



Bookworm

Media Catalog System

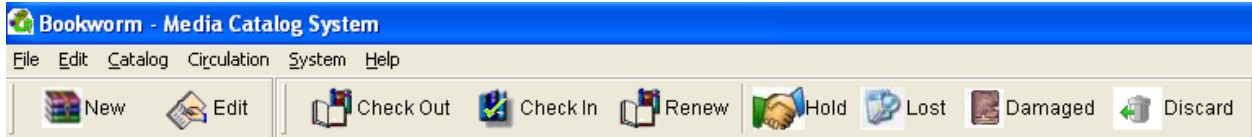
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GENERAL

MAIN MENU AND TOOLBAR



The menu and toolbar shown above are the primary means of navigation to the different tasks in the system. The most common tasks are available on the toolbar. All tasks are available on the menu. Each task is explained in more detail throughout this document.

LOGIN



The Bookworm application requires a user to specify credentials in order to gain full access to the application. Credentials are not required if the only access needed is to search the inventory of media. If this is the case, press the "Student Access" button to obtain search only capabilities to the application.

NOTE: Credentials are setup through the School Administration System.

CATALOG

ENTER NEW MEDIA

The screenshot shows a window titled "New Media" with a light green background. The form is organized into several sections:

- Top Section:** Accession # (text box with '0'), ISBN (text box with a search icon), Location (dropdown menu with 'Library'), Call Number (text box), Binding (dropdown menu), Media (dropdown menu with 'Book').
- Second Section:** Series (text box), Book Number (text box), Reading Level (spin box with '0.0'), Title (text box), Interest Level (spin box with '0.0'), Author (two text boxes), A/R Book, A/R Test, A/R Points (spin box with '0.0').
- Third Section:** Subject (text box), Description (text area with a blue link), Genre (text box).
- Fourth Section:** Purchase Location (dropdown menu), Date (dropdown menu with ' / /'), Price (text box with '\$ 0.00'), Notes (text area with a blue link).
- Fifth Section:** Medal Winner (dropdown menu), Review Source (dropdown menu), Priority (dropdown menu), Proved.

At the bottom right, there are four buttons: "New", "Copy", "Save", and "Close".

The catalog of books and other media contained within the library can be entered into the application through the *New* option on the *Catalog* menu, or by pressing the *New* button on the toolbar. The following information can be collected about each media item.

Accession Number	A unique number for each media item. See Using Accession Numbers for more information. The Accession Number is always required.
ISBN	ISBN number found on the book. The ISBN number is required if online retrieval is used.
Location	This is always a value of "Library" in this version. Future versions may support other locations
Call Number	Call Number of the book
Binding	Type of binding; paperback, hardback, etc.
Media	Type of media; book, DVD, newspaper, magazine, etc.
Series	The series of the book, such as "Harry Potter", "Dr Seuss", etc.
Book Number	The book number as specified within the series
Title	Title of the book or media
Author	Name of author. Up to 4 authors can be specified.

	NOTE: It is recommended entering the author in <i>LastName, Firstname</i> format.
Reading Level	Grade level in which the media is targeted.
Interest Level	Estimated age range of student which may be interested in contents of media.
AR Book	Is this book an Accelerated Reader Book?
AR Points	If it is an AR Book, how many points is it worth
AR Test	Does the library currently have the AR Test for this book?
Subject	Helpful for search for different types of books. The subject is a generic term that can be determined by the library.
Description	Description of book, often times this is the description from the back cover of book or the copyright page. Description can also be retrieved online.
Genre	Genre of book; such as Religious, Fiction, etc. This is provided to allow searching for groups of media. Genres can be determined by library.
Purchase Location	The location the media was purchased
Purchase Date	Date of purchase
Purchase Price	Cost of media
Notes	Free form field. Any information can be entered.
Medal Winner	If the book is a Medal Winner, specifies the source.
Proofed	Has media been proofed? See Online Retrieval
Review Source	Where this media was reviewed
Priority	Priority of media to obtain.

SEARCH/EDIT MEDIA

To search an edit media select the *Catalog | Edit* menu option or select *Edit* from the toolbar. The search/edit is comprised of three screens, each described below...

The screenshot shows a window titled "Search Media" with a search interface. The fields are organized as follows:

- Accession #**: A text input field with the value "0".
- ISBN**: A text input field.
- Series**: A dropdown menu set to "contains" followed by a text input field.
- Title**: A dropdown menu set to "contains" followed by a text input field.
- Author**: A dropdown menu set to "contains" followed by a text input field.
- Call Number**: A text input field.
- Reading Level**: Two spinners for "From" and "To", both set to 0.0.
- Interest Level**: Two spinners for "From" and "To", both set to 0.0.
- A/R Points**: Two spinners for "From" and "To", both set to 0.0.
- Include**: A dropdown menu set to "All Books".
- Media**: A list box containing "Book", "Music", and "Movie".
- Location**: A list box containing "Library".
- Medal Winner**: A list box containing "Aldecott", "NewBerry", and "William Allen".
- Subject**: A text input field.
- Genre**: A text input field.
- Sort By**: A dropdown menu set to "Series".

At the bottom right, there are "Search" and "Close" buttons.

The first screen is the Search screen. This provides a wide variety of ways to search for media. The search is an inclusive search, which means that all values specified will be included in the search. For example, if values of 3.5 and 6.0 are entered into the Reading Level AND a value of "Fiction" is entered into the Genre then the search will find all media that has a Reading Level between 3.5 and 6.0 AND a Genre of "Fiction". The only exception to this is the Accession Number; if this is specified then all other search criteria are ignored. The order of the media can also be specified using the *Sort By* drop down. Once the criteria is specified press ENTER or the *Search* button and the search will take place. If only one media is found in the search, the *Edit* screen is displayed; otherwise the *List* screen will appear.

