

Sagebrush InfoCentre

Getting Started Guide



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About this manual

This manual will help you get started with InfoCentre. It provides information about installation and setup as well as instructions for performing common tasks.

- **Chapter 1** provides information about installation and setup. This chapter is most likely to be of interest to the technician installing InfoCentre, and to the librarian responsible for setting up and administering InfoCentre once it has been installed.
- **Chapters 2-5** provide basic information about some of InfoCentre's most frequently used features. These chapters are of interest primarily to the librarians who will be using InfoCentre for day-to-day tasks such as circulation, cataloging, reporting, and so on. Please note that these chapters provide an overview only. For more detailed information about these and other InfoCentre features, consult the Help. For help using Help, see *Using Help* on page 30.
- **Chapter 6** explains how patrons access and use InfoCentre's Web-based search stations. This chapter is of interest to patrons and anyone in your library who will be helping patrons use InfoCentre.


Up and running checklist


Here is a list of installation and setup tasks.

Task	Required	Reference
Install InfoCentre Server	Yes	<i>Installing InfoCentre Server</i> on page 5.
Install one or more InfoCentre clients	Yes	<i>Installing InfoCentre clients</i> on page 18.
Specify server address and port	Yes	<i>Logging in</i> on page 20.
Assigning library names and IDs	Yes	<i>Setting up libraries</i> on page 22.
Set up InfoCentre	Yes	<i>Setting up InfoCentre</i> on page 24.
Add or import patrons	Yes	Refer to the following Help topics: <ul style="list-style-type: none">• <i>How to import patrons immediately.</i>• <i>How to add a patron.</i>
Add or import titles and copies	Yes	Refer to the following Help topics: <ul style="list-style-type: none">• <i>How to import MARC records.</i>• <i>How to add a title.</i>• <i>How to add a copy.</i>

Installing InfoCentre

Before using InfoCentre, you must install the InfoCentre Server and one or more InfoCentre clients (workstations).

 InfoCentre's patron module is Web-based and runs from a standard Web browser. This means that you do not need to install any InfoCentre software on the computers that your patrons use. As long as the computer has an industry-standard Web browser that meets our minimum requirements, you can use it as a search station. For more information, see *Making InfoCentre available to patrons* on page 86.

 If you are converting to InfoCentre from an Athena or Spectrum library automation system, please refer to the *InfoCentre Conversion Instructions* document. It provides complete installation information as well as instructions for converting your existing data to InfoCentre.

What does the server installation do?

The install varies slightly depending on your network operating system.

Windows

The installation program:

- Installs the InfoCentre Server system files.
- Installs Microsoft SQL Server 2000 Desktop Edition (MSDE), registers it, and starts it as a service.
- Installs Apache Tomcat, registers it, and starts it as a service.
- Asks you to reboot your computer.

Novell NetWare and Mac OS X

The installation process:

- Installs the InfoCentre Server system files.
- Uses MySQL server included with both Novell NetWare and Mac OS X.
- Uses Apache Tomcat included with both Novell Netware and Mac OS X.
- Requires that you reboot your computer.

General notes

- InfoCentre uses port 9101 for communication between the InfoCentre Server and InfoCentre clients.
- InfoCentre uses port 80 for communication between the InfoCentre Server and InfoCentre's Web-based patron search station. (If your computer is running a Web server that uses this port, please call Technical Support.)
- InfoCentre does not use Microsoft Internet Information Server (IIS).



Depending on your situation, alternative installations may be possible. If you want to use a different SQL server or different ports, please call Technical Support.

Installing InfoCentre Server


The installation varies slightly depending on whether you are installing on a Windows, Mac OS X, or Novell NetWare server.

- For Windows, see page 6.
- For Novell NetWare, see page 8.
- For Mac OS X, see page 15.

Windows

To install InfoCentre Server

- 1 Run the program **InfoCentreServerInstaller.exe**. (You may have downloaded this program file from Sagebrush Corporation or you may have received it on an InfoCentre CD.)
- 2 After the program starts, follow the instructions that appear on your screen.

 During installation, you are given the opportunity to view and change advanced settings. Do this if your library has Microsoft SQL Server and you want InfoCentre to use it instead of MSDE, or if you want to use a port other than 9101 for client/server communications. For a description of the advanced settings, see the appendix *Advanced Installation Settings (Windows)* on page 101.

The MSDE installation automatically adds shortcuts for MSDE Service Manager to both the system tray and the Start menu. InfoCentre does not require either of these shortcuts, so if you wish to remove them, you can. You can also remove the file *msde_setup.log* from the root folder of the install drive.

SQL Memory

If your InfoCentre system will include multiple libraries, you must now adjust the SQL memory.

To adjust SQL memory

- 1 Open a command prompt window. Then type `osql -U sa -P sagepw -S 127.0.0.1\Sagebrush` and press **Enter**.
- 2 Type `sp_configure 'Show Advanced Options',1` and press **Enter**.
- 3 Type `go` and press **Enter**.
- 4 Type `reconfigure` and press **Enter**.

- 5 Type *go* and press **Enter**.
- 6 Type *sp_configure 'max server memory',[memvalue]* where [memvalue] is the number shown in the table below. Then press **Enter**.
- 7 Type *go* and press **Enter**.
- 8 Type *reconfigure* and press **Enter**.
- 9 Type *go* and press **Enter**.
- 10 Type *quit* and press **Enter**. Then close the command prompt window.

Number of libraries	[memvalue]
2-5	1024
6-20	2048
21-50	3072
51 or more	Please call Technical Support.

What's next?

After installing the InfoCentre Server, you can install your InfoCentre clients. For instructions, see *Installing InfoCentre clients* on page 18.

Novell NetWare

InfoCentre Server must be installed from a Windows workstation.



You must be using Novell NetWare 6.5 sp5 or later with MySQL, Apache, and Tomcat 4 installed. For instructions installing these services, consult the documentation that came with your version of Novell NetWare.

Before installing InfoCentre Server on Novell

Before installation, you must verify that:

- Your server computer is running the Server version of the Java Virtual Machine (JVM). If it is not running this version, you must change versions before installing InfoCentre Server.
- MySQL is using INNODB.

To verify that you are running the Server version of the JVM

- 1 From the System Console, type `java -version` and press **Enter**.
- 2 Switch to the Logger screen. It should show one of the following lines:
 - *Java HotSpot TM Server VM*
If the above line is present, your server is running the correct JVM. You do not need to change versions.
 - *Java HotSpot TM Client VM*
If the above line is present, your server is not running the correct JVM, and you must change versions. (See below for instructions.)

To change to the Server version of the JVM

- 1 Open the file **SYS:\etc\java.cfg** file in a text editor and add the line
JAVA_COMPILER=server
- 2 Save the file and then reboot your computer.

To verify that MySQL is using INNODB

- 1 Open the file **SYS:\etc\my.cnf** in a text editor.
- 2 If the file contains the line
skip-innodb
Comment it out (by adding the # character to the beginning of the line).
- 3 Save the file and restart MySQL.

Installing InfoCentre Server on Novell

After verifying that your computer is using the Server version of the JVM and that MySQL is using INNODB, you can install InfoCentre Server.

Step 1: adjust Novell and other memory settings (multi-library installations only)

If your InfoCentre system will include multiple libraries, you should now adjust various memory settings to insure that Tomcat can allocate sufficient memory to InfoCentre Server.

- Ensure that there is enough memory available for Tomcat by adjusting various Novell system settings as appropriate.
- Adjust the SERVER setting in the autoexec.bat file. For instructions, see below.
- Adjust the Xmx setting in the tomcat4.ncf file. For instructions, see below.
- After making the above changes, verify that Tomcat starts correctly.

To adjust the SERVER setting

- 1 Open the file **c:\autoexec.bat** in a text editor.
- 2 Locate the line containing the SERVER setting. (The line will include the word *SERVER* and may or may not be followed by a *-U* option, for example, *SERVER -U1536000000*.)
- 3 If your computer has less than 4 GB of memory, change the line to read: **SERVER -U1024000000**
--or--
If your computer has 4 GB or more of memory, change the line to read: **SERVER -U1536000000**
- 4 Save the file.

To adjust the Xmx setting

- 1 Open the file **SYS:/Tomcat/4/bin/tomcat4.ncf** in a text editor.
- 2 Locate the line containing the Xmx setting. (Although the number may vary, the text will look something like: *-Xmx256m*.)
- 3 If your computer has less than 4 GB of memory, change the setting to **-Xmx896m**
--or--
If your computer has 4 GB or more of memory, change the setting to **-Xmx1408m**
- 4 Save the file.

If you altered the Server setting, use this method to verify that Tomcat starts correctly

- 1 Restart your computer by typing *RESET SERVER* at the Novell console. (DO NOT use the Restart Server command.)
- 2 Use the Logger screen to confirm that Tomcat starts correctly. If you encounter problems, try readjusting the Novell System settings to provide Tomcat with more memory.

If you altered only the Xmx setting, use this method to verify that Tomcat starts correctly

- 1 Stop the Tomcat service by typing *TC4STOP* from the Novell Console.
- 2 Restart the Tomcat service by typing *TOMCAT4* from the Novell Console.
- 3 Use the Logger screen to confirm that Tomcat starts correctly. If you encounter problems, try readjusting the Novell System settings to provide Tomcat with more memory.

Step 2: Stop the Tomcat and Apache services

- 1 Stop the Tomcat service by typing *TC4STOP* from the Novell Console.
- 2 Stop the Apache service by typing *AP2WEBDN* from the Novell Console.

Step 3: Access the InfoCentreNovellInstall folder

During the installation, you will copy specific files and subfolders from the InfoCentreNovellInstall folder to the SYS volume on your Novell NetWare server. The method you use to access this folder varies depending on whether you are installing from a downloaded package or from a CD.

- If you downloaded the install package from Sagebrush Corporation, decompress the file **InfoCentreNovellInstall.zip** to the hard drive of the Windows machine that you will use to perform the install. This creates a folder called InfoCentreNovellInstall on that computer.
--or--
- If you are installing from a CD, the InfoCentreNovellInstall folder is on the InfoCentre CD.

Step 4: Copy files to your NetWare server

- 1 From a Windows machine, log on to the Novell server using a mapped drive letter. (Make sure that you log on with an Administrator account.)
- 2 Copy the folder **InfoCentreServer** from InfoCentreNovellInstall\ to the root directory of the SYS volume on your Novell NetWare server.
- 3 Copy the folder **InfoCentre** from InfoCentreNovellInstall\Webapps\ to the \Tomcat4\Webapps folder on the SYS volume of your Novell NetWare server.
- 4 Copy the folder **Defaults** from InfoCentreNovellInstall\ to the \InfoCentreServer\ folder on the SYS volume of your Novell NetWare server.
- 5 Copy the file **infocentre-apache.conf** from InfoCentreNovellInstall\Webapps\ to the \Tomcat4\conf folder on the SYS volume of your Novell NetWare server.

