DataLNX for Instructional Resource Centers

Basic User Guide

Part One: "Getting Started"

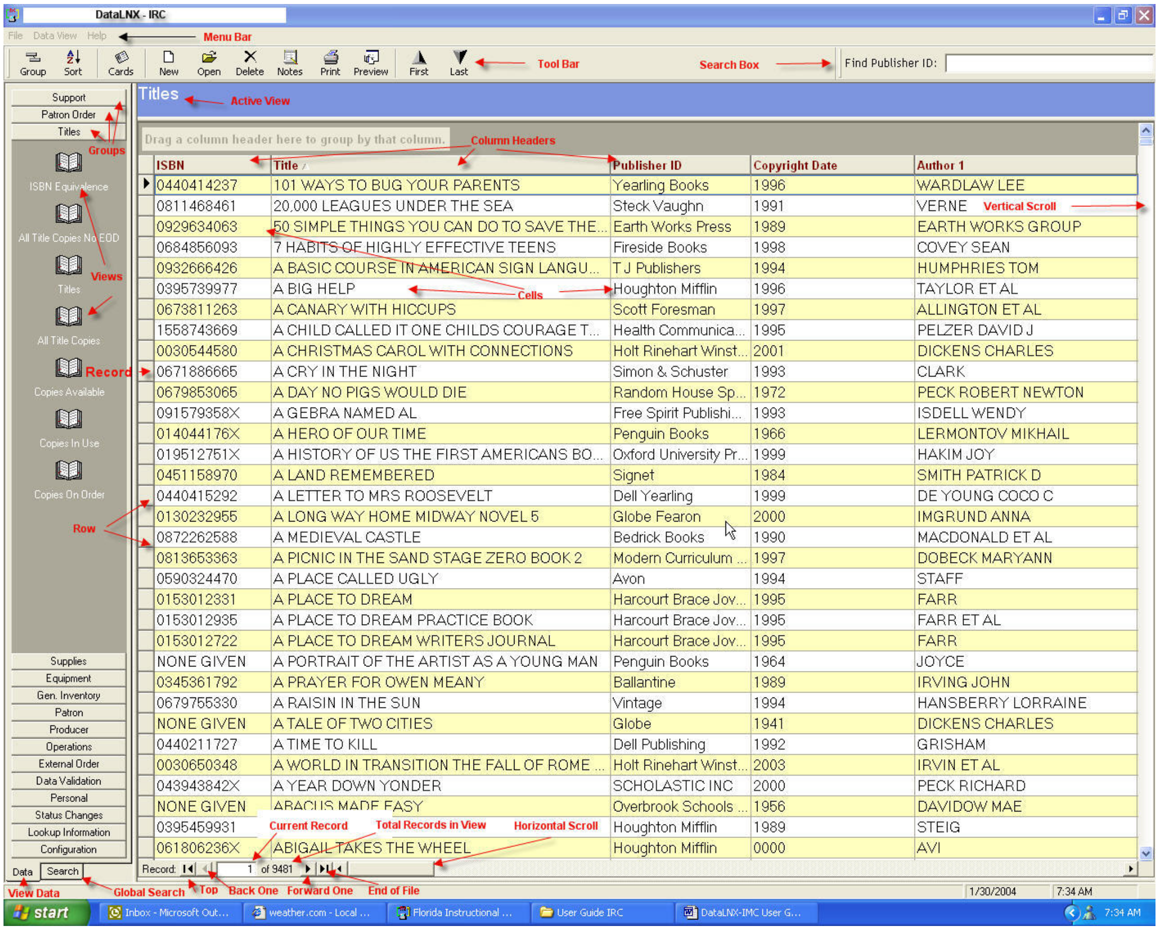
SyLNX, Incorporated

Version 2.01
January 2004

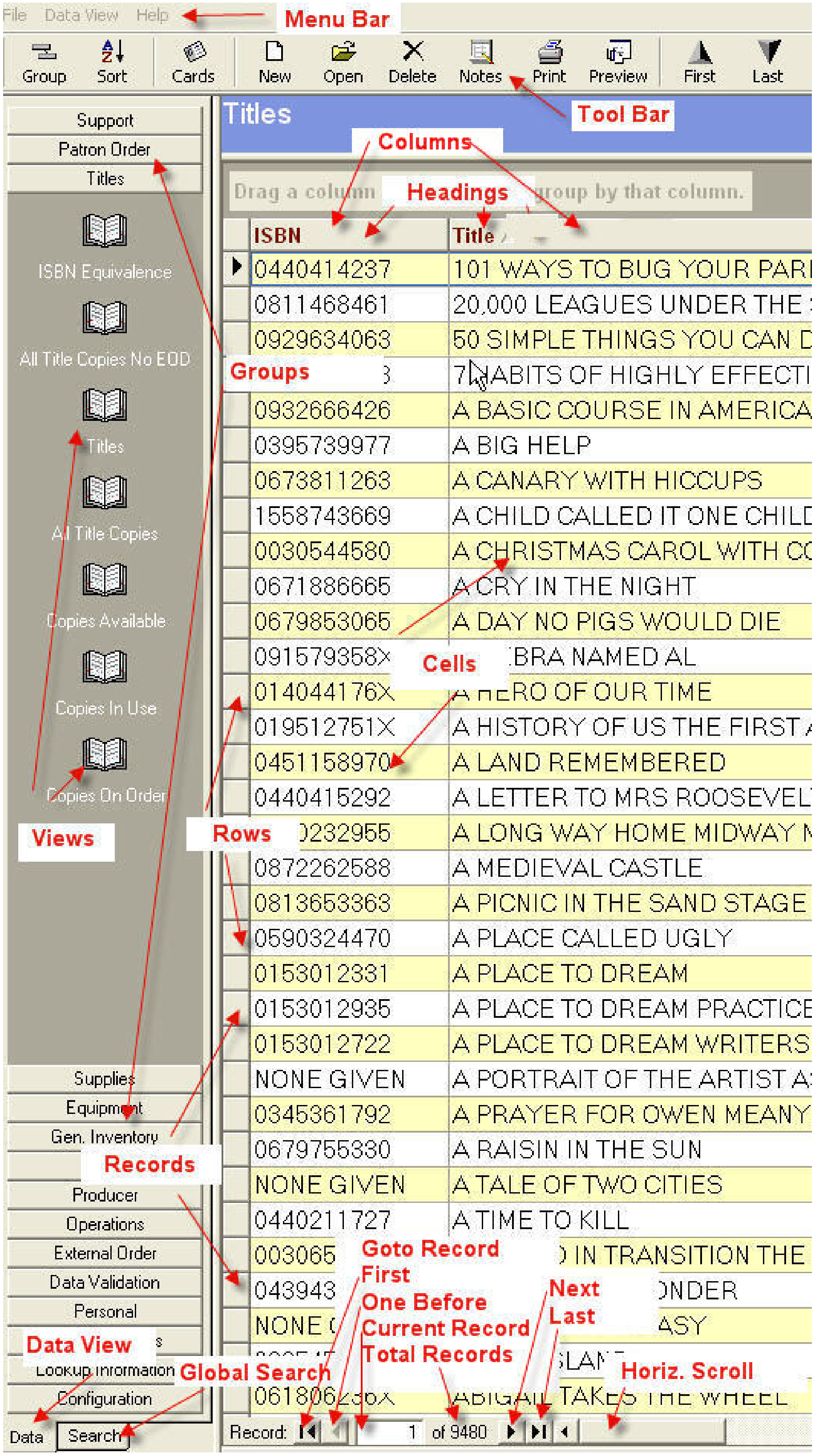
Section I. Basic Orientation to the Views

A. Views

After starting DataLNX, you will be directed to the "Opening Screen". Clicking any group below "Support" will take you to a "Views" screen as shown below.



B. A Closer Look



C. Definitions of Terminology in "Views"

1. "Grid" – The complete array of data represented by "Columns" and "Rows". "Groups" – Major operational categories under which specific "Views" are categorized.

2. "Views" – Collections of data from various tables and files within the database displayed in a single "View". Most of the time the entire "View" can not be displayed due to space restrictions, but "View" encompasses all data both on and off of the screen.

3. "Field(s)" – A container to hold information such as "Title", "Author", etc.

4. "Column(s)" – Contains all of the data related to a "Field" "Header" for all records in the current "View".

5. "Heading(s)" or "Header(s)" – Provide a name or a "Field" name for the "Column" data that appear below it.

6. "Row(s)" – Contain all of the data related to a single record consisting of all "Fields" in the current "View".

7. "Cells" – The intersection of a "Column" and "Row".

8. "Record(s)" – Represented by a "Row" and is a collection of all data for one or more entities.

D. Additional Functions in "Views"

(lower part of screen in diagram)

1. "Data View Button"– Positions the user in the "Grid".

2. "Search" – A global search function for the entire database. For example, entering "Smith" should return all occurrences of "Smith" whether in "Titles", "Students", etc.

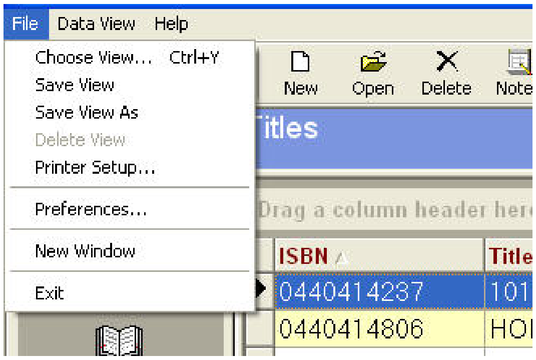
3. "Goto Record" – Navigation tools for the "Grid" includes:
    a. "First" – takes the user to the first record in the current view.
    b. "One Before" – takes the user to the record before the one currently highlighted.
    c. "Next" – takes the user to the record after the one currently highlighted.
    d. "Last" – takes the user to the last record in the current view.

4. "Scroll Bar(s)" – If there are more data in a "View" than can be displayed on your screen, a "Scroll Bar" will display at the bottom (for "Columns") and the right side (for "Rows") of the screen. These "Scroll Bars" may be moved by placing the cursor over the bar, holding the left mouse button, and moving the mouse in the appropriate direction. Also, each bar will have an arrow at either end to move the data in the respective direction by placing the cursor on the arrow and clicking the left mouse button.

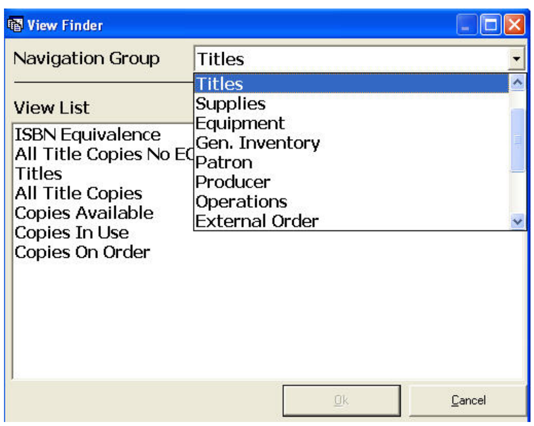
E. The "Menu Bar" in "Views"

The "Menu Bar" has three choices:

1. Choices on the "File" menu:



a. "Choose View" – For non-mouse users such as with "Jaws".

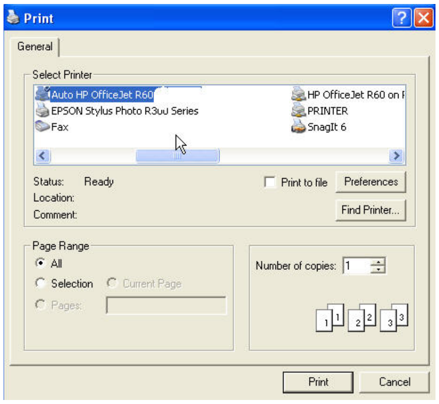


b. "Save View" – <u>Do not use this function EVER</u>.

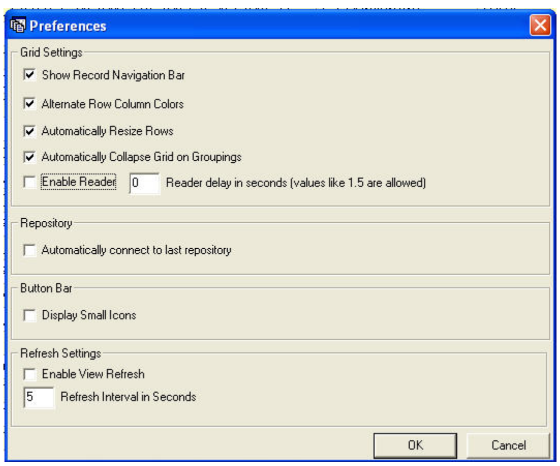
c. "Save View As" – used to create "Personal Views" (see "Personal Views".

d. "Delete View" – Do not use this function unless you are in a "Personal View". Used to delete "Personal Views" only (see "Personal Views".

e. “Printer Setup” – Dialog box for setting up the printer.



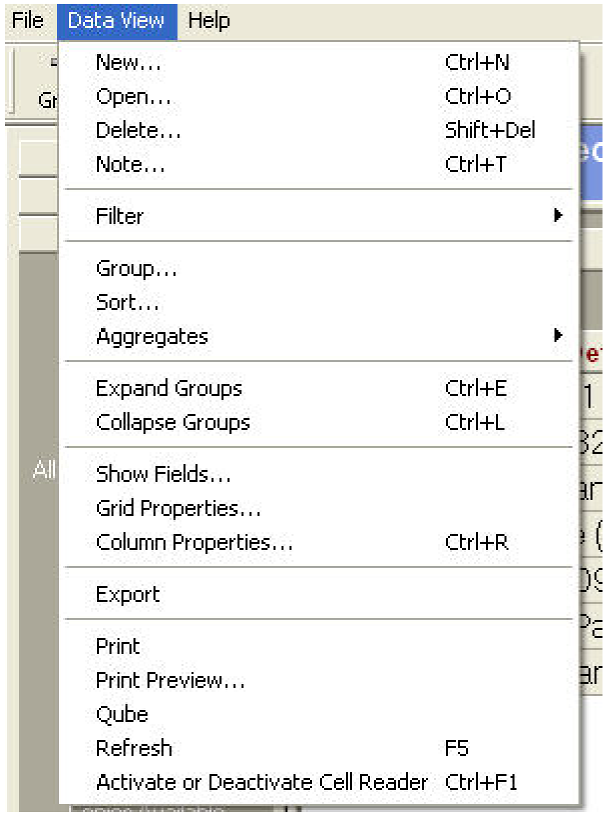
f. “Preferences” – Used to adjust settings in the “Grid”; connect to another database automatically; change the size of “View” icons; and to set the screen “Refresh” on or off and the rate.



g. “Data View” – Used to connect to another database.

h. “Help” – Configuration settings and About. Do not use.

