



POTA SOFTWARE | PACKAGES & CUSTOMER DESIGN

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

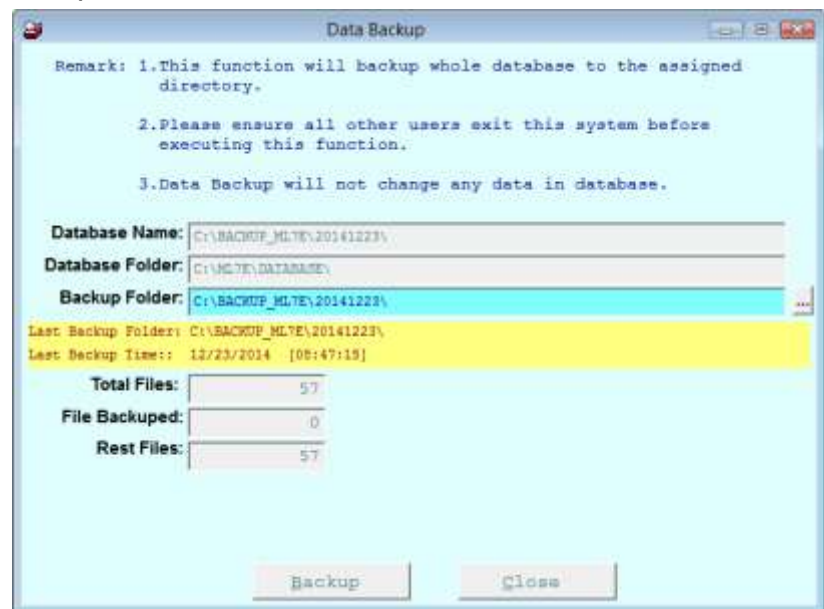
This chapter will demonstrate how to backup, restore, and re-index your database in the POTA Media Library System.

Back Up Your Data

Where to:

Tools > Data backup

We suggest
you backup
your
database
regularly.
Before
executing
the backup
process,
please



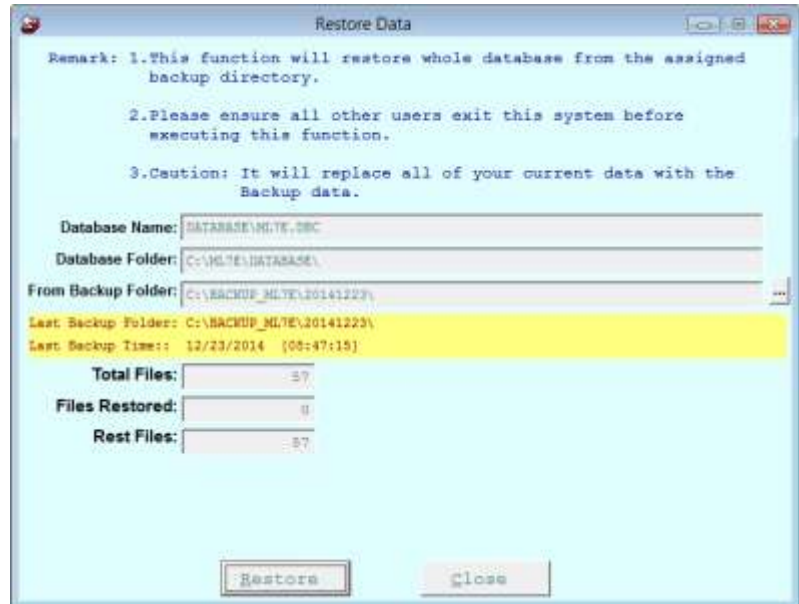
ensure all users exit this system. Simply assign a directory or use default directory (C:\BACKUP_ML7E\20141223) in the Data Backup window. Click on the “Backup” button and start to back up your database.

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

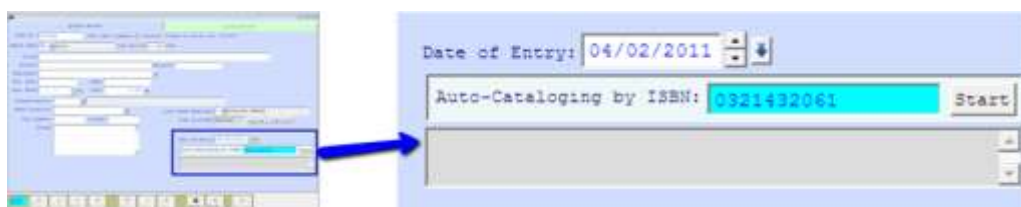
Add a New Item

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.

*** Current Items On Loan ***						Loan Status		Current Item On Loan		2 Items	
Loan Date	Due Date	Item Number	Title	Media Type	Status						
04/10/2011	04/25/2011	000009	Richard III	Book	15 days to due						
04/10/2011	04/25/2011	000003	Theories Of The Information Society	Book	15 days to due						

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

*** Loan Out (Check Out) ***

Current Time: 04/10/2011 12:24:56 Sunday [Move TO Return / Check In](#)

Member No: 000010 Full Name: Davis, Maritza W Group: Deer Lakes School District
 Full Name: Davis, Maritza W Max Loans: 4 Items Grade: 0 Ordinary Member
 Status: Available Items: 2 [Undo](#) On Loan: 2 Items On Loan Overdue: 0 Items Overdue Scan History

*** Details of Loaning Out ***

Choosing For Issuing: 1 Items Available: 1 Items

Item Number	Title	Due Date	Loan Grade	Status	Media Type	Loan Period
000004	Friends : Making Them & Keeping Them	04/25/2011	0	Ordinary Member	Book	14 Days
		/ /				
		/ /				

[Issue](#) [Refresh](#) [Undo](#) [Close](#)

