System Manual for ML7E

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1. Introduction

POTA Technologies Ltd. has been established in 1992, and we have more than 20 years experience in producing software packages and customer design.

Our Team

The designers have been trained their skills and knowledge in the U.S., UK, and Mainland China with related degrees such as Computer Science, Marketing, Publishing etc. Every designer has more than 10 years experience.

Our aim is to provide you - wherever you are and in whatever kind of division- with the sort of friendly products and personal support that you need.

Our Product

We are pleased to introduce you the POTA Media Library Management System (ML7E). As small library automation software, ML7E can be used for library administration, circulation, and member management. It is easy to build up your own library information database with the help of ISBN auto-cataloging & import item/book, member records from Excel. All the loan/return records, reports, statistics are able to export to Excel format. With POTA (ML7E), you can easily manage your library.

Understanding the Trial Period

The free trial Period for ML7E is up to 9 months. After the free trial, you can continue your service by buying the full version at POTA Software's website (http://en.potasoft.com/). Your free trial countdown will begin after the software being installed and launched. You are able to check your free trial count down at the

Menu > Help >About the POTA Media Library Management

Get Helped

To view this manual, click
Menu > Help > Manual Download

Or visit our website (http://en.potasoft.com/) and contact us.
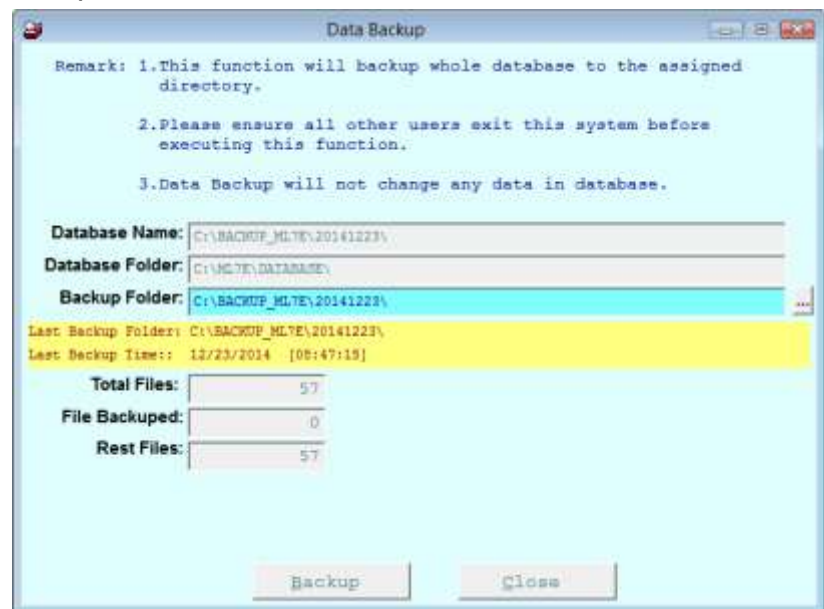
2. Data administration

This chapter will demonstrate how to backup, restore, and re-index your database in the POTA Media Library System.

Back Up Your Data

Where to:

Tools > Data backup

We suggest you backup your database regularly. Before executing the backup process, please ensure all users exit this system. Simply assign a directory or use default directory (C:\BACKUP_ML7E\20141223) in the Data Backup window. Click on the "Backup" button and start to back up your database.

Restore Your Data

Where to:

Tools > Restore Data

This function
will restore
your whole
database from
the assigned
backup
directory.
Before
executing
restore your
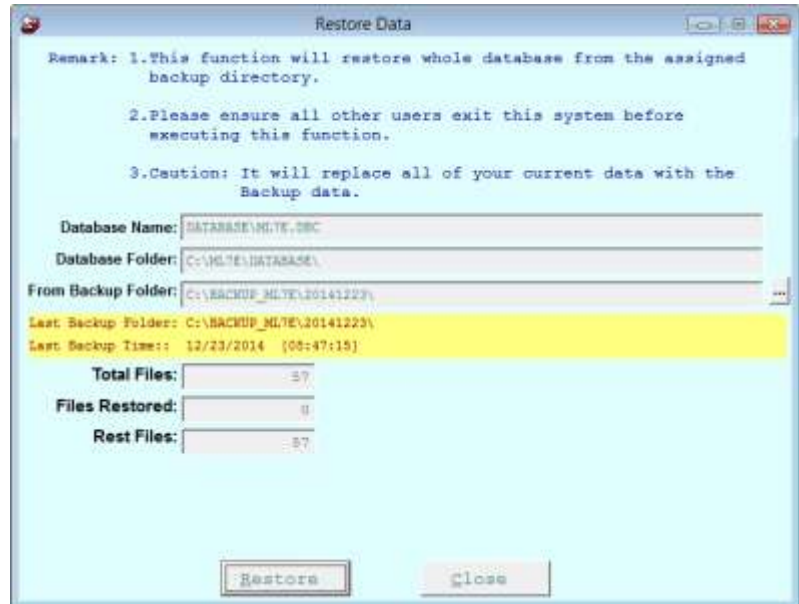
database, please ensure all users exit this system. Please be caution
when you decide to restore your database. **It will replace and
cover all your current data with the backup data.** Select the
directory where you store your backup data. Click on the "Restore"
button and start to restore your database.

