

# User's Guide

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# Chapter 1: Getting Started

Welcome to Concourse®— the library automation system that allows your school, church, or library to put your card catalog online, attach multimedia files to your records, stay abreast of patron interests, handle fines, build reports that will help you maintain and track your collection, and much more.

In addition, Concourse is fully integrated with other Book Systems products, such as eZcat®, which allows you to locate and download free MARC records over the Internet, and **OPAC** (Online Public Access Catalog), which allows your patrons to view the catalog from a computer in your library or online.

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## Learning Concourse

You have the option to install a demonstration database with Concourse. You can use the item and patron records in this database to practice performing circulation transactions and more. While working within the demonstration database, you can freely add or delete records and configure circulation types (as well as other item classes).

**Warning!** Do not build your working database over the demo version. When you are ready to begin building your database, reinstall the *full version* of Concourse, either on another computer or in a different directory. If you reuse your installation directory, uninstall the Concourse demonstration database and manually delete any remaining folders; then install the full version of Concourse.

## Training

Book Systems offers training classes for Concourse. You can either attend classes at the Book Systems office in Huntsville, Alabama, or you can arrange for on-site training for you and your staff. You may also be able to schedule training using iLinc.

If you need to register for training, contact your Book Systems Account Manager at 1-800-219-6571, or visit us online at [www.booksys.com](http://www.booksys.com) for scheduling and pricing.

## Manuals

You can open this User's Guide, the QuickStart Guide, and the Demo Guide from the **Help** menu in Concourse's menu bar. These manuals are in PDF format and require Adobe® Acrobat® Reader® to view them. If needed, consult the Adobe Help files for information about using that product.

## Using Help

The Concourse Help files are designed to walk you through any procedures that you may need to perform. Simply press the **F1** key from the dialog box that you are working with to access a relevant Help topic.

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## Accessing the Program & Logging In

The first thing you need to do after you finish installing Concourse is run the program and log in. You can access Concourse in the same manner as you would any other Windows program. You can double-click the icon on your desktop or navigate to the program from the **Start** menu. If you did not change the program group during installation, you can open **Concourse** by clicking the **Start** button in your taskbar and then clicking **Programs | Book Systems, Inc. | Concourse** from the menu.

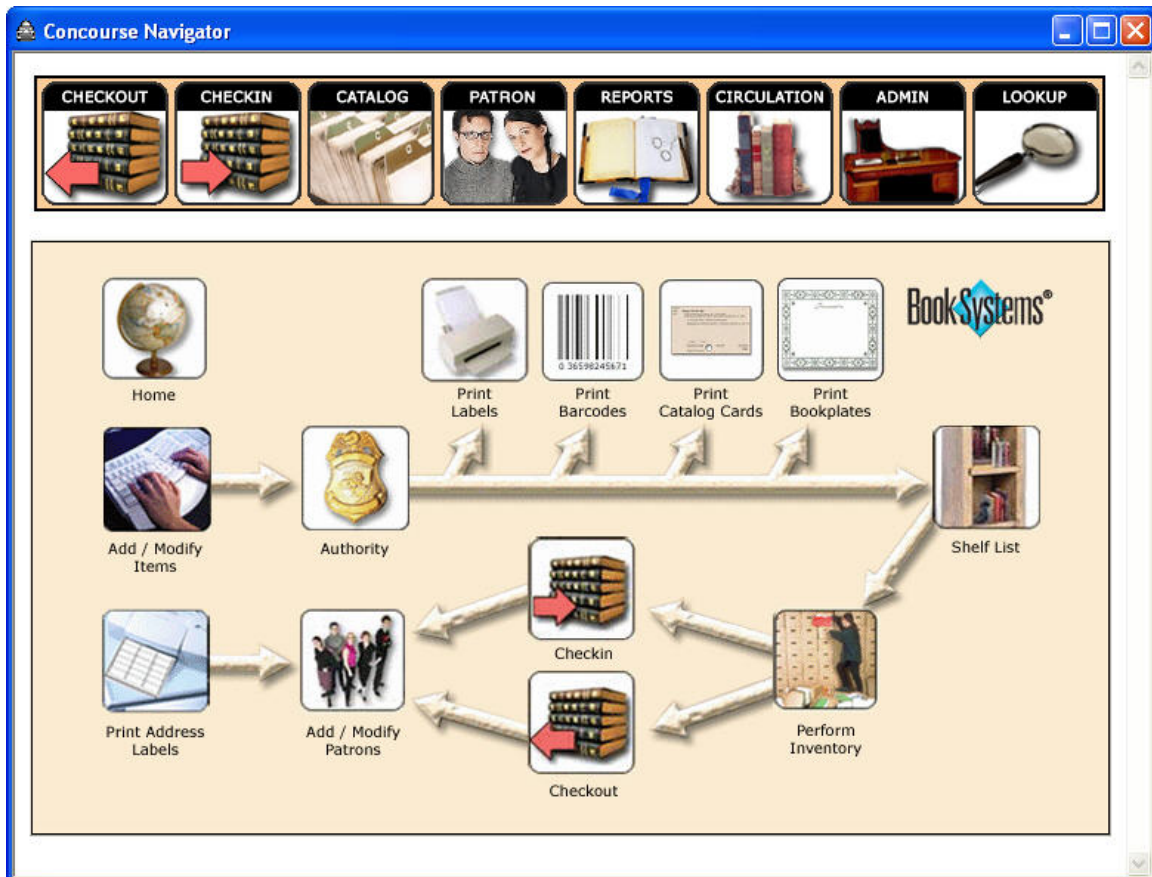
When you start the program, the first thing that you see is the Concourse splash screen:



Wait a few seconds for the splash screen to close or press any key on your keyboard to dismiss it. Following the splash screen, the **Concourse Login** dialog box opens. Enter the delivered log in name (**MLS**) and password (**SETUP**) in the appropriate fields and click **OK**.

After you have logged in successfully, the **Tip of the Day** dialog box opens, displaying a random suggestion you might find helpful. To view another tip, click **Next Tip**; to disable this feature when you log in, click to clear the **Show Tips on Login** check box. When you are ready to exit the dialog box, click **Close**.

The **Concourse Navigator** (pictured below) displays with the **Navigator Toolbar** across the top and the **Home** flow chart beneath it. This is the navigation tool used in most steps in this document.



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 **Add/Modify Items** button to begin adding items to your catalog.

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.

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## Customize Concourse

Concourse includes a variety of features that you can customize to suit your own needs. You can configure your own keyboard shortcuts and switch from the **Concourse Navigator** to the classic **Graphical User Interface (GUI)** or the toolbar. You can also move the position of the toolbar. These features allow Concourse to reflect the library or school personality and conform to the needs of each individual user.

**Note:** Steps in this guide use the default **Concourse Navigator** where possible; some features are only accessible from the menu bar.

### From Concourse Navigator to Classic Navigation

Concourse includes several GUIs that you can choose for your Concourse. If needed, you can switch from the **Concourse Navigator** to another navigator style or to the toolbar.

- To display the toolbar, click **Window | Toolbar** from Concourse’s menu bar. If needed, you can minimize the navigator when showing the toolbar.
- To replace the **Concourse Navigator** with another GUI navigation option (Concourse 6.1 Navigator, Classic, or Cool Blue), click the **ADMIN** button on the **Navigator Toolbar**, click the **Maintenance** button on the flow chart, and then click **Configuration Setup....** When prompted to log out, click **Yes**. When the **Configuration Setup** dialog box opens, click the **Navigation:** drop-down button, and click again to select a different option.

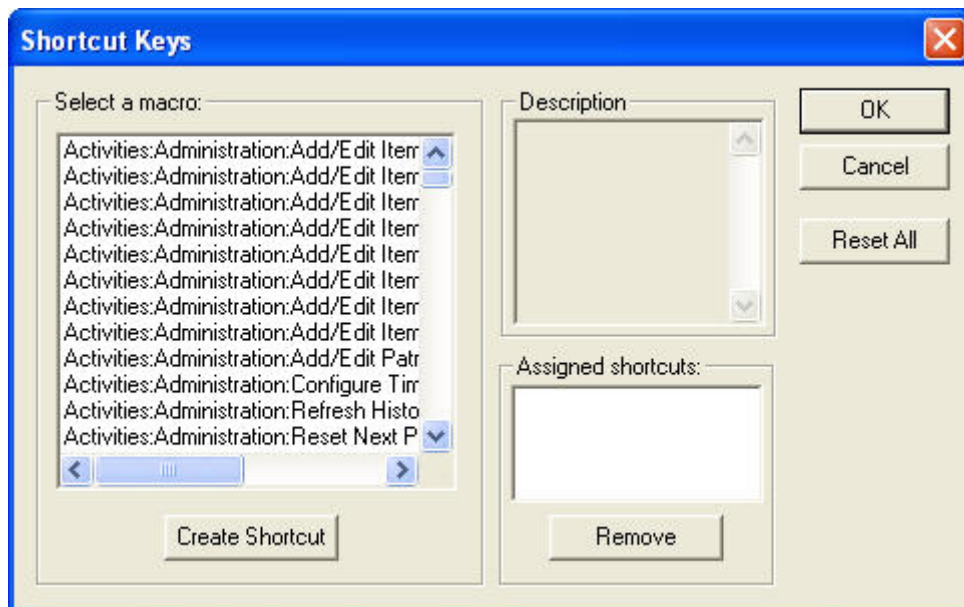
### Keyboard Shortcuts

You can create your own keyboard shortcuts to execute commands and access features in Concourse. This feature is designed for more advanced users, such as full-time catalogers who are constantly performing data entry. Shortcuts allow the user to perform functions quickly by eliminating keyboard-mouse change over time. Skilled users are also spared the need to look away from the materials that they are cataloging to point at items on the screen with the mouse.

**Note:** Keyboard shortcuts are assigned *per worker*, so each worker in the library can use the shortcuts that are most useful or comfortable for him/her.

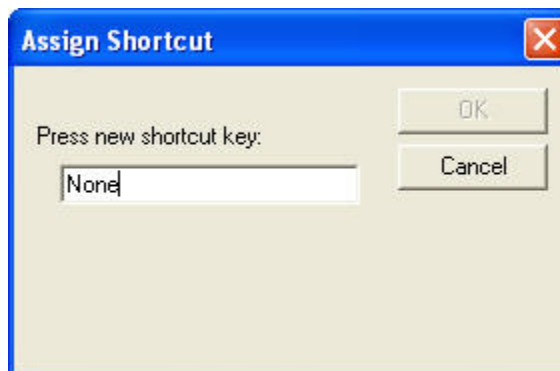
Do the following to customize your shortcuts:

1. Click **Edit | Shortcuts...** from Concourse's menu bar to open the **Shortcut Keys** dialog box. A list of functions, or macros, describing all actions you can perform in Concourse is on the left side of the dialog box. When you select a macro, the **Description** section to the right lets you know which action the macro performs.



2. Click a function from the **Select a macro:** list.

3. Click the **Create Shortcut** button to open the **Assign Shortcut** dialog box. The word **None** displays in the **Press new shortcut key:** field if no shortcut is currently assigned to the macro. If you are editing an existing keyboard shortcut, the original shortcut displays.



4. Press the key(s) you want to associate with the shortcut. For instance, to make **F9** a shortcut key, press **F9**. You can also assign key sequences, such as **Ctrl + F9**. Once you press the key(s), its current assignment displays below the field. If the key you specified does not have a macro assignment, **Unassigned** displays in parentheses under **Current Assignment**. If the key is assigned to another macro, select another shortcut key or assign the key to the new macro, which automatically removes it from the previously assigned macro.

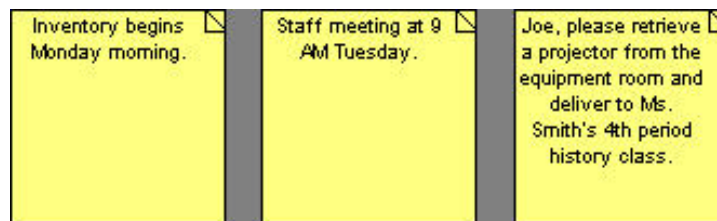
**Note:** Because the **F1** key is reserved for opening the Concourse Help files, you cannot reassign this key.

5. Click **OK**. The shortcut displays in the **Assigned shortcuts** section of the **Shortcut Keys** dialog box.  
**Note:** To remove the assigned shortcut, click to highlight the shortcut in the **Assigned Shortcuts** section and click **Remove**.
6. After configuring your shortcuts, click **OK** to keep your changes; otherwise, click **Reset All** and then click **OK** to discard your changes.

## On-screen Notes

You have the ability to add notes to your screen that display while Concourse is running. Any notes that exist within the system display after someone logs in to the program. From there, the notes remain as various users log in and out of Concourse; notes are cleared only after Concourse is closed.

Keep in mind that notes are displayed globally to all workers across your network, so you should be careful about including negative comments about a worker or patron. You would most likely enter reminder messages or work-related phone messages; see the images below for some examples:



To add a note, click **Window | Notes | Add Note...** from Concourse's menu bar. A **Post Note** dialog box opens, where you can enter your text in the **Note:** field and then click **OK**. A yellow note displays your message text.

**Note:** Your message is limited to the space of the **Note:** field.

After you have added a note, you can right-click on the note to access the **Notes** menu even if you are logged out of Concourse. From this menu, you can add new notes, edit existing notes, remove notes, and stack (arrange) notes in the upper, right-hand corner of your screen. If the notes are stacked, you can click on any one of the notes to bring it to the top of the stack.

You can move the note around on your screen by clicking and dragging it; you can even move it outside of the boundaries of your Concourse window.

**Note:** For more information about this feature, search the Concourse Help index for the keyword **Notes**.

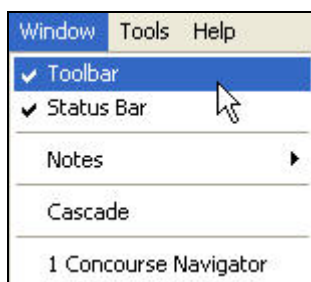
## Manipulating the Toolbar

The toolbar is an alternate way of accessing Concourse functions. If you choose to display the toolbar, it docks on the right side of your program window by default. All of the commands that are available in the toolbar are available through the menu bar and the **Concourse Navigator**.

You can choose to move the toolbar to the middle of the window or dock it to the left, top, or bottom border.

### Display the Toolbar

1. Click **Window** from Concourse's menu bar.
2. Click the **Toolbar** command to enable this element. The **Window** menu closes.
3. If you change your mind and need to disable the toolbar, simply click **Window | Toolbar** again. A check mark denotes that it is enabled.



4. Click to disable. The **Window** menu closes.
5. To move the toolbar, do one the following:
  - Click and hold the toolbar border and drag it to a new location.
  - Dock your toolbar by releasing it on any edge of your program window.
  - Make your toolbar horizontal by moving it away from the right or left edge.
  - Transform the toolbar into a toolbox with its own title bar by releasing away from a program edge.

**Note:** If needed, right-click the title bar to access a shortcut menu from which you can choose to either **Move** or **Hide** the toolbox. To close the toolbox, click the close button **[X]** in the upper, right-hand corner of the toolbox.

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## Program Overview

This section provides a quick summary of all the features that are included in Concourse as well as additional licenses/features that you may purchase.

### OPAC

Concourse is packaged with **OPAC**, a separate interface that gives your patrons limited access to the information in your database. With **OPAC**, you can allow your patrons to search for materials, print records, and review attached multimedia files.

## Cataloging

Instead of using MARC numbering tags, Concourse replaces tags with descriptive field names that make building bibliographic records easier. However, Concourse Pro<sup>®</sup> is available for customers who prefer to work directly with MARC format; this option is designed for librarians that understand MARC tags, fields, and subfields.

## Patrons

Your patron records will help keep you informed of changing contact information with two sets of demographics: the primary demographics as well as alternate demographics for patrons who may have a permanent and temporary address and contact information. Concourse even allows you to attach photographs of your patrons to their records with the aid of a digital camera or a disk provided by someone, such as a school photographer.

You can include a list of the patron's hobbies and interests in the **Notes** field; you will see the notes during check out so that you can chat with the patron and recommend new materials that might be of interest. Include **Alert** messages in your patron records so that you are warned of potential problems with patrons before they check out materials. For instance, if you have a warning that a patron frequently returns damaged items, you may take a moment to assess the condition of the check out materials and attach a message to each item record.

## DoubleChecking

The **DoubleCheck** feature is included with Concourse so that a supervisor or administrator can review item or patron records added or modified by volunteers or part-time workers. This feature helps you keep your database consistent (e.g., all names entered in **LastName, FirstName** format), which is important for accurate reporting.

## Form Letters (requires a Level 3 Concourse license or higher)

Concourse provides several pre-configured form letters and also offers you the ability to write your own to send your patrons overdue and unpaid fine notices, messages about upcoming events, and more. You can write one letter with merge fields that pull unique information directly from patron records, so that each letter sent to a group of patron records is customized with the patron's name and any material(s) that he or she has overdue, reserved, etc.

## Circulation (requires a Level 3 Concourse license or higher)

Circulation periods are handled automatically, based on your circulation types, patron classes, and due dates. These settings allow Concourse to accrue overdue fines automatically. During check in and check out procedures, supervisors and administrators with the correct worker permissions enabled have the ability to override normal circulation rules and apply special due dates and special check in dates.

When you load a patron record into your **Circulation Desk** (check out) dialog box, you are reminded of items that the patron has on reserve in addition to any **Alert** messages on the patron record. You can reserve items from the check out dialog box. You can process or waive payments, estimate fines, and assess fines from both the check out and check in dialog boxes

When you click the **CHECKOUT** button on the **Navigator Toolbar**, the **Circulation Desk** opens. You can check out items, assess fines, or review the patron's account in this dialog box. From here, you also can process or estimate fines for the patron.

Click the **CHECKIN** button on the **Navigator Toolbar** to open the **Circulation -- Checkin** dialog box. You can check in items and assess, process, or estimate fines for the patron returning those items.

### **Lookup**

Concourse offers four different search options. You can use **Easy Word Search** to look for a single word/phrase, **Expert Search** to find items using a combination of words/phrases, **Barcode Search** to locate an item that matches a specific ID/barcode number, or **Study Programs Search** to look for items assigned to specific reading programs, such as **Accelerated Reader**.

### **Reports**

Concourse can generate many different types of reports (availability depends on your level of Concourse and what additional licenses you may have). You can customize any of the patron, catalog, message, or circulation reports to fit your specific needs by using a filter. Any of the six statistics reports can be filtered by date. Most of the reports can be customized to display only the patron or item data that you need to see.

If needed, you can save the current filter/customization of many reports so that anyone on your staff can regenerate it as needed.

### **Administration**

Concourse lets you configure your Item Classes, Patron Classes, Item Types, and Worker Records. You can also review your transaction history, sorting results by worker, item, date, or type of transaction. There are also maintenance options for rebuilding index, configuring setup options, backing up your database, and more.

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## **Additional Licenses and Features**

There are several additional licenses, features, and equipment that you can purchase from Book Systems to cater to the specific needs of your library. The following list gives you an idea of what features are available. Contact your Book Systems Account Manager for more details and pricing information.

### **Network**

If you have more than one computer and you plan to run multiple copies of Concourse and **WebOPAC** simultaneously, you need to purchase a **NETWORK** license.

### **Barcodes**

If you want to print your own item or patron barcodes, you need to purchase a **BARCODE** license. In addition, you can purchase blank or pre-printed barcode labels from Book Systems.

## **Slip Printing**

If you are going to be using a receipt tape printer, you need to purchase a **SLIP** license. You may also purchase a slip printer from Book Systems.

## **P-Link (Patron Import)**

If you want to import patron records from a text file, you need to purchase a **PLINK** license. This feature allows you to build a custom profile that can read the import file regardless of its format, so you can import patron data from a text file generated from any source, such as a database or spreadsheet. If needed, you can configure Concourse to run **P-Link** at start up.

You can also choose whether to automatically import a file to **P-Link** whenever the patron information file changes or at timed intervals that you specify yourself.

## **Authority**

To implement authority control for items in your database, you need to purchase an **AUTHORITY** license. Concourse supports name authority and subject authority. This module is not available in Concourse Pro.

## **Importing Records**

With an **IMPORT** license, you can import MARC records into Concourse without having to purchase or upgrade to a Level 4 or Level 4 Network license. With the ability to import MARC records, cataloging becomes easier and faster.

## **Concourse Commuter**

This includes a hand-held computer that works with Concourse, along with the software needed for setup. Commuter allows you to quickly scan and upload barcodes to complete transactions.

## **eZcat or eZcat Pro<sup>®</sup>**

Book Systems offers eZcat as an additional program that allows you to connect to other libraries through the Internet. You can connect to any catalog with a Z39.50 server to search for and download MARC records, clean certain tags, and then export those records to a file or directly to Concourse. The same basic features are included in eZcat Pro, which also includes the added ability to edit the imported MARC records.

## **OPAC**

**Concourse OPAC** is an additional program delivered with Concourse that allows patrons to view your library catalog on machines in your library; you can also customize your OPAC from this interface. You can also purchase **WebOPAC** so your patrons can access your catalog via an Internet Web site set up for your library, so they can open the catalog, browse your holdings, and more from *any* computer with Internet access. In addition, Book Systems, Inc. offers Web site themes to match a season or holiday. You may also obtain custom themes that are suited specifically to your library.

## **Additional Features:**

### **Bookmobile**

Use this feature to import files from an outside source for use in the Main Library. For instance, you may have a travelling bus that visits elementary schools or retirement villages where patrons are allowed to check out books. You can use the **Bookmobile** feature to process these transactions into your Main Library database.

This process can be performed only once a day and applies to the following circulation functions: checking items in/out, renewing items, reserving items or canceling reserves, waiving and assessing fines, recording paid fines, and marking items found.

### **Inventory**

With Concourse, you will no longer need to close your library for inventory. Instead, you can build a customized inventory list so that you can perform inventory one section at a time. To make inventory easier, you can mark items lost and found at any time, enabling you to keep your database as current as possible. You also have the option of using a portable barcode reader or a Palm Pilot equipped with a scanner.

### **Barcode Readers**

To reduce hand-keying of item ID/barcode numbers for check in/out and inventory procedures, you can use a barcode reader. You do not need a special license to use a barcode reader, but you must have the correct equipment. Concourse works with the American Microsystems Model 2800.

Although other barcode readers may interface with Concourse, we cannot guarantee their performance or provide technical support for different models and/or brands.

## Chapter 2: Basic Functionality

Before you begin using Concourse, there are some recurring features and functions that you should understand. The following bulleted list defines each of these features, which are explained in detail throughout this chapter.

- **Filtering** – If you have a large library, you probably do not want to perform tasks on the entire collection or on all of your patron records simultaneously. Performing tasks on large sets of data taxes your computer resources and slows you down. You can use filters to separate groups of item or patron records with common features to perform tasks more efficiently.
- **Grids** – Much of the information you see in Concourse displays in a grid that can be manipulated and customized. Learning the features and properties of this grid will help you to display only the information that is relevant to the task at hand.
- **Date fields** – All of the date fields in Concourse have the same format. They have scroll buttons so that you can move through the dates and a drop-down calendar from which you can select a date. Shortcut keys allow you to automatically set commonly-used dates, such as the current date and the beginning or end of the week, month, or year.
- **Windows functionality** – In general, you need a basic understanding of your operating system in order to use any program efficiently. If you are new to Windows, you should read the documentation included with your operating system. For your convenience, a few of the Windows-standard features that you often see in Concourse are summarized in this chapter.

### Filtering

Concourse allows you to perform the following functions more efficiently when you use filters: reporting, inventory, distributing form letters, printing spine and pocket labels, applying additional limits on search results, and double-checking. Examples are listed below:

- It is inventory time, and you want to start in the multimedia room. The first group of items you want to inventory is your collection of audio books. The specific steps to create a filter for audiocassette materials will vary based on the item classes set up in your Concourse database; you would filter using an item class that is singularly associated with audiocassette materials. For instance, if you have a report class named **AUDIO BOOKS**, your filter might be **Report Class equals AUDIO BOOKS**.
- Your supervisor asks you for a list of all items cataloged since the first of the year. You can choose any catalog report to build this list, for example, the **Accession List**, **List of Titles**, **Shelf List**, etc. In the **Build Filter** dialog box, select **Entry Date** from the first drop-down list, select **greater than or equal to** from the second, and then enter **Y** in the last field to put the first day of the year in the field automatically.

- You need to print spine and pocket labels for all of the items you cataloged today. When you are configuring your labels, you can click the **Filter** button to access the **Build Filter** dialog box. To add all of the items cataloged today to the **Items to Print** list, select **Entry Date** in the first drop-down list, select **equals** in the second, and then enter **T** in the third field to put the current date in the field.
- You are printing overdue slips that will be distributed by the homeroom teachers. This scenario would require some advanced planning. You would need to enter the homeroom teacher's name or some code for each homeroom in a designated field of each student record. If you configured the **Marital Status** field to display as **Grade Level** during configuration setup, you would most likely use the **Grade Level** field on the **Other Info** tab of the **Add/Modify Patrons** dialog box because this should change each year for students, just like the homeroom. This field allows 4 characters, so you could enter the grade level followed by a 2-character code for the homeroom, e.g., **04SM** for Ms. Smith's 4th grade class. You could also reserve one of the **User Defined** fields on this same tab for homeroom information, but you should make sure to use these fields consistently. To filter for Ms. Smith's 4th grade class, click the **Filter more** check box on the **Form Letter Print Wizard: Select Patrons** dialog box to access the **Build Filter** dialog box. Specify the following filter: **Grade Level equals 04SM**.

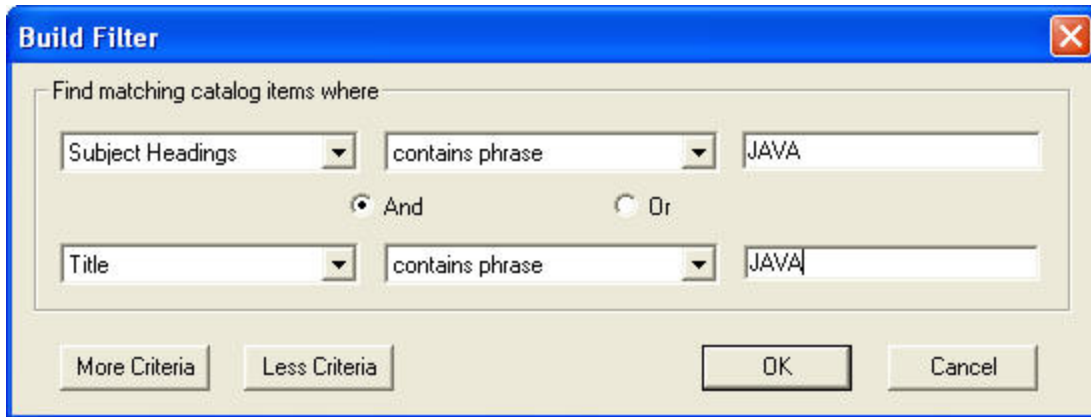
**Note:** This field does *not* auto-update, so any changes to a patron's status must be entered manually. Use the **Move Patrons** option to edit any user-defined fields that you have.

- You need to make sure that all of the seniors have turned in their library books and paid all of their fines before graduation. For this example, we will assume that the **Grade Level** is formatted in the same manner as the previous example. Filter a **List of Patrons** report. In the **Print Wizard: Select Patrons** dialog box, make sure that the **Select any patron that matches one or more of the checked criteria below** radio button is selected at the top. At the bottom, click **Patrons that have items Checked Out** and **Patrons that owe {amount} or more** and then enter **0.01** as the amount. If you have a grace period or if you do not charge fines, click **Patrons that are {quantity} to {quantity} days overdue** and specify a sufficient range of days. Finally, click **Filter more** to access the **Build Filter** dialog box and then enter the following filter criteria: **Grade Level contains substring 12**.

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## Build Filter Dialog Box

As you have seen in the previous examples, the **Build Filter** dialog box contains the following: data type, qualifier, and search term. In addition, you can click the **More Criteria** button to add another set of these to build additional filters. Multiple filters are combined with Boolean operators, which are discussed in detail later in this chapter.



In this example, the librarian has received a big demand for materials on JAVA, so she wants to review her collection on the subject in order to decide if the current selection is sufficient or if additional materials should be purchased.

### Data Type

This is the first drop-down list on the **Build Filter** dialog box. The options that are available in this drop-down list are dependent on the type of records you are filtering: item or patron.

If you are filtering item records, there is a data type available for every field and check box on the **Add/Modify Items** dialog box; therefore, you can search on any detail of an item record. To build a successful filter, the search term for any of these selected data types must be formatted in the same way that the information is formatted in the record.

**Note:** The **Barcode Label Status** and **Spine/Pocket Status** data type options, drawn from the check boxes in the **Print** box of the **Other** tab, have two valid search terms: **PRINTED** and **NOT PRINTED**.

In addition, the following data types are also available for item filters:

- **Checked Out To** – Searches for items that are checked out to a particular patron. For example, if the Thomas family is moving, you might filter for **Checked Out To contains phrase THOMAS** to locate the items that they need to return.

**Note:** The **equals** qualifier with the **Checked Out To** data type requires an exact match entry in the following format: **THOMAS, MILDRED(00001542)**, which is **LastName, FirstName(patron ID/barcode #)**.

- **Current Fine** – Searches for items with existing fine amounts, using dollars for search terms. For example, if you need to report the total outstanding fines for the library to the board of directors, you can enter the filter **Current Fine is greater than \$0.00**.
- **Due Date** – Searches for items that are due on a particular date; the search term field becomes a standard date-selection field (see the “Entering Dates” section later in this chapter). For example, if you forgot to set an alternate date on your **Due Date Calendar** for a holiday and want to generate a list of items that are due on that date, your filter might be **Due Date equals 07/04/2011**.

- **Estimated Fine** – Searches for items using the amount of an associated estimated fine. For example, you can search for all items with an estimated fine of **\$1.00** or more so that you can alert patrons to the status of their account.
- **Item Usage** – Searches for items that may have been used in certain areas at certain times, such as in your library for a program or presentation.
- **ItemStatus** – Searches for items that have a particular status. The only valid search terms are **DUE MM/DD/YYYY**, **LOST**, and **IN**. For example, use the filter **ItemStatus equals IN** to build a report of all items that are currently checked in.
- **Num Copies** – Searches for items that have a specified number of copies; the search term must be a number. This will find genuine copies created with the **Copyof** or **Add Copy** features only; duplicate records in the database are not counted. For example, if you want to sell extra copies of old best sellers that are no longer popular, you would enter the following filter: **Num Copies is greater than 1**.

**Note:** In this instance, you may also want to click the **More Criteria** button and choose the Boolean operator **AND** to include a filter for the copyright date; the filter might be **Copyright greater than or equal to 2000**.

- **Number of Reserves** – Searches for items that are on reserve for a specified number of patrons. For example, you may want to determine the materials that are popular so that you can place them on limited circulation or order duplicate copies; your filter might be **Number of Reserves is greater than 4**.
- **Patron's Class** – Searches for all items checked out to a certain patron class. For example, prior to the Christmas holidays, you can find all items checked out to a particular homeroom or grade level and then alert them that they need to return the outstanding items.
- **Reserved For** – Search for items that are on reserve for a specified patron. For example, if you want to verify that all of the items on the reserve shelf in your library are actually reserved for someone, you can use the following filter: **Reserved For is not empty**.

**Note:** The **equals** qualifier with the **Reserved For** data type requires an exact match entry in the following format: **BATES, ANNA(00001642)**, which is **LastName, FirstName(patron ID/barcode #)**.

- **Reserved for Barcode** – Searches for items reserved to a particular patron's barcode. If patrons have the same first and last name, you can search by barcode to find reserved items for the correct person.
- **Reserved for Name** – Searches for items reserved by a particular patron. If you are uncertain of the patron's barcode, you can search by name to find any items reserved for the patron.

Patron reports use unique filters with several pre-configured options on the **Select Patrons** and other dialog boxes; however, if you need to set even more specific criteria, you can click the **Filter More** check box to open the same type of **Build Filter** dialog box used for item reports.

There is a data type available for all fields on the **Add/Modify Patrons** dialog box; therefore, you can search on any detail of a patron record. To build a successful filter, the search term for any of these selected data types must be formatted in the same way that the information is formatted in the records.

**Note:** The search term used with **Family Of** must include leading zeros (e.g., enter **00001542** for the patron ID/barcode number 1542).

In addition, the following data types are also available for patron filters:

- **Amount Owed** – Searches for patrons that owe the specified amount in fines; the search term must be a dollar amount. If you select **equals, is greater than,** or similar qualifiers, Concourse automatically populates the search field with **\$0.00**.
- **Number of Items Out** – Searches for patrons that have the specified number of items checked out, regardless of overdue status; the search term must be a number. For example, at the end of the school year, your library may have a policy to waive fines that are less than \$1.00 for students that have returned all materials. To generate a list of students who qualify for the waiver, filter a **List of Patrons** report, and do the following in the **Select Patrons** dialog box:
  - Click the **Select only those patrons matching ALL of the checked criteria below** radio button.
  - Click the **Patrons that owe {amount} or more** check box and then enter **0.01** in the amount field.
  - Click the **Patrons in Class:** check box and then select **Student** from the drop-down list (or another pre-configured patron class associated with students).
  - Click the **Filter more** check box to open the **Build Filter** dialog box.
  - Enter the following filter: **Amount Owed is less than \$1.00**.
  - Click the **More Criteria** button to view another filter line; the **And** radio button is selected by default.
  - Enter the following filter: **Number of Items Out equals 0**. The resulting patron report will list only students that have fines of less than \$1.00 and currently have no items checked out.
- **Number of Items Reserved** – Searches for patrons that have a certain number of items on reserve; the search term must be a number.

### Qualifier

Qualifiers tell Concourse *how* the search term is associated with the data type.

**Tip!** For information about this feature, search the Concourse Help index for the keyword **qualifiers**.

- **begins with** – specify a word in a name or a title that begins with a certain letter. For example, you could filter for all patrons whose last name starts with **W**.

- **contains substring** – specify a word, partial word, or phrase; records must contain the letters in the correct order even if they fall within another word (e.g., **contains substrings cat** finds cat, cats, catastrophe, concatenate, truncate, communicate, etc.)
- **contains phrase** – specify a word or words; records must contain the exact word(s) in the correct order (e.g., **contains phrase cat** finds only results containing the singular word cat; records with the plural form, cats, and words containing the letters, such as communicate, are *not* included in the results).

**Note:** **Does not contain** is the inverse of **contains phrase**.

- **does not contain substring** – specify a word, partial word, or phrase contained in the data type field to exclude from your listing. For example, **Alert does not contain substring Suspend** lists all patron records that do not contain the letters **Suspend** (suspended, etc.) in the alert message.
- **ends with** – specify a word or other series of letters that would complete a word in a name or a title. For example, you could filter for all patrons whose last name ends with **-son**.
- **greater than or equal to** – specify a number, and Concourse searches for all records that have an amount equal to or larger than the one you enter.
- **is greater than** – specify a number, as in a fine or number of days overdue, and Concourse searches for all records containing a number that is larger than the one you enter.
- **is less than** – specify a number, as in a fine or number of days overdue, and Concourse searches for all records containing a number that is smaller than the one you enter.
- **less than or equal to** – specify a number, and Concourse searches for all records that have an amount equal to or smaller than the one you enter.
- **matches** – specify a term or phrase that is exactly the same as the data in the record. If needed, you can use wildcard characters in your search term. See the “Wildcard Characters” section later in this chapter for more information.

**Note:** **Does not match** is the inverse of **matches**.

- **equals** – specify a search term/value; fields in the records must be an *exact match*. You would not use this qualifier to filter the data type summary. You would only use this to filter dollar amounts, numeric values, or other data types that have precise values, such as item classes or item status.

**Note:** **Does not equal** is the inverse of **equals**.

### Search Term

This field is used to specify the word(s), phrase(s), or other values for which you are filtering. The required format for the search term depends on the selected data type; the required accuracy and completeness of the search term depends on the selected qualifier.

For example:

- The qualifier **equals** requires that the search term be an exact match, with accurate punctuation and spacing.

- The qualifier **begins with** requires only that the data type being filtered begins with the letters or word(s) specified in the search term.
- The qualifier **contains substring** requires only that the letters, words, or phrases display somewhere in the data type being filtered.
- The qualifier **greater than or equal to** works only with numeric values.

### **Boolean Operators**

Using the **Build Filter** dialog box, you can combine multiple filters with Boolean operators (**And/Or**). It is important to understand how to use the operators because if used *incorrectly*, they can produce no search results or unexpected results.

- **And** – Records must match the filter before and after the operator.
- **Or** – Records must only match one of the filters before or after the operator.

For example, if you are looking for recent materials for Adult and Juvenile patrons, the following filter would yield the correct results:

**Age Group equals ADULT**  
**Or**  
**Age Group equals JUVENILE**  
**And**  
**Copyright greater than or equal to 2010**

The first two filters combine all items in the **ADULT** age group with all items in the **JUVENILE** age group. These combined results are then limited by the copyright date.

The following filter would yield incorrect results:

**Copyright greater than or equal to 2010**  
**And**  
**Age Group equals ADULT**  
**Or**  
**Age Group equals JUVENILE**

The results would contain any materials that are classified in **ADULT** age group that were copyrighted during or since 2010 as well as all materials classified in the **JUVENILE** age group, regardless of copyright date. When you are building your search, put all filters joined with **Or** at the top and all filters joined with **And** at the bottom of the **Build Filter** dialog box; this technique retrieves the correct results in most instances.

## Wildcard Characters

When you do a filter using either **matches** or **does not match** as the qualifier, you are allowed to use special characters in your search term. This allows you to create one filter that will find various word forms.

- **Asterisk \*** – Use the asterisk to represent an unknown number of characters. This would be used to find multiple word forms or a range of numbers with one filter. For example, the filter **Summary matches comput\*** would find the words **computer, computerize, computed, computation**, etc., while **Call Number matches 92\*** would find all materials with Call Numbers from **920.000** to **929.999**.
- **Question Mark ?** – Use the question mark to represent a single character. This would typically be used to find alternate spellings, for example **Author's Last Name matches SM?TH** would find both Smith and Smyth.

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## Using and Customizing Grids

Most of the data lists that you use in Concourse display in a grid and have some common features. It is important that you know how to work with the grids so that you are able to use all of the information available.

### Scroll Bars

If the list is bigger than the grid window, you may see either a horizontal scroll bar at the bottom of the grid, a vertical scroll bar on the right side of the grid, or both. You can either click on the arrows at each end, or you can click and drag the scroll bar to move the list around within the grid window.

### Resizing Columns and Rows

In many grids, you can click and drag a divider in the header column or in the header row to resize the column to the left of the divider or the row above the divider. If this feature is available, your mouse cursor becomes a resizing tool when placed over a column or row divider.



Barcode	Author's Name
00000003	Austen, Jane.

If you drag the divider until it touches the previous divider (above or to the left), the column or row collapses or disappears. When you remove a row in this manner, the row number is also missing so you know it is currently hidden. You can double-click that divider to see the missing row or column again.

All of the rows on the **Review Items** and **Search Results** grids are kept at uniform heights; therefore, you cannot collapse or remove a row from these grids.

**Note:** When you are working with many of the *standard* reports (excludes the **Administrative** and **Statistics** reports as well as the **List of Patrons with Items** report), you can click to select a row and then press the **Delete** key to remove it. If you remove a row in this manner, you *cannot* double-click the row divider to bring it back. The rows are renumbered so that none of them seem to be missing.

### Clicking (primary mouse button)

Most of the time, when you click on a column, row, or cell in a grid, you highlight the column/row or select the cell (a bold border displays around the cell). If the cells are editable within the grid, as they are in the **Comparing** dialog box, you can either begin typing in the selected cell, or if a drop-down list displays, you can make a selection from that list.

If Concourse allows you to select a row or column in a grid, your cursor becomes a small selection arrow when placed on the header; once you see the arrow, you can click to select.



On the **Review History** and **Search Results** grid, you can click on a column header to sort the grid information. Click a column header once to sort in ascending order (from A to Z), and click a second time to sort in descending order (from Z to A).

### Right-clicking (secondary mouse button)

You can access shortcut menus from the following grids by right-clicking anywhere on a row: **Circulation Desk**, **Circulation -- Checkin**, **Review Items**, and **Review History**. These shortcut menus contain commands that are relevant to the data in the current dialog box and, when selected, are applied to the record (row) on which you right-clicked. These commands are also available via buttons on dialog boxes or menus where applicable.

You can right-click on a column heading of any report, except the **Administrative** and **Statistics** reports. The following sort options are available on this menu:

- **Sort Ascending** – sorts the selected column in ascending order (from A to Z).
- **Sort Descending** – sorts the selected column in descending order (from Z to A).
- **Advanced Sort...** – opens the **Advanced Sort** dialog box, where you can specify the primary, secondary, and/or tertiary sort columns, in addition to the order (ascending/descending).

**Note:** For information about these features, search the Concourse Help index for the keyword **sorting**.

Right-clicking on the column headers of the following grids opens the **Choose fields for display** dialog box: **Circulation Desk**, **Circulation -- Checkin**, **Inventory**, **Review Items**, **Review History**, and **Search Results**. You can use this dialog box to add more columns of information to the grid. Click the column(s) that you want to add from the **All Fields** list on the left; hold the **Ctrl** key while clicking to make multiple selections. After you have selected the field(s) that you want to add, click the **>>>** button to move the selection(s) to the **Current** list on the right. Click **Ok** to close the dialog box and update your grid; otherwise, click **Cancel** to discard your changes. At any time, you can open the **Choose fields for display** dialog box, and click **Restore Defaults** to return to the original columns.

**Note:** For information about this feature, search the Concourse Help index for the keywords **Choose Fields for Display**.

## Control + Click



The **Ctrl + Click** function provides a convenient way for you to review and modify records. This feature is available from the grid area of reports and inventory as well as from the circulation dialog boxes. You know that the feature is available when you place your cursor over a cell in the grid and see the **Ctrl** icon.

Press **Ctrl** while clicking on a row displaying a patron or item record, and the record opens in the **Add/Modify** dialog box for items or patrons. From there, you can review the record or make any necessary modifications.

**Note:** You can press **Ctrl + Click** within **Administrative** reports to first open a more detailed report related to the row you clicked, and from there, you can press **Ctrl + Click** again to open the appropriate **Add/Modify** dialog box as described above.

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## Entering Dates

All of the date fields in Concourse have a standard format. You can click in any part of the date field (month, day, year, or, if available, day-of-the-week) and manually enter a date, or you can use the scroll buttons, drop-down calendar, and shortcut keys for commonly used dates. The scroll buttons and drop-down calendar are easy to use and the shortcut keys are intuitive, so these features should help reduce your data entry time.

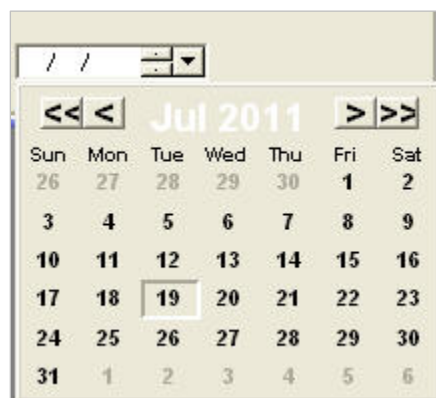
### Scroll buttons

Click within the month, day, year, or day-of-the-week portion of the date field as applicable. Once selected, click the up or down scroll buttons to move through the months, days, etc. until you see the correct date.

### The Calendar

If you need to see a calendar to determine the correct date, you can click the drop-down calendar button to make a selection. On the calendar, you see two sets of buttons at the top. Use these buttons to scroll to different months or years within the calendar.

- Click << to go backward one year.
- Click >> to go forward one year.
- Click < to go backward one month.
- Click > to go forward one month.



Click a number on the calendar to place it in the date field.

## Shortcuts

You can quickly enter the first or last days of the current week (Sunday/Saturday), month, or year by typing the first or last letter of the word (e.g., **YeaR**; **Y** for Jan 1 and **R** for December 31). You can also quickly enter the current date by typing **T** for **Today**.

**Note:** These shortcuts do not work within the **Due Date Calendar**.

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## Windows-Standard Features

Many of the properties related to dialog boxes, fields, and menus in Concourse are based on standard Windows functionality. If you are having trouble navigating your system, please read your operating system documentation or consider enrolling in a course covering the basics of the Windows operating system.

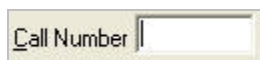
### Edit features

When you click **Edit** from Concourse's menu bar, the following Windows-standard features are available:

- **Undo** – removes the last change you made in the selected field. You can also press **Alt + Backspace** or **Ctrl + Z** to perform the **Undo** command.
- **Cut** – removes the selected text from the current field or dialog box and places it on the system clipboard so that it can be pasted to another location. You can also press **Shift + Delete** or **Ctrl + X** to perform the **Cut** command.
- **Copy** – copies the selected text from the current field or dialog box and places it on the system clipboard so that it can be pasted to another location. The selected text is not removed from its current location as when the **Cut** command is used. You can also press **Ctrl + C** to perform the **Copy** command.
- **Paste** – places the cut or copied information on your system clipboard into the selected field or cursor location. You can also press **Ctrl + V** to perform the **Paste** function.

### Edit fields

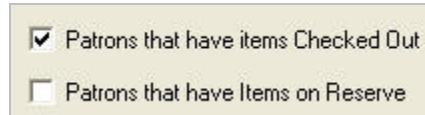
Edit fields are boxes within Concourse in which you can scan or manually enter data. You can access an edit field by clicking in the field or by pressing the **Tab** key until your cursor displays in the field. A blinking vertical bar displays in the box to show your cursor; when you see it, you can begin typing.



**Note:** In some edit fields, such as in the **Comparing** dialog box, you may not see the cursor until you begin typing.

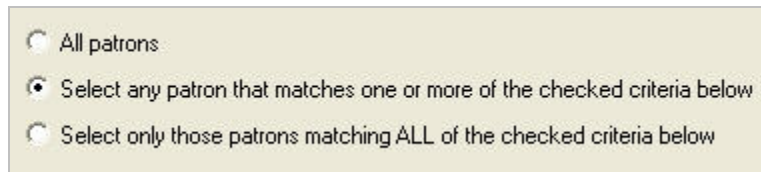
## Check boxes

Check boxes are small square boxes that consist of two states: **On** (selected) and **Off** (deselected). When the check box is **On**, a check mark displays in the box. Either click the box to change the state, or press the **Tab** key until a dotted line displays around the check box option (showing that it is selected), and then press the **Space Bar** to change the state. More than one check box can be selected in a group.



