SOUL 2.0 User Manual



Information and Library Network Centre (An Autonomous Inter-University Centre of U G C)





User Manual



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(An Autonomous Inter-University Centre of UGC)

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Important Details

SOUL CD Key

Activation Key

Month/Year of Purchase

Name of Institute



About SOUL 2.0

Software for University Libraries (SOUL) is a state-of-the-art integrated library management software designed and developed by the INFLIBNET Centre based on requirements of college and university libraries. It is a user-friendly software developed to work under client-server environment. The software is compliant to international standards for bibliographic formats, networking and circulation protocols. After a comprehensive study, discussions and deliberations with the senior library professionals of the country, the software was designed to automate all housekeeping operations in a library. The software is suitable not only for the academic libraries, but also for all types and sizes of libraries, even school libraries. The first version of software i.e. SOUL 1.0 was released during CALIBER 2000. The database of the SOUL 1.0 was designed on MS-SQL and was compatible with MS SQL Server 7.0 or higher. The latest version of the software i.e. SOUL 2.0 has been designed for latest versions of MS-SQL and MySQL (or any other popular RDBMS). SOUL 2.0 is compliant to international standards such as MARC 21 bibliographic format, Unicode-based Universal Character Sets for multilingual bibliographic records and NCIP 2.0/ SIP2 based protocols for electronic surveillance and control.

Major Features and Functions

Major features and functionalities of SOUL 2.0 are as follows:

- UNICODE-based multilingual support for Indian and foreign languages;
- Compliant to International Standards such as MARC21, AACR-2, MARCXML;
- Compliant to NCIP 2.0 and SIP2 protocol for RFID and other related applications especially for electronic surveillance and self check-out & check-in;



- Client-server based architecture, user-friendly interface that does not require extensive training;
- Supports multi-platform for bibliographic database such as My SQL, MS-SQL or any other RDBMS;
- Supports cataloguing of electronic resources such as e-journals, ebooks, virtually any type of material;
- Supports requirements of digital library and facilitate link to full-text articles and other digital objects;
- Supports online copy cataloguing from MARC21 bibliographic database;
- Provides default templates for data entry of different type of documents. User can also customize their own data entry templates for different type of documents;
- Provides freedom to users for generating reports of their choice and format along with template and query parameters;
- Supports ground-level practical requirements of the libraries such as stock verification, book bank, vigorous maintenance functions, transaction level enhanced security, etc.;
- Provides facility to send reports through e-mail, allows users to save the reports in various formats such as PDF, Excel, MARCXML, etc.;
- Highly versatile and user-friendly OPAC with simple and advanced search. OPAC users can export their search results into PDF, MS Excel, and MARCXML format;
- Supports authority files of personal name and corporate body ;
- Supports data exchange through ISO-2709 standard;
- Update form Software as well as offline update;
- Global Search and replace
- Provides simple budgeting system and single window operation for all major circulation functions;
- Strong region-wise support for maintenance through regional coordinators. Strong online and offline support by e-mail, chat and through dedicated telephone line during office hours; and
- Available at an affordable cost with strong institutional support.



Modules

The SOUL 2.0 consists of the following modules. Each module has further been divided into sub-modules to cater to its functional requirements:

- Acquisition
- ♦ Catalogue
- Circulation
- OPAC
- Serial Control
- Administration

The in-built network feature of the software will allow multiple libraries of the same university to function together as well as access to the distributed databases installed at university libraries and union catalogue mounted at INFLIBNET using VSAT network.

Acquisition

The module enables library staff to handle all the major functions, such as

- Suggestions Management;
- Order Processing, Cancellation and Reminders;
- Receipt, Payment and Budgetary control;
- Master files such as Currency, Vendors, Publishers etc.; and
- Reports.

Catalogue

Catalogue module is used for retrospective conversion of library resources. It also facilitates library staff to process of the newly acquired library resources. The strong features of catalogue module are:



- Allows cataloguer to create their own templates for data entry of different library resources;
- Different templates for leaders and fixed fields of MARC21;
- Allows user-generated customized reports;
- Facilitates authority database of person name, corporate body, subject headings and series name;
- Supports copy cataloguing in MARC21 format by using ISO-2709 standard;
- Master database of publishers;

Circulation

This module takes care of all possible functions of circulation. Sufficient care has been taken in designing this module starting from membership management, maintenance and status of library items, transaction, ILL, overdue charges, renewals & reminders, search status and report generation according to the status of the items. The circulation module is fully compliant with the NISO Circulation and Interchange Protocol (NCIP) version 2.0 as well as SIP2 for electronic surveillance and RFID based transaction of the items. Major functions of the circulation modules are:

- Membership;
- Transaction;
- Inter-library loan;
- Overdue charges;
- Reminder;
- Search status;
- Maintenance of the items such as binding, lost, replace, missing, withdrawl, etc.; and
- Report generation based on the various requirements.



On-line Public Access Catalogue (OPAC)

One of the major attractions of SOUL is its robust On-line Public Access Catalogue (OPAC). The OPAC has simple and advanced search facility with the minimum information for each item including author, title, corporate body, conference name, subject headings, keywords, class number, series name, accession number or combination of any of two or more information regarding the item. Major functions provided in the OPAC module are:

- Simple Search;
- Boolean Search;
- Advanced Boolean Search;
- Displaying and downloading of records in MS Excel, PDF or MARCXML; and
- Search support for the items that are in the acquition process in the library.

Serial Control

Managing serials is the most complicated job for a library. The module keeps track of serials in the library effectively and efficiently. The searial control module is developed based on the KARDEX system and the following functions built into it:

- Suggestions;
- Master databases;
- Subscriptions;
- Check-in of individual issues of journals;
- Payment, reminder, binding, and title history;
- Export / import by using ISO 2709 bibliographic exchange format;
- Article indexing of journal/book articles;
- Cataloguing of electronic journals; and
- eeps track of the history changes of the journals.



Administration

In addition to the features available in the Administration Module of the SOUL 1.0, some more features have been added to the administration module of the SOUL 2.0 as per inputs from the various SOUL users and requirements of the library staff. The module has been divided into three major sub modules for accommodating the new features. These three sub-modules are User Management, System Parameters and Masters. The Administration Module provides the following:

- Grouping of users based on the policy;
- Transactional rights over the systems;
- Transaction level security to users;
- Various configuration settings such as labels, e-mail and other parameters related to the software use; and
- Common master databases being used in modules.





Installation Procedure

Pre-Requisites Minimum Hardware Requirements

- Processor Type : PIV or Higher
- Processor Speed : 1 GHz or Higher
- RAM : Minimum 512 MB (1 GB Recommended)
- Free Hard Disk Space : 400 MB (Minimum)

Supported Operating System Platforms

Windows XP SP3, Windows Vista, Windows 2003 Server, Windows 2008 Server (Latest Service Packs are always recommended)

Other Pre Requisites

- Windows Installer Version 3.1
- Dot Net framework Version 2.0
- Microsoft Data Access Components Version 2.8 (SP1)
- Microsoft Report Viewer 2005

To install all pre-requisites together please execute setup.exe from "PreReq" folder in your CD

Installation

Installation of SOUL 2.0 has been divided into following three parts:

- 1. Database Installation
- 2. Application Installation
- 3. Utility Installation

1. Database Installation

SOUL 2.0 can be installed on multiple RDBMS platforms. Present version of software has been tested on Microsoft SQL Server 200x and MySQL 5.x.



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Installation of database server is must before installing SOUL 2.0 application. The system on which you install RDBMS will become server for you that, installation can be done based on back-end database that you wish to use. Choose one of the following three options:

Option I: User does not have any RDBMS Installed

SOUL 2.0 is bundled with database engine which is based on Microsoft SQL Server 2005 Express. This database engine will be enough for libraries with smaller collection. This database engine can be installed by running setup.exe from "S20DBEN" folder of your CD. After setting it up, please follow the steps mentioned in option II.

Note : Set your server to listen TCP/IP by going in to Programs > Microsoft SQL Server > Configuration manger > Network Configuration > Protocols for MS SQL Server > TCP/IP Set to Enable.

Option II: User is having SQL Server 200x installed on server

As you have already installed database engine, now you need to create a new database and install default values, to do this, please run setup.exe from "S20DBCR" folder of your CD.

In this screen you will be prompted to enter Server Name, Database Name, Username, Password.

Server Name	<name database="" engine="" has<br="" of="" system="" where="" your="">been installed></name>
Database Name	< Name of the database where you want to store SOUL data>
User Name	< Enter 'sa' if you have not created any user>
Password	< Keep 'soul20' in case of default installation or replace with your password>

Enter following values:



Proceed further by pressing next button. Your database will be created which you can use to refer in your ODBC Settings.

Now you will be required to create an ODBC entry pointing to your database. Please refer section "Creating ODBC entry" for more help.

Option III: User is having MySQL [or any other RDBMS]

If you wish to use any other RDBMS for database, create a new Database by any name, and execute the script provided in "Scripts" folder from CD.

Create an ODBC entry pointing to your database. Please refere section "Creating ODBC entry" for more help.

2. Application Installation

A. SOUL 2.0 Server Installation

SOUL server utility is required for authentication of your package; SOUL Software Application will not run without installing this package. To install this utility, please run setup.exe from S20SERV" folder from your CD.

Here you will be prompted to enter your ID Key given by INFLIBNET Centre, then click on "next" button to complete installation. Once Installation is complete Soul Server application will start automatically. To activate product click on "Generate Handshake Key" button, Which will give you a unique handshake key. By supplying this key to INFLIBNET Centre you will get an activation key in return. Enter that key into your Soul Server Application & click on "Activate Product" to activate your Soul application. After entering activation key, one can start using product.

Note: You will be allowed to work for 7 days without activation.

B. SOUL 2.0 Application Installation



SOUL 2.0 application can be installed by clicking setup.exe from "S20APP" folder.

After installation, while executing you will be asked to choose database through ODBC.

3. Creating ODBC Entry

- Go to control panel
- Open "Administrative Tools"
- Open "Data Sources (ODBC)"
- Select "User DSN" Tab, click on add button
- You will be asked to choose your database driver, here make a selection as per your database server type as explained in above cases (In case of default install choose "SQL server")
- Enter your ODBC name, and name of your server and click "next"
- Choose authentication type (For option I it will be SQL Server authentication)
- Enter Login Name and Password (For option I it will 'sa' and 'soul20')
- You will be prompted to choose name of your database, please enter the name of database that have created.

4. Running the Application First Time

When you will run the SOUL 2.0 application for the first time, you will be prompted to enter DSN (Data Source Name), Here you have to choose the ODBC entry which you have created in earlier step. This will enable your application to connect to the database. You will also be prompted to enter IP address of the machine where 'SOUL Server' application has been installed, please enter IP Address in proper format.

5. Installing Data Transfer Utility

This utility has been exclusively made for users who are changing from their earlier edition of SOUL to SOUL 2.0, To get this utility installed please execute setup.exe from "S20DBTR" folder. One can execute



this utility by going into programs > INFLIBNET Center > SOUL Data Transfer

6. Installing Web OPAC

Note: Before installing WebOPAC please check that IIS 6 or higher has been enabled in your system, for enabling IIS, please refer to your Operating System documentation.

To have WebOPAC installed in your server please execute setup.exe from "S20WEB" folder. There are instances that some of IIS configuration may not allow direct installation of WebOPAC due to authentication issues. In such cases, please copy entire 'WebOPAC' folder to your IIS's web root, create an application using IIS Administration.

The next step is to edit 'web.config' file which is available in 'WebOPAC' folder, please look for the following lines and feed-in the values which are marked as bold:

<addkey="ConnectionString"value="DSN=<YOURDSN>;UID=< YOURSQLUSERID>;PWD=<YOURSQLPASSWORD>;DATABA SE=<YOUR SOUL DATABASE>;"/>

Please note that for security reasons it is recommended to create a separate 'System DSN' as explained in "Creating ODBC" section and assign different user name and password to your SOUL database.

7. Installing NCIP 2.0 Server

To Install NCIP 2.0 Server please execute setup.exe from "S20NCIP" folder

8. Installing SIP 2 Server

To install SIP 2.0 Server please execute setup.exe from "S20SIP" folder



Configuring your operating system for Unicode-based Indic Script Support

SOUL 2.0 supports entry in almost all Unicode-based languages. However, to work with Indian languages Indic support must be enabled in your operating system. Following are the steps given below for enabling Indic support for your operating systems;

Windows XP and Server 2003

Configuring Indic text

- Install at least one Unicode font in your system, associated with the language that you want to view correctly, or install a Unicode font which contains large character set for many different languages.
- b. Go to Start > Control Panel.
- c. If you are in "Category View", select the icon that says "Date, Time, Language and Regional Options" and then select "Regional and Language Options".
- d. If you are in "Classic View", select the icon that says "Regional and Language Options".
- e. Select the "Languages" tab and make sure you select the option saying "Install files for complex script and right-to-left languages (including Thai)". A confirmation message should now appear press "OK" on this confirmation message.
- f. Allow the OS to install necessary files from the Windows XP CD and then reboot, if prompted.

Inputting Indic text

Windows XP has inbuilt InScript Keyboards for nearly all Indian languages. You can add them via Control Panel. You must follow the steps above before you perform the remaining steps.



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- a. In the "Regional and Language Options", click the "Languages" tab.
- b. Click on the "Details" tab.
- c. Click the "Add" button to add a keyboard for your particular language.
- d. In the drop-down box, select your required Indian language.
- e. Make sure the check box labelled "Keyboard layout/IME" is selected and ensure you select an appropriate keyboard.
- f. Now select "OK" to save changes.

You can use the combination ALT + SHIFT to switch between different keyboard layouts (e.g. from a UK Keyboard to Gujarati and vice-versa). If you want a language bar, you can select it by pressing the "Language Bar..." button on the "Text Services and Input Languages" dialog and then selecting "Show the language bar on my desktop". The language bar enables you to visually select the keyboard layout you are using.

For the people who are not able to use the above InScript Keyboard, there are some other Keyboard Drivers available. For Phonetic typing BarahaIME (http://www.baraha.com) is suggested and for Remington typing IndicIME (http://www.bhashaindia.com) is suggested.

Indic IME 1 (v5.x) is available from Microsoft Bhasha India portal. This supports Hindi Scripts, Gujarati, Kannada and Tamil. Indic IME 1 gives the user a choice between a number of keyboards including Phonetic, InScript and Remington.

Windows Vista

Viewing Indic text

You do not need to do anything to enable viewing of Indic text.

Inputting Indic text

Windows Vista, like Windows XP, has inbuilt InScript keyboards for nearly all Indian languages. You can add them via the Control Panel.



- a. Go to Start > Control Panel
- **b.** If you are in normal view, select Change keyboards or other input methods from under Clock, Language and Region.
- **c.** If you are in Classic view, select Regional and Language Options.
- **d.** Select the Keyboards and Languages tab if it is not already selected.
- e. Select the Change keyboards... button.
- f. Choose you desired language(s) from the list and expand them using the '+' sign. Then, expand the item which says Keyboard and tick your preferred keyboard layout(s).
- g. Select OK, and OK again to save the changes.

The hot key combination for switching between languages is Left Alt+Shift.

For Phonetic typing, BarahalME and for Remington typing, IndicIME is suggested.

Database Backup / Restore Utility

This utility is available in 'DBBack' folder of CD supplied to you. It has been exclusively made for those users who are using Database Engine supplied along with SOUL 2.0 software.

This utility can be used for taking backup from SQL Server and to restore it in the same or another SQL server. It must be installed in the system where SQL Server is installed.

This utility facilitate user to perform backup/restore operation in the following two ways:

A. Create backup file (.BAK) and restore

This option can be used for regular backup operations, You are requested to take backup more frequently if number of transactions are more.



B. Detach .MDF/ .LDF file and attach it to restore

This option needs to be exercised with utmost care, as it completely detaches database file from SQL server. This option is useful in following cases:

- If you are changing your server from one machine to another machine
- If you are upgrading from SOUL 1.x to SOUL 2.0 on same machine or another machine
- If you are re-installing the software.

	Conr	ection Properties		
	\$	erver Name : S	wapnil-pc	
		User Name 1 s	1	
		Password :	-	
		Co	mect	
		-		
Detach MDF File / B	ackup		Attach MDF File / Restore	
Database Name :	soul7		Import Path :	Browse
Export Path :	D:\DBBackup for test	Browse	Database Name :	
		AK)	Import & Attach (.MDF)	Restore (.BAK)

To take backup/detach database file perform following steps:

- Give Server Name, Username and Password for SQL and press "Connect".
- After getting 'connection successful' message select the database name from the dropdown menu of which you want to take backup
- Select export path using "Browse" button. (It is advisable to give SQL Server data path in case of Detach MDF file)
- Press "Detach & Export (MDF)" or "Backup" (In case of Backup, it will ask for the new backup file name)

To restore/attach the database performs following steps:

Select the .MDF file path or .BAK file path from the "Browse" button



♦ Give the new database you want to restore as.

Press "Import & Attach (.MDF)" or "Restore"

Note: In case of detach file backup it will detach the old database from the server, while in backup operation the old database will remain as it is.



Upgrade Procedure for Existing Users

Follow these procedures if you are having Network Version of SOUL 1.x It is also recommended to take backup of existing system, before attempting installation of new version.

It is recommended to install SOUL 2.0 in new system (so for time being you can have both the system working in parallel).

After you have installed SOUL 2.0 in newer system, please take backup of your old database (which is available in MS SQL 200x) using backup/restore utility supplied, and restore the database on new system. Now your new system will be having two simultaneous database running over the system one will be of your old SOUL which will be having all the data and another will be of new SOUL 2.0 which is blank, execute data transfer utility for conversion from old database to newly created database.

In case if you want to install SOUL 2.0 in same system where you have installed SOUL 1.x, do not attempt to install database engine as you are already having SOUL database engine.

It is assumed that you have MS SQL Server 200x, therefore, you only need to create a new database(as explained in installation section) in your existing database engine and execute data transfer utility.

However continuing using SOUL 2.0 on MSDE 2000 platform is not being recommended, it is advisable to migrate to SQL Express 2005 or higher as soon as possible.



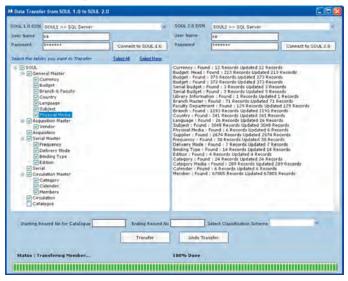
Data Transfer Utility

Data Transfer Utility is only required for those users who are using SOUL 1.0 and want to transfer their data to SOUL 2.0

SOUL 1.0 user can transfer whole database or part of their database as per their requirement

To transfer SOUL 1.0 data to SOUL 2.0 user should follow the below mentioned steps:

- 1. Create DSN to connect SOUL 1.0 Database
- 2. Create DSN to connect SOUL 2.0 Database
- 3. Select SOUL 1.0 DSN, give User Name and Password press "Connect to SOUL 1.0" button
- 4. Follow the same procedure to connect SOUL 2.0 DSN
- 5. Select the modules you want to transfer from SOUL1.0 Database as shown in figure.





xviii

- 6. To transfer Catalogue records user have to mention Starting Record No, Ending Record No and Classification Scheme.
- 7. Press "Transfer" button.

It is advisable to transfer the data module wise (i.e. first of all choose General Master, transfer all the data, then choose Acquisition master and so on) rather than transfer it in to one click.

It is also advisable to transfer catalogue data in a bunch of 1000 records (i.e. 1 to 1000, then 1001 to 2000 and so on) to increase execution speed.







SOUL or any Library Management Software will work efficiently only if parameters (rules) for each operation are set before we start using it Live. These parameters are stored in the Set-up pages and can be accessed by selecting "Administration". We must define rules (i.e. information on Vendors List, Budgets, Types of Resources, User Categories, Allocation of Accession Nos.etc), to configure the Software. Once these Rules for various processes are fed in the LMS (Library Management Software), it will function smoothly without any obstacles. Therefore, we will first set-up the requisite parameters by using options available from Administration Module.

Consult INFLIBNET SOUL Support Cell to understand the elements mentioned here and refer to Glossary at the end of the Manual. Here we can set rules and feed standard information needed for our LMS.

Select Administration from the menu which, in turn, provides following options:

User Administration

 1]
 User Settings
 2]
 Sys

 3]
 Acquisition Master
 4]
 Cat

 5]
 Circulation Master
 6]
 Ser

 7]
 General Master
 7

 User Group Password

Settings



- System Settings Catalogue Master
- Serial Master

1.1 User Settings

We can create new users of the SOUL software through this option. Requisite rights an be granted for each type of user. Please be ready with names of the users, password, module rights to be assigned to each type of user etc. You can also create a "Group of Users" to assign common rights to that Group.

1.1.1 Group

It is recommended to create user group first, i.e. circulation user can be given only circulation rights. Please keep information on library administration groups ready before the rights are allocated e.g. circulation desk staff, books processing staff, serials control staff, IT Administrators (back-ups, system settings etc) and the modules to which you would like to assign rights to each of these Groups.

Group Privilages	
Group Name	SuperUser 🔗
	Select All Acquisition Catalogue Circulation Serial Control Administration
Privilages Name	Acquisition > New Request Acquisition > Verw Request Acquisition > Grafs Item Acquisition > Select to Acporval Acquisition > Direck Oproval Acquisition > Direck Oproval Acquisition > Direck Oproval Acquisition > Cande Order Acquisition > Direck Offer Acquisition > Recheire Order Acquisition > Recheire Order Acquisition > Receive Order Acquisition > Parentes Acquisition > Catalogua > Data Operation Acquisition > Catalogua > Catalogua > Tata Operation Acquisition > Acada Operation Acquisition > Acada Operation Acquisition > InsoftExport > Export to MARC Catalogua > InsoftExport > Export MARC Catalogua > InsoftExport > Export MARC Catalogua > InsoftExport > Cotto MARC

1.1.2 User

After creating groups please create individual library system user pertaining to different groups. Rights assigned to that group will be automatically reflected to the newly created user.



Name and Passwo	ord			
User Name	SuperUser	Password		Browse
Group Name	SuperUser 🗸	Verify Password		Change
Comment				Passwor
Comment	Change Password of this user as	soon as you find		
Secret Question	What is Question			
Answer	answer			
Location				
Library	All Libraries			
	All Libraries			
Library	All Libraries	Pincode	992	
Library Address	A	Pincode Country	992	Save
Library Address City	A			Save
Library Address City State	A A 99090	Country	909	

If user is created for "Main Library" he/she will be allowed to do transactions only for that library, where as in case of "All Libraries" he/she will be allowed to do transactions from all libraries.

1.1.3 Password

Password for each user or a group can be changed through this option.

User Na	me superuser	
Old Passw	ord ******	
New Passw	ord	
/erity New Passw	ord ********	
Secret Ques	ion What is Question	
Ans	wer +++++	

Password change is allowed only when old password is entered and secret question is answered correctly. It is also being requested to change "Superuser" password by change password option in above screen.



1.2 System Settings



1.2.1 Email Settings

Email settings allows to set-up an e-mail account from where the emails will be sent to the Users, Vendors or Institutions/Departments. This also allows to set-up masters for different types of letters, like standard reminder, letters to vendor, members etc.

Please consult your system administration for e-mail parameters/ configuration.

🗱 E-Mail Configurati	on	
E-m	nail Configuration	
Domain Name	inflibnet.ac.in	
SMTP Server	mail.inflibnet.ac.in	
Authorized E-Mail ID	yatrik@inflibnet.ac.in	
User Name	yatrik	
Password	*****	
	OK Close	

1.2.2 Image Setup / Modification

You will be able to insert Institute's Logo or standard header image which will be used for any outgoing communication like Letter heads,



Membership Cards etc. The image can be selected using this option. Image uploaded through this option will be available as letter head and member card logo, If one wants to print letters on pre- printed stationary or if you don't want default image printed please select a blank picture with white background.

Image Name Image Descriptio	Letter_Header			
INFLIGNET	Information And (An IUC Of UGC Ahmedabad		twork Centr	C Update Record Image Updated
Image Path C	\Documents and Settings\Rach	ana\My Documents\ Select Image	My Pictures Vogo JPG	Close

1.2.3 Letter Layout

The following standard letters are available for use. You can also modify its text if needed, these letters will appear with Standard Header logo image uploaded using earlier option.

You will have options to modify following letters.

Letter f	or Approval
Letter f	or Approval
Cancel	lation of Order
Cancel	lation of Remiinder
Forwar	ding letter to Account Section for Serial Control Module
Foward	ling Letter to Account Section of Serials
Foward	ling Letter to Account Section of Books
Forwar	ding Letter to Vendor intimating Payment
ILL Arri	val Intimation Notice



1.2.4 Label Settings

You can design a template for the standard stationery labels – e.g. address-labels, barcode labels, spine labels of requisite size.

There are per-defined standard settings for Barcode, Book Card, Spine Label etc. You can also add new sizes as per your requirement and save them for future use.

🗱 Label Setting	s 🗖 🛛
Label Name	Barcode
Page Height	11.6
Page Width	8.3
Top Margin	0.35
Bottom Margin	0.35
Right Margin	0.2
Left Margin	0.2
No of Columns	5
Column Space	0.15
No of Rows	13
Row Space	0.1
Add	Modify Save
D	elete Close

1.2.5 Auto Letter Number Generation

This option will allow you to set standard reference, which should appear before dis patch sr.no. (e.g. INFLIB/ABD/ACQ/0809/781) in each type of standard communication you will be sending from the system. Set the reference code in this form.

Select Name		prefix	Status	
Acquisition Forwa	rd to Account Reference	ACO/ACC/YY	InActive	
Acquisition Invoice	Reference	ACO/INV/YY	InActive	
Acquisition Order		ACO/ORD/YY	InActive	
Acquisition Payme	ent Reference	ACO/PAY/YY	InActive	
Acquisition Purch	ase Order	ACO/PO/YY	InActive	
Acquisition Remin	nder	ACO/REMMY	InActive	
Serial Forward to	Account	SR/FWD/ACCY	InActive	
Serial Forward to	Account Reference	SRIACCITY	InActive	
Serial Forward to	Vendor	SR/SUPP/YY	InActive	
Serial InvoiceProc	essing	SRANVAY	InActive	
Serial Order		SRIORDMY	InActive	
Serial PrintOrder		SR/PO	InActive	
Serial Reminder		SR/REM/YY	InActive	
Serial Renewal 0	rder	SR/RENEW/YY	InActive	

In label settings only those labels which are having status as active will be displayed in letters and other communications, apart from any string, following interpretation will be taken for auto number generation, it will also append numeric sequence number after the prefix you have specified.

DD – Date (Numeric)

DDD-First Three Character of the day (i.e. MON, TUE...)

DDDD - Full Day Name (i.e. Monday, Tuesday ...)

MM – Month (Numeric)

MMM - First three characters of month (i.e JAN, FEB....)

MMMM – Full Month Name (i.e. January, February)

YY-Year (Numeric)

YYYY - Year (Numeric Four Digits)

1.2.6 Collection Type

Type of collections a library has includes Lending, Reference, Special Collection, Textbooks, Junior Books, DVDs etc.

The prefix selected for collection code will automatically appear before the accession number to separate the collection from each other in case of auto generation of accession number in acquisition. Defining collection type is also useful in case of membership category privileges while enabling "On-Premises" and "Overnight Issue" and number of reservations allowed for that category.

This is one-time information. Once we start processing the resources under each collection, changing the prefix/collection code will affect



stability of the system, please ensure you have given proper thought before assigning the codes and prefix alphabets to specific type of collection.

Prefi	×	Total Length	for Access	ion No	
	Code	CollectionTy	Prefix	TotalLength	-
•	GN	General	G	0	
	RR	Reference	R	0	
	SP	Special Coll	P	0	
	Π	Text Books	Т	0	

1.2.7 Connection Settings

SOUL application needs to get connected with database server, Using this option one can specify the connection settings. This option is applicable only if you have multiple SOUL databases, you will have to restart your application after changing the connection to have effect of new database connection.

P	lease fill DS	SN Name,User Name and Password
0	DSN Name	soul20 >> SQL Server
3	User Name	sa
	Password	****



1.3 Acquisition Master



1.3.1 Vendor Management

Vendors are the resources suppliers to the Library. Resources (stock) like Books, multi-media CDs, e-books, on-line databases are purchased by the library from these vendors. Vendor Management allows to store information about the vendors with whom the library deals frequently. The categorisation (Vendor Status) of each vendor is necessary. Providing master information will facilitate us to send letters, orders, reminders, emails etc to them. Vendors main categories are :

	Vendo	r Management	InactiveActive	
Vendor Name	A.P.H. Publishing Corporation			
Vendor Code	A,004			
Specialization				
Vendor Status	Publisher 🔽			
Address	5, Ansari Road			
	Dary a Ganj			
City	Delhi	PIN 110002		
State	New Delhi	Country INDIA		~
Contact Details	Remarks			
Contact Person				
Designation				
E-mail	aph@mantraonline.com	Fax		
Phone	3274050	Telex		



Supplier: The details of the Supplier (who is not a publisher) are stored here. Publisher: The details of the Publisher (who is not a supplier) are stored here.

Supplier-Publisher: The details of the Publisher who is also a Supplier are stored here. Blacklisted: The Supplier/Publisher/Binder are blacklisted due to various reasons are recorded here. Please do not delete the records of such parties - just categorise them as 'Blacklisted'. This will avoid any future transactions with these vendors. Binder: Choose the appropriate category (Vendor Status) when you are creating records for 'Binders' with whom Library deals with frequently.

You can always add new records to the vendors list. System will automatically assign unique identification Code for each vendor based on their status.

To Edit Vendors Details or Delete Records

Select 'Browse' from the bottom menu-bar. It will allow you to browse all the vendors, click on the desired vendor from the list and modify or delete record (if needed) and press 'Save' button.

Browse Vendors							Þ
ode	Name	_			Search Close		
Vendor C	Name	City	Country	Phone	Email	Active	F
A.001	A.P.H. Publishing Corpor		INDIA			Y	r
A.003	AABalkema	Netherlands	NETHERLANDS			Y	L
A.002	A.B.S.ublications	Panjab	INDIA	221104		Y	L
A.004	A.P.H. Publishing Corpora	Delhi	INDIA	327405	aph@mantraonline.c	Y	
AA001	Aavishkar Publishers, Dist	Rajasthan	INDIA			Y	
AB001	ABD Publishers	Rajastan	INDIA			Y.	L

1.3.2 Vendor Report

Selecting this option under 'General Master' can generate complete List of vendors. You can apply various combinations for display and search for the vendors by ticking the appropriate box(s) and selecting option from the drop-down menu.

If more number of fields are selected for display, it will be desirable to have the report in landscape, to have this, please choose landscape mode from page setup of report viewer.

Select fields to De d	Seplay on veport Vindor Code	Vendor Name	Address 💽 Contact Person	Essel/Phone No.	Specialization	Active/Inactive	Status Remain
	Select Option	Active Vendors				Display	
STREET	of 615		100% · 100%	- 14.	200100		
				Vender	-		
					s Report		
					S Report		
	Cede	Vendor Name	Address			Act./Inact.	Status
	Code 20001	Vendor Name 2000 discovery publishing house	Address 4831/24, ansan road, prahiad str.,	Report by A	Active Vendors	Actulnact.	Status Publisher

1.4 Catalogue Master



SOUL uses the MARC format. Catalogue Administration needs knowledge of MARC standard and a bit of understanding how records are identified when they are searched for any purpose. Please refer to Appendix on MARC for understanding its mechanism.

Please DO NOT make any changes in the templates or values against any field, unless you are confident of the changes you are making.

Values against each tag in the templates under Catalogue Master take care of identifying the records, separating or grouping them when the user (including staff) seeks any information from the system. These templates will be ready with values needed in a standard library practices. Please ensure you are familiar with the values against each tag in these templates.



1.4.1 Leader

MARC records can be distinguished for various types of material by the specific codes used in Leader/06 (Type of Record). The leader of a MARC record identifies number of bibliographic record types including following.

?	Language material	?	Non- musical sound recording
?	Manuscript language material	?	Musical sound recording
?	Computer file	?	Projected medium
?	Cartographic material	?	Two dimensional non - projectable graphic
?	Manuscript cartographic material	?	Three dimensional artefact or natural objects
?	Notated music	?	Kit
?	Manuscript music	?	Mixed material

MARC21 Tag Groups

Tag Group	Function
0xx	Bibliographic control numbers and coded information
1xx	Main entries
2xx	Titles, edition and imprint information, etc.
3xx	Physical description, etc.
4xx	Series statements
5xx	Notes
6xx	Subject access entries
7xx	Added entries other than subject or series and linking fields
8xx	Series added entries and holdings
9xx	Local use fields



It would be easier to understand structure of MARC format from the above broad Tag Groups. Each Tag Group has three characters followed by sub-field tags.

The leader is the first 24 characters of the record. Each position has an assigned meaning, but much of the information in the leader is for computer use. MARC record creation and editing programs usually provide a window or prompts to assist the cataloguer in filling in any leader data elements that require input. However, you can create different set of Leader for different record types.

Here you have option to create your own leader, To do that please choose the appropriate leader, modify its values and save it using "Save As" option.

These Leader templates can be used while creating bibliographic records.

took 🗸 nam a	a22 4a 4500	
Record Status [05]	new	v n
Type of Record [06]	language meterial	∨ a
Bibliographic Level [07]	monograph/item	~ m
Type of Control [08]	no specified type	~
Char. Coding Scheme [09]	UCS/Unicode	∨ a
Encoding Level [17]	core level	~ 4
Descriptive Cataloging form [18]	AACR-2	∨ a
Linked Record Requi. [19]	Related record not rea	quír 🖌 🗌



1.4.2 Fixed Field (008)

A MARC record has one Fixed Field composed of the 008 field and Leader information.

Mnemonic labels identify elements that contain coded information describing the item and the record itself. We can create standard format for Fixed Field for Books /Theses, Serials and Authority. At the time of data, if we need to change any of the elements of this template, you can do so by choosing 'Modify' option.

