

InfoCentre Release Notes

Version 3.0

About this document

Welcome to InfoCentre v3.0!

This document provides a brief description of the new features and enhancements available in this release. For additional information, consult the InfoCentre Help. It provides detailed instructions for using these and all other InfoCentre features.

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Resetting the MARC Matching option

If you have previously upgraded to InfoCentre from Athena or Spectrum, the MARC Matching option may have been set to **Off**. After updating to version 3.0, you should reset this option from the Miscellaneous Settings screen (cataloging). You access the Miscellaneous Settings screen from the Admin tab by clicking **Cataloging** and choosing **Miscellaneous Settings**.



Most libraries prefer to set the MARC Matching option to **ISBN Required**. For a description of the different MARC Matching options, consult the InfoCentre client Help.

Circulation enhancements

InfoCentre version 3.0 includes a number of Circulation and Circulation Administration enhancements.

Maintaining grade and homeroom values

When you update to version 3.0, InfoCentre automatically creates Grade and Homeroom lists based on the values in your patron records. These lists are then used throughout the program; whenever anyone needs to enter a grade or homeroom value, they can simply select the appropriate value from the list.

After updating to version 3.0, you should access the Patron Field Values screen and double-check that the lists contain the values you expect. If there are misspellings or other problems, you can fix them from this screen.

To access the Patron Field Values screen, display the Admin tab, click **Circulation**, and then choose **Patron Field Values**.

Choose the list that you want to maintain by clicking one of these tabs.

For help adding, editing, and deleting values in these lists, see the InfoCentre client Help topics *How to add a patron field value*, *How to delete a patron field value*, *How to edit a patron field value*, and *About the Patron Field Values screen*.



During the update, InfoCentre creates the Grade and Homeroom lists based on your existing patron records. Misspellings and other problems in the list reflect problems with your original patron data. If the Grade and Homeroom lists are not as you expected, you may need to edit your patron data.

Choosing grade and location values throughout InfoCentre

Anywhere that InfoCentre previously provided a Grade or Homeroom text box, you will now see a Grade or Homeroom list. To enter a value, simply open the list and select the value or values that apply to your situation.

Patron Details	
* Patron ID	555
* Patron Type	Student
* Privileges Expire	Apr 1, 2008
* Surname	Hauswirth
First Name	Justin T.
Middle Name	
Email Address	
Grade	

Click here to open the Grade list.

Patron Details	
* Patron ID	555
* Patron Type	Student
* Privileges Expire	Apr 1, 2008
* Surname	Hauswirth
First Name	Justin T.
Middle Name	
Email Address	
Grade	
	7
	8
	9

Click the desired value.

Managing lost copies

InfoCentre now handles lost copies more effectively.

- In previous versions, InfoCentre assigned the status *Lost* to all lost copies, even those that were marked as *Lost and Paid For* or *Claimed Returned*. Now, where appropriate, the status values *Lost and Paid For* and *Claimed Returned* are assigned.
- You can change a copy's status from *Lost* to *Claimed Returned*, or from *Claimed Returned* to *Lost*.
- When copies with a status of *Lost*, *Lost and Paid For*, or *Claimed Returned* are checked in, their new status is shown in the Patron History and Copy History reports.

Managing fines

InfoCentre version 3.0 includes a number of enhancements that make it easier to track and manage patron fines.

Viewing estimated fines

Now you can quickly view the estimated fine for an overdue copy. Simply click the copy's due date on the Check Out, Patron Status, or Circulation Desk screen.

Check Out

Default due date: Tue, Feb 19, 2007

Name	Hauswirth, Justin T.	Grade	7	Checkouts	3
Patron ID	555	Homeroom	7a	Overdues	3
Patron Type	Student			Holds	0
Messages	None			Fines	\$20.00

Enter a Copy ID

Copy ID	Title	Call Number	Due Date	Msgs
3199	Whales.	639.9 MAR	Jan 30, 2007	
3031	A pod of killer whales.	599.5 LEO	Jan 30, 2007	
3036	Beluga whales /	599.5 PRE	Jan 30, 2007	

To view a copy's estimated fines, click the due date.

