

# **LibraryWorld User Manual**

**Revised February 2012  
July 2010**

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## Introduction

The AutomateME project is the result of a grant received by the Central Maine Library District Association on behalf of the Maine Regional Library System, part of the Maine State Library, from the Stephen and Tabitha King Foundation to automate small public libraries in Maine. The intent of the grant was to select approximately twenty small libraries to receive two computers, a one-year subscription to the LibraryWorld software, along with consulting, planning and training assistance.

Automation makes a library's collection available online not only to local patrons but to library patrons statewide. Resource sharing is important to small libraries with limited budgets. Small libraries need this project to bring them up to today's standards and so that they can be viable in their community and in the larger Maine library world.

## Useful Information

LibraryWorld Account Name: \_\_\_\_\_

LibraryWorld Password: \_\_\_\_\_

LibraryWorld Customer Support: 1-800-852-2777  
FAX 1-408-993-2147  
[custserv@libraryworld.com](mailto:custserv@libraryworld.com).

Valerie Osborne,  
NMLD Consultant 1-800-427-8336, x 114  
947-8336 x 114  
[valerie.osborne@bpl.lib.me.us](mailto:valerie.osborne@bpl.lib.me.us)

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[bissonnette@portland.me.lib.us](mailto:bissonnette@portland.me.lib.us)

Susie Strout,  
Circuit Rider 207-359-2361 home  
207-632-2758 cell  
[susie@msln.net](mailto:susie@msln.net)

Brodart 1-888-820-4377  
Barcode product number 308 88 001  
2" X 5/8" laminated single

## Steps in Automating Your Library

1. Begin re-registering your patrons for their barcoded library card. **DO NOT AUTOMATICALLY ASSIGN A BARCODE TO EVERY PATRON YOU CURRENTLY HAVE LISTED.** Some of these people may have moved or passed away. This is the perfect time to purge your patron records and get current address and phone number information for your currently active patrons. Don't waste barcodes on people no longer in your area.

2. Be sure to collect your patron's email address because the system will allow you to email overdue notices and other news.
3. You should have thoroughly weeded your collection prior to beginning the automation process. As you convert your items to the online system, you have another opportunity to be certain that you really need the item in your collection. Don't add items that are outdated, worn out, or have not circulated in at least 5 years unless the item is unique or pertinent to your local area (see the weeding matrix in Appendix 6).
4. Begin adding cataloging records following the instructions on page 16.
5. You can begin using the system for circulation whenever you choose. You can add records as people check the items out or you can jot down the ISBN number to add the record after the patron leaves.
6. If you have any questions about this process, don't hesitate to call your district office.
7. We have purchased your first batch of barcodes from Brodart. They are item number 308 88 001 which is the 2" X 5/8" laminated single barcode. The barcode format is 14 digit Codabar (MOD10) with 2 indicating a patron record and 3 indicating a material record.
8. This first contract with LibraryWorld will run from November 1, 2010 through October 31, 2011. Approximately 30 days prior to the end of this first year, you will be billed by the Central Maine Library District Association for the annual renewal fee that you committed to when you accepted the grant.

# LibraryWorld Overview

Each of these menu items allows you to access a specific function (or module) of the program. These items are explained more fully in following sections.



## **Catalog:**

- Provides a full listing of all items in the collection
- You can search by title, author, subject, or any 'keywords'

## **Patrons:**

- Provides a list of all library patrons and contact information
- Shows the items they currently have checked out
- Shows due dates for all items checked out and any fines currently owed
- For youth patrons (under 18) the record will indicate whether the young person is allowed Internet access without his/her parent or guardian being present

## **Circulation:**

- Checks items out to the patron's account
- Checks returned items back into the system
- Records fines paid or owed
- Allows for renewal of items already checked out to the patron
- Allows an item to be put on hold when requested by a patron

## **Serials**

- Allows tracking the receipt of magazine subscriptions
- Contains vendor information for magazine subscriptions

### **Inventory**

- Allows for the inventory of the collection by entering the bar code number of each holding that is on the shelf
- Prints a missing items report

### **Reports**

- Print holdings reports by author, title, call number, subject, barcode number, and modification date
- Print hold lists, reserves, overdue notices and letters, patron lists by name or barcode number and fines owed lists and letters
- Print circulation activity reports and top title and top patron reports
- Print spine labels, OPAC activity reports and other catalog information

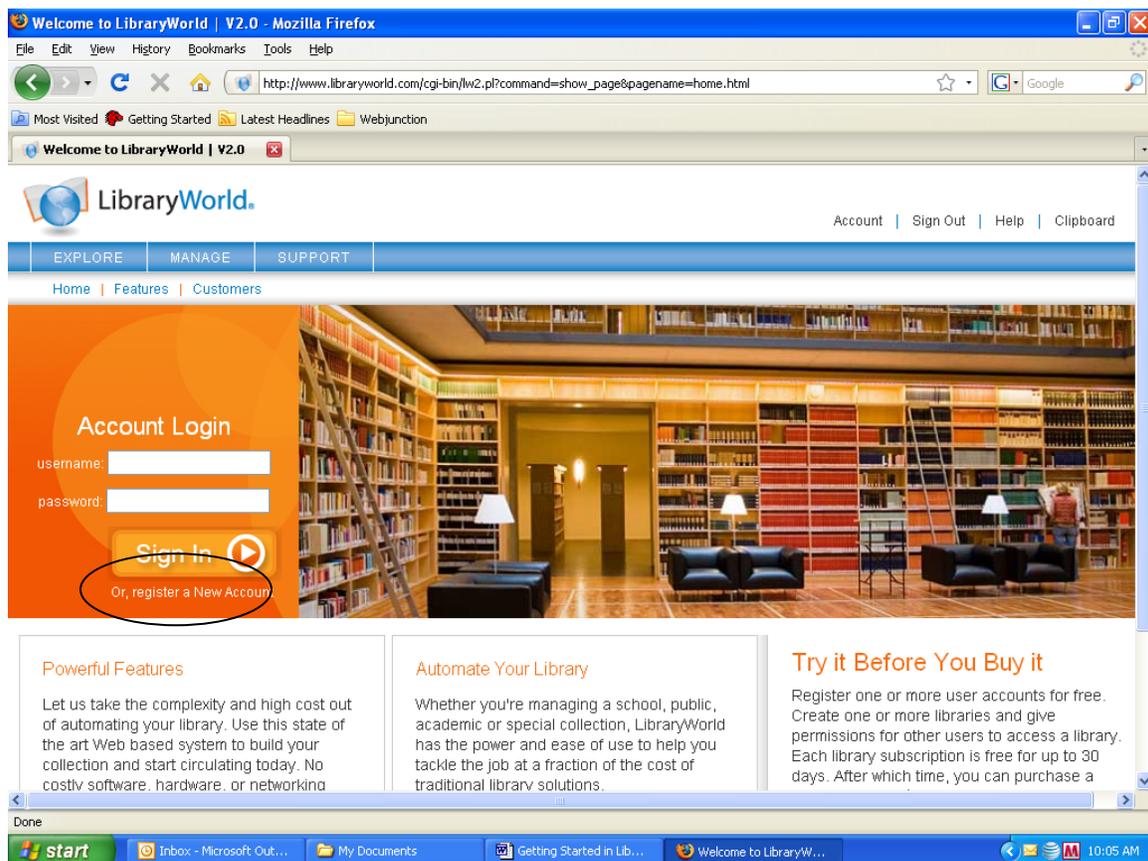
### **OPAC: The Online Public Access Catalog**

- Allows patrons to determine what items are held by the library
- Allows patrons to see whether the item is currently checked out

# LibraryWorld Setup

## *Establishing Your Account*

Create your account by logging into LibraryWorld at <http://www.libraryworld.com> and creating a new account.

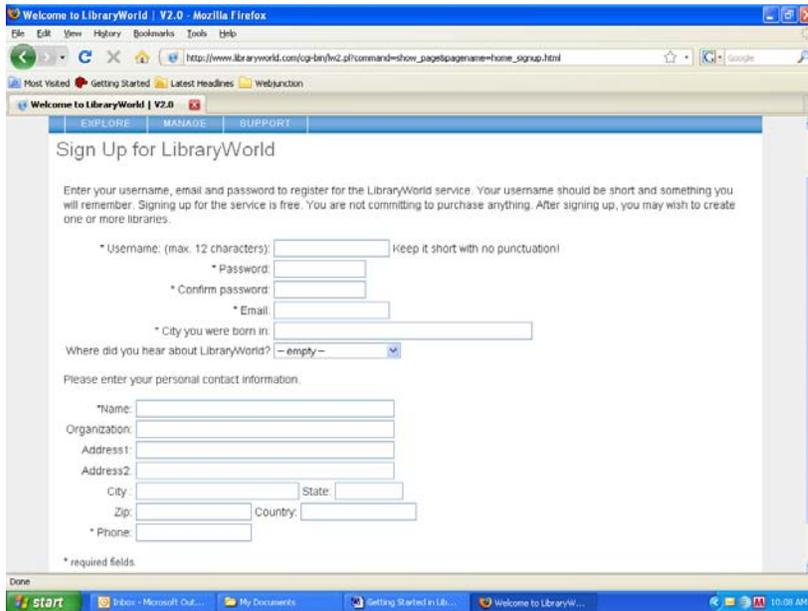


To create an account, you will need to choose a name for your library's file. This name is limited to 12 characters and no punctuation. Choose something that reflects the name of your organization.

Next, choose a password and confirm the password. Make this something that you will remember. You will need it to access your account with LibraryWorld but not to access your catalog on a daily basis.

The account requires an email address. If the library doesn't have one, contact Susie Strout, the Circuit Rider (home: 207.359-2361 or cell 207.632-2758 or email: [susie@msln.net](mailto:susie@msln.net)), to get one set up for free as part of your MSLN connection or set up a

free account with Yahoo or Google. Fill in the rest of information and click **SIGN UP** at the very bottom of the screen.

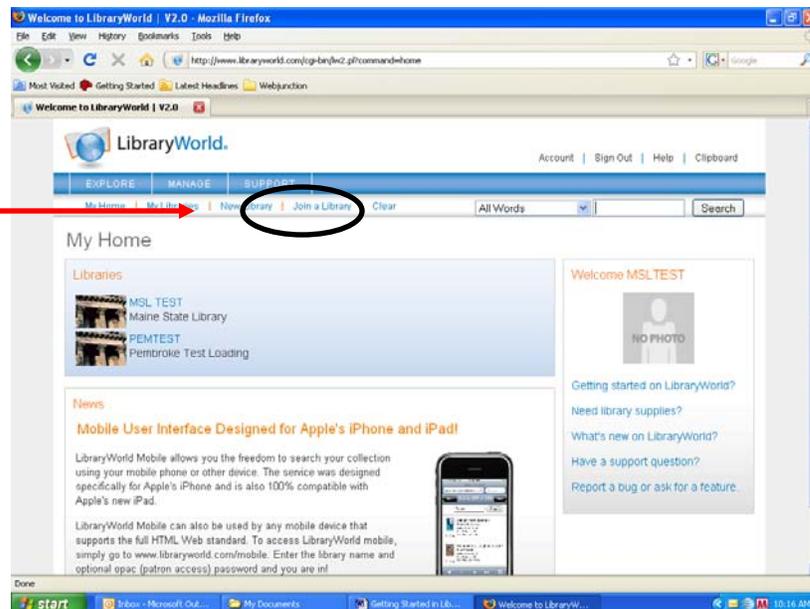


The screenshot shows the 'Sign Up for LibraryWorld' page in a Mozilla Firefox browser. The page title is 'Sign Up for LibraryWorld'. Below the title, there is a paragraph of introductory text. The form contains several fields: Username (max 12 characters), Password, Confirm password, Email, City you were born in, and a dropdown menu for 'Where did you hear about LibraryWorld?'. Below these are fields for personal contact information: Name, Organization, Address1, Address2, City, State, Zip, Country, and Phone. A note at the bottom indicates '\* required fields.'.

## Setting Up Your Library

Now that you have set up an account, you must create your library. To create a new library:

Select the '**NEW LIBRARY**' link in the box titled '**LIBRARIES**' on the home page.



1. Fill in the appropriate information. Make sure the library name is short and avoid all punctuation marks.
2. Select the **SAVE** button at the bottom of the page. The new library will be created and you will be taken to a page similar to the one shown above. To get started, click on the name of your library.

## LibraryWorld Settings

Before you begin to use LibraryWorld, you need to customize the software with your library's information. Go to **SETTINGS** to do that.

Welcome to LibraryWorld | V2.0 - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://s3.libraryworld.com/cgi-bin/lw2.pl?command=settings

Most Visited Getting Started Latest Headlines Webjunction

Welcome to LibraryWorld | V2.0 LibraryWorld Version 2.0 Home Page

LibraryWorld.

Account | Sign Out | Help | Clipboard

EXPLORE MANAGE SUPPORT

MSL TEST

Catalog Patrons Circulation Serials Inventory Reports Settings OPAC

Library Settings

[General](#) Edit the library's address, hours, default circulation period and fines.