The screenshot shows a window titled "Search Media" with a menu bar containing "Search", "List", and "Edit". Below the menu is a table with the following data:


Accession	ISBN	Title	Author	Current Status
0	0-15-200660-5	ABC Americana from the National Gallery of Art	Rubin, Cynthia Elyce	
11724	0-439-40547-5	Angel On the Square	Whelan, Gloria	Lost
31987	0-590-07451-2	Are There Spooks in the Dark?	Fregosi, Claudia	
11252	0-385-74618-0	Baby Gets the Zapper	DeWan, Ted	
12263	0-670-81109-2	Bunnies and Their Sports	Carlson, Nancy L.	
0	0-06-028049-2	The Danny and the Dinosaur Treasury	Hoff, Syd	Checked Out
22428	0-8172-4623-1	Digger The Story of a Mole in the Fall	Potter, Tessa	
12356	0-8164-3180-9	The Dream of the Little Elephant	Bornstein, Ruth	
0	15012-52301	Friendship Saves the Day	Ravin, Karen	
0	1-56282-535-6	the Grasshopper and the Ants	Brown, Margaret Wise	
0	0-316-15304-4	Just the Thing for Geraldine	Conford, Ellen	
22331		Lady and the Tramp	Walt Disney	
0	0-394-84955-8	Lady and the Tramp	Disney, Walt	
0		Lady and the Tramp	Walt Disney	
0	0-394-84955-8	Lady and the Tramp	Disney, Walt	
0	780590-566438	The Lamb and the Butterfly	Sundgaard, Arnold	
0	1-885222-97-1	The Lion King The Pal Partol	Walt Disney	
12376	0394-90033-2	Little Black Goes to the Circus	Farley, Walter	
10277	089577-426-7	Little Puppy Saves the Day	Pepin, Muriel	
0	0-8249-8077-8	The Littlest Angel Meets the Newest Angel	Kidd, Ronald	
0	0-8062-4842-4	Liza and Mother "Rug" Bear	Sappenfield, John R.	

At the bottom right of the window are two buttons: "Select" and "Close".

The List screen contains summary information about the media. The media that is highlighted may be selected by pressing ENTER or the *Select* button (you can also double-click on any line to select that media). This will take the screen to the *Edit* screen for that particular media. To return to the Search screen select the *Search* hyperlink at the top of the screen.

NOTE: If the current status is blank this indicates the media is currently in the library.

The Edit screen contains the detail information about the media. The *Proofed* check box should be checked once all the information for the displayed media has been reviewed. The *Description* and *Notes* can be [expanded](#) by clicking the left mouse button on the Description label (shown as a hyperlink). The Description provides information about the contents of the media. For example, if the media is a book, often times the information from the back cover of the book will be entered here. This information is shown to students when only *Student Access* is granted. The Notes field is a free form text used by the Librarian to specify anything about the book deemed important to the Librarian. This value will not be seen when only *Student Access* is granted.

Also notice the internet can be searched using the  button to the right of the ISBN value to provide title, author and description information (see [Online Retrieval](#)).



The left and right navigation buttons will move forward and back through the list of media based on the selection criteria. These buttons are disabled when only one media is found. Information is automatically saved when using these navigation buttons so there is no need to explicitly save any changed information.

To navigate back to the List screen press the List hyperlink at the top of the screen.

ONLINE RETRIEVAL

Entering media information into the application is a time consuming process. The application has the capability of searching the internet for three of the stored values; title, author and description. Since the description takes a large portion of the data-entry time this feature should help cut down on the data entry time significantly.

Note: The administrator or technical support staff will need to turn this capability on before it can be used.

The Internet Search feature uses the ISBN Number to search the internet for the book information. Therefore the ISBN Number is required before the search will take place.

One method of searching the book information is during the data entry of the book. To search using this method select the button to the right of the ISBN Number after the ISBN Number is entered



Depending on the speed of your internet connection it could take anywhere from five to thirty seconds to search each book. Because of this, a better method for searching is through the *Online Retrieval* batch process. To access the batch process, first enter the Accession Number and ISBN Number using the Data Entry process (see [Enter New Media](#)). Other information may be entered but the Accession Number and ISBN Number are the only required pieces of information.

Note: If you wish for the online retrieval process to retrieve the title, author and description, do not enter this information. The online retrieval process will not override any information entered manually.

After entering as many books as desired, select the *Online Retrieval* process from the *Catalog* menu (see Figure 1). The screen that is displayed will show the number of books that are ready to be searched. Press the *Execute* button to begin the online retrieval process.

Note: The application uses a service called ISBNdb for its online searching. This service allows 500 searches a day at no cost. If you require the capability to search for more than 500 books a day please contact your Administrator.

Although the batch process will fill out the title, author and description, it may not always properly format the information. Therefore it is recommended that the information be proofed after the process is complete. To do this go to the *Catalog Edit* screen, enter "Not Proofed" from the *Include* drop down and press *Search*. This will give you a list of all books that have been processed online but not yet reviewed. Select any record in the list to go to the detail screen. You can quickly navigate from one record to another using the

navigation buttons. Information is automatically saved when using the navigation buttons so there is no need to select the Save button.