Rebuild or Re-index Your Data

Where to:

Tools > Validate and Re-index database

This function will check the database and rebuild all the indexes of the
database to have optimal performance. Before executing this function,
please ensure all users exit this system. To validate and re-index your
database will not change the content of any existing data. Click on the
"Start" button and start to validate and re-index your database.
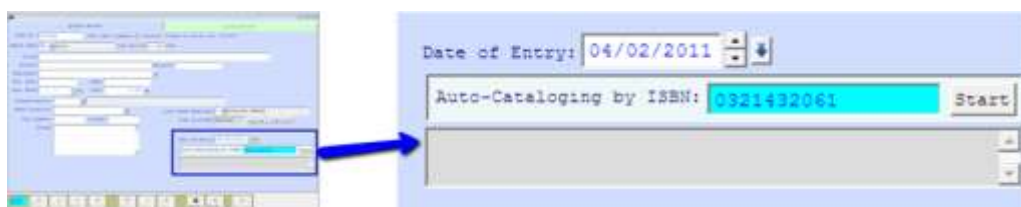
3. Collection Maintenance

Add a New Item

Where to:

Maintenance menu > Item maintenance > Add (down the Item maintenance window)

Shortcut button: Click on the item maintenance icon on the tool bar > Add

Before typing the item information manually, feel free to check whether the item can be found by auto-cataloging. Simply use your barcode scanner to scan the item twice or type in the ISBN/ISSN into the text field and then click "Start" button. If the item has been found, you will find all fields on the left are filled in. Feel free to refer, edit, correct or clean the data. If the item has not been found, you have to complete the fields manually. Click "Save" if you want to save the data; click undo if you want to leave this window.

Look up the ISBN / ISSN When Cataloging

Where to:

Maintenance menu > Item maintenance > Add (down the Item maintenance window)

Shortcut button: Click on the item maintenance icon on the tool bar > Add

Use your barcode scanner to scan the item or type in the ISBN/ISSN into the text field and then click "Start" button. If the item has been found, you will find all fields on the left are filled in. Feel free to refer, edit, correct or clean the data.

> Note: Sometimes the Bibliographic Utility does not provide the bibliographic information, such like latest books. You have to complete the fields manually at this point.

Edit/ Update an Item

Where to:

Maintenance menu > Item maintenance > Edit (down the Item maintenance window)

Shortcut button: Click on the item maintenance icon on the tool bar > Edit

After opening the edit window, feel free to edit or update your item data. Be sure to click "Save" if you want to save the data; click "Undo" if you want to leave this window.

Delete an item

Where to:

Maintenance menu > Item maintenance > Group records tab

Shortcut button: Click on the item maintenance icon 📕 on the tool bar
> Group records tab

View your group records and find the record(s) you want to remove.
Click on the record you want to delete and click "Del" (down the group
record window)

> Note: If an item is loaned out by clients, the record of it cannot be deleted. You
> have to wait until the item has been returned, and you will be able to delete it.

4. Member Maintenance

Add a new member

Where to:

Maintenance menu > Member maintenance > Add (down the Item maintenance window)

Shortcut button: Click on the member maintenance icon on the tool bar > Add

In the "Add" window, feel free to fill in all the fields. Please notice that the "Member No." cannot be changed in this version. You are able to create or maintain the content of "Member category" and "Loan Grade." Please see the table of content and find "Set up/ change member category" and "Set up/ change maintain member's type (grade)." Click "Save" if you want to save the data; click "Undo" if you want to leave this window.

Fast Add or change Member NO:
Right click on Add button, you can copy current record to a new record. You can change the Member No to a new number. Then delete the original now.

Edit/ update member data

Where to:

Maintenance menu > Member maintenance > Edit (down the Item maintenance window)

Shortcut button: Click on the member maintenance icon on the tool bar > Edit

In the "Edit" window, feel free to edit or update the existed data. Click "Save" if you want to save the data; click "Undo" if you want to leave this window.

Delete a member

Where to:
Maintenance menu > Member maintenance > Group records tab

Shortcut button: Click on the Member maintenance on the tool bar > Group records tab

View your group records and find the record(s) you want to remove. Click on the record you want to delete and click "Del" (down the group record window)

Note: If a member still keeps items which are unreturned, the record will not be able to delete. You have to wait until the item has been returned, and you will be able to delete the member.

5. Circulation

The circulation process is one of the key parts of a library. In this chapter, we will demo and elaborate the main function of the circulation process of POTA Media Library system.

Check out an item

Where to:

Circulation menu > Loan Service (Loan out/ return)

Shortcut button: Click on the Circulation button on the tool bar

Overview: Loan service panel of POTA Media Library System

Instruction:

Step1. Input your client/ user's member number

First of all, you are able to (1) use your barcode scanner, (2) right click the mouse and choose your client from the whole member list, or(3) type in the member number manually to input your client/ user's member number.

Step2. Verify the user info and click "ok"

After provinding a valid member number, the system will show you the user's information including one's Full name, Status, and other limitations. If you would like to change these information, please see the Maintenance or Other Settings in this manual. Clink "OK" and proceed.

Step3. Input the items that your client would like to check out.

The system will shift you to the Loaning Out form after you clicking on "OK" from user's informaiton. Free free to choose one way to input the item informaiton by (1) using your barcode scanner, (2) right clicking the mouse and choosing the items from the whole list, or(3) typing in the item number manually. If the item is avaliable to be checked, simply click green "Issue" button on the right side and finish checking. You will see a messagebox displaying "Saved Successfully"

Note: When an item is not available to be checked out, the "Issue" button becoming unclickable since the limitation of the item.