Sagebrush InfoCentre

Estimated Fine For This Overdue Item: \$6.00

Total Of Estimated Fines For All Overdue Items: \$18.00



You can disable this feature by setting the Enable Estimated Fine Popup option on the Miscellaneous Settings screen (circulation) to **No**. For more information, see the InfoCentre client Help topics *How to specify circulation settings* and *About the Miscellaneous Settings screen (circulation)*.

Deleting fine history

You can now delete fines history from the Delete Checkout History screen.

Delete Checkout History

Delete checkout history before

December 2004						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	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	31	1
2	3	4	5	6	7	8

Today: Dec 19, 2006

Delete

Patron checkout history Yes No

Copy checkout history Yes No

Checkout statistics history Yes No

Fine history Yes No

Delete

To delete fine history, set the Fine History option to Yes.



For help deleting fine history and other historic circulation data, see the InfoCentre client Help topics *How to delete checkout history* and *About the Delete Checkout History screen*.

Other fines enhancements

- The Fine History report's layout has been improved. Among other things, the balance owing is now included in the patron heading information.
- The New Fine and Adjust Fine windows now include **Cancel** buttons so that you can exit these windows without assigning or adjusting a fine.

Managing holds

InfoCentre version 3.0 makes it easier to manage holds.

Holds alert messages

As in previous versions, InfoCentre alerts you when a patron with an available hold is identified for a circulation task. However, now InfoCentre displays this alert message only when the patron is first identified. If you switch to another circulation task for the same patron, the message is not re-displayed.

Available copies

If a copy is available for a particular hold, InfoCentre now displays its copy ID in the Holds section of the Copy Status screen.

Holds for this title				
Patron ID	Patron Name	Position	Transaction Date	Available Copy
501	Elvin, Elizabeth	1	Dec 20, 2006 01:29 PM	3036
503	Gabriel, Cynthia	2	Dec 20, 2006 01:29 PM	
505	King, Janet	3	Dec 20, 2006 01:30 PM	
530	Sutton, Tamara	4	Dec 20, 2006 01:30 PM	

Copy ID of available copy

Changing a patron's position in the holds queue

With version 3.0, you can move a patron up or down in the Holds queue.

Start by displaying the copy's status and scrolling to the Holds For This Title section of the screen. Then select the patron's hold, and click **Move Up** or **Move Down**.


The screenshot shows the 'Copy Status' screen with the following details:

- Navigation:** Circulation, Cataloging, Inventory, Reports, Admin
- Copy Status:**
 - Title: **Beluga whales /**
 - Author: **Prevost, John F.**
 - Copy ID: **3036**
 - Call Number: **599.5 PRE**
 - Price:
 - Copy Type: **Book**
 - Messages: **None**
 - Status: **Out**
 - Location: **Media Center**
 - Date Checked Out: **Dec 20, 2006 01:32 PM**
 - Date Due: **Dec 20, 2006 02:32 PM**
 - Patron ID: **522**
 - Patron Name: **Spikes, Jonathan**
- Holds for this title:**

Patron ID	Patron Name	Position	Transaction Date	Available Copy
501	Elvin, Elizabeth	1	Dec 20, 2006 01:29 PM	
503	Gabriel, Cynthia	2	Dec 20, 2006 01:29 PM	
505	King, Janet	3	Dec 20, 2006 01:30 PM	
530	Sutton, Tamara	4	Dec 20, 2006 01:30 PM	

Annotations in the image point to the selected patron (503) and the 'Move Up' and 'Move Down' buttons.

For more information, see the InfoCentre client Help topic *How to move a patron within the holds queue*.


 Once a copy is available for the patron in position one, that copy stays with the patron, even if someone else is moved ahead of that patron in the queue.

Deleting a copy on hold

In the past, if the copy for an available hold was deleted, InfoCentre removed both the copy and the patron from the holds queue. In version 3.0, deleted copies are removed from the queue, but the corresponding patrons retain their position. As other copies of the title become available, they are assigned to these patrons.