[Library Name](#) Change the name of the library.

[Permissions](#) Allow other users to help manage the collection.

[Subscription](#) View current library subscription and renew if appropriate.

[Policies](#) Change circulation default policies and customize policies for patrons and holdings.

[IP Security](#) Set preferences for Internet Level security.

[Calendar](#) Set the weekdays and holidays to skip when defining due dates for check out items.

[Routing Lists](#) Managed routing lists for serial tracking holdings.

[OPAC](#) Announcements and links to display in the default home page.

[Union OPAC List](#) Display the Union OPAC List of Libraries.

Done

start Inbox - Microsoft O... My Documents Welcome to Library... Library World Imple... Document1 - Micros... 12:01 PM

Just work down the list starting with the **GENERAL** link. (See the screen shot on the next page)

On the **GENERAL** settings page, type in the library's name, address, and phone number. If your library doesn't have a generic or reference library email, you should consider setting one up to keep from using the director's personal email account as the main contact for the library.

Add your library's schedule. You can put in both winter and summer hours if they are different. Use the drop down menu to choose type of library. Even if your funding is from private sources, you are a public library. Ignore the Call Number Location Tag and Subtag boxes. Allow **GUEST ACCESS** by typing a 'Y' in the box. Hit the **SAVE** button in the middle of the page at the bottom of the screen.

The screenshot shows a Mozilla Firefox browser window displaying the 'Settings > General Settings' page for a library named 'MSL TEST'. The page contains a form with the following fields and values:

- Name of Library: MSL TEST
- Organization: Maine State Library
- Address1: 64 SHS
- Address2: (empty)
- City: Augusta State: ME
- Zip: 04333 Country: USA
- Phone: 207 287-5632 Email: stephanie.zurinski@mai
- Days and Hours that are open: M-F 8-5
- Type of Library: Public (dropdown menu)
- Call Number Location - Tag: (empty) Subtag: (empty) Leave blank if using call number in Holding record.
- Guest Access (Y/N): y

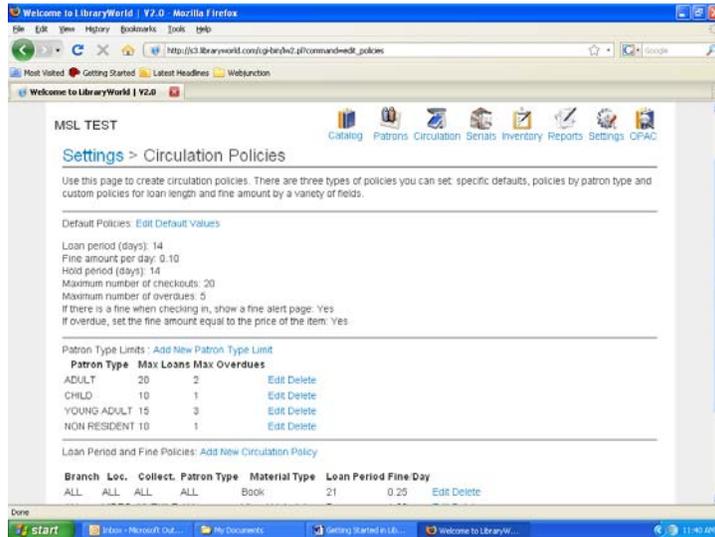
A 'Save' button is located at the bottom center of the form. The browser's address bar shows the URL: http://s3.libraryworld.com/cgi-bin/lw2.pl?command=edit\_general. The taskbar at the bottom shows several open applications, including 'start', 'Inbox - Microsoft Out...', 'Welcome to LibraryW...', 'Library World Imple...', and 'Getting Started in Lib...'. The system clock shows 1:51 PM.

When you have saved the **GENERAL** settings, click on the blue **SETTINGS** link to go back to the **SETTINGS** menu.

The next settings link allows you to change the name you originally chose for the file name of the library when you set up your LibraryWorld account. If you are happy with the name you chose, then you can skip this setting. If you would like to change the file

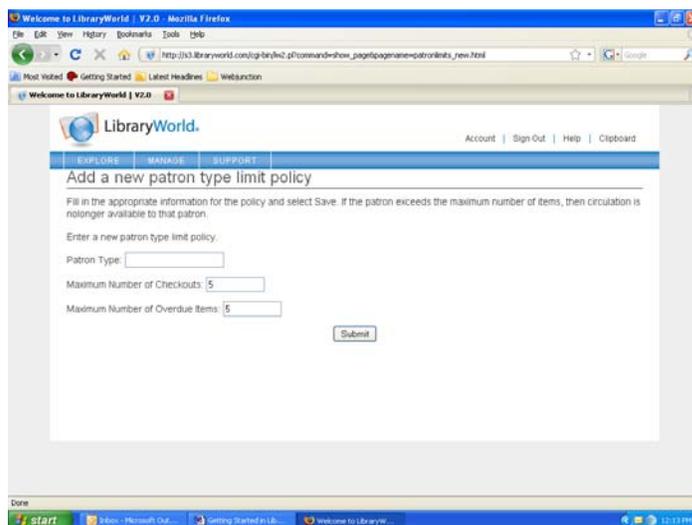
name then click on the **LIBRARY NAME** link. Type in the new name and the password you created when you set up your account. Click the **SAVE** button.

Move on to the **POLICIES** settings. This is where you will set up your patron types and the circulation periods and fines for various item types.



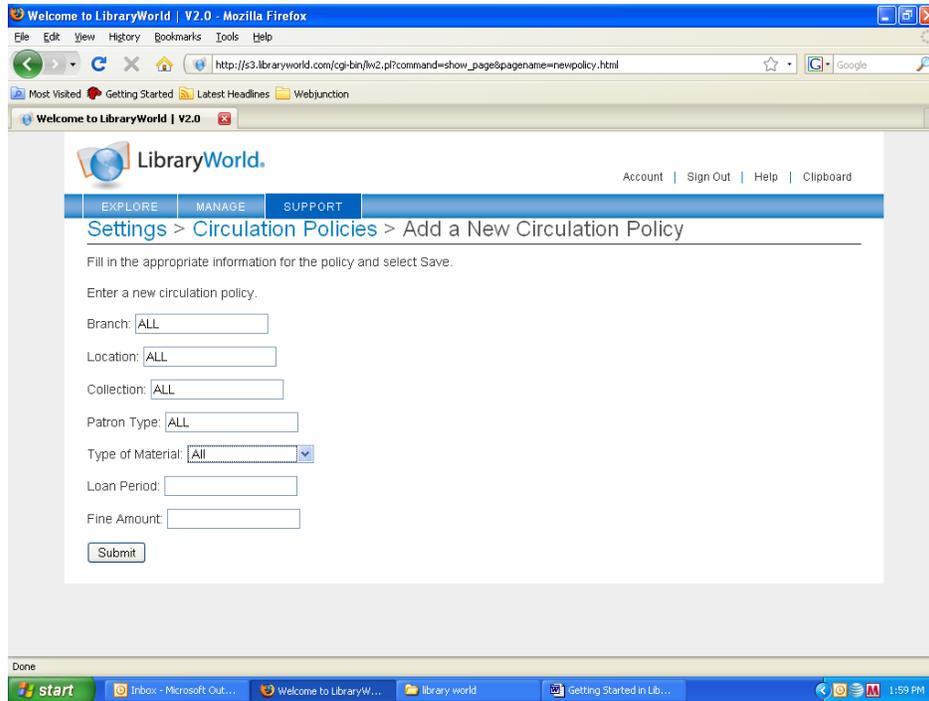
The default settings are generic settings that the system will use if no other specific setting is available. Set the defaults for your standard checkout period, fine amount, etc.

Set up your patrons to include **at least Child, Young Adult, Adult and Non-Resident**. If you have an influx of summer visitors you might want to differentiate between temporary non-residents and other non-residents. If you receive funding from other towns, you might want to set up a patron type to reflect the town of residence. Click on **ADD NEW PATRON TYPE LIMIT**.



Type in the patron type (Adult, etc.). Then, type in the maximum number of items that type of patron is allowed to have checked out at any one time. The second box is the maximum number of overdue items that patron is allowed to have at any one time before their circulation privileges are impacted. These limits may differ from patron type to patron type depending on your written circulation policies. When you finished entering the information for that patron type click **SUBMIT**. Continue this process until all patron types have been set up.

Finally, you can set up circulation periods and fines for different types of items.



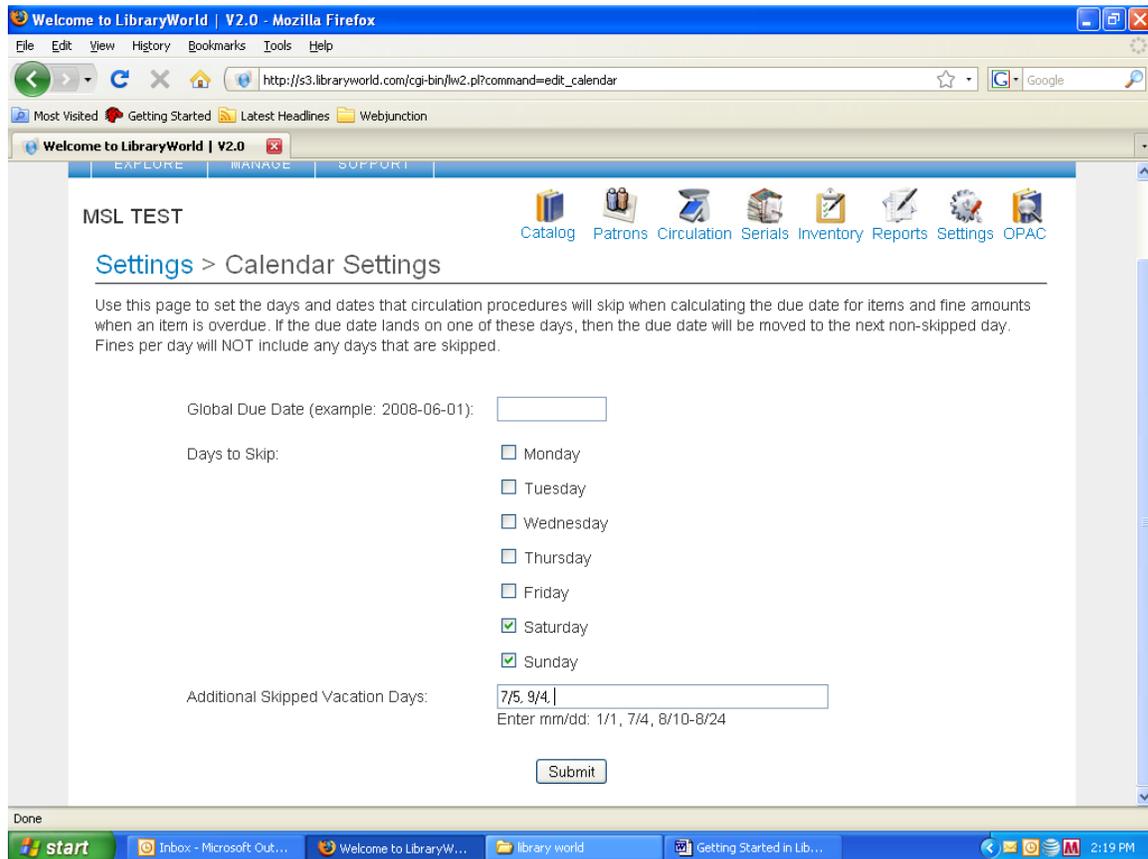
Material circulation policies for LibraryWorld can be different for different branches, locations, collections and patron types. It is important to be consistent in the way you use these fields. We recommend using **BRANCH** for different buildings. Most libraries have only one location so this field will be blank. Use **COLLECTION** for Adult, Juvenile and Young Adult and use **LOCATION** for genre (Maine, Mystery, Romance, etc.)

For example, you might have higher fines for media than you do for books. You might have different circulation periods for fiction movies and non fiction movies. Or, you could circulate children's movies for a longer period than ones for adults.

In the case of a longer circulation period for children's fiction movies, you would click on **ADD NEW CIRCULATION POLICY**. Select **VISUAL MATERIAL** from the drop down menu labeled **TYPE OF MATERIAL**. Leave the **BRANCH** field as it is (ALL). Leave **LOCATION** blank unless you assign genres or a type designation (VHS or DVD) to your movies. For **COLLECTION** type Children. For **PATRON TYPE**,

leave it as is (**ALL**) since this policy should apply to all patrons. Then, enter the loan period (in days) and the fine amount per day. Click the **SUBMIT** button. Continue in this way for any other material type or collection you wish to have a stricter circulation policy for.

Return to the **SETTINGS** menu by clicking on the blue **SETTINGS** link. The next policy to consider is the **CALENDAR**. Click on this link.