If you would like to change the setting such as loan grade and amount of loans, please see Other Settings in this manual.
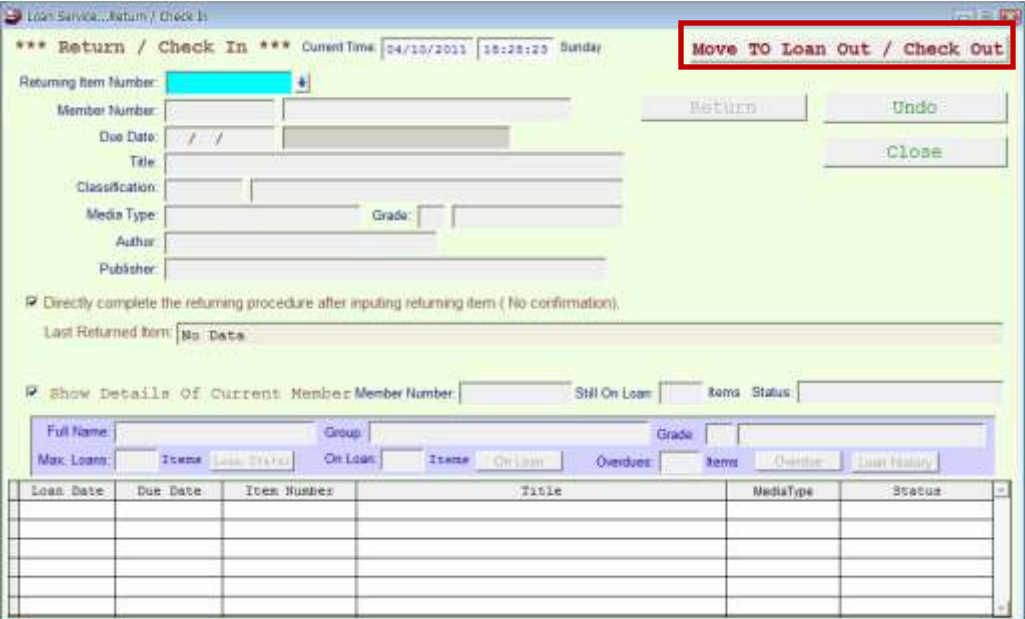
Return an item

Where to:

Circulation menu > Loan Service (Loan out/ return) > **Move to Return / Check In**

Shortcut button: Click on the Circulation button 🧩 on the tool bar > Return / Check In

Overview: Return/ Check In service panel of POTA Media Library System

Instruction:

Step1. Input the item information

Unlike checking process, you have to input the item information first. You are able to (1) use your barcode scanner, (2) right click the mouse and choose the item from the whole item list, or(3) type in the item number manually to input e the item information.
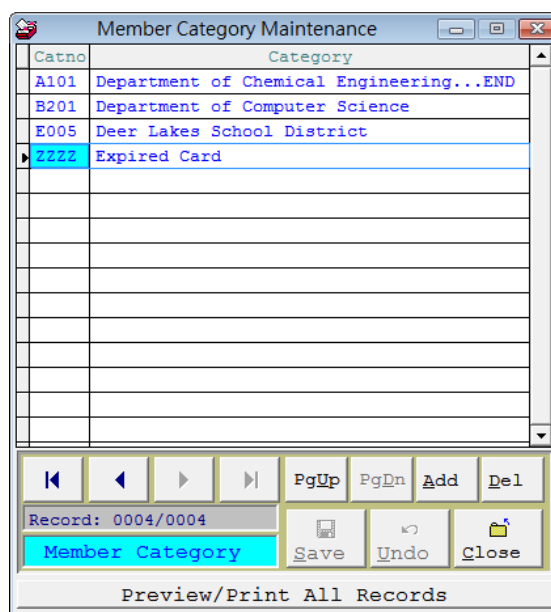
Step2. Click on "Return" button

After comfirming the item information, click on "Return" and finishing
returning.

6. Other Settings

Maintain Member Category

By setting various member groups, the system can help you to request the statistic reports/ loan history which are under specific member group (e.g. the overdue list of the eighth grade).
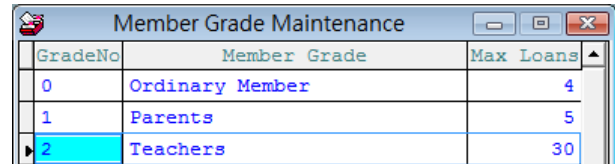
Where to:

Maintenance menu > Member Category Maintenance

In the Member Category Maintenance window, you are able to add, delete, and edit the member category by clicking corresponding buttons. Be sure to click "Save" button to save your setting, or the setting will not be applied.

Maintain Member's Type

By setting various member groups, the system can help you to apply different loan limitations based on your library's policy (e.g. a faculty member can loan up to 30 items, but a student can only loan 10).

Where to:

Maintenance menu > Member Grade Maintenance

In the Member Category Maintenance window, you are able to add, delete, and edit the member category by clicking corresponding buttons. Be sure to click "Save" button to save your setting, or the setting will not be applied.
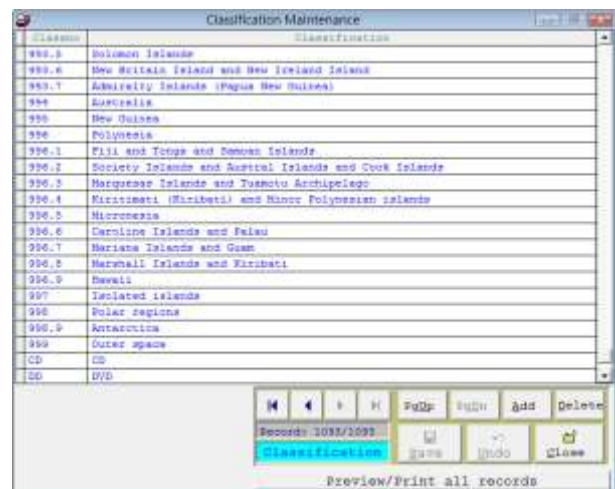
Maintain Classification Number

The POTA Media Library System uses Free Decimal Correspondence for the default classification. You are able to add, edit, or change the entire classification setting. Be sure to click "Save" button to save your setting, or the setting will not be applied.

