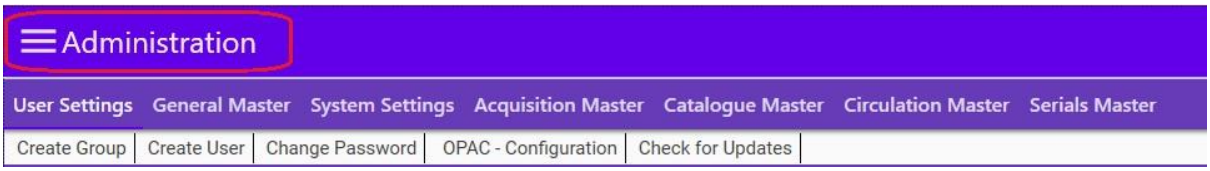
SOUL 3.0: Administration Module

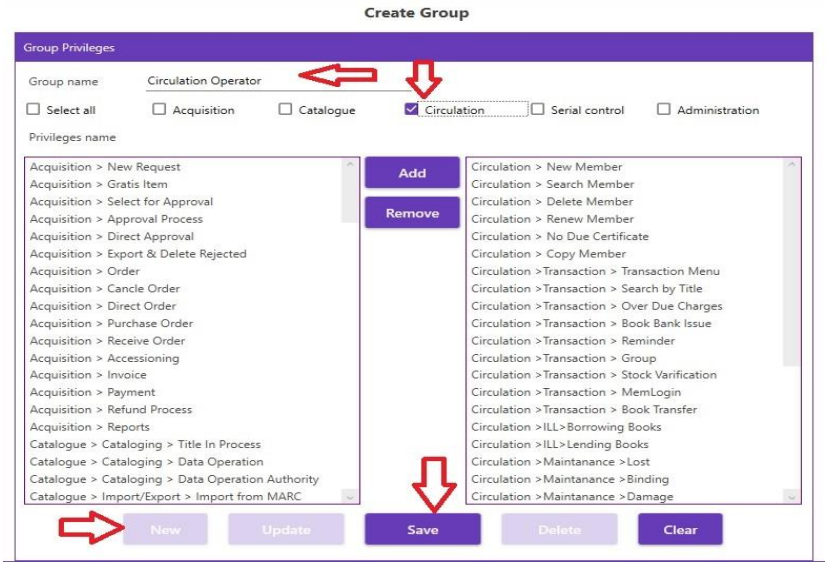
Username: superuser
Password: su

Set rules and feed standard information needed for our LMS. Select Administration from the menu which, in turn, provides following options:



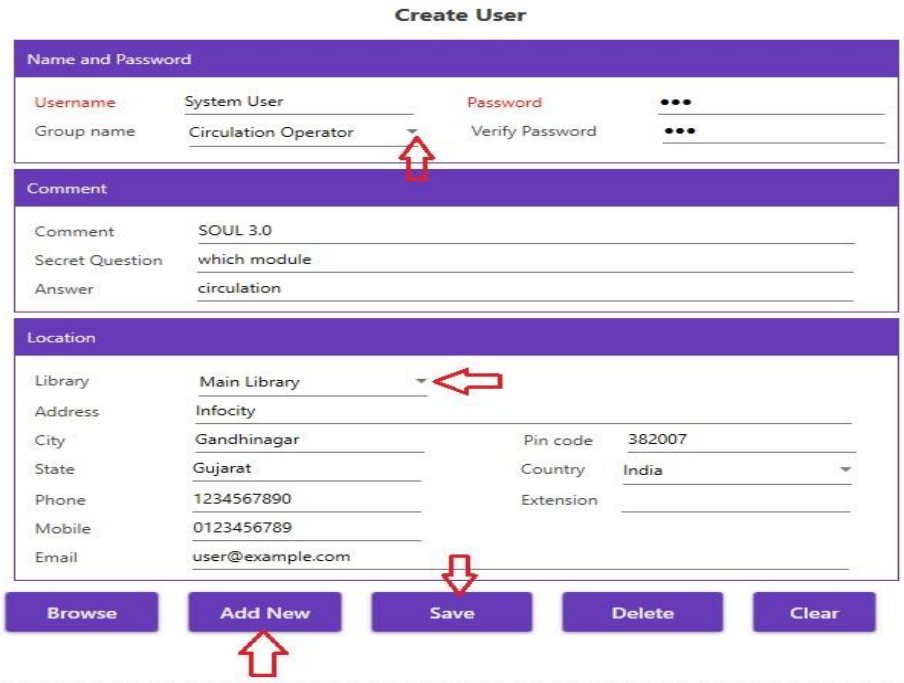
Administration→ User Settings:

User Settings → Create Group:



Click on New button -> Assign Group Name -> Select individual module from check box or sub module from the list below -> Save. Here, you have an option to add/remove individual privileges from the group.

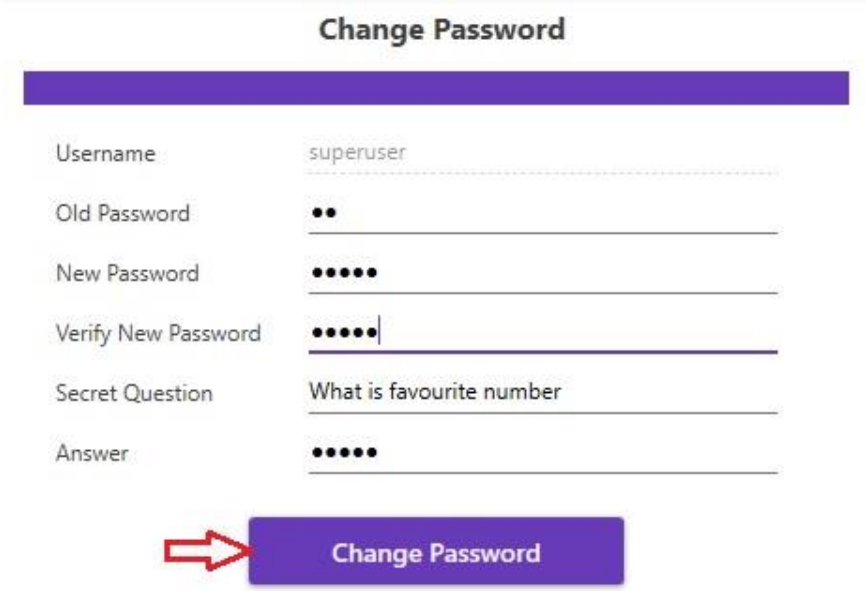
User Settings → Create User:



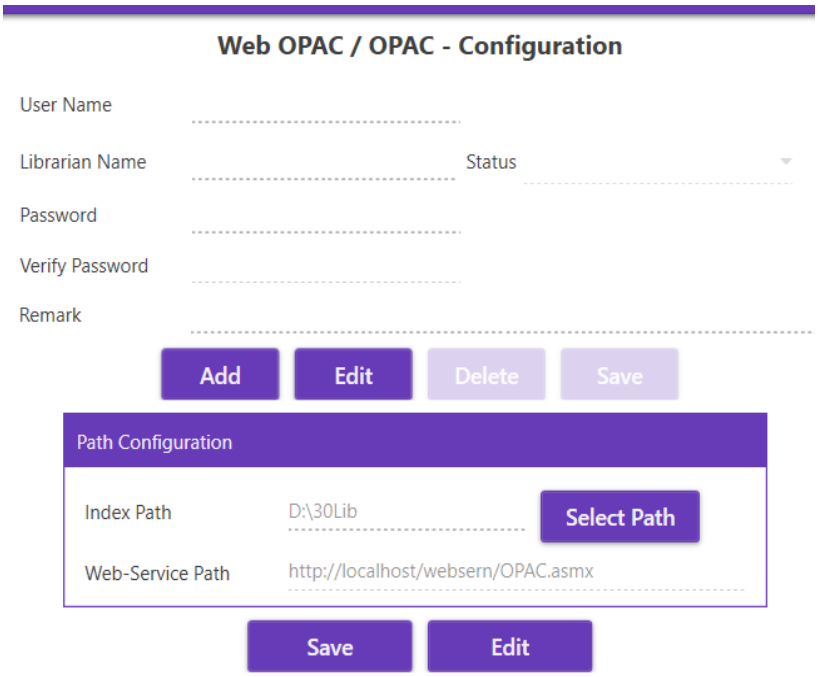
Click on Add New button -> enter username -> select group name from drop down list -> assign password -> enter comment, secret question and answer -> add the necessary location information and click on "Save" to create user.

User Settings → Change Password:

Password for each user or a group can be changed through this option. Password change is allowed only when old password is entered and secret question is answered correctly. It is also being requested to change "Superuser" password by change password option in below screen.



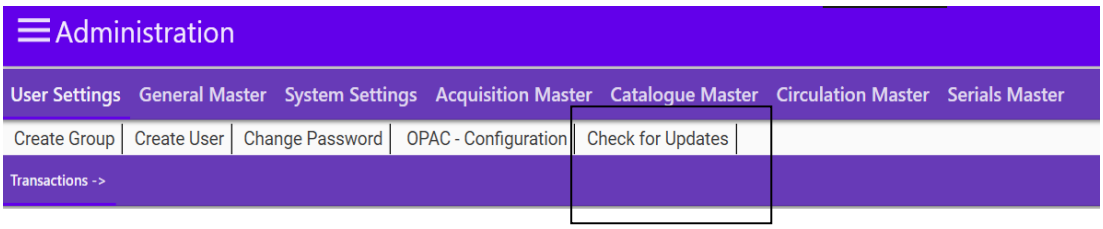
User Settings → OPAC - Configuration:



- Using this option, admin user of web opac can be created who can use import the members self-registered on web opac portal.
- In case of Index path/web service path is getting changed, you may change using this option.

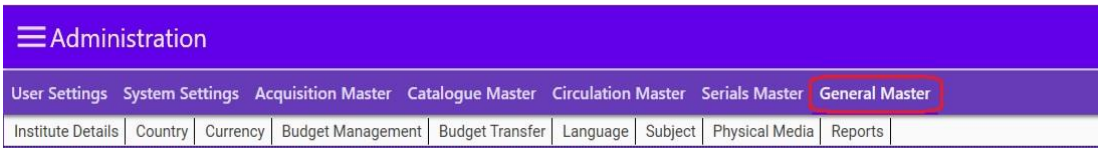
NOTE: If you are not aware about this functionality, please do not try to change as it may create problems with functionalities. It should be done by Administrator/Superuser.

User Settings → Check for updates:



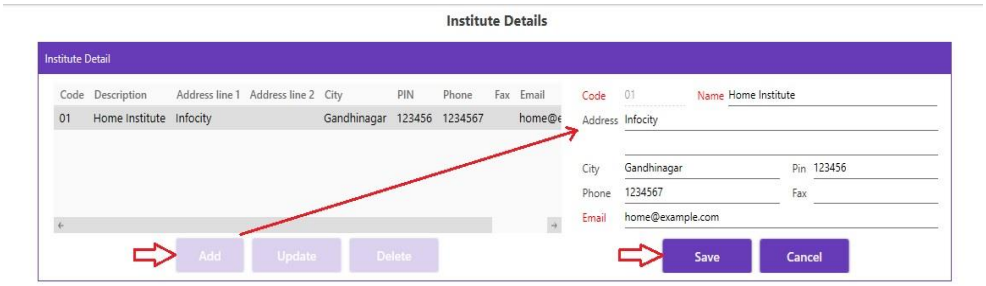
- If software update is available then using this function you can update the software by single click

Administration → General Master:



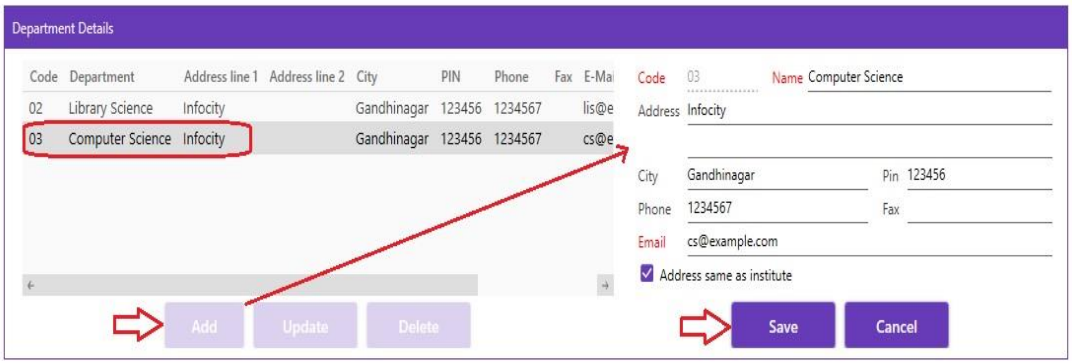
General Master → Institute Details:

To add the institute details;
Click "Add" button -> fill in the code and institute details-> Save



To add the department details;

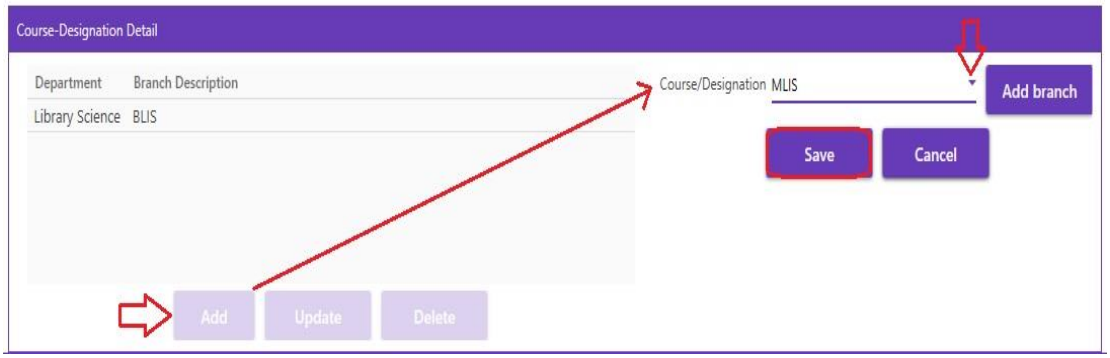
First select the institute name -> Click "Add" button from department details window -> To the right side fill in the code and department name -> Tick mark the check box to copy address same as institute-> add email -> "Save".
Continue the same flow to add any number of departments.



To add Course/Designation

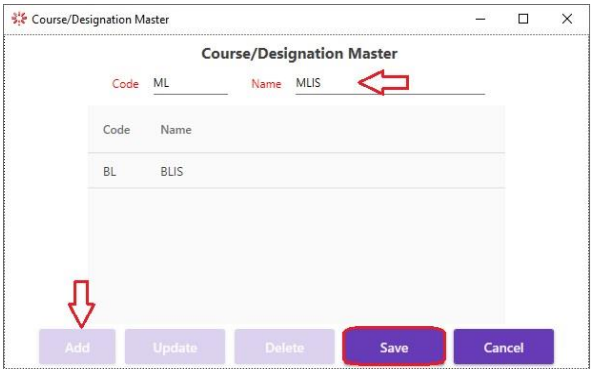
First select the Department from Department details window ->
Click "Add" button from Course/Designation details window -> To the right side select Course/Designation from the drop-down list -> Save.

If the required course/designation is not available under chosen department please add it by clicking 'Add Branch" button.

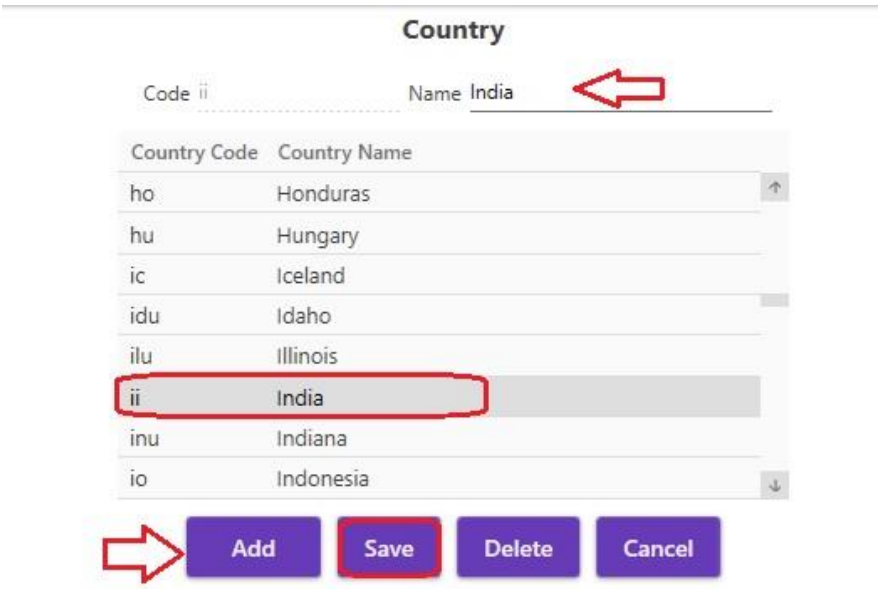


Course/Designation Master;

Add Branch → Add → Code → Name → Save.

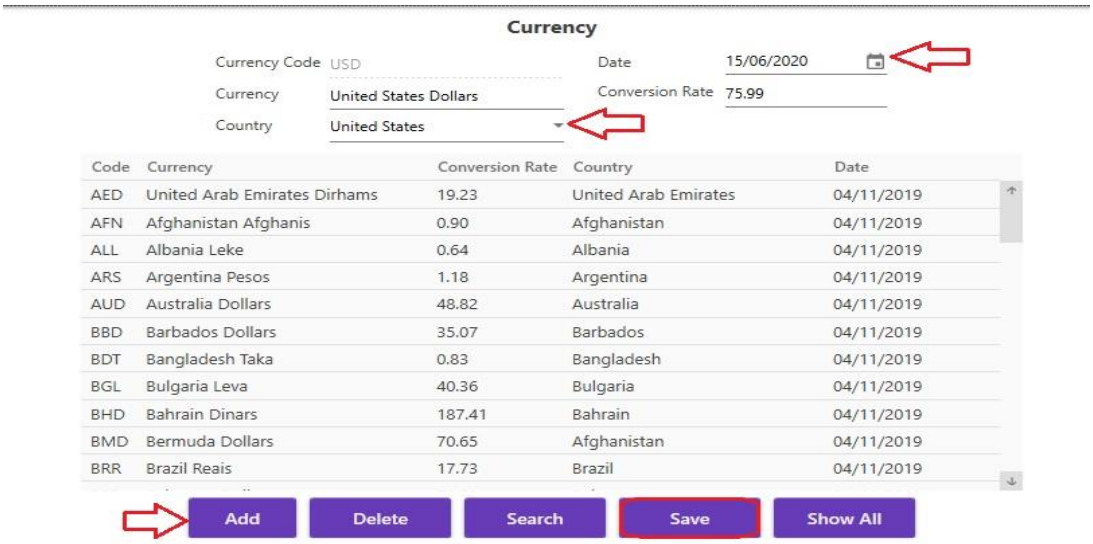


General Master → Country:



Country → Add → Code → Name → Save.

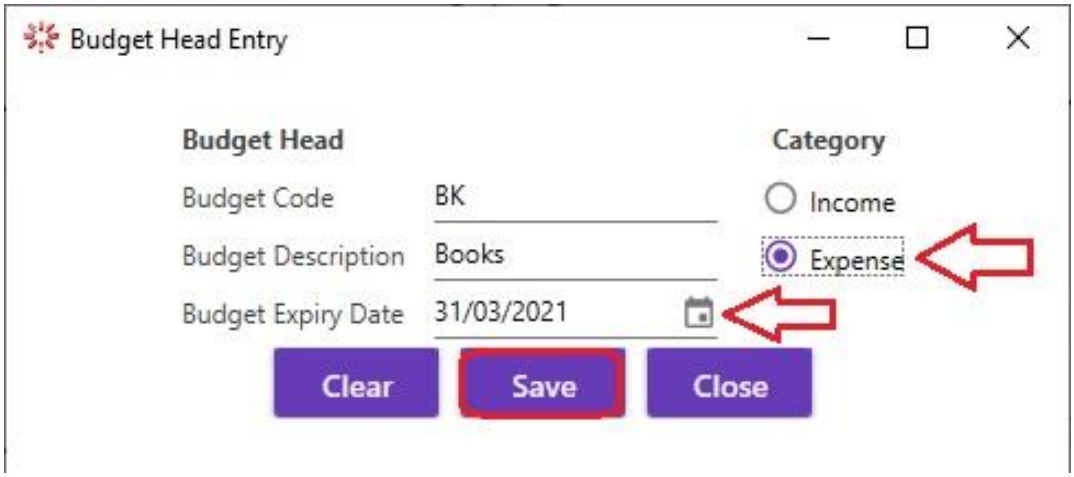
General Master → Currency:



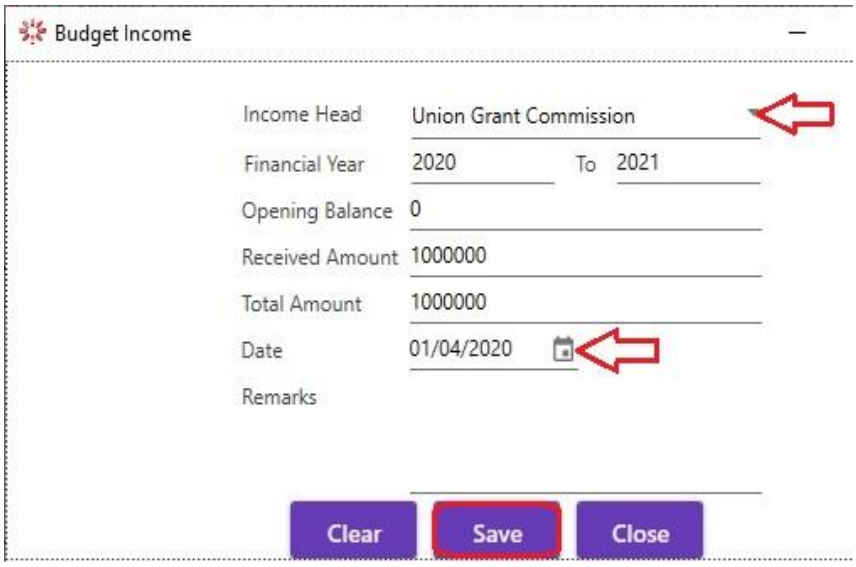
Add: Select Currency -> Enter Currency Code -> Currency -> Country -> Date -> Conversion Rate –> and 'Save'. If Code/Country it will allow you to add the new currency with requisite details.