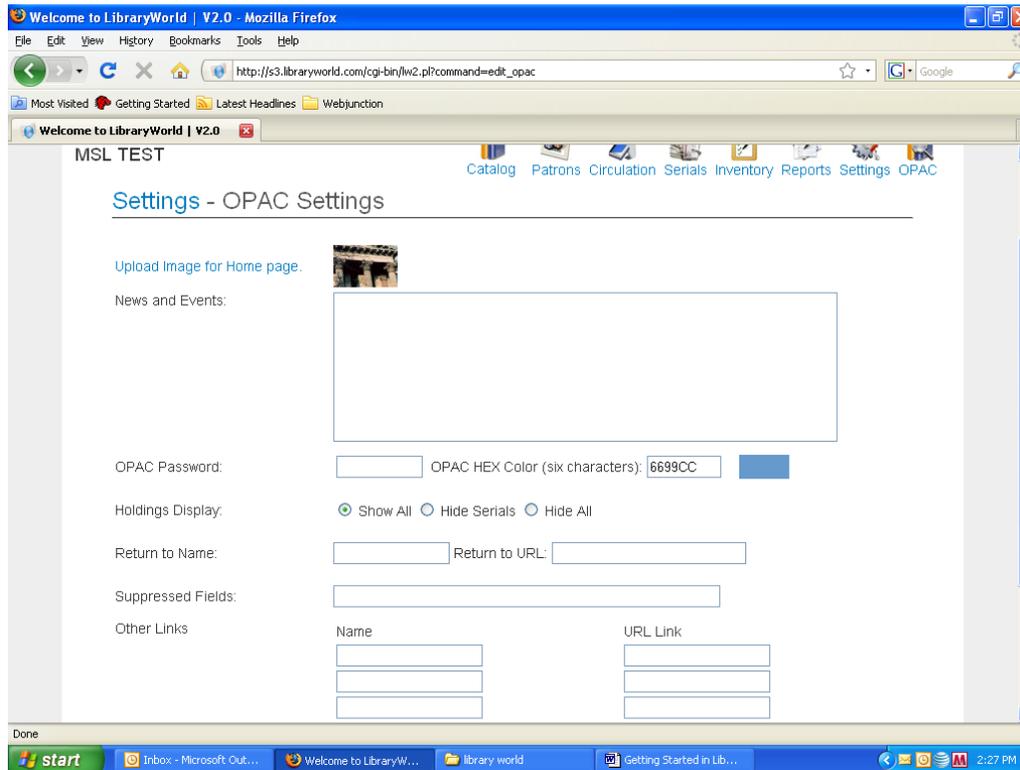


Skip the **GLOBAL DUE DATE**. This doesn't really have an application in public libraries. Click in any of the boxes next to the days of the week that you are closed. This tells the system not to calculate a due date that would fall on a day you are closed. The system also will not calculate fines on closed days. In the box labeled **ADDITIONAL SKIPPED VACATION DAYS**, enter holidays like July 4 or Thanksgiving. Some of these dates will need to be changed each year. For example, Christmas always fall on 12/25 but Thanksgiving's date changes from year to year.

When you have finished updating the **CALENDAR**, click the **SUBMIT** button to save these changes. Go back to the **SETTINGS** menu and click on **OPAC**.

The **OPAC** (Online Public Access Catalog) is the interface that your patrons will use to search the catalog. LibraryWorld gives you the ability to create a website around the

catalog with this settings page. You can upload an image of your library, display news, change the color and offer your patrons links on this website.



You can upload an image of your library from a file on your computer. Click on **UPLOAD IMAGE FOR HOMEPAGE** and follow the instructions to browse to the image file.

The **NEWS AND EVENTS** box cannot be formatted. Anything you type in the box will appear as a paragraph on the OPAC website.

If you want to change the color of your **OPAC** website, you have to have the **HEX** code for the color. You can visit <http://www.colorschemer.com/online.html> to locate a HEX code you like. When you find it, just copy and paste the alphanumeric sequence into the box. The color won't change on this page but it will appear on the website.

If you want your patrons to be able to return to another website when they leave the OPAC, type the name in the **RETURN TO NAME** and the correct URL in the **RETURN TO URL** boxes. For example, if you want your patrons to return to the town's website, you would put that information in these boxes. Ignore the **"SUPPRESSED FIELDS"** box.

**OTHER LINKS** allows you to give your patrons value-added information. For example, you could put the Library Value Calculator here or the link to renew your driver's license or get a moose permit. Think of things your patrons can really use.

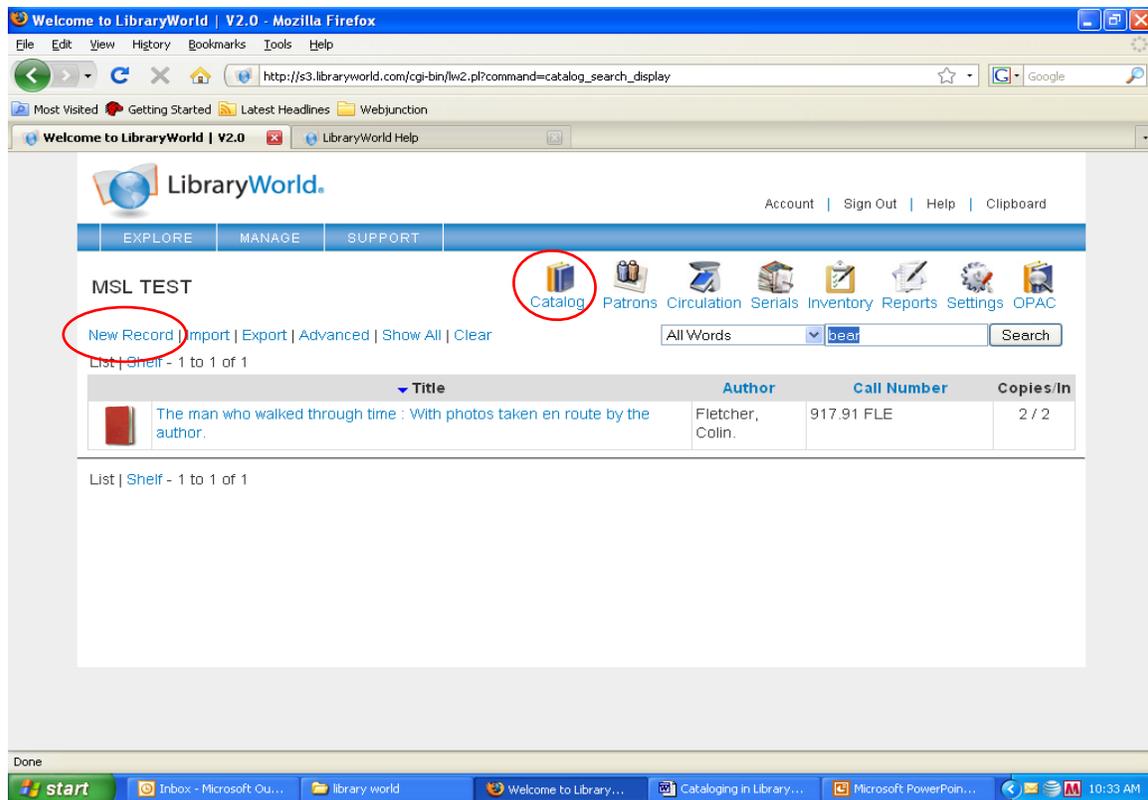
When you have finished setting up your links, click the **SUBMIT** button. That completes the major set ups necessary for LibraryWorld to operate for you.

## Catalog Module

### *Cataloging with LibraryWorld*

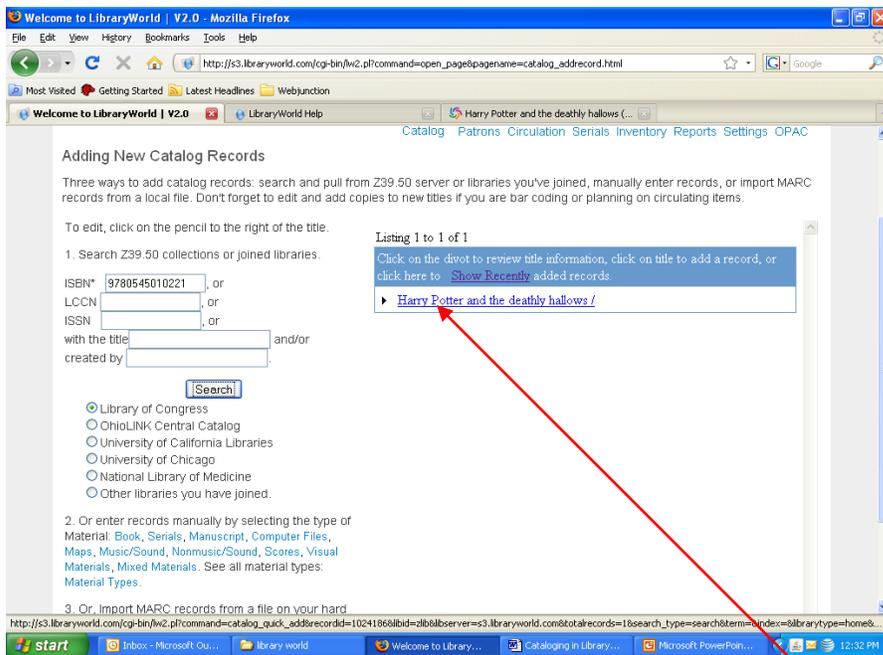
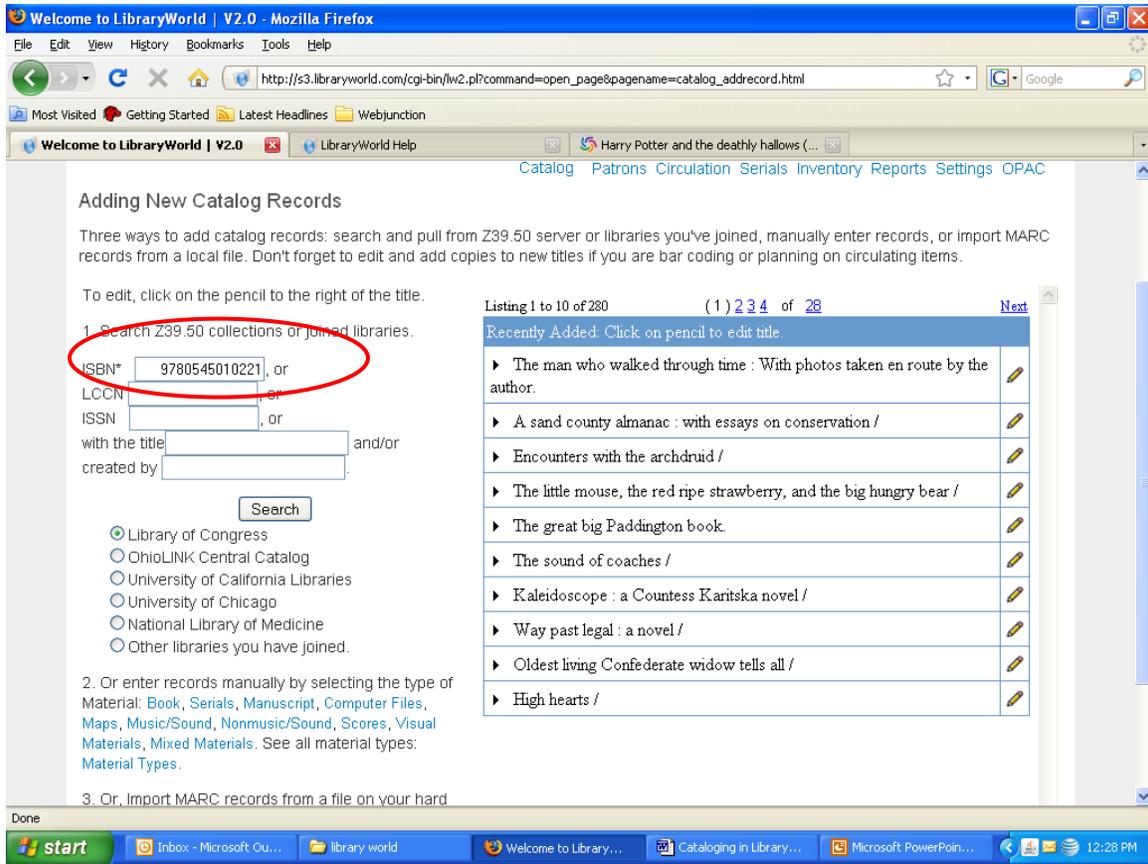
LibraryWorld utilizes the Z39.50 protocol which enables you to download MARC records from other libraries. This is the fastest and easiest way to add records to your system.

Click on **CATALOG** then click on **NEW RECORD**.

