

Surpass/2 *User's Guide*

**A Reference Guide For Users of Compel's *Surpass/2*
Library Automation Software.**

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Introduction

Welcome to the wonders of library automation! Regardless of whether this is the first time you've put your fingers on a computer keyboard or if you're an old pro, this *Surpass/2 User's Guide* will help you get the most from your computer and the *Surpass/2* library automation software.

Don't be discouraged if you occasionally lose your way along the sometimes-bumpy road to library automation--everyone gets lost once in awhile. Use this manual as your guide and your map. The reward awaiting you at the journey's end is freedom from the more mundane chores of library management and the freedom to use your time and hard-earned knowledge where it counts--serving your patrons.

About This Manual

For the most part, the outline of this manual follows the outline of *Surpass/2* itself. Most of the main sections have the same names as the features on *Surpass/2*'s Main menu. The sections within each major section share the same names as the features on the lower menus. This allows you to easily find information on any part of *Surpass/2*.

If you're like most people, you're anxious to get started and feel you'll learn more about the software by actually *using* it. That's fine! You can get started by reading the first few pages of this manual to get *Surpass/2* installed on your computer and running. Then start exploring. You'll find that *Surpass/2* itself will offer you quite a bit of guidance. If you get lost or need more information on a part of *Surpass/2*, just refer back to this manual.

Certain type styles (fonts) and other conventions are used in this manual for added clarity. Here are some examples:

- When you are asked to press one of the special keys on your keyboard, the key's name is shown in a special font to distinguish it from words. Examples:

ESC ENTER PgUP F5 INSERT

- When you are asked to type words or commands, the part you type is underlined and monospaced (the letters and spaces are all the same size). This helps you see exactly what you should type and exactly where you should space between words. If you should press the ENTER key after typing, the ENTER symbol will be at the end of the text. Examples:

CD \SURPASS ENTER

SURPASS ENTER

- The first letter of menu names is always capitalized:

Inventory menu Patron menu

- When you must go through more than one menu to reach a feature, the menu names are separated with slashes. For example, the following tells you to go first to the Inventory menu and then select the Enter/Edit Items feature:

Inventory / Enter/Edit Items

Terms Used in This Manual

- Barcode** The computer-readable pattern of stripes used on labels for inventory items and on patron cards or labels.
- Barcode Number** The unique number assigned to each individual inventory item. Patrons also have unique barcode numbers, but these are usually referred to as patron numbers.
- Barcode Reader** The device that is used to "read" barcodes from inventory labels and patron cards. This is sometimes called a barcode wand.
- Selection Bar** The highlighted (usually blue on white) part of a menu or list that can be moved using the arrow keys.
- Current Selection** The menu or list item which is currently highlighted by the selection bar. If you press the ENTER key, the function associated with the current selection will be performed.
- Cursor** The underline or flashing block that shows where the next character will be entered when text is typed into the computer.
- Dialog Box** A special message from *Surpass/2* that appears in a window in the center of the screen. These boxes are used to bring something to your attention and/or to ask a "yes" or "no" question.

For example, when you ask *Surpass/2* to delete an item, *Surpass/2* will display a dialog box asking whether or not you want to delete the item.

Some dialog boxes do not ask questions. These just bring something to your attention such as a patron with overdue materials. After you have read the message, you can press any key (usually the SPACEBAR or the ENTER key) to continue.

Field An individual pieces of information within a record displayed on the screen or printed on a report.

The patron file, for example, includes fields for the patron's first and last name, their number and their address.

MARC records have fields that are numbered using a system devised by the Library of Congress. For example, the field that stores the main author's name is Field 100. MARC fields can also contain sub-fields that are given lowercase letters. Field 100, for example, has a subfield for storing the author's date of flourishing. This is Sub-field "c" of Field 100 (usually written as 100c). See the section, "Abort MARC" for more information on MARC fields.

The term, "field" is also used to describe any part of the screen in which you may enter information. Fields for entering information appear in magenta (violet) on your screen if you are using a color monitor. They appear as underlined areas if you are using a monochrome monitor.

File A collection of related records. All patron records, for example, are stored in the Patron File.

Index Just as books have indexes to help the reader find certain items within the book, *Surpass/2* files have indexes to help the computer find individual records. Indexes are used by *Surpass/2* when you are searching for a patron or inventory item.

MARC MACHine Readable Cataloging. A standard method designed by the Library of Congress for storing bibliographic records.

MARC Field A field within a MARC record. See "Field."

MARC fields are numbered with "tags" that describe the type of information contained in the field. For instance, MARC Field 245 contains title information; Field 010 contains the LC number.

MARC Record The bibliographic information for a single book or other inventory item. See "Record."

MARC Subfield..... A single, separate piece of information within a MARC field. For instance, MARC Field 100 contains information on the author. Subfield A of Field 100 (100a) contains the author's name and Subfield D (100d) contains the author's date of birth.

Menu A list of selections (also called "menu features" or "menu items") from which you choose.

MS-DOS The name of the operating system used on most IBM PC- and PS/2-compatible computers. IBM's brand name for MS-DOS is PC-DOS and these two terms can be used interchangeably.

The operating system is a program that is automatically loaded from your hard disk (or floppy disk) when you turn your computer on. All programs, including *Surpass/2*, are run by giving commands to MS-DOS.

Pack The process of permanently removing deleted records from files and, thus, making more disk space available for other files and records.

When a record is deleted (removing a patron, for example), the space used by the deleted record is not immediately made available for other uses. When you add a record, the space used for any deleted records are used at that time. If, however, you delete a large number of records (patrons, inventory items, etc.), the amount of space used by these deleted records can become significant. Using the "Pack" feature of the Maintenance menu's "File Maintenance" screen will "pack" these files, removing all the "dead air" and making more space available on your computer's disk drive for other records, programs or files.

PC-DOS See "MS-DOS."

Pull-Down Menu..... A vertical menu that appears to pull down from the horizontal menu at the top of the screen.

Purge..... The term used when many records are to be deleted in one operation.

Record..... A collection of fields describing a single item stored in a file on your computer's disk.

Computer records are similar to file cards and folders in a manual filing system. For example, the individual fields making up the information about one patron (number, name, address, etc.) are stored in a single record. Each patron has one record in the Patron File.

Reindex To re-build one of *Surpass/2's* file indexes. (See "Index.")

A power failure, turning off or resetting the computer before exiting, or another mishap can cause an index to become corrupted or out of order. This is rare, but you can suspect a bad index is to blame if you cannot find a patron or an inventory item that you are sure is on file in your computer.

Reindexing will correct this problem. (See the Maintenance menu's "File Maintenance" function, Page 221, for information on how to reindex files.)

Selection List..... A displayed list from which you make selections. This could, for example, be a list of titles or a list of patron names.

Selection lists behave just like menus: you use the arrow keys to highlight an item and press the ENTER key to select the highlighted item.

Window Any area of the screen where information is displayed. The window disappears when it is no longer needed. The form used to display and edit patron information, for example, is shown in the Patron Information Window.

Learning About MARC Records

"MARC" stands for MACHine Readable Cataloging and is a standard system for storing bibliographic records using computers. It was designed by the Library of Congress to provide a simple, standard method for representing bibliographic information and to make it easy to move this information from one computer to another.

Before MARC, there was no standard method for storing bibliographic information on computers. It was up to the designer of each computer program to create a system. Each system was different and incompatible with the others making it very difficult to move information from one system to another.

Each MARC record contains all the bibliographic information for a single edition of a single title.

Parts of a MARC Record

MARC records contain a number of "fields." Each field contains a single part of the bibliographic record. For example, the title information is contained in one field; the author, edition, call number and subject headings are stored in other fields.

Each MARC field has a number, called a "tag," that defines the type of information stored in the field. Most of the tags from 001 through 899 have been defined by the Library of Congress to contain specific information. The fields tags from 900 to 999 are not standardized and may be defined by the vendor of MARC records (although some general standards have arisen).

Some common MARC field tags are:

010 Contains the Library of Congress cataloging number (LCCN).

020 Contains the International Standard Book Number (ISBN).

- 100Contains the author's name and related information (date of flourishing, titles, etc.) This is called the "personal name main entry."
- 245Contains title including the statement of responsibility.
- 300Contains the physical description (number of pages, dimensions, etc.)
- 520Contains the annotation.
- 650Contains the topical subject heading.
- 900Contains the local call number.
- 901Contains the barcode number.

Surpass/2 contains a database of these and many other common MARC field tags. The Library of Congress publishes a document containing descriptions of all standard MARC fields. This document, *MARC Formats for Bibliographic Data*, may be obtained directly from the Library of Congress' Cataloging Distribution Service, Washington, DC 20541.

In time, you will begin to memorize many of these MARC field tags, but you don't have to do use *Surpass/2*. At any point in *Surpass/2* where you are asked for a MARC field tag, you may press a key to display a list on the screen.

A Sample MARC Record

Let's take a look at a sample MARC record (this sample does not contain all the information that would normally appear in a full MARC record):

Tag	Ind	S	Contents
100	10	a	Roberts, Willo Davis.
245	10	a	Baby-sitting is a dangerous job /
260	0	a	New York:
		b	Atheneum,
		c	1985.
300		a	161 p. ;
		c	22 cm.
650	1	a	Baby sitters
		x	Fiction.
650	0	a	Children's stories, American.
650	1	a	Kidnapping
		x	Fiction.
900		a	F ROB
901		a	1018

There are four columns in the above MARC record: "Tag," "Ind" (indicator), "S" (subtag) and "Contents."

The Tag column contains the tag number of the field. Fields can be numbered from "001" to "999."

The Indicator column contains up to two digits that describe the information in the field. The meaning of the indicator digits are different for each field. For example, the second indicator digit of the Topical Subject field (650) tells which source was used for the subject heading (Library of Congress, Sears, etc.). For the most part, indicators are handled automatically by *Surpass/2* when you are adding new books.

The Subfield column contains a number or letter which breaks down the field into one or more smaller, more-specific fields. For instance, the Physical Description field (300) above has two subfields: 300a and 300c. 300a Contains the number of pages (161 p.) and 300c contains the physical dimensions of the book (22 cm).

The Contents column shows the information stored in each field and subfield.

When you see a MARC field displayed in *Surpass/2*, you will see some additional information to help you know what each field tag number and subfield means. You cannot possibly be expected to memorize all the possible field tag numbers and subfields, so *Surpass/2* displays short descriptions next to each field and subfield. For example, the above MARC record's 300 field would be displayed as follows:

Phys Desc 300 a(Pages): 161 p. ;
c(Dimsn): 22 cm.

You might have noticed the semicolon after the number of pages and the other, odd-looking, punctuation used throughout the MARC record. This is the standard punctuation defined by AACR2 (Anglo-American Cataloging Rules II). This punctuation does not have any special meaning to *Surpass/2* other than to print proper punctuation on catalog cards and on the screen.

Any bibliographic information that you import into *Surpass/2* from the Library of Congress' MARC database will normally contain proper AACR2 punctuation. Sources of LC MARC records include most book publishers and jobbers and retrospective conversion services.

This section has presented a short introduction to MARC records. Perhaps this is all you need (or want) to know. If not, there are many marvelous publications on MARC cataloging, probably available in your local public library. A good place to start is with the "Bible" of MARC, *MARC Formats for Bibliographic Data*, available directly from the Library of Congress.



Before You Begin

You are probably anxious to get your hands on the keyboard to see what marvelous things the computer can do for you. That's OK for exploration and learning, but if you want the computer to be able to do those marvelous things, you will first want to get your library ready for the computer and to put some thought into how you would like the computer to work for you. Organize, *then* computerize!

Organize

There will never be a better time to organize and weed your collection than before you automate your library. This includes:

- ***Inventory***
Do a thorough physical inventory of all materials you plan to catalog with the computer.
- ***Weed***
Get rid of materials that are either out of date or are never used. You won't want to waste time (and money) cataloging these books on the computer.
- ***Shelf List***
If you'll be using a retrospective conversion service, such as that offered by Compel, or you will be manually entering books from your shelf list, make sure it is up-to-date.

If you'll be manually cataloging books from your shelf list cards, you'll want to make sure that the cards include as much cataloging information as possible--including subject headings. If your shelf list is hopelessly incomplete, you might want to consider entering the cataloging information directly from the books.

If you'll be using the retrospective conversion services of Compel or another company, it will greatly help if your shelf list cards contain LC numbers and/or ISBN numbers. This will help the service to quickly locate the MARC bibliographic records and to make sure that the records you get match the editions of the books you have in your collection.

Style Manual

If you will be manually cataloging your collection, you will want consistency in the way the bibliographic information is entered into the computer. To make this easier, you will want to create a style manual for those who will be entering the data and for your own reference.

You will not have to be concerned with a style manual if you are using a retrospective conversion service. The bibliographic information you get from the service will automatically follow the AACR2 cataloging rules.

Areas to be considered when developing a style manual include:

1. Whether or not cataloging information such as **titles, subject headings** and/or **author names** will be in all uppercase or in upper- and lowercase.

According to AACR2 rules, only the first letter of the title and the first letter of proper nouns should be capitalized. In subject headings, only the first letter of each division of the subject and of proper nouns should be capitalized.

2. Standardize **subject headings**. *Surpass/2* is very sensitive to the way subject headings are entered. A change as small as a single character will cause *Surpass/2* to view two seemingly identical subject headings as different and will catalog them accordingly.

To prevent this, you should standardize using a subject heading authority such as Sears, Library of Congress or one of your own design.

3. Standardize fund names or abbreviated **fund codes**. For each individual item stored in your computer, *Surpass/2* can track the source of the funding used to purchase the item. This allows you to print reports of how you used funds from different sources.

To group items by funding source, *Surpass/2* uses a "fund code" which can be up to ten characters long. You will want to use the same exact code for each individual source. Examples: "CHAPT II," "PTA," "PTO," etc.

4. Standardize vendor names or abbreviated **vendor codes**. For each individual item stored in your computer, *Surpass/2* can keep track of the vendor from which the item was purchased. This allows you to print reports of the items purchased from an individual vendor.

To group items by vendor, *Surpass/2* uses a "vendor code" which can be up to five characters long. You will want to use the same exact code for each individual vendor. Examples: "BTSB," "CHILDRENS," "FOLLETT," etc.

5. Standardize circulation **category codes**. Each title in *Surpass/2* can have a category code. These codes determine the number of days different types of materials may (or may not) be loaned, to whom they may be loaned, their daily fine rate, the length of the grace period (if any) and the number of times they can be renewed (if at all).

You should carefully decide on unique category codes for each category in your collection that you wish to group together or to circulate using the same number of days, fines, etc. Here are some examples of common category codes:

PBACK Paperback book
HBACK..... Hardback book
VERT Vertical file
REF Reference
BIB..... Biography
PROF..... Professional collection
FS..... Filmstrip
VHS..... VHS video tape
LDISC Laser videodisc
16MM..... 16mm film
KIT..... Kit
MAG Magazine
SOFT..... Computer software
CD Compact audio disc
CASS..... Audio cassette

Once you have decided on the category codes to use, you can define them for *Surpass/2* by using the Circulation Categories feature of the System Setup menu (see Page 188). The category codes do not have to be defined for *Surpass/2* before you add books, but they should be defined before you begin using the circulation features of *Surpass/2*.

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Installing Surpass/2

Before you can begin using *Surpass/2*, it must be "installed" on your computer's hard disk (or on your "file server" if you are using a network).

The installation of *Surpass/2* is done in two parts: copying the program and files from the floppy disk to your computer and configuring *Surpass/2* for your library.

Copying *Surpass/2* to Your Hard Disk

When you purchased *Surpass/2*, you received one or more floppy disks. These disks contain the *Surpass/2* program and empty data files to contain your library's bibliographic and patron information. The files on these disks must be copied to your computer's hard disk before you can begin using *Surpass/2*.

Follow these steps to copy *Surpass/2* to your hard disk. If you are not using a network such as Novell *Netware* or Artisoft *LanTastic*, you can skip the steps that begin with "Network Users Only." This might look a bit complicated if you don't have much computer experience, but don't let it frighten you! If you carefully follow the directions, you should have no problem. The commands you type are shown in the COURIER typeface and are underlined:

1. Turn on your computer. If you are not using a network, be sure that there is no floppy disk in the disk drive when you turn the computer on. If you are using a network, you should put your "workstation boot disk" (provided by the person who installed your network) in the first floppy disk drive.

If it asks for the date and time, answer these questions. You should be at a what is called a "DOS prompt" or "C prompt." This could look like "C>, C:\>".

2. *Network Users Only*
Login to your network as the network supervisor. If you are using Novell *Netware*, type:

```
LOGIN SUPERVISOR ENTER
```

If there is a password set up for the supervisor, you will be asked to enter it. If you do not know the supervisor password or if you are uncomfortable working at this level, ask your network supervisor (the person who maintains or installed your network) for assistance.

3. Type the following command:

```
PROMPT $PSG ENTER
```

Your prompt should now be "C:\> or F:\>"

4. Create a directory to contain *Surpass/2* by typing the following:

```
MD \SURPASS ENTER
```

By the way, the '\' character before "SURPASS" is called a "backslash." Don't confuse it with the normal or forward slash '/'. On most keyboards, it can be found next to the BACKSPACE key.

Directories are similar to folders in a file cabinet. They are a place set aside on your hard disk to store related programs and data. All *Surpass/2* files and programs are normally stored in the \SURPASS directory.

5. Change to the \SURPASS directory by typing:

```
CD \SURPASS ENTER
```

Your prompt should now be "C:\SURPASS>" or "F:\SURPASS>".

6. Insert the disk labeled "*Surpass/2* Disk 1" into Drive A (the first or only floppy disk drive) and type the following:

```
A: INSTALL ENTER
```

You'll see some file names listed on the screen as the files are copied to your hard disk. When it is finished, you will see the message, "The files have from this disk have been copied to your hard disk."

If you received more than one disk, repeat this step for each disk.

7. *Network Users Only*

Your files need to be "flagged" so that they can be used by more than one person at a time.

If you are using Novell *Netware*, type the following two commands:

```
FLAG *.* /SRW ENTER  
FLAG *.EXE /SRO ENTER
```

If you are using Artisoft *Lantastic*, type the following command:

```
ATTRIB +R *.EXE ENTER
```

When you enter any of the above commands, you will see a list of files scroll by on the screen.

You are now ready to go to the second part of installing *Surpass/2*: configuring *Surpass/2* for your library. Remove the *Surpass/2* installation disk from the floppy disk drive and, if you are using a network and a workstation boot disk, put that disk back into the floppy disk drive.

Configuring *Surpass/2* For Your Library

After the *Surpass/2* programs and files have been copied to your hard disk, you are ready to tell *Surpass/2* about your library and your computer system. This is done using a special program called *Config*.

Type the following command to start the *Config* program:

CONFIG ENTER

The *Config* program's menu will appear after a second or two. This menu has five numbered choices:

- 1. Library Name** Allows you to tell *Surpass/2* the name of your library.
- 2. Printer** Allows you to tell *Surpass/2* the brand and model of the printer connected to your computer.
- 3. CONFIG.SYS.....** Allows you to change the contents of the CONFIG.SYS file. This file is used by your computer when it starts to configure it for the software that will be running on it.
- 4. AUTOEXEC.BAT** Allows you to change the contents of the AUTOEXEC.BAT file. This file is used by your computer when it starts to give it a list of commands to execute.
- 5. Exit.....** Allows you to return to the "C:\SURPASS>" or "F:\SURPASS>" prompt when you have finished using the *Config* program.

As you complete each of the first four steps, a check mark will appear next to the item. You should complete all four steps (in any order) before you use *Surpass/2*.

Library Name

Select the first menu item, **Library Name**, by either pressing the `1' key or using the arrow keys to move the highlight to it and pressing ENTER.

A window will appear in which you may type your library name and a short "location code."

Type your library name using both upper- and lowercase letters. You can use the left and right arrow keys to correct any typing mistakes. After you have typed the library name, press the ENTER key to move to the Location Code field. For example, type: Palmetto Senior High School and press ENTER.

The location code is a word or number that helps *Surpass/2* to separate the records of your library from others in your school or library system. If yours is a school library, you might want to use the number assigned to your school by the school district. Or, you might want to just enter the first several letters of your school or library name.

Type your location code using up to five letters or digits and press the ENTER key. You can use the left and right arrow keys to correct any typing mistakes. For example, type: PALM and press ENTER.

After you enter your location code, a message will appear at the bottom of the screen telling you to press any key to continue. Press any key to return to the menu. You will see that there is a check mark next to "1. Library Name."

Printer

Select the second menu item, **Printer**, by either pressing the `2' key or using the arrow keys to move the highlight to it and pressing ENTER.

A window will appear containing a list of supported printers. Use the up and down arrow keys to move the highlight and scroll through the list (which may be longer than what you see on the screen).

If you find your printer's brand and model in the list, move the highlight to it and press the ENTER key.

If you do not find your printer's brand and model in the list, you may still be able to use it with *Surpass/2*. Check your printer manual to see if it can "emulate" (act like) one of the printers listed. Most dot-matrix printers are able to emulate Epson or IBM printers and most laser printers are able to emulate Hewlett-Packard LaserJet printers. This emulation might be automatic or you might have to change a switch or menu item on your printer. See your printer manual for instructions on how to do this. Move the highlight to the printer brand and model which can be emulated by your printer and press ENTER.

Don't be too concerned whether you chose the right printer. This can be changed later using a feature in *Surpass/2*'s Maintenance menu if you should have trouble printing.

After you have selected a printer, a small dialog box will appear telling you which printer you have selected and asking you to press any key to continue. Press any key to return to the menu. You will see that there is a check mark next to "2. Printer."

CONFIG.SYS

Select the third menu item, CONFIG.SYS, by either pressing the `3' key or using the arrow keys to move the highlight to it and pressing ENTER.

You will be asked to enter the "path name" of your CONFIG.SYS file. The *Config* program makes its best guess as to where this file is located and it almost always guesses correctly. So, you can just press the ENTER key to accept the default answer. The path name of the file is usually "C:\CONFIG.SYS" (your hard disk) or "A:\CONFIG.SYS" (your workstation boot floppy disk) if you are using a network.

The path name can be changed if necessary, but it is not recommended unless the default doesn't work for you and you are familiar with the technical aspects of your computer system. You should almost always just press ENTER when you are asked for the path name.

The *Config* program will now read the contents of your current CONFIG.SYS and automatically make any necessary changes to it. The contents of the file will be displayed on the screen so that you may manually edit the file if you like. You should not change the file unless

you are familiar with the workings of the CONFIG.SYS file and know that it needs to be changed.

For your information, the Config program automatically edits or adds the lines that say "FILES=35" and "BUFFERS=8". These are the minimum numbers required to run *Surpass/2*.

Press the F2 key to save the changes made by the Config program (or by your editing). You will be returned to the menu and there be a check mark next to "3. CONFIG.SYS."

AUTOEXEC.BAT

Select the fourth menu item, AUTOEXEC.BAT, by either pressing the `4' key or using the arrow keys to move the highlight to it and pressing ENTER.

You will be asked to enter the "path name" of your AUTOEXEC.BAT file. The *Config* program makes its best guess as to where this file is located and it almost always guesses correctly. So, you can just press the ENTER key to accept the default answer. The path name of the file is usually "C:\AUTOEXEC.BAT" (your hard disk) or "A:\AUTOEXEC.BAT" (your workstation boot floppy disk) if you are using a network.

The path name can be changed if necessary, but it is not recommended unless the default doesn't work for you and you are familiar with the technical aspects of your computer system. You should almost always just press ENTER when you are asked for the path name.

The *Config* program will now read the contents of your current AUTOEXEC.BAT and automatically make any necessary changes to it. The contents of the file will be displayed on the screen so that you may manually edit the file if you like. You should not change the file unless you are familiar with the workings of the AUTOEXEC.BAT file and know that it needs to be changed.

For your information, the Config program automatically edits or adds the lines that say "SET CLIPPER=F35;E000" and "PROMPT \$P\$G". The number after the `F' (F35) is the minimum number required for your computer to run *Surpass/2*.

Press the F2 key to save the changes made by the Config program (or by your editing). You will be returned to the menu and there be a check mark next to "4. AUTOEXEC.BAT."

Exit

After you have completed the above steps and there are check marks next to the first four menu items, select the fifth menu item, Exit, by either pressing the `5' key or using the arrow keys to move the highlight to it and pressing ENTER.

A dialog box will appear asking "Are you ready to exit the Config program?" Answer "yes" by either pressing the `Y' key or using the arrow keys to highlight "Yes" and pressing ENTER.

If there were any changes made to the CONFIG.SYS or AUTOEXEC.BAT files, a dialog box will appear telling you that your computer must be reset (re-started) before you can begin using *Surpass/2*

Note to Network Users

If you are using a network, you must use the *Config* program to change the AUTOEXEC.BAT and CONFIG.SYS files on each workstation which will be running *Surpass/2* connected to your network by doing the following on each workstation:

1. Make sure the computer's boot disk is in its drive and turn on the workstation (computer).
2. Login to your network as the network supervisor. If you are using Novell *Netware*, type:

LOGIN SUPERVISOR ENTER

If there is a password set up for the supervisor, you will be asked to enter it. If you do not know the supervisor password or if you are uncomfortable working at this level, ask your network supervisor (the person who maintains or installed your network) for assistance.

3. Change to the \SURPASS directory by typing:

CD \SURPASS ENTER

Your prompt should now be "F:\SURPASS>".

4. Start the *Config* program by typing:

CONFIG ENTER

5. Follow the instructions listed in the previous section, "Configuring *Surpass/2* For Your Library," to change the CONFIG.SYS and AUTOEXEC.BAT files (menu items 3 and 4). You do not need to do anything with the Library Name or Printer options.

Starting Surpass/2

The following steps will get you into the *Surpass/2* program:

1. Turn on your computer. If you are not using a network, be sure that there is no floppy disk in the disk drive when you turn the computer on. If you are using a network, you should put your "workstation boot disk" (provided by the person who installed your network) in the first floppy disk drive.

If it asks for the date and time, answer these questions. You should be at a what is called a "DOS prompt" or "C prompt." This could look like "C>, C:\>".

2. **Network Users Only**

Before you can access the programs and data on your file server, you will have to "login" to the network. Your network supervisor or the person who installed your network will have set up one or more "login names" and passwords for you to use. For example, if the network supervisor has set up a login name, "CIRC," and you are using Novell *Netware*, you would type the following:

```
LOGIN CIRC ENTER
```

If there is a password set up for the login name you used, you will be asked to enter it. If you do not know the password ask your network supervisor for assistance. Note that the password will not appear on the screen as you type.

Your network supervisor can assign a "script" to be followed whenever a person logs into the network. This script can be made to automatically start the *Surpass/2* program. If so, you will not have to go beyond this step.

3. Change to the *Surpass/2* directory by typing the following command:

```
CD \SURPASS ENTER
```

By the way, the ` character before "SURPASS" is called a "backslash." Don't confuse it with the normal or forward slash '/'. On most keyboards, it can be found next to the BACKSPACE key.

4. Start the *Surpass/2* program by typing the following command:

SURPASS ENTER

You will soon be greeted with the *Surpass/2* Main menu.

If you have set up one or more passwords (security codes), you will be asked to enter your security code before you are given access to *Surpass/2*. Note that the keys you type do not appear on the screen when you are entering your password.

Surpass/2 And Your Computer

It has been said, "all the World is a stage." Perhaps that adage can be adapted to "the computer is a stage." Like a stage, a computer by itself is rather useless. But with a script (a program), some actors and a director (you), the stage (computer) is transformed into a magical place where the only limit is human imagination.

Surpass/2 is your script and your computer is the stage and the actors. As the director, you must know how to put it all together and conduct the show. This section introduces you to what you'll need to know to sit in the director's chair.

Menus

You tell *Surpass/2* what to do by making selections from its "menus" just as you would make selections from a restaurant's menu. *Surpass/2* has two distinct types of menus:

Horizontal These menus appear horizontally near the top of the screen. Often, selecting an item from a horizontal menu will reveal another, vertical, menu to allow you to narrow your selection.

Vertical..... These menus appear vertically on the screen, usually below an item of a horizontal menu. These menus are also called "pull-down" menus because they appear to be pulled down from the top of the screen.

Quite often, when you make a selection from a vertical menu, another vertical menu will appear below and slightly to the left or right of the original menu. For example, if you select "Inventory" from *Surpass/2*'s Main menu, a vertical menu will appear with a list of choices related to working with the inventory. One of these choices is "Reports." If you select "Reports," another vertical menu will appear beneath "Reports" with a list of the different inventory reports available.

The Main Menu

When you first start *Surpass/2* and after entering a valid password (if you are using this feature), you will see a blank screen with a horizontal menu of five selections near the top of the screen. This is the Main menu. Any feature of *Surpass/2* may be used by first selecting one of these five menu items:

Inventory This selection leads to a menu dealing with all aspects of inventory control and cataloging. This includes entering materials, printing reports, printing barcode labels and performing a physical inventory.

- Patrons** This selection leads to a menu dealing with patron records. This includes entering patron information and printing patron reports and cards or labels.
- Circulation** This selection leads to a menu dealing with all aspects of circulation. This includes checking in and out and printing circulation reports.
- Maintenance** This selection leads to a menu dealing with the setup and maintenance of your *Surpass/2* system.
- Exit** This selection allows you to leave the *Surpass/2* software and return to your computer's operating system (usually MS-DOS). You should always use this selection to exit *Surpass/2* and return to the operating system before turning off or resetting your computer.

For detailed information about any of the Main menu selections, see the appropriate chapter of this manual.

Navigating Through Menus

Each menu has one item which is highlighted (displayed differently from the others). On vertical menus, for example, the highlighted item is displayed as white on violet and the other items are violet on black. Monochrome displays, of course, cannot use color and the highlighted item is shown differently. This highlight is called a "selection bar" and the item highlighted is called the "current selection."

The selection bar can be moved with the arrow keys. The right and left arrow keys move the selection bar on horizontal menus and the up and down arrow keys move the selection bar on vertical menus.

When a desired menu item is highlighted, press the ENTER key to perform the function associated with the menu item.

For example, the following steps would be used to go to the point where you may print a Dewey Divisions Report (assuming that *Surpass/2* is at the Main menu):

1. Use the arrow keys to move the selection bar to the "Inventory" item of the Main menu.

2. Press ENTER.

The vertical Inventory menu will be displayed beneath "Inventory."

3. Use the arrow keys to move the selection bar down to "Reports."

4. Press ENTER.

The vertical Inventory Reports menu will be displayed beneath and slightly to the right of "Reports."

5. Use the arrow keys to move the selection bar down to "Dewey Divisions."

6. Press ENTER.

Surpass/2 will be ready to print the Dewey Divisions Report.

The ESC key is used to move back to the previous menu. If you performed the above steps, *Surpass/2* will be asking you to get the printer ready to print the Dewey Divisions Report. The following steps would return you to the Main menu:

1. Press the ESC key.

You will be returned to the Inventory Reports menu.

2. Press the ESC key.

You will be returned to the Inventory menu.

3. Press the ESC key.

You will be returned to the Main menu.

The ESC key has this effect throughout *Surpass/2*--it takes you back one step.

Shortcut And Hot Keys

There is an alternative method for selecting items from menus. This is by using "hot keys."

Each menu item has one letter which is brighter or underlined. In the Main menu, for example, the letter 'P' in "Patrons" is brighter than the rest of the word. This is the hot key.

The hot key allows you to directly select a menu function and perform the features associated with it--without pressing ENTER. For example, when you are in the Main menu, you can instantly go to the Patron menu by pressing the P key.

In the "Navigating Through Menus" section, an example was given showing the steps to go to the Dewey Divisions Report of the Inventory Reports menu. Using hot keys, these steps would be as follows (assuming you are in the Main menu). Notice that you never press the ENTER key:

1. Press the I key.

The Inventory menu appears.

2. Press the R key.

The Inventory Reports menu appears.

3. Press the D key.

Surrpass/2 is ready to print the Dewey Divisions Report.

Menus of Enter/Edit Screens

Enter/Edit Screens are where you typically add new records (inventory items, patrons, etc.), make changes to existing records and delete records.

```

Surpass/2 - Your Media Center                                Thursday, February 14, 1991 12:00:00
Add  Find  Edit  Delete  List  Status  Ledger  Next  Previous  Exit

Patron Information
Patron Number:      1753308  Expiration:  /  /
Name (Last/First): Anderson, Henry
Street:             109 W. 29th Street
City, State, ZIP:  Orlando, FL 32405
Telephone:          (407)555-2931

Patron Type or Grade: Grade 5

Location: 0215      Address at Location: 301

Parent Name:       Julia Anderson
Emergency Phone: 555-7770
:

```

The Patron Information Enter/Edit Screen

When you start one of the Enter/Edit Screens, a blank window and a menu appear. The window is where records are displayed and where you enter and make changes to records.

These screens have a menu across the top. The menu functions available depend on what you are entering or editing, but there a number of functions which are common to most Enter/Edit Screens. Therefore, once you understand what they do in one screen, you know how to use them in every screen.

Add When you select Add, the window is cleared and you are allowed to enter information for a new record.

You can use the up and down arrow keys to move from one field to another. The ENTER key can be used to move from one record to the next.

To tell the computer you are finished entering, press the enter key when you are on the last field or press the PGDN key. The PGDN key works differently on some screens. When that is the case, you will be told to use a different key (usually the F2 key).

After you have finished filling out the window, the computer will display a message at the bottom of the

screen asking whether you want to add this record. If you answer "yes," the record will be saved. If you answer "no," the window will be cleared and the record will not be saved.

If you press the ESC key when adding a record, the window will be cleared and the information you entered, if any, will not be saved.

The Add function has a shortcut key which may be used as an alternative method for selecting it. This is the INSERT key.

Find.....This function allows you to find a particular record within a file. When you select Find, the window is cleared and you are asked to enter the contents of a search field. After you type the contents of the search field and press ENTER, the computer attempts to locate the first record matching what you typed and displays the record on the screen.

When searching for words (not numbers), you can just enter the first several letters of the search field. If, for instance, you are in the Enter/Edit Patron screen and want to find the patron named "Sanders," you could just enter "SAN" and the computer would find the first patron whose name begins with those letters.

The computer pays no attention to whether or not you type a search field using uppercase, lowercase or mixed-case letters. Case is ignored when searching. In the above case (searching for Sanders), you could enter any of the following: "SANDERS", "sanders", "Sanders" or "SaNdErS".

When searching for a title in the Enter/Edit Items screen, the computer ignores the initial articles, "A", "An" and "The". These are called "non-filing characters" and they are ignored when searching for and sorting titles.