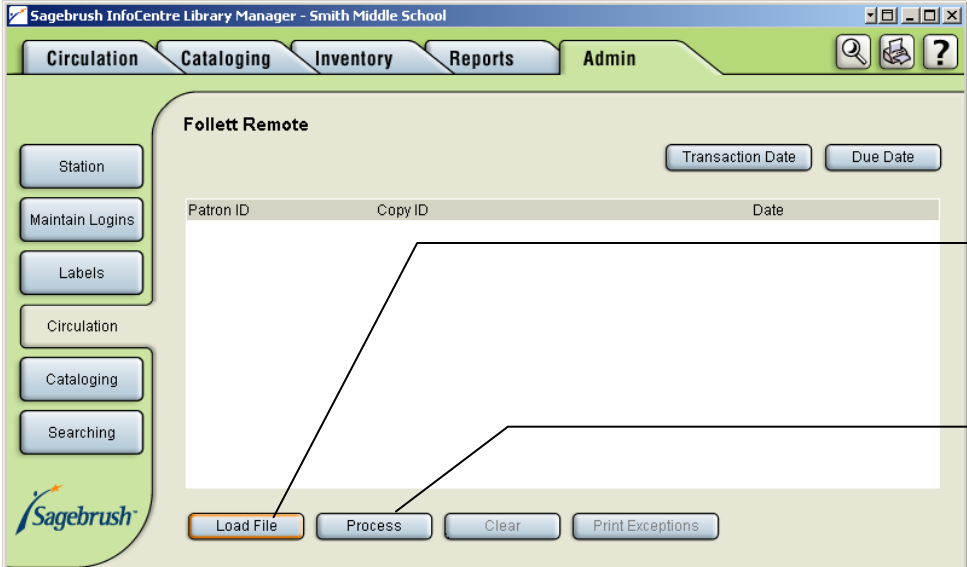
Navigating the patron database

When using Maintain Patrons, you can now move through the entire patron database, one record at a time. Simply identify a patron by ID or surname. Then click **Next** to display the next patron in the database, or click **Previous** to display the previous patron in the database. You can continue in this manner until you reach the last (or first) record in the database.

 If you identify a patron by anything other than ID or surname, clicking **Next** displays the next patron that matches your search criteria (as specified in the Identify Patron window). Similarly, clicking **Previous** displays the previous matching patron.

Follett Remote support

Now you can update InfoCentre's circulation records with circulation transactions logged with Follett Remote. From the Admin tab, click **Circulation** and choose **Follett Remote**.



1 Click **Load File**. Then choose the file containing your Follett Remote transactions.

2 Click **Process**.

For more information about this feature, see the InfoCentre client Help topics *About Follett Remote* and *How to process Follett Remote circulation transactions*. For information about purchasing Follett Remote, contact your sales representative.

Cataloging enhancements

InfoCentre version 3.0 includes several enhancements to Cataloging and Cataloging Administration.

Maintaining vendor, fund, and location values

When you update to version 3.0, InfoCentre automatically creates Vendor, Fund, and Location lists based on the values in your copy records. These lists are then used throughout the program; whenever anyone needs to enter a vendor, fund, or location value, they can simply select the appropriate value from a list.

After updating to version 3.0, you should access the Copy Field Values screen and double-check that the lists contain the values you expect. If there are misspellings or other problems, you can fix them from this screen.

To access the Copy Field Values screen, display the Admin tab, click **Cataloging**, and then choose **Copy Field Values**.

The screenshot shows the Sagebrush InfoCentre Library Manager interface. The 'Admin' tab is selected, and the 'Copy Field Values' screen is displayed. The 'Vendor' tab is active, showing a list of vendor values: Follett, Sagebrush, and Smythe & Finch. A 'Default' column shows 'Yes' for Follett. The 'Fund' and 'Location' tabs are also visible. A callout box points to the tabs with the text: "Choose the list that you want to maintain by clicking one of these tabs."