Books v n	gr Z	
Type of date/Pub. status [06]	Dates unknown	~ n
Illustrations [18-21]	No attempt to code	-
Target audience [22]	General	~ 9
Form of item [23]	Regular print reproduction	~ [
Nature of contents [24-27]	No attempt to code	-
Government publication [28]	Other	√Z
Conference publication [29]	No attempt to code	~
Festschrift [30]	No attempt to code	~ [
Index [31]	No attempt to code	~
Literary form [33]	No attempt to code	~
Biography [34]	No attempt to code	~
Save Save	As Delete	Close

Please study 'MARC21' format a bit in detail before you attempt to feed information in the templates provided here. If you are unsure of certain specifications, please contact INFLIBNET co-ordinator, who will suggest simplest way of using Pre-defined Data-entry template.

1.4.3 Classification Scheme

As per MARC specifications if your records are having UDC Classification Scheme, Classification Number will go in tag 080, similarly for DDC Classification Number will go in tag 082 and for all other Schemes it will go in tag 084, you can set default Classification Scheme for your library records using this option.

O 080 UDC Scheme	
082 DDC Scheme	
O 084 Other Classification Scher	ne

1.4.4 Data Entry Template

Although there are default data entry forms, SOUL 2.0 facilitates users to create their own templates for data entry.

New templates can be created for Data Entry operation if you have a specific type of material and you want to store it separately from rest of the collection.

Basically there are two types of templates :

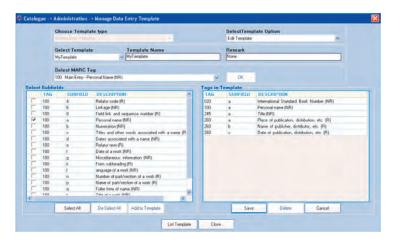
- Bibliographic Templates
- Authority Templates

Books, Serials, Theses fall under Bibliographic Templates, while Authority Templates deal with various Authority Files you wish to use while bibliographic data is entered-drop-down list along the respective fields will appear when Authority Templates are created.



Data-Entry templates for following types of collection are being supplied by default;

- 1] Books
- 2] Serials
- 3] Theses



MARC format is used to deal with these Templates. Please refer to MARC manual for understanding description for each encoded Tag. To create new template use the following steps

- First "Choose template type" you want to create (i.e. Bibliographic or Authority)
- K Then select "Template Option" Which enables you to choose any of the four options, i.e. New Template, New
- K Template Based on Existing, Edit Template and Delete Template
- In case of "New Template" enter template name, else choose existing template you want to edit/delete or create a copy.



- Now choose corresponding MARC tag and press OK button, on left hand side you will have selection options for "Subfields" in your chosen tag, select/deselect the subfields as per your requirement, and then click add to template.
- Similarly do this operations for all the tags and corresponding subfields to create your own template.

List of available templates can be seen by pressing "List Template" button.

1.4.5 Report Template

This option allows you to create new template or Add/Edit/Delete existing templates. You can select any of the field of your choice and view the report using Catalogue->Reports->Basic Report/Advance Report.

Create New Template for Report

- Choose "New Template", "Edit/View Template" or "Delete Template" from template administration option.
- Enter template name and remark fields and select the report height and width.
- K Then select the fields which you want to display from the left side list box and drop it to the report layout area.
- K You can also resize the fields which you have selected
- Please note that while entering page size one should enter size in "inches" only without specifying the unit of measurement.



1.4.6 Global Search and Replace

Global Search and Replace option can be used selectively. Information in specified fields of all the records in the database can be corrected at one 'Go' with the help this option. For example, there may be occasions when we need to replace all the Dewey Class Nos. based on new edition (e.g. 001.64 was replaced by 004 in DDC20), or may be you need to correct Subject Term which was wrongly entered in some records. You also have an option to Search and Replace individual records after ensuring that the records chosen for correction are the right ones.

i Gla	bal Sea	irch and Replace						
Selec	tTag	100 Main Entry - Personal N. 👻 Select Subfield a Per	rsonal name (NR)	✓ Word like	Sharma, R 0	£	20 🗸	Search
				Replace with	Sharma, R.C		Replace All	
					* This Operat	ion is Case-Sens	tive	
	SrNo	Title	Author	0	all No	Location	Accession No	Statu
Г	1	South Asian Urban Experience /	Sharma, R.C.	HT	147/,A8R3	SHML	196133	Availabl
Г	2	South Asian Urban Experience /	Sharma, R.C.	HT	147/.A8R3	SHML	T80201	Availabl
Г	3	Instrumental method in chemical analysis : analytical c	Sharma, B.K.	QD	76/.5416	SHML	186378	Availabi
Г	4	Instrumental method in chemical analysis ; analytical c	Sharma, B.K.	00	75/.5416	SHML	241447	Avaiabl

1.4.7 Delete Bibliographic Record (s)

Please ensure you use this option with thorough understanding of its effects and be selective in using it.

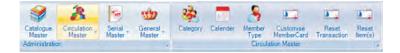
Delete Bibliographic Records will allow you to delete range of records at one stroke. This option can be used when you are sure that certain records needs deletion rather than corrections.

🗱 Delete Bibliographic Reco	Delete Bibliographic Record(s)						
Enter Record No from	100] To [199]					
	Delete Record(s)	Close					

This option is also useful in case you have imported bulk records, and you want to delete all imported records together.

To avoid mishaps of deleting records unknowingly please retain this authority only with the 'superuser' - and password should never be shared for any reason and no other user should be allowed to customise 'Administration' options.

1.5 Circulation Master



Circulation Master will allow you to create structure of parameters needed to take care of circulation operation in the library. You should have data or your member categories and privileges, list of holidays etc. ready with you before you start filling in the Circulation Master.

1.5.1 Category

Categories of various types of users are created and stored in this Master with their borrowing/usage rights/privileges.

Various Types of Users – UG Students, PG Students, PG Part-time Students, Faculty (Permanent), Visiting Faculty, Office Staff, Library Sc. Department Staff, Other Institution's Staff/Faculty and there can be many more. You will be able to set-up borrowing privileges for each type of category here.



Feed appropriate information in requisite rows and columns created for each type of category and save the data each time you update the details.

	Code 01	Category	Post Gradual	te Students			
		Duration	One Year	_		×	
	Memb	ership Charges	50	.00			
	0	eposit Amount	(0.00			
	Maximum all	owed Overdue	(.00			
	Maximun	n allowed Items					
	Cate	gory End Date	4/ 8/2048	*			
Cat	egory Deta	ls					
	Code	Description	Duration	Charges	Max Due	Deposit	^
	00	Under Grad	12	50.00	0.00	0.00	
•	01	Post Gradu	12	50.00	0.00	0.00	
1	02	Fac.Lib.U.G	12	50.00	0.00	0.00	-

Categories of members you want to create e.g. 00 for Undergraduate students, 01 for Postgraduate students, 10 for Faculty Members etc., their membership duration e.g. 1/2/3 years or may be 30 years (Life Time) for faculty members – membership subscription (if any), deposit, maximum amount can accumulate against each category towards overdue charges/any other charges; maximum no. of items allowed for various types of borrowing material and the expiry date for that category.

In the field named "Maximum Allowed Items" if no value is entered, member belonging to that category can get total number of items issued as sum of total items specified in "Maximum Allowed" for each type of material. If user enters some value as "Maximum Allowed

Items", this value will work as upper cap of total items, e.g. If you have entered "Max Allowed Item" as 3, and in "Privileges" if you have entered "Max Allowed" for books and theses as 3 and 2 respectively, In this case, system will restrict maximum issues to 3, by-passing the total allowable items as 5, So the member belonging the that category can either 2 Books and 1 Theses, or all 3 Books or 1 Books and 2 Theses i.e. limiting total number of items by 3.

"Category End Date" field can be set to semester/session end date for respective category to have auto effect in "Membership End Date" in Member Entry Form" of Circulation.

rivilege	es based on Type o	f Material	Privileges	based on	Collection	Type (Opti	onal)		
Privileg	ge Group								
	Category Name			chord.					
	Materia	Testil	Documer	45					
	Issue Period(Days)	3	0	Max F	Reserve(No	.s)	0		
	Max Allowed(No.s)		3	Resv.	Period(Da)	ys)	0		
	Phase -I	Fine			Phase -	I Fine			
	Duration (Days)		0	D	uration (Da	ys)	0		
	Charges	0.0	0		Charg	ies (0.00		
	Default Charges	1.0	0						
Men	nber Privileges D	etals							
	Category Desc	Media D	Issue Pe	Max Allo	Max Res	Reserve	Fine Pha	Fine P	17
	Post Graduate	Textual	30	3	0	0	0	0.00	
	Post Graduate	Theses	0	0	0	0	0	0.00	
	Post Graduate	Reports	0	0	0	0	0	0.00	1
	Post Graduate	Meeting	0	0	0	0	0	0.00	
	Post Graduate	Patent	0	0	0	0	0	0.00	
	Post Graduate	Standar	0	0	0	0	0	0.00	1
<						1		>	1
	Add	Upda	te	Delete	Sa	ve	Cancel		



Privileges based on type of material you can allot privileges to each category of members e.g. UG Student will be allowed to borrow Textual Documents, maximum 2 nos. for 30 days; maximum reservations allowed 5 nos., each reservation will be kept aside for them for a period of 5 days; Overdue Charges (Fine) of Re.1/- per day per item (Phase I) and Rs.2/- per day per item in Phase II. Default Charges of Fine – Re.1/- per day per item. Likewise for all the categories of members this info is necessary.

To add/modify privileges for different type of materials click on "Add" or "Update" button, choose corresponding type of material and enter values as described above.

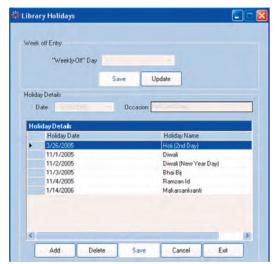
If your library has to assign Privileges based on Collection Type (optional), Click the corresponding tab and fill the requisite information.

ateg	ory Collection Details				
	Category Name	Post Gradua			
	Collection Type	General			
	"Overnight" issue	e 🗹 Maxin	io items allowed to be	e reserved 2	
	"On-premises" issue	e 🔲 Endti	me for "on-premises"	issue 4:00:00	9
C -1	In the Tree				
Col	lection Type Colletion Type	CategoryNa	Over-night issue	Dn-primises issu	Maximum Bes
Col	ColletionType	CategoryNa Post Graduate S	Over-night issue	On-primises issu N	Maximum Res
	ColletionType		and the second se	Construction of the second	
	ColletionType		and the second se	Construction of the second	
	ColletionType		and the second se	Construction of the second	
	ColletionType		and the second se	Construction of the second	

Privileges based on collection type allows you to define type of collection that can be issued to each type of category for parameters such as "On Premises Issue" and time period e.g. UG student will be allowed to borrow only "General" and "Textbooks" but not "Reference" or "Special Collection"; while faculty may be allowed to borrow all types of collection. While UG students may be allowed to borrow "Special Collection" only on the library premises up to 4.00 pm and "Reference Collection" overnight for one day (may be with faculty permission).

1.5.2 Calendar

Calendar is used for storing official public holidays declared for the library. It will allow you to select weekly-off for the library will be closed. The information stored here will be used to skip the due date of the material loaned (due date is calculated based on the privileges set for each category of member). The format for storing holiday details as follows.





1.5.3 Member Type

This option is useful especially for book bank, here one can specify issue privileges based on type of member, these parameters will have effect in "Book Bank Issue" in Circulation module. Here one can give restrictions in terms of either "Maximum Money" and "Maximum Books" or both, At some libraries issues under Book Bank is restricted by total number of books, in this case one can enter maximum books, In case if you want to restrict number of book received by the total accumulated money, enter maximum money, issues under book bank can also be controlled by specifying both the values.

The date entered in "End Date" field will be default due date for issues under book bank category.

Мах	ember Type	neta i D		m Books 5 nd Date 1503/	2010
Me	n Type details				
Mei	n Type details Member Type	Maximum Money	Maximum Books	End Date	
Me		Maximum Money 0.00	Maximum Books	End Date 5/21/2010	
	Member Type				

1.5.4 Customise Member Card

This option allows you to create new template or Add/Edit/Delete existing templates meant for printing membership number, barcodes, membership identity cards with requisite membership information etc.



The template facilitates customization of size of various data fields for membership card.

 New Templa 	le	EditView		O Delete		Report Size					
mplate Name Ne	Men	iberCard				Height	[11	-			
Remark He						Width		-			
code		Actor (career				-4.1.001		1 6	Instructions		
urse_Designation	E	InstituteName			Instruction						
tituteAddress	Ľ.	InstituteAddres	18		-						
tituteLogo tituteName	1411	MemberCode			=						
truction rarianSign			1			t MemberName					
mberAddress mberCode	÷	0	Membe	enAddress							
mberDateOfBirth	1										
mberName	2 194			LibrarianSign							
mberPhoto mberSign											
idFrom idTo											
	1										
	?										

To create template for membership card

- K Choose "New Template", "Edit/View Template" or "Delete Template" from template administration option.
- K Enter template name and remark fields and select the report height and width.
- K Then select the fields which you want to display on member card from the left side list box and drop it to the report layout area.
- If you want to print the instruction on member card, write it in the right side panel.

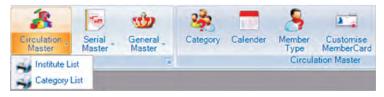
You can check the preview of the template using member card option in circulation module.



1.5.5 Reset Transaction

This operation allows user to clear transaction status of selected member, it will clear all the issued, reserved books, financial dues of member selected. This operation needs to be exercised only with administrator privileges.

1.5.6 Circulation Master Report



We can generate two reports from Circulation Masters :

- 1] Institute List (with its Depts etc)
- 2] Membership Categories List

1.6 Serials Master



Serials Master needs standard/common data elements for the periodicals, journals, newspapers, magazines and serials that a library subscribes to. There are various types of collections – like Reference, Special Collection, and Bound Volumes of these periodicals.

Information needed for Serials Master includes Names of the vendors Frequency of the serials, Delivery Modes (Airmail, Surface Mail, Courier etc) Binding Agencies and types of Serials Collections (Reference, Special, BVs, Rare) etc.

1.6.1 Vendor (Publisher/Supplier/Binder)

Serials Vendors can be of two types i.e., publishers (directsubscription) and Suppliers (Agencies). Binding Agents (Binders) is yet another types of vendor that are required for binding serials.

		O Inactive
Category:	Publisher	 Active
Code	AADICS Name AATCC	
Address	P.O.Box 12215	
	Research Triangle Park	
City	N.C. PIN	Country UNITED STATES
ont. Person		
	hallj@aatcc.org	Phone
		Phone Fax
Telex		

1.6.2 Frequency

Arrival schedule for check-in of serial is generated based on the information provided in publication frequency master. Therefore it is necessary to codify various types of frequencies of the journals subscribed by the library. Even irregular frequency is a one type of frequency – assign code for these journals. Users are requested not to delete any value from this master as it will reflect on status of a continuing publication.

			Freque	ncy Master	r		
0	Dode De	cosphon		No of fisse	Penod	Yea	
	Name	Code	Days	Months	Year	Days/Month/Yea	Issues/Yea
	Not determined		0	0	0	Y	0
	Seventy Two Time	0	0	0	1		72
	Sixteen times a ye	1	0	0	1		16
	Eighteen times ay	2	21	0	0		18
	Annual	a	0	0	1	Y	1
	Bimonthly	b .	0	2	0	H	6
	Semiweekly	c	3	0	0	D	104
	Daily	d	1	0	0	D	366
	Biweekly		14	0	0	D	26
<				-	. 14		



1.6.3 Delivery Mode

Serials are received through various Delivery Modes. Assign unique code to each type of mode – e.g. A for Airmail, C for Courier etc.

Code	Description
A	Air Mail
C	Courier
н	Hand Delivery
L	Local
P	Parcel
B	Register
S	SeaSurface
H L P R	Hand Delivery Local Parcel Register

1.6.4 Binding Type

In large libraries specific type of binding is used for ease of identification and to separate Bound Volumes Collection from other BVs. This master takes care or three aspects,

1. Colour of binding: if you want to specify colour, prefix the code with "C"

	Bindi	ng Types		
Cod	le <mark>CBR</mark> Name	Brown		
	Binding Code	Binding	^	
	CBR	Brown		Note
	CDA	Dark		Please ensure following
	CDG	Dark Green		prefix while assigning o
	COT	Others		"T" for Type of Binding "C" for Color of Binding
	CRE	Red		"E" for Embosing Type
	CYE	Yellow		
	EGO	Gold		
	EOT	Others		
	TCB	Cloth Binding		
	TCO	Comb		
	TFL	Full Leather		
	THL	Half Leather	_	
	TOT	Others	~	



- 2. Type of Binding: if you want to specify type of binding e.g. cloth, leather etc. Prefix "T" in code
- 3. Embossing type prefix "E"

Entries in above form will get reflected at time of order process for binding of serials.

1.6.5 Edition

We receive serials, which are published from India or abroad. To differentiate Indian editions from International editions, we should assign code for specific journal. All the assigned codes are stored in the Edition Master window (e.g.F – International edition, I – Indian edition, A–Asian edition, E–European edition etc).

¦€ E	dition	Master		X
		Edition	Master	
	Code	A Name	Asian	
	•	A	Asian	
		E	Eastern Economy	
		F	International	
		1	Indian	

1.6.6 Serials Master Reports



We can generate variety of reports from these masters such as: Vendor Report; Frequency Report and Delivery Report.



1.6.6.1 Vendor Report

Publisher/ Sup Parame		P.	Publisher Binder	Display	
	of 12 🕨 🔰	Vendor Man Report by Activ	agement		
Vendor Code	Vendor Name	Address	Contact Person	Status	
AA002	AATCC	P.O.Box 12215		Active	
AC005	Academic & Cultural Publications Charitable Trust	PO Box No.35		Active	

Vendor report can be generated by Active/Inactive/city wise/ status wise besides listing of all the vendors, these report can also be filtered by Supplier/Publisher/Binder.

1.6.6.2 Frequency Report

One can generate listing of all entered frequency either by "exact search" or "search by any word" within text, if you want listing of all the frequencies, in that case don't enter anything as search parameter, choose option as "Anywhere in Text" and press display button.

Search Paramet	er [•	Exact S	earch O A	nywhere in	text Displ
1	of 1 1 -	001300	- 100)%	-		1
		requency Rep eport by ' All Frequence					
Code	Frequency Name	Date/Month/Year	Issues	Days	Months	Years	
#	Not determined	Y	0	0	0	0	
@	Seventy Two Times a year		72	٥	0	1	
1	Sixteen times a year		16	0	0	1	
2	Eighteen times a year		18	21	0	0	

1.6.6.3 Delivery Modes Report

One can generate listing of all delivery modes using this report, the report parameters are same as described in "Frequency Report".

Enter Search F	Parameter	Exact Search	Anywhere in text	Display
	of 1	L 100%		- 0
	yMode Report			
Mode Code	Mode Description			
A	Air Mail			
С	Courier			
н	Hand Delivery			
L	Local			
P	Parcell			
R	Register			
S	Sea Surface			

1.7 General Master

General Master provides options depicted in menu bar reproduced below



Please ensure following info/data is ready before we start feeding information in the respective options which are self-explanatory.

- Currency: Default Currency (Indian Rupees), Conversion rates for frequently used foreign currencies.
- Institute : Master/Head/Central Institute, various Departments, Courses offered etc.



- Subjects: Standard List of Subject Headings assigned to each Class No.
- Physical Media : Various Types of material in the Library e.g. printed books, multimedia CDs, audio-visuals,charts, videos, periodicals and Bound Volumes etc.

1.7.1 Currency

Set default currency as needed – (in our case it may be Indian Rupees). Entry in "Currency Master" is reflected mainly at ordering and invoicing process. It is recommended to always update the conversion rates for commonly used currencies – may be every month. This option also allows us to add new currency with its code and its Conversion Rate, if needed. Currencies of most of the countries are already stored here with their respective codes – please note down the codes for frequently needed currencies for your Library, such as US Dollar, British Pound, Euro etc. It will be useful while entering data in Acquisition/Cataloguing.

🗱 Currenc	y Management						🛛
		С	urrency Ma	anageme	ent		
Currency	Code			Date	8		
Cur	rency India Rupee	\$	Cor	version Rate		1.00	
Co	untry India		~				
ſ	View Report	Add	Delete	Search	Save	Close	1
						1	
Curren	nc Currency		Conversion F	Rate Country		Date	^
IDR	Indonesia Rupi	ahs	0	00 Indonesia		07/08/2008	
ILS	Israel New Shel	kels	12	00 Israel		07/08/2008	
INR	India Rupees		1	00 India		07/08/2008	
IOD	Iraq Dinars		0	04 Iraq		07/08/2008	
IRR	Iran Rials		0	.00 Islamic R	epublic of Iran	07/08/2008	100

- Add : Select Currency Management -> Enter Currency Code -> Currency -> Country -> Date -> Conversion Rate -> and 'Save'. If Code/Country it will allow you to add the new currency with requisite details.
- Modify: Double click on the first column of the currency you wish to modify edit details and click 'Save'.

Delete : To delete any record, double click on first column, select the currency you wish to delete. 'Delete' button will get activated. Click it to delete the desired currency permanently from the database.

In 'Browse' mode if you click on any column in the window, the data in that column will get sorted.

1.7.2 Budget

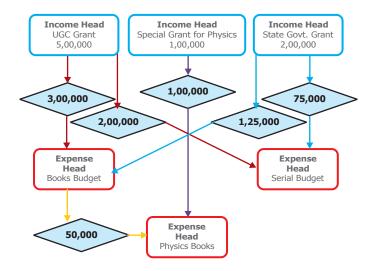
This is a crucial master. The information under various budget heads (Income and Expenditure) is stored here. In a college or a university, there are number of departments/centres. There are number of separate budgets from which a library adds resources to its collection. There are a number of budget heads. You can Add, Delete, Modify, Income and Expenditure heads. Feed information about the amounts allocated etc in this from this master sheet. Since Many decisions depend upon the latest balances available under various heads –Ensure you have correct details stored here. Access to this master should be restricted to authorised users dealing with budgets. SOUL facilitates multiple sources of Income and Expense head as explained in following case;

Let us take one practical example typical to a University Library:

In 2008-09 a university library received (Income) grants from UGC (Rs.5,00,000/-) and from State Govt (Rs.2,00,000/-), Apart from that there is a special grant for Physics (Rs 1,00,000) from some other sources. Out of this different Expenditure Heads are created based on either norms or decisions of the Library Committee. The decisions are as follows

- 1. Allocate Rs. 3,00,000/- for Books from UGC Grant
- 2. Allocate Rs. 2,00,000/- for Serials from UGC Grant
- 3. Allocate Rs. 1,25,000/- for Books from State Govt. Grant
- 4. Allocate Rs. 75,000/- for Serials from State Govt. Grant
- Apart from Special Grant for Physics (Rs. 1,00,000) allocate 50,000 more from books budget to enhance the budget for physics.





Now at the outset create three "Income Heads" by selecting 'Add' option and filling up total grants under each head. Allocate appropriate code to each of the heads mentioned above when you enter information on each fields.

	Bu	udget Hea	d	
Budget code Budget Description	-	rants Commis		gory Income Expense
	_	Save	Close	1

Now create all the "Expenditure Heads" below Income Heads – and then apportion requisite amounts to each of the heads (Income and Expense).

To receive/add amount in Income Head, please click "Add" button under income tab, you will be prompted with following pop-up entry screen in which the received amount can be entered.



	Income Budget	
Income Head	UGC SAP(R) Dept.of Archae 🗸	
Financial Year	2009 To 2010]
Opening Balance	100000]
Received Amount	0]
Total Amount	140040]
Date	21/05/2010	
Remarks		

Source of amount in "Expense Head" can be either from Income or Expense head, to enter amount in expense head, first choose "Expenditure" tab and then choose proper source of amount (Either income or expense) and fill-in requisite details as per your selection criteria.

m Income From Expen	Allocation of budget	
The coper		
	Penod From 2005 To 2006	
	Income	
	Income UGC SAP(R) Dept of v Available 0 Balance	0
	Allocation Status	
	Date 21/05/2010 M	
	Expense U- Dept Archaeology & Anci, Hist V O Inactive	
	Source O-Dept Archaeology & Anci. Hist O Inactive	
	Opening 3 Allocated Amount Total Amount	

IT staff or the library system administrator should take help of the Head Librarian or the Dy. Librarian before making any changes to the information stored here. Please remember that there are chances of getting misleading reports if the **Master information is not correctly fed-in.** Amounts of Orders, Payments made, ad-hoc grants etc are deducted or added from the opening balances stored here.



In Nutshell, To Create new Income/Expenditure Head, select 'Budget' - > On left side box of Budget Process screen click <Add>, Enter 'Code' and 'Heading' for Income/Expenditure as needed.

To Apportion amounts received against/allocated to each Income/ Expenditure Head, select 'Budget' - > On right side box of Budget Process window click <Add>, select appropriate Head from the dropdown menu, fill-up the amounts on Allocation of Budget window and <Save> to update the figures.

To Reallocate/transfer of amounts from one head to another please use 'Budget Transfer' option from the top menu Bar.

The consolidated budget report can be generated any time by selecting 'Budget Report' option.

1.7.3 Budget Transfer

There may be occasions (mainly during the last few months of the financial year) when you may have to transfer some unspent amounts of some of the Budgets to other Budget Heads. In some cases you may have to transfer unspent budgets to next financial year.

Use Budget Transfer option to make any changes in the already allocated/apportioned Budget Heads. Please note that you can also use transfer options for carry forward budget to next year within same budget head.

	Budget	Transfer		
	Transfer ID 210550000	Date 21/05/	2010	
Source Financial Year From Source Budget Available Amount	2005 To 2006 UGC SAP(R) Dept of Archaeol 🛩	Destination Financial Year From Destination Budget Available Amount	2005 To 2006 ASIHSS(NR) - Education 825739	2
Transfer Amount Remarks	50000 View Report Add	Save Close		

 \checkmark

(AN IUC OF UGC)

In Nutshell, to transfer/reallocate amounts from one Income/ Expense Head to another;

- 1] Specify Financial Year of the Source Budget Head
- 2] Select Source Budget Head from drop-down Menu
- 3] Available amount will automatically appear
- 4] Specify amount needed to be transferred
- 5] Feed authorisation information in 'Remark'
- 6] Choose Financial Year of the Destination Budget Head
- 7] Select Destination Budget Head from drop-down Menu
- 8] Save the record 'Budget updated message will appear.

1.7.4 Institute Detail



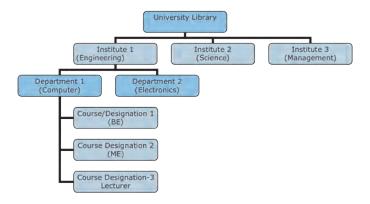
Under this master option, we store detailed tree-branch information of our Institute/University/College/Library, its various Departments or there might be separate Courses or Designations. The operations are almost self-explanatory while creating, modifying or deleting information from these records.

Please ensure following data is ready before we start feeding information.

Name of the Institution :	University / College / Centre
Names of the Faculties :	e.g. Arts, Commerce, Law, Science
Names of the Departments	e.g. Sociology, Psychology, Physics, Accounting etc.
Names of the Courses :	e.g. Under Graduate, PG Diploma, PhD, PG, etc.

Following typical University tree-structure will explain the logic observed by SOUL in creating the hierarchical relationship between various departments and its courses and the end-user. Follow top-down sequence to fill up the requisite information in required fields.





Following example will further explain the practical aspect of the relationship needs to be established to create this structure. We also need to assign Codes to each element in the tree to make it unique in the whole chain.

ci)i	re Details												
Ins	titute Details							Code	Name		_		_
	Code	Description	Address1	Address2	City	PIN	~		Haire		_		_
	AT	University Off	Opp. Drugs L	Fatehguni	VADODARA	390002		Address					_
•	A2	Faculty of Art	Station Road	Sayaiguni	VADODARA	390002							
	A3	Faculty of Co.	Opp. Kalagho	Station Road	VADODARA	390002		Chy [1.00 miles		PIN	100	
	A4	Faculty of Ed	Opp. Sayaig	Station Road	VADODARA	390002				_		_	_
	A5	Faculty of Fin	Piol C C Meh	Near Kalagho	VADODARA	390002	~	Phone	_		Fax	-	_
5							5	E-Mail			_		1.1
		Add	Update	Delete					Sava 1	Cancel			
	ment Details	may IL	obaine 1	C-CHRITO									
	artment Detail						-1	-	_				
-	Code		Addets1	Address2	City	PIN Code		Code	Name	-	_		
	01	Archaeology		A	VADODARA	390002	-21	Address					
	02	Economics	-		VADODARA	390002	- T						_
	03	English	-	a	VADODARA	390002		-	-			-	_
	04	Guarah			VADODARA	390002		CAY			PIN	-	
	05	Geman/Russ	-		VADODARA	390002	- 14	Phone			Fax.		
	44.	10.0	-	-	Linne im.	Antilia.	× 1	E-Mail					
							2	_					_
		Add	Update	Delete					Save	Cancel			
õues	e/Designation [Details											
048	ne/Designati	on Dotails						Course Desig	mation				
-	Department			Branch Descr	plion		~					Add B	and a
	Economics			Under Gradual			7.5					A00.0	44.0
	Economics			Graduate				-					
	Economics			Ph.D.M.Phil			1		Save	Cancel			
				ALL.		-	.41						
	0	Add	Update	Delete									

If the required course/designation is not available under chosen department please add it by clicking 'Add Branch" button.



Course/Designation Details

The data in this window needs to be entered with proper codes. Please ensure you have exhaustive list of all the details. You will be allowed to add new codes but you will not be able to delete any of the codes later, once you start using them in the live conditions.

In Nutshell, To Create a new Institute / new Branch select 'Add' and assign unique code, fill-up requisite details like address etc and 'Save'.

Co	de 🕅 Name	University Officier	
Co	urse/Designation Mast	ar	
	Code	Name	~
	00	University Officer	
	01	Under Graduate	
	02	Post Graduate	
	06	Ph.D/M.Phil	
	07	Diploma	
	08	BBA/BCA	
	09	LLB	
	10	BLiSc/MLiSc	
	11	M.P.A. (Master of Performing Ar	
	12	M.A.(Fine)(Master of Fine Arts)	
	13	M.A. (Master of Arts)	
	14	M.Com.(Master of Commerce)	~

To Create a new Department under that Institute/Branch, bring the highlighter on the row of the newly created Institute/Branch in the upper-window, and select 'Add' in the left middle window meant for department details – assign new code and feed address etc and Save'.

To Create a new Course/Designation under new Department, bring the highlighter on the row of the newly created department in the bottom window, and click 'Add Branch' in the right window – after feeding appropriate information, click 'Save'.

To Update (or Edit/rectify) information in any of the records, follow the same steps mentioned above, but click 'Update' instead of 'Add'. Please do not forget to 'Save' corrected/updated details.



To Delete any of the branches, follow the same steps mentioned to Add/Update information, but click 'Delete' to remove the record from the database.

'Please remember – SOUL will not allow you to delete the Institute unless the department and branches below have no records, i.e. the institute will be deleted only if there are no members, no course/designations/department, entered below the respective head.

Reports / Lists

You can always generate master list of the records under institute details by selecting institute report.

1.7.5 Country Master

You can choose default country by selecting this option. You can 'Add' new country and it's code by feeding information here. You can select default country by ticking the box against the country code.

Country Code Country Name af Afghanistan alu Alabama aku Alaska AL ALBANIA aa Albania ABC Alberta ae Algeria	Country Code Country Name af Afghanistan alu Alabama aku Alaska AL ALBANIA aa Albania ABC Alberta	Country Code Country Name af Afghanistan alu Alabama aku Alaska AL ALBANIA aa Albania ABC Alberta ae Algeria DZ ALGERIA		Counti	ry Master	
 ▶ af Afghanistan alu Alabama aku Alaska AL ALBANIA aa Albania ABC Alberta ae Algeria 	af Afghanistan alu Alabama aku Alaska AL ALBANIA aa Albania ABC Alberta ae Algeria	af Afghanistan alu Alabama aku Alaska AL ALBANIA aa Albania ABC Alberta ae Algeria DZ ALGERIA	e 🔺	Name Afgliant	slam	
aluAlabamaakuAlaskaALALBANIAaaAlbaniaABCAlbertaaeAlgeria	alu Alabama aku Alaska AL ALBANIA aa Albania ABC Alberta ae Algeria	aluAlabamaakuAlaskaALALBANIAaaAlbaniaABCAlbertaaeAlgeriaDZALGERIA		Country Code	Country Name	
aluAlabamaakuAlaskaALALBANIAaaAlbaniaABCAlbertaaeAlgeria	alu Alabama aku Alaska AL ALBANIA aa Albania ABC Alberta ae Algeria	aluAlabamaakuAlaskaALALBANIAaaAlbaniaABCAlbertaaeAlgeriaDZALGERIA		af	Afghanistan	-
AL ALBANIA aa Albania ABC Alberta ae Algeria	AL ALBANIA aa Albania ABC Alberta ae Algeria	AL ALBANIA aa Albania ABC Alberta ae Algeria DZ ALGERIA		alu		
aa Albania ABC Alberta ae Algeria	aa Albania ABC Alberta ae Algeria	aa Albania ABC Alberta ae Algeria DZ ALGERIA		aku	Alaska	
ABC Alberta ae Algeria	ABC Alberta ae Algeria	ABC Alberta ae Algeria DZ ALGERIA		AL	ALBANIA	
ae Algeria	ae Algeria	ae Algeria DZ ALGERIA		aa	Albania	
		DZ ALGERIA		ABC	Alberta	
	DZ ALGERIA			ae	Algeria	
DZ ALGERIA		as American Samea		DZ	ALGERIA	
as American Samoa	as American Samoa	as American Samua		26	American Samoa	
		an Andorra		an	Andorra	and a
	as American Samoa			aa ABC ae DZ	Albania Alberta Algeria ALGERIA	



Codes have been allocated to all the countries of the world. If you have to 'Add' new country then this option can be used. If you need to delete any country for any reason click on the country code line and click 'Delete' and click 'Save' to effect the change that you have made in the master records.

