iSLIM

System for Library Information Management

Session 1   Introduction to iSLIM

- iSLIM overview: What is library computerization?

- iSLIM an integrated approach to library computerization.

- iSLIM Hardware/Software requirements.

- Getting familiar with iSLIM Getting started manual.

- iSLIM Installation procedure (Please refer to the iSLIM Getting started manual)

- iSLIM custom settings (Please refer to the iSLIM Getting started manual)

- Currency Application: Maintaining list of foreign currencies and current exchange rates.

- Supplier Master.

- The windows Explorer and certain features like copy, paste, print, delete and making directories.

- Backup and restore of iSLIM database.

- Introduction to different editor programs like MSWord, WordPad and Notepad etc

- Introduction to different web browser Like Mozilla Firefox, Chrome

- Windows Regional settings for Date and currency format.

- Types of different files and directories where iSLIM Application resides.   (Refer iSLIM Getting started)

- Explaining iSLIM user interface (Menu, Types of buttons, Tool tips, List boxes, Panes, Grids, and Grid buttons etc.)

| Tutorial | Customization: Setting Preferences, Defining type of material in the library, Maintaining Currencies, Creating supplier record, Set the Calendar, Mark/Unmark the holidays, Maintaining borrower Information.(Add, Edit, |

and Delete), Associating borrower's Photograph, Generating ID card for the borrowers, Add, Edit and Delete codes for Borrower Category, Lending Policy and Location, Creating roles and operators and setting Passwords for different operations in iSLIM.

Taking Backup of the Database/Restoring it back.

Uninstall and Install the iSLIM software.

Session 2   Setting preferences (Tutorial)

Tutorial 1.1   Configuration

iSLIM -> **UTL** Tab -> **Libraries** Button.

- For example, the **Details tab** allows you to enter library information such as Name, Address, Phone and Fax. The information is then displayed on different letters /reports available in different iSLIM modules.

- These values are stored in iSLIM database and are available from all letters /reports.

iSLIM -> **UTL** Tab -> **Preferences and Settings** Button.

- This option offers a list of items related to different settings specific to your requirements.

- Different settings are available in different list items of list box. This tutorial covers some of the settings.

- Select **Cataloguing** list item and enter the following information.

Option	Description	Value	Action
Item type for Journal Articles	The item type for the articles that will be created from Serials Control Module	J / A	Enter(Type)
Use letters from Author name for Author Mark	If true, the author mark will be created using the specified number of characters from the First Author field value.	True	Select
Number of initial letters to use from Author's name.	Number of Initial characters to be used from the author field to create author mark.	3	Enter(Type)
Create only Title Access Point for Items in acquisition	If true, items that are in the process of acquisition are available for browsing only in the title catalogue.	True	Select
Accession Numbers are only numeric	If true, allows only numeric accession numbers.	False	Select
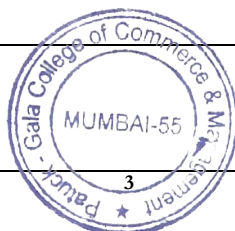
- Select **Circulation** list item and enter the following information.

Option	Description	Value	Action
Borrower ID for books on Display Stack	Borrower ID to be used for books which are put on Display Board. This allows reservation on books on display. In WebOPAC message will appear as " For Display" for books issued to borrower "XX0001".	XX0001	Enter (Type)
Lending Policy Codes for Reference Items	Lending Policy for Reference Material. In WEBOPAC message appears as "For reference only" for books having lending policy code which are part of this string.	RF	Enter (Type
Lending Policy Codes for Digital Material	Lending Policy for Online Material.	DG	Enter (Type)

- Select **Circulation Borrower ID** list item and enter the following values.

Option	Description	Value	Action
Default Membership End Date	Specify Default Membership End Date	31-Dec-2050	Select

.

Tutorial 1.2 Defining type of material in the library

> **iSLIM**->**UTL** Tab ->**Item Types** Button

- Following item types are available when you install iSLIM.

Code	Type Description	Default LP Code
3	Preprints	01
4	Reprints	01
9	Periodical	01
A	Article	01
B	Book	01
J	Journal Article	01
L	Loose Issue	01
V	Bound Volume	01
X	See Reference	01
Z	See Also Reference	01
F	CD	01

You cannot remove the item types with **Item Code** 3, 4, B, A and J.

To add a new item type

- Click icon ▯ to **Add New** and enter the following:

    - Item code = K

    - Item Description = Video Cassettes

    - Default LP Code = General

    - (Whenever you create a record for a new Video Cassettes, iSLIM assigns lending policy code as 01 to this record.)

- Click **Submit**. A new row will be added to the list of Item types.

Tutorial 1.3 Maintaining Currencies

> **iSLIM**->**UTL** Tab ->**Currencies** Button

- Select the first row in the grid i.e. the row with currency code=000, Description as Rs. Click Update. The program does not allow editing, updating of this currency record.

- To add a new currency code, click icon ▯ and enter the following information in the **Details** panel:

    - Code = E01

    - Description = Euro

    - Conversion rate = 29.00

    - Sign = EU

- Click **Submit**. You should see new row added to the list of currencies.

- To delete a currency record, select a desired row and Click Icon 🗑.