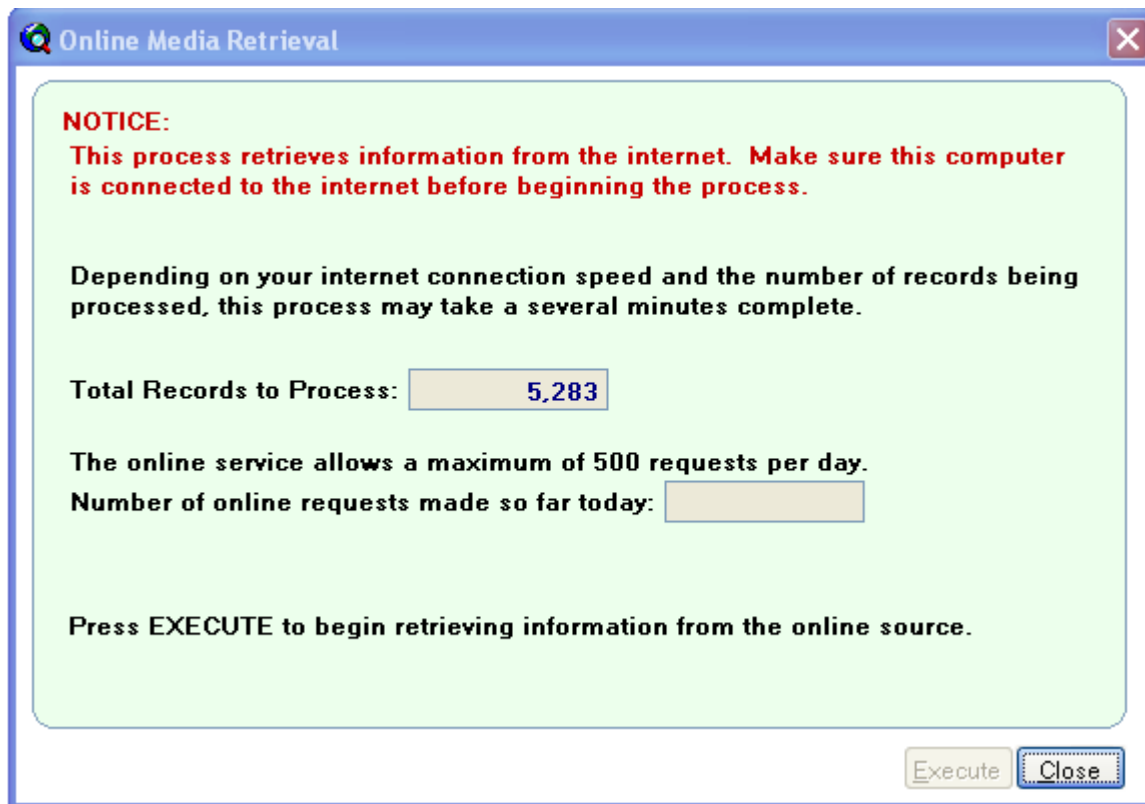


FIGURE 1

CIRCULATION

This section describes the means to track the circulation of media. Most screens within the Circulation module require the selection of the student, the media or both. The containers used to select students and media are the same for most screens within the Circulation module therefore they are described here.

STUDENT SELECTION

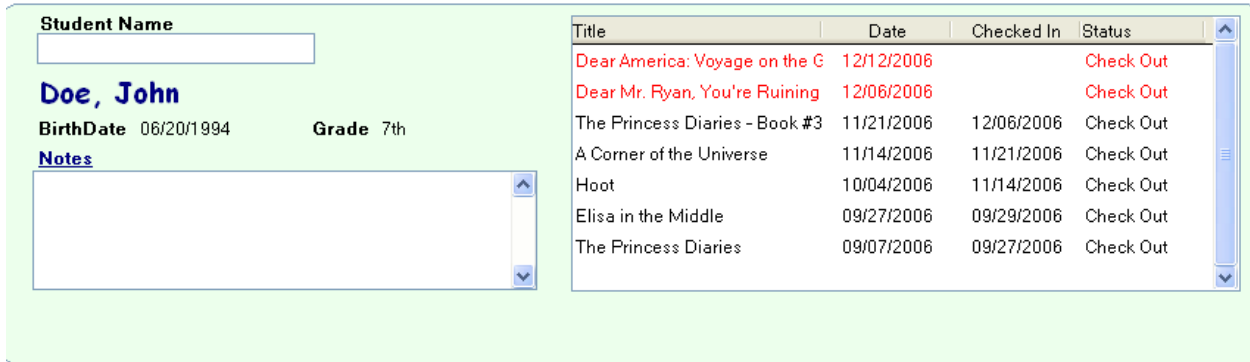


FIGURE 2

See the [Student Selection Control](#) section for information on how to select a student. In addition to the selection of the student, this section displays the Birth Date and Grade Level of the student to help verify the selected student is the correct student. The Notes field provides a way for the user to enter special notes about the student. These notes will appear anytime this student is selected throughout the application. The right hand side displays the historical information of the media for the student. It shows what media has been checked out in the past and what is currently checked out. It also shows what media is being held for the student, and anytime a media is lost or damaged by the student. Any information in red indicates the media is still recorded in the system as checked out.

MEDIA SELECTION

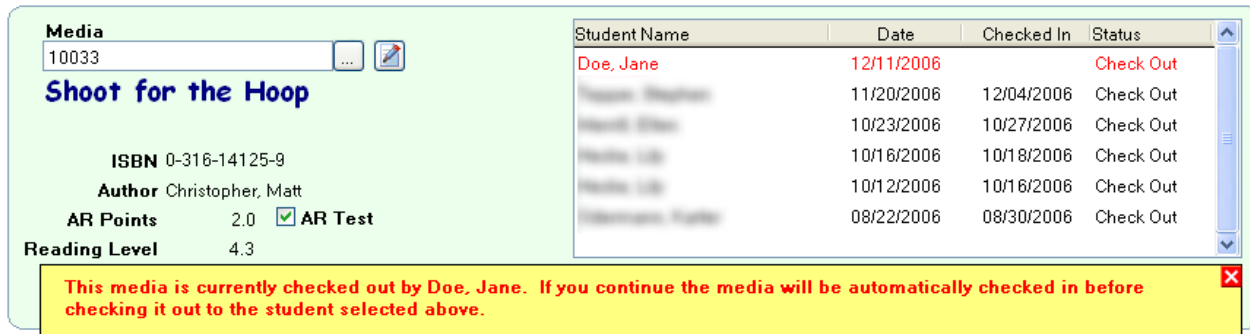


FIGURE 3

See the [Media Selection Control](#) section for information on how to select media. In addition to the selection of the media, this section displays the ISBN Number and Author to help identify the media as the correct one. Also the AR Points, AR Test and Reading Level are displayed for the librarian to assure the student is checking out books suitable for them. The right hand side displays the historical information of the students who have checked out this media or have this media on hold. Any information in red indicates the media is still recorded in the system as checked out.

