item records; see the "Bulk Deleting Items" section in **Chapter 8** for more information.

Table 1: Cataloging Toolbar

	**DoubleCheck On/Off** enables the **DoubleCheck** feature, allowing you to verify that item records in your database are correct. To disable **DoubleCheck**, click this button again.
	**DoubleCheck Record** marks the current item record as successfully double-checked after you have verified that it meets library standards. See the “DoubleCheck Feature” section in **Chapter 8** for more information.
	**Skip Next Record** skips the next record in the **DoubleCheck** queue without double-checking it.
	**Import MARC Records On/Off** enables the importing of MARC records one at a time. Click this button again to disable importing at any time during the procedure. Concourse marks your place in the import file so you can resume the same import later. (This button is only active with a Level 4 Concourse license.)
	**Messages** opens a dialog box that allows you to read and write messages associated with the item record. For more information, please refer to the “Messages” section in **Chapter 8**.

Add/Modify Items

This dialog box consists of seven tabs, which are summarized in the following list:

- **Core** – This tab is where you enter the most common information in the bibliographic record, such as author, Call Number, and publication information.
- **Analytics** – This tab is where you enter title, subject, and author analytics, as well as subject headings, summaries, etc.
- **Other** – This tab contains additional information such as dedications, comments, physical descriptions, and parallel and uniform titles.
- **Media** – This tab allows for the attachment of related electronic images, documents, sound files, movie files, etc.
- **Programs** – This tab is reserved for Study Program information if the item is part of a point-based reading program like **Accelerated Reader**.
- **MARC** – This tab allows you to review a record in MARC format.
- **Card** – This tab allows you to review a record in card catalog format.

Building an Item Record

Now that you are familiar with the cataloging toolbar and tabs, you are ready to create your own item record. When you first open the dialog box, it is blank except for the item class drop-down lists, which contain your defaults, and the **Item-ID** field, which contains the next available number in your database. This will be the item ID of your new record.

1. In the **Add/Modify Items** dialog box, enter the title of the item you are adding to your catalog in the **Title** field and press **Tab**. Notice that the **Save Changes** button in the toolbar is now active. The ID and title are the only required data for the item record; enter information in the remaining fields as needed.

   Note: You do not need to do anything with the **Copyof** field and **Add copy** buttons to initially add items; making *copies* of items is discussed later.

2. Notice that the first four drop-down lists on the **Core** tab are item classes, which display the defaults that you specified earlier (see the "Item Classes" section in **Chapter 2**). Change the item classes as needed by clicking the appropriate drop-down button and then clicking again to make a selection.
3. Complete the other fields on the **Core** tab as needed.

   Note: To find more details about each of the fields on these tabs, press **F1** to open the related Concourse Help topic.

4. Click the **Analytics** tab, and complete the fields:
   - Enter related subjects in the **Subject Headings** field; enter a backslash (****) between separate subjects as needed.
   - If the item is part of a series, enter the name in the **Series Title** field.
   - Enter any comments about the item in the **Note** field.
   - Enter a synopsis of the item in the **Summary** field.
   - Enter information about anyone listed on the title page besides the author, such as an illustrator, in the **Stmt of Resp** field.
   - If applicable, enter references to works within a work in the **T. Analytics** field.
   - Enter co-authors, editors' names, etc. in the **A. Analytics** field.
   - Enter references to different subjects within the work in the **S. Analytics** field.
   - Enter the name of the illustrator(s), musician(s), and/or performer(s) of the work in the **Artist** field.

5. Click to select the **Other** tab, and add any relevant information in the following fields:
   - Enter donor information in the **Donor**, **In Memory of**, and **In Honor of** fields.
   - Enter any notes that may be useful to library workers in the **Comment** field.
   - Enter any technical or physical attributes, such as length, and the dimensions of the item in the **Tech. Desc.** and **Dimen.** fields.
   - Enter a translation of the title in the **Parallel Title** field.
   - Enter the title by which the item is commonly known in the **Uniform Title** field.
   - The initials of the worker who most recently changed the item record and the date and time of the last edit displays by default in the **Last Update By** fields after the record is saved.
   - Click the **Cards**, **Labels**, and/or **Barcode** check boxes in the **Needs to be printed** section if any of those have not been printed yet.

6. If you have a media item to attach, complete the **Media** tab as well. For each field where you need to upload a file (**Movies**, **Images**, **Sounds**, etc.), do the following:
   - Either enter the file location in the field or click the **Browse…** button to access the **Open** dialog box.
   - Find your media file, and then click **Open** to insert it into the appropriate field.
7. If the item is part of a point-based reading program, click the **Programs** tab and complete the fields as follows:
   - Under **Add\Edit Study Programs**, click the **Program Name:** drop-down button, and click again to select a Study Program.
   - Enter the appropriate values assigned to the item in the **Reading Level:**, **Interest Level:**, and **Point Value:** fields.
   - Add any additional comments about the item in the **Note:** field. This can be reading program or library-specific information.
   - Click the **Add** button.
   - The program information you specified is added to the grid.
   - If this item is a part of more than one reading program, repeat this process to add the additional program(s).

   Note: Refer to the Concourse Help files for more information about adding or modifying the Study Programs.
8. You can click the **MARC** or **Card** tabs to view the record in MARC format or card catalog format, but you cannot modify these tabs.
9. Click the **Save Changes** button to keep your work.

Adding Copies of Item Records

If you have multiple copies of an item, you can save time by entering it once and then making copies of this master record in one of the following ways:

- With a blank **Add/Modify Items** dialog box, enter the item ID or barcode of the master record in the **Copyof** field and press **Tab**. The data from the master record is copied to this one using the next available item ID. Make any necessary changes and save the record.

  Note: When the information from the master record populates the dialog box, a **Master** button displays next to the **Copyof** field. Click this button to access the original record from which your copy is being made at any time.
- View the master record in the **Add/Modify Items** dialog box by specifying the item ID or barcode number or by clicking **Catalog Lookup** to find the record. Click the **One** button next to **Add copy**. The data in the master record is copied using the next available item ID. Make any necessary changes and save the record.

  Note: You can also add multiple copies using the **Many** button. See the **Adding Copies** Help topic for details.

Importing MARC Records

There are two popular ways of importing MARC records into Concourse:

- Vendor disks
- Other libraries on the Internet (eZcat/eZcat Pro)

If you purchase books from a vendor that supplies the MARC records on disk, you can import directly from that disk using **Batch Import**. To perform a batch import, click the **CATALOG** button on the **Navigator Toolbar**, click the **MARC Records** button on the flow chart, and then click **Batch Import MARC Records…** from the shortcut menu. Press **F1** to learn more about the **Import MARC 21 Records** dialog box.

Concourse has two add-on modules – eZcat and eZcat Pro – that allow you to connect to other library servers and retrieve MARC records from those libraries. With either of these products, you can simply click the **CATALOG** button on the **Navigator Toolbar** and then the **eZcat** button on the flow chart to open the product. You can retrieve complete, up-to-date MARC records quickly and easily. You can also clean or modify these records before transferring them directly to your Concourse database.

Contact your Book Systems Account Manager for more information about the eZcat products.

Printing Item Labels

Concourse offers several printing options which allow you to print spine and pocket labels, barcodes (if applicable), and catalog cards.

Note: You can press **F1** from any of the dialog boxes referenced below to open the Concourse Help files for more information.

- **Spine and Pocket Labels** – Click the **CATALOG** button on the **Navigator Toolbar**, and then click **Print Labels** on the flow chart.
- **Barcodes** – Contact your Book Systems Account Manager to purchase this additional feature. When you have the license, click the **CATALOG** button on the **Navigator Toolbar**, and then click **Print Barcodes** on the flow chart.
- **Catalog Cards** – Click the **CATALOG** button on the **Navigator Toolbar**, and then click **Print Catalog Cards** on the flow chart.

Chapter 4: Patrons

After you have configured your patron classes, you are ready to enter patron records into your database. Concourse provides the **Add/Modify Patrons** dialog box to add patron records manually (requires Level 3 Concourse license or higher); you can also use the **P-Link** option to import patron records automatically (requires P-Link license with any level of Concourse).

Open the **Add/Modify Patrons** dialog box by clicking the **PATRON** button on the **Navigator Toolbar** and then clicking the **Add/Modify Patrons** button on the flow chart.

Notice that when you open this dialog box, the name displayed in the title bar is **Creating New Patron *PatronID***. When you use this dialog box to review or modify a patron record, its title changes to **Editing Patron *Name***. For clarity, this document refers to both versions of this dialog box as the **Add/Modify Patrons** dialog box.

There are many similarities between the **Add/Modify Items** dialog box and the **Add/Modify Patrons** dialog box, so this chapter covers the similar features only briefly and spends more time on features you have not seen before.

Patron Toolbar

The buttons on the patron toolbar are also on the cataloging toolbar. The available buttons, from left to right, are as follows:

- **Lookup** – Click to open the **Patron Lookup** dialog box so that you can find and review a patron record.
- **Save Changes** – Click to save the record.
- **Clear Fields** – Click to clear all fields on the dialog box.
- **Delete** – Click to remove the currently displayed patron record from the database.

  Note: Once deleted, you cannot reuse the patron ID. You can bulk delete patron records if needed; see the “Bulk Deleting Patrons” section in **Chapter 8** for more information.

- **DoubleCheck on/off**, **DoubleCheck this record**, **Skip to next record** – Click these buttons as needed to enable and use the **DoubleCheck** feature (see the related section of this guide for more information about double-checking records).
- **Messages** – Click to open the **Messages** dialog box for the patron. You can make any notes as needed concerning each patron. You can also open the patron **Messages** dialog box by clicking the **Msgs...** button on the **Circulation Desk** (check out) dialog box.

  Note: For more information about these options, see the Concourse Help files or review the “Using the Catalog Functions” section in **Chapter 3**.

Adding Patron Records

To add patron records to your catalog, open the **Add/Modify Patrons** dialog box and complete the information on the three tabs, as required by your library standards. We have summarized some key points of this dialog box below; refer to the Concourse Help files if you need more details.

Patron Name

You must enter the patron name in the following format: **LastName, FirstName**. If you do not enter the names in this consistent format, you will have trouble searching for patron records and generating useful patron reports.

Multiple Family Members

The **Family of** feature is available for adding patrons in the same family. This saves time because you are not required to enter common information more than once. This feature works just like the **Copyof** feature in cataloging.

1. If you are adding a patron who already has a family member in your database, enter the patron ID of the family member (the master record) in the **Family of** field.
2. Press **Tab**. The address, city, state, zip code, and home phone number on both the **Demographics** and **Alt Demographics** tabs are copied from the master record. The valid dates on the **Alt Demographics** tab are also copied.
3. Enter the patron name for the new record in the **Name** field.
4. Make any necessary changes to the record.
5. Click the **Save Changes** button to keep your work.

Patron Class

The **Patron Class** drop-down button displays at the top of the **Demographics** tab. Notice that it displays the default patron class that you selected earlier (see the “Setting a Default Patron Class“ section in **Chapter 2**). If needed, click the drop-down button, and click again to select another class.