[Print](#) [F5](#) [F6](#) [F7](#) [F8](#) [F9](#) [F10](#) [F11](#) [F12](#) [Esc](#) [003 of 003](#)

☒ Show items on loan of existing member

Last Loan Item: Theories Of The Information Society(000003) etc. Total: 2 Items, Loaned By: Davis, Maritza W(000010)

*** Current Items On Loan ***

Loan Status: [Loan Status](#) Current Qty. On Loan: 2 Items

Loan Date	Due Date	Item Number	Title	Media Type	Status
04/10/2011	04/25/2011	000003	Richard III	Book	15 days to due
04/10/2011	04/25/2011	000003	Theories Of The Information Society	Book	15 days to due

Instruction:

Step1. Input your client/ user's member number

*** Loan Out (Check Out) ***

Current Time: 04/10/2011 16:31:03 Sunday Move TO Return / Check In

Member No: 4 Full Name: Group: Max. Loans: 4 Items Grade: 0 On Loan: 0 Items Overdue: 0 Items Overdue Loan History

Status: Available Items: 0 Undo

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"

*** Loan Out (Check Out) ***

Current Time: 04/10/2011 16:50:20 Sunday Move TO Return / Check In

Member No: 000010 Full Name: Davis, Maritza M Group: Deer Lakes School District Max. Loans: 4 Items Grade: 0 Ordinary Member On Loan: 0 Items Overdue: 0 Items Overdue Loan History

Status: Available Items: 4 Undo

After providing 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. Click "OK" and proceed.

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

*** Details of Loaning Out ***

Choosing For Issuing: 2 Items Available: 2 Items

Item Number	Title	Due Date	#	Loan Grade	Status	Media Type	Loan Period
000009	Richard III	04/28/2011	0	Ordinary Member	OK - ReLoan	Book	14 Days
000003	Theories Of The Information Society	04/29/2011	0	Ordinary Member	OK	Book	14 Days
	/ /	/ /					
	/ /	/ /					

Issue Refresh Undo Close

803 of 804 Show items on loan of existing member

Last Loan Item: No Data

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 available 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

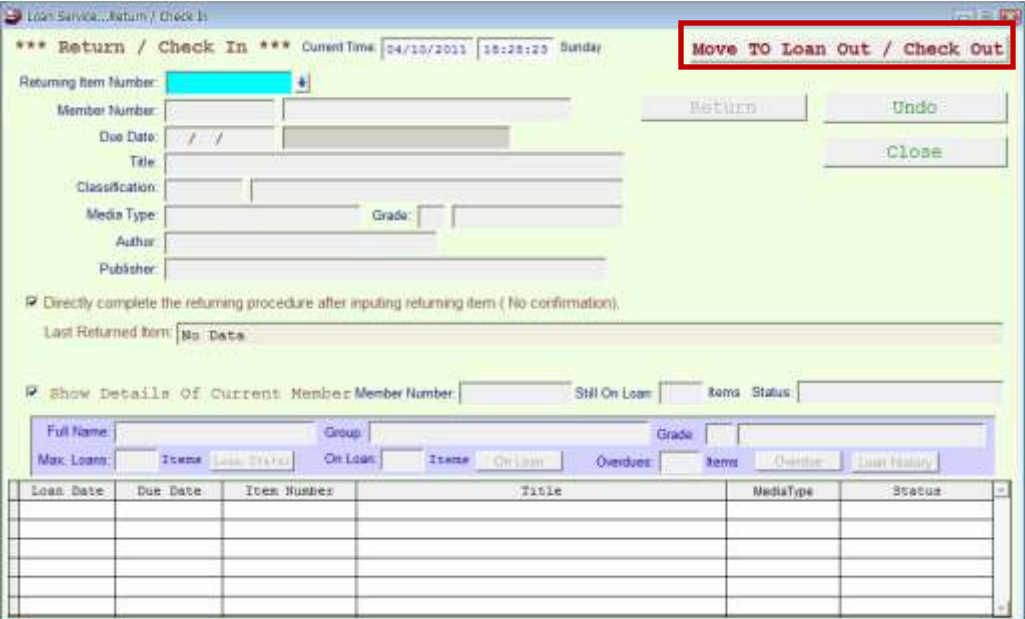
Where to:

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



*** Return / Check In *** Current Time: 04/10/2011 10:28:20 Sunday

Returning Item Number:

Member Number:

Due Date:

Title:

Classification:

Media Type: Grade:

Author:

Publisher:

☒ Directly complete the returning procedure after inputing returning item (No confirmation).

Last Returned item:

☒ Show Details Of Current Member Member Number: Still On Loan: Items: Status:

Loan Date	Due Date	Item Number	Title	MediaType	Status

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 the item information.

Step2. Click on "Return" button

*** Return / Check In *** Current Time: 04/10/2011 18:33:38 Sunday Move TO Loan Out / Check Out

Returning Item Number: 000002

Member Number: 000007 Pancher, Gloria W

Due Date: 04/10/2011

Title: Powers To Lead, The

Classification: 352 Local government

Media Type: Book Grade: 2 Teachers

Author: Nye, Joseph

Publisher: Oxford: Oxford University Press

Return Undo

Close

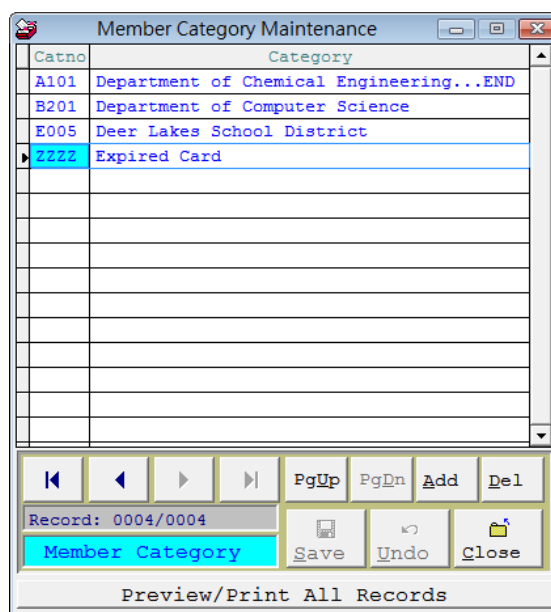
After confirming the item information, click on “Return” and finishing returning.