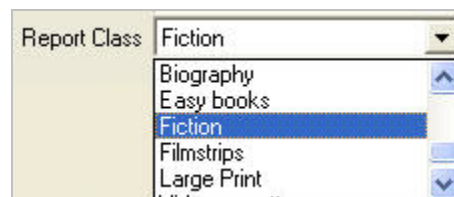
## Radio buttons

Radio buttons are a group of round buttons that are mutually exclusive. These are also in either the **On** (selected) or **Off** (deselected) state. Either click the option you need or press the **Tab** key to move to a set of option buttons and then press the up or down arrow key to change the selection. Only one in a group can be selected.



## Drop-down buttons/lists

When a drop-down button displays on the right side of a field, it means that there is a drop-down list of choices available. This feature is only used when specific entries are valid; for example, drop-down lists are used for the item and patron types you set up in your database. They are also used to store previously entered information (e.g., search terms), so that you can quickly choose a term instead of retyping it. Click the drop-down button, and click again to select the correct option from the list.



## Chapter 3: Administration

Using a variety of administrative tasks, you can configure and maintain Concourse to suit your library's needs. We recommend performing the tasks in this chapter to adequately set up your library's database.

For example, this chapter covers assigning permissions for each library worker, editing the due date calendar to include **No fine dates**, and more.

**Note:** The Concourse administrative functions can be accessed from the toolbar, the **Activities** menu on Concourse's menu bar, or the **ADMIN** button on the **Concourse Navigator**. The steps in this guide use the **Concourse Navigator**.

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### Managing Worker Records

After you (as the library administrator) have established your own log in name with full permissions, you can enter a log in name and password for each worker in your library.

All library workers who use the Concourse system must be assigned their own log in name and password. The worker records allow you to grant or restrict privileges and to track various worker activities, such as cataloging and circulating, in the **Review History** report.

In large libraries with multiple librarians and assistants, librarians might want to allow full permissions for more than one worker. At smaller libraries, librarians might reserve full permissions for themselves while allowing their volunteer or student assistants limited permissions only.

#### Worker Record Permissions

The permissions available in the **Edit Worker Records** dialog box include the following:

##### Supervisor Permissions

- **DoubleCheck** enables the worker to use the **DoubleCheck** feature for items and patrons.
- **Checkout Overrides** enables the worker to override warnings when patrons are checking out materials.
- **File Maintenance** enables the worker to perform maintenance functions, such as backup/restore, rebuild indexes and files, obfuscate history, verify, and configuration setup.
- **Renew Overrides** enables the worker to override warnings when patrons are renewing materials.
- **Reserve Overrides** enables the worker to override warnings when patrons are reserving materials.
- **Waive Fines** enables the worker to waive fines.
- **Review History** enables the worker to review item, patron, and worker history.
- **View Reports** enables the worker to view reports created in Concourse.

## 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 worker to delete patron and item records in bulk, edit Call Number prefixes, and edit patron and item reports.
- **Override Authority** allows the worker to enter a record in a manner that deviates from the normal authority settings.
- **Set Configuration** enables the worker to change configuration options via the **Configuration Setup** dialog box.

## Material Related Permissions

- **Add Items** enables the worker to add new items to the database.
- **Modify Items** enables the worker to modify item records in the database.
- **Delete Items** enables the worker to delete items from the database.
- **Perform Inventory** enables the worker to access the inventory options.
- **Export MARC 21** enables the worker to export MARC records to a file.
- **Print Supporting Materials** enables the worker to print barcodes, spine and pocket labels, and cataloging cards.

## Patron Related Permissions

- **Add Patrons** enables the worker to add patron records to the database.
- **Modify Patrons** enables the worker to modify patron records in the database.
- **Delete Patrons** enables the worker to delete patron records from the database.

## Circulation Related Permissions

- **Checkin Items** enables the worker to check items back into the database.
- **Checkout Items** enables the worker to check items out to patrons.
- **Renew Items** enables the worker to renew items for patrons.
- **Reserve Items** enables the worker to reserve items for patrons.
- **Enable Special Due Dates** enables the worker to enter special due dates when checking out items.
- **Review Patron Circulation Information** allows the worker 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** allows the worker to assess fines and process payments.
- **Modify Patron/Material Messages** allows the worker to edit messages that are attached to item or patron records.
- **Concourse Commuter** allows the worker to perform remote circulation functions and inventory with Concourse Commuter. For more information about Commuter, see the “Additional Licenses” section in **Chapter 1**.

- **Print Due Date Slips** enables the worker 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.

## Adding/Editing Worker Records

Use the following steps to create new worker records or modify existing ones.

1. Use a worker with full permissions to log in to Concourse.

**Important!** Concourse is delivered with the following full permission worker login: **Login Name** MLS, **Password** SETUP. Use this to log in to Concourse the first time and to configure your worker records. Create at least one additional full permission worker and then use it to disable the default MLS worker; otherwise, anyone who reads this manual can access Concourse and potentially corrupt your database.

2. Click the **ADMIN** button on the **Navigator Toolbar**.
3. Click **Worker Records** from the flow chart to open the **Edit Worker Records** dialog box. Only the **Login Name** and the **Initials** fields are active.
4. Enter a log in name, which can be up to 8 characters, and then press **Tab**. All fields and check boxes on the dialog box become active.

**Note:** If you are modifying an existing worker record, you can enter the worker's initials and then press **Tab** to load it. Asterisks display in the **Password** field and the worker's current permission settings are loaded.

5. If you are changing a worker's password or creating a new worker record, enter the new password, which can be up to 16 characters, and press **Tab**. Enter the password again in the **Confirm Password** field.
6. If you are creating a new worker record, enter the worker's initials in the **Initials** field.

**Note:** This field is not enabled for existing records. Once saved, the initials cannot be changed.

7. Click to select or deselect the permission check boxes as needed. Most permissions are enabled by default for new workers.

**Note:** For a complete definition of all these permissions, see the "Worker Record Permissions" section earlier in this chapter.

### Notes about Permissions

- Select *all* of the check boxes if you are creating a full permissions worker.
- If this is a supervisor or administrator, leave all or most of the **Supervisor Permissions** selected, including the **Setup Program** check box.
- If this is a non-supervising staff worker, remove all of the **Supervisor Permissions** and perhaps the **Material Related** and **Patron Related Permissions**.

- If this is a student or volunteer worker, include only the most basic permissions in the **Circulation Related Permissions** area, such as check in, check out, renew, and reserve.
- If the worker is leaving the library, select **Disable Login** in the bottom right corner of the dialog box. You cannot remove a worker record from Concourse.

**Note:** If workers are on vacation, maternity leave, summer break, or other similar leave, you can prevent them from accessing the system by disabling their log ins. Because the worker records are disabled and not deleted, they remain in the system, so if workers return to their position at the library, you can easily reactivate their record so they can access the system.

8. Click **Save**, and then click **Yes** in the confirmation dialog box. The current worker record is saved, and the **Edit Worker Records** dialog box is reset with only the **Login Name** and **Initials** fields enabled.
9. Repeat this process to add or modify additional worker records. If you do not need to make any additional changes, click **Close**.

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## Item Classes

Item classes categorize the items in your library. Grouping the items into classes enables you to store, locate, and report upon them easily.

Item classes can be added and modified through the **ADMIN** flow chart. They display in a drop-down list when you select the **Add/Edit Item Classes** button. Because you cannot delete an item class, consider carefully what classes you need before you begin defining them in the system. Once you have used a slot in the database by assigning it a name, you cannot remove it. To prevent needless repetition when an item class becomes obsolete, simply edit it and change its name to one that is not already listed.

Concourse allows you up to 64 entries in each item class category. The following item class categories are available:

- **Age Groups** identify the item's target age group/audience.
- **Locations** identify where the item is stored in the library. Location also refers to separate branches if applicable.
- **Material Types** identify the physical form of the materials in your collection, such as books, audiocassettes, videocassettes, equipment, and books on tape.
- **Circulation Types** cross-reference the patron class during circulation transactions to define the way the item should normally circulate. Consider the circulation policies that you practice and develop circulation types accordingly.
- **Report Classes** cross-reference the circulation types to compile item statistics reports; these are typically based on Dewey or LCCN information. Report classes are also used in the **Holdings Summary** report.
- **Study Programs** identify the study program (such as **Accelerated Reader** and **That's a Fact Jack**) associated with each item.

## Age Groups

Age Groups are similar to reading levels. Concourse comes pre-configured with **Adult** and **Juvenile** as basic age groups. You can change these and/or add additional age groups to suit your needs. Think about the various reading levels of your patrons and set up age groups that will be useful in your library.

Other examples of appropriate age groups include the following:

- Children
- Faculty
- Grade Levels (for example, K-3, 4-6, etc.)
- Students
- Youth

## Locations

Location refers to the item's physical location or branch. Concourse comes pre-configured with **Main Library** and **At the Circulation Desk** as the default locations.

Other location examples include the following:

- Bookmobile
- Equipment Room
- Librarian's Office
- Magazine Rack
- New Release Shelf
- Paperback Rack
- Teacher Resource Center
- Work Room

## Material Types

Material types refer to the physical form of the materials in your collection. Most of your materials may be books, but you may have various other types of print, electronic, audio, or visual materials in your library.

Concourse comes pre-configured with **Book**, **Filmstrip**, **Videocassette**, **Audiocassette**, and **Large Print** as material types. You can modify these and then add new material types as needed.

**Warning!** Material types are often confused with report classes because they can occasionally overlap. This is a good reason to base your report classes on your Call Number system. For more information, see the "Report Classes" section below.

Other examples of material types include the following:

- Books on Tape

- Computer Software (CDs, Disks)
- Equipment (such as TVs, VCRs, Overhead Projectors, and Laptops)
- Library Furnishings
- Maps and Globes
- Microfiche
- Periodicals/Magazines
- Professional Collection
- Records
- Vertical Files

## Circulation Types

When you are cataloging, you assign a circulation type to each item based on that item's normal circulation. Concourse comes pre-configured with **Circulation**, **Reference**, and **AV Circ** as circulation types. You can also set up lending and fine rules for each patron class that has access to the circulation type. For instance, there is no need to set up a type called **General Circulation – Adults** and **General Circulation – Juvenile**. Simply set up one type called General Circulation and configure the lending and fine rules differently for your adult patron class and your juvenile patron class.

Other examples of appropriate circulation types include the following:

- Equipment Circulation
- Limited Circulation
- Overnight Circulation
- Teacher Circulation

## Report Classes

Report classes cross-reference circulation for accurate statistical information. Although they often overlap material types, report classes allow you to classify materials in a more detailed manner so that you can segregate certain information for your reports. Overlaps usually occur when you are not basing your report classes on Dewey or LCCN classifications.

Concourse comes pre-configured with **Dewey Ranges (000-900)**, **Biography**, **Fiction**, **Easy books**, **Videocassettes**, **Audiocassettes**, **Filmstrips**, and **Large Print** as report classes.

Other examples of report classes include the following:

- Accelerated Reader (so you can report on it)
- Award Books (Newbery/Caldecott/State)
- Children's Easy
- Juvenile Easy
- Professional Collection
- State Collection

## Study Programs

Study programs provide a point system that encourages children to read. Companies like **Accelerated Reader** sell tests for certain books that may be on a student's reading list. Once a student completes a book in one of these programs, he or she takes a test to earn points. These points can then be used to obtain prizes or extra privileges.

Unlike other item classes, the **Study Programs** item class has no default. When you add a study program, it simply displays in the appropriate drop-down list in the **Programs** tab of the **Add/Modify Items** dialog box. From there, you can associate one or more study programs with an item record, including the points awarded for passing the test for each program. Concourse comes pre-configured with the study programs **Accelerated Reader** and **Reading Counts**.

## Configuring Item Classes

You can modify existing item classes and create additional item classes at any time. Once created, you *cannot* delete an item class, but you can edit it. Changes to item classes are global and affect any items currently assigned to the class.

For example, if you change the age group **Pre-Reader** to **Young Adult**, all of the items that were previously classified as **Pre-Reader** are now incorrectly classified as **Young Adult**. You would then need to generate a report on all **Young Adult** items and manually verify that all of the pre-reader materials are re-assigned to an appropriate age group.

**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.

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 the appropriate option to open the **Add/Edit** dialog box for one of the following item class categories:
  - **Age Groups** – the **Add/Edit Age Group** dialog box opens.
  - **Locations** – the **Add/Edit Location** dialog box opens.
  - **Material Types** – the **Add/Edit Material Type** dialog box opens.
  - **Circulation Types** – the **Add/Edit Circulation Type** dialog box opens.
  - **Report Classes** – the **Add/Edit Report Class** dialog box opens.
  - **Study Programs** – the **Add/Edit Study Programs** dialog box opens (note the absence of the **Default** field on this 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 a new item class, click the **Add New Entry** button. A new row displays in the grid with the words **<Enter New Name>** and **<Enter New Description>** in the corresponding columns. You can now edit this row in the same manner that you would edit an existing item class.
6. Repeat steps 4 and 5 to modify or add item classes as needed.
7. When you are finished, click **Save Changes**. A confirmation dialog box opens.
8. Click **Yes** to keep your work. The **Add/Edit** dialog box closes.

---

## Edit ItemID Types

When you access the **Add/Modify Items** dialog box, the next available item ID number automatically displays in the **Item-ID** field. You can change the next available number and create additional alphanumeric sequences using the **Add/Modify ItemID Types** dialog box.

By default, an all-numeric sequence is defined. You are allowed only one all-numeric sequence. The remaining 31 sequences must use a unique set of alphabetic characters as a prefix.

Some examples of valid sequences are as follows:

- **A1, ABC1, B150** – Since all item ID numbers in Concourse are 8 digits long, these sequences are automatically converted as follows: **A0000001, ABC00001, B0000150**.

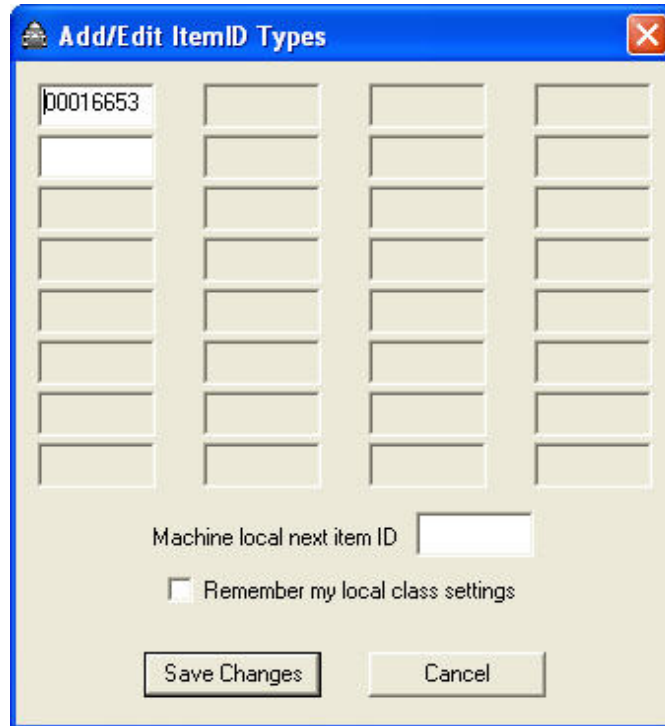
Some examples of invalid sequences are as follows:

- **A1A1** or **1P15** – The prefixes on these sequences are read as **A1A** and **1P**, respectively. This is invalid because all prefixes must be alphabetic; no numerals can be used in the prefix.
- **2000** – There can be only one all-numeric sequence. You can, however, set the default numeric sequence to a different number.
- **A** – You must have a number following the alphabetic prefix.

**Note:** When you enter an invalid sequence and click **Save Changes**, Concourse edits the sequence to make it valid. If you do not want to use the sequence, click **Cancel** and reopen the dialog box.

### To Create a New ItemID Sequence

1. Click the **ADMIN** button on the **Navigator Toolbar**.
2. Click the **Admin** button on the flow chart to open a shortcut menu.
3. Click **Add/Edit ItemID Types...** to open the **Add/Edit ItemID Types** dialog box.



4. In the next available field, enter the first value in your new item ID sequence (e.g., **AV1** for audio-visual materials or **LP1** for large print books).
5. Press **Tab**. The next field is now available.
6. Repeat this process to add another item ID sequence.

**Warning!** Verify that you entered all item ID types correctly. You cannot remove them later and you cannot modify the alpha prefix after changes are saved. If needed, you can click **Cancel** now to abort all changes.

**Important!** If you are running Concourse over a network, please note that entering a number in one of the top fields causes changes to be made throughout the system. In other words, every instance of Concourse is affected by the change. If you wish to make a change only for the local machine on which you are currently working, enter the new number in the **Machine local next item ID** field. To avoid a centralized number (one that is placed in a top field) overriding local item ID numbers, every user on the network should use the **Machine local next item ID** field.

7. When you have verified that all of your sequences are correct, click **Save Changes**. The sequences are saved, and the dialog box closes.

**Note:** If you did not press **Tab** after entering the last item ID type, you need to click **Save Changes** twice.

---

## Patron Classes

After you configure your circulation types (for items), you can configure patron classes, which allow you to define circulation restrictions and privileges for each of those circulation types. After you establish these rules, the check out process becomes completely automated. Concourse can then track both the materials you maintain and the types of patrons who use those materials. Since circulation types and patron classes are cross-referenced, you can process transactions quickly using pre-designated circulation definitions. Once you have established the basic parameters, you can authorize exceptions to the rules as needed.

Different libraries have different classes of patrons. For example, a public library might have patron classes that include the following:

- Child
- Juvenile
- Adult

A school library often follows homeroom assignments so that it may easily distribute overdue notices. Patron classes that are divided according to homeroom might include the following:

- Susan Smith and John Johnson
- 2nd grade A and 2nd grade B
- Room 905 Wilson

A church library's patron classes might include the following:

- Member
- Non-Member
- Staff

Concourse comes pre-configured with **Adult**, **Children**, **Pre-school**, and **Youth** as patron classes.

### Editing Patron Classes

Since you *cannot* delete patron classes once they have been added, it is best to modify the existing patron classes before adding new classes.

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 **Old Patron Class name:** drop-down list, and click again to select the patron class you need to modify. The description and circulation privileges for the selected patron class display in the dialog box.
4. To change the name of the selected patron class, enter the new name in the **New Patron Class name:** field.

5. To change the description of a patron class, enter it in the **Description:** field.
6. To change circulation privileges, highlight each of the fields you wish to change in the **Disallow Circ Privileges** box (discussed below) and enter your changes. You can also press **Tab** to move through the fields in this section to make changes to each field.
7. Press **Tab** until you reach the first cell in the grid at the bottom and change the circulation type limits as needed.
8. When you have made all necessary changes to the patron class, click **OK** to save your work and to close the dialog box; otherwise, click **Cancel** to discard your changes.

## Creating Patron Classes

If you find that you do need additional patron classes, use the following steps to create new ones.

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 **Create New...** button. The **New Patron Class** dialog box opens.
4. Enter the name for your new patron class in the **Patron Class Name:** field.

5. Enter a description in the **Patron Class Description:** field.
6. If you need to import the circulation privileges of an existing patron class, the **Copy Initial Settings from:** drop-down button, and click again to select a class from the list. The **Disallow Circ privileges** and **Circulation Type limits** settings for the selected patron class (discussed below) will be copied to the new patron class.
7. Click **Create**. The **New Patron Class** dialog box closes, and the **Edit Patron Class** dialog box displays.
8. If you copied settings from another class, those rules display on the **Edit Patron Class** dialog box; otherwise, all privileges will be set at **0**. Make changes as needed.
9. Click **OK** to save your changes; otherwise, click **Cancel**.

## Disallow Circulation Privileges

When you create a patron class, you need to configure limits for how much patrons can owe in fines, how many overdue items they can have, and how many items they can check out before their circulation privileges are blocked. Once patrons reach the limit, a warning displays when they try to check out or renew any library materials; workers with permission can override limits if needed. All fields affect the patron class you specified.

When you are checking items out, Concourse warns you if a patron has met the patron class limits for unpaid fines, overdue items, or items checked out. Workers with the **Checkout Override** permission enabled have the ability to override this warning. Workers without this privilege may still click **Yes** to override, but they are then required to have a worker with the **Checkout Override** privilege enter his or her log in name and password to approve the override.



Disallow Circ privileges:  
when patron has more than:  in fines, or has  overdues  
Or patron has  items checked out

Make changes to the fields in the **Disallow Circ privileges:** section by highlighting the contents of a field and entering your changes. Setting a field to **0** disables the restriction.

### When patron has more than {amount} in fines

This field suspends check out privileges if the patron has accrued more than the specified dollar amount in fines. You can use **\$0.00** if you do not charge fines or a small amount, such as **\$0.10** or a higher amount, such as **\$2.00**, if you do not need patrons to be restricted until they reach that limit.

### or has {quantity} overdues

This field allows you to limit excessive overdue items. Specify how many overdue items a patron in this class must have to suspend the patron's circulation privileges. If you do not want to limit your patrons, enter **0** in this field.

### Or patron has {quantity} items checked out

This field limits the maximum number of items a patron can check out simultaneously. If you do not want to limit the number of items that the patron can check out, enter **0** in this field. If you want to limit the total number of items that patrons in this class can have out at one time, specify the total number of check outs allowed.

**Note:** This limit supersedes the values in the **Limit** column below.

## Circulation Type Limits

In the grid at the bottom of the dialog box, there is a row for each of the defined circulation type item classes. The columns allow you to define circulation and fine parameters for each circulation type. These limits apply only to those patrons in the selected patron class.

Circulation Type	Limit	Loan Period	Grace Period	Fine Amount	Fine Every	Max Fine	Renew Limit
Circulation	5	14	1	0.00	0	0.00	0
Reference	0	0	0	0.00	0	0.00	0
AV Circ	0	0	0	0.00	0	0.00	0

- **Limit** – the number of items of this type that members of this class can check out. For example, you can set a maximum check out limit of 3 videos per patron.
- **Loan Period** – the number of days that members of this class are allowed to keep items of this type without renewing (e.g., 5 days for videos and 10 days for books).
- **Grace Period** – the number of days granted beyond the loan period for materials of this type to be returned without assessing fines. Although no fine is charged if items are returned within this grace period, fines still accrue for these days if the item is returned after the grace period expires. This can be used to accommodate delays in your processing schedule. For instance, if you sometimes check in items the day after a patron returns the items, you can set the grace period to be 1 day so that Concourse does not fine that patron. However, if a patron returns an item 1 day late and you do not process (check in) the item until the following day, the patron will be assessed a fine for 2 days. You will have to waive the fine manually.
- **Fine Amount** – the dollar amount you want the system to assess in fines when an item of this type is past due. This fine is applied based on the information specified in the **Fine Every** and **Max Fine** columns defined below.
- **Fine Every** – how often, in days, that the **Fine Amount** accrues (e.g., **1** = every day and **7** = weekly).
- **Max Fine** – the maximum amount of fines that can be assessed on each overdue item of this type. Use this limit to keep the fines from growing to large values.
- **Renew Limit** – the number of times items of this type can be renewed before a circulation override is required. This feature helps keep the most popular library resources available for other patrons. For example, if you have a circulation type for new releases, you may want to make them non-renewable by entering **0** in this field.

## Reset Next PatronID

The next available patron ID number displays in the **Add/Modify Patrons** dialog box by default. You can change this number if you need to review a patron record that already exists or if you want to add a patron record that is out of sequence.

If you make a change to this number on the **Add/Modify Patrons** dialog box, it will affect your patron ID numbering sequence as follows:

- If you use a *larger* patron ID number than the default, you reset the numbering sequence unless you change it back to a smaller number using the **Reset the next PatronID Number** dialog box (see next set of steps). For example, if the next available patron ID number is **0000635** and you change it to **0090000** to create a new patron record with that number, after you save the new record, the next available patron ID number is reset to **0090001**. The numbers **0000635** to **0089999** are skipped.
- If you use a *smaller* patron ID number than the default, you will be allowed to add a new patron record under this number or modify a patron record that already exists there. However, when you save the record, you will return to the same patron ID that was displayed by default. For example, if the current patron ID is **0000635** and you enter **0000600**, you will be able to modify the patron record under the patron ID **600**, or if it is not already used, you can add a new patron record there. When you save the record, you will return to the **0000635**.

If you skipped a range of patron IDs and need to permanently reset your patron ID numbering sequence to a smaller value to use those IDs, you must use the **Reset the next PatronID Number** dialog box.

1. Click the **ADMIN** button on the **Navigator Toolbar**.
2. Click the **Admin** button on the flow chart to open a shortcut menu.
3. Click **Reset Next PatronID...** to open the **Reset the next PatronID Number** dialog box. The next sequential patron ID number displays in the field. This is the number included in the **PatronID** field of the **Add/Modify Patrons** dialog box when you open it.
4. Enter the number that you want to use as the next available **PatronID**.
5. Click the **Change It!** button to save the new number. The next time you open the **Add/Modify Patrons** dialog box, the number you entered in the **Reset the Next PatronID Number** dialog box displays in the **PatronID** field.

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## Special Barcodes

Scanning barcodes saves time and makes checking in/out processes, adding item/patron messages, and other tasks easier. Scanning special barcodes allows you to complete transactions or move from one task to another in Concourse, rather than using your keyboard or mouse. If needed, you can also set up special barcodes to use instead of the Special Barcodes sheet.

Do the following to access the **Special Barcodes** sheet:

1. Click **Start | Programs (or All Programs) | Book Systems, Inc | Documentation | Concourse Special Barcodes**.

**Note:** This is the default location; if your Concourse was installed in a different location, click **Help | About Concourse** from Concourse's menu bar to find the appropriate directory.

2. Print the **Special Barcodes** sheet.

If you cannot use the **Special Barcodes** sheet provided and need to set up special barcodes, use the steps below to set up special barcodes.

1. Click the **ADMIN** button on the **Navigator Toolbar**.
2. Click the **Admin** button on the flow chart to open a shortcut menu.
3. Click **Setup Special Barcodes** to open the **Setup Special Barcodes** dialog box.
4. Click the **Function to perform** drop-down button, and click again to select one of the tasks listed.
5. Scan or manually enter special barcode information in the **Barcode Text** field.  
**Note:** The barcode information should correspond to the action you selected in step 4.
6. Click **Commit** to save your special barcode information.
7. Click **Close** to exit the dialog box.

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## Review History

Use the **Review History** dialog box to review patron/worker activity, patron/item history, or Bookmobile actions. For more information about Bookmobile features, see the “Setting up a Bookmobile” section in **Chapter 13**.

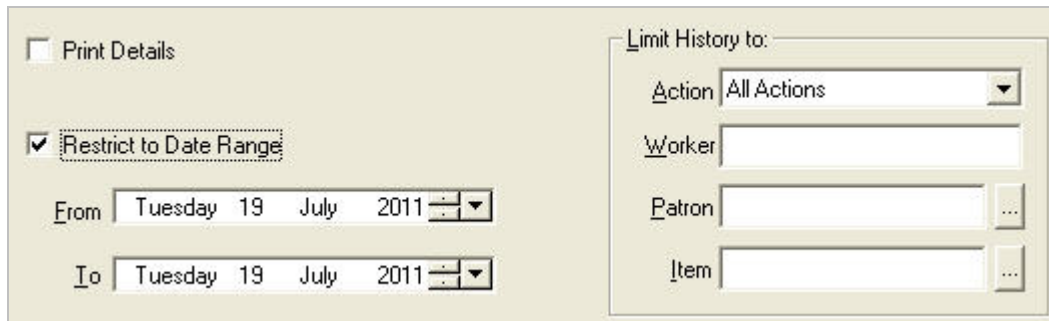
**Note:** If needed, you can purge the patron information stored by the **Review History** feature. Please refer to the “History Obfuscator” section later in this chapter for more information.

1. Click the **ADMIN** button on the **Navigator Toolbar**.
2. Click the **Review History** button to open the **Review History** dialog box, displaying all database history for the current date.

**Note:** If your report includes a long list of actions, you can resize the **Review History** dialog box to see more information at once by clicking a corner or edge of the dialog box and then dragging the window.


3. If you want to include patron names and/or item titles when you print the history, click the **Print Details** check box.

4. If needed, filter your search results by a different date or range of dates and other criteria.



**Note:** Most of the criteria can be combined, but the **Patron** and **Item** fields cannot be used simultaneously.

- You can specify limits on the displayed history with the posting dates. By default, the **Restrict to Date Range** check box is selected and the current date is specified in both fields. If you need to change or disable the date delimiter, do one of the following:
  - Change the **From** and **To** dates to alter the date range to find only the history actions on those dates. See the “Entering Dates” section in **Chapter 2** for more information.
  - Click to deselect the **Restrict to Date Range** check box to include all transactions in your database history, regardless of the date they were posted.
- You can limit the history by type of transaction. Click the **Action** drop-down button to open the list of possible transactions, and click again to make a selection. Concourse sorts the **Review History** report by that transaction.
- You can limit the history to transactions posted by a specific worker in one of the following ways:
  - Enter the worker’s log in name in the **Worker** field.
  - Enter the worker’s initials in the **Worker** field.
- You can limit the history to transactions posted to a specific patron account in one of the following ways:
  - Scan or enter the patron barcode number in the **Patron** field.
  - If the patron ID is different than the barcode number, enter the patron ID in the **Patron** field, preceded by **ID:** (e.g., enter **ID:150** for the patron ID **0000150**).
  - Click the **...** button to open the **Patron Lookup** dialog box where you can search for the patron record.
- You can limit the history to transactions associated with a specific item in one of the following ways:
  - Scan or enter the item barcode number in the **Item** field.
  - If the item ID is different than the barcode number, enter the item ID in the **Item** field, preceded by **ID:** (e.g., enter **ID:175** for the item ID **0000175**).

- Click the ... button to open the **Catalog Lookup** dialog box where you can search for the item record.
5. Wait a few seconds for the history list to refresh or select the **Refresh** button  on the toolbar after you make any changes to the date range or **Limit History** section. The appropriate history is displayed in the grid.
  6. If you want to include the item's title, right-click any column in the report to open the **Choose fields for display** dialog box
    - In the **All Fields** list, click **Title** and then the >>> button to move your choice to the **Current** list.
    - To change the position of an item in the **Current** column, click to select the item and drag it to the needed position.
    - Click **Ok**; otherwise, click **Cancel** to discard your column changes.

**Note:** If needed, you can click **Restore Defaults** on the **Choose fields for display** dialog box at any time to return to the original columns included on the report.

## Review History Shortcut Menu

When you right-click a grid entry in the **Review History** dialog box, a shortcut menu opens. The commands listed on this menu depend upon whether the entry is a patron or an item record, but generally they include most of the following:

- **Show Detail** – displays the currently selected transaction in the **History Detail** dialog box. You can use the **Next** and **Previous** buttons on this dialog box to scroll through all of the transactions in your history. Click the **Close** button when you are finished.
- **Show history for Patron ID** – shows all the history actions for the selected patron record. This removes any date restrictions or worker limits that you have specified using the **Review History** dialog box, expanding the history to all actions for this patron done on any day by any worker.
- **Show history for Item ID** – shows all the history actions for the selected item record. This removes any date restrictions or worker limits that you have specified using the **Review History** dialog box, expanding the history to all actions for this item done on any day by any worker.
- **Show History for Date Selected Date** – shows all transactions posted to the database on the selected date. This eliminates any worker, patron, or item restrictions that you have placed on the currently displayed history.
- **Search results for Patron ID** – limits the currently displayed history to only those transactions for the selected patron.
- **Search results for Item ID** – limits the currently displayed history to only those transactions for the selected item.
- **Restrict Results to Date Selected Date** – limits the currently displayed history to only those transactions for the selected date.
- **Refresh Display** – refreshes the history list to reflect any changes made to the database or to the history delimiting criteria.

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## 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.

**Important!** In order to access this feature, the current worker must have the **Setup Program** permission.

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 radio buttons:
  - **Keep only last Patron for each item** – Only data related to the last patron who checked the item in or out will be kept.
  - **Remove from history records older than {number} {days/hours}** – 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 older than 14 days.
  - **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**; otherwise, click **Cancel** to close the dialog box without clearing history.

**Important!** The **Cancel** button toggles to **Stop**; if you click **Stop** to halt the procedure, Concourse leaves the process only partially completed. Either repeat the process to completion, or close the dialog box and rebuild the history indexes. (This prevents possible errors you may encounter concerning patron or item history). Please refer to the "Rebuilding an Index" section later in this chapter for information.

7. When the process is complete, a success message displays; click **Close** to exit the **History Obfuscator** dialog box.

**Note:** Since the history indexes are rebuilt automatically at the end of this process, you do not have to perform a manual rebuild.

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## Due Date Calendar

By default, your **Concourse Due Date Calendar** is configured so that every day is a valid due date; there are no pre-configured holidays. To prevent an item from becoming due on a day when the library is closed, you need to establish closed days and specify alternate due dates. To prevent patrons from being charged fines for not returning items on days the library is closed, you can also set no-fines days.

You may edit the **Concourse Due Date Calendar** monthly, quarterly, or yearly. We recommend that you edit your calendar as much as possible at one sitting. For example, you can specify alternate due dates for days that you know the library will be closed during the year, such as Christmas, Thanksgiving, and Memorial Day; then you can modify other dates the library is closed as you become aware of them, e.g. if your library is unable to open due to repairs/renovation or bad weather.

## Opening the Due Date Calendar

1. Click the **CIRCULATION** button on the **Navigator Toolbar**.
2. Click the **Due Date Calendar** button on the flow chart.

## 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 symbols: <<, <, >>, >. Use these buttons to locate a date by scrolling backwards and forwards by year (<< / >>) and month (< / >).

## Configuring a Single Closing Day

1. Find the date by scrolling to the correct month and year. For each calendar day, the *calendar* due date (the true date in **blue**) is in the upper right corner of the box and the *alternate* due date (in **gray**) is across the bottom of the box. By default, these dates match.
2. Click the alternate due date and either enter or select a different date. You can use the scroll buttons or the drop-down calendar to select the date; see the “Entering Dates” section in **Chapter 2** for more information.



**Example:** If you are closed November 11, scroll to the month of November. Click the alternate due date corresponding to the calendar due date of the 11th, and change the due date to the next day that the library is open for business.

3. When the screen is refreshed (leave that month and then return to it), any alternate due dates that you have set display in **red**.
4. When you are finished making changes to the **Concourse Due Date Calendar**, click **Save** at the bottom to keep your changes and close the calendar.



## Configuring Regular Closing Days

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. Click one of the following check boxes to configure your calendar:
  - **Configure range of dates** – 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 **Close** or **Open** radio button and then specify the range of dates affected. If you select **Open**, you can also click the **Leave open, but Redirect to** check box and enter an Alternative Due Date for the range of dates specified above.

- **Configure day (changes apply to active year)** – If your library will be open or closed on a specific day of the week, click the **Close** or **Open** radio button. Then click the drop-down button, and click again to select a day.
  - **Charge fines on affected dates** – If you want to charge fines on the dates you have specified, click the check box to mark this option. Concourse will assess fines as normal on those dates.
3. When you are finished, click the **Commit Changes** button to add these settings to the **Concourse Due Date Calendar**.

### Configuring No-Fine Days

You can set no-fine days to make sure Concourse does not calculate that portion of the fine. You may want to use this feature after an unexpected closing, such as one due to inclement weather.

1. Find the date on the calendar that you want to set as a no-fine day by scrolling to the correct month.
2. Click the green dollar sign  corresponding to the date you want to set as a no-fine date.
3. A red null sign  now covers the dollar sign for that date to show that it is a no-fine date.  
**Note:** Click the dollar sign again to remove the null sign and allow fines for that day.
4. When you are finished making changes to the **Concourse Due Date Calendar**, click **Save** to keep your changes and close; otherwise, click **Cancel** to close the dialog box without saving.


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## Bulk Functions

For your convenience, Concourse allows you to delete both patrons and items in bulk.

### Bulk Deleting Patrons

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 list of patrons you want to delete. For example, you may click the **Filter More:** check box to open the **Build Filter** dialog box. In this dialog box, you could specify the filter **Patron Class equals Graduated**, so that all of the patron records assigned to that class will be deleted.
5. Click **OK** in the **Build Filter** and **Select Patron** dialog boxes.


6. Once the report is built, review the results. Make sure that you want to delete every patron record in the list. If you see a patron record you do not want to delete, do the following:
  - 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. Once you have finalized your list, click the **Bulk Delete**  button on the report toolbar. Concourse warns you that you are about to delete records and asks if you want to proceed.
8. Click **Yes** if you would like to continue; otherwise, click **No**.
9. The **Enter Password** dialog box opens. Enter a username and password with the *Bulk Delete* worker permission enabled in the corresponding fields and click **OK**.
10. A **Please Wait ... Processing** dialog box displays while the delete process is being completed.
 

**Note:** Patrons that have outstanding fines or items out cannot be deleted. If you have attempted to delete a patron 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.
11. When the records have been deleted, the dialog box displays how many records were removed; click **OK** to close this message box. If needed, contact any patron(s) with outstanding issues.

## Bulk Deleting Items

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 criteria for the list of items that you want to delete. 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**.
6. Click **OK** to begin building the report.
7. Once the report is built, review the results. Make sure that you want to delete every item record on the list. If you see an item record you do not want to delete, do the following:
  - 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.

8. Once you have finalized your list, click the **Bulk Delete**  button from the report's toolbar. Concourse warns you that you are about to delete records and asks if you want to proceed.
9. Click **Yes** if you would like to continue; otherwise, click **No**.
10. The **Enter Password** dialog box opens. Enter a username and password with the *Bulk Delete* worker permission enabled in the corresponding fields and click **OK**.
11. A dialog box opens, which reports the progress of the deletion process.  
**Note:** Items that are master records, are checked out, are 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 items that were not deleted and the restrictions that applied.
12. The **Please Wait ... Processing** dialog box displays while the delete process is being completed.  
**Note:** Items that have outstanding fines attached or that are currently out 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 items that were not deleted and the restrictions that applied.
13. When the records have been deleted, the dialog box displays how many records were removed; click **OK** to close this message box. If needed, contact any patron(s) who have the items or owe fines on them.

## Chapter 4: Patrons

Concourse allows you to maintain full records of the people who use your library. You can record not only a patron's contact information, but also his or her preferences, photograph, and supplementary data. You can also compose form letters to send to patrons and export patron files.

**Important!** If you are a new Concourse user, you 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 set up advanced configurations more quickly than the file. See the "Configuration Settings" section in **Chapter 11** for detailed information.

---

### Add/Modify Patrons

Patron records are created and edited from the **Add/Modify Patrons** dialog box. Notice that when you initially access this dialog box, the name displayed in the title bar is **Creating New Patron PatronID**, but if you use this dialog box to edit or review a patron, its title changes to **Editing Patron Name**. For clarity, this document refers to both versions of the dialog box as **Add/Modify Patrons**.

**Note:** You must have a Concourse Level 3 license or higher to add patrons using this dialog box.


To open this dialog box, click the **PATRON** button on the **Navigator Toolbar**, and then click the **Add/Modify Patrons** button on the flow chart. When the dialog opens, the next available ID number automatically displays in the title bar and the **PatronID** field.

Only the **Name** and **PatronID** fields are required. You can add as much or as little information as you feel necessary. As you add these patrons to the database, note the newly assigned patron ID numbers on their forms. You can then immediately check out items to them using their ID numbers and come back later to add additional information to their records.








### Patron Toolbar

You will use the **Add/Modify Patrons** dialog box to maintain your patron records. The available buttons, from left to right, are described in **Table 1: Patron Toolbar**:

**Table 1: Patron Toolbar**

	<b>Lookup</b> allows you to open the <b>Patron Lookup</b> dialog box to locate a patron record. This function is also available in the menu bar as <b>Edit   Lookup Record</b> .
---	--

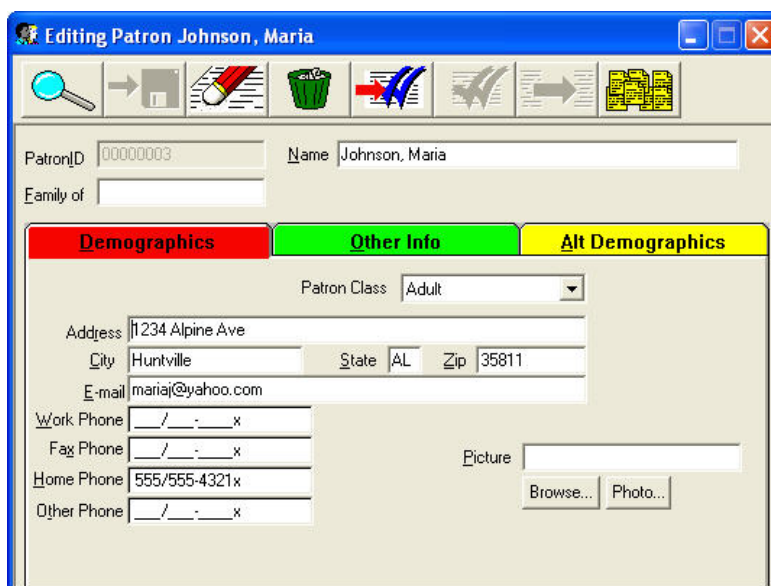
**Table 1: Patron Toolbar**

	<p><b>Save Changes</b> stores the current patron record. This function is also available in the menu bar as <b>Edit   Save Changes</b>.</p>
	<p><b>Clear Fields</b> clears all of the fields of the <b>Add/Modify Patrons</b> dialog box. This function is also available in the menu bar as <b>Edit   Clear Fields</b>.</p>
	<p><b>Delete</b> removes the patron record from your database. This function is also available in the menu bar as <b>Edit   Delete Record</b>.</p> <p><b>Warning!</b> Once a record is deleted, its ID number can never be used again.</p> <p><b>Note:</b> You can bulk delete patron records if needed; see the “Bulk Deleting Patrons” section earlier in this chapter for more information.</p>
	<p><b>DoubleCheck on/off</b> enables the <b>DoubleCheck</b> feature, which allows you to review patron records in your database and confirm that they are correct or make changes as needed. To disable <b>DoubleCheck</b>, click this button again. See the “DoubleChecking Records” section later in this chapter for more information.</p>
	<p><b>DoubleCheck Record</b> allows you to approve that the current patron record meets library standards.</p>
	<p><b>Skip Next Record</b> skips the next record in the <b>DoubleCheck</b> queue without double-checking it.</p>
	<p><b>Messages</b> opens a dialog box that allows you to read and write messages associated with the patron record. For more information, please refer to the “Messages” section in <b>Chapter 6</b>.</p>

## Patron Tabs

The **Add/Modify Patrons** dialog box includes three tabs: **Demographics**, **Other Info**, and **Alt Demographics**:

- **Demographics** displays in red; this tab allows you to enter a patron’s available and relevant contact information as well as his/her patron class and picture file. You can use it to record addresses, telephone numbers, etc.



- **Other Info** displays in green; this tab maintains additional patron data. These fields are optional. The first three fields are user-defined, meaning you can enter data of your choice, such as parents' work telephone numbers, Internet permissions, driver's license numbers, homerooms, or other identifiers. Be consistent with the type of data you enter to ensure accurate report generation. For example, you could enter a homeroom teacher's name or initials in the first **User Defined** field so you could generate a **List of Patrons** report filtered by **User Def 1 equals SMITH**.
- **Alt Demographics** displays in yellow; this tab maintains data about the patron's secondary residence or place of employment. Students who are in families with shared custody and teachers who reside elsewhere during the summer months are two examples of patrons who might need to provide alternate addresses.

## Spell Check

Spell checking is available in portions of the **Patron** module, such as the **Add/Modify Patrons** dialog box. When you type a misspelled word in a portion of the program that supports the spell checking feature, a red jagged line displays beneath the word(s). This line also displays beneath words that are not in the program dictionaries.



**Note:** The spell check feature is also available in portions of the **Catalog** module and the optional **Authority** module.

The following steps describe how to use spell checking:

1. Right-click on the underlined word(s). A right-click menu opens, displaying the following options:
  - **Suggested Spellings**
  - **Add**
  - **Ignore**
  - **Spell Check Options...**
  - **Undo**
  - **Select All**
2. To replace a misspelled word with a suggested spelling, click one of those options.
3. To add an unrecognized word to the dictionary, click **Add**.
4. To remove the jagged, red line from an unrecognized word without adding it to the dictionary, click **Ignore**.
5. To open the **Spell Checking Options** dialog box, click **Spell Check Options....**:
  - On the **General** tab, click to deselect any of the following options: **Check spelling as you type**, **Ignore words in UPPERCASE**, **Ignore words with numbers**, and **Ignore internet and file addresses**.
  - On the **User dictionary** tab, you can add or remove words from your dictionary.

- On the **Common misspellings** tab, you can view common incorrect spellings and the corresponding correct spelling. You can also enter a new incorrect spelling and the correct word in the appropriate fields and click **OK** to add it to the list.
6. Click **Undo** to delete the misspelled word or to undo the latest change if you typed any other words/characters *after* typing the misspelled word.
  7. To select all words in the field, click **Select All**.
- Note:** You can also access spell check from **Edit | Check Spelling**, which opens a standard **Spelling** dialog box from which you can make corrections.

## Changing Text Case

You can also choose various text case settings in sections of the **Patron** module, such as the **Add/Modify Patrons** dialog box.

**Note:** The change case feature is also available in the **Catalog** module and the optional **Authority** module.

To change text case, follow the steps below:

1. Highlight to select the text you wish to format.
  2. Click **Edit | Change Case**.
- Note:** If the **Change Case** option does not display on the **Edit** menu, or if the submenu options listed below are grayed out, the selected text cannot be changed.
3. Click to choose a case option from the submenu that displays the following:
    - **Upper Case** capitalizes all letters of selected text.
    - **Lower Case** changes all letters of selected text to lowercase.
    - **Title Case** capitalizes the first letter of each word selected.
    - **Sentence Case** capitalizes the first letter of the first word selected.
  4. The selected text changes to the case you specified.

## Adding Patron Records

To add patron records to your catalog, access the **Add/Modify Patrons** dialog box and complete the information on the three tabs, as required by your library standards.