Modify: Double click on the first column of the currency you wish to modify edit details and click 'Save'.
Delete: To delete any record, double click on first column, select the currency you wish to delete. 'Delete' button will get activated. Click it to delete the desired currency permanently from the database.

General Master → Budget Management:



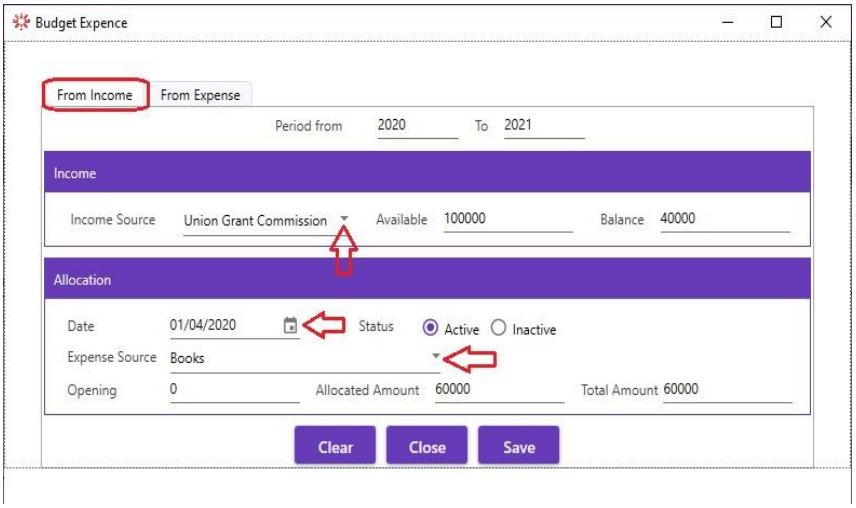
To Create new Income/Expenditure Head, select 'Budget' - > On left side box of Budget Process screen click <Add>, Enter 'Code' and 'Heading' for Income/Expenditure as needed.



To receive/add amount in Income Head.

First select Income from right side window-> Add button below -> select Income Head from dropdown -> Give financial year -> opening balance will be carried forward from previous year closing / pending balance of the same Income head (You can make it zero if you don't want to carry forward it) -> Fill in the received amount-> Date and remarks.

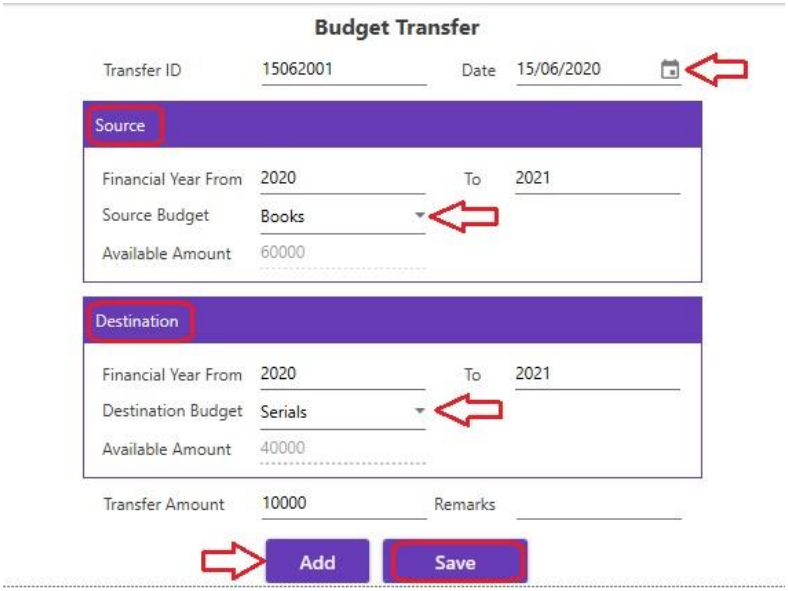
To allocate amount in Expenditure Head.



First select Expenditure from right side window -> Add button below -> From Income/From Expense -> Fill in Period from and To -> Select Income Source/Expense Source from dropdown menu -> Select Expense Source from dropdown menu -> Fill in Allocated Amount -> Save. In Expense allocation also it will give previous year closing/pending balance of the same Expense head. You may carry forward it or make it zero as per the requirement.

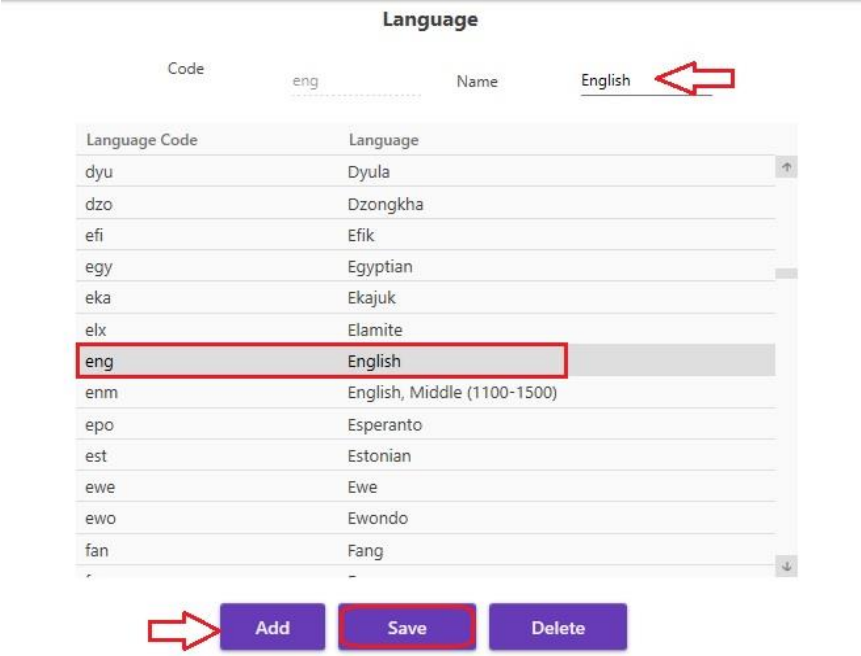
The same way you may allocate the amount from one Expense head to another Expense head.

General Master →Budget Transfer:



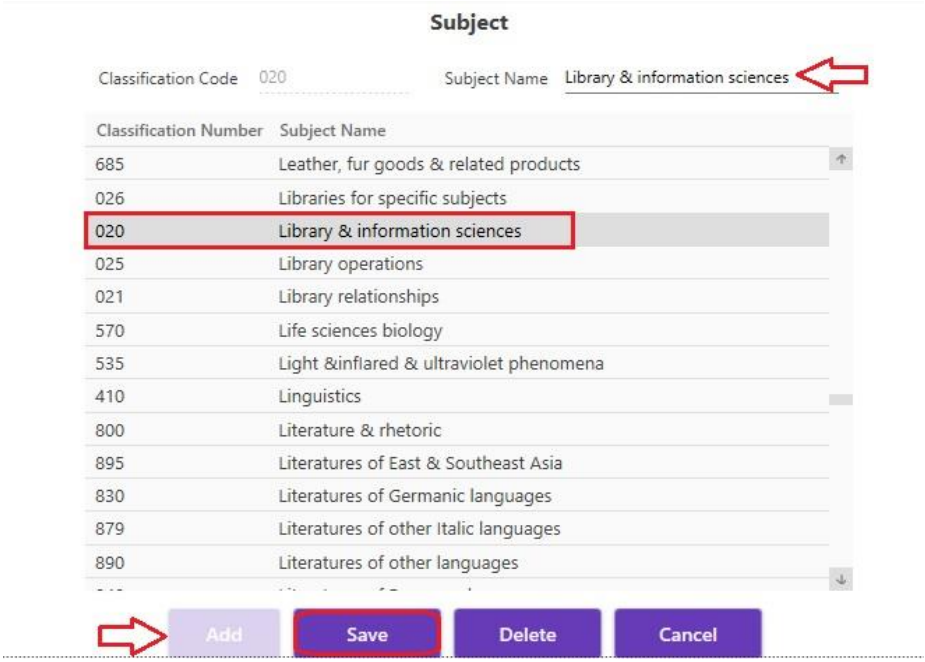
To transfer/reallocate amounts from one Income/Expense Head to another;
Specify Financial Year of the Source Budget Head → Select Source Budget Head from drop-down Menu → Available amount will automatically appear → Specify amount needed to be transferred → Feed authorisation information in 'Remark' → Choose Financial Year of the Destination Budget Head → Select Destination Budget Head from drop-down Menu → Save the record 'Budget updated message will appear.

General Master → Language:



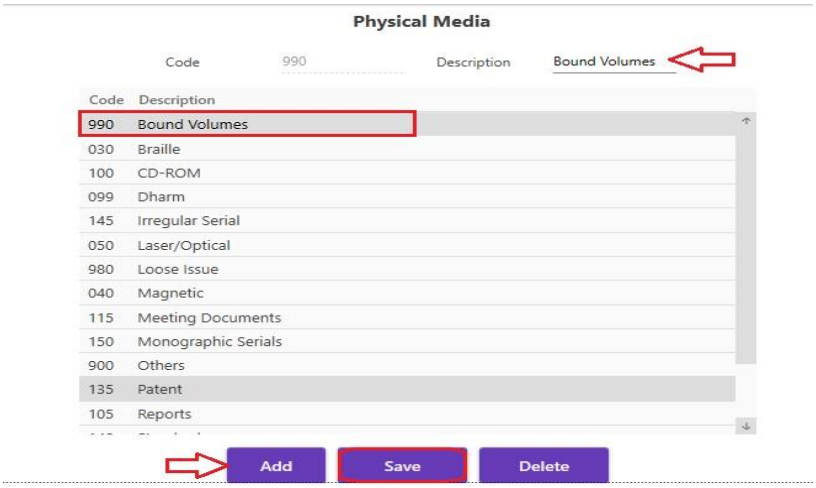
Language → Add button → Assign Code → Name → Save.

General Master → Subject:



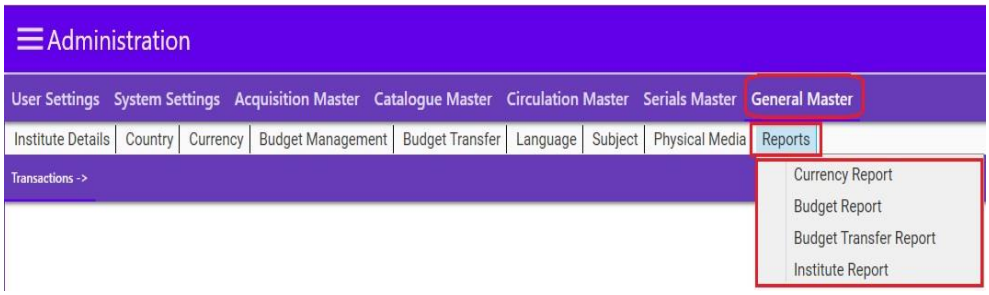
Subject → Add button → Classification Code → Subject Name → Save.

General Master → Physical Media:



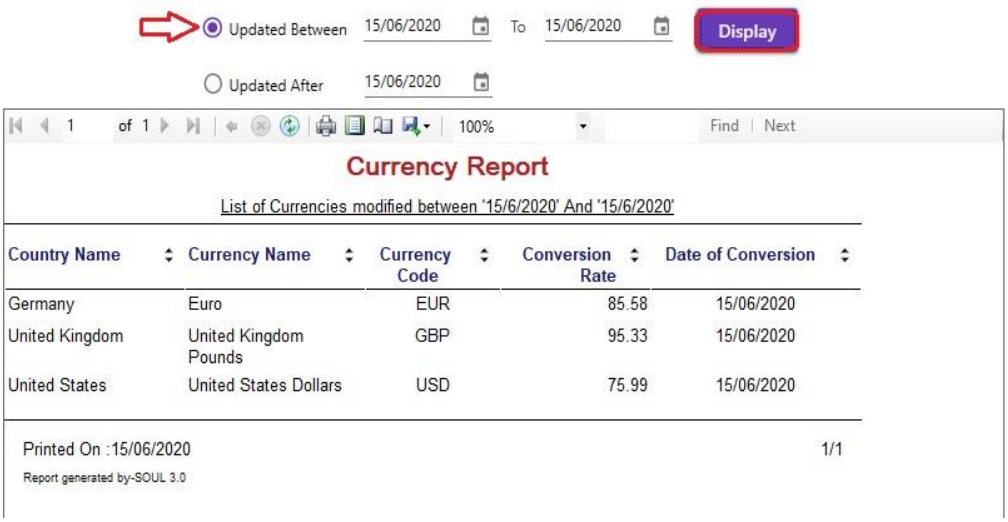
Physical Media → Add button → Assign Code → Description → Save.

General Master → Report:



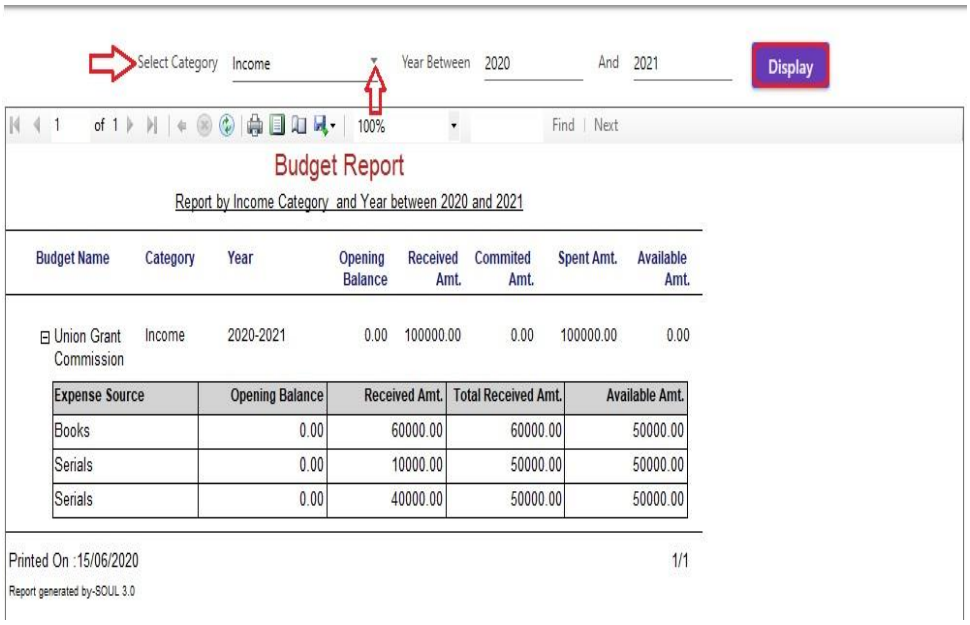
Currency Report:

You can see the display of all entered currency, their codes and conversion rates.



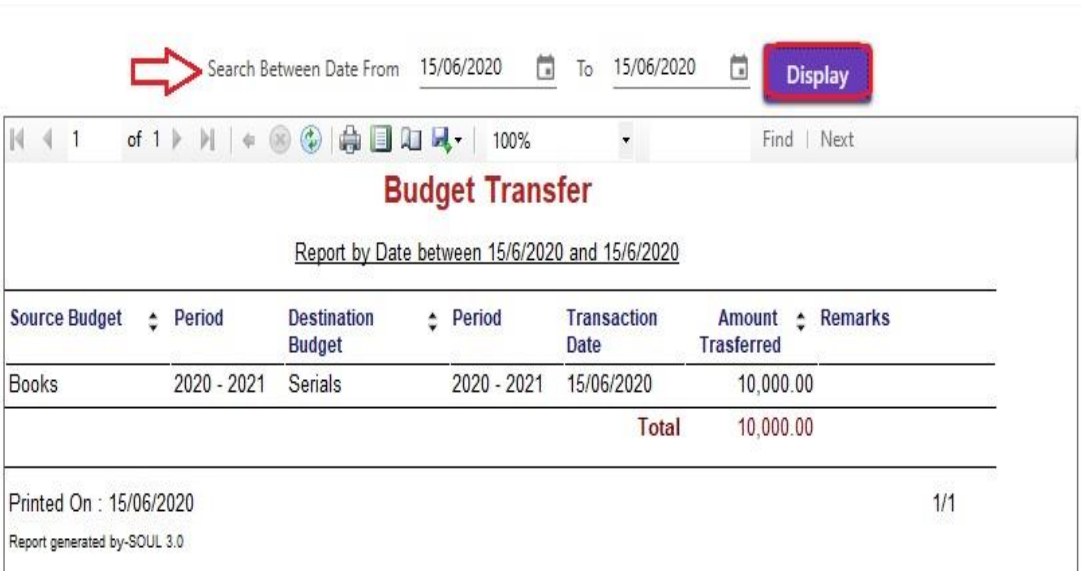
Budget Report:

You can see the current status of each budget head. The report can be generated by using Income-Head and Expense-Head and the sub-report will give you the Income / Expense head relationship with the amount allocated in each as well as the committed and spent amount during order and invoice process.



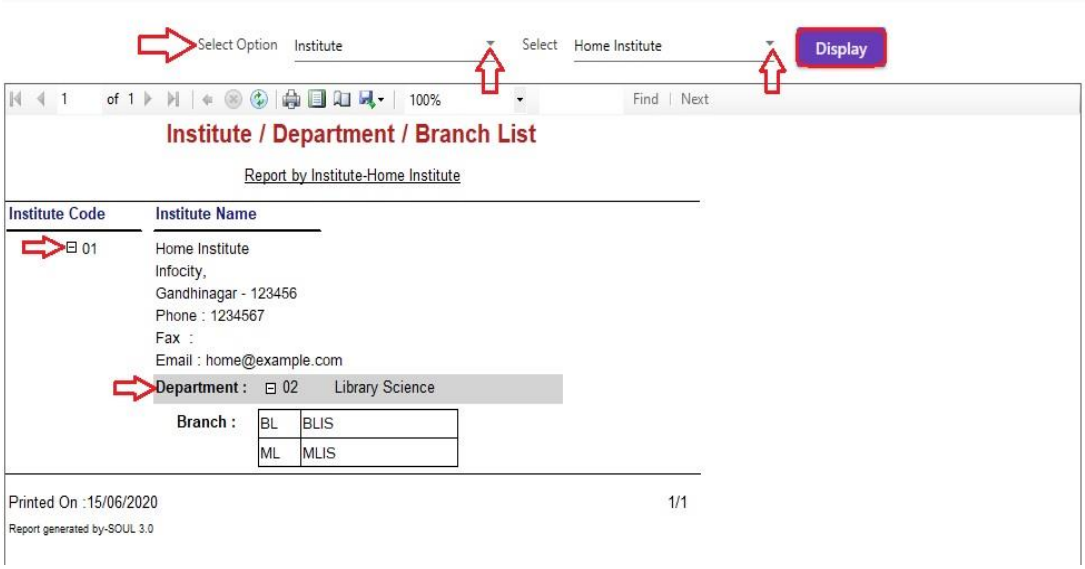
Budget Transfer Report:

You can list all budget transfer operations carried out between specific periods.

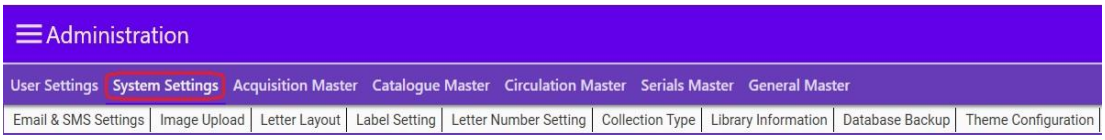


Institute Report:

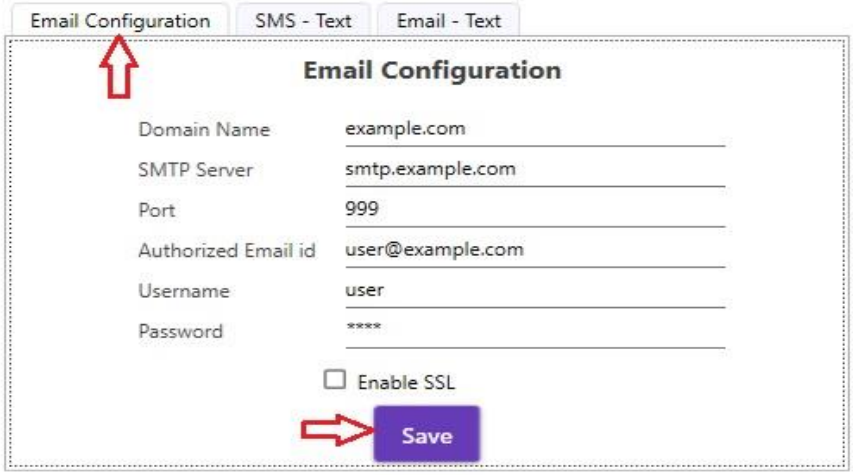
You can see hierarchical list of Institutes, Departments and Branch within each institute.