Patron Pictures

You can add a photo to the patron record in one of the following ways:

- Attach from a disk – Click the **Browse...** button to access the **Open** dialog box and select the drive, path, and file name. Then click the **Open** button.
- Take a picture – If you have a digital camera attached to your computer, click the **Photo...** button, and then take the picture. Press **F1** from the **QuickCam** dialog box for more information.

  Note: A dialog box opens, displaying a message if the camera is not attached correctly to your machine or is not turned on.

User Defined Fields

The **Other Info** tab includes three user-defined fields as well as fields for various information, such as comments, alerts, notes, birth date, card expiration date, and more. Enter data in the user-defined fields if you need to record information that is not covered in a pre-defined field. If you want to generate reports based on this information, you must be consistent about the type of data you place in the fields. For instance, you might choose to reserve the **User Defined #1** field for each patron's driver's license number.

Plink

The **Plink** is the number Concourse uses to match records when you import/update records from a file with the **Patron Link (P-Link)** feature; this feature requires the purchase of an additional license. Contact your Book Systems Account Manager for more information on this feature or to purchase a license.

Alt Demographics

This tab, which is almost identical to the **Demographics** tab, can be useful for any patron who has a temporary address. For instance, if a college student does not live at home, you can enter a parent's address or another address where you can reach him/her during breaks between semesters and weekends.

Patron Form Letters

Concourse allows you to generate a variety of form letters, such as overdue notices, fine notices, and announcements. The **Form Letter Print Wizard** feature allows you to group your form letters by criteria such as patron class or overdue status. You can then print them or e-mail them to your patrons.

Using Form Letters

To use form letters, click the **PATRON** button on the **Navigator Toolbar**, and then click the **Form Letters** button on the flow chart. A shortcut menu opens, where you can click one of the following options:

- **New…** – Click to open a blank **Form Letter** edit window to create a new letter.
- **Edit…** – Click to access the **Open** dialog box. Click to select a saved letter to open and modify. Concourse supplies five pre-configured letters:
    - **EveryItemE.rtf** – This letter lists the items that the patron currently has checked out.
    - **OverdueNoticeE.rtf** – This letter lists all items the patron has that are currently overdue.
    - **OverdueNoticeWithCostsE.rtf** – This letter lists all items the patron has that are currently overdue plus the cost of each overdue item.
    - **PickupAvailableE.rtf** – This letter notifies the patron that the item(s) they have on reserve are now available for check out.

    - **UnpaidFinesE.rtf** – This letter notifies the patron of all outstanding fines, along with information about each associated item.
- **Print…** – Click to access the **Open** dialog box. Click to select a saved letter to open and print. The letter opens, and the **Form Letter Print Wizard: Select Patrons** dialog box displays so you can specify which patrons should receive the letter before printing.
- **Most recently used file list (1-4)** – Click one of the letters listed to quickly open one of the last four form letters accessed.

The Form Letter Editor

When you create or modify a form letter, the **Form Letter** window opens; this window is similar to a word processor but is tailored to functions needed to generate form letters.

The following Windows-standard edit functions are available when you are working with form letters. You can access them through the **Edit** menu on Concourse's menu bar or by using the key sequences specified:

- **Cut** (**Ctrl + X**) – Remove the selected text and place a copy on your system clipboard so that you can paste it to another location.
- **Copy** (**Ctrl + C**) – Copy the selected text to your system clipboard so that you can paste it to another location.
- **Paste** (**Ctrl + V**) – Paste the most recently cut or copied text where you insert your cursor.
- **Undo** (**Ctrl + Z**) – Undo the last change.
- **Select All** (**Ctrl + A**) – Select all of the text in the form letter.

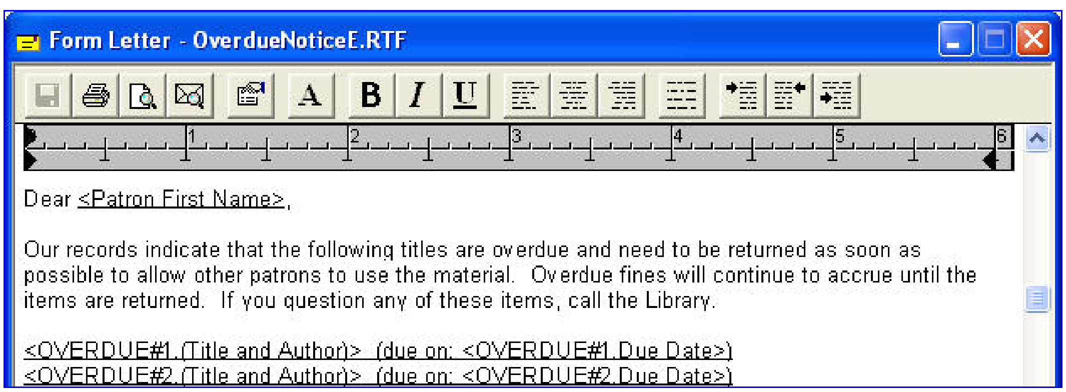
The following Windows-standard file functions are available through the **File** menu on Concourse's menu bar:

- **New** – Click to open a blank **Form Letter** window and create a new form letter.
- **Open…** – Click to access the **Open** dialog box where you can find the file you need to modify.
- **Close** – Click to close the file you are editing without saving. If you have made changes, a confirmation dialog box displays asking if you want to close without saving.
- **Save** (**Ctrl + S**) – Click to save your changes. If you are saving an existing letter, this action saves the file under the *current* file name. If you are saving a new letter, the **Save As** dialog box opens so you can name the letter.
- **Save As...** – Click to open the **Save As** dialog box to save the file under a new file name.

Use the following buttons on the **Form Letter** window toolbar to build and modify your form letters:

- Click **Save** to keep changes that you have made to the currently displayed form letter.
- Click **Print** to open the **Form Letter Print Wizard**, which allows you to specify the group of patrons receiving the letters and the method of distribution.

- Click **Preview** to view the letter in the print preview window. You can zoom in or out on the letter in this mode. Click the **Edit** button to return to edit mode.
- Click **Letter/E-mail status** to open the **Review History** dialog box, listing any send actions performed on the current date. You can change the date range or other filter options as needed.
- Click **Insert Field** to insert merge fields in the letter, such as patron name, address, overdue items, etc.
- Click **Fonts** to choose the font style and size that you want to use in the letter.
- Click **Bold**, **Italics**, or **Underline** to add these format features to the selected text. These buttons look recessed when the associated format is applied to the selected text. Highlight the text you need to format before selecting one of these options. To remove formatting, select the text again and then click the appropriate button again.
- Click **Left justify**, **Center justify**, or **Right justify** to align the paragraph text to the left-hand margin, center, or right-hand margin. In a new form letter, everything is aligned to the left-hand margin by default.
- Click **Double space** to skip every other line within the selected paragraphs. Click this option again to return the selected paragraphs to single-spacing.
- Click **Left Indent**, **Right indent**, or **Hanging indent** to move the corresponding margins by a half inch. You must select the paragraphs for which you are modifying margins. If you need to move the margins back to the original position or set them on smaller intervals, click and drag the margin arrows in the ruler bar beneath the **Form Letter** toolbar.



Merge Fields

Merge fields are the key to form letters, allowing you to create a generic letter but fill in patron-specific information from the database. For instance, if you add the **Patron Name** and **Address** merge fields, that information is automatically pulled from the Concourse database and displayed in the merged letter(s). When you send form letters, one letter is generated for each patron.

When added, the merge fields display in the form letter editor in the following format:

<MergeFieldName>

When you click the **Insert Field** button, you can choose from an extensive list of merge fields. The merge field names correspond to the field names in the **Add/Modify Patrons** dialog box. (Item Merge Fields, which are denoted with a # sign, are discussed in the next section.)

Add a merge field to your form letter by doing the following:

1. Click to place your cursor where you want the information to display in the letter.
2. Click the **Insert Field** button . The **Select Field to Insert** dialog box opens.
3. From the list, click to select the *patron* merge field that you need to add.
4. Click **OK**.
5. If you clicked the **Current Date:** field, the **Select Date Format** dialog box opens. Choose a date format option and then click **OK**.
6. The merge field is added to the form letter.

Item Merge Fields

Item merge fields are used to include items in specific circulation states, such as out, overdue, reserved, and so forth; these are designated with the **#** sign in the **Select Field to Insert** dialog box. Each item merge field requires a subfield referencing pertinent information from the item record, such as title, author, due date, ItemID, and more.

An item merge field only draws a *single* record, so make sure that you have included enough of them in your form letter. For instance, if you are sending a form letter to patrons with multiple overdue items, you should add a merge field for each one. To do this, click the merge field in the **Select Field to Insert** dialog box, then click a subfield when prompted, specify a record number in the **Record** field so that you can capture every overdue item a patron has, and click **OK**. Repeat the steps for each overdue item. The fields display in the form letter as follows:

<OVERDUE#1.Title>
<OVERDUE#2.Title>
<OVERDUE#3.Title>
<OVERDUE#4.Title>
<OVERDUE#5.Title>

Note: If it is possible for a patron to have up to 10 overdue items, you should include 10 merge fields.

The following item merge fields are listed:

- **AVAILABLE#** – items the patron had on reserve that are now available
- **FINE#** – items for which the patron owes fines
- **ITEM#** – items checked out to the patron
- **OVERDUE#** – items the patron has not returned by the due date
- **RESERVE#** – items the patron has on reserve, regardless of availability

Form Letter Print Wizard

1. After you have generated your form letter and are ready to print, do one of the following to open the **Form Letter Print Wizard: Select Patrons** dialog box:
    - Click the **PATRON** button on the **Navigator Toolbar**; then click the **Form Letters** button to open a shortcut menu and click **Print…**. Select the file from the **Open** dialog box, and then click **Open**.
    - With the file open in the **Form Letter** window, click the **Print** button on the toolbar.
2. In the first dialog box of the print wizard, choose one of the following options at the top:
    - **All patrons** – Choose this option to generate a letter for all patrons in your Concourse database. If you select this option, the remainder of the dialog box is disabled because no further filter criteria are required.
    - **Select patrons manually** – Selecting this option allows you to manually choose the patrons for whom you are generating a form letter. If you select this option, the remainder of the dialog box is disabled because no further filter criteria are required.
    - **Select any patron that matches one or more of the checked criteria below** – This option allows you to filter for a specific group of patrons using the options in the bottom section of the dialog box. All criteria is joined with the Boolean operator **OR**, meaning that only *one* of the selected filter criterion needs to match in order to include a patron record in the form letter merge.
    - **Select only those patrons matching ALL of the checked criteria below** – This option allows you to filter for a specific group of patrons using the options in the bottom section of the dialog box. All criteria is joined with the Boolean operator **AND**, meaning that *all* selected filter criteria needs to match in order to include a patron record in the form letter merge.
3. If you selected either of the last two options in step 2, the bottom section of the dialog box is enabled; select the search criteria options you need to apply in the merge:
    - **Patrons that have items Checked Out** – Click this check box to look for patrons who currently have items checked out, regardless of whether those items are checked out in good standing or are overdue.
    - **Patrons that have Items on Reserve** – Click this check box to look for patrons who have placed items on reserve.
    - **Patrons that owe {quantity} or more** – Click this check box and then specify a dollar amount in the field to look for patrons who owe over the specified amount in fines.
    - **Patrons that are {quantity} to {quantity} days overdue** – Click this check box and then specify a range of days to look for patrons who have overdue items that fall in this range.
    - **Patrons in Class:** – Click this check box and then select a patron class from the drop-down list to look for patrons that fall within the specified patron class.