1.7.6 Language Master

You can choose default language by selecting this option. You can 'Add' newlanguage and it's code by feeding information here. Codes for most of the languages of the world are already fed in. You have option to Add' and 'Delete' any of the codes for the language. Language entered here will be available for your bibliographic records.

Co	de Name		-
	Language Code	Language	^
	aar	Afar	
	abk	Abkhaz	
	ace	Achinese	
	ach	Acoli	
	ada	Adangme	
	ady	Adygei	
	afa	Afroasiatic	
	afh	Afrihili (Artificial language	
	afr	Afrikaans	
	ain	Ainu Aljam?a	
	ajm		
	aka	Akan	

1.7.7 Subject Master

Screen under this menu-option allows you to feed Class No. to take advantage of the subject searches conducted and also to pick-up Subject-Heading while creating records for the titles added.

This is a unique facility of SOUL. Standard Keywords, Subject Headings fed-in Classification Master will be automatically picked up and placed under 'Uncontrolled Terms' (subject headings) when new record is created for the resource titles. It is just like an Authority File for



subject terms. This will automatically help in selecting standardised terms for the subject catalogue.

Please ensure that the selection of terms is done under proper supervision. Data-entry staff should not coin new terms, but invariably use the one mentioned against each Class No. Following example of '658' General Management from DDC will be helpful in understanding its utility, for example, for adding resource on Marketing Management - and assigning 658.8 as DDC Class No. - key terms appearing in this master - i.e. Marketing Management will be picked up from here and will be placed under MARC21 field for SubjectAdded Entry Tag : 653 \$1 (Primary).

	Clas	sification Master	
ssification (Code Dem	Subject Name	Conversions
	Classification Number	Subject Name	*
	928	(Optional number)	
	660	Chemical engineering	
	752	. Color	
	034	. Encyclopedias in French,	
	468	. Standard Spanish usage	
	AP 2.A5	A.I.R. Selections	
	HD 1484.N3	AAEA Newsletter	
	AP 95.M2A2	Aaj Cha Sudharak	
	QB 1 .A2	Aakashganga	
	PK 2901 .A2	Aarnyakam	
	AP 95.68A27	Aarsi	
	HF 5601 .A2	Abacus	
	7671 42	Aboila	*

For smaller libraries, this facility will help in standardising terms and variation in spellings, grammatical variants, and data-entry operating errors can very well be avoided. Please remember, this utility is mainly provided for those libraries where technical processing of documents is handled by a few and in- depth subject analysis of the documents is not needed. In larger libraries, where in-depth analyses of documents is done, use of MARC21 other Subject Added Entry Tags under (6xx) like Topical Terms (653) or Faceted Topical Terms (654) or as per the organisation's needs, is recommended.

In Nutshell, To Add new Class No. with Subject Headings, click 'Add' button, feed Class No. and Subject Heading and click 'Save'.



To Modify any Class No., you will have to delete the entry for that Class No. and add new Class No. with appropriate Subject Heading(s).

To Delete any Class No., just select the row and click 'Delete' button.

Please ensure you have all correct Subject Headings against each Class No., including its spellings before you start data operation.

1.7.8 Physical Media Master

You have to assign specific codes to variety of items (resources) to the type of stock library has. These codes will be used later when individual records for various items are created. You can add new codes, using this option.

It is also recommended not to delete any existing codes as it may affect stability of the circulation system, as circulation rights are defined in context to type of material.

	Physical	Media Master	
Code	Descripitor		
	Code	Description	
	990	BoundVolumez	
	030	Braille	
	100	CD-ROM	
	145	Irregular Serial	
	050	Laser/Optical	
	040	Magnetic	
	115	Meeting Documen	
	150	Monographic See	
	900	Others	
	135	Patent	
	105	Reports	
	140	Standards	
	010	Textual Document	
	020	Theses	

1.7.9 New Library (for Inter Library Loan/External Institutional Members)



You can add Library/Institute that becomes a member of our library. To facilitate Inter Library Loans, one should feed details of that Library/Institute. The details to be fed are self-explanatory.



This window can be used when library loans out material in bulk to another departmental library - e.g. Long-Term Loans or Transfers. In such cases ownership of the material is not transferred but they are made available from another location – til designated period.

LBray Code New SMI Bays New SMI Bays Code LBray Mane Op Basis Op Basis Op Basis Op Basis Code Te Op Basis Code Te Op Basis Code Te Directors Free Te Et Manuak Intillydoo com Remarks Statis DarMontolization Free DarMontoli Free	
Norme SMT Botty Andress If converting company Orig Book Pitter Frame Pitter Pitter Pitter Pitter Pitter Pitter Pitter Pitter	
Martines Million Address Million Otty Backs Phone Far Librarian Reference No. Kanal Instant Period/Barya Million Nonexet No. Kanal Instant Period/Barya Kanal Instant Period/Barya Kanal Instant Period/Barya Kanal Instant Period/Barya Kanak Instant Period/Barya Kananta	
Cary Badds PM	
Phone Pare Type of Material Carliert Reference No. Income Feended(Rpore) Income Feended(Rpore) Educt Income Feended(Rpore) Income Feended(Rpore) Income Feended(Rpore) Educt Educt Income Feended(Rpore) Income Feended(Rpore) Income Feended(Rpore) Educt Educt Educt Feended(Rpore) Income Feended(Rpore) Income Feended(Rpore) Educt Educt Educt Feended(Rpore) Feended(Rpore) Feended(Rpore) Educt Educt Feended(Rpore) Feended(Rpore) Feended(Rpore) Educt Educt Feended(Rpore) Feended(Rpore) Feended(Rpore) Educt Educt Feended(Rpore) Feend(Rpore)	
Librariani Reference No. Control To 5/21/2048 10 Reference No. Reference No.	
Librariani Reference No. Control To 5/21/2048 10 Reference No. Reference No.	
Control Contro	-
Litter from To 5/21/2048 Max Allowed(Mox) Free Charges E Mail ImtRlybridge.com Max Allowed(Mox) Max Allowed(Mox) Free Charges Bemarks E Max Allowed(Mox) Max Allowed(Mox) Free Charges Cold New Address City FNI Free Lity Name Hesta Desci. Max Allowed Tree Charges DC/F001000 Part III & Durked Desci. Bard Allowed Tree Charges Databard Tree Charges Databard Tree Charges	
Katal ImfOyelos com Katal ImfOyelos com Katal ImfOyelos com Katal ImfOyelos com Katal InfOyelos com Katal InfOyelos com Katal InfOyelos com Katal Information Com Name Address Day Fills Proce LongeName Head Second Head Nece Train LongeName Kedda Nece Train	-
Berninks ILL Privileges Datak LL Mender Datak ILL Privileges Datak Code Name Address Day DUPROVIDO VILK 06 bands DUPROVIDO VILK 06 bands	_
LL Mindburg Landah Code Name Address Dry FNI Prove I DCPR01000 PUT KD & Bundba bandba	
Code Name Addess Day PN Phone I Library Name Media Desce Max Allowed Fine Charges DL/PRO1003 Pol T K G Ib basede basede Part S SSMT Barry Textual Docu 10 0.00	
Code Name Addess Day PN Phone I Library Name Media Desce Max Allowed Fine Charges DL/PRO1003 Pol T K G Ib basede basede Part S SSMT Barry Textual Docu 10 0.00	-
DCPRO1000 Port II. R.D. B. bands bands	IstuePeriod
usSM1001 (SSM1 Bray (MS unversity (Banda	360
s e	-
	_
Add Update Delete Save Cancel Add Update Delete Save	Cancel
Ent	

To create new Institutional Member -> select Add -> fill-up requisite details of the institute and 'Save'. The new Institute will be created. To assign 'Privileges', highlight the institute in the left box and click 'Add' button appearing in the right box. Feed details like Type of Material, Maximum Loan Period, Maximum number of Items allowed and overdue charges – 'Save' details. Updated information will appear in the row against the institution.

To Update details of any existing institutional member, in the left box highlight the row in which institution's name is appearing, click 'Update' – correct details as needed – and click on 'Save'.

To Update privileges, follow the same process, but click 'Update' in the left box and correct the details – do not forget to 'Save' it.

It may be noted that if you have created any "Departmental Library" using will appear in the Circulation > Transaction > Book Transfer option as well it will also get displayed as "Coded Location" while feeding-in "Location" details in Catalogue.

It may be noted that if you have created any "Departmental Library" using will appear in the Circulation > Transaction > Book Transfer option as well it will also get displayed as "Coded Location" while feeding-in "Location" details in Catalogue.



In Nutshell, To Add new Institute as a member, select 'Add' option from left column of the window. Feed appropriate details and click 'Save'.

To Edit/Update details of the existing institute, select 'Update' option from left column of the window, update/correct the details and click 'Save'.

To Delete record of any institute, click on the institute appearing in ILL member box, and click 'Delete'. 'Are you sure' message will appear. If there are any records/transactions pending against that institute, you will not be allowed to delete the record for that institute.

ILL privileges are to be entered in the right column of the screen provided.

1.7.10 General Master Reports

You will be able to take out the following reports from this General Master by clicking respective button under the General Master menu.



Currency Report

To display all entered currency, their codes and conversion rates

Budget Report

To see current status of each budget head.

Budget Transfer Report

For listing of all budget transfer operation carried out between specific period

Institute Report.

To see hierarchical list of Institutes, Departments and Branch within each institute



2.0 Acquisition

The library acquires resources based on suggestions/ recommendations made by its users (in use of Academic Libraries) faculty/library committee members/students. Some libraries do select resources proactively by analysing statistics extracted from MIS (Management Information System) and going through the publishers lists or their websites.

Main task of the LIS staff is to input the suggestions/ recommendations received, into the system along with the name and/or membership number of the user (faculty/student). This helps us in informing the requester as soon as the suggested item is added in the library or its current status. Therefore before creating the suggestion record, you should have following information ready with you:

- Accurate name of the author and correct title of the item ĸ (along with other details like edition, ISBN, broad subject, year of publication, type of document etc)
- ĸ Name of the faculty/student (along with the Membership No./Department)
- Budget details (Department Budget / Central Library ĸ Budget / Faculty Budget etc.) along with budget code against which purchases are to be made
- Now click <Acquisition> and select the first option <Suggestion Management>, you get following screen with sub-options:



- 1] Request
- 3] Select for Approval
- 51 Direct Approval
- 2] Gratis Item 4]
 - Approval Process
- 61 Export/Delete Rejected
- 71 Letter of Approval



From these sub-menus you will be able to successfully manage the complete process of ordering, right from creating records for suggestions received, to placing the order with designated vendors.

2.1 Suggestions

This module deals with suggestion management comprising of request processing and the approval of the same.

2.1.1 New Request

It is assumed that you have filled up 'Master' information of currency, departments, vendors, etc (if not, please select option under Administration –> Acquisition Master etc. and create requisite Master Records for each of the options).

* Acquisition >	Suggestion > New Reque	est Entry					
		New Re	quest				
Requester's Deta			000		_		
Request No.	10546	Reference No.	998	-	Dat	e 21/05/2010	~
Department	Accounting & Financial Ma	anagement	Reques	t Status	Requested	1	×
Requested By	AADARSH NAIR (0020010	080549)	Y 8	upplier			
Item's Detail					-		-
Title	The Book On Acquisition					Duplicate Chee	*
Author's First	Divyakant	A	uthor's Last	Name V	aghela		
Publisher	A. P. H. Publishing Corpo	ration-			_		~
Type of Material	Textual Documents	Y		ISBN	8265981	546	
Edition	2nd			Year	2009		
Currency	India Rupees	~		Price			300
No. of Copies	1 Convers	ion Rate	# 0.0	Total			20
Budget					Ignore B	udget	
Remark							
	Add D	elete Brot	wse	Save	Clos	e	

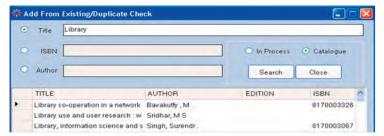
Now select 'Request' from the options and you get following screen for creating records for the suggestions received:

SOUL will automatically allocate system-generated unique sequential Request No. You have an option to feed date of request and the department (from the drop-down menu) and other requisite details.



If you want to process requests for "On Approval" items, you are requested to choose request status as "On Approval" in this case you will be prompted to select supplier from whom you have received "On Approval" items.

Before you process any new addition request – please ensure that the title is not already on order or on stock. Feed details of the requested title and select 'Duplicate Check'. 'Duplicate Check' can be performed by selecting one option or variety of combinations of 'Title', 'Author', 'ISBN', 'In Process', 'Catalogue'. 'Duplicate Check' should be done to take decision on whether the suggested title is already on our stock or in 'On Order' file. 'Duplicate Check' examples:



If user wants to enter request for same title again, the data can be obtained in request window by double clicking the desired title.

Once you decide on the suggestion, select 'Save' if 'Suggestion' is accepted and library has process it further for "Approval".

In case if you want to modify existing suggestion, please choose browse button, here you can filter out particular requests by various criteria e.g. Request Number, Requester, Department, etc.

S	earch By					
	IIA.	Y Request				
		Requester				
		Department			Search	
	RegNo	Title	Author	Editio Publishe	r	
	RegNo 4389	Title Organizational behavior	Author L.M. Prasad	Editio Publishe Latest Sultan Cl		1
•		Trees a	L.M. Prasad	and a second second second	hand	
•	4389	Organizational behavior	L.M. Prasad P.L. Mehta	Latest Sultan Cl	hand hand	
•	4389 4390	Organizational behavior Managerial economics - An	L.M. Prasad P.L. Mehta o Y.K. Bhshan	Latest Sultan Cl Latest Sultan Cl	hand hand hand	



Always remember to 'Save' the request – else the record will not be created.

2.1.2 Gratis Item

'Gratis' is a donation of document to the library – and you need to accession it. The details required from the screen shown below are straightforward. It would be a good idea to print slips ready with details needed for such additions – it will help in putting the data accurately without wasting time on looking for the details in each case.

Acquisition > S	uggestion > GratisItemEntry	
	Gratis Item(s) Entry	
Request No.	Sir Sayajirao Charity Date 21/05/2010	~
Item's Detail	Yugdrashta Sayajirao	
Author's First Name	Author's Last Name Bansidhar	
Publisher	Sarthak Prakashan 👻	
Type of Material	Textual Documents V ISBN	
Edition	Year 2001	
Currency	India Rupees Y Price 200.00	
No. of Copies	1 Conversion Rate Till Total 200	
Remark		
Add	from Existing Add Browse Delete Save Close	

2.1.3 Select for Approval



The next natural step is to get the received suggestions approved from the concerned department or the librarian or the library committee. You may not send all the suggestions for approval to one department/ committee – and, therefore, you will have to select the option Select for Approval' from the menu under Suggestion Management. This operation will allow you to select suggestions received for a specific department or to be charged to a specific budget-head. Choose



appropriately and 'Save' the approval list. You will be able to generate approval lists, department-wise or budget-wise. Once you get the department approval or budget-holders approval, you will initiate the approval process – to take care of final steps in placing orders.

			Select Fo	r App	oroval			
F	Filter All	Department Budget	-		Se	arch		
sel	Title	Author	Requester	Editio	Publisher	ISBN	Price	Department
Г	Clinical trials by Shapiro	Shapiro	HEAD - Statistics	Latest	Dekker		115.00	Statistics
T.	Human biology by Muder S	SSMuder	HEAD - Zoology		McGraw-hill		24.95	Zoology
F	Human biology by Boyle	Boyle	HEAD - Zoology		Collins		24.99	Zoology
1	Ecology of a changing plant	M B Bush	HEAD - Zoology		Prentice Hall		80.00	Zoology
E	Vertebrate biology by Linze	Donald Lin	HEAD - Zoology		McGraw-hill		20.95	Zoology
F	Analysis of biological develo	K Kaltnotf	HEAD - Zoology		McGraw-hill		29.95	Zoology
1	Zoology by Miller	Miller	HEAD - Zoology		McGraw-hill		24.95	Zoology
F	Principles and practice of so	N Dutta	HEAD - Zoology		Kanishka Publisl	he	1100.00	Zoology
	Biology by Miller	Miller	HEAD - Zoology		Prentice Hall		78.00	Zoology

2.1.4 Approval Process

Once you send the list of selected suggestions for approval to the library committee/department, you may receive approval for all the titles or a few may get rejected or may remain on Hold till next budget etc. Select 'Approval Process' to sort out such titles.

'Approval Process' consists of two steps for each title:

- [i] Approved budget selection and no. of copies approved and
- [ii] Approved by (either a Library Committee meeting date, etc).

Click the box against titles(s) approved and fill in the approval copies.

Now as second step in 'Approval Process' you have to fill up details like 'Approved By'. For this purpose click 'Approve' – Pop-up Box of 'Approved By' will appear. Fill up appropriate details – and also the 'Remark' – meeting date / name of the officials etc. and click 'Save'.

This completes the process of 'Approval' – now the titles will be treated as 'To be Ordered'.



Please remember to follow the 'Approval Process' for all the titles entered using 'Gratis option'. Only 'Approved Gratis' items will be placed directly under 'Accessioning' pool skipping 'Ordering/Receiving' process as gratis items doesn't requires ordering and payment.

2.1.5 Direct Approval

There are some occasions when routine Approval procedure is bypassed based on recommendations committee, some titles can be ordered by following 'Direct Approval' process. Select 'Direct Approval' from the menu – and fill up the requisite details. These items will directly treated as 'To be Ordered'. Please ensure you fill up the details like 'Approved By' and 'Remarks'.

lequester's Deta		Direct Ap	proval		
Requestor's Deta Request No.	73	Reference No.	int/01/013	Date 21/06/2	2010 💌
and the second s	Accounting & Financ	al Man 👻			
Requested By	AADIL PURAWALA	002001083596)			-
em's Detail Title	Discovery Of India			Duplicate	Check
Author's First Name	Divyakant		Author's Last Name	Vaghela	o chock
Publisher	A. P. H. Publishing C	orporation-			~
Type of Material	Textual Documents	v	ISB	N 895643215	
Edition	2nd		Ye	2009	
Currency	India Rupees	*	Pric	•	200
Requested Copies	0	Conversion Rate	LOS. Tot	al	0
Approval Date	21/05/2010 🛩	Approved Copies	0 Budg	et 2008 Binding Du	mmy(2 🛩
Approved By					
Remark					

2.1.6 Export & Delete Rejected Item

You may now select 'Export & Delete Rejected Items' which are not

likely to get ordered/ approved in future. A report of the ticked titles can be generated by clicking the 'Export & Delete' button.





2.1.7 Letter of Approval

Another report allows you to send a letter of approval – to titles selected by department wise or date-wise, etc.



Approval Letter								
o, Ir.APALAK SHAH 302001081795) 5, BARODA KAMDAR SO, EAR MAHAKALI SO, AJWA 30AD ADDDARA - 390019 hone mail:								
Subject : Approval letter								

Now you are ready to place the Orders for approved books. You will be able to generate appropriate reports, lists, send acknowledgment letters with the help of other options available under 'Suggestions' Management.

2.1.8 Request Listing

You can generate a complete report on status of each 'Request'. Select 'Report Listing' from a bottom menu of 'Suggestions' icon. Look at the 'Status' column on the right of the Report – giving you complete picture of 'Requests' under process.

		Title Author	Publisher 🕑 Year	Ednio	n i Price 💌 Bud	get Code 🔲 Currency 💽 Status 📄 No. Of Copies
	ction Criteria ect Option Statuswise	+ Se	lect Status App	roved	1	Date Between 21/05/2010 S Display
	1 of 6	***		t of R	equests	
			Cieby	er ut era	an	
No	Title	Author	Publisher/Place	Year	Budget Head	Status
No 45	Title Trading ans exchanges	Author Harris L	Publisher/Place Oxford University Press, INDIA	Year 2003	Budget Head UGC SAP (NR) Dept of Edu & Adm.	Status Approved



2.2 Order



The titles brought into the system through 'Suggestion Management' are now ready for placing orders.

Orders Management allows you to

- i] Place new order (which have passed through Approval Process)
- ii Place new order directly
- iii] Print/e-mail purchase order (with desired options)
- iv] Send reminder letter to vendors (for non-supply of orders)
- v] Cancel any specific order

Before you activate 'Order Management' process, please ensure data for all the vendors is already fed-in Acquisition Master under Administration Module.

2.2.1 New Order

Now select 'New Order' from the menu appearing after clicking 'Orders' and you will move to order process with following screen.

Order Detail	14	0	der No ord	0.00000	Defer Date	21/05/2010	a	
		Granth Bhandar			Expected Date	and the second second		
Supplier Det		grana griandai	-		-			
AddressT		-						
Address2	Autom Sar							
City	Galera	S	tate		Country NO		-	
PinCode	100007	En	nail					
Title	Author	Currency Na	Order Price	Conversion Rate	NetPrice Bu	dget	Approve	Order Co
Who's who in international		United Kingd		81.40		C SAP(R) Fac. of		
A hundred years of english Macro economics and the r	Milkov	Euro United Kingd	69.95	56.30 83.70		HSS(NR) - Pol.Sc C SAP(R).Dept.of		
	Decinoare	Chines range	40.00		4105.520 00	Con (), Copres		



Order No., Order Reference, Order and Date are generated automatically based on the information provided in the master.

Now you have to place orders for the approved titles to different vendors depending on their 'Specialisation', e.g. some vendors specialise in supplying only IT books, some on social science, engineering, etc. Select the vendor from the drop-down menu with whom you wish to place the orders. Vendor's address and other details will automatically appear in the fields (as you have fed information in Vendors Master records).

			Add Iter	ns					
	F	ilter All 🗠 Der	artment		1				
			Budget Supplier			Search			
sel	RequestNo	Title	Author	Edition	Price	Publisher	ISBN	Appre	r
F	45	Trading ans exchanges	L Harris		695.00	Oxford University		1	1
-	55	What the future holds	R.N. (ed.) Coope		45.00	MIT Press		.1	
Г	73	Dictionary of economics	Narayana Swam		275.00	Prentice Hall Of I		1	
F	87	Effective Public Relations	WMK Trochim		199.00	Wiley-Dreamtech		1	
Г	1260	Taxmann's Direct taxes law a	V.K. Singhania	Latest	360.00	Taxmann Public		5	
-	1288	Principles of Labour Economi	J. Werner		695.00	Cambridge Univ		.1	
Г	1320	Islamic art	Barbara Brend		16.99	The British Muse		1	
5	1418	Student's guide to income tax	V.K. Singhania	Latest	260.00	Taxmann's allied		5	
1	1430	Introducation to bioinfrmatics	A.M. Lesk		295.00	Oxoford Universi		1	
Г	1440	Noncultarable micro organiso	2000		95.95	ASM Press		1	5
-	1110	Molocular call biology	I odich	Eth ad	** 00	Eroomon	_	1 3	1

Select 'Add Items'. Following screen will appear:

You have a choice to filter approved titles by department, budget, or a supplier. Select all or tick only the required titles for a specific vendor selected from earlier window. For example you may like to place order with Globe Publications for IT related titles from the above list. Tick mark only those titles and select 'Save' to proceed to the next step in placing the orders.

Once you finalise all the titles for order, please check the values of currency, conversion rate, copies to be ordered etc for each title. Press "Save" button to complete the process.

This will update the 'Order' file and you will either be able to print the orders and send print copy to the vendor or through e-mail.



2.2.2 Cancel Order

Before finally sending the orders, if you need to Cancel any of the titles from the generated 'Orders' – choose 'Cancel Order' and tick the items which you want to delete from the 'Order'. Cancelling Order is also necessary to release the committed budget blocked by the unsupplied orders, (specially for books that vendor is unlikely to supply).

			Can	icel O	rder				
	Order No ord/	nl/090		~	Date	21/05/2010	2		
sel	Title	Author	Publisher	Edition	Year	ISBN	Copies Order	Total Receive	Pending C
Г	Macro economics and th	Backhouse	Oxford Unive		2000		1	0	1
Г	Services and the knowle	Boden Mark	Continuum		2000		1	0	1
Г	Clinical trials by Shapiro	Shapiro	Dekker	Latest			1	0	1
Г	Human biology by Mude	SSMuder	McGraw-hill		2002		1	0	1

2.2.3 Direct Order

There may be occasions when you will have to place 'Direct Orders' with specified vendors, bypassing suggestion and approval process. SOUL allows you to do that with the help of 'Direct Order Process'. Following window deals with 'Direct Order' processing. Select vendor from the drop-down menu and enter expected date of delivery.

		Direct	Order Pro	ocess						
Order Details Sr No	1141	Order N		D/INF/01	Order Date	21/05/2010	~			
Supplier	Acharya Book &	Shringar Centre		~	Expected Date	21/05/2010	4			
Supplier Det										
Address1 Address2	Cop Seam Ch	ema					_			
	Garpena	State	CORN &		Country 104		-			
PinCode	pedro)	Email		_						
Title	Author	Order Copie	s Currency Na	Order Price	Conversion Rat	te Net Price	Budget			
]	Add Item Re	move Item	Save	Close	Total	0			

'Add item' will open the pop-up 'Direct Approval' window to place the direct order. You need to have Direct Approval (either from the Library Committee or the Head of the Department or appropriate authority). Mention the details in appropriate fields including budget details etc and Save.

The remaining steps are the same as in case of placing 'Orders'.

Now select 'Order Management Report' from the menu under order management. You will be able to print this report or even be able to send an e-mail attached with this report to whosoever you want to. You can also export / save the report in Excel or .PDF format. Filter on 'Orders' - 'Generated', 'Cancelled', 'Completed', 'Partial' can be applied as required.

You will be able to 'Print Order' by selecting appropriate option from the 'Order Management' menu. To 'Print Order' (or other reports), follow the options under "Order Management Report" that are self-explanatory.

All the reports have a facility to browse pages, print, save etc with appropriate buttons appearing on top of the report window.

Order	Manag	ement Report		-		_	_	
Select	option	Generated *			Date Between 21/05/2	010 💌 And 2	1/05/2010 💌	Display
		1 #10000		• 100%	81	-		_
			Manageme y Generated stat					
Örde	r No	Supplier	Price	Order Date	Status			
E 01	d/inf/09	0 Allied Publish	r 214.9	3 5/21/2010	Ordered			
	SrNo	Title	Author	Edition	Publisher			
	1.	Macro economics and the real world VOL1 by Backhouse	Backhouse		Oxford University Press			
	2	Services and the knowledge based economy by Mark Boden	Mark		Continuum			
	3,	Clinical trials by Shapiro	Shapiro	Latest	Dekker			
	4.	Human biology by Muder S S	Muder		McGraw-hill			
		21/05/2010 by SOUL 20			1.	л		

2.2.4 Purchase Order

Purchase orders can be generated with order number/date or vendor.

1 (1 d 1 1 - C 2 3 🖸	100%	×.		
Purch	ase Order			
		Order Date:	21/05/2010	
ied Publisher Pvt.Ltd.		Expected Date:	21/05/2010	
Prarthna Flats, B/H. Shilp Bldg.,				
rdar Patel Marg,Navrangpura,,				
jarat 380009,				
medabad,				
iedadad1@sanchamet.in				
Subject : Purchase Order No.or	d/inf/090			
ar SarMidam Delaate supply the item(i) as microset avancted date as profolking, condition u should be responsible for it and yor will have to set edition are to be supplied fac case may be. 2 errencies. These should be converted in accordance ply is sent by post, the books should be cert per oks supplied must be physically in order, otherwin though as the barrain.	Please note that any operative cost of returning The price should be indi- e with approved conversive registered post. V.P.P. v wise these will be return	discrepancy if found the books. 1. Book cated in the original sion rate of GOC. 3. will not be accepted. ed to you at your own	in supply, is of the If the 4. The	

2.2.5 Reminder Letter

This report can be generated either by supplier or expected date of receipt of item(s).

Reminder Letter	
Select Suppler Acharya Book & Shringar Centre 🔍 🖬 Expected date upto 📰 🖉 Display	
1 # 2 > N = = = = = = = = = = = = = = = = = =	
Reminder Letter	
Referance No:	
To,	
Acharya Book & Shringar Centre	
At. & Po. Kadiyadara	
Ta Idar, Dist. Sabarkantha	
Gujarat 38344D	
Kadiyadara	
Subject : Reminder letter OR/UL/390 Dated : 03/03/2004	
Dear StifAtadam, This has reference to our orders as per following details, for supply of books. The delenery data is alredy over. You are requested to supply the same within 7 days failing which order is table to be canceded. Yours failfully, (Librarian)	

2.2.6 Order Report

There are a number of options to list checked order, list of orders can be generated according to status i.e. All orders Generated orders, Completed orders, Cancelled orders, Partial orders as well as supplier wise list.



2.3 Accessioning



The natural sequence of operation after placing orders is 'Receive the Items' from the vendors. Vendors will start executing the orders either partially or fully. The accuracy is of paramount importance – when we 'Receive Order(s)'. Title, edition, author, publisher, price, ISBN – all details should be fed-in correctly. If there is any variation between the title ordered and title received, you have to enquire with the vendor and may have to get appropriate approval if the supplied book is to be accepted or not. However you can always receive titles less then order and pending titles can be received later using same process.

2.3.1 Receive Order

The titles for which orders have been placed will appear when you select either supplier's name or order no. You also can tick the box for all orders if you are not sure of either.

Find the titles, which were received – tick the box, fill-up no. of copies received. On the bottom menu-bar title summary will appear with requisite details. After ensuring that all the details are correct, click 'Receive'. You also have an option to choose to 'Receive Entire Order' – if all the titles against that order have been received and are supplied appropriately.

			Receive	Item(s)			
	Supplier Name	Allied Publis	her Pvt.Ltd. 🛛 👻	All Orders			
	Order No.	ord/inf/090	~			Enter items in	n Receive Now
	sel Title	Author	Publisher	ISBN/Year/Edition	Ordered Co	Prev.Receiv	Receive Now
	Macro economics and th	Backhouse	Oxford University	/ 2000 /	1	0	0
	Services and the knowle	Boden Mark	Continuum	/2000/	1	0	0
	Clinical trials by Shapiro	Shapiro	Dekker	/ / Latest	1	0	0
	F Human biology by Mude	SSMuder	McGraw-hill	/ 2002 /	1	0	0
n le	Summary Macro economics and the	real Ordered	l Copies 1	Received Item(s)	0	Pending Ite	m(s) 1

If the item received is the last item to be received from that order – 'Order Closed' pop-up box will appear.



2.3.2 Accessioning of Item(s)

Different libraries follow different procedures to accession their documents. Some libraries just allocate continuous number to any type of material received (e.g. printed books, cassettes, CDs, computer files, e-books etc). Some categorise the documents like textual documents and digital material (CDs, etc) and follow different series for each of them. Some of them prefix / suffix the Accession No. with alphanumeric code to identify department, collection (Lending/Reference) etc. Before you assign accession number to any of the titles, get your self acquainted with the system followed in your library.

Though it is not possible to assign duplicate accession number to any title, as its uniqueness is maintained by the system, precaution needs to be taken to ensure that numbers are not skipped in sequence or wrong prefix/suffix are added while assigning the accession number to any title. There is a facility to auto-assign the number – use it to avoid errors.

The titles, which were updated by using 'Receive Order', will automatically appear in the following screen shot provided. You will be able to search the titles received by choosing any of the following filter criteria:

- 1] Regular Items / Gratis Items
- 2] Title
- 3] Supplier
- 4] Date of Receipt
- 5] Order No.

		Acce	essioning F	100033						
		Regular Item(s) O G	ratis Item(s)	Last Acce	ssion	[FL65	6		
Filt	er By									
01	Title		0	Supplier	Allied Pu	blisher Pv	t.L.td.	~		
0	Receive Da	nte 21/05/2010 Y To 21/0	5/2010 👻 💿	Order	ord/inf/09	90		~	Search	
	sel ID	Title	Author	Publisher	Edition	Price	ISBN	Acci	No	
	Γ1	Macro economics and the real	Backhouse	Oxford U		49.98		0		_
	F 1	Services and the knowledge ba	Boden Mark	Continuu		25.00		0		
	F 1	Clinical trials by Shapiro	Shapiro	Dekker	Latest	115.00		0		
	F 1	Human biology by Muder S S	SSMuder	McGraw-		24.95		0		



You also have facilities to 'Import MARC' record (either from the clipboard or from the saved file) for any title you are accessioning (As shown in toolbar reproduced below). This will fill-up the blank fields for which you did not have complete information when the order was placed. Please refer to Cataloguing Module for understanding the mechanism to Import MARC records.

Import MARC Find Title Select All Auto Assign Save Merge With Existing Merge and Save Close

Find Title allows you to check whether you already have the title in your collection— if it is there then you will not create additional record for the title on hand – but will assign accession number and 'Merge with Existing' record.

When you click at 'Find Title', a pop-up window appear – feed the title you want to check – if you find the title which matches the title you are about to add/accession, double-click on it – vital fields of that title will appear in the blank box on right of the window of 'Accessioning Process'. You may cross-check the complete details of the highlighted title already on stock by clicking 'Show' button on 'Find Title' window.

Now you assign the accession number either by directly clicking the empty box under 'AccNo' column or use 'AutoAssign' option. Whichever way you assign the accession number – ensure it is absolutely correct – you will not be allowed to assign the same number again. As such mistakes committed here are irrevocable. Now if this title on hand already has a record in our database (Find Title), then instead of creating a new record, you have to choose the option 'Merge with Existing'.