Most screens allow you to search on different fields. The Enter/Edit Patrons screen, for example, allows you to search by the patron's number or name. You are first

asked for the patron's number. If you leave this field blank (0) and press ENTER, you will be asked to enter the patron's name.

Edit..... This menu function allows you to make changes on the currently displayed record. You must first use the Find, List, Next or Previous functions to locate and display the record you want to edit. Then, you select Edit to make changes.

Just as with Add, you use the enter key or down arrow key to move from one field to the next or the up arrow key to move to the previous field. Editing is finished when you press ENTER on the last field or when you press the PGDN key. The PGDN key works differently in some screens (usually when you are allowed to enter or edit several "pages" of information). When this is the case, a message is displayed at the bottom of the window telling you which key to use.

If you press the ESC key when editing a record, the changes you made will be ignored and the original contents of the record will be restored.

Delete..... This function allows you to delete the currently displayed record. You must first use the Find, List, Next or Previous functions to locate and display the record you want to edit. Then, you select Delete (or press the DELETE key) to remove the record.

To prevent accidental deletion of records, you are always asked whether you want to delete the record. If you answer "yes," the record is removed from the file and the window is cleared. If you answer "no," the record is not removed.

Some records cannot be deleted. For example, you cannot delete an inventory item if the item is currently checked out to a patron. In these instances, a dialog box appears to tell you that the record cannot be deleted and why this is so.

The Delete function has a shortcut key which may be used as an alternative method for selecting it. This is the DELETE key.

List This feature allows you to display a window with a list of records. You can use the up and down arrow keys and the PGUP and PGDN keys to scroll through the list.

To display the record for an item on the list, move the selection bar to the item, using the arrow keys, and press ENTER. The List window will disappear and the item you selected will be displayed in the Enter/Edit window.

Press the ESC key if you do not want to select an item from the list. The List window will disappear and the Enter/Edit window will be cleared.

The items in the List window are sorted. The sort order is based on how you last found a record using Find (if at all). If for example, you used Find to locate a patron by his or her number, the list will appear in numerical order. If you found by the patron's name, the list will appear in alphabetical name order.

View This function changes how the record is displayed. Some types of records can be displayed in several "views." For example, inventory item records can be displayed as "Simple MARC," "Full MARC" or "Abbreviated MARC." It does not alter the contents of the records, but rather how the information is presented on the screen.

When you select View, a menu appears beneath the View function. You select how you want the records displayed by selecting one of the items from this menu. The types of views available depend on the type of record you are entering or editing.

Most items in View menus have shortcut keys associated with them. These are listed to the right of each item on a View menu. These shortcut keys allow you to quickly change the view without having to select the View function and then one of its features. For example, the F5

key can be used in the Enter/Edit Inventory Items screen to switch to the Full MARC view.

If, after selecting the View function, you decide that you don't want to change the current view, press the ESC key when the View menu is displayed.

Next This function displays the next record. As with the List function, the order depends on how you last found an item with the Find function (if at all).

For example, if you used the Find function in the Enter/Edit Patrons screen to find a patron based on the patron's name, the Next function would display the next record in alphabetical name order.

If the currently displayed record is at the bottom of the sorted list, the computer "wraps around" to the top of the list and displays the first record.

The Next function has a handy shortcut key which may be used as an alternative method for selecting it. This is the down arrow key. Pressing the down arrow key will take you to the next item.

Previous..... This function displays the previous record. As with the Next function, the order depends on how you last found an item with the Find function (if at all).

If the currently displayed record is at the top of the sorted list, the computer "wraps around" to the bottom of the list and displays the last record.

The Previous function has a handy shortcut key which may be used as an alternative method for selecting it. This is the up arrow key. Pressing the down arrow key will take you to the next item.

Exit This function returns you to the previous menu.

The Exit function has a shortcut key which may be used to quickly return you to the previous menu. If you press

the ESC key twice, you will be returned to the previous menu.

The first time you press ESC, the Exit function is highlighted. You may then press the ESC key again to exit or select another function from the menu.

Using the Keyboard

There are a number of different keyboard layouts available for PC and PS/2 computers. While the normal "typewriter" keys do not vary much from one keyboard to another, the location of special editing and function keys do.

Take some time to become familiar with your keyboard.

All keys on the keyboard will begin to repeat when they are held down for more than a fraction of a second. Persons who are new to computers will often be very slow and careful when typing. That is fine. But don't be slow about releasing keys after you press them or they will begin to repeat. This effect can be especially confusing when using certain special keys such as ESC and ENTER.

It is possible for you to type faster than you computer can act on what you are typing. You can be as many as 15 keystrokes ahead of the computer. This is called "type ahead." If you get to far ahead of the computer (more than 15 keystrokes), the computer will sound a short beep for each additional key you press. *Surpass/2* turns off the type ahead feature when you are selecting items from a menu or when it wants to make sure you see a certain message before you continue.

The Numeric Keypad

On the right side of most keyboards is a group of keys that are grouped like those on a calculator. This is the numeric keypad.

These behave differently depending on whether the "Number Lock" is on or off. When the Number Lock is on, these keys act exactly like the number keys across the top of the "typewriter" section of your keyboard. When Number Lock is off, the keys become editing keys and take on the functions of the words and arrow symbols printed on the bottom of each key.

The NUMLOCK key is used to switch between these two modes. Some keyboards have a light (usually just above the NUMLOCK key) to tell you whether Number Lock is on or off.

The Arrow And Editing Keys

Newer "enhanced" keyboards have a set of arrow and editing keys between the typewriter section and the numeric keypad. These keys duplicate the editing features of the numeric keypad keys.

If your keyboard has these keys, it is more convenient to use them instead of those on the numeric keypad. This eliminates the necessity of turning the Number Lock on and off.

Function Keys

The keys labeled F1 through F10 or F12 are the "function keys." On enhanced keyboards, these are across the top of your keyboard. On other keyboards, they are on the left side of your keyboard.

The functions performed by these keys will vary depending on which feature of *Surpass/2* you are using. When using the Enter/Edit Items screen, for instance, the F5 key will change the display to the "Full MARC" view.

These functions of these keys are explained where applicable within this reference guide.

Using Key Combinations

Some key commands require that you press more than one key simultaneously. These "key combinations" are shown in this manual with a hyphen (-) between the two keys.

For example, to enter the key combination, CTRL-Y, you hold down the CTRL key and strike the Y key. Do this just as if you were typing a capital `Y' except press the CTRL key instead of the SHIFT key.

Menu Keys

The following keys are used for making selections from menus or selection lists:

Up Arrow Moves the selection bar up one line on vertical (pull-down) menus and on selection lists.

Down Arrow..... Moves the selection bar down one line on vertical (pull-down) menus and on selection lists.

Left Arrow Moves the selection bar to the left on horizontal menus.

Right Arrow Moves the selection bar to the right on horizontal menus.

ESC..... When in a vertical (pull-down) menu, causes the current menu to disappear and returns you to the previous menu.

When in a horizontal menu, moves the selection bar to the Exit function. Pressing ESC or ENTER when the Exit function is highlighted will return you to the previous menu.

ENTER..... Performs the function associated with the currently highlighted menu item.

INSERT Performs the Add function on Enter/Edit screens and allows you to enter information for a new record

DELETE Performs the Delete function on Enter/Edit screens and allows you to delete the currently displayed record.

SHIFT-PRINTSCREEN

Prints the current screen on your printer.

Editing Keys

The following keys are used when typing information into fields:

Up Arrow Moves the cursor to the first character of the previous field.

Down ArrowMoves the cursor to the first character of the next field (same as ENTER).

Left ArrowMoves the cursor one character to the left without deleting any characters.

Right ArrowMoves the cursor one character to the right without deleting any characters.

BACKSPACE.....Moves the cursor one character to the left deleting the character.

This key is sometimes labeled with a left arrow symbol and is usually located in the upper-right corner of the typewriter section. Do not confuse the BACKSPACE key with the left arrow key--they perform different functions.

ENTER.....Moves the cursor to the next field (if any). If the cursor is in the last field on the screen, ENTER completes the edit and saves any changes made to the record.

HOME.....Moves the cursor to the first character of the current field.

CTRL-HOMEMoves the cursor to the first character of the first field.

ENDMoves the cursor to the end of the current field.

CTRL-ENDMoves the cursor to the first character of the last field.

PGDN.....Completes the editing mode and saves any changes made. Same as pressing ENTER on the last field.

The PGDN key behaves differently in some instances. These are cases where you are allowed to enter more information than will fit on the screen. In these cases, the PGDN and PGUP keys are used to move to the next or previous page of information and the F2 key is used to complete the editing mode.

INSERT.....Turns the insert mode on or off.

When the insert mode is on, any characters typed with be inserted at the current cursor position and all characters to the right of the cursor will be shifted on space to the right to make room. This is called "insert mode."

When the insert mode is off, any character typed will replace the character at the current cursor position. This is called "overtyping mode."

Insert mode is normally off when you start *Surpass/2*.

DELETE Deletes the character at the cursor position and moves all characters after the cursor to the right to fill in the space.

CTRL-Y Deletes all characters in the current field and moves the cursor to the beginning of the field.

F2 On Enter/Edit Screens where PGDN has a different function, F2 allows you to complete the editing and return to the menu.

CAPSLock Turns the capitals lock mode on or off.

When capitals lock is on, all characters typed will be in uppercase. When it is off, all characters typed will be in lowercase unless the SHIFT key is held down.

The CAPSLock key works just like the "shift lock" key on a typewriter except that only alphabetical keys are shifted. Number and symbol keys are not effected by CapsLock.

Some keyboards have a light, usually above the numeric keypad, to tell you whether capitals lock is on or off.

The following keys are available only when adding or editing inventory items in the Enter/Edit Inventory Items window (explained starting on Page 58) and when records are displayed in the Full or Abbreviated MARC view:

F3 Inserts a new MARC field at the cursor position and moves fields below the cursor down one line.

- F4**.....Inserts a new MARC subfield at the cursor position of the current field and moves all fields and subfields below the cursor down one line.

- F5**.....Deletes the MARC field where the cursor is located (including all subfields) and moves fields below the cursor up one line.

- F6**.....Deletes the MARC subfield where the cursor is located and moves fields and subfields below the cursor up one line.

Using the Printer

There are many types of printers that can be used with *Surpass/2*. Each one is different, so you should read your printer's manual to learn how to operate it and to load paper into it.

Before printing any report, *Surpass/2* displays a dialog box telling you the width of the paper required by the report and asking you to align the paper to the top of the page.

Each printer has an on-line button (sometimes labeled "Select"). Your printer must be on-line (or selected) before it can print information sent to it from the computer.

If you use the roller knob on the side of the printer to adjust the paper to the top of the page, make sure you tell the printer you have done this (it might think it was on the 30th line of the page and you've moved the paper to the top). Some printers have a "set top of form" button to allow you to do this. This button is often labeled "TOF" or something similar and it can only be used when the printer is off-line (or deselected).

If your printer does not have a "set top of form" button, one sure way is to turn the printer off, align the paper to the top of the page, and then turn the printer back on. Printers usually assume the paper is at the top of the page when they are turned on.

If some of the pages of your reports start in the middle of a page, it's almost a sure bet that that's where the printer "thinks" the top of the page is. Use one of the above methods to adjust this.

Laser printers do not need to be adjusted to the top of the page, since they print on only single sheets of paper. When you are using a laser printer to print a report, you are asked to insert the proper paper tray (letter or legal paper) in the printer.

You may stop *Surpass/2* from completing a report that is being printed by pressing the ESC key. A dialog box will appear asking whether you want to stop the report. If you answer "yes," the *Surpass/2* will stop printing and return to the previous menu. If you answer "no," the report will continue from the point where you stopped it.

Quite often, your printer will continue to print long after the computer has finished or after you have stopped it. This is because the information has already been sent to the printer's memory (buffer). The printer will continue to print until its buffer is empty or until you turn it off.

If you are using a printer attached to a network, your reports might not begin printing until after the computer has finished. This is due to the way the print queue works on your network. Or, if you stopped a report and turned off the printer to clear its memory, the report might resume printing the next time the printer is turned on. Again, this is because the report is stored in the network's print queue. These features are controlled your network software.

Making Backups

Surpass/2 and all the data managed by it are stored on your computer's (or fileserver's) hard disk. If you don't have a "backup" copy this is the *only* place it's stored.

Making regular backup copies of your *Surpass/2* programs and data is very important. While hard disks are very reliable, they are not immune to fire, flood, power "glitches" and any number of man-made disasters, whether accidental or otherwise. Having a backup of what's on your hard disk is like having an insurance policy for your data.

How Often Should You Make Backups?

Your most-recent backup becomes obsolete the moment you add a new book, change a patron, check out a book or make any kind of changes to the information stored in your computer. Of course, it would not be practical to make a backup each time you check out a book, but some happy medium can be reached that is both safe and practical.

How often should you make backups? Often and regularly. What is often and regularly? A good rule of thumb is to make a backup when it would take much more effort to re-do all the work you've done since the last backup than it would be to make a new backup. Just remember, the work you've done since the most-recent backup is not insured and could possibly be lost. Now, it's highly unlikely that you'll ever need to use the backup; but then, it's highly unlikely that you'll ever need to use your homeowner's insurance policy either. Backups are cheap insurance.

You should devise a schedule for making backups and strictly adhere to it. Some people make backups each Friday afternoon. Others backup daily. Devise a backup routine between these two extremes that best fits your schedule and stick to it.

Floppy Disk or Tape?

Backups are usually made on one of two mediums: floppy disks or computer tape.

Floppy disks don't require any special equipment (your computer probably already has a floppy disk drive), but they require many disks, a lot of time and a person sitting by the computer to constantly "feed" new disks to the computer.

Tape backups are much faster, usually require only a single tape cartridge and, once started, can run by themselves without any help from a human. The only disadvantage to tape backups is that they require a tape drive. Tape drives, however, are becoming very inexpensive. As of this writing, the price of an average 60-120 megabyte tape drive is about \$400. If you don't have a tape drive, think seriously about requesting one in your next budget.

How Many Disks do You Need?

If you plan to use floppy disks to make backups, make sure you purchase the correct size (5-1/2" or 3-1/2") and density (double or high) for your computer's floppy disk drive.

High-density disks (sometimes called DSHD) store at least twice the data as double-density (DSDD) disks and, therefore, a backup can be made using half the number of disks it would take otherwise. If your computer can use high-density disks (not all can), make sure you purchase disks labeled "DSHD" or "high-density."

The only way to know for certain how many disks a backup will take is to make the backup and count the disks *after* you're finished. Of course, this doesn't help you decide how many disks to purchase. A good rule of thumb is to assume that a backup will take one or two more disks than the previous backup (assuming you haven't added much new data in the meantime).

When making your very first backup, take the size of your computer's hard disk drive (20 megabytes, 60 megabytes, etc.) and divide it by the capacity of the floppy disks you will be using. The following table shows the capacities of the four standard combinations of disk size and density:

Size & Density	Capacity (in megabytes)
5-1/4" double	0.30
5-1/4" high.....	1.25
3-1/2" double	0.60
3-1/2" high.....	1.44

For example, if you have a 20-megabyte hard disk and are using 3-1/2", high-density disks, the maximum number of disks required to make a backup would be 14 ($20 / 1.44 = 14$). Because it is unlikely that your hard disk is full of data at this time, the actual number of disks required will probably be much less.

How do You Make a Backup?

If you purchased a tape drive, it came with special software and instructions for making backups. Follow the directions that came with the tape drive to backup your hard disk or file server.

Your computer's operating system, MS-DOS or PC-DOS, comes with a standard program, simply called "BACKUP," for making backups on floppy disks. However, there are commercial alternatives which are faster, more reliable, easier to use and which can compress the data so that fewer disks are required. Two of the most popular such backup packages are *Fastback* and *Central Point Backup* (also a part of *PC Tools*). These can help take the chore out of making regular backups and are highly recommended.

To make a backup of your *Surpass/2* programs and files using the built-in MS-DOS or PC-DOS BACKUP program, type the following command:

```
BACKUP C:\SURPASS\*.* A: ENTER
```

The "C:\SURPASS\" part of the above command could be different depending on where your *Surpass/2* programs and data are stored. For

example, if you are using a Novell network, the proper command might be:

```
BACKUP F:\SURPASS\*. * A: ENTER
```

If your *Surpass/2* programs and data are stored in the F:\APPS\SURPASS\ directory, the command would be:

```
BACKUP F:\APPS\SURPASS\*. * A: ENTER
```

If you are not sure where your *Surpass/2* programs and data are stored and your system was installed by another person, ask that person for assistance.

After you enter the BACKUP command, the computer will ask you to insert a blank disk in the floppy disk drive. Insert a blank disk and press any key. After it has "filled" the disk, the computer will tell you to remove the disk and to insert another blank disk. This will continue until the backup is complete. Label the disks ("Backup Disk 1," "Backup Disk 2," etc.) as you remove them.

Network Users Note

If you are using a local area network, such as Novell *Netware* or Artisoft *Lantastic*, make sure that there are no other workstations running any of the *Surpass/2* programs. Turn the other workstations off or make sure they are running programs other than *Surpass/2*. The backup program cannot make a complete backup of the *Surpass/2* programs and data if other workstations are accessing them.

Rotating Backup Sets

Disks and tapes used for a making backups can be re-used the next time you make a backup. The data on the old disks or tapes is erased and the new data is written in its place.

Using the same disks each time you make a backup, however, is not wise. It's not wise because disks and tapes can eventually wear out after they have been used a number of times. You could be in trouble if you need to retrieve data from a backup and find that one or more of the disks or tapes is bad. For these reasons, it is highly advisable to use more than one "set"

of disks (or more than one tape) for making backups and rotating which set you use each time.

For example, let's say you make backups on Wednesdays and Fridays and that it takes about 20 disks to make a backup. Instead of using the same 20 disks each time, you would use three sets of 20 disks labeled "Set A," "Set B" and "Set C" and the following schedule:

- 1st Wednesday Use the 20 disks in Set A.
- 1st Friday Use the disks in Set B.
- 2nd Wednesday Use the disks in Set C.
- 2nd Friday Use the disks in Set A.
- 3rd Wednesday Use the disks in Set B.
- 3rd Friday Use the disks in Set C.

Use a different set each time you make a backup, going back to Set A after you have used Set C. By using a schedule such as this, if something happens to your most-recent backup, you'll have two older backups to fall back on.

As an added precaution, take your most recent backup home with you, put it in a fire-proof safe or send it to another building. If something should happen to your computer and backups (fire, theft, etc.), you will at least have one set of backup disks in a safe place.

Because tapes and disks will eventually go bad, it's not a bad idea to replace them with new tapes or disks at regular intervals. A good procedure would be to use fresh, new tapes or disks at the beginning of the year.

Backup Summary

By following the rules below, you can feel secure that your precious data is safe:

- **Backup often.**
Making backups is time-consuming and it is easy to fall into the trap of always saying "I'll do it later." Don't fall into that trap! Make a schedule and stick to it.

- **Rotate your backup sets.**
Don't use the same disks or tapes each time you make a backup. Use at least three sets and use a different set each time you make a backup.
- **Keep your most-recent backup off-site.**
Don't have all your backups in the same building as your computer. If the computer and backups are stolen or lost in a fire or flood, you'll at least have a backup in a safe place.
- **Discard old disks or tapes.**
Replace old disks and tapes with new ones at least once a year.



Inventory

The Inventory feature of the Main menu contains features that allow you to work with bibliographic records stored in your computer.

When you select Inventory from the Main menu, a menu appears allowing you to select from the following features:

Enter/Edit Items Allows you to display bibliographic records (books), add new records and make changes to existing bibliographic records.

Cross References..... Allows you to display, add and/or edit the subject and author cross references used by the optional *Surpass/2 Catalog* software.

Labels & Cards..... Allows you to print barcode labels, spine labels and catalog cards.

Reports..... Allows you to print reports of the items in your collection.

Lost & Found..... Allows you to tell *Surpass/2* about lost books and to charge patrons for books they have lost.

Physical Inventory .. Helps you perform a regular physical count of the items in your collection.

Import..... Allows you to add new bibliographic records to *Surpass/2* by reading the records from floppy disks.

Enter/Edit Items

The Enter/Edit Items function of the Inventory menu allows you to find, display, add and make changes to inventory records. This includes books, A/V material, serials, equipment and any other type of item in your library's collection.

Bibliographic information can be displayed and editing on the screen in any of different formats (views):

Simple MARC..... Displays bibliographic information in an easy-to-read format. Simple MARC does not display every field and subfield of the MARC record. Simple MARC view is used as the default when you select the Enter/Edit Items feature

Abbreviated MARC Displays selected fields of the MARC record in a standard MARC view with field tags, field descriptions, indicators, subfield tags and subfield descriptions in the left side of the window and the contents of the fields in the right side of the window.

Full MARC..... Displays all fields of the MARC record in a standard MARC view. This is the same format as Abbreviated MARC view, but includes every field of the MARC record.

The way you display information in the Enter/Edit Items window is fully a matter of personal preference. You can easily switch from one view to another using the View feature of the Enter/Edit Items menu. In any case, the view you select has no effect on the actual contents of the record. If a field does not appear in a certain view, that does not mean that the field is not a part of the record. For example, Field 10 (LCCN) might not be displayed in the Abbreviated MARC view, but that does not mean you won't see it when the record is displayed in the Full MARC view.

If you want your bibliographic information to fully conform to the LC MARC format, you should consider using MARC records available from sources such as *Bibliofile* CD ROM discs or MicroLIF records supplied by most book vendors. These MARC records can be put into your *Surpass/2* system using the Import feature of the Inventory menu. You can manually add records but they will probably not be "true" and complete Library of

Congress MARC records unless you carefully follow AACR2 rules and enter the complete bibliographic record.

Simple MARC View

Simple MARC view displays inventory records in a format which is easy to read and is especially useful for those who are not yet familiar with MARC records.

```

Surpass/2 - Your Media Center          Thursday, February 14, 1991 12:00:00
  Add  Find  Edit  Delete  List  View  Next  Previous  Exit
Inventory Records (Simple MARC)
901a Barcode: 27512                      Title Number:
100a Author: Freedman, Russell.
100d Flourish:
245a Title: Lincoln :
250a Edition:
260b Publisher: Clarion,                260c Date: c1987 260a Place: New York :
300a Phys Desc: 150 p. :                300b Illus: ill. :    300c Dwn: 24 cm.
520a Notes: Photographs and text trace the life of the Civil War President
900a Call No: 921 LIN                    910a Catgy:          940a Reading Level:
Topical Subject Headings
650a Topic                               650x General Subdivisions          650z Geographic
Presidents                               Biography                          Juvenile literature. United States
Presidents.                               Biography                          United States
Presidents
Copy Information
Location: 0215 Status: In Library        Copies: 1 Barcode: 27512
Acquisition Date: 12/11/1990 Vendor:    Cost: 11.65 Fund:

```

The Simple MARC view of the Enter/Edit Items window.

The Simple MARC window is divided into three sections. The top section contains most of the bibliographic information. The middle section contains topical subject headings. The bottom section contains information for individual copies of a title.

Each field on the Simple MARC window is preceded with its MARC field tag and subfield letter. These are provided as a reference and serve to help you learn about where information is stored in MARC records.

Long Fields

Some fields have the ability to contain more than can fit on the screen. When your cursor reaches the end of these fields, the letters will "scroll" to the left as you continue typing. When you press ENTER, the up arrow or down arrow keys to move to another field, only the first part of the field

will be displayed on the screen even though the contents might be much longer. For example, the Title field of the Simple MARC window is only 62 spaces long, but you can enter a title as long as 240 characters. When editing a long title, you can use the right arrow key to move the cursor to the last space of the field (the 62Nd space). If you press the right arrow key again, the contents of the field will move to the left displaying the 2Nd through 63rd characters of the title.

Simple MARC Fields

The following fields appear in the Simple MARC window. Some examples are given showing common punctuation. These examples are proper for most cases, but you should refer to AACR2 rules if you want your bibliographic records to follow the AACR2 standard. If you are not concerned with AACR2 punctuation, you may leave out the punctuation or follow the examples listed below.

Barcode The barcode number for the item. Each copy of each title has a unique barcode number that is used for circulation and inventory.

You may assign your own barcode numbers when adding titles. If you want to allow the computer to automatically assign a new number, leave the Barcode field blank (or put a zero in it).

If you attempt to add an item using a barcode number which has already been assigned to another item, *Surpass/2* will display a message telling you that it has given the item a different barcode number for the one you requested.

Barcode numbers can range from 1 to 99,999,999. (Do not type commas when entering barcode numbers 1,000 and higher).

The barcode number is also displayed in the Copy Information section of the Enter/Edit Items window.

Author The primary author main entry. This field should contain the author's last name, a comma and the author's first and middle names (given names).

- Flourish**Contains the primary author's year of birth and year of death (if deceased). Examples: "1947-" for an author born in 1947 and still flourishing; "1918-1989" for an author who lived from 1918 to 1989.
- Title**The title statement. To conform with the MARC standard, this field should contain only the main part of the title and not the extended portion of the title, the series statement or the statement of responsibility. These portions of the title are stored in different MARC fields and should be entered using the Abbreviated or Full MARC views.
- Edition**.....The edition statement. Example: "2Nd ed."
- Publisher**The name of the publisher. The publisher's name is normally followed by a comma. Example: "Columbia University Press,".
- Date**The date of publication, copyright or distribution. This is normally a year followed by a period. Example: "1988.".
- Place**.....The place of publication or distribution. This is normally a city, a comma, a state abbreviation, a space and a comma. Example: "Orlando, Fla. :".
- Phys Desc**The physical description (number of pages). This field normally contains the number of pages, a space, "p.", a space and a colon. Example: "143 p. :".
- Illus**.....Other physical details. This field usually contains information about whether the book has illustrations and/or photographs ("col." for color, "ill." for illustrations) followed by a space and a semicolon. Example: "col. ill. ;" would indicate that the book has color illustrations.
- Dmsn**The dimensions of the book. This is normally entered as the number of centimeters followed by a space and "cm." Example: "25 cm."
- Notes**.....The summary or annotation. The notes are normally entered as one or more sentences. There are 62 spaces

provided on the screen, but you may enter an annotation as long as 300 characters. The letters will scroll to the left as you type beyond the 62nd character.

- Call No.....** The local call number. This is the call number, Dewey, LC or otherwise, used for this item in your library.
Example: "641.5 WAT".

- Catgy** The category code to use for circulation and for reports. This field is used by *Surpass/2* to determine to whom and item may be checked out, the number of days it may be checked out, the daily fine rate, the maximum number of times it can be renewed and the number of grace days. (See "Circulation Categories" starting on Page 188.) It is also used to categorize your inventory for inventory and circulation reports. Examples "PBACK" for paperback book; "VHS" for VHS videotape.

- Reading Level ..** The reading level or intended audience for the book. This field is supplied by vendors of MicroLIF records.
Example: "2.4".

- Topic.....** The first part of a topical subject heading. There are six fields provided for topical subject headings. Each subject heading may be composed of a topic, one or two general subdivisions and a geographic subdivision. For "Freedom of the press--History--United States." you would enter "Freedom of the press" in this field.

- Subdivisions.....** The general subdivisions for the subject heading. There is space provided for two general subdivisions for each subject heading. In the above example, "History" would be entered into the first General Subdivisions field.

- Geographic.....** The geographic subdivision for the subject heading. In the above example, "United States" would be entered into the Geographic field.

The following fields are the only ones that change from one copy of a title to another. If you have three copies of a title, for example, you would only enter the bibliographic information (title, author, etc.) once. The copy information (barcode number, location, cost, etc.) is the only information that is different from one copy to another.

LocationA five-character abbreviation of the school, branch or building of where this copy of the item is located.

The codes used for location are up to you and should be consistent (items in one location should all have the exact same location code).

When adding new items, this field is automatically filled with the location code of your library. You can press ENTER to skip over this field or type over the default to make changes to it. You entered your library code when you installed *Surpass/2*.

Example: "HIGH".

Status.....Displays the current status of the copy of the item (in library, checked out, lost, holding for reservation, etc.) This field is automatically changed by the Circulation Transactions and Lost & Found features of *Surpass/2* and cannot be changed. When an item is added, its initial status is "in library."

Copies.....The number of copies of the book or other inventory item. This field is automatically updated when you add new titles, add new copies and delete copies of an inventory item using the Add/Title and Add/Copy features of the Enter/Edit Items menu. It is automatically updated and cannot be directly edited.

BarcodeThe barcode number of this copy. Each copy of a book or other item has a unique barcode number. This is the same barcode number that is displayed at the top of the Simple MARC window.

Acq. Date.....The date the item was purchased or otherwise acquired. The date should be entered in the following format: "mm/dd/yyyy" where "mm" is a two-digit month, "dd" is a two-digit day and "yyyy" is a four-digit year. Example: "03/09/1990". You do not have to type the slashes; they are automatically inserted.

When adding a title or a copy, this field is automatically filled with the current date. You may press ENTER to skip

over this field if the date is correct or type over it if you want to enter a different date.

- Vendor**..... The five-character vendor code. This field identifies the vendor from which this copy of the item was purchased. You may use any abbreviation you like, but you should always use the same vendor code for the same vendor. Example: "FBC".
- Cost**..... The amount paid for this copy of the item. The contents of this field is used for the Purchasing Report and for determining the maximum fine to charge when this item is overdue. (See "Circulation Categories, " Page 188.)
- Fund**..... The source of funds used for purchasing this item. The contents of this field is used for the Purchasing Report. You may use any abbreviations you like for this field, but you should always use the same abbreviation for the same fund. Examples: "CPT2" for Chapter II; "PTA" for Parent-Teacher Association; "BUDGT" for yearly budget.

Full and Abbreviated MARC Views

The Full MARC and Abbreviated MARC views display bibliographic information in a variation of the standard MARC format. This view can be used to display, add and edit either all (Full MARC) or selected (Abbreviated MARC) fields of bibliographic records.

Full MARC displays every field. Abbreviated MARC displays only the most "important" fields as set up using the MARC Tags feature of the Maintenance/System Setup menu.

Surpass/Z - Your Media Center		Thursday, February 14, 1991 12:00:00						
Add	Find	Edit	Delete	List	View	Next	Previous	Exit
Inventory Records (Abbreviated MARC)				Page 1 of 2				
ME:PersNam	100	10	a(Name):	Freedman, Russell.				
Title	245	10	a(Title):	Lincoln :				
			b(Reai):	a photobiography /				
			c(State):	by Russell Freedman.				
Publicatn	260	0	a(Place):	New York :				
			b(Publi):	Clarion,				
			c(Date):	c1987.				
Phys Desc	300		a(Numbe):	150 p. :				
			b(Illus):	ill. ;				
			c(Dimen):	24 cm.				
Subj:Topic	650	0	a(Topic):	Presidents				
			z(Geogr):	United States				
			x(Gener):	Biography				
			x(Gener):	Juvenile literature.				
Subj:Topic	650	1	a(Topic):	Presidents.				
Subj:Topic	650	8	a(Topic):	Presidents				
			z(Geogr):	United States				
Copy Information								
Location:	0215	Status:	In Library		Copies:	1	Barcode:	27512
Acquisition Date:	12/11/1990	Vendor:			Cost:	11.65	Fund:	

Abbreviated MARC view of the Enter/Edit Items window

The left side of the Abbreviated or Full MARC window displays the field names, field tags, indicators, subfield letters and subfield names. The right side displays the contents of the fields. See the section, "Learning About MARC Records," starting on Page 8, to learn about MARC records.

The bottom section of the MARC window, "Copy Information," contains those fields which are different for each copy of a title. These fields are explained in the section on the Simple MARC View.

Many MARC fields contain more than one subfield and the contents may be longer than a single line on the screen. For example, the title statement, "Everglades National Park / by Ruth Radlauer ; design and photos by Rolf Zillmer." would be displayed as:

Title	245	10	a(Title):	Everglades National Park/
			c(State):	by Ruth Radlauer ; design and photos by Rolf Zillmer.

en spec

The first two columns tell you that the lines that follow are part of the 245 "Title" field.

The next column, "10," contains the indicators for this field. The meaning of the indicators is different for each different MARC field. In the 245 field, the first digit, 1, tells that this title is an added entry (the author is the main entry) and the second digit, 0, tells us that zero letters are ignored

when sorting and searching (the title does not begin with "A," "An" or "The").

The third column, "a(Title)," tells us this is the Subfield A (title) portion of the 245 field. In the second line, "c(State)," tells us that this is the Subfield C (statement of responsibility) portion of the 245 field.

MARC Record Pages

Many MARC records contain too many fields to be displayed in a single window. Instead, they are displayed in "pages." The upper-right corner of the window tells you which page is displayed and how many pages make up the record. For example, "Page 1 of 3," tells you that you are viewing the first of three pages. Use the View/Next Page and View/Prev Page features or the PGUP and PGDN keys to "flip" through the pages.

Editing MARC Records

If you want to make changes to one of the fields in the displayed MARC record, select "Edit" from the Enter/Edit Items menu. The right side of the window (the side that contains the contents) will turn violet (or underlined on monochrome monitors) and your cursor will be positioned in the first space of the first field.

Use the up and down arrow keys to move the cursor to the field you want to edit. If you move the cursor beyond the top or bottom of the screen and there are more fields, the record will scroll up or down to allow you to edit that section. You can also use the PGUP and PGDN keys to move from one page to another.

Use the right arrow key to move the cursor to the position in the field where you want to make changes and begin typing. Or, if you want to insert characters, press the INSERT key to switch to insert mode. The cursor will change from an underline to a block and the letters you type will be inserted. Press INSERT again to turn off the insert mode.

If the insert mode is on and you type at the end of a line, *Surpass/2* inserts a new line and allows you to continue to type.

Press the F2 key when you are finished editing the MARC record. You will then be allowed to make changes to the Copy Information fields.

Some fields cannot be edited or deleted. For example, the MARC field tag, 901 (barcode), cannot be changed or removed. This field is

automatically inserted when a new copy is added and deleted when a copy is deleted.

MARC Record Editing Keys

The following editing keys may be used when adding or editing records in the Abbreviated or Full MARC views:

Up Arrow Moves the cursor up one line. If the cursor is at the top of the window and there are more lines above the cursor, the contents of the window will scroll down one line to allow you to edit the contents of the previous field or line.

Down Arrow Moves the cursor down one line. If the cursor is at the bottom of the window and there are more lines below the cursor, the contents of the window will scroll up one line to allow you to edit the contents of the next field or line.

Right Arrow Moves the cursor one space to the right.