- **Filter more:** – Click this check box to open the standard **Build Filter** dialog box where you can specify filter criteria; this is the same dialog box used for filtering reports (see the “Building a Filter” section in **Chapter 7** for more information).

4. Once you have selected the options on the first dialog box, click **Next>** to proceed to the **Form Letter Print Wizard: Edit Patron List** dialog box.
5. All patrons that match the criteria specified in the previous dialog box are listed. If you would like to add or remove a patron from the list, perform the following steps:

    - To add a patron, click the **Add Patron…** button to open the **Patron Lookup** dialog box. Specify your search criteria and click **Lookup**.

      Note: Press **F1** from the dialog box for more information.

    - To remove a patron, click to highlight the patron in the list and then click the **Remove Patron** button.

6. If needed, click to select a different sort option in the **Order by:** section and then click **Apply Sort**. The list is reordered accordingly.
7. Click **Next >** to proceed.
8. In the **Form Letter Print Wizard: Output** dialog box, select the method by which you want to distribute your form letters. You may choose both the e-mail and the printing options, or you can choose just one.

   E-mail Settings:

    - If you do not need to send e-mail notifications, click to deselect the **E-mail to Patron** check box. If you are sending e-mails, leave the check box selected and proceed.
    - Specify a topic in the **E-mail Subject:** field, such as **Reserves Available**.
    - Click the **E-mail Settings** button, and complete all of the fields in the **E-mail Settings** dialog box.
        - **SMTP server:** – Enter the library’s e-mail server address, such as **mail.server.com**.
        - **Sender E-mail Address** – Enter the library’s e-mail address.
        - **Sender User Name** – Enter your name or the library’s name.
        - **Reply to E-mail Address** – Enter the address to which patrons can send replies, such as **patronservices@library.com**.
        - **Reply To Name** – Enter the name associated with the reply e-mail address.
        - **Use Authentication** – To establish a secure connection, click this check box and then complete the fields beneath it.
        - **UserID** – Enter your user identification.
        - **Password** – Enter the password associated with your account.
        - Click **OK** to save changes and close the **E-mail Settings** dialog box.

Note: Once you configure the **E-mail Settings**, the information is retained. You will not need to enter this information again when you e-mail form letters in the future.

Send to Printer:

- If you only want to print letters that cannot be sent via e-mail (i.e., there is no e-mail address in the patron record), click to select the **Only print if no e-mail address for patron** check box.
- If you are printing multiple letters, you can click the **Collate for cutting** check box to sort the letters so they can be separated.
- If you selected the **Collate for cutting** check box, specify the number of letters to print per page in the **Number per page** field. Either enter the number manually, or use the arrows located on the right to scroll to the number.
- Click the **Log in History** check box if you need to record the send form letters action in your history.

9. Click **Finish** to print and/or e-mail your form letters.

Printing Patron Labels

Concourse offers several printing options which allow you to print spine and pocket labels, barcodes (if applicable), and catalog cards.

Note: You can press **F1** from any of the dialog boxes referenced below to open the Concourse Help files for more information.

- **Address Labels** – Click the *text* on the **PATRON** button on the **Navigator Toolbar** to open a shortcut menu, click **Print**, and then click **Address Labels**.
- **Barcodes** – Contact your Book Systems Account Manager to purchase this additional feature. When you have the license, click the **CATALOG** button on the **Navigator Toolbar**, and then click **Print Barcodes** on the flow chart. Be sure to click the **Patron** radio button in the upper, left-hand corner to print barcodes for patrons

Chapter 5: Circulation

Once you have configured your patron and item classes, added the items to your catalog database, and added patron records to your library, you are ready to begin circulating materials. This includes checking items in/out and assessing/processing fines.

Note: Circulation features require a Level 3 Concourse license or higher.

Check Out an Item to a Patron

Use the following steps to process check out transactions for your patrons:

1. Click the **CHECKOUT** button on the **Navigator Toolbar** to open the **Circulation Desk** dialog box.

   Note: If applicable, you may see a **Receipt Printer Setup** dialog box before the check out dialog opens. You can configure printer settings and click **OK** or click **Cancel** to skip this step.

2. Load a patron record in one of the following ways:

   - Enter the patron ID/barcode in the **Patron** field and press **Enter**.
   - Enter the patron's name in the **Patron Name** field and press **Enter**.
   - Click the **Lookup Patron…** button to find the patron record.

3. Once you have loaded the patron record, a dialog box notifies you of any alert messages or any items the patron has reserved that are now available. Each reminder displays in its own dialog box. Click **OK** to dismiss each one.
4. If you need to specify a special due date for this patron, click to select the **Special Due Date** check box before entering item information. If you do not need to specify a special due date, you are ready to check the item out.
5. Scan or enter the item ID or barcode in the **Item** field.

   - If you selected the **Special Due Date** check box, specify a due date in the **Select a Date** dialog box, and then click **OK** to add the item to the patron's check out list.
   - If the patron has exceeded any fine, overdue, or circulation limits, the appropriate warning messages display. If you have the correct worker permissions enabled, you can click **Yes** to override the error and add the item to the check out list; otherwise, click **No**.
   - If there is no warning or special due date, the item is added to the patron check out list.

6. To clear the patron record, press the **Esc** key once, or click the **Next Patron ESC** button. To close the dialog box, press **Esc** a second time, click the **Close ESC** button, or click the close button in the title bar.

Check In an Item

Use the following steps to process check in transactions when items are returned:

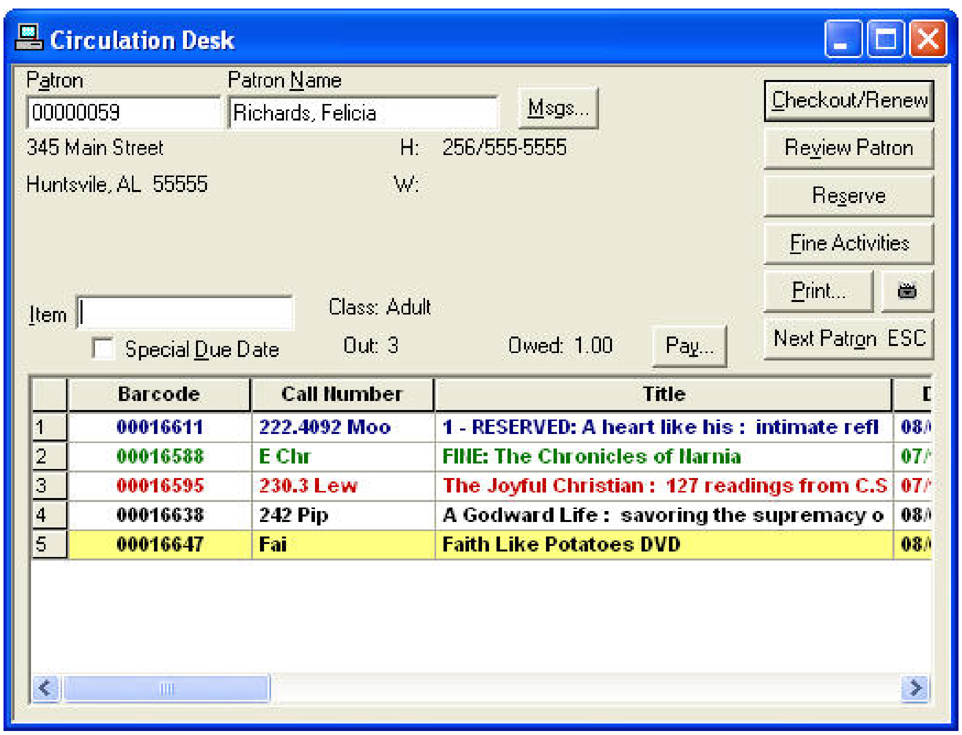
1. Click **CHECKIN** on the **Navigator Toolbar** to open the **Circulation -- Checkin** dialog box.

   Note: If applicable, you may see a **Receipt Printer Setup** dialog box before the check in dialog opens. You can configure printer settings and click **OK** or click **Cancel** to skip this step.

2. If you are specifying a special check in date for an item, click to select the **Use Special Checkin Date** check box. For example, you can use this for items left in a book drop on the previous day.
3. Scan or enter the item ID or barcode in the **Item:** field.
4. If you selected the **Use Special Checkin Date** check box, specify the date in the **Select a Date** dialog box, and then click **OK** to add the item to the check in list.
5. If the item you are checking in is on reserve for another patron, a message dialog box displays to remind you. Click **OK** to dismiss the message and add the item to the check in list.
6. To close the check in dialog box, click the **Done** button or press the **Esc** key.

Color Coding

After checking an item in or out of your Concourse database, the item displays in a list at the bottom of the appropriate dialog box.



The item records listed in these dialog boxes are color-coded to help you identify overdue items, fines, and reserved items, as follows:

- Items that are reserved display in **blue**.
- Items that have attached fines display in **green**.
- Items that are overdue with no accrued fines display in **red**.
- Items that are checked out but have no accrued fines, are not overdue, and are not on reserve display in **black**.
- Items with attached messages display on a **yellow** background. Right-click the item, and then click **Item Messages** from the shortcut menu to open the **Messages for Item *ItemID*** dialog box.

Fine Activities

The **Fine Activities** menu allows you to manually assess fines, record fine payment, waive fines, or estimate what a fine will be on a specified date. You can open the menu by clicking the **Fine Activities** button on either the check in or the check out dialog boxes.

There are three functions available on the **Fine Activities** menu: **Assess Fine...**, **Pay Fines...**, and **Estimate Fines....** Each one is discussed below.

Note: To find more information about fines, press **F1** from any of the dialog boxes or consult your Concourse User's Guide.

Assess Fine

You can manually assess fines for damaged items or make corrections to a patron account erroneously credited with a payment or a waived fine.

1. Open the **Circulation Desk** or the **Circulation -- Checkin** dialog box. Load a patron record or check in an item to enable the fine options.
2. Click the **Fine Activities** button to open a shortcut menu.
3. Click **Assess Fine…** to open the **Assess Fine** dialog box.
4. Enter a dollar amount in the **Amount to Assess:** field, including the decimal. If you are not certain of the exact amount you need to assess, click **Start | Programs** (or **All Programs**) **| Accessories | Calculator** to open the Windows standard calculator.
    - Use either the mouse or the keyboard to calculate the appropriate dollar amount.
    - Enter the calculated fine amount in the **Amount to Assess:** field.
5. Verify that the amount you entered is correct.

    Note: You can change the item number associated with the fine, but you cannot change the patron. If you need to assess fines for a different patron, you should review that patron's history in the check out dialog box and open the **Assess Fine** dialog box again.