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:



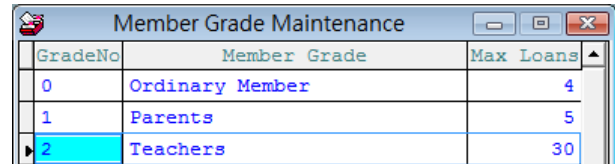
Maintenance menu > Member Category Maintenance

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:



GradeNo	Member Grade	Max Loans
0	Ordinary Member	4
1	Parents	5
2	Teachers	30

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.

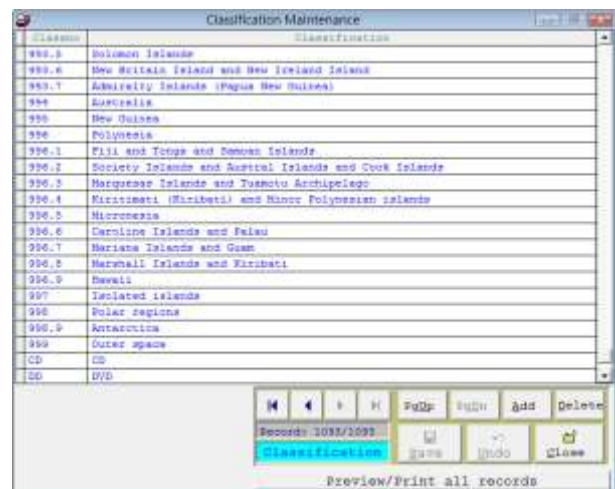
Maintain Classification Number

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.



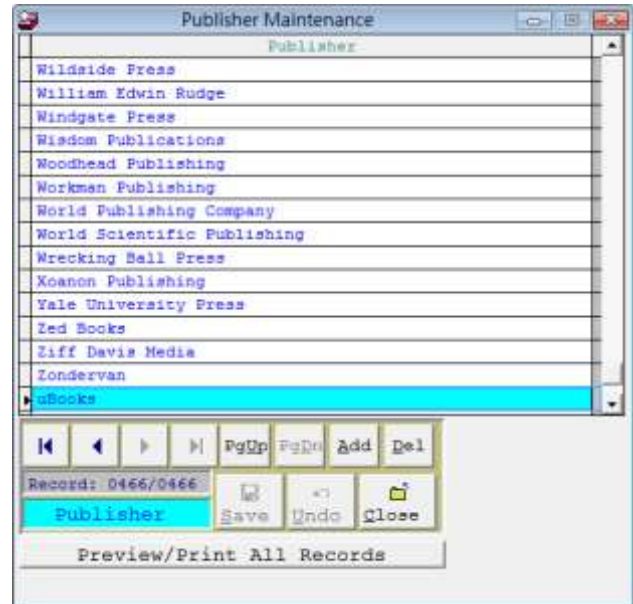
Classification	Classification
999.5	Solomon Islands
999.6	New Britain Islands and New Ireland Islands
999.7	Admiralty Islands (Pagus New Guinea)
999	Australia
999	New Guinea
999	Polynesia
999.1	Fiji and Tonga and Samoa Islands
999.2	Society Islands and Austral Islands and Cook Islands
999.3	Marquesas Islands and Tuamotu Archipelago
999.4	Wallis and Futuna (Wallis) and Minor Polynesian Islands
999.5	Micronesia
999.6	Caroline Islands and Palau
999.7	Mariana Islands and Guam
999.8	Marshall Islands and Kiribati
999.9	Neville
997	Isolated Islands
999	Polar Regions
999.9	Antarctica
999	Outer Space
CD	CD
DVD	DVD

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

The screenshot shows a window titled "Media Type Maintenance" containing a table with columns: No, Media Type, LoanPeriod, LimitLoans, and Default. The "Book" row is selected and has its "Default" checkbox checked.

No	Media Type	LoanPeriod	LimitLoans	Default
AC	Audio Cassette	7	2	<input type="checkbox"/>
BK	Book	14	6	<input checked="" type="checkbox"/>
CR	Cd-rom	7	2	<input type="checkbox"/>
CS	Computer Software	7	2	<input type="checkbox"/>
DV	Dvd	7	2	<input type="checkbox"/>
TY	Toy	3	1	<input type="checkbox"/>
VC	Video Cassette	7	2	<input type="checkbox"/>

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

ClosureDates	Remark
01/17/2010	Martin Luther King, Jr.'s Birthday Ob

Weekend days: Library will normally be Closed throughout the year.

**** Weekend Days ****

- ☒ Sunday
- ☐ Monday
- ☐ Tuesday
- ☐ Wednesday
- ☐ Thursday
- ☐ Friday
- ☐ Saturday

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

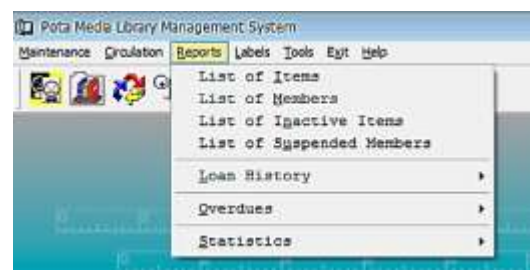
This Chapter will guide you how to view and print reports of the collections, members, and other statistic data.

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.