			Acc	ession	ning	Process	i,				
			Regular Item(s)	Gratis Item	(2)	Last Acc	ession FL558			_	
	r By				🛱 Che	eck For Exist	ting Record				
D1	Title					Enter Title	Services				
1	Recei	ve Da	de 21/05/2010 ⊻ To 21/	05/2010	0	Accession No				Search	
		iD	Ne 21/05/2010 Y To 21/	05/2010 Author	0.			AUTHOR	EDITION	Search ISBN	
	sel F	ID 1	Title Matro economics and the real	Author Backhi		Accession No			EDITION		1
	sel F F	ID 1	Тле	Author Backhi		Accession No RECID	TITLE	y Gandhi, P.J.	EDITION		7
	sel F	ID 1	Title Matro economics and the real	Author Backhi	•	Accession No RECID 4349	TITLE Servicesector in the Indian econom	y Gandhi, P.J.	EDITION	ISBN	7

Double-click on the title matching the title on hand in the above window. The details of title will appear in the small window on right.



If you have received multiple copies of single title, in that case you are requested to select all the titles and click on the button 'Merge and Save' this will create a single record with multiple accession numbers.

se	ID	Title	Author	Publisher Editio	on Price ISB	N Acc No	Services marketing by Govind /
Г	1	Macro economics and the real	Backhouse	Oxford U	49.98	0	Author - Apte, Govind
Г	1	Services and the knowledge ba	Boden Mark	Continuu	25.00	0	Edition - / ISBN -
1	1	Clinical trials by Shapiro	Shapiro	Dekker Latest	115.00	0	Record ID:- 14349
Г	1	Human biology by Muder S S	SSMuder	McGraw-	24.95	0	and the second second

For the titles, which are not duplicate and you want to create new record for them, and if you wish to get the accession number automatically assigned from the previous sequence, select 'AutoAsign' accession number, feed appropriate data, if applicable prefix/suffix alphabet(s), and simply 'Save'. New catalogue record will be created with data elements available from the order form details. We will edit these details in cataloguing module using "Title in Process" option.

🔜 Auto Accessioni	ng	
	Auto Assign	
Collection Type	General	~
Last Accession No		
Prefix or Suffix	G	
Consider as	Prefix O Suffix	
Strating Number	1	
Total Length	0	
	OK Close	

Please note that when you save accessioned records you will get a message as "AMARC record is also inserted with necessary tags filled, The record id is XXXX", for each of the title, here XXXX will a system generated unique record number assigned to that record. You can use this record number for further operations in catalogue.



2.3.3 Accessioning Report

This report enables you to view all the titles which has been accessioned, you can get this report by Order, Budget, Accession No as Prefix, Type of Material, Date and Range of Accession Numbers.

2.3.4 Barcode Report

Using this option one can generate barcode for newly accessioned book, one can generate barcodes by same criteria's as mentioned in section 2.3.3, however there is an additional provision for generating reports by Accession Numbers, where one has to enter all the accession numbers separated by comma for which barcode needs to be generate, the value entered as "Header" will appear on top of your barcode label (Please note that barcode labels are defined in Administration Module).

2.4 Payment

The next step in the reference is to process the payments for the items accessioned/received.

'Payment Process' allows you to

- i] Process the invoices for the titles received
- ii] Complete payment process (Cash/Cheque/Accounts Dept)
- iii] Generate 'Credit Note' or 'Refund' amounts for 'Advance Payments'
- iv] Forward the invoices to accounts department (Letter/e-mail)

Following reports can be generated from the 'Payment' Menu :



2.4.1 Invoice Process

To process invoices received against order you have to fill-up the details like:

- Invoice no. & date
- Overall discount % rate (if any)
- K Currency (if different from the placed order)
- K Additional charges like postage, packing, forwarding, etc (if any)
- Discount % rate for individual title (if different from overall discount)
- **k** Budget head to be charged (in Final stage)

You will be having drop-down options available for all the key-fields. You can select the payment type (Regular/Advance). Advance option can be selected for certain titles where supplier/publisher asks for 'Advance' payment (full/part) – normally advance payments are made based on a Performa invoice sent by the supplier.

In normal course, select regular for the titles, which were received against a specific order. Following steps need to be followed in sequence to process the payment.

If you select order no. from the drop-down option, all the titles received against that order will appear in the box. Click at the title(s) for which

	9	Invoice Pr	ocessing				Supplier	Address		
Payment Type	Regular	~	All Orders				Opp.	Pratap Cinema Jubili	ee Garden.	
Supplier		TIMPET I	Date of Order				Gujar	at	39000	1
Order No.	ord/inf/090		Invoice Date	21/05/			Vado	dara - INDIA		
nvoice No			Reference No	-	2010		Email			
select Tr	tle		Ord.ite	Rec.Ite	Paid Ite	Currency		C.Rate Price	Discount	Net Price
	acro economics a uman biology by f	and the real world Muder S S	V0I.1 1 1	1	0 0	United King United State		83.02 49.98 42.46 24.95	0 0	4149.3396 1059.377
				Ca	Iculate To	tal Amount	1			
ther Charges Total Net Am		6 Overall Discou		Misc. C		0.00) Rounded (0.00 T	otal Amount	5208.716



you are making payment (it will get highlighted).

There might be occasions when discount rates are title-specific (e.g. Indian Editions, Asian Textbooks, South-Asia Editions, International Editions. In such cases, overall discount % will not be applicable. Select 'Discount Process' while the title is highlighted (or double click the title). Small pop-up box will appear as shown below. Feed requisite discount % - net amount is calculated automatically. Press 'Save' if all the details are correct.

Ordered	Receive	Paid Copies	Currency	Conversion	Price
1	1	0	United States Dollars	✓ 42.46	24.95
				Discount	0 9
				Net	1059.377

Repeat the process till appropriate data for all titles in that invoice appears. This process automatically keeps on updating information in the corresponding fields.

Click 'Calculate Total Amount' after you complete the 'Discount Process' for all the titles received.

Now second part of the 'Invoice Processing' is as follows:

Some publishers/suppliers offer 'Overall Discount' which is over and above individual discounts. In such cases, feed the percentage. There might be some sundry charges on this invoice like postage/delivery charges etc. – if so feed the information in miscellaneous charges box. You are allowed to 'Round off' the final amount. Check the 'Budget' – this is the final opportunity to make any corrections for charging the invoice amount to specific budget. After checking the accuracy of information Click 'Process Invoice' - 'Invoice Generated' message-box will appear.

2.4.2 Payment Process

Once you process the invoice, depending upon the practice followed in your library, you have to make payments either in cash or by cheque/demand draft/credit card, processed within the library (by library's admin/accounts staff). In large set-ups the processed invoice (duly receipted with accessioning report) is sent to the Main Accounts Department of the College/University for payment.

Select 'Payment Process' and click 'Add Invoice' from the bottom menu-bar of the first screen.

€¦\$ A	dd In	voice For Pay	ment		
			Available	Invoices	
	sel	Invoice NO.	Order No.	Invoice Date	Total Amount
1	\checkmark	inv/inf/090	ord/inf/090	5/21/2010	6958.40
			Add	Close	

The short details of available invoices will appear in the small pop-up box. Tick the box against the invoice – it will get highlighted. Click 'Add' button for selecting the invoice for payment.

Select appropriate option for 'Payment By' from the drop-down box.

If the payment processing is handled internally (i.e. from the Library's Accounts staff) fill-up appropriate payment details – Cheque/DD No., Bank Name, Branch, Bank charges (if applicable) and feed 'Forwarding Remarks' to elaborate payment details and Click 'Process Payment' button.



		Paym	ent Process	5	
ment	Process Paym	ent Settlement			
	Invoice NO.	Order No.	Invoice Date	Total Amoun	
•	inv/inf/090	ord/int/090	5/21/2010	6958.40	
Cheo	que/DD No/Ref. Bank Nar	Chate Death		Date 21/05/2010 🗸	
Chec	que/DD No/Ref.	40		Date 21/05/2010 🛩	
	Bran		iversity		
To	tal Invoice Amo	unt	6958.4		
	Bank Charg	es	0.00		
	Total Amou	ant	6958.4		
Fo	rwarding Rema	rks			ł
	Add Invoic	e Remove	Investore Descent	s Payment Close	7

For payments, which are to be sent to accounts department – select appropriate choice from the drop-down options in 'Payment By' and click 'Process Payment' button.

'Payment Operation Completed' pop-up box will appear. Click 'OK' to complete the process.

2.4.3 Payment Settlement

The invoices which are sent to accounts department for processing the payments will either come back to the library with a cheque for the invoice amount or the accounts will send it directly to the supplier, with intimation to the library. In such cases, complete 'Payment Process' by selecting 'Payment Settlement' option. Feed appropriate information and click 'Save'.

		Payment Pro	ocess	
men	t Process Payment S	Settlement		
	Referance No.	Amount	Date	
•	acq/acc/090	1059.38	21/05/2010	
Ch	Payment By eque/DD No/Ref No Bank Name Branch	Cheque 123456141 State Bank Of India Gujarat University	Settlement Date	21/05/2010 💌
Т	otal Invoice Amount Bank Charges Total Amount	1059.38 0.00 1059.38		
F	Forwarding Remarks			

2.4.4 Refund Process



There are some occasions, when advance payment amounts need to be adjusted in cases where final supply price is less than the 'Advance Payment' amount. In such cases, you have to initiate 'Refund Process'.

Click 'Add Item' on the first screen appearing, a pop-up box will appear with a drop-down option of order nos. Select appropriate Order and feed exact amount paid and 'Save'. The supplier's account will get updated automatically to the effect of exact amount paid.



🗱 Acquisition > Paym	ent >	Refund Proces	s			×
		Refund P	rocess			
Order No. ORD111777	3¦€ R	Refund Process				
on brittini			Ret	fund P	rocess	
		Order 🖸	RD111777			~
		sel Invoice No	D. Orde	r No.	Invoice Date	
	۲	T INV7171	ORD	111777	5/21/2010	
Payment Details						
Payment By Chequ						
Cheque/DD No 12346						
Bank Name State E						
Branch Gujara		_				
Total Amount			ок	Browse	Close	
	Sele	ct Order Number	for Refund.			-
Add Item		riemove kem	0010	01030		

Following reports can be taken out from the payment menu with variety of filters. All of them are self-explanatory



2.4.5 Forwarding Letter to Account Section for Payment

This report/letter will enable you to generate forwarding letter to Account Section for process of payment. One can generate this report by Invoice No/ Date or Supplier.

Forwarding Letter	
Select option Invoice No V Select Invoice No Inv/Int/080	Display
The state of the s	
Forwarding Letter to Account Section	
1	
To,	
Account Section,	
THE MAHARAJA SAYAJIRAO UNIVERSITY OF BARODA	
Station Road	
Sayajigunj	
VADODARA-390002	
hmlmsu@rediffmail.com	
Subject: Forwarding Letter for Books	

2.4.6 Invoice Report

One can generate invoice register supplier wise, Invoice report can be generated between range of dates as well as budget wise. This report will give you status of each invoice.

Paym	ent Register												
	9	eleit	Aphony Date	Betw	ien 🗢 Date	Bet	ween' 19/05/2	010	100	22/05/	2010 🔗	Display	
-	1.1	10	1 Contraction	10.1		÷.	100%						
							Paym	ent	Register				
					B	tpor	t by Date bety	-	9/5/2010 and	22/5/20	210		
SrNo	Payment Date	\$	Invoice No / Date	\$	Order No / Date	:	Payment Type	\$	Cheque No	٠	Amount ‡	Hank, Branch 💈	Hemar
1.	21/05/2010		Imm/mf/080 21/05/2010		ord/int/090 21/05/2010		Cheque		123456141		1059.38	State Bank Of India, Gujarat University	
2	21/05/2010		inv/in5/090 21/05/2010		erd/inf/090 21/05/2010		Accounts		12345625		6958 40	State Bank Of India, Gujarat University	
										Total	8017 78		

2.4.7 Payment Report

This report will give you list of all the payments generated against each order and received invoice, one can generate this report by Supplier, Date and budget as report parameters.

Invoice Registe	r					
Select Option Da	atewise	V Date From	19/05/2010	And 22/05/	2010 💌	Display
i tan a a	of 1		100%		200 I	1
	Rep		Register	2010		
Invoice No 🗧	Order No 🗘	Invoice Date	Supplier \$	Amount \$	Payment ‡	
inv/inf/090	ord/inf/090	5/21/2010	Allied Publisher Pvt.Ltd.	6958.40	Accounts Section	
Inv/Inf/080	ord/inf/090	5/21/2010	Allied Publisher Pvt.Ltd	1059.38	Accounts Section	
Printed On :21					1/1	
Report generated by	r-SOUL 2.0					

2.4.8 Refund Report

This report facilitates user to generate the report of refunded amount between particular dates.



3.0 Catalogue Accusition: Catalogue Disculation Senials David OPAC Administration Help: Check for Updates Melp @ Ouit Cataloguing ImportExport Services Process Detration Cataloguing ImportExport Services Catalogue Preses is

3.1 Cataloguing

Cataloguing is the most important module of the LMS from the point of view of retrieval of information. Retrieval of accurate/correct information depends upon how much care was taken while feeding accurate bibliographic data. Please ensure you follow international standards (like AACR) for field values and selection of keywords, subject-headings etc. SOUL uses MARC21 format to create records for the resources. MARC format will help us exchange information to and from other databases. MARC format supports several data field. Depending upon the size of the library and user-needs, you may choose selected important fields for your database. SOUL allows you to import data in MARC21 format too. This will also help you in saving data-entry effort and maintain accuracy (MARC records can be downloaded from LC (Library of Congress), IndCat (INFLIBNET Centre's Union database) or other OPACs for most of the foreign publications) – the mechanism is discussed later in this section.

The logical step after accessioning is to catalogue the documents received from the suppliers. There are two ways to technically process these resources - one is to Import MARC records from other OPACs available from well-known National Libraries like Library of Congress or IndCat (INFLIBNET). You only will have to check accuracy of the imported data and may have to customise certain field-values to your needs (like key-terms, price, ISBN – which might be of international/ foreign edition, in few cases Class Numbers to suit local users need, etc) before it becomes a part of SOUL database. The second is to manually input all the necessary data elements into appropriate fields of the options available.

You may remember that under Administration Module, you have created necessary data-entry templates needed for your library (you may use readily available MARC template with all the fields or the one customised for your library). Be consistent in using either of them.

To create and use templates, some in-depth knowledge of MARC21 format fields and its values is needed. You are used to simple rules of cataloguing, and choose few crucial bibliographical details (like Author (s), Title, Edition, Publisher, Year, Pagination, ISBN, Subject Terms, Accession No., Collection Code etc). But please remember, to exploit advantages of automation, you can learn importance of all MARC fields and feed necessary information in the designated places.

Only trained staff should be used for cataloguing modules data-entry function. Efficiency of retrieval from the database is directly proportional to the strict adherence to the international standards observed

SOUL has a powerful and versatile search capabilities to search the database – with almost all the permutation, combinations of the fields to be searched with Boolean logic under Advanced Search.

Let us know how to use Pre-defined Data Entry Templates provided by the SOUL. If you are going to use 'Template Based Data Entry', lease ensure you are well versed with all the MARC21 fields and have experience in handling values for all the tags - You may like to refer to some of the examples screen-shots shown under 'Data Operation'. Following topics are covered under this module:

Cataloguing

- Titles in Process
- **Data Operation**

Import/Export

- Import from MARC
- Export to MARC ĸ
- CCF to MARC
- MARCXML to SOUL

INFLIBNET CENTRE AN IUC OF UGC

- - Add Accession No. To Imported Data

User Services

K Current Awareness K Bibliographic Service

Reports

- Basic K
- Spine-Label
- Advanced
- Book-card

3.1.1 Title-in-Process

(Please ensure you are familiar with MARC21 Tags and MARC Templates)



The titles, which have been accessioned earlier, will appear under this option. Click 'Titles-in-process' icon on the top-menu-bar

Accessioning Date Between 21/ Title	05/2005	and 2	21/05/2010 💌
Accession No.			Search
Sel Title	Accession No	Record Id	Accession Date
Microeconomic theory : A math	248338	(null)	5/21/2005
✓ Taxmann's Yearly supreme cou	248182	(null)	5/23/2005
Savarkar samagra : Swatantrav	H10318	(null)	8/6/2005

Select the titles you wish to catalogue – and click 'Edit'. Window with 'Predefined Data Entry Template' will open. Feed missing information accurately, if required correct the details like title/author, edition etc. Feed Location (if different than Main Library – i.e. Branch/Department Library, Collection (Lending, Reference, Special), Feed Classification Number, Book No. Click 'Optional Entry' from the top-left menu bar. Here you will be able to feed all other relevant information about the title

– assign subject keywords relevant to the item and 'Save'. 'Record Saved' pop-up message will appear.

To have more explanation on this operation, please refer 'Predefined Date Entry' using book template under 'Data Operation'.

Important After editing record through "Title in Process" option, Please click "Circulation" button to make the item ready for circulation.

After editing record through "Title in Process" option, Please click "Circulation" button to make the item ready for circulation.

3.1.2 Data Operation

(Please ensure you are familiar with MARC21 tags and templates, it is also being requested to refer annexure for details or follow the guidelines given at http://www.loc.gov/marc)

Select 'Data Operation' option when you wish to feed data using 'Predefined Data Entry', 'Template Based Data Entry' or 'Authority Template Based Data Entry'. This option allows you to feed information in all the defined MARC fields and sub-fields (Tags).

🎋 Catalogue -> Cataloguing Process -> Data Operation									
Predefined Data Entry	O Template Based Data Entry O Authority Template Based Data Entry								
Select	BOOK THESES OK Close								

Here you have options to create new record or edit the existing ones. Following pop-up window is self-explanatory to understand 'Edit Records' option by choosing either Record ID, Range of Records, Accession No., User Name, Dates from to, as well as you will be able to Search the records with various parmeters available from OPAC.



te Statement (245) = \$= Fundamentals in educ addesses J pontributors ersonal Name(100) Con lessonal Name (100700)		State	Fixed Field (006/8 ander of Title \$b ment of Reip \$c Oe			s b000 u erg o on Statemen Edition \$	n (250) Ia	Modify	v -
e Se Fundamentals in educ addresses / entributors enconal Name(100) Con inconal Name (100/700)	ation, art and civics : escays	and Rem State	ment of Resp. \$c	orge Lansing Raymo		Edhon \$	la		
Addresses J patributors ersonal Name(100) Con ersonal Name (100/700)	porate Name(110) Me	State	ment of Resp. \$c	orge Lansing Raymo	nd Rem			_	
ersonal Name(100) Cor Inconal Name (100/700)		eting Name(111)						_	
erconal Name (100/700)		eting Name(111)							
	~ 1			10)					
Personal name \$a	- Lii	M	Added Entry						
	armond. George Lansing		Date	is associated with a n	ame \$d				
Relator term \$e				Fuller form of r	ame \$a				
blisher Information (260)								
me\$b Funk & Wagnals Compa	Place \$	a New York	8 1	anguage motion	U Cla	IST NO. Sa LB	41	8	
ate \$c 1911.	Country Country	Y DIDIP		(020) \$a	8			15	
	1	ALCOLA			U.				
visical Description (300)	Illustration \$b		Dimension Sc		Acc.M	atenal Se		1	
	-		tomension ec	TBRTWoms.	- E ACC. PA	tional ba			
cation (852) C	apy No \$1 1		*						
cn No\$p 1001	Collect To \$b General	· Coded Loca	tion \$1 Main Library	· Department	~	Supplier		*	
Material Textual Docu	Class No \$k LB 41	Local	ion \$a SHML	Budget	0	Invoice No			
Status	Book No Sm R2	Sheking Local	ton Sc ahl	Price Ir	vd. w	Invoice Dt	07/04/2010	4	
lique Reprinted 2				_	-	Date of Acq.		4	
Multi Senes				Attachme	et				
						Select File	Clear		
cord (D) 82536									

Entering Leader and Fixed Field

Leader © 00000ca0 02200000 4500 Moddy Fixed Field (006/5) © 100521e1911 i.a.g. 6000 umg u Moddy

As explained in Administration Module leader and fixed fields are necessary elements for any record in MARC21 format, one can choose leader/fixed fields from predefined template by exploring the combobox and choosing right type of document, If you want to modify leader/fixed fields specifically for the record you are entering please choose modify button and select appropriate values, please note that the changes done will have effect only in current record which you are creating.

Entering Title and Edition Statement



Before entering the title statement fill in the indicators. For title first indicator suggests whether it is an added entry or not, where as second indicator is for non-filing characters, choose appropriate values as per your record. You can enter 'Title', 'Remainder of Title' and 'Statement of Responsibility' as shown in screen above. There is also provision to enter 'Edition' and 'Remainder of Edition Statement'.

Entering Contributors

Contributors are the persons/organisations involved in creation of content. Contributors of content may be Person, Corporate Body (Institutions), Meeting etc.

Please note that, for any document there will be only one main entry which will be saved as 1XX tag. Other contributors related with the document needs to be entered as "Added Entry", if you want to have the contributor as added entry please tick "Added Entry" Check box which will be saved as 7XX tag of MARC Record.

Personal Name



First indicator in 'Personal Name' suggests type of personal name entry element, where as second indicator is usually undefined, choose the appropriate values and enter 'Personal Name' according to the recall value of the name, The filed "Relator Term" generally is for role of contributor, There is also provision to enter 'Date Associated With Name' and "Fuller Form of Name".

Corporate Name

Personal Name(100) Corporate N		Uniform Name(130)		
Corporate Name(110/710) Inverted na	me 🛩 🕘 Analytical entr. 🛩 💈 🔲	Added Entry		
Corporate name \$a INFU	BNET Certre.	Subordinate unit \$b	Unité Name	-
Number of part/section/meeting\$n		Date of meeting or treaty signing \$d	Date	
Location of meeting \$c	Relator term \$e	Misc information \$g		

First indicator in 'Corporate Name' suggests type of corporate name entry element, where as second indicator is undefined, choose the appropriate values. As indicated in screen shot above software have provision for entering 'Corporate Name'. If the document is related to some meeting etc, one can enter 'Number of Part/Section/Meeting' as well as 'Location' in the field provided. There are also provisions to enter 'Subordinate Unit' of corporate, 'Date of Meeting' and other miscellaneous information describing corporate contributor.



Meeting Name

Entering contributor as meeting is same as corporate name, the only difference is, instead of 'Corporate Name' one has to enter 'Meeting Name'.

Uniform Name

	porate Name(110) Meeting Name(111) Uniform Name(130)	
Uniform Title (130/730)	✓ I No information ✓ Added Entry	2
Uniform title \$	de Number of partisection of work \$n	-
Medium \$	Form subheading \$k: Date of a work \$f 21/05/2010	

The first indicator suggests non-filing character where as second indicator is undefined. As displayed in above screen shot, one can enter 'Uniform Title', 'Medium of Document', 'Number of part/section of work', 'Form subheading', and 'Date of a work' pertaining to the document.

Entering Publisher Information

Publisher can be entered as displayed in following screen shot.

Publish	er Information (260)			
Name\$b	Funk & Wagnalls Company ,	Place \$a	New York :	+
Date \$c	1911.	Country	INDIA	~

Software facilitates you to add country, Place and Name of Publisher along with publication date. Please note that after entering few characters publisher list will get populated from vendors database once have created through 'Acquisition Master'

Entering Language, ISBN and Class no

Unique details related to document eg. Language, ISBN and Class No can be entered as shown in screen shot below.

Language	English	🗸 CI.	ass No. \$a LB 41	±
ISBN (020) \$a		Ē		



Please note that the language entered here will be reflected in multiple tags including fixed field of your MARC record.

Entering Physical Description

According to MARC standard, physical attributes of document needs to be entered in tag 3XX. Software gives you provisions for entering Pagination, Illustrations, Dimensions and Accompanying Materials as shown in screen shot above.

Entering Location

According to MARC standard tag 852 is being used for holding information. In SOUL 2.0, this tag has been modified to address local requirements of the library.



As displayed in above screen shot, as you repeat the tag by clicking '+', system generates new copy number itself, along with all possible default values except "Accession No" The first indicator specifies the shelving scheme and the second indicator indicates shelving order. Choose appropriate values according to your requirement.

In "Accession No" field one can enter accession number, please note that the accession number must be unique. Field "Material" indicates physical type of material of the document; values reflected in combo box are the values entered as "Physical Media" in General Masters of Administration Menu. You will also be able to see the status of that accession number, user is not allowed to modify the status as it affects stability of transaction system.

One can also specify collection type of the document using "Collection Tp" filed. Please note that "Material" and "Collection Tp" are also bound with user 'Category Privileges' and play pivotal role in 'Circulation'.



The "Class No" field denotes the shelving class number of the document, along with 'Book No'. The values in "Coded Location" can be either main library or other department libraries. The 'Location' field can be broader location/section within the library. "Shelving Location" represents either shelve number or rack number or combination of both.

Other details like "Department", "Budget", "Price", "Supplier", "Invoice No", "Invoice Date" and "Date of Acquisition" can be entered in respective fields as shown above.

If one wants to restrict issue of specific copy bearing valid accession number that can be done by putting a tick mark against "Issue Restricted" check box.

Entering items with Multi Series

To enter records with multi series information, click the tick mark 'Multi Series' and then Click on the button 'Add Series', you will get data entry fields as shown in the screen shot given below:



Here one can enter "Series Statement"," Volume Designator" and "ISSN Number", Enter requisite fields and click OK button.

Attaching Document with Record

SOUL 2.0 features attachment of an external file with the record. This file can be a pdf, doc, ppt or any other format; the attached document will appear under 'View Attachment' link of searched record under OPAC.

		(POP _
DDC Summaries.pdf	Select File	Clear	

INFLIBNET CENTRE

(AN IUC OF UGC)

To attach any document click on "Select File", you will be prompted with a file browser window, in which one can select the desired file. At click of 'Save' in main data entry screen, the attached file will be uploaded to database.

Optional Fields Entering Other Titles (Varying form of Title)

If your record contains other types of titles apart from main title, one can enter using this option. This field can accommodate Portion of title, Parallel title, Distinctive title, Other title, Cover title, Added title, page title, Caption title, Running title, Spine title etc. You can choose type of title by choosing appropriate value of second indicator, where as first indicator acts as Note/added entry controller.

arying form of title (246)	Note, no add '∞ 0 Portion of M ∞ 0 \$r [Panel tife:				
Display text \$4					
Trie properishort title \$a	Welcome to big Wyoming .	Remainder of title \$b	Rem Title		
Number of partisec of work \$n		Name of partisec of work \$p			

As shown in above screen, one can enter "Display Text", "Title Proper/Short Title", "Reminder of Title", "Number of Specific Work" and "Name of Specific work".

Entering Subject Added Entries

SOUL 2.0 has feature of rendering subject headings according to the various schemes under the number of fields available in 6XX tag of MARC. However, if any library wants to render keywords instead of subject headings according any schemes they can use tag 653 (Uncontrolled Term) as given in following screen shot.



Entering URL for Electronic Item

Using this field one can catalogue electronic resources by providing URL or the resource. The print document having electronic location can also be catalogued as shown in following screen shot.



Please note that while entering URL in this field, enter fully qualified URL specifying the protocol (i.e. http://, https://, ftp: etc) which will enable user to directly access that resource by clicking in OPAC.

Entering Various Notes



Any information which needs to be provided to the users may be rendered under any of these tags.

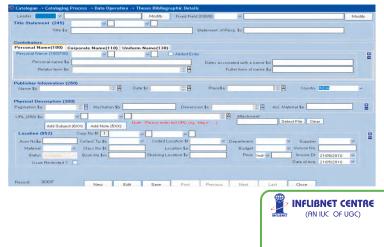
Editing Records

For editing catalogue records one can have multiple choices. User can edit records by Record ID, Range of Records, A particular accession number, By User Name, Range of Date Entered as well as by searching through OPAC by clicking 'Search' radio button. Please choose appropriate option to edit the record.

O Recon	dit			
Range	of Records			
		To 100		
O Access	tion No.			
O User N	lame		_	
0.00				
O Date	21/05/2010	To To	21/05/2010	
			2170372010	
O Search				

Pre Defined Data Entry (Theses)

SOUL 2.0 facilitates user to enter theses in specifically designed data entry screen as shown below:



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Most of the fields are same as explained earlier, One can use Personal Name field (100) for entering the name of the researcher and personal name field 700 may be used for 'Guide' of theses, where as role of the persons (e.g. Guide/Research) may be rendered in corresponding "Relator Term" subfield.

Name of the Research Granting Institute will be rendered in "Corporate Name field" (710).

Abstract and type of degree should appear in corresponding fields of Note Section, which can be rendered by clicking "Add Note (5XX)" button.

Template Based Data Entry

Template based data entry enables you to enter bibliographic data as per template created by user. Please make sure that you have created data entry template as per your choice using Administration Module.

To enter data in user created template, please choose "Data Operation", Click on 'Template Based Data Entry' option and choose the template which you have created. Please note that SOUL software has the default pre-defined templates for entering books, serials and theses.



After clicking OK button you will get data entry screen as defined in your template.



Authority Template Based Data Entry

There is similar procedure to create data base for authority file as explained above, Authority database created here will get reflected in pre-defined data entry sheet.

ider Book	v nam a22 4a 4500 Modity	Fixed Field (006/8) Books v nescalaln Lass c Mod
0	ountry India	Attachment
Len	guage English 🛩	Select File Clear
Iemational Stand	aid Book Number (R (020)	
	a International Standard Book Number (NR)	
an Entry Person	al Name (NR)(100)	
4	a Personal name (NR)	Edit Records
te Statement INR	02450	
~	a Title (NR)	Record ID
¥.	1	
Alexies Distric	Alon. Etc. (Imprint) (NRI(260)	Renge of Records
M	a Place of publication, distribution, etc. (R)	To
	b Name of publisher, distributor, etc. (R)	O Accession No.
	c Date of publication, distribution, etc. (R)	
		O User Name
		C Oter Hearing
		O Date
		From 21/05/2010 🛩 To 21/05/2010 🛩
		© Search
ocation (852)	Copy No \$t 1 No information ~ No inf	
con No\$p 001	Collect Tp \$b Reference ~ Coded	Lo OK Close plier 2000 discovery w
Material Text	tual Docu 👻 Class No \$k 32	Lo No.
Status	Book No \$m Shehing	Location \$c Price Indi v Invoice Dt. 21/05/2010 V
	tricted ?	Date of Acg. 21/05/2010
and the Pres		

Following are typical examples of the various data-elements, which need to be put against the respective tags (fields & sub-fields) in the MARC record of a title. Please be consistent in using punctuation, capitalization based on International Standard Cataloguing Rules (like AACR). Please also refer to MARC21 Standards in the Appendix of the User-Guide.

In Nutshell, To Add, select 'New' from the Menu. Fill up appropriate details and 'Save'. Remember to note down 'Record ID' for future use.

To Modify, select 'Edit' and fill-up appropriate details like Record ID, Range of Records, Accession No., Username, Date range or search specific title to edit, in the pop-up window and 'Save' to effect the changes or 'Close' to ignore the changes.

To Delete, select 'Edit', find requisite record through pop-up window



and click 'Delete' - SOUL will ask you to confirm deletion. Only user with superuser privileges can perform this operation.

3.2 Import/Export

Import/Export module allows you to

- Import from MARC (data downloaded from various sites/files obtained from the publishers)
- 2. Export SOUL records to MARC
- Convert CCF (Common Communication Format) records into MARC format
- 4. Import MARCXML data into SOUL
- 5. Add Accession Numbers to Imported Data

Before you select 'Import from MARC' option – please ensure downloaded MARC records are available on your machine (with appropriate directory path and the file name).

3.2.1 Import from MARC

User can import MARC records for bibliography as well as authority files. Any standard MARC file containing valid records can be imported to your database.

Location Shelf Number, Floor, Wing etc in the Main Library or the location other than Main Library in the sub-fields allocated to each

rocessing Records : O Imports	Biblographic Record		ort Authority Re	cords	
Select MARC File To Import Data Record Under Process Total Records Added				Browse	From Clipboard
	Import Ca	ncel C	lose		

Tag852

MARC records allow you to add local information like Collection Codes (Lending, Reference, Special, and Restricted Access etc), Item



identifier. In normal cases you will NOT use these fields for importing data – as you will feed information locally. Only in the cases where all the elements are relevant to our database, tick the box provided against consider Tag852, else keep it blank.

Select MARC File to Import Data

You can import data either from a stored file (use Browse option to locate the file) or 'From Clipboard'.

Using 'Browse' Option

Select MARC File To Import Data	C:\Dowloadedmarcdata.txt	Browse	From Clipboard
---------------------------------	--------------------------	--------	----------------

Select/feed path for the specific MARC file and click on 'Import' button. Using 'From Clipboard' Option

Select MARC File To Import Data

```
Browse From Clipboard
```

Open the file containing MARC records, select all the records using Edit > Select All option (or CTRL + A), copy all the records using Edit > Copy (Or CTRL + C), so all the records will be copied to your clip board.

👼 marc - Notepad	
File Edit Format View Help	
01371nam a2200301 a 4500001000500000050017000050080041000220350 978-79) ;Dv6th Lok Sabha, 51stD DaCover title.D Da"C.P.U. No. ha.D DaNew Delhi : Lok Sabha Secretariat, 1979.D Dav, 77 p. ;	395."0

Now click on 'From Clipboard' button and then click 'Import'. Records from the specified file will be added to the database mentioning no. of records under process and total records added (Along with Records Identification Number(s)).

3.2.2 Export SOUL records to MARC

This option will export your bibliography to MARC 21 format.

	Consider Tag852 C File C:\Documents and Settings\Desktop\d		
Location of MAR Starting Rec		oc1 Browse	
	ord No 1000		
Record Under F	Process		
Total F	ecords		
	Export Close		
			FLIBNET CEN

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Tick appropriate boxes (if applicable), define the path and filename (remember to select .txt extension) and feed range of Record No(s) to be exported. Records will be exported into MARC format in a file mentioned in the path.