Step 5: Edit the CreateInfoUser.ncf file

If you are using a standard configuration, your MySQL's root user requires a password. Open the file **sys:\InfoCentreServer\dbcreator\CreateInfoUser.ncf** in a text editor and replace the text *noPasswordUsed* with your MySQL root password. Then save the edited file. (*Note:* If your MySQL's root user does not require a password, you do not need to edit the CreateInfoUser.ncf file.)

Step 6: Edit the httpd.conf file

- 1 Open the file **sys:\apache2\conf\httpd.conf** in a text editor.
- 2 Add a new line to the bottom of the file containing the text
include sys:/tomcat/4/conf/infocentre-apache.conf
- 3 Add a blank line immediately after the text you just entered.
- 4 Save the edited file.

Step 7: Run the scripts

- 1 From the Novell Console, type *sys:/InfoCentreServer/dbcreator/CreateInfoUser.ncf* and press **Enter**.
- 2 Use the Logger screen to confirm that the process has finished running. *Note:* It is normal to see debug and error messages on the Logger screen. For more information, see *Common CreateInfoUser.ncf error messages* at the end of these instructions.
- 3 From the Novell Console, type *sys:/InfoCentreServer/dbcreator/CreateInfoDb.ncf* and press **Enter**.
- 4 Use the Logger screen to confirm that the process has finished running. *Note:* It is normal to see debug messages on the Logger screen.

Common CreateInfoUser.ncf Error messages:

When running CreateInfoUser.ncf, you will see some DEBUG messages. They do not indicate a problem and can be ignored.

Similarly, you may see the following error messages. Again, they do not indicate a problem and can be ignored.

- ERROR [main] dbcreator.DbBAdminSetup – Running DbAdminSetup
- ERROR [main] dbcreator.DbAdminSetup – {serverName=InfoCentre, adminPass=password, serverPort=3306, rootDir=SYS:/InfoCentreServer/dbcreator, serverAddress=127.0.0.1, userID=Sagebrush, serverPublishedName=gemini, adminID=root, serverPublishedPort=9101, databaseDriver=com.mysql.jdbc.Driver, userPassword=sagepw}
- ERROR[main] dbcreator.DbAdminSetup – Root dir is SYS:/InfoCentreServer/dbcreator
- ERROR [main] dbcreator.DbAdminSetup – Connection URL :jdbc:mysql://127.0.0.1:3306/mysql?useUnicode=true&characterEncoding=latin1
- ERROR [main] dbcreator.DbAdminSetup – CREATE DATABASE InfoCentre

Step 8: Copy the serverConfig.xml file

Copy the file **serverConfig.xml** from `sys:\InfoCentreServer\dbcreator\` to the folder `sys:\InfoCentreServer\data\InfoCentre\`

Step 9: Restart the Tomcat and Apache services

- 1 Start the Tomcat service by typing *TOMCAT4* from the Novell Console.
- 2 Start the Apache service by typing *AP2WEBUP* from the Novell Console.

What's next?

After installing the server, you can install your InfoCentre clients. For instructions, see *Installing InfoCentre clients* on page 18.

Mac OS X



If MySQL is not running on the Mac OS X server, start it before proceeding with the installation.

To start MySQL

- 1 Log on using an Administrator account.
- 2 Using the Finder, open the Applications folder and then the Server folder.
- 3 Launch MySQL Manager and unlock it. (If asked to log on, log on as root.) *Note:* If there is a **Stop MySQL** button, MySQL is already running. If so, you can skip steps 4-6.
- 4 If the **Stop MySQL** button is not present, click **Install Default Files**.
- 5 If you are using Mac OS 10.4 or later, select the **Allow Network Connections** option.
- 6 Start the MySQL service.
- 7 Lock the settings.
- 8 Close MySQL Manager.

To install InfoCentre Server

- 1 Log on as root. (From the Apple menu, choose **Log Out**. Then at the login window, enter *root* for the login name and provide the root password.)
- 2 If you downloaded the installation package from Sagebrush Corporation, double-click the file **InfoCentreServerInstall.dmg**. A folder opens containing the program **InfoCentre Server Installer**. Start this program. Then follow the instructions on your screen.

--or--

If you are installing from CD, the InfoCentre CD contains the program **InfoCentre Server Installer**. Start this program. Then follow the instructions on your screen.



During installation, you are given the opportunity to view and change advanced settings. Do this if you have changed the administration ID or password for the MySQL server. You can also use advanced settings to specify a database server or port other than the defaults (127.0.0.1 and 3306) or to specify a port other than 9101 for client/server communication.

For a description of the advanced settings, see *Advanced Installation Settings (Mac OS X)* on page 103.

After installing InfoCentre Server (Mac OS X)

After installing InfoCentre Server, you need to:

- Edit the `setenv.sh` file to ensure that Tomcat is allocated sufficient memory (multi-library installations only).
- Configure the Web and Application Server services to work with InfoCentre.
- Restart the Web and Application Server services.

To edit the `setenv.sh` file

Perform the following steps only if your InfoCentre system will include multiple libraries.

- 1 Open the file `/Library/Tomcat/bin/setenv.sh` in a text editor.
- 2 Search for the line specifying the `Xms` and `Xmx` values. Although the numbers may vary, the line will look something like:

```
export JAVA_OPTS="-Xms128m -Xmx256m"
```
- 3 Change the line to:

```
export JAVA_OPTS="-Xms128m -Xmx1408m"
```
- 4 Save the file.

To configure the Web and Application Server services

- 1 On the Mac OS X computer, start Server Admin by clicking its icon from the Dock. The Server Admin window opens.
- 2 In the left panel, if the services are not shown, click the arrow. The panel expands to show the services.
- 3 In the list of services (left panel), click **Web**. Information for this service is shown in the panel at the right of the window.
- 4 Click **Settings** and then **Modules**.
- 5 In the right panel, if the **jk_module** is not already selected, select it now.
- 6 If the Web service is running, stop it by clicking the **Stop Service** button at the top of the window.
- 7 In the list of services (left panel), click **Application Server**. Information for this service is shown in the panel at the right of the window.
- 8 Click **Settings**.
- 9 Select the **Tomcat only** option.
- 10 If the Application Server service is running, stop it by clicking the **Stop Service** button at the top of the window.

To restart the Application Server and Web services

- 1 In the list of services (left panel), click **Application Server**.
- 2 Click **Start Service**.
- 3 In the list of services (left panel), click **Web**. Information for this service is shown in the panel at the right of the window.
- 4 Click **Start Service**.



Once you have completed the above steps, log out of root.



Due to a problem with Mac OS X 10.4, restarting the Application Server does not launch Tomcat. Until this problem is resolved, 10.4 users must restart Tomcat manually. To do this login as root. Then, from a terminal window, type `/Library/Tomcat/bin/startup.sh` and press **Return**. Then logout of root. (Similarly, if you need to shut down Tomcat on Mac OS X 10.4, you must login as root. Then from a terminal window type `/Library/Tomcat/bin/shutdown.sh` and press **Return**.)

What's next?

After installing the server, you can install your InfoCentre clients. For instructions, see *Installing InfoCentre clients* on page 18.

Installing InfoCentre clients

You use InfoCentre clients for circulation, cataloging, inventory, reporting, and administration tasks. You should install the InfoCentre client on each computer that will be used for any of these tasks.

For a single-site library, install InfoCentre clients on one or more workstations in that library.

If your district has multiple libraries, install InfoCentre clients on one or more workstations at each library.

If you will be installing multiple libraries on one server, the first InfoCentre client installed will be used by the System Administrator to set up additional libraries. For more information, see *Multiple library setup* on page 23.



Before installing additional InfoCentre clients, we recommend that you start the first InfoCentre client and change the password for the default Admin login. Note that the additional libraries will not be able to log in until you configure them. For instructions, see *Setting up libraries* on page 22.

To install an InfoCentre client (Windows)

- 1 Run the program **InfoCentreClientInstaller.exe** (You may have downloaded this program file from Sagebrush Corporation or you may have received it on an InfoCentre CD.)
- 2 After the program starts, follow the instructions that appear on your screen.

To install an InfoCentre client (Macintosh)

- 1 If you downloaded the installation package from Sagebrush Corporation, double-click the file **InfoCentreClientInstall.dmg**. A folder opens containing the program **InfoCentre Client Installer**. Start this program.
--or--
If you are installing from CD, the InfoCentre CD contains the program **InfoCentre Client Installer**. Start this program.
- 2 After the program starts, follow the instructions that appear on your screen.

Logging in

The first time the InfoCentre client is launched on a given machine, you must specify the location of the InfoCentre Server. After that, you can log in simply by providing your login name and password.

To log in the first time after installation

- 1 Double-click the **InfoCentre client** icon on your computer's desktop. The Login screen appears.
- 2 In the **Server Address** box, enter the IP address of the InfoCentre Server. (If you do not know this, contact the technician who installed InfoCentre Server.)
- 3 In the **Server Port** box, enter the port number that the program should use to connect to InfoCentre Server. (By default this is 9101.)
- 4 In the **Login Name** box, enter the default login name for the library you want to access.
 - If there is only one library, or if there are multiple libraries but you are logging into the library automatically created during the install, the default login name is ADMIN.
--or--
 - If you have multiple libraries and this is one of the libraries you added yourself, enter the default login name assigned by the program when you added the library.
- 5 Leave the **Password** box empty.
- 6 Click **Login**.

For all future logins, InfoCentre remembers the Server Address and Server Port information. You do not need to enter it again.



After logging in with the default login name for the first time, you should create a password for the Admin login and add other logins as needed. For more information, see the Help topic *About logins*.



When setting up Login Feature Access at each library, we recommend that you remove access to Library Settings for all users since this feature will not be used except by the System Administrator.

To log in (all subsequent logins)

- 1 Double-click the **InfoCentre client** icon on your computer's desktop. The Login screen appears.
- 2 In the **Login Name** box, enter your InfoCentre Login Name.
- 3 In the **Password** box, enter your password.
- 4 Click **Login**.



To view or change Server Address or Server Port information, click **Advanced** from the Login screen.



When there is an update to InfoCentre, your InfoCentre administrator places the update files on the server. Whenever you log in, the program automatically checks the server for updates. If it finds any, it installs the update files and then redisplay the Login screen so that you can log in using the new version of the program.

