

1

Setup

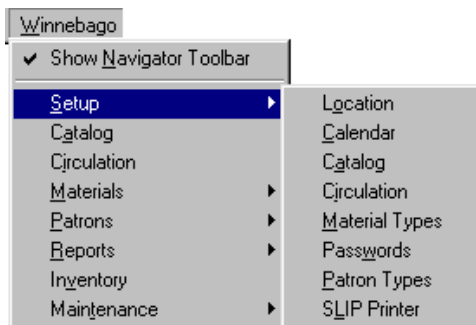
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Setting up the program

By setting up your Spectrum CIRC/CAT program, you're customizing certain features of the program to comply with your library's needs. For this purpose, your program has several setup categories. These setup categories don't need to be done in a specific order; however, you need to complete program setup before you add materials or patrons and perform circulation activities.

About password-protected features

When you try to access the various setups in Spectrum CIRC/CAT, you may be prompted to enter a password. If you just installed the Spectrum CIRC/CAT program, you are prompted to enter the master password. The default master password is CIRC (in all capital letters). We advise that you change the master password to a word more unique to the person(s) using the master password. See "Setting up passwords" at the end of this chapter for more information about passwords.



Winnebago > Setup menu

The Setup menu lets you access the parts of the program that require setup information.

For information on the different setup program elements, see "Understanding the setup program elements" in the *Setup* chapter of the *Spectrum CIRC/CAT Reference Manual*.

Setting up your location

Before you use your Spectrum CIRC/CAT program, you need to set up your location information. In this setup, you enter your library's name and address as well as other options to get the program up and running according to your needs.

To access Location Setup

Choose **Setup > Location** from the **Winnebago** menu. The Location Setup window opens, which contains a **General** and a **Numbers** tab.

For information on the program elements in Location Setup, see "Location Setup program elements" in the *Setup* chapter of the *Spectrum CIRC/CAT Reference Manual*.

Setting general location information

The General tab of Location Setup prompts for general details about your local library, such as your library's location code, name, address, postal code, fax number, and material user-defined fields.

Although it's not required that you set up all the information in the General tab, we recommend that you enter it here so you can reference it. Plus, some of the information prints on reports, and the items that you enter in the user-defined fields are used as additional entry fields in the Holdings window of Material Edit.

About location codes

The location code is a specific code for your library. The location code can be one to four characters long; however, Sagebrush recommends that you use four character location codes. Valid characters for the location code are all uppercase letters (A-Z) and all numerical characters (0-9). Spaces are not valid characters.

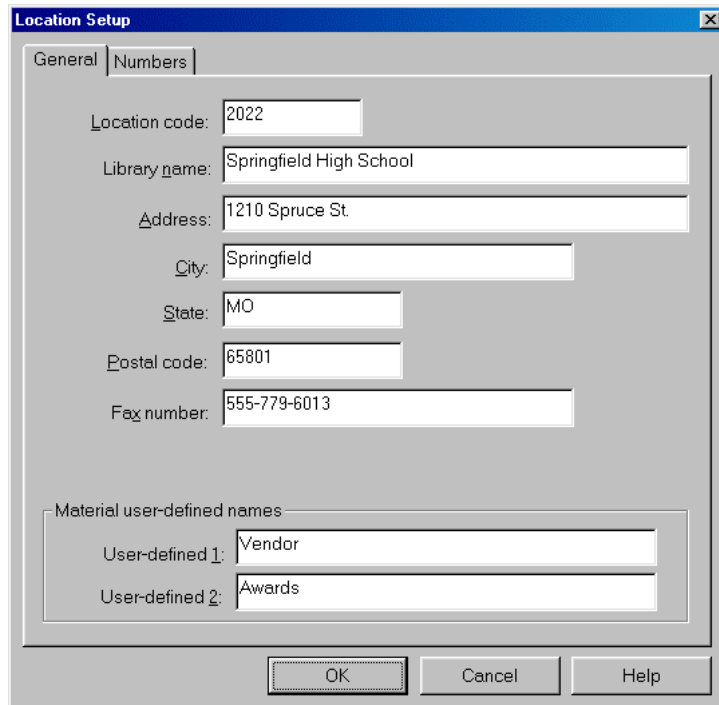
If your library participates in a cooperative library system (such as Winnebago Union CAT or Spectrum Union Catalog) you may need the location code to identify materials from your library. Also, if you print 14-digit barcodes in your Spectrum CIRC/CAT program, your location code must be four characters long.

How to set general location information

Example scenario: You're the librarian for Springfield High School, and you want to enter your general location information. You also want to set up two user-defined fields, one for the different vendors the library receives books from and one to specify the name of a book set if a book belongs to one.

To set general location options

- 1 Choose **Setup > Location** from the **Winnebago** menu. The Location Setup window opens with the **General** tab active.



The screenshot shows a dialog box titled "Location Setup" with two tabs: "General" and "Numbers". The "General" tab is active. The dialog contains several text input fields:

- Location code: 2022
- Library name: Springfield High School
- Address: 1210 Spruce St.
- City: Springfield
- State: MO
- Postal code: 65801
- Fax number: 555-779-6013

Below these fields is a section titled "Material user-defined names" containing two more input fields:

- User-defined 1: Vendor
- User-defined 2: Awards

At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".

- 2 In the **Location code** box, type *2022*.
- 3 In the **Library name** box, type *Springfield High School*.
- 4 In the **Address** box, type *1210 Spruce St.*
- 5 In the **City** box, type *Springfield*.
- 6 Type *MO* in the **State** box.
- 7 Type *65801* in the **Postal code** box.

- 8 Type *555-779-6013* in the **Fax number** box.
- 9 In the **User-defined 1** box, type *Vendor*.
- 10 In the **User-defined 2** box, type *Book set*.
- 11 Click **OK** to save the settings or click the **Numbers** tab to set your location's number options.

Setting your location's number options

You determine whether to remove leading zeros from material and patron numbers, as well as exclude 9-digit patron numbers in the Numbers tab of Location Setup. You may want to exclude 9-digit patron numbers if you use social security numbers for your patron numbers. This is also where you can set up partitions between materials and patrons.

Note: If your library uses 14-digit barcodes, you must select the option to remove leading zeros from your material and patron numbers.

What is a partition?

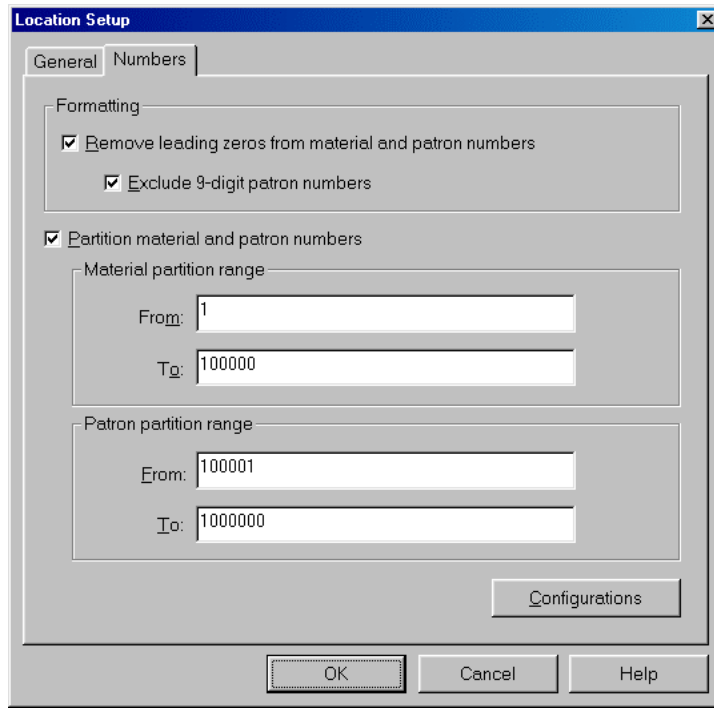
When you set up partitions, a material number cannot be added in a range that is set up for patron numbers and vice versa. If partitions are not set up, a number can be used for both a material and a patron. If you don't set up a partition, we recommend placing the letter "P" (for patron) before each of your patron barcodes to differentiate patron barcodes from material barcodes. The setups in the Numbers tab are optional.

How to set your location's number options

Example scenario: You want to remove leading zeros from your barcodes, exclude 9-digit patron numbers, and set up a partition for your material and patron numbers.

To set your numbers options

- 1 Choose **Setup > Location** from the **Winnebago** menu. The Location Setup window opens.
- 2 Click the **Numbers** tab.



- 3 Select the **Remove leading zeros from material and patron numbers** option.
- 4 Select the **Exclude 9-digit patron numbers** option.
- 5 Select the **Partition material and patron numbers** option.
- 6 In the **From** box for the material partition range, type *10,001*.
- 7 In the **To** box for the material partition range, type *100,000,000*.
- 8 In the **From** box for the patron partition range, type *1*.
- 9 In the **To** box for the patron partition range, type *10,000*.
- 10 Click **OK** to save the setting and exit.

Configuring your location's barcodes

The Configurations window in Location Setup lets you set up the format of your material and patron numbers. You tell the program how many digits you want in your material and

patron numbers and whether you want type indicators, location indicators, item number indicators, or fill character indicators when you add or edit the configurations. You also determine what numbers to use for patron and material indicators.

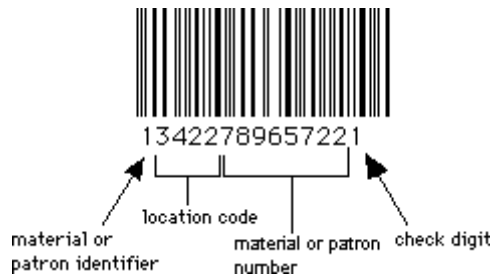
By default, the Configurations window has four different length barcode configurations: 10-, 11-, 13- and 14-digits. These configurations work with all standard barcode configurations. The only time you would need to add or edit existing barcode configurations is if the barcodes used have unusual configurations (meaning they don't fall within the four configurations listed above). Very rarely do you need to add or edit existing barcode configurations.

Understanding number configurations

If you have a 14-digit material barcode number such as 3555589788427K, the first number (3) is a type indicator and shows that it is a material (the number three is the material type indicator—represented by the letter "I"—in the default 14-digit barcode configuration). The next four numbers (5555) are the location code (represented by the letter "L" in a barcode configuration). The following eight numbers (89788427) are the actual barcode number that is assigned to the material (represented by the letter "B" in a barcode configuration), and the last character (K) is a fill character (represented by the letter "F" in a barcode configuration). The program automatically assigns a fill character when you print labels. A fill character is an ignored character and is generally placed as the last digit of a configuration. For example, you might have a material barcode number that is only 13 digits long. In order for that barcode to be compatible with 14-digit barcodes, the program assign a fill character so it can be read as 14 digits.

The configuration format the using the example above would be: "ILLLLBBBBBBBBBF".

Example of a 14-digit barcode

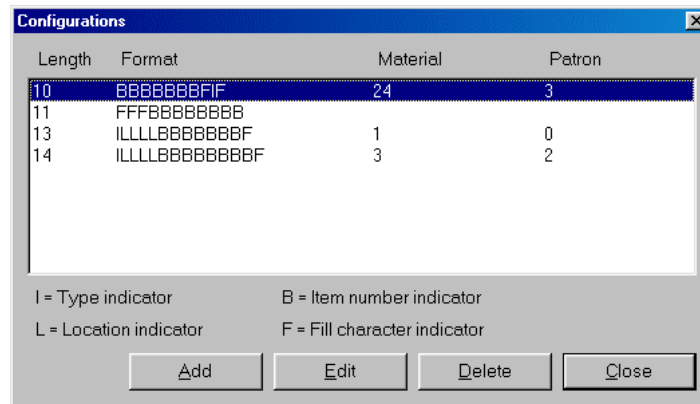


How to add and edit a barcode configuration

Example scenario: You would like to add a new configuration to comply with the barcodes found on the books you received from a new vendor. The new barcodes are 12-digits. The first four digits are the location code (L) and the last eight are the barcode itself or the item number indicators (B).

To add a new configuration

- 1 Choose **Setup > Location** from the **Winnebago** menu. The Location Setup window opens.
- 2 Click the **Numbers** tab.
- 3 Click the **Configurations** button. The Configurations window opens.



- 4 Click **Add** in the **Configurations** window. The New Configuration window opens.
- 5 Enter **LLLLBBBBBBB** in the **Format** box. *Note:* The Format box only accepts the letters I, L, B, and F—and they must be capitalized.
- 6 Don't enter anything in the **Patron indicator(s)** or **Material indicator(s)** box.
- 7 Click **Save**. The new configuration is displaying the Configurations window.

Example scenario: You have 14-digit barcodes that have a space as the last character (which may happen in a standard code 3 of 9, mode 43 symbology). In order to compensate for this extra space, you need to edit the 13-digit barcode configuration.

To edit a configuration

- 1 Choose **Setup > Location** from the **Winnebago** menu. The Location Setup window opens.
- 2 Click the **Numbers** tab.
- 3 Click the **Configurations** button. The Configurations window opens.
- 4 Select the *13-digit configuration* from the list of barcode configurations.
- 5 Click **Edit** in the Configurations window. The Edit Configuration window opens.
- 6 In the **Format** box, change the ending *F* in the configuration to a *B*. This changes the placement of the fill character to an item number indicator (represented by the letter "B").
- 7 In the **Patron indicator(s)** box, change the *0* to a *2*. This means that there will always be a number "2" in the "I" (or type indicator) position of a 13-digit patron barcode.
- 8 In the **Material indicator(s)** box, change the *1* to a *3*. This means that there will always be a number "3" in the "I" (or type indicator) position of a 13-digit material barcode.
- 9 Click **Save**.



To cancel the new configuration or not save changes, click **Cancel** in the New/Edit Configuration window. If you choose **Cancel**, the information is not saved.

How to delete a barcode configuration

Example scenario: You know you don't need 12-digit barcode configurations in your library longer, so you want to delete this configuration.

To delete a configuration

- 1 Choose **Setup > Location** from the **Winnebago** menu. The Location Setup window opens.
- 2 Click the **Numbers** tab.
- 3 Click the **Configurations** button. The Configurations window opens.
- 4 Select the **12-digit configuration** from the list of barcode configurations.