6. Depending on how many items were in the check in/out list when you opened the **Assess Fine** dialog box, the item ID may or may not be listed for you. If needed, you can specify the item or change the item by entering a number or clicking **Lookup** to search for the item.
7. If you are assessing a fine to pay for an item that the patron has lost, click the **Mark Lost** check box. When you select this check box, Concourse pulls the item cost from the database and displays the amount in the **Amount to Assess:** field.

   Note: The **Mark Lost** check box is not available if you are assessing a fine from the check in dialog box because you should have the physical item.

8. Verify that you have the correct fine amount and item and patron numbers, and then click the **Assess** button.

   - If the specified item is not currently checked out to this patron, a warning message displays. If you want to assess the fine anyway, click **Yes**; otherwise, click **No** to return to the **Assess Fines** dialog box.
   - If you selected the **Mark Lost** check box, a confirmation dialog box displays asking you to verify that you want to mark the item lost; click **Yes** to do so or **No** to return to the **Assess Fines** dialog box to make changes.
   - If the item is not checked out to the patron and you are trying to mark it lost, a message opens stating that the item cannot be marked lost through the circulation desk because it was not checked out to the patron. Click **OK** to dismiss the message and return to the **Assess Fines** dialog box.
   - If the item is checked out to the patron or if you confirmed that you want to assess the fine, the **Assess Fines** dialog box closes and the fine is added to the patron record.

Pay Fines

Items that display in **green** in the list on the check in/out dialog boxes have attached fines. When a patron needs to pay one of these fines, open the **Pay Fine** dialog box in one of the following ways:

- From either the check in or check out dialog boxes, click the **Fine Activities** button, and then click **Pay Fines…** from the shortcut menu.
- If you are on the check out dialog, you can click the **Pay...** button.
- Right-click the **item** in the **Circulation Desk** list to open the shortcut menu and then click **Pay Fine**.

  Note: Using the right-click menu allows you to process fines for only one item, even if the patron has fines on multiple items.

The **Pay Fine** dialog box opens, displaying one or more items for which this patron owes fines. From this dialog box, you may choose to collect or waive the patron's total fine or a portion of the fine.

1. In the **Pay Fine** dialog box, enter the amount the patron is paying or the amount you are waiving (including the decimal) in the **Amount to Pay or Waive:** field.
2. Verify that the amount displaying in the field is correct.

3. Click the appropriate command button:
    - Click the **Pay** button if the amount that you entered is to be applied as a payment received.
    - Click the **Waive** button if the amount that you enter is to be waived.
4. The amount field is cleared and the appropriate adjustment is made to the balance in the **Amount Owed** field. You can now enter another amount to pay or waive for this patron, if needed.
5. When you are finished with this dialog box, click **Close**.

Estimate Fines

If needed, you can estimate the fines that will accrue on an item as of a certain date. For instance, if a patron calls in to tell you that he or she will be unable to return an item on time, but the item is not available for renewal, you can estimate the overdue fines for the patron as follows:

1. From the check in or the check out dialog box, click **Fine Activities**, and then click **Estimate Fines…** from the shortcut menu to open the **Estimate Fine** dialog box.
2. If needed, enter the patron and item barcodes into the corresponding fields, or click the **Lookup…** buttons to find the record.
3. If you are estimating fines for all items a patron has out, leave the **Item Barcode** field blank, and click to select the **All Items Out** check box.
4. If you want to see the current fines for this patron and item, click the **Current** button to view the updated amount in the **Current Fine** field.
5. To estimate fines for a future date, click the **Estimate...** button. The **Select a Date** dialog box opens.
6. Specify the date through which you want to estimate fines.
7. Click **OK** and then note the updated amount in the **Estimated Fine** field.
8. Click **Done** to close the dialog box.

Chapter 6: Searching

Concourse offers four different types of search tools: **Easy Word**, **Expert**, **Barcode**, and **Study Programs**.

Click the **LOOKUP** button on the **Navigator Toolbar** to view the flow chart with all search options.

Easy Word Search

Open this dialog box by clicking **Easy Word Search** on the **LOOKUP** flow chart. Use this search to find items by terms/keywords in the records.

1. In the **Easy Word Search** dialog box, all of the information types available to search are selected by default. Click to deselect the check boxes associated with any information that you do not need to search.

   Note: If needed, you can select the check boxes again by clicking the **Search All** button.

   - **Author** – Searches the **Author** and **A. Analytics** fields.
   - **Title** – Searches the **Title**, **Series Title**, **T. Analytics**, **Parallel Title**, and **Uniform Title** fields.
   - **Subject** – Searches the **Subject Headings** field.
   - **Keyword** – Searches the **Subject Headings**, **Summary**, **T. Analytics**, **S. Analytics**, **Artist**, **Parallel Title**, and **Uniform Title** fields.
   - **Donor** – Searches the **Donor**, **In Memory of**, and **In Honor of** fields.

2. Enter your search criteria in the **Enter Any Significant Word(s)** field in one of the following ways:

   - Enter the word(s) in the field, separated with spaces.
   - Click the drop-down button, and click again to select criteria saved from previous searches.

     Note: Search words must match exactly; for example, **foot** will not find **feet**; **wood** will not find **wooded**, **trees**, **woods**, **lumber**, etc.

3. Click **Search** to run the query. Your search results are listed in the **Search Results** dialog box (discussed in detail later).

Expert Search

Open this dialog box by clicking **Expert Search** on the **LOOKUP** flow chart. This search combines the following specialized features:

- You can select the type of information for which you want to search (**an author's name**, **a title**, etc.).
- You can specify a qualifier, which indicates whether the data **begins with**, **contains word(s)**, **ends with**, or **equals** the specified search criteria.

- You can specify the search term or word; this must be an exact quote from the information type field. It can be partial information, but a phrase must be entered in the correct order. For example, you can specify **a title contains word(s)** ***my utmost*** to find *My Utmost for His Highest*, but the words ***highest utmost*** will not find it.
- You can combine up to three different search criteria with the Boolean operators **And**, **But Not**, or **Or**.

When you have specified your search criteria, click **Search** to run the query. See the “Search Results” section later in this chapter for details about your results.

Boolean Operators Defined

- **And** – Items must match *all* of the criteria, before and after the **And** operator.
- **But Not** – Items must match all the criteria preceding the **But Not** operator, but must *not* match the criteria after the operator.
- **Or** – Items may match any one of the criteria, before or after the **Or** operator.

Note: If you need more specific information about conducting an **Expert Search** or if you would like to learn about Boolean operators, press **F1** from the **Expert Search** dialog box to open a related topic in the Concourse Help files.

Barcode Search

Open the **Search By Barcode** dialog box by clicking **Barcode Search** on the **LOOKUP** flow chart. This search simply looks for a match to a specified barcode number.

1. Enter the barcode number for the item that you want to locate in the **Barcode:** field. You can omit leading zeros.
2. Click **Search** to proceed. If a match is found, the **Search Results** dialog box opens, displaying the record in **Full Info (Card Image)** format; otherwise, a dialog box alerts you that no match is found.

Study Programs Search

Open the **Find Item for Study Program** dialog box by clicking **Study Programs Search** on the **LOOKUP** flow chart.

This search dialog box lets you specify one or two search criteria related to the item’s general data; if applicable, results must match both criteria (combined with the **And** operator).

In addition, you can search the specific information entered on the **Programs** tab of the **Add/Modify Items** dialog box for any or all of the following criteria:

- You can find only those items associated with a specific reading program.
- You can find items with a specific value or range in the **Reading Level:** field.
- You can find items with a specific value or range in the **Interest Level:** field.
- You can find items with a specific value or range in the **Point Value:** field.

- You can find items with a specific word or phrase contained in the **Note:** field on the **Programs** tab.

Note: You are not required to complete any of the fields in this dialog box. Selecting **Search** while all the fields are blank will compile a list of all items in your database associated with a Study Program.

Specify your search criteria and then click **Search** to run the query. See the "Search Results" section below for information about your results.

Note: If you need more specific information about conducting a **Study Program** search, press **F1** from the **Find Item for Study Program** dialog box to open a related topic in the Concourse Help files.

Search Results

When conducting a search using any one of the four search tools, you see one of the following results.

- If only one result is found, the **Search Results** dialog box opens, displaying the record in **Full Info (Card Image)** format.
- If more than one result is found, the **Search Results** dialog box opens, displaying the records in **Summary** format.
- If no matches are found, a dialog box opens either letting you know that there were no matches or asking if you want to see near matches if applicable; see the following section for more information.

Near Matches

When performing an **Easy Word Search** or **Expert Search** that yields no results, Concourse asks if you want to view a list of near matches. Click **Yes** to open the **Near matches for '*Search Term*'** dialog box.

This dialog box displays a portion of the index, which may contain a form of the search word you entered. If you do not see an appropriate search term, you can use the **Expand Search** arrow buttons to scroll through the entire index of words.

Note: If you are conducting an **Expert Search** and choose only **keyword** and/or **anything** under **Search for items that match:**, the **Near matches** dialog box is not available.

Using the Search Results Dialog Box

The search results dialog box has two display modes: **Summary** and **Full Info**.

- **Summary** – This displays one or more records in a list. You can customize the list to contain the information fields you need to view, and you can resize the column widths.

- **Full Info** – This displays the selected item record in the traditional card catalog format.

There is a button at the bottom of the dialog box with a magnifying glass. It reads **Summary** when you are in **Full Info** mode and reads **Full Info** when you are in **Summary** mode.

- Click the **Summary** button to review all of your search results in **Summary** mode.
- Click to select an item row in the **Summary** view list, and then click the **Full Info** button to review the item record in **Card Image** format.

Features on the Search Results Dialog Box

Note: If you need additional information about any of the features discussed below, press **F1** from the appropriate dialog box to open the associated topic in the Concourse Help files.

- Click to select an item in your list. If any one of the four buttons at the top becomes active, there is a media file attached to the item record. Click any active button to open the media (play a sound file, open a document, etc.).
- Click and drag the column dividers in the column headings to resize the column widths.
- Click and drag the row dividers in the numbered row headers to resize the row heights.
- In **Summary** view, right-click the column headings to open the **Choose fields for display** dialog box, from which you can add or remove columns from the **Summary** display.
- Click the **Limit** button at the bottom left to open the **Limit Search Results** dialog box, where you can specify a particular Age Group or Material Type. You can also click the **Use Advanced Filter** check box to open the **Build Filter** dialog box where you can set more criteria.
- Click the **Mediagraphy** button to build an item report from your search results. Once you have created this report, you can print or review it by clicking the **Mediagraphy** button again and clicking **Print** or **Review** from the menu.
- Click the **Sort…** button to open the **Sort Search Results** dialog box, where you can select the sort order (ascending vs. descending) and how the list is arranged (copyright, author's first or last name, title, or Call Number).
- Click the **Help F1** button to open a related Help topic.
- Click the **Print** button to open the **Print** dialog box, where you can specify settings and print your search results list.
- Click the **New Search** button to close the **Search Results** dialog box and return to your previous search dialog box.
- Use the **up** and **down arrow** buttons at the bottom right to scroll through the search results list, one item record at a time.