Setting up libraries

Single library setup

The server installation process automatically adds a single default library to InfoCentre. You need to give this default library a descriptive name and a unique ID. The library name you specify will appear on reports and in the title bar of the InfoCentre window. The library ID will be incorporated as part of the URL used to access patron search stations (see *Making InfoCentre available to patrons* on page 86).

To assign a library name and ID

- 1 Start the InfoCentre client. A screen appears so that you can provide information about the InfoCentre Server.
- 2 The first time you start the InfoCentre client, the default **Login Name** will be Admin.
- 3 In the **Server Address** box, enter the IP address of the InfoCentre Server. (If you do not know this, contact the technician who installed InfoCentre Server.)
- 4 In the **Server Port** box, enter the port number that the program should use to connect to InfoCentre Server. (By default this is 9101.)
- 5 Click **Login**.
- 6 From the Admin tab, click **Station** and choose **Library Settings**.
- 7 In the Libraries list in the lower portion of the screen, click the existing library. InfoCentre displays the information for the library in the edit area near the top of the screen.

- 8 Enter the desired Library Name and ID in the fields provided. (For more information about these fields and all other elements on the screen, click the ? button (Help button).
- 9 Click **Save**.

Multiple library setup

If your InfoCentre system will include more than one library on the same server, you should edit the first library as described above under *Single library Setup*. Then, add the remaining libraries to InfoCentre and assign them names and IDs.



If your district assigns a unique ID to each school, use this for the library ID. Otherwise, use an abbreviated version of the library's name.

To add more libraries:

- 1 From the Library Settings screen, click **New**. Then enter the Library Name and ID for the new library in the fields at the top of the screen. For more information about these fields and all other elements on the screen, click the ? button (Help button).
- 2 Click **Save**. The program displays a message stating that the library has been added and shows the default login name for the new library. **Do not close this window yet.**
- 3 Write down the default login. You will need it later when you log in to this InfoCentre library.
- 4 Repeat steps 1 – 3 for the remaining libraries.
- 5 Click **Close**.

Distribute login information to libraries

After setting up each of the libraries, ensure that there is at least one InfoCentre client installed at each library. You must also provide the main user at each library with the server address, server port, and login name.

Setting up InfoCentre

InfoCentre's Administration menu provides access to numerous settings and options that you can use to control how InfoCentre performs various tasks. The default settings have been chosen to meet the needs of most libraries, so you may not need to change anything. However, you should definitely explore the various administration options to ensure that InfoCentre performs the way you want it to.

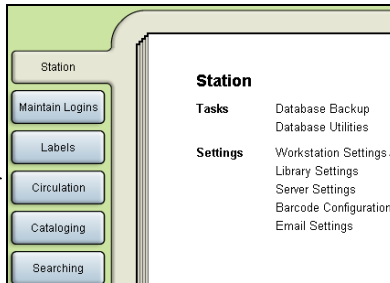
In particular:

- Before importing patrons or MARC records, check that the default copy and patron types meet your needs. For instructions see *Patron and copy types* on page 25.
- If your barcodes include leading zeros, you should configure InfoCentre to remove them from scanned barcodes. For more information, see the Help topics *About barcode setup*, *How to add a barcode configuration*, and *About the Barcode Configuration tab*.
- If you plan to email notices and reports, provide InfoCentre with information about your SMTP server. For more information, see the Help topics *About the Email Settings screen* and *How to specify email settings*.

To access the Administration menu

Click the **Admin** tab. InfoCentre displays the Administration menu.

Use these buttons to choose the general area of the program to set up. InfoCentre displays the related tasks on the right of the screen.



Choose the setup task from this list.



The buttons remain on the screen even after you have selected a task. To redisplay a menu, simply click the relevant button.

To choose administration tasks and settings from the menu

- 1 On the left side of the Administration menu, click the button corresponding to the area of the program you are interested in. InfoCentre displays a list of related tasks and settings on the right of the screen.
- 2 On the right side of the screen, select the task or setting by clicking it. InfoCentre displays a screen for performing the task or adjusting the settings. For help about any of the elements on the screen, click ? (Help button).

Patron and copy types

Among other things, InfoCentre uses patron and copy types to determine loan periods and checkout limits. Before importing patrons or title and copy data, make sure that the default copy and patron types meet your library's needs. For more information about patron types, see the Help topic *About Patron Types*. For more information about Copy types, see the Help topic *About Copy Types*.




For help using Help, see *Using Help* on page 30.

To view patron types

- 1 From the Admin tab, click **Circulation**.
- 2 From the list at the right of the screen, click **Patron Types**. The Patron Types screen appears. For detailed information about the screen, click ? (Help button).

To view copy types

- 1 From the Admin tab, click **Cataloging**.
- 2 From the task list at the right of the screen, click **Copy Types**. The Copy Types screen appears. For detailed information about the screen, click ? (Help button).

 After installation, start the InfoCentre client and log in to InfoCentre Server. Not only does this test the installation, it also provides the InfoCentre client with the server address and server port to be used for future logins. For more information, see *Logging in* on page 20.

Stopping and starting InfoCentre Server

The method you use to stop the InfoCentre Server program depends on your network operating system.

Windows

To stop InfoCentre Server on Windows

Stop the Apache Tomcat service.

To re-start InfoCentre Server on Windows

Start the Apache Tomcat service.

Mac OS X

To stop InfoCentre Server on Mac OS X

- 1 Log on as root. (From the Apple menu, choose **Log Out**. Then at the login window, enter *root* for the login name and provide the root password.)
- 2 Stop the Application Server service.
- 3 Stop the Web service.

To re-start InfoCentre Server on Mac OS X

- 1 Log on as root. (From the Apple menu, choose **Log Out**. Then at the login window, enter *root* for the login name and provide the root password.)
- 2 Start the Application Server service.
- 3 Start the Web service.



Due to a problem with Mac OS X 10.4, stopping or starting the Application Server does not stop or start Tomcat. Until this problem is resolved, 10.4 users must stop and restart Tomcat manually. To stop Tomcat, login as root. Then, from a terminal window, type `/Library/Tomcat/bin/shutdown.sh` and press **Return**. Similarly to restart Tomcat, login as root. Then from a terminal window type `/Library/Tomcat/bin/startup.sh` and press **Return**.

Novell NetWare

To stop InfoCentre Server on Novell

- 1 Stop the Tomcat service by typing `TC4STOP` from the Novell Console.
- 2 Stop the Apache service by typing `AP2WEBBDN` from the Novell Console.

To re-start InfoCentre Server on Novell

- 1 Start the Tomcat service by typing *TOMCAT4* from the Novell Console.
- 2 Start the Apache service by typing *AP2WEBUP* from the Novell Console.

Updating InfoCentre

After your initial installation, you do not need to update InfoCentre stations individually. When there is an update to InfoCentre, your InfoCentre administrator places the update files on the server. Whenever you log in, the program automatically checks the server for updates. If it finds any, it installs the update files and then redisplay the Login screen so that you can log in using the new version of the program.

2

Basics

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Using Help

The program's Help provides you with the instructions and background information you need to perform any task.

To access Help

From any InfoCentre screen, click the ? button.

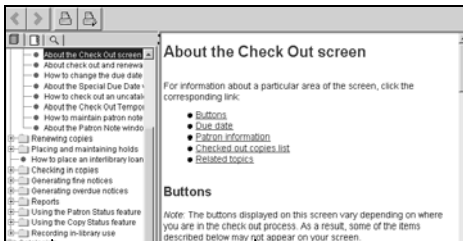


? button

Typical screen

The ? button is at the top right corner of most screens and windows.

When you click the ? button, InfoCentre automatically opens the Help window and displays the topic describing the screen you are currently using.



Navigation
pane

Topic pane

Help window

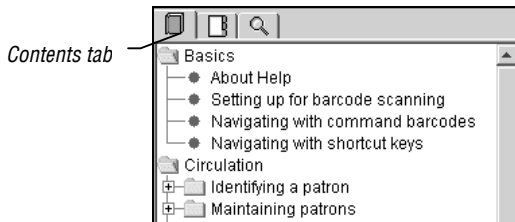
The Help window contains a Navigation pane and a Topic pane. Use the Navigation pane to locate topics via the Contents, Index and Search features. Use the Topic pane to view Help topics.

Using the Help Contents

The Help Contents is similar to the Table of Contents in a book.

To view the Help Contents

From the Help window, click the **Contents** tab.



Contents

You can use the Contents to navigate to a Help topic.

The Contents uses folders to organize related topics into logical groups.

To open or close a folder

Double-click the folder.

To display a Help topic

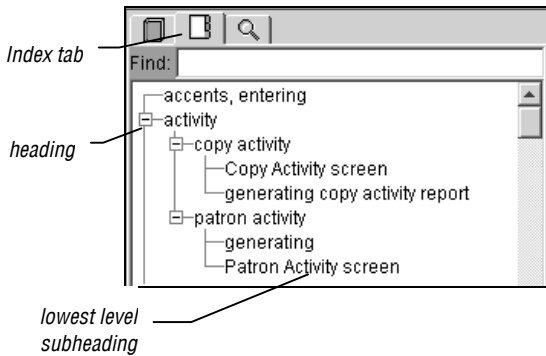
Click the topic.

Using the Index

The Index is similar to the index in a book.

To view the Index

From the Help window, click the **Index** tab.



Index

You can use the Index to navigate to a Help topic.

Headings are arranged alphabetically. The lowest level subheadings in each tree are linked to Help topics.

To search for an Index entry

Enter a search term in the **Find** box and press **Enter**. The first matching heading in the Index is selected.

To open or close an Index heading or subheading

Double-click the heading.

To display the Help topic associated with a heading or subheading

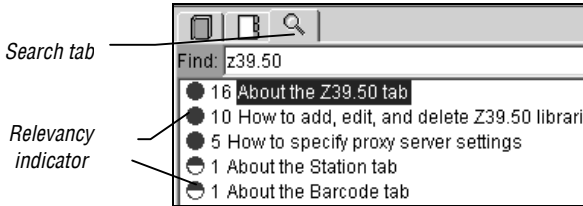
Click the heading associated with the Help topic. (Only the lowest level headings in each branch are linked to Help topics.)

Using the Search feature

The Search feature enables you to find all Help topics containing a specific word or phrase.

To access the Search feature

From the Help window, click the **Search** tab.



Search

You can use the Search feature to find a Help topic.

To search for a word or phrase

- 1 Access the Search feature.
- 2 Type your search term in the **Find** box and press **Enter**. All topics containing your search term are listed below the **Find** box.
- 3 To view a topic, click it.



The relevancy indicator can help you determine which topics are most useful. The larger the solid portion of the indicator, the more relevant the topic.

Using the Forward and Back buttons



Use these buttons to move back and forward through the topics you have viewed since opening Help.