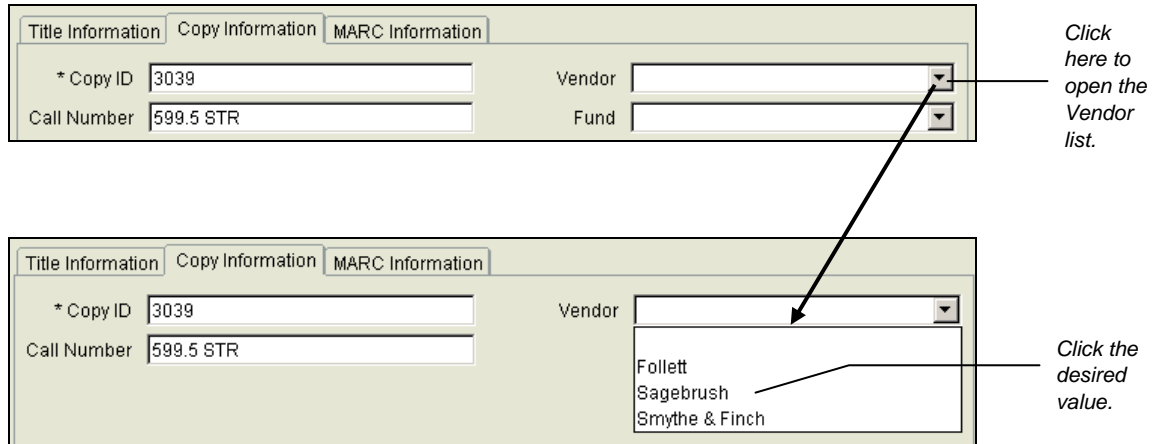
For help adding, editing, and deleting values in these lists, see the InfoCentre client Help topics *How to add a copy field value*, *How to delete a copy field value*, *How to edit a copy field value*, and *About the Copy Field Values screen*.



During the update, InfoCentre creates the Vendor, Fund, and Location lists based on your existing copy records. Misspellings and other problems in the list reflect problems with your original copy data. If the Vendor, Fund, and Location lists are not as you expected, you may need to edit your copy data.

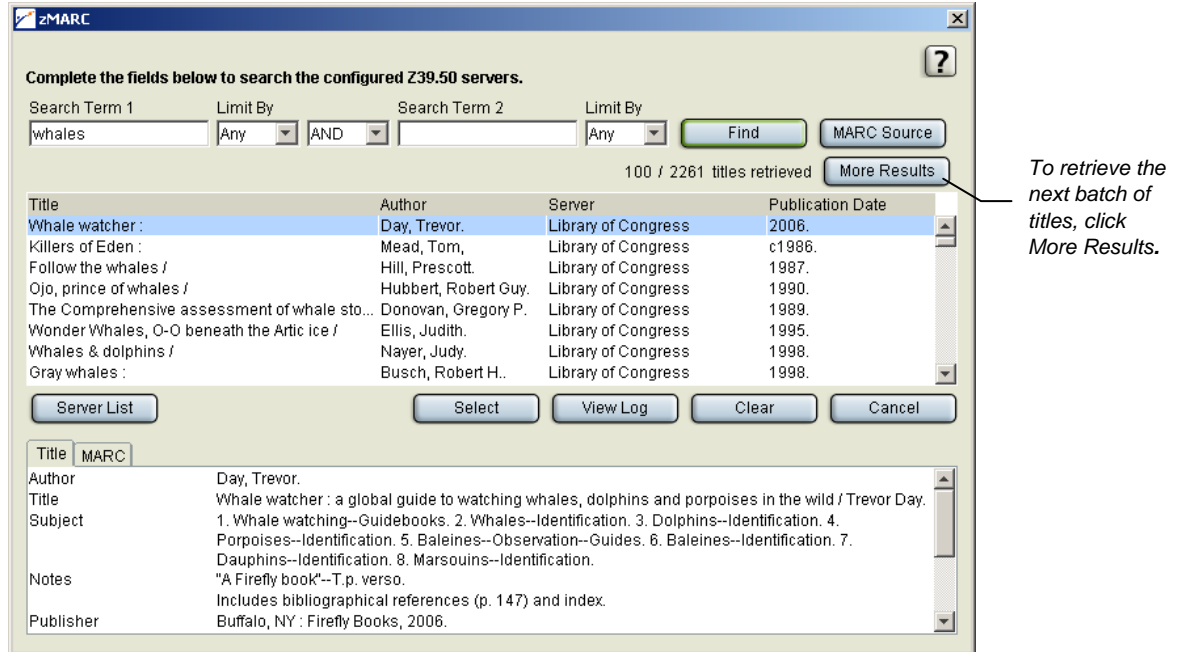
Choosing vendor, fund, and location values throughout the program