INFORMATIONAL MESSAGES

On occasion a yellow “message” box will appear below the student or media section. (See [Figure 3](#) for an example). The messages indicate the system has recognized something unusual. In the example in [Figure 3](#) the selected media is shown to be currently checked out by another student. This means either the incorrect media was selected or the media was not recorded into the system when it was checked in. These messages will sometimes prevent you from continuing until another action is taken. Other times, as in the case in the example, the application will automatically execute a default action if the current process is continued. In the example in [Figure 3](#) if the media is checked out to John Doe the application will automatically mark the media as checked in for Jane Doe.

Check Out

Use this feature to track the media that is checked out by students. Both the student name and the media are required. The upper section is the [Student Selection](#). The middle section is the [Media Selection](#). The lower section contains the Check Out and Due Dates. By default the Check Out date is the current date and the Due Date is seven days from the check out date. These values can be changed when necessary. See the [Date Control](#) for more information about how to enter dates.

CHECK IN

Use this feature when the media is returned to the library. This not only pertains to media that is checked out of the library, but also media that is lost or damaged. If media is lost and later found, use the Check In feature to record that it is returned to the library. If the media is damaged and then repaired, use the Check In feature to record it as returned to the library. When checking in media, only the media or the student needs to be entered. Choose which piece of information to enter by selecting either the “By Media” or “By Student” hyperlink at the top of the page.

[Figure 4](#) shows an example of the screen when “By Media” is selected. Once the media is entered the student information will automatically be displayed in the lower half of the screen. The check in date defaults to the current date but this can be changed.

[Figure 5](#) shows an example of the screen when “By Student” is selected. Because Jane Doe has two books checked out, the lower half of the screen displays a list. Using the checkbox on the far left of the list, select all media being checked in. If only one media is checked out to the specified student, the lower half of the screen will show the one media in a more detail view instead of showing the media in a list.