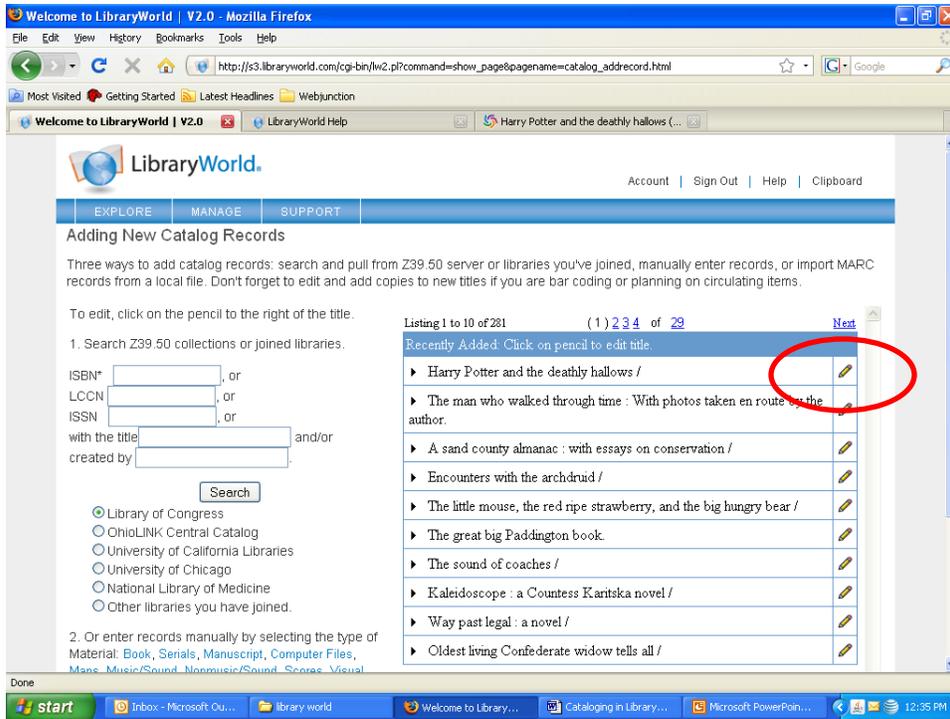


The next screen allows you to search for the item you want to catalog by ISBN, LCCN, ISSN or title and author words. The most efficient way to search is by ISBN if it is available.

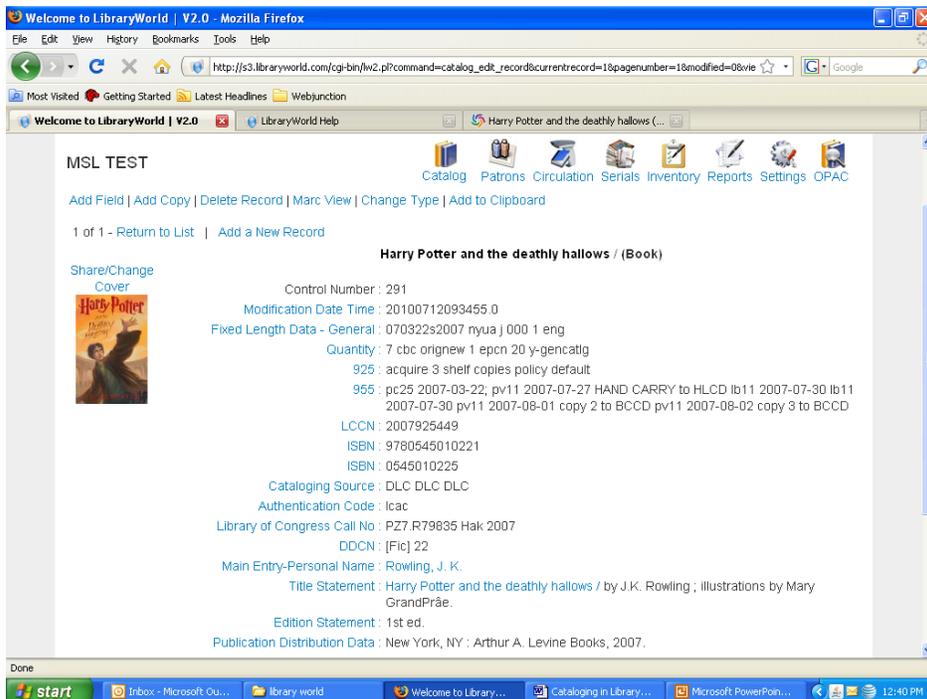
Enter the ISBN in the appropriate search box and hit **SEARCH**.



This is the result screen showing that the record has been found. Click on the blue title in the right center of the screen.



Now, click on the **PENCIL** that is to the right of the title you want to add.



This screen allows you to view the cataloging information you have added to your system. You can add fields in this view by clicking on the **ADD FIELD** link and choosing the appropriate field.

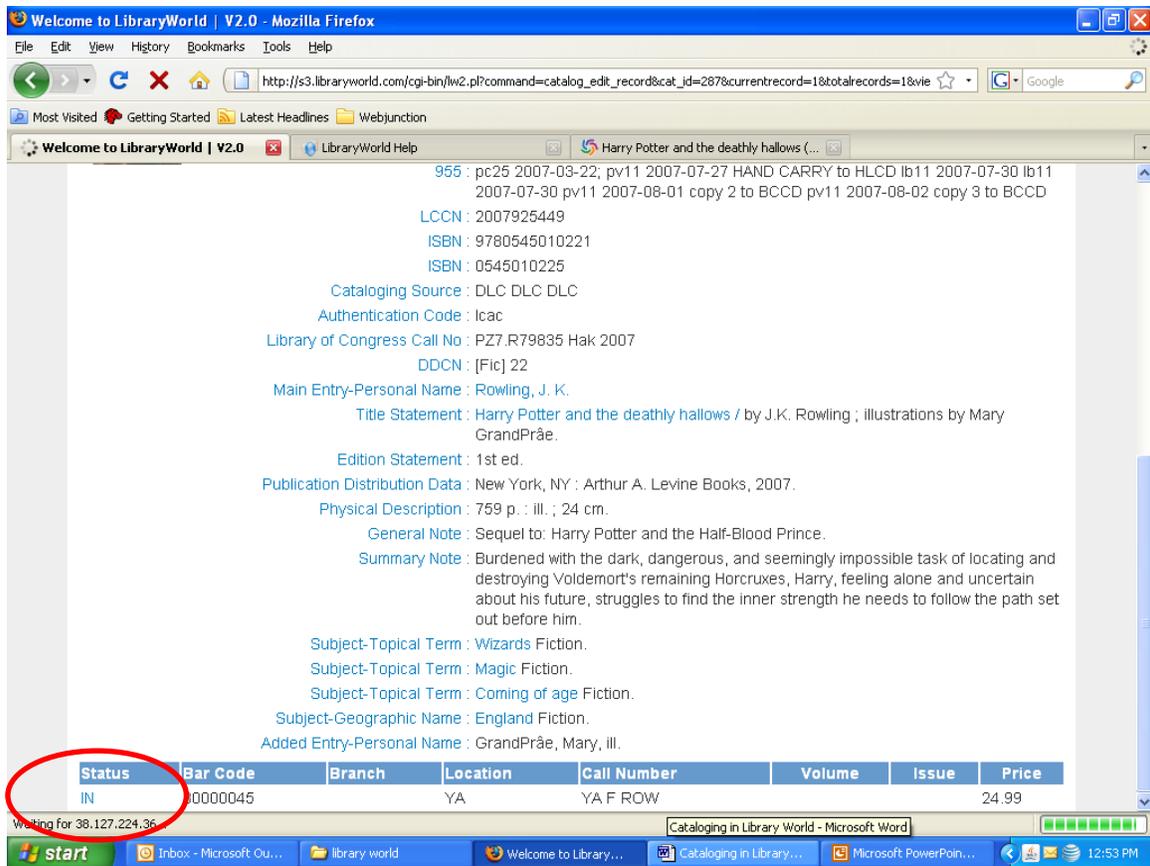
In order to completely add this title to your catalog, you have to **ADD COPY** which is the second link in the menu under the library's name.

Here, you will put in the barcode number, copy 1, Location, Collection, Call Number and replacement cost for the item. Replacement cost is the price you find on the book not the price you actually paid for it. Use the **COLLECTION** field to indicate whether the item is part of the Adult, Young Adult or Children's collection. Use the **LOCATION** field to indicate genre if desired especially if you shelve genres separately.

Once all the information has been entered for the item, click the **SUBMIT** button at the bottom of the screen.

The screenshot shows the LibraryWorld V2.0 web application interface. The browser window title is "Welcome to LibraryWorld | V2.0 - Mozilla Firefox". The address bar shows the URL: [http://www.libraryworld.com/cgi-bin/lw2.pl?command=catalog\\_editcopy&cat\\_id=328&currentrecord=328&totalrecords=8631&search\\_type=search&searchterm=&index=&modified=0&](http://www.libraryworld.com/cgi-bin/lw2.pl?command=catalog_editcopy&cat_id=328&currentrecord=328&totalrecords=8631&search_type=search&searchterm=&index=&modified=0&). The page title is "MSL TEST CATALOG". The navigation menu includes "EXPLORE", "MANAGE", and "SUPPORT". The main content area has a header "MSL TEST CATALOG" and a sub-header "Adding a Holding/Copy Record to: Clear and present danger /". Below this, there is a form with the following fields: Status:  Bar Code Number:  Copy No.:  Branch:  Location:  Collection:  Call Number:  Call Cutter:  Price:  Comments:  Loan Period:  Volume:  Issue:  Bound Indicator (y/n):  Publication Date:  Expected Date:  Received Date:  Below the form, there is a "Circulation Information" section with fields for Patron\_id, Patron Barcode, Patron Name, Checkout Date, Due Date, Fine Per Day, Last Patron To Checkout the Item, Last Patron Barcode, Last Patron Name, and Catalog Record ID (Internal): 32 Copy Record ID: 65 --->. A "Submit" button is located at the bottom of the form.

The next screen will allow you to view the record including the holdings data. If you need to modify the catalog record, click on the **ADD FIELD** link and make the modifications. If you need to modify the holdings data, click on the Blue Status indicator (**IN**) in the holdings area.



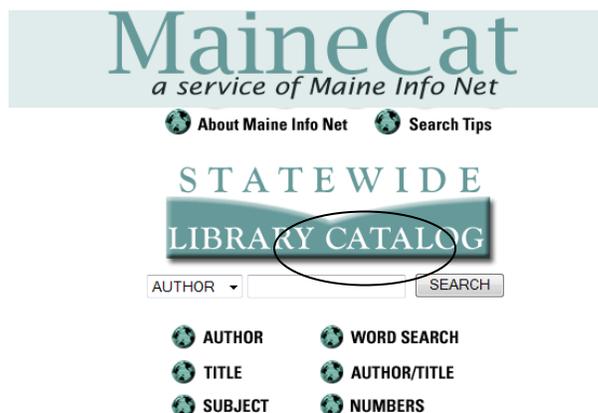
This will take you back to the holdings screen so you can make any additions or changes needed. Once you have submitted any changes or additions, the record has been added to your catalog.

## Downloading Records through MaineCat

If you are unable to locate a record in LibraryWorld by scanning/entering the ISBN, title or author, the record can usually be found in MaineCat. With LibraryWorld open, select New Tab in Your browser (for example: Internet Explorer or Mozilla Firefox) and then type in <http://mainecat.maine.edu> to access the MaineCat page. You will want to bookmark this site for future use.

Search either by Author or Title (selecting from the drop-down: Type in the Title or Author (last name, first) and then click “Search.”

In this example we will look for Great Big Paddington Book”



“The

Our search yields two choices. After looking at each entry, you decide the first is the one that is our book. Check the box next to the correct entry, and then click on “**SAVE MARKED RECORDS.**”

MaineCat STATEWIDE LIBRARY CATALOG

About Maine Info Net Search Tips

START OVER EXTENDED DISPLAY LIMIT/SORT SEARCH ANOTHER SEARCH EXPORT SAVED LISTS CLEAR SAVED RECORDS (Search History)

TITLE The Great Big Paddington Book Search

Save Marked Records Save All On Page

Num	Mark	TITLES (1-2 of 2)	Year
<b>The great big Paddington book</b>			
1	<input checked="" type="checkbox"/>	<a href="#">The Great Big Paddington Book</a>	
2	<input type="checkbox"/>	<a href="#">The Great Big Paddington Book</a>	1977

Save Marked Records Save All On Page

START OVER EXTENDED DISPLAY LIMIT/SORT SEARCH ANOTHER SEARCH EXPORT SAVED LISTS CLEAR SAVED RECORDS (Search History)

RESEARCH DATABASES | STATEWIDE LIBRARY CATALOG | INTERNET SERVICES | PARTICIPATING LIBRARIES

maine **INF** NET

You can continue to find and save records for several books. When you have completed your search, then click on **EXPORT SAVED LISTS** at the bottom of the page.