Tutorial 1.4 Creating supplier record

> **iSLIM**->**UTL** Tab **->Suppliers** Button

- Click icon + to Add New Record.

- Enter the Information as per table below:

Field	Value	Action
Type	Supplier	Select
Code	S001	Type
Name	Savlon Suppliers	Type
Short Name	SAV	Type

- Click **Submit**. You should see new row added to the list of suppliers with supplier code S001.

- Select the row with Code = S001, Change the Short Name to SAVL.

- Click **Save**. See whether the changes are reflected in the grid.

- In order to find supplier record, use text boxes below column heading.

- Ex. Enter S001 in text box below the column 'Code' then press Enter Key. You are now at the row with Party Code S001. Now click on any other random record. Similarly find by name using the in text box below the column 'Name'.

- Click **Address** shown in the **right** pane. **iSLIM Addresses of Suppliers** dialogue will appear. Click **Add** on the **Record** menu.

- Check Change of address, Payment and Subscription from the options. Click **Do Add**.

- Enter the following information in the **ISLIM Addresses of Suppliers** dialog.

Field	Value	Action
Contact	Mr. John Smith	Type
Address	3, Konark Nagar Pillar Street	Type
City	Pune	Type
Pin	411022	Type
Telephones	389765	Type
Email	sav@sav.com	Type

- Click **Save** on the **Records** menu. Confirm that 3 records with same addresses are added**.**

Add a Publisher

Field	Value	Action
Type	Publisher	Select
Code	C0001	Type
Name	Cyber Media (India) Limited.	Type
Short Name	CML	Type
Foreign / Local	L	Select

- Click **Save**.

- Enter the address as '810, Meghdoot,, New Delhi, 110019' using the steps given earlier

Tutorial 1.5 Define Borrower categories.

> **iSLIM** ->**UTL** Tab **-> Masters** Button

- Select **Borrower Categories** from the list and click **add new** record button.

- Enter VF as Code and Visiting Faculty as Description.

- Click **Submit**.

- Repeat the above procedure for Code as ST and Description as Student.

- Close the application.

Tutorial 1.6   Create a new borrower of staff and student category (One Each)

> **iSLIM** ->**UTL** Tab -> **Borrowers** Button

- Click icon ☐ to Add New Record.

- **iSLIM Add New Borrower** dialog will be displayed. Enter the following values:

Field	Value	Action
BorrowerID	A001	Type
First Name	Ganesh	Type
Name/ Last Name	Joshi	Type
Priority	9	Select
Category	Staff	Select
Membership Start	01-Mar-2016	Select
Membership End	31-Dec-2020	Select

- Click **Save & Close.** In the **Details** tab enter the following information.

Field	Value	Action
Salutation	Mr. Ganesh Joshi	Type
Organization	ABC	Type
Department	Computer Science	Select

- Click **Address** button. In the **Address1** tab enter the following information.

Field	Value	Action
Address	Kubera Kothrud, Pune 411038	Type
City	Pune	Type
State	Maharashtra	Type
Pin	411038	Type
Fax	5281066	Type
Email	joshiganesh@abc.co.in	Type

- Click **Address2** Tab and enter the following values:

Field	Value	Action
Address	100/22, Churney Road Mumbai 400 005	Type
City	Mumbai	Type
State	Maharashtra	Type
Pin	400 005	Type

- Click **Deposit and Fees** button and iSLIM Deposit and Fees dialog appears.

- Click **Add New** button and enter the following information.

Field	Value	Action
Payment Type	Security Deposit	Select
Amount	1000	Type
Receipt No.	101	Type
Date	01-Mar-2016	Select

Assigning the photograph to the borrower record

- **Prerequisite:** You should have some image files (GIFs, bitmaps, JPEGs) preferably the scanned photograph files of individuals.

- Click the **… button** on the **Details** tab. Select an image file.

- Click **Done** Button. Verify that the image in the file appears in that space.

- Click **Save**.

Note: If your computer has a Webcam then you can use that to click pictures of borrowers

- Please refer to the following table and add some more borrowers:

Field	Values	Values	Values
BorrowerID	A002	A003	A004
Category	Staff	Staff	Staff
Priority	9	9	9
Password	AB002	AB003	AB004
Name	Boon	Dave	Mr.Smith Scott
Membership Begins On	01-Mar-2016	01-Mar-2016	01-Mar-2016
Ends On	31-Dec-2020	31-Dec-2020	31-Dec-2020
First Name	Jane	Kapil	
Salutation	Mrs. Jane Boon	Mr. Kapil Dave	Mr.Smith Scott
Organization	Algorhythms	ABC Consultants	Chinar Ltd.
Department	IT	IT	IT
Phone	5284765	5282225	5281292
Ext	32	32	32
Fax	5281066	5281066	5281066
Email	Janeboon@algo.co.in	Kapldave@algo.co.in	Smitscot@algo.co.in
Deposit	1000	0	0
Receipt No.	102	-	-
Date	01/01/2002	-	-
Address	100/22, Karve Street	Yashada Soc., Paud Road	21, Yerwada Road
City	Pune	Pune	Pune
State	Maharashtra	Maharashtra	Maharashtra
PinCode	411032	411021	411050

- In order to find a borrower record, use text boxes below column headings.
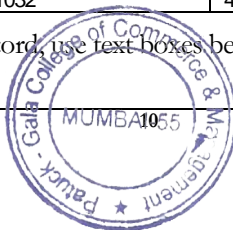
- Ex. Enter A003 in text box below the column 'Borrower ID' then press Enter Key. You are now at the row with Borrower DI A003. Now click on any other random record. Similarly find by Last Name using the in text box below the column 'Last Name'.