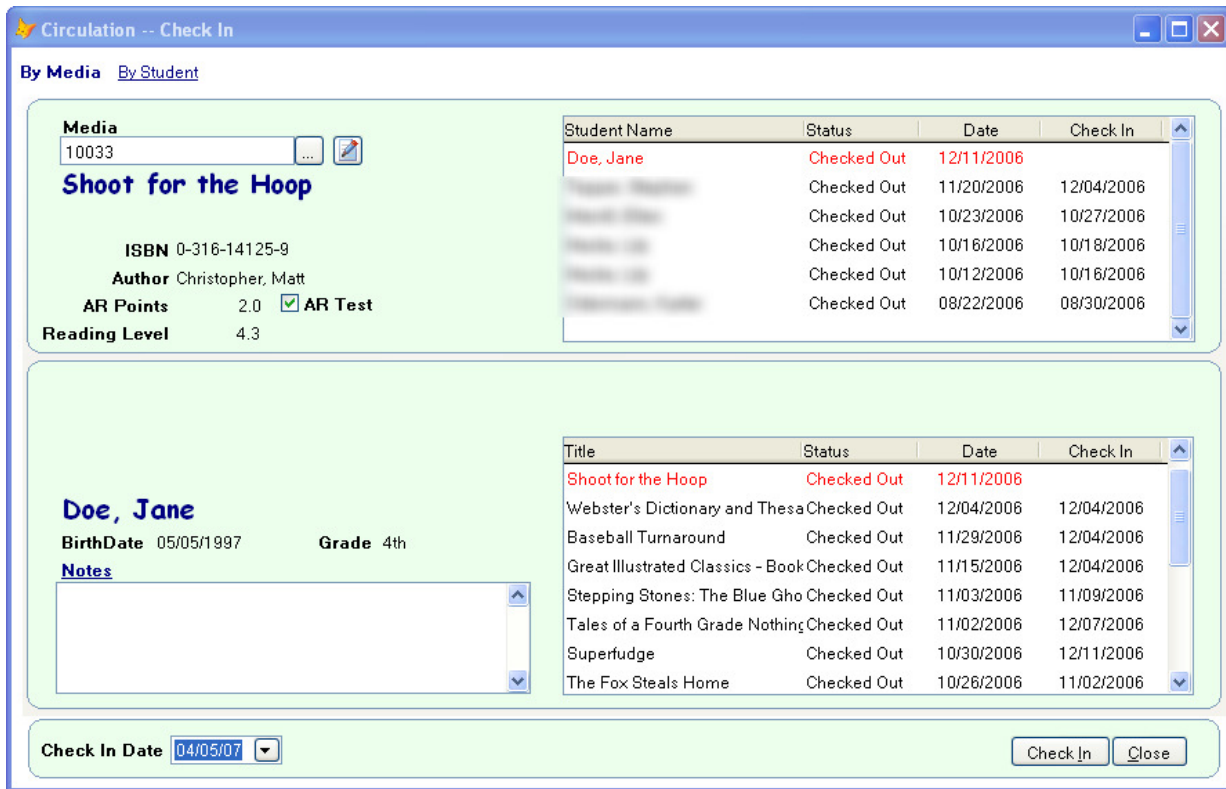


FIGURE 4

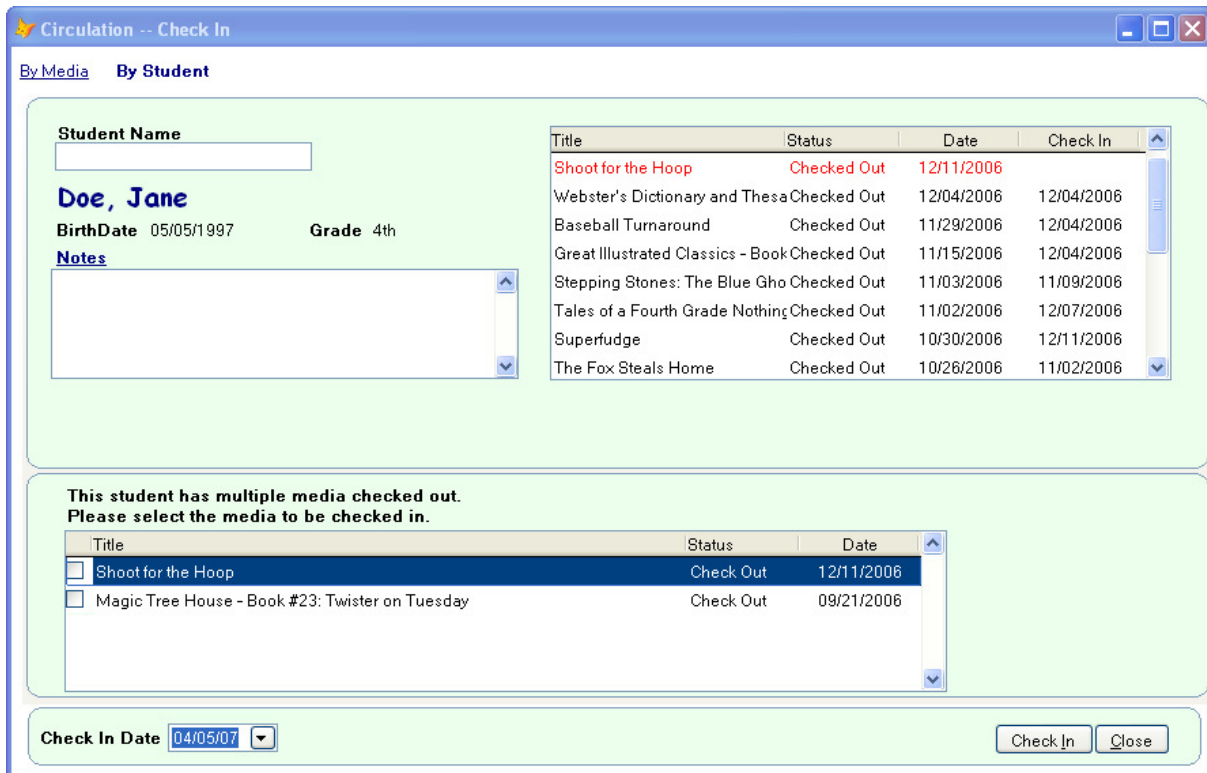


FIGURE 5

RENEW

Use this feature to extend the time period the current student has the media checked out. Like the check in feature, only the media OR the student needs to be specified to find the circulation information.

Note: Media may also be renewed by using the Check Out feature. This method requires more steps and time because it requires you to specify the media and the student but nevertheless is can be used if you prefer staying on the Check Out screen.

HOLD

Use this feature to reserve media for a student when the media is currently not available to be checked out. Both the student and media information needs to be specified to place media on hold. At the bottom of the screen enter the release date, which is the date the media is automatically released from hold status if not checked out by that date. The release date defaults to seven days from the due date. Media can be place on hold multiple times. When media is placed on hold multiple times, the default release date is seven days from the previously held release date.

LOST

Use this feature to record media as being lost. The selection of media is required but the student is optional. If the name of the student who lost the media is known, it is recommended to record that information; but it is not required. If a media is later found, it can recorded as returned to the library by using the Check In feature.

DAMAGED

Use this feature to record media that has been damaged. As with Lost, the selection of the media is required but the student is optional. If the name of the student who damaged the book is known, it is recommended to record that information. Once the media is repaired it can recorded as returned to library by using the Check In feature.

DISCARD

Use this feature to record media being discarded. Media can be discarded for a number of reasons, such as being too damaged to repair or media that contains material regarded as inappropriate. The reason is recommended but not required.

Circulation -- Discard

Please select the media you wish to discard

Media [input field] [dropdown] [pencil icon]

Title

ISBN

Author

AR Points AR Test

Reading Level

Student Name	Status	Date
--------------	--------	------

Please describe the reason you are discarding this media

Reason

[text area]

Discard Close

FIGURE 6

MAINTENANCE

The Maintenance feature provides a way to fix any errors that may have occurred using any of the above circulation features. It gives full access to all the circulation information and allows modification of any data, including the ability to delete it. The screen is organized differently than all the other screens in the Circulation module but the information is the same.

Here are some common scenarios where the Maintenance feature will be used...

- *Media is checked out using the incorrect check out date.* To correct this error, select the media using the [Media Selection Control](#) and then enter the correct date in the lower right hand corner of screen.
- *Media is checked out to the wrong student.* To correct this error, select the media using the [Media Selection Control](#) and then enter the correct student using the [Student Selection Control](#) (see figure 7).
- *The wrong media is checked out to a student.* To correct this error, go to the "By Student" screen and select the student using the [Student Selection Control](#) and then enter the correct media using the [Media Selection Control](#) (see figure 8).

Because the Maintenance feature should be rarely used, it is not available on the toolbar. The Maintenance feature is available from the *Circulation* menu.