2. Choices on the “Data View” menu:

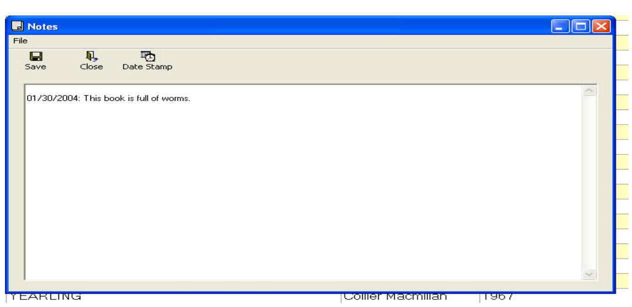


a. “New, Ctrl+N” – Creates a new blank record for the current “View”.

b. “Open, Ctrl+O” – Opens a form in the current “View” for the record highlighted.

c. “Delete, Shift+Delete” – Deletes the current record highlighted. Do not use!

d. “Note, Ctrl+T” – Creates a “Note” that will append to the current record highlighted. “Date Stamp” may be chosen to automatically enter today’s date.



e. “Filter” – Filters data from the current “View” (see “Filtering”).

f. “Group” – Groups data by “Column Header” up to four levels (see “Grouping”).

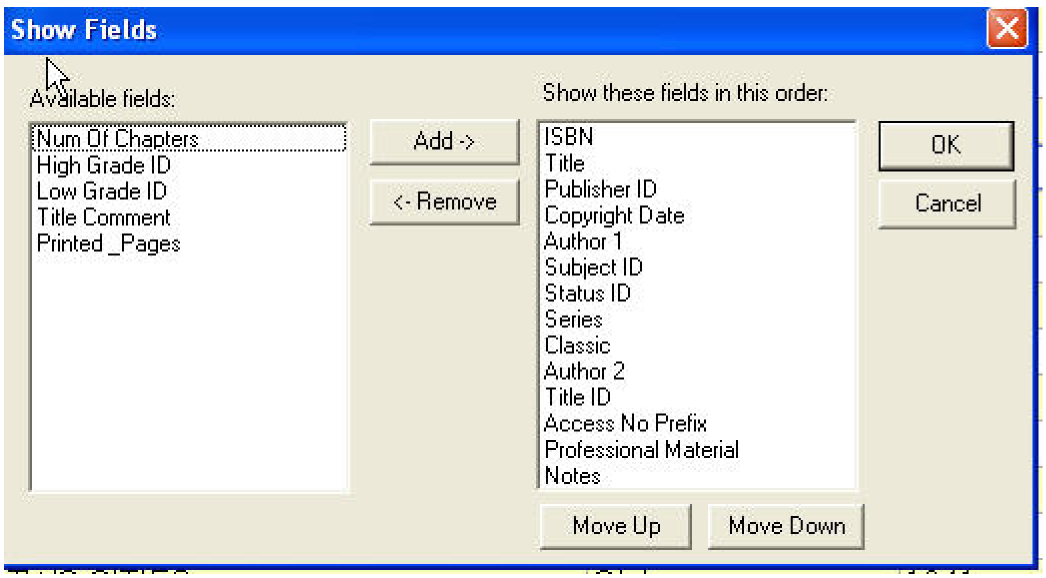
g. “Sort” – Sorts data by “Column Header” up to four levels (see “Sorting”)

h. “Aggregates” – Provides grouping, counting, averaging or summing for “Columnar” data. Works with “Column Properties” (see “Aggregates”).

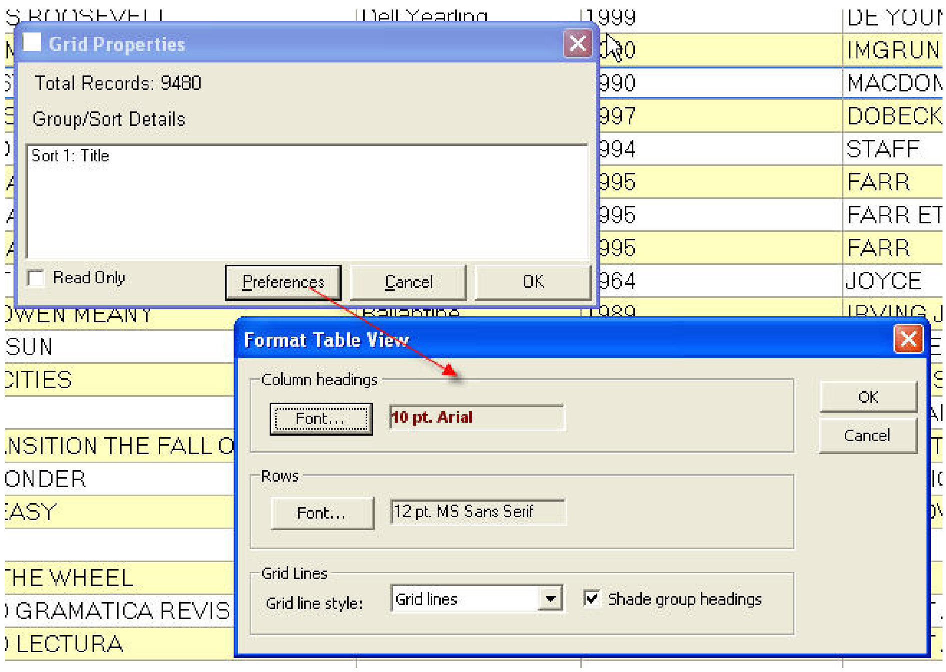
i. “Expand Groups Ctrl+E” – Used with “Groups” to display the data details.

j. “Collapse Grops Ctrl+L” – Used with “Groups” to hide the data details.

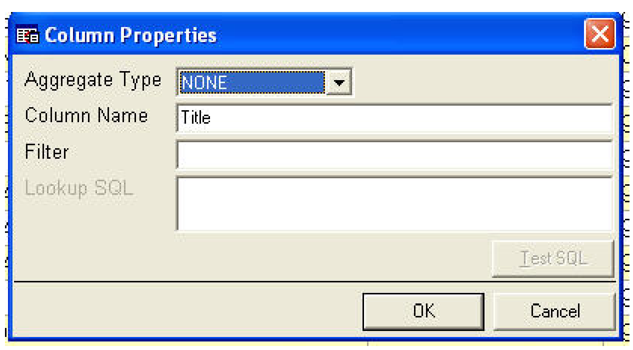
k. “Show Fields” – Used to customized the current “View” and save “Personal Views”. Fields may be added or removed as well as moved up or down. Those moved up appear as a more “left” column and those moved down appear as a more “right” column.



l. “Grid Properties” – Allows the user to change the appearance of the views. Provides the user with a summary of sorts and filters currently being applied. Also, by clicking “Preferences” permits the user to change the appearance of all views (fonts, sizes, etc.). Click “Column headings” or “Rows” to select font, style, size and color. “Grid Lines” may be turned on or off as well as alternate “Shading” of ”Rows”. “Preferences” acts globally across all views for the logged in user only.



m. "Column Properties, Ctrl+R" – Allows user to set "Aggregates" (group, count, average, and sum) for a column. Average and sum are only used for numeric data (see "Aggregates").



n. "Export" – Sends the contents of the current view to Microsoft Excel. The resulting spreadsheet must be saved as an Excel Workbook. Exports of large sets of data may be unsuccessful if your computer memory is low.

o. "Print" – Will attempt to send to the printer the contents of the current view. <u>If the view is large, the result will not be useable</u>. It is advised that the data be delimited first and then viewed in "Print Preview" and close attention paid to the number of pages to be printed.

p. "Print Preview" – Allows the user to see what the print output will look like without actually sending it to the printer. If the output looks acceptable, the print job may be initiated from "Print Preview".

q. "Qube" – This starts another program that permits the user to create "pivot" views of the data extracted from specific SQL views in the database (see "Qube"). This is for advanced users only.

r. “Refresh, F5” – DataLNX displays the data that were current when the “View” was started by the user. If user “1” changes a record, the “View” is automatically refreshed for User “1”. However, if user “2” makes a change, it is only shown to user “2” and not user “1”. By selecting “Refresh F5”, DataLNX retrieves all current data. Settings for “Refresh” may be made to make the process automatic every x number of seconds (see in this Section File f. “Preferences”). Setting automatic “Refresh” at too short an interval may slow down your computer.

s. “Activate or Deactivate Cell Reader, Ctrl+F1” – Turns on or off the cell reader function for “Jaws” or other screen reader devices.

3. Choices on the “Help” menu: At this time the “Help” menu only provides for advanced administrative functions and an “About” statement for the application. This manual will be appended in the near future.

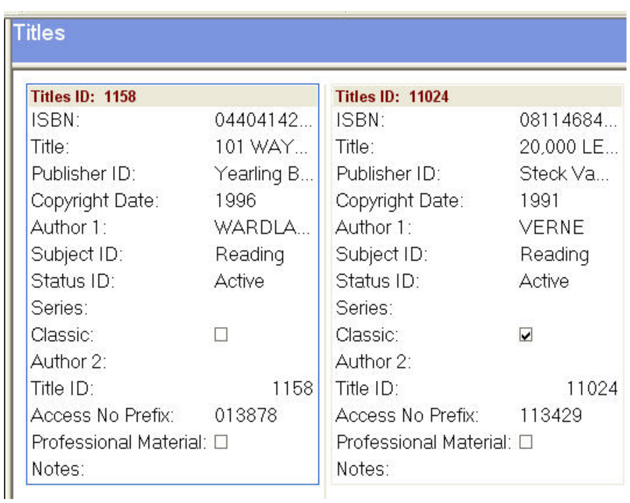
F. The “Tool Bar” in “Views”

The “Tool Bar” has twelve choices that essentially are short cuts for some of the more often used functions on the “Menu Bar”. For full functionality of these shortcuts, see Orientation to the “Menu Bar”.

1. “Group” – Performs the same function as “Group” on the “Menu Bar”.

2. “Sort” – Performs the same function as “Sort” on the “Menu Bar”.

3. “Cards” – Allows the user to switch between the “Grid View” and the “Card View”. The “Card View” appears as below:



4. “New” – Creates a new record in the current “View”.

5. “Open” – Opens the form for the record highlighted in the current “View”.

6. “Delete” – Deletes the record highlighted in the current “View”. Never use this without permission.

7. “Notes” – Opens a “Note” to be appended to the currently highlighted record.

8. “Print” – Starts the print dialog. Take caution and always use “Print Preview” first carefully noting the number of pages in the print job.

9. “Preview” – Provides the user with an on-screen preview of the print job before actually printing.

10. “First” – Moves to and highlights the first record in the current “View”.

11. “Last” – Moves to and highlights the last record in the current “View”.

12. “Find” – This function provides the user the ability to find any record in the current “View” by entering the value and pressing <enter>. To use “Find” follow these instructions:
    a. Locate the “Column Heading” that contains the value you want to find.
    b. Click any cell under that “Column Heading”. The text in front of the find box will now be preceded with the name of the “Column Heading” you selected.
    c. In the “Find” box type exactly what you are looking for and press <enter>. If you have asked for a unique “Find”, the row where it appears is highlighted. If you asked for a non-unique “Find”, the row where the first occurrence of the “Find” will be highlighted. For example, a unique “Find” would be an ISBN number since there should only be one for each record. A non-unique “Find” would be a publisher like Steck Vaughn since this appears in many records.
    d. A very special note about DataLNX-IRC. When looking for an “Access Number” you must format the entry in the “Find” box with spaces in certain places such as 123456 00 0001 exactly as it is formatted in the view. Otherwise is won’t be found.

Section II. Analyzing and Auditing Data

A. Analyzing Data by "Grouping", "Filtering", and "Aggregating"

DATALNX incorporates three techniques to examine data in the Grid: (1) Grouping allows the user to view data grouped by up to four "Column" headings; (2) "Filtering" allows the user to filter data within columns to view only those rows containing the desired data; and, (3) *Aggregating* provides the ability to group, count, average, or sum data in multiple columns.

Before using these features, it is important to consider the three types of data that you might encounter in the Grid Columns.

1. Columns containing *Text* are those containing words, names, addresses, and categories. Mathematical functions such as addition and subtraction cannot be performed on *Text.*

2. Columns containing *Numbers* are those containing amounts, dollars, etc. and you can perform mathematical functions on the data (such as add, subtract, etc).

3. Columns containing *Dates* are in the month, day, and year format in DATALNX.

B. Grouping

Why use Grouping?

Grouping collects the data belonging to each of the values in a selected column and displays that data as a group. This feature makes it easy to see those members of the data set that meet your defined criteria. The column should contain data that is classified in some way. Grouping will not be useful if no two data items in the column are the same or if they are all the same.)

How to use Grouping:

1. Determine the column in which the data appears that you want to group by.

2. Move the mouse pointer to the column header you want.

3. Press the left mouse button and, while holding it down, drag the header up. As soon as it leaves its position, you will see two red arrows to the left. Drag the column header to the red arrows.

4. Data is now grouped by the unique data in the column you used.

5. You may now click and drag another column header up to join the first. Again, the red arrows show where to move the header.

6. Up to four headers may be used for grouping.

7. You may click and drag the headers being used for grouping to new positions relative to each other for different grouping views.

8. To **Collapse Groups** or **Expand Groups** click **Data View** on the **Tool Bar** and click your choice. An alternate way to do this is Ctrl+L for **Collapse Groups** and Ctrl+E for **Expand Groups**.

9. To remove (clear) the grouping view, drag each column header back to its original position. You don't need to take the header back to its exact position, as anywhere in the general header area is fine.

10. Another way to group is to choose Group from the **Tool Bar**. A dialog box will appear and you may select (using the arrows) which column to Group first, second, third, and fourth. You may also choose whether you wish to have the Groups **Expanded** (see all detail) or **Collapsed** (see only the categories). Click OK when you have finished and the grouping will appear.

C. Filtering

Why use Filtering?