The screenshot shows a window titled "List of Items" with the following search criteria:

- 1. Item Number:** Possible Range: From {000001} To {000021}. From: 000001, To: 000021. Results: Designing For Interaction, Moonwalking With Einstein.
- 2. Classification:** Possible Range: From {000} To {VD}. From: 000, To: VD. Results: General works, books and libraries, information sciences, VCD.
- 3. Media Type:** Possible Range: From {AC} To {VC}. From: AC, To: VC. Results: Audio Cassette, Video Cassette.
- 4. Limited Loan Grade:** Possible Range: From {0} To {2}. From: 0, To: 2. Results: Ordinary Member, Teachers.
- 5. Shelf Location:** Possible Range: From {} To {A3}. From: (empty), To: A3.
- 6. List Type:** Brief (selected), Detail.

Buttons at the bottom right: Export to Excel, Preview, Print, Close.

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

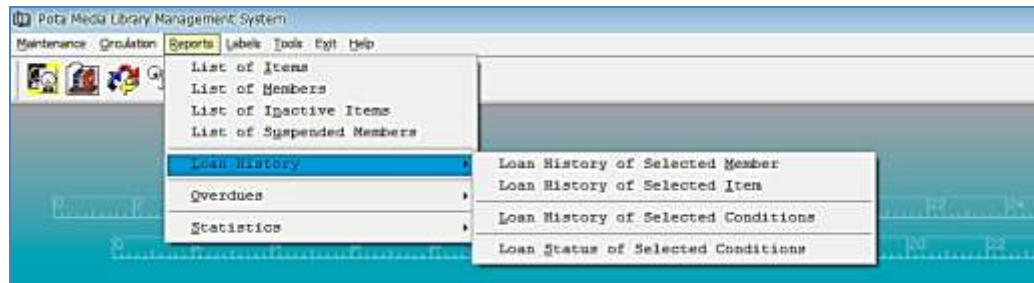
You may mark a user as a suspended members (find this function in “Member Maintenance” window). This report can help you to view the current suspended members.

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.

*** Pota Media Library ***					Page: 1/1
Loans History of Selected Conditions					Printing Date:04/17/2011
Loan Dates : Between {02/16/2011} and {04/10/2011}					
Item Number : From "000001" To "000023"					
Member No. : From "000001" To "000012"					
Member Category: From "A101:Department of Chemical Engineering...END" To "E005:Deer Lakes School District"					
Classification : From "006:Cognitive science" To "VD:VCD"					
Loan Date	*Itemno	*Title	*Member No.	*Full Name	*ReturnDate
02/16/2011	000007	Toy Story 2	000001	Barrett, Janice G	02/20/2011
02/16/2011	000012	Rose's Heavenly Cakes	000001	Barrett, Janice G	02/20/2011
02/20/2011	000003	Theories Of The Information Society	000009	Darling, Pat V	02/27/2011

(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 ***

Loan Status of Selected Conditions

Printing Date:04/17/2011

Page: 1/1

Item Number : From "000001" To "000023"

Mediatype : From "AC" To "VC"

Classification: From "006" To "VD"

List TType : All

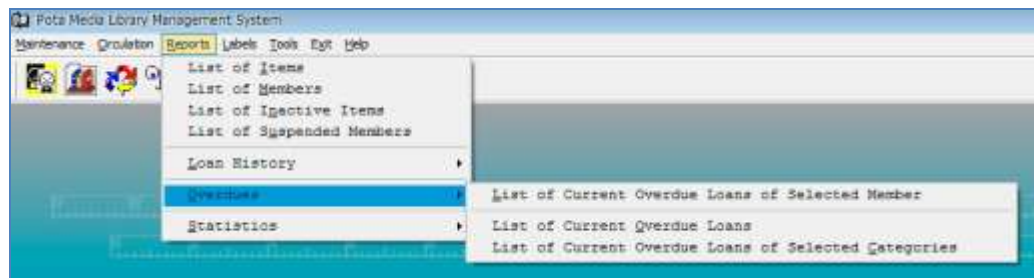
Item Number	*Title	*Media Type	*Status
000002	Powers To Lead , The		Available
000003	Theories Of The Information Soci		Available
000004	Friends : Making Them & Keeping		Available
000005	Breakthrough Rapid Reading		Available
000006	Short-cut Math		Overdue 42 days
000007	Toy Story 2		Available
000008	Mixed-up 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.

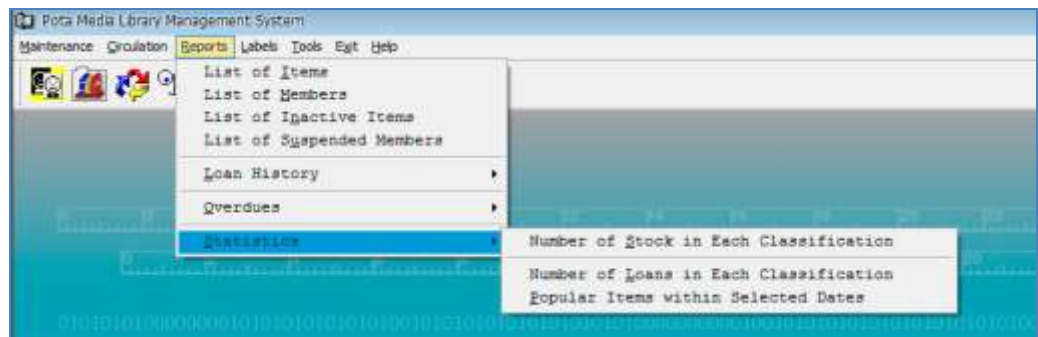
(3) List of Current Overdue Loans of Selected Categories

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 Melley.	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