MaineCat STATEWIDE LIBRARY CATALOG

About Maine Info Net Search Tips

START OVER EXTENDED DISPLAY PREVIOUS RECORD CLEAR SAVED RECORDS

Format Of List		Send List To	
<input type="radio"/> Full Display	<input type="radio"/> E-Mail	Mail To: <input type="text"/>	
<input type="radio"/> Brief Display		Subject: MaineCat Export	
<input type="radio"/> Pro-Cite	<input type="radio"/> Screen		
<input type="radio"/> End-Note/RefWorks	<input checked="" type="radio"/> Local Disk		
<b>1.</b> <input checked="" type="radio"/> <b>MARC</b>			<b>2.</b>
	<b>4.</b> <input type="button" value="Submit"/>		

Your List of Saved Records			
Num	Mark	Exports (1-1 of 1)	Year
<b>3.</b>	<input checked="" type="checkbox"/>	<a href="#">The great big Paddington book</a>	

Remove Marked Records from This List

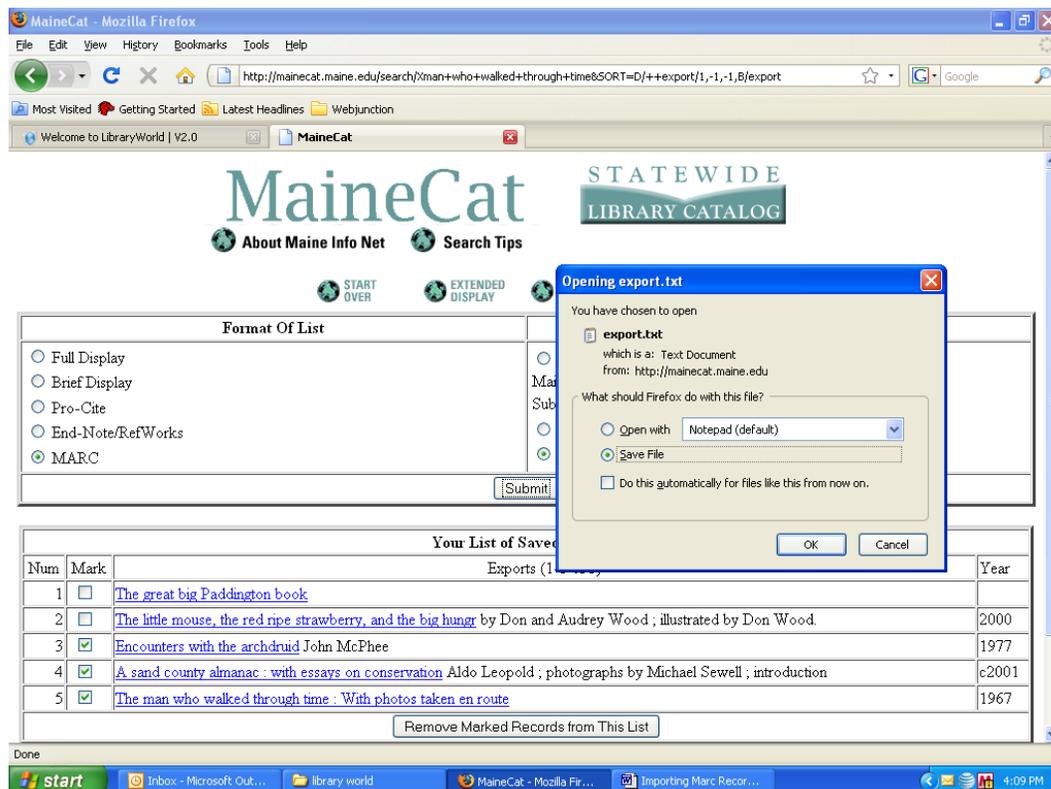
RESEARCH DATABASES | STATEWIDE LIBRARY CATALOG | INTERNET SERVICES | PARTICIPATING LIBRARIES

maine **INF** NET

We are going to export these Marc records to the computer, so will

1. choose MARC format,
2. choose Local Disk,
3. Check the books you want on the list of saved records.
4. Click SUBMIT

You will now see the screens below:

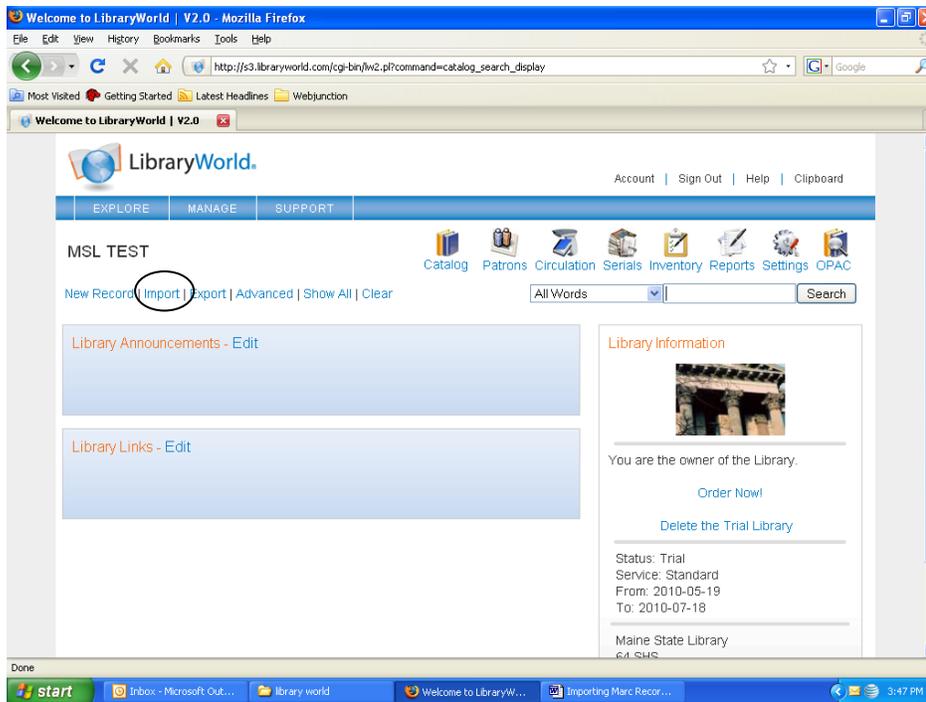


Choose **OK** and you will get a save dialog box. You will save the file to the Desktop and give it the name **“EXPORT1”**. If you do additional downloads, name them **EXPORT 2**, **EXPORT 3**, etc. (*At the end of the day, delete all that day’s export downloads.*)

- Choose **“CLOSE”** when the download complete screen appears.

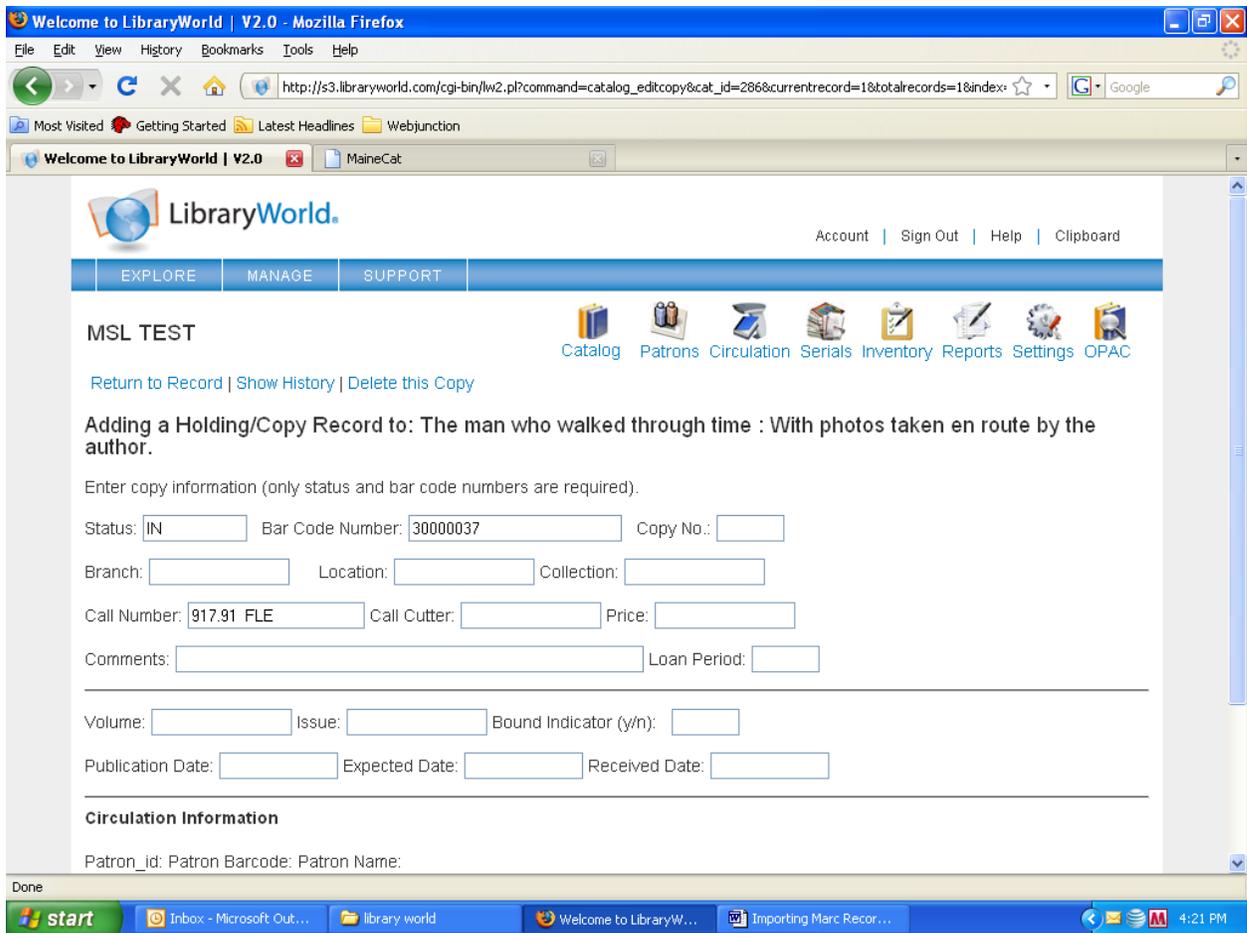
Now return to the LibraryWorld tab

- choose **CATALOG** and then choose **IMPORT**



When the **IMPORT MARC RECORDS** screen appears:

- Click on **BROWSE** and find the export file on the Desktop
- Click on the file and it will appear in the Select a file window
- Click **SUBMIT QUERY**
- Return to Catalog
- Click **NEW RECORD** and the imported records should appear in the “**RECENTLY ADDED**” box on the right
- Click on the **PENCIL** to the right of the title to edit the record
- Click on **ADD COPY** to input the local call number



Place the cursor in the box labeled **BAR CODE NUMBER**. Scan the barcode for the item into this box. Add the copy number (1 or 2, etc.) in the **COPY No.** box.

Leave **BRANCH** Blank.

Options for **COLLECTION** are:

ADULT

CHILDREN

YOUNG ADULT

Options for **LOCATION** include:

Mystery

Maine

Romance

Western

Science Fiction

Easy Read

Easy Book

Thriller

Large Print

Reference

Christian

Chapter Book

Put in your local call number in the **CALL NUMBER** box and put in the replacement cost of the item in the **PRICE** box. This is important for inventory purposes. Click the **SUBMIT** button at the bottom of the screen when you have finished.

## ***Other Sources for MARC Records***

WorldCat on MARVEL!: You cannot download records from WorldCat but you can enter the information from the WorldCat record into LibraryWorld. WorldCat is also a good source of Dewey numbers.