Printing an InfoCentre screen

You can easily print the active area of any InfoCentre screen.



The active area is the central portion of the screen; it contains fields and information, rather than tabs and navigational buttons.

To print an InfoCentre screen

- 1 From the InfoCentre screen that you want to print, click the **Print** button.



Print button

Typical screen

The **Print** button is located near the top right corner of most InfoCentre screens.

InfoCentre automatically opens the Print window.

- 2 Specify the desired print options.
- 3 Click **OK**.

Using the calendar

Entering dates in InfoCentre is easy. You simply choose them from a calendar.

To display the calendar

Click the date field. InfoCentre displays the calendar.

April 2006						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6
Today: Mar 18, 2006						

Calendar

The calendar makes it easy to enter dates.

To change the year

- 1 InfoCentre displays the month and year at the top of the calendar. Click the year.



Click the year.

- 2 Notice that the calendar now contains up and down arrows to the right of the year. Use these arrows to select the desired year.



Click these arrows to move to the desired year.

To change the month

- 1 InfoCentre displays the month and year at the top of the calendar. Click the month.



Click the month.

- 2 Notice that the calendar now contains a list of months. Choose the desired month from this list.



You can use the arrows at the top of the calendar to display the next and previous months (without having to display the list of months).



Click these arrows to display next and previous months.

To select a date

- 1 Navigate to the desired month and year.
- 2 Click the day of the month that you want to select.



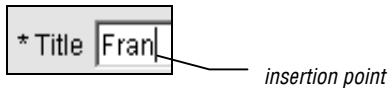
Today's date is shown as text at the bottom left corner of the calendar. You can click this text to more quickly select today's date. Also, depending on the situation, the calendar might include the word **None** at the bottom right corner. You can click this word, to empty the date box.

Entering diacritics

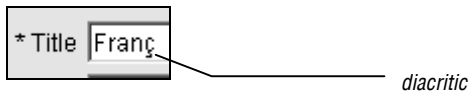
You can quickly enter diacritics (accents such as á, â, ç, and so on) and other non-English characters into most InfoCentre text fields.

To enter diacritics

- 1 Using your mouse, position the insertion point where you want the diacritic.



- 2 If you are using a Windows machine, hold down the **Ctrl** key and press **D** (on Macintosh machines use **Command+D**). The Diacritic window appears.
- 3 Click the character that you want to insert.
- 4 Click **Insert**. InfoCentre adds the character.



You can also display the Diacritic window by clicking the **àéïöù** button from the Title Information screen. In addition, if you are using Windows, you can enter diacritics by holding down the **Alt** key and typing the character's ANSI code.

Navigating with shortcut keys

A shortcut key is a unique key combination that you can use to access various InfoCentre features without using buttons or tabs. Shortcut keys work from all InfoCentre screens but not from popup windows.

This table shows the different shortcut keys.

Feature	Windows Shortcut key	Macintosh Shortcut key
Check Out	Ctrl+o (Hold down the Ctrl key and press o)	Command+o (Hold down the Command key and press o)
Check In	Ctrl+i	Command+i
Patron Status	Ctrl+s	Command+s
Copy Status	Ctrl+u	Command+u
Holds	Ctrl+r	Command+r
Bookings	Ctrl+b	Command+b
Maintain Patrons	Ctrl+m	Command+m
Maintain Title/Copy	Ctrl+t	Command+t
Next Patron	Ctrl+n	Command+n

Navigating with command barcodes

Command barcodes are barcodes that you can use instead of InfoCentre buttons, tabs, and commands. For example, to start Check Out, you can simply scan the Check Out barcode label. Command barcodes work from all InfoCentre screens but not from popup windows.

The easiest way to print command barcodes is to use the Command Barcodes circulation report.

To print command barcodes

- 1 From the Reports tab, click **Other Reports**. A list of reports appears.
- 2 Click **Command Barcodes**. The Command Barcodes screen appears.
- 3 Indicate which labels you wish to print by selecting the appropriate check boxes.
- 4 Click **Create**. InfoCentre generates the labels and displays them in the Print Preview window. From here, you can preview and print the labels.

3

Circulation

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Identifying a patron

Many circulation activities require that you select a particular patron. For example, during Check Out, you need to let InfoCentre know who is borrowing materials. Similarly, when updating a patron's personal information, you need to identify the patron.



InfoCentre displays an **Enter Patron ID** box whenever you need to identify a patron. You normally identify patrons by scanning their barcode labels, or by typing their IDs into this box and clicking the adjacent **Find Patron** or **Find** button. However, if you do not know a patron's ID you can follow the procedure described below. (You can also set up InfoCentre to identify patrons by photograph. For instructions, refer to the Help.)

To identify a patron (when you do not know the patron ID)

- 1 Leave the **Enter a Patron ID** box blank and click **Find Patron** or **Find**. The Identify patron window opens.
- 2 In the **Search for** box, enter a patron surname, homeroom, first name, or grade.
- 3 Open the **Identify By** list and indicate the type of information that you have used as your search term. Then click **Find**.
- 4 If more than one matching patron is found, InfoCentre lists them all in the Identify Patron window. Use your mouse to select the desired patron, and then click **Select**. InfoCentre uses that patron in the next phase of whatever task you are performing.

--or--

If only one matching patron is found, InfoCentre selects that patron and automatically proceeds with the next phase of whatever task you are performing.



When entering a patron name, you do not need to type the entire name. Often, just the first few letters will do.

Identifying a title or copy

Many circulation and cataloging activities require that you select a particular title or copy. For example, before you can check out a copy, you need identify the copy.



InfoCentre displays an **Enter a Copy ID** box whenever you need to identify a copy. You can identify copies by scanning their barcode labels, or by typing their IDs into this box and clicking the adjacent **Find Copy** or **Find** button. However, if you do not know a copy's ID you can follow the procedure described below.

To identify a title or copy

- 1 Leave the **Enter a Copy ID** box blank and click **Find Copy** or **Find**. The Identify Title/Copy window opens.
- 2 In the **Search For** box, enter a search term. Depending on your selection in the **Identify By** list, this could be a title, author, ISBN, LCCN, ISSN, series, keyword, copy ID, call number, or copy type.
- 3 Open the **Identify By** list and indicate the type of information that you are using to identify the title.
- 4 Click **Find**. InfoCentre lists all titles that match your search term.
- 5 Click the desired title. InfoCentre lists the copies for this title in the lower portion of the screen.
- 6 To identify a copy, click the copy that you wish to identify. (If the task you are performing requires only a title, you do not have to select a copy.)
- 7 Click **Select**.



You can view a title's detailed catalog information in the Identify Title/Copy window. In the Titles list, select the title. Then, depending on the format you prefer, click either the **Title** or **MARC** tab (in the lower portion of the window).

Checking out copies



The check out process described in this manual uses the default Standard Circulation Desk interface. If you are using the Spectrum Circulation Desk interface, consult the InfoCentre Help.

Checking out copies involves two steps: identifying the borrowing patron and identifying the copies to be checked out. You do all of this from the Check Out screen.

To access the Check Out screen

From the Circulation tab, click **Check Out**. The Check Out screen appears.



You can also access the Check Out screen by scanning the Check Out command barcode or by pressing **Ctrl+o** (Windows) or **Command+o** (Macintosh).

To identify the patron

From the Check Out screen, scan the patron's barcode label.

--or--

Type the patron's ID in the **Patron ID** box. Then click **Find Patron**.

InfoCentre displays basic information about this patron.

Now you can identify the copies to be checked out.



If you do not know the patron's ID, you can identify the patron by leaving the **Patron ID** box blank and clicking **Find Patron**.

To identify copies

- 1 If you have not already done so, identify the patron checking out the copies.
- 2 Scan the copy's barcode label.
--or--
Type the copy ID in the **Copy ID** box. Then click **Find Copy**.
- 3 If the patron is checking out more than one copy, follow the same procedure to identify the remaining copies.
- 4 When you have finished checking out copies to this patron, click **Next Patron**.



If the Auto-Discriminate Barcode option has been set to **Yes**, InfoCentre can tell the difference between patron and copy barcodes. This means that you do not need to click **Next Patron**. Instead, simply scan the next patron's barcode.

For more information about the Auto-Discriminate Barcode option, see the Help topics *About the Miscellaneous Settings Screen (Circulation)* and *How to specify circulation settings*.

Changing the due date

Normally InfoCentre calculates due dates based on the loan periods set up in Administration. However, where necessary, you can specify a different due date.

To change the due date

- 1 From the Check Out screen, identify the patron checking out or renewing copies.
- 2 Click **Due Date**. The Special Due Date window appears.
- 3 Use the calendar to select the new due date.
- 4 To specify a particular time due (optional), select the **Time Due** check box, and enter the desired time. Make sure you use a 12 hour clock and specify AM or PM (for example, *10:15 PM*).
- 5 Indicate whether the due date applies to just this patron or to all patrons by selecting the appropriate option.
- 6 Click **OK**.



The new due date applies only to the current workstation.



If you select the **All patron checkouts/renewals until special due date cancelled** option, you must cancel the due date when you no longer want it to apply.

To cancel a special due date

- 1 From the Check Out screen, click **Due Date**. The Special Due Date window appears.
- 2 Click **Use Default**.



You can also use the Schedules feature to set a global due date and then use the Patron Type feature to apply that date to a particular type of patron. For more information, see the Help topics *About Schedules* and *About Patron Types*.

Viewing copy status from the Check Out screen

After checking out a copy, you can quickly view its copy status information.

To view copy status information

From the list of checked out copies (in the lower portion of the Check Out screen), click the copy's ID. InfoCentre displays the Copy Status screen.

About check out and renewal messages

InfoCentre uses messages to alert you when there is something you need to know about the borrowing patron or about the copy you are checking out or renewing.



Depending on the message, you may be required to enter the override password before continuing with the checkout/renewal. If you do not know the Override password, consult your InfoCentre administrator.

Renewing copies



The renewal process described in this manual uses the default Standard Circulation Desk interface. If you are using the Spectrum Circulation Desk interface, consult the InfoCentre Help.

There are two ways to renew a copy. You can recheck it out to the borrowing patron or you can select it from a list of currently checked out copies.

Check out method

You can renew a copy simply by checking it out again.

To renew a copy by checking it out

Access the Check Out screen, identify the patron and check out the copy, just as you would for a normal check out. InfoCentre recalculates the due date based on today's date. (If you specified a special due date, InfoCentre uses that instead of the calculated due date.)

List method

If InfoCentre has been set up to display current checkouts, you can view a list of all copies currently checked out to the current patron. You can then use this list to renew copies.