Left Arrow Moves the cursor one space to the left.

PgUP Moves to the previous "page" of the MARC record.

PgDN Moves to the next "page" of the MARC record.

DELETE Removes the character at the cursor position and moves any remaining characters to the left to fill in the space.

END Moves the cursor to the end of the contents of the subfield.

CTRL-END Moves the cursor to the end of the MARC record, scrolling the screen if necessary.

ESC Returns to the Enter/Edit Items menu without saving any changes.

HOME Moves the cursor to the first character of the contents of the subfield.

CTRL-HOME..... Moves the cursor to the beginning of the MARC record, scrolling the screen if necessary.

INSERT..... Switches between "insert" and "overtyping" modes.

The cursor is a block when in insert mode and characters typed will be inserted at the position of the cursor and characters to the right of the cursor will be moved to the right to make room for the inserted text. If there is not enough room in the line for the inserted text, a new line is added.

The cursor is an underline when in overtype mode and characters typed will replace those at the position of the cursor.

F2..... Moves to the Copy Information section of the window and allows you to make changes to this section.

F3..... Inserts a new MARC field at the position of the cursor and moves the remaining fields down to make room.

You will be asked to enter the MARC tag for the new field. Type the number of the MARC field and **ENTER** or press the **F10** key to see a list of MARC fields and select from the list. Press the **ESC** key if you do not want to insert a new field.

If you are editing in Abbreviated MARC view, you will only be allowed to add fields that are normally displayed in the Abbreviated MARC view.

Some fields cannot be repeated within a MARC record. For example, Field 245 (title) must appear only once. If you attempt to insert a second Field 245, *Surpass/2* will display a message telling you that the field cannot be repeated.

Next, you are asked to enter the first indicator. A default value is automatically inserted into this field. Press **ENTER** if you want to use the default or type the first digit of the indicator and press **ENTER**.

If you press the F10 key when asked for the indicator, a list of indicators and their meanings will appear on the screen. You can select an indicator from this list.

You are then asked for the second indicator. The procedure for entering the second indicator is the same as for entering the first.

Don't be overly concerned with the numerical order of the fields. They will be sorted and saved in proper, numerical order by field tag when you are finished editing.

Press ESC when asked for the field tag or indicators if you do not want to insert a field.

F4.....Inserts a new subfield at the position of the cursor and moves the remaining fields down to make room.

You will be asked to enter the subfield code for the new subfield. Type the letter of the subfield and ENTER or press the F10 key to see a list of valid subfields and their meanings and select from this list. Press ESC if you do not want to insert a subfield.

F5.....Deletes the field and all its subfields and moves the remaining fields up one line to fill in the space.

When you press F5, you are asked whether you want to delete the field. The field will be deleted if you answer "yes." It will not be deleted if you answer "no."

F6.....Deletes only the subfield or the entire field if the field has only one subfield. The remaining subfields and fields are moved up one line to fill in the space.

When you press F6, you are asked whether you want to delete the subfield. It will be deleted if you answer "yes." It will not be deleted if you answer "no."

F7.....Sorts the fields in the MARC record by field number and sorts the subfields by numerical-then-alphabetical order.

Surpass/2 does not care about whether you insert MARC fields in numerical order or whether the fields of MARC records imported from MicroLIF or MARC disks are sorted; however, sorting the fields makes it easier for you to find specific information in large MARC records.

F10 Displays a list of valid field tags, subfield codes or indicators when you are asked to enter a field tag, subfield code or indicator.

Enter/Edit Items Menu Functions

The following functions are available in the Enter/Edit Items screen:

Add Allows you to add a new title or a new copy of a title.

When you select the Add function, a menu appears asking whether you want to add a new Title or a new Copy. Select Title if you are adding the first copy of a new title. Select Copy if you are adding an additional copy of the item displayed on the screen.

Do not use Add/Title to add additional copies of a title. Use Add/Copy.

The Add/Copy function is available only when an inventory item is displayed in the Inventory Records window. If you want to add an additional copy of an existing title, use Fine, List, Next or Previous to locate and display the item and then select Add/Copy.

When adding a copy, you are asked only to enter information in the Copy Information section of the window.

Find Allows you to find an inventory record based on any of the sorted/searchable fields. You can search on any field that has been set as sorted/searchable using the MARC Tags feature of the Maintenance/System Setup menu.

Simple MARC View

When in Simple MARC view, you are asked to enter the barcode number. If you want to search by another field, leave the barcode number blank and press ENTER. You will then be asked to enter the author.

Enter the author name (last name first) or first few letters of the last name and press ENTER or leave this field blank if you want to search by another field and press ENTER. You will then be asked to enter the title.

Enter the title or first few letters of the title and press ENTER. Leave this field blank and press ENTER if you want to search by call number.

If you are searching by call number, type the call number or the first few letters and numbers and press ENTER. Leave this field blank and press ENTER or ESC if you want to return to the menu.

Full and Abbreviated MARC Views

When in Abbreviated or Full MARC view, you are asked to enter the MARC field tag for the search field. If you do not remember the field tag number, press the F10 key to see and select from a list of searchable field tags. Press ESC if you want to return to the menu.

You are then asked to enter the search field. enter the author name, title, call number, barcode number, etc.

When searching by title, regardless of the view, you may omit the initial articles, "A," "An" and "The." They are ignored when searching for titles.

Surpass/2 does not pay attention to upper- and lowercase. Therefore, it does not matter how you capitalize the search field.

You do not need to enter the entire search field. Usually, just the first few letters will be enough to find the record. For example, if you search for the title, "Space," *Surpass/2* will find the first title that begins with "Space," "A space" or "The space." You can then use the

List, Next or Previous functions to see other matching titles.

Edit Enters the editing mode. This allows you to make any changes to the inventory record. The method used for editing depends on the whether you are displaying records in Simple, Abbreviated or Full MARC.

The Edit function is available only when a record is displayed on the screen. If you want to make changes to a record which is not currently displayed, use the Find, List, Next or Previous functions to locate and display the record, then select Edit to make changes to it.

Delete Allows you to delete the currently displayed record.

You will be asked whether you want to delete the currently displayed record. If you answer "yes," the record will be permanently removed. If you answer "no," the record will not be deleted.

Delete will remove only the currently displayed copy of an item if there is more than one copy (it will not delete other copies). If there is only one copy of the item, the entire MARC record will be deleted. When deleting, always check the barcode number to make sure you are deleting the correct copy.

Surpass/2 will not allow you to delete items which are currently checked out. If you attempt to delete such an item, *Surpass/2* will display a dialog box telling you that the item cannot be deleted at this time. You must first check in the item using the Circulation Transactions screen or declare the item lost using the Lost & Found screen before it can be deleted.

The Delete function is available only when a record is displayed on the screen. If you want to remove a record which is not currently displayed, use the Find, List, Next or Previous functions to locate and display the record, then select Delete to remove it.

ListDisplays a list of inventory items and allows you to select an item from the list.

You may select a record to display by using the arrow keys and the PGUP and PGDN keys to scroll through the list and position the highlight (underline on monochrome monitors) on the record. Press the ENTER key to display the record in the Inventory Records window.

The fields displayed in the List window and the order of the records is determined by your last use of the Find function. If you found a record by title, for example, the list will be displayed in title order.

Press the ESC key if you do not want to select a record from the list.

ViewAllows you to change the way a record is displayed.

When you select View, a menu appears allowing you to select "Full MARC," "Abbreviated MARC" or "Simple MARC" views.

If the current view is Abbreviated or Full MARC, you will also be allowed to select Next Page and Prev Page to display the next or previous "page" of the MARC record.

A shortcut key is displayed to the right of each item in the View menu. You can use these keys to immediately switch from one view to another without using the View function. For example, you can switch to Full MARC view by pressing the F5 key--you do not have to select View from the Enter/Edit Items menu and then Full MARC from the View menu.

NextDisplays the next inventory record.

You can also display the next record using the down arrow shortcut key.

PreviousDisplays the previous inventory record.

You can also display the previous record using the up arrow shortcut key.

Exit Returns to the Inventory menu.

The ESC key can be used to highlight Exit. If you press the ESC key when Exit is highlighted, you will be returned to the Inventory menu. Therefore, you can press ESC twice as a shortcut to the Inventory menu.

Cross References

If your *Surpass/2* system includes *Surpass/2 Catalog* public card catalog software, you might want to use cross-reference "cards." The Inventory menu's Cross References feature allows you to add, edit, delete and print subject heading and author "see" and "see also" cross references much as you would in a traditional card catalog. If you do not have *Surpass/2 Catalog*, you may skip this section.

These cross references are checked when patrons use *Surpass/2 Catalog* to search for books (or other items) by author or subject heading. For instance, if a patron is searching for the author, "Twain," he or she might see a cross reference that says "See also Clemens, Samuel L."

When you installed *Surpass/2*, you were given the option to install a pre-packaged set of cross references based on Sears subject headings. If you chose to install these, you may still add your own and edit or remove any of those that were automatically installed.

When you select Cross References from the Inventory menu, a menu will appear with the following features:

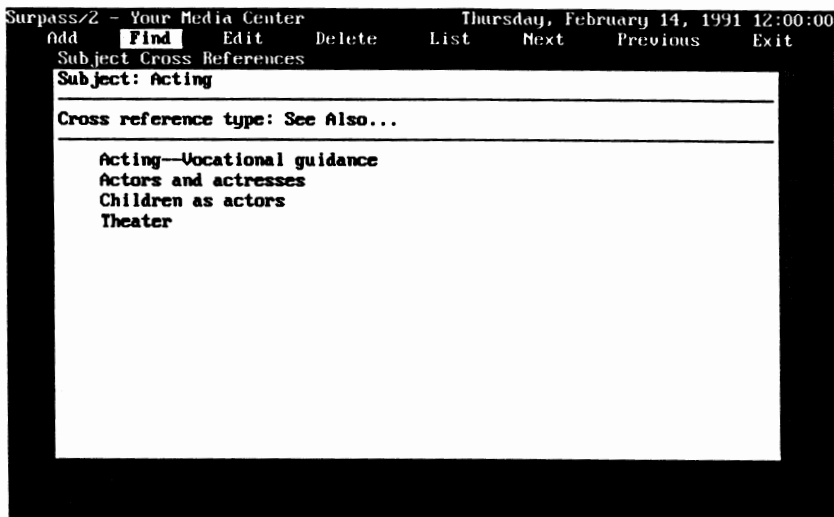
Subject Cross ReferencesAllows you to add, remove or make changes to existing subject "see" and "see also" cross references.

Author Cross References.....Allows you to add, remove or make changes to existing author "see" and "see also" cross references.

List of Cross ReferencesAllows you to print a list of subject and/or author cross references.

Subject Cross References

When you select Subject Cross References from the Cross References menu, you will see a blank window and a menu of functions.



Subject Cross References editing window

Subject Cross References Fields

The Subject Cross References Window has two one-line fields and one 15-line field:

Subject..... The main entry subject of the cross reference. If, for example, this were a "Cars see Automobiles" cross reference, the subject "Cars" would be entered into this field.

Type..... The type of the cross reference ("see" or "see also"). When adding new cross references, enter an `S' in this field if you are adding a "see" cross reference. Enter an `A' in this field if you are adding a "see also" cross reference.

Entries The bottom section of the window contains a single entry for a "see" cross reference or up to 15 entries for a "see also" cross reference.

For example, the cross reference "Cars see Automobiles" would have the subject "Automobiles" in this field. "See also" cross references would have one or more subject headings in this field.

If there are more than 15 "see also" cross references for a single subject, you can add as many cross reference records as needed (with up to 15 entries each).

Subject Cross References Menu Functions

The following functions are available in the Subject Cross References screen:

Add.....Clears the Cross References window and allows you to enter information for a new "see" or "see also" cross reference.

The fields where you may type are displayed as violet boxes (underlines on monochrome monitors). You may use any of the editing keys explained in the Using the Keyboard section of this manual to move from one field to another and to correct typing mistakes.

Find.....Clears the Cross References window and allows you to find a cross reference by its main entry subject heading.

You are asked to enter a subject in the Subject field. Type the subject or the first few letters of the subject and press ENTER.

If the cross reference record is found, it will be displayed in the Cross References window. Otherwise, a dialog box will appear telling you that it could not be located. Press any key to make the dialog box disappear.

If you cannot find a record and are sure you did not make a typing mistake, try searching using fewer letters of the subject heading (perhaps it was entered into the file incorrectly). Or, use the List function to display a list of all cross references on the screen.

Edit.....Allows you to make changes to the currently displayed cross reference.

The Edit function is available only when a cross reference record is displayed in the Cross References window. To edit a cross reference record not currently

displayed on the screen, use the Find, List, Next or Previous functions to locate and display the record.

The fields where you may type are displayed as violet boxes (underlines on monochrome monitors). You may use any of the editing keys explained in the Using the Keyboard section of this manual to move from one field to another and to correct typing mistakes.

The Cross Reference Type field cannot be edited. If you want to change a cross reference from "see" to "see also" or vice-versa, you must first delete the old cross reference (see Delete) and add a new one with a different. It is possible to have both a "see" and a "see also" record for the same subject.

Delete..... Allows you to permanently remove the currently displayed cross reference.

Before the record is removed, you are asked whether you want to delete the current record. If you answer "no," the record will not be removed.

The Delete function is available only when a cross reference is displayed in the Cross References window. To delete a record not currently displayed on the screen, use the Find, List, Next or Previous functions to locate and display the record.

If you delete a "see also" cross reference that was entered using more than one window (as is the case when you must enter more than 15 "see also" entries), all related "see also" cross references will be removed. That is, all "see also" references having the exact same main entry subject as the one you are deleting will be also be deleted.

List..... Displays a window listing all the main entries and cross reference types.

You may select a record to display by using the arrow keys and the PgUP and PgDN keys to scroll through the list and position the highlight (underline on monochrome

monitors) on the record. When the highlight is on the record, press the ENTER key to display that cross reference on the screen.

Press the ESC key if you do not want to select a cross reference from the list.

Next.....Displays the next cross reference record or the first record if no record is currently displayed.

PreviousDisplays the previous cross reference record or the last record if no record is currently displayed.

Exit.....Returns to the Cross References menu.

Author Cross References

When you select Author Cross References from the Cross References menu, you will see a blank window and a menu of functions.

The fields and available functions are the same as those used to add, find, edit and delete subject cross references. See the previous section, "Subject Cross References."

List of Cross References

The List of Cross References feature of the Cross References menu allows you to print a list of author and/or subject "see" and "see also" cross references.

When you select this feature, a window appears asking which types of cross references you want to print:

SubjectPut a `Y' (yes) in this field if you want to print subject cross references. Put an `N' (no) in this field if you do not want to print subject cross references.

AuthorPut a `Y' (yes) in this field if you want to print author cross references. Put an `N' (no) in this field if you do not want to print author cross references.

If you selected to print both types of cross references, they will print as separated reports: author cross references will be listed first followed by subject cross references.

After you have entered a `Y' or `N' on both fields, you will be asked whether you are ready to continue. If you answer "no," you will be allowed to go back and change your selections.

You will then be asked to load the proper type of paper in your printer and to put your printer on-line. Press any key to begin printing the report.

Labels & Cards

The Labels & Cards feature of the Inventory menu allows you to print barcoded labels for inventory items, spine labels and catalog card sets. When you select Labels & Cards from the Inventory menu, the Labels & Cards menu appears:

Barcode Labels Prints barcoded labels for one or more inventory items.

Pre-Print Barcode .. Prints barcoded labels for items which have not yet been entered into the computer.

Catalog Cards Prints card catalog sets.

Spine Labels..... Prints spine labels for one or more books.

Barcode Labels

The Barcode Labels feature of the Inventory Labels & Cards menu allows you to print barcoded labels for one or more inventory items. Each barcode label contains the local call number (MARC Field 900), the title (Field 245), the barcode number (Field 901) and the barcode itself.

When you select Barcode Labels, a window appears to ask you for the sort order, range, number of labels to print for each item and the size of the labels.

```

Surpass/2 - Your Media Center          Thursday, February 14, 1991 12:00:00
Inventory      Patrons      Circulation      Maintenance      Exit
Enter/Edit Items
Cross References
Labels & Cards
Barcode Labels
Sort field: 901 Barcode number
Range field: 901 Barcode number
Start with: 10001
End with: 10025
-----
Number of labels to print for each item: 1
Label length in lines (6 lines-per-inch): 6
-----
Call Number Format
Include first three letters of author name . . . Yes
Start new line after space . . . . .
Start new line after decimal point . . . . .

Are you ready to continue? YES NO

```

Inventory / Print Barcode Labels window

The Barcode Labels window asks for the following:

Sort Field..... This contains a MARC tag number telling *Surpass/2* how you want the labels to be sorted.

You can sort the labels by any *sortable* MARC field. This usually includes 100 (author), 245 (title statement), 900 (local call number) and 901 (barcode number). For more information about sortable MARC fields, refer to the MARC Tags feature of the Maintenance / System Setup menu starting on Page 195.

If you don't remember the MARC field tag number, press the F10 key when the cursor is in the Sort field. A list of sortable MARC fields will appear. Use the arrow keys to select a field and press ENTER to sort by that field.

Example: To print labels in barcode number order, enter "901" (the MARC field that contains barcode numbers) in the Sort field.

Range Field This contains a MARC tag number telling *Surpass/2* how you want to select which labels to print.

Unlike the Sort field, the Range field does not have an effect on the order in which the items are printed. Together with the Start With and End With fields, it simply allows you to specify a range of items for which to print barcode labels.

The range field can be any MARC field. If you don't remember the MARC field tag number, press the F10 key when the cursor is in the Range field. A list of all MARC fields will appear. Use the arrow keys to select a field and press ENTER to use that field for the range.

Example: To print barcode labels for only the barcode numbers 1000 through 2000 and have the barcode labels sorted by call number, you would enter "900" (call number) in the Sort field and "901" (barcode) in the Range field. You would then use the Start With and End With fields to specify a barcode number range.

Leave the Range field blank if you want to print labels for all items.

When *Surpass/2* is printing barcode labels, it goes through *every* item inventory by the order you specified in the Sort field. It checks each item to see if it falls within the range you selected. If it does, a label is printed. Otherwise, *Surpass/2* skips over the inventory item and moves on to the next. Therefore, even if you're printing labels for a small range of items, the computer could be busy for quite some time selecting the items to be printed.

The exception to the above is when the Sort field and Range fields are the same. In that case, *Surpass/2* quickly skips over all the items that are not within the range and can print the labels much faster.

Start With This field contains the first item to print based on the Range field.

In the above example, you would enter "900" (call number) in the Sort field, "901" (barcode) in the Range field and "1000" in the Start With field.

End With..... This field contains the last item to print based on the Range field.

In the above example, you would enter "900" (call number) in the Sort field, "901" (barcode) in the Range field, "1000" in the Start With field and "2000" in the End With field.

Number of Labels ... This field contains the number of labels you want to print for each barcode number.

Some media centers prefer to have two labels on each book. One on the outside for fast check outs and for taking inventory and one on the inside as a "backup" should the outside label be damaged. In this case, you would enter `2' in the Number of Labels field and two labels will be printed for each barcode number.

Label Length..... The length of the barcode labels in lines. Barcode labels are printed with six lines to one inch. You cannot adjust the label length if you are using a laser printer.

Most barcode labels are one inch long (measured from the top of one label to the top of the next), therefore you would enter a `6' in the Label Length field.

If your barcode labels are 1-1/2" long, you would enter a `9' in this field (1-1/2" x 6 = 9).

Labels shorter than one inch are not supported.

Additionally, the Barcode Labels window asks if you want to include the first three letters of the author's name on the call number. If you answer "yes" to this question by typing `Y', the call numbers printed on the barcode labels will end with the first three letters of the author's name (as

stored in MARC Field 100a). Answering "no" will not affect call numbers that were entered using the last three letters of the author's name.

Use the arrow and editing keys to make changes in this window. When you are finished, or if you don't want to change the default values, press the PGDN key.

You will be asked if you are ready to begin. If you answer "no," you will be allowed to make further changes to the information in the Barcode Labels window.

After you have finished making any changes to the Barcode Labels window, a dialog box will appear asking if you want to print a sample for alignment. If you answer "yes," a sample label will be printed and you will be given the opportunity to print another sample.

It is a good idea to print one or two sample labels to make sure the printed text and barcodes are properly centered on the label and that the spacing between labels is correct. If the alignment is not correct, you can adjust the label stock in your printer and continue to print samples until everything is in alignment. If the spacing between labels is not correct, make sure the number you entered in the Label Length field is correct for the size label you are using.

The barcode labels will begin printing when you answer no to the "Do you want to print a sample for alignment?" question.

Depending on the Sort and Range fields, your printer may or may not begin printing immediately. If the Sort and Range fields are the same, though, the labels will begin printing almost immediately.

Press the ESC key if you want to stop printing before the labels have finished printing. You will be asked whether or not you want to continue printing. If you answer "Yes," *Surpass/2* will resume printing. Otherwise, you will be returned to the Labels & Cards menu.

Pre-Print Barcode Labels

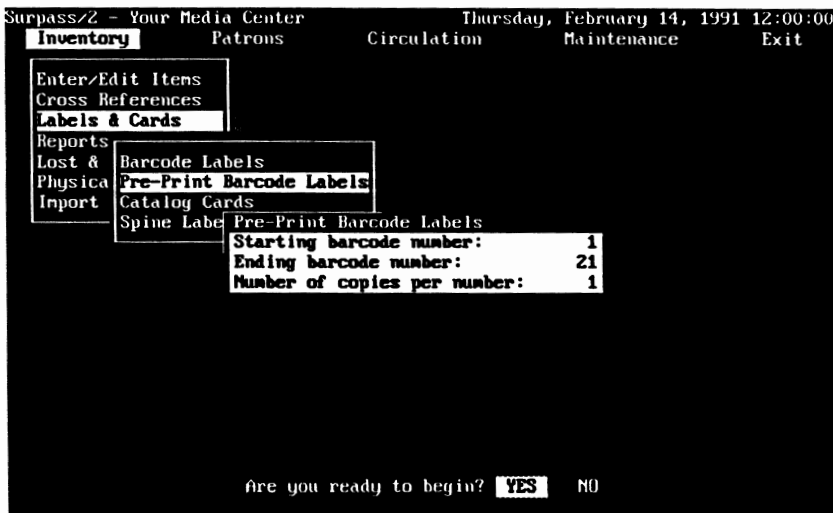
The Pre-Print Barcode Labels feature of the Inventory Labels & Cards menu allows you to print barcoded labels for items which have not yet been entered into the computer. This is mainly useful for circulating items

that are not normally entered into inventory such as magazines and vertical file folders.

By having a set of pre-printed barcode labels available at your circulation desk, you can attach them to non-inventoried items as they are checked out. When the Circulation Transactions window is given a barcode number which is not in inventory, it allows you to enter the title of the item at the time of check-out and the item is added to the inventory at that time.

Each barcode label contains a barcode number and the barcode itself. Titles and call numbers are not printed on the labels because the item has not yet been entered into inventory or assigned a barcode number.

When you select Pre-Print Barcode Labels, a window appears to ask you for the range of barcode numbers to print, the number of labels to print for each item and the size of the labels.



Inventory / Pre-Print Barcode Labels window

The Pre-Print Barcode Labels window asks for the following:

Starting Number The barcode number of the first label to print.

Ending Number The barcode number of the last label to print.

For example, to pre-print labels for barcode numbers 5001 through 5100, you would enter "5001" in the

Starting Number field and "5100" in the Ending Number field.

Number of Labels ... This field contains the number of labels you want to print for each barcode number.

Label Length..... The length of the barcode labels in lines. Barcode labels are printed with six lines to one inch. You cannot adjust the label length if you are using a laser printer.

Most barcode labels are one inch long (measured from the top of one label to the top of the next), therefore you would enter a `6' in the Label Length field.

If your barcode labels are 1-1/2" long, you would enter a `9' in this field (1-1/2" x 6 = 9).

Labels shorter than one inch are not supported.

Use the arrow and editing keys to make changes in this window. When you are finished, or if you don't want to change the default values, press the PGDN key.

You will be asked if you are ready to begin. If you answer "no," you will be allowed to make further changes to the information in the Pre-Print Barcode Labels window.

After you have finished making any changes to the Pre-Print Barcode Labels window, a dialog box will appear asking if you want to print a sample for alignment. If you answer "yes," a sample label will be printed and you will be given the opportunity to print another sample.

It is a good idea to print one or two sample labels to make sure the printed text and barcodes are properly centered on the label and that the spacing between labels is correct. If the alignment is not correct, you can adjust the label stock in your printer and continue to print samples until everything is in alignment. If the spacing between labels is not correct, make sure the number you entered in the Label Length field is correct for the size label you are using.

The barcode labels will begin printing when you answer no to the "Do you want to print a sample for alignment?" question.

Press the ESC key if you want to stop printing before the labels have finished printing. You will be asked whether or not you want to continue printing. If you answer "Yes," *Surpass/2* will resume printing. Otherwise, you will be returned to the Labels & Cards menu.

Note: Barcode numbers printed using Pre-Print Barcode Labels are not added to the inventory when they are printed. Therefore, you should take care to not use these barcode numbers for other books and inventory items you add. Also, the Pre-Print Barcode Labels does not check to see that the barcode numbers printed have not already been assigned to books. It is therefore a good idea to reserve a range of barcode numbers for the specific purpose of using pre-printed barcodes. Then make sure that any books you add have barcode numbers higher than or lower than this range.

Remember that if you allow *Surpass/2* to automatically assign barcode numbers for you as you are adding books it will give the new book a barcode number which is equal to one plus the highest barcode number in use. You would not want to allow it to do this if the barcode number it assigns will fall into the range of any pre-printed barcode labels.

Catalog Cards

The Catalog Cards feature of the Inventory Labels & Cards menu allows you to print catalog card sets for books. Card sets can include any number of copies of main entry cards, author cards, title cards and/or subject cards.

Catalog cards are normally printed on 3" x 5" standard catalog card stock, but *Surpass/2* can support most other sizes as well.

Catalog cards can be printed only on dot-matrix printers since laser printers are not able to handle the thick card stock needed for catalog cards.

When you select Catalog Cards, a window appears to ask you for the sort order, range, the size of the card stock and the types of the cards you want to print.

For Position Only

Catalog Cards window

The Catalog Cards window asks for the following:

Sort Field This contains a MARC tag number telling *Surpass/2* how you want the cards to be sorted.

You can sort the cards by any *sortable* MARC field. This usually includes 100 (author), 245 (title statement), 900 (local call number) and 901 (barcode number).

If you don't remember the MARC field tag number, press the F10 key when the cursor is in the Sort field. A list of sortable MARC fields will appear. Use the arrow keys to select a field and press ENTER to sort by that field.

Example: To print catalog cards in barcode number order, enter "901" (the MARC field that contains barcode numbers) in the Sort field.

Range Field This contains a MARC tag number telling *Surpass/2* the type of range you want to use to select which books' card should be included.

Unlike the Sort field, the Range field does not have an effect on the order in which the books' cards are printed. Together with the Start With and End With fields, it simply allows you to specify a range of items for which to print catalog cards

The range field can be any MARC field. If you don't remember the MARC field tag number, press the F10 key when the cursor is in the Range field. A list of all MARC fields will appear. Use the arrow keys to select a field and press ENTER to use that field for the range.

Example: To catalog cards for only the barcode numbers 1000 through 2000 and have the card sets sorted by call number, you would enter "900" (call number) in the Sort field and "901" (barcode) in the Range field. You would then use the Start With and End With fields to specify a barcode number range.

Leave the Range field blank if you want to print labels for all items.

When *Surpass/2* is printing catalog card sets, it goes through *every* item inventory by the order you specified in the Sort field. It checks each item to see if it falls within the range you selected. If it does, a card set is printed. Otherwise, *Surpass/2* skips over the inventory item and moves on to the next. Therefore, even if you're printing cards for a small range of items, the computer could be busy for quite some time selecting the items to be printed.

The exception to the above is when the Sort field and Range fields are the same. In that case, *Surpass/2* quickly skips over all the items that are not within the range and can print the labels much faster.

Start With This field contains the first item to print based on the Range field.

For example, to print items *sorted* by barcode number using a barcode number *range* of 1000 through 2000, you would enter "901" (barcode number) in the Sort field, "901" (barcode number) in the Range field and "1000" in the Start With field.

End With..... This field contains the last item to print based on the Range field.

In the above example, you would enter "2000" (the last barcode number to print) in the End With field.

Card Width..... The width of the card in inches.

Standard catalog cards are 5" wide. Therefore, to print on a standard card, you would enter "5" in this field.

You may print on card stock ranging from 4"- to 9-3/4" (9.75") wide by entering the actual width of the card in this field. You may include the fractional widths 1/4" (.25), 1/2" (.50) and 3/4" (.75).

Left Margin..... The width of the left margin in inches.

Some cards have an area on the left (and/or right) of the card stock which is torn off after the cards are printed. You use this field to enter the width of this margin so that *Surpass/2* will skip over this area.

For example, to tell *Surpass/2* that your card stock has a 1" tear-off margin, you would enter "1" in this field. As with the Card Width field, you can include the decimals .25, .50 and .75.

Card Length..... The length of the catalog card in lines. Catalog cards are printed with eight lines to one inch.

The printable area of most catalog cards are 3" long, therefore you would enter "24" in this field (3 x 8 = 24).

If your catalog cards are 4-1/2" long, you would enter "36" in this field ($4\text{-}1/2 \times 8 = 36$)

Cards lengths may range from 3" (24 lines) to 10" (80 lines).

Bottom Margin..... The length, in lines, of the unprintable area at the bottom of the card.

Most catalog cards have a notch or a hole in the bottom of the card to hold the cards in the drawers. You use the Bottom Margin field to tell *Surpass/2* that it shouldn't print in this area.

For example, if the card stock you are using has a hole that is 1/2" from the bottom of the card, you would want to tell *Surpass/2* that it shouldn't print in this area of the card. Since there are eight lines in one inch, you would enter `4' in this field ($1/2 \times 8 = 4$).

The Bottom Margin subtracts from the number of printable lines on the card. For example, if you entered "24" (3") in the Card Length field and "4" (1/2") in the Bottom Margin field, the maximum number of lines that can print on the card would be 20 ($24 - 4 = 20$).

Main Entry Cards... The number of main entry cards to print for each title.

Main entry cards are usually author or title cards and are usually used only in your shelf list.

You may enter any number from 0 (telling *Surpass/2* to print no main entry cards) to 9 in this field.

Author Cards The number of author cards to print for each title. This can range from 0 to 9.

Title Cards The number of title cards to print for each title. This can range from 0 to 9.

Subject Cards..... The number of subject cards to print for each subject in each title. This can range from 0 to 9.

Use the arrow and editing keys to make changes in this window. When you are finished, or if you don't want to change the default values, press the PGDN key.

You will be asked if you are ready to begin. If you answer "no," you will be allowed to make further changes to the information in the Catalog Cards window.

After you have finished making any changes, a dialog box will appear asking if you want to print a sample card for alignment. If you answer "yes," a sample card will be printed and you will be given the opportunity to print another sample.

It is a good idea to print one or two samples to make sure the printed text is properly centered on the card and that the spacing between cards is correct. If the alignment is not correct, you can adjust the card stock in your printer and continue to print samples until everything is in alignment. If the spacing between cards is not correct, make sure the numbers you entered in the Card Length and Bottom Margin fields are correct for the cards you are using.

The catalog cards will begin to print when you answer no to the "Do you want to print a sample for alignment?" question.

Press the ESC key if you want to stop printing before the cards have finished printing. You will be asked whether or not you want to continue printing. If you answer "Yes," *Surpass/2* will resume printing. Otherwise, you will be returned to the Labels & Cards menu.

Spine Labels

The Spine Labels feature of the Inventory Labels & Cards menu allows you to print spine labels for books. Each spine label contains the item's local call number (MARC Field 900) and its barcode number (Field 901).

Spine labels are printed two-across on 1-1/2"-wide labels or three-across on 1"-wide labels on dot-matrix printers. On laser printers, they are printed three-across using the same label stock used for barcode labels.

When you select Spine Labels, a window appears to ask you for the sort order, range, number of labels to print for each item and the size of the labels.

```
Surpass/2 - Your Media Center          Thursday, February 14, 1991 12:00:00
Inventory      Patrons      Circulation      Maintenance      Exit
Enter/Edit Items
Cross References
Labels & Cards
Spine Labels
Sort field: 901 Barcode number
Range field: 901 Barcode number
Start with: 10020
End with: 10050
-----
Number of labels to print for each item: 1
Label length in lines (6 lines-per-inch): 6
Call Number Format
Include first three letters of author name . . Yes
Start new line after space . . . . . Yes
Start new line after decimal point . . . . . No

Are you ready to continue?  YES  NO
```

Inventory / Spine Labels window

The Spine Labels window asks for the following:

Sort Field..... This contains a MARC tag number telling *Surpass/2* how you want the labels to be sorted.

You can sort the labels by any *sortable* MARC field. This usually includes 100 (author), 245 (title statement), 900 (local call number) and 901 (barcode number). For more information about sortable MARC fields, refer to the MARC Tags feature of the Maintenance / System Setup menu starting on Page 195.

If you don't remember the MARC field tag number, press the F10 key when the cursor is in the Sort field. A list of sortable MARC fields will appear. Use the arrow keys to select a field and press ENTER to sort by that field.

Example: To print labels in call number order, enter "900" (the MARC field that contains local call numbers) in the Sort field.

Range Field..... This contains a MARC tag number telling *Surpass/2* how you want to select which labels to print.

Unlike the Sort field, the Range field does not have an effect on the order in which the items are printed. Together with the Start With and End With fields, it simply allows you to specify a range of items for which to print spine labels.

The range field can be any MARC field. If you don't remember the MARC field tag number, press the F10 key when the cursor is in the Range field. A list of all MARC fields will appear. Use the arrow keys to select a field and press ENTER to use that field for the range.

Example: To print labels for only the barcode numbers 1000 through 2000 and have the labels sorted by call number, you would enter "900" (call number) in the Sort field and "901" (barcode) in the Range field. You would then use the Start With and End With fields to specify a barcode number range.

Leave the Range field blank if you want to print labels for all items.

When *Surpass/2* is printing spine labels, it goes through *every* item inventory by the order you specified in the Sort field. It checks each item to see if it falls within the range you selected. If it does, a label is printed. Otherwise, *Surpass/2* skips over the inventory item and moves on to the next. Therefore, even if you're printing labels for a small range of items, the computer could be busy for quite some time selecting the items to be printed.