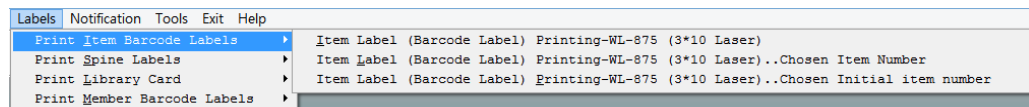
*** End of Print, Total Pages: 1 ***

8. Printing Barcodes

Print the item barcode labels

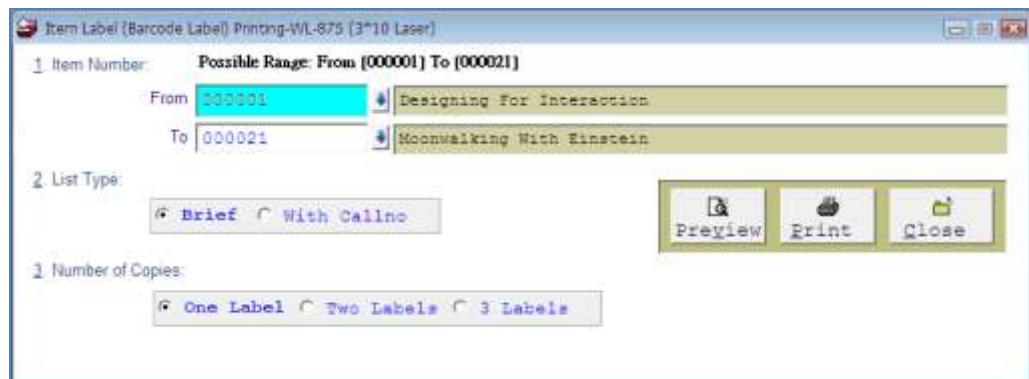
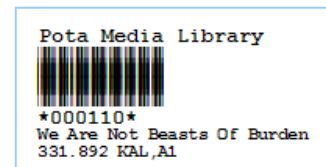
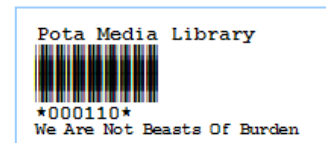
Where to:

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.

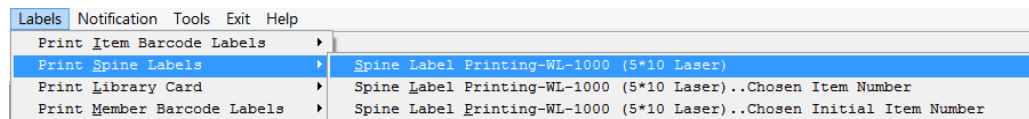


Note: If you want to select several item at once, please use the second option “Printing-WL-875 (3*10 Laser) chosen Item number.” The window allows you to input the items which are not necessary to be continuous.

Print the spine labels

Where to:

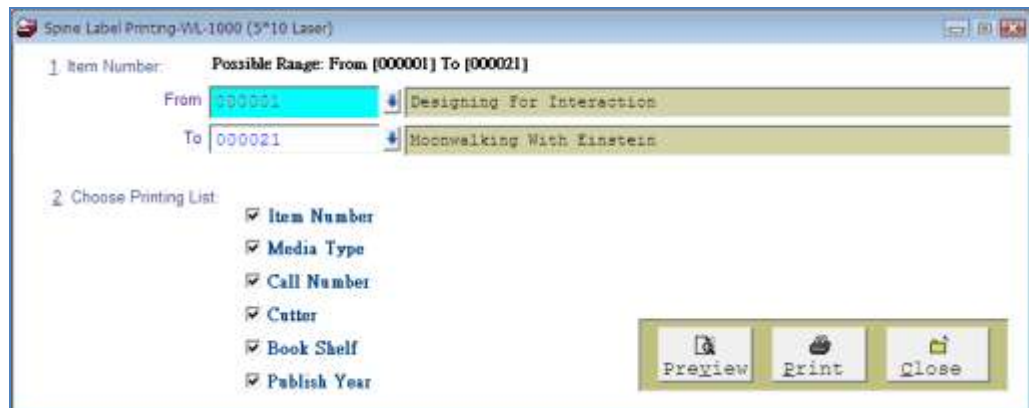
Labels menu > Print Spine Labels



If you want to quickly generate a set of Spine Labels, select the first option “Printing-WL-1000 (5*10 Laser).”

000110
BK
331.892
KAL
A1
2011

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.

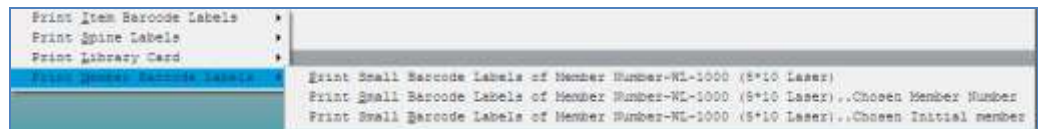


Note: If you want to select several item at once, please use the second option “Printing-WL-1000 (5*10 Laser) chosen item number.” The window allows you to input the items which are not necessary to be continuous.

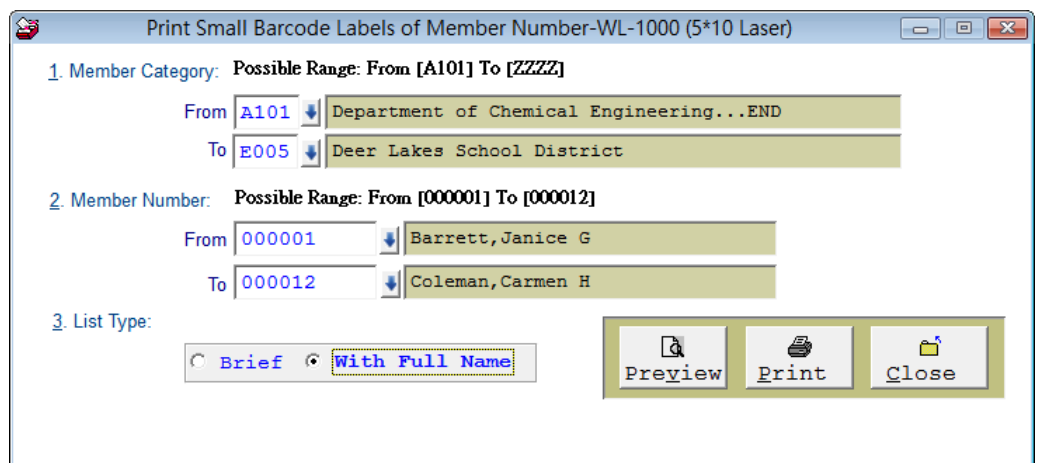
Print the member barcode labels

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.