Administration → System Settings:

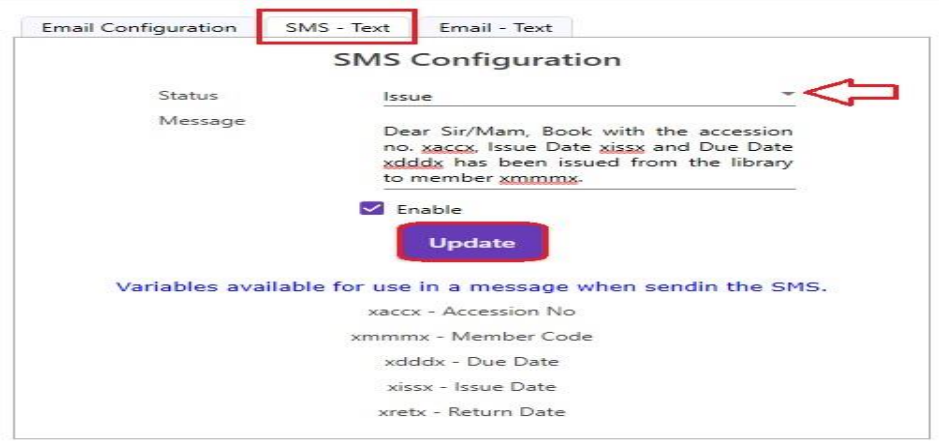


System Settings→ Email & SMS Settings:



If user wants to send SMSs for circulation transactions such as issue, return, reminder and overdue charges then he/she needs set the template and tick the "Enable" checkbox as shown in image below. This will send SMS to the member of the library.

Note: SMS Server should be running to send SMSs.



System Settings→Image Upload:

First select image name -> Select Image -> Upload Image.

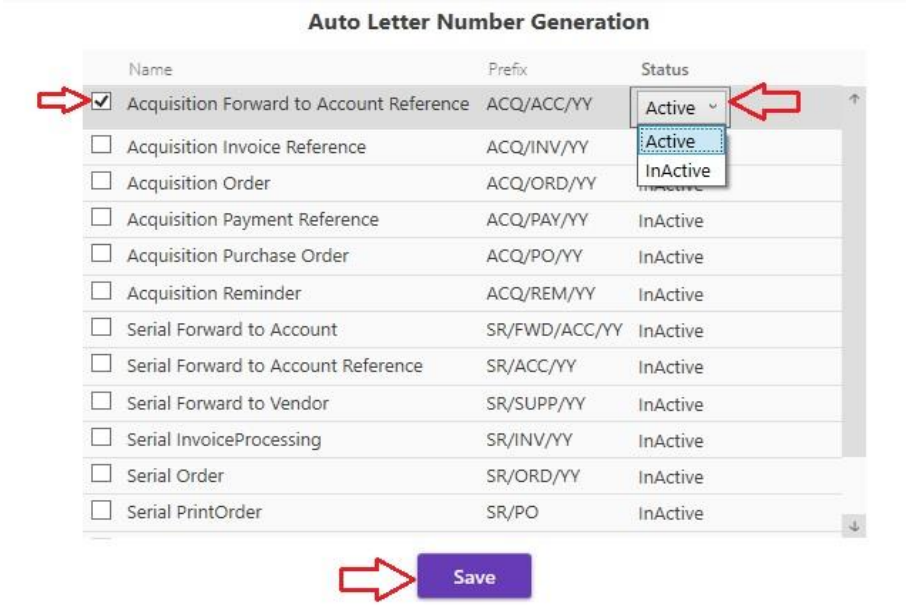
System Settings→Letter Layout:

You can select the Letter name from the dropdown and edit the text as required and save it.

System Settings→Label Setting:

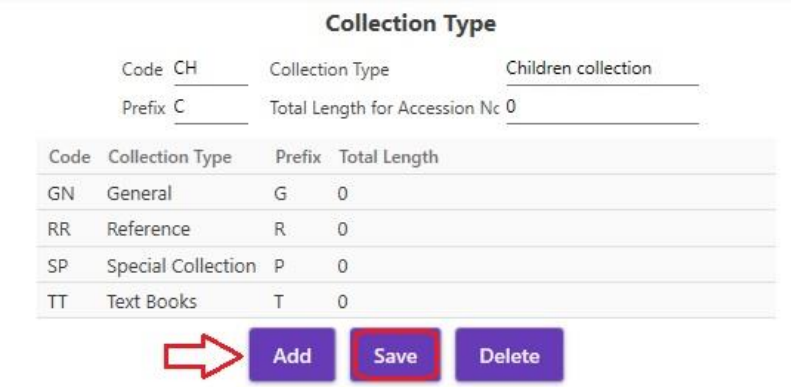
Add->Select Label Name->Define the stationary measurement->Save.

System Settings→Letter Number Setting:



Select the name->Edit Prefix->Change status->Save

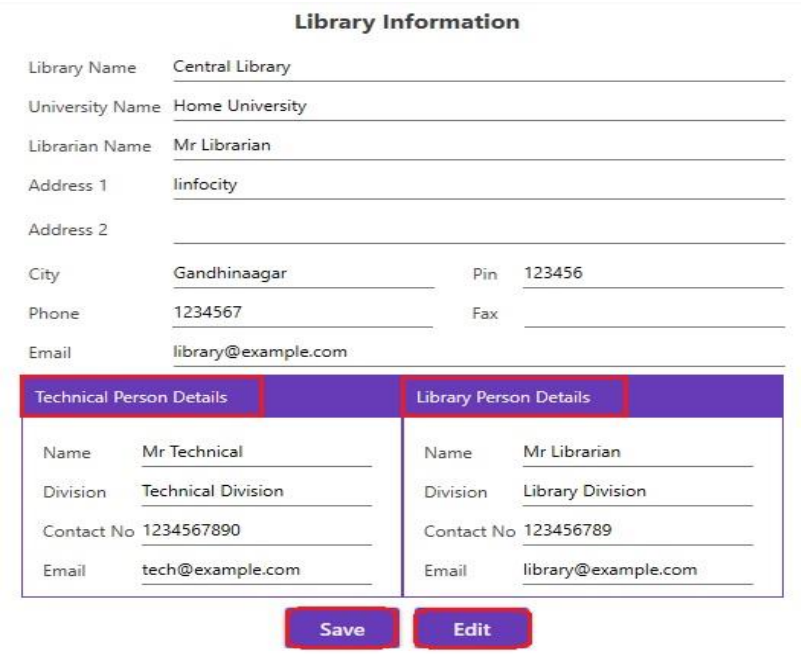
System Settings→Collection Type:



First click on Add button -> Assign code -> Mention Collection Type -> Prefix -> Total Length for Accession No and click on "Save".

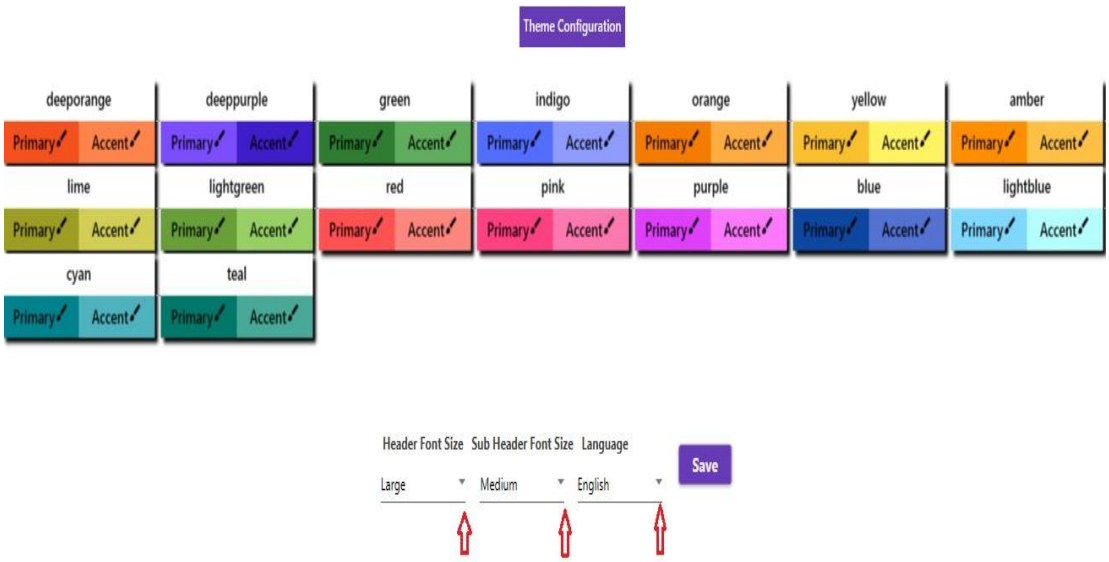
System Settings→Library Information:

Here, you have the provision to furnish the details of your Library, which once saved (while initial setup) will not allow editing later. Also, you have to fill about the library person, the staff who is working on the modules and the details of the technical person, which can be updated as and when required.

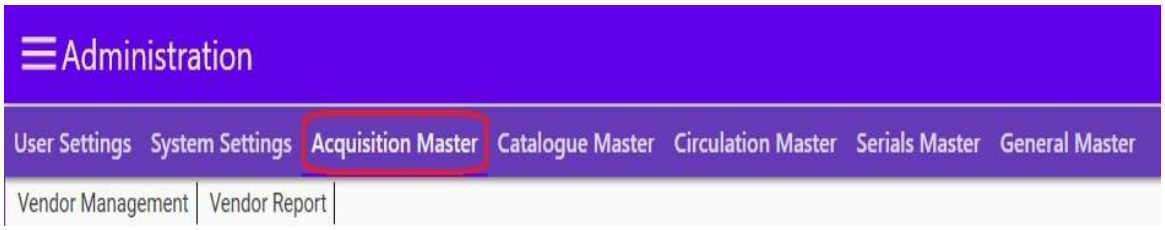


System Settings→Theme Configuration:

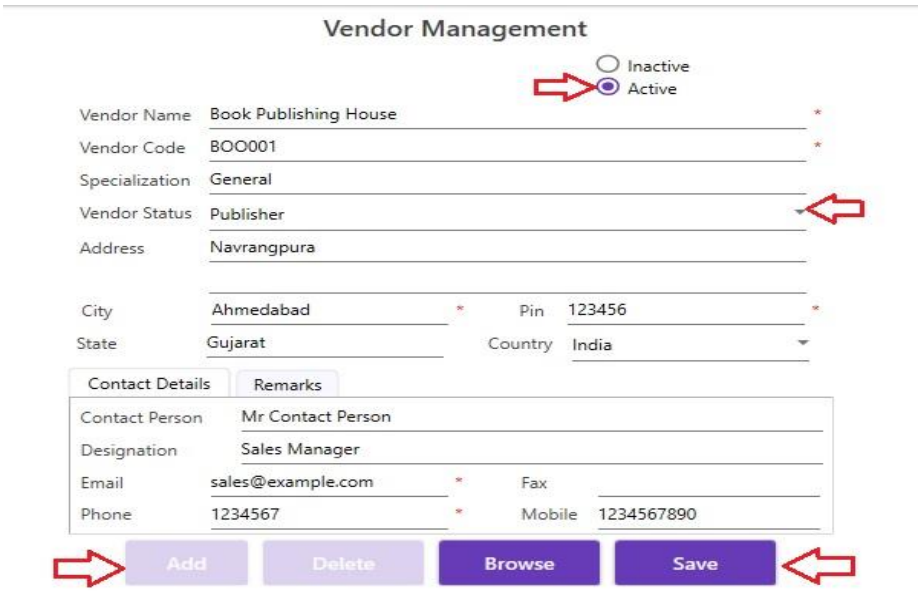
- There is provision to change the colour theme, Header font size, Sub Header font size and Language of the modules and sub modules. User can set their own colour theme, language etc for his/her own profile.



Acquisition Master:



Acquisition Master→ Vendor Management:

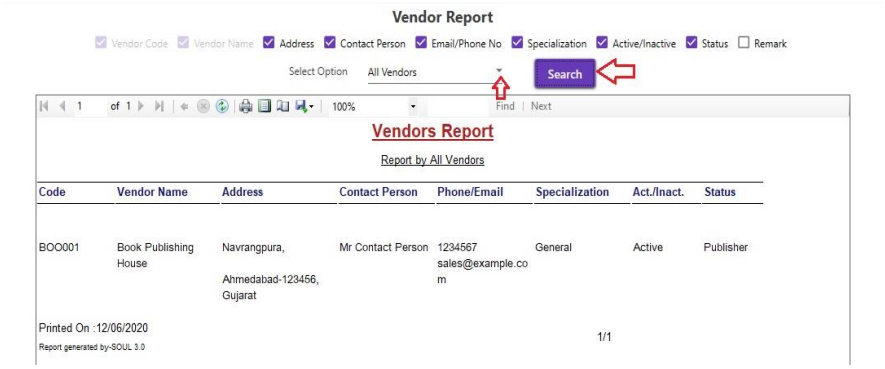


Click on Add button → Status as Active → Vendor name → Specialization → Vendor Status from dropdown → Address → City → Pin Code → State → Country → Contact Details → Save.

Edit Vendor Details or Delete Records:

Click on Browse button → Double click on Vendor → Modify/Delete Record → Save.

Vendor Management → Vendor Report.



Vendor Report → Tick the appropriate box → Select option from dropdown → Search.

Administration → Catalogue Master:

SOUL uses the MARC format. Catalogue Administration needs knowledge of MARC standard and a bit of understanding how records are identified when they are searched for any purpose. Please refer to Appendix on MARC for understanding its mechanism.

Please DO NOT make any changes in the templates or values against any field, unless you are confident of the changes you are making. Please ensure you are familiar with the values against each tag in these templates.

Catalogue Master → Leader:

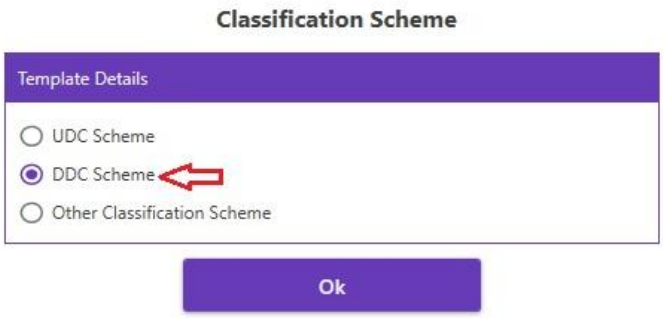
MARC records can be distinguished for various types of material by the specific codes used in Leader/06 (Type of Record). The leader of a MARC record identifies number of bibliographic record types.

Catalogue Master → Fixed Field:

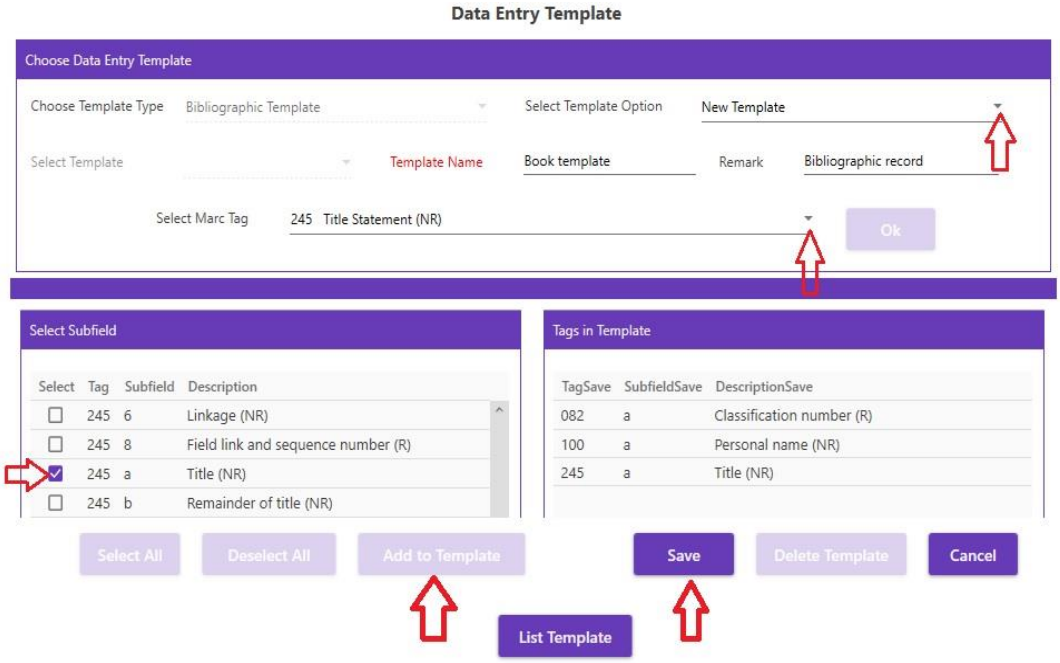
A MARC record has one Fixed Field composed of the 008 field and Leader information. Mnemonic labels identify elements that contain coded information describing the item and the record itself. We can create standard format for Fixed Field for Books /Theses, Serials and Authority. At the time of data, if we need to change any of the elements of this template, you can do so by choosing 'Modify' option.

Catalogue Master → Classification Scheme:

You can set default Classification Scheme for your library records using this option.



Catalogue Master → Data Entry Template:

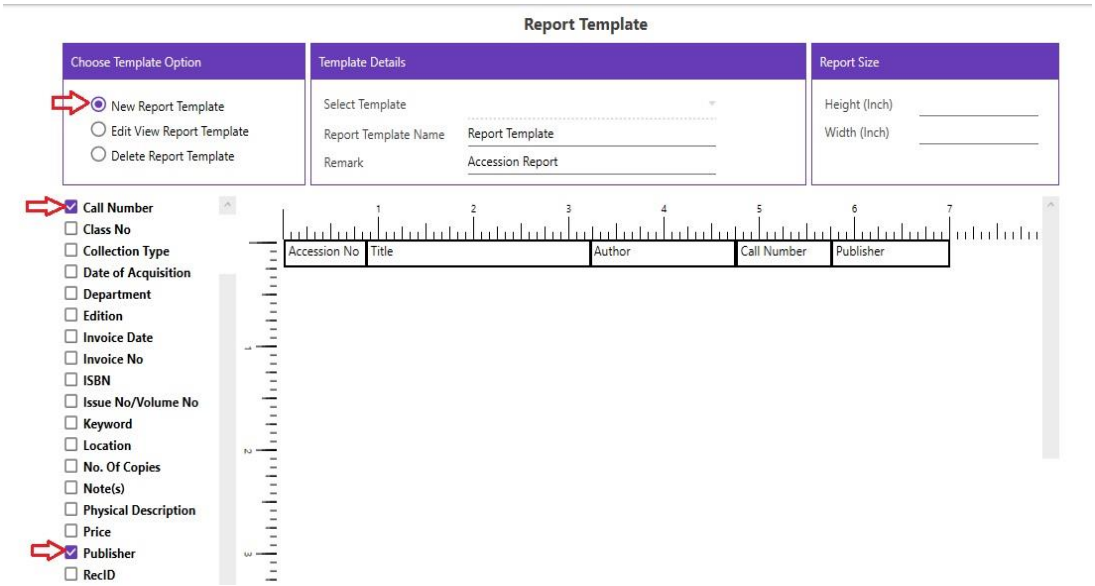


To create new template, use the following steps;

- First "Choose template type" you want to create (i.e. Bibliographic or Authority);
- Then select "Template Option" Which enables you to choose any of the four options, i.e. New Template, Template Based on Existing, Edit Template and Delete Template;
- In case of "New Template" enter template name, or else choose existing template you want to edit/delete or create a copy;
- Now choose corresponding MARC tag (you can search by tag/description of tag) and press OK button, on left hand side you will have selection options for "Subfields" in your chosen tag, select/deselect the subfields as per your requirement, and then click add to template;
- Similarly do this operation for all the tags and corresponding subfields to create your own template.

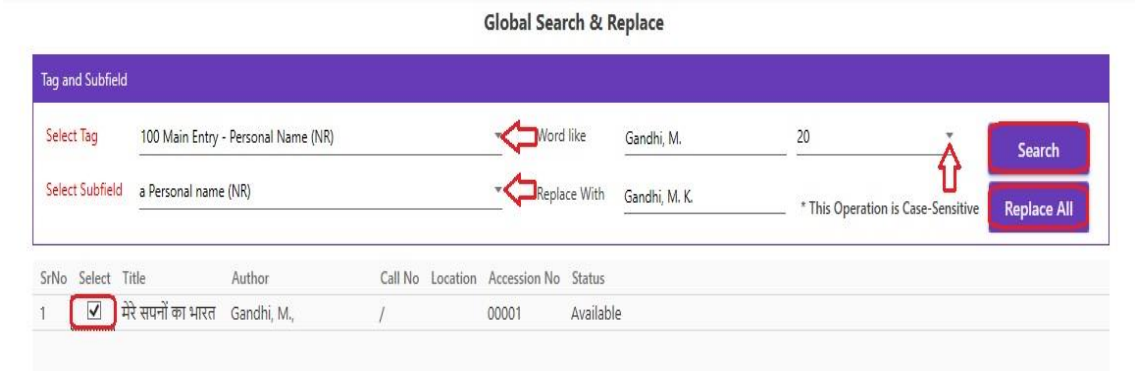
List of available templates can be seen by pressing "List Template" button.

Catalogue Master → Report Template:



- Choose "New Template", "Edit/View Template" or "Delete Template" → Enter template name and remark fields and select the report height and width → Select the fields which you want to display from the left side list box and it will show in the report layout area → Resize/reposition the selected fields → Page size in inches → Save.