SOUL provides another option if you want to export selective records for larger library setups where acquisition is centralized, and after procurement items are distributed to various branch libraries. To do this please tick on "Consider Centralised Library Export Record". On clicking this, the following screen shot will appear:

Consider Centralize Library Export Reco	ord				
Library Location Prof T.K.G library	Date of Acquition from	5/21/2010	🛩 to	5/21/2010	¥

Now, if you want to export only those records that are located in main library (Or any other library: As per "Coded Location" Field of that record) and those records were created between specific dates, enter those parameters to export selected records.

3.2.3 CCF to MARC (SOUL 2.0)

You can also import CCF records into MARC format. Process is similar to Import from MARC. To perform this operation click on 'CCF to MARC' from main menu, you will get following screen.

🗱 Catalogue -> Data Import/Export -> CCF to	MARC		
	Consider	Tag852 (Local Field	5)
Select ISO File to Import Data	and\Desktop\	ICCF.6d	Browse
Processing Record			
Total No. of Records Added in Database			
Import	Cancel	Close	
	Cancel	Close	

Select the ISO file from which records have to be converted into MARC format and click on 'Import' button to import CCF records to SOUL database.



3.2.4 MARCXML to SOUL

Process is the same as Import from MARC as mentioned before. Select the MARCXML file from which records have to be converted into MARC format and brought into SOUL Database. You will have a choice wether you want to import

3.2.5 Add Accession Number to the Imported Record

SOUL allows you to assign Accession Numbers and also other 'Tag852' information to all the records added to the database to save time on editing individual records – please note that the status of all these records by default remains 'Available'.

	Search by Title economics	Searth
ECORD ID	HILE	AUTHOR
764	Welfare economics /	Dutta, Bhaskar
36	Guide to economic indicators making sense of economics /	A
718	International economics /	Mannut, H G .
663	Takinarins principles of economics /	Dhatani, Prem J ,
048	Principles of microeconomics /	Ahiga HL.
959	Elementary economics (economic theory) /	Sundheram, K.P.M
0963	Monetary economics - institutions theory and policy /	Gupta, Suraj B
2673	Economics of protected areas and its effect on biodiversity /	Kushwah, Ram Be Singh / Kumar, Vijay
3011	American Economic Journal : Microeconomics	Nastville
3012	American Economic Journal : Applied Economics	Nachveller
0013	American Economic Journal Macroeconomics	Nashville
33123	Economics Letters	Owford Munichai
3210	Indian Journal of Agricultural Economics Indian Journal of Economics	Mundar
03283	Indian Journal of Economics ICFAI Journal of Applied Economics	Afahabad Huderabad
3284	ICFAI Journal of Managerial Economics	Hyderabad
3285	ICFAI Journal of Monetary Economics	Hjderabad
0205	ICFAI Journal of Environmental Economics	Hyderabad
13290	ICFAI Journal of Financial Economics	Hiderabad
1291	ICEAL Journal of Industrial Economics	Madaub ed
Status	12663 Collect Tp \$b General Y Coded Location \$t Textual Docu Y Class No \$a Location \$a	Main Libray: Y Department Y Supplier Y Budget Y Invoice No

Search titles by giving 'keyword(s)' or complete title – highlight the title - feed relevant Tag852 details as explained earlier and click on 'Save'.

3.3 User Services

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3.3.1 Current Awareness / Bibliographic Service



In principle, 'Current Awareness Service' and 'Bibliographic Service' are the same – while CAS is generated periodically, Bibliographic Service is created 'On Demand'.

Select appropriate options and provide filters if needed and generate the report. You will be able to save the report (in .pdf format/Excel), print it– and also send it by email to the users.

3.4 Reports



You may recall that, Report Definitions of these reports are set in Administration->Catalogue Master->Report Templates.

3.4.1 Basic Report

This Report is with limited number of fields with standard filters as follows:

By Class Number	By Subject Heading
By Titles	Recent Titles
By Collection Type	By Department
By Language	By Location
By Shelving Location	By Accession Number
By Accession Number	(Range)
By Record ID	By User name
🕅 Catalogue → Reports → Basic → View Report	8
Salect Report By Trie	Data Pices 21/05/2010 × To 21/05/2010 × 🖂 Consider Date
Enter Title India	Type of Material Textual Documents

You are requested to enter appropriate parameters and filters, as well as select the desired template and click on search button to get the report.

3.4.2 Advance Report

Allows you to use boolean operators by selecting requisite MARC fields, and the sub-fields too. There are good numbers of filters to limit your search based on user needs:



Select Tag	Select Subheld		Ouer	Select Operator				
100 Main Entry - Persone	a Personal name (Ni	Ghan	đų	AND	N	Select Report Template		
245 Title Statement (NR)	A Title (NR)	w Inda			N.	Title	v	Search

3.4.3 Spine Labels / Barcode

The report design definitions of all the above can be checked/edited. Report templates with required specifications (size of the labels, margins) are available at System Settings > Label Settings under Administration Option. Ensure that they match the required Print-page size, columns, etc.

Select the report criteria from the following options :

By Class NumberBy Subject HeadingBy TitlesBy Collection TypeBy LanguageBy LocationBy Shelving LocationBy Accession Numbers (Values)By Accession Number (Prefix)By Accession Number (Range)By Record ID

3.4.4 Book Card

The report design definitions of all the above can be checked/edited. Report templates with required specifications (size of the labels, margins) are available at System Settings > Label Settings under Administration Option. Ensure that they match the required Printpage size, columns, etc.

Report can be generated by the following parameters:

```
By Class NumberBy Subject HeadingBy TitlesBy Collection TypeBy LanguageBy LocationBy Shelving LocationBy Accession Numbers (Values)By Accession Number (Prefix)By Accession Number (Range)By Record ID
```

Select the search criteria, title-mark the fields which you wish to display on the report and then click "Search". User will be able to save, print and send email of generated report.



One can enter comma separated values of accession number while generating report by "Accession Numbers(Values)". The sequence in ticking the boxes decides the placement of the field in the report. User can generate the book-cards with different page size and margins.

Select the appropriate one and generate labels. Tick-mark the fields you wish to accommodate on each label or a barcode sticker and click 'Search".

```
Select Fields to Display on Report

        Accession No
        Class No
        Call No
        Collection Type
        Accession No (Barcode)
        Book No
        Draw Line
```

You will be able to save, print and send email of the generated report. One can enter comma separated values of accession number while generating report by "Accession Numbers (Values)".

A very useful facility is provided here by SOUL. All the reports under this option have common information but applications or the page-sizes are different. The sequence in ticking the boxes decides the placement of the field in the report, e.g. in the Spine Label if we want to print labels in following format:

REF	(Collection Code)
823.91	(Class-no.)
CHR	(Book No. i.e. Author Mark)
00010G	(Accession No.

Then tick the boxes in the following sequence, i.e.

Collection Type	followed by
Class No.	followed by
Book No.(Author Mark)	followed by
Accession No.	followed by

This will generate the Report as shown below;





4.0 Circulation



The Circulation Module allows us to create/edit/delete/search User records, renew membership and also establish relationship between the user and resources-by creating transaction Records (Issue/Return/Renew), Reserve the Item(s), issue the items on ILL and get number of routine reports and some management reports.

4.1 Membership

This module deals with all operation related to library members, i.e. creation, deletion and modification of members

4.1.1 New Member

Select Add to create new membership record the drop down will be appearing for selecting Category, Institute, Departments and Course/Designation which has been created earlier under Administration Module of Circulation. Select appropriately and proceed.

Academic Information Category	Inst	itute		Department			Course/Desig	gnation
	Sml							
Add Institute								
Personal information	Contact Informati	ion Picture Gu	araptor lofor	mation(Optional				
	Patel	ion prictare pai			Status Ac	tin can	1271	
	Yatrik				ender Ma			
	11/14/1973	Year of Join	ing 2010	Member		nearal		The Part
	1171471373							
	189935100001			Meml	berID yat	001		
Payment information	Others	Beceint N						
Payment information Deposit Amoun	Others	Receipt N		Receip	t Date 2	/18/2009		
Payment information Deposit Amoun Membership Amoun	Others t [1500.00 0.00	Receipt N. Receipt N.	0	Receip Receip	t Date 2 t Date 11		1	
Payment information Deposit Amoun	Others t [1500.00 0.00	Receipt No	0	Receip Receip	t Date 2 t Date 11	/18/2009 /14/2008	1	
Payment information Deposit Amoun Membership Amoun	Others t [1500.00 0.00	Receipt No	0	Receip Receip	t Date 2 t Date 11	/18/2009 /14/2008	1	
Payment information Deposit Amoun Membership Amoun Maximum Due Amoun	Others t [1500.00 0.00	Receipt No	0	Receip Receip	t Date 2 t Date 11	/18/2009 /14/2008 / 8/2048	1	

After filling in academic information, proceed towards personal information tab, where you can feed personal details of user, e.g. name, date of birth etc. If a member status is selected as active, then only member will be allowed to do any transaction. You may also choose member type, as it is gets reflected in book bank issues for member. All transaction can be done using 'Member ID' which should be unique. The ID can be unique roll number, GR number or employee ID.

After feeding in personal details, feed in contact information, where you can place address details of member.



If you want to put member's photograph, then click on picture tab and upload member's photograph which you should have already scanned. To enter guarantor information please choose guarantor tab, If the guarantor is already member of your library then after entering guarantor's member id, all relevant information about the guarantor will be retrieved. Please note that picture and guarantor information are optional.

After feeding in the contact details, you are also requested to enter payment information as displayed in previous screen shot. Please note that if you have specified category end date in category master, it will be reflected here.

After feeding in entire details of member, press 'Save'. System generated new membership code will appear in the pop-up box, with a prompt to confirm it. 'New Member has been Inserted' message will appear on the confirmation.

You can search the records through various filters like Code, Name, Department, Designation, Entry date, Category etc.



0	de	1899		_		Se	arch	
Hen	ber Details							
	Select	Member	Code Me	mberName	Institute Name	Department Name	category Descripti	Branch Description
	Г	1899350	50001 PR	ATIK PANDYA	Smt. Hansa Mehta	Univeristy Library/	Lib. Technical Sta	Technical Staff
	Г	1899350	50002 HIT	ESH CHAUHA	Smt. Hansa Mehta	Univeristy Library/	Lib. Technical Sta	Technical Staff
	Г	1899350	50003 JES	SAL PATEL	Smt. Hansa Mehta	Univeristy Library/	Lib. Technical Sta	Technical Staff
	F	1899350	50004 VIN	ODCHANDRA	Smt. Hansa Mehta	University Library/	Lib. Technical Sta	Technical Staff
	Г	1899350	50005 PR	AKASH SHAH	Smt. Hansa Mehta	Univeristy Library/	Lib. Technical Sta	Technical Staff
	Г	1899350	50006 CH	ANDRAKANT	Smt, Hansa Mehta	Univeristy Library/	Lib. Technical Sta	Technical Staff
		1899350	50007 JAJ	WIKA CHUDG	Smt. Hansa Mehta	Univeristy Library/	Lib. Technical Sta	Technical Staff
	Г	1899350	50008 NIL	ESH JOSHI	Smt. Hansa Mehta	Univeristy Library/	Lib. Technical Sta	Technical Staff
	E	1899350	50009 MO	INA PARMAR	Smt. Hansa Mehta	Univeristy Library/	Lib. Technical Sta	Technical Staff
	L .	1899350	50010 JOS	SEPH CELINE	Smt. Hansa Mehta	Univeristy Library/	Lib. Technical Sta	Technical Staff
	Г	1899350	50011 CH	ARULATA AMI	Smt. Hansa Mehta	Univeristy Library/	Lib. Technical Sta	Technical Staff
	Г	1899350	70001 YO	GENDRAKUM	Smt. Hansa Mehta	Univeristy Library/	Lib. Technical Sta	Technical Staff
	- F	1899351	00001 Yal	rik Patel	Smt. Hansa Mehta	Univeristy Library/	Lib. Technical Sta	Technical Staff

To update any member's detail select the member and click on 'Show Member' to edit.

4.1.2 Copy Member

You may copy an existing membership record and same it with new membership code. This option is useful when a library member is changing credentials by either shifting to another department or joining a new course.

To perform this operation, select Copy Member. Feed Member ID/Code. Details will appear – Select 'Update' – correct information, data, valid till date etc appropriately – and click 'Save'. Pop-up box with new membership code will appear. Select 'Yes' to confirm.

🗱 Copy Member				
	Enter Member Code 1899351	00001	Copy Member	
Member details				
Member Name	Yatrik Patel		189935100001	
Department	University Library/Faculty Library	Current Due	0	The Second
Category	Lib. Technical Staff			

After doing this you will be able to change his academic details, and rest of the process is same as in case of creating new member.

4.1.3 Search Member

You can search the Membership Records by choosing the option 'Search'. There are various filters to limit the search-results.

These filters are Code, Name, Department, Designation, Entry date, Category.



lember Search Category	Lib Technical S	taff	2			
Code				Se	arch	
Name						
Department Designation	Member Code	MemberName	Institute Name	Department Name	category Descripti	Branch Description
Ealegory	188735070001	DILIP GANDHI	Faculty of Social	Social Work	Lib Technical Sta	Technical Staff
By Entry Date	189935050001	PBATIK PANDYA	Smt. Hansa Mehta	Univeristy Library/	Lib. Technical Sta	Technical Staff
F	189935050002	HITESH CHALIHA	Smt Hansa Mebta	University Library/	Lib Technical Sta	Technical Staff
- F	189935050003	JESAL PATEL	Smt. Hansa Mehta	Univeristy Library/	Lib. Technical Sta	Technical Staff
	189935050004	VINODCHANDRA	Smt. Hansa Mehta	University Library/	Lib. Technical Sta	Technical Staff
F	189935050005	PRAKASH SHAH	Smt. Hansa Mehta	University Library/	Lib Technical Sta	Technical Staff
E.	189935050006	CHANDRAKANT	Smt. Hansa Mehta	University Library/	Lib Technical Sta	Technical Staff
F	189935050007	JANVIKA CHUDG	Smt. Hansa Mehta	University Library/	Lb. Technical Sta	Technical Staff
-	189935050008	NILESH JOSHI	Smt. Hansa Mehta	Univeristy Library/	Lib Technical Sta	Technical Staff
E I	189935050009	MONA PARMAR	Smt, Hansa Mehta	University Library/	Lib. Technical Sta	Technical Staff
E.	189935050010	JOSEPH CELINE	Smt. Hansa Mehta	University Library/	Lib. Technical Sta	Technical Staff
F	189935050011	CHARULATA AMI	Smt. Hansa Mehta	University Library/	Lib. Technical Sta	Technical Staff
	189935070001	YOGENDRAKUM	Smt. Hansa Mehta	Univeristy Library/	Lib. Technical Sta	Technical Staff
F	189935100001	Yatrik Patel	Smt. Hansa Mehta	University Library/	Lib. Technical Sta	Technical Staff
F	189936720001	JAYPBAKASH CH	Smt Hansa Mebta	Univeristy Library/	Lib. Technical Sta	Technical Staff

Once the member list is retrieved according to your search criteria, one can update the member by selecting the member and pressing 'Show Member' button, or directly issue 'No-Due Certificate' by pressing "No Due Certi" button.

4.1.4 Delete Member

There are two options for deleting membership record, you can either delete single member or delete entire group of members as mentioned below:

Single Member Deletion

Member ID 1899351	00001	
Member Details Member Name Yatrik Department Unive Category Lib. T MemberCode 18993 OverDue 0 Card Expiry Date 4/8/2	risty Library/Faculty Library echnical Staff 5100001	

Select the option, feed Membership ID or Member Code and press <Enter>. Membership details will appear in the box – after cross-checking, you can delete the record.



Group Membership Deletion

To delete entire group of member, click option "Group". A window will appear as shown below, in this screen you need to enter Institute details, Department, Category, Course Designation and Entry Date Range after filling all information click on 'GO' button, list of members pertaining to chosen group will appear. To delete them select the member and press "Delete Group" button.

🗱 Group Memb	er Deletion						X
		Institute	Smt. Hansa Mehta Lit	xary 🗸			
		Department	Univeristy Library/Fac				
		Category	Lib. Technical Staff	~			
	Coursel	Designation	Technical Staff	~			
	Memb	er Entry Date	1/ 1/2009 V to	5/31/2010 🛩			
		Go					
Select M	ember CD	Markeller			City C	the Card English	
100000000000000000000000000000000000000	ember CD 19935100001	MemberNam Yatrik Patel	ie .			ate Card Expairy	
*							
1.							
	Select All	Delete Grou	No Due Certi.	Suspend N	lember	Exit	

Please note that using this option, you can issue No-Due Certificate or, suspend member temporarily by clicking appropriate button.

4.1.5 Renewal

Same as deletion, membership renewal can be done using two alternatives, single member and group options.

If you wish to Renew a single membership – feed Membership ID in the box provided and press <Enter> - Membership details will appear with 'Renewal' button at the bottom menu bar. Input renewal date, and click 'Renewal' button the Membership for further stipulated period. To renew Group of Members, filter criteria are same as "Group Deletion".

Institute	Smt. Hansa Mehta Library 🔽		
Department	Univeristy Library/Faculty Library 🔽		
Category	Lib. Technical Staff	Valid upto	5/21/2010 💌
ourse/Designation	Technical Staff 🗸		
_	1/ 1/2005 v to 6/ 1/201C v		
tember Entry Date			
Select Member CD	ao MemberName	Effective Date	
	ao MemberName		Card Expairy 4/8/2048 12:0
Select Member CD	ao MemberName		
Select Member CD	ao MemberName		

Filter out group of members and enter renewal date as "Valid upto", select the members you want to renew and click on "Renewal Group" button.

4.1.6 No dues Certificate

You can issue no- dues certificate to Members in bulk. You have to select institute and then after select department of selected institute and select corresponding category and course/designation within department. Select range of member's entry date. Click on 'Go' button after specifying the member group. You will get listing of members. You can select member and generate no dues Certificate.

4.1.7 Member Card

In this option, user can get the member card as per customized member card template in Administration Module>Circulation Master > Customise Member Card. One can get the report with different parameters life member ID, Member code and Member Entry date. Choose the template and click "show Report". If user want to have border on library card, then tick "Border" checkbox.

4.1.8 Member Listing

In this report, you can get information of member. You can get member details using various filters like course/designation, institute,



department, category, membership starting date, membership end date, member name, member code, member entry date etc.

Please note that, if you select entry date between option, you can get all members who were enrolled as member during the selected period. After selecting of option, click on 'Display' button for display the report.

4.2 Circulation Transaction



4.2.1 Transaction Menu

This module enables you to do all the transactions as displayed below:



Please do remember following short-cut keys for ease of operation:

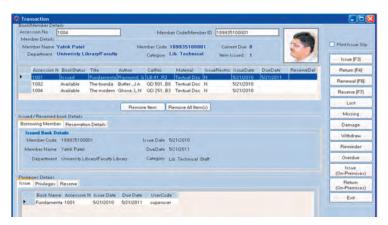
Issue	F3
Return	F4
Renew	F6
Reserve	F7



Issuing Items [F3]

Click 'Issue' button or press 'F3' function key. Cursor will start blinking inside the Member Code/Member ID box. Scan the bar-coded membership card or feed the member ID/ code manually and press <Enter>. Membership details will appear on the screen.

After filling in membership details the curser will blink in Accession No. box – scan the barcode of the document (or feed the number manually) and press <Enter>. Important details of the title will appear in the box below. Click **'Issue'** the document shown on the screen will get issued. If you have ticked the box against **'Print Issue Slip'** (appearing at upper top side of the screen) command will be sent to the default printer automatically. Items lent will change their status to **'Issued'**.



Please note that documents can only be issued when

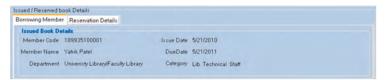
- I. If the membership is valid
- II. No Overdue documents
- III. Number Of items already issued are less than the maximum borrowing capacity
- IV. Member status is active (not Suspended or Cancelled or Defaulter).
- V. No-dues certificate should not be issued.



If there are more number of items to be issued then member privileges then you will be prompted to remove one or more items, individual items can be removed by pressing "Remove Item" button, if you want to clear entire list then press "Remove all items button".

If you have chosen items with more than one status i.e. Available, Issued, Reserved etc. In that case, only 'Available' books will be issued to member.

In case if you want to see status of issued item (i.e. to whom it has been issued etc.) the borrowing member tab will display the borrower details.



Similarly, if the book is reserved one can see the details by clicking 'Reservation Details' tab.

If one wants to see member's details, the 'Privilege Details' tab on bottom will display all the book issued to that member, his privilege details and all the books reserved by that member if any.

sue	Privileges F	Reserve					
	Book Name	Accession N	Issue Date	Due Date	UserCode		
*	Fundamenta	1001	5/21/2010	5/21/2011	superuser		

Return Items [F4]

Same window is used to get the items returned. First scan or feed all the items which needs to be return. On scanning or feeding Accession No., brief details of the title will appear in the box below – after confirmation click 'Return' or press <Enter>. The items will be returned.

If the book is being returned after due date, you will be prompted for taking over due charges. If you click yes on that message a new window as reproduced below will appear:



Slip No.	1100001	Slip	Date	7/21/2011	~
ember Code	189935100001	Accession	No.	1001	
Name	Yatrik Patel				
Issue Date	9/21/2010	Due	Date		
Fine Reason	OVERDUE	Fine Am	ount	20.00	
			_		
	Paynow	PayLater	Ci	ancel	

After confirming the fine amount and pressing 'Save' button, you will have two options, you can either print the fine slip, in case if the fine is to be paid some where else press 'Pay Later' button, if the fine is to be paid at circulation counter itself press 'Pay Now' button, screen reproduced below will appear:

Reciept_No	1100001	Reciept Date	7/21/2011 💌
Slip NO.	1100001	Slip Date	7/21/2011
Member Code	189935100001	Accession NO.	1001
Name	Yatrik Patel		
Issue Date	9/21/2010	Return	5/21/2011
Fine Reason	OVERDUE	Fine Amount	20
Cheque/Draft	00	Reciept Amount	20.00
Bank Name			

This will enable to you collect the fine and print the receipt. Please note that you can collect amount equal to or less than fine amount, and rest of the fine can be settled later using "Over Due" transaction. After pressing save button you will be able to print the receipt.

Renew Items [F6]

This is a comprehensive option. Any member is normally allowed to renew the items at least once, if the borrowed titles are not reserved/claimed by the other members. Scan/Feed accession no. of



the title to be renewed, press <Enter>. Data of the user/member will automatically appear along. Click 'Renew' to renew the item for a further stipulated period (which will be calculated automatically depending upon category of a member).

Reserve Items [F7]

To reserve an item which has been issued to any other borrower, click reserve button. Item will be reserved only if all the copies are issued and the member is allowed to reserve book as per his/her privileges.

Borro	wing Member	Reservation Details					
	SRNo	MemberCode	MemberName	Department	Status	ReserveDate	HoldDate
•	1	189935100001	Yatrik Patel	University Library	Reserved	5/21/2010	6/5/2010
			Movello	Move Down Cance	Reservation		

If the item has been reserved by multiple member; one can change the reservation priority by pressing 'Move Up' or 'Move Down' button, or cancel reservation by pressing "Cancel Reservation" button.

Besides Issue, Return, Renew and Reservation transaction, one can perform the following in-house maintenance transactions like:

Lost Damage Missing Withdraw

Select the item and press corresponding button to change the status of that item. Further process of above maintenance transactions can be carried out in "Maintenance menu".

Reminders/Recall

If you want to generate recall/reminder notice for any issued item, select the item and press on 'Reminder' button, a letter will be generated which can be printed or e-mailed to the borrower of item(The text of reminder letter can be changed using Administration > System Settings > Letter Layout).



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Over Due

Overdue charges for any of the members are dealt here. To clear the overdue account, issue receipt, print statement etc can be handled with the help of this menu.

		Me	mber Code	89935100001		Search]		
		Mei	mber Code 1	89935100001					
		Men	nber Name	'atrik Patel					
Ove	r Due Details								
	SlipNo	SlipDate	LastRecieptN	LastRecieptD	Reason	AccessionNO	DueAmount	FineAmount	
•	1100001	7/21/2011	1100001	7/21/2011	OVERDUE	1001	10.0000	20.0000	
	Reciept No	1000001		Total D	ue Amount		10.00	000	
	Receipt Date	5/21/20	10 🕒	Rece	ipt Amount		10.00	000	
				Print	Payment	Exit			

To collect overdue charges from the member enter the member code/ID of the member, and press search button, you will be displayed all the amount charged against that member, to pay that amount enter receipt amount and press payment button. After doing so you will also be able to print payment receipt.

Issue (On Premises)

On premises issue is a special transaction to provide facility to issue items within library premises or for reading room purpose, photo copying or overnight issue.

To perform this operation, select item and enter member ID/code and press 'Issue (On Premises)' button you will be prompted with following screen.





If you choose 'Over Night Issue' option, only due date will be displayed, in case of 'On Premises Issue', you will be prompted to enter time to return the item. Choose your desired option and click on 'Save' button. The selected item will be issued.

Return (On Premises)

To return any item which has been issued either 'on premises' or 'overnight' just enter accession number and press return button, the item will be returned, if the item is overdue you will be prompted with fine calculation window.

No Dues Reverse Process

There might be occasions when books will be return to the library after issue for various reasons. 'No Dues Certificate'. You can revoke 'No Dues Certificate' by searching the member, ticking the box against the record – in such cases click 'No Dues Certificate' button and "" message will appear. Click 'Yes' to reverse the status. Member will be able to start using the resources as usual (Only new membership code will be generated – old member ID can remain unchanged).

4.2.2 Search by Title

This option is useful when one want to find out contact details of borrowing member or institution of a specific title.

		Issued Ite	em(s)	~ [in	dia		Search		
Item	Details Accession N	Book Title	Member Cod	Forename	Surname	Department	Branch	Issue Date	Due Dat ^
	110539		21012405000			Archaeology		11/9/2005	11/9/200
	114730 115562 118241 137865	Indian civiliz India : a worl Indian theori	21012405000 21012405000	HEAD - HEAD - HARPREET	SUDAN	Archaeology	Professor Professor Under Gradu	10/26/2005 11/14/2005	10/26/20/ 11/14/20/ 3/17/201/ 4/30/201/
\$									*
			Code 2002	1050001					
			Name HEAD						
		Depa	rtmen	1.100	Designation	Robe			
		lauue	Date Date	:005	Due Date	11/1//2005			
		Ad	Idress Dicara	a not stig					
			City Baots		PIN	350001	1		

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To search for items choose 'Issued Item(s)' or 'Items on ILL' and then enter few words of title and press search button, all the items containing your search term will be displayed, to get borrower details of a specific item, double click on title of item.

4.2.3 Overdue Charges

Overdue charges of any of the members are dealt through this menu; it is same as explained in 'Over Due' in 'Transactions' menu.

4.2.4 Book Bank Issue/ Return

This option will allow you to issue library material in bulk to any category/type of member provided they are entitled to get them. E.g. certain types of members like backward class, there is a provision to issue books up to a certain cost and number, for the whole academic year – such transactions is treated as Book Bank issues. Please ensure that requisite details against that specific type of members are filled up (Administration -> Circulation -> Membership Type). In such cases long-term book-loans are affected using this option.

Book Title	189935100001 Fundmentals in educe		cession No 1001 Book Price 200		Due Date	3 /21/2010 ❤
fax. Money Allow	100,00	Max. Bo	ok Allowed 20			
lember Details						
Member Code	189935100001		Category	Lib. Te	chnical	
Member Name	Yatrik Patel		Member Ty	pe Genear	al	
Department	University Library/Faculty	Library		-	l	
ued Book Details						
	AccessionN IssueD	ate Price	DueDate			

The Book bank screen reproduced above will open and you will be able to issue books. Feed Membership Code of borrower and Accession No. of book(s). Same option is used when the books are returned at the end of Issue period.



4.2.5 Reminder

You will be able to generate reminders using this option. Due-date should be selected from the screen reproduced below.

_							
Select	Accession No.	Member Code	Fest Name	LastName	EmailD	Issue Date	DurDele
 F	163211	009501060060	SHIVANI	TALATI		4/23/2009 12:00:0	5/23/2009 12:00:0
F	up4511nl	009501080275	DEVAL	PANDYA		4/29/2009 12:00:0	5/29/2009 12:00:0
E.	207626nl	009501090008	SAHENA BAHEN	KHATEI		5/13/2009 12:00:0	6/12/2009 12 00 0
10	8SLS971	014440060060	ARPITA	JOSHI		5/21/2009 12:00:0	6/20/2009 12:00:0
F	258505	015315070006	ISHANI	SAHAY		5/2/2009 12:00:00	6/1/2009 12:00:00
T	260140	018752080029	RAIDEEP	SOLANKI		4/24/2009 12:00:0	5/25/2009 12 00.0
Г	260390	018752080029	RAJDEEP	SOLANKI		4/24/2009 12:00:0	5/25/2009 12:00:0
E	236420	072706080012	SUDHIRKUMAR	TANDEL		5/21/2009 12 00.0	6/20/2009 12:00:0
1	257706	189935050001	PRATIK	PANDYA	saipratik.a9@yaho	6/19/2008 12:00.0	6/19/2009 12:00:0
				and the second		a ristra a a s	

After finding out your desired results, select the members which you want to send reminders and click on show button.

4.2.6 Circulation Group

A Group-issue(s) can be exercised with the help of this option. This special options is for libraries, that issues items to a group of members rather than individual member.

New Group Details	Group Details
Select Group Library	Group Name
	Member Code/ID
Member Details MemberCo MemberNa GroupNam GroupCode	MemberOetalt MemberCod MemberNa InstituteNam Department CategoryNa BranchNam MemberSt
189935050 PRATIK PA Library 100000	
189935050 NILESH JO Library 100000 189935100 Yatrik Patel Library 100000	
Add Member Delete Member	Delete Clear Member Save

First of all you need to create group of members. To create a new group, click on 'Add Group' button, enter group name and all the members who are part of that group. By default first member entered will be treated as key member of the group, after entering all the members click on save button.

If you want to add/or delete specific members of the group, choose the group highlight the name of member to be deleted and click on 'delete'. To delete entire group click on 'Delete Group' button.

To perform issue/return transaction for the group, please choose group/issue return tab



Enter accession numbers of all the items you want to issue to a particular group, Select the specific group to which you want to issue the items, and then select the due date. By pressing issue button, similarly to return the items, enter all accession numbers and press return button.

4.2.7 Stock Verification

Stock verification in many libraries is an annual process. Select this option to invoke stock verification process. Considering the large collection available in the libraries, the process has been designed.

	g location		Y					Browse
	Verified by							
Ac	cession No	103		J				
		BookStatus	Title	Author	BookLocation			
		Available Available	Fundamentals		sh1 sh2			
						_		
	Import Acces	tion No. C	Delete item(s)	Remove all iter	_	Import		

In stock verification you can verify stock using shelving location of item(s). There are two way for stock verification in first method enter accession number manually.



In second option you can directly import .csv file which contains accession number of documents whose availability has been verified. This option can be exercised by clicking on 'Imported Accession No.' button, click on 'browse' and select .csv file which you want to verify.

After selecting .csv file click on 'Import' button. You can see the list of item(s) at left side of form click on header where accession number is appearing, when you click on header you will see other list of item(s) at right side of form with title. Click on 'save' button, the imported file will be considered as verified. In case you need to clear existing verified item(s) then just click on 'Clear Stock Verification' button.

Note: for stock verification you must enter shelving location of item(s) in data-entry process. You can generate the verified annual stock of item(s). There are four type of report for verified stock.

Mismatch Accession

In this report you can get list of item(s) which are not available in database (or not entered) e.g. you have procured the item(s) but you forgot data-entry of those item(s) but you found during stock verification.

Mismatch Status

In this report you can get list of all those item(s) for which status is deferred in database.

Mismatch Location

In this report you can get list of all those item(s) which are from different location. Suppose you have verified stock of Location A but original location of item(s) is Location B, so you will generate list of all item(s) which are not belong to Location A.

Available item(s)

In this report you can get list of all those item(s) for which status is available on-shelf but they are not verified during verification.



4.2.8 Member Login

In many libraries, daily visits of the members need to be registered to keep track of daily footfall and members using the system. Once you invoke this option on the terminal near the entrance or on OPAC terminals of the Library, Members are supposed to scan the ID card or enter the ID Number manually and use the system.

券 Member Login					
	Mem	ber Code/ID	189935100001		
Lo	gin	Logout	Report	Exit	

Statistical reports can be generated from this menu option. Reports can be generated either by date, currently logged in members, or by a specific member code.

MemberLog Rep	ort								
		Select Parameter	by Date	_	Y	Show			
		Date between	5/21/2010	×	and	5/21/2010	×		
1	of 1	00131		100%	-	× .		-	
		Mer	nber Log F	teport					
Total:1									
Member code	Member Name		Log-in	Time		Log-o	ut Time		
189935100001	Yatrik Patel		5/21/20	10 2:30:4	IS AM				
Printed On: 21/08	5/2010							1/1	
Report generated by-SO	UL 2.0								

4.2.9 Book Transfer

This option is useful in the cases where large amount of collection is transferred from main library to sub libraries (department) or vice-versa. To perform this operation, first you have to select source library (where your collection originally belongs to) and the destination library (where you want to transfer your books), enter transfer date and enter/scan accession numbers of all the items and press 'Transfer Button'.



Se	lect Source Library		Select Destination Library		Transfer Da	ate	Accession N	ło
Ma	in Library	2	Prof T.K.G Ibrary	2	5/21/2010	M	1008	
	Accession No	BookStatus	Title	Author		Material		
•	1001 1002	Available	Fundamentals in educ The foundamental of c		George Lans		Documents Documents	
	1002	Available	The modern history of				ocuments	
	1008	Available	Theory of the just price	e Kaulla Ru	doll :	Textual I	ocuments	

Please note that exercising this option will change Location field of bibliography of all selected items which has been transferred to other location physically.

4.2.10 Issued item(s) Over Period

One can see history of issued item(s). You can search issued item(s) by three criteria, i.e. Items issued during the specified period, member code, accession no. as well you can search item(s) of particular departmental library. After filling criteria as described above click on 'display' button.