Circulation Maintenance

By Media [By Student](#)

ISBN **AR Points** AR Test
Author **Reading Level**

Student Name	Status	Date	Check In

Change Student

BirthDate **Grade**

Notes

Checkout Date
Due Date
Checkin Date

FIGURE 7

Circulation Maintenance

By Media **By Student**

BirthDate Grade

Notes

Accession #	Title	Status	Date	Check In

Change Title [input] [button] [icon] [Delete]

ISBN Author AR Points Reading Level

AR Test

Checkout Date // [dropdown]
 Due Date // [dropdown]
 Checkin Date // [dropdown]

Save Close

FIGURE 8

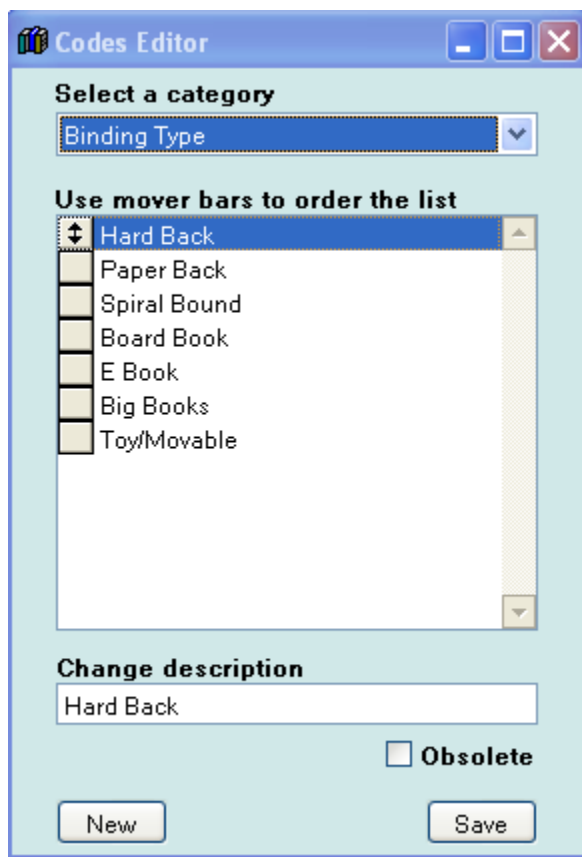
System

CODES EDITOR

Most of the drop down lists contained within the Catalog information can be modified. New items can be added to the list; existing items can be changed or reordered. This can all be done using the Codes Editor accessed through the *System* menu. To modify information, first select from the category of items at the top of the screen. The list of current items for that category will then be displayed.

Select the New button to add a new item to the list. A new item is added to the bottom of the list with a blank description. Type the new description in the "Change description" box. Press the TAB key for the changes to be reflected in the list.

Note: The order of the list can be changed by dragging¹ the button on the left of the item in the list.



To modify an existing item simply highlight the item in the list and change the value in the "Change description" box.

Items cannot be removed from the list but they can be marked as obsolete. By marking the item obsolete, the item will no longer show up in the dropdown list unless the item has already been specified for the media currently being viewed.

Once the necessary changes have been made select the Save button to make the changes permanent.

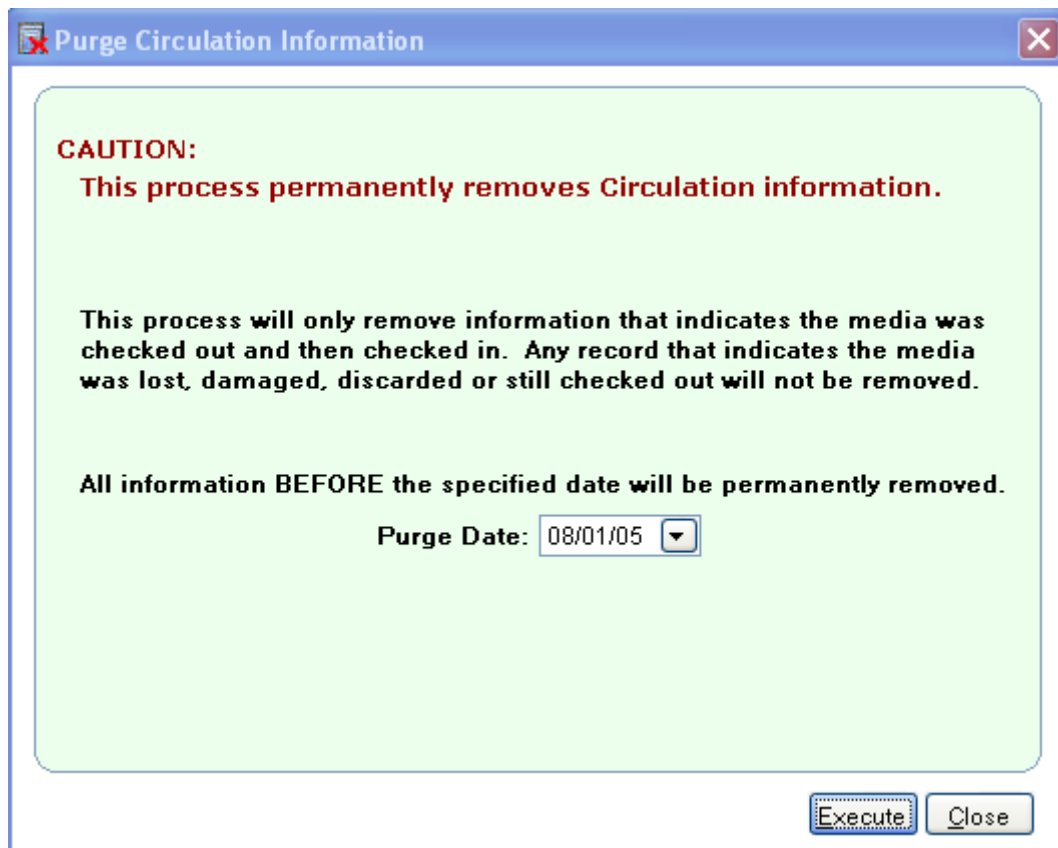
FIGURE 9

¹ Press the left mouse button and hold it down while moving the mouse up and down.

PURGE CIRCULATION HISTORY

As the application is used over the years the historical information becomes less important. This module will remove circulation historical information that occurred before the Purge Date.

Note: This information is permanently deleted. Please be sure not to enter a current date.