Catalogue Master → Global Search and Replace:



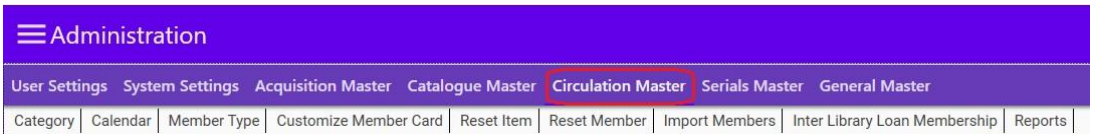
- First select tag, the field name followed by subfield from the dropdown menu. You have an option to search Tag/Subfield by Tag or words in Description of Tag in the drop-down.
- Then go for search, select individual records in which replacement is required & then click on "Replace All".

Delete Bibliography

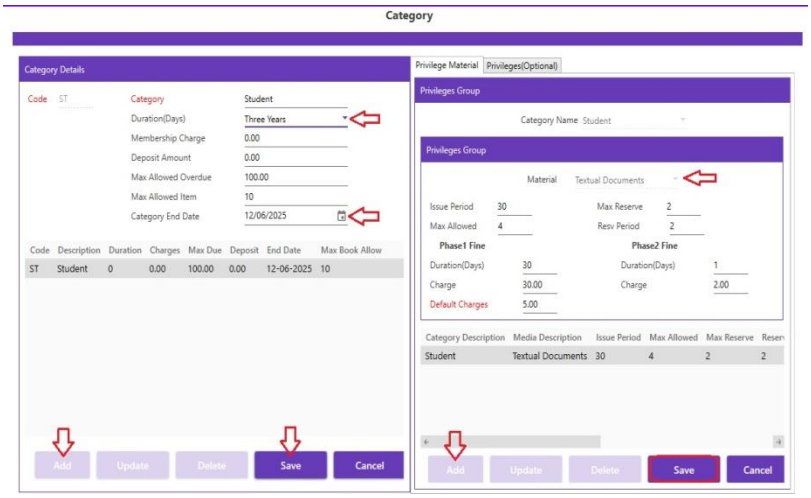
This option can be used when you are sure that certain records need deletion rather than corrections.

Enter Record number from and To → Delete Record.

Administration → Circulation Master:



Circulation Master → Category:

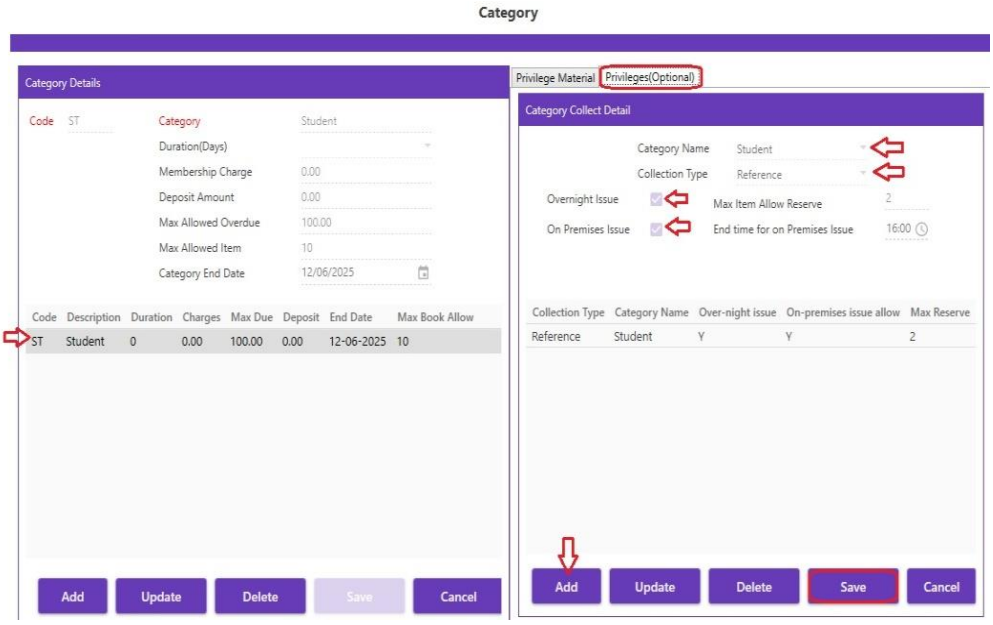


First add code -> category name-> select duration from dropdown menu -> add membership charges, deposit amount, maximum allowed overdue charges, maximum allowed items and category end date and save the category details.

To define the privilege based on material:

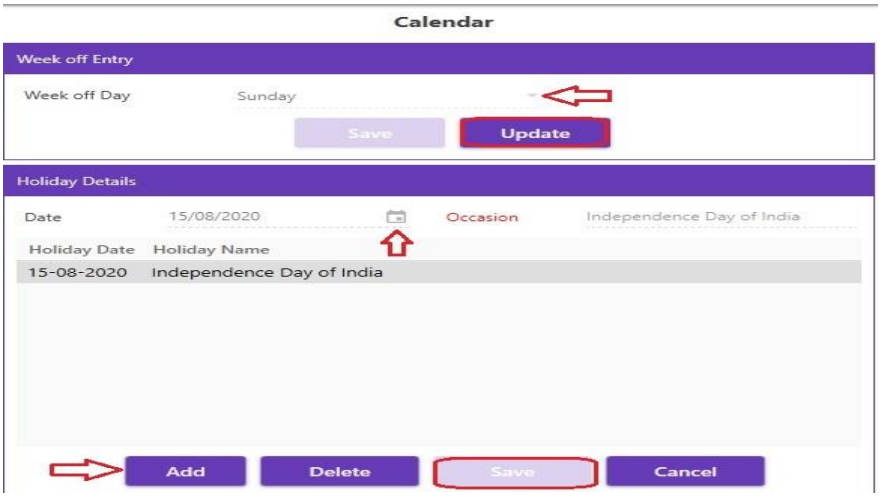
- Add button and select "Privilege Material" from top -> select the type of material from dropdown menu -> add Issue period, maximum number of allowed items, maximum number of reserve items, reserve period, phase 1 fine, number of days and fine amount, phase 2 fine, number of days and fine amount and default charges -> Save.

To define the privilege based on collection type:



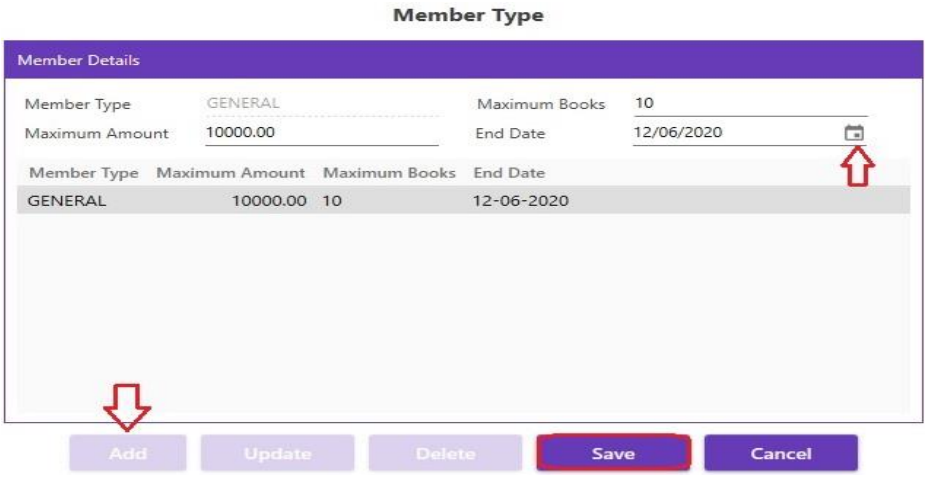
First select "Privileges (Optional)" tab from top -> select category name and collection type from dropdown menu. Select (checkbox) "Overnight Issue" and "On Premises Issue" and add maximum number of items allowed to reserve and also define the end time for on premises issue -> save. You can edit the aforesaid information through Update button.

Circulation Master → Calendar:



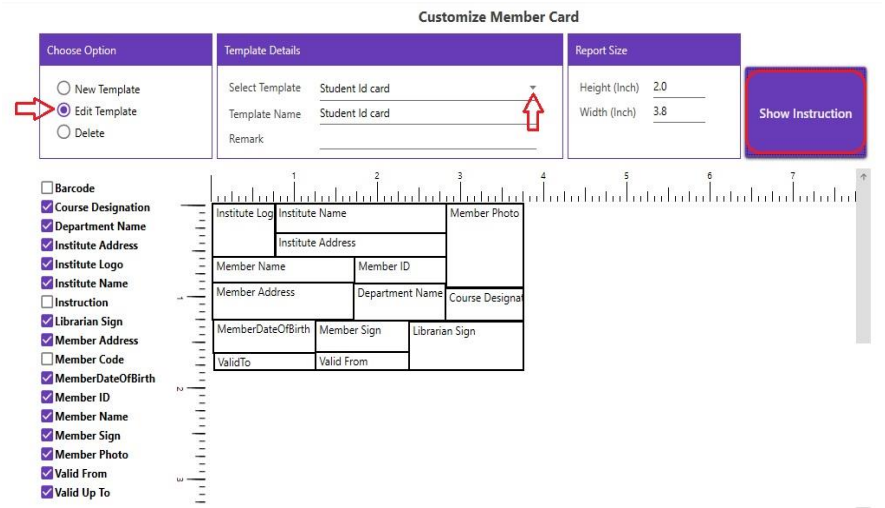
First click on Update button and select weekly-off day from the dropdown menu. Click on Add button to define holiday date, occasion name and Save it.

Circulation Master → Member Type:



Member Type → Click on Add button → Add Member Type → Maximum Books → Maximum Amount → End Date → Save.

Circulation Master → Customize Member Card:

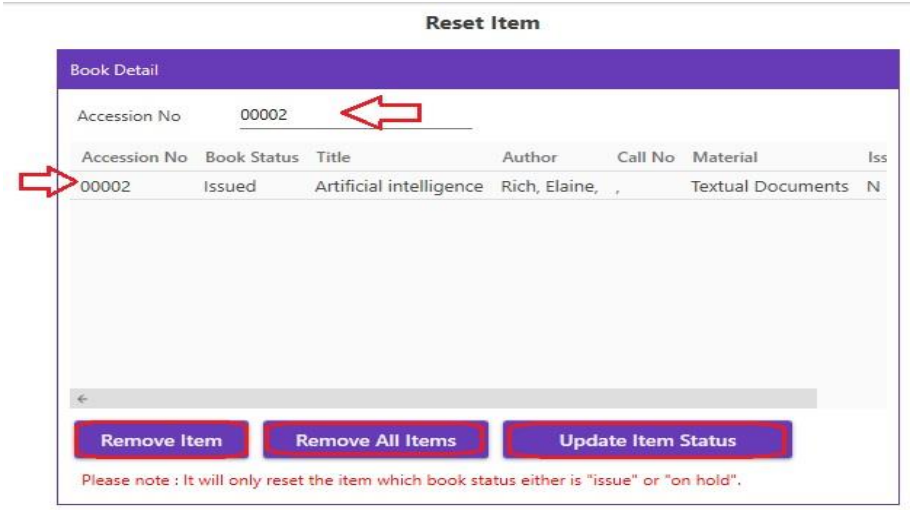


To create template for membership card

- Choose "New Template", "Edit/View Template" or "Delete Template" from template administration option.
- Enter template name and remark fields and mention the report height and width.
- Then select the fields which you want to display on member card from the left side list box and arrange it in the report layout area. You can resize/reposition the selected fields as per your requirement.
- If you want to print the instruction on member card, click on "Add Instructions" and write it in the given panel.

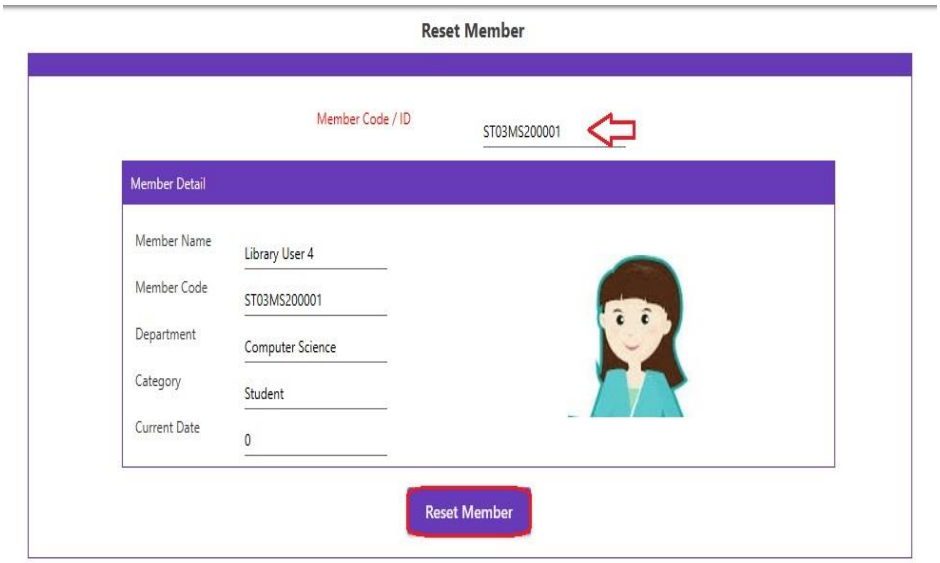
You can check the preview of the template using member card option in circulation module.

Circulation Master → Reset Item:



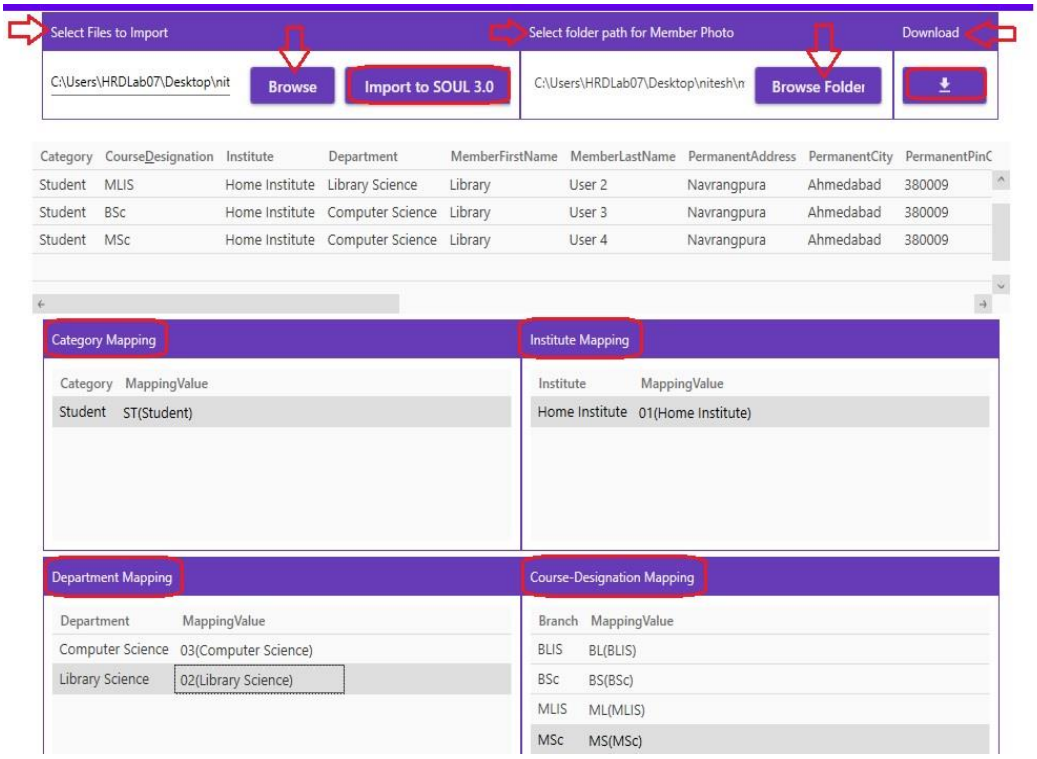
Reset Item → Accession Number → Remove Item/Remove All Items/Update Item Status.

Circulation Master → Reset Member:



Reset Member → Member Code/ID → Reset Member.

Circulation Master → Import Member:

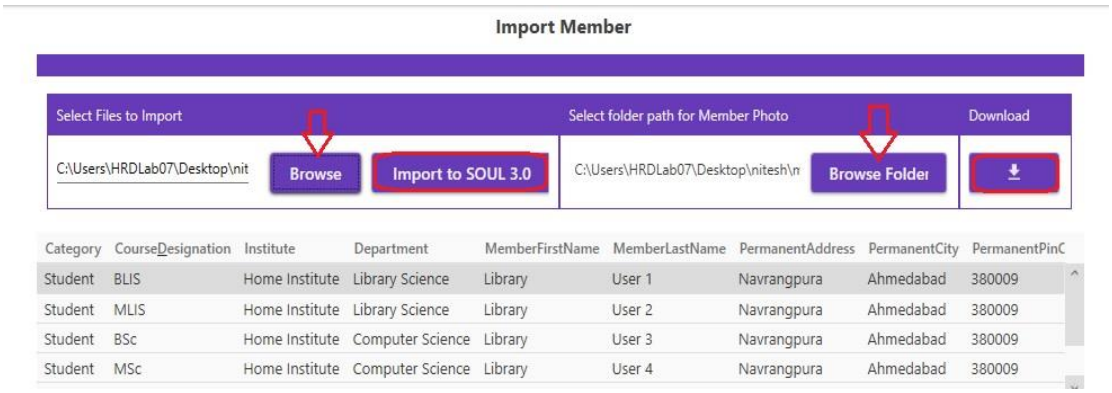


Steps to Import Member Data.

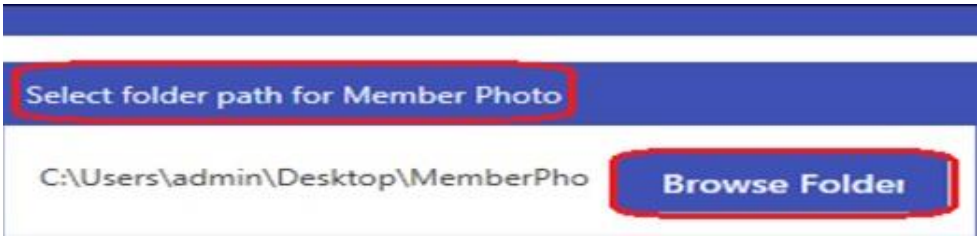
Create Excel Sheet based on the downloaded sample file by clicking download button beside "Browse Folder" button in top right corner. Copy and paste the data in the format available in Microsoft Excel file. Blank fields should be mentioned as 0. Keep Member Code field blank, as the software will generate member code automatically and the field will be available with the generated member code in MS Excel file.

Select Files to Import:

- Select the excel file to import member data in SOUL 3.0 by clicking Browse
- After selection of file, you will be able to see member data in grid below;



Member Photo: Select the location of folder which contains member photo (file name of photo must be Member ID). Now select folder path for member photos.