Chapter 7: Reports

You can generate reports quickly and easily in Concourse by selecting the type of report that you need from the **REPORTS** flow chart.

Generating a Report

To generate most reports, choose the name of the report you want to create and define a filter.

1. Click the **REPORTS** button on the **Navigator Toolbar**.
2. Click the **Reports** button on the flow chart to open a shortcut menu with all reports, or click the button for the type of report you need to generate.
3. Click the report name.
4. A message dialog box displays asking if you would like to specify a filter. If you need to build a filter, click **Yes**; if you need to run a standard report with *all* applicable results, click **No**. Otherwise, click **Cancel**.
5. If you click **No**, your report is generated and displayed. If you click **Yes**, proceed to the “Building a Filter” section below.

   Note: Patron reports (**List of Patrons** and **List of Patrons with Items**) are unique and use different types of filters. Steps for customizing both of these reports are covered later in this chapter.

Building a Filter

The standard **Build Filter** dialog box allows you to combine up to ten filter criteria with the Boolean operators **And** or **Or**. Specify your filter criteria as follows:

1. Click the first drop-down button, and click again to select a data type from the list. For example, if you need to find all items by a certain author, you can select **Author’s Last Name**.
2. Click the next drop-down button, and click again to select a qualifier; these terms tell Concourse how to join the data type and search term(s). For example, select **begins with** to find an author’s name that begins with certain letters.
3. In the corresponding field at the right, specify your search term(s). For example, if you want to locate all novels by Michael Crichton, but you are unsure of the spelling, you can enter **CRI** as the search term.
4. To add more filters, click the **More Criteria** button. A second set of filter criteria fields display in the dialog box.
5. Repeat steps 1-3 to create your filter.
6. Click the **And** or **Or** radio button to select which Boolean operator you need to join your multiple filters:

   - **And** – Select this operator if you want to find records that match *both* filters. This narrows your search results.
   - **Or** – Select this operator if you want to find records that match at least one specified filter criteria. This broadens your search results.

7. A **Please Wait … Processing** dialog box displays while your search results are being generated.
8. When you are finished, click **OK** to generate your report.

Note: If you need more information, press **F1** from the **Build Filter** dialog box to open the related topic in the Concourse Help files.

Report Toolbar Options

Report toolbar buttons are pictured below along with option descriptions.

Table 2: Report Toolbar

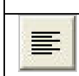
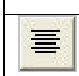
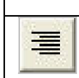
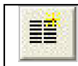
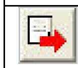
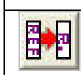
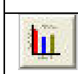
	Click the **Save Current Filter** button to save the criteria you used to generate the report you are viewing, so you can quickly regenerate a report at any time using the same filter.
	Click the **Print** button to open your **Print** dialog box, where you can print a hard copy of the current report.
	Click the **Preview** button to open a preview of the hard copy report in your Concourse window. Click the **Close** button above the preview to return to the normal report view.
	Click the **Zoom In** button to make the words display larger on the screen.
	Click the **Zoom Out** button to make the words display smaller on the screen.
	Click the **UnZoom** button to return to the default magnification setting.
	Click the **Change Color** button to change the color of the alternating fields in your report.
	Click a column heading and then click the **Align Left** button to left justify the text in that column.
	Click a column heading and then click the **Center** button to center the text in that column.
	Click a column heading and then click the **Align Right** button to right justify the text in that column.
	Click the **Configure Appearance** button to open the **Format Display** dialog box (options described following the table).

Table 2: Report Toolbar

	Click the **Add Column** button to open the **Add Field to Report** dialog box, which allows you to select a data field to add to your report. You can specify the width of your column and the justification of your text.
	Click the **Export To Text** button (only available in item reports) to export your report to a text file that you can open in programs such as Microsoft Word, Excel, etc.
	Click the **Export Patron Data** button (only available in patron reports) to open the **Export Patrons** dialog box. This option allows you to export data to a text file.
	Click the **Export to XML** button to export data from your patron or item report to an XML file. The **Save As** dialog box opens; click the directory and specify the file name, and then click **Save** to generate the XML export file.
 (items)  (patrons)	Click the **Bulk Delete** button (appearance of button will change, depending on your report) to delete a group of items or patrons at one time.
	Click the **Bulk Edit Call Number Prefixes** button to edit specified Call Number prefixes.
 (items)  (patrons)	Click the **Edit Mode** button (appearance of button will change, depending on your report) to edit eligible fields in your reports.
	Click the **Graph Columns** button to graph and compare data easily for the **Holdings Summary**, **Collection Age**, and **Statistics** reports.

The **Format Display** dialog box allows you to customize the following elements of your generated reports.

- **Font** – Change the font type, size, style (italic, bold), effects (strikeout, underline), and color in the selected column(s) or row(s).
- **Color** – Change the background and/or foreground color of the selected column(s) or row(s).
- **Align** – change the horizontal and vertical text alignment within the cells of the selected row(s) or column(s).

- **Wrap Text** – Enable or disable text wrapping. This allows text to break across multiple lines.
- **Auto Size** – Enable or disable auto-sizing. This automatically adjusts row height to accommodate multiple lines of text or to eliminate white space.
- **Allow Enter** – Enable or disable allow enter. This lets you insert a new line (carriage return) in a cell/field by pressing **Enter** when you are in **Edit Mode**; otherwise, pressing **Enter** would move your cursor to the next cell/field.

  Note: This option only applies to reports that offer the **Edit Mode**, such as **Accession List**, **List of Patrons**, and more.

- **Based On** – Choose the preset format you want to apply to the selected text. Format settings on other tabs are applied in addition to the format selected on this tab. There are three preset formats available:
  - **Standard** – Use the default formatting for report cells.
  - **Column Header** – Use the formatting from the row displaying the column headings.
  - **Row Header** – Use the formatting from the column displaying the row numbers.

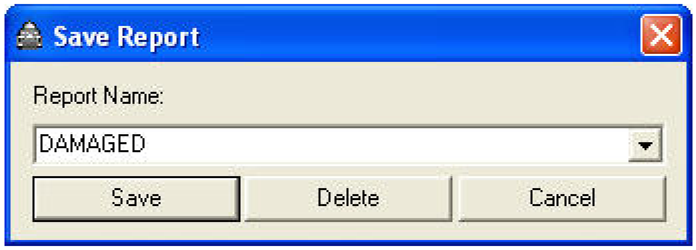
Message Reports

The **List of Messages** report allows you to generate a list of all messages in the database with the related item and/or patron barcodes. If you generate a message report with filters that you use often, you can save it to quickly regenerate it as needed.

- To save your report, click the **Save Current Filter** button on the report toolbar to open the **Save Report** dialog box.
- Enter a name in the **Report Name:** field.
- Click **Save**.
- You can regenerate this report later by clicking the **Message Reports** button from the **REPORTS** flow chart and then clicking **Saved Message Reports**.

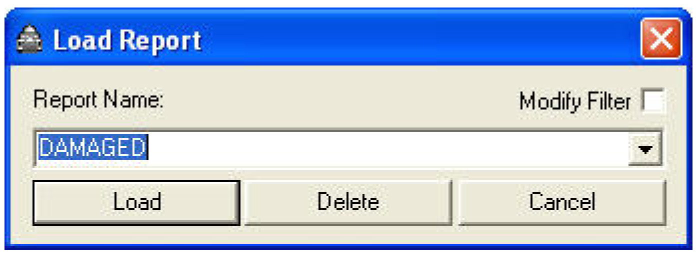
For example, you can specify a filter as follows:

- This filter generates a report of all patrons and items with the word “damaged” in the message text, including items that you noted as being damaged and patrons who damaged an item in their possession.
- After generating this report, click the **Save Current Filter** button on the toolbar.
- Enter the report name **DAMAGED** and click **Save**.



Later, you can query the database again with the same filter to generate a report with current results:

- Click **Saved Message Reports** from the **Message Reports** shortcut menu. The **Load Report** dialog box opens.
- Notice that this dialog box has a **Modify Filter** check box. Click this check box if you want to modify the existing filter criteria for the saved report.
- The **Report Name:** drop-down list displays the most recently saved report by default. If needed, click the drop-down button, and click again to select a different report name.



- Click **Load** to generate a report.

  Note: If needed, you can click **Delete** to remove the saved filter from your database or **Cancel** to dismiss the dialog box without running a new report.

Patron Reports

Patron reports provide other options (along with the standard **Build Filter** dialog box) to easily set up common filters related to circulation status and more. Both of the patron reports are generated in different ways, so we cover both procedures here.

The patron reports are available from both the **PATRON** and **REPORTS** flow charts, but steps in this section focus on the **PATRON** flow chart.

Note: Patron reports require a Level 3 Concourse license or higher.

List of Patrons

Click the **PATRON** button on the **Navigator Toolbar**, and then click the **List of Patrons** button on the flow chart. A dialog box opens, asking if you need to create a filter. If you click **Yes**, the **Select Patrons** dialog box opens.

1. Click one of the following options at the top of the dialog box.
    - **All patrons** – Includes all patron records from your Concourse database in the report. The bottom section of the dialog box is disabled when you select this option because no further filter criteria are required.
    - **Select any patron that matches one or more of the checked criteria below** – This option allows you to filter for a specific group of patrons using the options in the bottom section of the dialog box. All criteria is joined with the Boolean operator **OR**, meaning that only *one* of the selected filter criterion needs to match in order to include a patron record in the report.
    - **Select only those patrons matching ALL of the checked criteria below** – This option allows you to filter for a specific group of patrons using the options in the bottom section of the dialog box. All criteria is joined with the Boolean operator **AND**, meaning that all of the criteria need to match in order to include a patron record in the report.
2. If you select either of the last two options above, the search criteria at the bottom of the dialog box is enabled; select the criteria you need to apply:
    - **Patrons that have items Checked Out** – Click this check box to look for patrons that currently have items checked out, regardless of whether those items are checked out in good standing or overdue.
    - **Patrons that have Items on Reserve** – Click this check box to look for patrons that have placed items on reserve.
    - **Patrons that owe {amount} or more** – Click this check box and then specify a dollar amount in the field to look for patrons that owe over the specified amount in fines.
    - **Patrons that are {quantity} to {quantity} days overdue** – Click this check box and then specify a range of days to look for patrons that have items that are overdue by the specified number of days.
    - **Patrons in Class:** – Click this check box and then select a patron class from the drop-down list to look for patrons that fall within the specified patron class.
    - **Filter more:** – Click this check box to open the standard **Build Filter** dialog box to apply the same type of filter that you would apply to other reports. Press **F1** from the **Build Filter** dialog box for details.
3. After selecting your criteria, click the **OK** button to generate your report.
4. Click the **Save Current Filter** button from the report toolbar to open the **Save Report** dialog box.
5. Enter a name in the **Report Name:** field.

6. Click **Save** to keep your report filter.

   Note: Reload a saved **List of Patrons** report filter by clicking the **Patron Reports** button on the flow chart, clicking **Saved Patron Reports** from the shortcut menu, specifying the **Report Name**, and then clicking **Load**.

List of Patrons with Items

Click the **PATRON** button from the **Navigator Toolbar**, and then click the **Patron Reports** button on the flow chart to open a shortcut menu. Click **List of Patrons with Items** to open the patron report wizard that will help you build the report.