Delete a borrower record

- Add a borrower with the following values: (Perform the steps specified in <u>Add A Borrower</u>)

| Field	Value	Action
BorrowerID	A005	Type
Category	Staff	Select
Priority	9	Select
Name	Anthony	Type

- Find the borrower A005.

- Click icon 🗑 to Delete.

   - **Note: Deletion of a borrower record to whom some items are issued, or fine is due is not allowed.**

Tutorial 1.7 Setting rights for operators in iSLIM.

- Do this in two steps:

1. Define User Roles and Operations

2. Add User and Role

   1. **iSLIM** ->**UTL** Tab **-> Roles** Button.

- iSLIM Roles and Operations dialog will appear.

- Click icon + to **Add New Record** under the **Roles** Panel. Then **Add record** dialog will appear.

- Enter 'Catalogue Entry' as a name and click **Submit** button.

- Select 'Catalogue Entry' from the grid of **Roles** Panel.
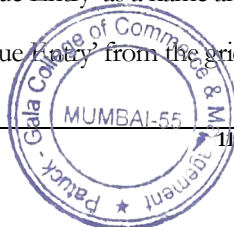
- Select 'CAT' from the grid of **Modules** Panel.

- Click icon ✓ Button to give permissions to all application.

2. **iSLIM** ->**UTL** Tab **-> Users** Button.

- iSLIM Users and Roles dialog will appear.

- Click icon + to **Add New User** under the **Operators** Panel. Then **Add New User** dialog will appear.

- Add your Name, Password, Security Question, Answer and click Save.

- Select your name from the grid of **Operators** panel.

- Select 'Catalogue Entry' from the grid of **User Roles** Panel.

- Click icon 🔧 to Toggle rules to the user.

- Logoff Admin login from Admin Manu –> Logout. Then iSLIM Log in dialog appear.

- Enter your name and password and click Login.

- Notice that only those operations selected by the user are getting displayed.

Session 3: Acquisition System

Acquisition functions covered in this session:

- Monitoring process of acquisition from proposed items to bill processing.

- Budget application: Maintaining different budget heads and funds monitoring.

- Entering different types of documents such as Purchase order, bill.

- Different documents

- Order to the supplier

- Supplier bill

- Parts of a document

- Document Header: Document number / Date/ Supplier / Reference

- Document lines: List of Items with amount calculation for each item

- Document footer: Total amount

- Entering item on a document

- Pickup item from list of items proposed

- Pickup item from earlier document. (Example, items on order are referred while making a bill document)

- Creating new item under acquisition on a document

- Bill processing details: Chq/ DD details and allotting an accession number to the item.

- Reports

- Setting Report parameters.

- Reporting records which match the desired selection criteria.

- Print reports.

- View Status of items under acquisition

| Tutorial | Create a purchase order and generate purchase order letter, Create the purchase bill, process it for payment & accession the book/s, Print accession register. |

Session 4: Acquisition System (Tutorial)

Tutorial 4.1 Creating Budgets

Add a new Budget Head

- **iSLIM** -> **Utilities** Tab -> **BudgetHead** Button.

- Click Add New.

- Enter the data as given below in Details Grid-

Field	Value	Action
Account Code	007	Type
Account Name	UGC/PG	Type
Note	PG/UGC	Type

- Click **Submit** button.

Add a new Budget

- **iSLIM** -> **Utilities** Tab -> **Budgets** Button.

- **iSLIM Budgets** window will appears.

- Click Add New.

- Enter the data as given below in Details grid

Field	Value	Action
Account Code	007	Pick [...] (Select record with account code **007** & click on **Pick** button)
Account Name	UGC/PG	Selected by default
Budget Exp	60000	Type

- Click **Submit** button.

Tutorial 4.2   Creating new Proposal

iSLIM -> **Acquisition** Tab -> **Proposals**.

Add a new Proposal

- Click New

- Add Proposal dialog appears.

- Enter the data as given below:

Field	Value	Action
Author	Eric Brierly, Paul Sanna, Anthony Prince	Type
Title	Visual Basic 6- How-to Request	Type

- Click **Save** and verify that the item is added to the List of Proposal.

Tutorial 4.2   Creating Purchase order Document

iSLIM -> **Acquisition** Tab -> **Purchase Order** Button.

Add a new Purchase Order document

- Click New.

- Add new dialog appears.

- Enter document number=00001

- Pick up Supplier = S001 and select Currency as Rs.

- Click **Add**.

- To add a line item from existing proposed items, click **Add from proposed items**.

- Pick a proposed item window will appear.

- Select proposal- Visual Basic 6- How-to Request and click **Add.** Verify that item is added to the List of Line Items.

Note: **You can enter other documents such as Bill in the similar manner. Please read help to refer item from previously existing document or from proposed items.**

- Add pricing details to the line item

- Select line item and click **Edit line Item**:

- Edit Line Item Dialog will open

- Enter the following

    - Currency =US$

    - Pick up budget UGC/PG for item.