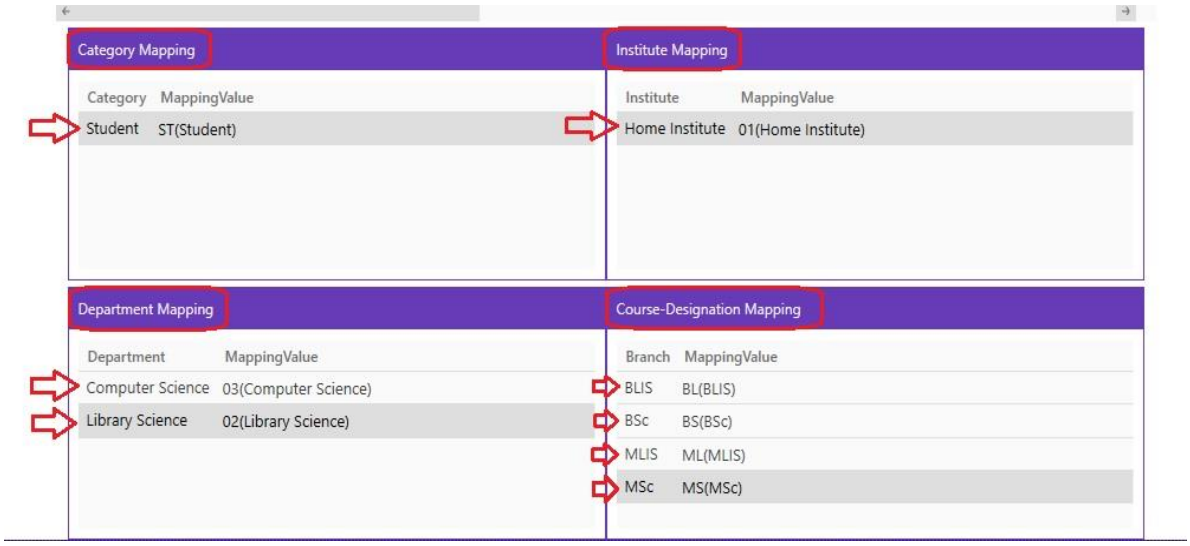
Mapping:

Category Mapping: Map category field with the category available in database from the drop-down list, which is reflected from Circulation Master (Category);

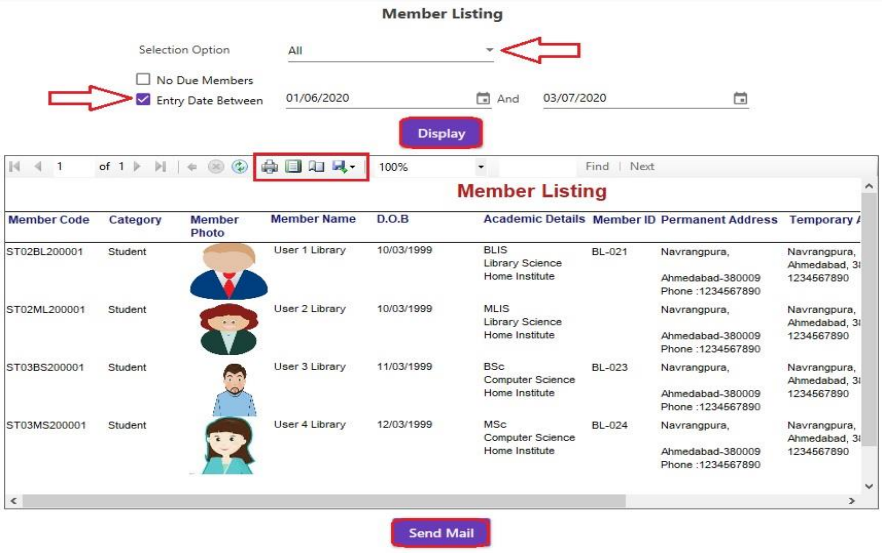
Institute Mapping: Map institute field with the institutes available in database from the drop-down list, which is reflected from General Master (Institute Details);

Department Mapping: Map department field with the department available in database from the drop-down list, which is reflected from General Master (Institute Details);

Course/Designation Mapping: Map branch field with the Course & Designation field available in database from the drop-down list, which is reflected from General Master (Institute Details);

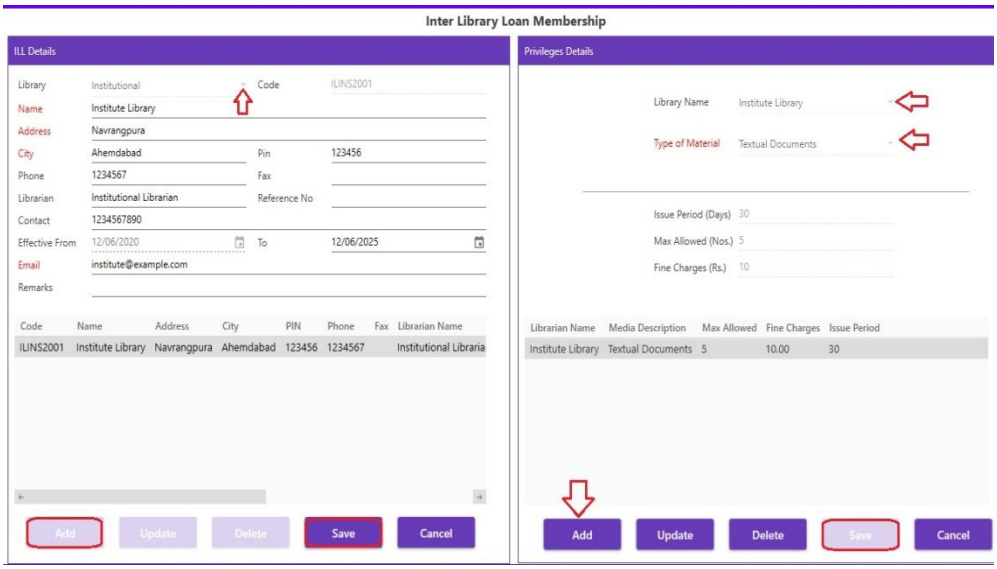


After mapping the values of Category, Institutes, Department and Course & Designation, click 'Import to SOUL 3.0', the message will appear 'Members are imported successfully.
After successfully importing the members, you can see Member Listing report in Circulation reports.



Circulation Master → Inter Library Loan:

Inter Library Loan → Institutional Membership:

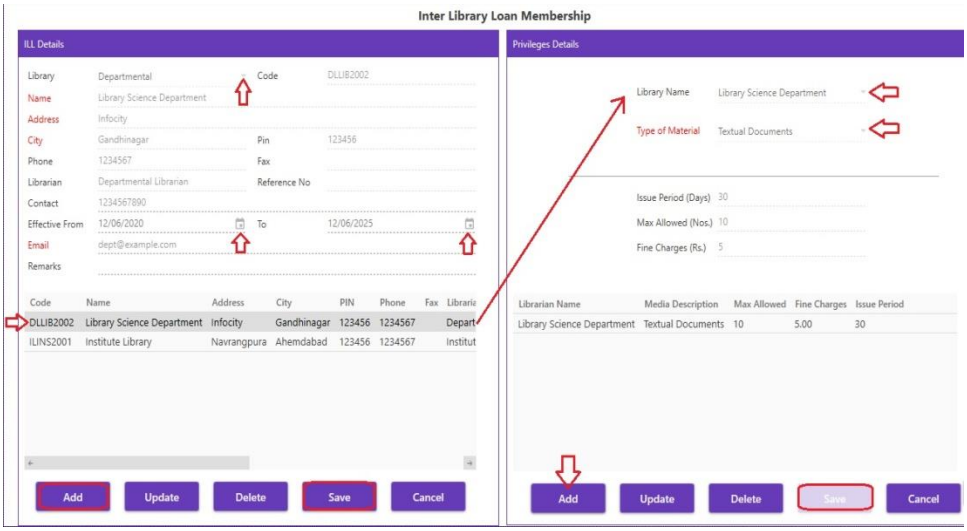


To create new Institutional Member -> select ‘Add’ -> fill-up requisite details of the institute and 'Save'. The new Institute will be created. To assign 'Privileges', highlight the institute in the left box and click 'Add' button appearing in the right box. Feed details like Type of Material, Maximum Loan Period, Maximum number of Items allowed and overdue charges – 'Save' details.

Updated information will appear in the row against the institution.

To Update details of any existing institutional member, in the left box highlight the row in which institution's name is appearing, click 'Update' – correct details as needed – and click on 'Save'. To Update privileges, follow the same process, but click 'Update' in the left box and correct the details – do not forget to 'Save' it.

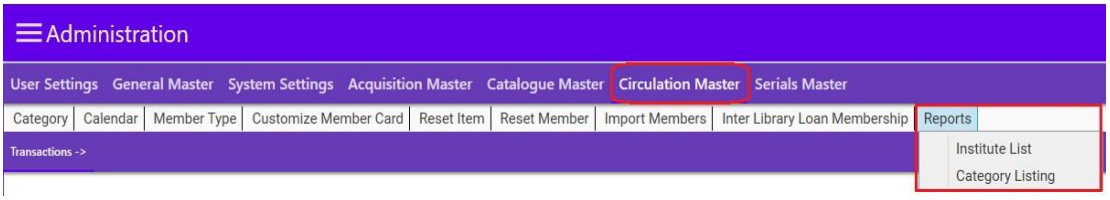
Inter Library Loan → Departmental Library:



Inter Library Loan → Click on Add button → Select Library: Departmental → Feed appropriate details → Save.

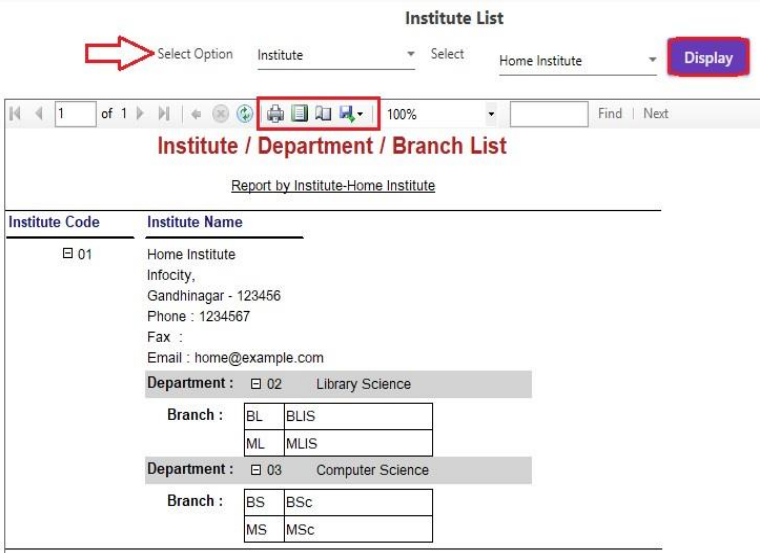
To add privileges: Select the department → Click on Add button to right side → Select Library name from dropdown → Type of Material → Assign Issue Period → Maximum allowed (Nos) → Fine Charges → Save.

Circulation Master → Reports:

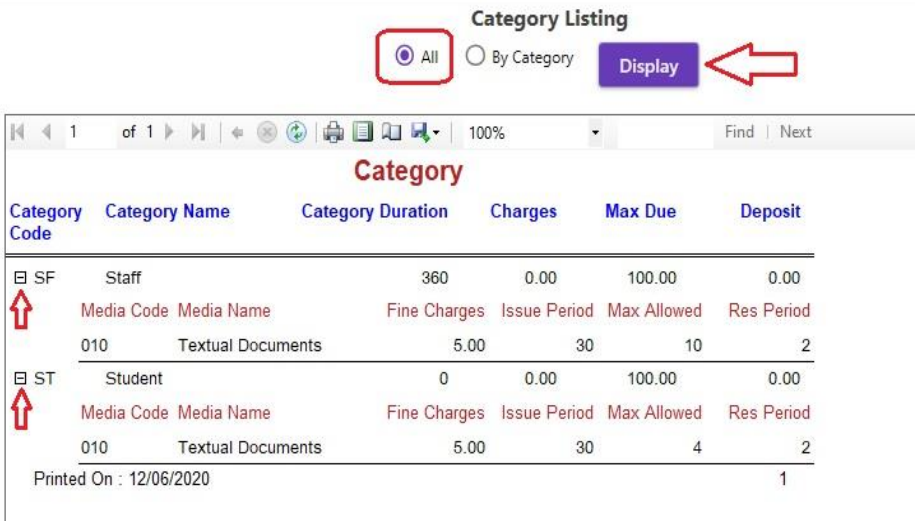


We can generate two reports from Circulation Masters, which can be saved in PDF, Word or Excel format and also can send mail;

1] Institute List (with its Departments and Branches)

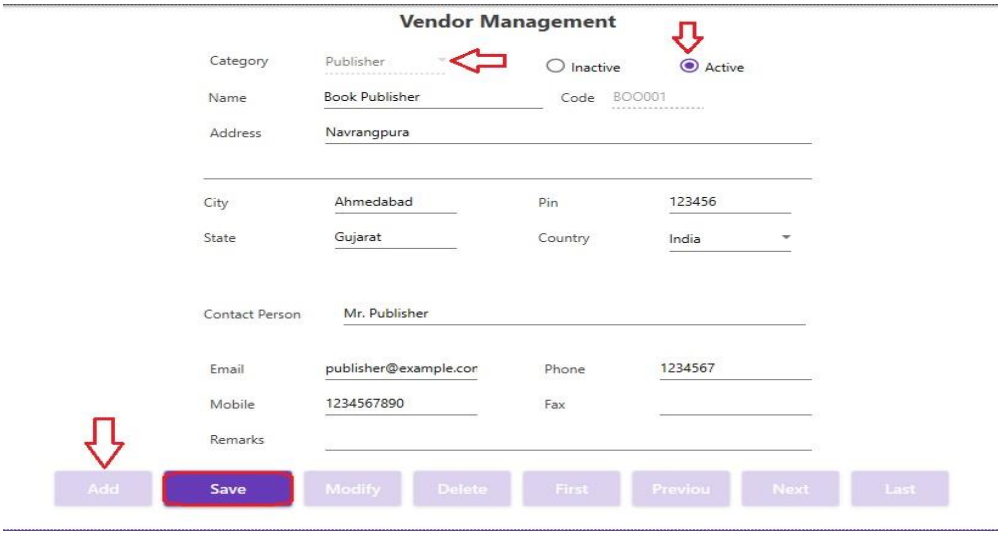


2] Membership Categories List (Category details)



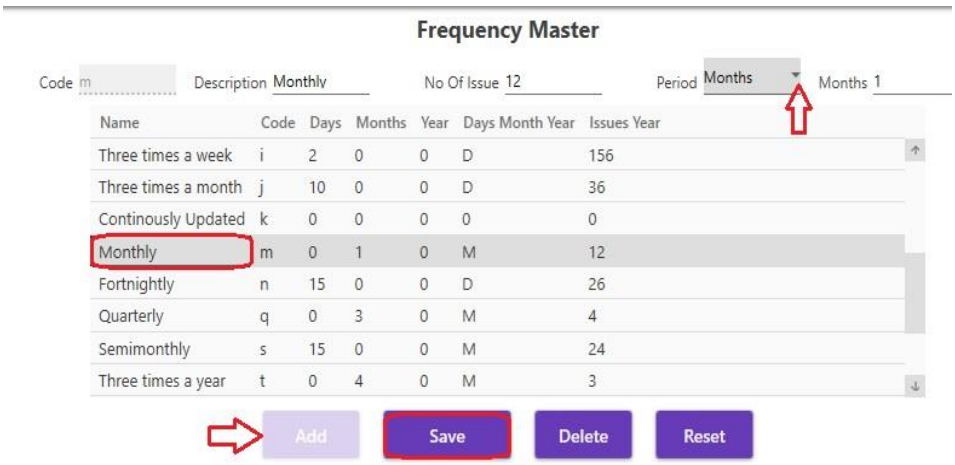
Administration → Serials Master.

Serials Master → Vendor Management:



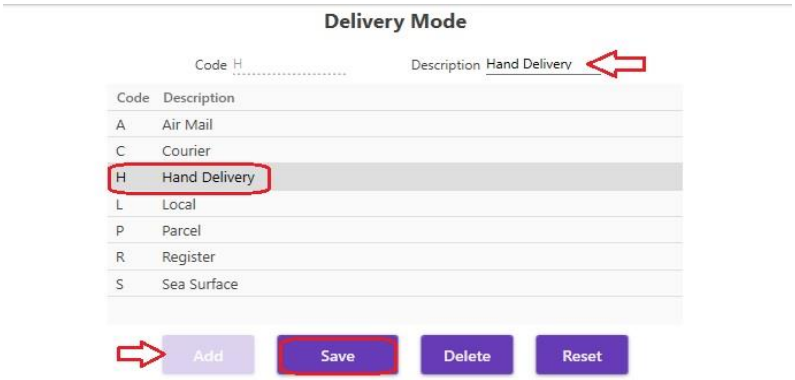
Vendor Management → Add → Select Category → Name → Address → City → Pin → State → Country → Contact Person → Email → Phone → Mobile → Fax → Remarks → Save.

Serials Master → Frequency Master:



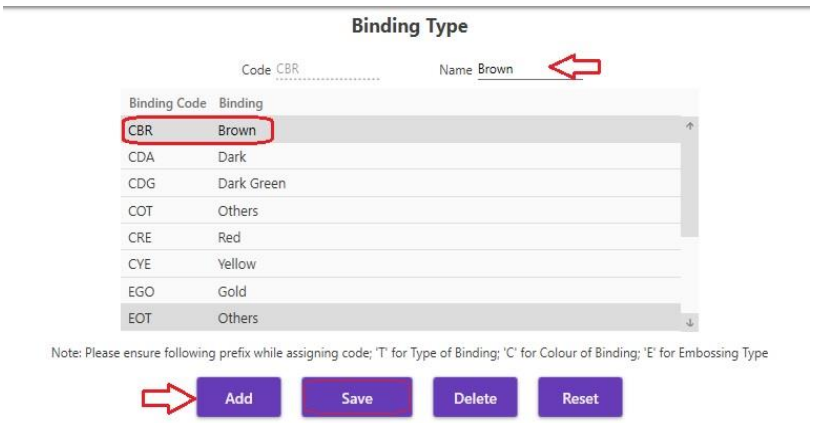
Frequency Master → Add → Code → Description → No. of Issue → Period → Months → Save.

Serials Master → Delivery Mode:



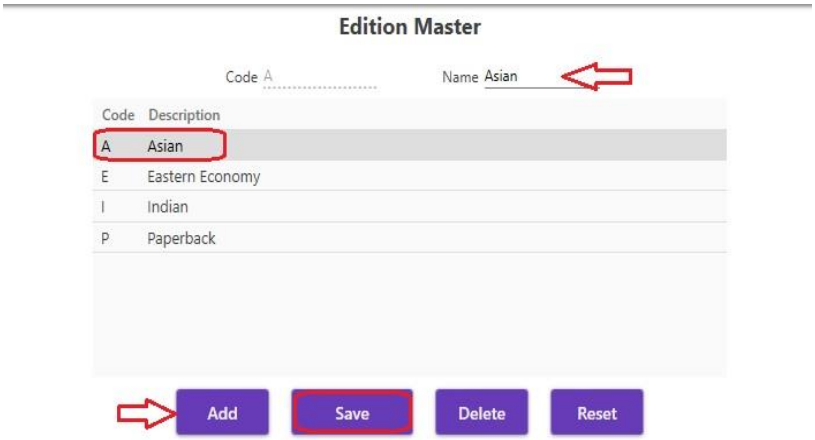
Delivery Mode → Add → Code → Description → Save.

Serials Master → Binding Type:



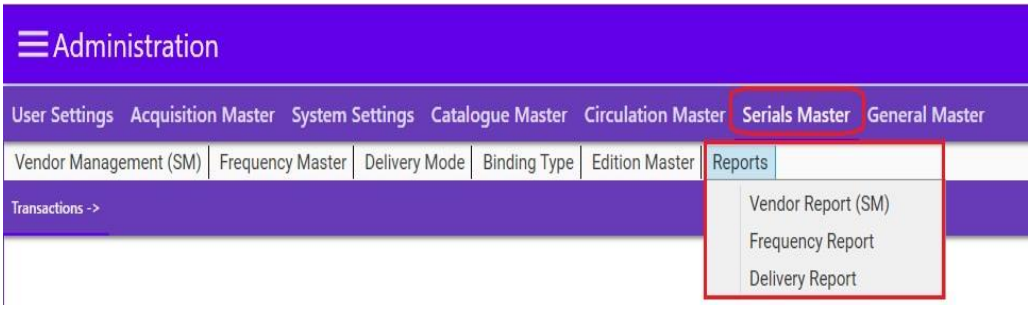
Binding Type → Add → Code → Name → Save.

Serials Master → Edition Master:



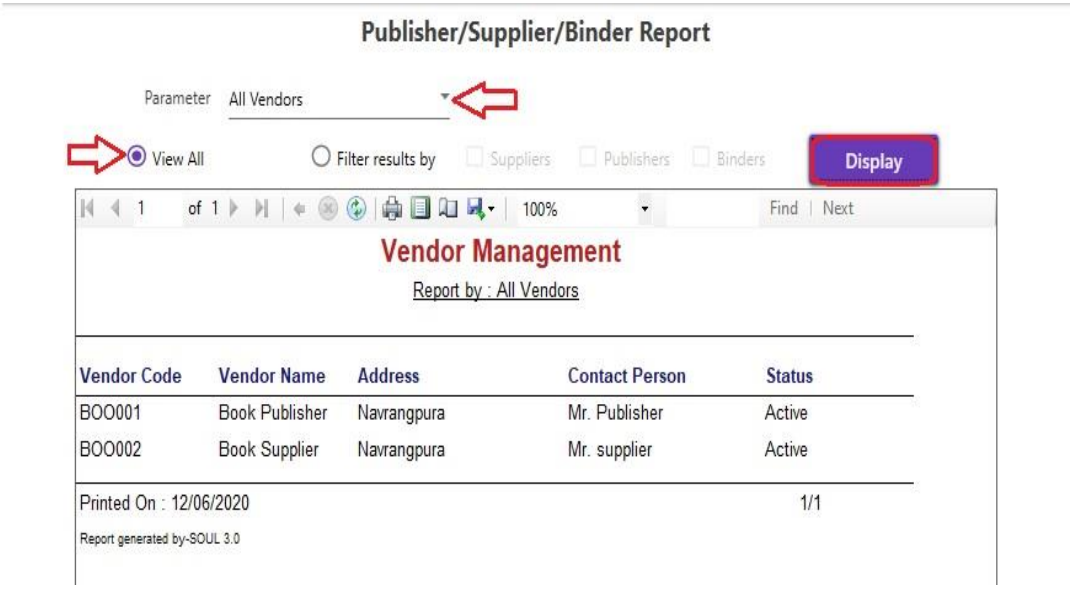
Edition Master → Add → Code → Name → Save.

Serials Master → Reports:



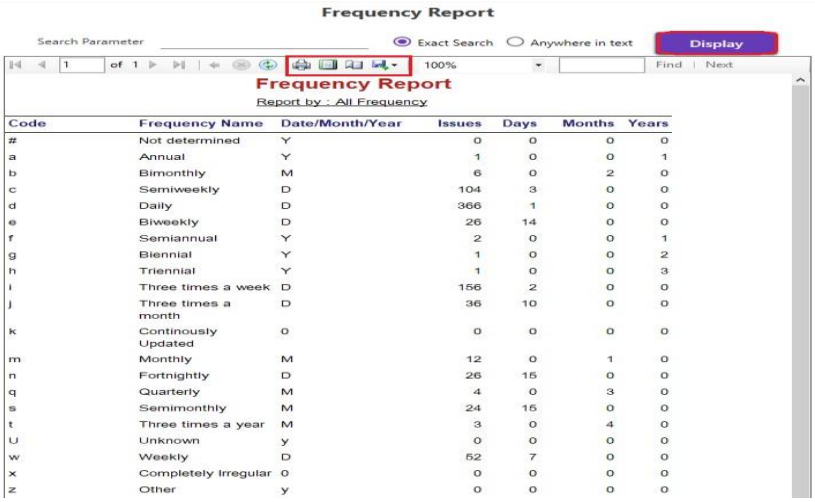
Reports → Vendor Report:

Vendor report can be generated by Active/Inactive/city wise/ status wise besides listing of all the vendors, these reports can also be filtered by Supplier/Publisher/Binder.