1. Click the **PATRON** button on the **Navigator Toolbar**.
2. Click the **Add/Modify Patrons** button on the flow chart to open the **Add/Modify Patron** dialog box; **Creating New Patron PatronID** displays in the title bar. The next available patron ID also displays in the corresponding field in the dialog box. If you would like to use a different patron ID number, you can either manually enter that number or change the number sequence of the entire patron database. See the “Reset Next PatronID” section in **Chapter 3**.
3. In the **Name** field, enter the patron’s name in **last name, first name** format, e.g., **Smith, Lucas**.

4. If the patron has a family member who is already in the system, enter that family member's patron ID in the **Family of** field. Press the **Tab** key, and the family member's address is imported into the new patron record. For more information, see the "Family Of Feature" section below.
5. Enter the appropriate information on the tabs provided.
6. Once you have entered all of the necessary information, click the **Save Changes** button.

## Family Of Feature

The **Family of** field operates like the **Copyof** field in the item records. The master record, usually the record for the head of the household, governs the data for each of the records that reference it. You must modify the common information from the *original* family member's record.

For example, if you are currently entering a record for one of Maria Johnson's children, you would enter her patron ID number in the **Family of** field to import her address and phone numbers as applicable. If Mrs. Johnson moves and you update her record to reflect her new address, her child's record would automatically be updated.

The screenshot shows a form with three input fields. The first field is labeled 'PatronID' and contains the value '00000004'. The second field is labeled 'Name' and contains the value 'Johnson, Abby'. The third field is labeled 'Family of' and contains the value '00000003'.

1. When creating a record for a new family member, enter the new patron's name in **LastName, FirstName** format (for example, **Johnson, Abby**).
2. In the **Family of** field, enter the ID number of the family member who is already a patron; this will be the master record from which the address information can be changed.
3. Press **Tab** to import the family member's address (**Address, City, State,** and **Zip**). The address automatically displays in the current patron's record, but the fields will display disabled so you cannot manually change it.
4. Add any other required information to the remaining fields on this tab, such as **E-mail, Work Phone,** etc.
5. Click the **Save Changes** button.

## Adding Patron Photographs

Concourse allows you to attach photographs to your patron records in two ways: by uploading existing image files or by taking pictures with a camera attached to your computer. The photo displays in the upper, right-hand corner of the **Demographics** tab regardless of the method you use to attach it.

**Note:** Before you attempt to attach any picture, make sure you have the correct patron record displayed in the **Add/Modify Patrons** dialog box.

Do the following to import an existing image file:

1. From the **Demographics** tab, click the **Browse...** button beneath the **Picture** field to access the **Open** dialog box.
2. Find your picture file, and then click **Open** to insert the file path into the **Picture** field.
3. Click the **Save Changes** button, and the picture becomes associated with that patron's record.

Do the following to take a picture with an attached digital camera:

1. From the **Demographics** tab, click the **Photo...** button to open a **QuickCam** dialog box.
2. Focus the camera and then click **Take the Picture**. When the picture is taken, a cropping dialog box opens. Use this dialog box to cut excess background out of the picture.
3. Crop the image by clicking and dragging over the picture to drop a box around the part of the image you wish to use.
4. Once you have the box drawn, click **Crop the Picture**.
5. Click **OK**. The picture is attached to the patron's record.
6. Save the picture in the product installation directory under the two succeeding folders: **\Patrons\Pictures**. By default, the full path is: **C:\Book Systems, Inc\Concourse\Patrons\Pictures**.

**Note:** This is the default location; if your Concourse was installed in a different location, click **Help | About Concourse** from Concourse's menu bar to find the appropriate directory.

7. Click the **Save Changes** button.

## Modifying Patron Records

Once you have added a patron record and saved it, you can return to it at any time to make changes to keep the patron information up to date.

1. Click the **PATRON** button on the **Navigator Toolbar**.
2. Click the **Add/Modify Patrons** button on the flow chart to open the **Add/Modify Patrons** dialog box.
3. In the **Patron-ID** field, enter the patron's ID, and press **Enter** or **Tab**. The patron's record displays in the **Add/Modify Patrons** dialog box.

**Note:** You can also click the **Lookup** button from the dialog box toolbar to search for the patron's ID. For more information about looking up patrons, see the "Patron Lookup" section later in this chapter.

4. Modify the necessary information.
5. Click the **Save Changes** button to keep your work.

## DoubleChecking Records

Concourse enables you to double-check both patron and item records. The **DoubleCheck** feature is a toggle: click once to turn it on and again to turn it off. Once **DoubleCheck** is turned on, Concourse automatically locates the records that you have added or modified since the last time you used **DoubleCheck** and places them into a queue. Any records in the queue stay there until someone with the correct worker permissions enabled marks them as double-checked.



1. Click **DoubleCheck On/Off** from the toolbar of either the **Add/Modify Items** or **Add/Modify Patrons** dialog box to enable the **DoubleCheck** feature. The **DoubleCheck This Record** button and **Skip To Next Record** button become enabled. Concourse asks if you would like to apply a filter.
2. If you want to filter the records that will be added to the queue, click **Yes** and specify your criteria (see the “Filtering” section in **Chapter 2**); otherwise, click **No**. For example, if you want to double-check patron records for only the library or school faculty, specify the filter **Patron Class equals Faculty**. You can double-check those records and then move to a different set of records. Concourse presents the first record in the queue that has not yet been double-checked.
3. If the record is correct, click **DoubleCheck This Record** from the toolbar. If it is not correct, make the necessary edits and click **Save Changes** from the toolbar; the record is saved and moved to the end of the queue. The next record in the queue displays.
4. Continue clicking **DoubleCheck This Record** as you approve the records.
5. If you are unsure about a record, click **Skip To Next Record**. The record is replaced by the next record in the queue. The skipped record moves to the end of the queue.

**Note:** If you close the **Add/Modify** dialog box and then return to it later, the skipped record displays first in the queue.

6. When you no longer need the feature, click **DoubleCheck on/off** to turn the feature off.

**Note:** If you modify a record and click **DoubleCheck This Record**, the next time you open **DoubleCheck**, the record is *not* in the queue. If you modify a record in the **DoubleCheck** queue and click **Save Changes**, the next time you open **DoubleCheck**, that record is in the queue.

## Halting DoubleCheck

- If you need to stop double-checking for a while, click **DoubleCheck on/off**. Concourse turns off **DoubleCheck** and displays the next available ID number so that you may add or edit a record.
- If you want to resume double-checking later, click **DoubleCheck on/off** to turn **DoubleCheck** on again.

- Make the appropriate selection when Concourse prompts you about a filter. Concourse displays either the information for the first ID number that you skipped, if any were skipped, or the next record in the queue.

---

## Patron Lookup


You can use the **Patron Lookup** dialog box when you are searching for a single record while performing a task. Searching from this dialog box retrieves the patron record and, if applicable, automatically pulls the record into the dialog box you currently have open.

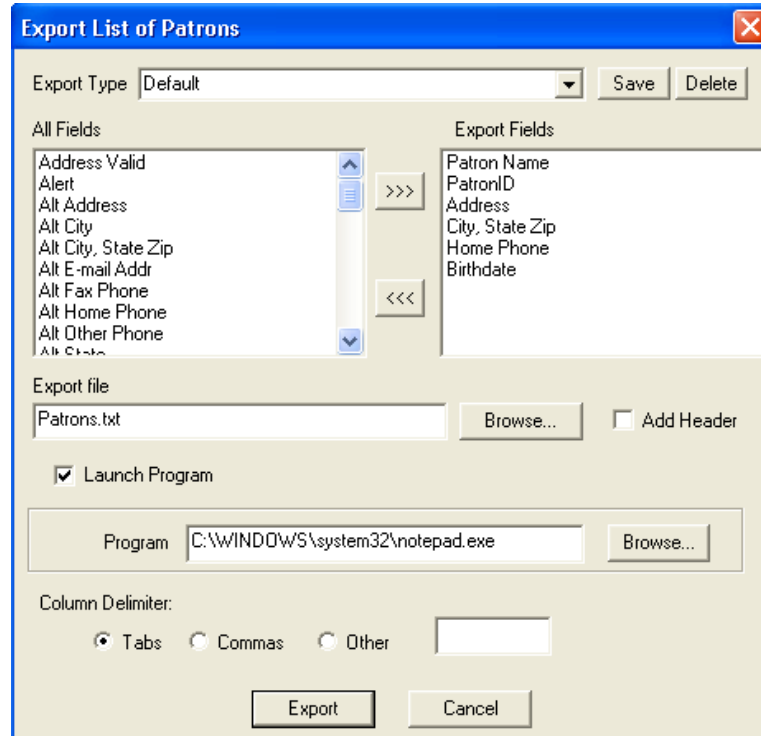
1. Access the **Patron Lookup** dialog box in one of the following ways:
  - Click the **Lookup** button in the **Add/Modify Patrons** dialog box.
  - Click the **Lookup Patron...** button from the **Circulation Desk** dialog box.
  - With the **Add/Modify Patrons** dialog box open, click **Edit | Lookup Record** from the menu bar
2. Search for the patron by entering criteria in one or two fields. Link multiple search criteria with the Boolean operators **And**, **Or**, or **Not**.
3. If more than one patron matches your search criteria, a **Search Results Summary** dialog box opens. Click the correct patron, and then click the **Select** button to use the patron record.

---

## Exporting Patron Records

You can use the **Export Patron** feature to create and export a text file of patron data. This file is formatted like a report and displays in a **List of Patrons** dialog box so that you can modify it like other reports. For more information about the **List of Patrons** report, see the “List of Patrons” section in **Chapter 8**.

1. Click the **PATRON** button on the **Navigator Toolbar**
2. Click the **Export Patrons** button on the flow chart. Concourse asks if you need to specify a filter.
3. Click **Yes** to set your criteria (see the “Filtering” section in **Chapter 2**); otherwise, click **No**.
4. A **Please Wait ... Processing** dialog box displays while Concourse generates the **List of Patrons** report.
5. Click the **Export Patron data** button  from the report’s toolbar to open the **Export List of Patrons** dialog box. Look over the **Export Fields** list; these are the columns that will be included in your report.



6. If you have created export types, you can click the **Export Type** drop-down button, and click again to make a selection. The options on the **Export List of Patrons** dialog box change to match the export type; skip to step 13. If you are not applying an export type, continue with step 7.

**Note:** See the following section for instructions on how to create and modify export types.

7. To add fields to the **Export Fields** list, click the appropriate field(s) in the **All Fields** list and then click the **>>>** button. You can only select one field at a time but may add as many fields as needed to the report.
8. To delete fields from the **Export Fields** list, click the appropriate field(s) in the **Export Fields** list and then click the **<<<** button. You can only select one field at a time but may delete any fields you do not need on the report.
9. In the **Export file** field, enter a name and location for your new file. You can also click the **Browse...** button to access the **Open** dialog box where you can select a file and/or location for the file to be saved. The default name is **Patrons.txt**.
10. Click the **Add Header** check box if you would like the columns in your text file to be named. The column names correspond to the **Export Fields** names and will display along the top of the report.
11. Click **Launch Program** if you are exporting to another program or need to use another program to view your exported patrons when the process is complete. The **Program** field and corresponding button are enabled. Enter the location of that program or use the **Browse...** button to search for that program.
12. Choose the type of delimiter used for this export file in the **Column Delimiter:** section. A delimiter separates each piece of information in the file so that a program can read the export file. Click the **Tabs** or **Commas** radio button, or click the **Other** radio button and then enter a delimiter in the corresponding field.

13. To export the data, click the **Export** button.
14. A message confirms the number of records exported to the location/file you specified; click **OK** to dismiss the message dialog box. To access your export file, simply browse to its location and double-click the appropriate file.

## Adding or Modifying an Export Type

If you know that you will routinely export patrons using specific filter criteria or that includes specific fields, you could create an export type to save you from configuring the **List of Patrons** report each time you export. In the **Export Type** field, you can save templates that will automatically load the fields you specify in the **Export Fields** list. A default export type is already preset in the system; use the following steps to create a new type or modify an existing one.

1. On the **Export List of Patrons** dialog box, specify the type in the **Export Type** field (at the top) in one of the following ways:
  - If you are adding a new export type, enter a name for the new template, for example, **Patron2b**.
  - If you are editing or deleting an existing export type, click the drop-down button, and click again to select a type from the list.
2. If you are adding or modifying an export type, configure the options as directed in the previous section.
3. If you are deleting an existing export type, click **Delete**.
4. Click **Save** to keep your changes. A confirmation dialog box displays, telling you that the export type has been saved successfully.
5. Click **OK** to dismiss the dialog box.

---

## Move Patrons

You can use the **Move Patrons** feature to change the data in multiple patron records at one time. You can edit the patron class, user-defined fields, and marital status/grade level (depending on your configuration options).

**Note:** This feature is not available in Concourse Pro.

1. Click the **PATRON** button on the **Navigator Toolbar**.
2. Click the **Move Patrons** button to open the **Move Patrons** dialog box.
3. There are five fields you can change in your patrons' record. Click the check box for any field you need to change, and then use the corresponding drop-down list or field to specify the new data:
  - If you need to change the patron class, click the **Patron Class** check box. Then click the drop-down button, and click again to select the new patron class.
  - If you need to change a user defined field, click the appropriate check box, and then enter the new data in the corresponding field.

- If you need to change the marital status or grade level, click the **Change Marital Status** or **Change Grade Level** check box (name depends on your configuration options), and then enter the new data in the corresponding field.
  - **Important!** When changing grade level, be sure to change patron records in the highest grade first and then work down to the next grade so that patrons are not unintentionally moved more than one grade at a time.
4. To insert the patron records you need to change in the queue, use one of the following methods:
    - Scan or enter the barcodes of each patron into the **Patron Barcode** field and click the **Enter ID** button.
    - Click the **Filter** button to build a filter for sorting through all of your patron records to find the right patrons.
  5. If needed, enter a note in the **Comment** field; this text is added to the **Comment** field in the patron record (**Add/Modify Patrons** dialog box) when you move the patrons.
  6. Once you have specified the data you need to change and entered the patron records, click the **Move Patrons** button.
  7. Concourse asks if you want to change those patron records. Click **Yes** to continue; otherwise, click **No**.
  8. If you clicked **Yes**, Concourse changes the patron records. A **Please Wait ... Processing** dialog box displays, showing the percentage of records updated. When the process is complete, your records are updated, and you can build a patron report or look up a specific patron to view those changes.

---

## Form Letters

The **Form Letter** feature provides the ability to send the same letter to a group of patrons even though you are personalizing each letter with patron-specific information. The key to sending your own notices via form letter is the **Merge Field** option, which allows you to add fields that will automatically insert patron information when the letter is printed or e-mailed. For more information about this option, see the “Merge Fields” section later in this chapter.

To access this feature, click the **PATRON** button on the **Navigator Toolbar**. Then click the **Form Letters** button on the flow chart to open the shortcut menu, where you can select one of the following options:

- **New...** opens a blank **Form Letter** window where you can create a new letter.
- **Edit...** accesses the **Open** dialog box, which allows you to select a saved letter to edit. Concourse supplies four pre-configured letters:
  - **EveryItemE.rtf** lists the items that the patron currently has checked out.
  - **OverDueNoticeE.RTF** lists all items that are currently overdue.
  - **OverDueNoticewithCostsE.RTF** lists all items that are currently overdue along with estimated fines for those items.

- **PickupAvailableE.RTF** notifies the patron that his or her reserved item(s) are now available.
- **UnpaidFinesE.RTF** notifies the patron of all outstanding fines, along with information about each associated item.
- **Print...** accesses the **Open** dialog box, which allows you to select a saved letter to print. Once you have chosen a letter, the **Form Letter Print Wizard** opens, with the contents of the letter displayed in the **Form Letter** dialog box in the background.
- **Most recently used file list (1-4)** allows you to select one of the last four form letters accessed.

## Form Letter Editor Tools

The **Form Letter** window displays similar to any standard word processing window; however, the functions included here are limited to those you need to generate your form letters.

The following Windows-standard edit functions are available in the **Form Letter** dialog box. You can perform these operations by clicking **Edit** from Concourse's menu bar and then clicking the appropriate option, or you can press the key sequences specified below:

- **Cut (Ctrl + X)** removes the selected text and places a copy on your system's clipboard so that you can paste it to another location.
- **Copy (Ctrl + C)** copies the selected text to your system's clipboard so that you can paste it to another location.
- **Paste (Ctrl + V)** pastes cut or copied text at the insertion point.
- **Undo (Ctrl + Z)** deletes the last change; you can undo up to two steps.
- **Select All (Ctrl + A)** selects all of the text in the form letter.

The following Windows-standard file functions are also available in the **Form Letter** dialog box. Click **File** from Concourse's menu bar, and then click the appropriate option:

- **New** refreshes the **Form Letter** window to a blank one.
- **Open...** accesses the **Open** dialog box where you can select a file for edit.
- **Close** dismisses the file you are editing. If you have made any changes, a dialog box displays, asking if you want to save your changes. Click **Yes** to save changes; click **No** to close without saving, or click **Cancel** to keep working in the file.
- **Save (Ctrl + S)** stores the form letter under the current file name. If you are working in a new form letter that has not been saved, the **Save As** dialog box opens where you can specify a name and location for the file.
- **Save As...** opens the **Save As** dialog box where you can store the file under a new file name.

Use the following toolbar options to build your form letters; place your cursor over each button to see a flyout with the name:



- Click **Save** to keep changes that you have made to a form letter.
- Click **Print** to open the **Form Letter Print Wizard: Select Patrons** dialog box, which allows you to specify which patrons should receive the letter and the method of sending it.
- Click **Preview** to see a print preview display in the **Form Letter** window. If you need to make changes, click **Edit** to return to edit mode.
- Click **Letter/E-mail status** to open the **Review History** dialog box, which allows you to see if form letters were successfully mailed/e-mailed to patrons.
- Click **Insert Field** to insert various merge fields into the letter, such as patron names, addresses, overdue items, etc.
- Click **Font** to open the **Font Selection** dialog box where you can choose the letter's font style and size.
- Click **Bold**, **Italics**, or **Underline** to format selected text. Highlight the text you needed 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 move the paragraphs to the left-hand margin, the right-hand margin, or the center. New form letters are left justified by default.
- Click **Double space** to set the line spacing to double for the selected paragraphs. If you need to return the selected paragraphs to single-spacing, click this button again.
- Click **Left indent**, **Right indent**, and **Hanging indent** to move the corresponding margins by a half inch each time they are selected. You must highlight the paragraphs you are modifying. If you need to move the margins back to the original position or set them to smaller intervals, click and drag the margin arrows in the ruler bar.
- Set a tab within the currently selected paragraph by clicking on the ruler, a small arrow displays on the ruler to indicate the presence of the tab stop.

## Writing a Form Letter

You can use the pre-configured form letters delivered with Concourse, or you can create your own form letters for any type of notification you need to send.

1. Click the **PATRON** button on the **Navigator Toolbar**.
2. Click the **Form Letters** button on the flow chart to open a shortcut menu.
3. Click **New...** to open a blank **Form Letter** window.


4. Type the letter, adding any fields or formatting changes that you need. For more information about adding merge fields, see the “Merge Fields” section below.
5. Once you have completed the letter, click the **Save** button to open the **Save As** dialog box.
6. If needed, click the **Save in:** drop-down button, and click again to select the location where you want the form letter saved. By default, the location is the **FORMLTRS** folder delivered with Concourse.
7. In the **File name:** field, enter the name of your letter.
8. Click **Save**.

## Merge Fields

These fields allow you to create a generic letter and instruct Concourse to fill in patron-specific information from the database as the letters are printed or e-mailed. For instance, if you add the **Patron Name** and **Address** merge fields, each patron’s name and address is automatically pulled from the Concourse database and inserted into the letter(s). One letter is generated for each patron included in the merge.

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

<MergeFieldName>

When you click the **Insert Field** button  on the window’s toolbar, you are provided with an extensive list of merge fields. The fields refer to patron record and circulation information (such as a patron’s address or overdue items).

After you have created your form letter, you will use the **Form Letter Print Wizard** to select a group of patrons to be merged with your form letter. For example, if you want to send overdue notices to your adult patrons only, you can add **OVERDUE#** fields to your form letter and then filter for patrons with the Adult patron class from the **Form Letter Print Wizard: Select Patrons**. You can apply different filters or manually include/exclude individual patrons from the list of who is getting letters.

### Adding Merge Fields to Form Letters

1. Access the form letter you need to edit.
2. Click to place your cursor where you intend to insert the field in the letter.
3. Click the **Insert Field** button. The **Select Field to Insert** dialog box opens, containing a list of available fields.
4. Click to select a *patron* field to insert.

**Note:** You may type the first letter of the field to find your field more quickly. For example, to select **Patron First Name**, type a **P** to skip to the first choice that begins with a “p.” Then click the field you need.

5. Click **OK**. The field displays with a double-underline in the **Form Letter** dialog box.

<Patron First Name>

6. Repeat this process until all needed fields are added.

**Note:** If you add the **Current Date** field, the **Select Date Format** dialog box opens; click to select the option you prefer, and then click **OK** to insert the field. If you add an *item* merge field (such as **FINE#**), the **Select Subfield to Insert** dialog box opens where you must click to select a subfield, specify the record number, and then click **OK**. For more information about subfields, see the following section.

### Adding Item Merge Subfields to Form Letters

Item merge fields can be added to form letters to include items in specific circulation states, such as available, overdue, and so forth. Each item merge field requires a subfield: the main field references the individual record, and the subfield specifies additional information that can help identify each item (title, author name, etc.).

1. From the appropriate form letter, click the **Insert Field** button on the window's toolbar to open the **Select Field to Insert** dialog box.
2. Click to select any item merge field; these are noted with a # character:
  - **AVAILABLE#** – reserved items that are now available.
  - **FINE#** – items that have outstanding fines attached.
  - **ITEM#** – items checked out to the patron.
  - **OVERDUE#** – overdue items.
  - **RESERVE#** – all reserved items, regardless of availability.
3. Click **OK**. The **Select Subfield to Insert** dialog box opens.
4. Click to select a subfield from the list that will help patrons identify the item, such as **Title**.
5. In the **Record** field, enter the number of the record for which the information is to be added.

**Note:** Each item merge field only draws a *single* record, so you must specify the number of the record. For instance, if you have a list of 5 overdue items and specify **1** in the **Record** field, the subfield will be added for the first record. The example below illustrates how the field displays in the form letter.

**<OVERDUE#1.Title>**

6. Click **OK**, and the field is inserted into your form letter.
7. Repeat these steps as needed to add an item merge field for *each* record the patron has overdue, available, etc.

**Important!** Be sure to add as many item merge fields as you may possibly need. Extra item merge fields are not automatically included in the letter. Multiple fields of the same type should be numbered sequentially using the **Record** field (see below).

**<OVERDUE#1.Title>**  
**<OVERDUE#2.Title>**  
**<OVERDUE#3.Title>**

## Editing a Form Letter

You can edit the pre-configured form letters that come with Concourse as well as the merge fields that are displayed within them.


1. Click the **PATRON** button on the **Navigator Toolbar**.
2. Click the **Form Letters** button on the flow chart to open a shortcut menu.
3. Click **Edit...** to access the **Open** dialog box.
4. Click to select the letter you need to edit.
5. Click **Open**. The letter displays in the **Form Letter** window.
6. Make any necessary changes, including adding and deleting fields or reformatting text.

**Note:** Refer to the previous section for more information on adding and deleting fields and making format changes.

7. If you want to save your modifications as a *new* form letter, click **File | Save As...** to open the **Save As** dialog box, enter a new name in the **File name:** field, and click **Save**. Your changes are saved under the new file name and do not affect the original form letter.
8. If you want to update the original form letter with your modifications, click **Save**. Your changes are saved under the name of the original letter, overwriting that letter so that it is no longer available.

## Previewing a Form Letter

The **Print Preview** option is Windows-standard. Before you print, you can use the option to review the first few pages of your form letter to verify that they look correct.

1. Open the form letter you need to preview in the **Form Letter** window.
2. Click the **Print Preview**  button on the window's toolbar to see the **Print Preview**; you can review any of the pages to be printed.
  - Click the **Two Page** or **One Page** button to toggle between a 2-page and 1-page display.
  - Use the scroll bar to view the next or previous page.
  - Click the drop-down button in the upper, left-hand corner, and click again to select a percentage of magnification. By default, **Fitted** is selected, which fits the preview to the window so you can see the full page; select the other choices to zoom in or out as needed.
  - When you have finished previewing your letter, click **Print** to open the **Form Letter Print Wizard: Select Patrons** dialog box if you are satisfied with the pages.
  - Click **Edit** to return to edit mode.

## Printing a Form Letter

The **Form Letter Print Wizard** consists of three main dialog boxes that allow you to limit the patrons that receive a form letter and determine how that letter will be delivered.

1. With a letter displayed in the **Form Letter** window, click the **Print**  button on the window's toolbar. The **Form Letter Print Wizard: Select Patrons** dialog box opens, allowing you to specify which patron records will be included in a specific report or form letter.

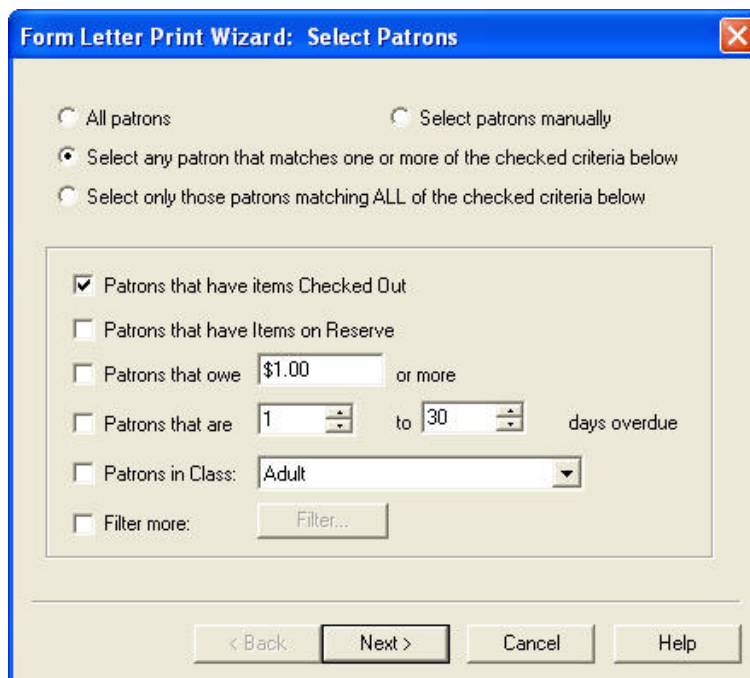
2. Select one of the following radio buttons:

- **All patrons** includes all of the patrons in your database. If you select this option, the remainder of the dialog box is disabled because no further filter criteria are required.

- **Select patrons manually** allows you to select the patrons using the **Add Patron...** option on the next dialog box; when this is selected, the rest of the dialog box is disabled.
- **Select any patron that matches one or more of the checked criteria below** allows you to filter for a specific group of patrons using the other options on the dialog. 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 in the form letter merge.
- **Select only those patrons matching ALL of the checked criteria below** allows you to filter for a specific group of patrons using the other options on the dialog. All criteria is joined with the Boolean operator **AND**, meaning that *all* of the 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 on the dialog box, you must now establish your filter criteria. Click the check boxes to enable the criteria, and then enter data in the fields or use the drop-down lists to select data as applicable.

- **Patrons that have items Checked Out** includes only patrons that have items checked out.



- **Patrons that have Items on Reserve** includes only patrons that have items reserved.
- **Patrons that owe {amount} or more** includes only patrons that owe the specified amount. (Enter the appropriate amount into the field provided.)
- **Patrons who are {quantity} to {quantity} days overdue** includes only patrons that have items overdue by a specified period of time. (Click the arrows or enter the number of days in both quantity fields to specify a time range.)
- **Patrons in Class** includes only the patrons in a specified class. (Click the drop-down button, and click again to select a class.)
- **Filter more** opens the **Build Filter** dialog box where you can further refine your criteria. See the “Build Filter Dialog Box” section in **Chapter 2** for more information.

**Note:** The **Build Filter** dialog box opens automatically when you select the check box. If you close the **Build Filter** dialog box, you may reopen it by selecting **Filter....**

4. Click **Next >**. The **Form Letter Print Wizard: Edit Patron List** dialog box opens.
5. If you clicked the **Select patrons manually** radio button in step 2, you should click **Add Patron...** to open the **Patron Lookup** dialog box where you can find a patron; see the “Patron Lookup” section earlier in this chapter.
6. If needed, you can remove individual patrons from the list. Click to highlight the patron in the list and then click **Remove Patron**.
7. To sort the list, click to select a sort option from the **Order by:** section and then click **Apply Sort**. For example, if you want to sort your patrons in alphabetical order by their last name, click the **Patron Name** radio button before you click **Apply Sort**.
8. Click **Next >**. The **Form Letter Print Wizard: Output** dialog box opens. This dialog box allows you to select the method you want to use to distribute your form letters.
9. Click to select all the check boxes that apply in the **Select output method** section. You may choose both the e-mailing and printing options, or you may choose just one.
  - **E-mail to Patron** – sends the form letter via e-mail.

**Note:** If you want a subject to display in the subject line of each e-mail, enter the subject of your form letter in the **E-mail Subject** field. If you need to configure settings for your e-mails, click **E-mail Settings**; refer to the Concourse Help files for instructions.

  - **Send to Printer** – prints the form letters.
  - **Only print if no e-mail address for the patron** – if you clicked the **E-mail to Patron** check box, you can select this option to print form letters for the patrons in your list that do not have valid e-mail addresses entered into the database.
  - **Collate for cutting** – if you clicked the **Send to Printer** check box, you can select this option to ensure that short letters will be aligned on the page so that you can separate them in bulk with a paper cutter.

- **Number per page:** – if you clicked the **Send to Printer** check box, you can select this option to specify the number of short letters you want to print on each page.
- **Log in History** – records this history action so it displays in the **Review History** report.

10. Click **Finish**.

11. If you clicked the **Send to Printer** check box, the **Print** dialog box opens. Click **OK** to print the form letters. The **Please Wait ... Processing** dialog box shows the progress of your print job.

12. If you clicked the **E-mail to Patron** check box, the **New Letter / E-mail Functionality** dialog box opens, suggesting that you click the **Letter/E-mail status** button to see the success/failure status of your action. Click **OK** to dismiss the dialog box.

**Note:** If you do not want to see this dialog box each time, click the **Don't Show this dialog** check box before clicking **OK**.

## Chapter 5: Cataloging

Concourse provides several methods of cataloging the items in your library. You can create item records by manually entering data in the **Add/Modify Items** dialog box, or you may import records from a vendor disk, eZcat, or eZcat Pro.

This section discusses all of these options. The simplest way to add items is to use eZcat. For more information about eZcat, see the “Importing and Exporting MARC Records” section later in this chapter, visit our Web site, or view the **Importing Records from eZcat** topic in the Concourse Help files.

**Important!** If you are a new Concourse user, you 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 set up advanced configurations more quickly than the file. See the “Configuration Settings” section in **Chapter 11** for detailed information.

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### Add/Modify Items

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

To open this dialog box, click the **CATALOG** button on the **Navigator Toolbar**, and then click the **Add/Modify Items** button on the flow chart.

The setup of this dialog box depends on whether you are using Concourse or Concourse Pro. In regular Concourse, the dialog box includes **Item-ID** and **Title** 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 items using regular Concourse; for more information about cataloging items with Concourse *Pro*, refer to the **Creating/Editing a MARC Record** topic in the Help files.

Creating New Item 00000078

Item-ID: 00000078 Title: \_\_\_\_\_

Copyof: \_\_\_\_\_ Add copy: One Many

**Core** Analytics Other Media Programs MARC Card

Age Group: Juvenile Material Type: Book

Circ Type: Circulation Report Class: Fiction

Author (Last, First): \_\_\_\_\_

Call Number: \_\_\_\_\_

Publisher: \_\_\_\_\_ Date: \_\_\_\_\_ Edition: \_\_\_\_\_

Place of Pub.: \_\_\_\_\_ Source: \_\_\_\_\_

Cost: \$0.00 Purchase date: / / Entry Date: / /

Location: Main Library ISBN: \_\_\_\_\_ LCCN: \_\_\_\_\_

The **Add/Modify Items** dialog box contains seven tabs that group the item’s information into meaningful areas. The **Core** tab is selected by default; simply click the other tab names to switch between them.

Initially, there is no information in the dialog box except the next available item ID number and the five item classes you defined and determined as your defaults (for **Age Group, Material Type, Circ Type, Report Class, and Location**).

Three fields display above the tabs so that you can see them no matter which tab you have on top:

- **Item-ID** – This field is required. If you are using 8-digit barcodes, this field is also the barcode or accession number field. If you want to keep the next available number that displays here by default, press **Tab**. Otherwise, if the item already has an ID/barcode number, you can scan or enter that number into the **Item-ID** field, assuming it has not already been used. If you enter a larger item ID number, this changes the **ItemID Type** setting, which has a permanent effect on the next available item ID. See the “Edit ItemID Types” section in **Chapter 3** for a more detailed explanation.



**Note:** If you are using a non-standard barcode length, Concourse adds a **Barcode** field to the **Add/Modify Items** dialog box. This accommodates differing item ID/barcode numbers.

- **Title** – This field is required. Titles can be formatted in any way, but conventionally, only the first letter is capitalized unless there is a proper name. Do not end the title with a period. Instead, punctuate the end of a title only if it ends with a question mark or an exclamation point.
- **Copyof** – This field links items in the database. It contains the ID/barcode number of the original item. In other words, it tells you that current item **12345** is a copy of item **12323**. See the “Reviewing and Editing Your Copy Information” later in this chapter for more information.








## Cataloging Toolbar

The toolbar across the top of the **Add/Modify Items** dialog box allows you to perform several important activities; **Table 2: Cataloging Toolbar** describes each button from left to right.

**Table 2: Cataloging Toolbar**

	<p><b>Lookup</b> opens the <b>Catalog Lookup</b> dialog box where you can locate an item record. This function is also available in the menu bar as <b>Edit   Lookup Record</b>.</p>
	<p><b>Save Changes</b> stores the current item record. This function is also available in the menu bar as <b>Edit   Save Changes</b>.</p>

**Table 2: Cataloging Toolbar**

	<b>Clear Fields</b> empties all the fields so you can move to another task within the <b>Add/Modify Items</b> dialog box. This function is also available in the menu bar as <b>Edit   Clear Fields</b> .
	<b>Delete</b> removes the item record from your database. This function is also available in the menu bar as <b>Edit   Delete Record</b> . <b>Warning!</b> Once a record is deleted, its ID number can never be used again. <b>Note:</b> You can bulk delete item records, see the “Bulk Deleting Items” section earlier in this guide for more information.
	<b>DoubleCheck On/Off</b> enables the <b>DoubleCheck</b> feature, allowing you to double-check item records in your database. To disable <b>DoubleCheck</b> , click this button again. See the “DoubleChecking Records” section in <b>Chapter 4</b> for more information.
	<b>DoubleCheck Record</b> allows you to approve that the current item record meets library standards.
	<b>Skip Next Record</b> skips the next record in the <b>DoubleCheck</b> queue without double-checking it.
	<b>Import MARC Records On/Off</b> 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 that you can resume the same import later. (This button is only active with Level 4.)
	<b>Messages</b> 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 <b>Chapter 6</b> .

### Cataloging Tabs

There are seven colored tabs on the **Add/Modify Items** dialog box. The tabs were designed to have the look and feel of a tabbed card file. You can click on the colored portion of any tab to bring it to the top of the stack.

### Core Tab

The **Core** tab displays in red and records the basic information about an item, including the five fields that are drawn from the item classes (see 1<sup>st</sup> bullet below). The following fields display on this tab:

- **Age Group, Material Type, Circ Type, Report Class,** and **Location** record the item classes you established when you first began to organize your database. The defaults in the item class display in this tab, but you can select other classifications as needed. Simply click the drop-down button to open a list of choices, and click again to select an item class.

- **Author (Last, First)** records the main author's name only. Joint authors should be entered into the **Author Analytics** field on the **Analytics** tab. Leave the **Author** field blank if the item is cataloged only by title. If there is a corporate author, enter that information here, using punctuation as necessary to separate divisions of names, structures, and/or committees.

**Tip!** If you are unsure of an author's name and have an **AUTHORITY** license, you can verify the name in the **Name Authority Report**.

- **Call Number** records the item's Call Number as it would display on the spine label. There are six fields allocated for the information. Each line of your Call Number should be recorded in a separate field, but you are not required to use them all.

**Note:** The Call Number usually contains at least two lines. For libraries that use the Dewey Decimal System of classification, the first line contains the Dewey Decimal number identifying the item's subject assignment (for example, biography, audiovisual, and fiction materials may have first lines that begin with alphabetic characters). The second line of the Call Number is usually the first three letters of the author's last name or the first three letters of the first significant word of a title. Although 3 characters is the standard, this field can recall from 1-16 characters.

- **Publisher** records the name of the publisher. Enter this information as you want it to display on the card image.
- **Date** records the most current date of publication, which may or may not be the copyright date. Enter a copyright date as "c" followed by a date, i.e., **c1992**. A production date is prefixed with a "p," i.e., **p1992**. A printing date is entered with a space before the date, i.e., **1992**. If you do not wish to specify a date, you can leave this field blank or enter **n.d.** in the field.
- **Edition** records the edition specification, such as a 2<sup>nd</sup> Edition, a Collector's Edition, etc.
- **Place of Publication** records the location of the publishing house. If the place is a prominent city, use only the city name, but for less well-known places, enter both the city and the state.
- **Source** can record where you retrieved catalog information, where you obtained the amount to purchase the material, the vendor from whom you purchased the material, or a combination of all three.
- **Cost** records the purchase or retail price of the material. This field has a floating decimal and dollar sign; for example, to specify ten dollars, enter **10** and it will display as **\$10.00**.
- **Purchase Date** and **Entry Date** records both the date the item was purchased and the date the record was added to the database. See the "Entering Dates" section in **Chapter 2** for more information.
- **Location** records the physical location of the item within the library or another branch of the library. Click the drop-down button, and click again to make another selection.
- **ISBN** records the International Standard Book Number.
- **LCCN** records the Library of Congress Control Number.

## **Analytics Tab**

The **Analytics** tab displays in green. The following fields display; be sure to separate individual notations with a backslash (\):

- **Subject Headings** records your Sears List of Subject Headings, Library of Congress Subject Headings, etc. If you enter subject headings from the Sears or LCSH lists, use only those found in bold print. Do not enter any numbers, for example, **Dogs-Juvenile literature\Dogs-Humor**.

**Tip!** If you are unsure of the subject phrasing and you have an **AUTHORITY** license, you may review the listed subjects in the **Subject Authority Report**.

- **Series Title** is designed for items in a series. This information will be shown in parentheses on the back of the title page (i.e., *American Girls Collection* and *Hardy Boys*).
- **Note** describes a work but does not summarize it. Because the terms entered here are searchable, time spent adding information may prove invaluable when attempting to locate the item later. Choose your words carefully and annotate the entry in the summary field. An example might include **CONTENTS:\Chapter 1: Careers for men and women.\Chapter 2: New opportunities for women.\Chapter 3: Driving an 18-Wheeler**.
- **Summary** provides a brief synopsis of your material. Again, significant words in this field become search keywords, so time entering information here is well-spent. An example of a summary is **Original poems and rhymes celebrating nature**.
- **Stmt of Resp** records pertinent information on the title page, including statements of authorship such as **Kevin Wicker: with a foreword by David Pritchard; illustrated by Karel Feuerstein**. Do not use a backslash to separate information.
- **T. Analytics** records additional title information and titles within titles, for example: **The Gettysburg Address, p. 98.\The Eighteenth Amendment, p. 135**.
- **A. Analytics** records additional author information, joint authors, and editors.
- **S. Analytics** records a subject within a work. For instance, **American documents** may be the information stored here for the previous **Title Analytics** example.
- **Artist** records the name(s) of illustrators, musicians, and/or performers of a media item.

## **Other Tab**

The **Other** tab displays in yellow and enables you to record information about donors and memorials, technical descriptions, and parallel and uniform titles. It also includes the initials of the worker who last updated the record. Separate multiple notations with a backslash (\).

- **Donor** – information about the person or organization that donated the item.
- **In Memory Of** – information about the person for whom the item is a memorial.
- **In Honor Of** – information about the person being honored by the item.

- **Comment** – information about a material that may be useful to library workers. This information will not display on the card image but can be retrieved in a report with a filter. You may use this field to include notes about the item's condition or its absence during inventory. If you wish to record a donor's address but do not wish to display it publicly, use this field to record that information as well.
- **Tech. Desc.** – information about the item, such as the number of pages or illustrations or the physical size. For audiovisual materials, you might like to include information like feature length, number of frames, number of tracks, and video format.
- **Dimen.** – the item's measurements, such as height, length, and width.
- **Parallel Title** - a translation or an additional title. For instance, *Caperucita Roja* (*Little Red Riding Hood*).
- **Uniform Title** – the item's popular title. For instance, *'Twas the Night Before Christmas* (*A Visit from St. Nicolas*).
- **Last Updated By** – the initials of the worker who modified the record last as well as the date and time it was edited. (This field is automatically recorded/updated by Concourse but is not completed until the record has been saved.)
- **Needs to be printed** – check boxes that indicate whether or not cards, spines, and pocket and/or barcode labels have been printed for this item.

**Note:** Concourse offers you the option to automatically select these check boxes after printing. You may also add them manually by accessing the **Add/Modify Items** dialog box and clicking to select them. For more information about printing these labels, see the "Barcode Labels" or "Spine and Pocket Labels" sections in **Chapter 14**.

### Media Tab

The **Media** tab displays in pink and enables you to link multimedia files to an item so that your patrons can view related images, videos, etc. or listen to audio files. For example, if you have a book in your library entitled *Space Shuttles*, you might want to link a video clip to the book that depicts a shuttle launch, or if you have a book with a dust jacket that is easily recognized, you may want to scan the dust jacket so that you may link it to the book's record.

Concourse also makes a URL display as an active Internet link on the item's card image. In the **URL** field, enter an Internet address that relates to the item in some way; when you save the record, the link becomes available to your patrons. If you have a valid Internet connection, when they click the URL on the item's card image, the appropriate Web site opens.

The following file types are supported for each of the multimedia options.

Multimedia Type	File Type
Movies (Video)	AVI
Images	TIF, JPG, BMP
Sounds	WAV, MID

Documents	RTF, DOC
Thumbnail (Image)	TIF, JPG, BMP
Dust Jacket (Image)	TIF, JPG, BMP
URL	http://...

### Programs Tab

The **Programs** tab displays in blue. Some schools encourage children to read by instituting study programs (see “Study Programs” in **Chapter 3**). The **Programs** tab allows you to record study program information, associating that information with a particular item record. The following fields are available:

- **Program Name** – the Study Program item classes that you have previously defined in your system.
- **Reading Level** – the value or range of values representing the age(s) or grade(s) of the students who should be able to read this material.
- **Interest Level** – the value or range of values representing the age(s) or grade(s) of the students who may find this material interesting.

**Note:** The **Interest** and **Reading Levels** are assigned by the various reading programs. These values may or may not be the same. For example, even though newspapers are written at a 6th grade reading level, their target audience is adults. In this case, the interest level would be much higher than the reading level.

- **Point Value** – the number of points that the student can earn in the reading program by passing the test for the book.
- **Note** – information concerning the book and/or the reading program; for example, you might note how to find the test for the item (e.g., URL, file path, etc.).

### MARC Tab

The **MARC** tab displays in dark green and shows the MARC record associated with each item. This tab contains read-only information automatically generated by Concourse when you enter data into the first four tabs. MARC records may also be imported or exported, either selectively or in bulk. Refer to the “Importing and Exporting MARC Records” section later in this chapter for more information.

### Card Tab

The **Card** tab displays in white and is also a read-only tab created by Concourse. As you type data into the first four tabs, Concourse formats the information into an image of a catalog card.

## Data Entry Tips

- Be consistent when cataloging. Establish standard conventions to be used in all of your catalog records to make your reports and searches more effective.
- Use the shortcut keys in the date fields to quickly enter specific dates (e.g., press **T** for today, **W** for the beginning of this week, etc.). A calendar is also available from which you can select a particular date. See the “Entering Dates” section in **Chapter 2** for more details.
- If you are cataloging a large quantity of items with similar information (same author, publisher, etc.), enter the information into the first record and save it. You can then use **Ctrl + R** to copy the information from the previous record into corresponding fields of the new record. For example, if **John Grisham** was the author of two books that you are cataloging, you need only to enter his name in the **Author** field of the first record and then use **Ctrl + R** to enter his name in the **Author** field of the second record.

**Important!** **Ctrl + R** does not apply to Call Numbers. If you attempt to use this feature in a **Call Number** field, it will generate a 3 character number based on the author’s name. If the author’s name is not present, it will generate the information using the title of the item.

- Use one field for each line of a Call Number. Concourse includes six **Call Number** fields; each allows up to 16 characters of information.
- If you make a significant number of changes to your database, backup the database immediately.
- In the **Author Analytics** field, enter the names of joint authors and editors in **LastName,FirstName** format. Separate multiple names with backslashes (\).
- To quickly find an option in a long drop-down list, type the first letter of the option. For example, if want to find **Reference** in the **Circulation Type** list, type **R** to jump to the first option that begins with an **R**. If necessary, scroll down to find the option.

## Spell Check

Spell checking is available for portions of the **Catalog** module, such as the **Add/Modify** dialog box, allowing you to check for misspelled words. When you type a misspelled word in a portion of the program that supports the spell checking feature, a jagged, red line displays beneath the word(s). This line also displays beneath words that are not in the program dictionaries.

**Note:** The spell check feature is also available in sections of the **Patron** module and the optional **Authority** module.

To use spell check, follow the steps below.

1. Right-click on the underlined word(s). A right-click menu opens, displaying the following options:
  - **Suggested spellings**
  - **Add**
  - **Ignore**

- **Spell Check Options...**
  - **Undo**
  - **Select All**
2. To replace the misspelled word with a suggested spelling, click the suggested word.
  3. To add an unrecognized word to the dictionary, click **Add**.
  4. To remove the jagged, red line from an unrecognized word without adding it to the dictionary, click **Ignore**.
  5. To open the **Spell Checking Options** dialog box, click **Spell Check Options...:**
    - On the **General** tab, click to deselect any of the following options: **Check spelling as you type**, **Ignore words in UPPERCASE**, **Ignore words with numbers**, and **Ignore internet and file addresses**.
    - On the **User dictionary** tab, you can add or remove words from your dictionary.
    - On the **Common misspellings** tab, you can view common incorrect spellings and the corresponding correct spelling. You can also enter a new incorrect spelling and the correct word in the appropriate fields and click **OK** to add it to the list.
  6. Click **Undo** to delete the misspelled word or to undo the latest change if you typed any other words/characters *after* typing the misspelled word.
  7. To select all words in the field, click **Select All**.
- Note:** You can also press **F7** to open a standard **Spelling** dialog box and make your corrections from there.