4.2.11 Item(s) Returned Over Period

You can see history of returned item(s) between specified period of return as well as you can search returned item of selected library.

4.2.12 Item(s) Reserved Over Period

You can see current reserved item(s) between specified period, You have to enter period and click on 'Display' button, you can generate reserved item(s) list. You can also get reserved item(s) of particular library.

4.2.13 Overdue Item List

You can generate a list of overdue items by member code, titles, and specified dates. You can also get over due item(s) list of particular library after selecting library.



4.2.14 Fine Payers List

You can see list of all member who paid fine between specified periods. You have to enter range of dates and click on 'Display' button.

4.2.15 Pending Dues

You can generate list of members with pending due You can list member using two parameters i.e. member code and dates. After filling these parameters click on 'Display' button.

4.2.16 Issue On-Premises/Over Night

You can see list of over-night issued item(s) as well as on premises issued item(s) or a combined list of two

4.2.17 Group Issue Report

You can get list of item(s) which are issued to a group. You can list item by three criteria i.e. all group, single group, and for particular member. You can select any one parameter for getting list. After selecting any option click on 'Display' button, you will get list of Issued item(s) to Group.

4.2.18 Stock Verification

One can generate the verified annual stock of item(s). There are four type of report for verified stock.

Mismatch Accession

In this report you can get list of item(s) which are not available in database (or not entered) e.g. you have procured the item(s) but y o u forgot date-entry of those item(s) but you found during stock verification.



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Mismatch Status

In this report you can get list of all those item(s) for which status is deferred in database.

Mismatch Location

In this report you can get list of all those item(s) which are from different location, Suppose you have verified stock of Location A but original location of item(s) is Location B, so you will generate list of all item(s) which are not belong to Location A.

Available Item(s)

In this report you can get list of all those item(s) for which status is available on shelf but they are not verified during verification.

4.2.19 Member Log List

Using this option, you can get report on number of members who visited the library as well as how many members are available in library at a given time. You can get a list of members between a given period and by members that are currently logged in, after selecting the criteria click on 'Show' button to get list of member with their logged in and logged out time.

4.3 ILL (Inter Library Loan)





4.3.1 Borrowing Item(s) on ILL

Steps involved in borrowing item from any external institute are

- Input item Info into 'Request' with ILL Institution details
- Send Request Letter to ILL Institution
- Receive ILL item from the ILL Institution
- K Send arrival intimation to Member.
- Issued item to the Library Member
- K Send Reminder Letter to Member to return ILL Item
- Record returns of the issued item by the member
- Return ILL Item to the ILL Institution
- Generate requisite ILL reports

Entering a New Request

For procurement of any item from external library, usually request is being done by your own library member, to enter that request use click on request, and use following form reproduced below.

Member Code Name Title	Yevil Pale) No exp. d/Trath		Textual Document	7	
1 st Author 2nd Author	M.F.Oliandhi	Publication Year Date of Request	1970 5729/5000		
Publisher Library Name	99Mt forew				
	Co Media Descr Bo	ok Title Author1 exp. of T M.K. Ghandh	Author2 Publi	sher	

After entering brief bibliographical details of item to be bought, choose external library to which ILL request needs to be sent. Please note that the lists of external libraries are those libraries which you have entered as institutional libraries which you have entered in Administration module.



Send Request Letter to Library

After inputting request for item(s) repaired on ILL, you need to send request letter to external library to supply item under ILL. To do this, click on 'Request to Library' tab, select the library to which you want to send request and click on 'Show' button, a request letter will be displayed as shown below containing all requested items.

Ø Reports	
1 d 1 d 2 d 2 d 2 d 2 d 2 d 2 d 2 d 2 d	
Information And Library Network Centre (An IUC Of UGC) Ahmedabad	
Inter Library Loan request	
τσ.	
Code ILSSM1001	
SSMT library	
MS university campus	
Baroda -	
Phone No.	
Email: samt@yahoo.com	
subject : Inter Library Loan request	

Receive ILL Item

After sending the ILL request, the external library may send you the requested item, to receive requested item, click on "Receive Items on ILL' tab you will be getting a screen as displayed below:

Libra	y Name	SSMT libra	y	- Reciev	e Date	11/14/2008	×	
Rece		Details On ILL						
		1ember Code 89935100001	Name Yatrik	Book Title My exp. of T			Recieve Date 11/14/2008	
/ *		83335100001	таля	My exp. of 1	uen		11/14/2008	

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As soon as you choose the library, you will get list of all the items requested to that library, select the item and click on 'Receive' button to receive those item.

Arrival intimation and Issue Item to Library Member

If you want to send arrival intimation to your library member, click on 'Arrival Reports' tab, where after selecting the library you can generate arrival intimation for the member.

Issue Item(s) Detail on ILL Select Library Name	Book Title	Arrival Date	Library Code	
SSMT library	My exp. of Truth	11/14/2008	ILSSM1001	

To issue items, click on 'Issue' tab, enter the member code/ID, you will be displayed all the items requested by the member, choose item(s) you want to issue and click on 'Issue' button to lend the item(s).

Return and Reminder Letter

To return item (which has been bought under ILL) from the member click on 'Return' tab. The screen reproduced below will be displayed



lles	fember Code	189935100001	Name Yatrik Pa	itel		
	Library Name	Book Title	Arrival Date	Issue Date	Library COde	
1	SSMT library	My exp. of Truth		5/21/2010 12:00.0		
*						

Enter member code/ID in above screen, you will get listing of all the items which has been issued to the member, select the items you want to return and click on 'Return' button.

In case if you want to generate reminder, click on 'Reminder to Member' tab, enter the member code/ID and click on 'show' button.

Send Items Back to Parent Library

Once your member has returned the item, you may want to send it back to the library from where it was borrowed Click on 'Send to Library' tab to do so.

	ns Returned to ILL Libra	a. Dataila				
	Select member code	member Name	Book Title	Arrival Date	Issue Date	B
#	189935100001	Yatrik	My exp. of Truth	11/14/2008	5/21/2010	5/:
<						3

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If you want to see the reports click on 'List ILL' button after entering the desired period, you will get listing of all ILL transaction done within that period.

4.3.2 Lending Item(s) on ILL

Steps involved in lending of item from your library on ILL are as follows:

- Receive a Request (from another Institute's Library)
- Find Accession No. of the requested item : Input Accession Nos. of item(s) through Send Reminder to the Institute(for overdue item(s))
- Receive items return by the borrowing library Generate requisite ILL reports

Reference Request Date 5/21/2010 Sending Date 5/21/2010 ILL Item Lending Detail Accession No Library Name Request Date Request Refe Send Date 1001 SSMT library 5/21/2010 ILL 5/21/2010 *	Reference Request Date 5/21/2010 ILL Item Lending Detal: Accession No Library Name Request Date 5/21/2010 ILL Item Lending Detal: Accession No Library Name Request Date Sending Date 5/21/2010		Acce	Title	SSMT library				
Accession No Library Name Request Date Request Refe Send Date 1001 SSMT library 5/21/2010 ILL 5/21/2010	Accession No Library Name Request Date Request Refe Send Date 1001 SSMT library 5/21/2010 ILL 5/21/2010			Reference [8	Sending Date	5/21/2010	
		,	-	Accession No	Library Name				

Issue Items on ILL to External Libraries

Once you receive request from external library, and if you want to issue items on ILL, please click on 'Issue' tab, you will get screen reproduced below:



In this screen, If you want to issue item, first click on issue button, enter accession number of the item(s) you want to issue, Choose the borrowing library(which should have been entered as Institutional Library in Administration Module), You may also input reference number, which can be either letter number or any other communication from borrowing library. To complete the transaction, click on 'save' button.

Please note that you can issue book to ILL only if the library has given proper privileges through Administration Module.

Reminder to Library

In case the library does not return the book(s) in time, and if you want to send a reminder to that library, please click on 'Reminder to Library' tab. Choose name of the library which want to send the reminder and click on 'Show' button, you will get a reminder letter ready with listing of all the pending items from that library.

Return of Item sent on ILL

To return items which have been issued on ILL click on 'Return' tab, you will get the screen reproduced bellow:

Retu	medite	ms on ILL Detai	bs			
		Accession No.	Request Date	Reference	Sending Date	
1 *	Z	1001	5/21/2010 12:00:0) ILL	5/21/2010 12:00:0	
*						
		0	Receive Ca	ncel Exit		

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To return item, choose the library to whom you have issued the item(s), you will be displayed list of all sent items issued to that library, choose the item you want to return and click on 'Receive' button.

Report on ILL Lending

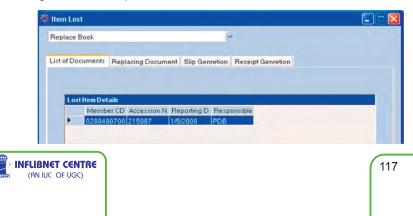
To get listing of all the items which has been sent under ILL, please choose 'Report' tab, you will be prompted to enter duration for which you want to have report, click on 'Show' button to generate report of all the items issued under ILL.

4.4 Maintenance

The collection of a library is generally available to all the users. It's status remains either 'available' or 'issued'. But there are situations when some of the items are either temporarily NOT available on (taken out, Binding or Damaged hence taken off the shelves for Repair). Some item(s) are permanently removed from the collection – may be Reported Lost, Withdrawn due to various reasons (like – outdated, beyond repairs, missing or lost). In such cases we have to update the status of such items. This will help users latest status of a specific item. Choose appropriate action from the menu under Maintenance and update the Status of a specific item by entering the Accession No.

4.4.1 Lost Item(s)

This option enables further operation on items which has been tagged as lost via 'Transaction' menu. If you click 'Lost' button of menu, you will get the screen reproduced below:



Please note that any item which has been lost by any member, there are two options available, either member can replace the item or pay correct fine.

If member wants to replace the lost item, choose 'replace book' option from combo box on top, you will also be able to see listing of all items, select the item you want to replace and then click on 'Replacing Document' tab. You will get the screen reproduced below:

Old Acc.	No 215087	Mem	ber ID	028849070027			
1	itle Microprocesson a	architecture programn	ning a	nd applications /			
Aut	hor Gaonkar, Rames	Geonkat, Ramesh S					
Call	No TK 7895 M502						
		E	dition	2nd ed/			
Rea	son						

Enter the reason or remarks in field labelled 'Reason' and click on replace button, this book will again be available for circulation.

If member wants to pay for the cost of lost book, please choose "Amount Recovery" option instead of 'Replace Book', select the document as explained above and choose 'Slip Generation' tab, you will get the screen reproduce below:

Amount Recovery			×			
ist of Documents	Item Information	Slip Genretion	Receipt Genretion			-
1	Blip No 1000002	1	Slip Date	5/21/2010	1.00	
Men	nber ID 0288490	70027	Accession	215087		
	Fine Los		Issue Date			
R	ecover 195.00		User Code	superuser		
		Pa	yment			

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Enter the amount you want to recover from member and click on payment button. Now finish the process by going in to 'Receipt Generation' tab, where you can generate a receipt and complete the amount recovery transaction.

4.4.2 Binding

Choose this option for sending titles for binding or for removing titles from circulation for binding.

Binding has been divided in following sub processes:

Choose the items for binding Preparation of order for binding Receiving and Invoicing of bound items Payment processing for received invoices Choose to Items of Binding

lect Accessio	on S	Order for Binding	Invoice & Receiving	Payment			
			Accession No.	2	_		
	Rem	Binding Details					
		Accession No	BookStatus	Title	Author	Material	
	•	81 82	Available Available	Infreared determinati Advances in enzymol		Textual Documents Textual Documents	

Using this option, member can choose the items which needs to be send for binding. To exercise this option click on "Select Accession #" tab you will get the screen.

In above screen enter/scan Accession Number one by one, click 'Binding' button when you are done, so all the items will be ready to be sent for binding.



Order No	ord/bin/21/05 ¥	Invoice Receive Date	5/21/2010		Discount Amount	20.00
Invoice #	inv/bir/21/05	Forwarding Date	5/21/2010		Overdue Amount	5.00
Invoice Date	5/21/2010	Received Documents	0		Misc Amount	2.00
Order Documents	2	Invoice Amount	100.00		Net Amount	73.00
82	82	Advances in enzymology and rel	ane 5/21/2010 12:00:	200		

Preparation of Order for Binding

To prepare Order for binding, enter order no, Budget Head, Binder's Name and Binding type, also enter price per document. Please note that the list of binders will be picked up from Administration Module's 'Serial Vendor master'. Tick mark the books you want to send for binding and click on' save' button.

Order		ord/bin/21/05	Budget Head	2005-06-UL	Books & Perior 🛩		Expected Date	5/21/2010	2
Bi	nder Shee Ram B	inding and 💌	Binding Type	Brown	2		Price/DOC		200.00
-	_	_		_	_				_
Bind	ing Order Details								
	Select Bind No.	Accession No.	Book Title			Price			
	₽ B1	81 82	Infreared determ						
1	P 82	82	Advances in enz	ymology and	related subject	200			
*									

Receiving and Invoicing of Bound items

This process enables you to receive the items which were sent for binding and process of the invoice. To receive item against a particular order, please select order number as shown in screen shot given above, enter the invoice number and other payment details, and choose the items you want to receive. Click on "Save" button to complete the process.

Payment Processing for Received Invoice

To process the payment of invoice received against binding order, click on "Payment" tab, the screen will enable you to choose invoice, enter payment details against that invoice to complete the payment process, click on "Save" button.

4.4.3 Damaged Item(s)

This option needs to be exercised when some items of library collection are damaged and you want to tag them so as to take out of OPAC/Circulation. Once you click 'Damaged' button the screen reproduced below will appear:

+	Accession # Title Author	83 Temperature a Winslow, C E A		tus Available
1	naged Item(s Accession	Book Title	Status	
	83	Temperature	Damaged	

To tag any item as 'Damaged' enter/scan accession number of that item and press 'Damage' button, If one wants to re-introduce damaged item for circulation, select the item and press 'Repaired' button.



4.4.4 Missing Item(s)

This option is useful for handling missing items from the collection. An item can be tagged as missing using two options; You already have seen one of the option in the Transactions menu and another is using this option. To tag any item as missing, click "Missing" button of transaction menu. Select 'Missing Process' tab You will get the screen reproduced below:

			Т	itie Exportfolledby	and in alloon I	
Me	mbercode 189935100	0001 Acc. No 84	Aut	hor	Status	
٩i	s sing Item Details					
	Accession No	Missing Reporting By Me	Forename	Sumame	Missing Date	^
	217102nl	009301050629	SMITA BHARTI	SMITA	10/1/2005	
	ms2791	014518060046	PRATIK	DALAL	3/9/2007	
	SW12535	018716060046	KOMAL	KISHNANI	9/5/2007	
	g42349nl	009201060026	KRUPALI	PATEL	7/11/2007	
	262529	002801090003	JHANVI	SHAH	11/11/2009	
						8

Enter the Member Code/ID who has reported as an item missing and then the accession number of item, and click save button. Item will be tagged as missing.

If the missing item is being traced out, click on "Found Process" tab, you will get the screen reproduced below:

Acc. No	217102vl	Title	Principles and practice of management /
Status	Minang .	Author	Prayad IL M
Reported Member	009001050629	Missing Date	
Trace By Member	Library Staff	Found Date	5/21/2010
Remarks			

Enter the accession number of traced book, enter the requisite details and press 'Found' button, this item will be now available for circulation.



4.4.5 Withdraw Item(s)

This option should be exercised when you want to withdraw item(s) (temporarily/permanently) from circulation. To withdraw item(s). Click on "Withdrawal Process" tab, enter/scan accession numbers of the items to be withdrawn and click on 'Withdraw' button as shown in the screen reproduced below:

lter	n Withdrawal De	etails			
	Accession No	BookStatus	Title	Author	Material
•	22334	Available Available	a share where a	Joshi, Mahad Varerkar, Bha	

To re-introduce withdrawn item click on "Re-Introduce" tab , you will be getting list of all the items which have been withdrawn. Select the item you want to re-introduce back and click on "Available" button.

4.4.6 Status Report

User can get the status wise list this option.

4.4.7 Maintenance Report

One can get the list of lost, missing as binding items between two dates. Select option and enter two dates and click on "Display" to display the report.



5.0 Serials Control



Please go through the recent definition of a Serial in MARC21 to understand its nature better. Also please get thoroughly familiar with the data elements (like other resources) of serials as a resource.

Serials/Journals are now called as 'Continuing Resources'. More apparently described now, the MARC categorises Serials, Journals and other similar type of resources as continuing Resources. Apart from data elements related to title of the journals, periodicals, serials, newspapers, the annual subscription, Vol.No., Issue No. etc. are entered into the data records of a collection.

SOUL has full-fledged module to tackle variety of issues associated with these type of resources. Please ensure the master data (Administration – Serial Master) is up-to-date in terms of data-entry window.

The process of selections of titles, approval process, placing orders etc remains more or less the same as the Books.

The serials control module has following seven sub modules

- K Titles (Serials)
- Suggestions
- Subscription
- Payment
- Check-in
- Commercial Binding
- In-House Binding

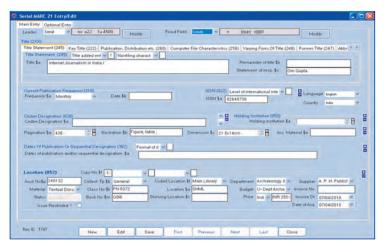
INFLIBNET CENTRE (AN IUC OF UGC)

5.1 Titles



All the serial titles (mainly those which are subscribed to by the Library), in all the formats (like print, electronic, CD-ROMs, online etc) are entered into the database in MARC21 format. Abridged functional version of MARC21 is available in Title Entry option. Please ensure that title details entered in either formats.

5.1.1 MARC21 Entry/Edit



Entering Leader and Fixed Field

As explained in Administration Module leader and fixed fields are necessary elements for any record following MARC21.

Leader Serial v nc a22 1u 4500 Modify Fixed Field Serials v n (rdp[r] zijijij0 Modify

You can choose leader/fixed fields from predefined template by exploring the combo-box and choosing right type of material, If you want to modify leader/fixed fields specifically for the record you are entering please choose modify button and select appropriate values,



please note that the changes done will have effect only in current record which you are creating.

Entering Title Information

According to MARC21 the main title of a journal will be rendered in "Title Statement" tag representing 245 as shown in the screen produced below.



However, the software also has feature of including various other types of title e.g. Key Title, Publication Distribution, etc, Computer File Characteristics, Varying form of Title, Former Title, Abbreviated Title, etc. Please input in all the fields as per your requirement.

Other Information Related to Serials



Other information like Frequency, Date of Frequency, ISSN Number, Language, Country, Coden Designator, Holding Institution, Pagination, Illustrations, Dimensions Accompanying Materials and Date of Publications need to be entered as shown in screen reproduced above.

Entering Local Information

Local Information (MARC Tag 852) can be entered in same way as explained in data entry part of (Cataloguing Module)



Entering Optional Fields

Optional Entry Screen in serial has facilities for entering Subject Added Entries, Notes, Corporate Names, Electronic Location and Series Information, Entry of these fields will be same as explained in Data Entry section of Catalogue Module.

5.1.2 Title Entry

SOUL Facilitate users using to use only essintial fields. Titles must be entered in the given below form for further processing e.g. Ordering, Renewals of Order, Schedule Generation etc.

Title entry screen has provisions for entering Title, whether it is bound/indexed or not, type of subscription, Language, Department, Subject, Class No, ISSN, Coden, Location, Publisher and supplier details, mode of receipt, price details etc. as shown in screen reproduce above.

			Title	Entry				
of 2 2 of 2								
Title	PC Quest							
Code	P0061	Bound (Y/I	N) N	Annual Index	(00N) N	Subsci	iption Type	Subscripti v
Abbriviated Title	PCG							outripe.
Language	English	~	i.		Subject	Educ	ational Dige	st 🗸
Department	Computer Engine	ering ~			Class No.	L11	E24	~
ISSN	3489651×		co	DEN	L	ocation	FF	
Publisher	Cyber Media (I) L	td. 👻	F	Tace Mumba	ai	Country	INDIA	
	Publisher Is S	upplier						
Supplier			F	lace		Country		
Receipt Mode	Direct	~	Bu	idget UGCS	AP(R) Dept	of Archae	ology &(20	003:2004) 👻
Currency	India Rupees	~	Conver	sition 1.00		Original I	Price 1200) (* 1. – 1. – 1. – 1. – 1. – 1. – 1. – 1.
			(0)			Price (Rs.) 1200	.00

In second part of this title entry screen, user can enter delivery mode, status, frequency, volume and issue information, subscription details, parallel titles, language, physical medium, subject, keywords, URL Address, etc.



• □)isplay All	Filter		
Title				_
	Record Id	Title	ISSN	
	A0015	Annual Review of Nutrition	0199-9885	
	A0016	American Journal of Clinical Nutriti	0002-9165	
	A0017	American Journal of Botany	0002-9122	
	A0018	Annals of Botany	0305-7364	
	A0019	Analytical Chemistry	0003-2700	
	A0020	American Journal of Mathematics	0002-9327	
	A0021	American Mathematical Monthly	0002-9890	
	A0022	Annals of Mathematics	0003-486X	
	A0023	Arkiv for Matematik	0004-2080	
	A0024	Applied and Environmental Microbi	0099-2240	
	A0025	Applied Microbiology and Biotechn	0175-7598	
	A0026	Advances in Applied Probability	0001-8678	
	A0027	Annals of Probability		

5.1.3 Title Update

Title Update option will allow you to make any corrections in the details of a specific record. The option will open screen for Browsing Titles. Double-click on a specific title from the list you want to update.

Delivery Mode	Register V Status Active V Frequency Monthly
Volume From	To 121 To 12 Lead Time 12 Issue/Volume 12
Subscription From	21/05/2010 V To 21/05/2011 V Year Of Publication 2010 C Edition Indian
Parallel Title	Language English
Other Title	
Physical Media	Textual Documents Subject Keyword(s) Computer Science
URL Address	http://www.pcquest.com
Note	

Click at modify to edit the details of the title on the screen. Click 'Save' to effect the changes.



Entering Holding Details of a Title

Option from this Update will allow you to store additional information about this Holding like Missing Issues etc in Notes format. To feed-in holding details of a title, please click on 'Title Holding' button, you will get screen shot as reproduced below, enter the requisite values.

	Title Holdings
Title Code	DDDR- Name American Economic Ronew
Code	Name American Economic de cociation Country UNITED STATES
Other Location	Frequency Freeliner a real ISSN DODE-2000
Missing Remark	

Please do not forget to 'Save' if you have made any changes in the Title Holdings – details.

5.1.4 Article Indexing

Article indexing is an additional feature of SOUL 2.0. Articles from the periodicals/ serials can be scanned and the files can be attached to the relevant records of the title using MARC-21 format.

Screen reproduced below appears when Article Indexing option is selected. Select the record by using Edit option where Record ID, Title etc can be searched to find specific record.



ISBN Six Record Carbon Number Six 124555 Tale Statement (245) No asside enzy + 0 P + 0 Tale Statement (245) No asside enzy + 0 P + 0 Remainder of Tile Six Statement of Reso Sic Dy Yatrik Patel Personal Name Perso	sader Serial ·	nc a22 1u 4500	_		Modify Fa	red Field (006/8)	Books +	n iligriiiZ	100		Mod	ty .
Main Heading Sis Calculta Mathemetial Society Extrice Sis Uniform Trice Sis Marath Sanshodhan P Publisher, Place Sd Calculta CAD12 1996. CODEN dop Sy Phy das Sh Mil 352. ISSN Six C Record Control Number Six 124555 Tale Statement (245) No asside enzy Image: Calculta CAD12 1996. CODEN dop Sy Phy das Sh Mil 352. Tale Statement (245) No asside enzy Image: Calculta CAD12 1996. CODEN dop Sy Phy das Sh Mil 352. Tale Statement (245) No asside enzy Image: Calculta CAD12 1996. Code Calculta Sis Mil 352. Mil 352. Tale Statement (245) No asside enzy Image: Calculta Calculta Sis Mil 352. Mil 352. Personal Name Remainder of Tale Sis Satement of Resp. Sc. by Yatik Patel Satement of Resp. Sc. by Yatik Patel Satement of Resp. Sc. by Yatik Patel Personal Name Personal Name Patent sensociated with a name Sd 1973. Fuller form of name Sd 1973. Fuller form of name Sd 1973. Patent terms Se Tale Studget(S00) Add Note(S00) Satement of Resp. Sc. by Studget Studg	Search Host Item (77	3 St) Calcutta Mathem	atical Society			Ok	Volum	e No & Issue No(77	35g) Vol.2	- 198.1		
Publisher, Pace 55 Calcula CA012 1995 CODEN degn 5y Pry decr 5h Wil 352 Holding Iretitude Sa ISSN 5x Pacced Carbon Number 5w 124555 The Shatement 2455 No added enery + 0 0 + 0 The Sale Analysis of Laplace Theorum Remainder of Tile Sb Statement of Remp 5c by Yack Pale Personal Name Personal Name (100700) Sumarie + 1 Analytical entr + 2 Added Entry Personal Name (100700) Sumarie + 1 Analytical entr + 2 Added Entry Personal Name (100700) Sumarie + 1 Analytical entr + 2 Added Entry Personal Name (100700) Sumarie + 1 Analytical entr + 2 Added Entry Personal Name (100700) Sumarie + 1 Analytical entr + 2 Added Entry Personal Name (100700) Sumarie + 1 Analytical entr + 2 Added Entry Personal Name (100700) Sumarie + 1 Analytical entr + 2 Added Entry Personal Name (100700) Sumarie + 1 Analytical entr + 2 Added Entry Personal Name (100700) Sumarie + 1 Analytical entr + 2 Added Entry Personal Name (100700) Sumarie + 1 Analytical entr + 2 Added Entry Personal Name (100700) Sumarie + 1 Analytical entr + 2 Added Entry Personal Name (100700) Sumarie + 1 Analytical entr + 2 Added Entry Personal Name (100700) Sumarie + 1 Analytical entr + 2 Added Entry Personal Name (100700) Sumarie + 1 Analytical entr + 2 Added Entry Personal Name (100700) Sumarie + 1 Analytical entr + 2 Added Entry Personal Name (100700) Sumarie + 1 Analytical entr + 2 Added Entry Personal Name (100700) Sumarie + 1 Analytical entr + 2 Added Entry Add Subject/S000 Add Note(5000) Location (1052) Copy No St 1 + 2 A + 2 Activities State Subject (1000 Add Note(5000) Subject State	lost Item Entry (773)		-						1	Holding Ins	itution (8	(50)
Publisher: Place Sd Calcuts CA012 1995 CODEN degn Sy Phy dex Sh W3.82 ISSN Sr. C Record Control Number Sw 124555 Ide Statement (AH5) No added entry 6 g 9 g 9 g Intel Statement (AH5) No added entry 6 g 9 g 9 g Intel Statement (AH5) No added entry 9 g 9 g 9 g Intel Statement (AH5) No added entry 9 g 9 g 9 g Personal Name Remainder of Tiles Sb Dy Yathit Pahel Added Entry Personal Name 1 Addslytical entry 2 Added Entry Personal Name 9 addity Yathit, Pahel 1 160730, Sumame 1 URL (0550) Su HTTP 4 Version of rame 1 1 thtp://www.inflichet.ac.im-yathit 2 Add Subject(0500) Add Subject(0500) Add Subject(0500) 2 2 2 Locotion (852) Coopy No St 1 # at an	Main Heading Sa	alcutta Mathemetial S	ociety	Edit	tion Sb 1		Uniform Title Ss	Marathi Sanshodi	han P	Holding los	in de Sa	
ISSN Sx	Publisher, Place Sd	alcutta CA012 1995.		CODEN de	sgn Sy		Phy: dscr Sh	viii,352		notory ins	indie 24	:
Ite Sa Aratijos of Lapize Theorem Remander of Tite Sa Statement of Rep Sc by Ydtirk Patel Removal Name Remova	ISSN Sx		10			Record Co	ontrol Number Sw	124555				
Statement of Resp.S.: by Yatik Patel Select File Geer Personal Name ************************************	ide Statement (245)	No added entry	0 0		0			Attachment				
Personal Name Personal Name 1 Analytical entr. • 2 Added Entry Personal Name Participation 1 Analytical entr. • 2 Added Entry Personal Name Participation Participation 1 Manual Sea 1 VERL (SSS) Su HTTP • 4 Version of rise. • 1 Http://www.infiltenet.ac.inv-yatrid 2 Location (SS2) Copy No St 1 • # • # Add Subject(SDO) Add Note(SDO) • # # Location (SS2) Copy No St 1 • # • Add Subject(SDO) Add Note(SDO) • # # Add Subject(SDO) Add Note(SDO) • # Location (SS2) Copy No St 1 • # Add Subject(SDO) Add Note(SDO) • # # Lacation (SS2) Copy No St 1 • # # Add Subject(SDO) Add Note(SDO) • # # Add Subject(SDO) * 0 Coded Location St Main Library • Status Exatal DOcu · Cons No St MC Shehymp Location Sc Price Ind •	itle Sa Analysis of L	aplace Theorum	-						s	elect File	Clear	
Add Subject(000) Add Hoter(SDQ) Location (852) Cory No St 1 # # Accn NoSp 240109 Colect Tp Sb • Coded Location Sf Main Library Department • Subplet Mainel Textual Docu Cleans No Sh HC 79 E0 T3 Location Se SML Budget Innoice No Status round Book No Sm M2 Shelving Location Sc Price Ind - USD 22.5 Innoice DL 25/1220208	Personal Name (100 Personal na	me Sa Patel, Yatrik,	• 1 Analytic	cal entr		ed Entry						
Location (852) Copy No St 1 # # Acon NoSp 240109 Collect. Tp Sb • Coded Location Sf Main Library • Department • Supplier Material Textual Docu • Class No Sk, HC 79 EB T3 Location Ss SML Budget • Inncie No Status tours Book No Sm M2 Shelving Location Sc Price Inncie DC 25/122008 • #	Personal Name (100 Personal na	me Sa Patel, Yatrik,	• 1 Analyti	cel entr 🔻		ed Entry						
Acon No5e 240109 Collect To Sto Coded Location 5f Main Library - Desemment - Supplier - Material Docu - Class No 5k MC 79 E6.13 Location 5s SMML Budget - Inelice No Status Incomer - Book No Sm M2 Shelving Location Sc Price Ind - USD 22.5 Innoice Dt 25/12008	Personal Name (100 Personal na Relator te	me Sa Patol, Yatrik, rm Se			2] 1 Add	ed Entry Dates		f name Sq	}			
Material Textual Docury Class No Sk. MC 79 E0 13 Location Se SMML Budget • Inncice No Status Instant Book No Sm M2 Shelving Location Sc Price Ind. • USD 22.5 Inncice DL 25/12008 []+	Personal Name (100 Personal na Relator te	me Sa Patul, Yatrik, rm Se 4 Versio	n of res • 1	http://www	2 Add	ed Entry Dates		f name Sq	9			
Status (Development) Book No Sm M2 Shelving Location Sc Price Ind. + USD 22.5 Invoice Dt 25/12/2008	Personal Name (100 Personal na Relator te URL (856) Su HTTP	me Sa Patel, Yatrik, rm Se • 4 Versio Ac	n of res 🔹 1 8d Subject(6)C	http://www X) Add N	2 Add infilbretac in/- ote(5XX)	ed Entry Dates yatrid		f name Sq	3			
	Personal Name (100 Personal na Relator te URL (856) Su HTTP Location (852)	me Sa Patel, Yatrik, rm Se • 4 Versio Ac Copy No St 1	n of res + 1 Id Subject(6XC	http://www X) Add N +#	2 Add	ed Entry Dates yatria	Fuller form o	fname Sq				
Issue Restricted 7 Date of Acg. 01/01/1900 U+	Personal Name (100 Personal na Relator te URL (856) Su HTTP Location (852) Acon NoSp 240109	me Sa Patel, Yatrik, m Se	n of res + 1 Id Subject(6XC	http://www Add N +# + Co	2 Add inflibrietac inv- ote(500) •	ed Entry Dates yatris a (Main Library	Euller form of Department	fname Sq : E	Supplier		-	
	Personal Name (100 Personal na Relator te	me Sa Patol, Yatrik, rm Se			2] 1 Add	ed Entry Dates		f name Sq]			

For doing article indexing with the SOUL 2.0, you need to retrieve the journal by making search through title of the journal in the "search Host Item" [tag 773]. The system will retrieve the item in the window, where one needs to link the articles of the issue with the retrieved journals by using the 'Title Statement' representing tag 245 along with other associated information of the article such as author of the article, electronic location of the article or the full text of the article, if any available, in different formats such as .pdf, .doc, etc.

You may also attach the file by filling up details in 'Attachment' field appearing on the window. 'Save' to store the changes.

5.1.5 Title Report

This option will enable you to generate report on titles. The report parameters are Location, Department, Subscription, Publisher, Supplier, Frequency, Delivery Mode, Class Number, Language and Subject.



5.1.6 Title Holding Report

This option will enable you to generate report on holding of titles, the report parameters are Location, Department, Subscription, Publisher, Supplier, Frequency, Delivery Mode, Class Number, Language and Subject. Select desired criteria and input appropriate values to generate this report

Title Holdin	ng Repor	t			-			
Parameter	Departm	nent	×	Value	Persian, Arabic &	2	Displa	y
2111	1	of 1	21.1	- 3	1300	100%	1	
			Repo		le Holding Re partment = Persian		du	
Having Det	ails	Lacki	ng Deta	nils	Remarks	Missin	g Issues	Available Issues
Nos. 123 - 1 - 152	39, 141							NULL
Printed On : Report generated								1

5.2 Suggestions

The Library normally receives suggestions from its users (faculty, students, and professionals) to add a specific title. Select 'Suggestions' option to enter details of the suggestions received.