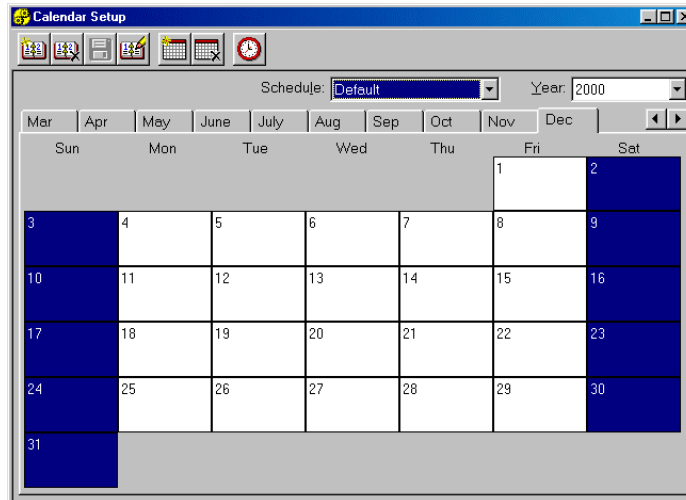
- 5 Click **Delete** in the **Configurations** window. A confirmation window opens asking if you want to delete the configuration.
- 6 Click **Yes**.
- 7 Click **Close** to exit the Configurations window.

Setting up the calendar

Your library's open days and hours are set up in Calendar Setup. The calendar lets you set up different schedules for each patron type. Your circulation records use the library hours that you set up to determine material due dates and calculate fines for overdue materials.

To access Calendar Setup

Choose **Setup > Calendar** from the **Winnebago** menu. The Calendar Setup window opens.



Calendar Setup window

Here you set up your library's schedules and weekly hours.

For information on the program elements in Calendar Setup, see "Calendar Setup program elements" in the *Setup* chapter of the *Spectrum CIRC/CAT Reference Manual*.

Managing library schedules

The calendar is used to set schedules for your library. When you first open the Calendar Setup window, there is an existing schedule named *Default* which you can customize. You can add and delete schedules, but you must always have at least one schedule in the calendar. Each schedule can include an unlimited number of years.

What are schedules?

Schedules are a custom calendar setting that you can assign to a certain patron type. Schedules contain one or more years. Years, in turn, contain your library's specific open/closed days and hours. So when you assign a schedule to a patron type (in Patron Type Setup), you determine the days and hours in which that type of patron normally uses the library. The circulation records use the library hours for such things as determining material due dates and calculating fines for overdue materials.

For example, you may want to create a different library schedule for students in a year-round school who attend three of four quarters. However, if all of your patrons use the library at the same time, you can set up and use one schedule for everyone.

Immediate changes

When you add, rename, or delete a schedule, it changes *immediately*. When you delete a schedule, you have to confirm before deleting.

How to add a schedule

You need to add a schedule before you can assign it to a patron type. You should think about when different patron types use the library and add schedules accordingly.

Example scenario: You want to add a schedule for the second grade Art class. The Art class uses the library Tuesdays and Thursdays during their scheduled class time (for the first term only, which is the months of September, October, November, and December). Closed days are calculated into the loan period, but materials will never be due on a closed day. Basically, this means that patrons from the second grade Art class can check out books on Tuesdays and Thursdays during their time in the library, and their books will always be due one of those days.

To add a schedule

- 1 From the **Winnebago** menu, choose **Setup > Calendar**. The Calendar Setup window opens.
- 2 Click the **Add New Schedule** button. The New Schedule window opens.
- 3 Type *2nd grade Art* in the **Name** box.
- 4 Click **OK**.
- 5 Choose *2nd grade Art* from the **Schedule** box, if necessary.

Add New
Schedule button



- 6 Click the **Sep** month tab.
- 7 Click all of the boxes in the **Sunday, Monday, Wednesday, Friday, and Saturday** columns to make those days unavailable.
Note: Unavailable days of the calendar are shaded.
- 8 Click **Save Changes**.
- 9 Repeat steps 7 and 8 for the **Oct, Nov, and Dec** month tabs.

Note: Make sure you click the Save Changes button before you move to a different month tab. If you switch to another tab before you save the new or updated schedule information, the information is not saved.

Now that you've created a schedule, you need to assign a patron type to it. You do this when you set up the general information for a patron type in Patron Type Setup. See "Adding patron types" in the *Patron Type Setup* section of this chapter for more information.

How to rename a schedule

Example scenario: You want to rename the History class schedule to *World History* class.

To rename a schedule

- 1 From the **Winnebago** menu, choose **Setup > Calendar**. The Calendar Setup window opens.
- 2 Choose *History class* from the **Schedule** box.
- 3 Click the **Rename Schedule** button. The Rename Schedule window opens.
- 4 Type *World History class* in the **New name** box.
- 5 Click **OK**.

Note: You cannot change the name of the Default schedule.

How to delete a schedule

You can permanently remove a schedule from the list of available schedules; however, you cannot delete a schedule to which a patron type is assigned (the program alerts you if any patron type is using the schedule). If you wish to delete a schedule that is in use, you must first assign a new schedule to each patron type that is assigned to the schedule you want to delete. A patron may not check out materials unless assigned to a schedule.

Rename
Schedule button



Example scenario: The 2000 class graduated, and you already deleted the patron type associated with that class. Now, you want to delete its schedule.

To delete a schedule

Delete Schedule
button



- 1 From the **Winnebago** menu, choose **Setup > Calendar**. The Calendar Setup window opens.
- 2 Choose *2000 class* from the **Schedule** box.
- 3 Click the **Delete Schedule** button. A confirmation window asks if you want to delete the schedule.
- 4 Click **Yes**.

Note: You cannot delete the Default schedule.

Managing your calendar

Your calendar is managed by adding and deleting years and setting up the hours for each year. When you add or delete a year, the program makes the change *immediately*. When you delete a year, a warning window asks for confirmation before deleting. When the Calendar Setup window opens, the Year box displays the current year by default.

How to add a year to the calendar

When you add more years to your calendar, each year you add acquires the hour settings of the immediately preceding year. For example, if you set up the year 1999 in your calendar and then add the year 2000, the year 2000 has the 1999 hour settings. If no immediately preceding year exists in your calendar, the new year takes on the program default settings. However, if you don't want a year to take the settings of the previous year, you can set unique hours when you set up your library hours.

Note: When you add a new year, you can choose to add it to all schedules.

Example scenario: You want to add the year 2006 to all schedules.

To add a year

Add New Year
button



- 1 From the **Winnebago** menu, choose **Setup > Calendar**. The Calendar Setup window opens.
- 2 Click the **Add New Year** button. The Add Year window opens.
- 3 Type *2006* in the **New year** box.

4 Select the **Add this year to all schedules** option.

5 Click **OK**.

How to delete a year from the calendar

You shouldn't delete a year until all materials checked out during that year have been checked in and all fines beginning in that year have been paid. Remember, you cannot recover a year you've deleted or its settings.

Example scenario: You no longer have any patron types associated with the year 1999, so you want to delete it from your calendar.

To delete a year

Delete Year button



1 From the **Winnebago** menu, choose **Setup > Calendar**. The Calendar Setup window opens.

2 Choose *1999* from the **Year** box.

3 Click the **Delete Year** button. A confirmation window opens and asks if you want to delete the year.

4 Click **Yes**.

Note: You can add a deleted year back to the calendar; however, any settings for that year are lost and will need to be reset.

How to designate the open days for a year

When you add a year, you need to designate your library's open and closed days for that year. You can change the open/closed status of any day by clicking it (closed days are shaded on the calendar). When you click a day, it switches from open to closed, and vice versa. By default, all weekends are set as closed and weekdays are set as open. To change the status of a day for the whole year (for example, to make all Saturdays open), you need to set weekly hours for each year (see "Setting your library hours" directly after this topic for more information).

If you change the status of a day, you must save your change(s) before you can go to another month.

Example scenario: Your library will be closed December 24 and 25, 2001 for the holidays. You want to make sure you mark those days closed on the library calendar.

To change the open/closed status of a day

- 1 From the **Winnebago** menu, choose **Setup > Calendar**. The Calendar Setup window opens.
- 2 Choose **2001** from the **Year** box.
- 3 Click the **Dec** month tab.
- 4 Click the days marked **24** and **25** of the December calendar to close them. *Note:* Closed days of the calendar are shaded.
- 5 Click **Save Changes**.

Setting your library hours

When you add a year to the calendar, you need to set the regular open and closed hours for each day of the week for that entire year in the Weekly Hours window in Calendar Setup. The program uses these hours for such things as calculating fines and overdues in materials with hourly loan periods. You can't set hours for individual dates; however, you can change the open/closed status of an individual date. See "How to designate the opens days for a year" earlier in this chapter for more information.

How to set weekly library hours

Example scenario: You want to set the weekly hours for your library for the 2001 calendar year. Your weekly hours are Monday–Saturday, 9 AM–5 PM and closed on Sunday. *Note:* Your library prefers 12-hour time.

To set weekly library hours

- 1 From the **Winnebago** menu, choose **Setup > Calendar**. The Calendar Setup window opens.
- 2 Choose **2001** from the **Year** box.
- 3 Click the **Set Weekly Hours** button. The Weekly Hours window opens.

Set [Weekly] Hours
button



Weekly Hours

Weekly Hours for 2000

24 Hour time
 12 Hour time

Open	Time Open	Time Closed
<input type="checkbox"/> Sun		
<input checked="" type="checkbox"/> Mon	09:00 AM	05:00 PM
<input checked="" type="checkbox"/> Tue	09:00 AM	05:00 PM
<input checked="" type="checkbox"/> Wed	09:00 AM	05:00 PM
<input checked="" type="checkbox"/> Thu	09:00 AM	05:00 PM
<input checked="" type="checkbox"/> Fri	09:00 AM	05:00 PM
<input checked="" type="checkbox"/> Sat	09:00 AM	05:00 PM

OK Cancel

- 4 Select the **12 Hour time** option.
- 5 Select all days except **Sunday** in the **Open** column.
- 6 In the **Time Open** boxes, type *09:00*.
- 7 Make sure all the **AM/PM** boxes are set to **AM** in the **Time Open** column.
- 8 In the **Time Closed** boxes, type *05:00*.
- 9 Make sure all the **AM/PM** boxes are set to **PM** in the **Time Closed** column.
- 10 Click **OK** to close the Weekly Hours window.
- 11 Click the **Save Changes** button.

Setting up the catalog

You may customize the catalog in both your Spectrum CIRC/CAT and Spectrum Patrons' Catalog programs. You should set up the catalog according to your library's needs *before* using your Spectrum program.

Catalog Setup lets you control the appearance, availability, and content of catalog windows. The options you choose determine how the catalog functions and what your patrons can do when using the catalog.



Important! If you click the Cancel button to exit any of the Catalog Setup tabs or windows, the information you just added, edited, or deleted is *not* saved.

To access Catalog Setup in Spectrum CIRC/CAT

Choose **Setup** > **Catalog** from the **Winnebago** menu. The Catalog Setup window opens.

To access Catalog Setup in Spectrum Patrons' Catalog

Choose **Catalog** > **Setup**. The Catalog Setup window opens.

For information on the program elements in Catalog Setup, see "Catalog Setup program elements" in the *Setup* chapter of the *Spectrum CIRC/CAT Reference Manual*.

Setting general catalog options

In the General tab of Catalog Setup, you set search options for the catalog, including limits on patrons' activities in the catalog. You can also set up local passwords for Patrons' Catalog.

Restricted searches

The options "Maximum number of items to find in a search" and "While searching, stop counting holdings after" in the General tab of Catalog Setup limit the extent of a search. If you enter a value for either of these options, the Materials Found window in Catalog may not display all the items or copies that meet the search requirements. Placing restrictions on searches may be useful to speed up the results of catalog searches.

The catalog lets you know when it can't display all the copies or show an accurate count of copies because of a restriction. If you limit the number of items to search for and the search exceeds the limit, a warning window displays a message, "The maximum number

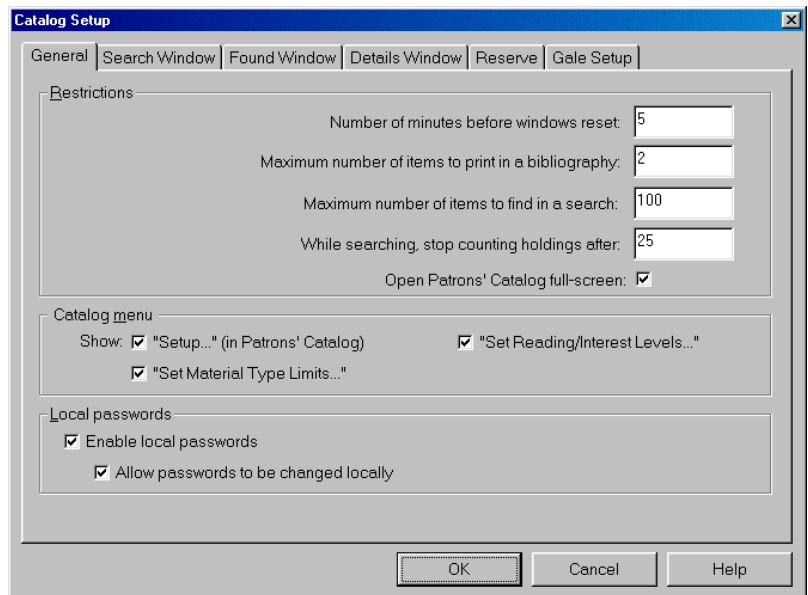
of items to find in a search has been reached. The search will be stopped." If you limit the number of copies to search for and the search exceeds the limit, the program places a plus (+) sign next to the copy in the Materials Found window in Catalog.

How to set general catalog options

Example scenario: You want to set up your general restrictions for the catalog in Catalog Setup and what items appear on the Catalog menu in Patrons' Catalog.

To set up general catalog options

- 1 Choose **Setup > Catalog** from the **Winnebago** menu. The Catalog Setup window opens with the **General** tab active.



- 2 Enter **5** in the **Number of minutes before windows reset** box. The following items are reset after the catalog is inactive for the number of minutes you specify: material type limits, locked items, search terms and indexes, and window positions.
- 3 Enter **20** in the **Maximum number of items to print in a bibliography** box.
- 4 Enter **100** in the **Maximum number of items to find in a search** box.

- 5 Enter 25 in the **While searching, stop counting copies after** box.
- 6 Select the **Open Patrons' Catalog full-screen** option.
- 7 Select **Show "Setup..." (in Patrons' Catalog), "Set Reading/Interest Levels..."**, and **"Set Material Type Limits..."** so they appear in the **Catalog** menu in Patrons' Catalog.
- 8 Select the **Enable local passwords** and **Allow passwords to be changed locally** options, so you can change your passwords to access Catalog Setup at each Patrons' Catalog computer. See "Catalog Setup—General tab" in the *Setup* chapter of the *Spectrum CIRC/CAT Reference Manual* for more information about these options.
- 9 Click **OK** to save your options and exit or click the **Search Window** tab to set up search window options.