You can also save and regenerate your stored **List of Patrons with Items** reports directly from the report wizard; see the steps below for details.

1. On the first dialog box of the report wizard, **Select source of report**, click one of the following options:
   - **New Report** – Create a new report with a new filter.
   - **Existing Report** – When you select this option, a list of saved reports displays in the field below the radio buttons.
     - Click to highlight an existing report from the list.
     - To modify the filters for the report, click to select the **Modify the existing report** check box.
2. Once you select the options on the first dialog box, click **Next >** or **Finish** to proceed.
   - If you selected the **New Report** radio button or **Modify the existing report** check box, proceed to the next dialog box in the wizard.
   - If you selected the **Existing Report** radio button without clicking the **Modify the existing report** check box and clicked **Finish**, skip the rest of the wizard. The report is generated with the saved settings.
3. The next dialog box in the report wizard is the same **Select Patrons** dialog box you used to filter the **List of Patrons** report. Please review the “List of Patrons” section earlier to complete this dialog box.
4. After selecting the filter settings, click **Next >** to proceed.
5. In the **Select Fields in the Report** dialog box, you can select the fields you want to include in the report.
   - Click **Add Field** to open the **Add Field to Report** dialog box, click to highlight the field(s) you want to add, and then click the **Add Field(s)** button.
   - Click to highlight any field you want to remove and then click **Delete Field**.
   - Click the appropriate check boxes on the right:
     - **Reserved items** – Click this check box if you want to include any items that a patron has on reserve.
     - **Checked out items** – This check box and the subordinate **Only include Overdues** check box are selected by default. If you do not want to include any items that are currently checked out to a patron, click to deselect this check box.

- **Only include Overdues** – If you left the **Checked Out Items** check box selected, you can leave this selected as well, or you can click to deselect the check box if you want to find patrons with any items checked out, regardless of whether they are overdue or in good standing.
- **Fines** – Click this check box to include items for which a patron has unpaid fines.

6. After completing the **Select Fields in the Report** dialog box, click **Next >** to proceed.
7. On the **Advanced Patron Report Sort** dialog box, you can use the drop-down lists to specify the primary, secondary, and tertiary sorts for the report as needed. You can also specify sorting in ascending (0-9 and A-Z) or descending (Z-A and 9-0) order.
8. After specifying sort preferences, click **Next >** to proceed.
9. On the **Save Report** dialog box, enter a name in the **Filename** field if you need to save this report for regeneration later.
10. Click **Finish** to generate your report. The report lists matching records with multiple rows for *each* patron included:
    - The first row displays the patron's name, patron ID number, and patron class.
    - The second row shows the number of items checked out to the patron.
    - The subsequent rows list the item records that match your filter criteria. Notice that the column headings correspond to the item rows.

Catalog Reports

Catalog reports are generated with the standard **Build Filter** dialog box. Click the **REPORTS** button on the **Navigator Toolbar**, and then click the **Reports** button on the flow chart to open a shortcut menu. Click a report name, and then click **Yes** when a dialog box asks if you want to specify a filter.

The following catalog reports are available:

- **Accession List** – List of items sorted by barcode numbers
- **List of Titles** – List of items sorted by title
- **Titles Sorted by Author** – List of items sorted primarily by author and then by title
- **Shelf List** – List of items, sorted by Call Number (i.e., location on your shelves)
- **Study Programs Report** – List of items associated with a study program
- **List of Overdue Items** – List of items that are overdue
- **List of Reserved Items** – List of items on reserve

If you generate a report with a specific filter you plan to use frequently, you can save the filter criteria for regeneration in the future using the same steps discussed earlier in this chapter.

Administrative Reports

Administrative reports are generated automatically. You do not have the option to specify or save a filter. These reports are available when you click the *text* on the **REPORTS** button on the **Navigator Toolbar**; most of these are also available from the **REPORTS** and **ADMIN** flow charts.

The following administrative reports are available:

- **Holdings Summary** – Summary and details of library holdings by item class
- **Collection Age Report** – Summary and details of library holdings by copyright year
- **Statistics** – This option opens a submenu of statistical reports. All of these reports allow you to specify a date range
    - **Circulation by Item Report Class** – List of all report classes, including circulation statistics
    - **Circulation by Patron Class** – List of all patron classes, including circulation statistics
    - **Ca$h Drawer** – List of all report classes, including received and waived fine statistics
    - **Items Added/Deleted** – List of all report classes, including database statistics of item records added or deleted
    - **Patrons Added/Deleted** – List of all patron classes, including database statistics of patron records added or deleted
    - **Item Usage Report** – List of items circulated for a specified period of time
    - **In House Usage** – List of all report classes and the number of items in each used in your library during a specific period of time

Authority Reports

You must have an **Authority** license to use authority control features in Concourse. Authority reports can be limited by the beginning letter(s) of the name/subject in your records. These reports are available when you click the **Administrative Reports** or **Item Reports** buttons on the **REPORTS** flow chart.

Note: The Authority module is not available in Concourse Pro.

- **Name Authority** – List of author names. Authors in **blue** are in authority. Authors in **black** are not in authority.
- **Subject Authority** – List of subject headings. Headings in **blue** are in authority. Headings in **black** are not in authority.

Chapter 8: Additional Features

Concourse offers you several additional features with which to streamline your library's automation process. Some of these features are listed in this chapter. These features are explained in greater detail in the Concourse User's Guide and the Help files. Additional licenses are not required for any feature listed in this section.

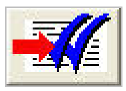
DoubleCheck Feature

This feature is used to verify the accuracy of records entered in the database and is available for both patron and item records.

Concourse automatically places any added or modified records in the DoubleCheck queue. Items remain in this queue until an authorized worker marks them checked.

An item's DoubleCheck status does not affect its accessibility; you retain full access to an item regardless of its place in the queue. Using this feature is optional.

1. Open either the **Add/Modify Items** dialog box (from the **CATALOG** flow chart) or the **Add/Modify Patrons** dialog box (from the **PATRON** flow chart).
2. Click the **DoubleCheck** button.



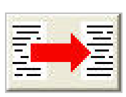
3. A message dialog box opens asking if you would like to specify a filter. Click **Yes** to specify the filter, or click **No** to include all records in your DoubleCheck queue. Either the first record in the database or the first record in your filter results displays in the dialog box. Notice that the **DoubleCheck this record** and the **Skip to next record** buttons are now enabled on the toolbar.

   Note: For more information about building filters, see the "Building a Filter" section of this guide or press **F1** from the **Build Filter** dialog box to open the Concourse Help files.

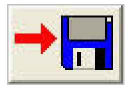
4. Review the displayed record for any errors and make any necessary changes.
   - If you are satisfied with the record, click the **DoubleCheck this record** button which marks the record checked and removes it from the queue. The next record in the queue displays in the dialog box.

   - You can choose not to check the current record by clicking the **Skip this record** button. The record remains in the DoubleCheck queue to be checked at a later date. The next record in the queue displays in the dialog box.

- If you made changes to a record, you can save it and move it to the end of the queue by clicking the **Save Changes** button.



5. Continue checking until all records have been processed. A message dialog box opens when you have finished, stating that all records have been double-checked. Click **OK** to dismiss the message.

   Note: If you need to stop before all the records in the queue are processed, click the **DoubleCheck** button again to quit.

Concourse will remember the last record checked. The next time you use DoubleCheck, Concourse returns you to the next record in the queue.

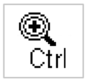
Messages

Concourse allows you to add relevant messages to both patron and item records. You can add messages to a patron record, such as **Always returns materials late!** or **Item has sustained water damage.**

1. Open the **Messages** dialog box for a patron or item in one of the following ways:
   - Load a patron record in the **Circulation Desk** dialog box, and then click the **Msgs...** button.
   - From the **Add/Modify Patrons** dialog box, load a patron record, and then click the **Messages** button.
   - From the **Add/Modify Items** dialog box, load an item record, and then click the **Messages** button.
   - After you check in an item on the **Circulation -- Checkin** dialog box, right-click the item in the list and then click the **Item Message** option.
2. Now, you can add a message, edit an existing message, or delete a message (if you have the correct worker permissions enabled).
   - To add a new message, click the **Add New** button. A new line displays in the **Message** dialog box; begin typing to overwrite the default text **Enter your Message here**.

     Note: The following fields are automatically completed by Concourse: **Patron Barcode** (if applicable), **Last Updated By** (worker), and **Message Date**.
   - To edit an existing message, highlight the existing **Message Text** and enter a new message.
   - To remove a message, click to select a field within the message, click the **Delete** button, and then confirm by clicking **Yes**.
3. Click **Save** to keep your changes and close the dialog box, or click **Cancel** to exit the dialog box without saving.

   Note: Concourse allows you to turn the message option off. See the **Configuration Settings** Help topic for more information.

Ctrl + Click 

This feature is available throughout Concourse in places such as reports and the circulation dialog boxes. When you move your cursor over any applicable grid, the mouse pointer (white arrow) becomes the **Ctrl + Click** icon. If you press and hold the **Ctrl** key and click an item or patron record, you can open the **Add/Modify** dialog box for that item or patron.

Note: The **Ctrl + Click** function is a convenient way to review and modify records while in summary mode.

Configure Timeouts

For patron security, you can configure Concourse to clear the check out dialog box after a certain number of seconds.

1. Click the *text* on the **ADMIN** button on the **Navigator Toolbar**, and then click **Configure Timeouts…** to open the **Configure Timeouts** dialog box.
2. Click the **Use Timeout** check box to enable the timeout feature.
3. In the **Timeout Duration (in seconds)** field, specify the length of time before the **Circulation Desk** dialog box resets (e.g., enter 120 to timeout after two minutes).
4. Click **OK**. The timeout feature will remain enabled until you clear the **Use Timeout** option on the **Configure Timeouts** dialog box.

Review History

This feature allows you to review your database history and filter by date, action, worker, patron, or item. To open the **Review History** dialog box, click the **ADMIN** button on the **Navigator Toolbar**, and then click the **Review History** button on the flow chart.

The history displayed by default is limited to the current date. If you want to include the patron name (if applicable) and item title when you print the item/patron history, click the **Print Details** check box; otherwise, leave it disabled.

To change the history limits, you have the following options:

- Change the date or range of dates:
  - To change the date or date range of the results, enter a different date in the **From** and**/**or **To** fields. You can also use the scroll arrows to the right to scroll to the correct date or use the drop-down arrow to select the date from a calendar.
  - To remove the date filter and view database history since it was originally implemented, click to disable the **Restrict to Date Range** check box.
- To review a specific type of transaction (e.g. check in/out, modify item/patron, etc.), click the **Action** drop-down button, and click again to make a selection.
- To review all transactions associated with a specific worker, enter a worker's log in name or initials in the **Worker** field.

- To review all history for a specific person, enter a patron ID or barcode in the **Patron** field. If needed, click the **…** button to open the **Patron Lookup** dialog box where you can perform a search.
- To review all history for a particular item, enter an item ID or barcode in the **Item** field. If needed, click the **…** button to open the **Catalog Lookup** dialog box where you can perform a search.
- Your history list automatically updates when you make changes to the limiting fields.