Reports → Frequency Report:

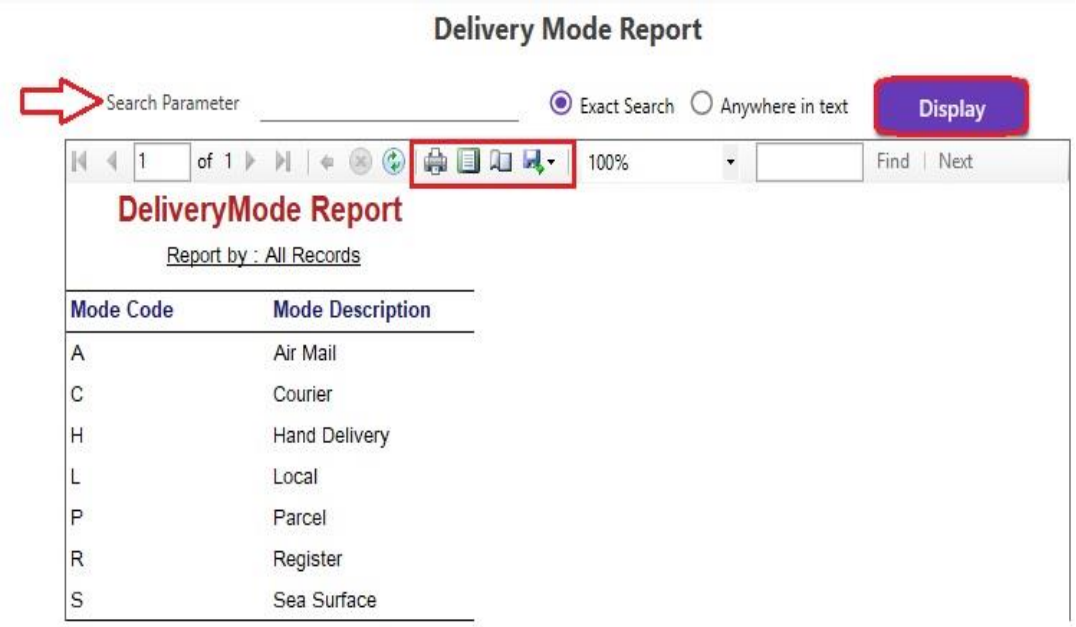
One can generate listing of all entered frequency either by “exact search” or “search by any word” within text, if you want listing of all the frequencies, in that case don't enter anything as search parameter, choose option as “Anywhere in Text” and press display button.



Code	Frequency Name	Date/Month/Year	Issues	Days	Months	Years
#	Not determined	Y	0	0	0	0
a	Annual	Y	1	0	0	1
b	Bimonthly	M	6	0	2	0
c	Semiweekly	D	104	3	0	0
d	Daily	D	366	1	0	0
e	Biweekly	D	26	14	0	0
f	Semiannual	Y	2	0	0	1
g	Biennial	Y	1	0	0	2
h	Triennial	Y	1	0	0	3
i	Three times a week	D	156	2	0	0
j	Three times a month	D	36	10	0	0
k	Continously Updated	0	0	0	0	0
m	Monthly	M	12	0	1	0
n	Fortnightly	D	26	15	0	0
q	Quarterly	M	4	0	3	0
s	Semimonthly	M	24	15	0	0
t	Three times a year	M	3	0	4	0
U	Unknown	y	0	0	0	0
w	Weekly	D	52	7	0	0
x	Completely Irregular	0	0	0	0	0
z	Other	y	0	0	0	0

Reports → Delivery Mode Report:

One can generate listing of all delivery modes using this report, the report parameters are same as described in “Frequency Report”.



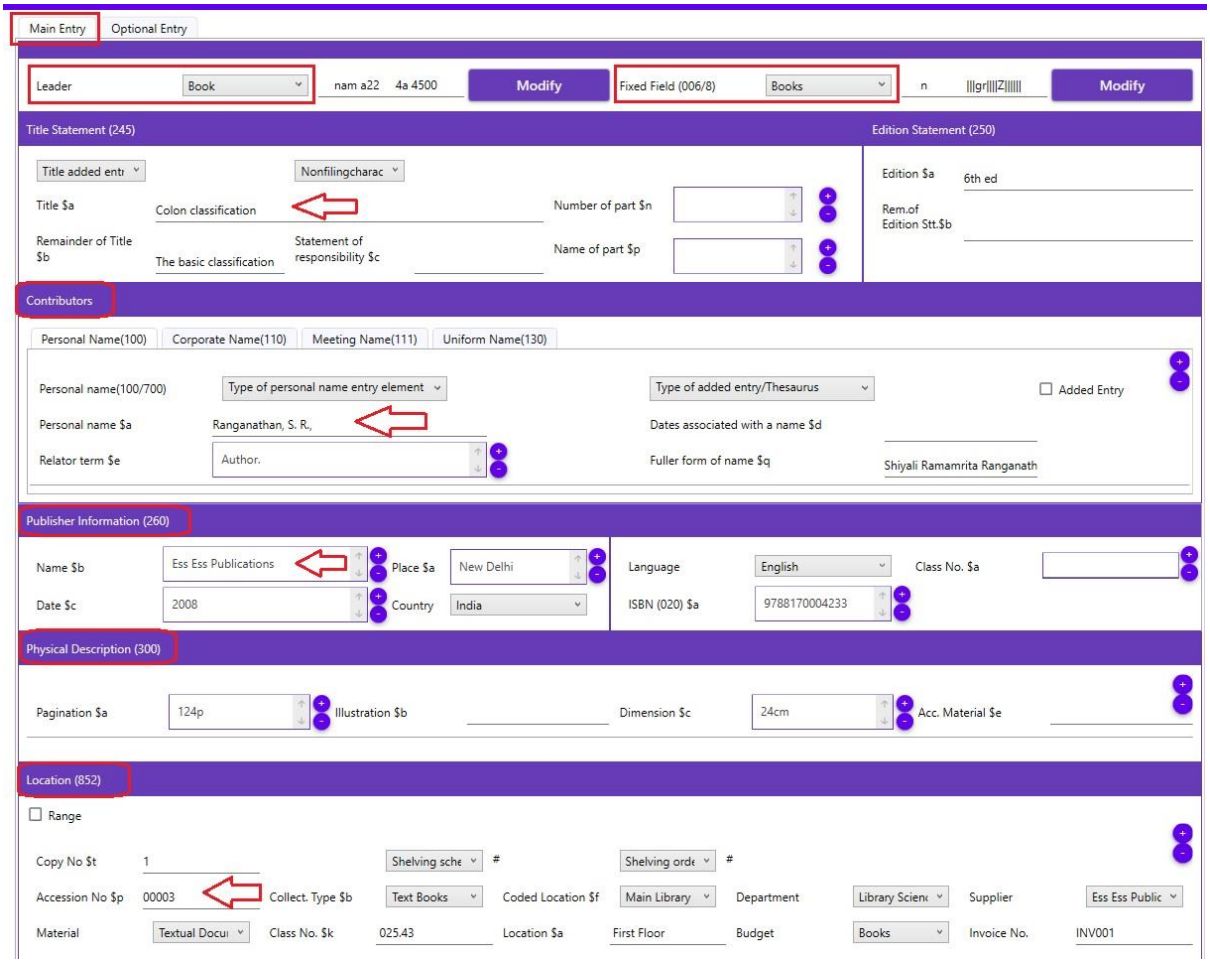
Mode Code	Mode Description
A	Air Mail
C	Courier
H	Hand Delivery
L	Local
P	Parcel
R	Register
S	Sea Surface

------XXX------

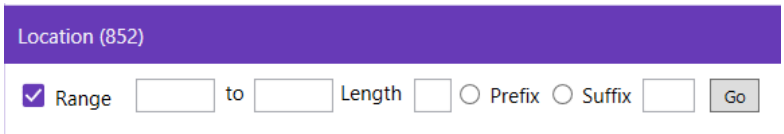
SOUL 3.0: Catalogue Module

Cataloguing → Book:

Main Entry:



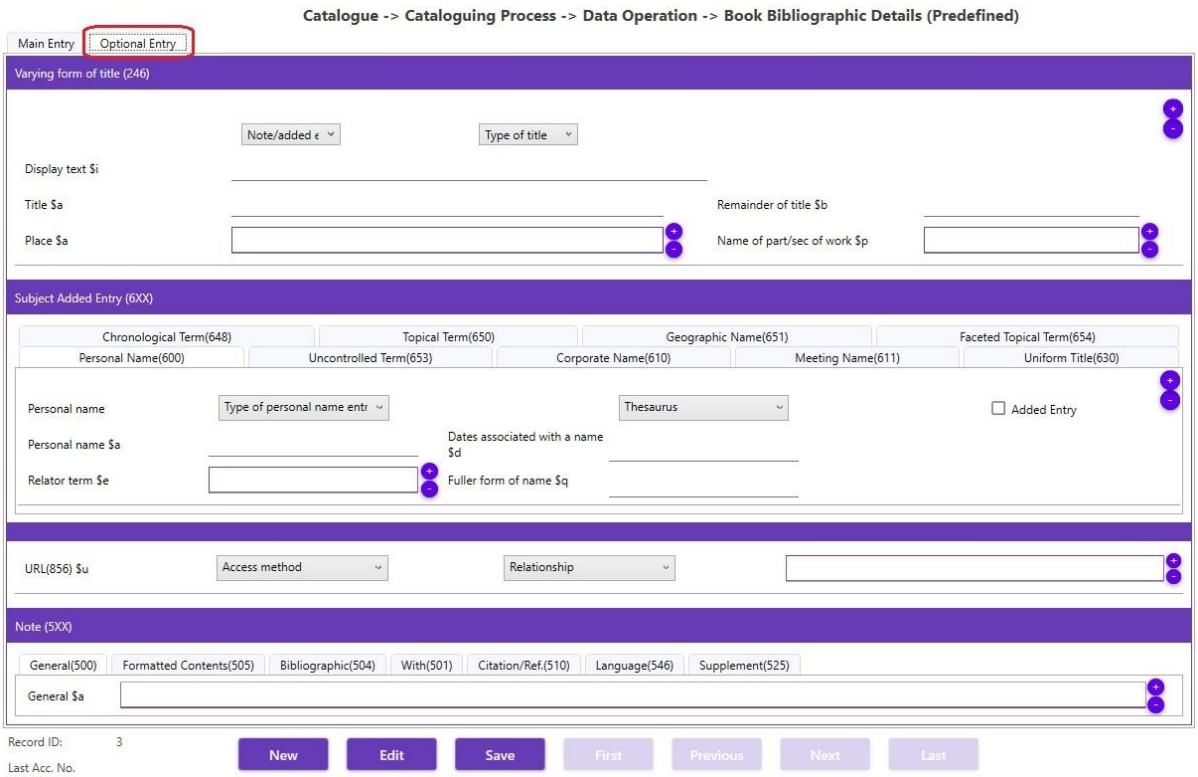
- **Main Entry**→ Leader from dropdown menu (Book) → Fixed Field from dropdown menu (Book)
- Title statement (Tag 245): Add title → Remainder of title if any → Statement of responsibility if any.
- Edition Statement (Tag 250): Add edition.
- Contributors: Personal name (Tag 100/700): Add personal name (Author's name)→ Relator term (Author). Click Added Entry for second author→ click once on plus + sign and add the second author.
- Publisher Information (Tag 260): Add name → Place → Country→Date (year of publication). Select language →Class number from dropdown menu → Add ISBN;
- Physical Description (Tag 300): Add Pagination → Illustrations → Dimension → Accompanying Material;
- Location (Tag 852): Add Accession → Material → Collection type → Class number → Coded Location→ Shelving location → Shelving location→ Department →Budget → Currency →Price→ Supplier → Invoice number → Invoice date → Date of acquisition. If the title is restricted for circulation, click the check box;
- Add Range of Accession numbers in case of multiple copies entry:



You can add range of accession numbers using this option.

- Multiseries: Tick mark 'Multi Series → Click on the button Add Series → enter Series Statement, Volume Designator and ISSN Number →click the OK button.
- To attach any document, click on "Select File", select the desired file from browser window. At the click of 'Save' in the main data entry screen, the attached file will be uploaded to the database. User have option to attach multiple files with single record.

Optional Entry:



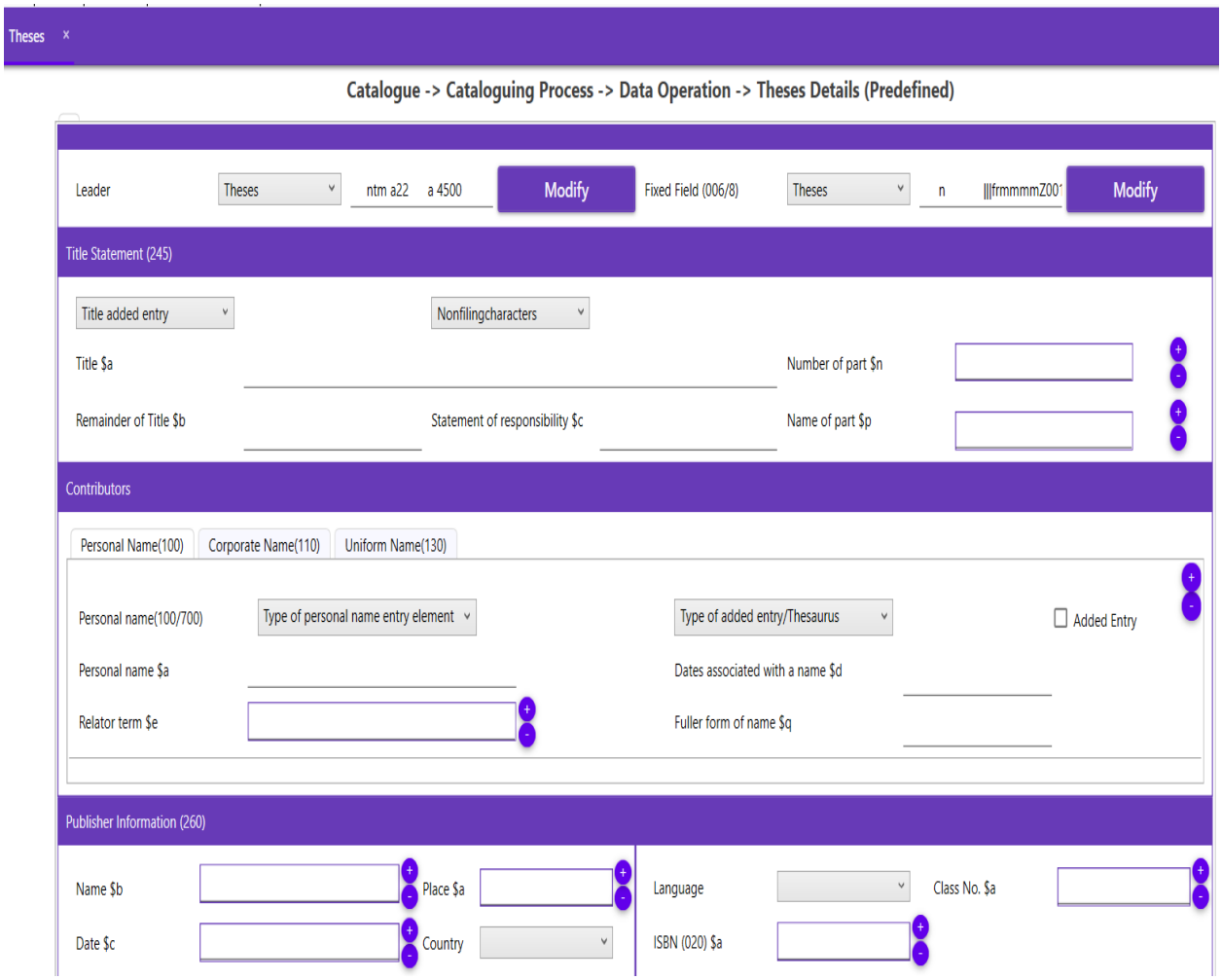
- Varying Form of Title (Tag 246): Add title → Place → Remainder of title → Name of part/section of work;
- Subject added entry (6xx) Uncontrolled term (653): Add keywords instead of subject headings. To add multiple keywords click on + sign;
- URL (856): Enter fully qualified URL specifying the protocol (i.e. http://, https://, ftp: etc) which will enable users to directly access that resource by clicking in OPAC.

Edit Records:

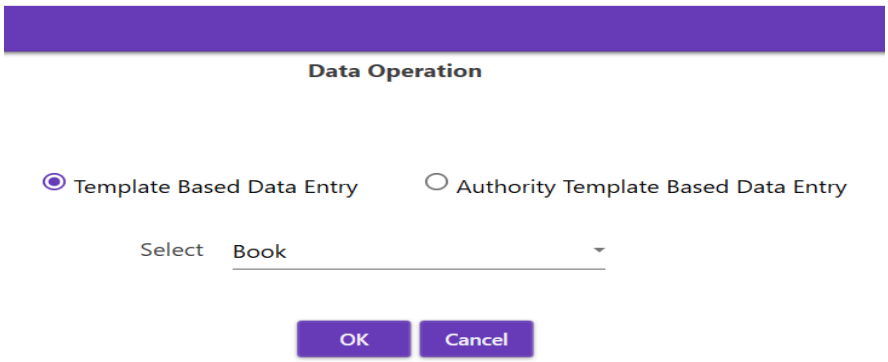
- Click Edit button → Select either Record ID, Range of Records, A particular accession number, By User Name, Range of Date Entered as well as by searching through OPAC by clicking 'Search' radio button.

Cataloguing → Theses:

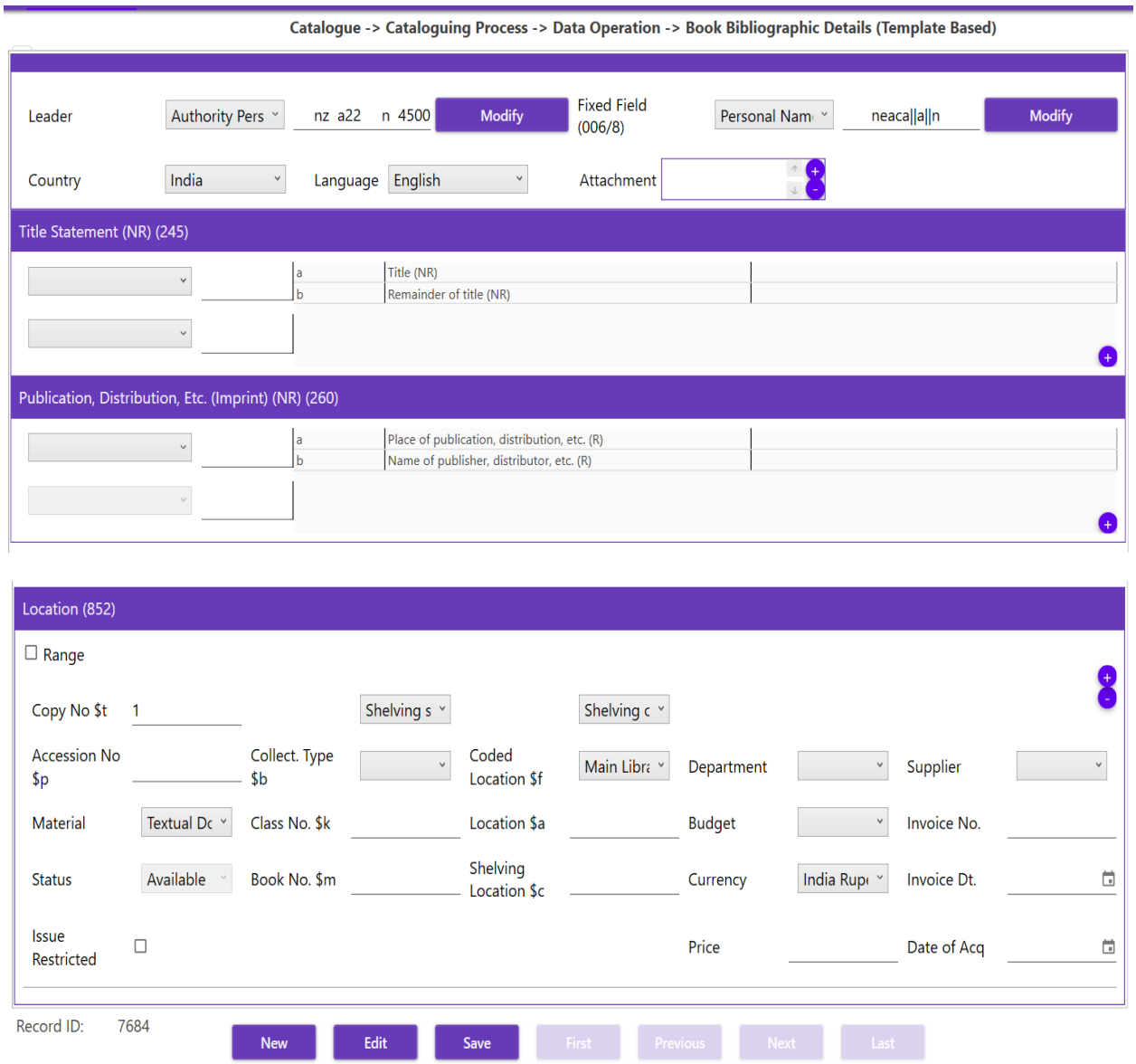
- This form is used to enter bibliographic details for Theses same like book entry shown above.