## Changing Text Case

You can also choose various text case settings in sections of the **Catalog** module, such as in the **Add/Modify Items** dialog box.

**Note:** The change case feature is also available in the **Patron** module and the optional **Authority** module.

To change text case, follow the steps below.

1. Highlight the text you wish to format.
2. Click **Edit | Change Case**.
 

**Note:** If the **Change Case** option does not display on the **Edit** menu or if the submenu options in step 3 are grayed out, the selected text cannot be changed.
3. Choose a case option from the submenu that displays the following:
  - **Upper Case** capitalizes all letters of selected text.
  - **Lower Case** changes all letters of selected text to lowercase.
  - **Title Case** capitalizes the first letter of each word selected.
  - **Sentence Case** capitalizes the first letter of the first word selected.
4. The selected text changes to the case you specified.

---

## Cataloging Materials

When you catalog materials, you are simply completing the applicable fields on the **Add/Modify Items** dialog box. The only required fields are **ItemID** and **Title**; however, entering as much information as possible makes searching and reporting more efficient and accurate. Also, adding additional information, such as edition, summary, or attached multimedia files (e.g., book reviews), may help your patrons decide whether or not they want the item; this may help reduce the need to reshelv unwanted materials.

### Adding Item Records

Use the **Add/Modify Items** dialog box to add item records to your database.

1. Click the **CATALOG** button on the **Navigator Toolbar**.
2. Click the **Add/Modify Items...** button on the flow chart to open the **Add/Modify Items** dialog box. **Creating New Item *ItemID*** displays in the title bar.
3. Complete the header fields (above the tabs) as needed. Refer to the beginning of this chapter for detailed descriptions of each field.
4. Complete as many fields as possible on the following tabs: **Core**, **Analytics**, and **Other** (see related sections earlier in this chapter for details). On the **Core** tab, defaults display in the item type drop-down lists (**Age Group**, **Material Type**, **Circ Type**, **Report Class**, and **Location**). Click the drop-down button and click again to make a new selection.

**Note:** Defaults display in the item type drop-down lists, but you can make new selections as needed. Any changes you make are retained until the dialog box is closed. Therefore, if you are cataloging a large shipment of items that are of the same class, you do not need to change the defaults through the **Administration** flow chart.

5. Complete fields as needed on the **Media** tab. If necessary, click a **Browse...** button next to the appropriate field to open a dialog box where you can find and open the file. For information about linking multimedia information to an item record, see the next section.
6. If the item is part of a point-based reading program like **Accelerated Reader**, add that information on the **Programs** tab. For more details, refer to the related section earlier in this chapter.

**Note:** You will not enter any information on the **MARC** or **Card** tabs, but you can use these fields to preview the bibliographic record in MARC or card image format.

7. When your changes are complete, click the **Save Changes** button on the cataloging toolbar. The fields clear and the next available item ID displays in the **Item-ID** field, so you are ready to catalog another item.

## Attaching Multimedia Files

On the **Media** tab, enter the path to the file that you would like to add in the appropriate field. For example, if you would like to add a sample sound file that is stored in your **C:\Temp** folder, enter **C:\Temp\sound.wav** in the **Sounds** field. You may also click the corresponding **Browse...** button to access the **Open** dialog box. Navigate to the location where the file is stored, click the file, and then click **Open** to populate the field on the **Add/Modify Items** dialog box.

## Associating Study Programs

On the **Programs** tab, do the following to add information for each study program your library offers:

1. Choose the appropriate study program from the **Program Name:** drop-down list.
2. Use the **Tab** key to move through the fields in the **Add/Edit Study Programs** box and enter the relevant information in each.
3. Click the **Add** button. All of the study program information that you just entered now displays in the **Current Study Programs** list.

The screenshot shows a software interface with several tabs: Core, Analytics, Other, Media, Programs, MARC, and Card. The 'Programs' tab is selected. Below the tabs, there are two main sections: 'Current Study Programs' and 'Add/Edit Study Programs'.

**Current Study Programs:**

Name	Interest	Reading	Value	
Accelerated Reader	10	10	10	This is an school bo

**Add/Edit Study Programs:**

Program Name: Accelerated Reader (dropdown)      Point Value: 10 (text box)

Reading Level: 10 (text box)      Note: This is an upper-level high school book. (text area)

Interest Level: 10 (text box)

Buttons: Edit, Remove, Add

4. Repeat this process if the item is part of more than one reading program.

## To modify a study program assignment

1. On the **Programs** tab, click to select the program that you want to modify in the **Current Study Programs** list.
2. Click the **Edit** button to the right. The **Add** button toggles to **Save**, and all of the details for the selected program display in the **Add/Edit Study Programs** box.
3. Make needed changes in the **Program Name:**, **Reading Level:**, **Interest Level:**, **Point Value:**, and/or **Note** fields.
4. Click the **Save** button. The changes are immediately posted to the **Current Study Programs** list and the button changes back to **Add**.

## To remove a study program assignment

1. On the **Programs** tab, click to select the program that you want to modify in the **Current Study Programs** list.
2. Click the **Remove** button to the right. The entry is removed from the **Current Study Programs** list.

## Adding Copies

Once you add a valid item record, you can add one or more copies of that item. To add copies of an item, do the following on the **Add/Modify Items** dialog box.

1. In the **Item-ID** field, enter the item ID of the master record you need to copy and then press **Enter**. The record displays in the **Add/Modify Items** dialog box.

**Note:** If you do not know the ID number, click the **Lookup** button on the cataloging toolbar to search for the record.

2. Click an **Add Copy** button, either **One** or **Many**, depending on the number of copies you wish to add.
  - If you click **One**, the original item number displays in the **Copyof:** field, and the next available item ID displays in the **Item-ID** field for the new copy. A **Master** button also displays next to the **Copyof:** field, so you can access the original record if needed. The following fields of the copied record are available for edit on the **Core** and **Other** tabs: **Circ Type**, **Report Class**, **Call Number**, **Source**, **Cost**, **Purchase date**, **Entry Date**, **Location**, and **Comment**. Make changes as needed, and then click the **Save Changes** button on the cataloging toolbar.
  - If you click **Many**, the **Number of Copies** dialog box opens. Enter the number of copies in your library and click **Add**. A confirmation message displays, stating the number of copies added. The message also asks if you want a report containing your added copies. Click **Yes** to view a report; otherwise, click **No**.

## Reviewing and Editing Your Copy Information

All copies are linked to the master record. When you review a copy or a master record in the **Review Items** dialog box, the **Show Copies** button is enabled. This allows you to view a listing of all copies of the item. You may also view the item ID of the copies and/or master record from the item's card image. To review your copy information, use the following steps.

1. Click the **CIRCULATION** button on the **Navigator Toolbar**.
2. Click the **Review Item(s)** button on the flow chart to open the **Review Items** dialog box.
3. Enter the item ID of the master record in the **Item:** field.

**Note:** The master record must already exist in your database.

4. Click **Show Status** to display the status and basic information for the master record in the grid at the bottom of the dialog box.

5. Click **Show Copies** to open the **Copy List** dialog box, listing the title, the barcode of each copy, and the status of each copy.
6. When you are finished viewing the listing, click **Close**.
7. Click **Done** on the **Review Items** dialog box.
8. If you saw any changes you need to make, click **CATALOG** from the **Navigator Toolbar**, click **Add/Modify Items** from the flow chart to open the dialog box, and then enter the item ID in the **Item-ID** field.
9. Make the required changes, and click the **Save Changes** button on the cataloging toolbar.

## Modifying Items

Once an item record is in the Concourse database, you can return to the record to make modifications at any time by following the steps below.

1. Click the **CATALOG** button on the **Navigator Toolbar**.
2. Click the **Add/Modify Items...** button on the flow chart to open the **Add/Modify Items** dialog box. **Creating New Item ItemID** displays in the title bar.
3. Enter or scan the number for the item record you are modifying in the **ItemID** field and then press **Enter**. **Editing Item Title** displays in the title bar.
4. Click the tab that you want to access.
5. Use the **Tab** key to move through the fields or click in the field(s) you need to modify and make the necessary changes.
6. Change text case or correct misspelled words as needed. See previous sections for detailed instructions.
7. When you are finished, click the **Save Changes** button from the cataloging toolbar.

## Deleting Item Records

Concourse allows you to delete item records if your library does not use them anymore and if they have no outstanding issues. You would want to delete an item record if the item has been lost for a significant amount of time, and you do not plan to replace it. You might also delete out-of-date items that you are removing from your collection. You cannot delete records with unpaid fines or master records with copies linked to it.

When you delete an item record, you *cannot* re-use its ID number, so be sure that you actually want to delete the item from your database before proceeding. For example, if an item is missing from your collection, you may not want to delete the record if you are going to order a replacement copy for the item. You can change the **Item Status** to **Lost** until the new item arrives and then use the same ItemID for the replacement.

1. Click the **CATALOG** button on the **Navigator Toolbar**.
2. Click the **Add/Modify Items** button on the flow chart to open the **Add/Modify Items** dialog box. **Creating New Item ItemID** displays in the title bar.
3. Scan or enter the number for the item record you are modifying in the **Item-ID** field and then press **Enter**. **Editing Item Title** displays in the title bar.
4. Verify that this is the record you want to remove from the database and then click the **Delete** button from the cataloging toolbar. A confirmation dialog box opens.

- To delete the item, click **Yes**. Otherwise, click **No**.

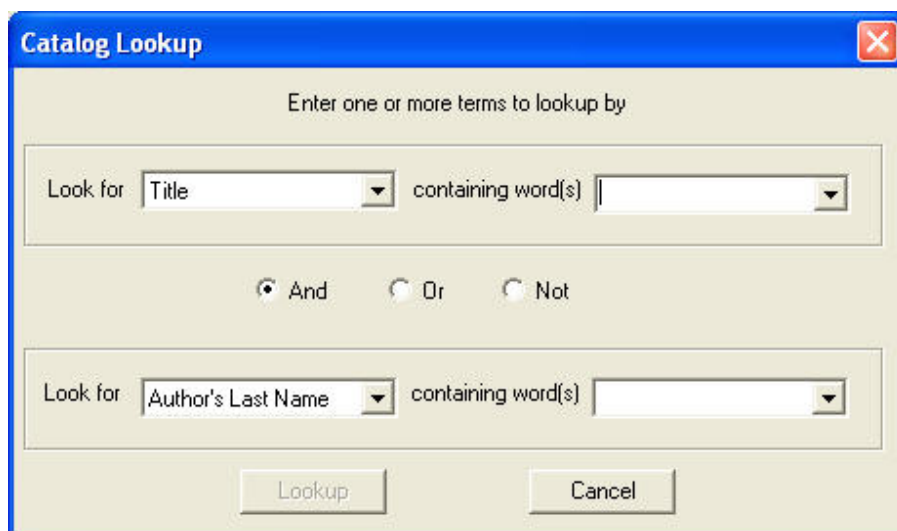
## DoubleChecking Records

Concourse enables you to double-check both item and patron records. The **DoubleCheck** feature is a toggle: click once to turn it on and once again to turn it off. Once **DoubleCheck** is turned on, Concourse automatically locates the records that you have added or modified since the last time you used **DoubleCheck** and places them into a DoubleCheck queue. Any records that are in the DoubleCheck queue stay there until someone with the correct worker permissions enabled marks them as double-checked. For more information, see the “DoubleChecking Records” section in **Chapter 4**.

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## Catalog Lookup

When you are working with catalog records, you may see a **Lookup** button. You can click this button to access the **Catalog Lookup** dialog box where you can search for an item record. Searching from this dialog box will retrieve an item and, if applicable, insert it into the area from which you are searching. **Catalog Lookup** is only available when you are looking up a single record while performing a task.



You can look up an item by entering one or two lines of search criteria. Link two filters with the Boolean operators **And**, **Or**, or **Not**. For more information, see the “Boolean Operators” section in **Chapter 2**.

If your search criteria match more than one item, the **Search Results** dialog box opens. Click the correct item and then click the **Select** button.

**Note:** If your search returns only one item, the record or ID is inserted into the appropriate field or dialog box depending on the task you are performing.

Click the **Cancel** button to close the dialog box.

---

## Comparing Two Item Records

Concourse allows you to compare item records. You have the option to modify any of the information in either record or copy data from one record to the other, which is called merging.

There are two ways to open the **Comparing** dialog box in Concourse: while adding a new record to the database or from the **CATALOG** flow chart.

### Comparing while adding a new item to the database

When you are adding a new record, Concourse looks for similar titles in your database; this happens if you are creating a record manually (after you enter the title) and when you are importing a record. If similar titles are found, Concourse gives you the option to view a list of them.

- Click **Yes** at the prompt to access the **Select from Search Results** dialog box, which displays the records with similar titles.
- If there is more than one item in the list, click to select the item record that you want to compare with the import record.
- Click the **Compare** button at the bottom of the dialog box. The **Comparing** dialog box opens. The record you are adding (manual or import) displays in the left column, and the record you selected for comparison is on the right.

### Comparing from the Concourse Navigator

If you want to compare two items in your database for any reason, you can access this feature from the **CATALOG** flow chart. For example, if you search for an item and find two or more matches for the same title, you may want to compare the items to find out if they are duplicates. If you actually have duplicate items in your database, you can edit the duplicate to make it a copy of the master record. On comparison, however, you may find that the items are not duplicates but different editions/versions.

1. Click the **CATALOG** button on the **Navigator Toolbar**.
2. Click the **Compare 2 Items** button on the flow chart to open the **Compare which two records?** dialog box.
3. Enter the item ID/barcode numbers of the item records that you want to compare in the **Item 1** and **Item 2** fields.

**Note:** If you do not know the correct item ID/barcode number, click the corresponding **Lookup...** button to use the **Catalog Lookup** feature to find it. See the “Catalog Lookup” section earlier in this chapter for more information.

4. After you specify both item ID/barcode numbers, click **OK**. The **Comparing** dialog box opens.

## Merging

Once you have the **Comparing** dialog box open, you can evaluate the information in the records. You can also modify the information in either one or both records and merge (or copy) information from one record to the other.

- The text in the dialog box is color-coded as follows, so that you can quickly see any differences:
  - **Red text** represents differences between the records.
  - **Black text** represents fields that contain the same information.
  - **Blue text** represents merged information.
- The following **Merge** commands are available on the **Comparing** dialog box:
  - **Merge >>** – Copy the selected field information from the record on the left to the record on the right. You must select the row that you want to merge before using this command.
  - **Merge All >>** – Copy all of the data from the record on the left to the record on the right. Both records will be identical.
  - **<< Merge** – Copy the selected field information from the record on the right to the record on the left. You must select the row that you want to merge before using this command.
  - **<< Merge All** – Copy all of the data from the record on the right to the record on the left. Both records will be identical.
- You can edit the information in any field of either record. There are two types of fields that you can edit in the grid:
  - **Text boxes** – Double-click to place your cursor in the field that you want to edit and begin typing; use the **Delete** key to remove text.
  - **Drop-down boxes** – If you double-click a field and a drop-down button displays, click the drop-down button and click again to choose another option from the list. Since there is a limited set of item classes, all of these fields (**Circulation Type**, **Material Type**, etc.) use drop-down lists.
- There is a **Save** check box below each column. When you make a change to a record, its corresponding **Save** check box is automatically selected. Then, when you click the **Save** button, your changes are recorded. If you made changes to both records, but you only want to save one, clear the appropriate check box before saving.
- To close the **Comparing** dialog box without saving your changes, click **Cancel**.

The following example compares an item record recently imported from eZcat to an older record in the Concourse database. They are two editions of the same title.

- The **Age Group** does not match for both records but should be the same since the records are for the same title. You would click **Merge >>** to use **Juvenile** or **<< Merge** to use **Adult**.
- The **Copyright** dates are for **c2000** and **c2008**, but since these editions were not published in the same year, the difference is intentional.
- There is a **Cost** defined in the second record but not in the first. You could click **<< Merge** to copy **\$ 26.99** into the first record

	00016650	00016651
Age Group	Juvenile	Adult
Artist		
Author Ana	Bloom, Harold.	Bloom, Harold.
Author's Fir		
Author's La		
Call Number	823.912	823.912
Call Number	JRR	JRR
Call Number		
Call Number		
Call Number		
Circulation	Circulation	Circulation
Comment		
Copyright	c2000	c2008
Cost	\$ 0.00	\$ 26.99
Dimensions	25 cm.	25 cm.
Documents		

Save    Merge >>    Merge All >>    << Merge All    << Merge    Save   
   

if they cost the same amount, or you could click to insert your cursor in the first record and manually enter a cost.

The image to the right shows the **Age Group** merged right and the **Cost** merged left; the **Save** check boxes on both sides of the dialog box were automatically checked when changes were made to the records.

	00016650	00016651
Age Group	Juvenile	Juvenile
Artist		
Author Ana	Bloom, Harold.	Bloom, Harold.
Author's Fir		
Author's La		
Call Number	823.912	823.912
Call Number	JRR	JRR
Call Number		
Call Number		
Call Number		
Circulation	Circulation	Circulation
Comment		
Copyright	c2000	c2008
Cost	\$ 26.99	\$ 26.99
Dimensions	25 cm.	25 cm.
Documents		

Save    Merge >>    Merge All >>    << Merge All    << Merge    Save

---

## Importing and Exporting MARC Records

You can catalog in Concourse by entering an item's bibliographic information or by importing MARC records from eZcat/eZcat Pro or vendor disks. In addition, you can export your catalog records for use in other applications.

**Note:** To import MARC records, you must either have an **IMPORT** license, Level 4 Concourse, or Concourse Pro. To export MARC records, you must have either Level 4 Concourse or Concourse Pro.

### Importing with eZcat

Book Systems provides eZcat so that librarians with Internet access can locate and download MARC records quickly, easily, and free of charge. This product works with any automation system that imports MARC records and is appropriate for all types of libraries (public, academic, or religious).



You can search by author, title, subject, ISBN, LCCN, etc. Then eZcat connects to a Z39.50 database (or multiple databases simultaneously) via the Internet to find matches. For example, you can download MARC records from the Library of Congress, university libraries, large public libraries, and more; millions of quality records for cataloging books, videos, audios, software, and other materials are available.

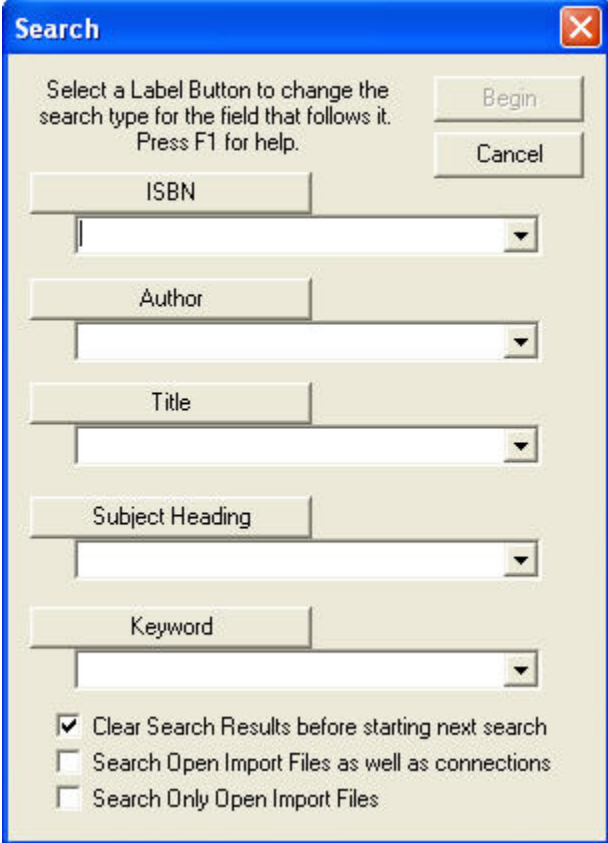
- If you have eZcat but it is not yet installed, insert your Book Systems CD and install the product now. To ensure that the two products will interact, restart Concourse after the eZcat installation.
- If you do not have eZcat and would like additional information about the product, please see the Book Systems Web site at [www.booksys.com](http://www.booksys.com) or contact [sales@booksys.com](mailto:sales@booksys.com).

### To import MARC records from eZcat

1. Click the **CATALOG** button on the **Navigator Toolbar**.
2. Click the **eZcat** button on the flow chart to launch the eZcat program. When the eZcat window initially opens, the Library of Congress address (Voyager@z3950.loc.gov:7090) displays in the left pane. When you begin a search, the status of your search and all search results are listed in this pane. You can add other library addresses to this list as needed. Consult the eZcat Help files for more information about adding or changing library connections.

**Note:** If you have saved a **Concourse.ezc** file, a pre-configured list of library databases connect automatically when you launch eZcat. Once you have established at least one connection, denoted by a green dot in the connections list, you can search for an item.

3. Click the **Search** button  in the eZcat toolbar, or click **Search** from eZcat's menu bar and then choose a search option. The **Search** dialog box opens.
  4. Enter search criteria in one or more of the search fields.
  5. Click **Begin**. As eZcat searches, it places symbols beside the library addresses and begins to list titles of matches in the left pane. All matching records display in the left pane under the appropriate library connection.
  6. In the left pane, click an item you want to import and review the MARC record in the right pane.
  7. Click the **Add to Concourse** button  on eZcat's toolbar or click **MARC | Export/Add | Add to Concourse** from eZcat's menu bar to import the record. The eZcat window stays open, and the Concourse taskbar button blinks to let you know the record has been copied into Concourse.
  8. Click the Concourse button on your taskbar to see the record in your **Add/Modify Items** dialog box. The title bar reads **Editing Item Title**.
- Note:** If a record for the same or a similar title already exists in your database, a message dialog box opens asking if you want to view a list of similar titles.
- If you want to compare and/or merge the imported record with an existing record, click **Yes** to open the **Select from Search Results** dialog box. From there, you can click the **Compare** button at the bottom to compare, edit, and/or merge the records. See the "Compare Two Item Records" section earlier in this chapter for more information.
  - If you want to import the record without comparing it to an existing record, click **No**.
9. Make any necessary changes to the record.
  10. When you are finished, click the **Save Changes** button on the cataloging toolbar. Concourse records the information and resets the **Add/Modify Items** dialog box for another import. The title bar now reads **Creating New Item ItemID**.
  11. You can click the eZcat taskbar button to return to that program, and then repeat steps 2 through 8 to catalog additional items as needed.



## Saving a connections list in eZcat

You can connect to other library databases to search for MARC records as needed. Click **Connections | New Connection...** from eZcat's menu bar to open the **Connect to:** dialog box where you can enter the appropriate information or click **Lookup** to search for a database and automatically populate the applicable fields. Refer to the eZcat Help file for more information.

Once you have configured connections to databases that work well for your library, you are able to store a connections list. For instance, if you want to store the Access Pennsylvania address (205.247.101.11, port 210, database INNOPAC) so you do not have to type it again, click **File | Save As...** from eZcat's menu bar. When the **Save As** dialog box opens, click **Concourse.ezc** to make this address a default. You can save it as another file as well by choosing an **.ezc** file to overwrite or creating a new file.

## Importing from a Vendor Disk

You can use eZcat to import MARC records easily, but if you receive MARC records on disks from your vendors along with new shipments, Concourse allows you to simply import these records as well.

### To import from a file

1. Insert your vendor disk into your disk drive.
2. Click the **CATALOG** button on the **Navigator Toolbar**.
3. Click the **Add/Modify Items** button on the flow chart to open the **Add/Modify Items** dialog box. **Creating New Item ItemID** displays in the title bar.
4. Click the **Import MARC Records** button on the cataloging toolbar.  
**Note:** You can also begin the import by clicking the **MARC Records** button on the **CATALOG** flow chart and then clicking **Single Step Import MARC Records** from the shortcut menu.
5. A message dialog box displays, reminding you that you can click the **Import MARC Records** button again to save your current spot and continue importing records later. Click **OK** to dismiss this dialog box, and the **Open** dialog box displays.
6. Click the **Look in:** drop-down button, and click again to select the location that contains your import file.
7. Find the file name, for instance **microlif.001**, and click to highlight it.
8. Click **Open**. A message dialog box opens, asking if you want to use today's date as the **Entry Date** for the imported records.
9. Click **Yes** to use the current date. If you want to use a different date, click **No**, but remember to add an **Entry Date** to each imported record. The first item from the import file displays in the **Add/Modify Items** dialog box.

10. If a record for the same or similar title already exists in your database, a message dialog box opens asking if you want to view a list of similar titles.
  - If you want to compare and/or merge the imported record with an existing record, click **Yes** to open the **Select from Search Results** dialog box. From there, you can click the **Compare** button at the bottom to compare, edit, and/ or merge the records. See the “Compare Two Item Records” section earlier in this chapter for more information.
  - If you want to import the record without comparing it to an existing record, click **No**.
11. If necessary, you may add to or modify the current information.
12. Click the **Save Changes** button on the cataloging toolbar. Concourse loads the next record in the import file in the dialog box.
13. Repeat steps 10-12 until you reach the end of the import file. When you reach the end of a import file, a message dialog box displays, that says:

### End of MARC Record Import

14. Click **OK** to close the message dialog box.

## Batch Importing

Concourse allows you to import MARC records in batches and manually define your import.

1. Click the **CATALOG** button on the **Navigator Toolbar**.
2. Click the **MARC Records** button on the flow chart to open a shortcut menu.
3. Click **Batch Import MARC Records...** to open the **Import MARC 21 Records** dialog box.
4. Specify the import parameters:

- **Replace Existing Records** – Click to select this check box if you want to overwrite items in your database with records that have matching item IDs. Otherwise, items from the import file with duplicate IDs are rejected.
- **Assign Next Available ItemID If Missing** – Click to deselect this check box if you do not want to automatically assign the next available item ID number to a record with no ID; MARC records imported with no ID number in the **852** field are rejected, and the import is aborted. This check box is selected by default.

- **Put Today's Date in 'Entry Date' Field** – Click to select this check box if you want to use the current date as the entry date for the imported items. If the check box is not selected, the entry date is left blank.
  - **Honor Delete Records** – Click to select this check box to remove records from your database by importing MARC delete records. If a MARC delete record is imported, Concourse will honor this deleted record and remove it from your database.
  - **Assign Next Available ItemID If Current One Already Exists** – Click to select this check box to assign the next available item ID even if the imported record has one that currently exists in your database; this ensures that your IDs stay in sequence.
  - **Skip First X Records** – Enter a number to skip a specified group of records at the beginning of the import file. Use this feature if you already know that these records are in the system. For example, if you began importing records from the file and there is an error on record 500, when you return to complete the import, you would enter **500** in this field to skip those records that you already imported.
  - **Import File Name:** By default, this is **A:\Microlif.001**. If the file from which you are importing has a different name or is on a different drive, enter the drive and file name in this field, or click **Browse...** to open a dialog box where you can locate it.
5. After you have completed the configuration of the batch import parameters, click **Begin Import**. Concourse first scans the record for the five item classes (**Age Group, Circ Types, Locations, Material Types, and Report Classes**). If the item classes are not found or if the item classes found are not defined in your database, Concourse looks for a Call Number. If the Call Number for the record is associated with any item classes, those item classes are used; otherwise, the **Select Appropriate Item Class** dialog box displays for each missing item class. See the “Understanding Call Number Associations” section below for more information.
  6. Click the item class to associate with the record and click **OK** to continue the import. Each time you make a selection from the **Select Appropriate Item Class** dialog box, Concourse adds the information to a list of Call Numbers with associated item classes. If you frequently use the batch import feature, your association list will become large, making the entire process more automated.
  7. Repeat step 6 until all item classes are defined for the import.
 

**Note:** If any errors occur during the import process, please call your Book Systems Technical Support Specialist for assistance.
  8. When the file is completely imported, the **MARC Record Import List** opens. It displays all of the records that were successfully imported from the file. The **Import Status** information for the batch displays in the **Import MARC 21 Records** dialog box that continues to display above the import list.

## Understanding Call Number Associations

Every time you import MARC records, you teach Concourse how to associate Call Numbers with your item classes. You do this by making selections in the **Select Appropriate Item Class** dialog box.

When you are viewing the **Select Appropriate Item Class** dialog box, the first field of the Call Number displays on the right side. If this does not give you sufficient information to choose the item class association, scroll down to the bottom of the item class list to see the other components of the Call Number. The components of the Call Number should be sufficient to help you select the appropriate item classes.

**Note:** You are only given the hundreds range in which the Call Number falls (e.g., you would see **500** for 596.3).

## Exporting

You can export MARC records from your Concourse database to another database.

**Note:** This feature is only available if you have a Level 4 Concourse license or Concourse Pro.

1. Click the **CATALOG** button on the **Navigator Toolbar**.
2. Click the **MARC Records** button on the flow chart to open a shortcut menu.
3. Click **Export MARC Records...** to open the **Export MARC Records** dialog box.
4. Under **Select Records**, click the appropriate option:
  - **All Records** – Export all of the MARC records in your database.
  - **Use Filter** – Enter specific criteria in the **Build Filter** dialog box so that only certain MARC records from your database are exported. See the “Filtering” section in **Chapter 2** for more information.
5. In the **Export to File:** field, enter the file path where you want to export your records; otherwise, click the **Browse...** button to access the **Open** dialog box, find a location and specify a file name, and then click **Open**.
6. If you want to remove certain MARC fields from the records as you export them, click the **Clean on Export:** check box, and then click **Cleaning Prefs** to open the **Cleaning Preferences** dialog box.
  - Read the information on the dialog box about wildcards. This allows you to easily remove a range of MARC tags from your export records.
  - Notice the MARC tags in the **Clean** list by default. Review these tags and decide if you actually want to remove this information.
  - If there is a tag in the list that you do *not* want removed from the export records, click to highlight the tag number and then click the **Remove ->** button.
  - If you want to remove additional tags that do not display in the **Clean** list, enter the tag number in the edit field in the middle dialog box (near the top) and then click the **<- Add** button.

- If you want to preserve certain tags, you can enter those in the edit field and click the **Add ->** button. This will add the tag to the **Preserve** list.  
**Note:** You can preserve individual tags that might display within a range of tags specified for cleaning. For example, if you have a Call Number tag in the 096 field that you want to keep, but you want to clear the records of the other 09X tags, then specify 09X in the **Clean** list and 096 in the **Preserve** list.
- When you are satisfied with both lists, click **OK** to save your cleaning preferences and return to the **Export MARC Records** dialog box; otherwise, click **Cancel** to return to the dialog box without saving your changes.

7. If necessary, modify the default **Description:** and **Location:** information.
8. Use the **Note:** field to enter any additional information about the records you are exporting that may help you identify the file.
9. Click **OK** to begin the export; otherwise, click **Exit** to close the dialog box without exporting.

**Note:** If you selected **Use Filter**, specify the filter criteria on the **Build Filter** dialog box and then click **OK**.

10. The MARC export begins.

**Note:** The amount of time it takes to export MARC records depends on the number of records involved; this process may take some time. A running count of the number of records exported displays just below the **Export To Drive** field.

11. If you are exporting to a location that already has an export file with the same name, you will get a warning message asking if you want to overwrite the existing file. Click **Yes** to overwrite the existing file, or click **No** to specify a different name for the export file.
12. If you are exporting to a disk and run out of space, the export process is suspended and a warning dialog box displays. Insert a new disk and click **OK** to continue.
13. If you want to stop the export before it finishes, press and hold the **Esc** key.
14. When the export process is complete, a confirmation dialog box displays, stating:

**X Records have been exported from a total of Y records.  
Z Records were skipped.**

**Note:** Unless there was a problem, **X** should be equal to **Y** and **Z** should be **0**.

15. Click **OK** to dismiss the confirmation message, and then click **Close ESC** to close the export dialog box.

## Chapter 6: Circulation

Concourse provides you with various circulation functions that can be accessed from the **CIRCULATION** flow chart on the **Concourse Navigator**. This explains how to check items in and out, reserve items that are not available, handle fines, and more.

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### Circulation Desk Dialog Box

Once you have created item and patron classes, you can identify and track your collection. You are now ready to begin item circulation.

Before you can check out an item to a patron, you must click the **CHECKOUT** button on the **Navigator Toolbar** to open the **Circulation Desk** dialog box.

**Note:** If you have a receipt printer license and have not yet properly configured **Receipt Setup**, the **Receipt Printer Setup** dialog box opens each time you open the check in/out dialog boxes. If this happens, set up the receipt printer by choosing a COM port and then select **OK** to proceed.

Use the **Circulation Desk** dialog box to check out items to specific patrons, to reserve items, to review fines, and to handle fine activities.

The screenshot shows the 'Circulation Desk' dialog box. It contains the following information:


- Patron:** 00000059, **Patron Name:** Richards, Felicia, **Address:** 345 Main Street, Huntsville, AL 55555, **Phone:** H: 256/555-5555, **Work:** W:
- Buttons:** Checkout/Renew, Review Patron, Reserve, Fine Activities, Print..., Next Patron ESC, Msgs..., Pay...
- Item:** [Empty field], **Class:** Adult, **Out:** 3, **Owed:** 1.00, **Special Due Date:**
- Table:**

	Barcode	Call Number	Title	
1	00016611	222.4092 Moo	1 - RESERVED: A heart like his : intimate refl	08/A
2	00016588	E Chr	FINE: The Chronicles of Harnia	07/A
3	00016595	230.3 Lew	The Joyful Christian : 127 readings from C.S	07/A
4	00016638	242 Pip	A Godward Life : savoring the supremacy o	08/A
5	00016647	Fai	Faith Like Potatoes DVD	08/A

When you enter items into the **Item** field and then click **Checkout/Renew**, Concourse creates a check out list. Items in this list display in **black** text; when you click the **Review Patron** button to see the patron's status, the items in the list are color-coded:

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

You can perform all or some of the following actions from the **Circulation Desk** dialog box:

- After scanning or entering the ID/barcode number of the item, click **Checkout/Renew** to add it to the list of checked out items.
- When all items are scanned or entered, click **New Patron** or press **ESC** to clear the dialog box.
- Right-click on any item record in the grid to access a shortcut menu that contains options to edit item or patron records, pay fines, cancel reserves, review item or patron messages, and more.
- Click **Help** or press **F1** for more information about the check out process.
- Notice that the **Ctrl + Click** feature is available from this dialog box when your cursor is placed over an item in the list. This function provides a convenient way for you to review and modify records in the **Add/Modify Items** dialog box. See the "Control + Click" section in **Chapter 2** for more information.
- Modify the row and column dimensions in the grid or even change which columns display. See the "Using and Customizing Grids" section in **Chapter 2** for details.
- To close the dialog box, click  in its upper-right corner.

### Loading the patron record

From the **Circulation Desk** dialog box, load the patron record in one of the following ways:

- Scan or enter the patron ID/barcode number in the **Patron** field.
- Enter the patron P-Link number in the **Patron Name** field, if applicable.
- Enter the patron's name in the **Patron Name** field in **LastName, FirstName** format.

**Note:** If you do not know the patron's first name, you can just enter his or her last name. If you do not know the patron's last name, enter his or her first name preceded by a comma.

- Search for the patron by clicking the **Lookup Patron...** button to open the **Patron Lookup** dialog box. See the “Patron Lookup” section in **Chapter 4** for more information.

## Check Out Routine

1. Open the **Circulation Desk** and load the patron record using one of the options described in the previous section.
 

**Note:** If the specified patron has requested that an item be put on reserve and that item is now available, a message dialog box displays reminding you to check the reserve shelf for the item. If any alert messages are posted on the patron record, these also display in a message dialog box.
2. To review items currently checked out to this patron as well as any outstanding fines or reserves, click **Review Patron**.
3. If you want to choose a different due date than the normal circulation period for the item being checked out, click the **Special Due Date** check box.
4. Scan or enter the item ID/barcode in the **Item** field.
5. If you *typed* the item ID/barcode number, you must either click the **Checkout/Renew** button or press **Enter** to continue. If you *scanned* the barcode, you do not have to click a button or press a key.
6. If you selected the **Special Due Date** check box, a date-selection dialog box opens so you can specify the special due date (see the “Entering Dates” section in **Chapter 2**). Click **OK**. The item is added to the list of items checked out.
 

**Note:** Once you have reviewed a patron or checked out an item to a patron, his or her items display in the grid at the bottom of the dialog box. You can right-click on any item in the grid to access a shortcut menu with options to edit the item or patron record, pay fines, cancel reserves, review item or patron messages, and more.
7. To move to the next patron, click **Next Patron ESC**.
8. To close the dialog box, press **Esc** to clear the current patron record and then either click **Close** or press **Esc** again.

## Renewing Materials

If a patron has multiple items checked out and wants to renew all of them at the same time, you can perform that function with a single command. This feature recalculates all due dates according to the patron’s class and circulation privileges.

1. Open the **Circulation Desk** and load the patron record. See the “Loading the patron record” section earlier in this chapter for more information.
2. When the patron information displays in the dialog box, click **Review Patron**. A history of the patron’s transactions displays in the bottom grid.
 

**Note:** Not all workers may have access to the **Review Patron** button; see the “Worker Record Permissions” section in **Chapter 3** for details.
3. If you want to manually specify a due date for the item to be returned after it is renewed, click the **Special Due Date** check box.
4. In the **Item** field, enter the ID/barcode number of the item to be renewed, or if the

patron wants to renew all of the materials that he or she currently has checked out, enter **RENEWALL** (one word) in this field.

5. Click **Checkout/Renew**.
6. If you selected the **Special Due Date** check box, a date-selection dialog box opens so you can specify the special due date (see the “Entering Dates” section in **Chapter 2**). Click **OK**.
7. If the items being renewed are overdue or if the patron is restricted from checking out or renewing for other reasons, a dialog box opens, asking if you want to continue anyway.
8. If you have the *Renew Overrides* worker permission enabled, you can click **Yes** to renew the item anyway. If you do not have this permission, Concourse will allow another worker who does have this privilege to enter his or her login and password to complete the override. Click **No** to honor the restriction and abort the renewal(s). If there were no restrictions or if the restrictions were overridden, Concourse displays the new item(s) and the new due date(s) in the grid.

## Reserving Items

Sometimes a patron may need an item that is currently checked out to another patron. A patron may also want to reserve a new release before it arrives at the library. The **Reserve Items** feature allows these types of items to be held for patrons that request them.

1. Open the **Circulation Desk** and load the patron record. See the “Loading the patron record” section earlier in this chapter for more information.
2. When the patron’s information displays in the dialog box, enter the ID/barcode number of the item to be reserved in the **Item** field.
3. Click **Reserve**.
4. If the item is currently available, a message dialog box opens stating that the item is on the shelf. Click **Yes** to reserve the item anyway.
5. The reserved item is added to the grid, color-coded **blue**.

## Reserve E-mail Notification

Concourse allows you to notify your patrons via e-mail when a reserved item becomes available. When you check in a reserved item, the **This Item Is Reserved!** dialog box opens. Simply click the **E-mail Patron that this item is available?** check box near the bottom, and click **OK** to send an e-mail message to the patron who has the item reserved.

**Important!** If you have not already configured e-mail settings, click the **E-Mail Settings** button to open a dialog box where you can enter server information and more for the sender e-mail.

## Canceling a Reserve

1. Open the **Circulation Desk** and load the patron record. See “Loading the patron record” earlier in this chapter for more information.
2. Click **Review Patron**. A history of the patron’s transactions displays in the bottom grid. Any items the patron has reserved are displayed in **blue**.
3. Right-click the appropriate item and click **Unreserve** from the shortcut menu. A confirmation dialog box displays.
4. Click **Yes** to proceed, or click **No** to cancel. If you click **Yes**, a dialog box opens, informing you that the item is no longer on reserve.

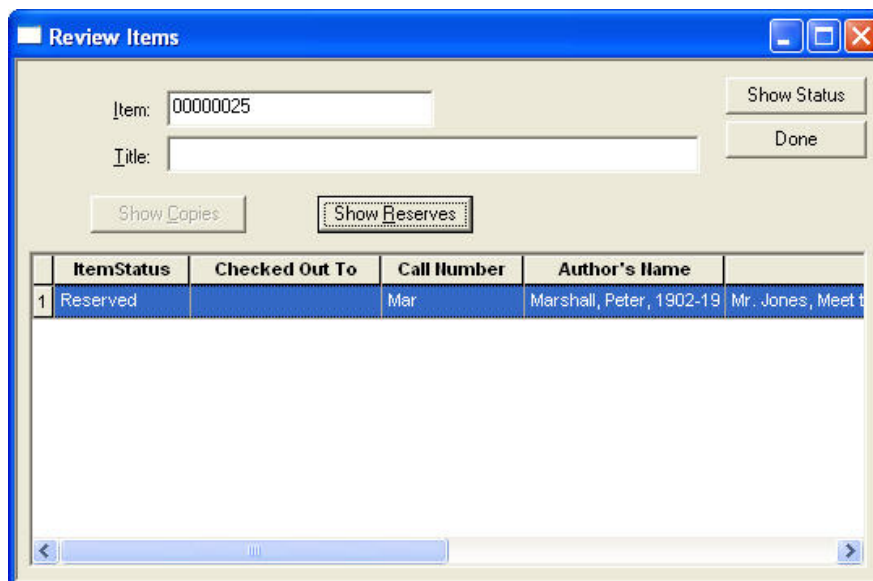
**Note:** If the item has already been placed on the reserve shelf, do not forget to remove it so that it can be re-shelved.

5. Click **OK** to close the message dialog box.

## Canceling Reserved Items Using the Reserve List

When you scan or enter an item ID/barcode number in the **Review Items** dialog box, the **Show Reserves** button is enabled if the item is on reserve. Click this button to access the **Reserves List** for the item to see the patron ID/barcode and name of all patrons who currently have the item on reserve.

1. Click the **CIRCULATION** button on the **Navigator Toolbar**.
2. Click the **Review Item(s)** button on the flow chart. The **Review Items** dialog box opens.



The screenshot shows the 'Review Items' dialog box. It has a title bar with standard window controls. Below the title bar, there are two input fields: 'Item:' with the value '00000025' and 'Title:'. To the right of these fields are two buttons: 'Show Status' and 'Done'. Below the input fields are two buttons: 'Show Copies' and 'Show Reserves'. The 'Show Reserves' button is highlighted with a dashed border. Below the buttons is a table with the following data:

	ItemStatus	Checked Out To	Call Number	Author's Name	
1	Reserved		Mar	Marshall, Peter, 1902-19	Mr. Jones, Meet t

At the bottom of the dialog box, there is a horizontal scrollbar.

3. Either scan or enter in the item ID/barcode number in the **Item:** field, or enter the title (in whole or in part) in the **Title:** field.
4. Click **Show Status** to load the matching item(s).
5. If there is more than one item in the list, click to select the appropriate item.
6. If enabled, click **Show Reserves**. The **Reserve List** dialog box opens.
7. Click to select the patron you want to remove from the **Reserve List**.

8. Click **Remove**. A message dialog box displays, stating that the patron has been removed from the item's reserve list.
9. Click **OK** to continue.
 

**Note:** If there are no other reserves for this item, do not forget to remove it from your reserve area so that it can be re-shelved.
10. To save your changes, click **Done**, or you can click **Cancel** to abort the change.
 

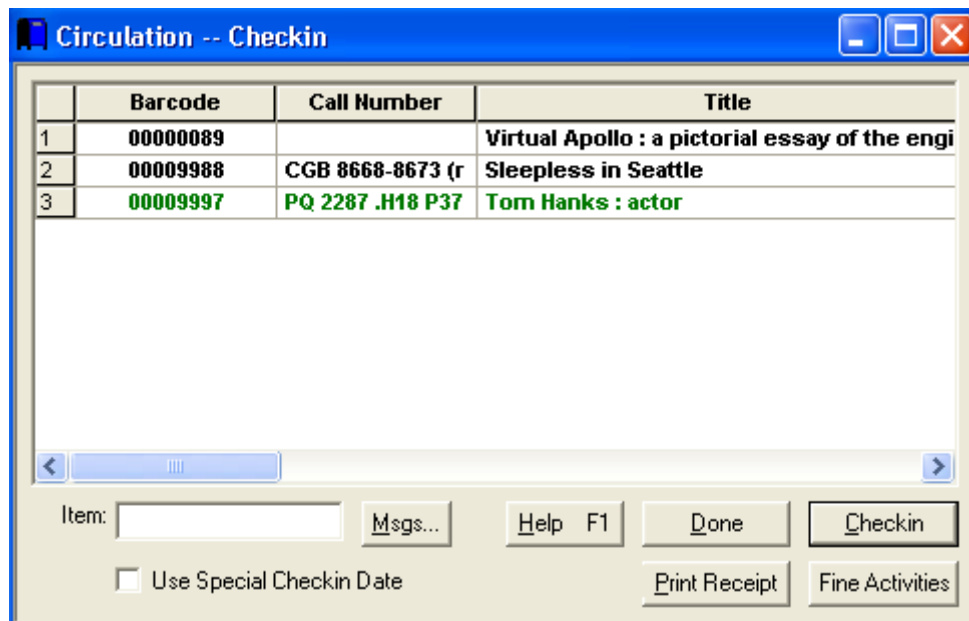
**Note:** If you selected cancel, a message dialog box displays, stating that the change to the **Reserve List** has been canceled. To close the dialog box, click **OK**.
11. The **Reserve List** dialog box closes.
12. To close the **Review Item(s)** dialog box, click **Done**.

---

## Circulation--Checkin Dialog Box

Use the **Circulation -- Checkin** dialog box to record the items that have been returned to your library. You can configure the columns and fields of this dialog box by dragging and dropping the vertical bars in the column headers or right-clicking the column headers to open the **Choose fields for display** dialog box. See the "Using and Customizing Grids" section in **Chapter 2** for more details.

Click the **CHECKIN** button on the **Concourse Navigator** to open this dialog box.



**Note:** The **Circulation -- Checkin** dialog box has the same color-coding as the **Circulation Desk** dialog box; see the "Circulation Desk" section earlier in this chapter for more information.