CAUTION:
This process permanently removes Circulation information.

This process will only remove information that indicates the media was checked out and then checked in. Any record that indicates the media was lost, damaged, discarded or still checked out will not be removed.

All information BEFORE the specified date will be permanently removed.

Purge Date: 08/01/05

Execute Close

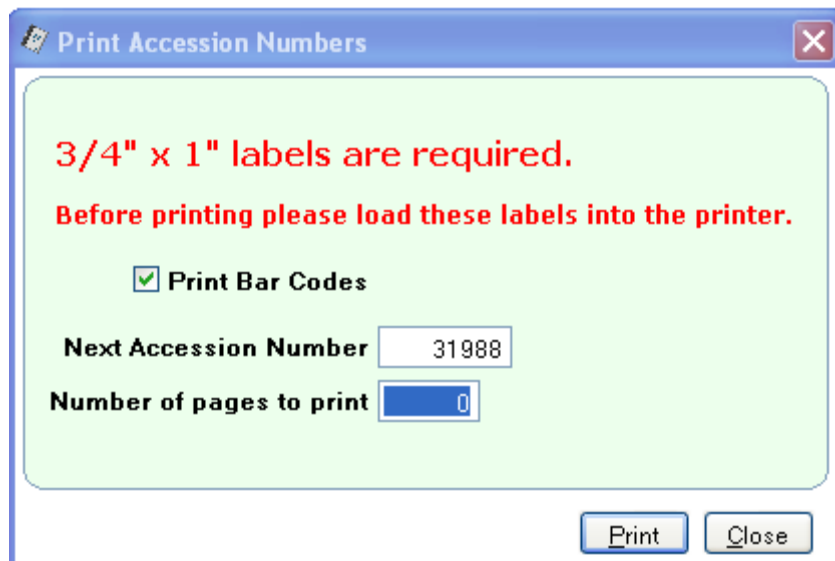
Accession Number

USING ACCESSION NUMBERS

Accession Numbers provide a way to easily identify media entered in the application. The Accession Number is required when adding new media in the application. The following is the recommended method of assigning accession numbers to media.

- Pre-print a list of accession numbers using the [Print Accession Numbers](#) feature.
- Have a sheet of these pre-printed numbers at hand when entering the media into the application.
- Just before entering the media into the application attach an accession number to it. Select a location that is easily accessible since this will be the most often used means of identifying the media. For books, a convenient location is on the top right-hand corner of the first page (open the cover).
- Now that the accession number is attached to the media you can start entering the information into the application, starting with this accession number. A barcode scanner can be used to enter the accession number throughout the application.

PRINTING ACCESSION NUMBERS



Accession Numbers can be printed from the *Print Accession Numbers* feature under *System* menu. To print accession numbers you will need $\frac{3}{4}$ " x 1" labels (there are 7 labels in one row and 14 rows of labels on an 8 $\frac{1}{2}$ x 11" sheet of paper). If you have a bar code scanner or plan to use a bar code scanner in the future then check the *Print Bar Codes* option. You can then specify the Next Accession Number to print. This should be one number larger than the last accession number printed previously. Accession Numbers that have already been entered into the application will not be printed. For example, if you specify the Next Accession Number of 15032 but accession numbers of 15034 and 15036 are already

assigned to a book entered into the application, these numbers will be skipped when printing the accession numbers.

SPECIAL NOTE: The application is only able to identify accession numbers that have been entered into the application. If you have printed accession numbers but have not recorded them in the application, they will print again if requested.

The last item to specify is the number of sheets you wish to print. Once this is entered the number of actual labels that will print is shown to the right of this value (there are 98 labels per sheet).

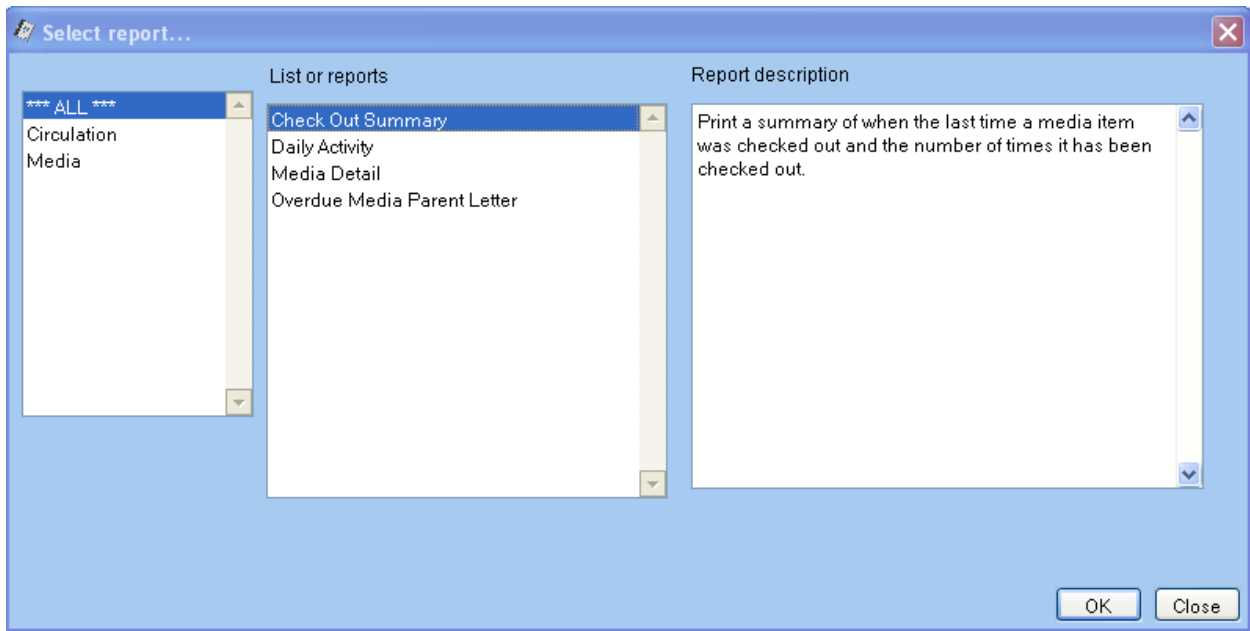
Once you have specified all the necessary values and have placed the labels into the printer press the *Print* button and the labels will print.