Filtering allows you to select certain data in columns while not displaying the records that are of no interest. You may filter out data in up to four columns before it is necessary to clear the filter and start again.

How to use Filtering*:*

1. To filter you must locate the column in which the data exists that you want to see after filtering. <u>Each column may be filtered only once each session.</u>

2. Place the mouse pointer on the cell that contains the value you want to use when filtering and then left click.

3. Right click and a menu will appear. You may substitute this right click by going to the **Menu Bar**, selecting **Data View.** This will provide you with the same menu as the right click.

4. <u>For Numeric Data Only</u>: Select **Filter** from the menu and a new box will appear. You may choose any one of the five selections from **Equal to Selection** through **Less than or equal to selection**. **Note:** These statements **Equal to…** , **Less than or equal to…** are relative to the number you originally left clicked on in the column.

5. <u>For Text Data Only</u>: Select **Filter** from the menu and a new box will appear. You may choose only **Equal to Selection** for Text Data.

6. <u>For Date Data Only:</u> Select **Filter** from the menu and a new box will appear. You may choose only **Date** and another box will appear with two choices: **Filter Equal to Year** and **Filter Equal to Month.** Choosing the first will return all records in the column with the same year as the cell you originally left clicked and choosing the second will return all records with the same month as the cell you originally left clicked. You may not select both or one and then the other.

7. If you are satisfied with the results, you may move to other functions now including grouping, aggregates, or you may filter another column. <u>You may not filter any column more than once per session.</u>

8. If you are not satisfied with the results, repeat steps 2, 3, and 4 except in step 4 choose **Clear** from the **Filter Menu.** At this point you may try filtering again.

9. It is always a good idea to **Clear** filters after you are through with them.

D. Aggregating

Why use Aggregates?

Aggregating provides you with a summary report of data using the functions **None**, **Group**, **Count**, **Average**, or **Sum. None** provides no function and is used to reset the function. **Group** assembles categories in an order and is always used with **Count**, **Average**, or **Sum** to return numeric data. **Count** returns a numeric count of each unique value in the column selected and may be used with text, numeric, or date data. **Average** returns an arithmetic average of numeric data found in the column selected. **Sum** adds numeric data found in the column and returns the sum value. **Average** and **Sum** may only be used with numeric data not text or dates.

An important note about **Group -** This function is used when there is a logical subgroup or subgroups to the data you are grouping. The subgroup(s) will be assigned the aggregate function of **Count**, **Average**, or **Sum**. For example, if you want to find out how many Operators were male or female within each race category, first you would Group by race, and then count by gender. This would return so many males and females for each of the race categories.

How to use Aggregates:

1. To Aggregate you must locate the column in which the data exists that you want to see after aggregating.

2. Place the mouse pointer on the column that contains the values you want to use when aggregating and then left click.

3. Right click and a menu will appear. You may substitute this right click by going to the **Menu Bar**, selecting **Data View.** This will provide you with the same menu as the right click.

4. Select **Column Properties** (do not select **Aggregates** at this time) and look for the box in that dialog named Aggregate Type. By left clicking the arrow in that box, the selections will be presented. Left click on the one you want.

5. You may aggregate now, but if you first selected **Group** for your first column, you now want to select another column to **Count**, **Average**, or **Sum.** Repeat item 4 to do this. If your second column is text or date select **Count.** If it is numeric, you may select **Average** or **Sum**.

6. Right click and a menu will appear. Click on **Aggregates** and then **Show Values**. The table of aggregates you defined will appear.
7. You may export to Excel from the **Data View** menu if you wish to further refine, chart, and print the table.

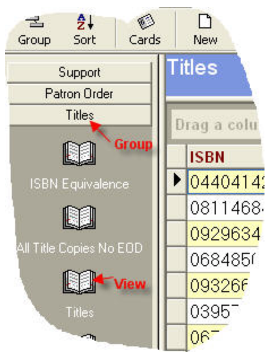
8. When you are finished using the aggregate table go to the **Data View** on the **Menu Bar** and left click **Aggregates** and then **Clear**. This action clears the aggregate table and returns you to the Grid.

Section III. Startup Data Entry Basics Step-by-Step

A. Entering Titles

(Given: no title record exists for this book)

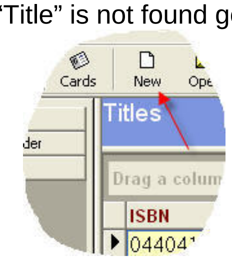
1. Go to group “Titles” and then choose the view “Titles”.



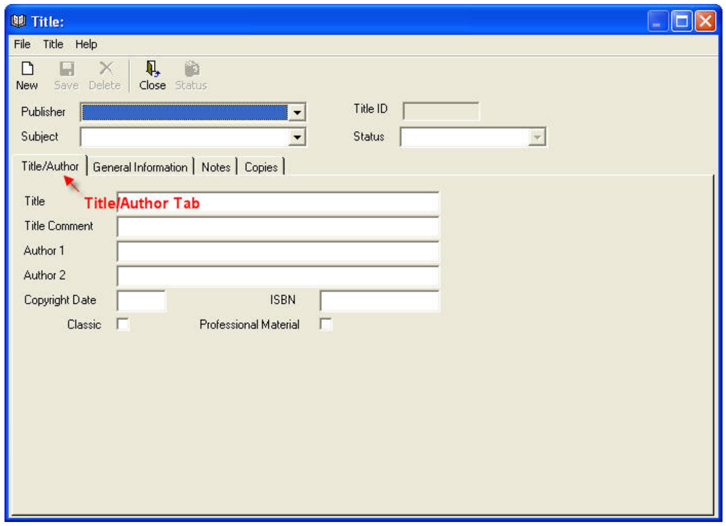
2. Search for the ISBN/Title (see *Searching the Grid*)

3. If the “Title” is found, **do not re-enter**.

4. If the “Title” is not found go to the top of the screen and click “New”.



5. A form will appear. Make sure you are on the “Title/Author” tab.



6. Choose the drop down box “Publisher” and select the correct “Publisher”.

7. If the “Publisher” you want does not appear, you will need to correct this later after the “Publisher” information is added to the “Publisher” view. Make a note of the “Access Number Prefix” or the “Title ID” and what needs correcting!

8. Choose the drop down box “Subject” and select the correct “Subject” based upon your guidelines.

9. If the “Subject” you want does not appear, you will need to correct this later after the “Subject” information is added to the “Subject” view. Make a note of the “Access Number Prefix” and what needs correcting!

10. Enter the “Title”.

11. Enter the “Title Comment”, if any.

12. Enter the “Author 1” and “Author 2”. If you want to simplify searching authors later you have some choices:
    a. Use only last names.
    b. Use last names first, then first names.
    c. Place all of the author’s last names in “Author 1”.
    d. Place the first author in “Author 1” and the second author in “Author 2” followed by et al. if more than two.

13. Enter “Copyright Date” as a four digit year date “YYYY”.

14. Enter the “ISBN”. <u>Do not use any spaces or punctuation</u>!

15. You may check none, either, or both “Classic” or “Professional Material”. “Classic” is a term used for fiction (non-textbook) and “Professional Material” is a term referring to teacher materials (non-student textbook).

16. At the top of the form click “Save”.

17. Choose the drop down box “Status” and select “Active”. You will get a message “Are you sure you want to change the Status of this record?”… Choose “Yes”.

18. Choose the tab “General Information”.

19. Click the button “Assign New Access No Prefix”. The “Access Prefix” will now be populated with the next available “Access Prefix”.

20. Enter the title “Series”.

21. Choose the drop down box “No. of Chapters” and a keypad will appear.

22. Enter the “Number of Chapters” and click “OK” to enter or “Cancel” to start over.

23. Choose the drop down boxes “Low Grade” “High Grade”. You have several choices here:
    a. Enter no grade for either.
    b. Enter the single grade assigned in “Low Grade”
    c. Enter a grade range with the lower in”Low Grade” and the higher in “High Grade”.

24. Choose the drop down box “Printed Pages” and a keypad will appear.

25. Enter the number of “Printed Pages” and click “OK” to enter or “Cancel” to start over.

26. You may now go to the “Notes” tab on the form and enter anything you wish that might help you better understand this “Title Copy” in the future.

27. Carefully look over all of the information you have entered.

28. Go to the top of the form and choose “Save”.

29. Go to the top of the form and choose “Close”.

30. The “Title” has been added.

B. Entering Title Copies <u>without</u> Creating an External Order

(Given: This procedure is used to enter collections primarily at startup. The title record for this book exists, but this is a new copy and no purchase was made.)

1. Go to <u>group</u> "Titles" and then choose the <u>view</u> "Titles" and Search for the ISBN/Title.

2. If found, note the six digit "Access Prefix".

3. If not found, enter the new Title (see Entering Titles) and write down the six digit "Access Prefix".

4. Go to group "Titles" and then choose "All Title Copies".

5. At the top of the screen click "New" and a form will appear.

6. Choose the drop down box "Material Type" as "Title Copy" and a new form will appear. Make sure you are on the tab "Book".

7. Choose the drop down box "Title" and scroll until the six digit <u>Access Prefix</u> matches.

8. You will see the six digit Access Prefix followed by NA and 0001.

9. Choose the drop down box "Media Type" and select the correct media.

10. The six digit <u>Access Prefix</u> is now followed by the <u>Media Type ID</u> you chose and the copy number indicates the next available.

11. Choose the drop down box "Braille Type" (if appropriate) and select the "Braille Type" (not required).

12. Choose the drop down box "Number of Pages" and a keypad will appear.

13. Enter the "Number of Pages" and click "OK" to enter or "Cancel" to start over.

14. At the top of the form choose "Save". You will get a message "Are you sure you want to change the Status of this record", choose "No".

15. Change the Status now to "Available".

16. Again you will get the message "Are you sure you want to change the Status of this record", choose "Yes". Your <u>Title Copy</u> is recorded.

17. Choose the drop down box "Number of Volumes" and a keypad will appear.
18. Enter the "Number of Volumes" and click "OK" to enter or "Cancel" to start over.

19. At the top of the form choose "Save".

20. A list of volumes will be populated below. The status will default to On-Order. You may leave the status this way or change each to "Produced".

21. Choose the drop down box "Status" and select "Available".

22. Enter any other information on this tab you wish.

23. Make sure your computer is connected to the label printer and the printer is loaded with labels and is turned on.

24. Click the button “Print Label(s)”.

25. A label will be printed for each volume and a check mark under “Printed” will appear. This indicates that label was printed.

26. If there is a misprint on any or all labels, just uncheck the volume you want to print and click “Print Label(s)” again.

27. Choose the “General Information” tab on the form.

28. Enter the “Warehouse Location” or shelf.

29. Choose the drop down box “Condition” and select “Useable”.

30. Choose the drop down box “Producer” and select the “Producer”. This will default to RFBD if you do nothing. If the “Producer” you want does not appear, you will need to correct this later after the “Producer” information is added to the “Producer” view. Make a note of the entire “Access Number”!

31. Ignore the “Recommended Number on Hand” as this is for supplies only.

32. Enter the Producer’s “Catalog Number” if available.

33. Choose the drop down box “Value” and a keypad will appear.

34. Enter the “Value” and click “OK” or “Cancel” to start over.

35. You may check none, any, or all “Borrowed”, “Restricted”, “Professional Material”.

36. You may now go to the “Notes” tab on the form and enter anything you wish that might help you better understand this “Title Copy” in the future.

37. Carefully look over all of the information you have entered.

38. Go to the top of the form and choose “Save” once again.

39. Go to the top of the form and choose “Close”.

40. The “Title Copy” has been added.

Part Two: “Processing Transactions”

SyLNX, Incorporated

Version 2.01
January 2004

Section 1. Patron Order Information

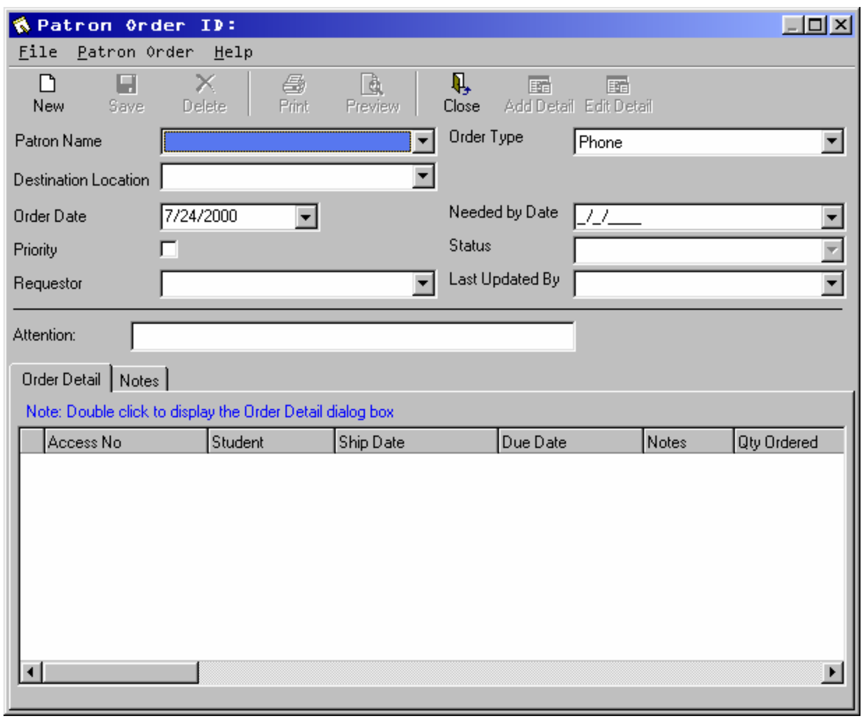
Patron Order information is available from the *Patron Order Group* within the DATALNX-MIS application. To select Patron Orders, select the *All Patron Orders* icon within the Group. Once you select *All Patron Orders*, the application will display a listing of all the Patron Orders within the system. You may perform the following functions in addition to the standard analytical functions of the application:

- Create a New Order
- Open an Existing Order
- Delete an Order

Note: Your ability to perform these functions is limited to the security restrictions placed on you by the System Administrator.