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

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.

**Pota Media Library
Library Card**

Name : Davis, Maritza W
Phone : 205-349-2204
Address: 604 Brookside Drive
Tuscaloosa, AL 35401

ID : 000010 




Library Card Printing-WL-OL244 (2*5 Laser)

1. Member Category: Possible Range: From [A101] To [ZZZZ]

From: A101 Department of Chemical Engineering...END
To: E005 Deer Lakes School District

2. Member Number: Possible Range: From [000001] To [000012]

From: 000001 Barrett, Janice G
To: 000012 Coleman, Carmen H

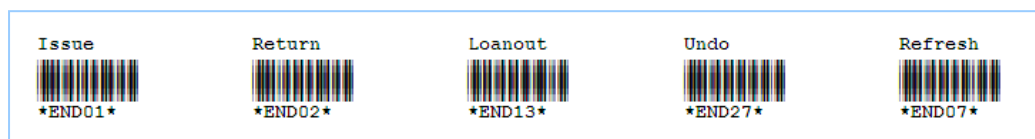
 Preview  Print  Close

Note: If you want to select several item at once, please use the second option “Printing-WL-OL244 (2*5 Laser) chosen member number.” The window allows you to input the members which are not necessary to be continuous.

Print the system control barcode labels

What is “System Control Barcode”?

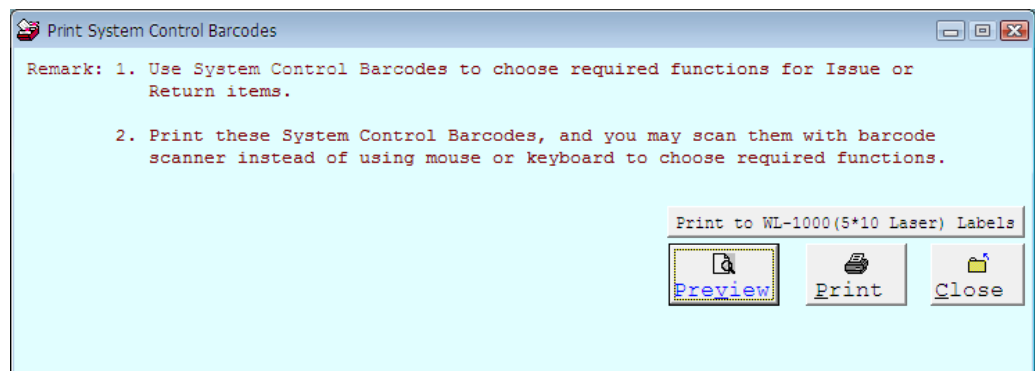
System control barcode function allows you to deal with different tasks in a short time seamlessly. You can simply scan these labels and gracefully shift your tasks without using a mouse or a keyboard.



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/>

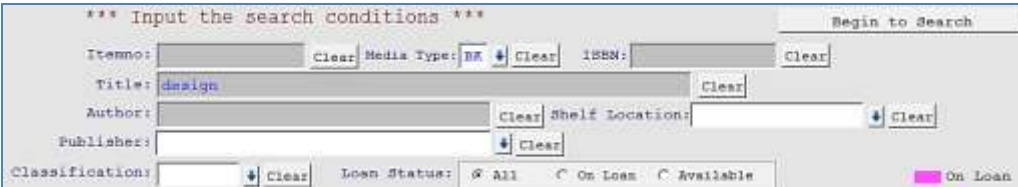
Item Advanced Search

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

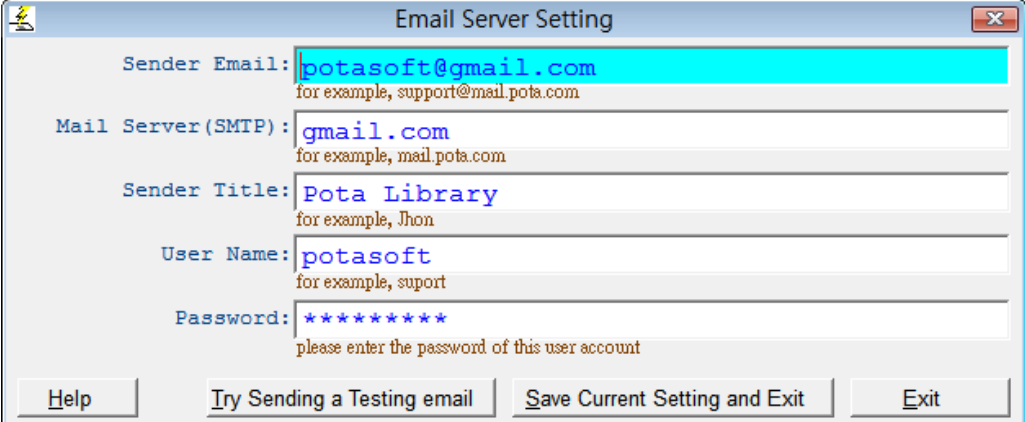
You may input your query in any field (title, author...) and then click "Begin to Search."