REPORTS

There are several reports in the application. These reports can be accessed from the *File* menu.

The far left hand list provides a way to filter the reports. The middle list contains the list of available reports, and the right hand view provides a description for each report. The description is shown for the highlighted report.

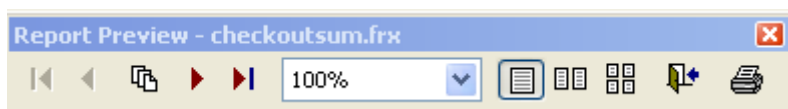
Before any report is printed a dialog screen appears which allows additional options to be selected for the selected report.



Each report can be printed immediately or previewed on the screen.

Print Preview

This option is on the lower left hand side of each selection criteria screen.



When previewing a report an additional toolbar is displayed. The first five buttons provide a way to navigate the report. The drop down provides a way to zoom the report in and out. The next three buttons specify the number of pages to display at one time. The next button exits preview of the report. The last button prints the report. A Windows Print dialog will always display before printing so information about the printer can be specified.

SPECIAL CONTROLS

This section describes the controls used throughout the application. It is assumed the user is familiar with the Windows controls, therefore only the controls special to the application are described here.

STUDENT SELECTION CONTROL

Student Name
dd
Baddonner, John
Doe, Jane
Dolinee, Karrie
Dolittle, Harry
Doust, Mary
Hostettler, Don
Swudo, Jenny
Swudo, Dan

This control is the means of selecting students. You can search by student name or student ID. If a number is entered it is assumed to be a student ID. If alphanumeric characters are entered it is assumed to be a student name. As characters are typed, student names that match the value will show in a list below the value. The match can occur anywhere in the name. This gives great flexibility when searching; searching can take place by last name, first name, or anything in between. For example, if Kathy comes into the library but you are not sure if she spells her name with a "K" or a "C", you can type in "ath" and both spellings will appear in the list. The list will only appear when at least one, but no more than twenty names match the typed value. Highlight a row using the up and down arrow keys (or the mouse) and press the ENTER or TAB key to select a student.

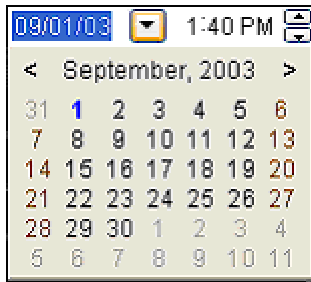
MEDIA SELECTION CONTROL

Media
<input type="text"/>

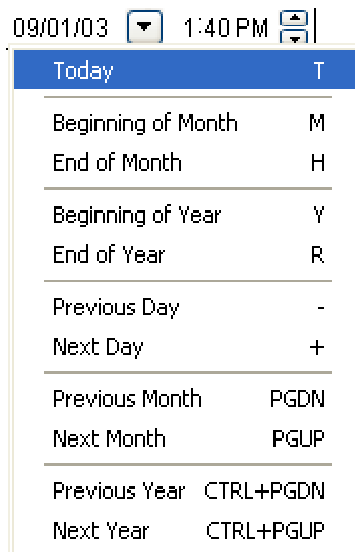
This control is the means of selecting media. You can search by Title or by Accession Number. If a number is entered it is assumed to be an Accession

Number and will select the correct media based on the entered value. If alphanumeric characters are entered it is assumed to be a Title (including the Series). If a value is entered which happens to uniquely identify the media then the media will be selected, otherwise a list of media matching the value will be displayed. The button on the far right of the control provides a way to quickly edit the selected media information.

DATE/TIME CONTROL



The calendar control is a robust control which gives the user the ability to easily enter a date and/or time. In some cases the date and time are both shown, in other cases only the date or the time are shown. But in all cases, the control works the same. The most obvious way to enter a value is to type the appropriate characters. There are many other alternatives to facilitate easy entry of a value. One way is to use the buttons on the control. The button just to the right of the date will drop down a calendar. The Less Than and Greater Than characters that are to the left and right of the month/year can be pressed to move backward and forward one month at a time. Click the left mouse button on the month/year to display a list of month/years. When a day is selected, the calendar disappears and the date value is changed. The up and down buttons to the right of the time value gives the ability to increment or decrement the time. These buttons only work when the cursor is positioned on one of the three time values (hour, minute, or meridian).



Another option on the date/time control is the quick-entry menu. Press the right mouse button to display this menu (date menu shown in figure on left). The date portion of the control displays a different menu than the time portion. An alternative to the menu for quick-entry is the hotkeys. The hotkeys are shown on the right-hand side of the popup menus. Learning the hotkeys will allow the quick-entry options to be used without using the menus. Some of the more popular hotkeys on the date are the *T*, + and - keys. Pressing *T* will change the date value to the current date. Pressing + or - will increment and decrement the date. The more popular hotkeys on the time are the *N*, + and - keys. Press *N* will change the time to the current time. Pressing the + or - will increment and decrement the current portion of the time.

EXPANDER CONTROL

Some information may have a large amount of information that needs to be entered. The Expander Control provides the capability to show a screen that displays a larger amount of data. The screen can be resized to show even more information. To show the "expanded" screen, click the left mouse button on the hyperlink next to the entry control. The figure below shows an example of a Notes control. When the left mouse button is pressed on the

“Notes” caption, a new screen is displayed providing a way to show more information at once. This screen can be resized. Each time the screen is displayed it will be set to the size from the previous time it was displayed.