## Check in Routine

1. Open the **Circulation -- Checkin** dialog box.
2. If you want to enter a special check in date for the item, click the **Use Special Checkin Date** check box.
3. Scan or enter the item ID/barcode number in the **Item:** field.
4. If you *typed* the item ID/barcode number, you must either click the **Checkin** button or press **Enter** to continue. If you *scanned* the barcode, you do not have to click a button or press a key.
5. If you selected the **Use Special Checkin Date** check box, a date-selection dialog box opens so you can specify the date( see the “Entering Dates” section in **Chapter 2**). Click **OK**.

**Note:** If another patron placed the item on reserve, a message dialog box displays reminding you to hold the item. Click **OK** to continue.

6. The item is added to the check in list.

**Note:** Once an item record is added to the check in list, you can right-click it to access a shortcut menu. This menu allows you to edit item or patron records, pay fines on items, cancel reserves, review item or patron messages, send a patron to the check out dialog, and more.

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## Fines

Concourse gives you the ability to estimate, assess, waive, and collect fines. You can perform these tasks using the **Fine Activities** button located on the **Circulation Desk** and **Circulation -- Checkin** dialog boxes. When you click this button, a shortcut menu opens with the following options: **Assess Fine...**, **Pay Fines...**, and **Estimate Fines...**

**Note:** A worker must have the correct worker permissions enabled to perform various fine activities; see the “Worker Record Permissions” section in **Chapter 3** for details.

### Manually Assessing a Fine

Concourse automatically assesses overdue fines based on the loan periods and fine accrual information set up on the **Edit Patron Class** dialog box, but you may also assess fines manually. For instance, if a patron checks in a book without a cover, you might want to assess a fine that includes the book’s replacement or rebinding cost.

1. When you initially open the **Circulation Desk** or **Circulation—Checkin** dialog boxes, fine options are unavailable. Activate/enable these functions in one of the following ways:
  - Open the **Circulation Desk** dialog box and load the patron record. See the “Loading the patron record” section earlier in this chapter for more information. If you are assessing a fine for an item currently checked out to the patron, you can click **Review Patron** and click to select the item from the grid.

- Open the **Circulation -- Checkin** dialog box, check in an item, and then click the item in the grid.
2. Click the **Fine Activities** button and then click **Assess Fine...** from the shortcut menu. The **Assess Fine** dialog box opens. The patron's ID number is already supplied in the last field. If you are on the **Circulation -- Checkin** dialog box, the item ID/barcode number of the most recent item checked in also displays.
  3. If needed, enter the ID/barcode number for the item in the **Item:** field. If you do not know this number, you can search for it by clicking the **Lookup** button. See the "Catalog Lookup" section in **Chapter 4** for more information.
  4. If you are assessing a fine because the item was lost, click the **Mark Lost** check box. When you select this option, the actual cost of the item from the item record displays in the **Amount to Assess** field.
  5. If needed, enter the dollar amount of the fine in the **Amount to Assess** field. If you are not sure 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.
  6. Click **Assess**.
  7. If you clicked the **Mark Lost** check box, a confirmation dialog box displays reminding you that the item will be checked in and then marked as lost. Click **Yes** to proceed.
  8. If the item is not currently checked out to the patron, a warning message displays. If you really want to assess the fine to this patron, click **Yes**. The item record displays in **green** at the top of the check out grid, indicating that a fine was assessed.

## Estimating 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 and the item is not available for renewal, you can estimate the overdue fines for the patron as follows:

**Important!** Fine accrual information must be set up on the **Edit Patron Class** dialog box for Concourse to calculate estimated fines.

1. Open the **Circulation Desk** and load the patron record. See the "Loading the patron record" section earlier in this chapter for more information.
2. Click **Fine Activities** and then click **Estimate Fines...** from the shortcut menu. The **Estimate Fine** dialog box opens. The patron number automatically displays in the **Patron Barcode** field, and the number of the item at the top of the check out list displays in the **Item Barcode** field.
3. If needed, you can change either barcode or click the corresponding **Lookup...** button to find a different record.

**Note:** You *must* select an item that is checked out to the patron; otherwise, the estimated fine will be **\$0.00**.

4. If you are estimating fines for all items that the patron has out, leave the **Item Barcode** field blank and click the **All Items Out** check box.
5. If you want to see the current fine for this patron and item, click the **Current** button and note the updated amount in the **Current Fine** field.
6. If you want to estimate fines for a past or future date, click the **Estimate...** button. The **Select a Date** dialog box opens.
7. Specify the date through which you want to estimate fines. See “Entering Dates” in **Chapter 2** for more information.
8. Click **OK** and then note the updated amount in the **Estimated Fine** field.
9. When you are finished, click **Done** to close the dialog box.

## Pay Fines

Items that display in **green** in the item list on the check in/out dialog boxes have attached fines. When a patron is paying a fine, you can open the **Pay Fine** dialog box in one of the following ways:

- From either the **Circulation Desk** or **Circulation -- Checkin** dialog box, click the **Fine Activities** button, and then click **Pay Fines...** on the shortcut menu.
- On the **Circulation Desk** dialog box, click the **Pay...** button.
- Right-click the item in the check in/out 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 owes fines for multiple items.

The **Pay Fine** dialog box opens, displaying one or more items on 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. Enter the amount being paid or waived in the **Amount to Pay or Waive:** field. Include the decimal.
2. Verify that the amount displaying in the field is correct.
3. Click the appropriate command button:
  - Click **Pay** if the amount that you entered is to be applied as a payment received.
  - Click **Waive** if the amount that you entered is to be waived.
4. The amount field is cleared and the appropriate adjustment is made to the balance in the **Amount Owed** field. If needed, you can enter another amount to pay or waive for this patron.

	Barcode	Title	Current Fine
1	0000997	FINE: Tom Hanks : actor	\$ 0.25
2	00010100	FINE: Geisha : out of tune	\$ 3.75
3	00010072	FINE: Autobiography of a Geisha	\$ 5.00

5. When you are finished, click **Close**.

---

## Messages

You can attach messages to item and patron records. If a message is attached to an item, its summary line in the check in/out grid has a yellow background. If the message is attached to a patron, the **Msgs...** button flashes when the patron record is accessed.

To be able to open a message from a variety of places, link the same message to both an item and a patron record. The message will then be available when you right-click either one. See the “Linking a Message to a Patron and an Item” section later in this chapter for more information.

Examples of appropriate item messages are **retire from circulation for repairs** and **additional copies expected**. Examples of appropriate patron messages are **reserved book in** and **lost three items last year**.

1. Open the **Messages** dialog box for a patron or item in one of the following ways:
  - On the **Circulation Desk** dialog box, load a patron record, and click the **Msgs...** button.
  - From the **Add/Modify Patrons** dialog box, load a patron record, and then click the **Messages** button on the patron toolbar.
  - From the **Add/Modify Items** dialog box, load an item record, and then click the **Messages** button on the cataloging toolbar.
  - After you check in an item on the **Circulation -- Checkin** dialog box, click to select the item in the list and then click the **Msgs...** button.

	Patron Barcode	Last Updated By	Message Date	Message Text
1		RUTH	7 /29/2011	Returned with back corner slightly frayed

Enter your Message here

Add New Delete Cancel Save

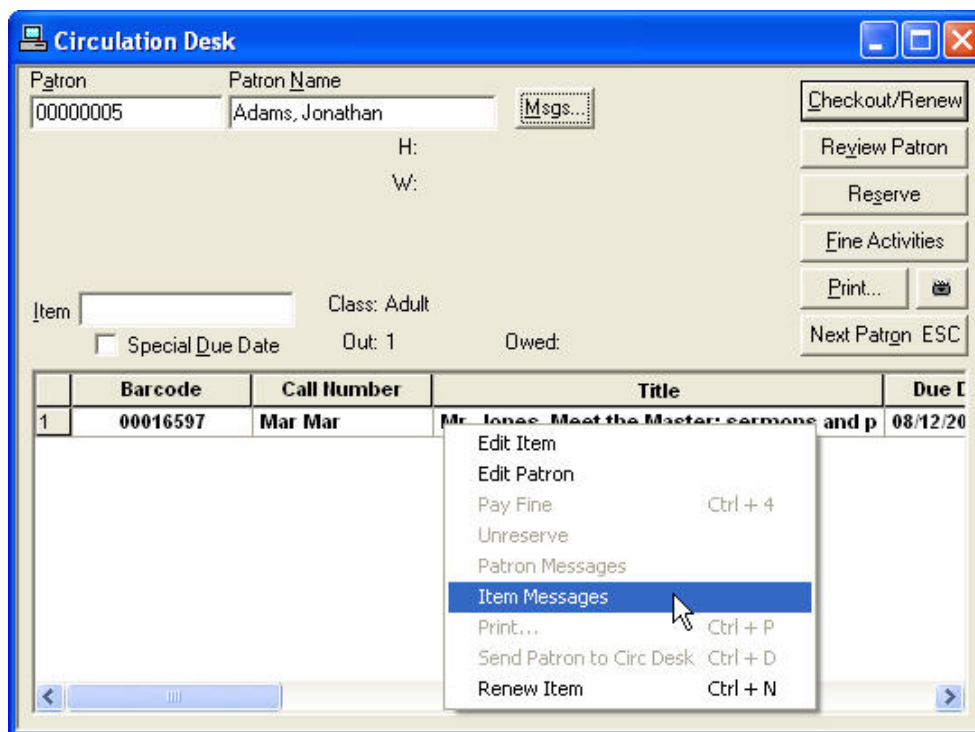
2. You can add a new message, edit an existing message, or delete a message (if you have the correct worker permissions enabled):
  - To add a new message, click **Add New**. A new line displays in the message dialog box; you can modify the default text in the same manner that you would edit an existing message.

- To edit an existing message, highlight the existing **Message Text**, and enter a new message.
  - To remove a message, click the row header (number to the left) to select the message that you want to delete, and then click the **Delete** button. A dialog box displays asking if you are sure you want to remove. Click **Yes** if you do; otherwise, click **No**.
  - If you would like to resize the columns in order to see the entire header, click the column divider of the column you would like to resize and drag it to the new position.
3. Click **Save** to keep your changes and close the dialog box, or click **Cancel** to exit the dialog box without saving.

**Note:** The following fields are automatically completed by Concourse when you save the message: **Patron Barcode** (in the case of linking patron and item messages), **Last Updated By**, and **Message Date**.

### Linking a Message to a Patron and an Item

1. Click the **CHECKOUT** button on the **Navigator Toolbar** to open the **Circulation Desk** dialog box.
2. Load the patron record and then check out an item to that patron.
3. In the grid below, right-click the item and click **Item Messages**.



4. The **Item Messages** dialog box opens.
5. Click **Add New**.
6. In the **Message Text** column, enter a message that pertains to both the item and the patron. For example, **Patron 00000005 damaged Item 00016597**.

7. Click **Save**. The item displays in the grid with a **yellow** background, and the **Msgs...** button for the patron begins to flash.

**Note:** Any changes made to the message will apply to both the patron and the item.

---

## Reviewing Item Circulation History

You can review the status of any item in your collection using the **Review Item** feature.

1. Click the **CIRCULATION** button on the **Navigator Toolbar**.
2. Click the **Review Item(s)** button on the flow chart to open the **Review Items** dialog box.
3. Enter the appropriate information in either the **Item** field or the **Title** field. The **Title** field is an index search; it looks for the specified word(s) in the title index, which is compiled from the **Title** and the following related information: **Series Title**, **Title Analytics**, **Parallel Title**, and **Uniform Title**.

**Note:** These two fields are mutually exclusive.

4. Click **Show Status**. The item's information is displayed in the bottom grid.
5. Concourse lists the following information by default:
  - **ItemStatus**
  - **Checked Out To**
  - **Call Number**
  - **Author's Name**
  - **Title**
  - **Cost**
  - **Copyright**
  - **Series Title**
  - **ISBN**
  - **Publisher**
6. If there are multiple copies of the item in the library, the **Show Copies** button is active. Click this button to open the **Copy List** dialog box, displaying the **Barcode** and **ItemStatus** of each copy. Click the **Close** button when you are finished.
7. If the item has been placed on reserve by one or more patrons, the **Show Reserves** is active. Click this button to open the **Reserve List** dialog box, displaying the name and barcode of the patron who reserved the item.
8. When you have completed your review, click **Done** to close the dialog box.

---

## In House Usage

Besides checking out items to patrons who will take them home, you can also track how items are used inside of your library. You can scan reference items left out on study tables that patrons are not able to check out or audio/video equipment used during a library event, such as story hour.

1. Click the *text* on the **CIRCULATION** button on the **Navigator Toolbar** to open a shortcut menu.
2. Click **Log In House Usage** to open the **Log In House Usage** dialog box.
3. Next, decide how you want to record these items. You have two options:
  - **Record each of the items as Used In House** - log these items as being used inside your library.
  - **Record each of the items against the user defined statistic** - log these items as fulfilling a user-defined statistic.
4. To queue items, you can scan or enter the barcode into the **Item Barcode** field. Click the **Enter ID** button to add the barcode to the field below. Rather than scanning the barcode and then clicking the enter button each time, you can elect to scan items with a handheld device, such as the M5000, and then download the barcodes to the **Log In House Usage** dialog box all at once.
5. If you need to download or import barcodes to queue items, click **Download...** to open the **Portabar** dialog box, and choose one of the following:
  - **Download scanned barcodes...** – You can scan barcodes with your Concourse-compatible handheld device and then download them to the **Log In House Usage** form.
  - **Download barcodes from PHD...** – Scan barcodes with your PHD reader and then download them to the **Log In House Usage** form.
  - **Import Barcodes from File...** – Upload any file with a list of barcodes.
6. Once you have entered the item barcodes, click **Log Statistics**. The dialog box closes and the data is stored.

You can view the statistics for your in-house usage by clicking the *text* on the **REPORTS** button on the **Navigator Toolbar**, and then clicking **Statistics | In House Usage**. An **In House Usage Statistics by Report Class** report opens, displaying the number of items in each class that were used in the library.

## Chapter 7: Searches

Concourse searches are designed to give you a broad range of functionality; therefore, they vary both in complexity and speed. Although each search type differs in the manner of obtaining results, all results are displayed in the **Search Results** dialog box, discussed in detail later in this chapter.

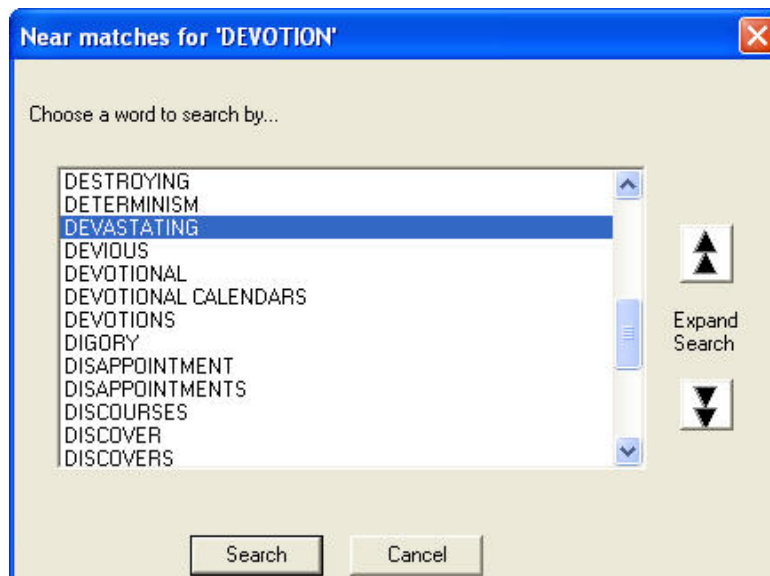
Concourse contains the following four searches: **Easy Word Search**, **Expert Search**, **Barcode Search**, and **Study Programs Search**. All of these searches are accessible by clicking the **LOOKUP** button on the **Navigator Toolbar** to open the flow chart.

---

### Near Matches

When you are performing an **Easy Word Search** or **Expert Search** that yields no results, Concourse asks if you would like to see a list of near matches. If you click **Yes**, the **Near matches for 'SEARCH TERM'** dialog box opens (pictured below). This dialog box displays a portion of the index that may contain some form of the search word that you entered or the correct word if it was spelled incorrectly. If you do not see an appropriate search word, you can use the **Expand Search** arrow buttons to scroll through the entire index of entries. In this example, the user searched for “devotion,” and although an exact match is not found, several related words, such as “devotional” and “devotions” are found.

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



---

## Easy Word Search

**Easy Word Search** is the simplest to use and yields the most results. It allows you to search more than one index simultaneously, and words do not have to be entered exactly as they are in the record. For example, if you were searching for *Devotions for a Deeper Life* and entered either **DEVOTIONS LIFE** or **DEEPER DEVOTIONS**, your search results list would include the correct record; in other words, the search term is a list of words, not a phrase.

This search feature returns only items that contain the word in its entirety, ignoring marks of punctuation. For example, a search for **CATS** returns only results containing the words **cats** or **cat's**; words that do not match the whole search term, such as **cat**, **communicate**, and **catastrophe** will not be found.

If you enter more than one word, Concourse returns only items that contain both words in at least one area of the record (e.g., Author, Title, etc.). For instance, if you are searching for the book *A Connecticut Yankee in King Arthur's Court* by Mark Twain, entering the words **TWAIN** and **YANKEE** will not yield successful results. Both words must display in the same place for **Easy Word Search** to access the appropriate record. A successful search for this item would be **YANKEE KING ARTHURS** (**ARTHUR** would *not* work because of the apostrophe s in the book title).

### Conducting the Search

1. Click the **LOOKUP** button on the **Navigator Toolbar**.
2. Click the **Easy Word Search** button on the flow chart to open the **Easy Word Search** dialog box.



3. In the **Enter Any Significant Word(s)** field, enter a search term; you can use wildcard characters. If applicable, you may also choose a previously entered search term from the drop-down list.

4. In the **Search for word(s) in** section, click to deselect any indexes that you do not want to search. By default, all five areas are selected. You can conduct a combination search that specifies author, title, subject, keyword, and/or donor areas of the item records. If you would like to search through all of the indexes listed, click the **Search All** button to re-select all the options.  
**Note:** For more specific details about what information is used to compile these indexes, see the “Indexes” section in **Chapter 11**.
5. Click **Search**. All records matching your search term are displayed in the **Search Results** dialog box.  
**Note:** If your search yields no results, Concourse asks you if you would like to see a list of near matches. Click **Yes** to browse through the index keywords.
6. When you are finished, close the **Search Results** dialog box, and then click **Done** on the **Easy Word Search** dialog box.

---

## Expert Search

An **Expert Search** allows you to create a more precise search than **Easy Word Search** by allowing you to create three different criteria and combine them with Boolean operators. You may choose the type of data you are searching, specify a search term, and choose the qualifier, which specifies exactly how search terms should be interpreted.

### Qualifiers

- **begins with** – The field in the matching record(s) must have a word or phrase that begins with the search term. For example, if you are searching for all materials in your collection by Michael Crichton but you are unsure of the spelling, you can search for **an author’s last name begins with CRI**.
- **contains word(s)** – The field in the matching record(s) must contain the search word(s). For example, if you are searching for materials about horses, you can search **keyword contains word(s) HORSE**.
- **ends with** – The field in the matching record(s) must have a word that ends with the search term. For example, if you are searching for materials by Harvey M. Deitel but are uncertain of the spelling, you can search for **an author’s last name ends with TEL**.

### Boolean Operators

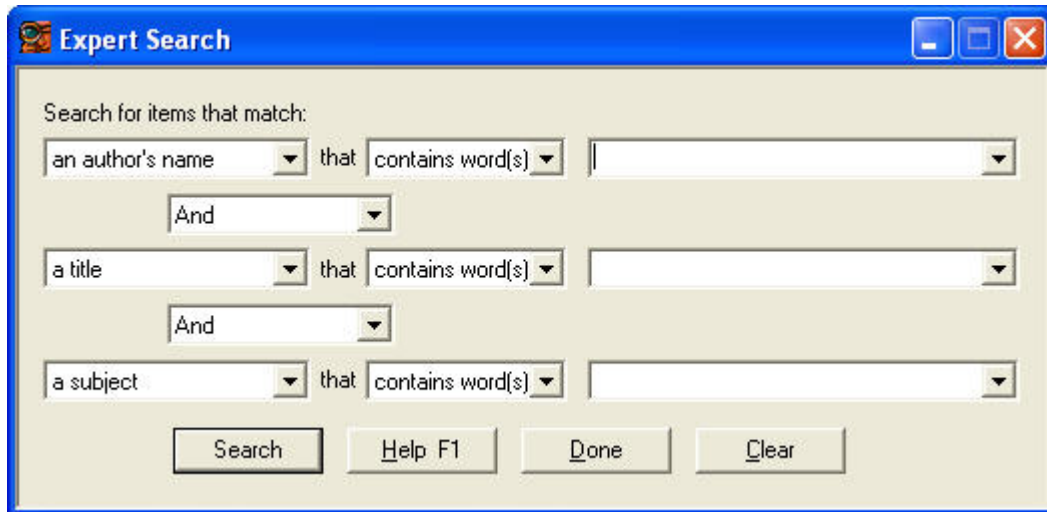
Boolean operators unite multiple criteria/filters. The operators **And**, **But Not** and **Or** define the relationship between terms when you are conducting various searches.

The **And** operator will limit the existing search results while the **Or** expands them. **AND** ensures that the database will be searched for records that satisfy *both* criteria; **OR** searches the database for records that satisfy either one of the criteria. On the other hand, **But Not** searches for a record that satisfies the first criterion while *eliminating* the second.

For example, if a patron is looking for books on computers and heard that the *Nutshell* series and the Harvey Deitel books are good resources but she is not interested in the *for Dummies* series, you could set up criteria to find the first two types of books but not the last type.

### Conducting the Search

1. Click the **LOOKUP** button on the **Navigator Toolbar**.
2. Click the **Expert Search** button on the flow chart to open the **Expert Search** dialog box.



3. Click the first drop-down button of the search line, and click again to select the data type for which you are searching:
  - **a call number** – searches for Call Number.
  - **a subject** – searches the subject headings.
  - **a title** - searches the titles, series title, title analytics, parallel title, and uniform title (the **Title** index).
  - **an author's first name** – searches by the author's first name only.
  - **an author's last name** – searches by the author's last name only.
  - **an author's name** – searches the author's full name; enter the name in **LastName, FirstName** format (the **Author** index).
  - **anything** – searches all of the following *indexes*: **Title, Author, KeyWords, Subject Headings, and Gift Notes**. This is equivalent to using the **Easy Word Search** dialog box with all of the check boxes selected.
  - **donor** – searches the donor, in memory of, and in honor of data (the **Gift Notes** index).
  - **keyword** – searches the subject headings, notes, summaries, subject and title analytics, and the parallel and uniform titles (the **KeyWords** index).

- **location** – searches the location information.

**Note:** For more information about the indexes used in searching, see the “Indexes” section in **Chapter 11**.

4. Click the second drop-down list in the search line, and click again to select a qualifier. For more information about qualifiers, see the “Qualifiers” section earlier in this chapter.

**Note:** If you are searching for an author’s name, remember that this field is formatted as **Last Name, First Name**. If you choose begins with, you must enter the last name. If you choose ends with, you must enter the first name.

5. In the last field in the search line, enter the term or value for which you are searching; you can use wildcard characters if needed. If applicable, you may also choose a previously entered search term from the drop-down list.
6. If you want to add an additional search line, link the search lines with a Boolean operator. For more information, see the “Boolean Operators” section earlier in this chapter.

- **And** - item(s) must match both the criteria above and the criteria below.
- **But Not** - item(s) must match the criteria above and must not match the criteria below.
- **Or** - item(s) must match either the criteria above or the criteria below.

7. Repeat steps 3-5 to add an additional line of search criteria; you can specify up to three different lines.
8. If you need to remove all your search criteria and start again, click **Clear**.
9. When you are finished specifying your criteria, click **Search**. All records matching your search criteria are displayed in the **Search Results** dialog box.

**Note:** If your search yields no search results, Concourse asks you if you would like to see a list of near matches. Click **Yes** to browse through the index keywords.

10. When you are finished viewing your results, close the **Search Results** dialog box, and then click **Done** on the **Expert Search** dialog box.

---

## Search by Barcode

The most precise search available in Concourse is the **Barcode Search**. This allows you to look for one specific item. For example, if a patron brings you a barcode label that has fallen off of an item, you can use this search to find out which item is missing the barcode so that you may replace it.

### Conducting the Search

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

2. Click the **Barcode Search** button on the flow chart to open the **Search By Barcode** dialog box.
3. In the **Barcode:** field, scan or enter the item ID/barcode number of the item.
4. Click **Search**. If the item is found, Concourse opens a card image of the item record in a **Search Results** dialog box; otherwise, a dialog box lets you know there was no match.
5. When you are finished viewing the search results, click the **New Search** button to return to the **Search By Barcode** dialog box.
6. Conduct as many searches as needed by repeating steps 2 and 3.
7. When you have completed your search(es), click **Done** to close the **Search By Barcode** dialog box.

---

## Find Item for Study Program

Use this search feature to locate a particular item in a study program. This search is very flexible; you can use any part of it to search the database. For example, you may search for items of a certain point value regardless of title, author, study program, etc. You may also search for items by a particular author for students of a certain reading level, or you may search for all of the items in a specific study program.

The qualifier for the first two searches is **equals**, so search terms must match exactly. For example, if you are searching for a book entitled *Dog Company Six*, you would have to enter **DOG COMPANY SIX** to produce the correct result. If you entered **DOG COMPANY**, Concourse would not be able to produce the correct item record. Also, these search fields are combined with the Boolean operator **And**, so *both* criteria must be met, if entered.

For example, assume you have a 4th grade student who is reading below grade level, and he is trying to accrue points in the **Accelerated Reader** program. You talk to him about his interests and determine that he likes science fiction.

### Conducting the Search

1. Click the **LOOKUP** button on the **Navigator Toolbar**.
2. Click the **Study Program Search** button on the flow chart to open the **Find Item for Study Program** dialog box.

3. Enter one or more of the following search criteria:
  - Specify the data types that you want to search in the **Search for items that match:** drop-down lists, and then enter search term(s) in the corresponding field(s).
  - Click the **Limit to Specific Study Program** drop-down button, and click again to select a particular program or to select **Do Not Limit** if you need to search them all.
  - If you need to find items by their level/value, you can click the **Equals, Greater than, or Less than** radio buttons in the **Interest Level, Reading Level, and Value** sections, and then enter your criteria in the corresponding fields.
  - If you want to search for a particular word or phrase contained within the **Notes** entered on the **Programs** tab of the **Add/Modify Items** dialog box, enter the text in the **Limit by Note contains:** field.
4. If you need to remove your criteria and start over, you can click **Clear**.
5. Click **Search**. The results are displayed in the **Search Results** dialog box.
6. When you are finished, close the **Search Results** dialog box, and click **Done** on the **Find Item for Study Program** dialog box.

## The Search Results Dialog Box

All search results are displayed in the **Search Results** dialog box. This dialog box also allows you to review and customize the data produced by your search.

The screenshot shows a window titled "Search Results" with a blue header. Below the header are four tabs: "Video Clip", "Music/Sound", "Image", and "On-line Document". The main area displays "5 Matches found" and a table with the following data:

	ItemStatus	Call Number	Author's Name	Title	Copyright	
1	In	E Chr		The Chronicles of Narnia	2007	
2	In	FIC LEW	Lewis, C. S. (Clive Staples),	The Lion, the Witch, and the Wardrobe	1994	Four English schoolchil back of a wardrobe int
3	In	FIC LEW	Lewis, C. S. (Clive Staples),	The Magician's Nephew	1994	When Digory and Polly Jadis to her own world
4	In	FIC LEW	Lewis, C. S. (Clive Staples),	The Last Battle	1994	When evil comes to Na great last battle and A:
5	In	FIC LEW	Lewis, C. S. (Clive Staples),	The Horse and His Boy	1994	A boy and a talking hor dangerous journey to h

At the bottom of the dialog box is a toolbar with several buttons: "Limit" (with a bar chart icon), "Mediagraphy" (with a book icon), "Sort..." (with a list icon), "Print" (with a printer icon), "New Search" (with a magnifying glass icon), "Help F1" (with a question mark icon), and "Full Info" (with a magnifying glass icon). There are also navigation arrows and a dropdown arrow.

The way the **Search Results** dialog box displays depends on the number of matches Concourse finds for your search. If there is only one item, the dialog box displays in card catalog format (**Full Info**). If there are multiple items, the dialog box displays all items in a list format (**Summary**). Each record in the list is numbered, and column headings are included at the top to organize each record's information and make it easier to read.

The media buttons located along the top border of the dialog box allow your patrons to access any additional information that may be attached to an item record. These buttons are enabled when the selected item of the **Search Results** list contains one or more of the media files listed below. To make these buttons active, you must link a multimedia file to an item in the **Media** tab of the **Add/Modify Items** dialog box; for more information, see the "Media Tab" section in **Chapter 5**.

- Video Clip
- Music/Sound
- Image
- Online Document

The number of items found as a result of your search is displayed below the media buttons.

The buttons located along the bottom border of the dialog box allow you to manipulate your results list:

- Click the **Limit** button to open the **Limit Search Results** dialog box where you can specify filters to narrow your results.
- Click the **Mediagraphy** button to build a mediagraphy, a customized, printable search results list that makes locating items on the library shelves easier.
- Click the **Sort...** button to sort the items in your list.
- Click the **Help F1** button to access the Help topic about the dialog box.
- Click the **Print** button to print the listed information.
- Click the **Full Info** or **Summary** button to change the format of your search results. If you see a list of results, click **Full Info** to display the selected record in card catalog format. If you see one record, click **Summary** to view a list of results.

**Note:** When you are in **Full Info** format, you may see single or double-underlined text similar to a hyperlink. Double-click underlined text to see search results for that term/name. For instance, if you double-click an author's name, the **Search Results** dialog box refreshes with a list of items written by that author.

- Click the **New Search** button or press the **Esc** key to return to your previous search dialog box.
- Click the **up arrow** to go back to a previous item in your list and the **down arrow** to move to the next item. You may also use the **up** and **down** arrow keys on your keyboard to move through the list.

## Mediagraphies

A **Mediagraphy** is similar to a bibliography; it is a customized list of items you compile from one particular search or from multiple searches. This could help you or your patrons find items on library shelves more easily. For example, if an elementary school teacher requests a list of books and/or movies about the various holidays celebrated in December, you could compile a mediagraphy in the following manner:

- First, perform an **Easy Word Search** using **Christmas** as the criteria (see the “Easy Word Search” section earlier in this chapter). When the results display, click a title, such as **‘Twas the Night Before Christmas**, and then click **Mediagraphy** from the **Search Results** dialog box to access the **Media Options** menu. Click **Add current item**, which adds the item to your mediagraphy. Close the **Search Results** dialog box to return to the **Easy Word Search** dialog box.
- Conduct other keyword searches to locate items about other holidays, like Kwanzaa or Hanukkah. From each **Search Results** dialog box, add items to your mediagraphy as needed using the steps above.
- When you are finished, with the **Media Options** menu open, click **Print** to generate a hard copy of the mediagraphy for the teacher so that he/she may examine the items before checking one or more of them out.

Once you have added a few items to a mediagraphy, you can review the full list and then sort those items in numerous ways. If needed, you can click **Done** to dismiss the dialog box and continue adding items to your mediagraphy; you can review the list again at any time, choose a different sort as needed, and print your list. See the section below to learn more about these features.

### The Media Options Menu

The **Media Options** menu contains all the functions to use mediagraphies. To open this menu, click the **Mediagraphy** button in the **Search Results** dialog box. Options include adding items, clearing items, and reviewing or printing the entire list.

#### Add current item

Before you click this button, make sure you have already selected the item you wish to add from the **Search Results** dialog box.

**Note:** Initially, the first item in the search results list is selected, but you can choose others by either clicking the **Next** or **Previous** buttons located at the bottom right or by clicking the one you need.

The menu closes and the item is added to your mediagraphy. The next time you click the **Mediagraphy** button, the number at the bottom of the menu reflects the current total; this number continues to update each time you click **Add current item**.

### **Add selected items**

Before you click this button, make sure you have already selected the items you wish to add from the **Search Results** dialog box. To select multiple items, click the *number* to the left of the first item, press and hold either the **Shift** or **Ctrl** key, and then click the additional items. Use the **Shift** key to select a list of consecutive items; otherwise, use the **Ctrl** key if you need to select non-consecutive items in the results.

After you click the **Add selected items** button, the **Media Options** menu closes. The next time you click **Mediagraphy**, the number at the bottom of the menu reflects the new total.

### **Add all items**

If you click **Add all items** from the **Mediagraphy** menu, all of the items on your current results list are added to your mediagraphy. The mediagraphy menu closes, and the next time you select **Mediagraphy**, the number at the bottom of the menu reflects the new total.

### **Review**

Before you attempt to review your mediagraphy, you must have successfully added at least one item to it. Open your mediagraphy by clicking **Review** from the **Media Options** menu.

The **Mediagraphy** dialog box opens above the **Search Results** dialog box. The two views are similar but have two important differences:

- The **Remove** button replaces the **Mediagraphy** button, allowing you to remove the currently selected item from your list.
- The title bar now reads **Mediagraphy**, and the number of items noted at the top reflects the number of items in the mediagraphy instead of the number of search results.

When you are finished, click **Done** or press the **Esc** key to close the dialog box.

### **Clear**

If you have compiled a mediagraphy but need to start over for some reason, click **Clear** to delete the contents of your mediagraphy and begin again.

### **Print**

When you select this option, a **Print** dialog box displays over an open **Mediagraphy** dialog box. If needed, enter a caption in the **Title:** field of the **Print** dialog box. Click **OK** to print.

## Chapter 8: Reports

Concourse provides you with the ability to generate a variety of reports that can be customized as applicable to suit the needs of your library. You can use these reports to extract a broad range of information from your database.

Results display in a grid format with column headings and numbered rows to present information clearly. The **Ctrl + Click** feature is available from any report grid; see the “Using and Customizing Grids” section in **Chapter 2** for more information.

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### Types of Reports

This section briefly describes all reports available in Concourse. These reports can be filtered to find specific information from your database. Most reports can be customized with the **Build Filter** dialog box, while the patron reports have unique filtering options. For more information on the **Build Filter** dialog box, see the “Build Filter Dialog Box” section in **Chapter 2**; the additional filters for patron reports are discussed later in this chapter.

**Note:** Many of these reports can be used to review database information *or* access records to edit. Use the **Ctrl + Click** feature where applicable to open and modify records listed in reports. To see any changes within a report, it must be regenerated.

#### **List of Patrons** (requires Level 3 Concourse license or higher)

This report generates a list of patrons in your database. The report is sorted by patron name and includes the fields **Patron Name**, **Patron Barcode**, **Address**, and **Home Phone**.

#### **List of Patrons with Items** (requires Level 3 Concourse license or higher)

This report not only generates a list of patrons in your database, it includes the items checked out to each patron. The report displays patron data (name, barcode, class) in a large font before it lists details about his/her items. By default, the report includes the following item fields: **Call Number**, **Title**, **Author**, **Barcode**, **Cost**, and **Due Date**. You may also add and remove fields if needed; for example, if you add **Address** and **City, State Zip**, the information displays after the patron’s name.

#### **Accession List**

This report generates a list of items in your database including their **Entry Date**, **Barcode**, **Author’s Name**, **Title**, and **Cost**. It is sorted by barcode number. You can find all items in your database or filter for a specific group, such as items added in 2010 or items written by a particular author.

## List of Titles

This report generates a list of item titles in your database, sorting them alphabetically by title without duplicating copies in the results list. It includes the fields **Call Number**, **Author's Name**, **Title**, and **Barcode**. You can find all titles in your database or filter for a specific group.

## Titles Sorted by Author

This report generates a list of item titles in your database, sorting them alphabetically by the author's last name without duplicating copies in the results list. It includes the fields **Call Number Line 1**, **Author's Name**, **Title**, and **Barcode**. You can find all titles in your database or filter for a specific group.

## Shelf List

This report is used primarily to audit your holdings. It generates a list of items in your database, including all copies in the results list. It is sorted by Call Number (i.e., shelf arrangement). It includes the fields **Call Number**, **Author's Name**, **Title**, and **Barcode**. You can view all items on your shelves or filter for a specific location/branch, Call Number value, etc.

## Study Programs Report

This report generates a list of items in your database that are associated with a study program. It is sorted by item ID number and includes the fields **ItemID**, **Title**, **Study Program**, **Point Value**, **Interest Level**, and **Reading Level**. You can find all items associated with any study program or create filters, such as **Study Program contains phrase ACCELERATED**.

**Note:** If an item has been associated with several study programs, it may display several times on the list. If multiple copies of an item have been associated with a single study program, the item only displays once on the list.

## List of Overdue Items

This report generates a list of items that are currently overdue. It is sorted by barcode and includes the fields **Call Number**, **Title**, **Author's Name**, **Barcode**, **Due Date**, and **Checked Out To**. You can generate a list of all overdue items or items that are overdue for a certain amount of time.

**Note:** The **Checked Out To** field notes both the patron's name and his or her ID/barcode number, which displays in parentheses.

## List of Reserved Items

This report generates a list of items that are currently on reserve. It is sorted by item ID/ barcode number and includes the fields **Call Number**, **Title**, **Author's Name**, **Barcode**, **Due Date**, **Checked Out To**, and **Reserved For**. You can find all reserved items or specific ones; for instance, if you would like a list of reserved items that have not been checked out (and thus should be placed on your reserve shelf), you can filter for **Checked Out To *is empty***. If a single item has been reserved by more than one person, it is listed multiples times.

**Note:** **Checked Out To** and **Reserved For** both note the patron's name and his or her ID/barcode number, which displays in parentheses.

## List of Messages

This report generates a list of messages that are associated with patrons and/or items. It is sorted by message date and includes the fields **Message Text**, **Message Date**, **Item Barcode**, and **Patron Barcode**. You can view all messages to check for relevance and uniformity, or you can filter for specific messages. For example, you could filter for **Last Updated By** to find all messages added by a particular worker.

## Name Authority (requires AUTHORITY license)

This report lists author names alphabetically by last name as they are entered within the **Core** tab of the **Add/ Modify Items** dialog box. It lists each author name and the number of item records in which it is used. This report can help you validate author names when creating bibliographic records.

## Subject Authority (requires AUTHORITY license)

This report lists subjects alphabetically as they are entered within the **Analytics** tab of the **Add/Modify Items** dialog box. It lists each subject heading and the number of item records in which it is used. This report can help you validate subjects when creating bibliographic records.

## Holdings Summary

This report generates a summary of your holdings with statistics grouped by each item class. The report details how many items you have, how many are lost, how many items are checked in and out, how many items are on reserve, the total and average cost of the items within the class, and the average copyright.

There are five tabs at the bottom of the report that correspond to the five item class types in the program: **Classification** (Report Class), **Material Type**, **Circulation Type**, **Age Group**, and **Location**. Each tab includes columns for **Category/Class**, **Have**, **Lost**, **Out**, **In**, **Reserve**, **Cost**, **Average Cost**, and **Average Copyright**. Click any tab to view the report on that item class type.

**Note:** Concourse averages only real values for the **Cost** and **Copyright** fields. For example, if a cost of **\$0** is entered for a book, that book is not averaged into the total. Instead, Concourse assumes the field is blank.

The **Ctrl + Click** option generates the **Holdings Item List - Classification, Item Type** report, which includes details about the items within that class. This report is sorted by item ID/barcode number and includes the fields **Barcode, Author's Name, Title, and Cost**.

**Note:** The **ItemID** field does not display in the secondary report. If your barcodes and ID numbers are different, the report may appear to be randomly sorted.

The original report continues to display beneath the second one. To bring the original report to the top, simply click an exposed portion of its dialog box. You cannot create more than one secondary report at a time; if you **Ctrl + Click** on another class/report entry, the previous report will be replaced with a new report for the catalog you just selected.

If needed, use the **Ctrl + Click** feature again in the second report to open the **Add/Modify Items** dialog box for any item in the grid.

Filters do not apply to either report.

### **Collection Age Report**

This report generates a summary of your items and details how many were copyrighted per year, what percentage of your materials were covered in each year, the total and average costs of items copyrighted for each year, and what percentage of cost was spent for items for each year. The following fields are included: **Year, Count, Percentage by Count, Total Cost, Avg. Cost, and Percentage by Cost**.

The **Ctrl + Click** option generates the **Item List By Year** report, which gives details about the items copyrighted the year you selected. This report is sorted by item ID number and includes the fields **Copyright, Barcode, Author's Name, Title, and Cost**.

**Note:** The **ItemID** field does not display in the secondary report. If your barcodes and ID numbers are different, the report may appear to be randomly sorted.

The original report continues to display beneath the second one. To bring the original report to the top, simply click an exposed portion of its dialog box. You cannot create more than one secondary report at a time; if you **Ctrl + Click** another copyright year, the previous report will be replaced with a report for the year you just selected.

**Note:** Use the **Ctrl + Click** feature again in the **Item List By Year** report to open the **Add/Modify Items** dialog box for any item in the grid.

You can apply filters (see the “Build Filter Dialog Box” section in **Chapter 2**) to the **Collection Age** report. You can narrow the report to include only particular report classes. For example, you may only want collection age information for the **200s** report class.

## Statistics Reports

This section lists the different types of statistics reports. After you have generated any of these reports, the **Report Dates** function on the toolbar allows you to select a date range for the reported data. The report automatically updates the data each time you select a new date range.

None of the reports can be filtered, but if you are currently circulating items from more than one location (such as **Main Library** and **Bookmobile**), you may choose the appropriate location from the **For** drop-down list on the generated report. Column totals display in the last row.

- **Circulation by Item Report Class** – calculates the number of circulated items in each class. It includes the columns **Report Class**, **Checked In**, and **Checked Out**.
- **Circulation by Patron Class** – calculates the number of patrons in each class who have borrowed items from the library. It includes the columns **Patron Class**, **Checked In**, and **Checked Out**.
- **Ca\$h Drawer** – calculates the total amount of fines received and waived within each report class. It includes the columns **Report Class**, **Received**, and **Waived**.
- **Items Added/Deleted** – calculates the number of items that have been added to or withdrawn from each item report class. It includes the fields **Report Class**, **Added**, and **Withdrawn**.













**Note:** If you delete a record from your database, the report notes that an item has been withdrawn. However, if you mark an item lost, the report reflects no change because the item remains in the database.

- **Patrons Added/Deleted** – calculates the number of patrons that have been added to or removed from each patron class. It includes the fields **Patron Class**, **Added**, and **Removed**.
- **Item Usage Report** – provides item usage information for a specified time period. The report includes the **Entry Date**, **Item Usage mm/dd/yyyy - mm/dd/yyyy**, **Barcode**, **Author’s Name**, **Title**, and **Cost** fields.
- **In House Usage** – provides in-house item usage information for a specified time period. You can log in-house circulation from the **CIRCULATION** menu. This report allows you to track use by report class and includes columns for **Report Class**, **Used In House** (number of items used in the library), and **User Defined** (number of items used for a user-defined purpose).










## Report Toolbar

The **Report Toolbar** includes applicable buttons to customize your report, print and export results, delete records, and more. Each button in the toolbar is described in **Table 3: Report Toolbar**.

**Table 3: Report Toolbar**

	Click the <b>Save Current Filter</b> button to store your filter criteria and custom formatting for the report you are viewing so that you can quickly regenerate a report at any time that contains current data that matches your criteria in the format that you need.
	Click the <b>Print</b> button to open your <b>Print</b> dialog box, where you can generate a hard copy of the current report.
	Click the <b>Preview</b> button to open the <b>Print Preview</b> window, where you can see what the printed pages of your report will look like. Click <b>Close</b> from the <b>Print Preview</b> window to return to the normal report view.
	Click the <b>Zoom In</b> button to make the words display larger on the screen.
	Click the <b>Zoom Out</b> button to make the words display smaller on the screen.
	Click the <b>UnZoom</b> button to return to the default magnification setting.
	Click the <b>Change Color</b> button to change the color of the alternating fields in your report.
	Click a column heading, and then click the <b>Align Left</b> button to left justify the text in that column.
	Click a column heading, and then click the <b>Center</b> button to center the text in that column.
	Click a column heading, and then click the <b>Align Right</b> button to right justify the text in that column.
	Click a column, and then click the <b>Configure Appearance</b> button to open the <b>Format Display</b> dialog box, which allows you to customize column font, color, border, alignment, and style. For more information, see the “Formatting Reports” section later in this chapter.
	Click the <b>Add Column</b> button to open the <b>Add Field to Report</b> dialog box, which lets you select a data field to add to your report, specify the width of the new column, and specify the justification of its text. By default, <b>80</b> (pixels) displays in the <b>Field Width:</b> field.

**Table 3: Report Toolbar**

 (items)	Click the <b>Export to Text</b> button to save your report as a .txt file that you can open later in Notepad, Word®, or any other suitable program.
 (patrons)	Click the <b>Export Patron data</b> button to access the <b>Export Patrons</b> dialog box. This option allows you to export the patron data from your report to a text file. For more information, see the “Exporting Patron Records” section in <b>Chapter 4</b> .
	Click the <b>Export to XML</b> button to export data from your report to an XML file. The <b>Save As...</b> dialog box opens; select the directory and specify the file name and then select <b>Save</b> to generate the XML export file. See the “Exporting to XML” section later in this chapter for a more detailed explanation.
 (items)   (patrons)	Click the <b>Bulk Delete</b> button (appearance depends on which report you have open) to simultaneously delete several items or patrons.
	Click the <b>Bulk Edit Call Number Prefixes</b> button to edit Call Number prefixes, which is available for the following: <b>Accession List, List of Titles, List of Titles (Sorted by Author), Shelf List, List of Overdue Items, and List of Reserved Items</b> .
 (items)   (patrons)	Click the <b>Edit Mode</b> button (appearance depends on which report you have open) to modify eligible fields in your reports.
	Click the <b>Graph Columns</b> button to compare data easily for the <b>Holdings Summary, Collection Age, and Statistics</b> reports.

---

## Generating a Report

The following process applies to all new reports except the **List of Patrons** and **List of Patrons with Items** reports, which have unique filter options. To generate a **List of Patrons with Items** report, see the next section.

Click the **REPORTS** button on the **Navigator Toolbar**. Then click a specific button to see a list of reports in that category or run that report; otherwise, click the **Reports** button on the flow chart to see all options, and click again to select the report you need. If the report allows you to filter your results, a message dialog box opens, asking if you would like to specify a filter.

- Click **Yes** to build a filter, and then click **OK**. Use the steps in the “Build Filter Dialog Box” section in **Chapter 2** to create the filter criteria you need.
- Click **No** to bypass the filter option and run a standard report.
- Click **Cancel** to quit the report.