A. How do you create a new Patron Order?

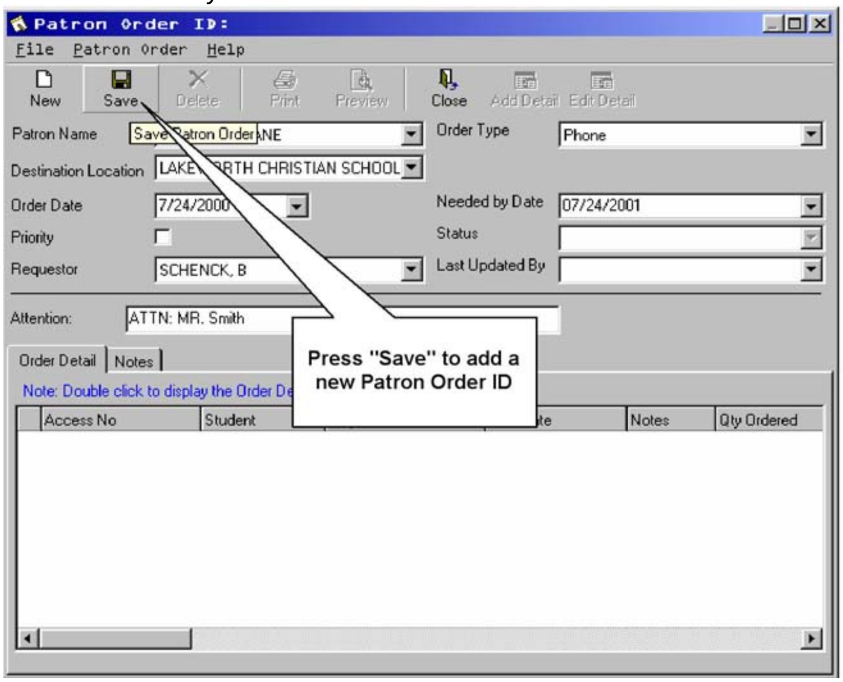
Once you have selected the Patron Order icon, and the list of Patron Orders appears in the data area, you may press the **New** *button on the toolbar to display the Patron Order dialog.*



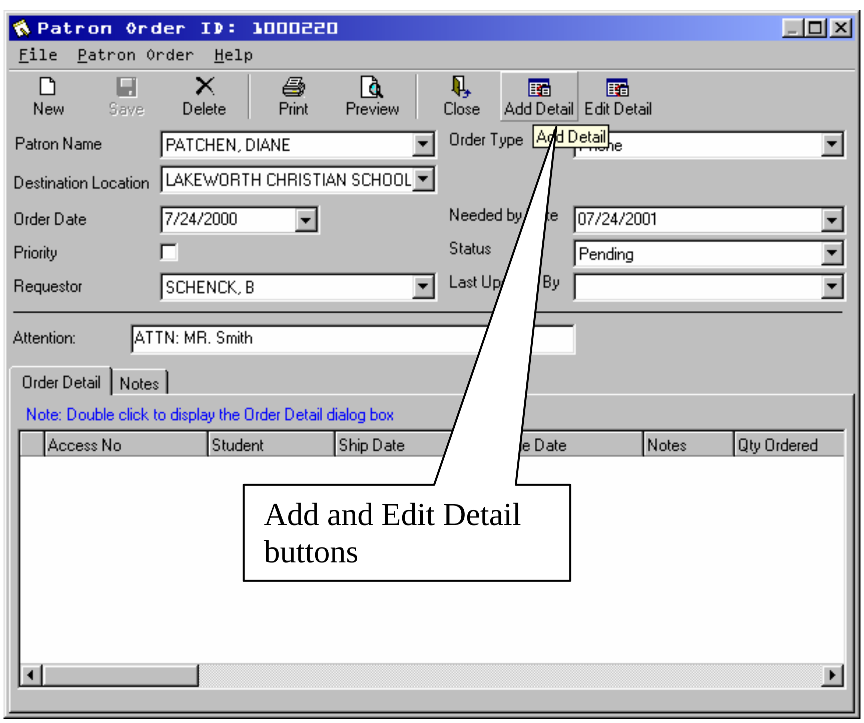
This dialog allows you to create a new Patron Order. Notice that the Add Detail and Edit Detail buttons are disabled. The reason that they are disabled is because the Patron Order has not been saved. In order to save the record, the following basic information must be entered:

Patron Name
Destination Location
Order Date
Requestor
Order Type
Attention Line

Once this information has been entered the record must be Saved. Once saved, a new Patron Order ID is assigned. (An Order ID is required before an Order Detail Line may be added) The Patron Order ID is the unique identifier for the Patron Order and can be given to the Patron so that the order may be referenced in the future.



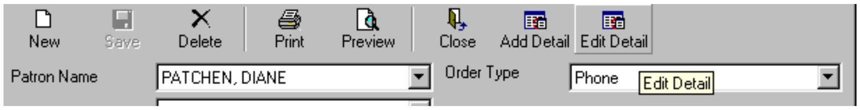
After the Patron Order has been saved, the Add Detail and Edit Detail buttons will be enabled. It is with these buttons that you may add new items to the Patron Order.



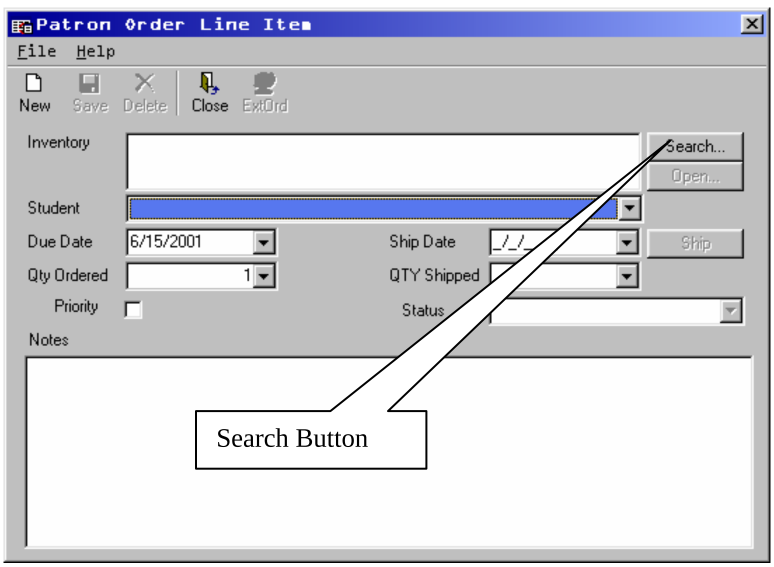
B. Adding Detail to a Patron Order

To add an inventory item to a Patron Order, you must first open the Patron Order Detail Record (see New Patron Order or How do you Update Patron Order Information).

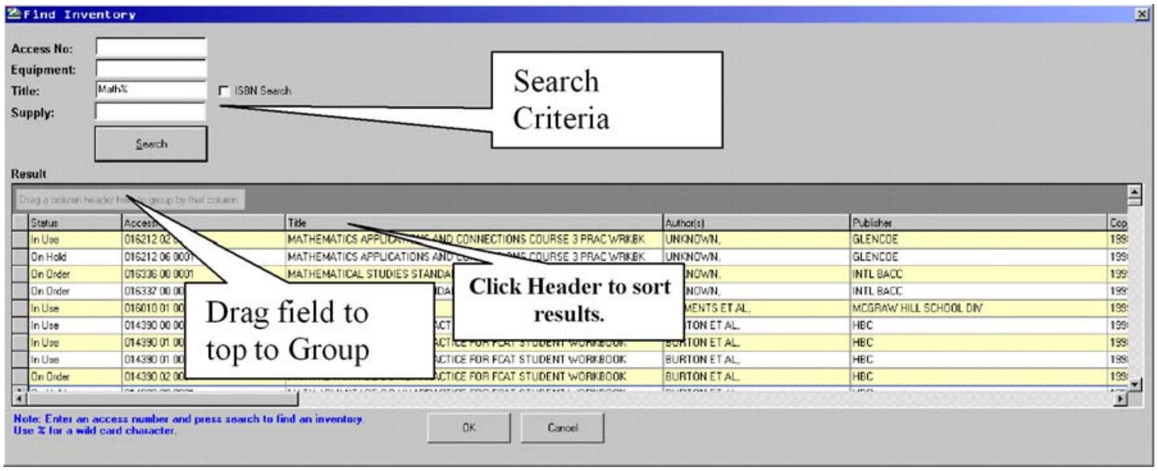
Once the dialog is opened, press the Add Detail Button.



This action will open the Add Detail Dialog which will allow you to select an inventory item to associate to the Patron Order.



There are a number of important fields that should be reviewed on this dialog. First, the Inventory box, which displays the inventory item that has been selected for the *Patron Order Line Item*. This box is a Read Only box which cannot be edited directly. To add an inventory item to the box, you must use the ***Search*** button which displays the *Search Dialog*.



This powerful dialog will allow you to search the inventory database for items by Access Number, Equipment Description, Title, and Supply Description. Wild cards can be used to assist in locating the desired record. For instance, you may type Math% to search for all Titles starting with Math. You can also search for %Math% which will display all titles with “math” within the title description.

Wildcard Parameters include the following:

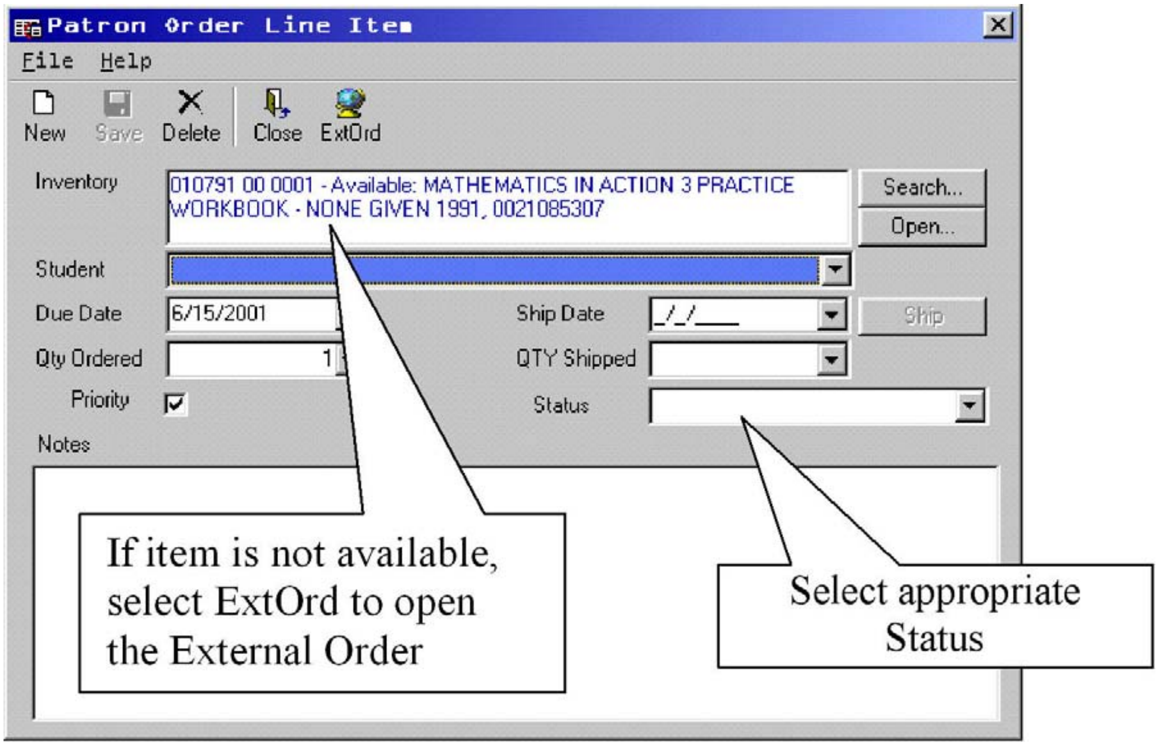
% = Include all text
? = Substitute one character

Math%	%Math
Mathematics Applications	Fun with Math
Math as a second language	Wizard Math

It should be noted that when entering search criteria, it is not necessary to use the “%” wildcard because it is entered automatically for you.

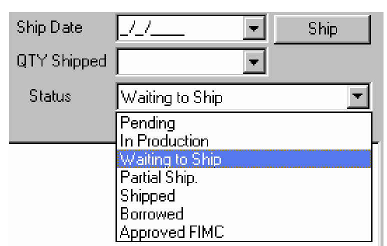
Additionally, the Search Dialog allows you to perform some of the data manipulation features of the main application including *Sorting* and *Grouping* of the results.

Once the correct item is located, *double click* the item or press ***Ok*** to return to the Patron Order Line Item dialog.



Once you have returned to the Patron Order Line Item dialog, you must complete the information on the dialog. This information includes:

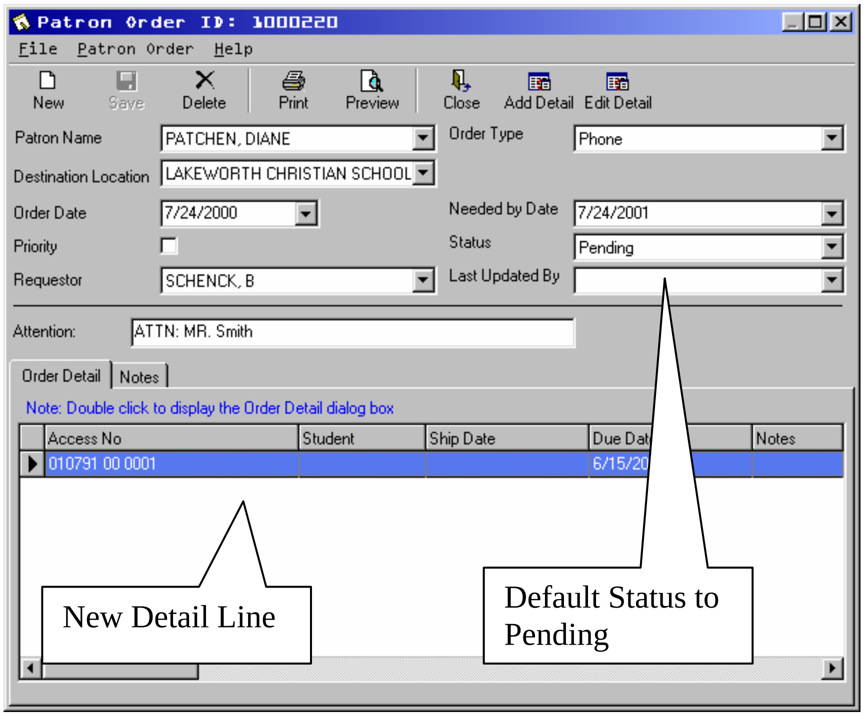
- Student that the item is being used by
- Due Date of the Item
- Quantity Order (Default to 1)
- Priority (is the item order a priority item?)
- Status of the item (If approved, select Approved)



After the information has been entered, press ***Save*** and ***Close*** to return to the *Patron Order dialog*.