The exception to the above is when the Sort field and Range fields are the same. In that case, *Surpass/2* quickly skips over all the items that are

not within the range and can print the labels much faster.

Start With This field contains the first item to print based on the Range field.

In the above example, you would enter "900" (call number) in the Sort field, "901" (barcode) in the Range field and "1000" in the Start With field.

End With This field contains the last item to print based on the Range field.

In the above example, you would enter "900" (call number) in the Sort field, "901" (barcode) in the Range field, "1000" in the Start With field and "2000" in the End With field.

Number of Labels ... This field contains the number of labels you want to print for each item.

Label Length The length of the spine labels in lines. Barcode labels are printed with six lines to one inch. You cannot adjust the label length if you are using a laser printer.

Most spine labels are 2" long (measured from the top of one label to the top of the next), therefore you would enter "12" in the Label Length field.

If your spine labels are 1-1/2" long, you would enter a `9' in this field ($1\text{-}1/2" \times 6 = 9$).

Labels shorter than one inch are not supported.

Num. Labels Across The number of spine labels across the width of the label form. This field can contain either a 2 or a 3 when printing on dot-matrix printers. It cannot be adjusted when printing on laser printers.

Most spine labels are 3 labels across. 2" long (measured from the top of one label to the top of the

next), therefore you would enter "12" in the Label Length field.

The bottom portion of the Spine Labels window asks questions about the appearance of call numbers printed on the spine labels. There are three yes-or-no questions:

- **Include first three letters of author name.**

Answer "yes" if you want the first three letters of the author's name to appear after the call number.

If the local call number already ends with the first three letters of the author's name (as is often the case with fiction books), the three letters will be printed regardless of how you answer this question.

- **Start new line after space.**

Answer "yes" if you want the call number to break and continue to print on the next line after each space.

For example, if you want the call number, F BAC to be printed with the "F" on the top line and "BAC" on the next, you would answer "yes" to this question.

- **Start new line after decimal point.**

Answer "yes" if you want the call number to break and continue printing on the next line after the decimal point.

For instance, if you want the call number, 500.01 to be printed with the "500" on the top line and ".01" on the next, you would answer "yes" to this question.

Use the arrow and editing keys to make changes in this window. When you are finished, or if you don't want to change the default values, press the PGDN key.

You will be asked if you are ready to begin. If you answer "no," you will be allowed to make further changes to the information in the Spine Labels window.

A dialog box will appear asking if you want to print a sample for alignment. If you answer "yes," a sample label will be printed and you will be given the opportunity to print another sample.

It is a good idea to print one or two sample labels to make sure the printed text is properly centered on the label and that the spacing between labels is correct. The call number is printed using the top lines of the label and the barcode number is printed in smaller type on the bottom line of the label. If the alignment is not correct, you can adjust the label stock in your printer and continue to print samples until everything is in alignment. If the spacing between labels is not correct, make sure the number you entered in the Label Length field is correct for the size label you are using.

The spine labels will begin printing when you answer no to the "Do you want to print a sample for alignment?" question.

Depending on the Sort and Range fields, your printer may or may not begin printing immediately. If the Sort and Range fields are the same, though, the labels will begin printing almost immediately.

Press the ESC key if you want to stop printing before the labels have finished printing. You will be asked whether or not you want to continue printing. If you answer "Yes," *Surpass/2* will resume printing. Otherwise, you will be returned to the Labels & Cards menu.

Reports

The Reports feature of the Inventory menu allows you to print reports of your inventory collection. When you select Reports from the Inventory menu, another menu appears:

Inventory List Prints a list of items in your inventory.

Purchasing Report.. Prints a list of items purchased within a specific date range and/or items purchased with a specific source of funding.

Dewey Divisions Prints a list of each Dewey decimal division, the number of titles and volumes in each division and circulation statistics for each division.

Category Count..... Prints a list of each circulation category, the number of titles and volumes in each category and circulation statistics for each category.

Subject Count Prints a list of subject headings and the number of titles for each subject.

Inventory List

The Inventory List feature of the Inventory:Reports menu allows you to print a list of inventory items. You can specify a sort order for the report, a range of items to appear on the report and which MARC fields will appear on the report.

When you select Inventory List, a window appears to allow you to design the report.

Surpass/2 - Your Media Center Thursday, February 14, 1991 12:00:00

Inventory Patrons Circulation Maintenance Exit

Inventory Report

Sort field: 100 Personal name main entry
 Range field: 100 Personal name main entry
 Start with: A
 End with: Z

Paper width: Wide Narrow (8") / Wide (13")
 Type size: Elite Pica (10cpi) / Elite (12cpi) / Compressed (17cpi)

Field	Subfield	Width	Field	Subfield	Width
900 Local Call	All	16			
100 ME:PersNam	A Name	38			
245 Title	All	60			
901 Barcode	All	11			
DAT Acq Date		11			
FUN Acq Fund		11			
CDS Acq Cost		9			

Paper width: 156 Used: 156 Remaining: 0

Are you ready to begin? **YES** NO

Inventory List window

The Inventory List window is divided into two main sections. The top section allows you to specify how the report will be sorted, a range of items to appear on the report, the paper size to use and the type size. The bottom section allows you to select the MARC fields to appear on the report and the width of each column containing a field.

Sort Field..... This contains a MARC tag number telling *Surpass/2* how you want the items on report sorted.

You can sort the items on the report by any sortable MARC field. This usually includes 100 (author), 245 (title statement), 900 (local call number) and 901 (barcode number). For more information about sortable MARC fields, refer to the MARC Tags feature of the Maintenance / System Setup menu starting on Page 195.

If you don't remember the MARC field tag number, press the F10 key when the cursor is in the Sort field. A list of sortable MARC fields will appear. Use the arrow keys to select a field and press ENTER to sort by that field.

Example: To print a report in title order, enter "245" in the Sort field.

Range Field This contains a MARC tag number telling *Surpass/2* how you want to select a range of items to appear on the report.

Unlike the Sort field, the Range field does not have an effect on the order in which the items are printed. Together with the Start With and End With fields, it simply allows you to specify which items will appear on the report.

The range field can be any MARC field. If you don't remember the MARC field tag number, press the F10 key when the cursor is in the Range field. A list of all MARC fields will appear. Use the arrow keys to select a field and press ENTER to use that field for the range.

Example: To print a report of only the call numbers in the 500's through the 600's and have the report printed in title order, enter "245" (title) for the Sort field and "900" (local call number) in the Range field. You would then use the Start With and End With fields to specify a call number range.

Leave the Range field blank if you want to print all items.

When *Surpass/2* is printing items, it goes through *every* item inventory by the order you specified in the Sort field. It checks each item to see if it falls within the range you selected. If it does, it is printed. Otherwise, *Surpass/2* skips over the inventory item and moves on to the next. Therefore, even if you're printing a small range of items, the computer could be busy for quite some time selecting the items to be printed.

The exception to the above is when the Sort field and Range fields are the same. In that case, *Surpass/2* quickly skips over all the items that are not within the range and can print the report much faster.

Start With This field contains the first item to print based on the Range field.

In the above example, you would enter "245" (title) in the Sort field, "900" (local call number) in the Range field and "5" in the Start With field.

You do not have to enter the complete starting call number (or whatever) in the Start With field since *Surpass/2* will only pay attention to the number of characters (letters, digits, etc.) you enter in the field. In the example above, "5" in the Start Field means to print only items that begin with the digit '5' or greater.

End With This field contains the last item to print based on the Range field.

In the above example, you would enter "245" (title) in the Sort field, "900" (local call number) in the Range field, "5" in the Start With field and "6" in the End With field.

As with the Start With field, you do not have to enter the complete ending call number in the End With field since *Surpass/2* will only pay attention to the number of characters you enter in the field. In the example above, "6" in the End With field means to print only items that begin with the digit '6' or lesser.

Paper Width This field tells *Surpass/2* the size of the paper on which to print the report.

There are two sizes of paper available for dot-matrix printers: Narrow (8") and Wide (13"). Enter an `N' in this field to print on 8" paper or a `W' to print on 13" paper.

If you are using a laser printer such as the Hewlett-Packard LaserJet III, entering a `W' in the field will cause the report to be printed sideways along the length of a 8-1/2" by 11" sheet. In this case, the

"width" of the paper is 10" (1/2" is used for the left and right margins).

If you are using a laser printer and have a legal paper cartridge, you can also select a special "Legal+Wide" paper size by entering a `L' in the Paper Width field. This will cause the report to be printed sideways along the length of a 8-1/2" by 14" sheet. In this case, the "width" of the paper is 13" (1/2" is used for the left and right margins).

Type Size..... This field tells *Surpass/2* the size print to use when printing the report.

There are three type sizes available. The largest, Pica, prints 10 characters-per-inch. Elite prints 12 characters-per-inch and the smallest, Compressed, prints 17 characters-per-inch.

If you are using a laser printer, and do not have an Elite font cartridge, you will not be able to select Elite print. The Compressed print on laser printers is 16.66 characters-per-inch instead of 17.

The advantage to using a smaller type size, such as Elite or Compressed, is that you can print more information across the width of the report.

Enter a `P' in the Type Size field to select Pica, an `E' to select Elite or a `C' to select Compressed.

As you enter the Paper Width and Type Size, watch the "Paper Width" field at the very bottom of the window. This shows the width of the report in number of spaces (characters).

The bottom section of the Inventory List window is where you tell *Surpass/2* which fields you want to be printed on the report in columns. Your report may contain up to 20 columns. For each column, you specify the MARC field, subfield and column width in the following fields:

Field Contains the MARC field tag number of the field to print in the column. This may be any MARC field.

For example, to print the author's information in the column you would enter "100" (author).

If you do not remember the MARC field tag numbers, press the F10 key to select from a list.

There are six fields which are not a part of the MARC record. These special fields contain information specific to each individual copy of a title. The special fields have a three-letter name. Enter this name to print the contents of the special fields:

COS Contains the purchase price of the item.

DAT Contains the date the item was purchased.

FUN Contains the name of the fund used to purchase the item.

LOC Contains the location code (library branch or school) of the item. In most cases, this will be the same for all items.

STA Contains the circulation status of the item (In, Out, Lost or Reserved).

VEN Contains the code of the vendor from which the item was purchased.

Subfield Contains the subfield code of the MARC field to print.

Each MARC field contains one or more subfields. These subfields are different for each MARC field and contain specific parts of the MARC field. For example, the author's date of flourishing (dates of birth and death) is contained in subfield `D' of the 100 (author) field. To print the date of flourishing, you would enter "100" for the field and "D" for the subfield.

To print the entire contents of the field (all subfields), leave Subfield blank (or type a space over it).

To select from a list of valid subfields for the MARC field, press the F10 key.

The special fields, "COS," "DAT," "FUN," "LOC," "STA" and "VEN" do not have subfields because they are not a part of a standard MARC record. Therefore, you should leave the subfield blank for these special fields.

Width Contains the width of the column in spaces.

The minimum column width is 5 spaces, but you will probably want much wider columns for most fields. For example, you would want a fairly wide column with for the title field (245). To make the title column 50 spaces wide, you would enter "50" in the Width field for the title column.

One space of the column width is used to separate one column from the next. For instance, if you entered "50" for the title column width, 49 spaces will actually be used for the title and the 50th space would be used to separate the title column from the next column.

As you are entering column widths, watch the bottom line of the window. This line shows the number of spaces available (determined by the paper width and type size), the number of spaces you have used so far and the number of spaces remaining. If the number of spaces remaining is negative, you have used too many spaces and should shorten some of the column widths, remove some fields, use a wider paper size and/or use a smaller type size.

Press the PGDN key when you are finished designing your report. You will be asked whether you are ready to begin. If you want to make more changes in the report design, answer "No" and you will be allowed to continue editing the report design. Otherwise, answer "Yes."

If you have made changes to the report design, you will be asked whether you want to save this report design. If you answer "Yes," the changes you made will be saved and will appear each time you select Inventory List. Since you will probably put a great deal of thought into the design of the report, you will probably want to save it as the default report. Then, later, you can use the same design and/or make small changes in it.

Finally, you will be asked to get your printer ready by loading it with the proper size paper and setting it to the top of the page. Press any key when you're ready and the report will begin compiling and printing.

Depending on the Sort and Range fields, your printer may or may not begin printing immediately. If the Sort and Range fields are the same, though, the report will begin printing almost immediately.

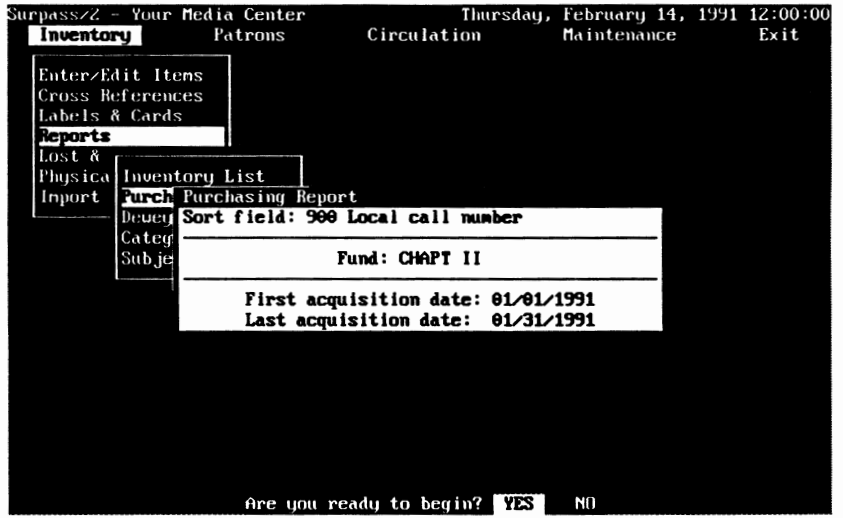
Press the ESC key if you want to stop printing before the report is finished. You will be asked whether or not you want to continue printing. If you answer "Yes," *Surpass/2* will resume printing. Otherwise, you will be returned to the Inventory Reports menu.

Note: If the contents of a field is longer than the width of the column, the remainder of the field will be printed on one or more additional lines beneath the column. For this reason, each individual inventory item on the report is separated by a blank line (it is double spaced).

Purchasing Report

The Purchasing Report feature of the Inventory Reports menu allows you to print a list of items purchased within a specific date range and/or items purchased using a specific funding source.

When you select Purchasing Report, a window is displayed asking you for the sort order, purchase date range and fund name.



Purchasing Report window

Sort Field Contains the MARC field tag of the field to use to sort the report.

You can sort the items on the report by any sortable MARC field. This usually includes 100 (author), 245 (title statement), 900 (local call number) and 901 (barcode number). For more information about sortable MARC fields, refer to the MARC Tags feature of the Maintenance / System Setup menu starting on Page 195.

If you don't remember the MARC field tag number, press the F10 key when the cursor is in the Sort field. A list of sortable MARC fields will appear. Use the arrow keys to select a field and press ENTER to sort by that field.

For example, to print a report sorted by local call number, you would enter "900" (local call number) in the Sort field.

Fund Tells *Surpass/2* which items to print based on the funding source used to purchase the item.

Fund codes are entered in the Enter/Edit Items window when new inventory items are added. They are also entered when the Inventory Import feature is used to read MARC or MicroLIF records from floppy disks.

Leave this field blank if you want to print all items regardless of the funding source used to purchase the items.

For example, if you used "PTA" to denote items purchased with PTA funds, you would enter "PTA" in the Fund field to print only those items purchased with PTA money.

First Date Specifies the first purchase date to use when selecting items to print on the report.

For example, if you want to print items purchased on or after January 10, 1992, you would enter "01/10/1992" in the First Date field.

Last Date Specifies the last purchase date to use when selecting items to print on the report.

For example, to print items purchased between January 10, 1992 and February 28, 1992, you would enter "01/10/1992" in the First Date field and "02/28/1992" in the Last Date field.

After you enter the Last Acquisition Date, you will be asked whether you are ready to begin. If you answer "No," you will be allowed to make changes to the Sort, Fund, First Acquisition Date and Last Acquisition Date fields.

Finally, you will be asked to get your printer ready by loading it with the proper size paper and setting it to the top of the page. Press any key when you're ready and the report will begin compiling and printing.

Since *Surpass/2* must "look at" each item in your inventory to determine whether it falls within the date range and fund, your printer may or may not begin printing immediately.

Press the ESC key if you want to stop printing before the report is finished. You will be asked whether or not you want to continue printing. If you answer "Yes," *Surpass/2* will resume printing. Otherwise, you will be returned to the Inventory Reports menu.

The Purchasing Report contains the following columns:

- Call Number** The local call number used in your library and contained in MARC field 900a.
- Author Name** The author's name contained in MARC field 100a.
- Title** The first part of the title statement contained in MARC field 245a.
- Barcode** The barcode number contained in MARC field 901a.
- Date** The date the item was purchased.
- Fund** The funding source used to purchase the item.
- Vendor** The code of the vendor from which item was purchased.
- Cost** The price paid for the item. The total cost of all printed items is printed at the bottom of the last page.

Dewey Divisions

The Dewey Divisions report prints a summary of each Dewey decimal division (100's, 200's, etc.) used for local call numbers. It also prints summary information for any special Dewey divisions which may be used by your library (such as 'E' for easy, 'F' for fiction, etc.).

For each Dewey decimal division, the report prints the following:

- Number of titles.
- Percentage of the total number of titles.

- Number of volumes (copies of titles).
- Percentage of the total number of volumes.
- Number of volumes circulated this year. (This figure is reset to zero when you use the Reset Circulation feature of the Maintenance menu's Purge menu.)
- Percentage of the year's total circulation.
- Number of volumes circulated since you began using *Surpass/2*. (This figure is never reset to zero.)
- Percentage of the total circulation.

When you select Dewey Division from the Inventory Reports menu, you are asked to get your printer ready by loading it with the proper size paper and setting it to the top of the page. Press any key when you're ready and the report will begin compiling and printing.

The computer will first "compile" the figures to print. The progress of this is shown in a bar graph which appears near the bottom of the screen. The report will begin printing when the compile process is finished.

Press the ESC key if you want to stop printing before the report is finished. You will be asked whether or not you want to continue printing. If you answer "Yes," *Surpass/2* will resume printing. Otherwise, you will be returned to the Inventory Reports menu.

Category Count

The Category Count report prints a summary of each circulation category.

For each circulation category, the report prints the following:

- Number of titles.
- Percentage of the total number of titles.
- Number of volumes (copies of titles).

- Percentage of the total number of volumes.
- Number of volumes circulated this year. (This figure is reset to zero when you use the Reset Circulation feature of the Maintenance menu's Purge menu.)
- Percentage of the year's total circulation.
- Number of volumes circulated since you began using *Surpass/2*. (This figure is never reset to zero.)
- Percentage of the total circulation.

When you select Circulation Category from the Inventory Reports menu, you are asked to get your printer ready by loading it with the proper size paper and setting it to the top of the page. Press any key when you're ready and the report will begin to compiling and print.

The computer will first "compile" the figures to print. The progress of this is shown in a bar graph which appears near the bottom of the screen. The report will begin printing when the compile process is finished.

Press the ESC key if you want to stop printing before the report is finished. You will be asked whether or not you want to continue printing. If you answer "Yes," *Surpass/2* will resume printing. Otherwise, you will be returned to the Inventory Reports menu.

Subject Count

The Subject Count report prints a list of subject headings and the number of times each individual subject heading is used in a MARC record.

This report is most useful when you have added subjected headings manually (as opposed to importing MARC or MicroLIF records) and want to proof your work for misspelled or mis-punctuated subject heading entries. For example, if you entered the subject heading, "Automobiles" in one MARC record and "Automobile" in another, these would be considered by *Surpass/2* to be different subject headings. The Subject Count report will help you locate these types of mistakes.

When you select Subject Count from the Inventory Reports menu, a window appears asking you for a starting and an ending subject heading:

Start with..... Specifies the first subject heading to print.. Leave this field blank if you want to start with the very first subject heading.

For example, if you wanted to start with subjects that begin with "Au," you would type "AU" into this field.

End with Specifies the last subject heading to print.. Leave this field blank if you want to stop with the very last subject heading.

For example, if you wanted to start with subjects that begin with "Au," and end with subjects that begin with "Az," you would type "AU" into the Start With field and "Az" into the End with field.

Leave both the Start With and End With fields blank if you want to print all subject headings.

After you have entered the starting and ending subjects, a question appears at the bottom of the screen to ask you whether you are ready to begin. Answer, "yes" if you are ready to start printing or "no" if you want to enter a different Start With or End With subject heading.

You are then asked to get your printer ready by loading it with the proper size paper and setting it to the top of the page. Press any key when you're ready and the report will begin printing.

Press the ESC key if you want to stop printing before the report is finished. You will be asked whether or not you want to continue printing. If you answer "Yes," *Surpass/2* will resume printing. Otherwise, you will be returned to the Inventory Reports menu.

Lost & Found

The Lost & Found feature of the Inventory menu allows you to maintain a list of inventory items which have been lost and to charge to and collect payments from the patron (if any) who was responsible for the lost item.

When an item is added to the lost items list, its status is changed to "Lost" (from either "Out" or "In"), but it is not deleted from the inventory. If the item is later found, it is removed from the lost items list and its status is changed to "In."

When you select the Lost & Found feature from the Inventory menu, another menu appears with the following features:

Record Lost/Found Items

Allows you to add items to lost items list, charge patrons for lost items, collect payments from patrons and to tell *Surpass/2* that a lost item has been found.

List Lost Items Allows you to print a report of items which have been declared to be lost, the names of the patrons responsible for the loss, the amount charged to the patron and the amount still owed by the patron for the lost item.

Purge Lost Items..... Allows you to permanently remove lost items from inventory.

Record Lost/Found Items

The Record Lost/Found Items feature of the Lost & Found menu allows you to add items to lost items list, charge patrons for lost items, collect payments from patrons and to tell *Surpass/2* that a lost item has been found.

When you select this feature, the Record Lost/Found Items window appears with a list of menu features across the top of the screen.

For Position Only

Lost/Found Items window

Lost/Found Items Window Fields

The following fields appear in the Record Lost/Found Items window:

Barcode The barcode number of the lost item.

Date Lost The date the item was lost.

The Date Lost field is printed on the Lost Items report and is used by the Purge Lost Items feature to permanently remove items which were lost on or before a certain date.

Title The title of the lost item

Patron..... The number and name of the patron to whom the item was loaned (checked out to) when it was lost.

This field appears only on items that were checked out when they were declared to be lost (added to the lost items list).

Charge..... The amount charged to the patron (if any) for the lost item.

When adding an item to the lost list, the charge amount defaults to the price paid for the book (as stored in the inventory item's Price field). You can, of course, override this default charge amount.

This field appears only on items that were checked out when they were lost.

Patron PaidContains the amount paid by the patron for this lost item.

This field appears only on items that were checked out when they were lost.

Balance.....Contains the balance due on lost item.

This field appears only on items that were checked out when they were lost.

Lost/Found Items Menu Functions

When you select the Record/Lost Found Items feature of the Lost & Found menu, the following menu commands are available:

Add.....Allows you to add an item to the lost items list (to tell *Surpass/2* that an item has been lost).

When you select Add, you are asked to enter or scan the barcode number of the item that was lost. If you do not know the barcode number, you can press ENTER and you will be asked to enter the title of the book.

After you select a book by entering its barcode number or title, *Surpass/2* will check to see if the book was checked out to any patron. If it was, the patron's number and name will be displayed.

You will then be asked to enter the date the item was lost and, if the item was checked out to a patron, the amount to charge the patron and the amount the patron has already paid (if any).

After filling in the remaining fields, you will be asked whether you want to add the item to the lost items list. If

you select "yes," the item will be added to the lost items list and its status will be changed to "Lost" in inventory. The patron's ledger will be updated with the charge and the amount paid (if any).

Note: If the item was checked out when it was lost, you will not need to (nor should you) check it in using the Circulation Transactions feature. If you check the item in before adding it to the lost items list, you will not be able to enter a charge for the item when it is added (use the Ledger feature of the Enter/Edit Patrons menu to enter a manual adjustment if you want to charge the patron for the item).

Find Allows you to locate and display an item in the lost items list.

When you select Find, you are asked to enter the barcode number of the lost item. If it is found in the lost items list, its information is displayed in the Record Lost/Found Items window.

Note: You cannot use the Record Lost/Found Items' Find feature to locate books that have not been lost--you can find only those items which have been added to the lost items list.

Found Allows you to tell *Surpass/2* that a previously-lost item has been found.

To tell *Surpass/2* that an item has been found, locate and display the item using the Find feature, then select the Found feature.

A dialog box will appear to ask you whether you want to record this item as found. You may select "yes" or "no."

If you select "yes" to record the item as found and a patron was charged for the item, a dialog box will appear telling you the amount charged and asking you whether you want to credit the patron's account for this amount. Answer "yes" if you want to credit the patron's account ledger or "no" if you want to let the charge stand.

If the patron has made payments on the item, another dialog box will appear telling you the amount collected on the item and asking you whether you have returned this amount to the patron. If you answer "yes," the patron's account will be adjusted to show the amount refunded to the patron. If you answer "no," the patron's account ledger will not be updated and could possibly show a negative balance (indicating that you owe the patron money). One possible reason for not refunding the amount to the patron is if the patron has an outstanding fines balance and you want to apply this amount toward the fines balance.

PaymentAllows you to collect payments on lost items.

This feature should be used to accept and record payments made by patrons for lost items.

To collect a payment for a lost item, use the Find feature to locate the lost item and then select Payment. You will be asked to enter the amount collected.

After entering an amount, the Patron Paid and Balance fields are updated to reflect the payment.

The Payment feature cannot be selected if there is no lost item displayed in the window (use the Find feature to display an item before entering the payment). Payments cannot be collected when the item was not charged to a specific patron (the item was not checked out when it was lost).

Note: While it is possible to collect payments for lost items using the Fines feature of the Circulation Transactions window, it is best to enter these payments here so that the balance on the lost item is correctly updated. If you enter a lost item payment using the Fines feature of the Circulation Transactions window, the patron's overall balance is adjusted properly, but the amount due on this individual lost item will not be correct.

Hint: If you make a mistake when entering a payment, you can make an adjustment by adding another payment with a negative amount.

Next Displays the next record in the lost items list.

Previous..... Displays the previous record in the lost items list.

Exit Returns to the Lost & Found menu.

List Lost Items

The List Lost Items feature of the Lost & Found menu prints a list of items which have been added to the lost items list (using the Record Lost/Found Items feature).

The Lost Items Report lists each items barcode number, call number, title, the date it was lost, the number and name of the patron responsible, the amount charged and the current balance due.

When you select the List Lost Items feature, you will be asked to get your printer ready by loading it with the 8-1/2" paper and setting it to the top of the page. Press any key when you're ready and the report will be printed.

Press the ESC key if you want to stop printing before the report is finished. You will be asked whether or not you want to continue printing. If you answer "Yes," *Surpass/2* will resume printing. Otherwise, you will be returned to the Lost & Found menu.

Purge Lost Items

The Purge Lost Items feature of the Lost & Found menu allows you to permanently remove lost items from both the lost items list and from the main inventory. This should be done only when there is no reasonable hope for the lost items to be found and returned to open inventory.

When you select the Purge Lost Items feature, you will be asked for a date. Only those items which were declared lost on or before the date you enter will be purged. *Surpass/2* uses the date entered in the Record

Lost/Found Items window's Date Lost field to determine whether to purge the item.

After you enter the purge date, a cautionary message will be displayed to confirm that you want to purge all items lost on or before the date you specified. Type YES and press ENTER if you want to continue or anything else to return safely back to the Lost & Found menu.

Physical Inventory

The Physical Inventory feature of the Inventory menu helps you make a physical check of your media center's inventory.

There are three steps to performing a physical inventory:

1. Use the Reset Physical Inventory feature to "clear the slate" of any previous physical inventory.

As items in your collection are counted, *Surpass/2* puts what amounts to a check mark next to each item stored in its files. Resetting effectively erases all these marks so you can start a new count.

2. Use the Inventory Items feature to scan the barcodes of each item in your collection.

This is normally done by loading carts with books bringing the books to the circulation computer (or another one with a barcode wand). If it is not practical to bring the books to the computer, you can use an optional portable barcode wand to take the computer to the books. See your *Surpass/2* dealer for information regarding the portable barcode wand.

3. Use the List Non-Inventoried Items feature to print a list of items which were not counted during the physical inventory.

When you select Physical Inventory from the Inventory menu, a menu appears with the following choices:

Inventory Items..... Allows you to scan or type the barcodes of items to tell the computer that they are in the media center.

List-Non Inventoried Items

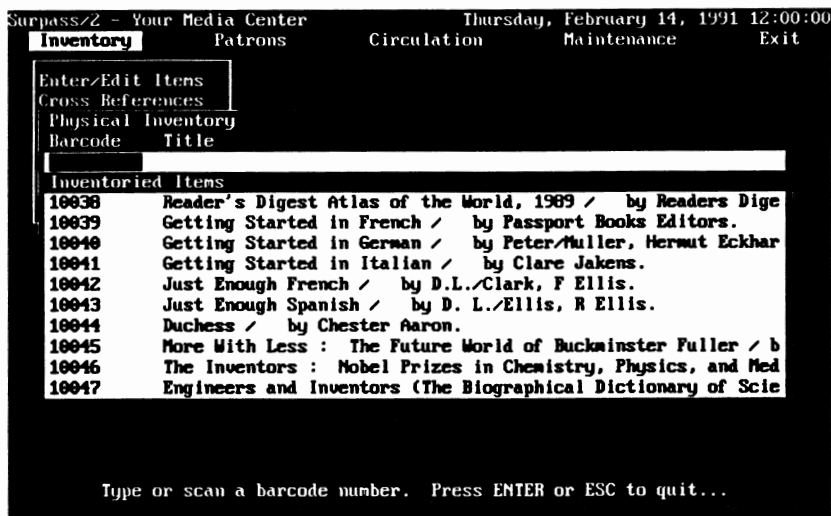
Allows you to print a list of items that were not scanned using the Inventory Items feature (those that are missing).

Reset Physical Inventory

Allows you to end the physical inventory to start a fresh count.

Inventory Items

The Inventory Items feature of the Physical Inventory menu allows you to use the barcode wand or the keyboard to enter barcode numbers of the items that you have found in your media center during a physical inventory check.



Physical Inventory / Inventory Items window

The Physical Inventory screen appears when you select Inventory Items from the Physical Inventory menu. You are immediately asked to start typing or scanning barcode numbers. Use the barcode wand or keyboard to scan the barcodes of items in your inventory.

Each time you scan or enter a barcode number, the item's barcode and title appear in the Inventoried Items section of the window. This section of the window will scroll to show the ten most recently inventoried items.

As you enter or scan barcode numbers, *Surpass/2* makes an internal "mark" on each item's record. This tells it that these items have been counted and are not missing. Those items that have not been inventoried this way will appear on the list of missing items (List Non-Missing Items).

If you enter the barcode number of an item which has already been counted, a dialog box will appear to tell you that you have already inventoried this item.

When you have finished entering barcode numbers, press the ENTER or ESC key to return to the Physical Inventory menu.

Note

You do not have to count all items in one session. You can leave this screen and come back to it as many times as you need to finish your physical inventory count. The work you have done will be retained until you use the Reset Physical Inventory feature to start a new physical inventory count.

List Non-Inventoried Items

The List Non-Inventoried Items feature of the Physical Inventory menu allows you to print a list of items that have not been counted using the Inventory Items feature.

This report should be printed when you have finished counting all items in your collection.

When you select List Non-Inventoried Items from the Physical Inventory menu, you will be asked to load your printer with 8-1/2" paper, align to the top of the page and to press any key when ready. Press ESC to return to the Physical Inventory menu or any other key to begin printing the report.

The missing items report is printed in shelf list order (call number and author order). The report includes the call number, title, barcode number and the current status of the item (missing, checked-out, etc.)

It is quite common to find items on the report that are listed as missing but are indeed in the media center. This usually means that the items were accidentally skipped when they were inventoried. If you locate any such items, you can inventory them using the Inventory Items feature and then print another list of non-inventoried items until you are confident that each and every item has been counted.

Note

Items that appear as "missing" on the list of non-inventoried items are not automatically declared as "lost." Use the Lost & Found feature of the

Inventory menu to tell *Surpass/2* that these items are lost after you are confident that they are indeed lost.

Reset Physical Inventory

Select Reset Physical Inventory from the Physical Inventory menu when you have finished taking a physical inventory count or you are ready to begin a new physical inventory.

The Reset Physical Inventory feature removes the inventory "marks" that were made using the Inventory Items feature. In effect, it tells *Surpass/2* that all items are missing unless you tell it otherwise. If you were to print a list of missing items using List Non-Inventoried Items, all items would be listed as missing.

When you select Reset Physical Inventory, *Surpass/2* displays a cautionary message to ask you to confirm that you are ready to clear the previous inventory. Type YES and press ENTER if you are ready to do this.

If you continue, *Surpass/2* will display an hourglass on the screen as it resets every item in the inventory. This process could take several minutes or several hours depending on the size of your collection and the speed of your computer.

Important

Use Reset Physical Inventory only before you begin taking a new physical inventory count or if you have finished with a previous count and have printed the final list of missing items (List Non-Inventoried Items). If you use this option while you are involved in taking inventory, *Surpass/2* will mark all items as missing and any work you have done with the Inventory Items feature will be lost--you'll have to start over.

Import

Surpass/2's Import features allow you to add new inventory items to your collection without having to manually catalog and add the information to your *Surpass/2* system.

Today, most book vendors offer to send you a disk containing the bibliographic records for the books you purchase from them. The information on these disks is usually obtained from the Library of Congress with other, optional, information added by the vendor.

Book vendors usually provide disks in MicroLIF format, a method for storing MARC records which has become the *de facto* standard for transferring bibliographic information from one computer to another.

When sending your next book purchase order, check the vendor's catalog for information on ordering MicroLIF disks. The vendor will usually need to know the following:

Disk format.....	MicroLIF
Software.....	<i>Surpass/2</i>
Price field	903a
Barcode field	901a
Quantity field (number of copies)..	906a

Additionally, you will want to tell you vendor the type of subject headings you require (Sears or Library of Congress), the barcode numbers to use (you usually assign a range of numbers for the vendor to use for all purchases) and the call number format to use (Library of Congress or Sears). If you are not using Library of Congress call numbers, you will want to tell the vendor how you normally catalog fiction (F, FIC, etc.), bibliographies (B, BIB, etc.), easy books and any other system you might use which is not strictly Dewey.