- Unit price=20. Click **Calc**.

- Click **Save** on the line items.

    - Generate letter

    - Select the document from the list and click required Letter from Letters Menu.

Session 5: Cataloguing System

- Introduction to Cataloguing system

- Catalogue Browser (Authority Editor)

- Different Catalogues and selecting a catalogue

- View Circulation status

- Selecting items for reports

- Searching an item by accession number in the catalogue browser

- Card Preparation

- Add/Edit an item in the library.

- Simple Card (Basic Description of the Book).

- Detail card with Bibliographic Data.

- Inserting Occurrences

- Classification Number and Subject Description.

- Creating Added entries.

- Allotting Keywords.

- Add More Copies of same Book.

- Creating Analytical entries.

- Linking Multimedia Files with Cards.

- Display List – List of recent Library Items. (Titles Browser)

- Print Catalogue- Title wise / Author wise.

- Generating the bibliographic information.

- Viewing and filtering the bibliographic information in columnar format.

- Defining new Subject and associating it with the Subject class number

| Tutorial | Add a new item in the library collection, simple Edit / Detail Edit for this card, referring authority files, adding one more copy of the same title. |

Session 6: Cataloguing System (Tutorial)

Tutorial 6.1   Add a new item in the library collection

- SLIM provides Authority control on most of the bibliographic attributes. This allows you to refer to list of values so far entered for that attribute and pick up an existing value from the list if applicable. This action is referred as PickFAF (Pick From Authority File) in this manual.

> **iSLIM**->**Cataloguing** Tab ->**New Item** Button.

- iSLIM New Item In Library dialog will appear..

- Enter data as per the table below.

Field	Value	Action
Author	Eric Brierly, Paul Sanna, Anthony Prince	Type/ PickFAF
Title	Visual Basic 6 How-to	Type
Title main entry	True	Check
Accession #	A00097 (or any number not used already)	Select from the Accession Series.
Accession Date	05 Jun 2002	Select
Copies and Parts	3 and 1 respectively.	Type
Edit Bibliography	True	Check

- Click Add.

Note: To add multiple items in one go, click **Clear** button and add next item.

- If the Edit Bibliography check box is checked the **iSLIM Edit Card** page will be displayed in a separate tab. In the Bibliographic data tab enter the following information.

Field	Value	Action
Other Title Information	The all new definitive Visual Basic Problem Solver	Type
Publisher	TechMedia	Type/ PickFAF
Year Of Publication	1994	Type
Extent Of The item	Xvi + 690p.	Type
ISBN / ISSN	81-7635-053-2	Type
Place of Publication	New Delhi	Type
Qualification	Pb	Type
Classification Number	005.42 VB	Type/PickFAF
Series title	How-To	Type / PickFAF
Key Words	Visual Basic, Windows Programming, ActiveX	Type / pick Multiple keywords from the authority file.
Summary / Abstract Note	This book supplies solutions to the most troubling Visual Basic issues from how to build Automation servers to creating compound objects.	Type

- Click **Accession Register** tab. Enter the following details.

Field	Value	Action
Price	375	Type
Currency	Rs.	Pick
Discount	10	Type

- Click the **Calc** to calculate the total amount. Click **Save**.

Data Entry Guidelines:

1. **Preparation: Before doing the data entry, please follow the steps given below**.
    -   Define type of material in the library.
    -   Define mostly used Subject Class Numbers and their subject description
    -   Create Supplier records
    -   Set the calendar by marking the holidays
    -   Create Currency records.
    -   Customize Slim as per your requirement by setting preferences. Use option UTL-> Libraries to enter the library information such as name of the library, address and name of the librarian.
    -   Define codes such as Lending Policy Codes and Borrower Categories.

2. **Sources for creating Books Records**
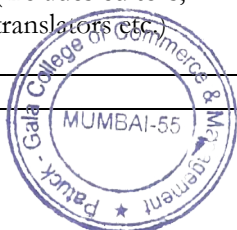   The success of Library automation depends on the quality of data entered in the system.
    Books data can be entered from looking at actual books or various manual records maintained in the library. Following are some of the sources for creating books records.
    1. Actual books
    2. Accession register
    3. Shelving cards (5 x 3 cards)

3. **Information considered for creating books records :**
    Enter information as it is available on the title page of the book. **We do not recommend entering data in capital letters.**

Title	Enter title as per the book's Title page. Do not remove "A", "An" and "The". You can remove these articles at the time of creating access points.	Ex. The Text Book of Anatomy
Sub title		
Authors (maximum 4) (includes editors, translators etc.)	Enter author's name as per the Title page. You can create access point as <lastname, firstname>.	Dr. Jayant Narlikar

	Suffix role wherever required in []	John Smith [ed.]
Edition statement	If it is first edition, then leave the value blank. Else enter with suffix ed.	2nd ed. 4th ed.
Extent of the item	Enter number of pages with suffix p	325p iv, 546p
Classification number & Author Mark	Please enter class number along with its subject description in subject master and then use pick feature Author Mark is as per your spine label format	25
Imprint (Publication details)	Use authority for entering Place of publication and name of publisher. Date of publication is Year	New Delhi Oxford press 1978
Supplier details	Pick supplier from supplier master. For old books, associate X001 value as backdated supplier	S005 Popular Book House
Copies	Use this field if multiple copies are purchased under one bill document	50
Terms of availability	Enter price printed on the book with other details	US$ 65 For sale in Indian subcontinent only
Price	Enter price in Accession register with original currency and conversion rate	65 USD

4. **Authority:**
   - Always pick the values from Authority files. If you do not pickup values from Authority files it leads to spelling mistakes or variations in spellings for same entity, due to which you will have multiple entries for the same access point.