Setting search window options

The Search Window tab in Catalog Setup lets you control the appearance, availability, and content of the Search window in both your Spectrum Catalog and Patrons' Catalog programs.

For more information about each of the options in the Search Window tab, see "Search Window tab" in the *Setup* chapter of the *Spectrum CIRC/CAT Reference Manual*.

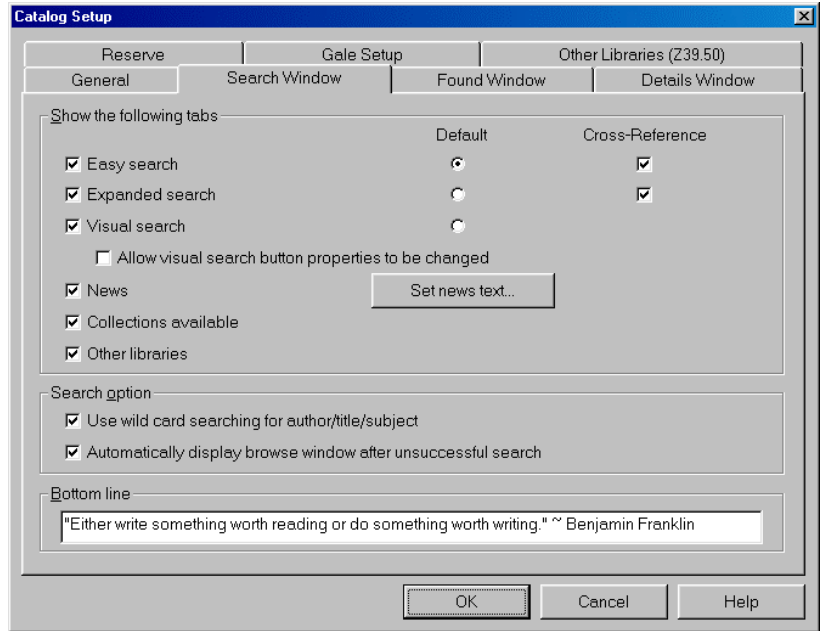
How to set search window options

Example scenario: You want to set up the Catalog window in Catalog so that patrons can use the Easy, Expanded, Visual Search tabs to search for items in the library, search remote libraries using the Other Libraries tab, read library news in the News tab, use wild card searching for author, title, subject searches, and automatically open the browse window after an unsuccessful search. To enlighten your library patrons, you want to enter a literary quote in the Bottom line box.

Note: If you select the "Other libraries" option, make sure you set up your Z39.50 information in the Other Libraries (Z39.50) tab in Catalog Setup. For more information, see "Setting up other libraries (Z39.50) options" later in this chapter or "Other Libraries (Z39.50) tab" in the *Setup* chapter of the *Spectrum CIRC/CAT Reference Manual*. The Spectrum Z39.50 Client feature may be sold separately from Spectrum CIRC/CAT. For information on obtaining this feature, contact Sagebrush's Sales Department at 1-800-533-5430.

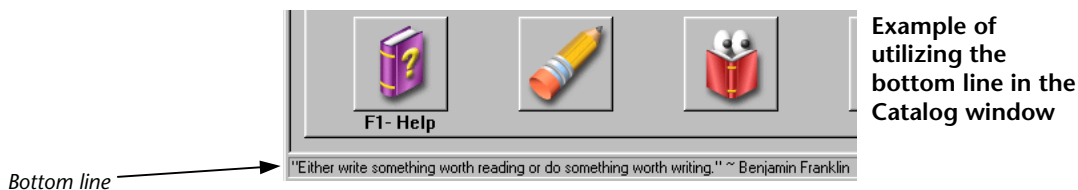
To set up Search Window options

- 1 Choose **Setup > Catalog** from the **Winnebago** menu. The Catalog Setup window opens.
- 2 Click the **Search Window** tab.



- 3 Select the **Easy search** option and make this the default tab by selecting the **Default** option directly across from the **Easy search** option.
- 4 Select the **Expanded search** option.
- 5 Select the **Visual search** option. *Note:* The Visual search option is only available if you purchase Visual Search from Sagebrush Corporation. Contact Sagebrush's Sales Department at 1-800-533-5430 for more information.
- 6 Select the **News** option and click the **Set news text** button. The News window opens.
- 7 Type *Library hours: Monday through Saturday 9 AM to 5 PM. Closed on Sunday.* and click **Save** to exit the News window and return to the **Search Window** tab.
- 8 Select the **Other libraries** option.

- 9 Select the **Use wild card searching for author/title/subject** option.
- 10 Select the **Automatically display browse window after unsuccessful search** option.
- 11 Type *"Either write something worth reading or do something worth writing." ~ Benjamin Franklin* in the **Bottom line** box.
- 12 Click **OK** to save your options and exit or click the **Found Window** tab to set up how the Materials Found window operates in the catalog.



Managing library news

You can manage your library's news at the librarian's computer, or you can save the news locally (at each Patrons' Catalog computer).

News is text you enter in the News window after you've selected the News option and clicked the "Set news text" button in the Search Window tab of Catalog Setup. Catalog users can view this text if they choose to by clicking the News tab in the Catalog window. Your news may include current events like a book sale or dance, changes to the library's open hours, end-of-term due date reminders, and so on.

Note: You can only edit and enter library news if the News option is selected in the Search Window tab in Catalog Setup.

How to add and edit library news

Example scenario: Your library is going to have an open house. You would like to invite your patrons, so you include information about it in the News window.

To manage library news

- 1 Choose **Setup > Catalog** from the **Winnebago** menu. The Catalog Setup window opens.
- 2 Click the **Search Window** tab.

- 3 Make sure **News** is selected.
- 4 Click the **Set news text** button.
- 5 Type the following message in the News window and click **Save**.

You're invited to the library Open House!!

When: Aug. 3, 2001 9 AM - 1 PM

Why: To meet and visit with the library staff

While you're here, you can browse the large selection of used books. Many great deals!!

Refreshments will be served from 10AM - Noon.

- 6 Click **OK** to exit the Catalog Setup window.

Note: You may enter up to 30,000 characters in the News window.

Setting found window options

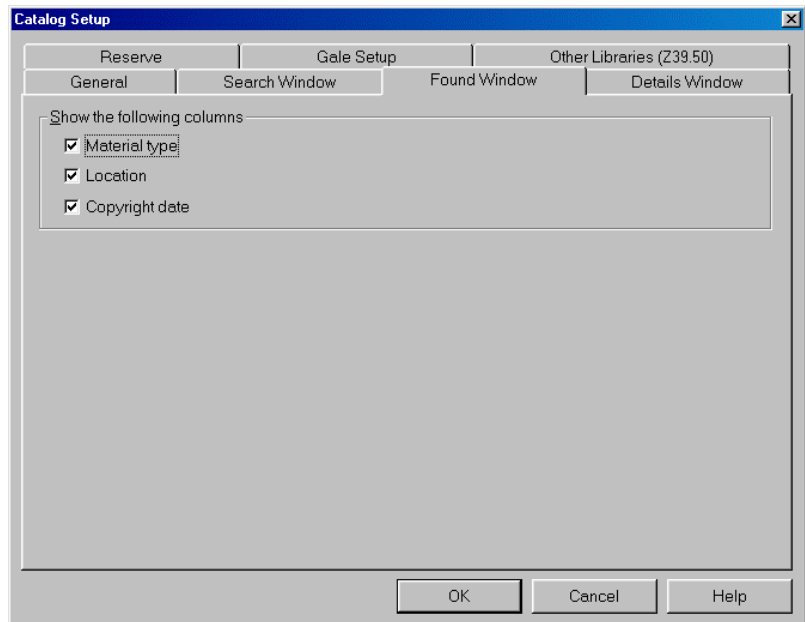
The Found Window tab in Catalog Setup lets you control the appearance and content of the Materials Found window in the catalog, which lists items located from a catalog search.

How to set found window options

Example scenario: You want to display all of the available columns in the Materials Found window.

To set up Found Window options

- 1 Choose **Setup > Catalog** from the **Winnebago** menu. The Catalog Setup window opens.
- 2 Click the **Found Window** tab.



- 3 Select the **Material type**, **Location**, and **Copyright date** options to display different information for the items found in a catalog search.
- 4 Click **OK** to save your options and exit or click the **Details Window** tab to set up details window options.

Setting details window options

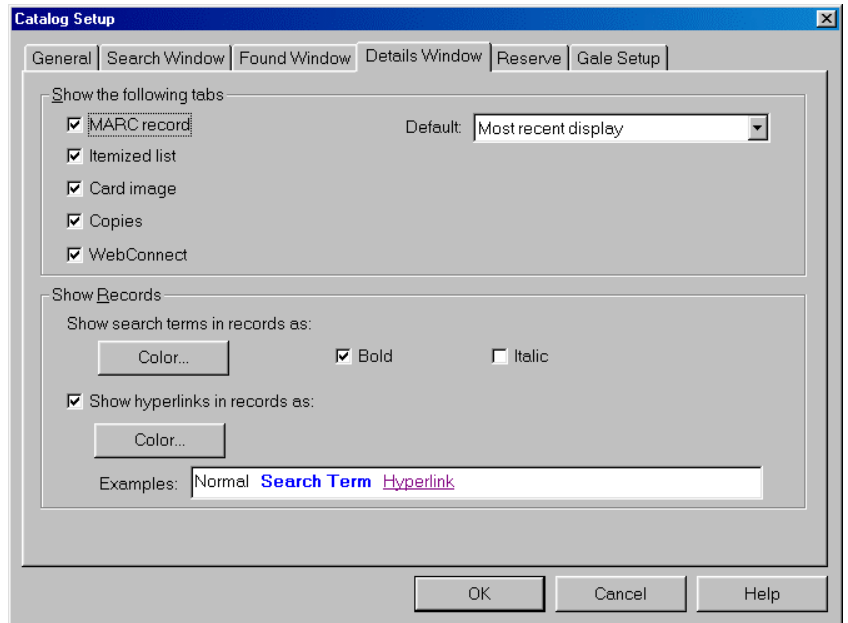
The Details Window tab in Catalog Setup lets you control the appearance and content of the Details window in the catalog.

How to set details window options

Example scenario: You want to display the following tabs in the Details window in Catalog: MARC record, Itemized list, Copies, and WebConnect. You want the default to be the Copies tab. Plus, you want to set up your search terms so that they display in bold, red text. Hyperlinks will be blue, underlined text.

To set up Details Window options

- 1 Choose **Setup > Catalog** from the **Winnebago** menu. The Catalog Setup window opens.
- 2 Click the **Details Window** tab.



- 3 Select the following tab options so they are included in the Details window in Catalog: **MARC record**, **Itemized List**, **Copies**, and **WebConnect** (this lists web addresses associated with the selected material from the Materials Found window in Catalog).
- 4 Select **Copies** from the **Default** box so that tab opens by default in the Details window in the catalog.
- 5 Under the **Show search terms in records as** option, select **Bold** and click the **Color** button.
- 6 From the color palette window that opens, select **red** as the color for how search terms are emphasized in the material records found after a search and click **OK**.
- 7 Select the **Show hyperlinks in records as** option.
- 8 Click the **Color** button and select **blue** from the color palette window and click **OK**.

- 9 Click **OK** to save your options and exit or click the **Reserve** tab to set up reserve options.

Note: We recommend that you choose different colors for your search and hyperlink terms to avoid confusion.

Setting reserve options

The Reserve tab in Catalog Setup lets you control if patrons are able to view their circulation status and/or to place reserves when using the Reserve Materials window in the catalog.



Important! If you do not have any patron records in your database, the Reserve tab is not displayed in Catalog Setup.

How to set reserve options

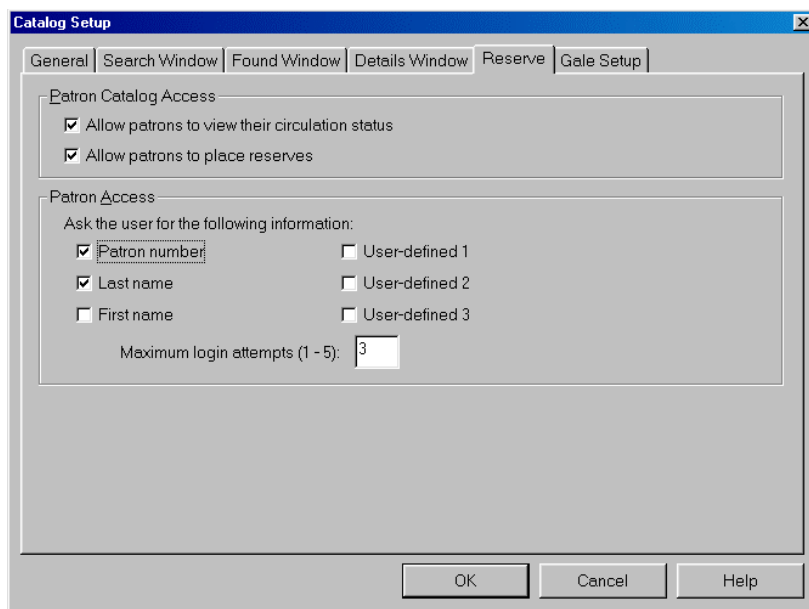
Example scenario: You want to allow your patrons to place reserves and view their circulation status; however, you want to ensure that you safeguard this process so patrons don't abuse this privilege. Patrons will have to enter their last name and patron number correctly before they can view their circulation status or place reserves. Patrons can try to access their information a maximum of three times.



Important! If you select the option to allow patrons to place reserves, you must make sure at least one of your patron types has the "Place reserves in Catalog" option selected in the Privileges tab of the Patron Type Setup window, otherwise no patrons will be able to place reserves. For more information, see "Privileges tab" in the *Setup* chapter of the *Spectrum CIRC/CAT User Manual*.

To set up reserve options

- 1 Choose **Setup > Catalog** from the **Winnebago** menu. The Catalog Setup window opens.
- 2 Click the **Reserve** tab.



- 3 Select the **Allow patrons to view their circulation status** option.
- 4 Select the **Allow patrons to place reserves** option.
- 5 From the **Patron Access** group, choose **Patron number** and **Last name**.
- 6 In the **Maximum login attempts (1-5)** box, type 3.
- 7 Click **OK** to save your options and exit or click the **Gale Setup** tab to set up proxy options.