When you select the Import feature from the Inventory menu, another menu appears with two choices:

MicroLIF Format ... Used by most book vendors.

MARC Format..... Also called USMARC. Used by many retrospective conversion services (including retrospective conversions done by Compel).

MicroLIF Format

When you select the MicroLIF Format feature from the Import menu, *Surpass/2* displays three on-screen forms (windows) you fill out to tell *Surpass/2* how to import the records:

Match Action Tells *Surpass/2* what to do when it "thinks" the record on the MicroLIF disk is the same as one already in your collection.

Acquisition & Barcode Information

Tells *Surpass/2* where certain fields are stored in the MicroLIF record, the vendor code and the source of funds used to purchase the books.

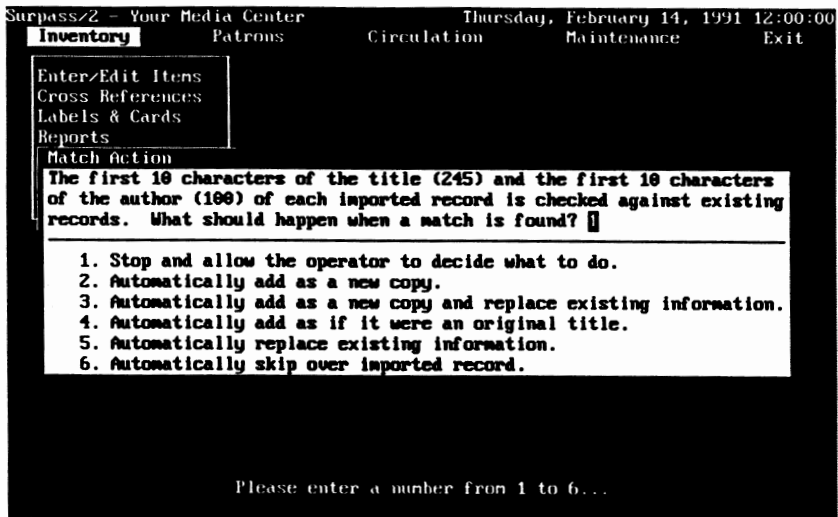
File Name Tells *Surpass/2* the name of the file containing the MicroLIF records.

These windows are displayed in the above order and the questions in them must be answered before *Surpass/2* imports the records from the disk.

Match Action

Surpass/2 compares the first 10 characters of the title and the first 10 characters of the author's name with the MARC records already stored in your computer. If the author and title match an existing record (or if the barcode number of the record on the disk matches one in the computer), *Surpass/2* considers the two records to be matches.

The Match Action window allows you to tell *Surpass/2* what to do when it encounters what it thinks is a match.



Import Match Action window

There are six different ways for *Surpass/2* to handle matches. Enter the number of your choice in the field in the Match Action window:

1. Stop and allow the operator to decide what to do.

This option causes *Surpass/2* to stop and display a message when it thinks it has found a match and to give you a list of options on what to do with the imported record.

To help you decide whether or not these are indeed the same title, the program displays the title, author and call number of the record read from the disk and of the record stored in your computer.

This is the safest option and should be used when you are not sure whether or not the records on the disk will match any already in your computer.

2. Automatically add as a new copy.

This option tells *Surpass/2* to automatically assume that any matches found are indeed the same title and that the existing record should just have one or more copies added to it. The bibliographic information of the record on the disk will be discarded, but the number of copies of the existing record will be increased.

This option should be used when you know that many of the records on the disk are additional copies of books you already have.

Note: Remember that *Surpass/2* compares only the first 10 characters of the title and author and could, therefore, "match" two books that aren't really matches. So, use this option with caution.

3. Automatically add as a new copy and replace existing information.

This option is the same as Option 2 except it replaces the MARC record in your computer with the bibliographic information for the matching record on the disk.

This option should be used when you know that many of the records on the disk are additional copies of books you already have and when you believe the information on the disk is more recent or more fully cataloged than the information in your computer.

4. Automatically add as if it were an original title.

This option causes the program to ignore any matches and consider each record read from the disk to be a new title (one that is not already in the computer).

This option should be used only when you are certain that none of the books on the disk are copies of books already stored in your computer.

5. Automatically replace existing information.

This option will replace the information in your computer with the bibliographic information read from the disk when *Surpass/2* thinks the two records match. When a match is found, the information on the disk replaces that stored in your computer without adding a new title or an additional copy.

This option is most useful when you have only minimal cataloging information in your computer and the cataloging information on the disk is complete or more so than that in your computer. It should be used only when you are certain that any matches the computer might find will, in fact, be copies of the same title.

Some book vendors, such as Bound to Stay Bound, provide cataloging information on two disks. One contains the information from the vendor (with minimal cataloging) and the other contains the full Library of Congress MARC records. You would first import the records from the vendor's disk and then use Option 5 to read the records from the full MARC disk to update your records with the full MARC cataloging records.

6. Automatically skip over imported record.

This option causes *Surpass/2* to skip over any records it considers to be matches. If it finds a record on the disk that matches one already in the computer, it simply ignores the record on the disk.

Option 6 is useful only in the following circumstance: You started reading a disk and you experienced a technical problem after it imported one or more records. After correcting the technical problem, you can use Option 6 to read the disk again and have *Surpass/2* ignore the records previously read.

Acquisition & Barcode Information

The Acquisition & Barcode Information window allows you to tell *Surpass/2* how certain fields are stored on the disk, the vendor's code and the funds used to purchase the books.

```
Surpass/2 - Your Media Center          Thursday, February 14, 1991 12:00:00
Inventory      Patrons      Circulation      Maintenance      Exit
Enter/Edit Items
Cross References
Labels & Cards
Reports
Lost & Found
Physical Inventor Acquisition & Barcode Information
Import      Vendor code:      BTSB
MicroLIF      Acquisition date:      02/14/1991
MARC Form      Acquisition cost in Field: 903A
      Acquisition fund:      CHAPT 11
      Location:      0215
      Barcode number in Field: 901A
      Number of copies in Field: 906A

Please enter acquisition and barcode information...
```

Import Acquisition & Barcode Information window

With the exception of the vendor code and the acquisition fund, each field in this window has a default value that should be used. There are only rare exceptions to this about which your vendor can tell you.

The fields in the Acquisitions & Barcode Information window are:

Vendor Code The code you use in your system to designate this vendor (such as "B&T" or "BTSB").

You may use any system you choose to assign codes to vendors, but you should make sure you always use the same code for the same vendor.

Acquisition Date The date the items on the disk were purchased.

This date will appear on the Inventory menu's Enter/Edit Items window and is used when printing lists of items purchased during a certain range of dates.

Acquisition cost in Field

The MARC field on the disk that contains the price you paid for the item.

The price is normally stored in Field 903a (the default). Your vendor can tell you if it's stored in a different field.

Acquisition fund..... The code of the source of funding used to purchase these books (such as "CHAP II" or "PTA").

You may use any system you choose to assign codes to funds, but you should make sure you always use the same code for the same fund.

Location The location code of your media center or school.

This field can almost always be left as the default value. The only time it should be changed is when one *Surpass/2* system is used by more than one library.

Barcode number in Field

The MARC field on the disk that contains the barcode number of the item.

The barcode number is normally stored in Field 901a (the default). Your vendor can tell you if it's stored in a different field.

If the disk does not contain barcode numbers or if the barcode number cannot be located in the field you specify, *Surpass/2* will automatically assign each item a new barcode number.

Number of copies in Field

The MARC field on the disk that contains the number of copies purchased (the quantity).

The number of copies (quantity) is normally stored in Field 906a (the default). Your vendor can tell you if it's stored in a different field.

If the disk does not contain a field for quantity or if the quantity cannot be located in the field you specify, *Surpass/2* will automatically assume that the quantity purchased is one.

File Name

The File Name window asks for the name of the disk file containing the MicroLIF records.

With few exceptions, MicroLIF files are named "IBM.FIL". If the disk is in your computer's Drive A, you would enter "A:\IBM.FIL" for the file name (this is the default). If the disk is in Drive B, you would enter "B:\IBM.FIL" for the file name.

After you enter the file name, *Surpass/2* will ask you to insert the MicroLIF disk in the proper disk drive and to press any key. When you press a key, it will immediately begin importing records from the disk.

As it is importing records, *Surpass/2* displays a message at the bottom of the screen telling you what it's doing (i.e. Reading Record 10, Writing Record 10). When it is finished, it will return to the Import menu.

If *Surpass/2* encounters any "matches" and you have chosen Option 1 (Stop and allow the operator to decide what to do) from the Match Action window, the program will stop and display the author, title and call number of the record on the MicroLIF disk and of the title in your computer that it thinks is a match.

You then tell *Surpass/2* what to do with the record by selecting one of five options. The options presented are the same as options 2 through 6 of the Match Action screen except they are numbered differently and affect only the record displayed on the screen.

MARC Format

When you select the MARC Format feature from the Import menu, *Surpass/2* displays four on-screen forms (windows) you fill out to tell *Surpass/2* how to import the records:

MARC Format Information

Tells *Surpass/2* how the MARC records are stored.

Match Action

Tells *Surpass/2* what to do when it "thinks" the record on the MARC disk is the same as one already in your collection.

Acquisition & Barcode Information

Tells *Surpass/2* where certain fields are stored in the MARC record, the vendor code and the source of funds used to purchase the books.

File Name Tells *Surpass/2* the name of the file containing the MARC records.

These windows are displayed in the above order and the questions in them must be answered before *Surpass/2* imports the records from the disk.

MARC Format Information

The MARC Format Information window allows you to tell *Surpass/2* about any special technical characteristics of the MARC file.

For Position Only

Import MARC Format Information window

The MARC Format Information window contains five fields. Each of these fields has a default value which is standard for most MARC (or USMARC) files and should be changed only when your MARC record vendor tells you otherwise. The information here is rather technical, but your vendor will be able to tell you if it's records are different from the defaults:

Record code..... The ASCII value of the character that is at the end of each bibliographic record . The default is 29.

Field code The ASCII value of the character that is at the end of each field in a MARC record. The default is 30.

Subfield code The ASCII value of the character the precedes each subfield in a MARC field. The default is 31.

Record header length

The number of characters at the beginning of each record which are not a part of the MARC record and should be discarded. The default is 0.

File header length ... The number of characters at the beginning of the file which is not a part of a MARC record and should be discarded. The default is 0.

Match Action

The MARC Format's Match Action window is the same as the MicroLIF Format's Match Action window. See the previous section, MicroLIF Format, for detailed instructions on how to use this window.

Acquisition & Barcode Information

The MARC Format's Acquisition & Barcode Information window is the same as the MicroLIF Format's Acquisition & Barcode Information window. See the previous section, MicroLIF Format, for detailed instructions on how to use this window.

File Name

The File Name window asks for the name of the disk file containing the MARC records.

With few exceptions, MARC files are named either "MARC" or "USMARC". For example, if the disk is in your computer's Drive A, you would enter "A:\MARC." for the file name (this is the default). If the disk is in Drive B, you would enter "B:\MARC" for the file name.

From this point on, the procedure is the same as for importing MicroLIF records. See the previous section, MicroLIF Format, for detailed information.



Patrons

The Patrons function of the Main menu contains features pertaining to patron information.

When you select Patrons from the Main menu, a menu appears allowing you to select from the following functions:

Enter/Edit Patrons.. Allows you to display patron records, add new patrons and make changes to existing patron records.

Reports..... Allows you to print different types of patron-related reports.

Print Patron Cards. Allows you to print barcoded cards or labels for your patrons.

Enter/Edit Patrons

The Enter/Edit Patrons function of the Patrons menu allows you to find and display patron records, add new patrons or make changes to existing patron records.

When you select Enter/Edit Patrons, a blank patron record window and the Enter/Edit Patrons menu will appear.

```
Surpass/2 - Your Media Center          Thursday, February 14, 1991 12:00:00
Add Find Edit Delete List Status Ledger Next Previous Exit

Patron Information
Patron Number: 1753368 | Expiration: / /
Name (Last/First): Anderson, Henry
Street: 109 W. 29th Street
City, State, ZIP: Orlando, FL 32405
Telephone: (407)555-2931
Patron Type or Grade: Grade 5
Location: 0215 | Address at Location: 301
Parent Name: Julia Anderson
Emergency Phone: 555-7770
:
```

Enter/Edit Patrons window

Patron Fields

Patron information is displayed in the Patron Information window using the following fields:

Number The patron number is unique to each patron and is assigned either by *Surpass/2* or by the person who adds patrons records.

Patron numbers can range from 1 to 9,999,999,999.

NameTwo fields are used for patron names. The first stores the patron's last name and the second stores the patron's given name (first and middle names).

Street.....This is an optional field for the patron's street address.

City, St., ZIPThese three optional fields contain the patron's city, state and ZIP code. The standard two-letter state abbreviation should be entered in the State field. The ZIP field may contain either five- or nine-digit ("ZIP+4") ZIP codes.

Patron TypeThis field contains either the patron's school grade year (1-12 or 0 for kindergarten) or the patron's type. The information entered in this field is used for sorting reports and, most importantly, for determining how long each patron may keep checked-out items.

A patron one-letter patron type code may be entered instead of a grade year. These types are `N' for "Normal," `S' for "Staff," `I' for "Inactive" and `O' for "Other." The definition of what these types mean is up to you and is used for sorting reports and determining loan periods.

LocationThe home school or library branch of the patron. When adding new patrons, this will default to your school or branch.

The codes used for different locations or branches is up to you but you should be consistent.

Local Address ...The homeroom or area of the patron's home school where the patron should receive overdue and reservation notices. This field can also be used when sorting patron reports and certain circulation reports.

The codes used for different local addresses is up to you.

User-DefinedThe last three fields on the Patron Information window are used for entering notes or any other kind of information pertaining to your library.

The names and types of information stored in these fields are defined using the Define Patron Fields feature of the Maintenance / System Setup menu. (Refer to Page 207 for more information on this subject.)

Enter/Edit Patron Menu Functions

The following functions are available in the Enter/Edit Patrons screen:

Add Clears the Patron Information window and allows you to enter information for a new patron.

The fields where you may type are displayed as violet boxes (underlines on monochrome monitors). You may use any of the editing keys explained in the Using the Keyboard section of this manual to move from one field to another and to correct typing mistakes.

When adding a new patron, you may assign a patron number by entering on in the Patron Number field. If you leave this field blank (0), *Surpass/2* will assign a number for you.

If the patron number you entered is already assigned to another patron, *Surpass/2* will display a dialog box telling you that it has given the patron a different number from the one you entered.

Find Clears the Patron Information window and allows you to find a patron based on the patron's number or name.

You are first asked to enter a patron number. If you want to search by number, type the number and press ENTER.

If you want to search by name, leave the Patron Number field empty (0) and press the ENTER key. You will then be asked to enter a patron name. Type the patron's last name in the first field and press ENTER, then type the given (first and middle) name in the second field and press ENTER.

It is not necessary to type the complete name. However, the last name must be complete if any part of the first name is to be entered.

If the patron record is found, his or her record will be displayed in the Patron Information window. Otherwise, a dialog box will appear telling you that the patron could not be located. Press any key to make the dialog box disappear.

If you cannot find a record and are sure you did not make a typing mistake, try searching using fewer letters of the patron's last name (perhaps the name was entered incorrectly). Or, use the List function to display a list of all patrons on the screen.

Edit.....Allows you to make changes to the currently displayed patron record.

The Edit function is available only when a patron record is displayed in the Patron Information window. To edit a patron record not currently displayed on the screen, use the Find, List, Next or Previous functions to locate and display the record.

The fields where you may type are displayed as violet boxes (underlines on monochrome monitors). You may use any of the editing keys explained in the Using the Keyboard section of this manual to move from one field to another and to correct typing mistakes.

The Patron Number field cannot be edited. If you want to assign a new number to the patron, you must first delete the patron's old record (see Delete) and add a new one with the new number.

DeleteAllows you to permanently remove the currently displayed patron record.

Before the record is removed, you are asked whether you want to delete the current record. If you answer "no," the record will not be removed.

The Delete function is available only when a patron record is displayed in the Patron Information window. To delete a patron record not currently displayed on the screen, use the Find, List, Next or Previous functions to locate and display the record.

You cannot delete patrons who have items checked out to them. If you attempt to do so, a dialog box will appear explaining that the patron cannot be deleted. If you wish to delete these patrons, you must use the Circulation Transactions screen to check in the items or the Lost & Found feature of the Inventory menu to declare the items lost.

List Displays a window listing all the patrons in the system.

You may select a record to display by using the arrow keys and the PGUP and PGDN keys to scroll through the list and position the highlight (underline on monochrome monitors) on the patron record. When the highlight is on the record, press the ENTER key to display that patron's information on the screen.

Press the ESC key if you do not want to select a patron from the list.

Status This feature allows you to display a list of the items currently checked out to this patron or a history all items checked out to this patron since the last transaction purge (See "Purge Files" starting on Page 229.)

When you select the Status function, a menu appears allowing you to select Checked Out or History. If you select Checked Out, only those items which are currently checked out to the patron will be displayed. If you select History, a list of all circulation transactions for this patron is displayed (those that were done since the last transaction purge).

The transaction list is displayed in check-out-date order and includes each item's barcode number, title, date checked out, date due and date checked in. If there are more transactions than will fit in the window, you may

use the PGDN and PGUP keys to display different "pages" of the list. Press the ESC key to remove the list and return to the Enter/Edit Patrons menu.

If there are no transactions to display for the patron, a dialog box will appear telling you so.

The Status function is available only when a patron record is displayed in the Patron Information window. To display the status for a patron record not currently displayed on the screen, use the Find, List, Next or Previous functions to locate and display the record.

Ledger This function allows you display a ledger of the patron's fines, charges and payments and to make adjustments to the patron's balance.

When you select Ledger, a menu appears allowing you to select Ledger or Adjustment. Select Ledger to display the patron's ledger or Adjustment to enter an adjustment to the patron's balance.

If you select Ledger, the patron's fines, charges and payments ledger is displayed in date order. The ledger includes the transaction date, the description, the type (fine, payment, charge, etc.), the amount (payments are shown as negative amounts) and the running balance. If there are more transactions than will fit in the window, you may use the PGDN and PGUP keys to display different "pages" of the ledger. Press the ESC key to remove the ledger and return to the Enter/Edit Patrons menu.

If you select Adjustment, a window will appear asking you to enter the date, description and amount of the adjustment. Amounts that decrease the patron's balance (payments) are entered as negative values.

When you have finished entering the date, description and amount, a message will appear asking you if the information entered is correct. If you answer "no," you will be allowed to make changes. If you answer "yes," a new transaction will be added to the patron's ledger with

the information you entered. Press ESC if you do not want to enter any ledger adjustment.

The Ledger function is available only when a patron record is displayed in the Patron Information window. To display or make adjustments to the ledger of a patron record not currently displayed on the screen, use the Find, List, Next or Previous functions to locate and display the record.

Next Displays the next patron record or the first record if no record is currently displayed.

Previous..... Displays the previous patron record or the last record if no record is currently displayed.

Exit Returns to the Patrons menu.

Reports

The Reports function of the Patrons menu allows you to print reports that have to do with patron records.

When you select Reports from the Patrons menu, a menu of three reports appear:

Patron ListAllows you to print a list of any or all patrons.

Fines List.....Allows you to print a list of patrons who have outstanding fines and charges balances.

Status Reports

Allows you to print individual reports for patrons showing the patron's current balance and a list of items which are currently checked out.

Patron List

Select Patron List from the Patron Reports menu to print a list of any or all patrons.

Surpass/2 - Your Media Center Thursday, February 14, 1991 12:00:00
 Inventory **Patrons** Circulation Maintenance Exit

Patron List

Sort field: 3 Name

Range field: 11 Local address
 Start with: SANDERS
 End with: SANDERS

Range field: 0
 Start with:
 End with:

Paper width: Narrow Narrow (8") / Wide (13")
 Type size: Pica Pica (10cpi) / Elite (12cpi) / Compressed (17cpi)

#	Field	Width	#	Field	Width	#	Field	Width
√	1.Number	11	6.State	3	√	11.Local address	11	
	2.Expiration date	11	7.ZIP Code	11		12.Fines balance	8	
√	3.Name	38	8.Phone number	20	√	13.Parent Name	16	
	4.Street address	36	√	9.Grade/type	3		14.Emergency Phone	16
	5.City	21		10.Location	11		15.	16

Paper width: 80 Used: 79 Remaining: 1

Are you ready to begin? YES NO

Patron List window

When you select Patron List, a window will appear asking you for the following information:

Sort field..... This is where you tell *Surpass/2* how you want your report to be sorted. There are 15 numbered fields listed in the bottom section of the window. You can sort on *any* of these fields. Just enter the number that corresponds to the way you want your report sorted. For example, enter the number, 1, if you want to sort by patron number.

If you select a field other than 1. Number or 3. Name (those that are normally indexed), *Surpass/2* will index the file before printing. This could take some time depending on the number of patrons you have.

If you sort your report on Field 11 (local address), each local address (usually homeroom) will begin on a new page. This makes it easy to distribute location-sorted patron reports.

Range field Enter a field number here to tell *Surpass/2* on which field you would like to select records to be printed or enter a zero if you want to print all records. For example, to print only patrons who are within a certain range of local addresses (homerooms), enter the number, 11, here (the field number for location).

Start with..... Enter the patron number, name, local address, etc. for the start of the range. This is based on the field number you entered in the Range Field. For example, if you want to print only those patrons in the "SMITH301" homeroom, enter 11 (local address) in the Range Field and "SMITH301" in the Start With field.

End with Enter the patron number, name, local address, etc. for the end of the range. This is based on the field number you entered in the Range Field. Leave this field blank if you want the end of the range to be the same as the start. For example, to print only those patrons in the "SANDERS418" through "SMITH301" homerooms, enter 11 (local address) in the Range Field,

"SANDERS418" in the Start With field and "SMITH301" in the End With field.

There are two sets of Range, Start With and End With fields. The second set allows you to further narrow the range of patrons to be printed. As an example, you might use this feature to print a list of 12th grade patrons who owe fines. To do this, you would do the following:

Use the first range for grade/type range (enter 9 in the Range Field and 12 in the Start With and End With fields). Use the second range for fines (enter 12 in the Range field, 0.01 in the Start With field and 9999.99 in the End With field).

Paper width.....This field tells *Surpass/2* the size of the printer paper you'll be using. You can select `N' for narrow or `W' for wide paper. If you have a laser printer and have a legal-size paper cartridge, you can also select `L' for "Legal+Wide" paper (the text will be rotated so that it prints lengthwise).

Type sizeThis field tells *Surpass/2* the size of the print to use for the report. You can select `P' for pica (10 characters-per-inch), `E' for elite (12 characters-per-inch), or `C' for compressed (about 17 characters-per-inch). If you are using a laser printer and do not have a font cartridge that supports elite type, the "Elite" selection will not be available. Also, if you have a laser printer, compressed print prints as 16.66 characters-per-inch.

Fields.....Place an `X' to the left of each field that you want to appear on the report. Put a space next to (or leave blank) fields that you do not want to appear on the report.

The three user-defined fields (13-15) allow you to specify the width (number of spaces) to be used for each field user-defined field to appear on the report. You may enter a number from 5 to 16 in these fields.

As you are selecting fields, watch the "Paper width," "Used" and "Remaining" values at the bottom of the window. "Paper width" tells you the width of the report

in spaces based on the paper size and the size of the type. "Used" tells you how many spaces you've used so far. "Remaining" tells you how many spaces you have left. If you find that you have exceeded the available space, remove some fields from your report and/or reduce the width of one or more fields.

If you are satisfied with the format of the patron report as it is or you are finished making changes, press the PGDN key.

After you have entered or changed information in the Patron Report window, you will be asked whether you are ready to continue. If you answer "no," you will be allowed to go back and make further changes to the design of the patron report.

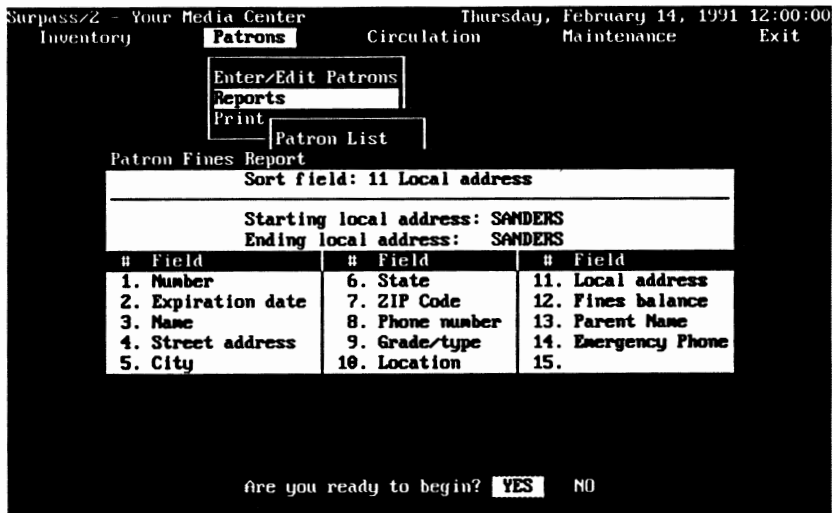
If you made any changes on the Patron List screen, you will be asked whether you want to save the changes as the "default" Patron List. If you answer "yes" to this question, the report you just designed will automatically appear each time you print an Patron List.. The next time you print the report, you can just skip through the Patron Report window by pressing the PGDN key.

You will then be asked to load the proper type of paper in your printer and to put your printer on-line. Press any key to begin printing the report.

If you press ESC before the report begins printing, you will be returned to the Patron Reports menu. If you press ESC while the report is being printed, a dialog box will appear asking you if you want to stop printing. If you answer "yes," you will be returned to the Patron Reports menu. Otherwise, the report will continue printing from where it was stopped.

Fines List

Select Fines List from the Patrons Reports menu to print a list of patrons who have outstanding fines and charges balances.



Patron Fines List window

Like the Patron List, the Fines List allows you to sort on any of the 15 patron fields. There are three pieces of information you supply to print a Fines List:

Sort field A number between 1 and 15 to tell *Surpass/2* how you want to sort the Fines List.

If you select a field other than 1. Number or 3. Name (those that are normally indexed), *Surpass/2* will index the file before printing. This could take some time depending on the number of patrons you have.

If you sort your report on Field 11 (local address), each local address (usually homeroom) will begin on a new page. This makes it easy to distribute location-sorted patron reports.

Starting Address The first local address (homeroom) to include on the report. Leave this field blank if you want to start with the first homeroom (in alphabetical order).

Ending Address The last local address (homeroom) to include on the report. Leave this field blank if you want to print through the last homeroom (in alphabetical order).

Use the arrow and editing keys to make changes in this window. When you are finished, or if you don't want to change the default values, press the PGDN key.

You will be asked if you are ready to begin. If you answer "no," you will be allowed to change the way the report is sorted and/or the range of local addresses to be printed.

Surpass/2 is now ready to print the fines list. When asked, load your printer with the proper size paper and press any key. If you do not want to print the report, press the ESC key to return to the Patron Reports menu.

The Fines List will print in the order you selected. It lists each patron's number, name, grade/type, location, local address (homeroom) and current fines and charges balance. Only those patrons who have a positive balance are printed.

Status Reports

Select Status Reports from the Patron Reports menu when you want to print a report for one or more patrons showing each patrons fines and charges balance, a list of the items currently checked out to each patron and a list of items currently reserved for each patron.

```

Surpass/2 - Your Media Center          Thursday, February 14, 1991 12:00:00
Inventory      Patrons      Circulation      Maintenance      Exit
                Enter/Edit Patrons
Patron Status Report
Sort field: 3 Name
-----
Range field: 10 Location
Start with: SANDERS
End with: SANDERS
-----
Range field: 0
Start with:
End with:
-----
# Field      # Field      # Field
1. Number    6. State     11. Local address
2. Expiration date  7. ZIP Code  12. Fines balance
3. Name      8. Phone number  13. Parent Name
4. Street address  9. Grade/type  14. Emergency Phone
5. City      10. Location  15.
-----
Are you ready to begin? YES  NU
  
```

Patron Status Report window

When you select Status Reports, a window appears asking you for the sort field and two range fields. This is very similar to the window that appears when you print a Patron List and contains the following fields:

Sort fieldThe number of the field on which you want to sort the report. For example, enter the number, 1, if you want to sort by patron number.

If you select a field other than 1. Number or 3. Name (those that are normally indexed), *Surpass/2* will index the file before printing. This could take some time depending on the number of patrons you have.

Range fieldThe number of the field by which you want to select a range or zero if you want to print all records. For example, to print reports only for patrons who are within a certain range of local addresses (homerooms), enter the number, 11, here (the field number for location).

Start withEnter the patron number, name, local address, etc. for the start of the range. This is based on the field number you entered in the Range Field. For example, if you want to print only those patrons in the "SMITH301" homeroom, enter 11 (local address) in the Range Field and "SMITH301" in the Start With field.

End withEnter the patron number, name, local address, etc. for the end of the range. This is based on the field number you entered in the Range Field. Leave this field blank if you want to the end of the range to be the same as the start. For example, to print reports only for those patrons in the "SANDERS418" through "SMITH301" homerooms, enter 11 (local address) in the Range Field, "SANDERS418" in the Start With field and "SMITH301" in the End With field.

There are two sets of Range, Start With and End With fields. The second set allows you to further narrow the range of patrons for which reports will be printed.

Use the arrow and editing keys to make changes in this window. When you are finished, or if you don't want to change the default values, press the PGDN key.

You will be asked if you are ready to begin. If you answer "no," you will be allowed to change the way the reports are sorted and/or the range of patrons for which to print status reports.

Surpass/2 is now ready to print the fines list. When asked, load your printer with the proper size paper and press any key. If you do not want to print the status reports, press the ESC key to return to the Patron Reports menu.

A report will be printed for each patron within the specified range. The report has three sections:

- 1 The first section that includes the patron's number, name, location (school), local address (homeroom), type or grade and current fines and charges balance.
2. The second section is a list of the titles and due dates of items which are currently checked out to the patron.
3. The third section is a list of the titles and dates of all pending reservations for this patron. Only current, pending reservations are printed; reservations for items that have already been checked out to the patron or have been dropped are not included.

Print Patron Cards

The Print Patron Cards function of the Patron menu allows you to print barcoded cards and/or labels for patrons. These cards may be put in a Rolodex file or distributed to patrons. When a patron wishes to check out a book or other item, the barcode on the card can be used to expedite the process.

```
Surpass/2 - Your Media Center          Thursday, February 14, 1991 12:00:00
Inventory      Patrons                Circulation      Maintenance      Exit
                Enter/Edit Patrons
                Reports
Patron Cards
Sort field: 3 Name
-----
Range field: 11 Local address
Start with: SANDERS
End with: SANDERS
-----
Card or label length in lines (6 lines-per-inch): 6
# Field      # Field      # Field
1.Number      6.State      11.Local address
2.Expiration date  7.ZIP Code   12.Fines balance
3.Name        8.Phone number 13.Parent Name
4.Street address  9.Grade/type  14.Emergency Phone
5.City        10.Location   15.
```

Are you ready to begin? YES NO

Print Patron Cards window

When you Select Patron Cards, a window appears asking you for the following information:

Sort FieldThe number of the field on which you want the cards or labels to be sorted. The fields and their numbers are displayed at the bottom of the screen. For example, to sort by the Patron Number field, enter the number 1 in this field.

Range FieldThe number of the field with which you want to select patron records. For example, if you want to print cards for only a given homeroom (local address), enter 11 in this field. Leave this field blank if you want to print cards or labels for all patrons.

Start With The starting number, word, name, location, etc. of the first card you want to print. This is based on the number you entered in the Range Field. For example, if you entered 11 in the Range Field (local address), you would enter the name of the first local address you want to print. Leave this field blank if you want to start with the very first local address.

End With The ending number, word, name, location, etc. of the last card you want to print. Again, this is based on the field you specified in the Range Field. Leave this field blank if you want to print cards only for the value, name, location, etc. you entered in the Start With field. For example, to print cards for only one local address, enter the name of the location in the Start With field and leave the End With field blank.

Length The length of the card in lines. There are six lines per inch. For example, to print on a card that is two inches long, you would enter 12 in this field ($2 \times 6 = 12$). You cannot adjust the value of this field if you are using a laser printer.

If you have a laser printer, patron barcodes are printed on labels just like inventory item barcode labels. These labels may later be affixed to any type of card stock.

Use the arrow and editing keys to make changes in this window. When you are finished, or if you don't want to change the default values, press the PGDN key.

You will be asked if you are ready to begin. If you answer "no," you will be allowed to change the way the cards are sorted and the range of patrons for which to print cards.

After you have finished making any changes to the Patron Cards window, a dialog box will appear asking if you want to print a sample for alignment. If you answer "yes," a sample card or label will be printed and you will be given the opportunity to print another sample.

It is a good idea to print one or two sample cards to make sure the printed text and barcodes are properly centered on the card or label and that the spacing between cards is correct. If the alignment is not correct, you can

adjust the paper or card stock in your printer and continue to print samples until everything is in alignment. If the spacing between cards is not correct, make sure the number you entered in the Length field is correct for the size card or label you are using.

The patron cards will begin printing when you answer no to the "Do you want to print a sample for alignment?" question.



Circulation

The Circulation function of the Main menu allows you to access the Circulation Transactions screen and to print circulation reports.

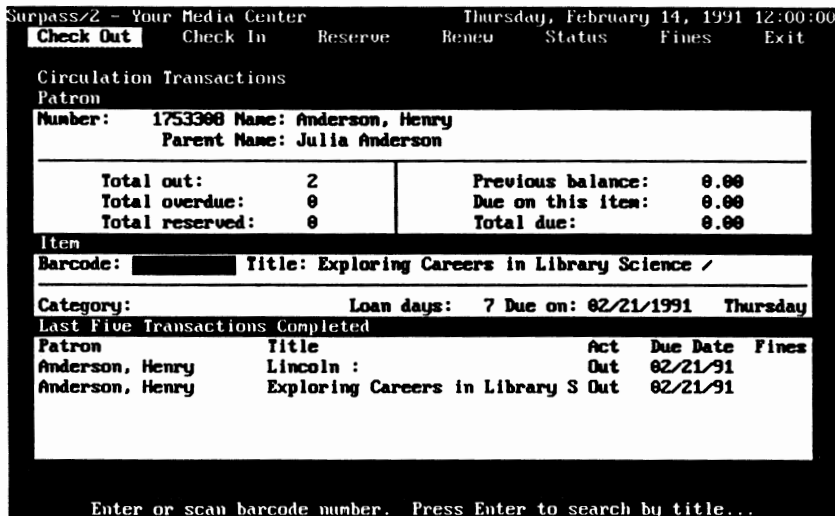
When you select Circulation from the Main menu, a menu appears with two functions:

Transactions..... Takes you to the Circulation Transactions screen where you may check items in or out, renew items, collect fines and perform most of the functions normally done at your circulation desk.