Note: You can purge patron information using the **Review History** feature. Please refer to the next section, **History Obfuscator**, for more information.

History Obfuscator

In some states, libraries cannot legally maintain an extended history of patron activities. The **Review History** feature in Concourse maintains a record of patron actions traceable to the library's inception of Concourse, which could go back several years.

To comply with state laws, librarians can purge stored information from the Concourse database with the **History Obfuscator** feature.

Note: You must have the *Setup Program* worker permission enabled to use this feature.

1. Click the **ADMIN** button on the **Navigator Toolbar**.
2. Click the **Maintenance** button on the flow chart to open a shortcut menu.
3. Click **Obfuscate History….** Concourse prompts you to log out.
4. Click **Yes** to open the **History Obfuscator** dialog box.
5. Click one of the following options:
    - **Keep only last Patron for each item** – Only data related to the last patron that checked the item in or out will be kept.
    - **Remove from history records older than {number} {days/years}** – Specify the age of the patron history that you want to delete. You can specify the date quantity in days or years. For example, you may want to delete data that is more than 14 days old.
    - **Remove from all history records** – All item-related patron information will be deleted from the database.
6. Once you have made a selection, click **Begin**.

    Note: Clicking **Stop** during the process halts the procedure immediately. Either repeat the process, allowing it to run to completion, or exit the **History Obfuscator** dialog box and rebuild the history indexes. This prevents possible errors concerning patron or item history. Refer to the Concourse Help files for information about rebuilding history indexes.

7. When the process is complete, a success message displays. Click **Close** to exit the dialog box.

Bulk Functions

For your convenience, Concourse allows you to delete both patron and item records in bulk.

Bulk Deleting Patron Records

1. Click the **PATRON** button on the **Navigator Toolbar**.
2. Click the **List of Patrons** button on the flow chart. Concourse asks if you want to specify a filter.
3. Click **Yes** to open the **Select Patrons** dialog box.
4. Specify criteria for the patron records you want to delete and click **OK**. For more information about configuring this criteria, see the “Patron Reports” section in **Chapter 7**.

   Tip! You could click the **Patrons in Class:** check box, and then select **Graduated** from the drop-down list if applicable to delete the records of all patrons who graduated.

5. A **Please Wait … Processing** dialog box displays while search results are being generated.
6. Once the report is built, review the displayed patron names. Make sure that you need to delete every patron record that is shown. If you see a patron record that you would like to remove from the list so that it is not deleted, perform the following steps:
   - Click the numerical row header to select the entire row. The first field will not be highlighted.
   - Press the **Delete** key on your keyboard. The record is removed from the report list, but not the database.
7. Click the **Bulk Delete** report toolbar button .
8. Read the information on the confirmation box that opens. Click **Yes** to continue; otherwise, click **No**. The **Enter Password** dialog box opens.
9. You must enter a name and password in the corresponding fields for a worker who has the *Bulk Delete* permission enabled. Then click **OK**. If there are no errors, the patron records are removed permanently from the database.

   Note: Patron records with outstanding fines or items out cannot be deleted. If you have attempted to delete a record that has these restrictions, a message box displays at the end of the process that states the number of patrons that were not deleted and the restrictions that applied. Click **OK** to close this message box, and contact the patron(s) to clear up any outstanding issues.

Bulk Deleting Item Records

The bulk delete feature is enabled for the **Accession List**, **Shelf List**, **List of Titles**, and **Titles Sorted by Author** reports.

1. Click the **REPORTS** button on the **Navigator Toolbar**.

2. Click the **Item Reports** button on the flow chart to open a shortcut menu.
3. Click one of the aforementioned report options. Concourse asks if you want to specify a filter.
4. Click **Yes** to open the **Build Filter** dialog box.
5. Specify the criteria for item records you need to delete and click **OK**. For example, you may want to delete the older item records in your database by specifying the filter **Copyright is less than or equal to 1950**. See the “Building a Filter” section in **Chapter 7** for more information.
6. Once the report is built, review the displayed item records. Be certain you want to delete every record shown. If you see an item record you want to keep, perform the following steps:

    - Click the numeric row header to select the entire row. The first field will not be highlighted.
    - Press the **Delete** key on your keyboard. The record is removed from the report list, but not the database.

7. Click the **Bulk Delete** report toolbar button .
8. Read the information on the confirmation box that opens. Click **Yes** if you would like to continue; otherwise, click **No**. The **Enter Password** dialog box opens.
9. You must enter a name and password in the corresponding fields for a worker who has the *Bulk Delete* permission enabled. Then click **OK**. If there are no errors, the item records are permanently removed from the database.

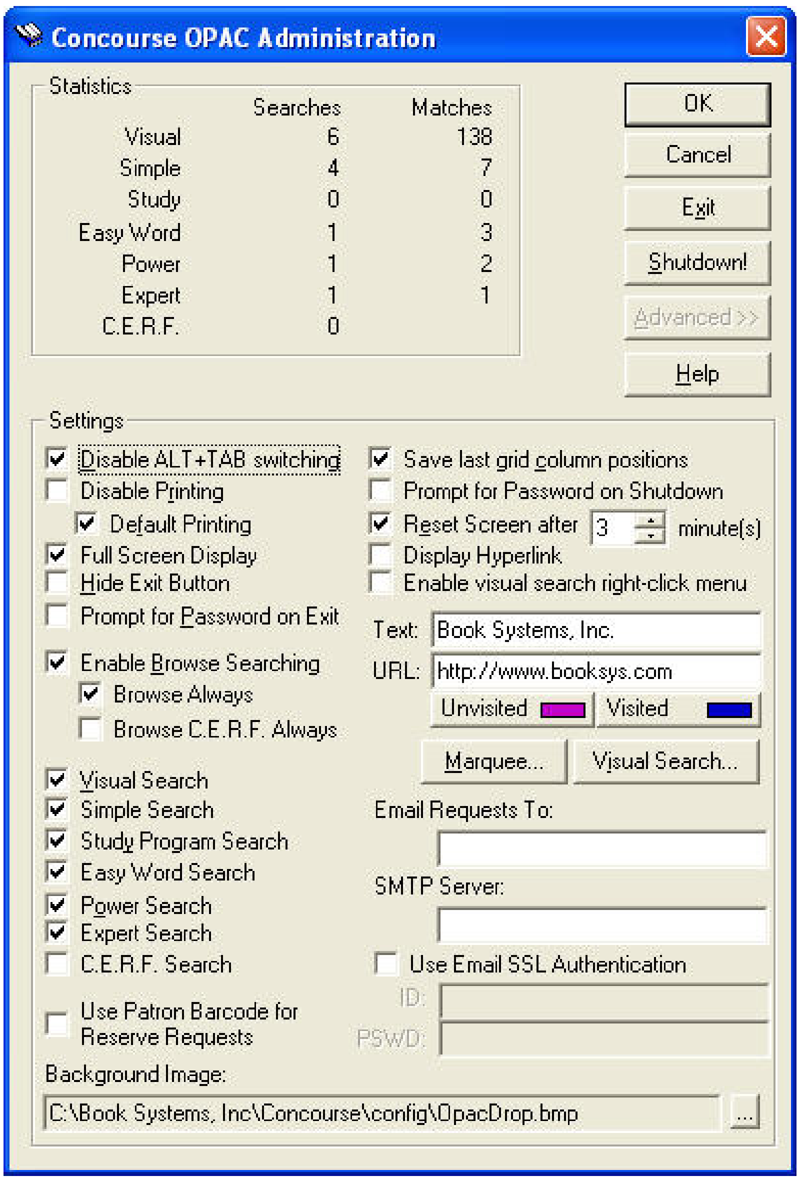
Note: Item records that are master records, checked out, on reserve, or that have fines attached to them cannot be deleted. If you have attempted to delete an item that has these restrictions, a message box displays at the end of the process that states the number of records that were not deleted and the restrictions that applied. Click **OK** to close this message box.

Chapter 9: OPAC

The **Online Public Access Catalog** (**OPAC**) provides patrons with easy access to your library's catalog database. Patrons are given the ability to search the database and to open attached media files. To facilitate the searching process, you can customize OPAC to reflect the needs of your patrons more effectively.

Configuration Options

The buttons on the **Concourse OPAC Administration** dialog box provide you with the ability to configure, modify, and/or shutdown OPAC. This dialog box can be opened by pressing **F10** five times from the main window within OPAC; however, all configuration options are limited to its **Advanced >>** extension, which only displays after you have entered a valid user name and password.



You can personally configure the appearance of several OPAC features. The following list mentions some of the configuration options that are available.

- Prevent patrons and unauthorized employees from gaining access to other programs that are running on your system by disabling **ALT+TAB** switching, hiding the **Exit** button, specifying a full screen display, prompting for a password on **Exit**, and/or prompting for a password on **Shutdown**.
- Set and restrict patron printing.
- Add search options and enable your patrons to browse for near matches if no matching search results are found.
- Change the main window display by adding a different background image, a scrolling marquee, or an Internet hyperlink.
- Reset the amount of time an inactive dialog box remains open before switching back to the main window.
- Add, edit, or remove images displayed in the **Visual Search** dialog box.
- Change the name and shortcut key of the **Visual Search** button located on the main window.
- Modify the results list that displays in the **Search Results** dialog box.

Several of the most important options are discussed in more detail in the following sections.

Changing the Main Window Display

Adding a Search

There are six *primary* searches in OPAC: **Visual Search**, **Simple Search**, **Easy Word Search**, **Power Search**, **Expert Search**, and **Study Programs Search**. By default, all of these search options display at the top of the OPAC main window. If needed, you can click appropriate check box(es) to remove a search option(s). If applicable, you can also click the **C.E.R.F. Search** check box to allow your patrons to search resources outside your library (requires subscription). When you click **OK** in the **Concourse OPAC Administration** dialog box, the buttons at the top of the display are changed accordingly.

Adding a Different Background Image

You can use any image to serve as the main window display. To change the default image to a digital picture of your library, for example, save the picture as a .bmp, .gif, or .jpg file. Then enter the name and location of your file into the **Background Image:** field at the bottom of the dialog box; if needed, click the **…** button to access an **Open** dialog box where you can find your file and click **Open** to insert it in the field. When you click **OK** in the **Concourse OPAC Administration** dialog box, your picture becomes the new background.

Adding a Marquee

To inform patrons of upcoming events or new releases, you can add a scrolling marquee. Create or edit a marquee by clicking the **Marquee…** button to open the **Edit Marquee** dialog box.

The **Display Marquee** check box, which enables the **Marquee Text**, is selected by default. A **Clear All Text** button is located at the top of the dialog box. If you decide to change the text that you have entered, click this button to clear it and begin again. Highlight text to replace or insert your cursor where you want to add text; select the format you need from the **Text** drop-down list, and then type your text. The formatting options are described below:

- **Top Level Title** – This text is **red underlined** and designates a main heading. You might like to enter your library name or a short welcome message with this format.
- **Top Level Group** – This text is **yellow** and designates a secondary heading. If you'd like the scrolling marquee to inform your patrons of a particular community event, for example, you might want to enter **Community News** using this format.
- **Group Title** – This text is **turquoise** and is slightly smaller than the previous formats. This title designates a tertiary heading. You might want to use this format to add the actual community event, for instance, **Pancake Breakfast**.
- **Normal Text** – This text is **white** and consists of the smallest font. This is generally used to add more detailed information. Continuing the previous example, you might want to add two or three new lines using this format to state the date, time, and location of the event.