Where to:

Maintenance menu > Classification Maintenance In the Classification Maintenance window, you will see the current classification numbers. Feel free to add, delete, and edit the numbers by clicking corresponding buttons.
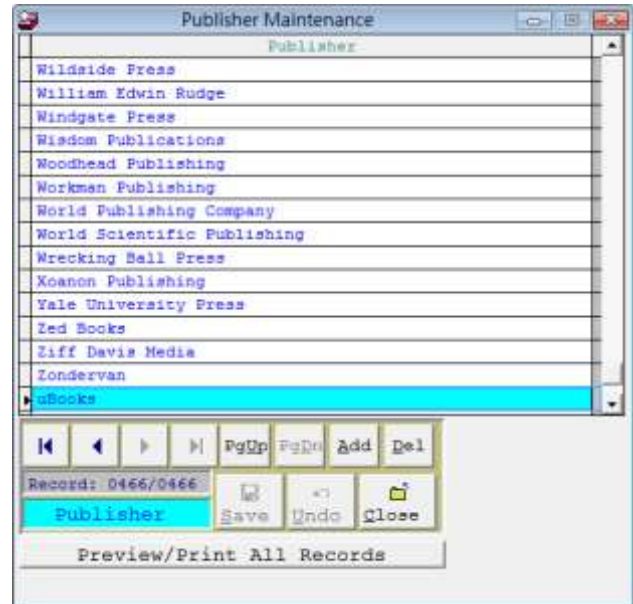
Maintain Publisher Data

Where to:

Maintenance menu > Publisher Maintenance

In the Publisher
Maintenance window, you
will see the major
publishers in the United
States. Feel free to add,
delete, and edit the
publisher information by
clicking corresponding
buttons.

Maintain Media's Type

One fantastic feature of POTA Media Library System is to let user
flexibly set up their collection into various media type.

Where to:

Maintenance menu >
Media Type Maintenance

In the Media Maintenance window, you are able to set up the media/
resource type as well as their corresponding policies, such as loan
period or limitation amounts (see the figure on right). You can choose
the most popular type as your default media (e.g. book).

Set up Operation Hours

Where to:

Maintenance menu > Closure Date Maintenance

In the Closure Dates Maintenance window, you are able to set up the closure dates of your library. The closing date will not be counted when calculating the loan period.
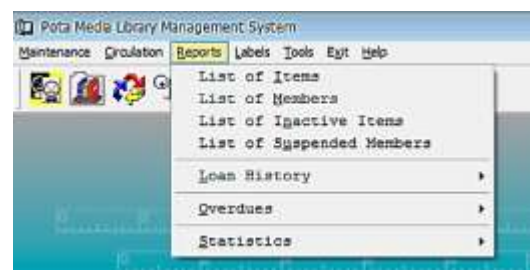
7. Report

This Chapter will guide you how to view and print reports of the collections, members, and other statistic data.
All the reports under the conditions that you selected can be exported into Excel file type.

View or print list of items

Where to:
Report > List of Items

This function allows you to view the report of the collection in your library. In the "List of Items" window, feel free to select data from item numbers, classification numbers, media type, loan grade, shelf location, and list type. You may also have your report in either brief or detail mode. Brief mode will only include an item's number, its title and its author, where you will see classification number, ISBN, call number …and more in the detail mode.

Click "preview", you are able to view the report (in PDF) which is based on your selection. Use "Print" button and print out your report.

View or print list of members

Where to:
Report > List of Members

This function allows you to have the report of member information. In the "List of Members" window, you can set conditions such as member category, member number, and loan grade. Choosing either brief or detail mode can control what attributes you will have in your report. Brief mode will only include a member's number, name, phone, and group name, where you will see other full information in the detail mode. Click "preview", you are able to view the report (in PDF) which is based on your selection. Use "Print" button and print out your report.

View or print list of inactive items

Where to:

Reports > List of Inactive Items

Once an item in your collection become unavailable, you may need to mark it as an inactive item (You may find this function in "Item Maintenance" window). This report function allows you to view the current inactive items. Simply select the condition from item number and classification number and view the report which is based on your need.

View or print list of suspended members

Where to:

Reports> List of suspended members

You may mark a user as a suspended members (find this function in "Member Maintenance" window). This report can help you to view the current suspended members.

Click "preview", you are able to view the report (in PDF) which is based on your selection. Use "Print" button and print out your report.

View or print list of loan history

Where to:

Reports > Loan history
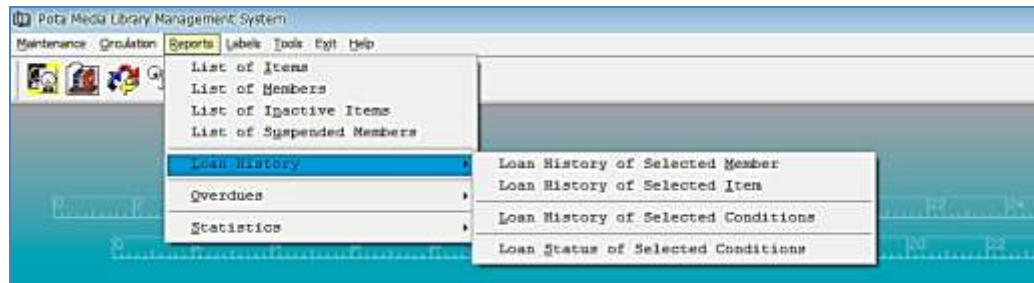
This function allows you to view or print the loan history of your library. Each function provides different conditions for choosing:

(1) Loan History of Selected Member
You may choose a member and view one's loan history.

(2) Loan History of Selected Item
You may choose an item and view its loan history.

(3) Loan History of Selected Conditions
You may customize several conditions (dates, item number, member number, member category, and classification) and view the combination of loan history.