5. **Accession Register:**
   - Verify the data entry in accession register.

6. Reports:
   - Generate Data Entry Details Report for Verification of data entry periodically.

7. Backups:
   - Take daily backup on any of the machines other than the server. Copy these backup folders on the CD or any other secondary storage media on every Saturday.

Session 7: Circulation system

- iSLIM circulation module governs the issue/return transactions for library items. This session covers:

- Rules

  - Initialize the rules

  - Set the rules for the different Categories and Lending policies

  - Delete a rule

  - Delete all rules

  - Find a rule

  - Navigate through the rules

- Counter Operations (Issue, Return, Reserve, Cancel Reservation, Etc.).

  - Finding an item using accession number

  - Setting a Borrower session.

  - Finding loans pertaining to a borrower

- Circulation Reports.

  - Specifying report parameters.

  - Loans Borrower Wise

  - Log of transactions

- Overdue emails

- Inventory Stock Taking – Marking book status as missing / binding needed / lost etc.

Tutorial	Define circulation rules, Make Transactions ISSUE/RETURN, Print reports for - List of Overdue books, List of Transactions during a day (Log Book) / Books on loans, Overdue notice email, Stock Taking. .

Session 8 – Circulation System Tutorials

Tutorial 8.2 Define circulation rules

- Book with circulation code 01 can be borrowed by a Visiting staff member for 30 days without fine and by a student for 4 days with 2Rs. fine per day.

> **iSLIM** -> **CRC** Tab -> **Lending Policy** Button

- **iSLIM Lending Policy** dialog will appear.

- The list displayed should be empty if you have never done this operation before.

- Click Initialize Additional rules.

- The **Rules** list containing the combinations of Borrower Categories and Lending Policy codes will be displayed.

- For example-

Category	Lending Policy	Days	Items	Fine	Reissues
Student	General	0	1	0	2
Student	Book Bank	1	0	0	2
Student	Reference Books	1	0	0	2
Visiting Staff	General	0	1	0	2
Visiting Staff	Book Bank	1	0	0	2
Visiting Staff	Reference Books	1	0	0	2

Set the rules for the different Categories and Lending policies

- Select row with **Category** as Student and **LP Code** as General and set the values as shown below.

Field	Value	Action
Loan Days	8	Select
Limit on Loans	2	Select
Fine / Day	1.00	Type
Reissues	1	Select

- Click **Submit** to update and refresh the grid. Select row with Category as Student and Lending Policy as 01 and check whether the changed values are reflected in the grid.

Generating ID Card

> **iSLIM** -> **CRC** Tab -> **View Sets of Borrowers** Button.

- iSLIM View Set of Borrowers dialog will appear.

- Click Add new Record

- **Add record** dialog will appear.

- Enter name as Borrowers ID Card. Click Submit.

- Click Add borrower to Set.

- **Borrowers** pick up dialog will appear

- Select one by one borrower record to add in set**.**

- Select **ID card** from print drop down in printing frame

- Click **Add Job**. Borrowers ID card job will add in Job Scheduler.

- To generate Borrower ID card report click **Jobs**

- **Jobs** Dialog will appear. Select Borrower ID cards report from task list and click **view result.**

Tutorial 8.4   Make Transactions ISSUE / RETURN.

iSLIM->**Circulation** Tab->**I/R** Button.

- **iSLIM Issue/Return** dialog will appear.

- In the **left pane** enter / pick the borrower ID AB003. The details of **AB003** will be displayed in the **Borrower** pane.

- In the right pane enter 000098 as **Accession #**.

- Check with bar code scanner if Bar code scanner is attached.

- Click in the textbox provided for **Title** or press **Tab** key.

- Check whether the following values are displayed after specifying Accession number:

Field	Value
Title	The Design of the Unix Operating System
Author	Bach, Maurice J.
Class #	658
Delay	0
Status	On Shelf
Call No.	
Claims	0
Issued To	
CpSpec	

- Click **Issue** to issue the item.

- The item gets issued to Borrower AB003.

- Check the following in the **Loans** Tab, after issuing the item:

Field	Value
Item ID	000098
Carrel	Uncheck
Lent On	<Today's Date>
Due On	<Today's Date> + 8
Title	The Design of the Unix Operating System
Author	Bach, Maurice J.
Recalled	Uncheck

- Close ISLIM Issue/Return dialog.

    - Repeat all the above steps i.e. Issue items with the following values: Borrower ID: **AB002** and Accession Numbers: **000095, 000099**.

    - Perform an Issue operation by changing system date

- Change the Transaction date as <Today's Date - 10. >

- Perform the steps specified in the tutorial **Issue an Item** with the following values:

Field	Value
BorrowerID	AB001
AccNum	000154
Lent On	<Today's Date>-10
Due On	<Today's Date> -2
Title	An Introduction to Database system
Author	Date, C. J.
Claims	0
Required On	–
Recalled	No

- Close ISLIM Issue/Return Operations dialog.