If your query returns no results, a message dialog box displays. You must click **OK** to dismiss it before you can attempt to generate another report.

If your query is successful, the **Please Wait ... Processing** dialog box displays to let you know the report is generating, and the report soon displays on the screen.

**Note:** For more information about each report’s result grid, see the appropriate report in the “Types of Reports” or “Statistics Reports” sections earlier in this chapter.

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## List of Patrons with Items Report

This report uses a unique series of dialog boxes, which allow you to customize your report using the **Build Filter** dialog box you see with other reports as well as several other filter options related to a patron’s circulation status.

1. Click the **REPORTS** button on the **Navigator Toolbar**.
2. Click the **Patron Reports** button on the flow chart to open a shortcut menu.
3. Click **List of Patrons with Items** to open the **Select source of report** dialog box.
4. Click one of the following radio buttons:
  - **New report** – Create a new report with a new filter.
  - **Existing report** – Use a pre-configured or saved report. When you select this option, a list of saved reports displays in the field below the radio buttons. Click the report you need to use.
5. Depending on your selection in step 4, do one of the following:
  - If you clicked **New report**, click **Next >**.
  - If you clicked **Existing report** and want to modify the existing report’s filter information, click the **Modify the existing report** check box and then click **Next >**.
  - If you clicked **Existing report** and want to run the saved report without making any changes, click **Finish** and skip to step 17.

**Note:** If needed, you can delete a saved report from this dialog box by clicking a report and then clicking the **Delete Selected Report** button.

6. If you clicked **Next >**, the **Select Patrons** dialog box opens. 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.
7. 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.
8. Click **Next >**. The **Select Fields in the Report** dialog box opens with the default fields that display on the report in the **Fields to Print** list on the right.
9. To add a field to your report, click **Add Field** to open the **Add Field to report** dialog box. Click to select any fields you wish to add to the report, specify the width of the new column, and specify the alignment. If needed, press **Ctrl** and then select other fields to add more than one. Click **Add Field(s)** to add the patron data fields to your report. Click **Cancel** to return to the previous dialog box without adding fields.
10. To delete a field from your report, click to select the field and then click **Delete Field**. Repeat this step for each field you need to delete.

11. Specify the item data you need to list on the generated report by selecting the following options in the **And include this information** box.
- **Reserved items** – Click this check box to include entries on the generated report for any items each 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 entries for any items that are currently checked out to a patron, click to deselect this check box.
  - **Only include Overdues** – If you left the **Check 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 see entries for both overdue items and items that are checked out in good standing.
  - **Fines** – Click this check box to include items for which a patron has unpaid fines.

**Tip!** If you choose to include each patron's fines, you may want to add the **Amount Owed** field to the **Fields to Print** section so that the total of his or her fines will also display.

12. Click **Next >**. The **Advanced Patron Report Sort** dialog box opens.
13. 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. For more information about sorting, see the "Right-clicking" section in **Chapter 2**.
14. Click **Next>**. The **Save Report** dialog box opens.
15. To save your report filter, enter a name in the **Filename** field.

**Note:** If a name already displays in the **Filename** field, you have modified an existing report. If you do not change the name, the changes you have made will override that report.

16. Click **Finish** to generate your report.
17. A **Please Wait ... Processing** dialog box opens.
- If your query is successful, the report displays when the generation is complete. A set of rows displays for each patron: the first row displays the patron's name, patron ID number, and patron class; the second row displays the number of items checked out; the subsequent rows list the item records that match your filter criteria. Notice that the column headings correspond to the item rows.
  - If your query returns no results, a message dialog box displays. You must click **OK** to dismiss it before you can attempt to access another report.

**Note:** For more information about the report's result grid, see the related description under "Types of Reports" earlier in this chapter.

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## Formatting Reports

You can modify the physical appearance of any report using the **Format Display** dialog box. All formatting changes you make before saving a report are reproduced when you rebuild the saved report.

**Note:** Your modifications only affect the report's printed appearance if you have a printer that supports them. When you change anything in the report's appearance, you can check it with the **Print Preview** function before you print your report.

### Modifying the appearance of a report

1. Select the column(s) or row(s) you need to reformat in one of the following ways. The selection is highlighted in a contrasting color, and the **Configure Appearance** button is activated.
  - Click a column header to select the full column.
  - Click a row number to select the full row.
  - Click the empty cell in the upper, left-hand corner (above the row numbers and to the left of the column headings) to select all rows and columns.
2. Click the **Configure Appearance** button to open the **Format Display** dialog box.
3. Click to select the tab associated with the format settings that you want to modify:

#### Font

- Change the font type (from all fonts available on your computer), style (such as *italic* and **bold**), point size, and text color.
- Apply ~~Strikeout~~ and Underline effects to the text.
- See the results of your font changes in the **Preview** box.

#### Color

- Add a pattern to the background using the drop-down list.
- Change the background or foreground color by making a selection from the appropriate palette.
- Apply a 3D effect to the background; choices include **Raised** (like a button), **Inset** (recessed), or **Normal** (flat). **Default** and **Normal** are equivalent.
- See a sample of your background choice in the **Preview** box.

#### Align

- Click the appropriate radio button to configure the *horizontal* text alignment within the cells of the selected row(s) or column(s): **Standard**, **Left aligned**, **Center**, or **Right aligned**.
- Click the appropriate radio button to configure the *vertical* text alignment within the cells of the selected row(s) or column(s): **Standard**, **Top**, **Center**, or **Bottom**.
- Click to enable or disable the **Wrap Text** check box. This allows text to break across multiple lines.

- Click to enable or disable the **Auto Size** check box. This automatically adjusts row height to accommodate multiple lines of text, eliminating unnecessary white space.
- Click to enable or disable the **Allow Enter** check box. This allows you to 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

- Apply preset formats 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.

Marshall, Peter, 1940-	The Light and the Glory : 1492-1793
Ludy, Eric.	The Bravehearted Gospel
Ludy, Eric.	Wrestling prayer

- **Column Header** – use the formatting from the row displaying the column headings.

<b>Author's Name</b>	<b>Title</b>
----------------------	--------------

- **Row Header** – use the formatting from the column displaying the row numbers.

166
167
168

4. Click **OK** at the bottom of the **Format Display** dialog box to apply your changes to the selected portion of the report; otherwise, click **Cancel** to close the dialog box without saving your changes.

## Exporting to XML


Some of the reports have a button labeled **XML** (eXtensible Markup Language). XML translates information to and for the World Wide Web, making it easier to define, author, manage, transmit and share Web documents. Because it is a metalanguage (a language used to describe other languages), it lets you design your own tags, enabling you to develop your own way of marking your data.

When you click the **XML** button on a report screen, Concourse takes the information that is contained in the report and converts it to XML.

## Why should libraries export records using XML?

Processes like the **School Interoperability Format** (or other non-school library interactions) may require you to transfer your data from one program to another within your system that does not use the same software. For example, a high school librarian's patron report may be required by the school office. An XML export would allow the librarian to drop the data to a file that the office could upload.

### To Export Records to XML

1. From the **REPORTS** flow chart, select any report that contains an **XML** button, such as a **List of Titles** or **List of Patrons** report. Concourse prompts you to specify a filter.
2. Click **Yes** to set up your criteria; otherwise, click **No**. See the "Build Filter Dialog Box" section in **Chapter 2** for more information.
3. Once the report is built, click the **XML** button  on the toolbar. The **Save As** dialog box opens. Depending on which type of report you are using, the name **items.txt** or the name **patrons.txt** displays in the **File name:** field.  
**Note:** When you are saving the file, you can change its extension to **.xml** by deleting the **.txt** file extension and replacing it with **.xml**. This change will make a difference in the look of the output file.
4. Specify the location where the file is to be stored and click **Save**.

### To Open an XML file

- Browse to the location of your XML file.  
**Note:** This activity is done outside of Concourse.
- Double-click to open either a **.txt** file or an **.xml** file. The **.txt** file will open in Notepad and the **.xml** file will open in your Web browser.

## Chapter 9: OPAC

**OPAC** provides patrons with easy access to your library's catalog database so they can browse and search the library's holdings and view attached media files. To facilitate the searching process, you can customize OPAC to reflect the needs of your patrons more effectively.

### Configuration Options

Workers with the *Setup Program* permission can open the **Concourse OPAC Administration** dialog box in order to configure, modify, and/or shutdown your OPAC. Simply press **F10** five times from the main screen display in **OPAC**. When the dialog box first opens, only the **Statistics** section displays; click **Advanced >>** to open the **Enter Administration Password** dialog box where you can enter a valid user name and password. The dialog box expands to show the **Settings** section.

You can personally configure the appearance of several **OPAC** features. The following configuration options are available.

- Limit patrons and unauthorized employees from accessing other programs that are running on your system by disabling **ALT + TAB** switching, hiding the **Exit** button, specifying a full screen display, and/or prompting for a password on exit and shutdown.
- Enable or disable patron printing.
- Add search options and enable your patrons to browse for near matches if no matching search results are found.
- Change the main screen 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 it closes, and only the main screen displays.
- Add, edit, or remove images displayed in the **Visual Search** dialog box.
- Change the name and shortcut key of the **Visual Search** button located in the main screen display.
- Modify the results list that displays in the **Search Results** dialog box.

	Searches	Matches
Visual	6	138
Simple	4	7
Study	0	0
Easy Word	1	3
Power	1	2
Expert	1	1
C.E.R.F.	0	

**Settings**

Disable ALT+TAB switching  
 Disable Printing  
 Default Printing  
 Full Screen Display  
 Hide Exit Button  
 Prompt for Password on Exit

Enable Browse Searching  
 Browse Always  
 Browse C.E.R.F. Always

Visual Search  
 Simple Search  
 Study Program Search  
 Easy Word Search  
 Power Search  
 Expert Search  
 C.E.R.F. Search

Use Patron Barcode for Reserve Requests

Background Image: C:\Book Systems, Inc\Concourse\config\OpacDrop.bmp

Save last grid column positions  
 Prompt for Password on Shutdown  
 Reset Screen after 3 minute(s)  
 Display Hyperlink  
 Enable visual search right-click menu

Text: Book Systems, Inc.  
URL: http://www.booksys.com  
Unvisited [ ] Visited [ ]  
Marquee... Visual Search...

Email Requests To: [ ]  
SMTP Server: [ ]  
 Use Email SSL Authentication  
ID: [ ]  
PSWD: [ ]

Buttons: OK, Cancel, Exit, Shutdown!, Advanced >>, Help

## Changing the Main Screen 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 window are changed accordingly.

### Adding a Different Background Image

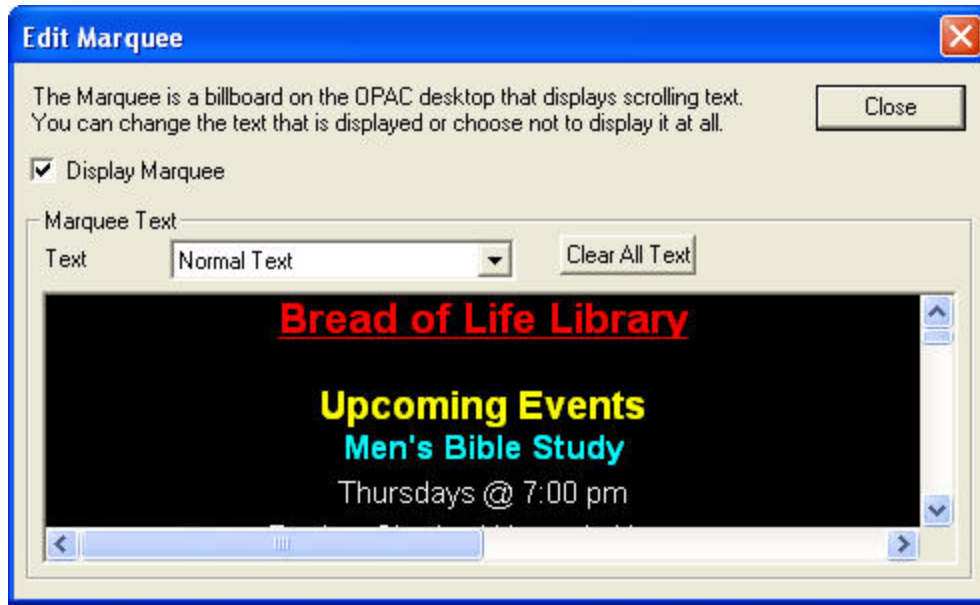
You may use any image as the background of main window. To change the default image to a digital picture of your library, for example, save the picture as a **.bmp**, **.gif**, or **.jpg** file and click the **Background Image** check box. Then enter the name and location of your file into the field provided; 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

If you would like to inform your patrons of upcoming events or new releases, you may add a scrolling marquee. Create or edit your message with the **Edit Marquee** dialog box, which can be opened by clicking the **Marquee** button.

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 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 want the scrolling marquee to inform your patrons of community or church events, for example, you might enter **Upcoming Events** 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 or church event, for instance, **Book Fair** or **Men's Bible Study**.
- **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 access a designated site on the Internet from the main OPAC window. When they click the hyperlink, your specified Web page opens.

Use the **Display Hyperlink** check box to add a hyperlink to the main OPAC window. After this check box is selected, you may enter the appropriate text and URL.

**Note:** A URL is a **Uniform Resource Locator**. It consists of a string of characters that identify Internet documents by revealing the document's type, source, and location.

For example, if you would like to display a link to children's poetry, click the check box and enter **Poetry Fun Page** in the **Text** field. Enter **http://www.gigglepoetry.com** in the **URL** field. **Poetry Fun Page** is added to the main OPAC window, and when your patrons click the hyperlink, OPAC would automatically open **Giggle Poetry's** home page.

You may also select the color of your link. If you'd like, 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 a color from the default options or customize a color by selecting **Define Custom Colors**.

## Resetting the Main Screen

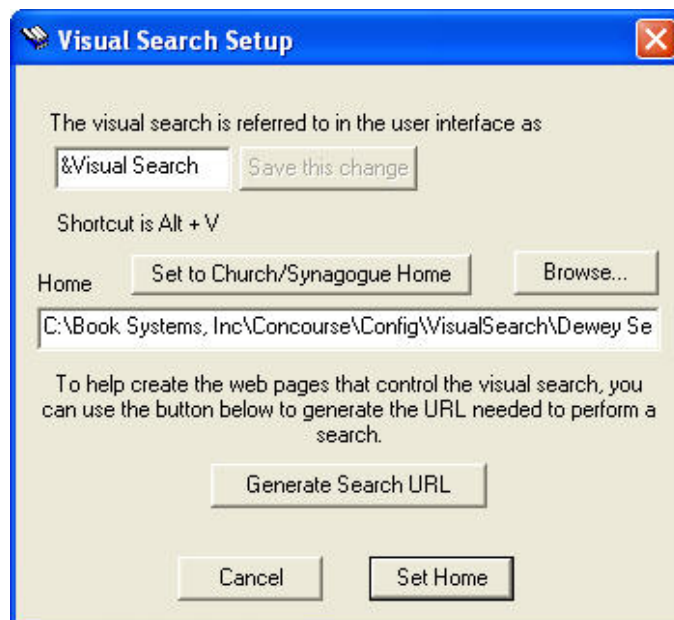
If a patron steps away from an open dialog box and/or search results, OPAC resets to the main window after a specified amount of time. You can easily set or change the designated amount of time by selecting the **Reset Screen after # minute(s)** check box and entering a time in the appropriate field; you can also click the up or down arrows to change the number of minutes.

## Modifying Visual Search

Many of the **Visual Search** features may be modified. You can change the name of the **Visual Search** button located on the main screen display, 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 the shortcut key are changed simultaneously from the **Visual Search Setup** dialog box. Before you attempt to change the name of **Visual Search**, 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 press in addition to **ALT** to access **Visual Search** using 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 that you want to be the shortcut key; possible keys 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, and the new shortcut **ALT + I** would give you access to the **Visual Search** option.

- If you typed **I&image 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** Web pages unless you have prior HTML experience.

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 select 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 may 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 and name your search. Make sure that the criteria entered matches the data found in the HTML file you are referencing. If needed, you can join two search terms with a Boolean operator.

For example, if you would like OPAC to produce a list of items containing the words **DOG** and **CAT** when your patron selects an image containing dogs and cats, 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, click **Keyword Search** from the **Look for** drop-down list and enter **DOGS** in the corresponding field after the word "matching." Then click **Keyword Search** from the second **Look for** drop-down list and enter **CATS** in the corresponding field. Join the two search terms by selecting the Boolean operator **And**.

You may sort and/or filter your search results by clicking the **Set Sort...** button, 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 of your filters in the **Search Results** dialog box. When you are finished, close the dialog box, and the **Generate Visual Search URL** dialog box continues to display beneath it where you can make changes if needed. If you are satisfied with the results list, click the **Generate URL** button in the lower, left-hand corner of the dialog box. The URL automatically displays in the field to the right.

**Important!** 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 **DOGS** and **CATS**.

## Modifying the Results Display

Results from any type of search performed in OPAC are displayed in the **Search Results** dialog box. If you wish to eliminate certain fields, prefer a different field order, or would like to change column width, you may do so. First, click the **Save last grid column positions** check box on the **Concourse OPAC Administration** dialog box, and click **OK**. After the dialog box closes, run a search using any of the search options in OPAC. The **Search Results** dialog box opens; make the adjustments to the columns and fields that display using the steps in the next two sections.

Once you are satisfied with the appearance of the **Search Results** dialog box, close it, and then go back to the **Advanced >>** extension of the **Concourse OPAC Administration** dialog box; click to deselect the **Save last grid column positions** check box. Click **OK** to save your changes.

## Manipulating Columns

To manipulate columns, place your cursor between the column headings located in the **Search Results** dialog box; the mouse pointer (white arrow) changes into a bidirectional arrow **↔**. Drag the line where you want to move it, and a line displays to mark the new width of the column. For example, if items have long titles, you can make the **Title** column wider.

To remove a column completely, place your cursor on the divider line and drag it until the column completely disappears. Double-click the divider point to undo. For instance, if your patrons do not need each item's ISBN number, you could remove the column from your results list altogether.

## Choosing Fields for Display

You can customize the **Search Results** dialog box even further by choosing the database fields you would like to display using the **Choose fields for display** dialog box. The fields correspond to the column headings of the results list.

- Press the **Ctrl** key while right-clicking a column heading in the **Search Results** dialog box to open the **Enter Administration Password** dialog box.

- Enter a worker name and password in the corresponding fields, and click **OK**. The **Choose fields for display** dialog box opens with the current fields listed on the right side of the dialog box and all other available fields are listed on the left.
- To add a field, click the field you need to add from the **All Fields** list and click **>>>** to add it to the **Current** list.  
**Note:** The field is automatically added to the bottom of the list, but if you do not want the new column to display at the end of your results list, you can click and drag to rearrange the order.
- If you need to remove a field, you can also click the field in the **Current** list and click **<<<** to transfer it back to the **All Fields** list.
- Click **OK**. The dialog box closes, and the **Search Results** dialog box reflects your changes.

### 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 selecting 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 action. Click **Yes** to continue.

## Chapter 10: Inventory

Concourse allows you to perform an inventory on your collection to identify lost books and to update year-end reports. This library function must be done periodically to ensure that materials are being returned and that the collection on your shelves matches what is cataloged in your database.

Concourse not only provides you with the ability to perform inventory without closing your library, but it also offers you a variety of inventory options, including the ability to mark items seen manually or with a barcode reader. (For more information about barcode readers, refer to **Chapter 12**.)

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### Inventory View Dialog Box





Among other things, the **Inventory View** dialog box allows you to build, finalize, and print an inventory list. It also enables you to record items as lost, found, or moved. Open the dialog box by clicking the **CATALOG** button on the **Navigator Toolbar**, clicking the **Perform Inventory** button on the flow chart, and then clicking **Inventory Items....**

The **Inventory View** dialog box may be empty if you have not yet started your inventory, or it may display a list of current inventory items. If you see items listed, the **Ctrl + Click** feature is available, allowing you to edit an item record in the **Add/Modify Items** dialog box.







Since inventory may take several days in a large library, you have the ability to close the **Inventory View** dialog box and exit Concourse without disturbing the inventory you have in progress. As long as you do not rebuild the inventory list, your current inventory list is saved, including all items you have marked lost or found.

A toolbar displays at the top of the **Inventory View** dialog box; all available buttons are described in **Table 4: Inventory Toolbar**.

**Table 4: Inventory Toolbar**

	<b>Start new Inventory</b> builds a new inventory list.
	<b>Finalize Inventory</b> finalizes the current inventory list. <b>Note:</b> All unmarked items will be counted as lost when the inventory is finalized, including any items that are checked out (technically these items may never be checked in). The circulation status of the items (i.e., the patron information associated with the item) is maintained, however. When these items are checked in, they can be marked found.
	<b>Print</b> generates a hard copy of the inventory list.
	<b>Mark "SEEN"</b> counts the currently selected item "seen." You can also use this after your inventory is finalized to mark items that were previously marked lost.

**Table 4: Inventory Toolbar**

	<b>Mark Lost</b> counts the current item “lost.”
	<b>Move Items</b> opens the <b>Move Items</b> dialog box, where you can change the Location, Report Class, Material Type, Circ Type, or Age Group of the currently selected item.
	<b>Portable Barcode Reader Functions</b> opens the <b>Portabar</b> dialog box. For more information about using this dialog box with barcode readers, see <b>Chapter 12</b> .
	<b>Add new column</b> opens the <b>Add Field to Report</b> dialog box, where you can specify the column(s) you need to add and change the width and alignment of the column.
	<b>Refresh</b> updates the current inventory list.
	<b>Status</b> opens the <b>Select Status</b> dialog box, where you can specify what information displays in the status bar at the bottom of the <b>Inventory View</b> dialog box. The total count and number of remaining items displays by default, but you can also view the seen items, lost items, and percentage of the inventory that has been processed.

---

## Building an Inventory List

Before you can begin marking items as “seen” or “lost,” you must generate an inventory list.

1. Click the **CATALOG** button on the **Navigator Toolbar**.
2. Click the **Perform Inventory** button on the flow chart to open a shortcut menu.
3. Click **Inventory Items...** to open the **Inventory View** dialog box.
4. Click the **Start new Inventory** button on the inventory toolbar.

**Note:** If you have already started an inventory that you have not yet finalized, you must confirm that you want to restart the inventory and abandon your previous inventory session. If you need to restart, click **Yes**. You should restart only if you have not yet marked any items (or very few items) in the inventory list. If the **Inventory View** dialog box is blank when you first access it, you will not see this message.

5. Concourse asks if you would like to specify a filter. Click **Yes** to open the **Build Filter** dialog box; click **No** to start the inventory without a filter, or click **Cancel** to abort the inventory process.
  - If you do not specify a filter, all items in your database are added to the inventory list.

- If you do specify a filter, the **Build Filter** dialog box opens where you can set your criteria (see the “Build Filter Dialog Box” section in **Chapter 2**). For example, you might filter by a particular physical location, material type, Call Number, etc. within the library, or you might filter by **ItemStatus does not contain phrase DUE** if you want to exclude all checked out items.
6. A **Please Wait ... Processing** dialog box displays to let you know the list is being generated. When the process is complete, the items display, sorted by Call Number, and a dialog box displays, notifying you that the inventory is initialized and asking if you want to print the results.
  7. Click **Yes** to print the list. Click **No** if you do not want to print.
- Note:** If you are performing a manual inventory (without a barcode reader), you will need to print the inventory list (see next paragraph). If you are using a barcode reader, you will not.


If you are manually performing inventory, use your printed list to check the items in your database against the items physically on your shelves. Enter results into Concourse by clicking to select items in the list and then using the buttons in the **Inventory View** toolbar to mark items seen or lost. If you mark any items seen out of their Call Number order, a dialog box opens to let you know the items were out of order; if you accidentally mark an item seen twice, a dialog box opens to say the item was already marked seen.

If you are using an M2800 portable barcode reader to mark your inventory, you should read the information in **Chapter 12** to perform your inventory.

---

## Finalizing Your Inventory

After you have completed your inventory and marked all located items as seen, you are ready to finalize your inventory.

1. If you mark all items in the list as seen, Concourse will prompt you to finalize. Click **Yes** to finalize.
2. If any items remain unmarked, click the **Finalize Inventory** button  on the toolbar.
3. A message dialog box displays with the following message: **This process will finalize your Inventory, marking # missing items as lost. This can only be done once per Inventory. Do you wish to continue?** Click **Yes** to continue; otherwise, click **No** to keep working in your inventory.

**Note:** If you find items that were missing when you finalized your inventory, you can mark items SEEN independent of inventory. You should click **No** to abort only if the number of items to mark lost is excessive. If that happens, you should make sure that you did not overlook any shelves.


4. If there were less than 50 items to mark lost, the inventory is finalized, and the **Inventory View** dialog box is cleared. If there were 50 or more items to mark lost, you must confirm that all unmarked items are lost. If you see the **Mark Lost** confirmation dialog box, enter the confirmation message (**MARK THEM LOST**) and then click **OK** to finalize.

**Note:** If you want to look for the unmarked items before finalizing and marking them lost, click **Cancel**. When you are satisfied that you have located all of the items in your list that are not lost, repeat this process to finalize your inventory.

---

## Moving an Item

Concourse allows you to change the **Location, Report Class, Age Group, Material Type,** and **Circulation Type** of items in your database. This allows you to move popular items from limited circulation to standard circulation, change items' location from a New Release shelf to their regular placement, and more.

1. Open the **Move Items** dialog box in one of the following ways:
  - Click the **Perform Inventory** button on the **CATALOG** flow chart, and then click **Move Items**.
  - Click the **Move Items** button  on the toolbar on the **Inventory View** dialog box.
2. By default, the **Change Location** check box is selected. If you are not changing this, click to deselect the check box.
3. By default, the following check boxes are not selected; if you wish to change one or more of these options, click to select the appropriate check box(es).
  - **Change Report Class**
  - **Change Material Type**
  - **Change Circ Type**
  - **Change Age Group**
4. From the drop-down lists beneath any of the check boxes you selected, choose the appropriate options.
5. If needed, enter a comment that explains why the item(s) are being moved (e.g., **move VIDEOS from NEW RELEASE to STANDARD CIRC**). This is added to the **Comment** field on the **Add/Modify Items** dialog box.
6. Enter the item barcode(s) to be changed in one of the following ways:
  - If you are not using a barcode reader, enter a barcode number in the **Item Barcode** field and then click the **Enter ID** button to add the item to the list. Repeat this step for each item to be moved.
  - If you are using a portable barcode reader, scan all of the items to be moved. Click **Download...** to access the **Portabar** dialog box and then download the items from your M3000 or M5000 barcode reader to add the item(s) to the list.

- If you are using a stationary barcode reader (connected with a keyboard wedge), scan the items to be moved in the **Item Barcode** field. The scanned items are added to the list automatically.
7. After you have added all items that you want to move to the list, click the **Move Items** button.
  8. A confirmation message displays. Click **Yes** to confirm that you want to move the items in the list; otherwise, click **No** if you do not want to change the records.
  9. A **Please Wait ... Processing** dialog box displays while the changes are made in the database. When the process is complete, the **Move Items** dialog box closes.



---

## Mark Items Lost/Found

Marking items lost or found is an easy way to keep your database current between regular inventories. You can mark items lost or found (seen) from either the **Inventory View** dialog box or from the **Mark Item Lost\Found** dialog box.

### From Inventory View

To use this method, your inventory grid must be empty or the item must be a part of the current inventory list. You cannot use this method when you are in the middle of inventory (all inventories must first be finalized).

- Enter the item ID/barcode number in the **Current** field.
- Click **Mark "SEEN"**  or **Mark Lost**  from the inventory toolbar.
- A dialog box displays to let you know that the item was either marked found (seen) or lost.

### From Mark Item Lost/Found

You *must* use this method if you are in the middle of inventory and the item is not a part of your current inventory list.

1. Click the **CATALOG** button on the **Navigator Toolbar**.
2. Click the **Mark Lost & Found** button to open the **Mark Item Lost\Found** dialog box.
3. Click to select the appropriate radio button; the button at the bottom of the dialog box toggles between **Mark Lost** or **Mark Found** depending on which radio button is selected:
  - **Mark Lost** – A patron lost the item or it cannot be located.
  - **Mark Found** – The item was recovered after being marked lost.
4. In the field provided enter the barcode number of the item. If you do not know the barcode number, click **Lookup....** The **Catalog Lookup** dialog box opens; see the "Catalog Lookup" section in **Chapter 5** for more information.
5. Click either the **Mark Lost** or **Mark Found** button to proceed. Concourse confirms that it marked the item as either lost or found.

6. Click **OK** to dismiss the confirmation message.
7. Repeat this process to mark other items lost or found, or click **Done** to close the dialog box.

## Chapter 11: Maintenance

In order to properly maintain your Concourse database, you need to perform maintenance operations to your data files periodically. Over time, as your database increases in size and modifications are made to your catalog records, you may notice a reduction in performance. Conducting regular file maintenance operations helps to keep your system running smoothly and regularly.

---

### Backup

You should backup your files every day. That way, if needed, you can restore a current copy of your database.

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 **Backup....**

**Note:** If you are not logged in, you can click **File | Maintenance | Backup...** from Concourse's menu bar.

4. A confirmation dialog box opens, stating that you must be logged out to perform this function. Click **Yes** to open the **Create Backup** dialog box.
5. In the **Last Backup** field, Concourse gives you the date of your last backup.
6. Specify where you want to save the backup file in the **Backup file to:** field by entering the location manually or clicking the **...** button to open the **Select Backup File** dialog box where you can navigate to the appropriate location. This dialog box defaults to the **A:\**.

**Note:** If your system is networked, you may want to backup to a server instead of one or more disks. Backing up to the server is a good idea, especially if you know the server is being backed up as well.

7. In the **Select Backup File** dialog box, specify the name of your file in the **File name:** field.

**Note:** When you restore, Concourse will look for the archive file **concourse.arq** by default; therefore, you may want to choose this name for your file. If you choose to name the file something else, you will have to enter or browse to it when you restore your database. If you chose to save your backup files to disks, make sure to store them in a safe place for easy recovery.

8. If you need to open the **Create Backup** dialog box each time you log off Concourse, click the **Remind to backup on exit** check box.
9. If you need to send your backup file to Book Systems using **RBS (Remote Backup Service)**, click the **Send backup file to RBS** check box. For more information about safeguarding your data with RBS, see the **Remote Backup Service** topic in the Help files.
10. Click **Yes** to begin the backup process.
11. If a backup file with the same name already exists, Concourse asks if you need to overwrite that file. Click **Yes** to continue; click **No** to dismiss the prompt and change your file name.

12. A **Backup Progress** dialog box opens, briefly displaying data as it is transferred to the file.

**Note:** The length of time that this dialog box remains open depends on the size of your database; smaller databases will take less time to backup than larger databases.

13. A dialog box displays to let you know when the process is complete. Click **OK**.



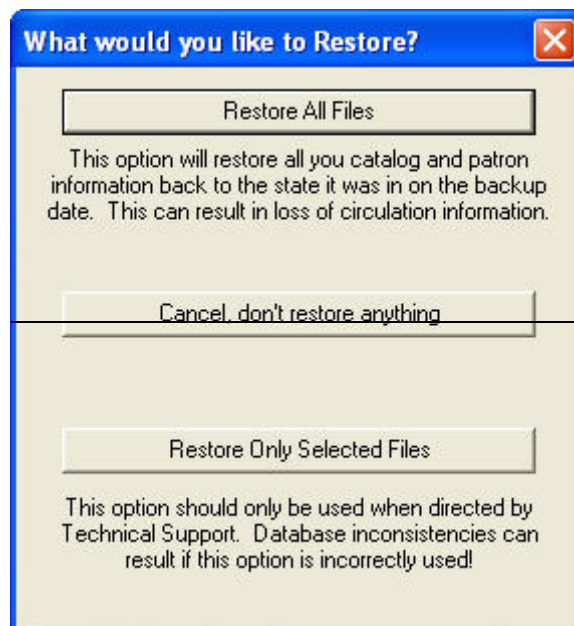
## Restore

If you have backed up your system, you can use the **Restore** option to load the backed up information back into Concourse. Keep your backups in a safe place and use them only if you need to recover the information in your system.

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 **Restore....**

**Note:** If you are not logged in, you can click **File | Maintenance | Restore...** from Concourse's menu bar.

4. A confirmation dialog box opens, stating that you must be logged out to perform this function. Click **Yes** to open the **Select Backup File** dialog box.
5. Locate your backup file, and click **Open** to access the **What would you like to Restore?** dialog box.



6. Click one of the following buttons:
  - **Restore All Files** – begins the restoration process immediately.
  - **Cancel, don't restore anything** – aborts the restore process without restoring any files.

- **Restore Only Selected Files** – opens a **Select Files To Restore** dialog box where you can select only those files that you need to restore. After you choose your files and click **Restore**, the restoration process begins.

**Important!** Only use this option if directed by Book Systems' Technical Support Staff.

7. If applicable, you may be prompted to overwrite files during the restoration process, click **Yes** to confirm the restore for a single file; click **Yes to All** to confirm the restoration for all existing files.
8. A **Restore Progress** dialog box opens, briefly displaying each file that is being restored.
9. A dialog box opens to let you know when the process is complete. Click **OK**.

Your files have now been restored and you can log back in to Concourse.

---

## Indexes

Concourse builds and maintains several lists of words or indexes derived from fields on the **Add/Modify Item** and **Add/Modify Patron** dialog boxes that are used for searching. If you seem to be getting inaccurate results from your searches or from the catalog or patron lookups, you should rebuild your catalog and/or patron indexes.

**Note:** When generating indexes, Concourse always ignores one letter words (**a, I**, initials, etc.).

To generate the following catalog indexes, click the **ADMIN** button on the **Navigator Toolbar**. Click the **Maintenance** button on the flow chart and then click **Rebuild Catalog Indexes...** from the shortcut menu. Concourse prompts you to log out; click **Yes**.

**Note:** If you are already logged off, you can click **File | Maintenance | Rebuild Catalog Indexes...** from Concourse's menu bar.

### ItemID Index

This index is built from the **ItemID** field. It is used from **Study Programs Search** when you select **ItemID** from the **Search for items that match:** drop-down list.

### Title Index

This index is built from the **Title**, **Series Title**, **T. Analytics**, **Parallel Title**, and **Uniform Title** fields. It is used from **Easy Word Search** when you click the **Title** check box and from **Expert Search** when you select **a title** from the drop-down list. Concourse does not include the words contained in the **title.ign** (ignore) file when compiling this index; find more information about ignore files later in this section.

### **Author Index**

This index is built from the **Author** and **A. Analytics** fields. It is used from **Easy Word Search** when you click the **Author** check box and from **Expert Search** or **Catalog Lookup** when you choose one of the **author's name** options from the drop-down list. Concourse does not include the words contained in the **name.ign** (ignore) file when compiling this index.

### **KeyWords Index**

This index includes information from the **Subject Headings**, **Note**, **Summary**, **T. Analytics**, **S. Analytics**, **Artist**, **Parallel Title**, and **Uniform Title** fields. It is used from **Easy Word Search** when you click the **Keyword** check box and from **Expert Search** or **Catalog Lookup** when you choose a **keyword** option from the drop-down list. Concourse does not include the words in the **name.ign**, **title.ign**, and **subject.ign** (ignore) files when compiling this index.

### **Subject Headings Index**

This index is built from the **Subject Headings** field. It is used from **Easy Word Search** when you click the **Subject** check box and from **Expert Search** or **Catalog Lookup** when you click one of the **subject** options from the drop-down list. Concourse does not include the words contained in the **subject.ign** (ignore) file when compiling this index.

### **Gift Notes Index**

This index is built from the **Donor**, **In Memory of**, and **In Honor of** fields. It is used from **Easy Word Search** when you click the **Donor** check box and from **Expert Search** or **Catalog Lookup** when you choose **donor** from the drop-down list. Concourse does not include the words contained in the **subject.ign** and the **title.ign** (ignore) files when compiling this index.

The following patron indexes are generated by clicking the **ADMIN** button on the **Navigator Toolbar**. Click the **Maintenance** button on the flow chart and then click **Rebuild Patron Indexes...** from the shortcut menu.

**Note:** If you are not logged in, you can click **File | Maintenance | Rebuild Patron Indexes...** from Concourse's menu bar.

### **Last Name Index**

This index is built from the **Name** field on the **Add/Modify Patrons** dialog box. The name should be entered in **LastName, FirstName** format, so this index includes the text that falls before the comma in this field. It is used from **Patron Lookup** when you select **Patrons' Last Name** from the drop-down list.

### **First Name Index**

This index is built from the **Name** field on the **Add/Modify Patrons** dialog box. This index includes the text that falls after the comma in this field. It is used from **Patron Lookup** when you select **Patrons' First Name** from the drop-down list.

### **Family of Index**

This index is built from the **Family of** field on the **Add/Modify Patrons** dialog box. It is used from **Patron Lookup** when you select **FamilyOf** from the drop-down list.

## Link Index

This index is built from **P-Link** data. It is used from **Patron Lookup** when you select **PLINK** from the **Look for** drop-down list.

## Ignore Files

When Concourse builds the indexes, it automatically omits any words included in the ignore files. These files contain common words such as **an**, **any**, **about**, **at**, etc. There are three ignore files:

- **Name.ign** – a list of words that is ignored when building the **Author** and **KeyWord** indexes.
- **Subject.ign** – a list of words that is ignored when building the **Subject Headings**, **KeyWord**, and **Gift Notes** indexes.
- **Title.ign** – a list of words that is ignored when building the **Title**, **KeyWord**, and **Gift Notes** indexes.

## Modifying an ignore file

If there are additional words that you want to add to any of your ignore lists or words in the file that you do not want ignored, do the following to modify the file:

1. Open your Notepad text editor.
2. Click **File | Open...** from the Notepad menu bar to access the **Open** dialog box.
3. Find your product directory, i.e., the folder where Concourse was installed (**C:\Book Systems, Inc.\Concourse** by default).

**Note:** If you do not know where the program is installed, open Concourse and then click **Help | About Concourse** from the menu bar. The information is displayed in the **Current Directory** section; you do not have to log in to access this dialog box.

4. When you are in your product directory, double-click to open the **Config** folder.
5. From the **Files of type:** drop-down list at the bottom of the dialog box, click **All Files**. Your list should now include all of your **\*.ign** files.

**Note:** If you do not see any file extensions, it may be that your system is configured to hide them. Refer to your Windows documentation for information on how to show file extensions.

6. Double-click the ignore file that you want to open: **name.ign**, **subject.ign**, or **title.ign**. The file you selected opens in Notepad.

**Warning!** The ignore files must be in alphabetical order, so be sure that any words you add are placed correctly.

7. You can now enter any new words that you want to add to the file. You can also delete any of the words that are currently in the file if you do not want them ignored.
8. When you have finished making changes, save the file by clicking **File | Save** from the menu or by pressing **Ctrl + S** on your keyboard.

9. You can close Notepad by clicking the **Close** button  in the upper, right-hand corner of the window.

**Warning!** After you make a modification to any one of the ignore files, you should rebuild your catalog and patron indexes to keep them up-to-date.

## Rebuilding an Index

Sometimes you may find that your records are incorrect. For instance, your ItemID sequencing may be out of order, or errors may occur when you log in. If this occurs, you need to rebuild indexes in order to successfully log in. Refer to the Concourse Help files for more information concerning login errors.

1. Click the **ADMIN** button on the **Navigator** Toolbar.
2. Click the **Maintenance** button on the flow chart.
3. Click one of the following options as applicable:

**Note:** If you are already logged out, you can click **File | Maintenance** from Concourse's menu bar to see the options listed below:

- **Rebuild Catalog Indexes** – rebuilds indexes for item records.
  - **Rebuild Patron Indexes** – rebuilds indexes for patron records.
  - **Rebuild Authority Indexes** (requires license) – rebuilds indexes for authority records.
  - **Rebuild History Indexes** – rebuilds indexes used to review patron, item, and/or worker history files.
  - **Rebuild Message Indexes** – rebuilds indexes used to review messages.
4. Concourse prompts you to log out. Click **Yes** to continue, and the appropriate rebuild dialog box opens. **Waiting for Start** displays above the progress bar.
  5. Click **Start**. The **Close** button toggles to **Stop**, which you can click if you need to abort the process. When the process is finished, the progress bar is completely filled and the **Close** button is available again.

**Note:** If the rebuild process takes an excessive amount of time or if you start rebuilding the wrong indexes, you may click **Stop** to cancel. The **Stop** button becomes disabled when your indexes are completely rebuilt. At that point, you cannot retrieve your old indexes; therefore, if you want to cancel the process, you must do so before the indexes become inaccessible.

6. Click **Close** to exit the dialog box and log into Concourse as usual.

---

## Rebuilding Files

Occasionally when you attempt to log in, Concourse notifies you of an error and prompts you to rebuild certain files. This often occurs after you have done some database cleanup. If you receive this prompt, you cannot log in until you have rebuilt the files. You can rebuild files from the **Maintenance** menu.

## Circulation Files

If you try to check in an item but Concourse shows that it is not checked out, you may attempt to fix the problem by rebuilding your circulation files. You will have to rebuild files if you receive a circulation error message when you are logging in.

**Note:** If you still get the error message after you have rebuilt your files, please contact Book Systems Technical Support Staff for further assistance.

1. Click the **ADMIN** button on the **Navigator** Toolbar.
2. Click the **Maintenance** button on the flow chart.
3. Click **Rebuild Circulation Files....**

**Note:** If you are already logged out, click **File | Maintenance | Rebuild Circulation Files** from Concourse's menu bar.

4. Concourse prompts you to log out. Click **Yes** to open the **Rebuilding Circulation Files** dialog box. **Waiting for Start** displays above the progress bar.

The screenshot shows a dialog box titled "Rebuilding Circulation Files". It features a blue title bar and a light beige background. At the top, the text "Waiting for Start" is displayed above a progress bar. To the right of the progress bar are "Start" and "Close" buttons. Below the progress bar, there are two checked checkboxes: "Rebuild Out List" and "Rebuild Reserves List". To the right of these checkboxes are "From:" and "To:" date fields with values "01/01/1980" and "12/31/2020" respectively. At the bottom, there is a label "Items checked out to deleted patrons" above an empty list box.

5. By default, both check boxes are selected; you may click to deselect them if needed.
  - Click to clear the **Rebuild Out List** check box if you do not want the list of items checked out to be rebuilt.
  - Click to clear the **Rebuild Reserves List** check box if you do not want the list of items on reserve to be rebuilt.
6. If you would like to rebuild your circulation files from a certain range of dates, you can specify the dates in the **From:** and **To:** fields. By default, 01/01/1980 displays in the **From:** field, and 12/31/2020 displays in the **To:** field.

7. Click **Start**. The **Close** button toggles to **Stop**, which you can click if you need to abort the process. When the process is finished, the progress bar is completely filled and the **Close** button is available again.

**Note:** If the rebuild process takes an excessive amount of time or if you start rebuilding the wrong files, you may click **Stop** to cancel. The **Stop** button becomes disabled when your files are completely rebuilt. At that point, you cannot retrieve your old files; therefore, if you want to cancel the process, you must do so before the files become inaccessible.

8. Click **Close** to exit the dialog box and log into Concourse as usual.

## Statistics Files

You may rebuild the statistics files for one of two reasons: if a filtered report does not access information you know exists or if you are prompted to do so.

1. Click the **ADMIN** button on the **Navigator Toolbar**.
2. Click the **Maintenance** button on the flow chart.
3. Click **Rebuild Statistics Files....**

**Note:** If you are already logged out, you can click **File | Maintenance | Rebuild Statistics Files...** from Concourse's menu bar.

4. A confirmation message dialog box opens, stating that you need to be logged out to perform this function. Click **Yes** to open the **Rebuilding Statistics Files** dialog box. **Waiting for Start** displays above the progress bar.
5. Click **Start**. The **Close** button toggles to **Stop**, which you can click if you need to abort the process. When the process is finished, the progress bar is completely filled and the **Close** button is available again.

**Note:** If the rebuild process takes an excessive amount of time or if you start rebuilding the wrong files, you may click **Stop** to cancel. The **Stop** button becomes disabled when your files are completely rebuilt. At that point, you cannot retrieve your old files; therefore, if you want to cancel the process, you must do so before the files become inaccessible.

6. Click **Close** to exit the dialog box and log into Concourse as usual.

---

## Verifying Data

Concourse provides a **Verify** option; however, you should use it only under certain circumstances, most often under the recommendation of the Book Systems Technical Support Staff.

In essence, there are two files for patron and item records, a data file that holds the data, and an ID file; this option verifies that these files match. First, Concourse looks at everything in the ID file and checks it against the data, and second, it reverses the process by looking at everything in the data file to check it against the ID.

1. Click the **ADMIN** button on the **Navigator Toolbar**.
2. Click the **Maintenance** button on the flow chart.

3. Click **Verify....**  
**Note:** If you are already logged out, click **File | Maintenance | Verify** from Concourse's menu bar.
4. Concourse prompts you to log out. Click **Yes** to open the **Verify** dialog box.
5. Click the **Verify Patrons** or **Verify Catalog** radio button to designate which type of data you need to verify.
6. Click to select the appropriate radio button in the **Verify Constraints** section:
  - **Verify Id and Data** – Check both the ID and the data file.
  - **Verify Id only** – Check only the ID file.
  - **Verify Data only** – Check only the data file.
7. Click **Start**. The **Verify Results** dialog box opens.
8. You have three options in this dialog box.
  - **Save As...** – You can save the results to a file for later use. To save the results, specify a file name and location in the **Save As** dialog box, and click **Save**.
  - **E-mail to ...** – You can e-mail the results to Book Systems Technical Support. To e-mail the results, make sure that the resulting **E-mail to** dialog box is completed correctly and click **E-mail**. A message box will open stating that the e-mail has been successfully sent. (Press **F1** on the **E-mail to** dialog box to access the Concourse Help files if you are unsure how to complete the dialog box.).
  - **Close** – Exit the dialog box.

---

## Configuration Settings

You can use the **Configuration Setup** dialog box to quickly select or deselect options such as using **Grade Level** instead of **Marital Status**, using Library of Congress Call Numbers instead of the Dewey system, and more.