(4) Loan Status of Selected Conditions

You may customize several conditions (item number, media type, and classification number) and view the combination of item status. You can use this function to conduct the inventory in your library.

```
            *** Pota Media Library ***                    Page: 1/1
            Loan Status of Selected Conditions     Printing Date:04/17/2011


   Item Number   : From "000001" To "000023"
   Mediatype     : From "AC" To "VC"
   Classification: From "006" To "VD"
   List TYpe     : All
   =============== ============================= ==================== =================
   Item Number    *Title                         *Media Type          *Status
   =============== ============================= ==================== =================
   000002         Powers To Lead , The                               Available
   000003         Theories Of The Information Soci                   Available
   000004         Friends : Making Them & Keeping                    Available
   000005         Breakthrough Rapid Reading                         Available
   000006         Short-cut Math                                     Overdue   42 days
   000007         Toy Story 2                                        Available
   000008         Mixed-up Chameleon                                 Available
   000009         Richard Iii                                        Available
   000010         Bread Bible , The                                  Overdue    7 days
```
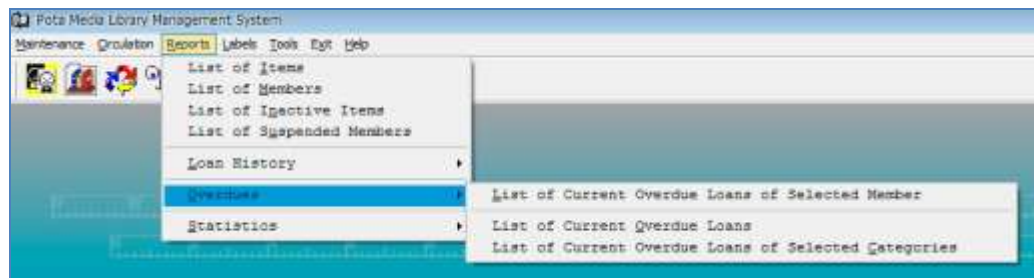
Be sure to click "preview" to view the report (in PDF) or use "Print" button to print out your report.

View or print list of current overdue loans

Where to:

Reports > Overdues

This function allows you to view or print the overdue record of your library. Each function provides different conditions for choosing:

(1) List of Current Overdue Loans of Selected Member

You may choose a member and view one's overdue record.

(2) List of Current Overdue Loans

This is a quick function that allows you to view the all overdue items.

(3) List of Current Overdue Loans of Selected Categories

You may customize the selected conditions based on the selected categories and view the overdue records. You are able to use this report to view the overdue records among different departments in a company or several classes in a school.

View or print list of statistics

Where to:
Reports > Statistic
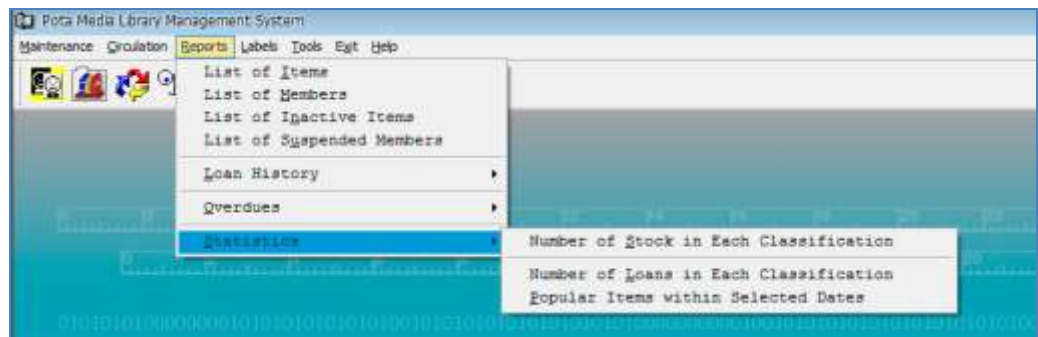
This function allows you to view the statistic data of your collection.

Number of Stock in Each Classification

This collection statistic report will display your all collection and its corresponding **classification numbers**. This can simply help you

with your collection evaluation. Be sure to click "preview" to view the report (in PDF) or use "Print" button to print out your report.

```
428      English language - Study and teaching - Usage       1      4.35%
513      Geometry                                             1      4.35%
641      Cooking and Gastronomy                               2      8.70%
808      Rhetoric and Style, Literary                         1      4.35%
822      English drama                                        1      4.35%
823      English fiction                                      1      4.35%
CD       CD                                                   1      4.35%
DD       DVD                                                  2      8.70%
TY       Toy, puppet, toy brick                               1      4.35%
---------------------------------------------------------------------------
Total Count: 21                                              23
---------------------------------------------------------------------------
```

(2) Number of Loans in Each Classification

This function can help you to find out the most frequent circulation (most frequent check-out time) by listing all **classification numbers** and its corresponding items. Be sure to click "preview" to view the report (in PDF) or use "Print" button to print out your report.

```
Loan Dates : Between {02/16/2011} and {04/10/2011}
Print Order: By Classification   [Main Classification]
======== ========================================= ======= ======= ========= =========
Classno *Classification                            *Items  *Loans  *Avg.Loans*LoanRatio
======== ========================================= ======= ======= ========= =========
158      Sensibility and Emotions and Affections        1      2      2.00     11.11%
302      Social psychology                              1      2      2.00     11.11%
352      Local government                               1      1      1.00      5.56%
428      English language - Study and teaching - Usage  1      1      1.00      5.56%
513      Geometry                                       1      1      1.00      5.56%
641      Cooking and Gastronomy                         2      2      1.00     11.11%
822      English drama                                  1      2      2.00     11.11%
DD       DVD                                            2      6      3.00     33.33%
TY       Toy, puppet, toy brick                         1      1      1.00      5.56%
-----------------------------------------------------------------------------------
Total Count: 9                                        11     18
-----------------------------------------------------------------------------------
```