- Change the transaction date back to <TodaysDate>.

- Start **Issue/Return** application again.

- Enter BorrowerID as **AB001 .** Check the following:

Field	Value
Issue Date	< Today's Date > - 10
Return Date	< Today's Date > - 2

- Perform Issue transactions referring to the steps specified in <u>Perform Issue operations by changing system date</u>, with following values:

Field	Value
BorrowerID	AB003
AccNum	022552

- change the Transaction date as <TodaysDate>.

- **Return** the item with AccNum as 022552

- Verify that the Borrower has a fine amount of 2.00 Rs.

- Start **iSLIM Issue Return** and enter / pick the borrower ID AB003.

- Click **Fine** tab. The fine amount should be 2.00 Rs.

- Close iSLIM Issue Return dialog.

    - View the list of loans associated with the borrower

- Start **iSLIM Issue/Return** Operations.

- Pick the borrower with Borrower ID as **AB003**.

- In **Loans** Tab, Check whether the details of borrowed items are displayed.

    - Issue to a borrower having fine (with *Fine Stops Issue* as True)

    - (Select UTL->Preferences & settings. Select Circulation from drop down list and set value of setting: *Fine Stops Issue* as True.)

- Return the item with accession number 022552 issued to AB003

- Start iSLIM Issue/Return Operations .

- Enter BorrowerID as **AB001**. Accession number 022552

- Click **Issue.**

- A message appears "Can't issue. Fine is due." Click **Ok** .

- Verify that the item is not issued to the borrower.

    - (Select UTL->Preferences & settings. Select Circulation from drop down list and set value of setting: *Fine Stops Issue* as False.)

    - Follow the steps given for Issue to a borrower having fine and verify that the item is issued to the borrower.

    - Return an Item

- Start iSLIM Issue/Return Operations dialog.

- Pick Up the borrower with Borrower ID as **AB003**.

- In **Loans** List, Check whether the details of borrowed item are displayed.

- Click **Return.**

- Check whether the item is returned (i.e. it is removed from the loans list).

    - Settings for Ask Confirmation for every transaction

- Start iSLIM Issue/Return Operations dialog.

- Click Options   .

- Check Ask Confirmation for every transaction.

- Perform the steps specified in **Issue an item**

- Click **Issue**. Issue dialog will appear.

- Verify the following:

Field	Value
Accession	700097
BorrowerID	AB001
Return Due Date	<Current Date> + 4

- Click **Ok** .

- Check whether the item appears in the **Loans** List of the borrower.

- Do **Return** operation for the borrower AB001 and accession 700097.

Reserve an Item- Title Based Reservation

- Start iSLIM Issue/Return Operations dialog.

- Enter Borrower ID as **AB003**.

- Specify Accession Number as 000012.

- Click **Reserve**

- The reservation operation should take place without failure.

Tutorial 8.5   Print reports from the circulation system.

Print reports:

- Loans accession number wise.

- Overdue loans.

- Daily log: In the order of type of transaction.

iSLIM -> **CAT** Tab -> **Reports**

- iSLIM Reports dialog will appears showing the list of reports module wise available in iSLIM.

- Select **circulation** -> Loans Accession Number Wise Report. The following selection tabs are enabled.

Tabs Enabled	Description
Borrowers	Specify a range of borrower IDs. Circulation or borrower records with IDs within this range will get selected for the report.
Categories	Select all or selected Borrower Category values for the report.
Accession#	Specify a range of accession numbers. Circulation or borrower records with accession numbers within this range will get selected for the report.
Lending Policy	Records with any of the selected lending policies get selected for the report
Department	Specify range of Borrower's Department name. The Borrower records with Departments falling within this range will be included in the report.

- On the **Accession** tab uncheck **Include All** option**.** Specify the range of **accession numbers** as lower limit = 000012 and Upper limit =000012.

- Click **PDF**.

- Change the **accession number** range to lower limit = 000012 and Upper Limit = 000040.

- Click **PDF**.

Daily log: Ordered by Types of Transaction.

| Tabs Enabled	Description
Borrowers	Specify a range of borrower IDs. Circulation or borrower records with IDs within this range will get selected for the report.
Categories	Select borrower category values. Records with any of the selected values get selected for the report.
Department	Specify a range of Borrower's Department Names. The Borrower records with Departments falling within this range will be included in the report.
Item Types	Select types of items. Records with any of the selected types get selected for the report.
TranDates	Specify a range of transaction dates. Records with dates falling within this range will get selected for the report.
Tran Types	Transaction records with the selected types will get selected for the report.

- On the **Tran Types** tab, uncheck **Include All** option**.**

- From the list, check following transaction types

  Issue, Fine Due and Lost

- Click **PDF**.

Tutorial 8.6   Overdue emails

iSLIM -> **CRC** Tab -> **Letters** Button

- Prerequisite

- Add three new items with Accession Numbers A00001, A00002 and A00003. For these items specify the Title and Author of your choice.

- Add three new borrowers with ids as OD001, OD002, and OD0003. Specify the category as Staff and Names of your choice. Specify the Membership beginning date as 1/1/2002 and the membership ending date as 31/12/2050.