Setting Gale setup options

Some libraries use a proxy server to connect their network to the Internet. If your library has a subscription to Gale multimedia resources and uses a proxy server, you must set up your proxy server information in the Gale Setup tab; however, it's not required that you have a proxy server to access Gale multimedia resources. If you're not sure if your library uses a proxy server, contact your network administrator.

Note: To access Gale online resource collections, you need to have a Gale multimedia subscription. Sagebrush no longer offers Gale subscriptions, but we continue to support Gale for those libraries that already have subscriptions to it.

What is a proxy server?

A proxy server is a server that connects internal networks to the Internet. If you extend your network to the Internet, a proxy server can provide firewall security, content caching, and management functions.

For a Web browser to use a proxy server, it must channel its internet requests through a proxy server. Depending on the browser, you can identify a proxy server by identifying the server's domain name or IP address.

The format of an IP address is a 32-bit numeric address written as four numbers separated by periods. Each number can be zero to 255. For example, 1.160.10.240 could be an IP address.

What is a port number?

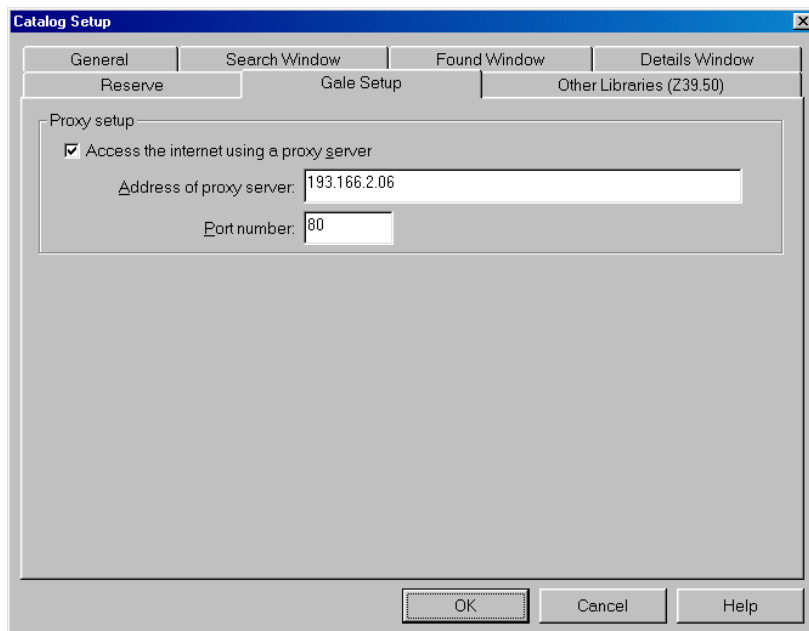
When an Internet message arrives at a proxy server, the port number identifies where that message should be forwarded. In other words, the port number identifies what type of port it is. For example, port 80 is used for HTTP traffic (port 80 is the most common Internet port number). If you're not sure what or where your port number information is, contact your network administrator.

How to set Gale setup options

Example scenario: Your library uses a proxy server to access the World Wide Web. In order for your patrons to access the Internet sites they find in their searches, you have to enter your proxy server information.

To set up proxy options for Gale setup

- 1 Choose **Setup > Catalog** from the **Winnebago** menu. The Catalog Setup window opens.
- 2 Click the **Gale Setup** tab.



- 3 Select the **Access the internet using a proxy server** option. When you select this, the other items in the tab become available.
- 4 Enter *193.166.2.06* in the **Address of proxy server** box.
- 5 Enter *80* in the **Port number** box.
- 6 Click **OK** to save your options and exit or click the **Other Libraries (Z39.50)** tab to set up Z39.50 servers to search.

Setting up other library options (for Z39.50)

With the Spectrum Z39.50 Client program, you and your patrons can search remote library databases within the Spectrum catalog. However, first you need to set up the Z39.50 servers and databases that you want to search. After you establish communication, you can search the remote databases using the Other Libraries tab in the catalog. Make sure you select the "Other libraries" option in the Search Window tab of Catalog Setup, otherwise the Other Libraries tab will not be available in the catalog. *Note:* The Spectrum Z39.50 Client feature may be sold separately from Spectrum CIRC/CAT. For information on obtaining this feature, contact Sagebrush's Sales Department at 1-800-533-5430.

Note: By default, the server and database information for fifteen Z39.50 servers is included with Spectrum. If you delete any of the servers or databases from the list, you will need to reenter the information in order to reconnect.

For more information about the Other Libraries tab and windows, see "Other Libraries (Z39.50) tab" in the *Setup* chapter of the *Spectrum CIRC/CAT Reference Manual*.

Managing Z39.50 servers

Z39.50 lets you and your patrons search any database that supports Z39.50, even if Spectrum and the database systems use different hardware and software. Z39.50 lets users see the local and remote databases in the same format, effectively allowing them to search for information in a familiar format.

There are two main components involved with every Z39.50 search: the Z39.50 client and the Z39.50 server. The Spectrum Z39.50 Client program is installed automatically when you install the Spectrum CIRC/CAT client or single-user program. In order to use the Z39.50 client to search and retrieve information from remote databases, you need to establish communication to the Z39.50 server(s) whose databases you want to search. A server (or host) is the computer where the Z39.50 server program you're trying to access is located. You should set up access to the other Z39.50 servers *before* you create a new database group.

After you add new server information to the list, you need to test it to make sure communication is successful between the Z39.50 client and server. You can also add, edit, and delete existing Z39.50 server information.

The recommended order of actions to set up a Z39.50 server and database is:

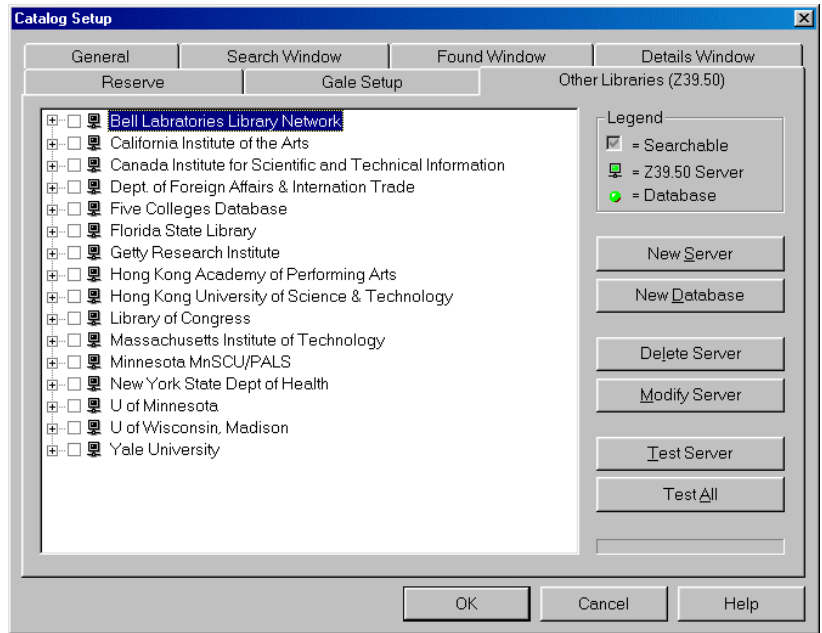
- 1 Set up the information for the remote Z39.50 server.
- 2 Set up the information for the database(s) for the Z39.50 server.
- 3 Test the connection (this way you can test both the server and database at once).

How to add a new Z39.50 server to the list of searchable servers

Example scenario: You want to connect to the CARL Corporation's Z39.50 server. The address is `wdev.carl.org` (the `www` prefix isn't needed) and the port number is 210. There is no required username or password that you need to set up.

To add a new Z39.50 server

- 1 Choose **Setup > Catalog** from the **Winnebago** menu. The Catalog Setup window opens.
- 2 Click the **Other Libraries (Z39.50)** tab.



- 3 Click the **New Server** button. The Server Properties window opens.
- 4 Type *CARL Corporation* in the **Name** box. This is the name that is displayed in the server list in both the **Other Libraries** tab in Catalog Setup and in Catalog.
- 5 Type the address in the **Address** box. In this case, type *wdev.carl.org* in the box.
- 6 Type the port number in the **Port** box. In this case, type *210* in the box.
- 7 Type a brief description of the server in the **Description** box. In this case, type *The server is based on the YAZ toolkit from Index Data.* in the box.

Server Properties

Name:

Address: Port:

Description:

Login: Username: Password:

- 8 Click **OK** to save your settings and close the Server Properties window. When you click **OK**, the Z39.50 server is added to the server list and the Database Properties window opens automatically. See "How to add and edit a database for a Z39.50 server" later in this section for more information.

Note: If you click **Cancel** to exit the **Other Libraries (Z39.50)** tab, the information you added is not saved.

For more information about the Server Properties window, see "Server Properties window" in the *Setup* chapter of the *Spectrum CIRC/CAT Reference Manual*.

How to edit the settings for a Z39.50 server

Example scenario: You want to add a description to the Library of Congress server.

To edit the settings for a Z39.50 server

- 1 Choose **Setup > Catalog** from the **Winnebago** menu. The Catalog Setup window opens.
- 2 Click the **Other Libraries (Z39.50)** tab.
- 3 Select *Library of Congress* from the server list to highlight it.

- 4 Click the **Modify Server** button. The Server Properties window opens.
- 5 Type a brief description in the **Description** box.
- 6 Click **OK** to save your settings and close the Server Properties window.

Note: If you click **Cancel** to exit the **Other Libraries (Z39.50)** tab, the information you edited is not saved.

How to delete a Z39.50 server from the list

Example scenario: You want to remove the Florida State Library server from the list.

To delete the settings for a Z39.50 server

- 1 Choose **Setup > Catalog** from the **Winnebago** menu. The Catalog Setup window opens.
- 2 Click the **Other Libraries (Z39.50)** tab.
- 3 Select *Florida State Library* from the server list to highlight it.
- 4 Click the **Delete Server** button. A confirmation window opens making sure you want to delete the server from the list.
- 5 Click **Yes**. The server and its databases are removed from the list.

Note: If you click **Cancel** to exit the **Other Libraries (Z39.50)** tab, the Z39.50 server information that you deleted is not removed from the list.

How to test an individual Z39.50 server and its database(s)

Example scenario: You want to test the server you just added, the CARL Corporation.

To test an individual Z39.50 server and its databases

- 1 Choose **Setup > Catalog** from the **Winnebago** menu. The Catalog Setup window opens.
- 2 Click the **Other Libraries (Z39.50)** tab.
- 3 Select *CARL Corporation* from the server list to highlight it.

- 4 Click the **Test Server** button. When the test is complete, a Test Results window opens showing you which items passed and failed. For more information about the test results window, see "Test Results window" in the *Setup* chapter of the *Spectrum CIRC/CAT Reference Manual*.
- 5 When you're finished viewing the information in the Test Results window, you can click the **View Messages** button to view more information about the test (see "Search Log window" in the *Setup* chapter of the *Spectrum CIRC/CAT Reference Manual* for more information) or click the **Close** button to close the window.

Note: Colors are used in the server list of the Other Libraries tab to specify the testing status. Red represents items that were tested but failed. Green represents items that were tested and passed. Black represents items that haven't been tested.

How to test all Z39.50 servers and databases

Follow the steps below to test all of the servers and databases in the list. This process may take a while to complete and cannot be interrupted, so you may want to wait to test until after the library is closed to patrons.

To test all Z39.50 servers and databases

- 1 Choose **Setup > Catalog** from the **Winnebago** menu. The Catalog Setup window opens.
- 2 Click the **Other Libraries (Z39.50)** tab.
- 3 Click the **Test All** button.

When the test is complete, a search log window opens showing you the results of the test (see "Search Log window" in the *Setup* chapter of the *Spectrum CIRC/CAT Reference Manual* for more information).

Note: Colors are used in the server list of the Other Libraries tab to specify the testing status. Red represents items that were tested but failed. Green represents items that were tested and passed. Black represents items that haven't been tested.

Managing Z39.50 databases

You must add at least one database to each Z39.50 server you have set up in order to search and retrieve information from remote databases. The database is the component that you're actually searching. If you don't have a database set up for a server, you won't have any materials in your search results for that server.

Each time you add a new database to a server, you need to test it. You can also add, edit, and delete existing databases for a Z39.50 server.

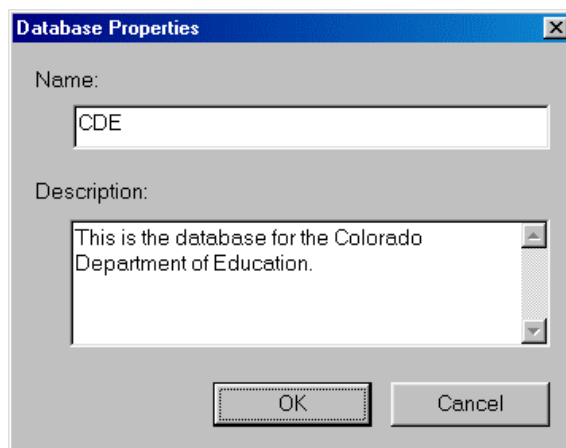
How to add and edit a database for a Z39.50 server

Example scenario: You want to add the CDE (Colorado Dept. of Education) database to the CARL Corporation server so your patrons can search that database.

To add a new database to an existing Z39.50 server

- 1 Choose **Setup** > **Catalog** from the **Winnebago** menu. The Catalog Setup window opens.
- 2 Click the **Other Libraries (Z39.50)** tab.
- 3 Select *CARL Corporation* from the server list to highlight it.
- 4 Click the **New Database** button. The Database Properties window opens.
- 5 Type *CDE* in the **Name** box. This is the name that is displayed in the server and database list in both the **Other Libraries** tab in Catalog Setup and in the catalog.

- 6 Type a brief description about the database in the **Description** box. In this case, type *This is the database for the Colorado Department of Education.* in the box.



- 7 Click **OK** to save your settings and close the Database Properties window.

Note: If you click **Cancel** to exit the **Other Libraries (Z39.50)** tab, the information you added is not saved.

Example scenario: You want to modify the CDE database description for the CARL Corporation server.

To edit the database settings for a Z39.50 server

- 1 Choose **Setup > Catalog** from the **Winnebago** menu. The Catalog Setup window opens.
- 2 Click the **Other Libraries (Z39.50)** tab.
- 3 Click the plus sign (+) in front of the *CARL Corporation* server to expand the list.
- 4 Select the *CDE* database from the list to highlight it.
- 5 Click the **Modify Database** button. The Database Properties window opens.

- 6 Make the necessary changes to the description in the **Description** box.
- 7 Click **OK** to save your settings and close the Database Properties window.

Note: If you click **Cancel** to exit the **Other Libraries (Z39.50)** tab, the information you edited is not saved.