Popular Items within Selected Dates

This report will display and sort the **items** in your library by most frequent check-out time. Be sure to click "preview" to view the report (in PDF) or use "Print" button to print out your report.

```
                    *** Pota Media Library ***                    Page: 1/1
                 Popular Items within Selected Dates        Printing Date:04/17/2011


Loan Dates     : Between [02/16/2011] and [04/10/2011]
Classification : From "006" To "VD"
Number of Items: All
===== ============= ============================================ ============================= =====
Order*Item Number  *Title                                       *Author                       *Loans
===== ============= ============================================ ============================= =====
    1 000007        Toy Story 2                                  Calabrese, Luigi-theo             3
    1 000020        Toy Story 3                                  Disney Interactive & Pixar        3
    3 000003        Theories Of The Information Society           Webster, Frank                    2
    3 000004        Friends : Making Them & Keeping Them          Criswell, Patti Kelley.           2
    3 000009        Richard Iii                                  Shakespeare, William              2
    6 000002        Powers To Lead , The                         Nye, Joseph                       1
    6 000005        Breakthrough Rapid Reading                   Kump, Peter                       1
    6 000006        Short-cut Math                               Kelly, Gerard                     1
    6 000008        Mixed-up Chameleon                           Carle, Eric                       1
    6 000010        Bread Bible , The                            Beranbaum, Rose Levy              1
    6 000012        Rose's Heavenly Cakes                        Beranbaum, Rose Levy.             1
------------------------------------------------------------------------------------------------------
Total Count: 11
------------------------------------------------------------------------------------------------------


                                              *** End of Print, Total Pages: 1 ***
```

8. Printing Barcodes

Print the item barcode labels

Where to:

Labels menu > Print Item Barcode Labels
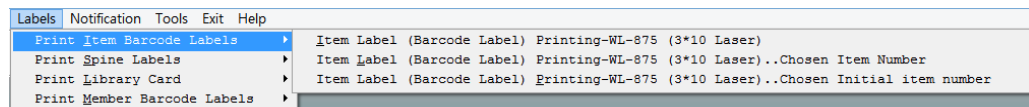
If you want to quickly generate a set of item barcodes, select the first option "Printing-WL-875 (3*10 Laser)."   After setting

your conditions, click "preview" to view the barcodes; click print to print out barcodes. After the barcodes are printed, feel free to use them to start your circulation.
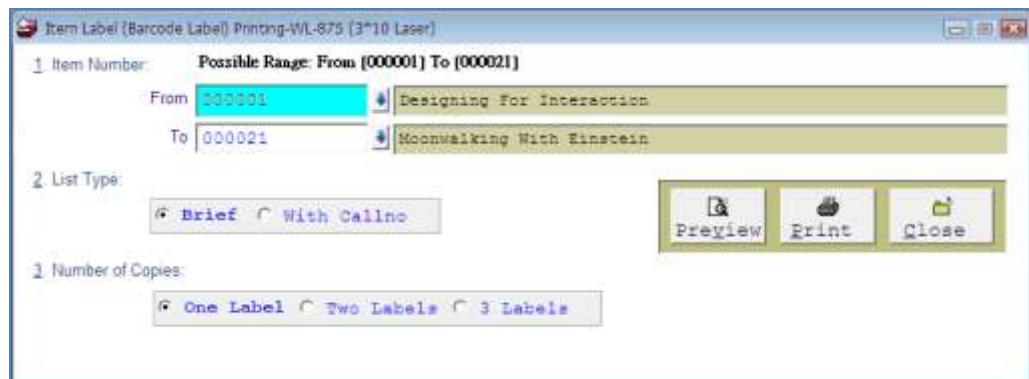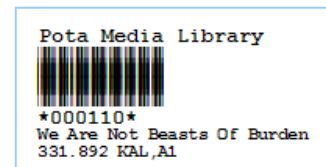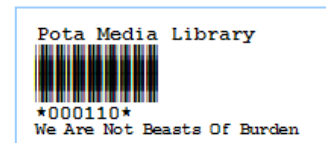
Note: If you want to select several item at once, please use the second option "Printing-WL-875 (3*10 Laser) chosen Item number." The window allows you to input the items which are not necessary to be continuous.

Print the spine labels

Where to:

Labels menu > Print Spine Labels
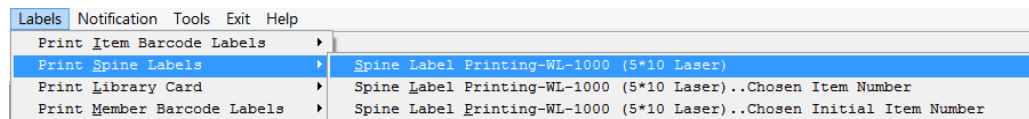
If you want to quickly generate a set of Spine Labels, select the first

option "Printing-WL-1000 (5*10 Laser)."

Please feel free to select/ unselect the checkboxes

(see the figure below). After setting your conditions,

click "preview" to view how the spine labels will be like. Click print to
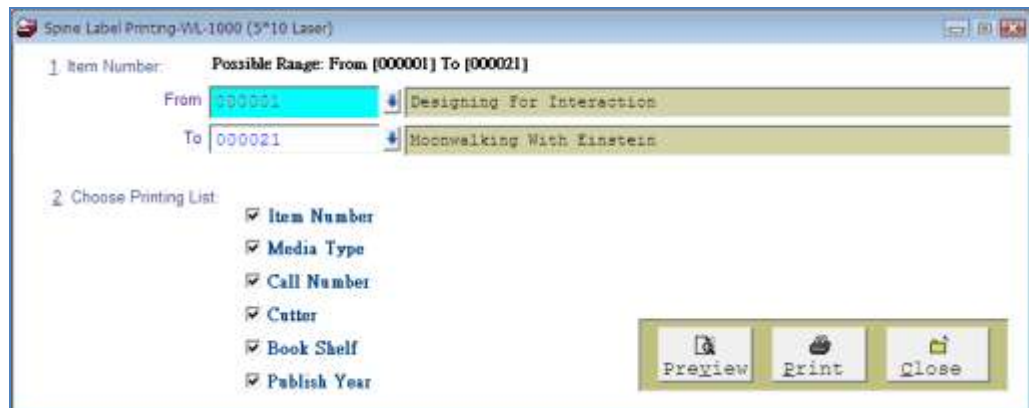
print out those labels.