Reports..... Displays a menu of circulation reports.

Transactions

Think of the Circulation Transactions screen as your "circulation desk." It is where you check items in or out, renew items, make reservations, collect fines, etc.



Circulation Transactions window

When you select Transactions from the Circulation menu, a blank Circulation Transactions window appears and a menu appears across the top of the screen.

The Transactions window is divided into three main sections: Patron, Item and Last Five Transactions Completed. The Patron section shows information about the patron with which you are working. The Item section shows information about the item you are checking out, checking in, renewing or for which you are checking the status. The Last Five Transactions section shows a list of the five most recent transactions completed (check in, check out, renew, charge fine and collect fine) since you entered the Circulation Transactions screen.

Circulation Transactions Fields

Number The patron's number.

- Name** The patron's name.
- Notes**..... The contents of your first user-defined patron field. The name and contents of this field will vary depending on how you defined the field. (See the "Define Patron Fields" starting on Page 207.)
- Total Out**..... The number of items which are currently checked out to the patron.
- Total Overdue**..... The number of items which are currently checked out to the patron and are overdue.
- Total Reserved**..... The number of items which are currently reserved for this patron.
- Previous Balance** The patron's fines balance not including fines charged on any currently overdue items (including the one being checked in, if any).
- Due on This Item** The fine to be charged this patron for the item displayed on the screen (if any).
- Total Due** The total of the Previous Balance and the amount due on the currently displayed item (if any).
- Barcode** The barcode number of the item.
- Title** The title of the book (or other inventory item).
- Category**..... The circulation category code of the item.
- Loan Days** The number of days this item may be checked out to the currently displayed patron.
- Due On** The date the currently displayed item will be due when it is checked out to the current patron.

Circulation Transactions Menu Functions

The features of the Circulation Transactions screen are very easy to use and you can probably understand their function by just reading the screen. But, we'll take a closer look anyway:

Check Out You guessed it! This feature allows you to check out a book.

Select Automatic or Manual Due Date

When you select Check Out, a menu will appear asking whether you want to use an Automatic Due Date or a Manual Due Date. Select Automatic if you want the computer to calculate the due date for you or Manual if you want to enter it yourself.

Select a Patron

Next, you'll be asked to enter or scan a patron number. You can use the keyboard or your barcode wand to enter the patron number. If you don't know the patron's number, enter a `0' in this field and you will be allowed to enter the patron's name.

The patron's name is entered last name first. You do not have to enter the entire name; just the first few letters of the last name will usually find the patron for you. If there is more than one patron matching what you entered, a list of matching patron names will appear. Use the up and down arrow keys to select a patron and press ENTER.

Select an Item

Next, you'll be asked to type or scan a barcode number. If you don't know the barcode number, press ENTER and you will be allowed to enter a title. You do not need to enter the entire title; just the first few letters will usually find it for you. If there is more than one title matching what you entered, a list of matching titles will appear. Use the up and down arrow keys to select a title and press ENTER. If there is more than one copy of the title, a list of the

barcode numbers of each copy will appear. Use the up and down arrow keys to select the proper copy and press ENTER.

If you selected Automatic Due Date, the transaction will be complete at this point and a summary of the transaction will appear in the Last Five Transactions Completed list.

Enter a Manual Due Date

If you selected Manual Due Date, the you will be asked to enter the number of days the patron may keep the item. If you press ENTER without changing the default loan days, you will be allowed to enter the due date directly.

After a Check Out transaction is complete, you are immediately taken back to the point where you can enter or scan another barcode number. You can continue checking items out to this patron. When you are finished checking out to this patron, press ESC when asked for the barcode number and you'll be taken back to the point where you can specify a new patron. If you are finished checking out and want to select another feature, press ESC when you are asked to enter or scan a patron number and you'll be taken back to the menu.

Check In..... This feature allows you to check in items.

Select an Item

You will be asked to enter or scan the barcode number of the item being checked in. As with checking out, you can press ENTER to skip over the barcode and enter a title instead.

The information for the item and the patron holding it will appear on the screen. If there are fines due on the item, you will be shown the amount and asked to enter the amount collected.

At this point, the Check In transaction is complete and a summary of the transaction will appear in the

Last Five Transactions list. You are then taken back to the point where you can check in another item. If you are finished checking in and want to select another feature, press ESC when asked for a barcode number and you'll be returned to the menu.

Reserve This feature allows you to enter a reservation for an item which is not currently available in the library.

The procedure is exactly the same as the Check Out feature (you select a patron and an inventory item).

Next, you'll see a window showing the number of copies available (those owned by the library), the number of patrons already waiting for this item and the date when the next copy is due back in the library. A message at the bottom of the screen asks whether you want to reserve the item for this patron. If you answer "yes," the reservation will be recorded and a summary of the transaction will appear in the Last Five Transactions list.

Renew This feature allows you to renew an item that is currently checked out.

As with Check Out, you are asked whether you want the due date to be calculated automatically or whether you want to enter a date manually. From this point, procedure is exactly the same as the Check In feature (you select an inventory item).

The transaction is complete immediately after you select an item and a summary of the transaction is shown in the Last Five Transactions list.

Status The Status feature allows you to check the status of an inventory item or of a patron.

When you select Status, a menu will appear asking whether you want to see the status of a patron or of an inventory item. If you select Patron, you'll be asked to select a patron (enter/scan number or enter name). If you select Inventory Item, you'll be asked

to select an inventory item (enter/scan barcode number or enter title).

Patron Status

If you selected Patron and the patron has items checked out, a list of the barcodes, titles, dates checked out and due dates will appear in the bottom half of the screen. If there are more than will fit in the window, you can use the PGUP and PGDN keys to "page" through the list.

Inventory Item Status

If you selected Inventory Item, list of all copies of the item will appear at the bottom half of the screen. The list includes barcodes, status codes (out, in, holding for reservation, lost, etc.), patron numbers and names of the persons to whom the item is checked out (if any) and due dates (if applicable). If there are more copies than will fit in the window, you can use the PGUP and PGDN keys to "page" through the list.

Fines..... This feature allows you to collect fines from patrons who have a balance due.

You cannot use this feature to collect fines if the patron's fines balance is zero. Fines on overdue items are charged at the time the item is checked in.

If you want to make a direct adjustment to the patron's fines balance, use the Ledger feature of the Enter/Edit Patrons menu.

Select a Patron

You are asked to select a patron by entering or scanning the patron's number or entering the patron's name.

Enter the Amount Collected

A window will appear showing the current balance due and asking you to enter the amount you are collecting.

If you collected a fine payment from the patron, a summary of the transaction will appear in the Last Five Transactions screen.

Lock..... This feature allows you to "lock" the keyboard to prevent others from using the system in your absence. This feature is available only if you have set up at least one password (security code) using the Passwords feature of the Maintenance menu.

When you select Lock, a "key" will appear on the screen and you will be asked to enter a valid security code. The system is "locked" and cannot be used until a valid security code is entered.

Exit Returns to the Circulation menu.

Circulating Periodicals

You do not need to add all new periodicals (such as magazines and newsletters) and vertical file folders to your *Surpass/2* inventory collection if you want to use *Surpass/2* to control their circulation. There are two methods for circulating these odd materials: they may be added "on-the-fly" as you check them out or you may use a set of file folders to circulate any odd items.

Adding Items On-The-Fly

You can check materials that are not a normal part of your *Surpass/2* inventory by adding them as they are checked out. This is done by using the Pre-Print Barcode Labels feature of the Labels & Cards menu to print a number of blank barcode labels.

These labels are kept at the circulation desk. When a patron comes to the desk with a periodical that has not been added to *Surpass/2*, one of these labels is attached to the item before it is checked out. When you attempt to check out an item with an unused barcode number, *Surpass/2* allows you to add the item as it is checked out.

Use the following procedure to circulate odd materials this way:

1. Go to the Inventory menu and select the Labels & Cards feature.

2. From the Labels & Cards menu, select Pre-Print Barcode Labels.
3. You will be asked to enter a range of barcode numbers. Select a range of numbers which has not been used and which will not interfere with the barcode numbers of books you might add in the future.

This is an important point. You can "pre-print" barcode labels for any range, regardless of whether the barcode numbers have already been assigned to books, but you shouldn't use these labels for periodicals.

You should also remember that, when you add a new book and do not specify a barcode number, *Surpass/2* will look for the highest barcode number in use and add one to it to get the new barcode number. This could cause a conflict with pre-printed barcode labels because the new book's barcode number could be the same as one you have pre-printed for periodicals.

If you add books that have the same barcode numbers as any pre-printed periodical labels, you should discard the pre-printed labels to prevent you from accidentally checking out that book when you want to check out a new periodical.

You can prevent this from happening when you add a new book by giving that book a barcode number higher than the highest pre-printed barcode label. Since *Surpass/2* always adds one to the highest barcode number when you let it assign a number, it will skip over the pre-printed barcode range the next time you add a book.

4. When a patron wishes to check out a new periodical (one that does not have a barcode label), attach one of the pre-printed labels to it and begin to check it out.
5. *Surpass/2* detects that this is a new barcode number, it will display a dialog box asking, "This item is not on file. Do you want to add it?" Answer "yes" if you want to add the new periodical.
6. *Surpass/2* will then allow you to enter the title and category code and will automatically add the item to inventory at that time. If you want to enter more cataloging information, that can be done later using the Enter/Edit Items feature of the Inventory menu.

Now that the item has been given a barcode label and added to the inventory, it is handled as any other "normal" inventory item. You can check it in and out again just as you would a book.

Using File Folders

An alternative method for checking out odd materials like periodicals is to make a set of folders that can be repeatedly used to check out these items.

These folders are added to *Surpass/2* as if they were books and are given barcode numbers. When an odd item is checked out, it is placed in one of these folders, its title or description is written on the folder and it is checked out as normal. When it returns, the folder is checked in and its contents are returned to the shelves.

Use the following procedure to circulate odd materials using file folders:

1. Select the Enter/Edit Items feature of the Inventory menu.
2. Add a number of "dummy" books giving them titles such as "Miscellaneous Periodicals" or "File Folder 1."
3. Print barcode labels for the folders using the Barcode Labels feature of the Labels & Cards menu and attach the labels to the folders.
4. When a patron wishes to check out a non-inventoried odd item, place it in the folder, write the title or description on the folder and check the folder out as normal.
5. When the folder returns, check it in as normal, mark out the title or description and return its contents to the shelves.

This method is faster and easier than the pre-printed barcode method and it doesn't add a lot of odd items to your permanent *Surpass/2* inventory. However, it does not let you know the exact contents of the folders that have been checked out before they return and it does not allow you to produce circulation reports based on the contents of the folders.

Reports

The Circulation Reports menu allows you to print reports related to circulation. The circulation reports are:

- Circ. Summary** Prints a list of circulation transactions which occurred on a single day or within a range of dates.
- Overdue Notices**..... Prints overdue notices.
- Overdue List** Prints a list of all overdue items.
- Reserve Notices** Prints notices for patrons who have reserved items which are now available in the library.
- Reserve Report** Prints a list of all reserved items.
- Reserve Analysis** Prints a list of inventory items which have been reserved a certain number of times.
- Renewal Analysis** Prints a list of inventory items which have been renewed a certain number of times.
- Circ. Analysis**..... Prints a list of inventory items which have circulated a given number of times during a specific range of dates.

Circulation Summary

This report will print a list of all check-in's, check-out's, renewals, fines charged and fines collected for a given date or for a given range of dates. This is especially useful for daily, weekly or monthly reporting.

There are five reports that can be printed as part of the Circulation Summary:

- Checked Out** Lists each item that was checked out within a range of dates. This report includes the date, time, barcode number and due date for each item checked out. It

may optionally include the patron's number and name.

Checked In Lists each item that was checked in within a range of dates. This report includes the date, time, barcode number and due date for each item checked in. It may optionally include the patron's number and name.

Items Renewed Lists each item that was renewed within a range of dates. This report includes the date, time, barcode number and due date for each item renewed. It may optionally include the patron's number and name.

Fines Charged Lists each fine charged within a range of dates and provides a total of the fines charged. This report includes the date, description and amount of each fine charged. It may optionally include the patron's number and name.

Payments List each payment collected (fines, etc.) within a range of dates and prints the total amount collected. This report includes the date, description and amount of each payment received. It may optionally include the patron's number and name.

When you select the Circulation Summary report, you will be asked to enter a starting and ending date. If you want to print the reports for a single date, just enter the same date for the start and end.

You are then asked to specify which report(s) you want to print by putting a `Y' (yes) or `N' (no) to the right of each report name. The bottom of the screen asks whether you want to include patron names on the reports, but you should consider the patrons' rights to privacy before you use this feature.

After you have entered the date range and selected the report(s) to print, you will be asked if you are ready to begin. Take this time to check the selections you have made. If you need to change them, answer "no" and you will be allowed to change the date range and/or change the selected reports. Otherwise, answer "yes" to continue.

You will then be asked to load the proper type of paper in your printer and to put your printer on-line. Press any key to begin printing the report.

If you press ESC before the report begins printing, you will be returned to the Circulation Reports menu. If you press ESC while the report is being printed, a dialog box will appear asking you if you want to stop printing. If you answer "yes," you will be returned to the Circulation Reports menu. Otherwise, the report will continue printing from where it was stopped.

Overdue Notices

The Overdue Notices feature of the Circulation Reports menu allows you to print notices to patrons who have overdue items.

Each overdue notice includes the patron's number, name and homeroom, today's date, a message and a list of overdue items and due dates. The notices are sorted by local address (homeroom) to make it easy to distribute them to patrons.

When you select Overdue Notices, a window will appear with the current wording of the overdue notice text. This is the text that will be printed at the top of each notice. You may change the message to suit your own preferences.

To change the message, answer "yes" to the "Do you want to change the text on the notice?" question. You will then be allowed to edit the message text. Press PGDN when you are finished editing.

When you answer "no" to the "change the text..." question you will then be asked to load the proper type of paper in your printer and to put your printer on-line. Press any key to begin printing the notices.

If you press ESC before the notices begin printing, you will be returned to the Circulation Reports menu. If you press ESC while the notices are being printed, a dialog box will appear asking you if you want to stop printing. If you answer "yes," you will be returned to the Circulation Reports menu. Otherwise, the notices will continue printing from where they were stopped.

Overdue notices are designed to print on 8-1/2" by 5-1/2" paper. You may use standard 8-1/2" by 11" paper. If you use standard paper, two notices

will be printed on each page. You may then use scissors or a paper cutter to cut the sheets in half.

Overdue List

The Overdue List feature of the Circulation Reports menu prints a list of all patrons who have overdue items and a list of the overdue items for each patron. The report is sorted by local address (homeroom) with each new address beginning on a new page.

You will be asked to load the proper type of paper in your printer and to put your printer on-line. Press any key to begin printing the report.

If you press ESC before the report begins printing, you will be returned to the Circulation Reports menu. If you press ESC while the report is being printed, a dialog box will appear asking you if you want to stop printing. If you answer "yes," you will be returned to the Circulation Reports menu. Otherwise, the report will continue printing from where it was stopped.

Reserve Notices

The Reserve Notices feature of the Circulation Reports menu allows you to print notices to patrons who have reserved items which are now holding for them in the library.

Each reserve notice includes the patron's number, name and homeroom, today's date, a message and a list of the reserved items being held for them. The notices are sorted by local address (homeroom) to make it easy to distribute them to patrons.

When you select Reserve Notices, a window will appear with the current wording of the reserve notice text. This is the text that will be printed at the top of each notice. You may change the message to suit your own preferences.

To change the message, answer "yes" to the "Do you want to change the text on the notice?" question. You will then be allowed to edit the message text. Press PGDN when you are finished editing.

After editing the notice text and/or answering "no" to the "change the text..." question, a dialog box will appear asking whether you want to drop patrons who have already been notified.

This feature allows you to release the "hold" on items if a patron has not checked the item out since the notice was sent to him or her. The holding item is then "given" to the next person having a reservation for the item (if any). If there are no other patron's waiting for the item, it is released from the reservation file and may return to the shelves for general circulation. All this happens when you answer "yes" to the "Do you want to drop patrons who have already been notified..." question.

If you answer "no" to the question, no changes will be made to the reservations and the patron will continue to receive notices until he or she checks the item out. The item will not be available to other patrons until this patron checks out and returns the reserved item.

You will then be asked to load the printer with the proper size paper and to press any key to begin printing. Make sure your printer is loaded, on-line and set to the top-of-page. Press any key to begin printing the reserve notices.

If you press ESC before the report begins printing, you will be returned to the Circulation Reports menu. If you press ESC while the notices are being printed, a dialog box will appear asking you if you want to stop printing. If you answer "yes," you will be returned to the Circulation Reports menu. Otherwise, the notices will continue printing from where they were stopped.

Reserve notices are designed to print on 8-1/2" by 5-1/2" paper. You may use standard 8-1/2" by 11" paper. If you use standard paper, two notices will be printed on each page. You may then use scissors or a paper cutter to cut the sheets in half.

Reserve Report

The Reserve Report feature of the Circulation Reports menu prints a list of all reservations.

The Reserve Report includes the following information:

Title The title of the reserved item.

Patron..... The patron's number and name.

Date The date the item was reserved for this patron.

Status..... The current status of the reservation. This may include any of the following:

Reserved: The item has been reserved for this patron and is not yet available for him or her to check out.

Holding (date): The item was checked in on this date and is now holding for this patron but the patron has not yet been sent a reserve notice for this item.

Notified (date): The item has been holding for this patron and the patron was notified on this date.

When you select Reserve Report, you will be asked to load the proper type of paper in your printer and to put your printer on-line. Press any key to begin printing the report.

If you press ESC before the report begins printing, you will be returned to the Circulation Reports menu. If you press ESC while the report is being printed, a dialog box will appear asking you if you want to stop printing. If you answer "yes," you will be returned to the Circulation Reports menu. Otherwise, the report will continue printing from where it was stopped.

Reserve Analysis

The Reserve Analysis feature of the Circulation Reports menu prints a list of all items that have been reserved a given number of times or those that have been reserved within a given range. Its main use is to help you locate those items that have been reserved a high number of times and for which you might want to purchase additional copies.

When you select Reserve Analysis from the Circulation Reports menu, you are asked for the following information:

Sort field The MARC field tag to use for sorting. Enter the number of the MARC field to be used when sorting the report. For example, to sort the report by local call number, enter "900" in the Sort field.

If you do not remember the MARC tag numbers, press the F10 key to display and select from a list of sortable MARC fields.

Lowest Print only those items which have been reserved *at least* this number of times. For example, to print items that have been reserved at least 10 times, enter "10" in this field.

Highest Print only those items which have been reserved *not more* than this number of times. For example, to print items that have been reserved at least 10 times but not more than 50 times, enter "10" in the Lowest field and "50" in the Highest field.

After you have selected a sort field and entered the reservation count range, you will be asked whether you are ready to continue. If you answer "no" to this question, you will be allowed to make changes to the sort field and reservation count range. When you answer "yes" to this question, you are ready to print the report.

You will then be asked to load the proper type of paper in your printer and to put your printer on-line. Press any key to begin printing the report.

If you press ESC before the report begins printing, you will be returned to the Circulation Reports menu. If you press ESC while the report is being printed, a dialog box will appear asking you if you want to stop printing. If you answer "yes," you will be returned to the Circulation Reports menu. Otherwise, the report will continue printing from where it was stopped.

The Lowest and Highest fields are based on the total number of reservations made since you began using *Surpass/2*. This could be one week, one year or ten years depending on how long you have been using *Surpass/2*.

The reservation report prints the local call number (Field 900), title statement (Field 245) and the number of times each item has been reserved.

Renewal Analysis

The Renewal Analysis feature of the Circulation Reports menu prints a list of all items that have been renewed a given number of times or those that have been renewed within a given range. Its main use is to help you locate those items that have been renewed a high number of times and for which you might want to extend the normal loan period.

When you select Renewal Analysis from the Circulation Reports menu, you are asked for the following information:

Sort field..... The MARC field tag to use for sorting. Enter the number of the MARC field to be used when sorting the report. For example, to sort the report by local call number, enter "900" in the Sort field.

If you do not remember the MARC tag numbers, press the F10 key to display and select from a list of sortable MARC fields.

Lowest Print only those items which have been renewed *at least* this number of times. For example, to print items that have been renewed at least 10 times, enter "10" in this field.

Highest Print only those items which have been renewed *not more* than this number of times. For example, to print items that have been renewed at least 10 times but not more than 50 times, enter "10" in the Lowest field and "50" in the Highest field.

After you have selected a sort field and entered the renewal count range, you will be asked whether you are ready to continue. If you answer "no" to this question, you will be allowed to make changes to the sort field and renewal count range. When you answer "yes" to this question, you are ready to print the report.

You will then be asked to load the proper type of paper in your printer and to put your printer on-line. Press any key to begin printing the report.

If you press ESC before the report begins printing, you will be returned to the Circulation Reports menu. If you press ESC while the report is being

printed, a dialog box will appear asking you if you want to stop printing. If you answer "yes," you will be returned to the Circulation Reports menu. Otherwise, the report will continue printing from where it was stopped.

The Lowest and Highest fields are based on the total number of renewals made since you began using *Surpass/2*. This could be one week, one year or ten years depending on how long you have been using *Surpass/2*.

The renewal report prints the local call number (Field 900), title statement (Field 245) and the number of times each item has been renewed.

Circulation Analysis

The Circulation Analysis feature of the Circulation Reports menu prints a list of items and the number of times each item has circulated (been checked out) within a range of dates.

By specifying one or more ranges, you can limit the items to be printed by:

- The contents of any MARC field.

For example, you could print only those items having a local call numbers between 500 and 599.99.

- The dates the items were checked out.

For example, you could print only those items that checked out in the month of February 1991.

- The number of items the item has been checked out during the range of dates.

For example, you could print only those items that have been checked out more than 10 times during the month of February 1990.

When you select Circulation Analysis from the Circulation Reports menu, you are asked to enter the ranges for the report. The fields in this window are:

Range Field The MARC field tag number of the field by which you want to select a range.

For example, if you want to print only items having a local call number in the 500's, you would enter "900" here. (900 is the MARC field tag for local call number).

If you do not remember the MARC field tag number of your desired range field, press the F10 key when the cursor is in the Range field. A window will appear on the screen showing a list of MARC field tags. Use the arrow keys to move the highlight to the desired MARC field and press ENTER.

The contents of the field you select will be printed for each item on the report. For example, if you selected Field 245 (title statement), titles will be printed on the report; if you selected 900 (local call number), local call numbers will be printed on the report.

Start With The first item to print based on the Range Field.

If, for example, you want to print a list of items having a local call number in the 500's, you would enter "900" in the Range field (the MARC field tag for local call number) and "500" in the Start With field (the starting point of the Dewey 500's).

End With The last item to print based on the Range Field.

Using the above example (printing only Dewey 500's), you would enter "900" in the Range field, "500" in the Start With field and "599.999" in the End With field.

Hint: When deciding whether to print an item on the report, *Surpass/2* compares the contents of each field, letter-by-letter, number-by-number, up to the number of characters you put in the Start With and End With Fields. Therefore, we could have put "5" in the Start With field (the first number of the local

call number must be "5" or higher) and "5" in the End With field (the first number of the local call number must be "5" or lower).

Starting Circ Date .. The starting circulation (check out) date to use when figuring the number of times each item has circulated.

For example, to count the number of times each item was circulated in February 1990, you would enter "02/01/1991" in this field (the first day of February).

When *Surpass/2* is counting the number of times an item was checked out, it will ignore all check out dates prior to the date you enter here.

Ending Circ Date The ending circulation (check out) date to use when figuring the number of times each item has circulated.

For example, to count the number of times each item was circulated in February 1990, you would enter "02/01/1991" in the Starting Circulation Date field and "02/28/1991" in the Ending Circulation Date field.

When *Surpass/2* is counting the number of times an item was checked out, it will ignore all check out dates after to the date you enter here.

Note: *Surpass/2* maintains a history of all circulation transactions (as can be seen in the Enter/Edit Patrons screen's Status:History feature). The Circulation Analysis uses this transaction history information. The Circulation Analysis report uses this information. If you have used the Purge Files:Closed Transactions feature of the Maintenance menu, the purged check-out transactions will not be reflected on this report. (See "Purge Files" starting on Page 229.)

Lowest Count Only those items that have been checked out *at least* this many times during the date range will be printed on the report.

For example, to print a list of items that have circulated at least 10 times in February 1990, you would enter the starting and ending days of February 1990 in the Starting and Ending Circulation Date fields and "10" in the Lowest Circulation Count field.

Highest Count Only those items that have been checked out *not more than* this many times during the date range will be printed on the report.

For example, to print a list of items that have circulated at least 10 times but not more than 20 times in February 1990, you would enter the starting and ending days of February 1990 in the Starting and Ending Circulation Date fields, "10" in the Lowest Circulation Count field and "20" in the Highest Count field.

After you enter the ranges, you will be asked whether you are ready to continue. If you answer "no" to this question, you will be allowed to make changes to the range fields. When you answer "yes" to this question, you are ready to print the report.

You will then be asked to load the proper type of paper in your printer and to put your printer on-line. Press any key to begin printing the report.

Before the report begins printing, *Surpass/2* "compiles" the information from the circulation history file. This could take a fair amount of time depending on the number of transactions stored in your computer.

If you press ESC before the report begins printing, you will be returned to the Circulation Reports menu. If you press ESC while the report is being printed, a dialog box will appear asking you if you want to stop printing. If you answer "yes," you will be returned to the Circulation Reports menu. Otherwise, the report will continue printing from where it was stopped.

The report will list the barcode number and circulation count for the selected items. It will also show the contents of the field you specified as

the Range Field. For instance, if you selected Field 2 (Author), the report would list the barcode number, author and circulation count for each selected item. There is an exception: if you use a barcode number range, the report will print the barcode number, *title* and circulation count.

The Circulation Analysis report has many possibilities and can help you answer numerous questions about how your library's circulation:

- What are the most popular authors?
- How popular are the books purchased this year?
- How popular are books purchased five years ago?
- What books haven't been checked out for over four years?
- What are the hottest subjects?
- What are the most popular new books?
- Which vendor's books are the most popular?
- How are the books I bought with that PTA donation doing?



Maintenance

The features in the Maintenance menu allow you to fine tune the way your computer and *Surpass/2* work together and to perform some of the regular maintenance chores to keep your system running in top shape.

The Maintenance menu has the following features:

- Current Status** Shows the number of volumes and patrons and the version number of the *Surpass/2* software in use.
- System Setup**..... Allows you to fine-tune the way *Surpass/2* works in your library and to tell *Surpass/2* the type of printer you are using.
- Passwords**..... Allows you to change passwords and to tell *Surpass/2* which users are allowed to access certain parts of the *Surpass/2* software.
- File Maintenance** Allows you to index (sort) and/or pack (remove deleted records from) the database files used by *Surpass/2*.
- Keywords** Allows you to build a table of keywords for use by the *Surpass/2 Catalog* software.
- Purge Files** Allows you to permanently remove out-dated records from the files that contain circulation history and fines, charges and payments.
- Key Field Table** Allows you to re-build the table that *Surpass/2* uses when you search for books by title, author, call number and other sortable/searchable fields.
- End of Year** Allows you to perform year-end processing to remove graduating patrons and advance other patrons' grade levels.

Current Status

The Current Status feature of the Maintenance menu displays a window showing the following:

Version The version number of the *Surpass/2* software. This number changes each time a new version of *Surpass/2* is released. You will be asked for the version number if you should ever need to call Customer Support for assistance.

Volume Records The number of volumes (including all copies of all titles) in your *Surpass/2* inventory.

The number shown in this field includes deleted volumes and, therefore, could be higher than the actual number of volumes in your library. It is, however, 100% accurate after you have "packed" the Copy Control Records file using the File Maintenance feature. (See File Maintenance starting on Page 221.)

Patron Records The number of patron records stored in your *Surpass/2* system.

The number shown in this field includes deleted patron records and, therefore, could be higher than the actual number of patrons. It is, however, 100% accurate after you have "packed" the Patron Records file using the File Maintenance feature. (See Page 221.)

This feature does not require any input from you other than to ask you to press any key to return to the Maintenance menu.

System Setup

The System Setup feature of the Maintenance menu allows you to change the way *Surpass/2* works in your library.

When you select System Setup from the Maintenance menu, the System Setup menu appears with the following options:

Facility Calendar Allows you to set the open and closing dates of your library.

Circulation Categories

Allows you to define circulation categories.

Maximum Items on Loan

Allows you to set the maximum number of items patrons are allowed to have checked out.

MARC Tags Allows you to add and/or change the definitions of MARC fields.

Select Printer Allows you to tell *Surpass/2* what type printer you are using.

Define Patron Fields

Allows you to define up to three special-purpose patron fields.

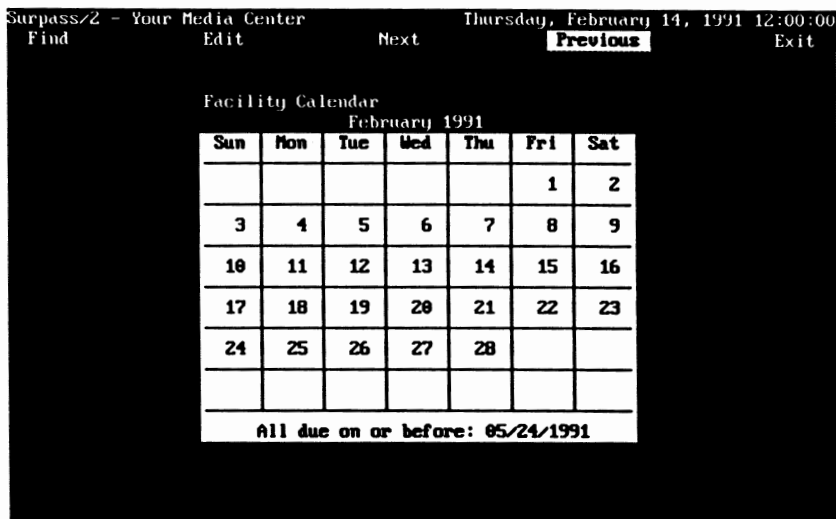
System Preferences.

Allows you to customize the behavior of *Surpass/2*.

Facility Calendar

The Facility Calendar allows you to define the operating dates of your library or media center. This information is used by *Surpass/2* when automatically calculating due dates and when calculating fines for overdue items.

When you select Facility Calendar from the System Setup menu, *Surpass/2* displays the current month's calendar and the Facility Calendar menu.



Facility Calendar window

Dates appearing in red (or bright on monochrome monitors) are dates when your media center will be closed. When automatically calculating due dates, *Surpass/2* will never make an item due on a weekend, holiday or other closed day. When calculating fines for overdue items, *Surpass/2* will not charge for weekends, holidays and other closed days.

The date field at the bottom of the calendar window, "All due on or before" contains the date when all items must be returned to the library. In more practical terms, this is the date when your library will close for the year. No automatically calculated due date will be allowed to fall after this date. There is only one "all due" date and it doesn't change as you display different months.

Note: Using the Manual Due Date feature of the Circulation Transactions menu allows you to override weekends, holidays and the "all due" date when checking out or renewing.

Facility Calendar Menu Functions

The following menu features are available in the Facility Calendar menu:

Find Allows you to display a different calendar month.

When you select Find, you are asked to enter the month and year. When you press ENTER, the calendar is displayed for the month and year you entered.

Edit.....Allows you to make changes to the open/closed dates on the calendar and to change the "all due" date.

When you select Edit, a menu appears to ask you which part of the calendar you want to edit.

Days of Month

Select Days of Month from the Edit menu to change the individual days of the month. A field will appear to the left of each date. Put an `X' next to days when the media center will be closed and an empty space next to days when it will be open.

Days of Week

Select Days of Week from the Edit menu to change the days of the week. The closed days of the week override closed/open days entered using the Days of Month feature.

Put an `X' next to the days of the week when your library will be always be closed and a blank space next to those when your library will be open.

In most cases, you will tell *Surpass/2* that your library is closed on Sundays and Saturdays. If the library is open on Saturdays, you would want to put a blank space next to "Sat".

Note: The selected days of the week affect the *entire* calendar--not just the displayed month.

Last Due Date

Select Last Due Date from the Edit menu to change the final due date of the year. The date entered here overrides all automatically calculated due dates. It is most commonly set to the end of the school year or to a day before an extended holiday (such as Spring Break).

For example, if a book was checked out two days before the "all due" date and would normally be due in two weeks, the actual due date would be the "all due" date.

Next Displays the calendar for the next month. The down arrow key can also be used to display the next month.

Previous..... Displays the calendar for the previous month. The up arrow key can also be used to display the previous month.

Exit Returns to the System Setup menu.

Circulation Categories

The Circulation Categories feature of the System Setup menu allows you to define new categories and to change the circulation period, renewal limit, grace days, daily fine amount, maximum fine and catalog card color codes of existing categories.

When books and other items are entered into *Surpass/2* they are categorized based on the code you enter in the Category field (MARC field tag 910). This code is used by *Surpass/2* to determine the loan period, fine rate, maximum fine, grace days and renewal limit of the item being checked out or renewed. The Circulation Categories feature allows you to change these figures for individual circulation categories.

You should set of a unique category for each group of items in your inventory that circulate differently from other groups. The category codes are also used to group together and count items by category in certain reports.

Each category is given a unique, one- to five-character code which may contain any combination of letters and numbers. Below are some examples of category codes:

PBACK Paperback book
HBACK..... Hardback book
VERT Vertical file
REF Reference

BIBBiography
 PROFProfessional collection
 FS.....Filmstrip
 VHS VHS video tape
 LDISC Laser videodisc
 16MM 16mm film
 KITKit
 MAG.....Magazine
 SOFT.....Computer software
 CD.....Compact audio disc
 CASSAudio cassette

These are just examples. The number of categories you use, their codes and their definitions are totally up to you.

When you select Circulation Categories, you will see a window where you may add or edit the properties of each individual Category Code. The window displays one category code definition at a time.