How to delete a database from a Z39.50 server

Example scenario: You want to remove the MARION database from the Florida State Library server.

To edit the settings for a Z39.50 server

- 1 Choose **Setup > Catalog** from the **Winnebago** menu. The Catalog Setup window opens.
- 2 Click the **Other Libraries (Z39.50)** tab.
- 3 Click the plus sign (+) in front of the *Florida State Library* server to expand the list.
- 4 Select the *MARION* database from the list to highlight it.
- 5 Click the **Delete Database** button. A confirmation window opens making sure you want to delete the database from the server.
- 6 Click **Yes**. The database is removed from the list.

Note: If you click **Cancel** to exit the **Other Libraries (Z39.50)** tab, the Z39.50 database information that you deleted is not removed from the list.

Making Z39.50 servers and databases searchable

After you've set up and tested both servers and databases, you need to decide what databases patrons will be able to search. The Other Libraries tab in Catalog displays all the configured Z39.50 servers and databases, even if they didn't test correctly or if you didn't select them in Catalog Setup. However, only the *selected* Z39.50 servers and databases will be searched. You can select which databases to search in both Catalog Setup and Catalog.

How to make Z39.50 servers and databases searchable

Example scenario: You only want to let your users search the Voyager database (Library of Congress) and the YaleOPAC database (Yale University).

To make Z39.50 servers and databases searchable

- 1 Choose **Setup** > **Catalog** from the **Winnebago** menu. The Catalog Setup window opens.
- 2 Click the **Other Libraries (Z39.50)** tab.
- 3 Click the plus sign (+) in front of the *Library of Congress* server to expand the list. The *Voyager* database is displayed.
- 4 Click the box in front of the *Voyager* database to select it .
- 5 Click the plus sign (+) in front of the *Yale University* server to expand the list. The *YaleOPAC* database is displayed.
- 6 Click the box in front of the *YaleOPAC* database to select it .
- 7 Click **OK** to save your settings and close the Catalog Setup window.

Note: If you click **Cancel** to exit the **Other Libraries (Z39.50)** tab, your information is not saved.

Relationship between Catalog Setup and Patrons' Catalog

The setup options that you choose in the General tab of Catalog Setup affect how you're able to set up your local Patrons' Catalog computers. To learn more about the options in the General tab of Catalog Setup, see "Catalog Setup—General tab" in the *Setup* chapter of the *Spectrum CIRC/CAT Reference Manual*.

Each Patrons' Catalog computer checks for a local preferences file (CATSETUP.PRF) before it reads setup options from the server. If it finds a local preferences file, the Patrons' Catalog uses that file's setup options instead of the setup options from the server. To revert to the server's setup options, you must delete the local preferences file.

You can prevent patrons from changing the local preferences file (local options) at Patrons' Catalog computers by either password protecting Catalog Setup or by making the "Setup" menu item unavailable at Patrons' Catalog computers (see "Setting general catalog options" earlier in this section for how to disable this option). This saves the disabled state in the local preferences file and disables the "Setup" menu item until the

local preferences file is deleted. For more information on protecting the Patrons' Catalog, see "Security options for Patrons' Catalog" following this topic.

Security options for Patrons' Catalog

There are three primary ways you can safeguard Patrons' Catalog (listed from most secure to least secure).

- 1) Select the "Open Patrons' Catalog full-screen" option in the General tab of Catalog Setup and enter an exit Catalog password with a level greater than zero in Password Setup.** In this scenario, the Patrons' Catalog window opens in a full-screen, patrons are *not* allowed to minimize or resize the Patrons' Catalog window, and a password is required to exit the catalog. We recommend using this scenario to take full advantage of this option as a security feature.
- 2) Select the "Open Patrons' Catalog full-screen" option in the General tab of Catalog Setup and choose not to enter an exit Catalog password in Password Setup.** In this scenario, the Patrons' Catalog window opens in a full-screen, patrons are *not* allowed to minimize or resize the Patrons' Catalog window, and a password is *not* required to exit the catalog.
- 3) Do not select the "Open Patrons' Catalog full-screen" option in the General tab of Catalog Setup but enter an exit Catalog password in Password Setup.** In this scenario, the Patrons' Catalog window does *not* open in a full-screen, patrons are able to minimize or resize the Catalog window, but a password is required to exit the catalog.

Setting up circulation

You select various options to customize your library's circulation activities. The Circulation Setup window consists of several tabs, where you can access all of the Circulation Setup options.

To access Circulation Setup

From the **Winnebago** menu, choose **Setup > Circulation**. The Circulation Setup window opens.

For information on the program elements in Circulation Setup, see "Circulation Setup program elements" in the *Setup* chapter of the *Spectrum CIRC/CAT Reference Manual*.

Setting general circulation options

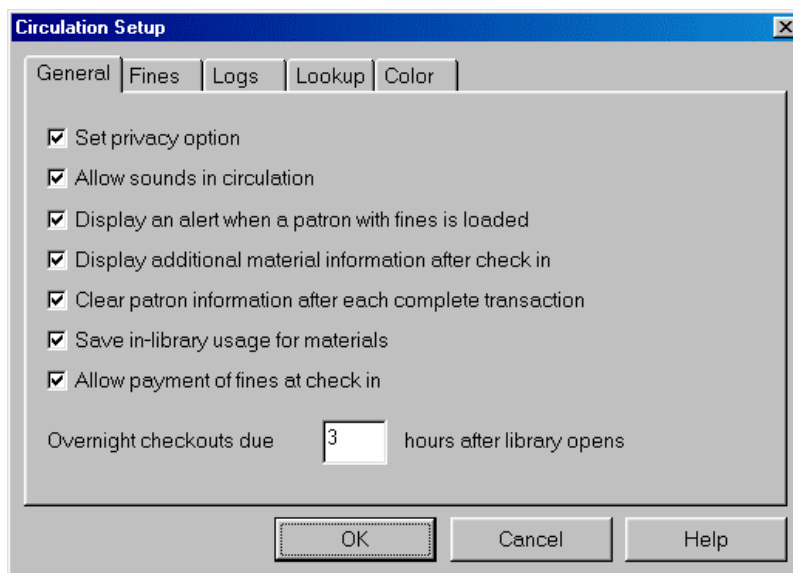
The circulation options in the General tab of Circulation Setup determine how the program functions when you perform circulation activities.

How to set general circulation options

Example scenario: You want to set up your general options for circulation activities.

To set your general circulation options

- 1 From the **Winnebago** menu, choose **Setup > Circulation**. The Circulation Setup window opens.



- 2 Click the **General** tab.
- 3 Select all of the options in the **General** tab.
- 4 In the **Overnight checkouts due ___ hours after library opens** box, type 3.
- 5 Click **OK** to save your options and close the window or click another tab to set additional circulation options.

Setting fine options

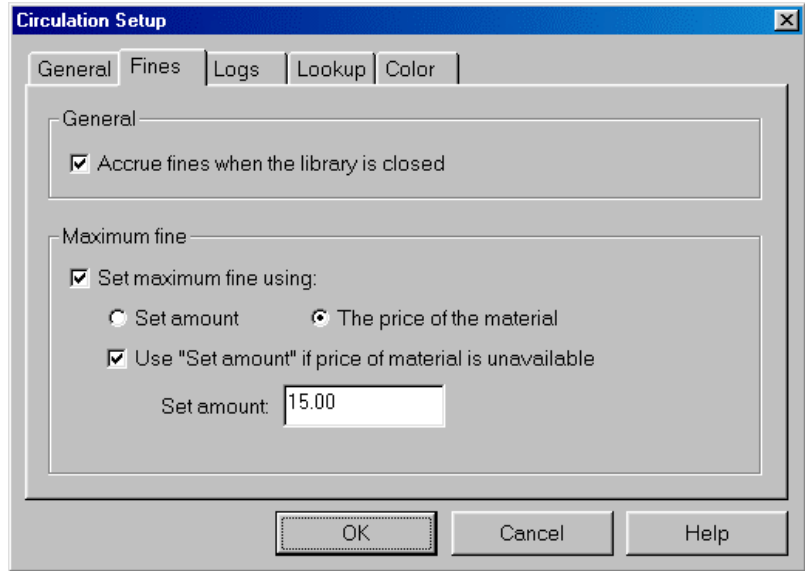
You choose circulation fine options in the Fines tab of Circulation Setup. To see fine information for patrons and materials, conduct a patron or material inquiry in the Circulation window.

How to set fine options

Example scenario: You want fines to accumulate even though your library is closed. Plus, you want the maximum fine to be based on the material's price. However, if the material's price isn't available, the backup price will be set at \$15.00.

To set your fine options

- 1 From the **Winnebago** menu, choose **Setup > Circulation**. The Circulation Setup window opens.
- 2 Click the **Fines** tab.



- 3 Select the **Accrue fines when the library is closed** option.
- 4 Select the **Set maximum fine using** option, and then select **The price of the material**.
- 5 Select the **Use "Set amount" if price of material is unavailable** option.
- 6 In the **Set amount** box, type *15.00*.
- 7 Click **OK** to save your options and close the window or click another tab to set additional circulation options.

Setting log options

You choose to log fine and circulation transactions in the Logs tab of Circulation Setup. To see circulation and fine log information for patrons and materials, conduct a patron or material inquiry in the Circulation window.

For each log to be accurate, you shouldn't turn your logs off and on frequently.



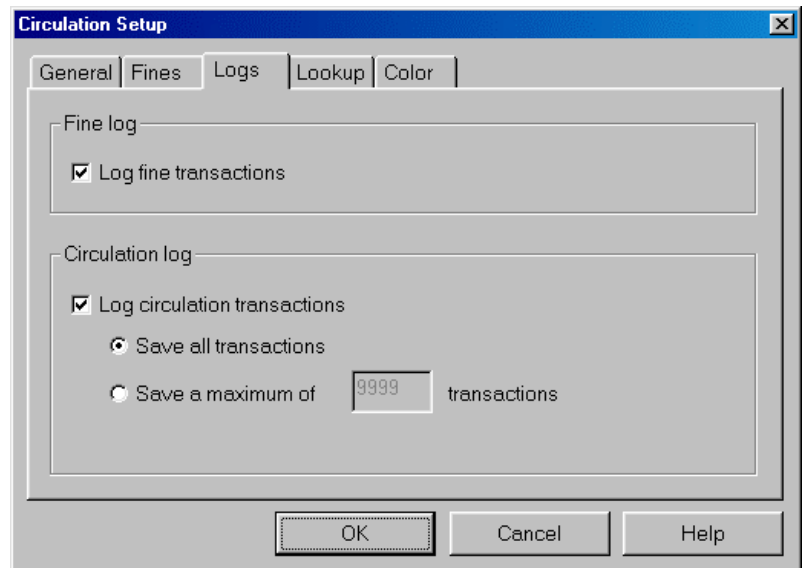
Important! If your library is part of a district using Spectrum Union Catalog, you must have your circulation log turned on in order for the Union Transaction Agent (UTA) to function properly. For more information, please refer to the Spectrum Union Catalog documentation or your district administrator.

How to set log options

Example scenario: Your library has a policy to always log fine and circulation transactions, so you want to make sure you set up the program to log transactions.

To set your log options

- 1 From the **Winnebago** menu, choose **Setup > Circulation**.
- 2 Click the **Logs** tab.



- 3 Select the **Log fine transactions** option.
- 4 Select the **Log circulation transactions** options.
- 5 Make sure you select the **Save all transactions** option.
- 6 Click **OK** to save your options and close the window or click another tab to set additional circulation options.

Note: For each log to be accurate, you shouldn't turn your logs off and on frequently.

Setting lookup options

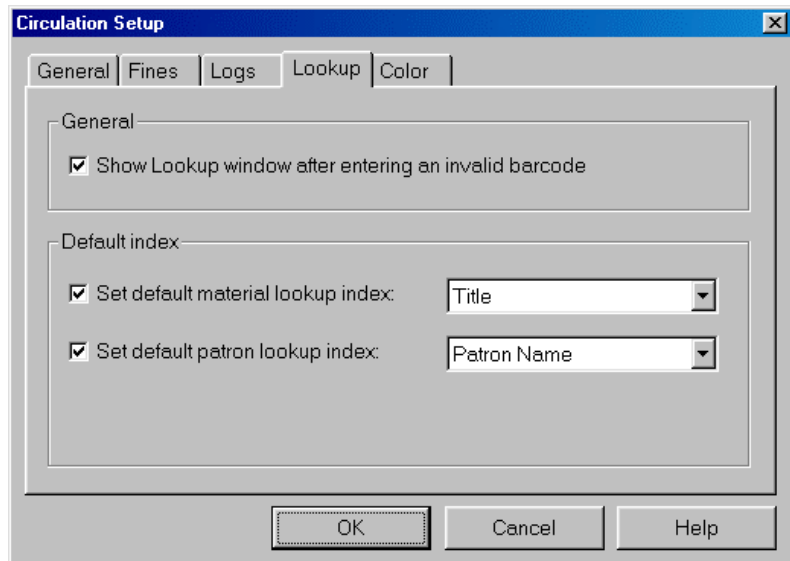
The lookup options that you choose in the Lookup tab of Circulation Setup determine how the Lookup window functions in circulation. You can set the default material and patron indexes that the Lookup window uses each time you open it. You can also choose if you want the Lookup window to automatically open whenever an invalid barcode is entered in circulation.

How to set lookup options

Example scenario: You want your library staff to have many options to look up patrons and materials in circulation, so you've decided it would be worthwhile to show the Lookup window if an invalid barcode is entered. You want to use *title* as the default material index and *patron number* as the default patron index.

To set your lookup options

- 1 From the **Winnebago** menu, choose **Setup > Circulation**. The Circulation Setup window opens.
- 2 Click the **Lookup** tab.



- 3 Select the **Show Lookup window after entering an invalid barcode** option.

- 4 Select the **Set default material lookup index** option and choose **Title** from the drop-down list.
- 5 Select the **Set default patron lookup index** option and choose **Patron Number** from the drop-down list.
- 6 Click **OK** to save your options and close the window or click another tab to set additional circulation options.

Setting circulation color options

The color options that you choose in the Color tab of Circulation Setup determine the colors of certain circulation attributes. You can set a different color for overdue items in a patron's checked out list and Check In window, holdings on special reserve, projected fines in the Fines tab in Patron Inquiry, and so on. If you specify different colors for options in Circulation Setup, it makes it easy to spot if a patron has expired privileges or fines, for example, when you load a patron in circulation.