Anywhere that InfoCentre previously provided a Vendor, Fund, or Location text box, you will now see a Fund, Vendor, or Location list. To enter a value, simply open the list and select the value or values that apply to your situation.



Working with zMARC

In previous versions, a single zMARC search retrieved a maximum of 100 titles. In version 3.0, this limit no longer applies. Although InfoCentre still retrieves records in batches, you can now retrieve additional batches of records by clicking the **More Results** button.



After selecting a record and viewing or saving it within InfoCentre’s Maintain Title/Copy feature, you can now return to the zMARC search results by clicking the **zMARC** button.

Navigating the catalog

When using Maintain Title/Copy, you can now move through the entire catalog, one record at a time. Simply identify a title by author, title, copy ID, or call number. Then click **Next** to display the next title in the catalog, or click **Previous** to display the previous title. You can continue in this manner until you reach the last (or first) record in the catalog.



If you identify a title by anything other than author, title, copy ID, or call number, clicking **Next** displays the next title that matches your search criteria (as specified in the Identify Title window). Similarly, clicking **Previous** displays the previous matching title.

Viewing copy status

You can view copy status from the Maintain Title/Copy feature. Simply identify the title and display the Copy Information screen. The Copies list now includes a Status column.

Copy ID	Call Number	Status	Copy Type	Book Cart
3036	599.5 PRE	Out	Book	
3037	599.5 PRE	In	Book	

Status column

WebPath Express

WebPath Express is an Enriched Content Subscription from Follett Software Company that provides over 73,000 K-12 relevant and age-appropriate Web sites. After updating InfoCentre with WebPath Express, your patrons can find and view these Web sites simply by searching your library's catalog. And, since your WebPath Express subscription includes automatic monthly updates, your records are always current.



For more information about obtaining a WebPath Express subscription, contact your sales representative.



Special instructions for WebMARC users: For more information please refer to the Follett Software Website www.follettsoftware.com

Products>>InfoCentre>>1. Important: WebMARC Customers. Read Me First! Document.

Updating WebPath Express

After purchasing WebPath Express, you should perform a WebPath Express update. During this process, InfoCentre logs on to the WebPath Express server, downloads the relevant records, and imports them into your collection--all in a single operation. For instructions, see the InfoCentre client Help topic *How to update WebPath Express records*.



Normally, you would initiate a WebPath Express update only once. After that, InfoCentre automatically performs regular updates once a month.

Configuring WebPath Express

Configuring allows you to specify grade level and primary subject headings (Sears or Library of Congress). Later, when your patrons use WebPath Express, only Web sites relevant to the specified grade level are listed in the search results. For help with the configuration process, see the InfoCentre client Help topic *How to configure WebPath Express*.

Searching and WebPath Express

After updating, WebPath Express records can be accessed from patron search stations with traditional search methods such as Quick, Advanced, and Visual Search. In addition, InfoCentre now includes a WebPath Express Search feature that allows you to limit your searches to only WebPath Express records.

For more information about WebPath Express and searching, see *Searching with WebPath Express* on page 16.

Refreshing MARC records

When using the Import MARC Records feature to refresh records, you can now choose to match records based on their copy IDs.

Inventory enhancements

Version 3.0 includes a new inventory report as well as several enhancements to existing inventory features.