Before you can use this method, the Display Current Checkouts option must be set to **Yes**. For more information about setting this option, see the Help topics *How to specify circulation settings* and *About the Miscellaneous Settings screen (Circulation)*.

To renew a copy by selecting it from a list

- 1 Access the Check Out screen, and identify the patron, just as you would for check out. InfoCentre displays a list of the copies currently checked out to the patron.
- 2 Use your mouse to select the copy or copies that you want to renew. (To select a single copy, click it. To select multiple copies, hold down the **Ctrl** key (Windows) or the **Command** key (Macintosh) and click each of the copies that you want to select.)
- 3 Click **Renew**.



You can also use this method to renew items from the Patron Status screen. For help viewing a patron's status, see *Viewing a patron's status* on page 53.

Checking in copies



The check in process described in this manual uses the default Standard Circulation Desk interface. If you are using the Spectrum Circulation Desk interface, consult the InfoCentre Help.

During Check In, InfoCentre automatically updates the patron's record, the copy's status, and calculates any applicable fines. After checking in the copy, you can view information about the borrowing patron and, if necessary add a note to the patron's record.

To check in a copy

- 1 From the Circulation tab, click **Check In**. The Check In screen appears.
- 2 Scan the copy's barcode label.
--or--
Type the copy ID in the **Copy ID** box. Then click **Find Copy**.



If you do not have time to view messages about fines and other issues, select the **Fast Check In** option. Fines are still applied, and check in messages logged. However, instead of displaying this information on the screen, InfoCentre logs it in the Check In Exception list. You can print this list by clicking the **Print Exceptions** button at any time prior to leaving the Check In screen.



If you do not know the copy's ID, leave the **Copy ID** box blank. Then click **Find Copy** and identify the copy using the Identify Copy window.

Viewing patron and copy status from the Check In screen

After checking in a copy, you can quickly view its copy status information or the patron status information for the patron who had it checked out.

To view patron status information

From the list of checked in copies (in the lower portion of screen), click the patron's name. InfoCentre displays the Patron Status screen.



Depending on how InfoCentre has been configured, the list may show patron IDs rather than names. If so, click the patron's ID to display the Patron Status screen.



You can add a message to the patron's record. From the Patron Status screen, click the contents of the Messages field. InfoCentre displays a window so that you can add, edit, and delete patron messages.

To view copy status information

From the list of checked in copies, click the copy's ID. InfoCentre displays the Copy Status screen.

Changing the check in date

Normally, InfoCentre uses the current date and time (based on your server's clock) as the check in date. However, if this date or time is not appropriate, you can specify a different date.

To change the check in date

- 1 From the Check In screen, click **Change Date**. The Change Check In Date window appears.
- 2 Use the calendar to select the new date.
- 3 To specify a particular check in time, select the **Check In Time** check box, and enter the desired time. Use a 12 hour format and specify AM or PM (for example, *10:15 PM*).
- 4 Click **OK**.



The new date applies only to the current workstation. Also, once you exit the Check In screen, the check in date is reset to the current date and time.

To revert to the current date and time

- 1 From the Check In screen, click **Change Date**. The Change Check In Date window appears.
- 2 Click **Use Today**.

About check in messages

InfoCentre uses messages to alert you that there is something you should know about the copy you are trying to check in. For example, the copy may be overdue, on hold, already checked in, and so on.

Charging and paying fines

The method you use to charge and pay fines can vary depending on the reason for the fine.

Fines for overdue copies

Whenever you check in or renew an overdue copy, InfoCentre automatically charges the applicable fine to the patron's account. If you are using standard check in, InfoCentre displays a window notifying you of the fine and allows you to record a fine payment. If you are using the **Fast Check In** option, the fine is still charged; however, you are not given the option of paying it at this time.



If you are using the **Fast Check In** option, or if you simply choose not to record a fine payment during check in, you can pay it later using the Patron Status feature. For more information, see *Managing a patron's fines from Patron Status* on page 54.

Fines for lost copies

When you change a copy's status to LOST, InfoCentre displays the Lost Copy window so that you can specify a fine. You are also given the option of recording a fine payment. For more information, see *Changing a copy's status* on page 56.



If you choose not to record a fine payment at this time, you can do it later using the Patron Status feature. For more information, see *Managing a patron's fines from Patron Status* on page 54.

Other fines

You can charge fines, adjust fines, and record fine payments from the Patron Status feature. For more information, see *Managing a patron's fines from Patron Status* on page 54.

Viewing a patron's status

You can use the Patron Status screen to view information about a patron's current checkouts, holds, bookings, outstanding fines, and so on. You can also renew any copies currently checked out, edit and remove holds or bookings, charge or pay fines, and view fine history.

To view a patron's status information

- 1 From the Circulation tab, click **Patron Status**. The Patron Status screen appears.
- 2 Scan the patron's barcode label.
--or--
Type the patron's ID in the **Patron ID** box. Then click **Find Patron**.

InfoCentre displays the patron's information. Scroll through the screen to view checkouts, holds, bookings, fines, and other information.



If you do not know the patron's ID, you can identify the patron by leaving the **Patron ID** box blank and clicking **Find Patron**. Then identify the patron using the Identify Patron window.

Managing a patron's fines from Patron Status

You can use the Patron Status feature to pay, charge, and adjust fines.

To pay a fine

- 1 If you have not already done so, start the Patron Status feature and view the patron's status information.
- 2 In the Fines section of the screen, click the fine that you want to pay.
- 3 Click **Pay Fine**. The Pay Fine window appears.
- 4 In the **Payment Amount** box, enter the amount of the payment.
- 5 In the **Note** box, enter a brief description of the fine transaction. (This step is optional.)
- 6 Click **Done**.

To pay all fines

- 1 If you have not already done so, start the Patron Status feature and view the patron's status information.
- 2 In the Fines section of the screen, click **Pay Total Fines**. The Pay Total Fines window appears.
- 3 In the **Payment Amount** box, enter the amount of the payment.
- 4 Click **Pay Now**.

To charge a fine

- 1 If you have not already done so, start the Patron Status feature and view the patron's status information.
- 2 In the Fines section of the screen, click **New Fine**. The New Fine window appears.
- 3 In the **Fine Amount** box, enter the amount of the fine.
- 4 If the fine is related to a specific copy, enter the copy's ID in the **Copy ID** box. (If you do not know the copy ID, click the **Copy ID** button to search for the copy.)
- 5 If the patron is making a payment at this time, enter the amount in the **Payment Amount** box.
- 6 In the **Note** box, enter a brief description of the transaction. (This step is optional.) We suggest you use this field to record the reason for the fine.
- 7 Click **Done**.

To adjust a fine

- 1 If you have not already done so, start the Patron Status feature and view the patron's status information.
- 2 In the Fines section of the screen, click the fine that you want to adjust.
- 3 Click **Adjust Fine**. The Adjust Fine window appears.
- 4 In the **New Amount Due** box, enter the new amount for the fine.
- 5 In the **Note** box, enter the reason you are adjusting the fine. (This step is optional.)
- 6 Click **Done**.

Viewing and changing a copy's status

You can use the Copy Status screen to view information about a copy's current status and to view information about any holds or bookings.

To view a copy's status information

- 1 From the Circulation tab, click **Copy Status**. The Copy Status screen appears.
- 2 Scan the copy's barcode label.
--or--
Type the copy's ID in the **Copy ID** box. Then click **Find Copy**.



If you do not know the copy's ID, you can identify the copy by leaving the **Copy ID** box blank. Then click **Find Copy** and identify the copy using the Identify Copy window.

Changing a copy's status

You can change a copy's status to Lost or Claimed Returned from the Copy Status screen.

To change a copy's status to Lost

- 1 If you have not already done so, start the Copy Status feature and view the copy's status information.
- 2 Click **Lost**. A message appears asking if you are sure that you want to mark the copy as lost.
- 3 Click **Yes**.



If the copy is currently checked out, the Lost Copy window appears so that you can issue a fine and/or charge the patron for the lost copy. Enter the various amounts in the relevant boxes and click **Done**.

To change a copy's status to Claimed Returned

- 1 If you have not already done so, start the Copy Status feature and view the copy's status information.
- 2 Click **Claimed Returned**. A message appears asking if you are sure that you want to change the status to Claimed Returned.
- 3 Click **Yes**. The Claimed Returned window appears so that you can issue a fine and/or charge the patron for the copy.
- 4 Enter the applicable fine, charges, and payments.
- 5 Click **Done**.

Recording in-library use

Instead of checking out copies, patrons may decide to use them in your library. Before reshelving copies collected from patron work areas, use the In-library Use feature to record this in-library usage.

To record in-library use

- 1 From the Circulation tab, click **In-library Use**. The In-library Use screen appears.
- 2 Scan the copy's barcode label.
--or--
Type the copy ID in the **Enter a Copy ID** box. Then click **Find Copy**.



If you do not know the copy's ID, leave the **Enter a Copy ID** box blank. Then click **Find Copy** and identify the copy using the Identify Copy window.



After recording in-library usage for a copy, you can view its copy status information. Locate the copy in the Copies list (lower portion of the screen), and click its copy ID. InfoCentre displays the Copy Status screen.

4

Cataloging

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Adding a title

The Title Information screen lets you catalog without worrying about MARC tags, subfields, and other elements of the MARC record. You simply enter information in descriptively labeled fields. Later, when you save the record, InfoCentre converts the information you have entered into an industry-standard MARC record. (For more information about MARC records, see *What are MARC records?* on page 67.)

To add a title

- 1 From the Cataloging tab, click **Maintain Title/Copy**. The Title Information screen appears.
- 2 Open the **Template** list and choose the template that corresponds to the type of material you are cataloging. InfoCentre adjusts the other fields on the screen so that only fields pertaining to this material type are displayed.
- 3 Enter the information for the new title.
- 4 To preview the record, click **Preview**. When you have finished previewing, close the Preview window.
- 5 Click **Save**.



To have InfoCentre add correct punctuation to the end of key fields, click **+Punctuation**. For a full description of this button and the fields affected, see the Help topic *About the Title Information* screen.



You can add more subject and added entry fields to the screen by clicking **Add Subject** or **Add Entry**.



If the title has a lot of the same information as an existing title, you can save time by duplicating the existing title. Then, before saving, change any fields that differ between the two titles. For more information about duplicating a title, see the Help topic *How to duplicate a title*.

You can also add a title using the MARC Information screen. For more information, refer to the Help.


Editing a title

You can edit titles from either the Title Information or MARC Information screens.