5.2.1 New Request

For entering new requests received from the user, click on "New Request" button, you will get the screen reproduced below. Enter basic details of request as shown below. Please note that fields which are labelled in red colour are mandatory.



		Ne	w Re	quest				
Title Request No	7,01	Request	Date 21	/05/2010	Refere	ence No	123456	
	Data Quest							
Department	Computer Er	gineering	× 1	Name AANA	L PARIKH	1-00854	8080040	1
Publisher Name	AATCC	~	Place N.C	D.	🗸 Cou	ntry U	NITED STATE:	s
Supplier Name		~ <u>8</u>	Place		- Cou	intry		ŀ
Frequency				bscription Da	te			
requency	Monthly		∽ F	From 21/05/	2010 💌	То	21/05/2011	~
ISSN	23554323	Requested Co	opies 1	Physic	al Media	Irregul	ar Serial	~
Subject	Computer se	cience, informatio	n&g 🛩		Edition	Asian		~
Budget	2008 Bindin	g Dummy(2008:	2008; 🛩			India P	Rupees	~
Conversion Rate Remarks	1.40	Original Pri	200	P	rice(Rs.)	X.		
				-		P	iblisher Is Sup	plie
		Cancel	Brows	e Sa	ve			
		Clear	Delete	Clo				

5.2.2 Update Request

To update any request that has been previously entered please click on "Update Request" button, you will be prompted with screen reproduced below.

Bro	wse Titles			
۲	Display All	O Filter		
	litle: Request No.		Search	
	Request	Requested Title	Requester's Name	Requ Department
+	791	Data Quest	AAKASH JAIN-0020	5/21/2 Accounting & F

Find out the title of the request you want to update and double click on same (or click browse), you will be allowed to modify the details of your chosen request.



5.2.3 Select for Approval

Once all the request has been entered, you need to send the list to Approval Committee or to the concerned authorities for approved. Choose the titles approval committee by using appropriate filter and click on save button.

🔆 Sei	rial Control Module -> Suggestio	on -> Select For	Approval			🗵
		Sele	ect For Approval			
	Filter All 🗸	Select Search				
		Select Value		- S	earch	
	Select Title		Department	Requisted By	Publisher	Budget
>	☐ Data Quest		Accounting & Financial M	AAKASH JAIN-0	AATCC	2005-06-UL B

5.2.4 Approval Process

Once you receive concurrence of approval authority for requested title, click on "Approval Process" button, list of all requested titles will be displayed as shown in screen reproduced below:

Filter All Y	Approva Select Search	I Process			
	Salect Value		Search		
Title Data Quest	Department	Requested By AAKASH JAIN-002001	Publisher	188N	Pr
Requer Approve I Authorise	No Zi-05-2010 d By Libray Committee narks Meeting Dated (DDI Save	-	d O Rejected		



Double Click on the desired title and fill-in appropriate approval details against authorised by and save.

The data of 'Approved Titles' can be retrieved through various means from the following Menu:

Once serials are approved, order can be placed with local agencies or suppliers to subscribe the journals as explained in "Subscription" section.

5.2.5 Re-Approve Rejected Titles

There would be occasions, when some of the titles get rejected or some of them are kept on hold (till the appropriate Budget is available). If we have to revive the rejected titles, there is a process to bring them into SOUL and continue processing further. Click on 'Reapprove-Rejected ', List of rejected titles will appear. Select the appropriate title which was re-approved and proceed further for placing orders. We have an option to retrieve such titles through following Menu:



Input the appropriate details and click 'Save'. Next step is to merge the approved Titles into your database.

5.2.6 Merge into Database

Tick-mark the boxes against the titles – and click the Merge Button. MARC records for the approved titles will be created as soon as you merge records. Note down the record number(s) shown for future reference. You also have an option to Edit MARC record at this stage too. You may Edit the record later (after placing the Order(s) etc.).

	Merge int	o Database			
Select Title	Department	Requested By	Publisher	Country	ISSN
Awar-E-Urdu Awar-E-Urdu Chartered Secretary Data Quest Excise and Quatoms Reporter Excise and Quatoms Reporter Executive Chartered Secretary Sociological Bulletin	Persian, Arabic Accounting & Fin Accounting & Fin Commerce inclu Accounting & Fin	HEAD - Persian Undu &Ar HEAD - Persian Undu &Ar HEAD - Accounting & Fin. AAKASH JAIN-00200108 HEAD - Coommerce inc. HEAD - Accounting & Fin. HEAD - Sociology	Aiwan-e-urdu Urdu Academy Institute of Company AATCC Cen - Cus Publicatio Institute of Company Institute of Social Sci	UNITED STATE INDIA INDIA	543521

Click 'Yes' if you wish to edit MARC record, else 'No'. (It would be useful to note down the record number created for each title. This will help you to edit the MARC record later.

5.2.7 Request Report

You can print listing of all the requests by selecting appropriate filter criteria (Budget - wise, Department-wise or Date-wise) as shown in screen shot reproduced below.

	6							
Sug	gestions							
-	Request Rep	ort						
SOUL->Se	erial Control Modoule -> S	uggestion -> Report						
Filler by	Statuswise ~	Finer value	Approved	Date Between	21/05/2010 🔗	10 21/05/201	Dis	play
1	1 011		Rectues	t Details				
			and the second se	atus-'Approved'				
Req. No.	Title	Request Date	Publisher Name	Supplier Name	Frequency	Budget	Price	Ref N
Req. No. 676	Title Sociological Bulletin	Request Date 12/05/2006	Publisher Name Institute of Social Sciences	Supplier Name Créative Bocks & Periodicals Pvt. Ltd.	Frequency Three times a year	Budget 2005-06-UL Books & Periodicals	Price 500.00	Ref N HML/c



5.3 Subscriptions

Using this option you can place the order either directly with the publisher or with a supplier. Click on 'Subscriptions' to place order/renew subscription.

5.3.1 New Order

Select Order Process under Subscriptions Menu.



Order Process deals with raising order in the name of specific publisher/supplier. This menu also allows you to renew the subscription for the existing serials collection.

Order Process sequence is as follows:

First of all enter order number (It will be auto generated and has been enabled in letter number generation in Administration Module), Enter order date, Choose the publisher/vendor with whom you want to place the order Choose name of the supplier/publisher from list box, now you will need to chose type of order i.e. Firm Order, Standing Order or Temporary Order. You can also place, remarks if you want.

🕯 Serial Contol Module -> Subscriptio	n -> Order Process				[
	Order	Process				
New Renew						
Order No Ord/In#010	Date 21-05-2010 💌 Type	Supplier	V Nam	e Akshar Praksha	n Pvt. Ltd.	~
Type of Order Firm Order	Remarks			Add Titles fro	m list	
Select Title Ø Data Quest	Subscription D 5/14/2010	at Expiry Date 5/14/2011	Volume From	Volume To	Issue From	Issue
4						>
	Add Select A	dl Save	Close			

Usually titles will appear as per your chosen criteria of supplier/publisher, if you want to add more titles to an order for a particular supplier tick on "Add titles from List", and click on "ADD" button, approved titles will appear in the pop-up box – with an option to pick-up the ones for which you are placing the order. Tick-mark the ones you wish to add and Click 'Pick'. Once you pick-up the titles, they will appear in the window given above from where the Order Process was triggered.

Please ensure all the fields for given title are appropriately filled-up, Vol.no. (range), Issue (range) (if you have all the details). But remember - Delivery Mode field the mandatory delivery mode from the drop-down box – Airmail, Courier, Hand Delivery, Local, Parcel, Registered Post or Surface.

Click 'Save' button. Small pop-up box will appear with Order Value. as shown In screen shot.

Renewals

Renewals process is very simple - Under Order Process option, just click Renew button available next to 'New'. You will get following screen



New Renew Order Process									
• Search by Su	upplier O Search t	y Title	_			Search			
Vendor Name				View All Order	ra.				
Old Order No.	0055		¥	New Order No.		Type of Order			4
Renewal Date	21/05/2010	¥		Remarks					
Select Title	e			Subscription Dat	Expiry Date	Volume From	Volume To	Issue From	Issue
 ICF/ 	Al Journal of Marketi	ng Research		1/1/2010	12/31/2010	1	1	1	4

Search the title to be renewed by supplier name or by title itself, enter old order number, fill-up correct details against each title (including renewal period) and click 'Save' followed by 'OK' in the pop-up box.

Click on "Save" button to complete the process.

5.3.2 Cancel Order

This option can be exercised when you what is cancel the order either partially or fully. To perform this operation, click on "Cancellation of Order" button, you will be prompted with a window asking order number of order to be cancelled, fill in appropriate details, select the titles you want to cancel from that particular order, if you want to cancel entire order then tick on "Cancel Whole Order". After selecting all the titles click on "Cancel Order" button to complete the operation.

5.3.3 Purchase Order

Purchase order can be printed by clicking on "Purchase Order" button, one can print purchase orders by Order No, Order Date or Supplier. To print purchase order, fill in the appropriate values and click on display button.

Select option Order Date 🗠 Order Date between 20/	05/2010 😤 And 22/05/2010 🗠 Display
	100%
Purchase Order	
1 To.	Order Date:21/05/2010
Akshar Prakshan Pvt. Ltd.	
2/36 Ansari Road	
Daryaganj	
New Delhi 110002	



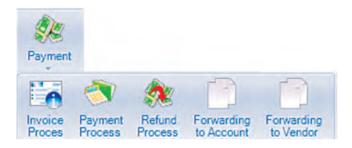
5.3.4 Order Report

There are a number of options to list created order, list of orders can be generated according to status i.e. All Orders, Generated Orders, Completed orders and Cancelled orders.

	Status	Generated 😁	Date	Between	20/05/2010	🛩 to	22/05/2010 💌
210	1 of 1		0.01	- 100	10 •	1	25 (T)
	Dana		rder R			00000	
Order No		ort by Status-'Generated' Order Date		Publisher		Price	Order Type
Order No		Order Date	Supplier		Name		Order Type Firm Order
		Order Date	Supplier	/Publisher	Name	Price	Firm Order

5.4 Payment

Once you place orders with publishers/suppliers, publisher/vendor would raise their invoices. Publishers/suppliers most of the time asks for advance payment for the subscriptions. Based on your Purchase Order they will raise the invoice(s). To complete the payment process, select 'Payment' option from the top menu-bar and initiate invoice process.





5.4.1 Invoice Process

As a first step in payment process, to enter invoice details against each order for which payment needs to be processed. Invoices can be entered either for all orders or standing orders. Please note that there may be cases in standing orders where invoice come after you have received serials.

All Or	ders Standing	Orders										
Pub	ce Processing lisher/Supplier		Search	Invoid	e No.	inv/int/050		Invoice Date	21/05/20	10 💌		
	Title	Order no	Start Date	End Date	Price	Handlin	Postage	Currency	Conv R	Discoun	Net Price	Cop
*	Data Quest	ord/inf/020	5/14/2010	5/14/2011	300	0	0	India Rupees	1	0	300	1
<					-							
-	alculation of Miss	c. Charges F	Remove from List]								0
Ca	alculation of Miss cellaneous Charg]								1
Ca Misc Bud	cellaneous Charg	ges On Net Amo Handlin	unt] tageCharge		Ne	t Amount	In INR			ľ	-
Ca Misc Bud	ellaneous Charg	ges On Net Amo Handlin	unt	tageCharge			t Amount tal Net An					-

Select the publisher/supplier from the drop-down menu – and click 'Search' button. All the orders placed with that publisher/supplier will appear with brief details.

Select the titles from the pop-up box for which invoice has been raised by the supplier/Publisher and 'Save'.

Fill-up Invoice No. and check whether all the other details are correct. On some titles we get discount (fixed percentage %) on published subscription rate. Fill-up the % rate in the discount column against each serial title. Click on 'Calculate Misc.Charges'. This will automatically calculate net price of the subscription. It will also appear in the 'Net Amount in INR' box on right side of the window.

You may also input other miscellaneous charges which are added to Subscription Cost.Normally they are handling charges and/or Postage etc. They are normally in lump sum. Click on 'Calculation of Misc. Charges' and input details in respective fields.



140

Il Orders Standing	Orders							
voice Processing Publisher/Supplier	Indian Schoo	l v Search	Invoice	e No.		Invoice Date	21/05/2010 💌	1
Title	Order no	Invoice Start	Invoice End	Issue R	Estimat Invoice	Handlin Post	ige Currency	Conv_R Net Pri
4								
Calculation of Mis	: Charges F	Remove from List						
Calculation of Mis]					
	ges On Net Amo Handli		_		NetAmoun	In INR		

Invoice cost will be calculated automatically, cross check the same with physically received invoice. 'Save' the information and Close to keep the already fed details intact.

5.4.2 Payment Process



This operation needs to be exercised for entering payment details for received invoice. Select the vendor from the drop-down menu. All the invoices raised by that vendor will appear in the central window. Tick-mark the box against the invoice you are planning to pay. Feed amount payable (i.e. Amount of the Invoice) – and click 'Calculate'.



				Payn	nent Pro	cess			
Select	All		~	Publisher/Si	uplier				
nvoice	Details								
8	Sele Invoice	No	Order No	Invoice Date	and a Date	-	And a loss Dailed	Anna Description	Description
		1.100	Orderingo	Involce Date	order Date	NetAmount	Amount Paid	Amt Payable	Remaining
	invint)		ord/int/020	5/21/2010	5/21/2010	300	Amount Paid	300	G 0
	Conc Internet		1.01.001.010	5/21/2010					
	invintion invintion invintion invintion invitient inv		ord/inf/020	5/21/2010	5/21/2010 Calculate	300		300	
Paymer Payme	invintion invintion invintion invintion invitient inv	Chec	ord/inf/020	5/21/2010	5/21/2010 Calculate Branc	300 h Name	0	300 ndia	

Select the option to make payment either in cash or by cheque/DD, credit card or (see 5.4.4 for forwarding letter to the accounts department of the institution for payment). Select appropriately and Save. Message of Payment Made appears.

5.4.3 Refund Process

Refund process is required in case where either publisher/vendor refunds amount to the institution for non-supply of certain issues or in case when the periodical ceases to publish. Find out the order number against which refund is received. Fill up the details with publisher's letter Reference No./date and Save. The amount mentioned against. Refund will get added to the 'Budget' against which this invoice was charged.

5.4.4 Forwarding Letter to Account/Vendor

This option facilitates user to generate forwarding letter to Account Section requesting them to release the payment. One can generate this letter by Invoice No, Payment Date and supplier.



	Subject:	Reques	t for Payme	nt	
Dear Sir/Madam We the payment for the sar		nvoices w	ith following	details, It is being re	quested to process
Invoice No	lı	nvoice Da	ite	Vendor Name- Place	Total Invoice Amount
B 11		0/02/2004		D K Joshi - Vadodara	1,000.00
Title	Price	Copies	Order No		
			N1		

5.4.5 Invoice Report

One can generate invoice register supplier wise, invoice report can be generated between range of dates as well as budget wise. This report will gave you status of each invoice.

5.4.6 Payment Report

This report will gave you list of all the payments generated against each order and received invoice, one can generate this report by supplier, date and budget as report parameters.

5.4.7 Refund Report

This option facilitates users to generate the report of refunded amount between particulars dates.

5.5 Check-In



The next logical step is to receive the issues of subscribed serials. But before we proceeding further, ensure that all the records for the serials in database have correct details in MARC format. To initiate check-in process, first step is to generate schedule of ordered title.



5.5.1 Schedule Generation

-		chedule O	Modify/Delete	Schedule				
Fil	er title							
	Title	StartDate	EndDate	StartVolume	Ctatlanua	EndVolume	Endlanus	
			31-12-2010		1	2	12	
			31-12-2010		1	94	12	
	Accounting	01-01-2010	31-12-2010	85	1	85	6	
	Accounting	01-01-2010	31-12-2010	10	1	10	12	
	Administrati	01-01-2010	31-12-2010	55	1	55	4	
	Advances in	01-01-2010	31-12-2010	42	1	42	4	
	American Ec	01-01-2010	31-12-2010	2	4	2	1	



Ensure that the requisite details are filled up - especially volume no., issues from to, lead Time (i.e. no. of days to receive copy after publication), publication date range, and tick the boxes as required. If you have subscribed serial in middle of the year (i.e. not the full volume),tick mark the check box 'First Volume is not Full" and enter starting issue and volume.

Click on "Generate Schedule" button, "Save" the changes to complete the process.

If you have to modify the generated schedule

There are some situations where arrival schedule of a title gets changed, in such cases you may need to review and modify previously generated schedule for that particular title. To do so select browse mode and choose Modify/Delete option. List of journals for which



schedule has been generated will be available. Double click on the title and click 'Regenerate Schedule' button. A pop-up box will appear as reproduced in screen shot below

where you will be able to modify the details. Make the required changes and click Save.

Regenerate S	ichedule					
Title Frequency	Data Quest Monthly		elete All Expecte elete Schedule (ified Date	15/2010
Volume Fron Issue From	Volume T	0 11 12	Volume Prefix Issue Prefix		Lead Time	2 e 12
	ue no with each volution Date 14/	ume no 05/2010	Reflect Cha	inges in M	laster Database	
	(Save	Close			

Schedule will be generated with Issue Date, Expected Date and its status. Save the schedule and click 'Close'.

5.5.2 Non Received Process

You also will be able to generate a report on Non-received Issues – based on the date of publication and expected date of receipt. Reminders to vendor/supplier/publisher can be generated based on the data stored in this schedule.

After trying all the means to obtain the non-received issues of certain periodicals update the status of all of them into Non-Received.

You can select titles by filtering them with title name or expected date, choose the issues you want to convert to "Non Received" and press "Convert to Non-Received" Button. This will get reflected in reminder reports.



	Processin	n of N	on - Rec	eived Iss	ues	
~		-	011 1100	onounos	, uoo	
•	Display All O Filte	r				
	Title					٦
F	Expected Date Upto	The second		-		_
	Expected Date Opto		unu	Sea	ch	
	Sele Title	SR No	Volume	Issue	Date of Publicati	14
•	American Ma	1	362	001	01/01/2010	3
	American Ma	1	362	002	01/02/2010	4
	American Ma	1	362	003	01/03/2010	
	American Ma	1	362	004	01/04/2010	1
	American Ma	1	138	001	01/01/2010	
	American Ma	1	138	002	01/02/2010	1
	American Ma	1	138	003	01/03/2010	
	American Ma	1	138	004	01/04/2010	1
	Asian News	1	11	011	27/02/2010	1
	Asian News	1	11	015	27/03/2010	1
<					3	F

5.5.3 Check-in Details

This option may be exercised to fill in check-in details for each issue of subscribed journal. When you click on "Check-in Details" list of journals will appear in alphabetical order. Click the title of the issue received.

				Check -	In Detail	s		
Titl	e	A B A Banking J	lournal	~	ISSN	0-5-	Frequency Handle	_
Pu	blisher	Şemşen Sam	and the second second	or traj	Flace	-11-1	Country	
Che	eck- in							
	Volume	Issue	Date of Publicati	Expected Date	Status	Receipt Date	Remark/Note	
	101	009	01/09/2009	01/10/2009	Not-Received	1/1/1900		
	101	010	01/10/2009	31/10/2009	Not-Received	1/1/1900		
	101	011	01/11/2009	01/12/2009	Not-Received	1/1/1900		
	101	012	01/12/2009	31/12/2009	Not-Received	1/1/1900		
	102	001	01/01/2010	31/01/2010	Not-Received	1/1/1900		
	102	002	01/02/2010	03/03/2010	Not-Received	1/1/1900		
	102	003	01/03/2010	31/03/2010	Expected	1/1/1900		
	102	004	01/04/2010	01/05/2010	Expected	1/1/1900		
	102	005	01/05/2010	31/05/2010	Expected	1/1/1900		
	102	006	01/06/2010	01/07/2010	Expected	1/1/1900		
	102	007	01/07/2010	31/07/2010	Expected	1/1/1900		
	102	nne	01008/2010	21/09/2010	Evnerted	1/1/1000		
			Add	Save	Delete	Close		
			First	Previous	Next	Last		



Choose the issue you have received physically, change the status from 'Expected' to 'Received' – Enter the date of receipt, write remarks if appropriate, correct other details if required and r 'Save' the updated record.

For additional issue(s), that are not part of generated schedule for a title, click on "Add" button, A pop-up box will appear – fill- up the correct details, change the status to received – write Remark if appropriate and 'Save' the updated record.

🗱 Add Additional Issues		
Volume No	103 Issue No 1 Status Received	~
Publication Date 21/05/2010	Expected Date 21/05/2010 Receipt Date 21/05/2010	(
Remarks		
	Save Cancel	

5.5.4 Remove Received Issues

This option will enable you to remove all received issues in the past. To perform this operation click on "Remove Received" button.

•		Filter	ng of I	Received Iss	sues	
	Title					
	Received Betw	reen		And 21//SCIII	Search	
	Title	Volume	Issue	Date of Publicati	Expected Date	R
	American Ma	356	001	01/01/2004	31/01/2004	13
	American Ma	356	002	01/02/2004	02/03/2004	28
	American Ma	356	003	01/03/2004	31/03/2004	28
	American Ma	356	004	01/04/2004	01/05/2004	13
	American Ma	356	005	01/05/2004	31/05/2004	90
	American Ma	356	006	01/06/2004	01/07/2004	90
	American Ma	356	007	01/07/2004	31/07/2004	26
	American Ma	356	800	01/08/2004	31/08/2004	13
	American Ma	356	009	01/09/2004	01/10/2004	14
0	American Ma	356	010	01/10/2004	31/10/2004	01



You will get list of all received issues. It is advisable to use filter like title or received dates.

Filter out your results using criteria according to your requirement and press "Export & Delete" button. You will be prompted to save the location of exported file (.csv) format, give desired location, a file will be created and your record will be deleted from the database.

5.5.5 Reminder for Non-receipt / Missing Issues

The titles which were not received for long time and some of them may not be arriving at all, reports can be taken out for sending them to the suppliers/publishers. Select 'Reminder Letter' from the Top Menu-Bar, select proper filter (By supplier/publisher/expected date) and generate the reminders.

5.5.6 Check-In Report

One can get the list of issues with different parameters like Expected Issues, Received Issues, Not Received Issues, Binded Issues or Any status. User can filter the list by title as well as user can list the issues between two dates.

5.6 Commercial Binging/In House Binding

Once the issues for one complete volume are received, you may like to send them for binding. Once received in Bound Volume format they will become a part of library's Main/Core reference collection. Therefore such individual issues will have to be removed from the general purpose collection. The process of removal can be performed by selecting specific titles, specifying the received dates and selecting the option 'Export & Delete'.

Binding modules facilitate us to send the issues of a specific journal for getting them properly bound. Various libraries follow different systems to monitor/stock such resources.

The Process of selection of titles and issues remains the same in case of commercial binding as well as in-house binding. They differ only because outside vendors (Binders) are paid for the Bound-Volume job-work. Therefore there is a process of raising order, invoice and payment by cheque/cash or through Accounts Department.



5.6.1 Preparation of Sets

The first task in bound-volume journals is to identify the titles and making the sets of each volume published in a given period. Fill up appropriate details e.g. set number, ISSN No, binding type, colour and embossing text. 'Save' the records.

					1000		on of S				
Se	tNo	set1		R	eceived On/Befor	re 21	/05/2010	v s	earch		
Tit	le	A.B.A.Ba	nking Jo	urna	1	v I	SSN 01	94-5947	Frequenc	Monthly	-
Pu	blisher	Simmon	v-Boardr	nan	Publishing G	Place	New York		Country UN	ITED STATES	
	Check	Volume	Issue	Sr	No Date of Publ	ication	Receipt D	ate	Status	Remark/Note	^
	-	100	001	1	1/1/2008		4/16/2008	242	Received		-
	~	100	002	1	2/1/2008		4/10/2008		Received		
1	V	100	003	1	3/1/2008		4/28/2008		Received		
	Г	100	004	1	4/1/2008		5/13/2008		Received		
	E	100	005	1	5/1/2008		6/3/2008		Received		
	1	100	006	1	6/1/2008		7/26/2008		Received		
	Г	100	007	1	7/1/2008		8/14/2008		Received		~
<											>
Bindi	ng Type	Cloth Bin	iding 💊]	Binding Colour	Brown		~	Embossing Type	Gold	Y
First F	age	1			Last Page	572			Index(Y/N)	N	
Embo Text	ossing	digit			Remark						_

5.6.2 Order Process

Use this option to create an order for the set prepared for binding. By clicking this option you will be able to see all un-ordered sets which you need to send for binding. Enter order number and dates, choose the budget head and tick the sets you want to send for binding, Enter the binding price against each set. Click on "Save" button to finish the operation. One can print order for binding from "Reports".



			Orde	Process			
Order No	ord001	16	Setno	-Titles			
Date Of Order	21/05/2010	~					
xpected Date	21/05/2010	*					
inder Name	Shree Ram Bi	nding and Prin	ting Works	*			
udget Head	2005-06-UL B	ooks & Periodi	icals(2005:20	*			
Check	Set @ Rs.	Set Price	Set No.	Bind type	Binding Color	Embose Type	Ord
	0 46.0714	0	13 set1	Rexene Cloth Binding	Others	Gold Gold	
0							>
Remark				_		7	
			-	0.1.1	Close		
		Retrive	Save	Delete	Close		

5.6.3 Receiving / Accessioning

This option enables user to receive the sets which were ordered for binding.

			Rece	ving/Acc	essio	ning			
House Rece Binder		deg wid heiting Va		Ord Last Access	er No.	ord001		9	
Check	Set No set1	Accession No 001	Accessi 5/21/20		(Class (null)	fication No	Location (null)		Starting Page

Select the order numbers for which you want to receive the sets enter the requisite details like Accession No, date, class number and location.



Please note that there may be journals which are getting split as after binding. To handle such cases click on "Split" button, you will be prompted to enter number of parts, enter the data, Now you can assign different Accession No.s to different parts of bound volumes Click on "Save" button to complete the operation.

5.6.4 Invoice Process

nvoice Binde	inv/001/2 Shree R	1/05 am Binding an		Date of Invoice Add Orders	21/05/2010	~	
• 1	 derno 1001	Send Date 5/21/2010	Receipt Dat 5/21/2010	budget code 2005-06-UL Bo	oks & Periodical	price 100	Overdue Fine
Forwar	 ACON	201	Forward Dat) 💌 To Wh	om Acc	count officer

This option enables you to process the invoice for binding orders.

To perform this operation enter the invoice no and date, Select the binder, clicking on "Add Orders" button choose the orders against which invoice is to be received. Select the corresponding order, enter the forwarding details as well as other fields and click on save button to complete the operation.



5.6.5 Payment

This option enables you to process the payment against received invoice. To perform this operation, select the binder for whom the payment is due. You will be able to see all the received invoices from that binder, tick mark against each invoice you want to pay as shown in screen reproduced below.

		Pa	yment/Acl	nowledge	ment	
Disp	lay All 🔘 Filter	Binder Name				
	Se Invoice No.	Invoice Date	Order No	NetAmount	Paid Amount	Amount payable
<u>۲</u>	♥ 212	4/27/2005	12	125.0000		125 (
<						>
	nt Details					
Rece	eipt Note No	int/rcpt/102	Bank Nam	e State B	ank Of India	
Rece	ipt Note Date	21/05/2010	Branch	Gujarat	University	
Payn	node	Cheque	- Bank Char	ges		
Cheq	ue/Draft No	123456789	Date Of Che	que/Draft 21/	05/2010	
Forwar	d Details					
No	23	Date 21/05	w2010 💌	Mode Couri	er 🗸	
Rema	ark none					
Acknow	ledgement Detail	\$				
No	32	Date 21/05	/2010			
Rema	ark none					

This interface also facilitates you to enter payment details i.e. receipt note no and date, Payment mode, bank details etc. along with forwarding remark. Please fill in requisite details and click on "Save" button to complete the operation.

5.6.6 Binding Reports



Binding Module consists of binding reports, reminder to binder, purchase order, bound volume labels which are needed to handle Bound-Volumes efficiently.



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OPAC is the end-result of all the effort we have made so far in creating and maintaining the database. This is the interface between the resources stocked in the library and the user-needs an efficient OPAC will fulfil all the information retrieval requirement of a user. It should be able to cater to all the needs of a 'novice' as well as an 'Expert' user. It should have options from simple search to Advance search like combination of using boolean operators between all the entry elements. SOUL has facility to approach the database with three different approach :

- 1] Simple Search (with fixed combinations of common fields)
- Boolean Search (Natural Language nomenclature but with AND, OR operators to join the fields); and
- Advance Boolean (Combination of using Boolean operators between any of the field tags from MARC records)

OPAC also has facilities to generate bibliographies. Online status of any item stocked, along with its location is available to save the time of the user.



6.1 Simple Search

Search	by Title	Econo	mics		Filter By Type o	f Material		
		v ,	Any Where In Word 📃 Exact Search		20	Y	Show Re	sult
	Sr.No.	Title / Rem.of Title	Title	Call No.	Location	Accessi	ion No.	Status
Г	1	Income stabilization for a devel	Income stabilization for a developing democracy: a st	HC 106 5/ M4I	SHML	8274		Available
Г	2	Economics for commercial stu	Economics for commercial students and business me	HB 171 /.C7E2	SHML	8790		Available
Г	3	Economics of public utilities /	Economics of public utilities /	HD 2763/.T7	SHML	5889		Available
Г	4	Engineering economics : work	Engineering economics works organization and man	HD 2351/.B8	SHML	6012		Available
Г	5	The economics of repressed in	The economics of repressed inflation /	HG 229/.C4E2	SHML	9142		Available
Г	6	Prelude to economics /	Prelude to economics /	HB 171/.07P7	SHML	9303		Available
F	7	Groundwork of economics /	Groundwork of economics /	HC 435/.M8G7	SHML	9485		Available
F	8	The Economics of poverty and	The Economics of poverty and discrimination. /	HC/109/P6S2.	SHML	GT21480		Available
Г	9	Introduction to economics /	Introduction to economics /	HB 171/.S3I4	SHML.	3481		Available
Г	10	Economics in practice /	Economics in practice /	HC 57/ P4	SHML	3494		Available

User can use following parameters to perform a simple search :

Title	~
Title	~
Title + Subject	
Title + Series	
Author	
Accession No	
Corporate Name	
Meeting Name	
Uniform Title	~

To perform search on any from any of the field listed above, select the field first and then enter your search term in text box .

If you want to filter your results by any specific type of material, please choose corresponding option by checking the option "Filter By Type of material".

Filter By Type of Material	~



One can also choose "exact search" or "Any where in word"

Economics	
Any Where In Word	Exact Search

If you want to search for your key term anywhere in the word/field, tick 'Any Where in the Word" where as "Exact Search" will give search results only if your search term is found in beginning of the field.

You can also restrict number of records by selecting corresponding number before pressing "Show Result" button.



Once results are retrieved, you can export selected titles in MARCXML format by pressing "MARCXML (Export)" button.

20		The second s			T57883	Arailable
17	the state of the s			SHML		Available Available
17	Labour economics /	Labour economics /	HD 8686/D2	FSWL	SW7248	Available
16	Labour economics /	Labour economics /	HD 8686/D2	FSWL	109867	Available
15	Indian economics a comprehe	Indian economics a comprehensive and contical surv	HC434.8/J28	SHML	2532	Available
14	Keynes and post-keynesian ec	Keynes and post-keynesian economics ?	HB 503/ G8K3	SHML	181064	Available
13	The statistical methods in econ	The statistical methods in economics and political sci	QA 280/ E2F5	SHML	256	Arailable
	14 15 16 17 18 19	13 The statistical methods in econ 14 Knynes and post-keynesian econ 15 Indian economics a comprehe 16 Labour economics / 17 Labour economics / 18 Managerial economics / 19 Managerial economics /	The statistical methods in econ. The statistical methods in economics and polificial sci Knynes and post-Reynesian ec. Knynes and post-Reynesian economics (Indian economics a comprehe indian economics a comprehensive and cortical surv Labour economics (Labour economics (Labour economics (Managenial economics Analysi, problems and case Managenial economics Analysi, managenial economics Analysis, problems and case Managenial economics Analysis.	13 The statistical methods in econ The statistical methods in economics and political cci 0.4 280/E275 14 Knynes and post-Represian ec Knynes and post-Represian ec HB 50/J 080/3 15 Indian economics a comprehe indian economics a HB 50/J 080/3 HB 50/J 080/3 16 Labour economics a Labour economics a HD 8060/D2 17 Labour economics f HD 8060/D2 HD 8060/D2 18 Managerial economics Analysis, problems and cares HD 2353 M2/J Managerial economics Analysis, problems and cares HD 2353 M2/J 19 Managerial economics Analysis, problems and cares HD 2353 M2/J Managerial economics 20353/M2/J	13 The statistical methods in econ The statistical methods in economics and political sci 0.A 280/E2F5 SHML 14 Knynes and post-Knynesian ec. Knynes and post-Knynesian economics / HB 503/08K2 SHML 15 Indian economics a comprehe indian economics / HB 503/08K2 SHML 15 Indian economics / Labour economics / HD 808/D02 FSWL 16 Labour economics / Labour economics / HD 808/D02 FSWL 17 Labour economics / Labour economics / HD 808/D02 FSWL 18 Managenial economics / Analysis, problems and cases HD 2353 M20 SHML 19 Managenial economics / Analysis, problems and cases HD 2353 M20 SHML	13 The statistical methods in econ The statistical methods in economics and political sci. 0A 280/E2F5 SHRL 256 14 Knynes and post-Knynesian ec. Knynes and post-Knynesian economics / HB 503/GBA2 SHRL 10164 15 Indian economics a comprehe indian economics / HB 503/GBA2 SHRL 253/2 16 Labour economics / Labour economics / HD 8866D2 FSVL 109867 17 Labour economics / Labour economics / HD 8866D2 FSVL 109867 18 Managerial economics / Analysis, problems and cares HD 2353 M2I. SHRL 245173 19 Managerial economics / Analysis, problems and cares HD 2353 M2I. SHRL 245173

The detailed bibliography of search results can be seen by selecting the titles and pressing "Show" button, on clicking of show button a window will pop-up with default as basic view.