Cataloguing → Data Operation (Bibliographic/Authority entry based on template):



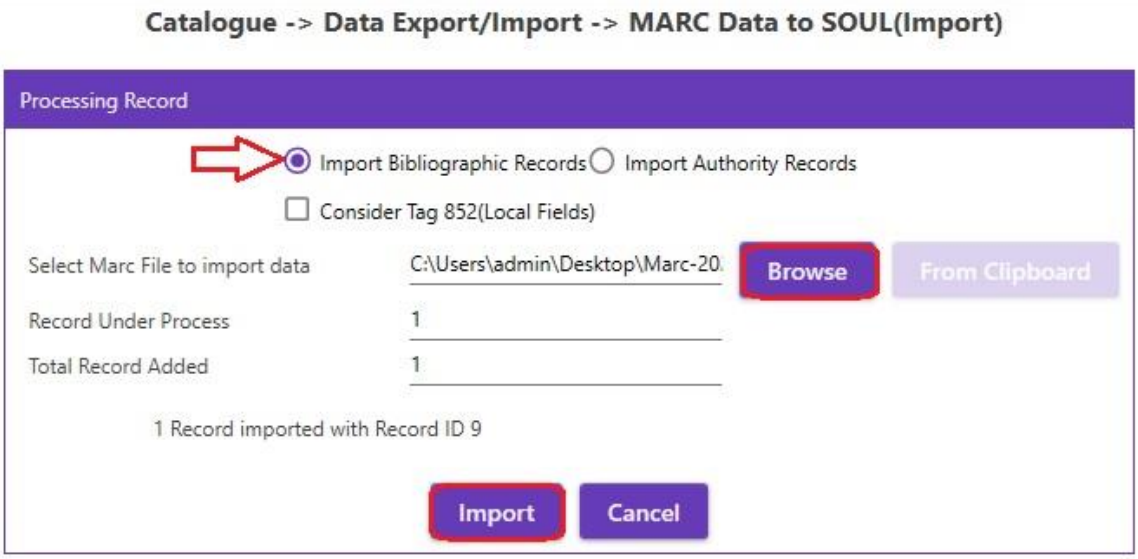
After clicking “OK” button, following screen will be appeared.



Bibliographic/Authority entry for the selected fields using template-based entry can be done using this option. Before that it is mandatory to create a Data Entry Template in Administration Module. (Administration > Catalogue Master > Data Entry Template).

Import/ Export:

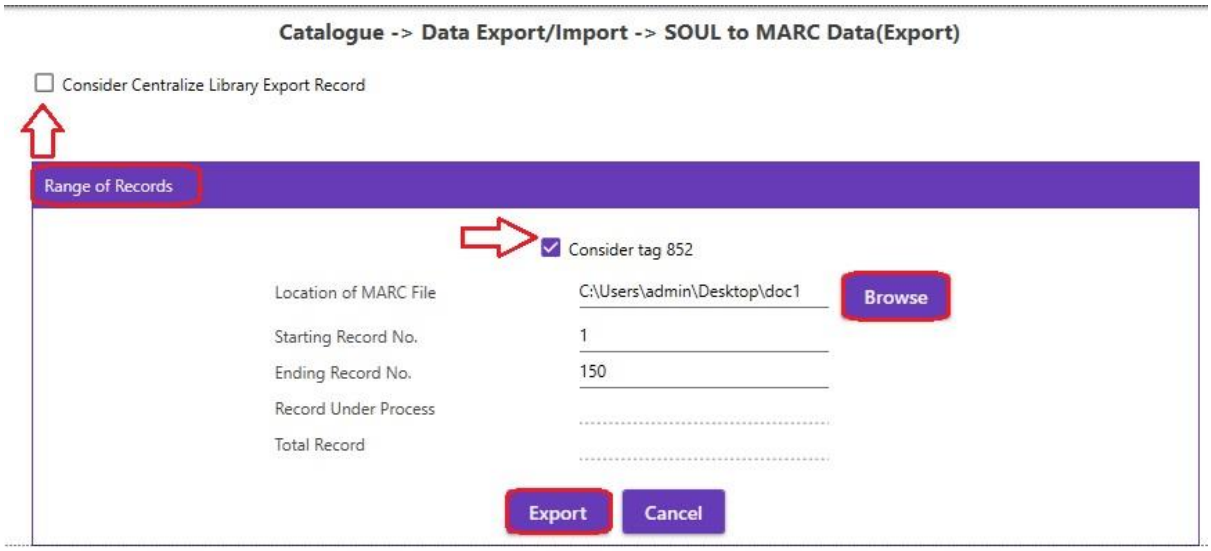
Import from MARC:



First of all you have to download marc record from various sites like, http://catalog.loc.gov/, http://indcat.inflibnet.ac.in/

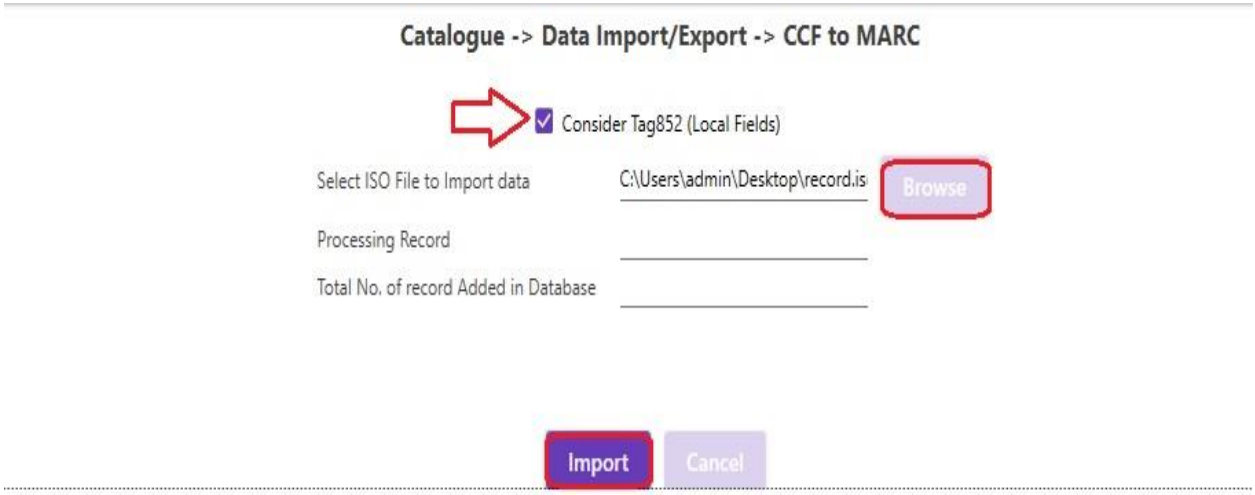
- Click on Import/ Export → Import from MARC → Select MARC file to import data from where you have saved earlier → Click on Import → Add Accession no. to Imported data → Enter title which is imported by you → click on search →select record → fill (852 MARC tag) Location related information and click on save.

Export to MARC:



- To export Data from SOUL to MARC format follow the steps:
  Click on Export to marc → Enter the location of the marc file in which you want to export data → Enter starting record and ending record → click on export.

CCF to MARC:

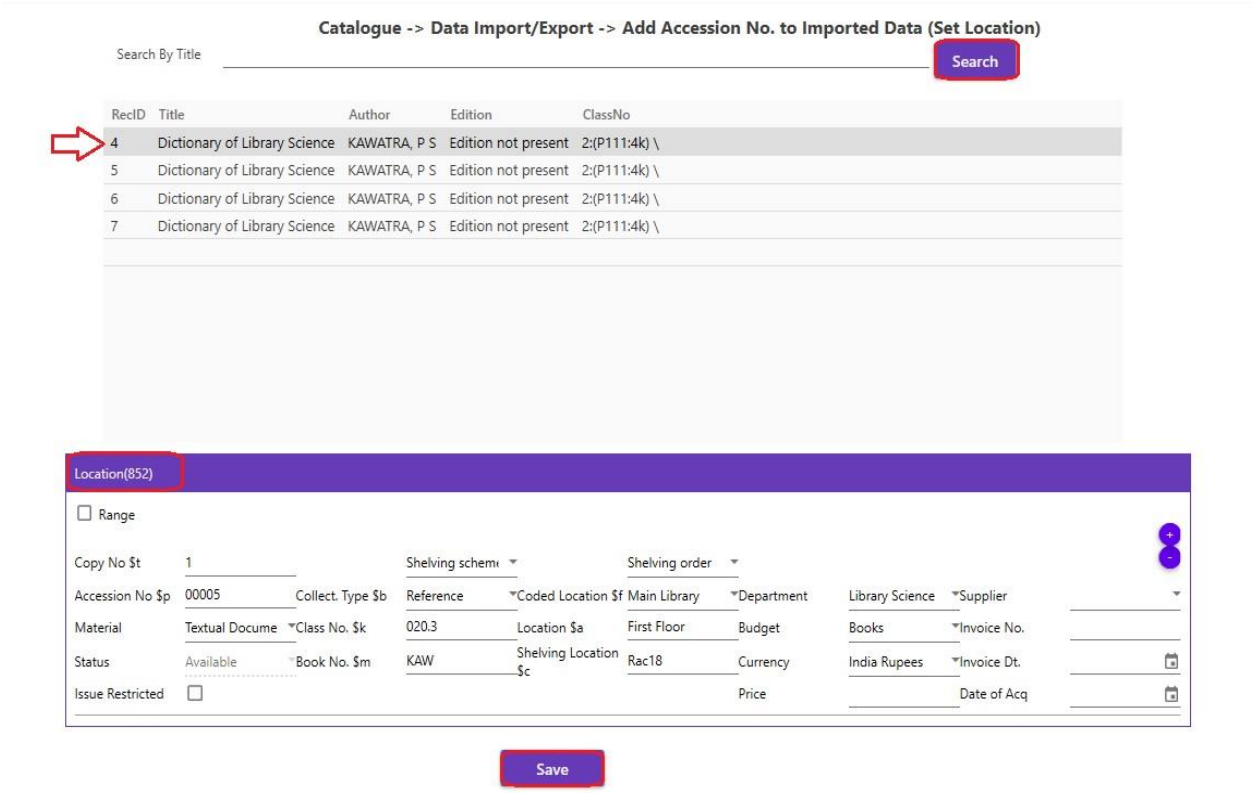


- If you have a data in iso format or CCF format then you can convert in to SOUL 3.0 through **CCF to MARC**
  Click on CCF to MARC → Select ISO file → click on import → Add Accession no. to Imported Data.

MARCXML to SOUL:

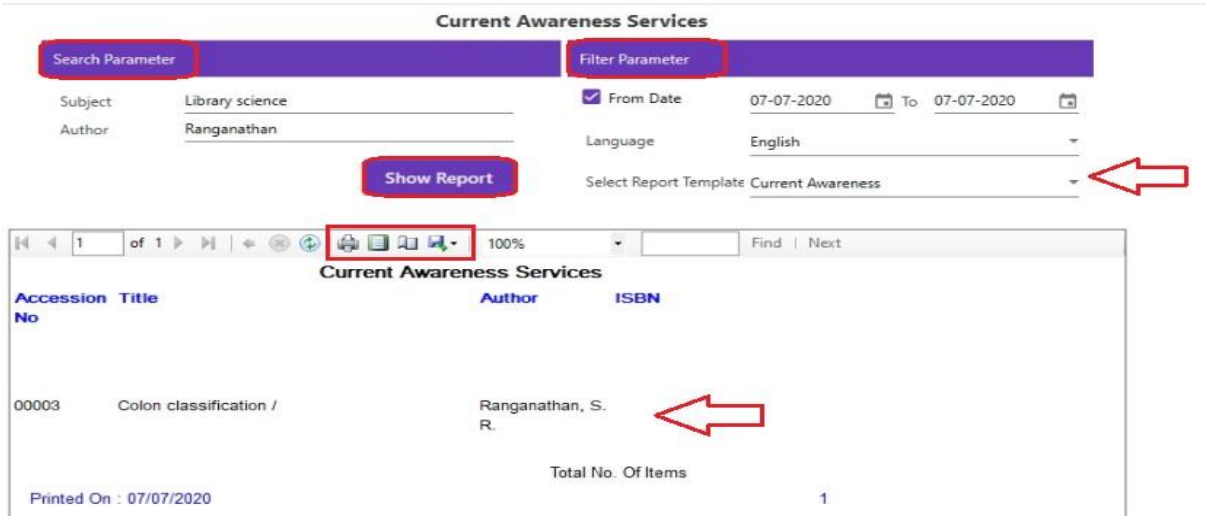
- You can also import data from XML format.
  Click on Import from MARCXML to SOUL → Select XML file → click on Import XML →Add Accession no to imported data.

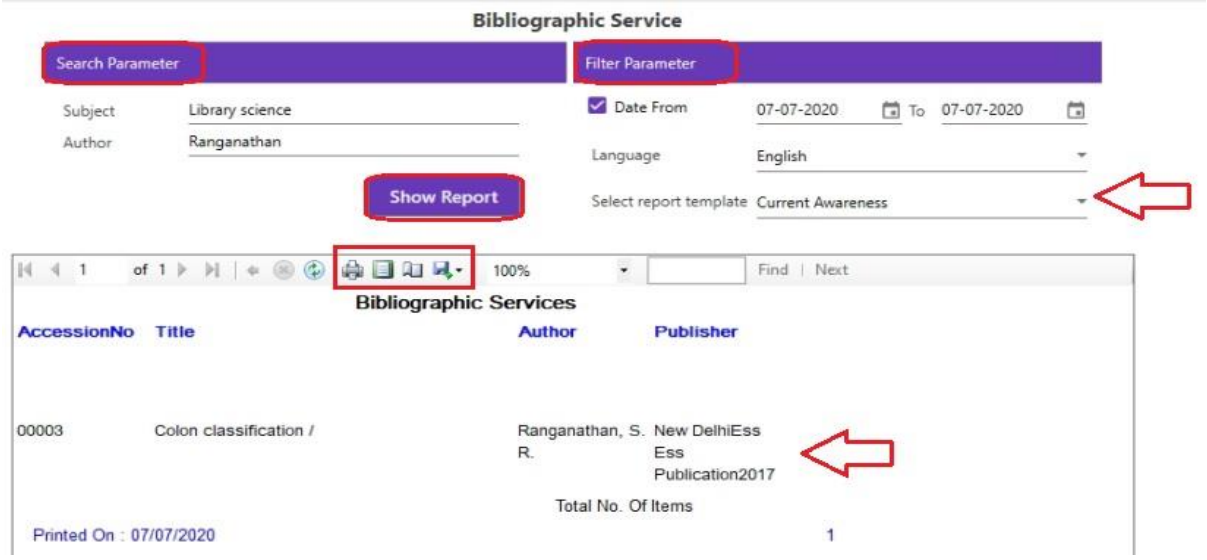
Add Accession Number to the Imported Record:



- Click on the search button→Select title to be accessioned from imported titles which is to be accessioned→ enter the other details (location 852) as done in predefined data sheet.

User Services: Current Awareness / Bibliographic Service:





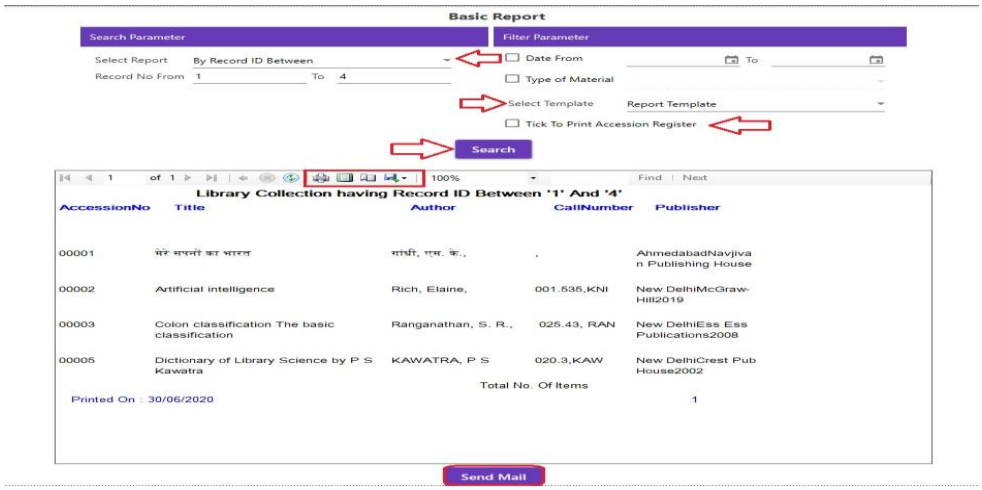
- You can provide user services like CAS, SDI and Bibliographic services through sub module of catalogue module Click on User services → Current Awareness services → enter subject in which you want to provide CAS → Author → Language → Report Template → Show → Save into PDF/Excel or Mail it to concerned user through send mail button.

- You can provide Bibliographic services same as CAS.

Reports:

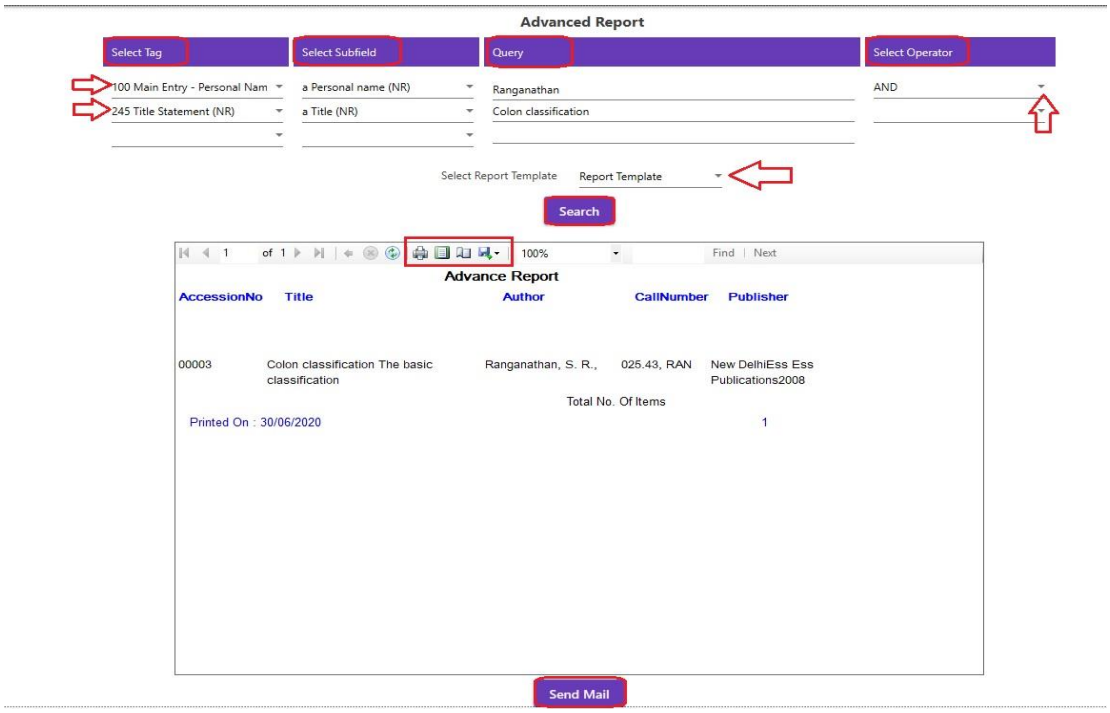
Definitions of these reports are set in Administration->Catalogue Master->Report Templates.

Basic:



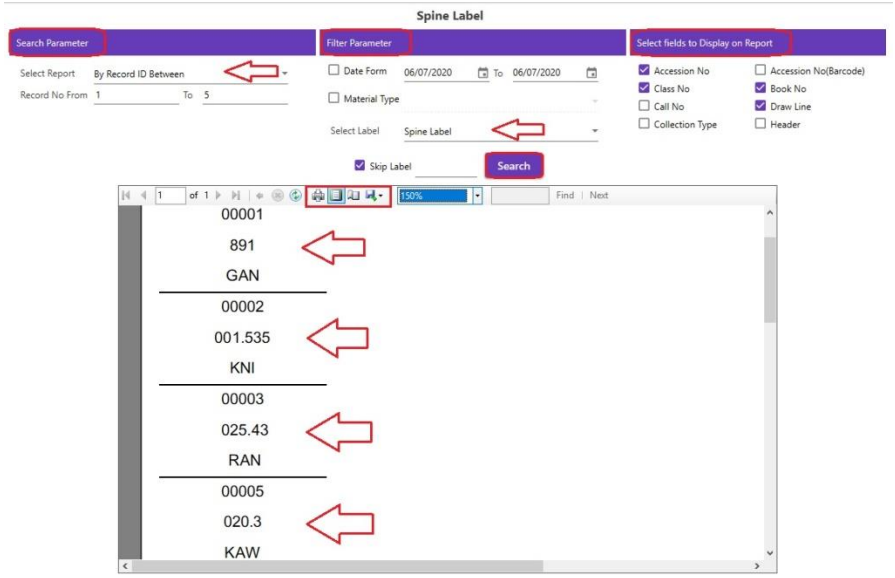
- Enter appropriate parameters and filters, as well as select the desired template and click on the search button to get the report.