To edit a title


- 1 From the Cataloging tab, click **Maintain Title/Copy**. The Title Information screen appears.
- 2 If you wish to use the MARC Information screen for editing, click the **MARC Information** tab.
- 3 Click **Find**. The Identify Title/Copy window appears so that you can identify the title you want to edit.
- 4 Identify the title. For help identifying a title, see *Identifying a title or copy* on page 43. When you have finished, InfoCentre displays the title's information.
- 5 Make your changes.
- 6 Click **Save**.

Deleting a title

 When you delete a title, all of its copies are also deleted. Deleting also removes the title's holds and bookings, and clears its circulation history.

To delete a title

- 1 From the Cataloging tab, click **Maintain Title/Copy**. The Title Information screen appears.
- 2 Identify the title that you want to delete. (For help identifying a title, see *Identifying a title or copy* on page 43.) When you have finished, InfoCentre displays the Title Information screen for the title.
- 3 Click **Delete**. InfoCentre displays a message asking if you are sure that you want to perform the deletion.
- 4 Click **Yes**.

 If any of the title's copies are checked out, InfoCentre does not permit the deletion.

Working with copies

You can add, edit and delete copies from the Copy Information screen.

To access the Copy Information screen

- 1 From the Cataloging tab, click **Maintain Title/Copy**. The Title Information screen appears.
- 2 Click the **Copy Information** tab.

How the screen works

InfoCentre lists all of the title's copies in the lower section of the screen. Before editing or deleting a copy, you must select it by clicking it. After you do this, the top portion of the screen shows the fields for the selected copy. You can edit the copy's information by changing the information in these fields.

Title Information		Copy Information		MARC Information	
* Copy ID	2751	Vendor		Fund	
Call Number	919.8 PEA	Price	\$10.00	Location	Media Center
* Copy Type	Book	Date Added	Nov 17, 2005		
Public Note					
Private Note					
Copy ID	Call Number	Copy Type	Book Cart		
2749	919.8 PEA	Book			
2750	919.8 PEA	Book			
2751	919.8 PEA	Book			

Copy edit area. Use these fields to add or edit information for the selected copy.

Selected copy

Copy selection area. Use this section to select the copy that you want to work with.

Adding a copy

You can add copies to any new or existing title.

To add copies

- 1 From the Cataloging tab, click **Maintain Title/Copy**. The Title Information screen appears.
- 2 If you are adding copies to an existing title, identify the title. For help, see *Identifying a title or copy* on page 43.
--or--
If you are creating a new title, enter the title's information.
- 3 From the Title Information screen, click the **Copy Information** tab. The Copy Information screen appears.
- 4 If the title already has one or more copies, click **New Copy**. InfoCentre adds a new copy to the Copies list and displays the fields for this copy in the copy edit area near the top of the screen.
- 5 In the copy edit area, enter the copy's information.
- 6 Follow the same procedure to add any additional copies. When you have finished adding copies, click **Save**.



If the new copy has a lot of the same information as an existing copy, you can save time by duplicating the existing copy. Then, before saving, change any fields that differ between the two copies. For more information about duplicating a copy, see the Help topic *How to duplicate a copy*.

Editing a copy

You can easily change information for an existing copy.

To edit a copy

- 1 From the Cataloging tab, click **Maintain Title/Copy**. The Title Information screen appears.
- 2 Identify the copy's title. For help identifying a title, see *Identifying a title or copy* on page 43.
- 3 From the Title Information screen, click the **Copy Information** tab. The Copy Information screen appears.
- 4 In the Copies list at the bottom of the screen, click the copy that you want to edit. InfoCentre displays the fields for this copy in the copy edit area near the top of the screen.
- 5 In the copy edit area, make your changes.
- 6 Click **Save**.

Deleting a copy



When you delete a copy, InfoCentre automatically removes all of the copy's holds and bookings and clears its circulation history.

To delete a copy

- 1 From the Cataloging tab, click **Maintain Title/Copy**. The Title Information screen appears.
- 2 Identify the copy's title. For help identifying a title, see *Identifying a title or copy* on page 43.
- 3 From the Title Information page, click the **Copy Information** tab. The Copy Information screen appears.
- 4 In the Copies list at the bottom of the screen, click the copy that you want to delete.
- 5 Click **Delete**. InfoCentre displays a message asking if you are sure that you want to delete the copy.
- 6 Click **Yes**.



InfoCentre will not allow you to delete a copy that is checked out.

What are MARC records?

The Library of Congress has established a standard format for storing library catalog information on electronic media. This standard is called *M*ACHINE *R*EADABLE *C*ATALOGING or MARC. Simply stated, MARC records are the computerized equivalent of catalog cards in a traditional non-automated library.

There is a single MARC record per title. This single MARC record contains the title's bibliographic information as well as information about each of the title's copies (holdings).



For detailed information about MARC records, visit the Library of Congress MARC Standards Web page at <http://www.loc.gov/marc/marc.html>.

Like all industry-standard library automation software, InfoCentre uses the MARC format to store bibliographic and copy information. This means that you can easily import MARC records from book vendors and other outside sources into your InfoCentre collection. You can also export MARC records from InfoCentre so that they can be used with other software.

Importing MARC records

You can import any MARC record as long as it adheres to the industry-standard MARC 21 format (also known as USMARC/852 Holdings Data).



When importing, the term *refresh* means to use information in the import file to update existing records. The term *add* means to use the information in the import file to add new records.

To import MARC records

- 1 From the Cataloging tab, click **Import**. The Import MARC Records screen appears.
- 2 Specify the import options. For detailed information about the various options, see the Help topic *About the Import MARC Records screen*.
- 3 If you are importing new copies, click the **Default Copy Values** tab and specify the default copy values. (For more information about any of the fields on this tab, see the Help topic *About the Default Copy Values tab*.) When you have finished, click the **Import** tab.
- 4 Click **Browse**. Then select the file containing the MARC records that you want to import.
- 5 Click **Import**. InfoCentre starts the import and displays a message telling you that the import is in progress.

Exporting MARC records

You can copy MARC records from InfoCentre to a file. This process is called *exporting*. Exported records will be in the MARC 21 format and can be used by other industry-standard applications.



All standard bibliographic fields are exported. If you set the Export Copies option to **Yes**, most copy fields are also exported. For a list of exported copy fields, see the Help topic *About exporting MARC records*.

To export MARC records

- 1 From the Cataloging tab, click **Export**. The Export MARC Records screen appears.
- 2 In the Select and Sort by section of the screen, open the list and choose a range type. Then use the **Range from** and **To** boxes to specify the range. InfoCentre exports only those records that fall within the specified range.
- 3 In the Limit To section of the screen, specify any limits. InfoCentre limits the export so that it includes only records with the values you specify.
- 4 In the **Export File** box, enter the full path and name of the export file. (This is the file that will contain the exported records.) Alternatively, click **Browse** to navigate to the desired location, and then enter a file name.
- 5 Click **Export**. InfoCentre starts the export and displays a message warning you that exporting can take a significant amount of time.



Do not shut down InfoCentre on this computer until the export is complete.

5

Reports

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Choosing a report

You select all reports from the Reports tab.

To choose a report

- 1 From the Reports tab, click the button corresponding to the type of report that you want to generate. (For example, to generate a circulation report such as overdue notices, click the button labeled **Circulation Reports**.) A list of relevant reports appears.
- 2 Click the report that you wish to generate.



For more detailed information and instructions for generating specific reports, view the Help topics for that report.



Once you have chosen a report, you can return to the initial report list. Simply click, the relevant button. For example, from the Overdue Notice screen, you can return to the list of circulation reports by clicking the **Circulation Reports** button.

Viewing and printing a report

When you generate a report, InfoCentre first displays it in the Print Preview window. You can then view the report, print it, email it, and even save it to a file.

To view a report

- 1 After InfoCentre displays the report in the Print Preview window, use the navigation bar at the bottom of the window to move to the desired page.
- 2 Use the scroll bars at the right and bottom right sides of the window to move within a page.



For more information about using the navigation bar and other elements on the Print Preview window, see *About the Print Preview window* on page 74.

Printing a report

There are two print features:

- **Quick Print.** Use this when you want to print one copy of the entire report on your default printer without specifying the page layout, page setup, or other printer options.
- **Print option on the File menu.** Use this when you want more control of the printing process. Among other things you can select a printer, as well as specify the pages to print, number of copies, media type, orientation, and margins.

To print a report using the Quick Print feature

After InfoCentre displays the report in the Print Preview window, click the **Quick Print** button.



Quick Print button.

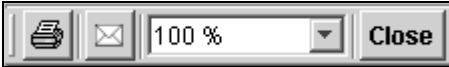
To print a report from the File menu

- 1 After InfoCentre displays the report in the Print Preview window, open the File menu by clicking the word **File** located at the top left corner of the window.
- 2 Click **Print**. The Print window opens.
- 3 On each of the General, Page Setup, and Appearance tabs, specify your print options.
- 4 Click **Print**.






About the Print Preview window

This section describes the elements in the Print Preview window.

Toolbar

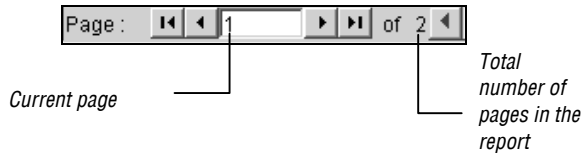






Use the toolbar to print or email the report, change the zoom setting, and close the window.

Element	Description
	Quick Print button. Prints one copy of the entire report to your default printer. (When you need more control over printing, use the Print option from the File menu.)
 or 	Email button. Emails the report or notices. When emailing a report, InfoCentre opens a window so that you can specify the email address. When emailing notices, InfoCentre automatically uses the email addresses in the patron database. (You are given the opportunity to print notices for patrons that do not have email addresses.) For more information about emailing reports and notices, see the Help topic <i>How to email reports and notices</i> . <i>Note:</i> Before using this feature, set up the email options in Administration. For more information, see the Help topics <i>About the Email Settings screen</i> and <i>How to specify email settings</i> .
	Zoom list. Increases and decreases the zoom (enlarges or reduces the display).
	Close button. Closes the Print Preview window.

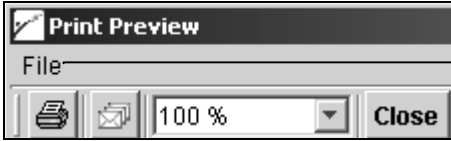
Navigation bar

Use the navigation bar to move through the report.



Button	Description
	Displays the first page.
	Displays the last page.
	Displays the previous page.
	Displays the next page.

File menu



Click the word "File" to open the menu.