1. Click the **ADMIN** button on the **Navigator Toolbar**.
2. Click the **Maintenance** button on the flow chart.
3. Click **Configuration Setup....**
4. Concourse prompts you to log off. Click **Yes** to open the **Configuration Setup** dialog box.
5. Click the check boxes to select or deselect the options you need to change. All options are explained in detail beginning on the next page
6. If you are specifying a barcode length or Call Number derivation length, enter the number in the field provided.
7. If you are changing your GUI for Concourse, click the drop-down button under **Navigation** to open a list of GUI options, and click again to make a selection.
8. Once you have completed your changes, click **Commit Changes** to save your settings. Otherwise, click **Cancel**.

You may log back into Concourse once you have completed your changes. When you log in, all of the new settings you selected are now enabled.

## Configuration Settings

The **Configuration Setup** dialog box contains settings that you can use to make the most of Concourse. Review what each option does so that you can choose the right configuration for how your library operates.

The screenshot shows the 'Configuration Setup' dialog box with the following settings:

- Circulation Parameters:**
  - Auto Review on Patron Lookup
  - Auto Switch Patron
  - Don't Display Message Button
  - Default To Patron Name In Check Out
  - Print Circulation Grid
- Database Parameters:**
  - Use L of C Call Numbers
  - Use LAUSD Call Format
- Maximum Barcode Lengths:**
  - Use Item Barcodes
  - Item Barcode Length: 0
  - Use Patron Barcodes
  - Patron Barcode Length: 0
- MARC Record Parameters:**
  - Ignore Study Prgrms on Import
  - eZhost Item Status Export
  - Clean Tags On Import
  - Export Imported Records
- Display Parameters:**
  - Display Worker's Name
  - Modeless Authority Reports
  - Navigation: Concourse Navigator
- Patron Parameters:**
  - Replace Marital Status with Grade Level
  - Print Name on Address Label: Last, First
- Cataloging Parameters:**
  - Supply default Purchase Date
  - Uppercase Call Numbers
  - Uppercase Subject Headings
  - Uppercase Analytics
  - Display Gift Notes
  - Suppress Call # Generation
  - Call # Derive Length: 3
  - Ctrl-N Recalls Call # Fields
  - Convert from MARC-8 to Latin1

### Circulation Parameters

- **Auto Review on Patron Lookup** – Whenever you look up 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

## Database Parameters

**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.

## Maximum Barcode Lengths

- **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.

## MARC Record Parameters

- **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 owners of 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.

## Display Parameters

- **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.

## Patron Parameters

- **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.

## Cataloging Parameters

- **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 if Call Numbers are Dewey based, 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

## Chapter 12: Bookmobile

Use the Concourse **Bookmobile** feature to import files from an outside source for use in the Main Library. The process can only be performed once a day and only applies to the following **Circulation Desk** transactions:

- Checking Items In/Out
- Renewing Items
- Adding/Canceling Reserves
- Waiving and Assessing Fines
- Recording Paid Fines
- Marking Items Found

**Note:** This feature is available at an additional cost. Contact your Book Systems Account Manager for more information.

---

### Setting up a Bookmobile

Before performing any **Bookmobile** functions, you must install Concourse on the machine that will serve as your library's Bookmobile.

**Note:** The **StartBookmobile.reg** file, located in the main Concourse directory, must be installed on both the main library machine and the Bookmobile machine. Double-click the registry file to save it to your system.

Once Concourse is installed and the registry file is saved, make sure that a Bookmobile location is defined in both the **Location** item class and in the **logins.txt** file. If these locations are not present, the **Bookmobile** options will not be available from the **Review History** dialog box. You should also create a **book** worker record with full permissions to view Bookmobile history.

**Important!** You should perform these actions on your main Concourse machine, and then do a backup and restore it to the Bookmobile machine.

### Bookmobile Location - Item Class

Concourse delivers **Main Library** and **At Circulation Desk** as location item classes. Use the following steps to add a new Bookmobile location.

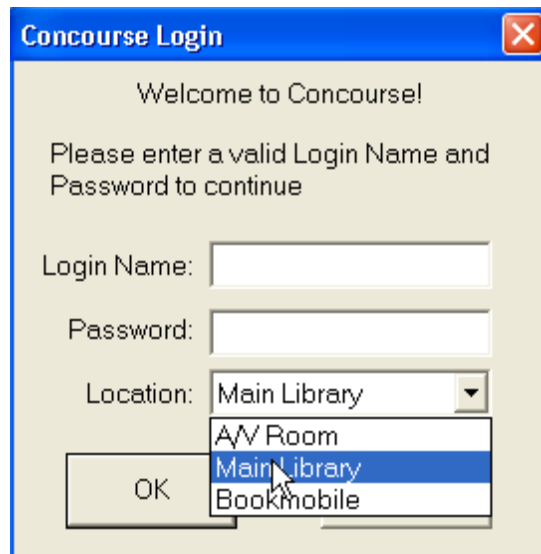
1. Click the **ADMIN** button on the **Navigator Toolbar**.
2. Click the **Add/Modify Item Classes** button on the flow chart to open a shortcut menu.
3. Click **Locations...** to open the **Add/Edit Location** dialog box.
4. Click **Add New Entry**, and a new blank line displays.
5. In the **New Name** column, enter **Bookmobile**.

6. In the **Description** column, briefly describe the purpose of the Bookmobile location.
7. Click **Save Changes**. Concourse prompts you to confirm.
8. Click **Yes** to save your new location.

### Bookmobile Location - Logins.txt

The **logins.txt** file controls the location choices provided on the **Concourse Login** dialog box each time you begin using the product. Depending on the way your Concourse was set up initially, you may or may not have this file, but you can easily create one as needed.

1. Browse to **C:\Book Systems, Inc.\Concourse** where the product is installed.  
**Note:** This is the default location; if your Concourse was installed in a different location, click **Help | About Concourse** from Concourse's menu bar to find the appropriate directory.
2. Open the **Config** folder, find the **logins.txt** file, and double-click to open it.  
**Note:** If you do not see this file, you can create it by opening Notepad, entering your locations as they display in the **Add/Edit Location** dialog box in Concourse, and saving the file as **logins.txt** in your **Config** folder.
3. In the **logins.txt** file, enter **Bookmobile** as it displays in Concourse. For example, in the graphic below Bookmobile is written with an uppercase **B**; therefore, the location item class in Concourse must also have an uppercase **B**.
4. Press **Enter**.
5. When you are finished, click **File | Save**. The next time you log in to Concourse, the new location displays in the **Location:** drop-down list.



### Book Worker

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

2. Click the **Worker Records** button on the flow chart to open the **Edit Worker Records** dialog box.
3. Enter **book** in the **Login Name** field; the rest of the fields/options are now active.
4. Enter a password for this worker in the **Password** and **Confirm Password** fields.
5. Enter initials, such as **bk**, in the **Initials** field.
6. Click **Save**. Concourse prompts you to confirm.
7. Click **Yes** to save the worker record. The record is saved and the fields of the **Edit Worker Records** dialog box are cleared so you can add another worker if needed.


**Important!** Do not forget to backup your Concourse and then restore it to your Bookmobile machine before you begin performing *Bookmobile* transactions. Be sure to perform the backup before any circulation transactions have been done in the *Main Library* Concourse for the day.

---

## Using the Bookmobile


Once you have set up your Bookmobile, you are ready to perform transactions. You can log in to the Bookmobile location, circulate items or perform any other tasks needed, and then save these actions to a **Journal** file, which you can then upload to your main Concourse.



### Performing library tasks at the Bookmobile

1. Open Concourse and log in using the **book** worker under the **Bookmobile** location.
2. Perform actions as needed using other steps in this guide or the Concourse Help files.  
**Tip!** Even if you did not purchase the **Bookmobile** feature, you could record your transactions at a location other than your main library, log in under **Bookmobile**, and perform those transactions in the database. These actions would then be tied to the Bookmobile location.
3. When you are finished, click the **ADMIN** button on the **Navigator Toolbar**.
4. Click the **Review History** button on the flow chart to open the **Review History** dialog box, displaying the Bookmobile actions.  
**Note:** You may have to re-arrange the columns or use the scroll bar in order to see the **Location** column.
5. Insert a disk into your disk drive. All transactions must be saved to a **Journal** file for later export to the main library database.
6. Click the **Save** button  on the dialog's toolbar to store the transactions in the **Journal** file. Once the file is saved successfully, a dialog box displays, stating the number of transactions that were sent to the **Journal** file.
7. Click **OK**.

8. Log out. Refer to the following section to import the information into the main library database.

### Importing to the Main Library

1. Using the main library computer, log in to Concourse under the **Main Library** location.
2. Insert the disk that contains the Bookmobile **Journal** file into your disk drive.
3. Click the **ADMIN** button on the **Navigator Toolbar**.
4. Click the **Review History** button on the flow chart to open the **Review History** dialog box.
5. Click the **Load from Bookmobile** button  on the dialog's toolbar to access the **Open** dialog box.

**Note:** You may see an **Insert Disk** dialog box, prompting you to insert a disk. If so, you can insert a disk or click **Cancel** to access the **Open** dialog box.
6. Click **Journal** from the list of files.
7. Click **Open**. The **Review History** dialog box changes color and is now titled **View Bookmobile Journal File**. All transactions from the Bookmobile are displayed.
8. Click the **Process bookmobile records** button  on the dialog's toolbar to process all transactions. Once a transaction has been successfully processed, it displays in **green**.
9. Use the **Skip Current Record** button  on the dialog's toolbar to skip problem transactions. These are transactions that were invalidly performed from the Bookmobile location, such as **Adding a Patron**.
10. If applicable, a dialog box displays to alert you if an error occurred and a history record will not be processed for some reason. Click **OK**.
11. Once all records have been processed, close the **View Bookmobile Journal File** dialog box.

## Chapter 13: Printing

Concourse enables you to print various reports, receipts, labels, and catalog cards. You can use either a standard or a slip printer for receipts. Most printed material can be previewed before printing actually begins; this can save you time and energy as well as prevent you from wasting paper. To open the **Print Preview** dialog box, click the **Print Preview** button on the toolbar of your report or dialog box or click **File | Print Preview** from Concourse's menu bar. Any adjustments that are necessary can be made simply by clicking **Close** and returning to the appropriate dialog box.

---

### Setting Up a Slip Printer

Receipts can be printed for standard circulation functions, such as checking items in/out and collecting fines.

**Note:** A valid license number is required to activate slip printer functionality. If you would like more information about obtaining a **SLIP** license, please contact your Book Systems Account Manager.

Because Concourse can simultaneously support both a standard and a slip printer, a **Message** dialog box may open when you click **Print**, asking if you would like to print to the "receipt printer." Click **Yes** to use to a slip printer; click **No** to open a **Print** dialog box and use a standard printer.

The first time you attempt to print a receipt to a standard printer, a **Circulation Receipt Information** dialog box opens before the **Print** dialog box. Use this dialog box to specify the information that will be printed on the receipt. If at any time you need to re-access this dialog box, click **File | Page Setup**.

#### To enable slip printing

1. Click **File | Receipt Setup...** from Concourse's menu bar to open the **Receipt Printer Setup** dialog box.  
**Note:** Until you properly configure the slip printer, the **Receipt Printer** dialog box opens each time you begin checking items in or out.
2. If you need to dismiss the dialog box and return to your previous task, click **Cancel**. If you do not use receipt printing, you can click the **Disable Receipt Printing Permanently** check box and then click **OK** to be sure this dialog box does not open again.

**Receipt Printer Setup**

You have entered the receipt printer configuration mode. Please hit cancel if you have entered by mistake, otherwise carry on with the receipt printer configuration.

Canceling will disable receipt printing for the following function.

Disable Receipt Printing Permanently

Configuration

Has Paper Cutter     Has Black & Red Ink    COM Port: COM1

Print Fines     Print Reserves List

Line Width: 40

Header Text:  
Christ's Calling Church  
123 Main Street  
Church, CH 55555  
(555) 555-1234

Note: Make sure each line does not exceed the specified Line Width

Footer Text:

Cancel    OK


3. Define your slip printer hardware using the options in the **Configuration** section:
  - **Has Paper Cutter** – Click to enable automatic cutting of printed receipts. You may use this option only if your slip printer model supports this feature.
  - **Print Fines** – Click to include the patron’s existing fines on circulation receipts.
  - **Has Black & Red Ink** – Click to print both black and red as applicable. Only select this option if your printer supports using color.
  - **Print Reserves List** – Click to print a list of the patron’s currently reserved items.
  - **COM Port:** – Click the drop-down list, and click again to select the communications port to which your printer is attached if you have more than one available.
  - **Line Width:** – Defaults to **40**. Do *not* adjust this value unless directed to do so by a Book Systems Technical Support Specialist.
4. If you want headers and/or footers on your receipts, enter text in the **Header Text:** and/or **Footer Text:** fields; be sure the length does not exceed 40 characters. It is recommended that you enter the name of your library or organization in the header. The header and footer texts are centered on the receipt.
5. Click **OK**.

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## Patron Receipts

You can print receipts for standard circulation functions, such as check in/out and fine collection, using a standard or slip printer (see previous section for instructions to set up your slip printer). If you choose to print receipts to a standard printer, you may choose the information that displays on the receipt.

1. Open the **Circulation Desk** (check out) dialog box, and load the patron.
2. Click **Print...**
3. If you have a slip printer configured, a dialog box displays, asking if you want to print to the receipt printer. Click **Yes** to use a slip printer; click **No** to use a standard printer.

**Note:** A red **X** displays on the **Slip Printer** button  if you do not have a properly connected slip printer. If you have already configured your slip printer and the **X** remains, simply click the button once to remove it.

4. If you are printing to a standard printer (for the first time), the **Circulation Receipt Information** dialog box opens.

**Note:** This dialog box is used to specify the information that is to be printed on the receipt and only displays once for initial settings. If you would like to change these settings at any point, click **File | Page Setup** to open the dialog box.

5. All of the following options are selected by default. Click to disable the check box(es) corresponding to any of the details that you do not want to include on the patron receipt.
  - **Transactions for *Current Date*** – includes all transactions posted to the patron’s account today.
  - **Current Status** – includes the current status of the patron account (fines, overdue items, etc.).
  - **Reserved Items** – includes a list of all items that the patron has on reserve.
6. Click **OK** to save your patron receipt settings and close the dialog box.
7. Click **OK** to print the receipt; otherwise, click **Cancel**.

---

## Due Date Slips

There are many ways to remind patrons of due dates. If you wish to issue due date slips, you may do so quickly and easily from the **REPORTS** flow chart.

1. Click the **REPORTS** button on the **Navigator Toolbar**.
2. Click the **Circulation** button on the flow chart to open a shortcut menu.
3. Click **Due Date Slips** to open the **Print Due Date Slips** dialog box and then select the appropriate date.

**Note:** See the “Entering Dates” section in **Chapter 2** for instructions about using the date field.

4. Click **OK**. A Windows standard **Print** dialog box opens.
5. Click to select the appropriate printer from the drop-down list.

**Note:** If you wish to adjust the print properties of a standard printer, click the **Properties** button from the **Print** dialog box. After you make any necessary changes, click **OK** to return to it.

6. When you are satisfied with the printer, click **OK** to print the due date slips.

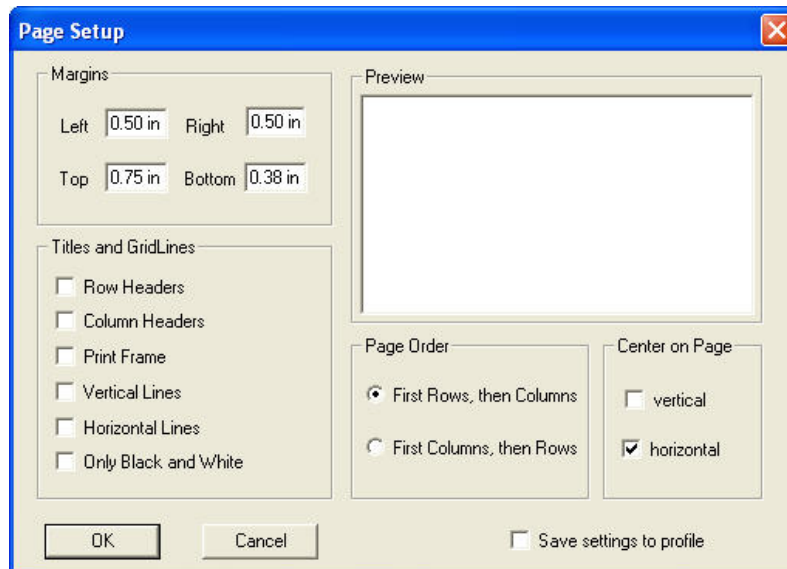
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## Configuring Printed Reports

Before printing a report, you can set its page margins, borders, and colors. The way you configure the page setup of a printed report will vary based on the type of printer that you are using. For instance, you may want to configure the report to print only in black if you are not using a color printer.

1. Build the report that you want to print. The report remains open in its own window while you perform the rest of the steps.

2. Click **File | Page Setup...** from Concourse's menu bar to open the **Page Setup** dialog box.



3. Make your changes to the settings:
  - **Margins** – Define the amount of white space to leave around the edges of the paper in the **Left**, **Right**, **Top**, and **Bottom** fields, in inches.
  - **Titles and GridLines** – Click to select the check boxes corresponding to the options to be included in the printed report. You can see the effect of your changes in the **Preview** box to the right.
    - **Row Headers** – prints the row header column (row numbers).
    - **Column Headers** – prints the column headings (first row).
    - **Print Frame** – prints a frame or box around the report data.
    - **Vertical Lines** – prints the vertical lines (column dividers) of the report grid.
    - **Horizontal Lines** – prints the horizontal lines (row dividers) of the report grid.
    - **Only Black and White** – prints the report in black, eliminating any colors from the headers as well as any user-defined colors for the columns and rows.
  - **Page Order** – Specify how to handle reports that are wider than the page: by first printing all the rows and then the columns or by first printing all the columns and then the rows.
  - **Center on Page** – Specify if you want the report data centered on the page.
    - **vertical** – centers the report vertically on the page, between the top and bottom margins.
    - **horizontal** – centers the report horizontally on the page, between the left and right margins.

4. Click the **Save settings to profile** check box to save your new report printing configuration.

**Note:** Each time you print a report, the **Page Setup** dialog box will show the options you have saved in your profile. Anytime you print a report, you can alter these options, but those changes will not display the next time you print a report unless you save them.

5. Click **OK** when you are finished configuring your settings and are ready to move on to printing the report.

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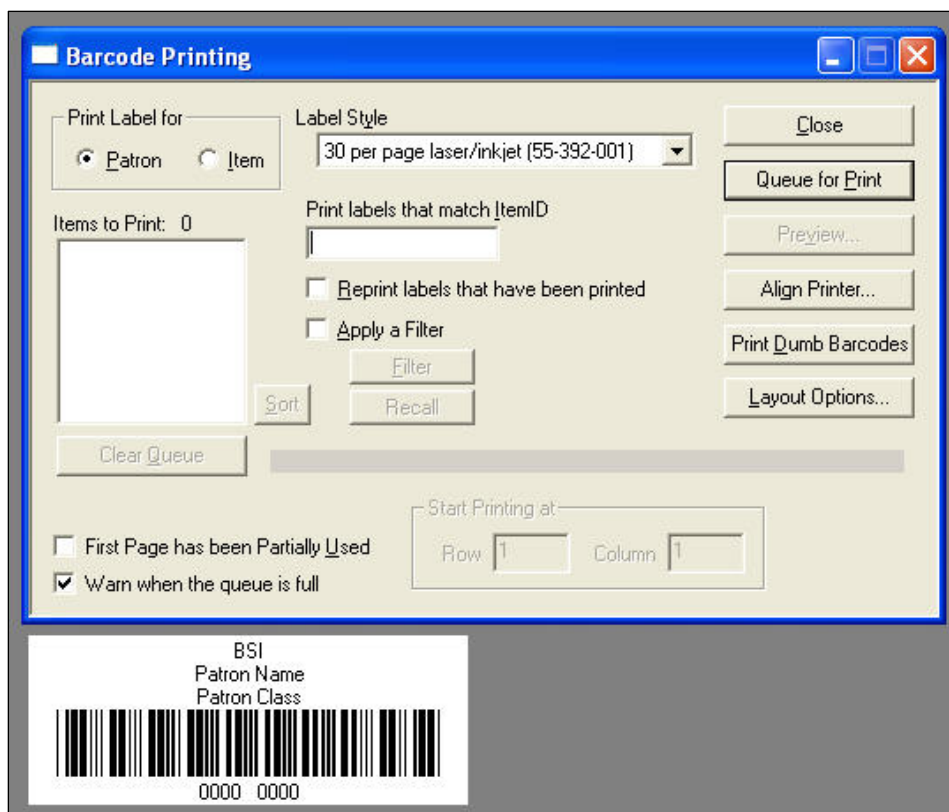
## Barcode Labels

You may order pre-printed barcodes from Book Systems Inc., or if you have purchased a **BARCODE** license, you can print your own barcodes with Concourse. For more information about obtaining a license or about obtaining labels, see the Book Systems Web site or contact your Book Systems Account Manager.

There are two types of barcodes: smart and dumb. Both types of barcodes display the library/organization name, the scanner barcode, and the human readable barcode (numbers). Smart barcodes also include information about the attached item, such as the title, author's name, etc., but dumb barcodes do not because they have not yet been tied to physical items.

### Smart Barcodes

1. Click the **CATALOG** button on the **Navigator Toolbar**.
2. Click the **Print Barcodes** button on the flow chart to open the **Barcode Printing** dialog box. A preview of your barcode label displays.



3. In the **Print Label for** section located at the top of the dialog box, click the **Patron** or **Item** radio button to specify which type of barcodes you need to print.
4. Click the **Label Style** drop-down button, and click again to make a selection.
5. Add records to the **Items to Print:** queue in one of the following ways; the total number of records displays above the queue.

**Note:** If you are printing barcodes that have already been marked as printed on the **Add/Modify Items** (or **Patrons**) dialog box (e.g., if the barcodes have been damaged or torn off), click the **Reprint labels that have been printed** check box; otherwise, you will not be able to queue these records using the first two options below.

- In the **Print labels that match ItemID** field, enter the ID/barcode of the record or range of records you want to print. You can queue a batch of records by using wildcards (see the “Wildcards” section in **Chapter 2**). Click **Queue for Print** to move the specified records in the **Items to Print:** queue.

**Note:** If you leave the **Print labels that match ItemID** field empty and then click **Queue for Print**, every item or patron record in your database is added to the queue.

- Click to select the **Apply a Filter** check box if needed, and the **Build Filter** dialog box opens so you can specify your criteria. If the **Apply a Filter** check box is already selected, click the **Filter** button to open the **Build Filter** dialog box (see the “Build Filter Dialog box” section in **Chapter 2**). This adds any qualifying records from the filter results to your **Items to Print:** queue.
- If you have printed barcodes recently, click the **Recall** button to add those items to the **Items to Print:** queue. If items were already in the queue, a dialog box displays, asking if you want to *replace* what is currently in the queue with data that was previously in the queue. Click **Yes** or **No** as needed.

**Note:** Because the **Warn when the queue is full** check box is selected by default, when you have queued more than one full page of labels to print, a dialog box opens stating that the page is full and asks if you would like to print. If you want to preview the labels, add more items to the queue, specify other print options, or align the printer, click **No**. If you are ready to begin printing, click **Yes** and proceed to step 12.

6. If needed, double-click a record in the print queue to remove it; click the **Clear Queue** button to remove all contents.
7. If you do not intend to print a full page of labels, click the **First Page has been Partially Used** check box to activate the **Start Printing at** section to the right, and enter the position at which you will start printing in the **Row** and **Column** fields.

**Warning!** Reusing printed label sheets can damage your printer’s rollers. Though Concourse can be configured to print partial sheets of labels, we recommend using a new sheet of labels each time you print.

8. If needed, click **Sort** to open the **Advanced Sort** dialog box, where you can set up the order in which your labels will be printed. Use the drop-down lists to select **Primary**, **Secondary**, and **Tertiary** sort criteria, such as ItemID/PatronID, Title, Name, etc. Then, click the **Ascending** or **Descending** radio button, and click **OK**.

**Tip!** If needed, you can add text to your barcodes, change the fonts, and more by changing the barcode layout options. See the “Barcode Layout Options” section later in this chapter for details.
9. Click **Align Printer...** to open the **Printer Alignment** dialog box where you can configure and test your printer alignment to avoid having to reprint your barcode labels. Enter the horizontal and vertical offsets in the appropriate fields; a negative number adjusts the alignment further left or up; a positive number adjusts the alignment further right or down. Change the width of the **Internal Margin** field to specify the distance from the text to the edge of the label. Then click the **Print test pattern** button; be sure you see double lines all around the edge of the printed test pattern. When you have printed a successful test, click **Printer is Aligned** to save your changes and close the dialog box.
10. Once you have all of the options defined, you can preview your labels before you print by clicking **Preview**. The print preview opens in your Concourse window, displaying how your labels will print. This preview will help you decide if you need to make any final adjustments before printing. You can use this feature to preview different **Label Types** to see if there is one that more adequately meets your needs. When you are finished, click **Close** to exit the preview.
11. When you are satisfied with the print settings and are ready to print the labels, click **Print**.
12. A **Print** dialog box opens. Make adjustments specific to your printer as needed, and then click the appropriate button to proceed: **OK** or **Print**, depending on your printer setup.
13. If you do not have enough labels queued to fill up the last page of labels, the **Wasted barcode labels** dialog box displays. This warning tells you how many labels are available per page and how many will be wasted on the last page if you proceed.
  - Click **Print Everything** to print all labels and waste some on the last page (e.g., if there are only 2 to waste and you have no more to print).
  - Click **Print Full Pages Only** to print only the first pages, where no labels will be wasted.
  - Click **Don't Print Anything** to close the dialog box and not print anything.
14. Once labels have been printed, the **Finished Card/Label Printing Options** dialog box opens, where you must click one of the following options:
  - Click **Mark Printed** if you want to mark barcodes as printed on the item/patron records (**Add/Modify Items** or **Add/Modify Patrons** dialog box) and clear them from the queue.

**Note:** If you ever need to reprint these labels (e.g., if labels get damaged or did not print correctly), you must click the **Reprint labels that have been printed** check box on the **Barcode Printing** dialog box. Otherwise, Concourse alerts you that labels have already been printed.

- Click **Clear From Queue** to remove barcodes from the **Items to Print:** queue and close this dialog box; the barcodes will not be marked as printed on the **Add/Modify Items** (or **Patrons**) dialog box (**Other** tab).
- Click **No Action** to close this dialog box without marking items printed or clearing the print queue (e.g., if there was a problem with the printed labels and they must be reprinted).

## Dumb Barcodes

**Note:** You may print dumb barcodes only if you are using 8- or 14-digit barcodes. (A 14-digit barcode includes the 8-digit Concourse item ID number and a check digit in addition to a 4-digit school code.)

1. Click the **CATALOG** button on the **Navigator Toolbar**.
2. Click the **Print Barcodes** button on the flow chart to open the **Barcode Printing** dialog box. A barcode preview label displays.
3. In the **Print Label for** section located at the top of the dialog box, click the **Patron** or **Item** radio button to specify which type of barcodes you need to print.
4. Click the **Label Style** drop-down button, and click again to make a selection.
5. If you do not intend to print a full page of labels, click the **First Page has been Partially Used** check box to activate the **Start Printing at** section to the right, and enter the position at which you will start printing in the **Row** and **Column** fields.

**Warning!** Reusing printed label sheets can damage your printer's rollers. Though Concourse can be configured to print partial sheets of labels, we recommend using a new sheet of labels each time you print.

6. Click **Print Dumb Barcodes**. The **Print Dumb Barcodes** dialog box opens.
7. To ensure uniform printing, templates are assigned to your barcode labels. You can use the default template or specify your own template, using the following symbols: # (number to be incremented) and % (check digit). Concourse reads any other characters, such as letters, numbers, or other special characters as constants. For example, you may have 8-digit barcodes and want to enter your library initials (i.e. MB for Main Branch) as the prefix, followed by five incremental numbers and a check digit. Your template resembles MB#####%.

**Note:** Check digits are optional.

8. Enter the starting and ending numbers for the range of barcodes you want to print.
9. Click **Print**.
10. A **Print** dialog box opens. Make adjustments specific to your printer as needed, and then click the appropriate button to proceed: **OK** or **Print**, depending on your printer setup.

## Barcode Layout Options

Concourse allows you to change the layout of your barcode labels as needed. By default, your organization/library name and the human-readable form of the barcode (numerals) display on the printed label. With smart barcodes, the title and author of each item also displays. You can choose not to display any of this information, or you can add other data to your labels.

1. Click the **CATALOG** button on the **Navigator Toolbar**.
2. Click the **Print Barcodes** button on the flow chart to open the **Barcode Printing** dialog box.
3. From the **Barcode Printing** dialog box, click **Layout Options...** to open the **Barcode Layout Options** dialog box.
4. If needed, click to deselect the **Display Organization Name** or **Display Human Readable** check boxes if you do not want to include the information on your printed labels. Both options are selected by default.
5. Next to **Data Field 1-4**, click the appropriate drop-down button, and click again if you need to change the type of data printed on your labels. Choices include title, author, age group, Call Number, donor, and more; these only apply to smart barcodes because dumb barcodes are not yet assigned to physical items in your library.
6. To change how each piece of data is aligned on the barcode label, click the appropriate drop-down button next to the field (says **Centered** by default).
7. To change the font of any data printed on your labels, click the corresponding **Font...** button to open the **Font** dialog box. Click to change your font, style, size, effects, and/or color of your text as needed. The **Sample** section previews your choices. When you are finished, click **OK** to return to the **Barcode Layout Options** dialog box; otherwise, click **Cancel** to discard your changes.
8. In the **Number of Digits** section in the lower left corner, click the appropriate radio button to tell the printer if you are printing **8-** or **14-digit** barcodes. A 14-digit barcode includes the 8-digit Concourse ItemID number and a check digit in addition to a 4-digit school code.
9. In the **Human Readable on** section in the lower right corner, click the **Top** or **Bottom** radio button to specify where the barcode numerals should be printed.  
**Note:** This choice concerns the barcode number only. If you are displaying your organization name, it displays above the barcode. Choosing **Top** puts the human-readable barcode number above the barcode and below the organization name. Choosing **Bottom** puts the human-readable barcode number below the barcode.
10. When you finish determining your layout options, click **Ok** to return to the **Barcode Printing** dialog box.

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## Spine and Pocket Labels

1. Click the **CATALOG** button on the **Navigator Toolbar**.
2. Click the **Print Labels** button to open the **Catalog Label Printing/Preview** dialog box.
3. Click the **Label** drop-down button, and click again to select the type of label you need. For more information on label types, please refer to the **Label Choices** Help topic.
4. Add item records to the **Items to Print:** queue in one of the following ways; the total number of items displays above the queue.

**Note:** If you are printing labels that have already been marked as printed on the **Add/Modify Items** dialog box (e.g., if the labels have been damaged or torn off), click the **Reprint labels that have been printed** check box; otherwise, you will not be able to queue these items using the first two options below.

- In the **Print labels that match ItemID** field, enter the ID/barcode of the item or range of items you want to print. You can queue a batch of items by using wildcards (see the “Wildcards” section in **Chapter 2**). Click **Queue for Print** to move the specified items in the **Items to Print:** queue.

**Note:** If you leave the **Print labels that match ItemID** field empty and then click **Queue for Print**, every item record in your database is added to the queue.

- Click to select the **Apply a Filter** check box if needed, and the **Build Filter** dialog box opens so you can specify your criteria. If the **Apply a Filter** check box is already selected, click the **Filter** button to open the **Build Filter** dialog box (see the “Build Filter Dialog box” section in **Chapter 2**). This adds any qualifying records from the filter results to your **Items to Print:** queue.
- If you have printed labels recently, click the **Recall** button to add those items to the **Items to Print:** queue. If items were already in the queue, a dialog box displays, asking if you want to *replace* what is currently in the queue with data that was previously in the queue. Click **Yes** or **No** as needed.

**Note:** Because the **Warn when the queue is full** check box is selected by default, when you have queued more than one full page of labels to print, a dialog box opens stating that the page is full and asks if you would like to print. If you want to preview the labels, add more items to the queue, specify other print options, or align the printer, click **No**. If you are ready to begin printing, click **Yes** and proceed to step 11.

5. If needed, double-click a record in the print queue to remove it; click the **Clear Queue** button to remove all contents.
6. If you do not intend to print a full page of labels, click the **First Page has been Partially Used** check box to activate the **Start Printing at** section to the right, and enter the position at which you will start printing in the **Row** and **Column** fields.

**Warning!** Reusing printed label sheets can damage your printer's rollers. Though Concourse can be configured to print partial sheets of labels, we recommend using a new sheet of labels each time you print.

7. Choose your preferences for the remaining options on the **Catalog Label Printing/Preview** dialog box as applicable:
  - Click the **Horizontal position of spine text** drop-down button, and click again to specify how the spine text is to be justified horizontally: **Centered**, **Left Justified**, or **Right Justified**.
  - Click the **Vertical position of spine text** drop-down button, and click again to specify how the spine text should be positioned vertically: **Center**, **Top**, or **Bottom**.
  - Click the **Double-space spine label text** check box to include a blank line between each line of text. Leave the check box deselected to single-space the spine label text (do not include blank lines).
  - Click the **Include Cost on Pocket label** check box if you want to print the item cost on the pocket label; leave the check box deselected to omit the item cost from the label.
  - Click the **Skip items with no Call Number** check box if you want to skip printing of items without a Call Number; leave the check box deselected to print items whether or not a Call Number is present.
  - Click the **Print Study Program Labels** check box to include study program information on your spine and pocket labels. Selecting this check box enables the **Only Print Study Program Labels** check box; click to tell Concourse to print spine and pocket labels only for items with study program information in their records.
  - Click **Spine Font...** to open the **Font** dialog box. Click to change your font, style, size, effects, and/or color as needed. The **Sample** section previews your choices. When you are finished, click **OK** to save and close; otherwise, click **Cancel** to discard your changes.
  - Click **Pocket Font...** to open the **Font** dialog box. Click to change your font, style, size, effects, and/or color as needed. The **Sample** section previews your choices. When you are finished, click **OK** to save and close; otherwise, click **Cancel** to discard your changes.
  - If needed, click **Sort** to open the **Advanced Sort** dialog box, where you can set up the order in which your labels will be printed. Use the drop-down lists to select **Primary**, **Secondary**, and **Tertiary** sort criteria, such as ItemID, Title, Author, etc. Then, click the **Ascending** or **Descending** radio button, and click **OK**.

8. Click **Align Printer...** to open the **Printer Alignment** dialog box where you can configure and test your printer alignment to avoid having to reprint your labels. Enter the horizontal and vertical offsets in the appropriate fields; a negative number adjusts the alignment further left or up; a positive number adjusts the alignment further right or down. Change the width of the **Internal Margin** field to specify the distance from the text to the edge of the label. Then click the **Print test pattern** button; be sure you see double lines all around the edge of the printed test pattern. When you have printed a successful test, click **Printer is Aligned** to save your changes and close the dialog box.
9. Once you have all of the options defined, you can preview your labels before you print, by clicking **Preview**. The print preview opens in your Concourse window, displaying how your labels will look. This preview will help you decide if you need to make any final adjustments before printing. You can use this feature to preview different **Label Types** to see if there is one that more adequately meets your needs. When you have finished looking at your labels, click **Close** to exit the preview.
10. When you are satisfied with the print settings and are ready to print the labels, click **Print**.
11. A **Print** dialog box opens. Make adjustments specific to your printer as needed, and then click the appropriate button to proceed: **OK** or **Print**, depending on your printer setup.
12. If you do not have enough labels queued to fill up the last page of labels, the **Wasted labels** dialog box displays. This warning tells you how many labels are available per page and how many will be wasted on the last page if you proceed.
  - Click **Print Everything** to print all labels and waste some on the last page (e.g., if there are only 2 to waste and you have no more to print).
  - Click **Print Full Pages Only** to print only the first pages, where no labels will be wasted.
  - Click **Don't Print Anything** to close the dialog box and not print any labels.
13. Once labels have been printed, the **Finished Card/Label Printing Options** dialog box opens, where you must click one of the following options:
  - Click **Mark Printed** if you want to mark labels as printed on the item records (**Add/Modify Items** dialog box) and clear them from the queue.

**Note:** If you ever need to reprint these labels (e.g., if labels get damaged or did not print correctly), you must click the **Reprint labels that have been printed** check box on the **Catalog Label Printing/Preview** dialog box. Otherwise, Concourse alerts you that labels have already been printed.
  - Click **Clear From Queue** to clear the **Items to Print:** queue and close this dialog box; the labels will not be marked as printed on the **Add/Modify Items** dialog box (**Other** tab).

- Click **No Action** to close this dialog box without marking items printed or clearing the print queue (e.g., if there was a problem with the printed labels and they must be reprinted).

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## Catalog Cards

You can also print catalog cards for your items from the **CATALOG** flow chart in Concourse.

1. Click the **CATALOG** button on the **Navigator Toolbar**.
2. Click the **Print Catalog Cards** button on the flow chart to open the **Catalog Card Printing/Preview** dialog box.
3. Click the **Card Type** drop-down button, and click again to select the card stock you want to use.
4. Add item records to the **Items to Print:** queue in one of the following ways; the total number of items displays above the queue.

**Note:** If you are printing cards that have already been marked as printed on the **Add/Modify Items** dialog box (e.g., if the cards have been damaged), click the **Reprint cards that have been printed** check box; otherwise, you will not be able to queue these items.

- In the **Print cards that match ItemID** field, enter the ID/barcode of the item or range of items you want to print. You can queue a batch of items by using wildcards (see the “Wildcards” section in **Chapter 2**). Click **Queue for Print** to move the specified items to the **Items to Print:** queue.

**Note:** If you leave the **Print cards that match ItemID** field empty, and then select **Queue for Print**, the first 2000 item records in your database are added to the queue.

- Click to select the **Apply a Filter** check box if needed, and the **Build Filter** dialog box opens so you can specify your criteria. If the **Apply a Filter** check box is already selected, click the **Filter** button to open the **Build Filter** dialog box (see the “Build Filter Dialog box” section in **Chapter 2**). This adds the first 2000 qualifying item records from the filter results to your **Items to Print:** queue.
  - If you have printed cards recently, click the **Recall** button to add those items to the **Items to Print:** queue. If items were already in the queue, a dialog box displays, asking if you want to *replace* what is currently in the queue with data that was previously in the queue. Click **Yes** or **No** as needed.
5. If needed, double-click a record in the print queue to remove it; click the **Clear Queue** button to remove all contents.
  6. Choose your preferences using the check boxes and buttons on the **Catalog Card Printing/Preview** dialog box as applicable:
    - Click **Print Main Entry Card** to print the first card in the set.
    - Click **Extra main entry card** to print two (2) copies of the main entry card (Call Number card) for each item queued.

- Click **Print full card set** to print a full set of catalog cards that exist for each item, including subject heading and title cards.
  - Click **Print Notes On Card** if you want the information in the **Note** and **Summary** fields of the **Analytics** tab of the record printed on each card in the set.
  - Click **Print Summary On Card** if you want the item summary to display on each card in the set.
  - Click **Print ISBN On Card** if you want the ISBN number of each item to display on each card in the set.
  - Click the **Skip items with no Call Number** check box if you want to skip items with no Call Number; leave the check box deselected to print items whether or not a Call Number is present.
  - Click the **Print Barcode On Card** check box to print the item's barcode on each card.
  - Click the **Use Dot Matrix Target** check box to insert a target for you to use to align your cards when using a dot matrix printer to print your catalog cards.
  - Click the **Change Font...** button to open the **Font** dialog box. Click to change your font, style, size, effects, and/or color as needed. The **Sample** section previews your choices. When you are finished, click **OK** to save and close; otherwise, click **Cancel** to discard your changes.
  - If needed, click the **Sort** button to open the **Advanced Sort** dialog box, where you can set up the order in which your cards will be printed. Use the drop-down lists to select **Primary**, **Secondary**, and **Tertiary** sort criteria, such as ItemID, Title, Author, etc. Then, click the **Ascending** or **Descending** radio button, and click **OK**.
7. Click **Align Printer...** to open the **Printer Alignment** dialog box where you can configure and test your printer alignment to avoid having to reprint your cards. Enter the horizontal and vertical offsets in the appropriate fields; a negative number adjusts the alignment further left or up; a positive number adjusts the alignment further right or down. Change the width of the **Internal Margin** field to specify the distance from the text to the edge of the label. Then click the **Print test pattern** button; be sure you see double lines all around the edge of the printed test pattern. When you have printed a successful test, click **Printer is Aligned** to save your changes and close the dialog box.
  8. Once you have all of the options defined, you can preview your cards before printing by clicking **Preview**. The print preview opens in your Concourse window, displaying how your cards will print. This preview will help you decide if you need to make any final adjustments before printing. You can use this feature to preview different **Card Types** to see if there is one that better suits your needs. When you have finished looking at your cards, click **Close** to exit the preview.
  9. When you are satisfied with the print settings and are ready to print the cards, click **Print**.
  10. A **Print** dialog box opens. Make adjustments specific to your printer as needed, and then click the appropriate button to proceed: **OK** or **Print**, depending on your printer setup.

11. When the **Finished Card/Label Printing Options** dialog box opens, select the appropriate action to proceed:
  - Click **Mark Printed** if you want to mark cards as printed on the item records (**Add/Modify Items** dialog box) and clear them from the queue.  
**Note:** If you ever need to reprint these cards (e.g., if they get damaged or did not print correctly), you must click the **Reprint cards that have been printed** check box on the **Catalog Card Printing/Preview** dialog box. Otherwise, Concourse alerts you that cards have already been printed.
  - Click **Clear From Queue** to clear the **Items to Print:** queue and close this dialog box; the cards will not be marked as printed on the **Add/Modify Items** dialog box (**Other** tab).
  - Click **No Action** to close this dialog box without marking cards printed or clearing the print queue (e.g., if there was a problem with the printed cards and they must be reprinted).

---

## Donor Labels

Patrons may have donated items to your library in honor or in memory of a loved one or friend. To acknowledge their generosity, you can print donor labels for the donated items. This displays the honoree and donor's name. Concourse allows you to print those donor labels as easily as you would your barcode or spine and pocket labels.

1. Click the **CATALOG** button on the **Navigator Toolbar**.
2. Click the **Print Bookplates** button on the flow chart to open the **Print Donor Labels** dialog box. A preview of the label displays on the left side, and all the options for queuing items and formatting your labels are on the right and bottom.
3. If a name is not already given in the **Organization Name** field, enter the name of your library. You can also use this field to give the name of separate sections of your library should a patron donate an item to a particular part of your collection, such as your genealogy room.
4. Add item records to the print queue in one of the following ways:
  - In the **Print items that match ItemID** field, enter the ID/barcode of the item or range of items you want to print. You can queue a batch of items by using wildcards (see the "Wildcards" section in **Chapter 2**). Click **Queue for Print** to move the specified items in the print queue.  
**Note:** If you leave the **Print items that match ItemID** field empty, and then select **Queue for Print**, the first 2000 item records that have been marked as donated in your database are added to the queue.
  - Click to select the **Apply a Filter** check box if needed, and the **Build Filter** dialog box opens so you can specify your criteria. If the **Apply a Filter** check box is already selected, click the **Filter** button to open the **Build Filter** dialog box (see the "Build Filter Dialog box" section in **Chapter 2**). This adds any qualifying items from the filter results to your print queue.

- If you have printed labels recently, click the **Recall** button to add those items to the queue. If items were already in the queue, a dialog box displays, asking if you want to *replace* what is currently in the queue with data that was previously in the queue. Click **Yes** or **No** as needed.

**Note:** If you specify a record that is not marked as donated, a message displays asking you to select another value.

5. If needed, double-click a record in the print queue to remove it; click the **Clear Queue** button to remove all contents.
6. If needed, click **Sort** to open the **Advanced Sort** dialog box, where you can set up the order in which your labels will be printed. Use the drop-down lists to select **Primary**, **Secondary**, and **Tertiary** sort criteria, such as ItemID, Title, Author, etc. Then, click the **Ascending** or **Descending** radio button, and click **OK**.
7. If you prefer to use a different term for someone who makes a donation to your library, click the **Donor** button to open the **Display Constant Text Definition** dialog box. Enter a new term for the donor (such as Benefactor).
8. If you prefer to use different names for instances where items are donated in honor or memory of someone, click the appropriate **In Honor of** or **In Memory of** button to open the **Display Constant Text Definition** dialog box, and enter a new term.
9. To change the font of specific information printed on your labels, click the corresponding **Font** button to open the **Font** dialog box. Click to change your font, style, size, effects, and/or color of your text as needed. The **Sample** section previews your choices. When you are finished, click **OK** to return to the **Print Donor Labels** dialog box; otherwise, click **Cancel** to discard your changes.
10. To change the font of *all* information printed on your labels, click the **Constants Font** button to open a **Font** dialog box and repeat the steps above.
11. To set up your label pages for printing, click the **Page Setup** button to open the **Type of Label to Print** dialog box.
  - Click **One label per page (Dot Matrix)** or **Six labels per page (Laser/Bubble Jet)**. Choosing the one label per page option disables the other options on this dialog box.
  - If you chose the six labels per page option and are using a brand new page of labels, click the **Full Page of Same Labels** check box at the bottom to tell Concourse that you are using a new page. The options in the second section of the dialog box are disabled.
  - If you chose the six labels per page option and are using a sheet of labels that were previously used, click the label position to start printing from: **Top left**, **Top right**, **Middle left**, **Middle right**, **Bottom left**, or **Bottom right**.

**Warning!** Reusing printed label sheets can damage your printer's rollers. Though Concourse can be configured to print partial sheets of labels, we recommend using a new sheet of labels each time you print.
12. Once you have configured all options as needed, click **OK** to return to the **Print Donor Labels** dialog box.

13. Click **Align Printer** to open the **Printer Alignment** dialog box where you can configure and test your printer alignment to avoid having to reprint your labels. Enter the horizontal and vertical offsets in the appropriate fields; a negative number adjusts the alignment further left or up; a positive number adjusts the alignment further right or down. Change the width of the **Internal Margin** field to specify the distance from the text to the edge of the label. Then click the **Print test pattern** button; be sure you see double lines all around the edge of the printed test pattern. When you have printed a successful test, click **Printer is Aligned** to save your changes and close the dialog box.
14. To see a specific donor card in the preview on the left, click the barcode in the print queue. To preview your entire sheet of labels, click **Preview**. The print preview opens in your Concourse window, displaying how your labels will print. When you have finished looking at your labels, click **Close** to exit the preview.
15. To print your donor labels, click the **Print** button.
16. A **Print** dialog box opens. Make adjustments specific to your printer as needed, and then click the appropriate button to proceed: **OK** or **Print**, depending on your printer setup.
17. Concourse prompts you to clear the queue once printing is done. Click **Yes** if you want to clear the queue or **No** if you want to keep the current labels in the queue. You can reprint these labels only if you do not add any new labels to your queue.