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

10. Email Notification

Email server setting



The screenshot shows a dialog box titled "Email Server Setting" with a standard Windows-style title bar (minimize, maximize, close buttons). The dialog contains five input fields, each with a label and a placeholder example:

- Sender Email:** potasoft@gmail.com (placeholder: for example, support@mail.pota.com)
- Mail Server (SMTP):** gmail.com (placeholder: for example, mail.pota.com)
- Sender Title:** Pota Library (placeholder: for example, Jhon)
- User Name:** potasoft (placeholder: for example, support)
- Password:** ***** (placeholder: please enter the password of this user account)

At the bottom of the dialog, there are four buttons: "Help", "Try Sending a Testing email", "Save Current Setting and Exit", and "Exit".

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

Notification: Overdue

Member Category: Possible Range: From [A101] To [ZZZZ]

Today: 12/23/2014

From: A101 Department of Chemical Engineering...ERD ☒ Do not resend Retrieve Overdue Loan(s)

To: m005 Deer Lakes School District

Loans Overdue Number of member(s) with overdue item(s): 1 member(s), total item(s) count: 1 item(s)

Member No.	Full Name	Email	Details of Overdue Loan(s)	Ready
00011	Trent, Barbara S	BarbaraSTrent@example.com	*** Overdue Item(s): 1 item(s) *** Short-cut Math(010006) Due Date: 11/18/2014, Day(s) overdue: 25 day(s)	<input checked="" type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

Page: 001 of 001 Choose All Unchoose All Choose Unchoose Number of Chosen for Emailing: 1

☒ :Checked for Sending Notification Ready for sending overdue notification Close

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

Notification: About to expire

Where to:

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

Notification: About to Expire

Member Category: Possible Range: From [A101] To [ZZZZ]

From: A101 Department of Chemical Engineering...END To: m005 Deer Lakes School District

Do not resend Retrieve About to Expire Loan(s)

Day(s) in Advance Before Due Date: 3 day(s)

Today: 12/23/2014

Loan(s) About to expire Number of member(s) with about-to-expire loan(s): 2 member(s), total item(s) count: 2 item(s)

Member No.	Full Name	Email	Details of About-to-expire Loan(s)	Ready
000001	Fancher, Gloria W.	GloriaW.Fancher@example.com	*** About to expire item(s) (3 days before due): 1 item(s) *** <1>Powers To Lead , The(000002) Due Date: 12/23/2014, Day(s) before Due: 0 day(s)	Y
000012	Coleman, Carmen H.	CarmenH.Coleman@example.com	*** About to expire item(s) (3 days before due): 1 item(s) *** <1>Bread Sible , The(000012) Due Date: 12/23/2014, Day(s) before Due: 0 day(s)	Y

Choose All Unchoose All Choose Unchoose Number of Chosen for Emailing: 2

Checked for Sending Notification Ready for sending about-to-expire notification Close

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:

Message of The About-To-Expire Notice (Sample)

Message of The About-To-Expire Notice (Sample) Close

Dear Fancher Gloria W:

This notice is to remind you that these item(s) will be due soon.

*** The number of about-to-expire item(s): 1 item(s) ***

<1>Title: Powers To Lead , The(000002)
Loan Date: 12/09/2014, Due Date: 12/23/2014, Day(s) before Due: 0 day(s)

Please return the item(s) or have the item(s) renewed.

By Pota Media Library at 12/23/2014 10:19:05

13. Import Data from Excel

Import Item Records from Excel

Where to:

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

Import Item Records from Excel

*** Sample Structure of Importing Excel File ***

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
	Item Number	Title	Medium	Author	Edition	Publisher	Pub. Year	ISBN	Classno	Acq. Date	Shelf	Cost	Call Number	Coffer
1	000001	Designing For Interaction	BK	Ottaviano, Dan F		Berkeley, Ca New Riders	2007	0321432061	004	02/07/2011	A1	12.90	004.019	SAF
2	000002	Powers To Lead, The	BK	Nye, Joseph F		Oxford Oxford University	2008	9780195335620	352	01/03/2011		14.70	352.236	NVE

Compatibility of Excel Versions

Note: 1. Please refer to the upper sample Excel structure to fill the Excel file for importing records into system database. (1st row will be neglected.)
 2. Allow to import 14 fields (from A to N) of the item records, please fill the data in the importing Excel file with the right order.
 3. records with empty item number in the importing Excel file will be discarded, and will not add into the current database.
 4. All item number data in the importing Excel file should be unique, records in the importing Excel file with non-unique item number will be discarded, and will not add into current database.
 5. If the item number of the importing record has already existed in current database, this new data record will replace (overwrite) the old record (which with the same item number) in the original database.

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

Importing File: C:\Users\ADMIN\Desktop\DOC\ITEM_EXCEL_20141229.XLS

Choose the Excel File for Importing: Load Excel Data in

Status	Item Number	Title	Medium	Author	Edition	Publisher	Pub Year	ISBN	Classno	Acq. Date	Shelf	Cost	Call no	Coffer
EXISTING	000001	Designing For Inter	BK	Safer, Dan	F	Berkeley, Ca	2007	0321432004	11/30/2014	A1		0.00	004.019	SAF
EXISTING	000002	Powers To Lead, The	BK	Nye, Joseph F	F	Oxford Oxford	2008	97801953352	11/01/2014			0.00	352.236	NVE
EXISTING	000003	Theories Of The Int	BK	Weeber, Fran	F	New York: R	2006	0415409302	10/01/2014			0.00	382.2	WEB
EXISTING	000004	Friends: Making Th	BK	Criswell, Pat	F	Middletown, W	2006	1593601158	08/21/2014			0.00	159.250	CR
EXISTING	000005	Breakthrough Rapid	BK	Kump, Peter	F	Paramus, Nj	1999	0137935428	10/15/2014			0.00	428.43	KUM
EXISTING	000006	Short-cut Math	BK	Kelly, Gerard	F	New York: O	1984	0485248513	10/11/2014			0.00	513.92	KEL
EXISTING	000007	Ty Story 2	CV	Calabrese, Lu		Burbank, Ca	2002	000	11/13/2014			0.00	00.001	CAL
EXISTING	000008	Mixed-up Chamele	TV	Carls, Eric		South Park, F	2006	000	11/13/2014			0.00	TY.001	CAR

☐ Empty item numberNon-unique item number, will not add into database.