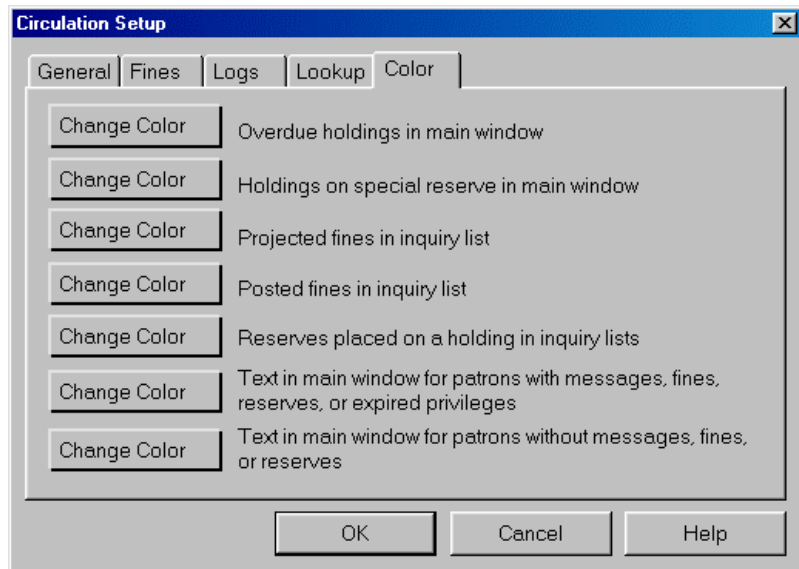
How to set circulation color options

Example scenario: You've decided you want the colors for the different circulation elements to be as follows:

Item	Color
Overdue items	Red
Holdings on special reserve	Blue
Projected fines	Navy
Posted fines	Green
Reserves placed on a holding	Purple
Text for patrons with messages, fines, reserves, or expired privileges	Teal
Text for patrons without messages, fines, or reserves	Pink

To set your color options

- 1 From the **Winnebago** menu, choose **Setup > Circulation**. The Circulation window opens.
- 2 Click the **Color** tab.



- 3 Click the **Change Color** button for all of the circulation elements, change the color as the table above indicates, and click **OK**.
- 4 Click **OK** to save your options and close the window or click another tab to set additional circulation options.

Setting up material types

Material types can group the materials in your collection into different categories. Materials of one type all share the same circulation properties, such as their renewal limit.

The program automatically installs 20 material types that you can customize to meet your library's needs. You can have up to 999 material types, but to easily manage material types, Sagebrush doesn't recommend using this many material types in your database.

To access Material Type Setup

From the **Winnebago** menu, choose **Setup > Material Types**.
The Material Types window opens.

For information on the program elements in Material Type Setup, see "Material Type Setup program elements" in the *Setup* chapter of the *Spectrum CIRC/CAT Reference Manual*.

Changing the default material type

When you import material records, the program assigns the default material type to a record if its call number pattern does not match any call number pattern you've set up. All materials assigned to the default material type share the same circulation properties.

The Material Types window displays the default material type below the list of types.

Note: One of the 20 material types installed with the program is named Default, which also happens to be the "default" material type when you begin using the program. You can rename the Default material type, and also change the default material type to a different type.

How to change the default material type

Follow the steps below to change the default material type.

To change the default material type

- 1 From the **Winnebago** menu, choose **Setup > Material Types**.
The Material Types window opens.
- 2 Select the material type that you want to make the new default material type.

- 3 Click **Change Default**. The number of the material type appears after the phrase **When no pattern matches the call number, use ___**.

Managing material types

When adding or editing a material type, you access the Material Type Setup window that has two tabs, General and Call Number Patterns. Here you set general material type options and call number patterns. You may add up to 999 material types.

How to add and set up the general options for a material type

Example scenario: Your library now has videos that patrons can check out. You'd like to add a new material type specifically set up for videos, which has a loan period of two days and allows advance bookings. To set up the call number pattern for the new material type, see "How to add a call number pattern" later in this section.

To add and set up the general options for a material type

- 1 From the **Winnebago** menu, choose **Setup > Material Types**. The Material Types window opens.
- 2 In the Material Types window, click **Add**. The New Material Type window opens. The first available unused number displays by default.
- 3 Enter the number of the new material type (or accept the default number) and click **OK**. The Material Type Setup window opens with the **General** tab active.

Material Type Setup

General | Call Number Patterns

Type: 32 Description: Video

Textbook or fixed asset

Searchable

Allow overnight checkout

Allow advance bookings

Do not display in checked out list

Loan period

Days: 2

Hours: 0

Grace period: 0 days

Fine rate: 0.00 per day

Renewal limit: 0

OK Cancel Help

- 4 Type *Video* in the **Description** box.
- 5 In the **Loan period** box, select **Days** and type 2 in the box.
- 6 Select the **Allow advance bookings** option.
- 7 Click **OK** to save the options and return to the Material Types window.

How to edit a material type

Example scenario: Members of the school staff would like to be able to book audio/visual items in advance. You comply with their needs and change the audio/visual material type so those items can be reserved in advance.

To edit a material type

- 1 From the **Winnebago** menu, choose **Setup > Material Types**. The Material Types window opens.
- 2 Select *Audio/Visual* from the material types list.
- 3 Click **Edit**. The Material Type Setup window opens.
- 4 Make sure the **General** tab is active.

5 Select the **Allow advance bookings** option.

6 Click **OK** to save the options and return to the Material Types window.



You can double-click a material type in the material types list to edit it instead of selecting the material type you want to edit and clicking the Edit button.

How to delete a material type

Example scenario: You created a temporary material type called Planets for a special class on the solar system. The class ended, so you need to delete the Planets material type.

To delete a material type

- 1 From the **Winnebago** menu, choose **Setup > Material Types**. The Material Types window opens.
- 2 Select *Planets* from the material types list.
- 3 Click **Delete**. You have to confirm that you want to delete the type.
- 4 Click **Yes**. The material type is removed from the list.

Note: You cannot delete a material type that is currently being used by materials. If you try to delete a type that is in use, the program warns that you must first change all materials of this type to another type. If you need to change materials of one type to another type, Sagebrush suggests you use the Material Batch Process part of the program. See "Batch processing materials" in the *Materials* chapter of the *Spectrum CIRC/CAT User Manual* for more information.

Managing call number patterns

In the Call Number Patterns tab you add, edit, or delete call number patterns as necessary. You also test call number patterns in this tab. You must select a material type or create a new material type before you set up call number patterns for that type. You access call number patterns from the Call Number Patterns tab when you add or edit a material type. Or, after you select the material type from the list of types in the Material Types window, click the Call Number Patterns button.

What is a call number pattern?

A call number pattern is usually a call number prefix used to assign material types to material records that don't have material type information in the 961 wl tags. All commercially available MARC records do *not* have the 961 tag, as it is defined for Sagebrush programs' local use. When you add or import material records, the program reads call number patterns of each of the material records and assigns material types accordingly. Call number patterns can be up to 14 characters long.

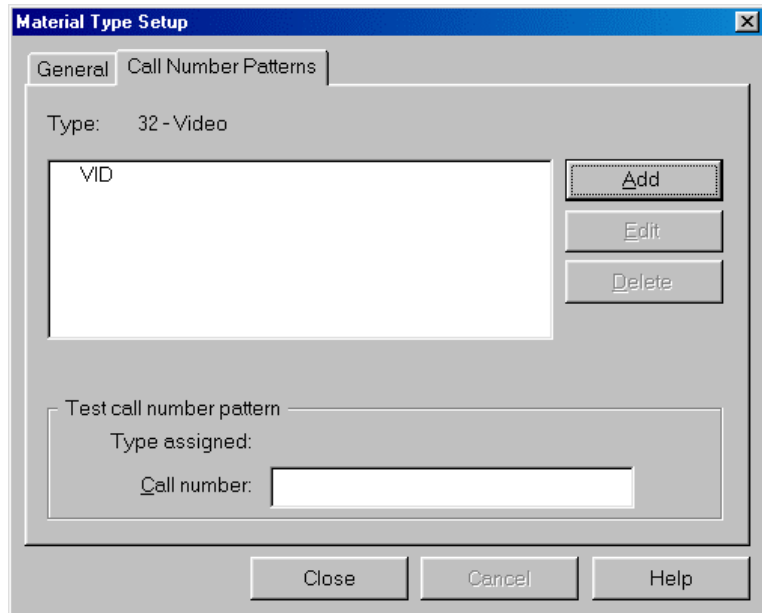
For example, you could save FIC and F as call number patterns for your material type Fiction. When you import material records with call numbers beginning with FIC or F, the program assigns these records to the material type Fiction.

How to add a call number pattern

Example scenario: Your library set up a material type called *Video*. You'd like to add the call number pattern VID to this material type.

To add a call number pattern

- 1 From the **Winnebago** menu, choose **Setup > Material Types**. The Material Types window opens.
- 2 Select *Video* from the material types list and click the **Call Number Patterns** button. The Material Type Setup window opens with the **Call Number Patterns** tab active.



- 3 Click the **Add** button. The Call Pattern window opens.
- 4 In the **Enter pattern** box, type *VID* and click **OK**. The new call number pattern is added to the call patterns list.
- 5 Click **Close** to save the call number pattern and return to the Material Types window.

Note: You cannot enter a call number pattern that is already used by another material type (the program alerts you if any material type is using the call number pattern).

How to edit a call number pattern

Example scenario: You want the call number pattern *VID* (which is assigned to the *Video* material type) to be case-sensitive.

To edit a call number pattern

- 1 From the **Winnebago** menu, choose **Setup > Material Types**. The Material Types window opens.
- 2 Select *Video* from the material types list and click the **Call Number Patterns** button. The Material Type Setup window opens with the **Call Number Patterns** tab active.

- 3 Click the **Call Number Patterns** button.
- 4 Select *VID* from the call number pattern list.
- 5 Click **Edit**. The case-sensitive symbol (see below) is placed next to the call number pattern in the call patterns list.
- 6 Select **Case-sensitive** and click **OK**.
- 7 Click **Close** to save the call number pattern and return to the Material Types window.

Case-sensitive symbol



This symbol, displayed in the Call Number Patterns tab of the Material Type Setup window, means that the call number pattern is case-sensitive, which is a setting that tells the program to distinguish uppercase letters from lowercase letters.

How to delete a call number pattern

Example scenario: You created two call number patterns for the *Fiction* material type, *F* and *FIC*. You decide you only want to use *FIC*, so you need to delete the *F* call number pattern.

To delete a call number pattern

- 1 From the **Winnebago** menu, choose **Setup > Material Types**. The Material Types window opens.
- 2 Select *Fiction* from the material types list and click the **Call Number Patterns** button. The Material Type Setup window opens with the **Call Number Patterns** tab active.
- 3 Select *F* from call number patterns list.
- 5 Click **Delete**. The Delete Call Pattern window opens.
- 6 Click **Yes**.
- 7 Click **Close** to save the options and return to the Material Types window.

How to test a call number pattern

You test a call number pattern to verify that it assigns the correct material type to a material imported into the program. Testing ensures that the pattern doesn't conflict with an existing pattern.

Example scenario: You want to test the FIC pattern for the *Fiction* material type.

To test a call number pattern

- 1 From the **Winnebago** menu, choose **Setup > Material Types**. The Material Types window opens.
- 2 Select *Fiction* from the material types list and click the **Call Number Patterns** button. The Material Type Setup window opens with the **Call Number Patterns** tab active.
- 3 Type *FIC* in the **Call number** box of the **Test call number pattern** group. The program displays the material type that matches or is closest to FIC.
- 4 Click the **Close** button.

Setting up passwords

Setting up your passwords protects your program from being accessed by unauthorized personnel. You can use up to nine passwords throughout your program.

You provide a password for each level your library wants to set up a password for. Then, you assign a level to each password-protected part of the program. You can then access that part of the program by using the assigned level password or any higher level password.

A password is made up of characters that can serve as a code. Those who don't know this code can't access any program functions beyond the password window. In this way you protect various parts of the program with your own passwords.



Important! The default level nine password (or master password) is **CIRC**. We recommend you change it to a word more unique to the person(s) using the level nine password. See "Setting password levels" directly after this topic for more information.

To access Password Setup

- 1 Choose **Setup > Passwords** from the **Winnebago** menu. You are prompted to enter the master password. The default master password is CIRC (in all capital letters). We advise that you change the master password to a word more unique to the person(s) using the master password. See "Setting password levels" directly after this topic for more information.
- 2 Enter the master password and click **OK**. The Password Setup window opens with the **Passwords** tab active.

For information on the program elements in Password Setup, see "Password Setup program elements" in the *Setup* chapter of the *Spectrum CIRC/CAT Reference Manual*.

Setting password levels

You need to set the password levels in the Passwords tab of Password Setup before you designate which areas fit into those levels. The program identifies level nine as the *master password*, which allows access to any command, function or area when entered at any password prompt. Because the master password allows access to any part of the program, only authorized staff should know it. Level zero indicates that the program does not require a password for that function of the program. You do not need to set a password for each level. Only the level nine password must be filled in.



Important! The level nine box *must* hold a password. The default level nine password is **CIRC**. We recommend you change it to a word more unique to the person(s) using the level nine password.

Passwords can contain up to 20 characters. These can be letters, numbers, symbols and spaces. Higher-level passwords override lower-levels; therefore, level nine supersedes all of them. This manual provides a *Passwords Level Worksheet* (located at the end of this section in this chapter), so you can keep a record of the passwords you set up.

How to set password levels

Follow the steps below to set up your password levels.

To set your nine passwords

- 1 Choose **Setup** > **Passwords** from the **Winnebago** menu. You are prompted to enter the master password. The default master password is CIRC (in all capital letters). We advise that you change the master password to a word more unique to the person(s) using the master password. See "Setting password levels" directly after this topic for more information.
- 2 Enter the master password and click **OK**. The Password Setup window opens with the **Passwords** tab active.
- 3 Select **Case-sensitive**, if applicable. This applies to all password levels.
- 4 Type a password for each level or as desired.
- 5 Click **Save** to save your password settings. Now you can assign each program feature to a password level. See "Protecting your program features with passwords" directly after this topic for more information.
- 6 Record each password in your *Passwords Level Worksheet* (located at the end of this section in this chapter).