Basic, Full, M	ARC Report	for Selected Re	ecord No.		
Basic Record	Full Record	Marc Record			
	1 of 1	A 15 1 H 10	1 3 🗋 XI 🖬 🗉	100%	

However, one can easily switch between 'Basic', 'Full' and 'MARC' view by choosing appropriate tab.



1 of	1 H H	- 0 215		100%		1.0
		Record	d Details (E	lasic)		
ID: 751		-				
Title		The statistic	al methods in e	conomics an	d	View Attachment
		: P Sargant F	lorence			
Author		: Florence . F	Sargant			
Publisher		: London :				
		: Kegan paul,	trench, trubner &	CO.		
		: 1929.				
Edition						
Physical Description		: 467 ;				
		: 22x14cms				
ISBN/ISSN						
Class No		: QA 280				
Subject / Keyw	ord	: Econometrie	CS.			
		: Economics-	Mathematics-T	neory.		
		Mathematic	s-Economics-T	neory.		
		Economics-	Statistics-Theo	y.		
URL						
Note						
Accession No	Status	Class No	Collection Type	Book No	Price	Location
256	Available	QA 280		E2F5	1-0-0	SHML

The "Basic Record" tab will give you brief bibliography of the record, if your record has attachment or URL, you can click on "View Attachment" button to see the attachment or click on URL for direct navigation to specified URL.

Clicking on "Full Record" tab will enable you to see all the fields along with description of the fields as show in screen shot given below.

Publication, Distribution, Etc. (Imprint) (NF	0
Place of publication, distribution, etc. (R)	: London :
Name of publisher, distributor, etc. (R)	: Kegan paul, trench, trubner & co.
Date of publication, distribution, etc. (R)	: 1929
Physical Description (R)	
Extent (R)	: 467.
Dimensions (R)	: 22x14cms.



"MARC Record" tab will enable you to see same record in MARC21 tags.

260		a	: London :
260		b	: Kegan paul.trench.trubner & co.
260		с	: 1929.
300	-	a	: 467 ;
300	_	C	: 22x14cms.

6.2 Boolean Search

A versatile tool in the hands of a professional user, Boolean operators can be placed between commonly used sought fields for searching the resources stocked.

Select Fields		Overy	Select Operator		
Title	v inda		AND	74	
Author	👻 Ghandhiji		OR	8	Search
Publisher	BPB publication		20	4	

Here you can perform search by using three different search terms and two Boolean operators, rest of the functions are same as explained above.

6.3 Advance Boolean Search

OPAC -> Advanced Bo	olean Search				
Select Tag	Select Subteld	Query	Select Operator		
100 Main Entry - Persone 🛩	a Personal name (NR) 🐱	S.R	AND	2	
245 Title Statement (NR) 🗸	a Title (NR)	inda	OR	4	Search
250 Publication, Distribut 👻	b Name of publisher, d 📯	BPB publication	20	*	

Advance Boolean search option enable users to perform search through entire database using any of the MARC21 based tag. The operation in simple, first choose the tag you want to search for, then select the corresponding subfield (of that tag) enter the search term, select boolean operator and perform the search. One can use up to three search criteria and two boolean operators. Rest of the functionalities are same as explained in 'Basic Search'.



6.4 Member OPAC

This option is useful when any library member wants to see his own status. He/she can do so by simply entering his member code/ ID as shown in screen reproduced below.

Sister.	ember Detail	\$										
			h	lember Code	Member ID	189935100	001					_
lemb	er Detail:							_				
Mem	ber Name Y	atrik Patel		Me	mber Code	189935100	001	Current Due	10.000	the		
De	partment U	niveristy Lib	rary/Facult	y	Category	Lib. Techni	cal H	em Issued :	0	1	7	
												24
	es Details											_
		Decem										
	Privileges	Reserve										
	Privileges	Reserve	MaxAllow	Currentissu	MaxReserv	CurrentRes	ReservePer	FinePhase	FinePhase	FinePhase	F	in l
	Privileges	a IssuePeriod	MaxAllow 6	Currentissu 6	MaxReserv 2	CurrentRes 2	ReservePer 15	FinePhase 0	FinePhase 0	FinePhase 0.00	F	
sue	Privileges MediaDesc	a IssuePeriod 365	Contraction of the local distribution of the	A CONTRACTOR	MaxReserv 2 0	CurrentRes 2 0		FinePhase 0 0	FinePhase 0	10000000000000		
sue	Privileges MediaDeso Textual Do	a IssuePeriod 365 0	6	6	2	2	Contractor and a second	0	0	0.00	0.	
sue	Privileges MediaDesc Textual Do Theses	a IssuePeriod 365 0 0	6	6 0	2	2	Contractor and a second	0	0	0.00	0.	
sue	Privileges MediaDeso Textual Do Theses Reports Meeting Do	a IssuePeriod 365 0 0	6 0 0	6 0 0	2 0 0	2 0 0	15 0 0	0 0 0	0 0 0	0.00 0.00 0.00	0.0.0.	

Using this option member can see privileges, item issued/reserved under his/her member card.

APPENDIX

MARC Bibliographic formats are standards for representing and communicating bibliographic and related information in machinereadable form. It is a global standard for 21st Century's library developed in collaboration with Library of Congress, Canadian Library Association and British Library, UK. The complete field-wise detailed description with latest updates on it is available on the website of Library of Congress at http://www.loc.gov/marc/. It has five different formats – Bibliographic, Authority, Holdings, Classification and Community. SOUL 2.0 has adopted to Bibliographic and Authority formats.

A MARC record involves three elements: the record structure, the content designation and the data content of the record. The structure of MARC record is an implementation of format for information Interchange – ISO-2709. Content designation defines the codes and conventions for data elements within a record and to support manipulation of those data. The data content of the most elements are defined outside the formats using AARC2, LCSH, Sears List of Subject Heading, and other classification schemes used by the library.

The organization of the MARC record is based on the record structure of the ISO-2709 exchange format. It is divided in three sections - the leader, the directory, and the variable fields. The leader consists of 24 characters, the directory consists of 12 characters containing the tag, starting position, and length of each field within the record. The directory ends with a hex value 1E representing field terminator and record ends with a hex value 1D representing record terminator. MARC21 distinguishes variable fields with variable fixed fields and variable data fields. SOUL 2.0 provides templates for leader and variable fixed fields (Tag 008), which can be selected from the combo-box. As explained in the manual, pre-defined leader and fixed fields are editable and cataloguers can modify according to item being catalogued. Variable data fields are included in the data entry template of the SOUL 2.0.



The Leader

The leader represents following 24 characters (character positions 00 to 23) of the MARC 21 record. SOUL 2.0 has pre-defined leader for books, theses and serials databases. Apart from these pre-defined leaders, user can also create their own template of the leader for different kind of items. Out of these 24 characters, SOUL 2.0 users need to identify following character positions at the time of modifying the leader:

Record status: character position 05 represents ASCII graphic character which indicates the relation of the record to a file.

Type of Record: character position 06 represents ASCII graphic character which specifies the characteristics and defines the components of the record.

Implementation-defined: character position 07-08 reserve for bibliographic level (character position 07) and type of control (character position 08). Any position not defined contains blank.

Character coding scheme: character position 09 identifies the character coding scheme used in a record. In SOUL 2.0, it should always be a representing UCS/Unicode.

Encoding level: character position 17 identifies the type of data encoding in the record.

Descriptive cataloguing form: character position 18 identifies the cataloguing scheme used for rendering the record. In SOUL 2.0, it should always be a representing AACR-2.

Linked record requirement: character position 19 represents either need of the related record or related record not required.

Fixed Field

SOUL 2.0 has included fixed field 008 for creating MARC 21 records. 008 is fixed field with 40 characters (00 to 39). Out of 40 characters following characters have to be selected from the drop down menu by the cataloguer while either creating new template for the field or editing the pre-defined template of the fixed field. SOUL 2.0 has predefined fixed field 008 for different type of documents and it also



provides option for the user to create their own template. Following are the character positions that need to be looked into at the time creating or modifying:

Type of date/Publication status: character position 06 represents either type of date or publication status.

Illustrations: character positions 18-21 represents illustrations of the items. Cataloguer needs to look at inside of the item for identifying the types of the illustrations such as maps, charts, tables, graph, etc.

Target Audience:character position 22 represents target audience ofthe item such asprimary, adult, general, juvenile, etc.

Form of Item: character position 23 identifies the physical format of the item such as microfilms, microfiche, large print, electronic, etc.

Nature of contents: character position 24-27 represents nature of the contents identifying such as dictionary, encyclopaedia, atlas, handbooks, catalogue, technical report, treaties, etc.

Government publication: character position 28 identifies the item either of govt. publication or not. In case of govt. publication, provides values for different kind of govt. publication such as national/federal, local, international governmental, etc.

Conference publication: character position 29 is for identifying the item either of conference publication or not.

Festschrift: character position 30 represents the value for either festschrift or not a festschrift item.

Index: character position 31 is for either index or not an index item.

Literary form: character position 33 indentifies the literary form of an item such as novel, short stories, drama, essays, poetry, etc.

Biography: character position 34 represents biographical information of an item such as autobiography, individual biography, collective biography, etc.



Default MARC 21 Fields Used in the SOUL 2.0

Apart from the leader and the fixed field 008, SOUL 2.0 uses most of the important fields frequently us ed by the cataloguers. The fields which are included in the default template of SOUL 2.0 are given below. For full listings of all MARC 21 tags, indicators, and subfield codes, see MARC 21 Format for Bibliographic Data at http://www.loc.gov/marc/.

Definition and explanations term frequently used with regards to MARC21 records are as follows:

Tags: The tags (3-digit numbers) are followed by the names of the fields they represent. In this summary, and in the MARC 21 Format for Bibliographic Data, if a tag can appear more than once in one bibliographic record, it is labeled repeatable (R). If it can only be used once, it is labeled non-repeatable (NR). For example, a catalogue record can have several subjects, so the tags for subject added entries (6XX) are labeled repeatable (R).

Indicators: The use of indicators is explained in fields where they are used. Indicators are one-digit numbers. Beginning with the 010 field, in every field -- following the tag -- are two character positions, one for Indicator 1 and one for Indicator 2. The indicators are not actually defined in all fields, however. It is possible that

a 2nd indicator will be used, while the 1st indicator remains undefined (or vice versa). When an indicator is undefined, the character position will be represented by the blank space (in the manual '#' is taken for representing blank space).

Subfield codes: All the data in each field (beginning with the 010 field) is divided into subfields, each of which is preceded by a delimiter subfield code combination. The most common subfield codes used with each tag are shown. Each subfield code is preceded by the character \$, signifying a delimiter. The name of the subfield follows the code.

Examples: Examples follow the explanation for each field. For clarity, one space has been placed between the tag and the first indicator, one space has been placed between the second indicator and the first delimiter- subfield code, and one space has been inserted between the delimiter-subfield code and the subfield data.



020 - International Standard Book Number (ISBN) (R)

Indicators undefined.

Subfields used in SOUL 2.0:

\$a -- International Standard Book Number

Example: 020 ## \$a 0877547637

022 - International Standard Serial Number (ISSN) (R)

Indicator 1: Level of International Interest

#-- No level specified

0--Serial of international interest

1 -- Serial not of international interest

Indicator 2: Undefined

Subfields used in SOUL 2.0:

\$a -- International Standard Serial Number (NR)

Example: 022 0# \$a1560-1560

030 - CODEN Designation (R)

Indicator 1: Undefined

Indicator 2: Undefined

Subfields used in SOUL 2.0:

\$a -- CODEN (NR)

Example: 030 ## \$aJACSAT



041 - Language Code (R)

Indicators not used. Subfields used in SOUL 2.0: \$a -- Language

Example: 041 ## \$a eng

080 Universal Decimal Classification Scheme (R) 082 Dewey Decimal Classification Scheme (R) 084 Other Classification Number (R)

SOUL 2.0 is defined for any kind of the classification scheme. The classification scheme has to be selected by librarian at the time of installing the software. Above three schemes have been configured with the system. Any library who is using other than the UDC (Universal Decimal Classification) and DDC (Dewey Decimal Classification) schemes can use tag 084 (Other Classification Number). The library who is using Colon Classification can also use this system while putting the class number in the tag 084.

Indicators are not used. Subfields used in SOUL 2.0

\$a -- Class number

Example: 080/082/084 ## \$a971.1/.2

100 - Main Entry -- Personal name -- (primary author) (NR)

Indicator 1: Type of personal name entry element

0--Forename

- 1 -- Surname (this is the most common form)
- 3 -- Family name



Indicator 2 undefined.

Indicator 2 became obsolete in 1990. Older records may display 0 or 1 $\,$

Subfields used in SOUL 2.0:

\$a--Personal name

\$d -- Dates associated with a name (generally, year of birth)

\$e--Relator Term

\$q -- Fuller form of name

Example: 100 1# \$a Gregory, Ruth W. \$q (Ruth Wilhelme), \$d 1910-

110 - Main Entry -- Corporate name ®

Indicator 1: Type of corporate name entry element

- 0 -- Inverted name (not used with AACR2)
- 1-- Jurisdiction name
- 2 -- Name in direct order
- Indicator 2: Type of added entry.

See Indicator 2 under 700

-- No information provided

2 -- Analytical entry

Subfields used in SOUL 2.0:

- \$a -- Corporate name or jurisdiction name as entry element
- \$b -- Subordinate unit (R)
- \$c -- Location of meeting (NR)
- **\$d** -- Date of meeting or treaty signing (R)
- \$e -- Relator term (R)
- **\$g** -- Miscellaneous information (NR)
- \$n -- Number of part/section/meeting (R)

Example: 110 2# \$a Sunburst Communications (Firm)



111 - Main Entry-Meeting Name (NR)

Indicator 1: Type of meeting name entry element

0--Inverted name

1--Jurisdiction name

2 -- Name in direct order

Indicator2:Undefined

#-Undefined

Subfields used in SOUL 2.0:

a - Meeting name or jurisdiction name as entry element (NR)

\$c -- Location of meeting (NR)

\$d -- Date of meeting (NR)

\$e -- Subordinate unit (R)

\$f -- Date of a work (NR)

\$n -- Number of part/section/meeting (R)

\$t -- Title of a work (NR)

Example: 111 2# \$aInternational Symposium on Quality Control (1974-)\$n(3rd :\$d1978 :\$cTokyo, Japan)

130 - Main Entry -- Uniform title -- (NR)

Indicator 1: Nonfiling characters

0-9 -- Number of nonfiling characters present (for initial articles, including spaces)

Indicator 2 undefined.

Indicator 2 became obsolete in 1990. (See 100 above.)

Subfields used in SOUL 2.0:



- \$a -- Uniform title
- \$f -- Date of a work
- \$h -- Medium (NR)
- \$k -- Form subheading (R)
- **\$n** -- Number of part/section of a work (R)

Example: 130 0# \$a Bible. \$p O.T. \$p Psalms.

210 - Abbreviated title ®

Indicator 1: Title added entry

0 -- No added entry

1 -- Added entry

Indicator 2: Type of title

- #--Abbreviated key title
- 0 -- Other abbreviated title

Subfield used most often:

\$a -- Abbreviated title (NR)

Example: 210 0# \$aManage. improv. cost reduct. goals

222 - Key title (R)

Indicator 1: Undefined

Indicator 2: Nonfiling characters

0 -- No nonfiling characters

1-9 -- Number of nonfiling characters

Subfield used in SOUL 2.0:



\$a - Key title (NR)

\$b - Qualifying information (NR)

Example: 222 #4 \$aDer Öffentliche Dienst \$b(Köln)

245 - Title Statement (NR)

Indicator 1 : Title added entry

0 - No Title added entry (Indicates a title main entry; i.e. no author is given)

 Title added entry (the proper indicator when an author given in 1XX; the most Common Situation)

Indicator 2 : Nonfiling characters

0-9- Number of nonfiling characters present, including spaces; usually set at zero, except when the title begins with an article; e.g. for the robe, t he second indicator would be set to 4. The letters T, h, e, and the space following them are then ignored in alphabetizing titles. The will be

automatically filed under "r" - for Robe.

Sub-fields used in SOUL 2.0

\$a – Title proper
\$b – Reminder of title (subtitles, etc.)
\$c – Remainder of title page transcription/state of responsibility.

Example: 245 14 \$a The DNA story :\$b a documentary history of gene cloning /\$c James D. Watson, John Tooze.



246 - Varying form of title (R)

Indicator 1: Note/title added entry controller

- 1 -- Note, title added entry
- 3 -- No note, title added entry

Indicator 2+: Type of title

- #-- No information provided
- 0 -- Portion of title
- 1 -- Parallel title
- 4 -- Cover title
- 8 -- Spine title

Subfield used most often:

- \$i -- Display text (NR)
- \$a -- Title proper/short title (NR)
- **\$b** -- Remainder of title (NR)
- \$n -- Number of part/section of a work (R)
- **\$p** -- Name of part/section of a work (R)

Example: 246 1# \$jAlternate Issues Published with Title : \$a Chicago,Daily Teleraph

247 - Former title (R)

Indicator 1: Title added entry

- 0 -- No added entry
- 1 -- Added entry



Indicator 2: Note controller

- 0 -- Display note
- 1 -- Do not display note

Subfield used most often:

- **\$a** -- Title (NR)
- **\$b** -- Remainder of title (NR)
- \$f -- Date or sequential designation (NR)

Example: 247 10 \$aJournalism bulletin \$fMar. 1924-Nov. 1927

250 - Edition statement (NR)

Indicators undefined.

Subfield used in SOUL 2.0:

\$a -- Edition statement

- **\$b** -- Remainder of edition statement (NR)
- Example: 250 ## \$a 6th ed./\$brevised by Dr. M.A.Gopinath

256 - Edition statement (NR)

Indicators undefined.

Subfield used in SOUL 2.0:

\$a -- Computer file characteristics (NR)

Example: 256 ## \$aComputer data (2 files : 876,000, 775,000 records).



260 - Publication, distribution, etc. (Imprint) (R)

Indicator 1: Sequence of publishing statements

#-- No information provided

Indicator 2: Undefined

Subfields used in SOUL 2.0:

\$a -- Place of publication, distribution, etc. (R)

\$b -- Name of publisher, distributor, etc. (R)

\$c -- Date of publication, distribution, etc. (R)

Example: 260 ## \$a New York :\$b Chelsea House,\$c 1986.

300 - Physical description (R)

Indicators undefined.

Subfields used in SOUL 2.0:

\$a -- Extent (number of pages) (R)

\$b -- Other physical details (usually illustration information)

\$c -- Dimensions (cm.) (R)

\$e -- Accompanying material (for example, "teacher's guide" or "manual")

Example: 300 ## \$a 139 p. :\$b ill. ;\$c 24 cm.

310 - Current Publication Frequency (NR)

Indicators undefined.

Subfields used in SOUL 2.0:

\$a -- Current publication frequency (NR)



\$b -- Date of current publication frequency (NR)

Example: 310 ## \$aMonthly, \$bJan. 1984

362 - Dates of Publication and/or Sequential Designation (R)

Indicator 1: Format of date

0 -- Formatted style

1 -- Unformatted note

Indicator 2: Undefined

Subfield used most often:

\$a -- Dates of publication and/or sequential designation (NR)

Example: 362 0# \$aVol. 1, no. 1 (Apr. 1983)-v. 1, no. 3 (June 1983)

490 - Series statement (No added entry is traced from field) (R)

Indicator 1: Specifies whether series is traced (whether an 8XX tag is also present, tracing the series differently)

0 -- Series not traced

1 -- Series traced differently (8XX is in record)

Indicator 2 undefined.

Subfield used in SOUL 2.0:

\$a -- Series statement

\$v -- Volume number

\$x -- International Standard Serial Number

Example: 490 1# \$a Colonial American craftsmen



500 - General note (R)

Indicators undefined.

Subfield used in SOUL 2.0:

\$a -- General note (Used when no specialized note field has been defined for the information. Examples: Notes regarding the index; the source of the title; variations in title; descriptions of the nature, form, or scope of the item.)

Example: 500 ## \$a Includes index.

501 - With Note (R)

Indicators are undefined

Subfield used in SOUL 2.0

\$a -- With note

Example: 501 ## \$a With: The reformed school / John Dury. London : Printed for R. Wasnothe, [1850]

502 - Dissertation Note (R)

This field is used for theses database for rendering of thesis records.

Indicators are undefined

Subfield used in SOUL 2.0

\$a -- Dissertation note

Example: 502 ## \$a Thesis (Ph.D.) –Ravishankar University, Raipur, 1986.



504 - Bibliography, etc. note (R)

Indicators undefined.

Subfield used in SOUL 2.0:

\$a -- Bibliography, etc. note

Example: 504 ## \$a Includes bibliographical references.

505 - Formatted contents note (R)

Indicator 1: Type of contents note

0 -- Complete contents

- 1 -- Incomplete contents (used with multivolume set when some volumes are not yet published)
- 2 -- Partial contents

Indicator 2: Level of content designation

#--Basic

Subfield used in SOUL 2.0:

\$a -- Formatted contents note

Example: 505 0# \$a Pride and prejudice – Emma – Northanger Abbey

510 - Citation/References Note (R)

Indicator 1: Coverage/location in source

- 0 Coverage unknown
- 1 Coverage complete
- 2 Coverage is selective



- 3 Location in source not given
- 4 Location in source given

Indicator 2: undefined (SOUL 2.0 defines it internally in system)

Subfields used in SOUL 2.0:

- \$a -- Name of source
- \$b -- Coverage of source
- \$c -- Location within source
- \$x --- International Standard Serial Number

Example: 510 1# \$alndex Medicus, \$x0019-3879, \$bv1n1, 1984-

520 - Summary, etc. note (R)

Indicator 1: Display constant controller

- #--Summary
- 1 -- Review
- 2 -- Scope and content
- 3--Abstract

Indicator 2 undefined

Subfields used in SOUL 2.0:

\$a -- Summary, abstract, or annotation

\$b -- Expansion of summary note

Example: 520 ## \$aThis basic guide to parliamentary procedure tells how to conduct and participate in a meeting properly.



525 - Supplement Note (R)

Indicators undefined.

Subfield used in SOUL 2.0:

\$a -- Supplement note

Example: 525 ## \$aSupplements accompany some issues.

546 - Language Note (R)

Indicators undefined.

Subfield used in SOUL 2.0:

\$a -- Language note

Example: 546 ## \$aln Hungarian; summaries in French, German, or Russian.

600 - Subject added entry -- Personal name (R)

Indicator 1: Type of personal name entry element

- 0 -- Forename
- 1 -- Surname (this is the most common form)
- 3 -- Family name

Indicator 2: Subject heading system/thesaurus (identifies the specific list or file which was used)

- 0 -- Library of Congress Subject Headings
- 1 -- LC subject headings for children's literature
- 2 -- Medical Subject Headings
- 3 -- National Agricultural Library subject authority file



- 4 -- Source not specified
- 5 -- Canadian Subject Headings
- 6 -- Répertoire de vedettes-matière

(Note regarding Sear's List of subject headings: The MARC 21 format does not provide an assigned indicator. Therefore, an indicator of 4 is used.)

Subfields used in SOUL 2.0:

- **\$a** -- Personal name (surname and forename)
- \$d -- Dates associated with a name
- \$e -- Relator term
- \$q -- Fuller form of name

Example: 600 10 \$a Shakespeare, William, \$d 1564-1616

610 - Subject added entry -- Corporate name (R)

Indicator 1: Type of corporate name entry element

- 0 -- Inverted name (not used with AACR2)
- 1 -- Jurisdiction name
- 2 -- Name in direct order
- Indicator 2: Subject heading system/thesaurus.

See indicator 2 under 600

Subfields used in SOUL 2.0:

\$a -- Corporate name or jurisdiction name as entry element



- \$b -- Subordinate unit
- \$c -- Location of meeting
- \$d -- Date of meeting or treaty signing
- \$e -- Relator term
- \$n -- Number of part/section/meeting
- \$g -- Miscellaneous information

Example: 610 10 \$a United States. \$b Army Air Forces

611 - Subject Added Entry-Meeting Name (R)

Indicator 1: Type of meeting name entry element

- 0 -- Inverted name
- 1 -- Jurisdiction name
- 2 -- Name in direct order
- Indicator 2: Thesaurus

See Indicator 2 of 600

Subfields used in SOUL 2.0:

\$a -- Meeting name or jurisdiction name as entry element (NR)

- \$c -- Location of meeting (NR)
- \$d -- Date of meeting (NR)
- **\$e** -- Subordinate unit (R)
- **\$f** -- Date of a work (NR)
- \$n -- Number of part/section/meeting (R)
- **\$t** -- Title of a work (NR)

Example: 611 20\$aVatican Council\$n(2nd :\$d1962-1965). \$tDecretumde presbyterorum ministerio et vita



630 - Subject Added Entry-Uniform Title (R)

Indicator 1:Nonfiling characters

0-9 - Number of nonfiling characters

Indicator 2: Thesaurus

See Indicator 2 of 600.

Subfields used in SOUL 2.0:

\$a -- Uniform title

\$f -- Date of a work

\$h -- Medium

\$k -- Form subheading

\$n -- Number of part/section of a work

Example: 630 00 \$aBible.\$kManuscripts.

648 - Subject Added Entry-Chronological Term (R)

Indicator 1:undefined (SOUL 2.0 defines it internally in system)

Indicator 2: Thesaurus

See Indicator 2 of 600.

Subfields used in SOUL 2.0:

\$a – Chronological term

\$v -- Form subdivision (R)

\$x -- General subdivision (R)

\$y -- Chronological subdivision (R)

\$z -- Geographic subdivision (R)

Example: 648 00 \$a1900-1999.



650 - Subject added entry -- Topical term (R)

Indicator 1: Level of subject

- #-- No information provided
- 0 -- No level specified
- 1 -- Primary
- 2 -- Secondary

Indicator 2: Subject heading system/thesaurus

See Indicator 2 of 600.

Subfields used in SOUL 2.0:

- \$a -- Topical term or geographic name entry element
- \$b -- Topical term following geographic name entry element
- \$c -- Location of event
- **\$v** -- Form subdivision (R)
- **\$x** -- General subdivision (R)
- **\$y** -- Chronological subdivision (R)
- **\$z** -- Geographic subdivision (R)

Example: 650 #0 \$a Theater \$z United States \$v Biography \$v Dictionaries.

Notice that subfields \$v, \$x, and \$z in the 650 field are repeatable. Subfields \$v, \$x, \$y, and \$z do not have to be in alphabetical order. They will be in the order prescribed by the subject heading scheme being used.



651 - Subject added entry -- Geographic name (R)

Indicator 1: undefined. (SOUL 2.0 defines it internally in system)

Indicator 2: Subject heading system/thesaurus.

See indicator 2 under 600

Subfields used in SOUL 2.0:

- \$a -- Geographic name
- **\$v** -- Form subdivision (R)
- \$x -- General subdivision (R)
- \$y -- Chronological subdivision (R)
- \$z -- Geographic subdivision (R)

Example: 651 #0 \$a United States \$x History \$v Chronology.

Notice that subfields \$v, \$x, and \$z in the 651 field are repeatable. Subfields \$v, \$x, \$y, and \$z do not have to be in alphabetical order. They will be in the order prescribed by the subject heading scheme being used.

653 - Index Term-Uncontrolled (R)

Indicator 1:Level of index term

- #-No information provided
- 0 No level specified
- 1 Primary
- 2-Secondary

Indicator 2: not defined in SOUL2.0.

Subfields used in SOUL 2.0:

\$a -- Uncontrolled term (R)

Example: 653 ## \$a India \$a History.



654 - Subject Added Entry-Faceted Topical Terms (R)

Indicator 1: Level of subject

- #-No information provided
- 0 No level specified
- 1 Primary
- 2 Secondary

Indicator 2: undefined. (SOUL 2.0 defines it internally in system)

Subfields used in SOUL 2.0:

- **\$a** -- Focus term (R)
- **\$b**-Non-focus term(R)
- **\$c** -- Facet/hierarchy designation (R)
- **\$v** -- Form subdivision (R)
- **\$y** -- Chronological subdivision (R)
- **\$z** -- Geographic subdivision (R)

Example: 654 0# \$cr\$alandscape gardens\$cy\$b18thcentury\$ cz\$bEngland.

700 - Added entry -- Personal name (R)

Indicator 1: Type of personal name entry element

- 0 -- Forename
- 1 -- Surname (this is the most common form)
- 3 -- Family name

Indicator 2: Type of added entry



-- No information provided (most common; co-authors, editors, etc.)

2 -- Analytical entry (The values for Indicator 2 changed in 1994 with Format Integration, and older records may display additional values. An analytical entry involves an author/title of an item contained in a work.)

Subfields used in SOUL 2.0:

- \$a -- Personal name
- \$q -- Fuller form of name
- \$d -- Dates associated with a name (generally, year of birth)
- **\$e** -- Relator term (such as ill.) (R)

Example: 700 1# \$a Baldridge, Letitia.

710 - Added entry -- Corporate name (R)

Indicator 1: Type of corporate name entry element

- 0 --- Inverted name (not used with AACR2)
- 1 -- Jurisdiction name
- 2 -- Name in direct order

Indicator 2: Type of added entry.

- See Indicator 2 under 700
 - #--No information provided
 - 2 -- Analytical entry

Subfields used in SOUL 2.0:

- \$a -- Corporate name or jurisdiction name as entry element
- **\$b** -- Subordinate unit (R)



- **\$c** -- Location of meeting (NR)
- \$d -- Date of meeting or treaty signing (R)
- **\$e** -- Relator term (R)
- **\$g** -- Miscellaneous information (NR)
- **\$n** -- Number of part/section/meeting (R)

Example: 710 2# \$a Indian Institute of Technology \$bMumbai

711 - Added Entry -- Meeting Name (R)

Indicator 1: Type of meeting name entry element

- 0 -- Inverted name
- 1 -- Jurisdiction name
- 2 -- Name in direct order
- Indicator 2: Type of added entry
 - # No information provided
 - 2-Analytical entry
- Subfields used in SOUL 2.0:

 - \$c -- Location of meeting (NR)
 - \$d -- Date of meeting (NR)
 - **\$e** -- Subordinate unit (R)
 - **\$f** -- Date of a work (NR)
 - \$n -- Number of part/section/meeting (R)
 - **\$t** -- Title of a work (NR)

Example: 711 2# \$aInternational CALIBER 2009\$n(7th : \$d25th to27thFebruary 2009\$cPondicherry University, Puducherry)



730 - Added Entry -- Uniform Title (R)

Indicator 1: Non-filling characters

0-9 - Number of nonfiling characters

Indicator 2: Type of added entry

#-No information provided

2-Analytical entry

Subfields used in SOUL 2.0:

\$a -- Uniform title

\$f -- Date of a work

\$h -- Medium (NR)

\$k -- Form subheading (R)

\$n -- Number of part/section of a work (R)

Example: 730 0# \$aGandhi. \$hMotion Picture

773 - Host Item Entry (R)

Indicator 1: Note controller

0 -- Display note

1 -- Do not display note

Indicator 2: Display constant controller

#-- In

8 -- No display constant generated

Subfields used in SOUL 2.0:



- **\$a** Main entry heading (NR)
- **\$b** Edition (NR)
- \$d Place, publisher and date of publication (NR)
- \$g Relationship information (R)\$h Physical description (NR)
- \$s Uniform title (NR)
- **\$t**-Title (NR)
- **\$w** Record control number (R)
- \$x International Standard Serial Number (NR)

\$y-CODEN Designation (NR)

Example: 773 0# \$aHamilton, Milton W. (Milton Wheaton), 1901-\$tSir William Johnson and the Indians of New York.\$d[Albany] : University of the State of New York, State Education Dept., Office of State History, 1967\$w(DLC)###68066801# [Host item identified by author, title, and record number.]

850 - Holding Institution (R)

Indicators undefined:

Subfields used in SOUL 2.0:

\$a – Holding institution (R)

Example: 850 ## \$aAAP\$aCU



856 - Electronic Location and Access (R)

Indicator 1: Access method

- #-No information provided
- 0 Email
- 1-FTP
- 2 Remote login (Telnet)
- 3 Dial-up
- Indicator 2: Relationship
 - #-No information provided
 - 0 Resource
 - 1 Version of resource
 - 2 Related resource
 - 8 No display constant generated
- Subfields used in SOUL 2.0:
 - \$u Uniform Resource Identifier (R)

Example: 856 0# \$u ttp://www.inflibnet.ac.in/publication/

852 - Location (R)

Indicator 1: Shelving scheme

- #-No information provided
- 0 Library of Congress classification
- 1 Dewey Decimal classification
- 2 National Library of Medicine classification
- 3 Superintendent of Documents classification
- 4 Shelving control number



- 5 Title
- 6 Shelved separately
- 8 Other scheme

Indicator 2: Shelving order

- #-No information provided
- 0 Not enumeration
- 1 Primary enumeration
- 2-Alternative enumeration

Subfields used in SOUL 2.0:

- **\$p** -- Piece Designation
- \$a -- Location
- \$b -- Collection Type
- \$c -- Shelving location
- \$f -- Coded location qualifier
- \$k -- Call number prefix
- \$m -- Call number suffix
- \$t -- Copy number

Following local information have been added in the Location field (852)

Material Type, Status of the item, Department, Budget, Price, Supplier, Invoice Number, Invoice Date, Date of Acquisition.

Example: 852 0# \$p T101\$bText book\$k001.89\$mTEL/RCH\$f Main Library\$aStack Room\$cGround Floor



Keyword Index

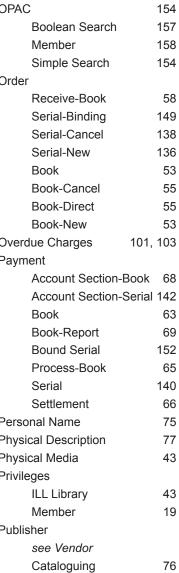
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