---

## Patron Address Labels

The **Print Patron Address Labels** feature allows you to print labels to attach to envelopes before sending form letters to your patrons.

1. Click the *text* on the **PATRON** button on the **Navigator Toolbar** to open a shortcut menu.
  2. Click **Print | Address Labels** to open the **Patron Label Printing/Preview** dialog box.
  3. Click the **Label Type** drop-down button, and click again to select the type of label that you want to use.
  4. Add patron records to the **Items to Print:** queue in one of the following ways; the total number of labels is displayed just above the queue.
    - In the **Print labels that match PatronID** field, enter the ID/barcode number of the patron or range of patrons for which you want to print labels. You can batch print labels by using wildcard characters (see the “Wildcards” section in **Chapter 2**). Click **Queue for Print** to move the specified patron records in the **Items to Print:** queue.
- Note:** If you leave the **Print labels that match PatronID** field empty and then click **Queue for Print**, the first 2000 patron records in your database are added to the queue.

- Click to select the **Apply a Filter** check box if needed, and the **Build Filter** dialog box opens so you can specify your criteria. If the **Apply a Filter** check box is already selected, click the **Filter** button to open the **Build Filter** dialog box (see the “Build Filter Dialog box” section in **Chapter 2**). Any qualifying patron records in the filter results are added to your **Items to Print:** queue.
  - If you have printed labels recently, click the **Recall** button to add those records to the **Items to Print:** queue. If records were already in the queue, a dialog box displays, asking if you want to *replace* what is currently in the queue with data that was previously in the queue. Click **Yes** or **No** as needed.
5. When you have queued more than one full page of labels to print, a dialog box displays, stating that the page is full and asking if you would like to print. If you want to preview the labels, add more patron records to the queue, specify other print options, or align the printer, click **No**. If you are ready to begin printing, click **Yes** and proceed to step 10.
  6. Choose your preferences on the **Patron Label Printing/Preview** dialog box as applicable:
    - Click the **Label Font...** button to open the **Font** dialog box. Click to change your font, style, size, effects, and/or color as needed. The **Sample** section previews your choices. When you are finished, click **OK** to save and close; otherwise, click **Cancel** to discard your changes.
    - If needed, click **Sort** to open the **Advanced Sort** dialog box, where you can set up the order in which your labels will be printed. Use the drop-down lists to select **Primary**, **Secondary**, and **Tertiary** sort criteria, such as Address, PatronID, Patron Name, etc. Then, click the **Ascending** or **Descending** radio button, and click **OK**.
    - If you have one partial page of labels, click the **First Page has been Partially Used** check box. The **Start printing first page at** section activates. Specify the **Row** and **Column** position of the first label available for print.

**Warning!** Reusing printed label sheets can damage your printer’s rollers. Though Concourse can be configured to print partial sheets of labels, we recommend using a new sheet of labels each time you print.
  7. Click **Align Printer...** to open the **Printer Alignment** dialog box where you can configure and test your printer alignment to avoid having to reprint your labels. Enter the horizontal and vertical offsets in the appropriate fields; a negative number adjusts the alignment further left or up; a positive number adjusts the alignment further right or down. Change the width of the **Internal Margin** field to specify the distance from the text to the edge of the label. Then click the **Print test pattern** button; be sure you see double lines all around the edge of the printed test pattern. When you have printed a successful test, click **Printer is Aligned** to save your changes and close the dialog box.

8. Once you have all of the options defined, you can preview your labels before you print by clicking **Preview**. The print preview opens in your Concourse window, displaying how your labels will print. This preview will help you decide if you need to make any final adjustments before printing. You can use this feature to preview different **Label Types** to see if there is one that better suits your needs. When you have finished looking at your labels, click **Close** to exit the preview.
9. When you are satisfied with the print settings and are ready to print the labels, click **Print**.
10. A **Print** dialog box opens. Make adjustments specific to your printer as needed, and then click the appropriate button to proceed: **OK** or **Print**, depending on your printer setup.
11. If you do not have enough labels queued to fill up the last page, the **Wasted labels** dialog box displays. This warning tells you how many labels are available per page and how many will be wasted if you proceed.
  - Click **Print Everything** to print all labels and waste some on the last page (e.g., if there are only 2 to waste and you have no more to print).
  - Click **Print Full Pages Only** to print only the first pages, where no labels will be wasted.
  - Click **Don't Print Anything** to close the dialog box and not print any labels.
12. When the **Finished Card/Label Printing Options** dialog box opens, select the appropriate action to proceed.
  - Click **Mark Printed** if you want to mark labels as printed on the patron records (**Add/Modify Patrons** dialog box) and clear them from the queue.
  - Click **Clear From Queue** to clear the **Items to Print:** queue and close this dialog box; the labels will not be marked as printed on the **Add/Modify Patrons** dialog box.
  - Click **No Action** to close this dialog box without marking labels printed or clearing the print queue (e.g., if there was a problem with the printed labels and they must be reprinted).

## Chapter 14: P-Link

**Patron Link**, or **P-Link**, allows you to import patron records into your database. Rather than manually add each individual record into your database, you can use **P-Link** to set up a profile and then import your patron information. You can use this feature multiple times, with multiple files.

**Important!** You must have a **PLINK** license to use this feature. You can check your licenses when you click **Help | Licenses** in Concourse. If you would like more information about acquiring a license, contact your Book Systems Account Manager.

In Concourse, all you need to do is define your Patron Classes and then you are ready to use **P-Link** to quickly add or update patron information. Follow the instructions on the following pages to make this task simple and efficient.

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### Basic steps

This guide breaks down the process of importing patrons into manageable steps to prevent any problems that you might encounter while using **P-Link**.

Importing patron information with **P-Link** comprises six basic steps:

1. Configure your Patron Classes.
2. Open the **PLink (Patron Importer)** dialog box.
3. Find your import file and determine the file type (in plain text editor like Notepad).
4. Look at the **P-Link** import profiles provided and select an appropriate choice.
5. Edit the import profile if needed.
6. Start import.

---

### Configuring Patron Classes

Before you begin importing patron information into Concourse, you need to configure your Patron Classes. Once configured, **P-Link** sorts your imported patrons into the appropriate classes when you add them to your database.

If you are a new Concourse user and you have not yet added your Patron Classes to your database, see the “Patron Classes” section in **Chapter 3**. If you have already completed this step you can move on to the next section, “Configuring P-Link.”

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## Configuring P-Link

P-Link is accessible via the **PATRON** flow chart on the **Concourse Navigator**. Simply click the **PATRON** button on the **Navigator Toolbar**, and then click **P-Link** to open the **PLink (Patron Importer)** dialog box.

**PLink (Patron Importer)**

1. Specify the path and name of the file you wish to import from  
Import File:
2. Specify, create, or edit the profile needed to parse the import file  
Profile:
3. Skip forward in import file past items you may have already loaded  
Skip  records before starting import
4. Decide if you wish to replace the existing patron if an imported patron has the same plink value. Clicking on the box below indicates you do wish to replace.  
 Replace Patrons if there is a conflict       Merge Existing Patrons
5. Decide if you wish to supply a PatronID to patrons without one, or to reject any patrons without one.  
 Supply PatronID
6. (Optional) Set the time interval for PLink to attempt to import the specified file. At every time interval, PLink will check to see if the import file has changed and if it has, will then import it using the above profile.  
Time Interval: every    When File Changes

Run PLink at Startup of Concourse

The dialog box breaks the task of importing patrons down into steps. Each numbered section of the box refers to a specific step in the import process.

1. In the **Import File:** field, enter the location of your import file, or click the **Browse** button to access the **Open** dialog box and find your file.
2. Do one of the following to upload a profile in the **Profile:** field, and then click the **Test Profile** button to open the **Test PLink Profile** dialog box, which displays what your patron information will look like when it is imported.
  - Enter the location of your profile in the **Profile:** field, or click the **Browse** button to access the **Open** dialog box and find your file.

- Click the **Edit Profile** button to open the **Edit** dialog box where you can create a new profile or modify an existing profile to correlate with the patron file you are importing, i.e., the profile should reference the type of data and the accurate location of data in the import file. If you did not upload a file location in the **Profile:** field, the **Edit** dialog box is blank so you can create a new profile; otherwise, if you did upload a file location, the **Edit** dialog box contains the contents of that file for you to modify.
3. If you want Concourse to skip some of the records in the import file because they were already loaded, enter the number Concourse should ignore in the **Skip {number} records before starting import** field.
  4. Specify how Concourse should handle instances where an imported patron's PLink value matches an existing patron:
    - Click the **Replace Patrons if there is a conflict** check box if there is duplicate patron information, and you would like to replace the existing data with the newly imported data.
    - Click the **Merge Existing Patrons** check box if you want to *add* new information to existing patron records, but you do *not* want to overwrite existing information. This will prevent you from accidentally changing important data in your patron records.
  5. If you want P-Link to automatically assign patron IDs to records that do not have them, click the **Supply PatronID** check box. Use this option if you would like to provide a patron ID for records without one.

**Important!** If you *do not* select the **Supply PatronID** option, patron records without IDs will *not* be imported into the database. Instead, they will be stored in the **PatronRejects.001** file in the product directory. If you want this file to contain only rejects from the current import, leave the check box deselected and delete the previous file before beginning your import.

6. If needed, you can choose one of two options for your **Automatic Import**:
  - To run the import at a certain time, specify a number in the first field of the **Time Interval** line and specify a quantity of time in the second field, e.g., you could enter **every 24 hours**.
  - To run the import any time the file specified in the **Import File:** field changes, click the **When File Changes** check box.

**Note:** The automatic import works much the same way as a manual import. At the interval, Concourse looks at the path given for the import file. If the path is found, its extension is automatically changed to **.tmp**. The file is renamed in this manner so that it can be placed in the same folder as the original file without overwriting it. The import is performed in the background and the only way that the worker will know that the P-Link feature is being utilized is if an error occurs or if the worker is prompted to specify a Patron Class. Once the import is complete, a history action is logged along with the number of records imported and/or rejected.

7. Click the **Run PLink at Startup of Concourse** check box to begin the P-Link process every time you start Concourse, or leave the check box deselected to use P-Link at your discretion.
8. When you are finished making changes on the **PLink (Patron Importer)** dialog box, do one of the following:
  - Click the **Import** button to proceed with the patron import.
  - Click the **Save and Exit** button to keep your changes but import the patron data later.
  - Click the **Cancel Changes** button to close the dialog box without keeping your changes.

---

## Types of Data Files

Now that you have learned about the **PLink (Patron Importer)** dialog box, you can learn more about the actual data files that P-Link works with to import your patron information into Concourse. The type of data file that you work with when using P-Link will determine what kind of patron profile you will need to create or edit before you can move on to initiating the import.

P-Link can use the following types of files:

- **Quotes and Commas** are usually generated by word processing applications. They surround fields with quotes and separate them with commas. P-Link can handle files that consist of quoted fields, non-quoted fields, or both.
- **Fixed Length Records** are usually generated by databases. Both the size of the record and each field it contains are limited to a specific number of characters.
- **Variable Length Records** are usually associated with UNIX-based systems. They use non-data characters, such as tabs, to separate the data fields.

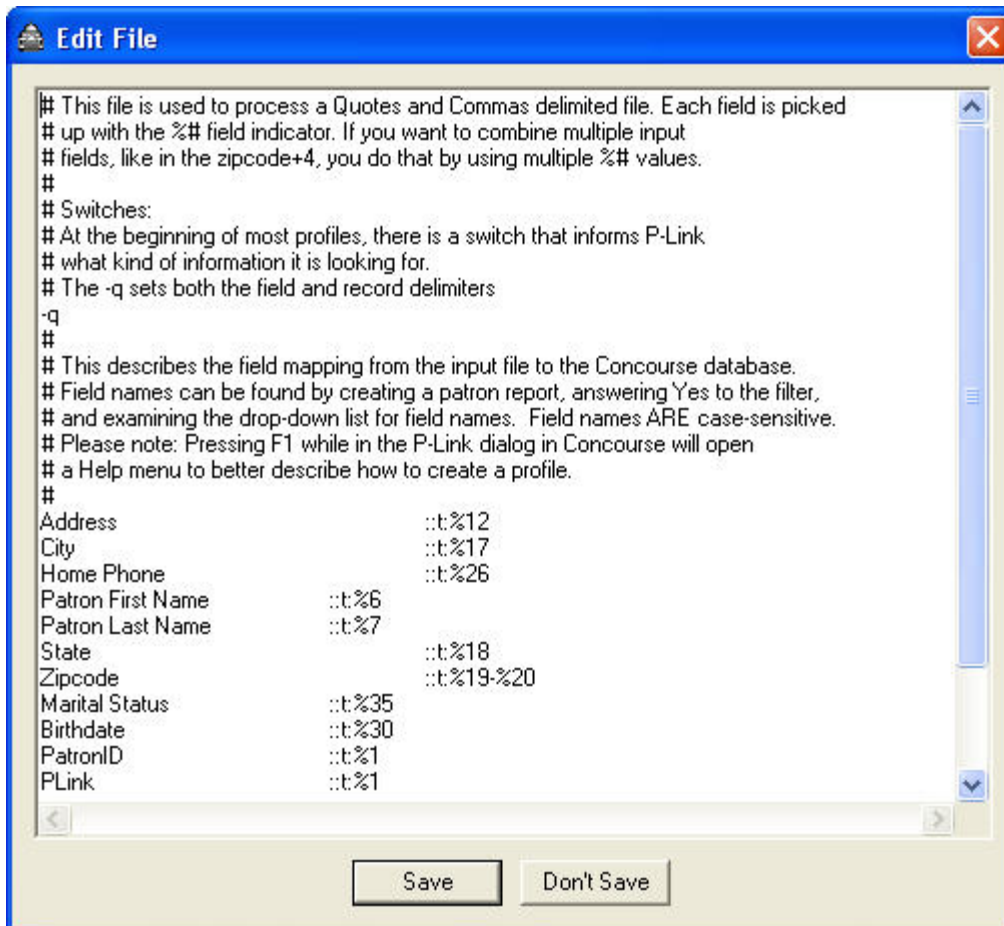
**Note:** You can open import files in any text editor (such as Notepad, Wordpad, or Microsoft Word) to find out which type of file you have. Once you have determined your file type, you can follow the correct set of steps in this chapter.

### Quotes and Commas

In a **Quotes and Commas** file, the quotation marks and commas are used as field separators. The punctuation tells Concourse where one field begins and the other ends; a tag tells Concourse to remove the quotes and commas and sort the remaining data.

```
"Kelly, Thomas", "345 Cedar  
St.", "Watertown", "NY", "13601", "02/14/1972", "256-555-2345"  
"Bates, Tiffany", "999 White  
Way", "Schnectady", "NY", "13789", "12/25/1971", "256-555-4855"
```

If you remove the quotation marks and commas, the patron's information remains. This is the information that P-Link gleans from the file when you begin the profile with the tag **-q**.



The **-q** filters out the quotes and commas and the **t** tag filters the file down to the information you want to add to your database. From here, all you need to do is determine the position of each piece of information and insert the proper tag into the profile. Once you have created the profile, P-Link will import the patron information according to the parameters you have set.

### Importing a Quotes and Commas Profile

**Note:** Before starting the import, confirm that you are working with a **Quotes and Commas** import file.

1. On the **PLink (Patron Importer)** dialog box, enter the location of your file in the **Import File:** field, or click the **Browse** button to access the **Open** dialog box and find your import file.

2. Enter the location of your import profile in the **Profile:** field, or click the **Browse** button to access the **Open** dialog box where you can find your profile. For example, you could use the **QuotesAndCommas.pro** file delivered with your Concourse.  
**Note:** By default, the **Open** dialog box is looking in the profile samples folder delivered with your Concourse. By default, this is located in **C:\Book Systems, Inc\Concourse\Config\Profiles\Samples**. If you chose a different location for your Concourse during installation, that path is used.
3. To view how your data is separated into fields based on the current profile, click the **Test Profile** button to open the **Test PLink Profile** dialog box. Note where you need to make adjustments so that the information looks correct.
4. To edit the profile, click the **Edit Profile** button to open the **Edit File** dialog box with the text coding that constitutes a profile. Make changes to the text in order to tell P-Link how you want your information to look.
5. To adjust the order of your information, cut and paste fields in the sequence you want them. Make sure you cut and paste the entire line, not just the title of the field.
6. To adjust the field numbers for each piece of information, simply delete the current field number and enter the correct one.  
**Note:** You can determine the field number of a particular piece of information by its position in your patron file. If the patron's first name is the first piece of information given, then its entry in the profile will read as follows:  
**Patron First Name ::t:%1.**
7. As you make changes to your profile, click the **Test Profile** button periodically to make sure your edits are producing the needed results so your patron data is parsed into the correct fields.
8. Once you finish editing the profile, click **Save** to keep your changes.  
**Important!** You should save your P-Link profile often, especially while you are editing. Once you have saved a correct profile, you can reuse it for your next patron import that uses quotes and commas.
9. Configure your import options on the **PLink (Patron Importer)** dialog box; see the "Configuring PLink" section earlier in this chapter for more details.
10. Click **Import** to proceed with the patron import. If you would like to import the patron data later, click the **Save and Exit** button, or if you do not want to save your changes, click the **Cancel Changes** button.
11. If you chose to import your file, the **Importing and Updating Patrons** dialog box opens.
12. Click **Start**. The dialog box displays the current import statistics while the file loads.
13. Each time Concourse encounters a record that is associated with an unrecognized or empty patron class field, the **Select Appropriate Patron Class** dialog box opens. If you would like to see the import file, click **Show** to open the **Import Record** dialog box with the record that has the unrecognized Patron Class displayed. Click **Exit** once you are done reviewing the file.
14. Click the Patron Class that best fits the record, and then click **OK**. Concourse remembers the information chosen so that patrons with the same birth date are placed in the same **Patron Class**.

15. Once the importing process is complete, the message **Patrons Imported** displays over the progress bar and the **Stop** button toggles to **Close**.
16. Click **Close**.
17. Any patrons not imported are listed in a rejects file (**PatronRejects.001**), which is stored in the product directory. If you would like this file to contain only rejects from the current import, delete the previous version before beginning the import. Use the same application to view this file that you used for the original input file.

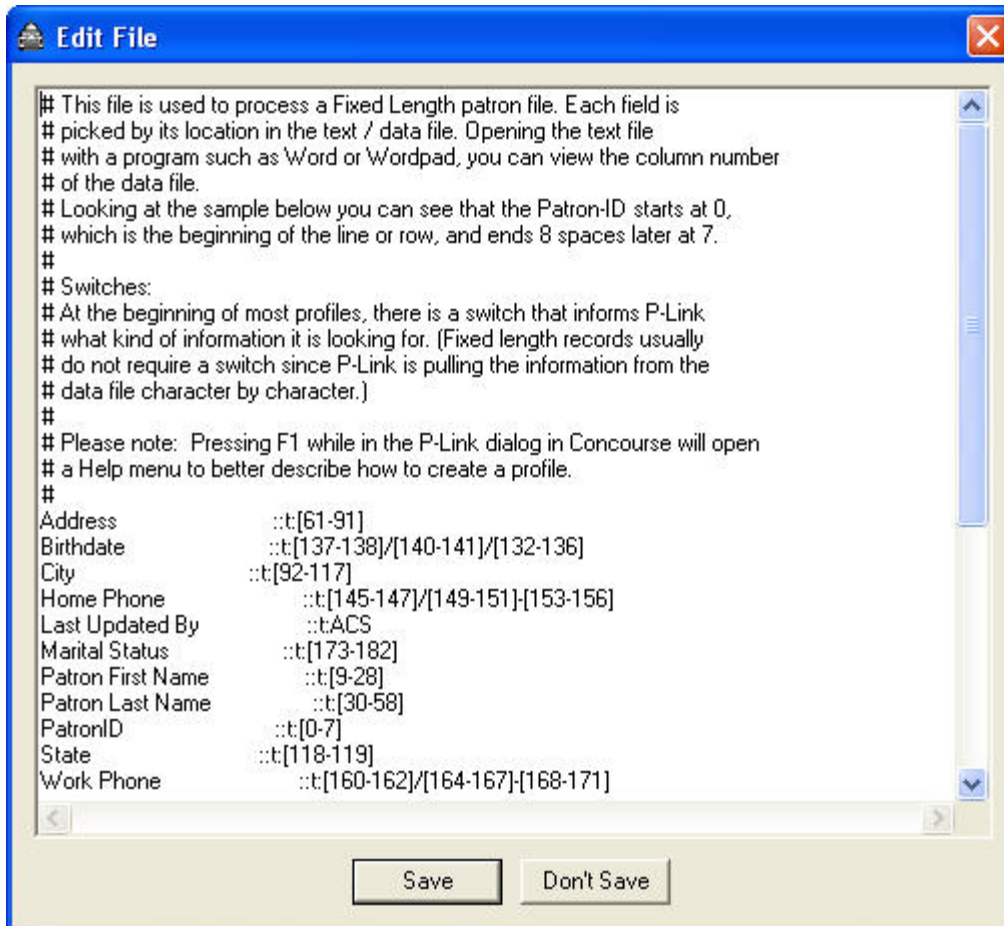
### Fixed Length Records

A fixed length record is one in which every field has a fixed length. Each field would be no longer than a certain number of characters. You can use certain software packages to help you determine the ranges of each field or you can count them manually.

4	712-384-2546	143	51018	BAKKER	JENNIFER		
	BOX 93		CUSHING	IA	51018	200405144	1
	2002082820030828						
8	372-4711	187	51016	AHRENDSEN	DEREK		
	PO BOX 393		CORRECTIONVILLE	IA	51016	200405140	2
	2003081420030828						
3	372-4502	145	51016	Briese	David		
	4325 190th Street		Correctionville	IA	51016	200405146	3
	2001081720030828						

This example file with fixed length records shows how information begins at a prescribed location and encompasses a certain number of characters. The information is counted by the number of characters or columns it covers. A patron's first name will start at a certain location and the number of columns is determined by the longest entry.

If the name 'Jennifer' is the longest name in this group of patrons, then the fixed length of the field will be eight characters. The same goes for the City entry. In the previous example, 'Correctionville' is the longest city name in this file. The number of columns for City in your profile will be the range of this city's name. To illustrate this further, look at the example on the next page of the profile for this **P-Link** session in Concourse.



As you can see, the **City** covers columns **92-117** and **Patron First Name** covers columns **9-28**. This means that P-Link will expect to find the name of the city or the patron's first name within those column ranges. If you enter the incorrect numbers, the information does not display as it should.

## Creating a Fixed Length Profile

**Note:** Before starting the import, confirm that you are working with an import file with fixed length records.

1. On the **PLink (Patron Importer)** dialog box, enter the location of your file in the **Import File:** field, or click the **Browse** button to access the **Open** dialog box and find your import file.
2. Enter the location of your import profile in the **Profile:** field, or click the **Browse** button to access the **Open** dialog box where you can find your profile. For example, you could use the **FixedLengthRecords.pro** file delivered with your Concourse.

**Note:** By default, the **Open** dialog box is looking in the profile samples folder delivered with your Concourse. By default, this is located in **C:\Book Systems, Inc\Concourse\Config\Profiles\Samples**. If you chose a different location for your Concourse during installation, that path is used.

3. To view how your data is separated into fields based on the current profile, click the **Test Profile** button to open the **Test PLink Profile** dialog box. Note where you need to make adjustments so that the information looks correct.
4. To edit the profile, click the **Edit Profile** button to open the **Edit File** dialog box with the text coding that constitutes a profile. Make changes to the text in order to tell P-Link how you want your information to look.
5. To adjust the order of your information, cut and paste fields in the sequence you want them. Make sure you cut and paste the entire line, not just the title of the field.
6. To adjust the field numbers for each piece of information, simply delete the current column ranges and insert the correct ones. Remember to test the profile periodically to check if your ranges are correct.

**Important!** To determine the column ranges for the information in your fixed length import file, you will need to use software that will allow you to see what position you are in, such as Microsoft Word. Across the bottom of the program, you can see what line and column your cursor is in at any one time. Use that resource or a similar one to facilitate determining your column widths. Below is an example of Word's column position counter. In this example the cursor is positioned at 1.5", line 4, column 5. You can use this capability to determine the column range of a particular field of information.

At 1.5"    Ln 4    Col 5

7. Once you finish editing the profile, click **Save** to keep your changes.
 

**Important!** You should save your **P-Link** profile often, especially while you are editing. Once the profile is correct and you have saved it, you can reuse the profile for your next patron import that uses fixed length records.
8. Configure your import options on the **PLink (Patron Importer)** dialog box; see the "Configuring P-Link" section earlier in this chapter for more details.
9. Click **Import** to proceed with the patron importing. If you would like to import the patron data later, click the **Save and Exit** button, or if you do not want to save your changes, click the **Cancel Changes** button.
10. If you chose to import your file, the **Importing and Updating Patrons** dialog box opens.
11. Click **Start**. The dialog box displays the current import statistics while the file loads.
12. Each time Concourse encounters a record that is associated with an unrecognized or empty patron class field, the **Select Appropriate Patron Class** dialog box opens. If you would like to see the import file, click **Show** to open the **Import Record** dialog box with the record that has the unrecognized Patron Class displayed. Click **Exit** once you are done reviewing the file.
13. Click the Patron Class that best fits the record, and then click **OK**. Concourse remembers the information chosen so that patrons with the same birth date are placed in the same **Patron Class**.
14. Once the importing process is complete, the message **Patrons Imported** displays over the progress bar and the **Stop** button toggles to **Close**.

15. Click **Close**.
16. Any patrons not imported are listed in a rejects file (**PatronRejects.001**), which is stored in the product directory. If you would like this file to contain only rejects from the current import, delete the previous version before beginning the import. Use the same application to view this file that you used for the original input file.

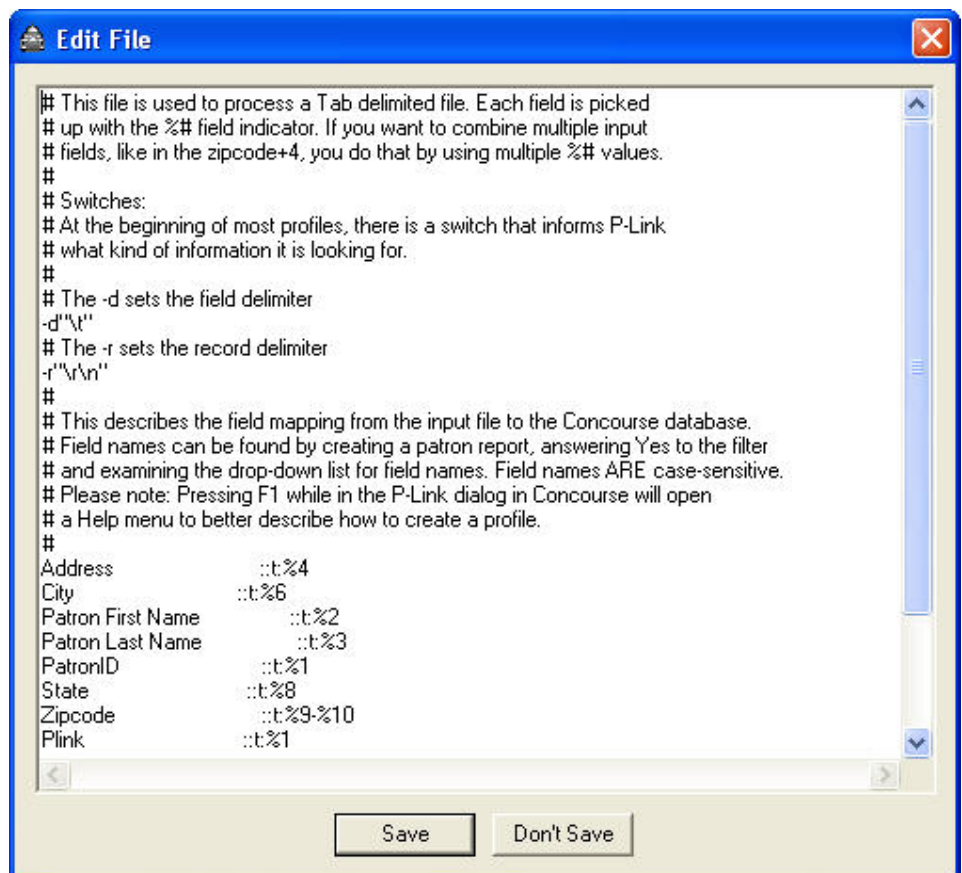
### Variable Length Records

A variable length record has fields of multiple lengths and typically uses field separators, like tabs or spaces. P-Link will parse out the tabs or spaces and extract the patron data, filling in the profile you select.

Alexander, Gary	00000018		1756 Mountainwoods Cir.
Birmingham	AL	35222	03/08/1989
Banks, Pamela	00000019		2512 Greenwood Cir.
Birmingham	AL	35222	06/22/1988
Brooks, Sidney	00000038		5221 Highway 78
Birmingham	AL	35222	08/01/1984
Cherry, Robin	00000020		181 Mission Drive
Birmingham	AL	35224	10/10/1987
Cocke, Wallace	00000013		807 Jeffery Lane
Birmingham	AL	35223	12/22/1950

Each piece of information in this file (name, barcode, address, and birth date) is separated by a tab. Files such as this can also use spaces and other keystrokes to separate the information. When you create a variable length profile, P-Link will filter out the extra keystrokes to glean the needed information and insert that into your database.

A sample P-Link profile displays to the right:



In this profile, the **t** tells P-Link to filter out the white space created by the tabs. The number refers to the position of that particular piece in the tab-delimited file. In position one, you will find the patron name, which matches the import file example on the previous page. The second position is the patron's barcode, which this librarian decided to make their P-Link value as well. If you enter the incorrect position for a particular piece of information, the patron's information will not display correctly, but you can easily correct this before beginning your import.

## Creating a Variable Length Profile

**Note:** Before starting the import, confirm that you are working with an import file with variable length records.

1. On the **PLink (Patron Importer)** dialog box, enter the location of your file in the **Import File:** field, or click the **Browse** button to access the **Open** dialog box and find your import file.
2. Enter the location of your import profile in the **Profile:** field, or click the **Browse** button to access the **Open** dialog box where you can find your profile. For example, you could use the **TabDelimited.pro** file delivered with your Concourse.

**Note:** By default, the **Open** dialog box is looking in the profile samples folder delivered with your Concourse. By default, this is located in **C:\Book Systems, Inc\Concourse\Config\Profiles\Samples**. If you chose a different location for your Concourse during installation, that path is used.

3. To view how your data is separated into fields based on the current profile, click the **Test Profile** button to open the **Test PLink Profile** dialog box. Note where you need to make adjustments so that the information looks correct.
4. To edit the profile, click the **Edit Profile** button to open the **Edit File** dialog box with the text coding that constitutes a profile. Make changes to the text in order to tell P-Link how you want your information to look.
5. To adjust the order of your information, cut and paste fields in the sequence you want them. Make sure you cut and paste the entire line, not just the title of the field.
6. To adjust the field numbers for each piece of information, simply delete the current field number and enter the correct one.
7. As you make changes to your profile, click the **Test Profile** button periodically to make sure your edits are producing the needed results so your patron data is parsed into the correct fields.
8. Once you finish editing the profile, click **Save** to keep your changes.  
**Important!** You should save your P-Link profile often, especially while you are editing. Once you have saved a correct profile, you can reuse it for your next patron import that uses variable length records.
9. Configure your import options on the **PLink (Patron Importer)** dialog box; see the "Configuring PLink" section earlier in this chapter for more details.
10. Click **Import** to proceed with the patron importing. If you would like to import the patron data later, click the **Save and Exit** button, or if you do not want to save your changes, click the **Cancel Changes** button.

11. If you chose to import your file, the **Importing and Updating Patrons** dialog box opens.
12. Click **Start**. The dialog box displays the current import statistics while the file loads.
13. Each time Concourse encounters a record that is associated with an unrecognized or empty patron class field, the **Select Appropriate Patron Class** dialog box opens. If you would like to see the import file, click **Show** to open the **Import Record** dialog box with the record that has the unrecognized Patron Class displayed. Click **Exit** once you are done reviewing the file.
14. Click the Patron Class that best fits the record, and then click **OK**. Concourse remembers the information chosen so that patrons with the same birth date are placed in the same **Patron Class**.
15. Once the importing process is complete, the message **Patrons Imported** displays over the progress bar and the **Stop** button toggles to **Close**.
16. Click **Close**.
17. Any patrons not imported are listed in a rejects file (**PatronRejects.001**), which is stored in the product directory. If you would like this file to contain only rejects from the current import, delete the previous version before beginning the import. Use the same application to view this file that you used for the original input file.

---

## After Importing

If all of your patrons were successfully imported, you can open a **Patron List** report to view your new patron information or you can continue your library's activities.

If any patron records were not imported, you can return to your system's Concourse directory and view the **PatronRejects.001** file; this can help you determine why records were not added to Concourse. You can then make the necessary changes to those patrons' information and perform the import process again.

## Chapter 15: Authority

When cataloging items, format consistency is imperative. The **Authority** module in Concourse allows you to adhere to the Library of Congress MARC Authority Standard or to implement and follow your own local authority standards. You can purchase authority records from vendors or the Library of Congress. You can also create your own local authority records.

**Note:** Authority is not supported in Concourse Pro.

The **Authority** module includes the following features:

- Supports subject heading validation against the appropriate authority file
- Permits you to create a file of records with a specific subject heading or subject subdivision
- Allows you to record the source of each authorized heading or entry
- Lets you choose the selection of bibliographic entries under authority control
- Allows you to quickly and easily create **See** references and **See Also** references for bibliographic records based on new authority records
- Ensures that new entries are not automatically changed if they match **See** references
- Promotes genuinely useful cross-references by preventing records from using circular **See** and **See Also** references
- Streamlines authority records by making sure there are no duplicates
- Offers maximum authority record length, field length, and subfield length other than those consistent with MARC 21
- Supports real-time authority verification when creating or editing bibliographic records
- Accommodates a single authority index or the addition of multiple indexes
- Displays a list of valid headings from the authority file on demand when the heading entered in the item record does not match a heading in the authority file
- Permits full screen editing for modifying authority records
- Displays the total number of bibliographic records linked to a specified authority heading or individual bibliographic records linked to a specified authority heading
- Pulls an authorized heading from the authority file instead of an existing bibliographic record when a heading is being corrected in a bibliographic record, if needed

---

### What are Authority Records?

Authority records use controlled vocabulary to standardize information in a consistent format. A single, authorized term is used for each concept in a bibliographic record, such as authors' names and subject headings. Using controlled vocabulary to maintain consistency in a library catalog is known as authority control.

An authority record consists of an authorized heading, as well as unauthorized and related headings. The record may also contain a list of sources, used to decide which heading became the authorized one.

Data verification is the process by which authority records provide uniformity for names, uniform and series titles, and subject headings.

### **Cross-reference generation**

Cross-reference generation is another function of authority records. One type of cross-reference leads a searcher from an invalid or unauthorized heading to an authorized one that is valid. This type of cross-reference is known as a **See** reference.

Another type of cross-reference involves two or more valid terms, which are related to each other. One heading directs the searcher's attention to a similar heading. For example, someone interested in forestry might also be interested in trees. This type of cross-reference is called a **See Also** reference.

---

## **Authority Reports**

You can create authority reports to determine which name/subject terms have been entered into authority and which have not. To build an authority report, click the **REPORTS** button on the **Navigator Toolbar**, click **Reports** on the flow chart, and then click one of the following authority reports:

- **Name Authority**
- **Subject Authority**

Concourse allows you to find authority records by letter whenever you generate a report. For example, when you compile a **Name Authority** report, Concourse asks you if you want to limit the results to a letter. Enter that letter and then click **Start**. The compiled report features only information that starts with the letter you specified. If you need to see all name authority records, simply click **Start** without entering a letter.

The **Name Authority** report is organized alphabetically by author last names, which display in the **Authors** column. The number of items in your library written by each author is listed in the **Items** column. Items in **blue** conform to authority. Items in **black** do not.

The **Subject Authority** report is similar to the **Name Authority** report. You can specify a letter to find subject headings by the beginning letter; all subject headings are listed in alphabetical order along with the number of item records that contain each heading and color-coding to let you know which items conform to authority.

---

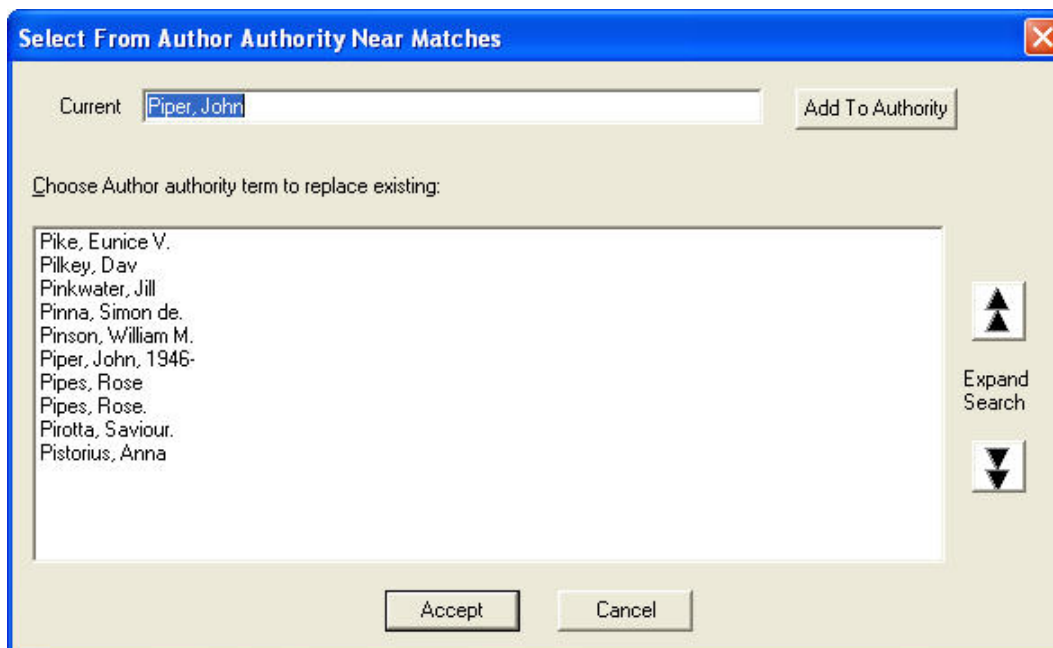
## **Adding to Authority**

Concourse makes adding to and updating your authority files simple and efficient. You can add to and edit your name authority and subject authority data.

## Name Authority

Use the steps below to add new name authority records to your database.

1. Click the **CATALOG** button on the **Navigator Toolbar**.
2. Click the **Authority** button on the flow chart to open a shortcut menu.
3. Click **Add/Edit Authority | Name Authority...** to open the **Author Authority Data Entry** dialog box.
4. Click the **Type** drop-down button, and click again to select one of the following:
  - Personal Name
  - Corporate Name
  - Meeting Name
  - Uniform Title
  - Topical Term
  - Geographic Name
5. In the **Value** field, enter the author name (last name first) and click **Lookup**. The **Select From Author Authority Near Matches** dialog box opens with the author name in the **Current** field.



6. If needed, you can click **Add To Authority** to add the author name to your authority database as it displays in the **Current** field. The **Author Authority Data Entry** dialog box reopens, displaying the author name in the **Value** field as originally entered. Skip steps 7-8 and proceed to step 9.
7. If you prefer, click a name in the **Choose Author authority term to replace existing:** list to replace the name in the **Current** field.

**Note:** If needed, click the **Expand Search** arrows to the right to see more options. The list expands alphabetically in ascending or descending order as applicable.

8. Click **Accept** to continue; otherwise, click **Cancel**. The **Author Authority Data Entry** dialog box reopens, displaying the author name in the **Value** field.
9. If applicable, enter other, *unauthorized* names by which the author is known in the **See References** field.
10. If applicable, enter other, authorized names by which the author is known in the **See Also References** field.
11. In the **Source** field, enter the location from which the authority record originated; this can be another library or your own.  
**Example:** United States, Library of Congress (Washington, DC)
12. By default, today's date displays in the **Entry Date** field. If needed, use the drop-down arrows to select a different date. See the "Entering Dates" section in **Chapter 2** for more information.
13. Click **Add/Modify** to save your changes; otherwise, click **Delete**.
14. Click **Close** to exit the **Author Authority Data Entry** dialog box.

## Subject Authority

Use the steps below to add new subject authority records to your database.

1. Click the **CATALOG** button on the **Navigator Toolbar**.
2. Click the **Authority** button on the flow chart to open a shortcut menu.
3. Click **Add/Edit Authority | Subject Authority...** to open the **Subject Authority Data Entry** dialog box.
4. Click the **Type** drop-down button, and click again to select one of the following:
  - Personal Name
  - Corporate Name
  - Meeting Name
  - Uniform Title
  - Topical Term
  - Geographic Name

5. In the **Value** field, enter the subject and click **Lookup**. The **Select From Subject Authority Near Matches** dialog box opens with the subject name in the **Current** field.

**Select From Subject Authority Near Matches**

Current:

Choose Subject authority term to replace existing:

- Hispanic Americans--Social life and customs.
- Hispanic studies--Periodicals.
- Historic sites--California--Juvenile literature.
- Historic sites--California.
- Historical fiction.
- History (Theology)
- History (Theology).
- History of Medicine, 19th Cent.
- History of Medicine, 20th Cent.
- History, Ancient.

Expand Search

6. If needed, you can click **Add To Authority** to add the subject name to your authority database as it displays in the **Current** field. The **Subject Authority Data Entry** dialog box reopens, displaying the subject in the **Value** field as originally entered. Skip steps 7-8 and proceed to step 9.
7. If you prefer, click a term in the **Choose Subject authority term to replace existing:** list to replace the subject in the **Current** field.  
**Note:** If needed, click the **Expand Search** arrows to the right to see more options. The list expands alphabetically in ascending or descending order as applicable.
8. Click **Accept** to continue; otherwise, click **Cancel**. The **Subject Authority Data Entry** dialog box reopens, displaying the subject in the **Value** field as selected from the **Choose Subject authority term to replace existing:** list.
9. If needed, enter other, *unauthorized* terms that have the same meaning in the **See References** field.
10. If needed, enter other, *authorized* terms that have the same meaning in the **See Also References** field.
11. In the **Source** field, enter the location from which the authority record originated; this could be another library or your own.  
**Example:** United States, Library of Congress (Washington, DC)
12. By default, today's date displays in the **Entry Date** field. If needed, use the drop-down arrows to select a different date. See the "Entering Dates" section in **Chapter 2** for more information.
13. Click **Add/Modify** to save your changes; otherwise, click **Delete**.
14. Click **Close** to exit the **Subject Authority Data Entry** dialog box.

## Import MARC Authority Records

Concourse allows you to import MARC authority records from other locations.

1. Click the **CATALOG** button on the **Navigator Toolbar**.
2. Click the **Authority** button on the flow chart to open a shortcut menu.
3. Click **Import MARC Authority...** to open the **Import MARC 21 Authority Records** dialog box.
4. To overwrite existing authority records that match the item IDs of imported records, click the **Replace Existing Records** check box. Otherwise, authority records with duplicate item IDs are rejected.
5. To include the current date in the record, click the **Put today's date in 'Entry Date' field** check box.

6. To skip MARC authority records, enter the number of records to be skipped in the **Skip First {number} Records** field.
7. Enter the location source in the **Import** field, or click the corresponding **Browse...** button to access the **Open** dialog box and find the correct file.
8. To start importing authority records, click **Begin Import**; otherwise, click **Cancel** to erase your input and dismiss the dialog box.
9. After starting the import, the **Cancel** button toggles to **Stop** in case you need to end the import, and the **Import Status** section of the dialog box and the progress bar reflect the status of records being imported.
10. When the process is complete, the progress bar is full and the **Stop** button toggles to **Close**. Click **Close** to dismiss the dialog box.

## Export MARC Authority Records

Concourse also allows you to export MARC authority records so they can be uploaded to other locations.

1. Click the **CATALOG** button on the **Navigator Toolbar**.
2. Click the **Authority** button on the flow chart to open a shortcut menu.
3. Click **Export MARC Authority...** to open the **Export MARC 21 Authority Records** dialog box.

4. Click the **Export Name Authority** or **Export Subject Authority** radio button to specify which type of authority records you need to export.
5. Enter the file name in the **Export To File:** field, or click the corresponding **Browse...** button to access the **Open** dialog box and find the correct file.
6. If needed, click the **Clean on Export:** option, and click the **Cleaning Prefs** button to open the **Cleaning Preferences** dialog box.
7. If you want to clean any MARC tags before exporting, you can add tags for cleaning and for preserving:
  - To add a tag to the **Clean** list, enter the tag name in the field in the middle of the dialog box, and click **<-Add**.
  - To add a tag to the **Preserve** list, enter the tag name in the field in the middle of the dialog box, and click **Add->**

- To remove a listed MARC record tag, click the appropriate tag in the **Clean** or **Preserve** list, and click **Remove**.
8. When you are satisfied with your lists, click **OK**; otherwise, click **Cancel** to discard your changes and dismiss the dialog box. You are returned to the **Export MARC 21 Authority Records** dialog box.
  9. Enter a brief description of the authority records you are exporting in the **Description:** field. By default, this reads **Export of authority records from today's date and time**.
  10. Enter your location in the **Location:** field.
  11. To add any comments or remarks about the export, enter text in the **Note:** field.
  12. Click **OK** to begin the export; otherwise, click **Exit** to discard your changes and dismiss the dialog box.
  13. A dialog box displays, indicating the number of items exported and the number of items skipped. Click **OK** to dismiss the dialog box.
  14. The **Export MARC 21 Authority Records** dialog box still displays, and the **Exit** button toggles to **Close ESC**. You can perform another export, e.g., if you exported name authority and need to export subject authority as well. Otherwise, click **Close ESC** to dismiss the dialog box.

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## **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](mailto:support@booksys.com). Business hours are Monday through Friday, 7 a.m. – 7 p.m. Central Standard Time.

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