- Change the system date (Or Just the transaction Date) to Current date -30 and issue book A00001 to OD001.

- Change the system date (Or Just the transaction Date) to Current date -15 and issue book A00002 to OD002.
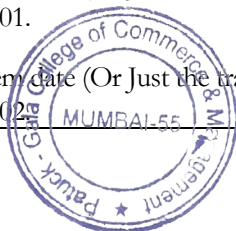
- Change the system date (Or Just the transaction Date) to Current date -8 and issue book A00003 to OD003.

    - Change the Message Specs

    - iSLIM Letters dialog will appears.

- Borrower list is displayed in the left pane and the overdue loans for the selected borrower are displayed in the right pane.

- To change the message specs, click **overdue email message specifications**.

- Overdue email message specifications dialog appears.

- Select Advanced Reminder from Message Description list.

- Write "Advance reminder" in the Email subject and write the message in the **Message Text** box.

- Click **save**.

- Close the dialog.

    - Generate Emails

- The **list of borrower** should show the record for OD003 and **Overdue Loans** should show record with accession number A00003.

- Select record with borrower ID OD003 and click **Generate E-mail**.

Note: If "Can not send the email, email address is not available for borrower – OD003" error is displayed, please follow the steps given below.

- Click Ok.

- Open **ISLIM Borrowers** application. Specify email address for the borrower with borrower ID OD003.

- Again try to generate the email.

Tutorial 8.7. Physical Inventory

> **iSLIM** -> **CRC** Tab - > **Physical Stock Checking**.

- iSLIM Physical Stock Verification dialog will appears.

- List of Class Numbers is displayed in the **left** pane.

- Select a Class Number. The records for that class number will be displayed in the **right** pane.

- Select **New Check**. **Reset Physical Inventory Mark** dialog will appear. Set the values as per the following table.

Field	Value	Action
Mark Character	#	Type
Stock verification date	<Today's date>	Select
Remark /Reference	Reference	Type
Count of verified item	0	Confirm

- Click **Reset** . Click **Yes** on the confirmation box.

- Select Class Number of your choice. Confirm that the **Circ_Status** is On Shelf and **Inventory_Status** is Ok. To change the Inventory status to withdrawn, click **Change Inventory Status.**

- Click **Toggle Inventory Mark.** You will notice that the **Mark** column in the grid shows #.

Note: You cannot change the inventory status for the items having Circ Status as Issued. However, you can mark all issued items as OK using the **Mark All Issued/ Transferred items** button

Find And Mark

- Click **Find**.

- Specify the Accession Number V00002 select check box **Mark** and click **Find.**   .
  See that the mark column for record with accession number V00002 shows #.

Reports

- Select iSLIM-> CRC Tab-> Stock Taking Report

- iSLIM Stock taking Report dialog will appear.

- Click **Report**.

- Change the verification status to **Unmarked**. Uncheck the **Select all** Option for **Inventory Status**. Select **Binding needed** from the list of Inventory Status and click **Report** . Close the report.

Session 9: Serials Control System.

- Add a Journal

- Add journal records with all types of Status and ID Types

- Add journal records with different types of Frequency and Delivery Modes

- Find a journal record.

- Subscription History

- Multiple Addresses for a Journal

- Make a Catalogue Card of Journal

- Link a journal record to a previously existing catalogue card

- Unlink a catalogue card from a journal record.

- Delete a Journal.

- Generate Loose Issue Schedule

- Maintain details of individual issues

- Edit loose issue record

- Enter received date of an issue

- Journal status modification

- Received of a duplicate issue

- Update receipt status of all issues

- Create Article Entry in an issue

- Create catalogue entry for an issue

- Delete current loose issue record

- Adding arrival Schedules to an existing schedule

Document Entry

- Binding orders.

- Subscription.

- Letters

- Report: Budget wise Journals.

Tutorial	Create A Journal, Enter subscription History, Enter Multiple Addresses for a Journal, Making Journal card, Loose Issues: Arrival Schedule, Article Indexing.

Session 10 – Serial Control System (Tutorial)

Tutorial 10.2 Create a Journal entry in the Journal Master

> **iSLIM** -> **SRL** Tab -> **Journals** Button.

- Click **New** to Add New Journal.

- iSLIM Add a Journal dialog appears.

- Enter the following values.

Field	Value	Action
Item Code	J001	Type
Title	Sports India	Type
Abbreviated Title	SI	Type
ID/ISSN	2394-1685	Type
Subject Class	008	Type
Remark	Regular Journal	Type

- Click **Add**.

- The journal will be added to the Journals list, which is displayed in the **left** pane.

- The details of the journal will be displayed in the **right** pane.

- Select the **Journal** tab and enter following information.

Field	Value	Action
Approval	Approved	Select from the Status List
ID Type	Journals	Select from the ID Type List
Dept	Social Science	Pick from Department.
Location	R1-R2	Pick from Locations.
Publisher	Inter-India Publications	Pick from Supplier Master(If such Publisher doesn't exist, add one)
Country	India	Select from the Countries List
Delivery	Local	Select from the Delivery Mode List
Frequency	Monthly	Select from the Frequency List
Wait Days	4	Type
Agent	Popular Book House	Pick from Supplier (If such Agent doesn't exist, add one)
Subscription Type	Subscription	Select from Subscription Type List
Budget	Journals	Pick from Budget Master (If such Budget doesn't exist, add one)

- Click **Save**.