> Note: If you want to select several item at once, please use the second option "Printing-WL-1000 (5*10 Laser) chosen item number." The window allows you to input the items which are not necessary to be continuous.

Print the member barcode labels

Where to:

Labels menu > Print Member Barcode Labels
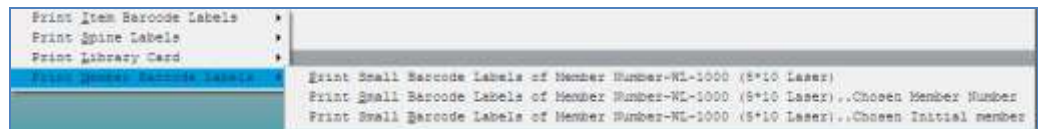
If your mother institution has already had its own ID/ member card, you simply need to print out the member's barcode labels. If you want to quickly generate a set of member barcodes, select the first option "Printing-WL-1000 (5*10 Laser)." After setting your conditions, click "preview" to view how the member barcode labels will be like. Click print to print out those labels.

Print the library cards

Where to:

Labels menu > Print Library Card

If you want to quickly generate a
set of library cards, select the first
option "Printing-WL-OL244 (2*5
Laser)." After setting your
conditions, click "preview" to view
how the library cards will be like.
Click print to print out those cards.

Print the system control barcode labels

What is "System Control Barcode"?

System control barcode function allows you to deal with different tasks in a short time seamlessly. You can simply scan these labels and gracefully shift your tasks without using a mouse or a keyboard.
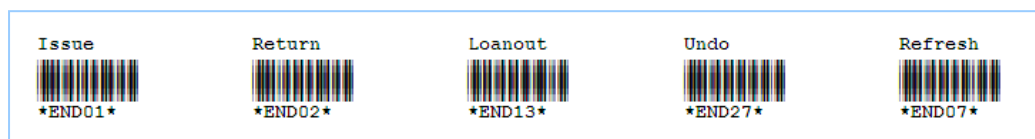
Example:

Where to:

Tools menu > Print System Control Barcodes
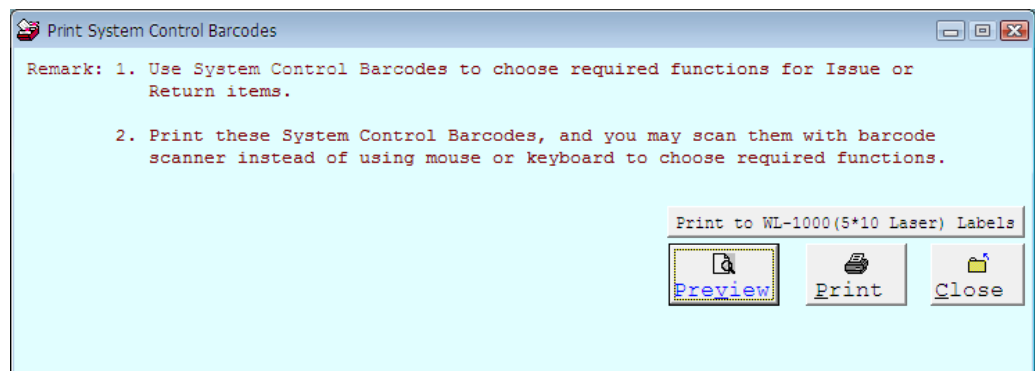
If you need the full instruction, select "Preview." If you need the barcodes only, click on "Print to WL-1000 (5*10 Laser) Labels."

9. Search the library

This chapter can help you with searching items and library members within the system. The version of POTA Media Library System (ML7E) only supports search function at library's administration side. If you need an internet-based user interface for searching and maintenance their information, please contact POTA Technologies design team.
http://en.potasoft.com/
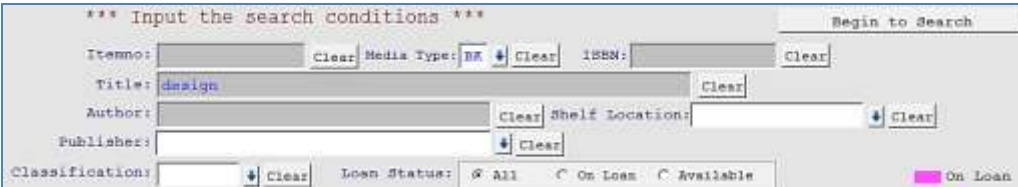
Item Advanced Search

Where to:

Maintenance Menu > Item Maintenance > Advanced Search Button (Beside the Item No. Field)

Shortcut button: Click on the item advanced search button 🔍 on the tool bar
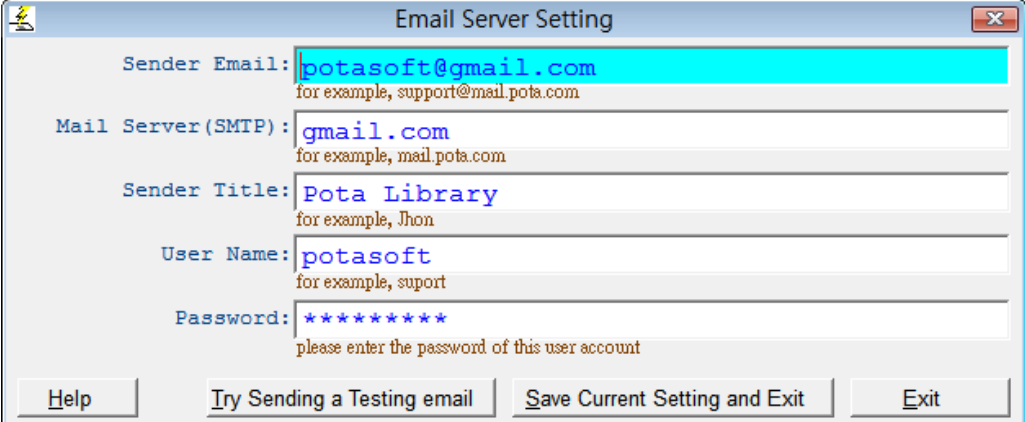
You may input your query in any field (title, author…) and then click "Begin to Search."