Amazon MarcConverter - <http://chopac.org/cgi-bin/tools/az2marc.pl>

- Click on "I Don't know the ASIN" which takes you to <http://chopac.org/cgi-bin/tools/azorder.pl>
- Then type in the title of the book to be presented with choices and get your Marc Records

THIS IS ESPECIALLY GOOD FOR Juvenile (even the old Golden Books)

## ***Deleting Catalog Records***

To delete a catalog record:

1. Go to the **CATALOG** module
2. Find the record you would like to delete
3. Click on the title of the record to view the MARC Record
4. Click on the "**DELETE RECORD**" link
5. Confirm the deletion of the record at the very top of the page by clicking on the "**YES, DELETE RECORD.**" link. If you mistakenly clicked on the "Delete Record" link, you can click on the "No, return to record." link

To globally delete all or a batch of catalog records:

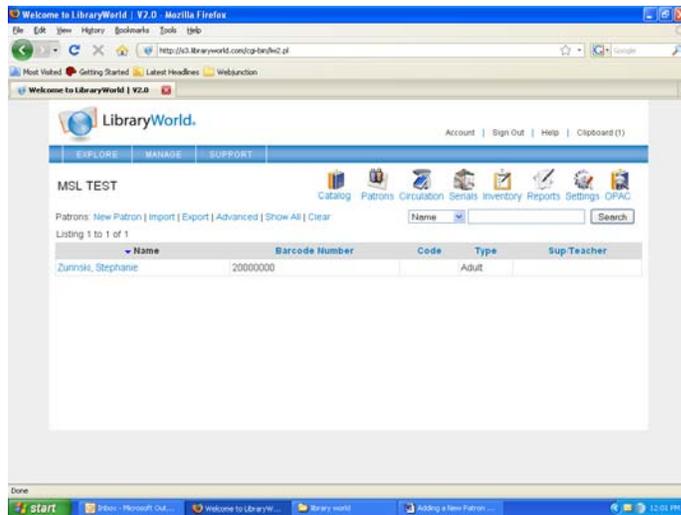
1. Go to the **CATALOG** module
2. Create a find set of the records you would like to delete using the basic, advanced, or range searching options. Make sure these are the correct records you would like to delete. If you would like to delete all records, simply click on **SHOW ALL**
3. After you verify your find set, click on the **ADVANCED** link
4. Go to the bottom section of the page called "**GLOBAL CATALOG DELETE**".
5. Click on the **GLOBAL DELETE** button. Catalog items checked out, on hold/reserve, or with owed transactions will not be deleted
6. To confirm deletion, please enter your password and click on the **GLOBAL DELETE** button. This action is permanent and cannot be undone

**\*Please note that catalog records cannot be deleted if they have active transactions.**

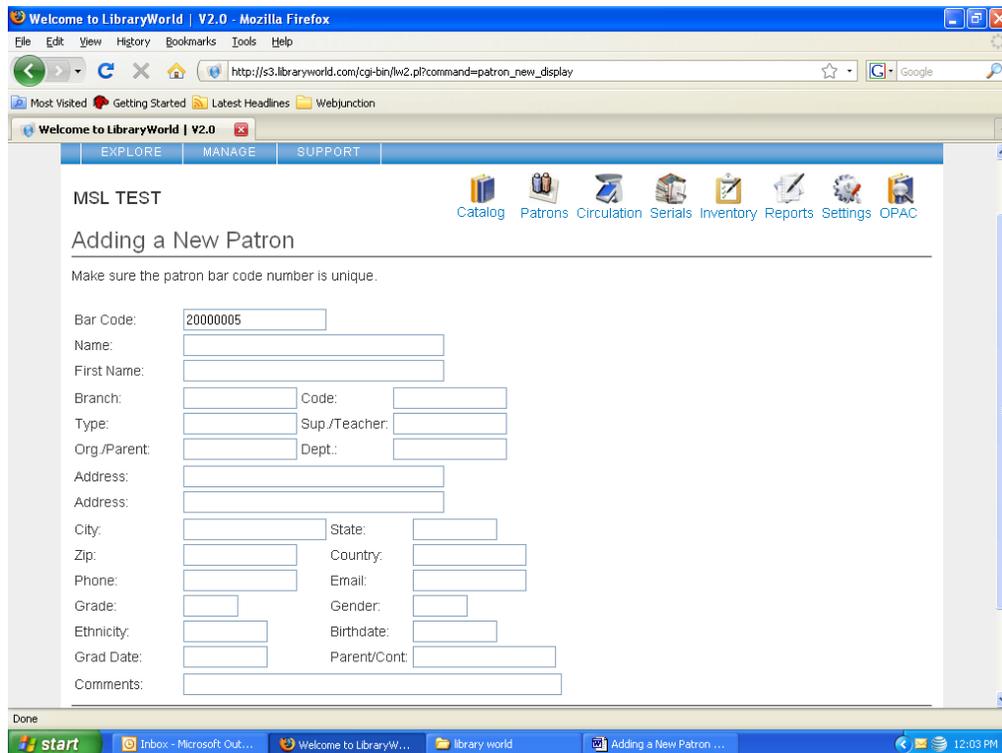
# Patron Module

## *Adding a New Patron to LibraryWorld*

Click on **PATRONS**. This screen will come up.



Click on **“NEW PATRON.”** An online version of a patron application will appear.



Fill in all the required information and then scroll to the lower left of the screen to **SUBMIT** the record.

## ***Editing Patron Records***

To edit a patron record, click on the **PATRONS** link in the menu. You can either search for the patron's name using the search box or click on **SHOW ALL** for the complete list of patrons. When you have located the patron that you want to edit, click on the patron's name (it will be highlighted in blue) to go to the data entry screen. Make any changes required and then click **SUBMIT**.

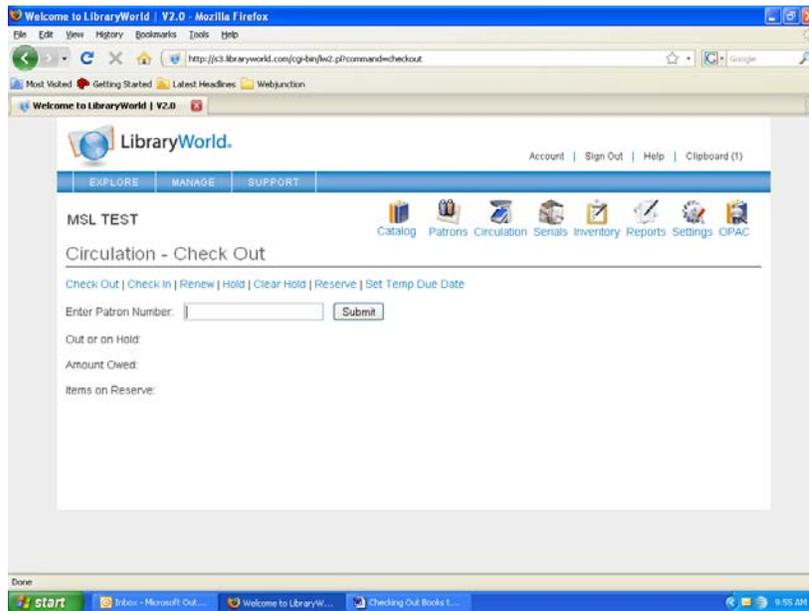
# Circulation Module

## *Checking Items Out*

After logging in to LibraryWorld

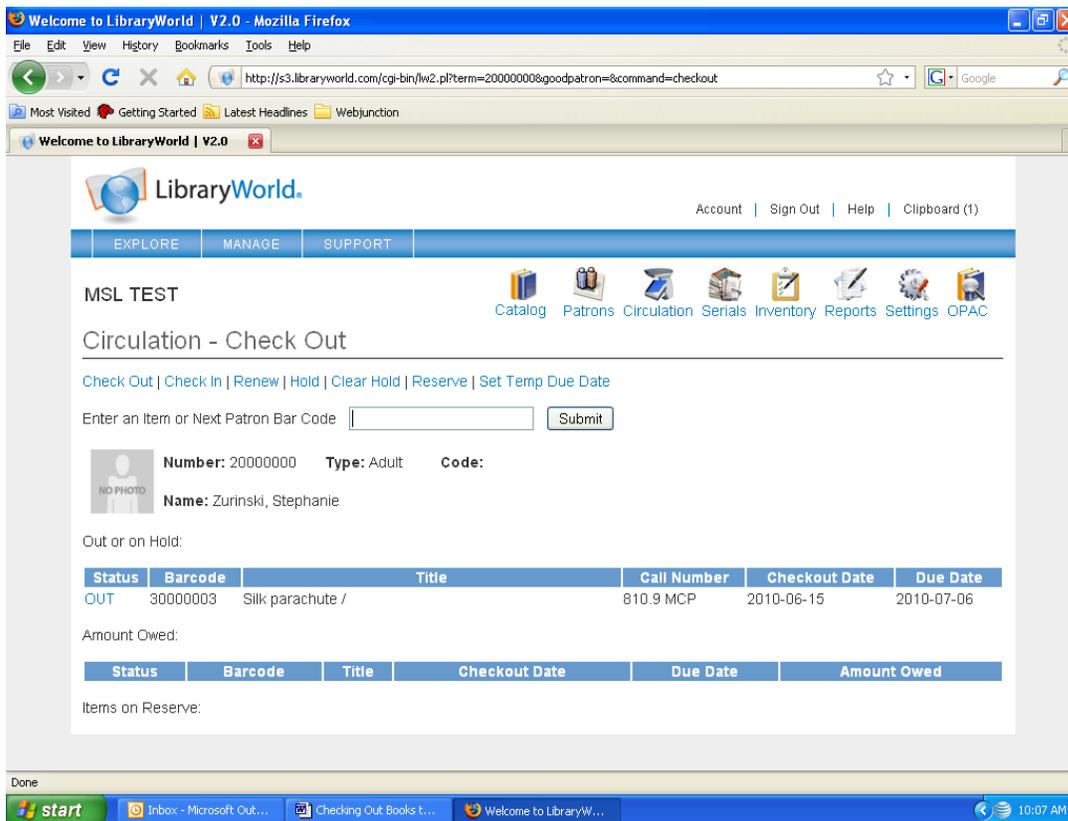
- Choose **Circulation** from the Menu

You will be taken to the **Check Out** screen.



- Click the mouse in the field **Enter Patron Number**
- Scan the bar code from the patron's card

When the scanner beeps, the barcode number will appear, along with the patron's record of items already checked out.



- Verify any upcoming due dates
- Renew any items if appropriate (see “How to Renew a Book”)
- Remind the patron of any fines due (see “How to Clear Fines”)

To check out new items:

- Click the mouse in the “Enter an Item or Next Patron Bar Code” Field
- Scan the item’s bar code

The item will appear showing

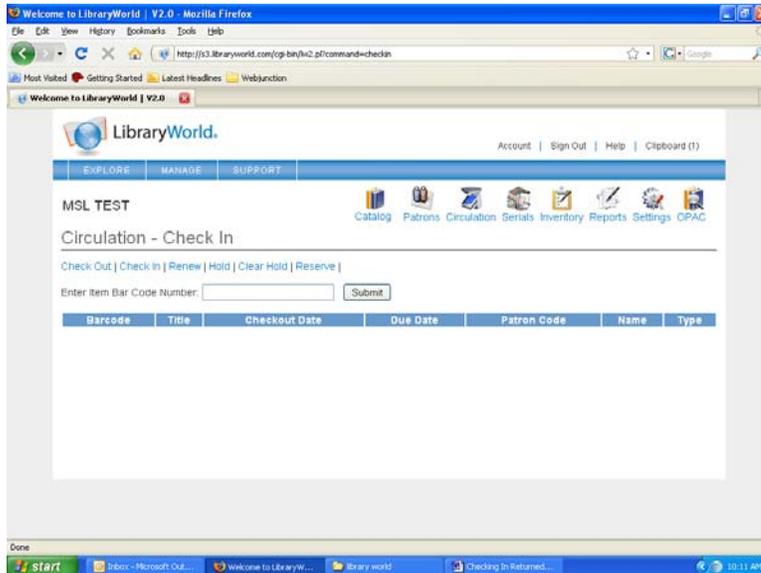
- Status= OUT
- The Barcode
- The Title
- The Checkout Date
- The Due Date

When you are ready to check out another item, simply scan the next bar code. *(You may need to click the mouse in the bar code field again.)*

## Checking In Returned Materials

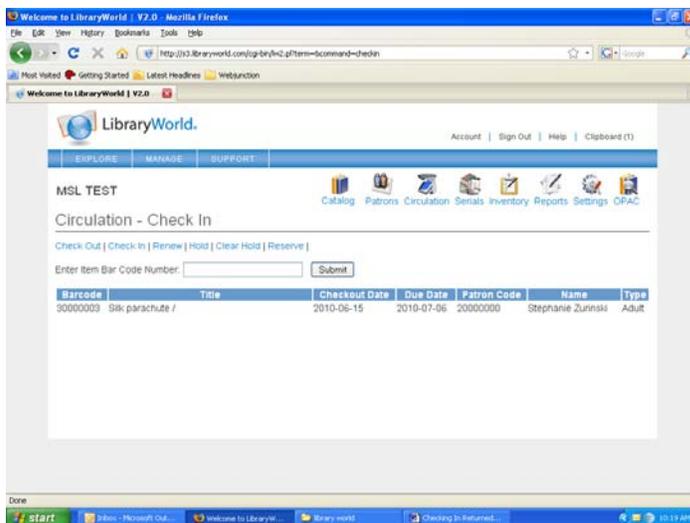
After logging in to LibraryWorld

- Choose **Circulation** from the Menu
- Choose **Check – In**



- Click the mouse in the “**Enter Item Bar Code Number**” Field
- Scan the item bar code
- Click submit

The following screen will show that the item has been returned to the system.



Continue checking in other items on the same screen by scanning the next bar code.

## ***Placing Holds/Renewals/Reserves***

### **Placing Holds**

By placing a hold on an item, you are telling the system that only a specific patron can checkout a specific item.

To place a hold on an item:

1. Select the **HOLD** button in the Circulation module
2. Type or scan in the bar code number of the patron you wish to hold an item for
3. Type or scan in the bar code number of the item that is being placed on hold
4. You can place multiple items on hold by scanning in additional items.
5. You can print a hold wrapper to place on the item by clicking **PRINT HOLD WRAPPER** which is next to the green print **HOLD HAS BEEN PLACED**

Once an item is placed on hold for a patron, only that patron can check an item out. Checking items on hold out to the patron is done using the checkout command.

### **Clearing a Hold**

To clear a hold on an item without checking the item out to the specific patron:

1. Select the **CLEAR HOLD** button in the Circulation module
2. Type or scan in the bar code number of the item you want to clear the hold on
3. If the item doesn't have a hold on it, then an error will appear
4. Otherwise, the hold will be cleared

### **Renewing an Item**

After logging in to LibraryWorld

- Click on your library, then
- Choose **CIRCULATION** from the Menu.