Surpass/2 - Your Media Center Thursday, February 14, 1991 12:00:00

Add **Find** Edit Delete List Next Previous Exit

Circulation Categories

Category Code: HB Desc: Hardback Book

Prefix for importing: Max fine: 100% of cost of item

Loan Periods

	Kinder	1	2	3	4	5	6	7
Days	0	0	0	0	0	14	14	14
Renews	0	0	0	0	0	1	1	1
Grace	0	0	0	0	0	0	0	0
Fine	0.00	0.00	0.00	0.00	0.00	0.05	0.05	0.05

	8	9	10	11	12	Normal	Staff	Inactu	Other
	14	14	14	14	14	0	356	0	0
	1	1	1	1	1	0	1	0	0
	0	0	0	0	0	0	0	0	0
	0.05	0.05	0.05	0.05	0.05	0.00	0.00	0.00	0.00

Catalog Card Color Code

Circulation Categories window

Circulation Categories Fields

The fields on the Circulation Categories window are:

Category Code The category code.

Category codes may be up to five characters long. There should be one unique category code for each different category used in your collection inventory.

For example, to add a new category for VHS videocassettes, you might put "VHS" into this field.

Desc The long description of the category code.

Example: for the "VHS" category, you might put "VHS videocassette" in this field.

Prefix This field is not currently used by *Surpass/2*. In future versions, the contents of this field will be used to help the Inventory menu's Import feature determine the circulation category of items read from MARC and MicroLIF disks. You can leave this field blank for now.

Max fine The maximum overdue fine to be charged for items in this category.

The maximum fine is entered as a percentage of the actual cost of the item and can be from 0% (for no limit) to 1% (1% of the cost of the item) to 999% (999% of the cost).

For example, if you never want to charge a fine greater than the actual cost of the item, you would set the Max Fine to be 100%. Then, a patron would never be charged more than what you paid for the item. If an item has a cost of \$0.00 (meaning you probably didn't supply the cost when you added the item), the maximum fine will be ignored.

The next fields, Days, Renewals, Grace and Fine, are set up for each individual patron type (kindergarten, grades 1 through 12, normal, staff, inactive and other).

As you edit these fields, the cursor moves from left to right when you move from one field to another. For example, When you press ENTER after

editing the Days field for kindergarten, the cursor moves to the Days field for Grade 1. When you press ENTER after editing the last Days field (under "Other"), the cursor moves to the Renews field for kindergarten.

Days..... The number of days each patron type is allowed to keep items in this category (the loan period).

For each type of patron (kindergarten, grades 1 through 12, normal, staff, inactive and other), you specify the number of days the patrons of each type may keep items with this category code. A zero under a patron type means that this patron is not allowed to check out these items. This, of course, may be overridden by entering a manual due date when checking out (if the user's security level allows).

Renews The the number of times each type of patron is allowed to renew items in this category.

If the limit is zero under a patron type, the patron is not allowed to renew items in this category unless approved by a user with the proper security level. You may specify which users can override this limit in the Circulation Access feature of the Passwords menu.

Grace..... The number of days each type of patron may have an overdue item in this category before fines are charged.

This allows you to give your patrons a day or two of grace before you start charging fines. A zero in this field means that this type of patron will be charged fines for overdue items starting on the first day after the due date.

Fine The daily fine rate for each patron type.

For example, you might want to charge a higher rate for videotapes than for paperback books. And you might not want to charge fines to the staff.

Card Color Code..... The color code (if any) to be displayed on catalog cards for items in this category, appearing on the optional *Surpass/2 Catalog* public-access computer catalog software.

This feature allows you to duplicate the color codes used in your traditional card catalog. For example, if you color coded A/V materials by putting a red line at the top of the catalog card, you would put an `R' in this field for all A/V materials. When the items are displayed as catalog cards in the *Surpass/2 Catalog* program, a red line will appear at the top and bottom of the "card."

Colors are specified using a one-letter color code: `B' for blue, `G' for green, `C' for cyan (light blue), `R' for red, `M' for magenta (violet) and `O' for brown. Leave this field blank if you do not want to color code this category.

If you will not be using *Surpass/2 Catalog* or you will be using it on monochrome (non-color) monitors, you will not need to be concerned with color codes. They are used only by *Surpass/2 Catalog* when it is run on color monitors.

There is one special category code that cannot be deleted. This is "DEFLT" (default). The figures in the default category code are used when an item has no category code or if an item has a category code which has not been defined. It is a good idea to set the Days fields in the default category code to zero. This will serve to alert you, when checking out, that the item does not have a category code or that it has a category code which has not been defined.

Circulation Categories Menu Functions

The following features are available in the Circulation Categories menu:

Add Allows you to add a new circulation category definition.

Find Allows you to find and display an existing circulation category definition. You are asked to enter the

circulation category code. If it is found, the category information is displayed in the window.

Edit.....Allows you to make changes to the currently displayed category.

The Edit feature is available only when a category code definition is displayed in the window. Use the Find or List features to locate and display a category.

You cannot directly edit the category code of a category. You should, instead, add a new category definition (with the new code) and delete the old category definition.

Delete Allows you to delete the currently displayed category.

The Delete feature is available only when a category code definition is displayed in the window. Use the Find or List features to locate and display a category.

ListDisplays a selection list of existing category codes.

You may use the up and down arrow keys to scroll through the list and select a category. Press the ENTER key to display the information for the selected category in the window.

NextDisplays the next category code definition in alphabetical order. If there was no category code displayed in the window, Next will display the first category.

The down arrow key may also be used to display the next category code.

PreviousDisplays the previous category code definition in alphabetical order. If there was no category code displayed in the window, Previous will display the last category.

The up arrow key may also be used to display the previous category code.

Exit Returns to the System Setup menu.

Maximum Items on Loan

The Maximum Items on Loan feature of the System Setup menu allows you to set the maximum number of books or other items that can be checked out to a patron at one time.

Maximum Items on Loan					
Kinder:	5	Grade 6:	5	Grade 12:	5
Grade 1:	5	Grade 7:	5	Normal:	5
Grade 2:	5	Grade 8:	5	Staff:	0
Grade 3:	5	Grade 9:	5	Inactive:	5
Grade 4:	5	Grade 10:	5	Other:	5
Grade 5:	5	Grade 11:	5		

Maximum Items on Loan window

Maximum Items on Loan Fields

The Maximum Items on Loan window has 17 fields. There is one field for each patron type: kindergarten, grades 1 through 12, normal, staff, inactive and other.

The numbers next to each patron type are the maximum number of items that can be checked out at one time for each type of patron. For example, a "5" in the Grade 12 field tells *Surpass/2* to now allow any person in Grade 12 to have more than 5 books (or other items) out at any one time.

When you use the Circulation Transactions screen to check an item out to a patron, the computer finds the total number of items already out to that patron. If the patron has or will exceed his or her maximum, a dialog box will appear telling you so. Depending on your security level (see

"Passwords," Page 212), you may or may not be allowed to continue with the transaction.

Maximum Items on Loan Menu Functions

There are only two items in the Maximum Items on Loan menu:

Edit.....Allows you to change the maximum items on loan for each patron type.

Exit.....Returns to the System Setup menu.

MARC Tags

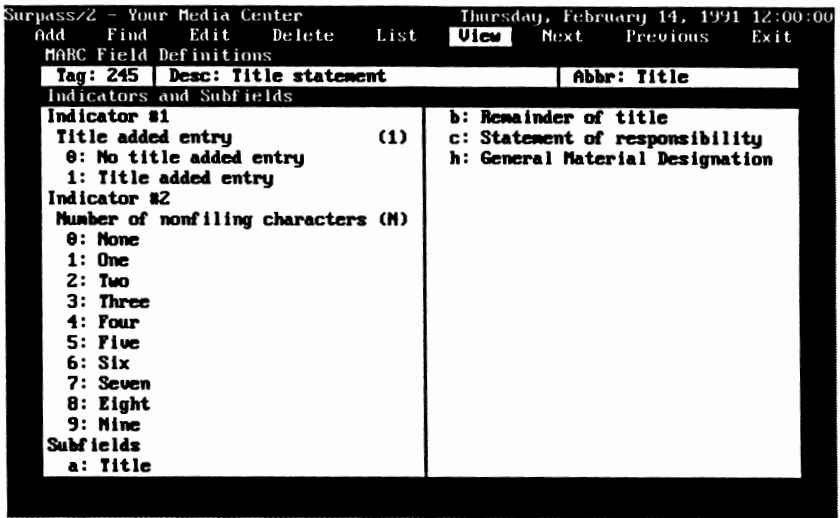
The MARC Tags feature of the System Setup menu allows you to define new MARC fields and change the definition of existing MARC fields.

When you installed *Surpass/2* on your computer, the definitions for the most often used MARC fields were automatically installed. In most cases, you will never need to change these definitions unless the Library of Congress defines new MARC fields or you want to add your own MARC fields.

Fields 900 and above are not defined by the Library of Congress and can therefore be defined by you for your own library's needs. Many of the 900 fields, however, have *de facto* standards defined by vendors of MicroLIF and MARC records. These include Field 901 which is reserved by *Surpass/2* for barcode numbers and Field 900 which is reserved for local call numbers.

In most cases, you will use the MARC Tags feature only to tell *Surpass/2* which fields are sortable (those that can be searched and those by which MARC records can be sorted), which fields appear on Abbreviated MARC displays, and which fields should be used when building the table of keywords.

Do not make any changes to the MARC field definitions unless you have a good working knowledge of the MARC specifications. Numerous publications about MARC are available from the Library of Congress.



MARC Field Definitions window (General View)

When you select MARC Tags from the System Setup menu, *Surpass/2* displays the MARC Field Definitions editing window. This window has four "views" that determine what and how information is displayed in the window. You change the "view" by using the View menu feature.

General..... Displays a summary of the indicators and subfields defined for the MARC field.

Indicators Displays the descriptions of the first and second MARC field indicators and different meaning of the contents of the indicators.

Subfields Displays a list of the names of each MARC subfield.

Field Information.... Displays a list of mostly "yes" and "no" questions that deal with the behavior of the MARC field.

MARC Tags Fields

MARC Tags Window Fields in All Views

The following three fields appear at the top of the MARC Field Definitions window regardless of the view:

Tag..... The three-digit MARC field tag. Each MARC field has a unique, three-digit tag number.

Tag numbers 001 through 899 are defined by the Library of Congress. Tag numbers 900, 901 and 910 are reserved for use by *Surpass/2* (they contain the local call number, the barcode number and the circulation category code). Fields 902 through 909 and 911 through 999 may be defined by the library.

For example, Tag 245 is defined by the Library of Congress to contain the title statement.

Desc The long description or name of the MARC field.

Abbr The short description or name of the MARC field.

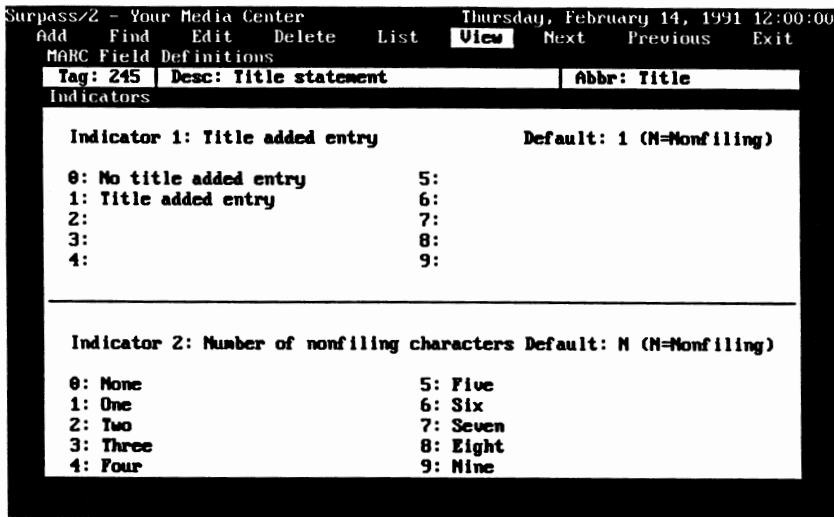
The abbreviated name is the one you see in the left column when you look at full or abbreviated MARC records using Enter/Edit Inventory.

Editing Fields in General View

The MARC Tags cannot be edited using the General View. If you select the Edit feature while in the General View, the window will switch to the Indicators View.

Editing Fields in Indicators View

The Indicators View allows you to make changes to the MARC field indicators. Each MARC field can have one or two indicators. These indicators contain a digit from 0 to 9 or they are blank. They describe in detail the source and type of the contents of the MARC field.



MARC Field Definitions window (Indicators View)

MARC fields 001 through 009 do not and cannot have indicators.

The following fields are available for each of the two indicators:

Indicator 1 (or 2)..... The description of the indicator.

This field is blank if the indicator is not defined for this MARC field.

Default..... The default value of this indicator.

When adding MARC records using the Enter/Edit Items feature of the Inventory menu, this will be the indicator of the field unless otherwise specified.

There is a special default used mostly in the 245 (title) field. This is the 'N' (non-filing) default indicator. When you add or change a field using the Enter/Edit Items feature of the Inventory menu and the field has a default indicator of 'N', *Surpass/2* will automatically count the number of non-filing characters and make that number the indicator.

For example, the 245 (title) field's second indicator is defined by the Library of Congress to contain the number of non-filing characters (the number of

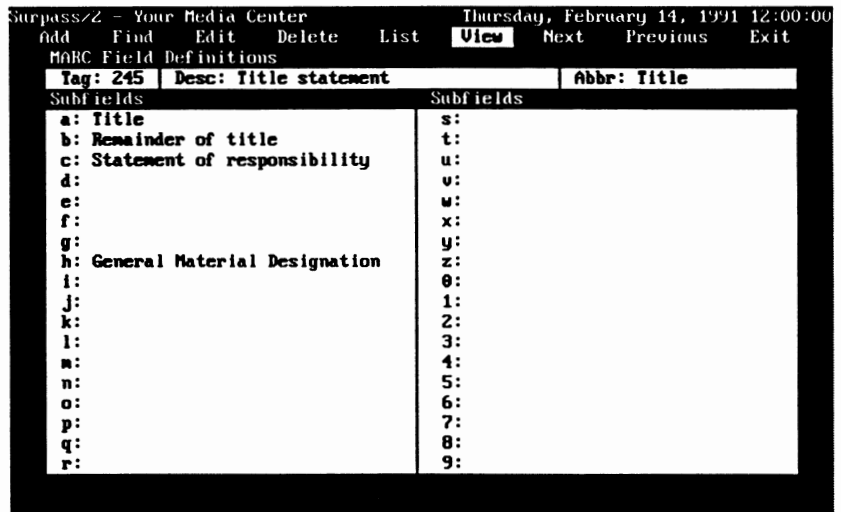
characters to ignore when sorting and searching for this field). If the title begins with the articles, "a," "an," or "the," the second indicator will automatically be 2, 3 or 4.

0-9..... The descriptions of each possible value for the indicator.

For example, a `2' in the second indicator of a title (245) field means that the first two characters of the title are not used when sorting and searching for titles.

Editing Fields in Subfields View

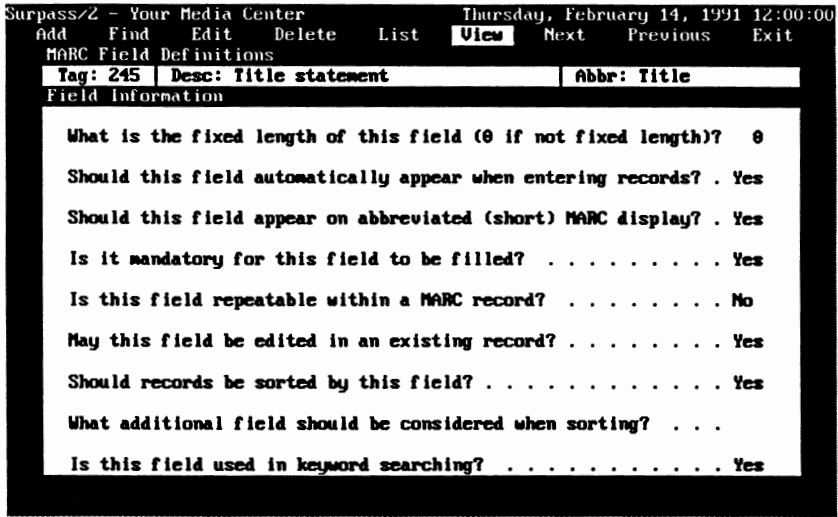
The Subfields View allows you to make changes to the names of each of the subfields for this MARC field. Each MARC field may have up to 36 defined subfields named `a' through `z' and `0' through `9'.



MARC Field Definitions window (Subfields View)

Editing Fields in Field Information View

The Field Information View allows you to make changes to the way *Surpass/2* handles individual MARC fields (such as whether they should be sorted and whether or not they contain keywords).



MARC Field Definitions window (Field Information View)

The following fields appear in the Field Information View window:

Fixed Length Contains the length (in characters) of the information to be contained in this field or a zero if the field has no fixed length.

Most MARC fields are variable-length. That means that they can contain titles, authors, subjects, etc. of any length. The 901 (barcode number) field has a fixed length of 10 because it can contain only barcode numbers 1 through 9999999999.

The value of the Fixed Length field should not be changed unless you have a good understanding of the MARC specification.

Automatically Appear

Determines whether a blank field automatically appears for editing when you add a new MARC record using the full or abbreviated MARC views of the Enter/Edit Items screen.

For example, since most items have a 245 (title) field, this field is automatically inserted when you

select Add from the Enter/Edit Items screen to add a new item in full or abbreviated MARC view.

Abbreviated Determines whether this field is displayed in the abbreviated MARC view of the Enter/Edit Items screen.

The abbreviated MARC view displays only the most important fields of the MARC record. What is "important" is up to you.

For example, you might not want to always see the ISBN number when you display a MARC record. Therefore, you would answer `N' (no) here for MARC Tag 020 (ISBN). You would probably always want to see the author and title in the abbreviated MARC view, so you would answer `Y' (yes) here for MARC Tags 100 and 245 (author and title).

Mandatory Determines whether each MARC record must have something in this field.

For example, each MARC record must have at least one barcode number (Field 901). Therefore the definition for the 901 field has a `Y' (yes) here. However, not all books have an ISSN number (Field 022), so it is not a mandatory field and the definition for 022 has an `N' (no) here.

Repeatable Determines whether this field may be repeated within a MARC record.

For example, each book can have only one LC number, therefore the definition for Field 050 (LC Number) has a `N' (no) here to prevent *Surpass/2* from allowing you to give a book more than one LC number. On the other hand, a book can have several topical subject headings (Field 650), so the definition for Field 650 has a `Y' (yes) here to allow you to enter more than one subject heading for a book.

May be Edited Determines whether the contents of this field may be changed after a book has been entered.

For example, once a book has been given a barcode number (in Field 901), the barcode number cannot be changed. Therefore, the definition for Field 901 has an `N' (no) here to prevent *Surpass/2* from allowing you to edit the barcode number once a book has been added. On the other hand, you should be freely allowed to make changes to a title statement. Therefore the title (245) field definition has a `Y' (yes) here to allow you to edit titles.

Sorted Determines whether records may be sorted by this field and whether you can find items based on this field.

A `Y' (yes) here tells *Surpass/2* that you want to be able to print reports sorted by the contents of this field and that you want to be able to use this field to find MARC records.

Surpass/2 is installed with the following MARC fields set to sortable/searchable:

- 100 Author
- 245 Title
- 600 Personal name subject
- 650 Topical subject
- 651 Geographical subject
- 900 Local call number
- 901 Barcode number
- 910 Circulation category code

You can make a MARC field sortable and searchable by putting a `Y' (yes) here. For example, you might want to be able to search for books by the LC number and to print lists sorted by LC number. To enable this you would put a `Y' here in the definition for Field 020 (LC Number).

Note: Changes made here take effect only after you have used the Key Field Table feature of the

Maintenance menu to re-build your table of searchable/sortable fields. In other words, if you make 020 (LC Number) searchable, you will only be able to look up items by LC Number after you have re-built your Key Field Table.

Each sortable/searchable field requires additional space on your hard disk. The amount of additional space needed is about 200 bytes (characters) per sortable field per MARC record. If, for example, your collection contains 10,000 MARC records, you will need to have at least 2 million bytes free on your hard disk (2 megabytes).

Additional Field For sortable/searchable fields, this determines what additional field should be sorted with this field.

For example, the definition for Field 100 (author) says that reports sorted by author should also be sorted by title (245). That is, the report will be sorted by author and each title for the author will also be in alphabetical order.

Keywords Determines whether the words contained in this field are to be used for keyword searching in *Surpass/2 Catalog*.

For example, if you want to be able to use *Surpass/2 Catalog* to search for keywords contained in the annotation field (Field 520), you would put a 'Y' (yes) here.

Notes: Changes made here become effective only after you have used the Keywords feature of the Maintenance menu to re-build your keyword table.

MARC Tags Menu Functions

The following features are available in the MARC Field Definitions menu:

Add.....Allows you to add a new MARC field definition.

When you select Add, you are automatically given a blank window in Indicators View. After you have filled in the blanks in this window, you are automatically taken to a blank Subfields View window and then to a blank Field Information window.

You can use the PGDN and PGUP keys to move to back to the previous or ahead to the next window when you are adding new MARC field definitions.

Find Allows you to find and display an existing MARC field definition. You are asked to enter the MARC field tag number. If it is found, the MARC field information is displayed in the window.

Edit Allows you to make changes to the currently displayed MARC field definition.

The Edit feature is available only when a MARC field definition is displayed in the window. Use the Find or List features to locate and display a MARC field definition.

If you are currently using the General View, you will be taken to the Indicators View for editing. Otherwise, you will be allowed to edit the information displayed in the current view.

You can use the PGDN and PGUP keys to move to back to the previous or ahead to the next window when you are editing MARC field definitions.

Some fields are defined by *Surpass/2* and do not allow you to change certain aspects of their definitions.

Delete Allows you to delete the currently displayed MARC field definition.

The Delete feature is available only when a MARC field definition is displayed in the window. Use the Find or List features to locate and display a MARC field.

ListDisplays a selection list of existing MARC field definitions.

You may use the up and down arrow keys to scroll through the list and select a MARC field. Press the ENTER key to display the definition of the selected MARC field in the window.

ViewAllows you to change a way a MARC field definition is displayed and to change which aspect of the definition is displayed.

When you select View, a menu appears allowing you to select "General," "Indicators," "Subfields" or "Field Information" views.

A shortcut key is displayed to the right of each item in the View menu. You can use these keys to immediately switch from one view to another without using the View function. For example, you can switch to Field Information View by pressing the F8 key--you do not have to select View from the MARC Field Definitions menu and then Field Information from the View menu.

NextDisplays the next MARC field definition in numerical order. If there was no MARC field displayed in the window, Next will display the first MARC field (001).

The down arrow key may also be used to display the next MARC field definition.

PreviousDisplays the previous MARC field definition in numerical order. If there was no MARC field displayed in the window, Previous will display the last MARC field (001).

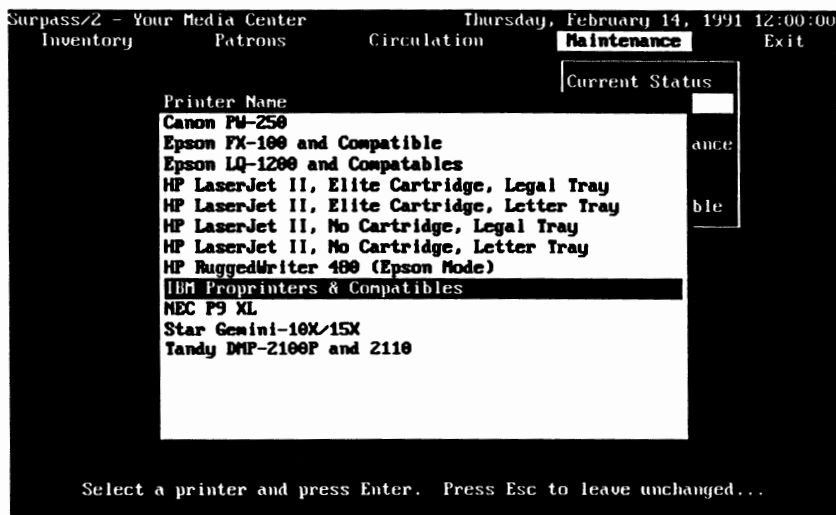
The up arrow key may also be used to display the previous MARC field definition.

Exit.....Returns to the System Setup menu.

Select Printer

The Select Printer feature of the System Setup menu allows you to tell *Surpass/2* which type printer you are using.

When printing barcodes and reports, *Surpass/2* sends commands to your printer to tell it do things such as "print this in pica print", "print a line here," and "go down 1/6 inch." Different printers "understand" different commands. The Select Printer feature allows you to tell *Surpass/2* how to "speak" to the printer.



Select Printer window

When you chose the Select Printer feature, a list of available printers is listed in a window. Use the up and down arrow keys to scroll through this list and highlight a printer. To make *Surpass/2* work with the selected printer, press the ENTER key. A dialog box will appear to ask you if you want to make *Surpass/2* work with this printer. Answer yes or no.

To return to the System Setup menu without changing your printer, press the ESC key.

If Your Printer is Not Listed

If the exact brand and model of your printer is not shown on the list of available printers, it still may be possible to make *Surpass/2* work with your printer. If your printer's brand name is listed but not the exact model

number, select a printer with the same brand name. If the brand name of your printer is not listed but your printer can "emulate" an Epson or IBM Proprinter (check your printer manual), select either one of the Epsoms or IBM Proprinters listed.

Special Note for Laser Printers

Surpass/2 supports the Hewlett-Packard LaserJet Series II, and other laser printers with are 100% compatible with the Series II. (This includes the Hewlett-Packard LaserJet IIP and LaserJet III).

There are four different printers listed for the LaserJet II. Each one is different depending on which (if any) options your printer has. Select the one that matches the options you have. These options are:

Elite Cartridge..... Allows the printer to print in 12-characters-per-inch.

Hewlett Packard font cartridges that allow elite printing include Prestige Elite (92286D), Legal Elite (92286G), Math Elite (92286J) and Prestige Elite Portrait & Landscape (92286M).

Letter Tray All LaserJet II's are shipped with a letter tray (the paper tray that contains 8-1/2" x 11" paper).

Legal Tray Allows the printer to use legal size paper (8-1/2" x 14"). If you have this paper tray for your printer, *Surpass/2* will allow you to print very wide reports (by orienting the print along the length of the page).

The legal tray is available from your Hewlett Packard dealer. Its catalog number is 92296C.

Define Patron Fields

There are three patron record fields that can be defined for your specific use. The Define Patron Fields feature of the System Setup menu allows you to set up the names of the fields and to define the type of information that will be contained in them.

Edit

Exit

Define User-Defined Patron Fields

Field	Description	Type (C/N)	Decimals
1	Parent Name	C Character	N/A
2	Emergency Phone	C Character	N/A
3		C Character	N/A

Define Patron Fields window

Each user-definable patron field has three aspects which you can set up:

Description The name of the field. This name will appear on the Enter/Edit Patrons screen and on patron reports.

Type The type of information of information to be contained in each user-definable field.

Enter a 'C' if you want to store characters (letters, words, numbers, etc.) in the user-definable field.
Enter an 'N' if you want to store numerals in the field.

Decimals The number of digits to the right of the decimal point for numeric fields.

Put a zero here if you want to store only integer numbers. If you will be entering dollar amounts in the user-definable field, put a two here (two digits to the right of the decimal point for cents). Decimals are not used in character fields and the number you put here will be ignored.

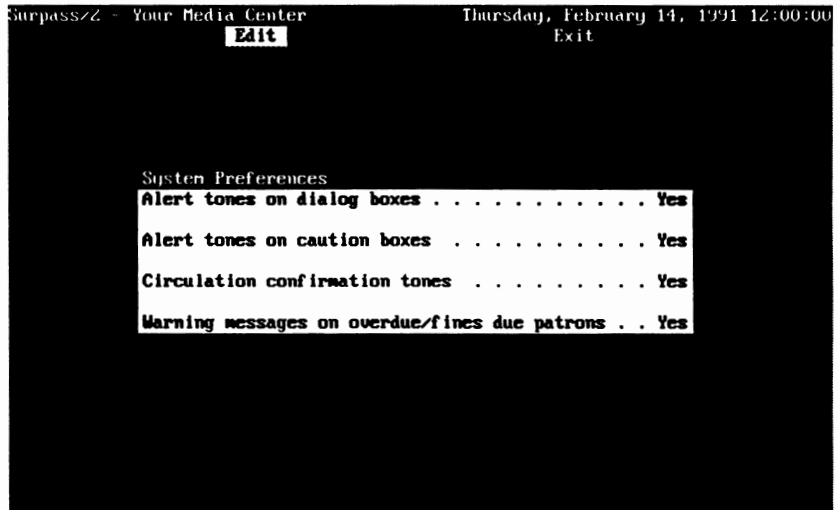
There are two items in the Define Patron Fields menu:

Edit.....Allows you to change the definition of the three user-definable patron fields.

Exit.....Returns to the System Setup menu.

System Preferences

The System Preferences feature of the System Setup menu allows you to change certain aspects of the operation of *Surpass/2* to suit your personal preferences.



System Preferences window

System Preferences Fields

When you select System Preferences from the System Setup menu, you will see a screen with the four aspects you can change:

Alert tones on dialog boxes

Allows you to specify whether you want the computer to make a three-note alert sound when it displays certain dialog boxes.

These tones are used to alert you to certain conditions (such as when a record is not found) and bring your attention to the screen. Not all dialog

boxes produce alert tones. If you prefer a quieter atmosphere, you can disable the dialog box alert tones by setting this to "No."

Alert tones on caution boxes

Allows you to specify whether you want the computer to make a four-note alert sound when it displays caution boxes.

Caution boxes appear when you are about to perform an irreversible major operation such as purging files and ending the year. You can silence the by caution boxes by setting this to "No."

Circulation confirmation tones

Tells *Surpass/2* whether to sound a soft tone when a check-out, check-in, renewal or fines transaction is completed.

When this is set to "No," the transaction will be completed and displayed in the "Last Five Transactions" section of the Circulation Transaction window but no confirmation "beep" will be made.

Warning messages on overdue/fines due patrons

Allows you to disable the messages that appear in the Circulation Transaction screen when a patron has overdue items, when a patron owes fines, when a patron is over his or her check out limit, when you attempt to check out an item that is reserved for another patron and when you attempt to renew an item that cannot be renewed or has been renewed the maximum number of times. You can disable these messages by setting this to "No."

Disabling the Circulation Transactions warning messages does not prevent the Circulation Transactions screen from telling the user that his or her security code does not allow him or her to complete the transaction. For example, if a Level 4 user is attempting to renew an item that can only be renewed by Level 5 or higher users, he or she will

still get a message from the computer regardless of whether the warning messages had been disabled.

System Preferences Menu Functions

There are two items in the System Preferences Fields menu:

Edit.....Allows you to change the four system preference aspects. The fields will accept only `Y' (yes) or `N' (no).

Exit.....Returns to the System Setup menu.

Passwords

The Passwords feature of the Maintenance menu allows you to set up and maintain a sophisticated security system for your *Surpass/2* files.

Surpass/2 allows you to have up to eight levels of security clearance numbered 1 to 8. The highest, Level 8, has access to every feature of the *Surpass/2* system. The lower levels may be defined by you to have varying degrees of access to the system.

Each of the eight security levels has a unique password which may be entered and changed by the Level 8 user. The security system is enabled when you first assign a password to Level 8. The next time you start *Surpass/2*, you will be asked to enter a password. Your level of access is determined by the password you enter.

When you select Passwords from the Maintenance menu, a menu appears with the following available features:

Change Level..... Allows you to change your current security clearance level.

Change Passwords
Allows you to change any of the eight passwords.

Menu Access..... Allows you to define which security clearance levels have access to which *Surpass/2* menus and features.

Circulation Access
Allows you to specify which security levels are allowed to override circulation "blocks" and due dates

Other Software..... Allows you to set security clearance levels for other software in the *Surpass/2* family.

Change Level

The Change Level feature of the Passwords menu allows you to change from your current level of access to a different level.

This feature allows you to change to a lower or higher security clearance level without having to exit and re-start *Surpass/2*. It is most useful if you want to turn the computer over to a user who has a lower security clearance.

When you select Change Level, *Surpass/2* displays the same "key box" you normally see when you start *Surpass/2* and asks you to enter a security code. The security code you enter determines the new security clearance level.

For example, if you started *Surpass/2* with a Level 8 password and want to turn the computer over to a Level 2 user, you would enter the Level 2 user's password.

The characters you type when you enter a password to not appear on the screen. Instead, they appear as small squares. This keeps the password invisible to prying eyes.

Change Passwords

The Change Passwords feature of the Password menu allows you to change the password for any of the eight security clearance levels.

When you select Change Passwords, you are asked to enter the security level for which you want to change the password. Enter a number from 1 to 8 or press the ESC key to return to the Passwords menu.

After you enter the security level number, a "key box" appears to ask you to type the new password. Type the new password and press ENTER.

The characters you type when you enter a password to not appear on the screen. Instead, they appear as small squares.

You will be asked to enter the same password a second time. Type the new password again exactly as you did before. *Surpass/2* will not change the password if the two codes you enter do not match. This extra step helps prevent unnoticed typing mistakes that would likely lock you out of this security level permanently. (If you typed something different from what you thought you typed, you would not know the actual security code).

Chose you security codes carefully and change them often. It's a good idea to write down the passwords and keep them in a safe place (away from computer and any unauthorized personnel).

Important

Don't forget your Level 8 security code. Without this code, you will not be able to access vital areas of the *Surpass/2* system. If you forget your Level 8 security code, call Customer Support. They can send you a disk with a new password.

Menu Access

The Menu Access feature of the Passwords Menu allows you to tell *Surpass/2* which users have access to each of the *Surpass/2* menu items.

When you select Menu Access, you will see each menu item of the entire *Surpass/2* system. The menu items are organized in an outline form. For example, each menu item of the Inventory Menu is indented below "Inventory." "Enter/Edit Items" is indented once (three spaces) below "Inventory;" the Add feature of Enter/Edit Items is indented below "Enter/Edit Items."

```

Surpass/2 - Your Media Center          Thursday, February 14, 1991 12:00:00
  Inventory      Patrons      Circulation      Maintenance      Exit

Menu Outline      Minimum Security Level      atus
Inventory . . . . .      2      up
  Enter/Edit Items . . . . .      2
    Add . . . . .      6      enance
      Title . . . . .      6
      Copy . . . . .      6
    Find . . . . .      2      Table
    Edit . . . . .      6
    Delete . . . . .      8
    List . . . . .      2
  View . . . . .      2
    Full MARC . . . . .      2
    Abbreviated MARC . . . . .      2
    Simple MARC . . . . .      2
    Next Page . . . . .      2
    Prev Page . . . . .      2
  Next . . . . .      2
  Previous . . . . .      2
  Exit . . . . .      0
  
```

Inventory, Enter/Edit Items, View
 Select a menu item and press Enter to edit. Press Esc when done...