If the item is not available at the time of the Patron Order, you may select a similar item to the one desired. Once selected and you return to the Patron Order Line Item dialog, select ExtOrd, which will open the External Order dialog (See creating an External Order).

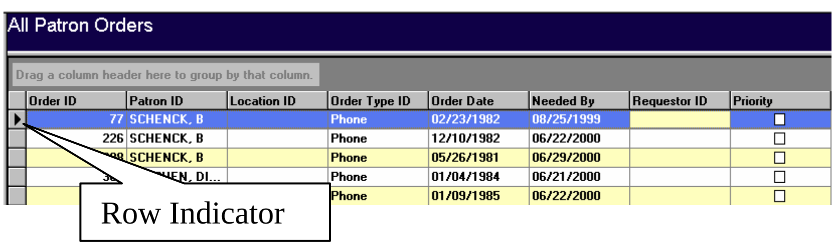
If you have added a Detail item to the Patron Order, your dialog should look similar to the following:



Note: It is very important to select the appropriate status for the Patron Order Line Item because of business rules that are enforced within the system. These business rules streamline the Patron Order process so that your job is made easier. For instance, if the line item is approved , and the item is Available, the system automatically notifies the shipping department that the item is Ready to Ship, as well as mark the item as Waiting to Ship so that it is not used within another Patron Order Line Item.

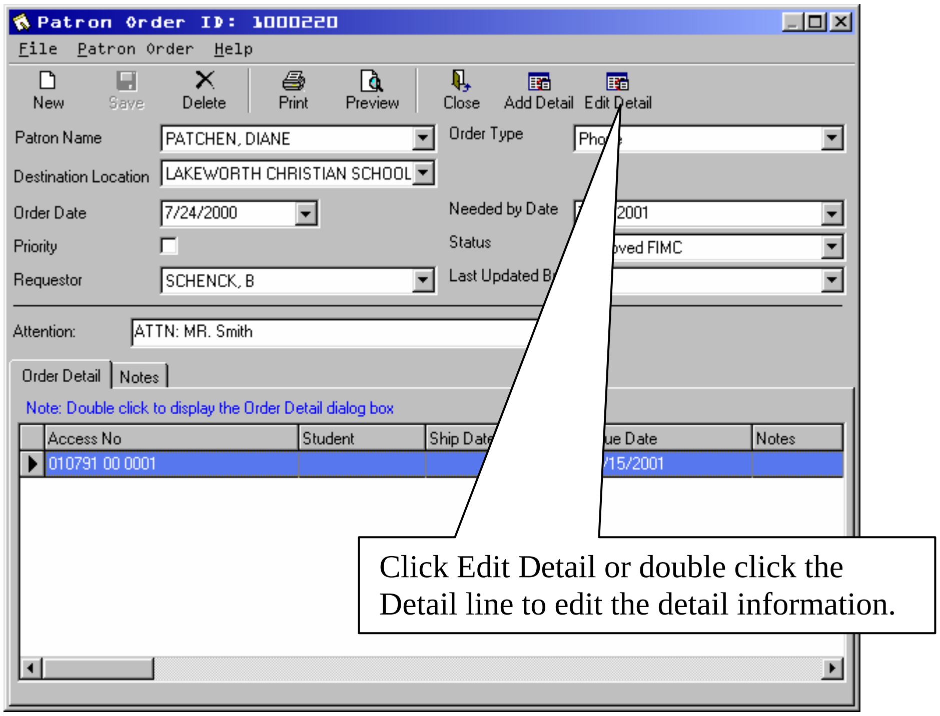
C. How do you update Patron Order Information?

Select the desired row of information that you would like to edit. You can either do this by clicking on any cell within the row or by selecting the row indicator next to the desired row. Once selected, the row indicator will display an arrow next to the row.



To edit the record, either double click the row indicator, or select Open from the tool bar.

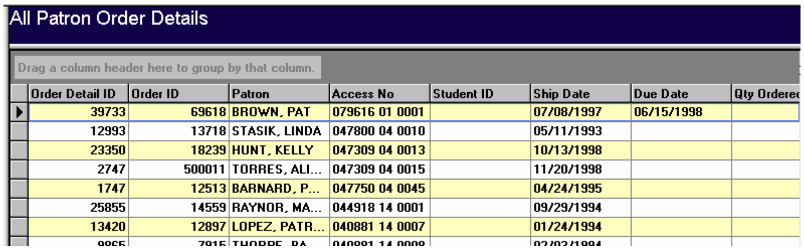
Once opened, the Patron Order dialog is displayed:



Refer to Adding Detail to a Patron Order for more information on how to edit the Patron Order Line Item information.

D. How do I find a Patron's Order Detail?

To find detail regarding all Patron Orders, you may select the All Patron Order Details icon within the Patron Order group. This listing allows you to search for specific details of an order including Patron, Access Number, Order ID, etc.

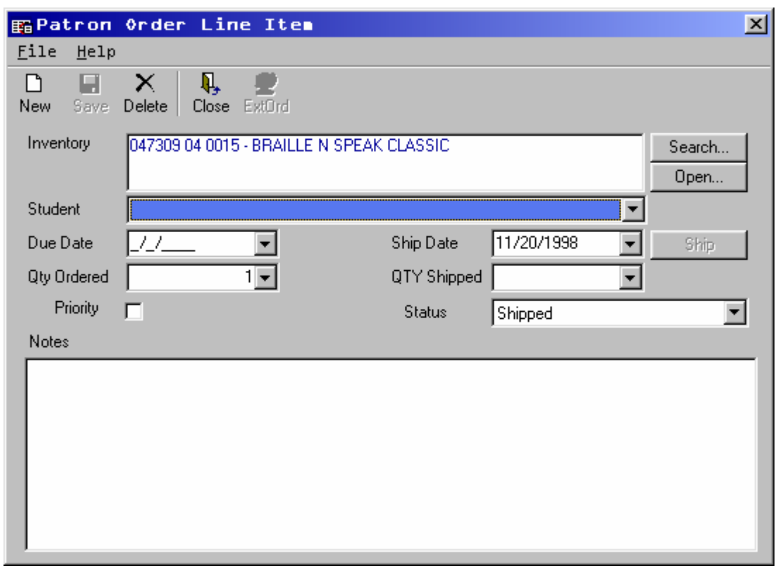


Order Detail ID	Order ID	Patron	Access No	Student ID	Ship Date	Due Date	Qty Ordered
39733	69618	BROWN, PAT	079616 01 0001		07/08/1997	06/15/1998	
12993	13718	STASIK, LINDA	047800 04 0010		05/11/1993		
23350	18239	HUNT, KELLY	047309 04 0013		10/13/1998		
2747	500011	TORRES, ALI...	047309 04 0015		11/20/1998		
1747	12513	BARNARD, P...	047750 04 0045		04/24/1995		
25855	14559	RAYNOR, MA...	044918 14 0001		09/29/1994		
13420	12897	LOPEZ, PATR...	040881 14 0007		01/24/1994		

You can use all the features of the application to find and report on the status of a Patron Order's Line Items and their status (See Filtering, Grouping within this document).

Once you have found the desired item, you may open the item by double clicking the row indicator or by pressing Open on the toolbar.

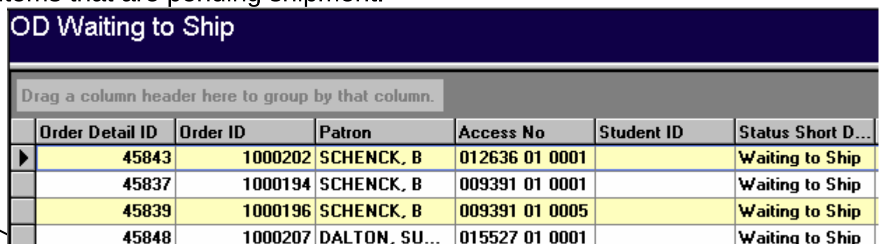
Editing the Patron Order Line Item displays the following dialog.



Refer to the section on Updating Patron Order Information for more information on this and the associated Patron Order dialog.

D. How do I Ship Items that are Waiting To Ship?

To determine items that are Waiting to Ship, select the OD Waiting to Ship icon on the application within the Patron Order group. The list that is displayed represents items that are pending shipment.



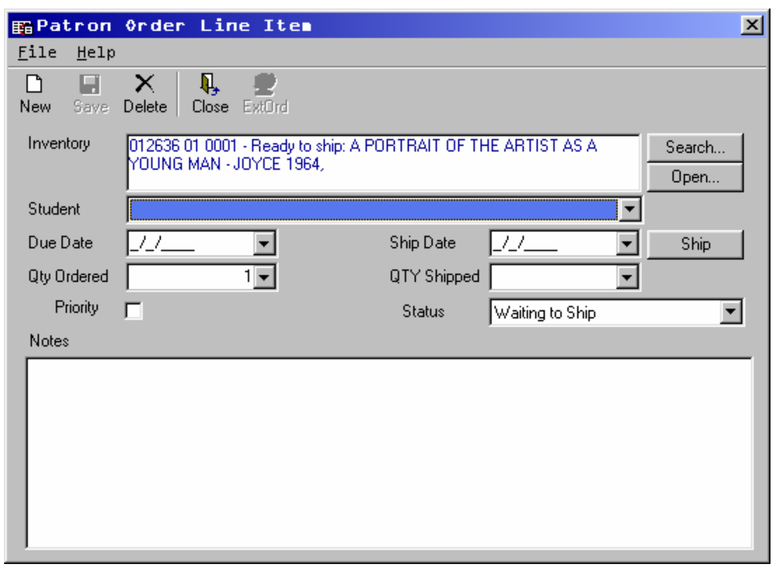
OD Waiting to Ship

Drag a column header here to group by that column.

Order Detail ID	Order ID	Patron	Access No	Student ID	Status Short D...
45843	1000202	SCHENCK, B	012636 01 0001		Waiting to Ship
45837	1000194	SCHENCK, B	009391 01 0001		Waiting to Ship
45839	1000196	SCHENCK, B	009391 01 0005		Waiting to Ship
45848	1000207	DALTON, SU...	015527 01 0001		Waiting to Ship

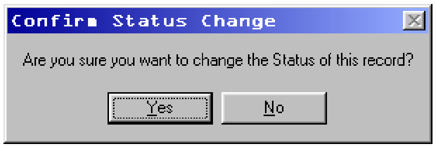
Select OD Waiting to Ship to display Order Details waiting to

Double click on the record indicator to open the Order Detail Line Item.



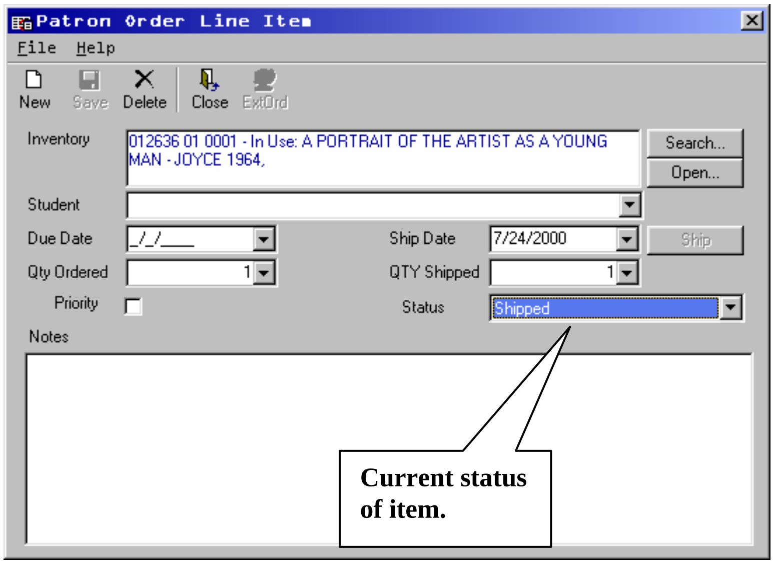
To Ship the item, select the Ship button. The following dialog will be displayed asking whether the shipment is complete or not (Are all volumes included?_

If the shipment is complete, the status will be updated to Shipped. You will be asked to confirm the status change. If you select No, the item's status will be updated to Partial Shipment until such time as the shipment is complete.

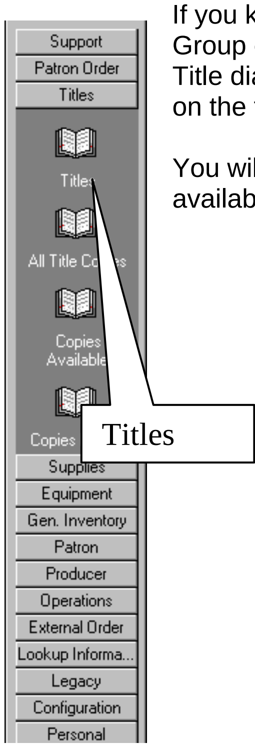


You will be asked to confirm the change of status for the item. Select Yes to process the update to the Order Detail Line Item.

The Patron Order Line Item dialog should reflect the Ship status you selected.