If you know the barcode of the item (e.g, the patron has the book in hand, or calls on the phone with the book in hand),

- Choose **RENEW** from the Circulation menu
- Enter the barcode number
- Click **SUBMIT**

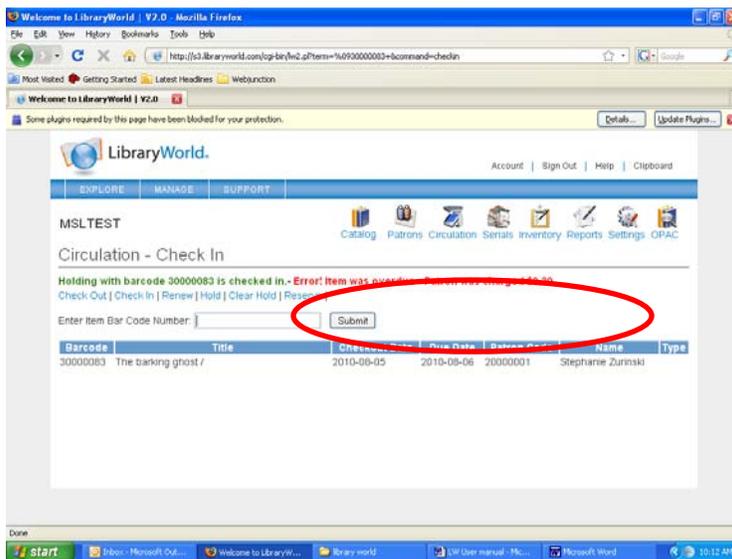
**NOTE:** If the book is overdue, the system will not allow a renewal. You will first have to check the book in, and then check it out again to accomplish the new due date. Fines will accrue.

## Reserves

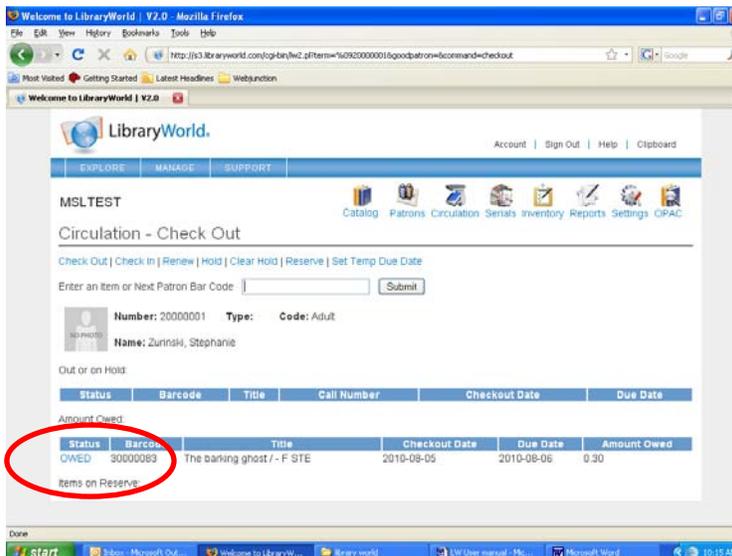
To reserve an item that is currently checked out, click on the **CIRCULATION** link, then click on **RESERVE**. Enter the patron's barcode number and click **SUBMIT**. Enter the item's barcode number and click **SUBMIT**. The item will appear in the patron's record as a reserve. To clear the reserve, click on the blue **DELETE** link that is to the right of the reserve record.

## Clearing Fines

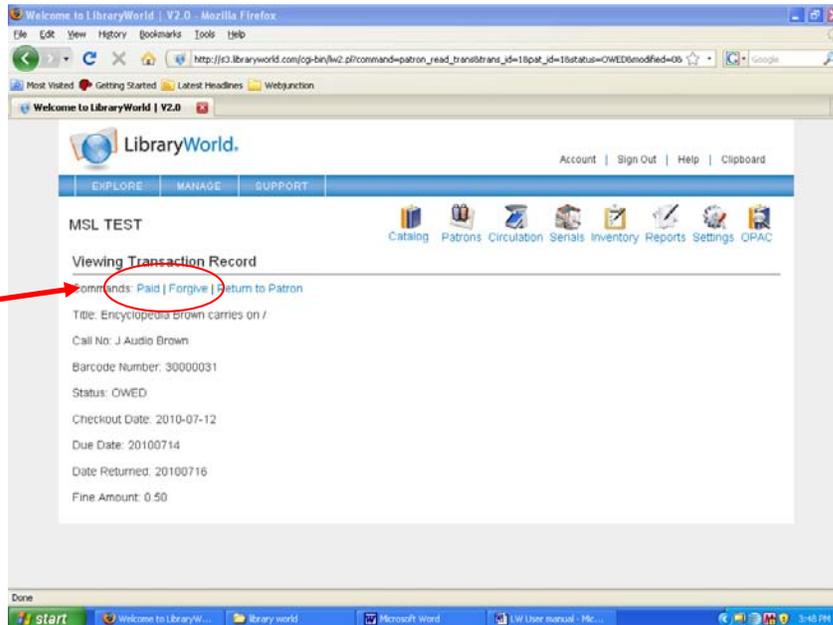
When an item is overdue, a message will appear when that item is checked in indicating that the item is overdue and the amount of the fine assessed.



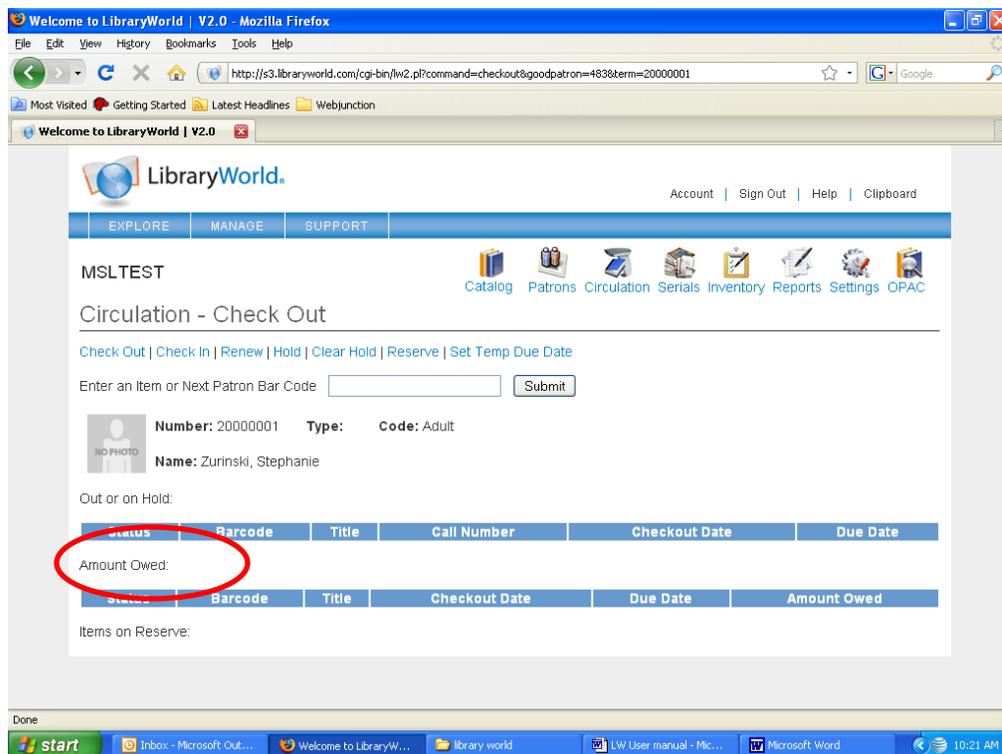
This screen indicates the patron who last had the item and their barcode number. When that patron checks out another item, the screen will indicate that a fine is owed.



To clear the fine, click on **“OWED”**. This will take you to the screen shown below. Click on either **“PAID”** or **“FORGIVE”** to completely clear the fine.



The system will then return you to the patron's record which will show no fines owed.



## **Serials Module**

### ***Creating Serial Records***

The Serials tracking module allows you to create a serial tracking record, receive serials, create holding records and automatically generate next expected records. It will also print overdue reports and letters.

To create a serial tracking record:

1. Select **CATALOG**
2. Add a new serial catalog record by either searching for the ISSN or by manually adding the title
3. Select **SERIALS** and add a tracking record for that title
4. Add the title frequency, and dates where appropriate. Make sure the ISSN matches the one you added in the Catalog record. Click the **SAVE** button

### ***Receiving Serials***

To receive serial items:

1. Select **SERIALS**
2. Select the correct title
3. Click on the **RECEIVED** button. A holding record will be created
4. Update appropriate fields, such as bar code number and click the **SUBMIT** button

### ***Searching Serials Records***

To search for serial tracking records:

1. Select **SERIALS**
2. Enter your search term and click the search button

# Inventory and Reports Modules

## *Inventory Module*

The Inventory Module allows you to inventory your collection by entering the barcode number of each item that is on the shelf and then printing an inventory (missing items) report.

**Note:** If you're going to do inventory with LibraryWorld, your call numbers must be in the holding (copy) record.

1. Enter the barcode numbers of items in a specific section of your library
2. Run the inventory report for the section of barcodes you just entered
3. Correct all errors for the inventoried section
4. Press the **RESET INVENTORY** button to clear the inventory flag from the items scanned

It is best to take inventory of an individual location or call number section and not try to do an inventory of the entire collection. If this is your first time doing an inventory, try a very small section first.

## *Entering Bar Code Numbers for Inventory*

There are two options for entering barcode numbers. You can type/scan them in one at a time or you can scan a large number of barcodes into a plain text file and upload them into the program all at once.

### **To enter one number at a time:**

1. Open the library and select **INVENTORY**
2. Type or scan in a barcode number
3. If a number is not found in the library, an alert will appear
4. Continue entering numbers for a Location or logical call number section of your library

### **Uploading a file:**

1. Using a scanner, keyboard or portable unit, enter multiple barcode numbers into a plain text file. The file must contain only plain text characters with each bar code number separated by a carriage return.

For example:

```
6000  
9523  
3454  
4476
```

2. Open the library and select **INVENTORY**
3. Select the **UPLOAD AN INVENTORY FILE** link
4. Click the **BROWSE** button, navigate to and select the file containing the barcode numbers
5. Click the **SUBMIT QUERY** button to load the file
6. If there are errors in the file, an alert will appear with a link to an error page. Print the error page

### ***Printing an Inventory Report***

1. Select **INVENTORY**
2. Go to Step Two on that page
3. Enter the individual Branch, Location or call number section for which you want an inventory report. Branch, Location and/or call number must be entered to run a report. If you don't use the Branch and Location fields in your records, leave them blank. To enter the call number range, enter only the beginning characters of the call numbers. For example, if you just scanned all the books in the 300s, simply enter 3. The program will create an inventory report for all missing items whose call numbers begin with 3
4. Click the **SUBMIT** button
5. The inventory report will include those items that are missing - meaning they have the status "IN" but they were not scanned during the inventory process
6. The Inventory Report is displayed in a separate window for easy printing

### **Resetting the Inventory**

After printing the inventory report, you can reset the inventory number file which clears the numbers that were entered. If you have a small library, under 10,000 titles, you may want to do a reset after the entire library has been inventoried. In order to keep the performance at an acceptable level, larger libraries may want to do a reset after each major section of the collection has been inventoried.

#### **To reset the inventory number file:**

1. Select **INVENTORY**
2. Select the **RESET INVENTORY** link in Step Three. The inventory number file will be reset

### ***Reports Module***

The Reports Module allows you to print catalog, patron, circulation, serials and system reports as well as overdue and fine notices and letters. Most of the available reports are self-explanatory.