Identifying misshelved copies

The new Misshelved Copies report makes it easier than ever to identify misshelved copies. Start by inventorying items in the order that they appear on the shelf. Then generate the report. It lists:

- **Misshelved copies.** Any copies inventoried out of call number order are assumed to be misshelved and are listed in the report.
- **Adjacent copies.** To help you locate misshelved items on the shelf, InfoCentre also lists the copies shelved immediately before and after each misshelved item (or group of misshelved items). Although these copies are not misshelved, they are located next to a misshelved item. On the report, these correctly shelved items are not indented.

Call Number	Title	Copy ID
639.9 MAR	Whales.	3199
599.5 PRE	Beluga whales /	3036
599.5 STR	A closer look at whales and dolphins.	3039
639.9 MAR	Whales.	3199

Correctly shelved copies

Misshelved copies

To find a misshelved copy on the shelf, simply locate its adjacent copy. The misshelved copy should be next to it.



This report can provide meaningful information only if:

- Your library normally shelves copies in call number order.
- Sections are inventoried in call number order. For example, BIO should be inventoried before REF.
- Within a section, copies are inventoried in the same order that they are actually located on the shelf.

For more information about the Misshelved Copies report, see the InfoCentre client Help topics *How to list misshelved copies*, *How to interpret the Misshelved Copies report*, and *About the Misshelved Copies screen*.

Updating record counts

Now when you add items to inventory by loading a file, InfoCentre updates the count of entered copies to include copies from the file.

Missing Items list

In previous versions, copies accidentally inventoried twice appeared on the Missing Items list. This problem has been fixed for version 3.0.

Follett Remote support

Now you can inventory copies with Follett Remote and add them to InfoCentre's inventory. For instructions, see the InfoCentre client Help topic *How to inventory copies*.

Searching enhancements

InfoCentre has several new and enhanced searching features.

Automatically resetting patron search stations

Now you can configure InfoCentre to automatically reset patron search stations after a specific period of inactivity. If you do, InfoCentre clears My List, My Library Info, and Search Results data after a search station has been inactive for the specified length of time.

To configure this feature, set the Enable Automatic Reset option on the Miscellaneous Settings screen (Searching) to **Yes**, and then specify the length of time the station can be inactive before InfoCentre resets it. For more information about this option, see the InfoCentre client Help topics *How to specify searching settings* and *About the Miscellaneous Settings screen (searching)*.

Including reading program information in search results

The Miscellaneous Settings screen (searching) now includes a Show Reading Program option. You can use it to specify whether reading program information should be included in the search results from a Quick Search, Advanced Search, or other non-Reading Program search.

For help setting this option, see the InfoCentre client Help topics *How to specify searching settings* and *About the Miscellaneous Settings screen (searching)*.

Specifying truncated searching within a phrase

When a phrase is entered as a search term, InfoCentre now assumes that individual words within the phrase should be searched exactly as they are entered, even if Search Method option on the Miscellaneous Settings screen (searching) is set to **truncated**.



You can override this behavior and have InfoCentre use a truncated search on particular words within the phrase. Simply append the * character (asterisk) to the end of each of these words.

Phrase searching—setting word order preferences

The Miscellaneous Settings screen (searching) has a new option: Phrase Word Order. You can use this option to specify the importance of word order when searching on a phrase. You can choose between two settings.

- **Any.** When searching on a phrase, word order is not important. For example, the search term **used cars** finds the titles *Cars used in movies* and *Inexpensive used cars*.
- **Exact.** When searching on a phrase, word order is important. For example, the search term **used cars** finds the title *Inexpensive used cars*, but does not find the title *Cars used in movies*.

For help setting this option, see the InfoCentre client Help topic *How to specify searching settings*.

Search button location

The Search button has been moved to a more intuitive location. Now, you will find it near the top of the various search screens, closer to the search term text boxes.