The file menu has these options:

Menu option	Description
Save As	<p>Opens the Save As submenu. It has these options:</p> <p>CSV (Comma delimited) File. Saves the report to a CVS format that can be opened and edited in most spreadsheet applications.</p> <p>Adobe PDF File. Saves the report to a PDF format that can be viewed using Adobe® Reader®. (You can download Adobe Reader from the Adobe Systems Incorporated Web site.)</p>
Print	<p>Opens the Print window so that you can print the report. This method of printing provides you more control than the Quick Print button on the toolbar. Among other things you can select a printer, as well as specify the pages to print, number of copies, media type, orientation, and margins.</p>

Generating overdue notices

You can customize notices by including fines information, specifying a sort order, generating notices for only a specific group of patrons and more.

To access the Overdue Notice feature

- 1 From the Reports tab, click **Circulation Reports**. A list of circulation reports appears.
- 2 Click **Overdue Notice**. The Overdue Notice screen appears.

Specifying the notice type

You can specify the number of notices per page.

To specify the number of notices per page

In the Notice Type section of the Overdue Notice screen, indicate whether you want InfoCentre to print one or three notices per page.

Specifying sort order and patron ranges

You can use up to three pieces of patron information to sort the notices. You can also specify a patron range based on your sort criteria. If you do, InfoCentre generates notices for only those patrons that fall within the specified range.

To specify sort order and patron range

- 1 In the **Select and Sort By** section of the screen, open the first list and choose your primary sort criteria.
- 2 If you also want to use this criteria to specify a patron range, enter the appropriate values in the adjacent **Range From** and **To** boxes.
- 3 Open the second **Select and Sort by** list and choose the secondary sort criteria. If you want to use this piece of patron information to further specify a patron range, enter the appropriate values in the adjacent **Range From** and **To** boxes.
- 4 Open the third **Select and Sort by** list and choose the final sort criteria. If you want to use this piece of patron information to further specify a patron range, enter the appropriate values in the adjacent **Range From** and **To** boxes.

Specifying limits



If you specified a **Select and Sort By** range, InfoCentre first selects patrons based on that range. Within that range, you can further select patrons by specifying limits.

You can limit notices by patron type, copy type, due date, and hourly checkouts. If you do, InfoCentre includes only those patrons and copies with the specified values.

To limit notices by patron type and copy type

In the **Limit To** section of the screen, open the relevant list and choose the desired type(s).



To include all types, leave the list blank. To select multiple types, hold down the **Ctrl** key (Windows) or the **Command** key (Macintosh) and click each of the desired types.

To limit notices to a due date range

- 1 In the first Due date box, click the arrow to display the calendar. Then select the first date in the range.
- 2 In the **To** box, click the arrow to display the calendar. Then select the last date in the range.



If you enter a starting date but not an ending date, InfoCentre includes only those overdue copies with due dates on or after the date you specified. Similarly, if you enter an ending date, but not a starting date, InfoCentre includes overdue copies with due dates on or before the date you specified.

To limit notices to include only copies with hourly loan periods

Select the **Hourly Checkouts Only** check box.



To generate notices for patrons with outstanding fines, even if those patrons do not have overdue copies, set the Include Patrons with Fines But No Overdues option to **Yes**.

Customizing the notices

You can further customize the notices using the Custom Report Designer. Among other things you can add and remove fields, adjust the placement of fields, and specify the fonts used in the notices.

To open the Custom Report Designer

Click **Customize**.

For help using the Custom Report Designer, see the Help topic *How to customize a report*.

Specifying messages

InfoCentre lets you change the various messages that appear on the overdue notices. For a description of these messages and exactly where on the notice they are printed, see the Help topic *About the Overdue Notice screen*.

To specify messages

- 1 In the Notice Messages section of the screen, locate the message that you wish to customize.
- 2 In the adjacent box, enter the text for the message.



If you enter a long overdue message, make sure you also enter a number in the **Print When ___ Days Late** box (or **When ___ Hours Late** box). InfoCentre includes the message only for copies that are overdue by the specified length of time.

Any changes you make to the messages persist between sessions. The next time you access the Overdue Notice screen, InfoCentre automatically enters the messages you specified in the previous session.

Generating the overdue notices

After you have specified ranges and other criteria, you can generate the notices.

To generate overdue notices

Click **Create**. InfoCentre displays the notices in the Print Preview window. From here, you can preview, print, email, and save the notices to a file.

Generating copy barcodes



Before printing barcode labels, make sure that label stock and other copy barcode options are set up correctly from Administration. For more information, see the Help topics *How to specify copy barcode settings* and *About the Copy Barcodes screen*.

There are two ways to generate copy barcode labels from within InfoCentre.

- **Specify a copy range.** You can specify a range of titles, call numbers, copy IDs, or Authors and have InfoCentre generate barcodes for each copy falling within that range. You can limit the range to include only those copies that were added or edited during a particular period of time. You can also limit the range to include only those copies that have a particular copy type. For instructions, see *Generating a range of copy barcodes* on page 81.
- **Create a list of copy IDs.** You can create a list of copy IDs and have InfoCentre generate barcodes for each copy in the list. For instructions, refer to the Help topic *How to generate copy barcodes from a list*.

Generating a range of copy barcodes

You can print barcodes for only specific copies, change the sort order, print multiple barcodes for each copy, and specify where on the first page InfoCentre should start printing.

To access the Copy Barcodes feature

- 1 From the Reports tab, click **Cataloging Reports**. A list of cataloging reports appears.
- 2 Click **Copy Barcode Labels**. The Copy Barcodes screen appears.

Specifying sort order and range

You can choose how the barcodes should be sorted. You can also specify a range based on your sort criteria. If you do, InfoCentre prints barcodes for only those copies that fall within the specified range.

To specify sort order and range

- 1 From the Copy Barcodes screen, click the **Select by Range** tab. Then open the **Select and Sort by** list and choose your sort criteria.
- 2 If you also want to use this criteria to specify a range, enter the appropriate values in the **Range From** and **To** boxes.

Specifying limits

You can specify a range of Date Added or Date Edited values. If you do, InfoCentre generates barcodes for only those copies that were added or edited within the specified time frame. Similarly, you can specify a copy type and have InfoCentre generate barcodes for only those copies with the specified type.



If you also specified a Select and Sort By range, InfoCentre first selects copies based on that range. Within that range, copies are further selected by the limits that you specify.

To set Date Added and Date Edited limits

- 1 In the Limit To section of the screen, in the first box for the desired date field, click the arrow to display the calendar. Then select the first date in the range.
- 2 In the **To** box, click the arrow to display the calendar. Then select the last date in the range.

To set a copy type limit

Open the **Copy Type** list and choose the desired type(s).

Specifying options

The options section of the page allows you to specify:

- The number of barcodes that should be printed for each copy.
- Where on the first page InfoCentre should start printing.

To specify the number of barcodes per copy and starting position

- 1 In the **Number of copies to print** box, enter the number of barcodes that you want printed for each copy. For example, to print two barcodes per copy, type **2**
- 2 To have InfoCentre start anywhere other than the first label on the page, enter the appropriate values in the **Row** and **Column** box. For example, to specify that InfoCentre start at the 3rd label in the 2nd row, enter **2** in the **Row** box and **3** in the **Column** box.

Generating barcodes

Once you have specified ranges, limits, and options, you can generate the barcodes.

To generate barcodes

Click **Create**. InfoCentre displays the barcodes in the Print Preview window. From here, you can preview and print them.

6

Search Station

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Making InfoCentre available to patrons

InfoCentre's patron search station is Web-based and runs from a standard Web browser. This means that you do not need to install any InfoCentre software on the computers that your patrons use. As long as the computer has a Web browser that meets our minimum requirements, you can use it as a search station.

To access an InfoCentre search station, simply point your Web browser to

http://[serverIP]/InfoCentre/Library.do?library=[libraryID]

Where:

- [serverIP] is the IP address of the InfoCentre Server machine.
- [libraryID] is the library's ID. If you do not know the library's ID, start an InfoCentre client, access the Admin tab, click **Station**, and choose **Library Settings**. The Library Settings screen shows the name, ID, and other setup information for your library or libraries.

Switching libraries from a search station

If your InfoCentre server includes multiple libraries, you should be aware that the URLs are library-specific. Each search station works only with the library specified by the URL. Searches, circulation status, and available patron information, all apply only to the specified library.

You can change libraries from a patron search station by pointing the browser to the URL for the new library. Alternatively, you can select the library you want from the Choose Your Library page.

To select a library from the Choose Your Library page

- 1 Point the browser to **http://[serverIP]/InfoCentre/PickALibrary.do** (where [serverIP] is the IP address of the machine hosting InfoCentre Server). InfoCentre displays a list of all libraries on the server.
- 2 Click the desired library.

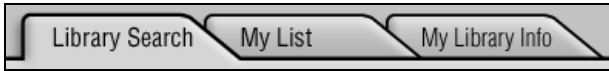
Disabling your browser's autocomplete feature

Most browsers have an autocomplete feature that enables users to see a list of data previously entered into a particular field. In a library, this feature can compromise user privacy and security, since information entered by one patron could potentially be viewed by another. As a result, most libraries automatically disable this feature.

If you have not already done this, we strongly recommend that you disable the autocomplete feature for all browsers on computers in public-access areas that will be used as InfoCentre search stations. For instructions, refer to the documentation that came with the browser.

Search Station tabs

A search station has three major areas, each accessed via its own tab: Library Search, My List, and My Library Info.



Tab	Description
Library Search	Patrons use this tab to search the library's catalog. (Depending on how your library has configured searching, they may also be able to search other libraries.) For more information, see <i>Library Search</i> on page 89.
My List	InfoCentre lets patrons create a title list by copying items from the search result. They can then use the My List tab to customize the list before printing it or saving it to a text file. For more information, see <i>My List</i> on page 96.
My Library Info	Patrons use this tab to view information about their own library account, including checkouts, holds, bookings, and fines. For more information, see <i>My Library Info</i> on page 98.



The remainder of this chapter provides a brief description of InfoCentre's search station features. For more detailed information click the ? button from any InfoCentre search station page.

Library Search

InfoCentre provides different methods of searching.

- **Quick Search** for searching with a single search term (word or phrase).
- **Advanced Search** for searching with multiple search terms and the operators AND, OR, and NOT.
- **Visual Search** and **Reading Lists** for performing predefined searches, displaying title lists, and accessing Web pages simply by clicking visual search buttons or reading list links.
- **Reading Program Search** for finding titles in your library's reading program. You enter a reading level, point value (optional), and a search term (optional). InfoCentre then searches for titles that both match your search term and have the specified reading program level and point values.
- **Other Libraries** for searching the catalogs of InfoCentre libraries other than your home library.

Quick Search

Use Quick Search to quickly search on a single word or phrase.