When you are finished changing your message, click **Close** to dismiss the **Edit Marquee** dialog box. The **Concourse OPAC Administration** dialog box is still open; click **OK** to close the dialog box and view your new marquee at the bottom of the main OPAC window.

Adding a Hyperlink

Important! You must have a working Internet connection to use this feature.

You can easily provide your patrons with the ability to automatically open a designated site on the Internet from your main window. When they click the hyperlink, the Web page specified here opens in the default browser.

Click the **Display Hyperlink** check box to enable this feature. After this check box is selected, you may enter a name and location for the site in the **Text:** and **URL:** fields.

For example, to display a link to children's poetry, click the check box and enter **Poetry Fun Page** in the **Text** field and **http://www.gigglepoetry.com** in the **URL**: field. **Poetry Fun Page** would then display on OPAC's main window. When your patrons select the text, OPAC automatically opens the **Giggle Poetry** home page.

You can also select the color of your link. You can choose separate colors to differentiate an unvisited link (one that has not been selected) from a visited link (one that has been selected at least once). Simply click either the **Unvisited** or **Visited** button to open a **Color** dialog box. Choose any color from the default options or customize a color by clicking **Define Custom Colors**.

Resetting the Main Window

If a patron steps away from an open dialog box to find some of the items in his/her search results, OPAC resets to the main window after a specified amount of time. You can easily change the designated time before the main window reopens after inactivity by clicking the **Reset Screen after {number} minute(s)** check box and entering a time in the appropriate field.

Modifying Visual Search

Many **Visual Search** features can be modified. You can change the name of the **Visual Search** button located on the main window, change the key associated with the keyboard shortcut, and change the HTML associated with each search.

Changing the Visual Search Button and Shortcut Key

The name of the button and shortcut key are changed simultaneously from the **Visual Search Setup** dialog box. Keep in mind that your changes only pertain to the name of the button. All windows and dialog boxes associated with **Visual Search** remain the same.

On the **Concourse OPAC Administration** dialog box, click the **Visual Search…** button to open the **Visual Search Setup** dialog box. The first field of the dialog box contains a reference to both the button and its shortcut key(s). The ampersand (**&**) in the field precedes the key you need to push in addition to **ALT** to access **Visual Search** through the keyboard. Since the default reads **&Visual Search**, the default keyboard shortcut is **ALT+V**.

If you need to make a change, enter a new name in the field at the top and insert the ampersand before the letter of the key you would like to represent the shortcut. Your shortcut possibilities are automatically limited to prevent the repetition of other shortcuts in the program. If you need to eliminate the shortcut, simply delete the ampersand from the field. You can also click **Cancel** without clicking **Save this change** if you want to keep the default.

For example:

- If you type **&Image Search**, a button called **Image Search** would replace the **Visual Search** button on the main window display, and the new shortcut **ALT + I** would give you access to the **Visual Search** option.
- If you typed **I&mage Search**, the button would still be called **Image Search**, but you would have to press **ALT+M** to gain access to **Visual Search**.

- If you typed just **Image Search**, the button's name would be changed to **Image Search**, but no shortcut would be available.

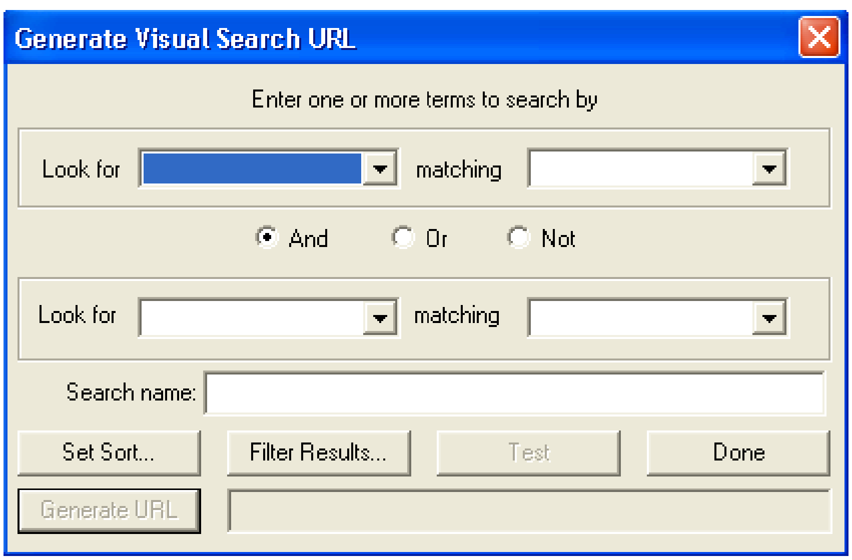
Changing the Visual Search Pages

Visual Search is an HTML-based patron interface. Various HTML pages must be written before you attempt to transfer them into **Visual Search** and must contain the proper links for each image or term.

Warning! You should not attempt to modify **Visual Search** pages unless you have prior experience with HTML.

Since **Visual Search** is an HTML-based search engine, you need to associate a URL for each new search in order for it to work properly. To create a URL for a search term, enter the location of the HTML file you would like to use in the field provided and click the **Generate Search URL** button. If you are unsure of the file's name or would like to recall your options, click **Browse…** to specify the location of your file. The **Browse…** button can also be used to locate the **Visual Search** defaults if you change your mind and would like to reset them.

When the **Generate Visual Search URL** dialog box opens, you can enter your criteria using the fields, drop-down lists, and radio buttons provided and enter a name for this search in the **Search name:** field. Make sure that the criteria entered matches the search information found in the HTML file you are referencing. If needed, you can join two search terms with a Boolean operator.



For example, if you want OPAC to produce a list of items containing the words **FAITH** and **PRAYER** when your patron clicks an image of folded hands, you must first design the appropriate HTML page and load it into your computer. After you have entered the page's location in the **Visual Search Setup** dialog box, generate a URL for your search by clicking the **Generate Search URL** button.

When the **Generate Visual Search URL** dialog box opens, select **Keyword Search** from the first drop-down list, and enter **FAITH** in the corresponding field. Then select **Keyword Search** from the second drop-down list and enter **PRAYER** in the corresponding field. Join the two search terms by clicking the **Or** radio button.

You can sort and/or filter your search results by clicking **Set Sort…**, which opens the **Advanced Sort** dialog box, or clicking **Filter Results…**, which opens the **Limit Search Results** dialog box.

Click **Test** to preview the results list. When you close the **Search Results** dialog box, you return to the **Generate Visual Search URL** dialog box so you can make changes if needed. If you are satisfied with the results list, click **Generate URL**. The URL automatically displays.

Remember that the button only generates the URL for your search. To use the generated URL effectively, you must copy and paste the URL into your HTML page(s). That way, when your image is selected, OPAC will search all fields of the database's records for the keywords **FAITH** and **PRAYER**.

Modifying the Results Display

Search results are displayed in the **Search Results** dialog box. If you need to eliminate certain fields, prefer a different field order, or would like to change column width, you may do so by clicking the **Save last grid column positions** check box on the **Concourse OPAC Administration** dialog box. Click **OK** and run a search using any of the search options. Make the adjustments within the **Search Results** dialog box, and then go back to the **Advanced >>** extension of the **Administration** dialog box to deselect the **Save last grid column positions** check box. Click **OK** again to save your changes.

Manipulating Columns

When you place your cursor (white arrow) between the column headings located in the **Search Results** dialog box, it changes into a bidirectional arrow, and as you move it, a line displays to mark the new width of the column.

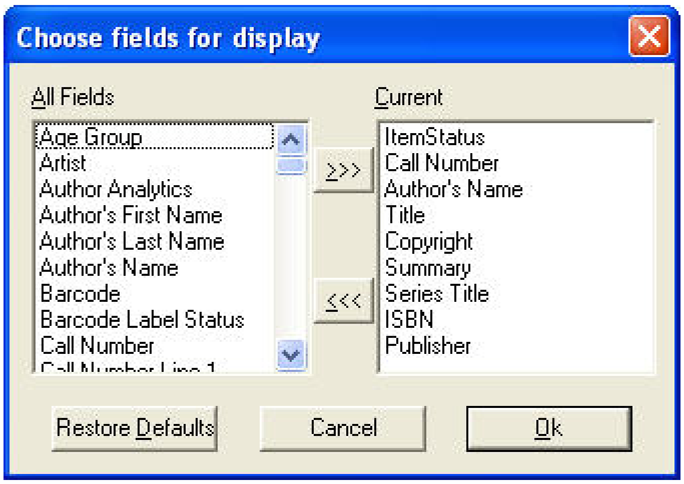
For example:

- To accommodate items with long titles, you can make the **Title** column wider. Click the divider line between the **Title** column and the **Copyright** column. Drag the divider line to the right to expand the **Title** column.
- If patrons do not need to be informed of each item's ISBN number, remove the column from your results list altogether. Click the divider line between the **ISBN** column and the **Publisher** column, and then drag the line to the left until the column completely disappears. To make the column display again, double-click the divider point.

Choosing Fields for Display

You can customize the **Search Results** dialog box even further by choosing the database fields you want to display. The fields correspond to the column headings of the results list. For example, to add a **Location** column to the results list so your patrons know exactly where to find their item, use the **Choose fields for display** dialog box.

First, press the **Ctrl** key while *right*-clicking a column heading in the **Search Results** dialog box. The **Enter Administration Password** dialog box opens, where you must enter a valid user name and password. Click **OK** to open the **Choose fields for display** dialog box. The current fields are listed on the right side of the dialog box, and all other available fields are listed on the left.



For this example, click the **Location** field from the **All Fields** list and click **>>>** to add it to the **Current** list. By default, the new field is added to the bottom of the list. If needed, rearrange the fields by clicking and dragging them to a new position. When you are finished, click **Ok** to close the dialog box and save your changes. A **Location** column displays in your search results.

To remove the **Location** column from your results, return to the dialog box and click **Location** from the **Current** list. Click **<<<** to transfer it back to the **All Fields** list. Click **Ok**. The dialog box closes, and the column is removed from your results.

Restoring the Defaults

If you resize the columns or alter the fields of the **Search Results** dialog box and later need to return to the default display, you can restore the original appearance of the dialog box by clicking the **Restore Defaults** button located in the lower, left-hand corner of the **Choose fields for display** dialog box. A message displays asking you to confirm this change. Click **Yes** to continue.

Product Support

If you have questions about any Concourse feature that this document or our additional resources don't answer, please call Book Systems' Technical Support Staff at (888) 289-1216. You may also send an e-mail to support@booksys.com. Business hours are Monday through Friday, 7 a.m. – 7 p.m. Central Standard Time.

Concourse QuickStart Guide Index