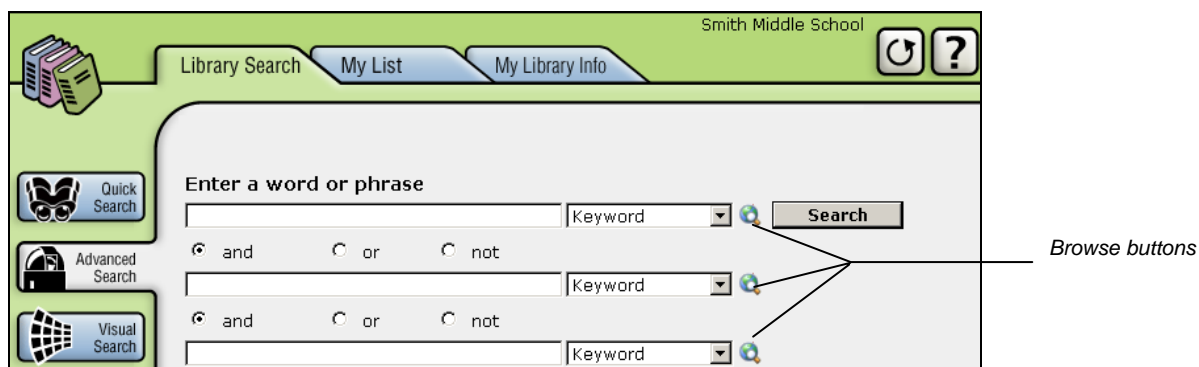
Larger work area

The area of the screen used to specify searches, view search results, and so on is larger in version 3.0 than it was in previous versions. We have accomplished this by reducing the size of the button and tab area (top and left side of the window). This enhancement will especially help those libraries with search stations that use an 800 x 600 screen resolution.

Browsing for search terms

The Browse button has been removed from the Quick Search page. This gives the page a simpler, less cluttered look, and makes the Quick Search feature less confusing for new users and younger patrons.

As with previous versions, you can browse indexes from Advanced Search. You will notice that the Browse button has a new look, but the functionality is unchanged.



Clearing search criteria

In version 3.0, all search screens contain a **Clear All** button. Clicking this button removes all search terms from the screen and resets all options to their default values.

Switching between Search features

Search terms and search types (author, subject, and so on) now persist between search methods. This means that you no longer need to re-enter search terms and types when you move between Quick Search, Advanced Search, and Other Libraries Search.

Searching on an author's name

When performing an author search, you can now enter the author's name using either the **Surname, Firstname** format (for example, *Rowling, J.K.*) or the **Firstname Surname** format (for example, *J.K. Rowling*).

Using search terms that include a single-character word

Now when searching on a title, author, subject, or keyword, you can use search terms containing single-character words. This means you can search on terms like *Malcolm X*, *Who am I*, and so on.

Performing reading program searches

In previous versions, libraries with the default reading program set to Lexile, could perform reading program searches only on Lexile. In version 3.0, this restriction no longer applies. You can perform a reading program search on any enabled reading program, even when the default is set to Lexile.

Searching with WebPath Express

WebPath Express is a subscription service from Follett Software Company that provides MARC records for relevant and age-appropriate Web sites. After updating InfoCentre with these records, you can find and view these Web sites simply by searching your library's catalog.

WebPath Express and traditional search methods

After a search, relevant WebPath Express records are included in the search results. You can then click the WebPath Express title to retrieve a list of related Web sites. This list, called the Web Site Results, contains a summary of each Web site.

WebPath Express - Web Site Results

Subject: Animals Grade Level: Middle Web Site Results ... ?

Web Sites: 1 - 25 of 155 Printable 1 2 3 4 5 7 [Next >>] | Show All

Animals Grade Level: K-5 6-8

Have you ever wondered how long certain animals live? What are some of the fastest animals? What are the largest reptiles and birds, and how big do they get? Through pages devoted to topics such as how fast animals run, where animals live, and what the largest animals are, this site presents all sorts of facts about animals, their behaviors, and their characteristics. There are also individual pages devoted to information about many specific animals, from aardvarks to zebras.

Topic: Animals
URL: <http://www.worldalmanacforkids.com/explore/animals.html>

Animals Grade Level: K-5 6-8

There is only one animal that can live longer than human beings; do you know what type of animal that is? It's the box turtle. Human beings live, on average, between 70-80 years and box turtles live up to 100 years. The opossum has the shortest life span out of any other animal on the list, only living one year. This site provides the life span of 27 different animals found from all over the world, as well as, other interesting facts about animals.