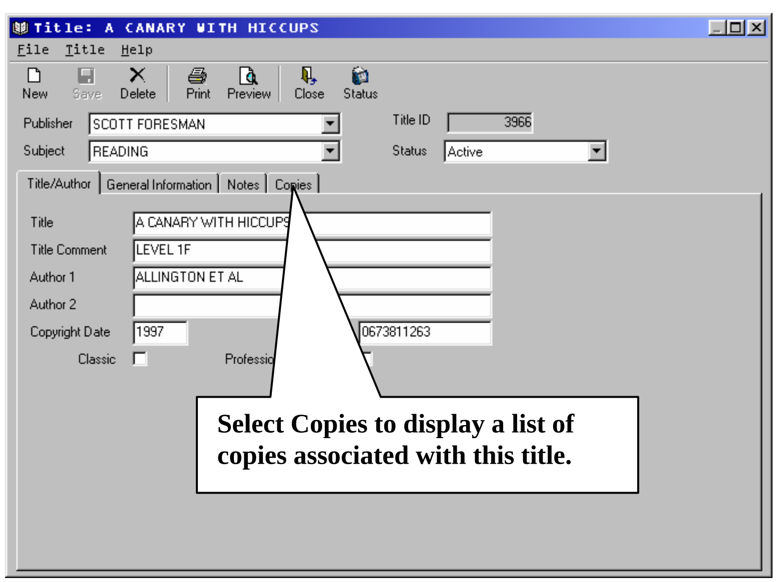


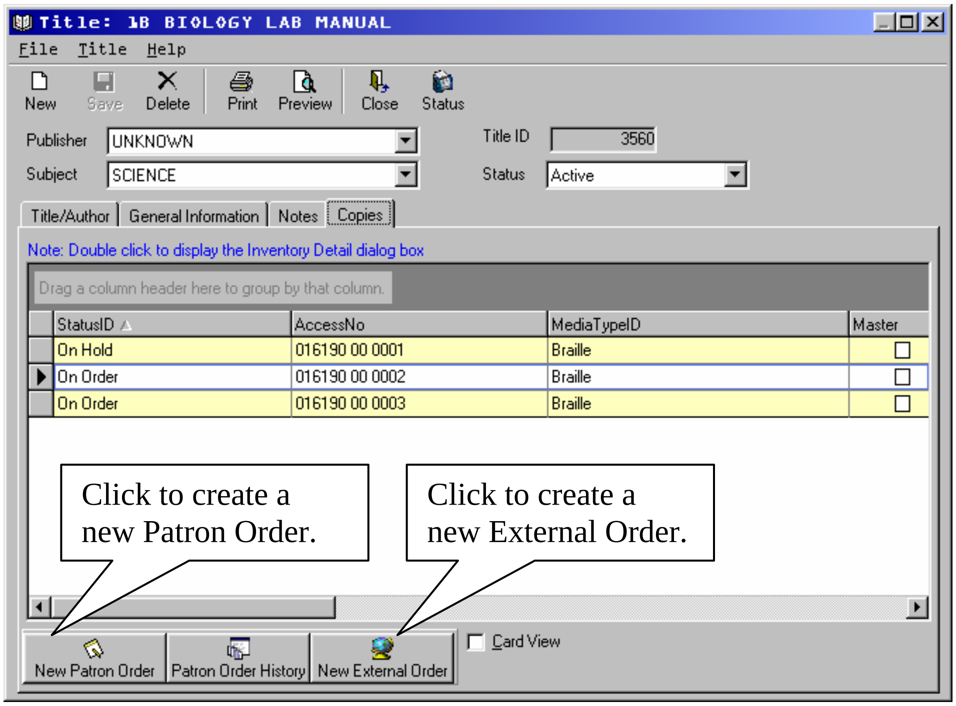
E. If I know the Title, Can I Create a Patron Order?



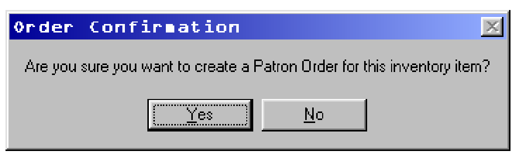
If you know the title you want to order, select the Title icon from within the Titles Group of the application. Once you find the desired title within the listing, open the Title dialog by double clicking on the row indicator or by pressing the Open button on the toolbar.

You will be presented with the Title dialog. Select the Copies Tab to list the available copies for this title.



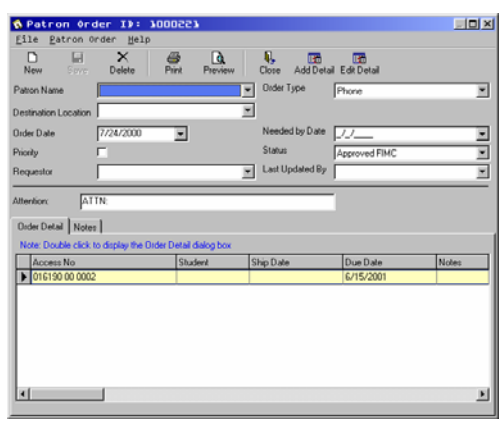


There are a number of functions that can be performed from this dialog that can assist with Patron Order and External Orders. These "one step" functions, allow you to create a Patron Order using the information selected in the Copy detail listing. To do this, select an item within the list and press New Patron Order.



If you select Yes, the system will automatically create a new Patron Order with the Patron Order Line Item populated with the information you selected in the Title Dialog.

You must complete this dialog by selecting the Patron Name, etc., however the status of the item is automatically set to Approved and is entered into the system to be processed as the item is available or as is determined by your business rules.



F. What about patron orders created from the Online Order System?

Website orders are processed the same way as other orders. The only difference is that they will show up in a different view than paper, fax or phone orders. To find detail regarding Patron Orders from the Online Order System, you may select the Website Order Details icon within the Patron Order group.

Section 2. External Order Information

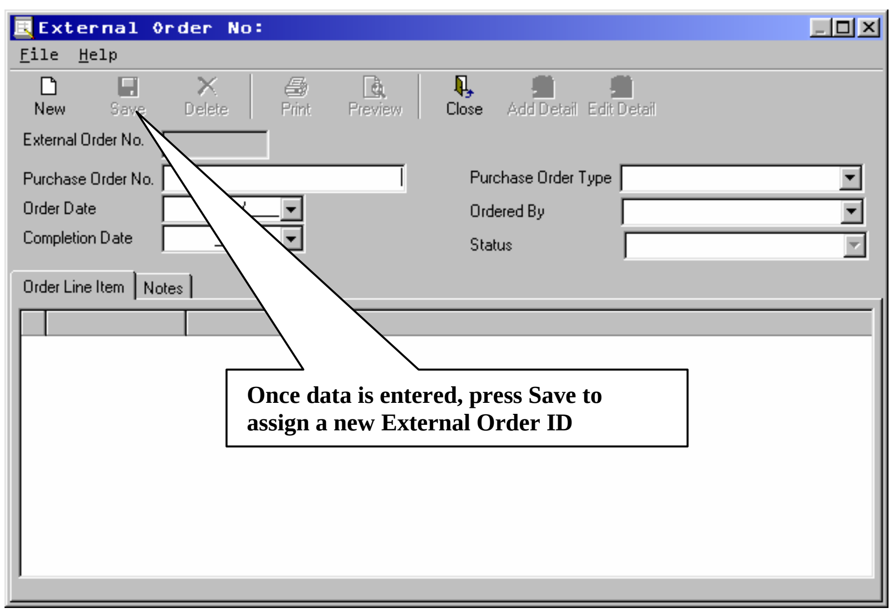
External Orders are requests from a production source to create or deliver an Inventory item. It should be noted that the internal production capabilities of the IMC is considered to be a Production Source and thus should be managed through the External Order processes along with book publishers, volunteers, etc.

Accessing the External Order information is achieved by selecting the External Order group within the application. Your options within this group include:

EO: On Order – External Orders that have a status of On Order
All External Order – A complete listing of all External Orders
All External Order Detail – A complete listing of all External Order Line Items

A. How do I create an External Order?

To create an External Order, you must select the All External Order icon within the External Order group of the application. Once the list of existing External Orders is displayed, press New on the toolbar to create a new External Order.

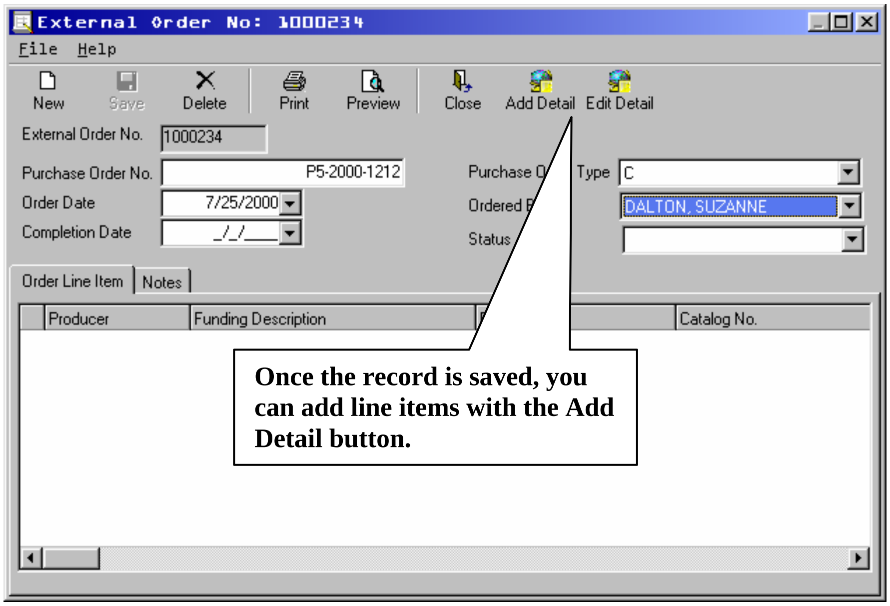


Once the form has displayed, you may start entering the information necessary for the External Order. Keep in mind, in order to create the External Order ID and then associate Order Line Items, the External Order must be saved. Enter the information into the fields and then press Save to save the External Order and assign a new External Order ID.

You will notice some changes in the dialog once the record is saved:

- The Add Detail button is enabled
- The Edit Detail button is enabled

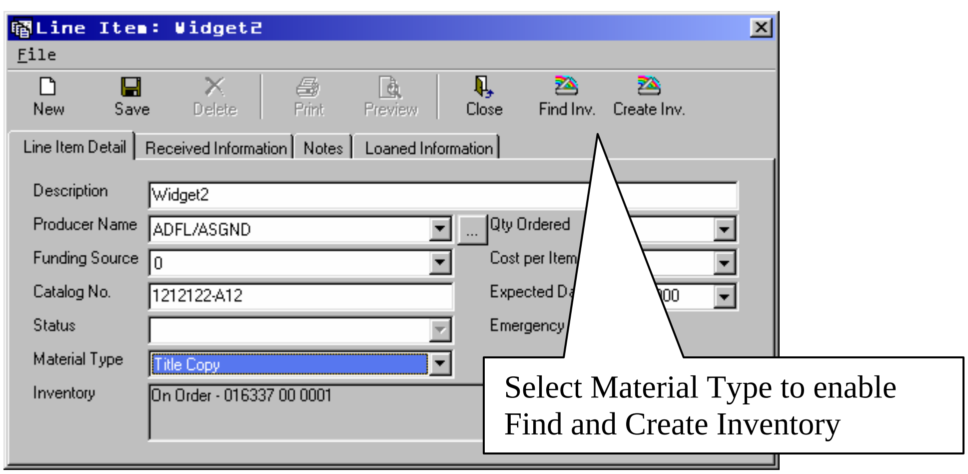
These buttons allow you to associate a new Line Item to the External Order.



Select the Add Detail button to add a new line item to the External Order.

B. How do I edit an External Order Line Item?

External Order Line Item information is available from the Application group (All External Order Detail) or by opening an existing order and double clicking on the Line Item, or pressing the Edit Detail button on the toolbar.

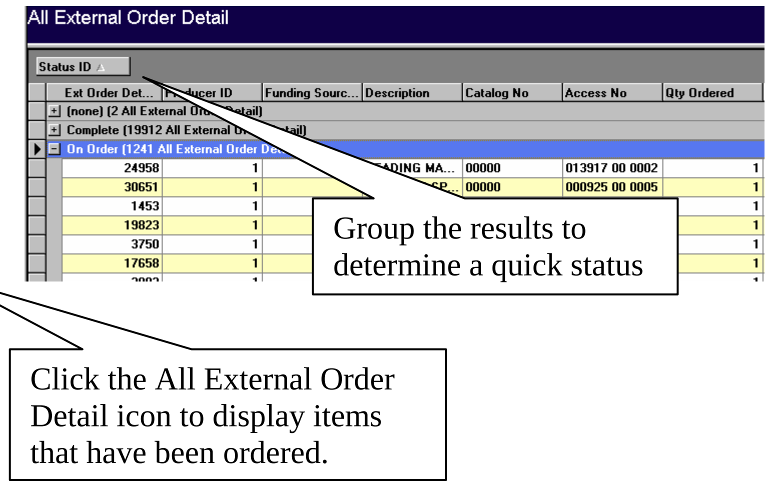


This dialog allows you to enter the information about the item that you are ordering. It is important to complete as many fields as possible so that the information can be tracked properly. Once the Material Type is selected, you will notice that the Find Inv. (Find Inventory) button will enabled. This indicates that you can select this button to search for a similar item within the inventory to retrieve the Inventory information including the Access Number. Press the Create Inv. (Create Inventory) button to create a new inventory item and associate it to the External Order Line Item.

Once this information is complete, you will need to save it (by pressing the Save button). When the item is saved, a new inventory record is created with the information provided. This inventory will be given a status of **On-Order** so that it may be tracked.

C. How do I find out if an item is On Order?

To determine if an item is On Order, select the External Order group within the application and then press the All External Order Detail icon. Doing so will display a listing of all items that have been ordered. To determine if an item is On Order, group the information by Status.



To edit one of these items, *double click* the row indicator on the left, or press the ***Open*** button on the toolbar.

Section 3. Online Order System

The online order system allows teachers to login and enter their orders over the Internet. Once they've finalized their orders, these will be visible in DataLNX for processing by the IMC staff.

A. How do I login to the website?

The first page that comes up when you enter the website address will be the login page. If you do not have your userid and password, please contact the IMC. Otherwise, enter the userid and password and press enter. If successful, you'll be taken to the welcome page.

B. How do I search for a book?

To search for a book, click on the Search for Books link on the left. This will bring up the Title Search page. In the Search Criteria field, enter the ISBN, Title, or Author of the book you wish to find. ISBN is the most reliable method. Choose the appropriate search type (either ISBN, Title or Author). The Search Method drop-down box has up to three choices: Begins With, Contains, and Sounds Like. You will usually want to use Begins With. If you enter "Mathematics" as your criteria, Title as the type, and Begins With as the method, it will only search for books where the "Mathematics" is the first word of the title. If you choose Contains as the method, it will search for books where "Mathematics" shows up anywhere in the title. The Sounds Like option is usually used when searching for authors' last names. If you put in "Johnson" as the criteria, Author as the type, and Sounds Like as the method, it will likely return any books where the Author sounds like Johnson, such as Johnsen, Jansen, Johansen, etc.