- Click **Users** tab.

- Enter the name of the Proposer & Approver (both are basically Borrowers of the Library) of your choice, in the Name boxes within the frames Proposal & Approval. Also enter Reference of your choice.

- Pick up Borrower ID of your choice for Recipient.

- Click **Save**.

  - Add few more journal records with following values.

Code	Title	Status	IdType	Frequency	Delivery	Subject
J002	PC Magazine	Ceased	Journals	Semi-Monthly	Local	009
J003	India Today	Discontinued	Daily/Weekly	Daily	Local	009
J004	Business India	Proposed	NewsLetter	Semi-Weekly	Local	009
C005	Computer Today	Rejected	Reports	Monthly	Local	009
H001	Harward Business	Approved	Journals	Monthly	Air-mail	009

Tutorial 10.3 Enter Subscription History

- Select journal record **Sports India**.

- Click Subscription tab.

- Click icon ☐ to Add Subscription History.

- Click icon ✎ to Edit/View Subscription

- Enter the following values.

Field	Value	Action
Supplier	Popular Book House	Pick
Subscription#	S19800	Type
Forwarding Proof	00001	Type
Starts	01/01/2016	Select
Volume	31	Type
Issue	1	Type
Ends	31/12/2016	Select
Volume	31	Type
Issue	12	Type
Total Issues	12	Type
Amount	3000	Type
Currency	Rs	Select
Conv. Rate	1	-
Rs. Amount	3000	Type

- Click **Set Current**. (To make your record as Current Subscription Record).

- Click icon ✎ then Click **Update**.

- Check whether the following values are present in the grid provided in the **Subscription** tab.

Field	Value	Action
From Date	01/01/2016	Select
To Date	31/12/2016	Select
Subscription	3000	Type
Currency	000	Select
Conversion Rate	1	-
Rs. Subscription Amount	3000	-

Tutorial 10.4 Multiple Addresses for a Journal

- Select Journal Record **Sports India**.

- Click Addresses.

- iSLIM Addresses for Journals dialog appears.

- Click icon ☐ to **Add New**.

- Select Address Types to Add dialog appears.

- Check (Tick) all the options and click **Do Add**.

- Enter the following values:

Field	Value	Action
Contact	Mr. Tom Anthony	Type
Address	Park Street	Type
City	Skokie	Type
Country	USA	Type
Pin/Zip	1263	Type
Email	SportsIndia@pn3.com	Type

- Click **Save.**

- Confirmation windows come up, Click **Yes**.

- Navigate through all types of addresses.

- Close iSLIM Addresses for Journals dialog.

Tutorial 10. 5 Make a Catalogue Card of Journal

> **Prerequisite:** Set Item Type for Bound Volume **in Item type** option

- Select Journal Record `Sports India`.

- Select **Create** from **Catalog Entry** List.

- A Catalog ID will be generated under the **Journals** tab.

- Start **Title Browser** and search the Catalogue Card prepared in Title Catalogue.

   Note: If you have generated cards for Bound Volumes prior to creating Journals record then you can link this card to the corresponding Journal record in the Journal master.

Tutorial 10.6 Journal Loose Issues

- Generate Loose Issue Schedule

   o Select the Journal Record `Sports India`.

   o Select **Subscription** Tab.

   o Click icon ✎ to **Edit**.

   o iSLIM Edit/View Subscription dialog will appear.

   o Verify following subscription details:

Field	Value	Action
Starts	01/01/2016	Select
Volume	31	Type
Issue	1	Type
Ends	31/12/2016	Select
Volume	31	Type
Issue	12	Type
Total Issues	12	Type

- Click **Schedule** button.

- The schedule will be displayed at the bottom of the **Issue** tab. According to the Current Date (System Date) the Arrival Status is either Expected or Not Received etc.

    - Mark Loose Issue as Received

- Select the Journal Record `Sports India`.

- Select issue record with Issue Number as `1` and Volume Number as `31` from the schedule. This issue record will have status as 'Not Received'

- Click **Mark as Received** from issue menu ☼ to change journal status **Received**.

- Check whether the Receipt date after marking received is today's date.

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Tutorial 10.8 Article Indexing

- Select issue record with Issue Number as 1 and Volume Number as 31 from the list. (Status - Received).

- Click **Articles** from issue menu ☼

- iSLIM Article Index dialog appears.

- Enter the values as mentioned in the following table:

Field	Value	Action
Author	Ben Smith	Type
Title	What is speed?	Type
Class Number	008	Type
Author Mark	SMI	Type
Pages	230 - 232p.	Type
Keywords	Speed	Type

- Click **Add**.

- Open Cat->**Title Browser** & find Author Catalogue entry for `Ben Smith.`

- The Item type for this Catalogue entry should be **Journal Article**.

- Search the article using Title 'What is speed' in Cat-> **Title Browser**.

Session 11 – iOPAC.

- iOPAC

- Using iOPAC

- Searching Through Different Catalogues.

- Making Simple Queries.

- Making Boolean Queries.

** ** ** ** ** ** ** ** ** ** ** ** **

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