Protecting your program features with passwords

In Spectrum CIRC/CAT, you set the password levels for a variety of commands, functions, and areas in the following categories: General, Materials, Setup, Reports, Catalog, Circulation, Circulation Inquiry, and Patrons. You should save the levels you set up in the current tab before you switch to another category tab. If you switch to another

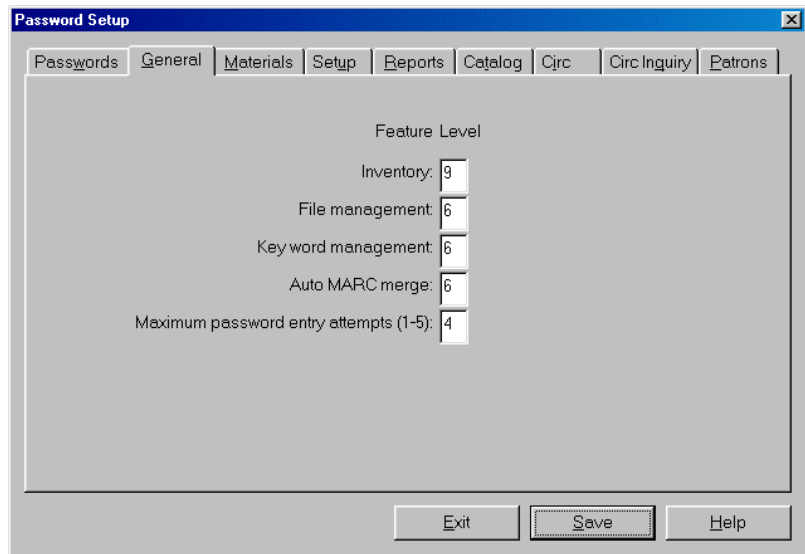
tab before you save the new or updated password information, the information is not saved.

How to assign a password level to a program feature

Example scenario: You want to set up the password levels for the items listed on the General tab in Password Setup, which are inventory, file management, key word management, and auto MARC merge. Because you only want experienced personnel using them, you want to set up high-level password protection for each feature. Remember, the level nine password is considered the master password, which allows access to all parts of the program. You also want to set the maximum entry attempts to four.

To assign a password level to a program feature

- 1 Choose **Setup > Passwords** from the **Winnebago** menu. You are prompted to enter the master password. The default master password is CIRC (in all capital letters). We advise that you change the master password to a word more unique to the person(s) using the master password. See "Setting password levels" directly after this topic for more information.
- 2 Enter the master password and click **OK**. The Password Setup window opens with the **Passwords** tab active.
- 3 Click the **General** tab to make it active.



- 4 Type 9 in the **Inventory** box. (This means that personnel must enter a level 9 password to access Inventory.)
- 5 Type 6 in the **File management** box. (This means that personnel must enter a level 6 password or higher to access File Management.)
- 6 Type 6 in the **Key word management** box. (This means that personnel must enter a level 6 password or higher to access Key Word Management.)
- 7 Type 6 in the **Auto MARC merge** box. (This means that personnel must enter a level 6 password or higher to access Auto MARC Merge.)
- 8 Type 4 in the **Maximum password entry attempts (1-5)** box.
- 9 Click **Save** to save your password settings.
- 10 Record each feature's password level in your *Passwords Level Worksheet* (located at the end of this section in this chapter).

When you set up the levels for the rest of the tabs in Password Setup, think carefully about what areas of the program you want to give easy access to (lower-level access) and what areas you want to make it more difficult to access (higher-level access). For example, you might want to let your student helpers or interns know the level one password, your full-time library staff to know the level six password, while only you and your assistant know the level nine (or master) password.



If you don't want to password-protect a feature, enter 0 (zero) in the Level box for that feature.

Accessing a password-protected feature

When you attempt to access a password-protected function, the password prompt appears. You access the function by entering one of three passwords:

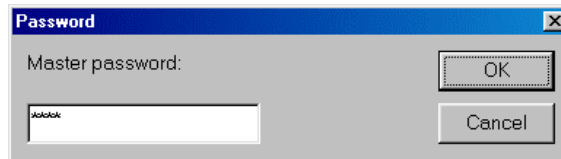
- The password for the level assigned to that function.
- Any password assigned to a higher level of protection (for example, you could enter the level eight password for a function assigned a level five password).
- The level nine master password.

How to access a password-protected feature

Follow the steps below to access a password-protected feature.

To access a password-protected feature

- 1 At the password prompt, enter the password assigned to that function, any password assigned to a higher level of protection, or the master password. An asterisk appears for each character or space you type.



Password window
A window like this opens when you access a feature that is password-protected.

- 2 Click **OK**.

You are notified if you enter an incorrect password. You can either reenter the password (as many times as you can based on the number set for the maximum password entry attempts) or click **Cancel** to exit the window.

Passwords Level Worksheet

Use this worksheet as a master copy for your passwords and password levels. When you're ready to set up your passwords, photocopy this worksheet (pages 66-68). Then, list the passwords and password levels that you set up on the photocopied version. If you ever need to change your passwords, you can create a new photocopy to list your updated passwords. Remember to store the worksheet copy that contains your passwords in a safe place, so only authorized personnel can access it.

Enter passwords for each level (Password Setup—Passwords tab)

Note: Passwords can contain up to 20 characters each.

Level 1 _____ Level 4 _____ Level 7 _____

Level 2 _____ Level 5 _____ Level 8 _____

Level 3 _____ Level 6 _____ Level 9 _____

Case-sensitive Not case-sensitive

Enter a password level for each program feature (0–9)

General

Inventory File management Key word management Auto MARC merge

Maximum password entry attempts (1-5)

Materials

Import materials Export materials Edit materials Material batch processing

Global subject edit Material custom indexes Material quick add

Setup

Location setup Calendar setup Catalog setup Circulation setup

Material type setup Patron type setup SLIP printer setup

Reports

Circulation reports Circulation statistics Circulation notices System reports

Material reports Inventory reports Labels

Catalog

Enter catalog Print bibliographies Exit catalog

Circulation

Enter circulation Check in Check out Check out/set date

Circulation override Mark materials lost Renew patron Add fine

Negotiate fine Collect fine Renew materials Reserve title

Reserve holding Special reserve Advance booking

Circulation Inquiry

Patron general Patron reserves Patron advance bookings Patron messages

Patron fines Patron circ log Patron fine log Material general

Material reserves Material advance bookings Material messages Material circ log

Patrons

- Import patrons
- Export patrons
- Edit patrons
- Patron batch processing
- Patron custom index
- Import patron images

Enter Spectrum Server password

This password is requested in the FairCom Server Shutdown window when you shut down Spectrum Server. Directions for changing this password are located in the *Server* chapter in the *Spectrum CIRC/CAT User Manual*. The default Spectrum Server password is ADMIN (all caps). *Note:* This password is case-sensitive.

Spectrum Server password _____

Setting up patron types

By setting up patron types, you're grouping your library's patrons into different categories, so you can specify circulation privileges for each type. Patrons of one type all share the same circulation privileges (such as the same schedule or being able to check out with fines). Examples of patron types are Staff, 01 Class, Senior Citizen, and Teacher. Each patron must be associated with a patron type.

You should set up patron types before you add patrons to your database. You can have up to 999 patron types, but Sagebrush doesn't recommend using this many patron types in your database. Both setting up patron types before adding them to your database and limiting the number of patron types you set up can make patron management a much easier task.

To access Patron Type Setup

From the **Winnebago** menu, choose **Setup > Patron Types**. The Patron Types window opens.

Until you add patron types, the Patron Types window is empty. If you already have patron types set up, use the scroll bar to view all patron types.

For information on the program elements in Patron Type Setup, see "Patron Type Setup program elements" in the *Setup* chapter of the *Spectrum CIRC/CAT Reference Manual*.

Adding patron types

When adding patron types, you access a window with two tabs in which you set general patron type options and privileges. You may add up to 999 patron types.

In the General tab of Patron Type Setup, you set user-defined fields, the associated schedule, expiration date, and global due date for each patron type.

Privileges are options that determine how a type of patron can use the library. In the Privileges tab of Patron Type Setup, you set up unique privileges for each patron type.

You can override some privilege violations in circulation. For example, if a patron who has fines attempts to check out materials and his or her patron type doesn't allow checkouts with fines, the program warns you. You can either cancel the checkout or check the materials out to the patron despite the fines.

About expiration dates

Privileges for each patron type can expire either on a fixed date or after a certain length of time. The fixed date method (MM/DD/YYYY) is often used for patrons who receive library privileges in groups, such as students at a school library. If you set a specific date, you may want to edit it periodically to keep it current. Public libraries often choose to do this if they want patrons to renew their cards annually.

The "n months" method is often used for patrons who receive library privileges at differing times, such as patrons of a public library. In this way, you grant all patrons privileges for the same length of time regardless of their starting date.

About global due dates

In a school library, the global due date is often one or two weeks before the last day of school. For example, if you set May 27 as the global due date, materials are due no later than May 27. Even if a patron checks out a material with a two-week loan period on May 26, the material is due May 27.

Materials checked out after you set the global due date are due no later than the global due date, even if they are renewed. *Note:* Due dates of materials that were checked out before you set the global due date are not affected.

You may decide to have different global due dates for different patron types. For example, in order to eliminate a pileup of returned materials at the end of a school year, you could assign a different due date to each grade level.

How to add a patron type

Example scenario: A new Freshmen class is starting their first year of high school, so you need to set up a new patron type. The class graduates in 2004.

To add a patron type

- 1 From the **Winnebago** menu, choose **Setup > Patron Types**. The Patron Types window opens.
- 2 In the Patron Types window, click **Add**. The New Patron Type window opens. The first available unused number displays by default.
- 3 Enter the number of the new patron type (or accept the default number) and click **OK**. The Patron Type Setup window opens with the **General** tab active.

The image shows a 'Patron Type Setup' dialog box with two tabs: 'General' and 'Privileges'. The 'General' tab is active. It contains the following fields and options:

- Type: 3
- Description: 2004 Class
- User-defined 1 field name: Homeroom teacher
- User-defined 2 field name: Parent's name(s)
- User-defined 3 field name: Emergency Cnct.
- Schedule: Class 2004 (dropdown menu)
- Privileges expire on: 06/15/2004
- Privileges expire after: 12 months
- Global due date: (empty field)

At the bottom of the dialog are three buttons: OK, Cancel, and Help.

- 4 In the **General** tab, type *2004 Class* in the **Description** box.
- 5 In the **User-defined 1 field name** box, type *Homeroom teacher*.
- 6 In the **User-defined 2 field name** box, type *Parent's name(s)*.
- 7 In the **User-defined 3 field name** box, type *Emergency contact*.
- 8 Choose *2004 Class* from the **Schedule** drop-down list.
- 9 Select the **Privileges expire on** option and type *06/15/2004*.
- 10 Click the **Privileges** tab.

Patron Type Setup

General Privileges

Type: 3 - 2004 Class

Allow patron to:

- Place reserves in Catalog
- Check out with fines
- Check out with overdues
- Renew overdues
- Exceed renewal limit
- Set their own due date: days.

Checkout limit:

- Display materials currently out
- Special fine rate per day or hour:

OK Cancel Help

- 11 Select the **Place reserves in Catalog** and **Renew overdues** options.
- 12 Type **15** in the **Checkout limit** box.
- 13 Select the **Display materials currently checked out** option, if necessary.
- 14 Click **OK** to save the options and return to the Patron Types window.



If your library is a school library, consider naming student patron types for the year they'll graduate (or move to another school) rather than the grade they're currently in. For example, use "01 Class" instead of "12th Grade." This simplifies things when the students advance to the next grade—you won't have to change their patron types.

Editing patron types

Editing a patron type changes the options of an existing patron type. You might need to edit a patron type for a simple reason, such as increasing the checkout limit or modifying when the privileges expire. Think carefully before you change a patron type description or user-defined field because you may be using this information elsewhere in the

program. Remember, you are changing the settings of every patron assigned to that patron type.

How to edit a patron type

Example scenario: The second grade class, which is assigned to the patron type called *2003 class*, is doing a special project on their family history. Currently, their patron type checkout limit is set at five. The second grade teacher has requested that their checkout limit be increased to ten. You comply and edit the patron type accordingly.

To edit a patron type

- 1 From the **Winnebago** menu, choose **Setup > Patron Types**. The Patron Types window opens.
- 2 Select *2003 class* from the patron types list.
- 3 Click **Edit**. The Patron Type Setup window opens.
- 4 Click the **Privileges** tab to make it active.
- 5 In the **Checkout limit** box, change *5* to *10*.
- 6 Click **OK** to save the options and return to the Patron Types window.



You can double-click a patron type in the patron types list to edit it instead of selecting the patron type you want to edit and clicking the Edit button.

Deleting patron types

You can delete a patron type from your list of types; however, you cannot delete a type that is currently assigned to patrons. If you try to delete a type that is in use, the program warns that you must first change all patrons of this type to another type. If you need to change patrons of one type to another type, Sagebrush suggests you use the Patron Batch Process part of the program. See "Batch processing patrons" in the *Patrons* chapter of the *Spectrum CIRC/CAT User Manual* for more information.

How to delete a patron type

Example scenario: The 2000 class graduated, so you want to delete its patron type.

To delete a patron type

- 1 From the **Winnebago** menu, choose **Setup > Patron Types**.
The Patron Type window opens.
- 2 Select *2000 class* from the patron types list.
- 3 Click **Delete**. The program prompts you to confirm that you want to delete the type.
- 4 Click **Yes**. The patron type is removed from the list.

Setting up SLIP printer

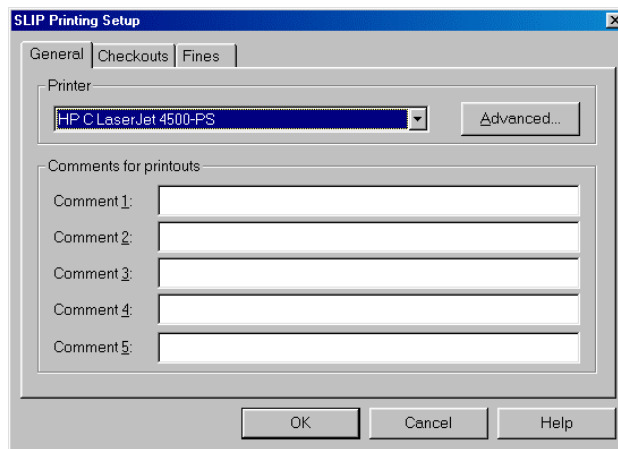
With Sagebrush's add-on SLIP program, you can produce receipt-sized printouts for your library patrons to use as a record of their circulation activity, fine amounts, and catalog searches. SLIP is short for Supply Library Information to the Patron. You can set up and generate the following types of printouts:

- checkout receipts
- fine notices
- fine receipts

Spectrum SLIP is sold separately from your Spectrum program. To purchase Spectrum SLIP, contact your local Sagebrush sales representative or call Sagebrush's Sales Department at 1-800-533-5430. Installation directions for Spectrum SLIP are included in the *Spectrum CIRC/CAT Installations Guide*.