C. How do I interpret search results?

After you've entered your search criteria and pressed the "Search" button, you will get 0 or more titles that match your query. These will show up in alphabetical order by title. There will be up to ten titles per page, and there will be links at the top and bottom so you can move to other pages if there are more than ten matching titles. Below is an example of a title listing:

MATHEMATICS APPLICATIONS AND CONNECTIONS COURSE 1			STAFF
1995	002824592X		Glencoe
	Available:	**Total:**	**Action:**
Braille:	0	6	Add to Bookbag
LargePrint:	1	1	Add to Bookbag
Audio:	0	0	Send Order Request to FIMC

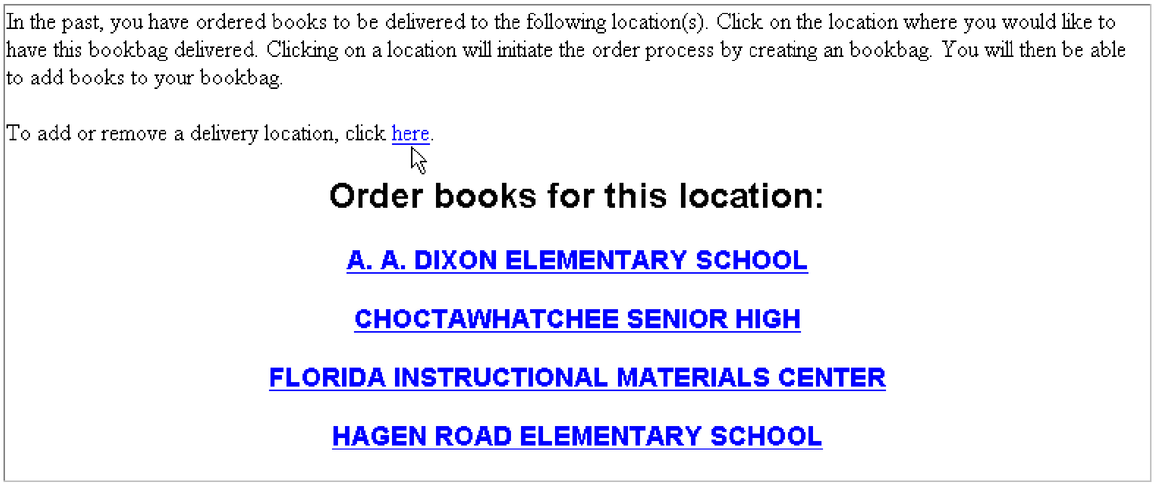
At the top of each listing will be the title and author. The next line contains the copyright date, ISBN, and publisher. Below that is a listing of the different media types that are available. In this example, there are six Braille copies, but none available. This means that the IMC has 6 Braille copies, but they are all currently checked out by other teachers. You can place an order for these books, but, if approved, it will take a certain amount of time for the IMC to order the book from an outside vendor. There is one large print copy, and it is available. You can order this book, and you will likely receive it more quickly than if the book were not available. the IMC does not have any audio copies of this book. So if you want an audio copy, you'll have to send an Order Request. This means that the IMC will need to review the request and see if it's valid for this book, then order the book from an outside vendor.

D. How do I place an order?

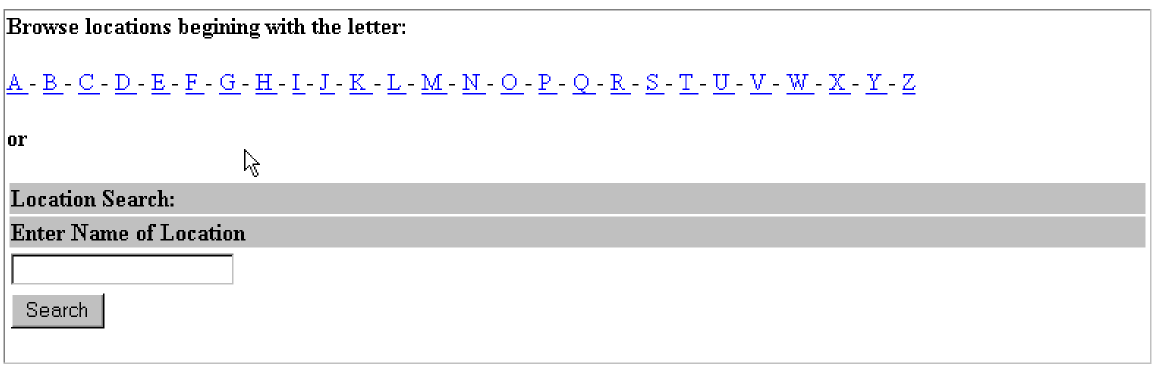
After you've found the book you want, click the "Add to Bookbag" link. If you've not yet selected a location to ship the book, there will be a link for you to follow to take you to Select Location page.

E. How do I select a location to ship the book?

If you've already found the book you want via the search function, you should already be at the Select Location page. If you haven't yet searched for books, but you already know where you want them to be shipped, or if you want to change your location from your last order, you can click the "Create Order/Change Location" link on the left to bring up the Select Location page:



If you see your location listed, just click on it and that is where your book will be shipped. If you do not see your location, you'll need to select it from the location list. To do this, click the appropriate link. You'll be taken to the Location Search page:



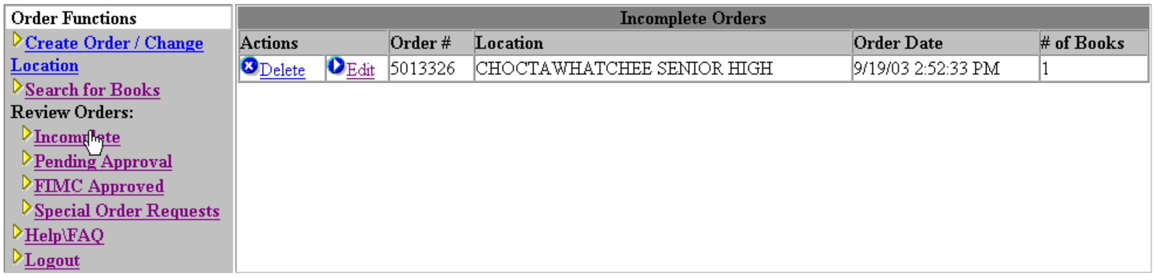
Here you can browse locations by clicking on the letter that corresponds with the first letter of the location's name or entering the name of the location and clicking the search button. After you've chosen your location, you'll be taken back to the Select Location page where you can choose the appropriate location.

F. What student ID number should I use?

During the process of adding a book to your bookbag, you'll be asked to enter the student ID number. This is a number that the IMC assigns to students to ensure their privacy. the IMC will notify you of your students' ID numbers. If you do not have your students ID numbers, you must contact the IMC for this information.

G. How do I review, add or remove books from an existing order that has not been finalized and submitted to the IMC?

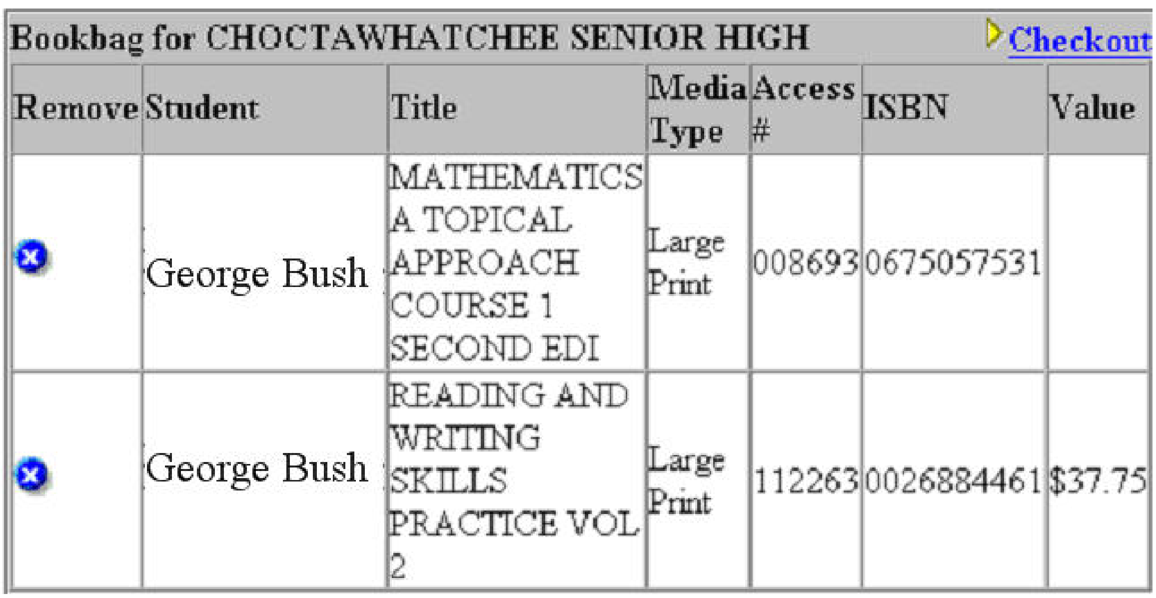
If you want to see incomplete orders, you can click the link on the left side of the page that says "Incomplete" under the heading "Review Orders."



Incomplete Orders

Actions		Order #	Location	Order Date	# of Books
Delete	Edit	5013326	CHOCTAWHATCHEE SENIOR HIGH	9/19/03 2:52:33 PM	1

You'll see a list of your orders that have not been finalized. If you made a mistake and wish to delete the ENTIRE order, you can do so by clicking the Delete link. If you want to add or remove books, click the Edit link. This will open up the Title Search screen in the middle of the page and the Bookbag at the right side of the page. The bookbag will look similar to the following screenshot:



Bookbag for CHOCTAWHATCHEE SENIOR HIGH — Checkout

Remove	Student	Title	Media Type	Access #	ISBN	Value
	George Bush	MATHEMATICS A TOPICAL APPROACH COURSE 1 SECOND EDI	Large Print	008693	0675057531	
	George Bush	READING AND WRITING SKILLS PRACTICE VOL 2	Large Print	112263	0026884461	$37.75

If you want to remove a particular book from the bookbag, just click the remove button next to the book. If you've finished adding books to this order and wish to finalize the order, click the Checkout button on the top right. A confirmation page will come up. Once you have confirmed your order, it will be sent to the IMC for processing.

H. How do I review orders that recently have been finalized and sent to the IMC for processing?

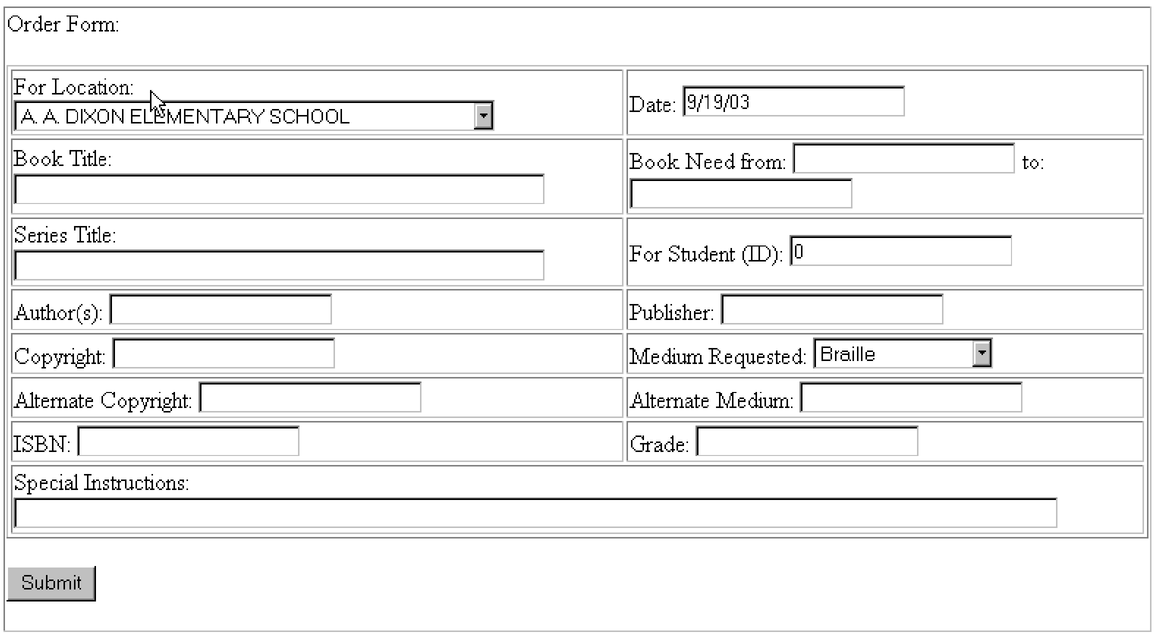
If you have checked out your bookbag and finalized the order, it will be sent to the IMC for approval. Until the IMC approves the order, it can be viewed by clicking on the Pending Approval link on the left of the page under the Review Orders heading. Any orders seen here may not be edited or deleted, but they may be reviewed by clicking on the Review link next to the order. If you have made a mistake and do not wish this order to be processed, please contact the IMC immediately.

I. How do I review old orders that have been processed by the IMC?

Click on the the IMC approved link on the left of the page under the "Review Orders" heading. A page will come up allowing you to choose a date range. Choose the appropriate date range, then click Submit, and a historical listing of all orders that fall within your date parameters will be shown for your review.