System Security / Menu Access window

The number to the right of each item is the minimum level required to access this feature. For example, a six next to "Inventory" would mean that only users with a security level of 6 or higher would be allowed to access the Inventory Menu.

Use the up and down arrow keys and the PGUP and PGDN keys to move the highlight to the particular feature you want to change. The outline will scroll up and down on the screen. To help you see where you are, the "menu path" is shown on the second line from the bottom of the screen. For instance, if the highlight is on the Add feature of the Enter/Edit Items feature of the Inventory Menu, this line will show "Inventory, Enter/Edit Items, Add."

Press enter to change the minimum security level of the currently highlighted menu item. A window will appear asking you for the new minimum security level. Items with a security level of zero cannot be changed because they must be available to all users for the system to operate properly. Each user must be allowed to exit and to change their security level, for example.

When you are finished making changes to the minimum security levels, press the ESC key to return to the Passwords Menu. Your changes will be saved and will be effective immediately.

Designing a Custom Security System

Setting up a custom security system requires quite a bit of planning but the results are often worth the effort.

Start by making a list of each type of person who will be using the system and what each must and must not be able to do. Then, group these people into eight or fewer user groups and assign each group a number from one to eight (one having the least amount of access and eight having the most). Reserve Level 8 for yourself and perhaps a few other key people. Now it's simply a matter of using the Menu Access feature to assign the minimum levels to each menu item.

Important

Make sure that if you give one security level access to a menu that a person with that security level has access to at least one of the features in the menu. For example, if you give Level 5 users access to the Patron

Menu, make sure that there is at least one item in the Patron Menu that can be accessed by Level 5 users.

Also look for the opposite: If you give Level 4 users access to Enter/Edit Patrons, make sure they have access to the Patron Menu as well. Otherwise, they will not be able to get to Enter/Edit Patrons!

One more thing to watch for: Make sure that only the highest security level (Level 8) has access to the Change Passwords, Menu Access and Circulation Access features. If not, it's like giving everyone a master key to your *Surpass/2* system! A user who doesn't have access to one feature could just go to Menu Access and give herself access to it. Or she could just change the Level 8 password to one of her choosing.

Circulation Access

This Circulation Access feature allows you select the minimum security levels required for certain features of the Circulation Transactions screen.

```
Surpass/2 - Your Media Center          Thursday, February 14, 1991 12:00:00
      Edit                               Exit

Circulation Access Security Levels
Circulation Function      Minimum Security Level
Collect fines at time of check-in . . . . . 5
Override maximum items on loan . . . . . 5
Override renewal limit . . . . . 5
Check out or renew to overdue patrons . . . . 5
Check out or renew to patrons owing fines . . 5
Check out or renew items that are reserved . . 5
```

System Security / Circulation Access window

Circulation Access Fields

The circulation features for which you can set minimum security levels are:

Collect fines at the time of check-in

Defines the minimum security clearance level required to collect fines on overdue items when they are checked in.

If a user has a lower security level, he or she will not be allowed to collect fines.

Override maximum items on loan

Defines the minimum security level required to check out to patrons who are at or beyond their allowed maximum number of on-loan items (this is determined by the Maximum Items On Loan feature in the System Setup Menu).

If a user has a lower security level, he or she will not be allowed to check out or renew items to a patron who has reached the limit. If a user's security level is high enough, he or she will be warned that the patron has reached the maximum and will then be asked whether or not he or she wants to continue with the transaction.

Override renewal limit

Defines the minimum security level required to renew items which would not normally be renewable because they have reached the renewal limit for a single patron (as determined by the Circulation Categories feature of the System Setup Menu).

If a person has a lower security level, he or she will not be allowed to renew these items. If the security level is high enough, the user will be warned and asked whether the transaction should continue.

Check out or renew to overdue patrons

Defines the minimum security level required to check out items to or renew items for patrons who have overdue items.

Check out or renew to patrons owing fines

Defines the minimum security level required to

check out items to or renew items for patrons who have an outstanding fines balance.

Check out or renew items that are reserved

Defines the minimum security level required to check out or renew items that have a reservation pending for another patron.

If a user has a lower security level, he or she will not be allowed to check out these items unless the item is being checked out to the patron for whom it was reserved (provided that patron is at the top of the reservation list for the item).

Circulation Access Menu Functions

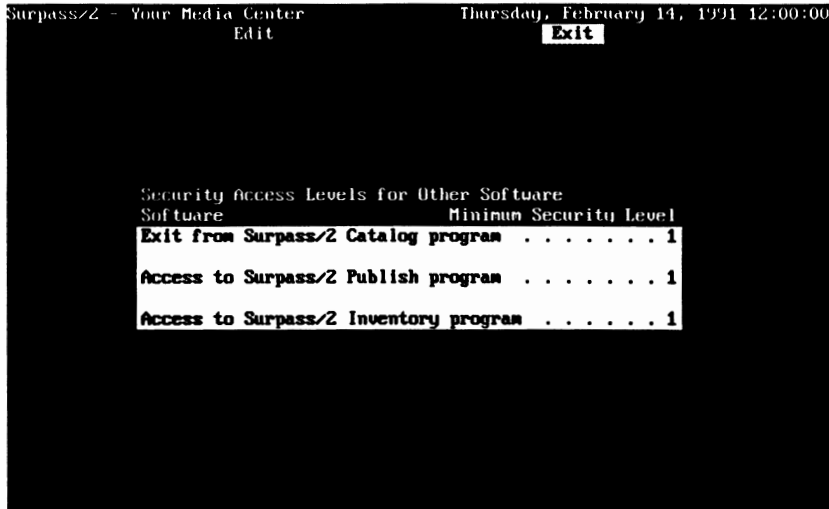
There are only two functions in the Circulation Access menu: Edit and Exit.

Edit Allows you to change the minimum security levels required to access features of Circulation Transactions. The fields will accept only the numbers 1 through 8.

Exit Returns to the Passwords menu.

Other Software

The Other Software feature of the Passwords menu allows you to say how you would like system security handled for other software in the *Surpass/2* family (such as *Surpass/2 Catalog*, *Publish* and *Inventory*).



Passwords / Other Software window

Other Software Fields

The following fields allow you to specify the minimum security level for different software products in the *Surpass/2* family. To specify that no security level is required, enter a zero in the field(s):

Exit from *Surpass/2* Catalog program

Allows you to specify the minimum security level (if any) needed for users to exit from the *Surpass/2* *Catalog* software to MS-DOS or PC-DOS.

This feature will have no effect if your system doesn't include *Surpass/2* *Catalog*.

Access to *Surpass/2* Publish program

Allows you to specify the minimum security level (if any) needed for users to access the *Surpass/2* *Publish* software (the program that allows you to publish and edit reviews written with the *Catalog/2* software and to write and publish library bulletins).

This feature will have no effect if your system doesn't include *Surpass/2* *Catalog*.

Access to *Surpass/2* Inventory program

Allows you to specify the minimum security level

(if any) needed for users to access the *Surpass/2 Inventory* software (the program that allows you to use Videx TimeWand I or II portable barcode readers for physical inventory checks).

This feature will have no effect if your system doesn't include the *Surpass/2 Inventory* software.

Other Software Menu Functions

There are only two functions in the Other Software menu: Edit and Exit.

Edit Allows you to change the minimum security levels required to access the other software products. The fields will accept only the numbers 0 through 8.

Exit Returns to the Passwords menu.

File Maintenance

The File Maintenance feature of the Maintenance menu allows you to build sorted indexes of files and to permanently remove (pack) deleted records from files.

When you add patron, MARC and other records to *Surpass/2*, the software automatically updates one or more indexes for each file. These indexes enable the software to quickly locate items.

What Are Indexes

A phone book is an example of an indexed (sorted) list that we often use. Fortunately, the names, addresses and phone numbers in your phone book are sorted (indexed) by name. Therefore, finding the telephone number or address of a person is quick and easy. But, try to find a person's name and address if all you know is the phone number. It would take a long time--even for a computer. It would be much easier if you had a separate, sorted list of phone numbers and would tell you where to look in the phone book to find the name and address. This is exactly what the file indexes in *Surpass/2* do.

The file that contains patron information, for example, has several separate, sorted lists called indexes. There is an index sorted by patron number and one sorted by name. These indexes enable the computer to quickly locate patron records.

When to Build Indexes

Each time you add or change a record, the appropriate indexes are automatically updated by *Surpass/2*. Under normal conditions, the indexes are always kept in order without any special help from you. However, these index files can be corrupted or damaged. This is usually caused by power failures that occur while *Surpass/2* or *Surpass/2 Catalog* is running. Turning your computer or file server off or pressing the reset button or CTRL-ALT-DELETE (reset) keys can have the same effect.

Symptoms of Damaged Indexes

The following are symptoms of damaged index files. If you should notice any of these symptoms, use File Maintenance to re-build the indexes for all files:

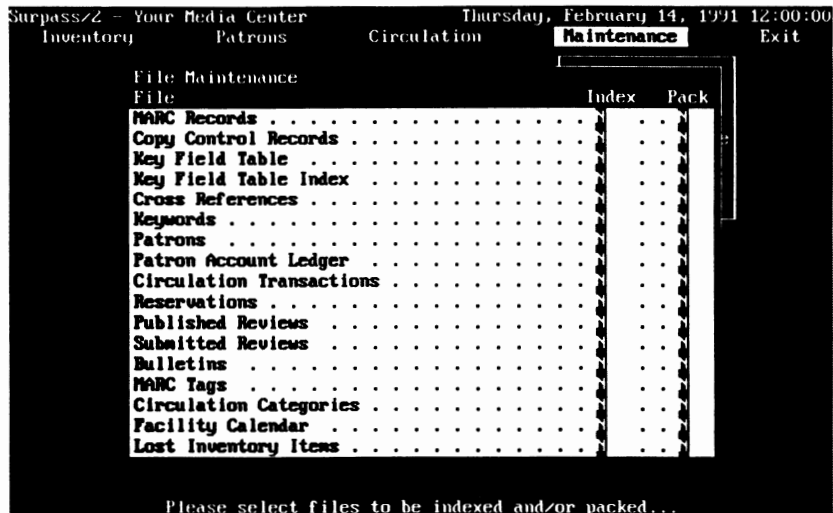
- *Surpass/2* cannot locate an item, patron or circulation transaction even though you are sure it is in the computer.
- A report printed by *Surpass/2* does not print a complete list based on the range you selected.
- A message similar to "Internal Error 19," "Index Corrupt," or "Internal Error 0" appears at the top of the screen.
- You experienced a power failure or system "lockup" at one or more of your workstations or at your network file server. This includes any condition in which you are or were unable to properly exit the *Surpass/2* or *Surpass/2 Catalog* software.

Packing

When a record is deleted, it is not actually removed from the file. Instead the information contained in the record is cleared. Later, when a new record is added, *Surpass/2* will use these "deleted" records to contain the new information. If there are no "deleted" records available, it will add a new record to the file, increasing the size of the file and decreasing the amount of disk space available.

Packing permanently removes any "deleted" records. This makes the size of the file smaller and increases the amount of disk space available. As a side effect, it can make the system run a bit faster (*Surpass/2* doesn't have to skip over so many "deleted" records).

Because the space used by deleted records is automatically re-used when you add new records, packing files is not normally necessary. If, however, you delete a large number of records (MARC records, patrons, etc.) and will not be replacing most of those with new records, you might want to consider packing the file to increase the amount of free space on your hard disk.



File Maintenance window

When you select File Maintenance from the Maintenance menu, a window appears listing the names of the *Surpass/2* files. Two columns, "Index" and "Pack" allow you to select whether you want to pack and/or index the files.

Type a `Y' (yes) in the Index column next to each file you want to index. Type a `Y' in the Pack column for each file you want to pack. If you select to pack a file, the file will automatically be indexed. Put an `N' in the Pack and/or Index columns for those files you do not want to Pack or Index.

After you have answered yes or no for each of the files Pack and Index columns, you will be asked if you are ready to begin. Answer "yes" to begin or "no" to change your selections. Press ESC if you want to return to the Maintenance menu.

Packing and indexing can take several minutes or several hours depending on the sizes of the files and the speed of your computer. Once the process has started, it cannot be interrupted and should be allowed to complete.

If a power failure occurs during indexing, you should re-start the indexing process before continuing to use the system.

If a power failure occurs during packing, you might lose some records in the file that was being packed. You should re-start the indexing process

and, when it is complete, check the file for missing records. If there are records missing, you might have to use your backup disks or tapes.

Important Note For Network Users

You cannot index or pack files when they are in use by other users. Therefore, you should make sure that all workstations connected to your network are either shut down or are not running *Surpass/2* or *Surpass/2 Catalog*.

Files And What They Contain

The following is a list of the *Surpass/2* files listed in the File Maintenance window:

- MARC** Contains the bibliographic information for each item in your collection.

- Copy Control**..... Contains the unique information for each copy of each title. This includes barcode number, location, circulation status and acquisition information.

- Key Field Table**..... Contains a list of every field in every MARC record which is searchable. This table allows *Surpass/2* to locate MARC records based on title (245), author (100), call number (900), etc. MARC fields are made searchable or not searchable using the MARC Tags feature of the System Setup menu.

- Key Field Index**..... Contains information used by the Key Field Table to help *Surpass/2* locate individual MARC records.

- Cross References**..... Contains the subject and author "see" and "see also" cross references used by *Surpass/2 Catalog*.

- Keywords** Contains a list of every searchable keyword in every MARC record. This file is created and updated by the Keywords feature of the Maintenance menu.

- Patrons** Contains patron names, addresses, locations, etc.

- Account Ledger** Contains the detailed list of each ledger transaction (fines, charges and payments).
- Transactions**..... Contains the detailed list of each circulation transaction. A new transaction record is created each time an item is checked out.
- Reservations**..... Contains the detailed list of each reservation. Each time an item is reserved, a reservations record is created.
- Published Reviews** .. Contains the book reviews used by *Surpass/2 Catalog*.
- Submitted Reviews** Contains books reviews which were entered by patrons using *Surpass/2 Catalog* but which have not yet been "published" for other patrons to see. When a review is published, it is moved from this file to the published reviews file.
- Bulletins** Contains the library notices which are displayed by *Surpass/2 Catalog*.
- MARC Tags** Contains the definitions of all MARC fields. MARC fields are defined using the MARC Tags feature of the System Setup menu.
- Categories** Contains the definitions of all circulation categories. Circulation categories are defined using the Circulation Categories feature of the System Setup menu.
- Facility Calendar** Contains the holidays and closed dates as defined in the Facility Calendar feature of the System Setup menu.
- Lost Items** Contains the list of items which have been declared as lost. Items are added to this list using the Lost & Found feature of the Inventory menu.

Keywords

The Keywords feature of the Maintenance menu allows you to build a list of keywords to be used by *Surpass/2 Catalog* when doing keyword searches.

Surpass/2 will build a list of containing every word in each MARC field which has been defined to contain keywords. (See "MARC Tags" starting on Page 195.) This list of words is searched when you use *Surpass/2 Catalog* to do a keyword search. Keywords are not automatically added when you add new MARC records or make changes to existing MARC records. The Keywords feature must be used to include these items in the list of key words.

Surpass/2 - Your Media Center Thursday, February 14, 1991 12:00:00

Inventory Patrons Circulation Maintenance Exit

Current Status

Create Keyword List

Min. word length: 3 Include numbers: Yes Convert all numbers to arabic? Yes

Words to Exclude from Keyword List

								ABOUT
								ALL
								AND
								CAN
								FOR
								NOT
								OFF
								THAT
								THE
								WHEN
								WHICH
								WITH

are you ready to begin? YES NO

Keywords window

When you select Keywords from the Maintenance menu, a window appears to allow you to say how the keyword list will be built.

Keywords Fields

The top three fields, Min. Word Length, Include Numbers, and Convert All Numbers to Arabic enable you to define what types of keywords will be used:

Word Length..... Enter a number telling *Surpass/2* the minimum length of words to use as keywords.

For example, enter "3" in this field if you want *Surpass/2* to ignore any words which are shorter than three letters. Words shorter than three letters, such as "A," "Of," and "To" are not often used for keyword searching because they are not generally descriptive of the subject matter of the book. Additionally, these very short words are used often and in many titles, notes and annotations; therefore, they including them in your keyword list can waste a lot of precious hard disk space.

Include Numbers ... Enter a `Y' (yes) in this field if you want *Surpass/2* to consider numbers to be keywords and you want to be able to use numbers when doing keyword searches.

Convert to Arabic... Enter a `Y' (yes) in this field if you want *Surpass/2* to convert Roman (such as "IV" and "MCMLXXX") and English (such as "Four" and "Sixty-Three") to Arabic (4, 1980, 4 and 1969) when they are added to the keyword list.

When a patron enters a Roman or English keyword in *Catalog/2*, the number is converted to Arabic for the search. This makes it much easier to find numeric keywords.

Words to Exclude

The bottom section of the Keywords window allows you to specify individual words which you do not want to be considered to be keywords. *Surpass/2* will ignore these words when it builds the keyword list.

Words which are used often but are not descriptive (such as prepositions, conjunctions and articles) make bad keywords and usually just waste hard disk space. *Surpass/2* comes with a list of suggested words to exclude. You can add to or change this list to suit your own preferences.

After you have answered the questions at the top of the Keywords window and made any changes to the list of words to exclude, you will be asked if

you are ready to begin. Answer "yes" if you are ready to start building the keyword table, "no" if you want to make additional changes in the window, or press the ESC key if you want to return to the Maintenance menu.

The keyword table can take from several minutes to several hours depending on the size of your collection, the number and length of the MARC fields used for keywords and the speed of your computer. A bar graph is displayed at the bottom of the screen to show you how the building of the keyword table is proceeding.

After the keyword table is built, it the words are sorted (indexed). The bar graph does not show the progress of indexing.

Important Note For Network Users

You cannot build the keyword table when *Surpass/2 Catalog* is running on any workstations connected to your network. Therefore, you should make sure that all workstations connected to your network are either shut down or are not running *Surpass/2 Catalog*.

Purge Files

The Purge Files feature of the Maintenance menu allows you to purge circulation transactions, patron account ledger detail and/or calendar holidays when they are no longer needed.

When you select Purge Files from the Maintenance menu, the Purge Files menu appears with the following options:

Closed Transactions

Allows you to purge closed circulation transaction records.

Ledger Detail Allows you to purge the detailed ledger of patron fines, charges and payments.

Past Holidays Allows you to remove holidays that have passed from the facility calendar.

Closed Transactions

Select Closed Transactions from the Purge Files menu when you want to remove the detailed history of closed circulation transactions.

Certain circulation reports (such as the Circulation Analysis and the Circulation Summary) use information found in the transactions file. Therefore, you should purge only those transactions for which you have already printed any necessary circulation reports. Transactions that are not closed (books that have not been checked in) will never be purged regardless of their age.

When you select the Closed Transactions feature of the Purge Files menu, you will be asked to enter a date. All closed transactions which were begun on or before this date will be purged.

Before the purge begins, a caution box will appear to warn you of what is about to happen and ask you if you want to continue. Make sure the date is correct and type YES and press ENTER if you want to proceed.

The transactions that will be purged are those you see when you select Status:History from the Enter/Edit Patrons menu.

Ledger Detail

Select Ledger Detail from the Purge Files menu when you want to remove the detail (individual ledger transactions) of the patrons' account ledgers (where individual fines and charges are stored).

Purge Ledger Detail will not effect the actual fines and charges balances of patrons. The balance of all ledger transactions done on or before a certain date will be condensed into a single "beginning balance" transaction.

When you select the Ledger Detail feature of the Purge Files menu, you will be asked to enter a date. All the detailed information for all account ledger transactions which were entered on or before this date will be purged and will be replaced with a single "beginning balance" transaction.

Before the purge begins, a caution box will appear to warn you of what is about to happen and ask you if you want to continue. Make sure the date is correct and type YES and press ENTER if you want to proceed.

Past Holidays

Select Past Holidays from the Purge Files menu to remove old holidays from the Facility Calendar. This is also done as part of the End of Year procedure found in the Maintenance Menu.

Purging past holidays from the Facility Calendar will not effect due dates since they were already set when the items were checked out. It can, however, effect the amount of fines charged on overdue books that are turned in after purging the calendar because the calendar is checked for the holidays that occurred between the date the book was due and the date it is checked in (it will not give fines credits for the holidays).

When you select the Past Holidays feature of the Purge Files menu, you will be asked to enter a date. All Facility Calendar holidays that occurred on or before that date will be removed.

Before the purge begins, a caution box will appear to warn you of what is about to happen and ask you if you want to continue. Make sure the date is correct and type YES and press ENTER if you want to proceed.

Key Field Table

Surpass/2 maintains a "key field table" which contains the contents of each sortable field. This table is used when *Surpass/2* searches for MARC records and when it prints reports sorted by a particular MARC field.

MARC fields are made sortable by using the MARC Tags feature of the System Setup menu and answering "Yes" to the "Should records be sorted by this field?" question.

The key field table is automatically updated when you add, edit or import a MARC record. It is not updated, however, when you delete a record or when you use the MARC Tags feature to make a field sorted or non-sorted.

After deleting a record or changing the sort status of a field using the MARC Tags feature, you will need to use the Key Field Table feature of the Maintenance menu to re-build the sorted table of key fields.

This process is totally automatic, but it does require a substantial amount of the time to complete (from a few minutes to several hours depending on the size of your collection and the speed of your computer). Therefore, you should plan to run it at night or when you will not be needing access to *Surpass/2* records for an extended period of time.

To re-build the key field table, select the Key Field Table feature of the Maintenance menu. A cautionary message will appear to ask whether you want to proceed. You must type YES and press ENTER to continue. Otherwise, you will be returned to the Maintenance menu.

If you answer "Yes," *Surpass/2* will begin creating the Key Field Table. It will return to the Maintenance menu when it's finished.

In an emergency, you can stop the lengthy Key Field Table process by pressing the ESC key. If you do this, however, *Surpass/2* will not be able to accurately find any item or print any sorted report by anything other than the 901 (barcode number) field. Therefore, you should re-build the Key Field Table at the earliest possible opportunity.

Important Note For Network Users

You cannot build the key field table when *Surpass/2 Catalog* is running on any workstations connected to your network. Therefore, you should make sure that all workstations connected to your network are either shut down or are not running *Surpass/2 Catalog*.

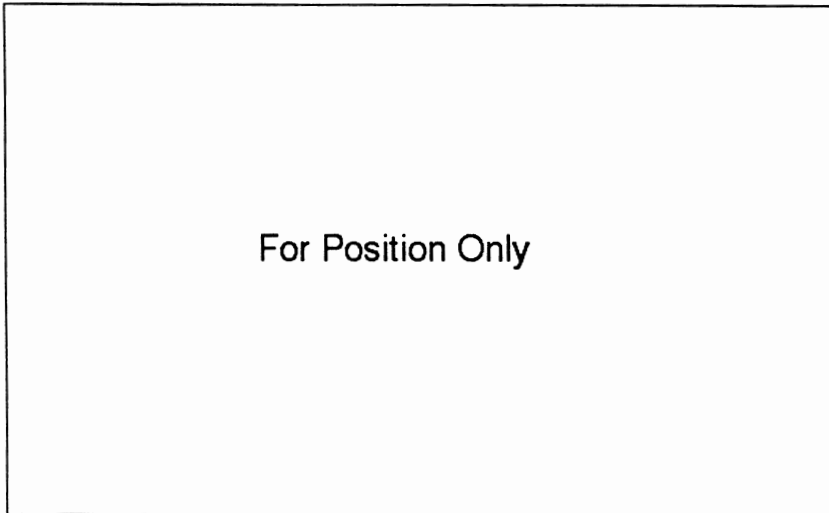
End of Year

Select the End of Year feature of the Maintenance menu when you are ready to close the school year.

The End of Year procedure does the following:

- Optionally resets the yearly circulation counts to zero. This is the count, maintained for each item, of the number of items the item was checked out.
- Optionally removes all past holidays from the Facility Calendar. Future holidays are not affected.
- Optionally advances the grade level of all student patrons.
- Optionally purges the records for graduating student patrons.

When you select the End of Year feature, a window appears to ask you for the End-of-Year options you want to select.



End-of-Year window

The following fields appear in the End of Year window:

Reset Circulation Counts

Put a `Y' (yes) in this field if you want to reset the yearly circulation counts to zero.

Purge Past Holidays

Put a `Y' (yes) in this field if you want to remove past holidays from the Facility Calendar.

Removing past holidays will not affect the due dates of books checked out in the future, but it will affect the fines charged on overdue books that were checked out prior to running the End of Year procedure. Since *Surpass/2* will not know about past holidays, it will charge fines for those days on overdue books.

Advance Patron Grades

Put a `Y' (yes) in this field if you want to advance the grade levels of student patrons.

This will not affect patrons of other types (staff, normal, etc.). Patrons who are in 7th grade will be automatically advanced to 8th grade, 8th to 9th, 9th to 10th, etc.

If you are not purging graduating 12th-grade students using the Purge Graduating Patrons and Graduating Grade fields and you select this option, their patron type will automatically be changed to "Other" because Grade 13 is not a valid patron type.

If you know of students who will not be advancing to the next higher grade level, you should lower their grade levels before closing the year. For example, if you have a 10th grader who will still be in 10th grade next year, you should change her grade level to Grade 9 before closing the year. After closing the year, she will be back in Grade 10.

Purge Graduating Patrons

Put a `Y' (yes) in this field if you want to automatically purge students who will be graduating.

If you answer "yes" to this field, you will need to specify the current grade level of the graduating class in the next field, Graduating Grade.

Graduating Grade .. The grade level of the graduating class.

Enter the grade level of the graduating class. For example, if your school's highest grade level is 12th grade, you would enter "12" in this field to automatically delete these patrons.

This field is mandatory if you answer "yes" to the Purge Graduating Patrons field. Otherwise, it is ignored and does not affect the End of Year process.

If you know of students in the graduating class who will not be graduating, you should lower their grade levels before closing the year. For example, if you have a 12th grader who will still be in 12th grade next year, you should change his grade level to Grade 11 before closing the year. After closing the year, he will be back in Grade 12 and will not have been purged.

After you have answered the questions in the End of Year window, a question will appear at the bottom of the screen to ask whether you are ready to continue. Answer "no" to this question if you want to go back and make changes to the End of Year window fields. Answer "yes" to continue.

When you answer "yes" to the "Are you ready to continue?" question, *Surpass/2* will display a caution box to tell you what is about to happen and to ask you whether you want to continue. To continue with the End of Year procedure, you must type the word, YES and press ENTER. Once it has begun, the End of Year process cannot be interrupted, so make sure you have selected the proper options and that you are indeed ready to close the year. If you answer in any other way, you will be safely returned to the Maintenance menu.

If you continue, *Surpass/2* will immediately begin the End of Year process. This usually takes from several minutes to an hour or more depending on the size of your collection, the number of patrons, the

options you selected and the speed of your computer. When it is finished, it will return you to the Maintenance menu.



Exit

Select Exit from the Main menu when you are ready to turn off your computer or you want to run another application (such as *Surpass/2 Catalog* or a word processor).

When you select Exit from the Main menu, the Exit menu appears allowing you to select "Yes" to leave *Surpass/2* or "No" to continue using *Surpass/2*.

Important

Never turn off your computer, press the reset button or press CTRL-ALT-DELETE (the reset key combination) before exiting *Surpass/2*. Turning off your computer while the *Surpass/2* program is running can cause you to lose recently entered information and can corrupt the index files (see "File Maintenance" starting on Page 221).



When The Unexpected Happens

When doing anything that you haven't done before, you're bound to run into the unexpected. And, when you start using something as complex and perplexing as a computer, the unexpected can often be bewildering and frustrating.

This section is here to help you when you encounter problems when using *Surpass/2*. It is divided into two sections, "Errors" and "Unexpected Results." The first section, "Errors," lists some of the error messages that might appear at the top of the screen. The second, "Unexpected Results," is here to help you when you don't get the results you expect from the computer.

Errors

Errors can happen when the *Surpass/2* software encounters something that it doesn't expect. For example, if the software can't find one of its database files, it will tell you so by displaying an error message.

Error messages are displayed on the very top line of the screen. If your computer seems "locked" or it is not responding to your requests, glance at the top line of the screen to see if there is an error message displayed there.

The following steps will help you to handle and recover from error messages:

1. Don't panic! The error message is just the computer's way of telling you that something is wrong and that it needs your help. There is always a solution.
2. Carefully write down *everything* that appears on the top line of the screen. This will help you determine how to correct the problem. If you can, press SHIFT-PRINTSCREEN to print the screen on your printer.
3. Some error messages ask whether you want to continue or retry by displaying a question in the upper-right corner of the screen. *Always* answer "no" to this question by pressing 'N' and ENTER. This will take you safely out of *Surpass/2* and back to MS-DOS or PC-DOS.
4. Compare the error message you received to the list of errors. This list helps explain the error by showing possible causes and gives you suggestions on how the error might be corrected. Try these suggestions.
5. If you cannot find the error in the list or if the suggestions don't solve the problem, call Customer Support for assistance (1-800-292-1891). Be prepared to tell the customer support representative the exact error message and to explain what you were trying to do when the error occurred. If possible, call from a phone next to your computer so you can try any suggestions offered by the support representative.

Error: Internal error 19
or
Index corrupt

Cause
One or more of your index files has been damaged by a brief power outage, accidental reset or equipment failure.

Solution
Re-build all file indexes by selecting the File Maintenance feature of the Maintenance menu. See "File Maintenance," Page 221, for more information.

Error: Proc *pppppppp* line 0, open error *nnnnnnnn.xxx*
(0)

Cause
One or more of your index files has been damaged by a brief power outage, accidental reset or equipment failure.

Solution
Re-build all file indexes by selecting the File Maintenance feature of the Maintenance menu. See "File Maintenance," Page 221, for more information.

Cause
One or more of data files has been damaged by a brief power outage, accidental reset or equipment failure.

Solution
You might need to restore your most-recent backup. Call Customer Support for advice and assistance.

Error: Proc *pppppppp* line 0, open error *nnnnnnnn.xxx*
(2)

Cause
Surpass/2 cannot find the file *nnnnnnnn.xxx* because you were not in the correct directory when you started *Surpass/2*.

Solution
Change to the directory where *Surpass/2* is stored (usually "\SURPASS" by typing the following command and see if that solves the problem:

CD \SURPASS ENTER

Cause

If the "xxx" portion of the filename is "NTX", one or more of index files has been accidentally deleted.

Solution

Re-build all file indexes by selecting the File Maintenance feature of the Maintenance menu. See "File Maintenance," Page 221, for more information.

Cause

One or more of data files has been deleted.

Solution

You might need to restore your most-recent backup. Call Customer Support for advice and assistance.

Error: Proc *pppppppp* line 0, open error *nnnnnnnn.xxx*
(4)

Cause

You do not have a line that reads

FILES=35

(or higher) in your CONFIG.SYS file.

Solution

Use the Config program to make sure that you have the proper "FILES=" line in your CONFIG.SYS file. If the line is not there or if the number is lower, change it and reset your computer. See "Configuring *Surpass/2* For Your Library," starting on Page 23, for more information on using the Config program.

Cause

You do not have a line that reads

SET CLIPPER=F35;E000

(or higher than 35) in your AUTOEXEC.BAT file.

Solution

Use the Config program to make sure that you have the proper "SET CLIPPER=" line in your AUTOEXEC.BAT file. If the line is not there or if the number is lower, change it and reset your computer. See "Configuring *Surpass/2* For Your Library," starting on Page 23, for more information on using the Config program.

Cause

You are not using MS-DOS or PC-DOS Version 3.30 or higher.

Solution

Contact your computer vendor about upgrading your version of MS-DOS or PC-DOS to Version 3.30. *Surpass/2* will not operate with earlier versions of DOS. To find out which version of DOS you are using, type the following command:

```
VER ENTER
```

Cause

If you are using a network, your network server might not be set up to handle as many open files as *Surpass/2* requires.

Solution

Contact your network supervisor or the person who installed your network to find out how to increase the number of open files (sometimes called "file handles").

Error: Proc *pppppppp* line 0, open error *nnnnnnnn.xxx*
(5)

Cause

Your network "login name" does not give you adequate "rights" to access the *Surpass/2* programs and files.

Solution

Contact your network supervisor or the person who installed your network and ask him or her to tell you how to grant all rights to all users.

If you have a Novell network and feel you can handle this yourself, do the following:

1. Login as supervisor:
LOGIN SUPERVISOR
2. Change to the *Surpass* directory:
CD \SURPASS
3. Grant all rights to everyone:
GRANT ALL TO EVERYONE

Cause

The *Surpass/2* programs and files on your network are not "flagged" so that they can be used by more than one person at a time.

Solution

Contact your network supervisor or the person who installed your network and ask him or her to flag the files to be shareable.

If you have a Novell network and feel you can handle this yourself, do the following:

1. Login as supervisor:
LOGIN SUPERVISOR
2. Change to the Surpass directory:
CD \SURPASS
3. Change the file flags:
FLAG *.* /SRW
FLAG *.EXE /SRO

Unexpected Results

You might find that sometimes *Surpass/2* doesn't behave exactly as you think it should. Like a rebellious child, you tell it one thing and it does something totally different or you just can't make it understand what you want. More often than not, this is just a simple case of miscommunication. This section contains some common problems that you might encounter, their causes and their solutions.

Problem: You try to print a report, label or catalog card sorted by call number and some items are missing from the report or the report doesn't print.

Cause

The books that didn't print could be missing call numbers. When a reports, labels or cards are sorted by a certain field, MARC records that do not have anything in that field will not be printed.

Solution

Make sure that every record has a call number (or something in the sort field) or sort the report by another field (such as barcode number or title).

Cause

Your key field table could have been damaged by a brief power outage, accidental reset or equipment failure.

Solution

Re-build the key field table by selecting the Key Field Table feature of the Maintenance menu. See "Key Field Table," Page 232, for more information.

Editor's note:

This section is incomplete as of this printing. It will be included in the final draft.



Sample Reports

Editor's note:

This section is incomplete as of this printing. It will be included in the final draft.



Index

Editor's note:

This section is incomplete as of this printing. It will be included in the final draft.