The system will return the best result which matches your query.

Member Advanced Search

Where to:

Maintenance menu > **Member maintenance** > Advanced Search
Button (beside the Member No. Field)

Shortcut button: Click on the member advanced search button on
the tool bar

You may input your query in any field (member number, names,
telephone…) and then click "Begin to Search."

The system will return the best result which matches your query.

10. Email Notification

Email server setting

Where to:

Menu > **Notification** > Email Server Setting

Set up the Email Server to send out "Overdue" & "About to expire" notification.. Gmail, Yahoo, Hotmail, Outlook are supported.

Notification: Overdue

Where to:

Menu > **Notification** > Notification: Overdue

Click on "Do not resend" to send overdue notification just once.

Notification: About to expire

Where to:

Menu > **Notification** > Notification: About to expire

Click on "Do not resend" to send "About to Expire" notification just once.

And put ___ Day(s) in Advance before Due Date.

E-mail Notification Sample:

13. Import Data from Excel

Import Item Records from Excel

Where to:

Menu >Tools > Import Data from Excel > Import Item records from Excel

Please refer to the sample Excel structure to fill the Excel file for

importing Item records into system database. (1st row will be neglected)

Download the sample Excel http://download.potasoft.com/manual/Item_Excel.xls

> Note: Import massive item records into database might change lots of data of
> system database. Suggest to backup the whole database for doing it.

To replace the original data, by click on "Replace the original record

when importing the existing item number in database".

Import Member Records from Excel

Where to:

Menu >Tools > Import Data from Excel > Import Member records from Excel

Please refer to the sample Excel structure to fill the Excel file for importing Member records into system database. (1st row will be neglected)

Download the sample Excel http://download.potasoft.com/manual/Member_Excel.xls

> Note: Import massive item records into database might change lots of data of system database. Suggest to backup the whole database for doing it.

To replace the original data, by click on "Replace the original record when importing the existing item number in database".

12. Export Data to Excel

Export All Item Records to Excel

Where to:

Menu >Tools > Export Data to Excel > Export All Item Records to Excel
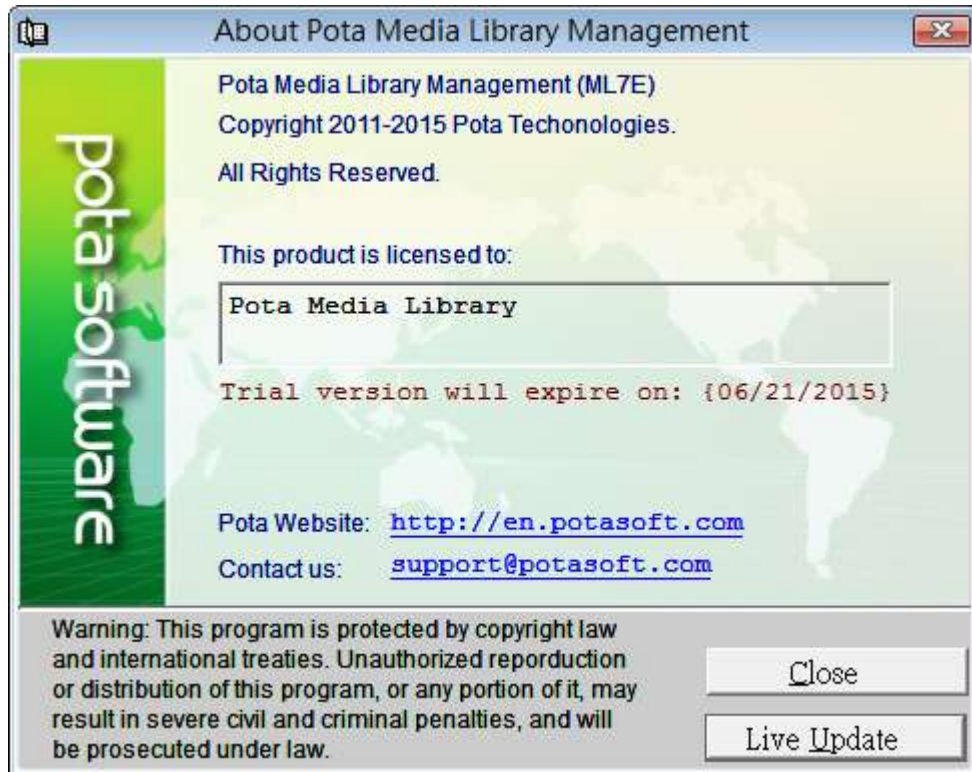
Export All Member Records to Excel

Where to:

Menu >Tools > Export Data to Excel > Export All Member Records to Excel

13. Live Update

Live Update

Where to:

Menu > Help >About the POTA Media Library Management

Click on the "Live Update" button to get the updated executive file. We update the program to get compatible with the latest windows and office versions. And also add some small functions to make friendlier user interface. "Live Update" will not change the content of any existing data.

14. How to Buy

We offer up to 90 day & 990 record limitation free trial version, you can try all of the features in the program to get a feel for it. And will remind you when your trial is coming to an end. If you want to convert to the full version, please visit our website (http://en.potasoft.com/) to see the instruction. We take PayPal and other forms of payment upon request. If you have any questions, please visit our website or contact us via email (support@potasoft.com).