Save to Database Close / Exit

Loaded item records for importing: 21 item records, and 0 item records are not acceptable.

Acceptable records for importing: 21 item records.

☒ Replace the original record when importing the existing item number in database

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.potasoftware.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

***** Sample Structure of Importing Excel File *****

	A	B	C	D	E	F	G	H	I	J	K	L
	Member No.	Salutation	First Name	Last Name	Gender	Home Phone	Work Phone	Cell Phone	Email	Cat No.	Address	
1	000001	Ms.	Janice	G. White	Female	302-9876789	210-3456754	803-5255001	test@gmail.com	A1	4108 Village View Drive Frederick, MD 21701	
2	000002	Mr.	John	Asano	Male	914-5139819	234-7623485	210-9854562	test@yahoo.com	A2	899 Mount Taber New York, NY 10013	

Competibilities of Excel Versions

Note: 1. Please refer to the upper sample Excel structure to fill the Excel file for importing records into system database. (1st row will be neglected.)
2. Allow to import 12 fields (from A to L) of the member records, please fill the data in the importing Excel file with the right order.
3. records with empty member number in the importing Excel file will be discarded, and will not add into the current database.
4. All member number data in the importing Excel file should be unique, records in the importing Excel file with non-unique member number will be discarded, and will not add into current database.
5. If the member number of the importing record has already existed in current database, this new data record will replace(overwrite) the old record (which with the same member number) in the original database.

Remark: Import massive member records into database might change lots of data of system database. Suggest to backup the whole database before doing it.

Importing File: C:\Users\DESKTOP\DOC\JL7E\MEMBER_EXCEL_20141229.XLS

Choose the Excel File for Importing: Load Excel Data in

Status	Member No.	Salutation	First Name	Last Name	Gender	Home Phone	Work Phone	Cell Phone	Email	Cat No.	Address
EXISTING	000001	Ms.	Janice	G. Barrett	Female			803-826-5530	Washington	E305	4108 Village View Drive Frederick, MD 21701
EXISTING	000002	Mr.	Kana	Asano	Female	914-513-761				E305	899 Mount Taber New York, NY 10013
EXISTING	000003	Miss	Lara	J. Drumm	Male	605-283-077			Litrumm@ku	E205	2807 Elm Drive Hawner, SD 57448
EXISTING	000004	Mr.	Jode	Stewart	Female			720-449-50		E305	207 Clay Lick Road Englewood, CO 80112

☐ Empty member number/Non-unique member number, will not add into database.

Save to Database Close / Exit

Loaded member records for importing: 12 member records, and 0 member records are not acceptable.

Acceptable records for importing: 12 member records. ☒ Replace the original record when importing the existing member number in database

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:

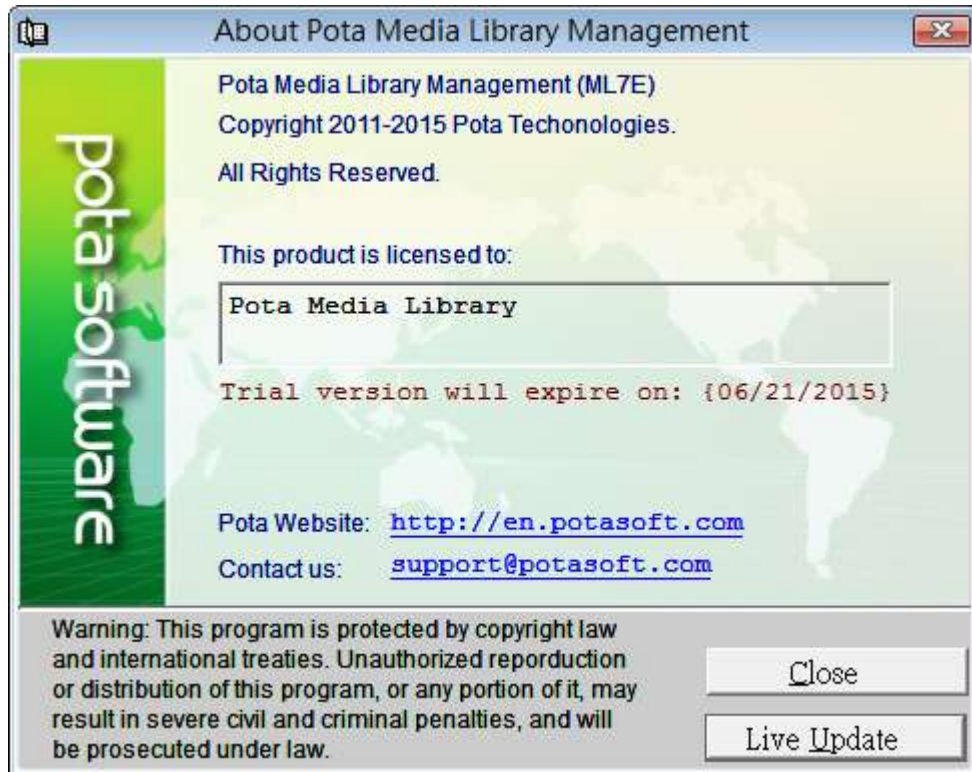
Menu >Tools > Export Data to Excel > Export All Member Records to Excel

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).