# Appendix 1

## ***MARC Field Codes***

0XX	Identifiers.
1XX	Main Entry.
2XX	Titles and title paragraph (title, edition, imprint).
3XX	Physical description, etc.
4XX	Series statements.
5XX	Notes.
6XX	Subject Access fields.
7XX	Added entries other than subject or series; linking fields.
8XX	Series added entries, etc.
9XX	Microlif Pre 1987 Local Holdings
10	LCCN
20	ISBN
22	ISSN
28	Publisher Number
35	System Control Number
40	Cataloging Source
42	Authentication Code
43	Geographic Area Code
49	Local Holding
50	Library of Congress Call No
60	Nat. Library of Medicine Call No
52	Geographic Classification
82	DDCN
90	Local Call Number
92	Local Call Number
99	Local Call Number
100	Main Entry-Personal Name
110	Main Entry-Corporate Name
111	Main Entry-Meeting
130	Main Entry - Uniform Title
240	Uniform Title
245	Title Statement
246	Varying Form of Title
250	Edition Statement
255	Cartographic Mathematical Data
260	Publication Distribution Data

300	Physical Description
306	Playing Time
310	Current Frequency
321	Former Frequency
340	Physical Medium
351	Organization of Materials
362	Dates of Publication
500	General Note
504	Bibliography, Etc. Note
505	Formatted Notes
506	Restrictions On Access Note
508	Creation/Production Credits Note
511	Performer Note
513	Type of Report
516	Type of Computer File
518	Date/Time Place of Event
520	Summary Note
521	Target Audience
524	Preferred Citation Of Described Materials Note
526	Study Program Note
538	System Details Note
540	Terms Governing Use And Reproduction Note
541	Immediate Source Of Acquisition Note
546	Language Note
545	Biographical or Historical Data
550	Issuing Body Note
555	Cumulative Index/Finding Aids Note
561	Ownership And Custodial History
583	Action Note
586	Awards Note
590	Local Note
600	Subject-Personal Name
610	Subject Added Entry-Corporate Name
611	Subject Added Entry-Meeting Name
630	Subject Added Entry- Uniform Title
650	Subject-Topical Term
651	Subject-Geographic Name
655	Index Term-Genre/Form
690	Subject-Locally Defined
700	Added Entry-Personal Name
710	Added Entry-Corporate Name

711	Main Entry-Meeting
730	Added Entry-Uniform Title
740	Added Entry-Uncontrolled Related/Analytical Title
753	System-Access to Files
780	Preceding Entry
785	Succeeding Entry
800	Series Added Entry-Personal Name
810	Series Added Entry-Corporate Name
830	Series Added Entry-Uniform Title
856	Electronic Location and Access
900	Call Number
903	Price
906	Quantity

## Appendix 2

### *Acronyms*

MARC	<b>M</b> achine <b>R</b> eadable <b>C</b> ataloging The library standard for computerized cataloging data
ISBN	<b>I</b> nternational <b>S</b> tandard <b>B</b> ook <b>N</b> umber
ISSN	<b>I</b> nternational <b>S</b> tandard <b>S</b> erial <b>N</b> umber
DDCN	<b>D</b> ewey <b>D</b> ecimal <b>C</b> all <b>N</b> umber
LLCN	<b>L</b> ibrary of <b>C</b> ongress <b>C</b> all <b>N</b> umber

## Appendix 3

### ***AutomateME Participants***

Name	Library	Email
Dorthe Hillquist	Waterford	<a href="mailto:wla@waterford.lib.me.us">wla@waterford.lib.me.us</a>
Cheryl Baker	South China	<a href="mailto:cbaker@fairpoint.net">cbaker@fairpoint.net</a>
Deborah Lapp	Readfield	<a href="mailto:dlapp@readfield.lib.me.us">dlapp@readfield.lib.me.us</a>
Mary Waterhouse	Acton	<a href="mailto:marywaterhouse@acton.lib.me.us">marywaterhouse@acton.lib.me.us</a>
Judy Rogers	Weld	<a href="mailto:browngrannie@yahoo.com">browngrannie@yahoo.com</a>
Kara Kugelmeyer	Arthur Church Brown	<a href="mailto:kara.kugelmeyer@cengage.com">kara.kugelmeyer@cengage.com</a>
Mary Grow	Arthur Church Brown	<a href="mailto:mmgrow@yahoo.com">mmgrow@yahoo.com</a>
Dan Hester	Soldier's Memorial	<a href="mailto:danmore@juno.com">danmore@juno.com</a>
Erika Jordan	Kezar Falls	<a href="mailto:edesjardins@kezar-fall.lib.me.us">edesjardins@kezar-fall.lib.me.us</a>
Elaine Wilcox	Underwood Mem	<a href="mailto:ladyelaine@localnet.com">ladyelaine@localnet.com</a> Or <a href="mailto:faylib@fayette.lib.me.us">faylib@fayette.lib.me.us</a>
Pam Slattery-Thomas	Soldier's Memorial	<a href="mailto:pslattery65@yahoo.com">pslattery65@yahoo.com</a>
Sandra Bestwick	New Vineyard	<a href="mailto:home_edu@yahoo.com">home_edu@yahoo.com</a>
Alice Olson	Dr Shaw Memorial	<a href="mailto:aolson@fairpoint.net">aolson@fairpoint.net</a>
Cheryl McCleery	Strong Public	<a href="mailto:stronglibrary@yahoo.com">stronglibrary@yahoo.com</a>
Frederick Gralfnski	Pembroke Library	<a href="mailto:gralf1@wildblue.net">gralf1@wildblue.net</a>
Pamela Storm	Brooksville Free	<a href="mailto:josdad85@aol.com">josdad85@aol.com</a>
John McManus	Millinocket Memorial	<a href="mailto:jmcmman@millinocket.lib.me.us">jmcmman@millinocket.lib.me.us</a>
Cara Sawyer	Cherryfield Public	<a href="mailto:cherryfield@cherryfield.lib.me.us">cherryfield@cherryfield.lib.me.us</a>
Paula Angione	Dorcas	<a href="mailto:dorcas@dorcas.lib.me.us">dorcas@dorcas.lib.me.us</a>

## Appendix 4

### ***Other Maine Libraries Using Library World***

(as of April 2010)

Belgrade Public Library	Library World
Bowdoinham Public Library	Library World
Bridge Academy Public Library	Library World
Carrabassett Valley Library	Library World
Cushing Public Library	Library World
Isaac F. Usherhine Public Library	Library World
Levant Heritage Library	Library World
Mildred Stevens Williams Memorial Library	Library World
New Portland Community Library	Library World
Parsons Memorial Library	Library World
Phillips Public Library	Library World
Revere Memorial Library	Library World
South Thomaston Public Library	Library World
Warren Free Public Library	Library World
Palermo Community Library	Library World Gold
Waldoboro Public Library	Library World Gold

## **Appendix 5**

### ***Location Codes for Barcodes***

5300 Kezar Falls Circulating Library  
5301 Waterford Library Association  
5302 New Vineyard Public Library  
5303 S China Public Library  
5304 Albert Church Brown Memorial Library  
5305 Dr. Shaw Memorial Library  
5306 Readfield Community Library  
5307 Soldiers Memorial Library  
5308 Acton Public Library  
5309 Weld Public Library  
5310 Underwood Memorial Library  
5311 Brooksville Free Public Library  
5312 Strong Public Library  
5314 Millinocket Memorial Library

# Appendix 6

## Weeding Matrix

Dewey Class	Comment 1	Comment 2	Comment 3	Replacement
<b>000 GENERALITIES</b>				
Encyclopedias (Specialized Encyclopedias)	20% changed each year	Old edition may become circulating edition	Print and online are not the same-- especially illus	5 years Keep until a new edition
<b>100 - PHILOSOPHY</b> Philosophy Psychology Curiosities & Wonders Parapsychology & Occult	Consider applicability to curriculum	Keep/replace curiosities and wonders depending on use and curriculum	Most unscholarly dated after 10 years	On condition and applicability to curriculum Philosophy -10 Psych - 10 Psych texts -5
<b>200 - RELIGIONS</b>				
Religion	Dates slowly	Keep what is appropriate for clientele - esp. saint books	Should have basic information on many sects, etc.	Weed items which are clearly propaganda
<b>300 - SOCIAL SCIENCES</b>				
Almanacs & Yearbooks	Replace annually with new volume	May keep old ones for assignments - not on open shelves		No more than 5 years old
Politics & Economics	Look for old addresses and contact information	Look at historical use	Generally weed not current	5 - 10 years
Commerce & Career information	Are computers part of the career; does the career still exist?	Look at illustrations	Are women and men both represented in the career?	5 - 10 years
Sociology, communities, classes and races	Look at nomenclature	Look at diversity of lifestyles & issues.	What is "future"? "modern"?	5 - 10 years
Customs/Costume (may be 700)	Look for a diversity of cultures.	Look at holidays, costumes; are new ones represented?		Keep as long as condition permits
Etiquette/Manners	Mention of email?	Look for kid friendly versions	Dating customs	Weed older editions
Folklore	Keep standard works			Keep as long as condition permits
<b>400 - LANGUAGE</b>				
Dictionaries	Language changes	Computer words/ DVD/CDs		Weed every 10 years
<b>500 - PURE SCIENCE</b>				
	1/2 info changes every 5 years	Look for out-of date and unsafe science fair material	Keep bio dictionaries in case people not in newer editions	Generally 5 year maximum

♥ Pamela K. Kramer, 2002, rev. 2004

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### Weeding Matrix

Mathematics & computers	Ages slowly	Keep computer books current	Do kids have older machines at home? May need older instructions	Logic & math 10 years
Astronomy	Stargazing does not change	Planets, solar system changing rapidly		Weed after 3 years -- everything before 1995
Physics	Quarks	Weed with a pro		5 years
Weather & Climate	Should discuss use of computers in prediction	Hole in the ozone	Satellites for prediction?	5 years
Chemistry	Has correct number of elements			3 - 5 years
Geology	Field guides date slowly	Weed if use term "continental drift" and not "plate tectonics" or if earth is not 4.6 billion years		3 - 5 years
Dinosaurs	Mention feathered, warm blooded, meteor extinction	Mention discoveries since 1980?	Look at illus -- not all reptilian sauropods	5 - 10 years
Zoology	Should list 5 kingdoms	Endangered species		All prior to 1986
Microbiology	Newest findings on viruses	Bacteria living in extreme conditions		5 years
<b>600 - APPLIED SCIENCES</b>				
Medicine	AMA recommends keeping only 3 years	Diets, nutrition, calorie count	Look at pharmaceutical drugs and illegal drugs	All too old at 10 years. Most at 5. Check the association, i.e. diabetes, heart, etc. if in doubt
Agriculture/Plant culture	Look at pesticides	Farm equipment illus		5 years
Technology	Look for use of computers	How are TV, radio shown?		No more than 5 years

♥ Pamela K. Kramer, 2002, rev. 2004

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**Weeding Matrix**

Cars, Trucks, Motorcycles	Historical value only	Modern cars?	Are they the cars kids are buying?	5 - 10 years
Manufacturing	Are guys stoking furnaces?	Use of computers & robotics	Global and trade	5 - 10 years
Electronic communications	More than a hint at PC's	Use of computers in many fields	Cell phones, MP3, picture phones	5 years
Space Exploration	Must cover Mars and Venus missions	Space station?		3 - 5 years
Cookbooks	Mention microwave?	Check food handling and safety information	See "medicine" for special diet information	3 - 5 years
<b>700 - THE ARTS</b>				
Photography	Look for newer techniques	Digital cameras/ computers		Weed based on condition and use - no more that 5 years
Sports and Games	Out-of-date bios	Look at age of rulebooks, coaching, and equipment	Replace as interests change	Condition, use and accuracy 5 - 10 years
Music	Out-of-date bios of pop figures	Songbooks are hard to replace	Keep basic titles	3 - 5 years (pop music)
Art	Basic histories do not date	Look at illustrations		Weed b/w illustrations
Architecture	Keep as fits curriculum			Keep local
Sculpture/Painting Drawing	Look at techniques			Keep if well illustrated
Decorative Arts	Price guides date	Interior decoration dates in 5 years	Consider curricular use	5 years or as condition and use.

♥ Pamela K. Kramer, 2002, rev. 2004

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**Weeding Matrix**

<b>800 - LITERATURE</b>				
Companions	Finite size means some info dropped in newer editions			Become dated in 10 - 15 years Keep if deleted content still needed
Anthologies/Criticism	Are authors in curriculum			Keep based on use
Plays/ Motion pictures	In curriculum  Older bios	Popularity has waned		Keep based on use  Keep works by local authors
<b>900 - HISTORY</b>				
General and Old World	Look for accuracy of facts and dated viewpoint (ala white man's burden)	Look at photos and illus for bias	Is this a primary source	What is the latest date covered in textbook?
Country books	Check names	Look for "euro"	Look at Berlin Wall, Soviet Union	5 - 10 years
Travel guides	Prices/modes of transportation			3 - 10 years
U.S. History	Look for accuracy of facts and dated viewpoint (ala colored, Negro, Black, Afro-American)	Look at photos and illus for bias	Who is the last president listed? (Clinton?) Be careful "all"	5 - 10 years
State seals, flags, etc	Color illus?			Keep based on condition
Geography	Watch for country name changes	Look at how local customs are portrayed		3 - 5 years
Atlases	Keep one or two for historical purposes	Prefer an historical atlas		3 - 5 years
<b>Biography</b>	Keep if the subject is of permanent interest	Consider link to curriculum and to demographic	Update famous people with new thinking about them	Condition, use, and reliability
<b>Fiction, Picture Books and Story Collections</b>	Old fashioned dated titles or illustrations or if not circulated	Replace classics and heavily used titles	Use circ statistics to justify use/non-use. Market those worth keeping	5 - 10 years

♥ Pamela K. Kramer, 2002, rev. 2004

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## **Appendix 7**

### ***Manual Circulation Form***

(for use during power outages)

Photocopy next page as many times as needed (before a power outage occurs). While the power is out, write down the patron's name and barcode number on the manual circulation sheet. Then, write down the barcodes for every item the patron checks out during the power outage. When the power returns, input the information into LibraryWorld's circulation module.