Topic: Animals
URL: <http://worldalmanacforkids.com/explore/animals4.html>

To access a Web site, click its title.

Site summary

To access a site from the Web Site Results, simply click its title.

WebPath Express Search

The new WebPath Express Search feature allows you to limit your search to only WebPath Express records.



WebPath Express Search is available only if the WebPath Express option on the Miscellaneous Settings screen (searching) is set to **On**.

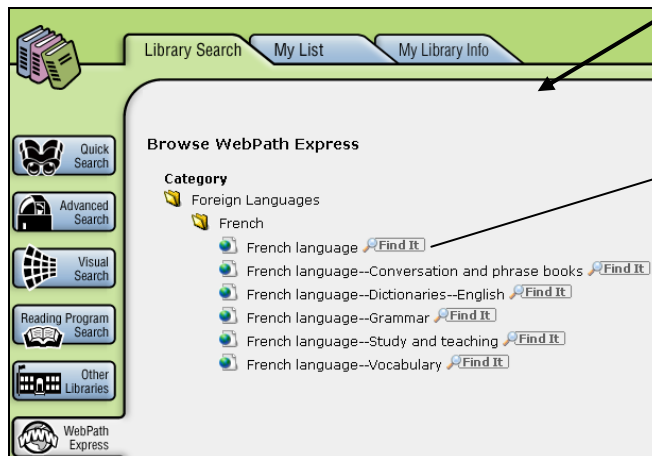
To display the WebPath Express Search page, access the Library Search tab and choose **WebPath Express Search**.

Initially, the WebPath Express Search page includes a list of categories. Start your search by clicking the category that most closely represents your area of interest. InfoCentre displays a list of subcategories. Focus your search by choosing the most relevant subcategory. Continue in this manner until InfoCentre displays a searchable category that interests you (Searchable categories have **Find It** buttons.) Then, initiate the search by clicking the adjacent **Find It** button.



Click a category.

Click a



Searchable category with Find it button.

After you click the **Find It** button, InfoCentre displays the Web Site results. Scan the Web Site Results for useful sites. When you find a site that looks interesting, you can access it from the Web Site results. Simply click its title.

For more detailed information about performing a WebPath Express search, see the patron search station Help topic *How to perform a WebPath Express Search*.

Search results enhancements

The search results pages now provide more information about titles and copies.

- The Show Copies page includes the due date for any copies that are on loan.
- Subtitles are included on the Show Full, Show MARC, and Show Copies pages.
- InfoCentre highlights all occurrences of the search term on the Full Display page.

My List enhancements

InfoCentre version 3.0 includes several enhancements that make the My List feature more useful.

Printing My List

When printing lists, you can now choose among four different print formats. You can also specify additional text and a title for the list.

When you click **Print** from the My List page, the Print List window appears.

Print List - Microsoft Internet Explorer provided by EIT - Bringing L...

Specify a title for the list (optional).

Specify additional text to be printed immediately after the title (optional).

What format do you want to print the list using?

Bibliography
 Brief
 Full
 MARC

Print Cancel

Enter a title (optional). InfoCentre prints the title at the top of

Enter additional text (optional). InfoCentre prints this text immediately after the title.

Choose a print format.

For information about the different print format, see the Search Station Help topic *About My List print formats*.



You can use the My List Print Layouts options on the Miscellaneous Settings screen (searching) to control exactly which print formats are available. For more information, see the InfoCentre client Help topics *How to specify searching settings* and *About the Miscellaneous Settings screen (searching)*.

Other My List enhancements

- Clicking **Add All** from the Search Results adds all titles in the search results to My List, even if the search results include more than 100 titles.
- InfoCentre now prevents you from adding the same title to My List multiple times.

Windows Vista and InfoCentre clients

InfoCentre's client now supports Windows Vista computers.

If you upgrade an InfoCentre client workstation to the Windows Vista operating system, you must also update your InfoCentre client. To do this, uninstall the existing InfoCentre client. Then install the InfoCentre client. For help installing InfoCentre clients, refer to the InfoCentre Getting Started Guide.