J. What if I have trouble finding the book I want?

If you've searched using several methods but still have not been able to find the book you want, you can fill out an order request. Click on the "Search for Books" link on the left, and then in the middle near the bottom of the page there will be a link to send an order request. Below is an example of the order request form:


Order Form:

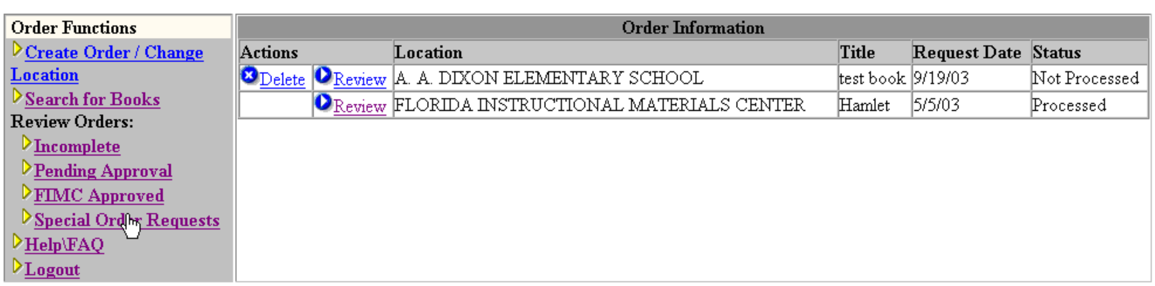
For Location: A. A. DIXON ELEMENTARY SCHOOL	Date: 9/19/03
Book Title:	Book Need from: to:
Series Title:	For Student (ID): 0
Author(s):	Publisher:
Copyright:	Medium Requested: Braille
Alternate Copyright:	Alternate Medium:
ISBN:	Grade:
Special Instructions:	

Submit

Enter as much information as you can. If you don't know your student's ID number, you'll need to contact the IMC for this information. When you're finished, press submit and it will go to the IMC to be processed.

K. How do I review my Special Order Requests?

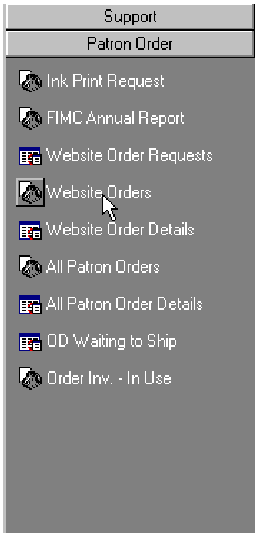
Click the "Special Order Requests" button on the left side of the website. From this page you can review Order Requests or delete ones that haven't been processed by the IMC (see below).


Order Functions
Create Order / Change Location
Search for Books
Review Orders:
Incomplete
Pending Approval
FIMC Approved
Special Order Requests
Help\FAQ
Logout

Order Information

Actions		Location	Title	Request Date	Status
Delete	Review	A. A. DIXON ELEMENTARY SCHOOL	test book	9/19/03	Not Processed
	Review	FLORIDA INSTRUCTIONAL MATERIALS CENTER	Hamlet	5/5/03	Processed

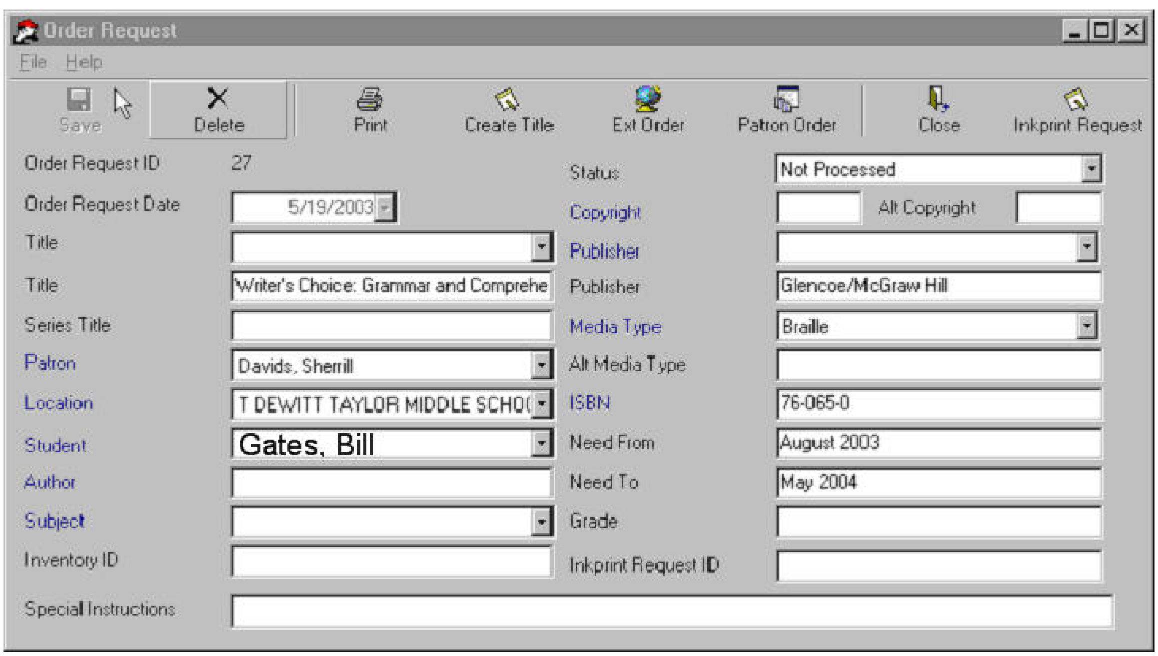
Section 4. Processing Online Orders



Under the patron order group there are two views (Website Orders, Website Order Details) that are used to show orders that come in from the online order system. Group by Status in order to see which orders need processing. If an order says it's "Not Submitted," that means that patron is still editing the order and it's not ready to be processed. If it says "Pending Approval," then the patron has completed the order and submitted it to the IMC for processing. These are the orders that require action. Open up the order and check to ensure that it's a valid order. Process this order the same way you would an order coming in from another source (fax, paper, or phone).

Website Order Requests

Internet users may not find the book they want in the database. If this happens, they may create an Order Request. This allows them to enter all the information they know about the book they want, along with the student and location information. After they've done this, they can save the request and it will show up in DataLNX. In some cases, the user may find the title they want, but there are no copies of the media type they want. If this happens, when the Order Request is opened, there will be information in the Title drop-down list. There are several fields on this form which appear in both drop-down and text-entry formats. The intended use is for the teacher to enter the text online, then the the IMC staff is able to research and select the appropriate fields from the drop-down menu. An order request will have a status of "Not Processed" until some action has been taken on it by the the IMC staff. Below is a screenshot of the Order Request Form:



Step-by-Step

Here are step-by-step instructions of what to do when a website order request comes in:

Step 1: First, check to see if the Title drop-down box is blank. If not, proceed to step 2. Otherwise, examine the fields entered by the teacher to ensure the request has been completed. It will be necessary to treat the order request as any order that may come in on paper or fax and follow all the necessary steps of sourcing the book, etc. After this has been accomplished, click the Create Title button. This will create a Title with the given information, pull the Title into the drop-down box, and open up the Title form for any additional data entry. If there is already a title with the ISBN in the database, it will not create another; rather it will pull this title into the drop-down box. Enter data as needed and save and close the Title form.

Step 2: Now that the Title has been created and associated with the Order Request, it's time to order the book from an external source. To do this, click the Ext Order button. This will create a new Title Copy under the Title that was created in step 1 or selected by the teacher. It will also create an External Order and External Order Line Item associated with this Title Copy and open up the External Order form for any additional data entry. Once this is done, save and close the External Order form to return to the Order Request. You will notice that the Inventory ID field has been populated. This means that this Order Request is now associated with a Title Copy and External Order Detail.

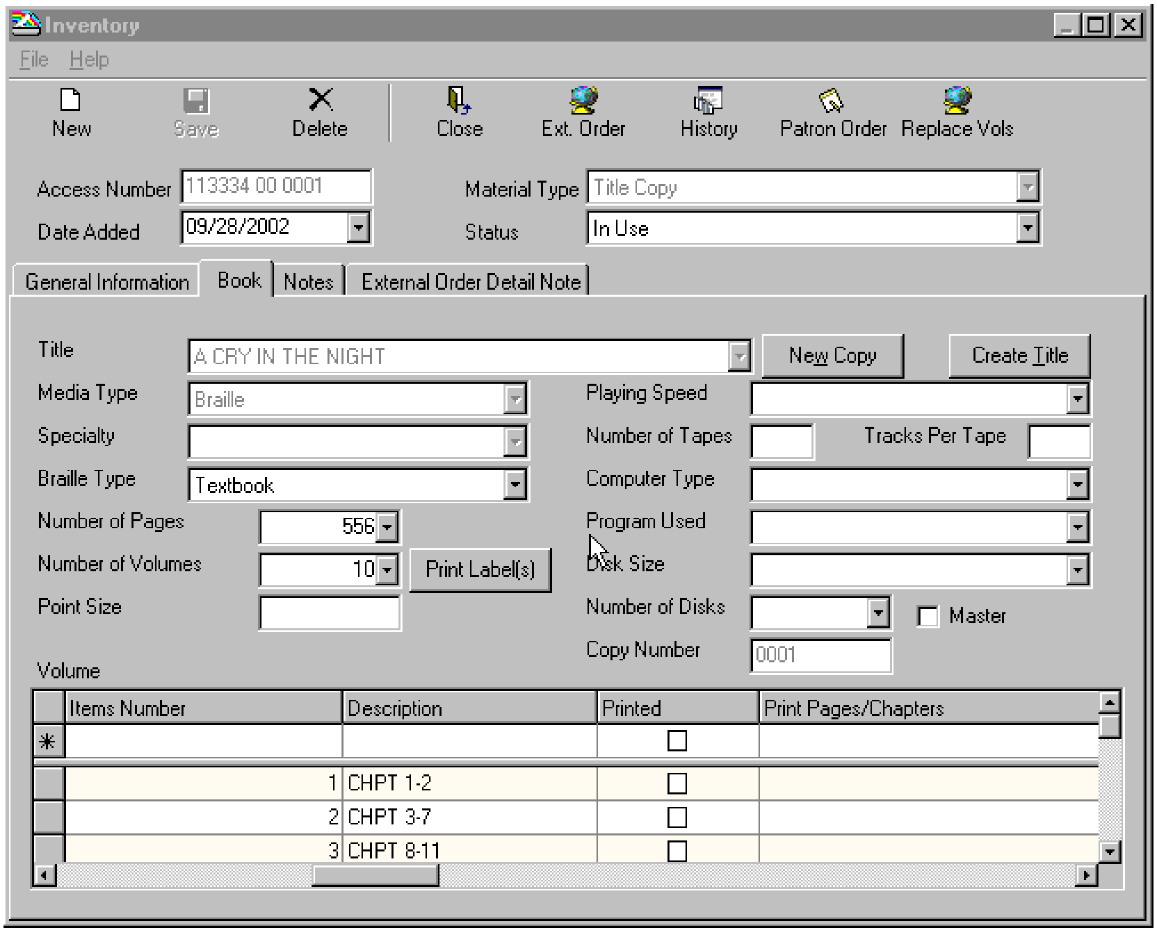
Step 3: Now that the Title, Title Copy, and External Order have been created, it's time to create the Patron Order. To do this, click the Patron Order button. This will create a new Patron Order and associate it with the Title Copy created in step 2. It will display the Patron Order form for any additional data entry. When this is done, save and close the Patron Order to return to the Order Request. At this stage, the Order Request status will change to Processed and you are done.

Section 5. Label Server

The label server works by querying the database for print jobs. There is a table in the database that holds text and user information for each label. If you wish to print a label, go to the appropriate place in DataLNX and click the print labels button. The database will track the username that requested the label be printed and use this to decide what PC will print the label. This means that labels will only print if you're logged on to DataLNX and the Label Server with the same username. This is generally used to make sure that labels only print on the same PC from which they were queued.

A. How do I print barcodes for books?

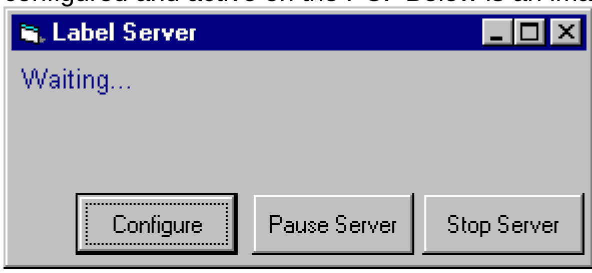
First, open up the Title Copy form for the book whose labels you'd like to print. You'll see a form similar to the one below:



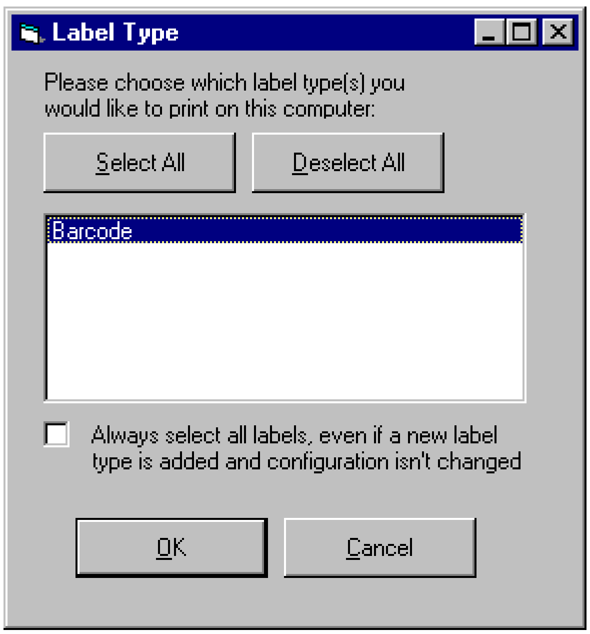
You'll see a check box called "Printed" for each volume. If this box is not checked for a particular volume, when you press the "Print Label(s)" button, a label will be sent to the Label Queue for that volume. After this happens, the system will put a check in the check box. So, if the button is clicked again, nothing will happen, since all the volumes have been checked as printed. In order to print another label, just uncheck the box, save the form, and click the "Print Label(s)" button.

B. How do I use the Label Server?

In order to print labels on a particular PC, the label printer drivers and software must be properly installed and configured by the technical support staff. Then, the Label Server must be configured and active on the PC. Below is an image of the main Label Server window:



The Label Server must be configured properly the first time it is run on a particular PC. To do this, click on the "Configure" button. You'll see a window like the one below:



There may be more than one Label Type available to print. If so, consult with the technical staff to see which types are appropriate on your PC. Then click OK, and the Label Server is now configured.

C. How do barcodes work?

When the Label Server prints out a book label with barcode, it will contain several pieces of information. Across the top it will have the IMC logo and address. Below that will have information about the book, such as title, author, and ISBN. At the bottom will be the access number and volume number. For example if a book with access number "123456 00 0001" has two volumes, the first volume's label will be "123456 00 0001 0001" and the next one's label will be "123456 00 0001 0002". This will also be the information contained within the barcode.