To perform a Quick Search

- 1 From the Library Search tab, click **Quick Search**. The Quick Search page appears.
- 2 Enter a search term in the box provided. (A search term describes what you are searching for. For example, to find information about the author J.K. Rowling, you might use the search term *Rowling*.)
- 3 Indicate the search type (title, author, subject, or keyword) by clicking the appropriate option. (To search on all categories, choose **Keyword**.)
- 4 Click **Search**.

Advanced Search

Use Advanced Search to search on more than one search term.

To perform an Advanced Search

- 1 From the Library Search tab, click **Advanced Search**. The Advanced Search page appears.
- 2 In the **Enter a word or phrase** section, type your first search term in the top box, your second search term in the center box, and your third search term (if you need one) in the bottom box.
- 3 For each search term, open the list to its right and choose the relevant search type. (For a broad all-category search, choose **Keyword**.)
- 4 For each pair of search terms, indicate whether you want InfoCentre to perform an AND search, an OR search, or a NOT search.
- 5 To limit the search to a particular location, type the location in the **Location** box.
- 6 To limit the search to a particular copy type, open the **Copy Type** list and choose the desired copy types. (To select multiple types, hold down the **Ctrl** key (Windows) or the **Command** key (Macintosh) and click each of the desired types.)
- 7 Click **Search**.

For more information about Advanced Search, click the ? button from any InfoCentre search station.

Visual Search

Use Visual Search to perform predefined searches, display title lists, and even access Web pages simply by clicking buttons.

To perform a Visual Search

- 1 From the Library Search tab, click **Visual Search**. The Visual Search page appears.
- 2 Click the visual search button that most closely represents your area of interest.
 - If the button you choose is linked to a search, InfoCentre performs the search.
--or--
 - If the button you choose is linked to a title list or a Web page, InfoCentre displays the title list or Web page.
--or--
 - If the button you choose has been configured to display more visual search buttons, InfoCentre displays the next set of buttons. Narrow your search still further by clicking the button that most closely represents your area of interest. Continue in this manner until InfoCentre performs a search, displays a title list, or displays a Web page.



InfoCentre can also be configured to include a Reading Lists search method. The Reading Lists feature is very similar to Visual Search, but instead of visual search buttons, patrons navigate by clicking text links. For more information, refer to the Help.

Reading Program Search

Use Reading Program Search to find titles in your library's reading program.

To perform a reading program search

- 1 From the Library Search tab, click **Reading Program Search**. The Reading Program Search page appears.
- 2 If your library supports multiple reading programs, open the **Reading Program** list and select the reading program for this search.
- 3 Enter the desired reading level and point level (optional) in the boxes provided. (If your library uses Lexile measures, the point level box is not present.)
- 4 Enter a search term in the **Enter a word or phrase** box (optional). If you do not enter a search term, InfoCentre finds all titles with the specified reading level and point values. If you do enter a search term, InfoCentre locates only those titles with the specified reading level and point values that also match your search term.
- 5 Click **Search**.



To search for a range of reading level or point levels, enter the starting value followed by two periods (..) and then the ending value. For example, to search for values from 5 to 6, enter 5..6



The Reading Program Search feature is available only if your library has configured InfoCentre for reading programs.

Search Other Libraries

Use Search Other Libraries to search the catalogs of libraries other than your home library.

To search other libraries

- 1 From the Library Search tab, click **Other Libraries**. The Other Libraries page appears.
- 2 Enter one or more search terms in the boxes provided. For each term, open the adjacent list and choose a search type.
- 3 To search groups of libraries, select the desired group in the Groups section of the page. To search specific libraries, select those libraries from the Libraries section of the page.
- 4 Click **Search**.



This feature is available only if your library has configured InfoCentre for searching other libraries.

For more information about Search Other Libraries, click the ? button from any InfoCentre search station.

Working with search results

After a search, InfoCentre lists the titles that match your search terms (and other criteria). This list of titles is called the search results.

Viewing 1 - 10 of 10 for WHALES			My List
<< Prev	Next >>	Sort By Title	Print Add All
Beluga whales / Prevost, John F.	599.5 PRE	In 1995.	Add
Big blue whale / Davies, Nicola.	599.5 DAV	In 1997.	Add
A closer look at whales and dolphins. Strachan, Elizabeth.	599.5 STR	In 1985.	Add
Deep sea dive	VIDEO DEE	In 1994.	Add
Killer whales and other frozen world wonders. Pearce, Q L.	919.8 PEA	In 1991.	Add
Ocean mammals / Landau, Elaine.	599.5 LAN	In 1996.	Add
Pacific Coast / McConnaughey, Bayard H.	574.5 MCC	In 1985.	Add

To sort the search results

From the Search Results page, open the **Sort By** list and choose the desired sort order.

To view detailed information about an item in the search results

From the Search Results page, click the item's title. InfoCentre displays the Details page.

Show Full	Show Copies	Show MARC	Show Card	Place Hold	Add To List
Call Number	599.5 PRE				
Status	1 copy Out, 1 copy In				
Title	Beluga whales / [by] John F. Prevost.				
Author	Prevost, John F. ;				
Series	Whales; Checkerboard animal library				
Summary	Describes the characteristics and habits of the species of whale known as the Beluga, sea canary or white whale.				
Subject	1. White whale--Juvenile literature , 2. White whale , 3. Whales .				
Reading Program(s)	Accelerated Reader AR Level: 3.6 Points: 0.5 Quiz: 12546				



You can view the title's bibliographic information in either Full, MARC or catalog card formats. To switch between formats, click the **Show Full**, **Show MARC**, or **Show Card** links near the top of the Details page.



You can view information about the title's copies by clicking the **Show Copies** link near the top of the Details page.



Depending on how InfoCentre has been configured, you may also be able to place a hold from the Details page. For more information, refer to the search station Help topic *How to place a hold*.

My List

The My List feature lets you view, sort, and edit a list of titles created from the Library Search feature. Once the list is complete, you can print the list or even save it to a text file for further editing in a word-processing or other application.

To add a single title to the list

- 1 From the Search Results page, locate the title that you want to add to the list.
- 2 Click the title's **Add** button.



When you view a title's detailed information, the Details page contains an **Add To List** button that you can use to add the title to the list.

To add all titles to the list

- 1 From the Search Results page, scroll to the top of the page.
- 2 Click **Add All**.



Lists are not saved between sessions. Once you exit InfoCentre, the list is automatically emptied. If you wish to print or save the list to a text file, make sure that you do so before exiting InfoCentre.

To view the list

Click the **My List** tab. The My List page appears.

To sort the list

- 1 If you have not already done so, view the list by clicking the **My List** tab.
- 2 Open the **Sort By** list and choose the desired sort order.

To remove a single title from the list

- 1 If you have not already done so, view the list by clicking the **My List** tab.
- 2 Locate the title that you want to remove from the list. Then click its **Remove** button.

To remove all titles from the list

- 1 If you have not already done so, view the list by clicking the **My List** tab.
- 2 Scroll to the top of the list.
- 3 Click **Remove All**.

To print the list

- 1 If you have not already done so, view the list by clicking the **My List** tab.
- 2 Click **Print**. InfoCentre opens a new window containing a printable version of the list.
- 3 Scroll to the bottom of this window and click **Print**. Then follow your standard procedure for printing from your computer. (Alternatively, use your browser's Print feature.)
- 4 When you have finished printing, click **Close** to close the window.

My Library Info

My Library Info allows patrons to view information about their own library accounts from InfoCentre search stations. Among other things they can view information about their checkouts, holds, bookings, and fines.

To view your library account information

- 1 Click the **My Library Info** tab from any InfoCentre search station. InfoCentre displays a login page.
- 2 Provide the requested identification information.
- 3 Click **Login**. InfoCentre displays information about the library account.
- 4 When you have finished viewing your account information, clear it from the screen by clicking **Clear**.



To remove a hold or booking, select its check box. Then click **Remove**. To renew a checked out copy, select its check box. Then click **Renew**.

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Uninstalling an InfoCentre client

The method you use to uninstall an InfoCentre client depends on the operating system.

To uninstall an InfoCentre client (Windows)

- 1 Use the Windows Add/Remove Program feature to remove InfoCentre. For instructions, consult the documentation that came with your version of Windows.
- 2 Using My Computer, delete the InfoCentre client folder. (If the InfoCentre client was installed using the defaults, the folder is c:\InfoCentreClient.)

To uninstall an InfoCentre client (Macintosh)

- 1 Delete the InfoCentre client folder. (If the InfoCentre client was installed using the defaults, the folder is Applications:InfoCentreClient)
- 2 Remove the InfoCenter alias from the desktop.

Advanced Installation Settings (Windows)

When installing InfoCentre Server on Windows, you can view and change various advanced settings. The following table describes the advanced settings and shows the defaults.

Setting	Description	Default
Do not install MSDE	Skips the MSDE installation. Select this option if your library has Microsoft SQL Server installed and you prefer to use it instead of MSDE.	Set to install MSDE
Database Admin ID	The administrator ID. <ul style="list-style-type: none"> • If you are installing MSDE, enter the Admin ID you want assigned to the Administrator account. • If you are using an existing Microsoft SQL Server installation, enter its Admin ID. (If you do not know the ID, contact your database administrator.) 	sa

Setting	Description	Default
Database Admin Password	<p>The administrator password.</p> <ul style="list-style-type: none"> • If you are installing MSDE, enter the password you want assigned to the Administrator account. • If you are using an existing Microsoft SQL Server installation, enter the password for its Administrator account. (If you do not know the password, contact your database administrator.) 	sagepw
Database Server Address	<p>The IP address of the computer where the database resides.</p> <p>Make sure you enter an IP address and not a machine name.</p>	127.0.0.1
Database Server Instance	The name of the MSDE or Microsoft SQL Server instance used with InfoCentre.	Sagebrush
Database Server Port	The port used to access the SQL database.	1433
InfoCentre Database Name	The name of the SQL database used to store InfoCentre data.	IC
InfoCentre Server Port	The port used for communications between InfoCentre Server and InfoCentre clients.	9101

Advanced Installation Settings (Mac OS X)

When installing InfoCentre Server on Mac OS X, you can view and change various advanced settings. The following table describes the advanced settings and shows the defaults.

Parameter	Description	Default
Database Admin ID	The administrator ID for the MySQL server.	root
Database Admin Password	The administrator password for the MySQL server.	By default, there is no password.
Database Server Address	The IP address of the computer hosting the MySQL server. Make sure you enter an IP address and not a machine name.	127.0.0.1
Database Server Port	The port used to access the SQL database.	3306
InfoCentre Database Name	The name of the SQL database used to store InfoCentre data.	IC
InfoCentre Server Port	The port used for communications between InfoCentre Server and InfoCentre clients.	9101