To access SLIP Setup in Spectrum CIRC/CAT

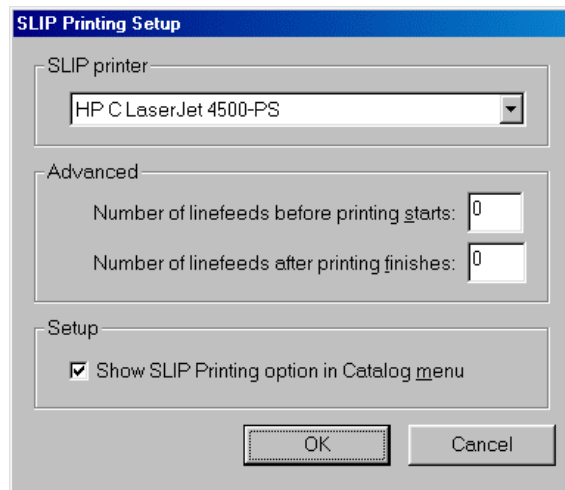
Choose **Setup > SLIP Printer** from the **Winnebago** menu. The SLIP Printing Setup window opens.



SLIP Printing Setup window (in Spectrum CIRC/CAT)
Here you set up options for your checkout receipts, fine receipts, fine notices, and bibliographies.

To access SLIP Setup in Patrons' Catalog

Choose **SLIP Printing** from the **Catalog** menu. The SLIP Printing Setup window opens.



SLIP Printing Setup window (in Patrons' Catalog)

Here you set up options for catalog bibliographies.

For information on the program elements in SLIP Printer Setup, see "SLIP Printer Setup program elements" in the *Setup* chapter of the *Spectrum CIRC/CAT Reference Manual*.

Setting SLIP printing options in Spectrum CIRC/CAT

To print slips, you need to purchase the Spectrum SLIP add-on program for Spectrum. For details, contact Sagebrush Corporation's Sales Department at 1-800-533-5430.

For Spectrum CIRC/CAT, you set up your SLIP printing options in the General, Checkouts, and Fines tabs of the SLIP Printing Setup window. In the General tab of SLIP Printing Setup, you select the printer and add any comments that you want to appear on your SLIP printouts. Linefeeds can be added to your SLIP printouts by clicking the Advanced button. You set up the options for checkout receipts, including the information each printout contains, such as the patron's name, barcode number, and the date and time of the printout, in the Checkouts tab of SLIP Printing Setup. In the Fines tab of SLIP Printing Setup, you have the option to print fine receipts automatically from circulation when patrons pay fines. You can customize your fine receipts and notices by choosing to include additional items.

If you want to include your library's name and address on your checkout receipts, fine receipts, or fine notices, make sure you've set up your general location information in Location Setup. See "Setting general location information" in the Location Setup section of this chapter for more information.



Important! You need to set up your SLIP printing options for Patrons' Catalog locally (at each Patrons' Catalog station). See "Setting SLIP printing options for Patrons' Catalog" at the end of this section for more information.

How to set general SLIP printing options in Spectrum CIRC/CAT

To print slips, you need to purchase the Spectrum SLIP add-on program for Spectrum. For details, contact Sagebrush Corporation's Sales Department at 1-800-533-5430.

Example scenario: The printer that you ordered with your Spectrum SLIP program is a STAR TSP 200-24 printer. After you successfully connect the printer and install the SLIP software, you will have a printer driver listed in the General tab in SLIP Setup called "StarDP8340 (Receipt)". Make sure you choose this printer from the Printer list. You also want to set up additional information, such as your library's phone and fax number, to print on each of your SLIP printouts.

Note: The printer driver used in the example is for Windows NT and Windows 2000. If you're using a different operating system, your printer driver may be different.

To set general slip options

- 1 Choose **Setup > SLIP Printer** from the **Winnebago** menu. The SLIP Printing Setup [for Spectrum CIRC/CAT] window opens with the **General** tab active.
- 2 From the **Printer** drop-down list, select **StarDP8340 (Receipt)** as your printer.
- 3 Type *Ph: 555-635-4827* in the **Comment 1** box.
- 4 Type *Fax: 555-635-4828* in the **Comment 2** box.
- 5 Click **OK** to save the settings and close the SLIP Printing Setup window or click another tab to set additional SLIP printing options.



Important! Before you print a SLIP receipt, make sure the "Print Receipts" option is selected from the Circulation menu in the Circulation part of the program.

To set up advanced SLIP printing options using the Advanced button, see the "How to set advanced SLIP options in Spectrum CIRC/CAT" topic later in this section.

How to set advanced SLIP options in Spectrum CIRC/CAT

To print slips, you need to purchase the Spectrum SLIP add-on program for Spectrum. For details, contact Sagebrush Corporation's Sales Department at 1-800-533-5430.

Advanced SLIP printing options let you add linefeeds before and after the information on your SLIP printouts. You may want to add linefeeds if your receipts are not printing correctly (see SLIP troubleshooting in the *Troubleshooting* appendix of the *Spectrum CIRC/CAT Reference Manual* for details).

Example scenario: You want to ensure that the first line of your receipt information clearly prints on your SLIP receipts, so you add a couple of linefeeds before the printer starts printing.

To set advanced SLIP printing options

- 1 Choose **Setup > SLIP Printer** from the **Winnebago** menu. The SLIP Printing Setup window opens with the **General** tab active.
- 2 Click the **Advanced** button. The Advanced SLIP Printer Setup window opens.
- 3 In the **Linefeeds before printing starts** box, type 2.
- 4 Click **OK** to save your settings and close the Advanced SLIP Printer Setup window.
- 5 Click **OK** again to close the SLIP Printer Setup window or click another tab to set additional SLIP printing options.

How to set checkout receipt printing options

To print slips, you need to purchase the Spectrum SLIP add-on program for Spectrum. For details, contact Sagebrush Corporation's Sales Department at 1-800-533-5430.

Checkout receipts only include posted, not *projected*, fines. Also, if you select "Print receipt after checkouts" in the Checkout tab but don't select any options or comments, your checkout receipts include only the patron's name and barcode number and the date and time of the printout.

Example scenario: After each completed checkout or renewal transaction, you want a checkout receipt to print automatically. You want the following items to be printed on

each receipt: materials being checked out, materials currently checked out, available reserves, any existing fines, the library name and address, and comments 1 and 2.

To set checkout receipt options

- 1 Choose **Setup > SLIP Printer** from the **Winnebago** menu. The SLIP Printer Setup window opens with the **General** tab active.
- 2 Click the **Checkouts** tab to make it active.
- 3 Select **Print receipt after checkouts** to print checkout receipts automatically after a checkout or renewal transaction is completed.
- 4 Select the following options: **materials being checked out, materials currently checked out to patron, available reserves for patron, patron's fines, and library name and address.**
- 5 Next to **Print comments**, select boxes **1** and **2**.
- 6 Click **OK** to save your settings and close the SLIP Printing Setup window or click another tab to set additional SLIP printing options.



Important! Before you print a checkout receipt, make sure the "Print Receipts" option is selected from the Circulation menu in the Circulation part of the program.

How to set fine receipts and notice printing options

To print slips, you need to purchase the Spectrum SLIP add-on program for Spectrum. For details, contact Sagebrush Corporation's Sales Department at 1-800-533-5430.

If you select "Print receipt after fine payment" in the Fine receipt options group box in the Fines tab but don't select any options or comments, your fine receipts include only the patron's name and barcode number and the date and time of the printout.

Example scenario: After each fine you collect, you want a fine receipt to print automatically. You want the following items to be printed on each fine receipt: fines that are being paid, remaining materials with fines, library's name and address, and comments 1 and 2. You also want to print fine notices that contain posted and projected fines, library's name and address, and comments 1 and 2.

To set checkout receipt options

- 1 Choose **Setup > SLIP Printer** from the **Winnebago** menu. The SLIP Printing Setup window opens with the **General** tab active.

- 2 Click the **Fines** tab to make it active.
- 3 Select the following fine receipt options in the **Fine receipt options** group: **Print receipt after fine payment**, **Print fines that are being paid**, **Print remaining materials with fines**, and **Print library name and address**.
- 4 Next to **Print comments** in the **Fine receipt options** group, select boxes **1** and **2**.
- 5 Select the following fine notice options in the **Fine notice options** group: **Print posted fines**, **Print projected fines**, and **Print library name and address**.
- 6 Next to **Print comments** in the **Fine notice options** group, select boxes **1** and **2**.
- 7 Click **OK** to save the settings and close the SLIP Printing Setup window.



Important! Before you print a fine receipt or notice, make sure the "Print Receipts" option is selected from the Circulation menu in the Circulation part of the program.

Setting SLIP printing options in Patrons' Catalog

To print slips, you need to purchase the Spectrum SLIP add-on program for Spectrum CIRC/CAT. For details, contact Sagebrush Corporation's Sales Department at 1-800-533-5430.

The Spectrum SLIP software lets you and your patrons print bibliographies from Patrons' Catalog using your SLIP printer.

You set up your SLIP printing options for Patrons' Catalog locally (at each Patrons' Catalog station).

How to set SLIP printing options in Patrons' Catalog

To print slips, you need to purchase the Spectrum SLIP add-on program for Spectrum. For details, contact Sagebrush Corporation's Sales Department at 1-800-533-5430.

Example scenario: The printer that you ordered with your Spectrum SLIP program is a STAR TSP 200-24 printer. After you successfully connect the printer and install the SLIP software, you will have a printer driver listed in the SLIP Printing Setup window in Patrons' Catalog called "StarDP8340 (Receipt)". Make sure you choose this printer from

the Printer list. You also want to ensure that the first line of your bibliography information clearly prints, so you add a couple linefeeds before the printer starts printing.

Note: The printer driver used in the example, is for Windows NT and Windows 2000. If you're using a different operating system, your printer driver may be different.

To set up SLIP printing options in Patrons' Catalog

- 1 Choose **SLIP Printing** from the **Catalog** menu.
- 2 Enter your SLIP printing password if necessary. The SLIP Printing Setup [for Patrons' Catalog] window opens.
- 3 From the **SLIP printer** drop-down list, select **StarDP8340 (Receipt)** as your printer.
- 4 In the **Number of linefeeds before printing starts** box, type 2.
- 5 Click **OK** to save your settings and close the SLIP Printing Setup window.

Examples of SLIP printouts

To print slips, you need to purchase the Spectrum SLIP add-on program for Spectrum. For details, contact Sagebrush Corporation's Sales Department at 1-800-533-5430.

You can generate a variety of printouts with the SLIP printer. Your printouts may appear somewhat different depending on the options you select.

Each circulation receipt includes the name and patron number of the patron checking out and the date and time of the transaction. Other information may appear depending on how you set up your SLIP checkout options.

The fine receipt and fine notice show the name and patron number of the patron checking out and the date and time of the transaction. The fine receipt may contain each material and its paid fine amount, the total amount paid, and the total fines still due if you choose to include those options when you set up your fine receipt options in SLIP Setup. The program subtracts the amount collected from the first material on the list, and so on down the list, depending on how much was collected.

Note: Spectrum doesn't print a SLIP receipt after you negotiate or add a fine, only when you collect all or part of a fine.

SLIP—circulation receipt example

To print slips, you need to purchase the Spectrum SLIP add-on program for Spectrum CIRC/CAT. For details, contact Sagebrush Corporation's Sales Department at 1-800-533-5430.

Springfield High School 1210 Spruce St. Springfield, MO 65801
Daryn Buchner Patron Number: 100001 Date: 10/12/00 Time: 09:08 AM
Materials being checked out/renewed:
44 Star Wars / Date due: 10/26/00

Other materials currently checked out:
NONE

Materials with fines:
15 Queen Elizabeth I: an illustrated bic Amount due: 2.00 Fine total: 2.00

Ph: 555-635-4827 Fax: 555-635-4828

SLIP—Circulation receipt example

Circulation receipts can only be printed from Spectrum CIRC/CAT (not Patrons' Catalog).

SLIP—fine receipt example

To print slips, you need to purchase the Spectrum SLIP add-on program for Spectrum CIRC/CAT. For details, contact Sagebrush Corporation's Sales Department at 1-800-533-5430.

Springfield High School
1210 Spruce St.
Springfield, MO 65801

Daryn Buchner
Patron Number: 100001
Date: 10/12/00 Time: 09:02 AM

Fines paid:

Transaction code: 52958908
9 Adventures of Huckleberry Finn /
Amount due: 1.00
Amount paid: 1.00

Total amount paid: 1.00

Materials with fines:

15 Queen Elizabeth L an illustrated bio
Amount due: 2.00
39 Minnesota /
Amount due: 1.00

Fine total : 3.00

Ph: 555-635-4827
Fax: 555-635-4828

SLIP—Fine receipt example

Fine receipts can only be printed from Spectrum CIRC/CAT (not Patrons' Catalog).

SLIP—fine notice example

To print slips, you need to purchase the Spectrum SLIP add-on program for Spectrum CIRC/CAT. For details, contact Sagebrush Corporation's Sales Department at 1-800-533-5430.

Springfield High School 1210 Spruce St. Springfield, MO 65801
Daryn Buchner Patron Number: 100001 Date: 10/12/00 Time: 09:02 AM
Materials with fines:
15 Queen Elizabeth I: an illustrated bio Amount due: 2.00
39 Minnesota / Amount due: 1.00
Fine total: 3.00

Projected fines:
NONE

Ph:555-635-4827 Fax:555-635-4828

SLIP—Fine notice example

Fine notices can only be printed from Spectrum CIRC/CAT (not Patrons' Catalog).

SLIP-bibliography example

To print slips, you need to purchase the Spectrum SLIP add-on program for Spectrum CIRC/CAT. For details, contact Sagebrush Corporation's Sales Department at 1-800-533-5430.

Bibliography Listing
"central"

Printed for: Daryn Buchner
Thursday, October 12, 2000

917.28 Car
58 Out
Carpenter, Allan and Baker, Eloise.
El Salvador. Chicago: Childrens Press,
[1971].

Note: Introduces the land, history, economy,
culture, and people of the Central
American republic whose name
means "The Savior".

917.28 Car
66 In
Carpenter, Allan. Costa Rica. Chicago:
Childrens Press, [1971].

Note: An introduction to the geography,
history, people, government, culture,
resources, industries, and tourist
attractions of the Central American
country that boasts of saluting United
States Presidents with volcanic
eruptions.

SLIP—Bibliography example

Bibliographies can be printed from both Spectrum CIRC/CAT and Patrons' Catalog.