Advance:



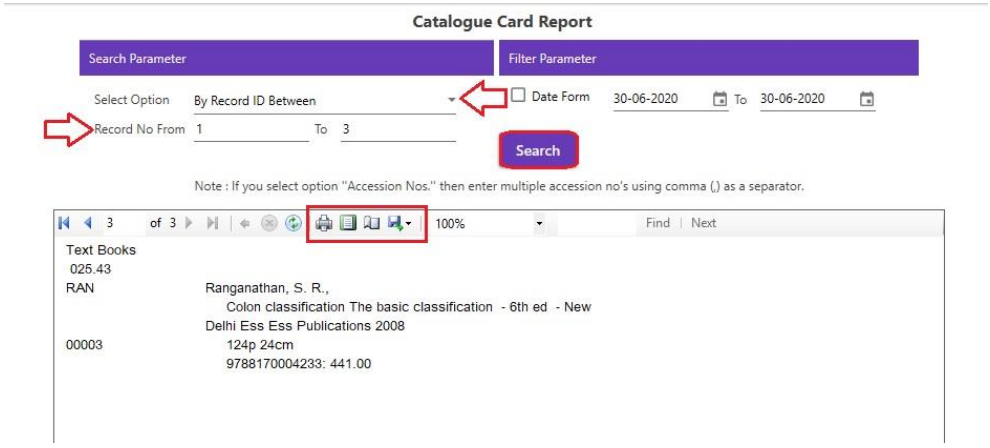
- Advance report allows you to use Boolean operators by selecting requisite MARC fields, and the sub-fields too. There are good numbers of filters to limit your search based on your requirements. You may also customize report template based on your requirements.

Spine Labels/Book Card/Bar Code:



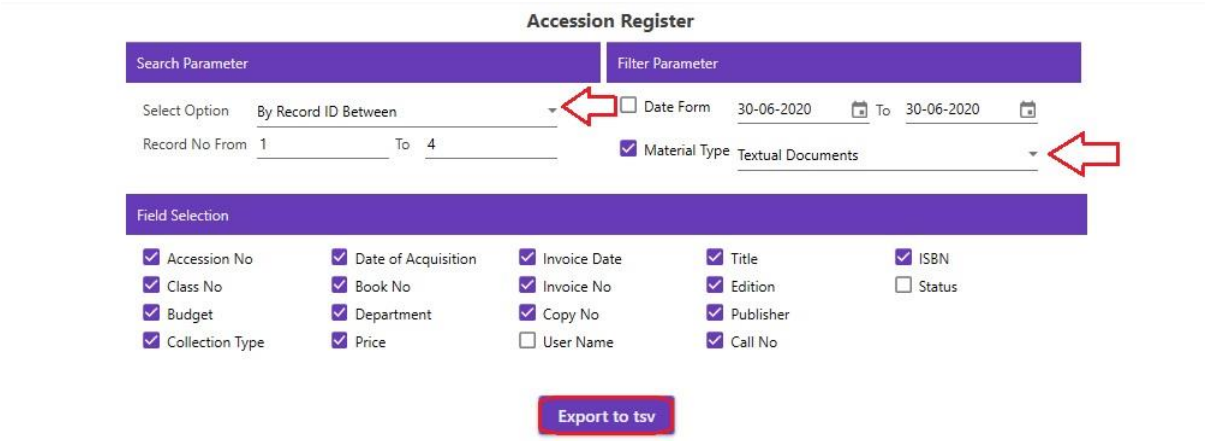
- Select the report criteria→Fields required→ Select Label→Search.
- The sequence of the fields display is based on the field selection, i.e., if you have selected "Accession No" field first then it will display first.
- If you want to skip initial labels from printing then enter the number of labels in "Skip Label" option.

Catalogue Card:



- Select parameter from drop down → Dates between→ Search.

Accession Register:



- Select the fields to export, the sequence in ticking the boxes decides the placement of the field→ select filter parameter either date or type of material→ Export to tsv.
- After exporting the data, you may open this TSV file in Microsoft Excel and any editor and take print after adjusting fields.

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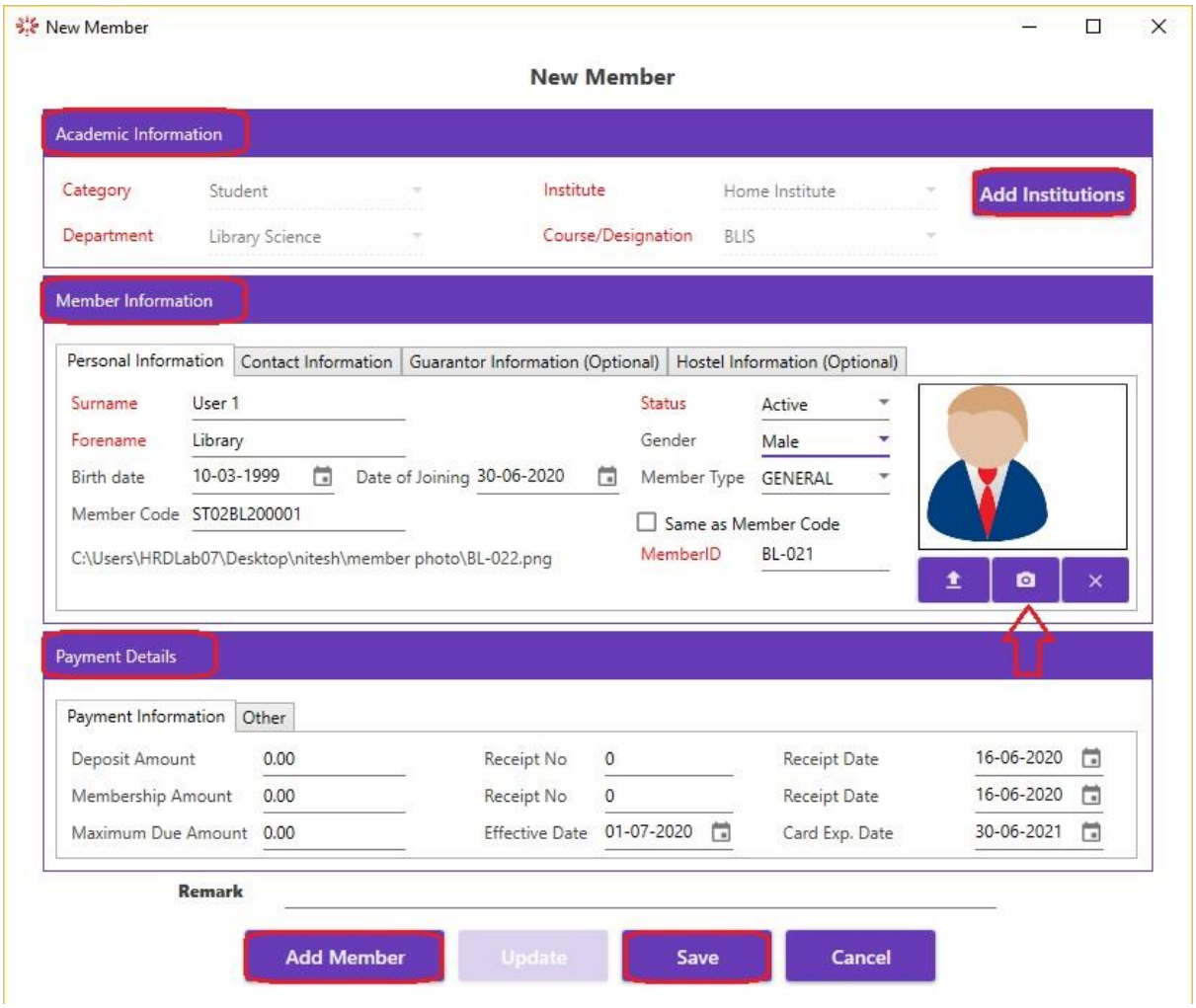
SOUL 3.0: Circulation Module

Before starting with the Membership, check whether prerequisites have been added in the Administration Module, General Master i.e. Institute Details and in Circulation Master, Category and Member Type.

Membership→ New Member:



Academic Information: Select Category→ Institute→ Department→ Course/Designation from the dropdown menu;

Member Information:

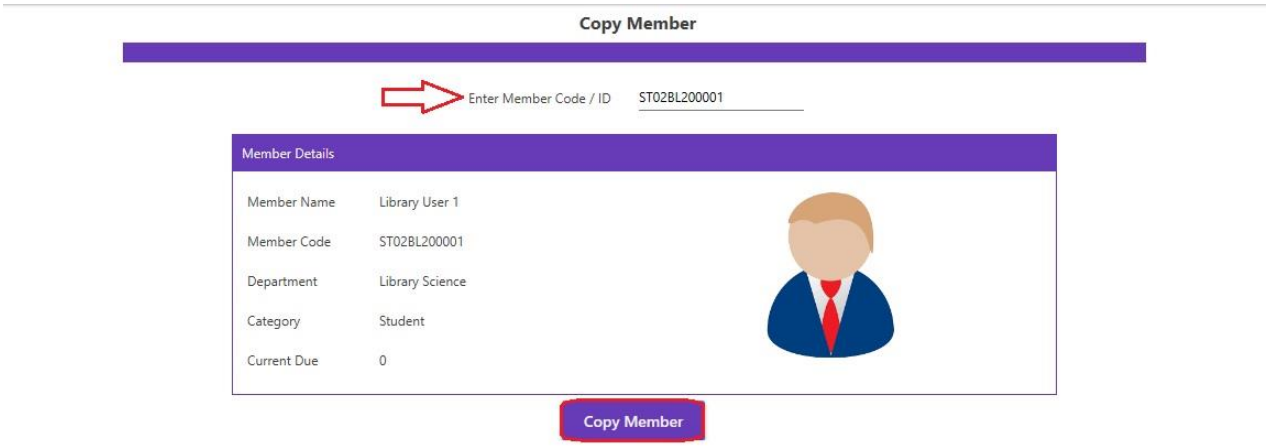
- **Personal Information** → Add Surname→ Forename → Birth Date → Date of Joining → Select Status → Gender → Member Type → Member ID (To keep it same as the code, click in the check box).
- **Contact Information** → Add Permanent Address → Present Address (If permanent address is same as present, click in the check box).
- **Guarantor Information**→ If Library member is the guarantor, click in the check box→ fill in the details.
- **Hostel Information**→ Details of hostel to be filled in.

- **Add Photo**→ Click on + sign/Camera → Select Device→ Start Camera → Capture → Stop Camera.

Payment Details:

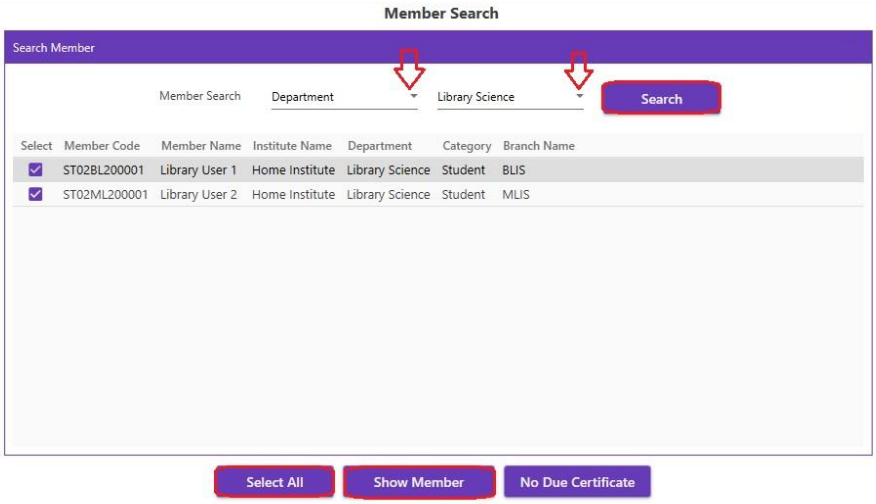
- **Payment Information**: Deposit Amount ,Receipt Number, Receipt Date→ Membership Amount, Receipt Number, Receipt Date → Maximum Amount due → Effective date → Card expiry date.
- **Others**: Card Issued and No Dues, Graduation Date.
- **After filling above details click on Save button**→ Member code will generate.

Membership → Copy Member:



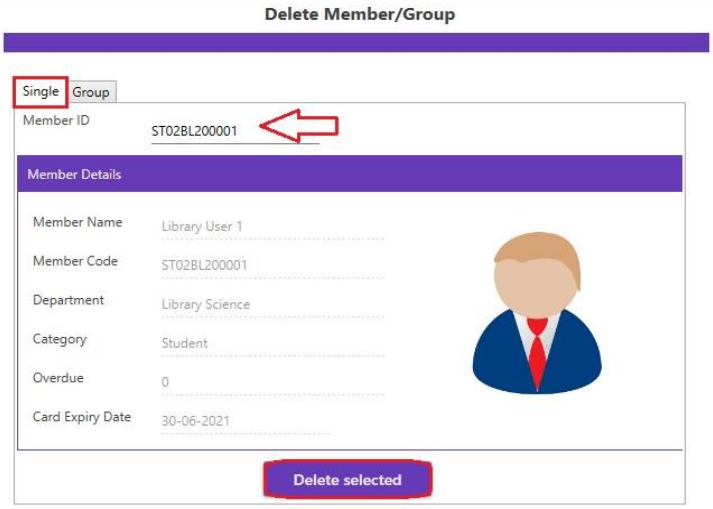
- Enter Member Code/ID→Copy Member.

Membership → Search Member:



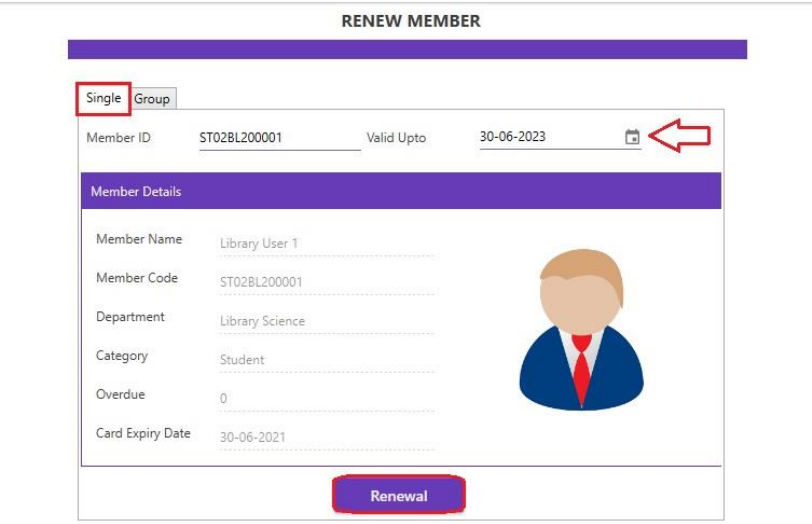
- Select Criteria → Select the opted criteria again → select the members by clicking in the check box → Show Member or No Due Certificate.

Membership → Delete Members:



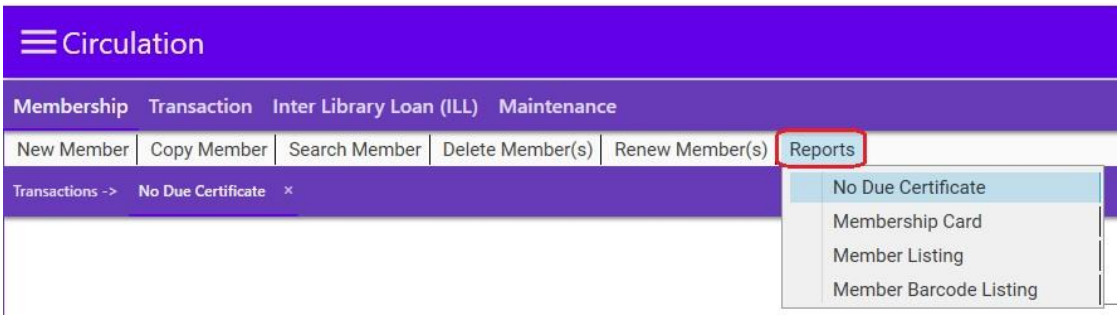
- Single/Group → Mention member ID → Delete.

Membership → Renew Members:



- Single/Group → Give Member ID → Valid upto Date → Renewal.

Membership → Reports:



No Due Certificate:

- Select Category → Institute →Department → Course & Designation → Entry From and To → Search →Click the check box to select the member→ No Due Certificate.

Membership Card:

- Filter by Library/Search by criteria → Select criteria → Select Template → Click in the check if Border or Principal's Signature required → Display.

Member Listing:

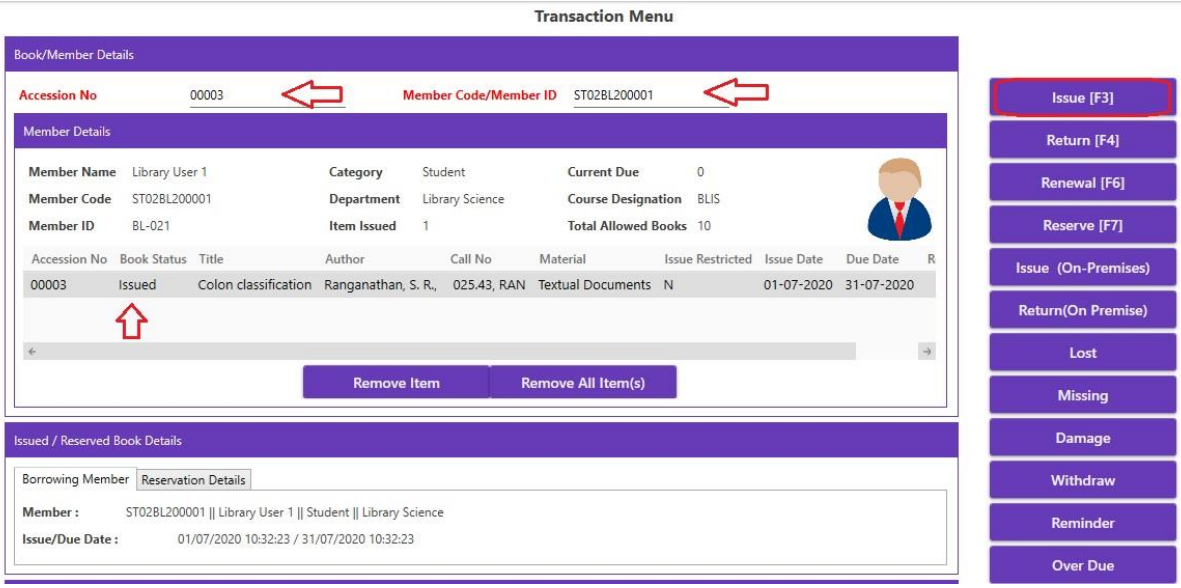
- Select options → Click on the check box, No Due Members or Date Between → Display.

Member Barcode Listing:

- Filter by Library → Search by → Select Template → Click on check box if Member Code, Member Barcode, Header is required and skip label → Display.

Transaction:

Transaction→ Transaction Menu:



- Issue items: Enter Accession Number→ Member Code or Member ID→Issue (F3).
- Return items: Enter Accession Number→ Click on tab button→ Return (F4).
- Renew Items: Enter Accession Number → Click on Renewal (F6).
- Reserve Items: Enter Accession Number → Click on Reserve (F7).
- Issue on Premises: Enter Accession Number → Click Issue on Premises.
- Return on Premises: Enter Accession Number → Click return on Premises.

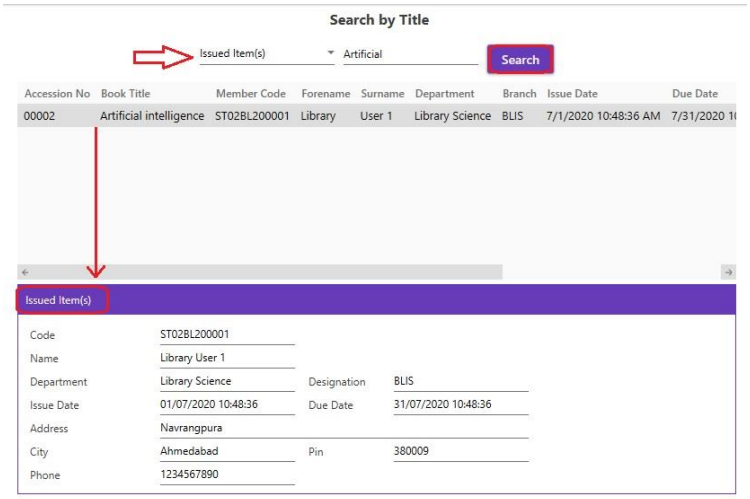
To change the status of the items:

- Lost: Enter Accession Number→ Click on Lost.
- Missing: Enter Accession Number→ Click on Missing.
- Damage: Enter Accession Number→ Click on Damage.
- Withdraw: Enter Accession Number→ Click on Withdraw.

To generate reminder letter;

- Add accession number→ Click on reminder button.
- Overdue: Click on Over Due→ Enter Member Code or Member ID → Click on Search Button → Enter the Amount received → Click on Make Payment → Click on Print for receipt.

Transaction→ Search by Title:

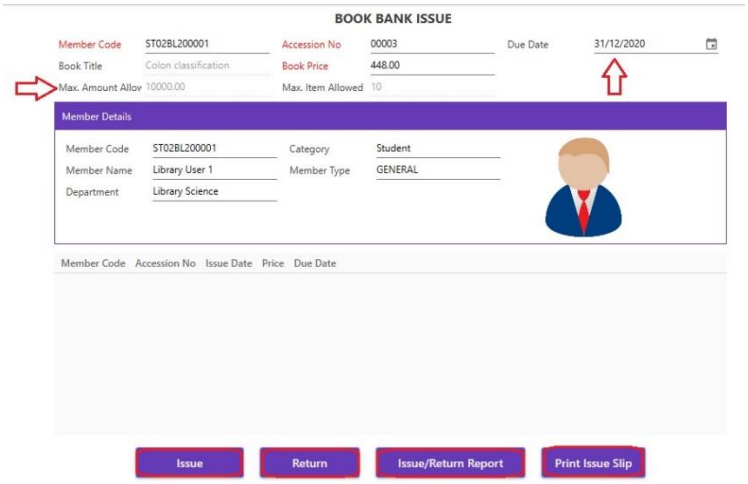


- Select either Items issues or Items issued on ILL → Enter few words of the title → Click on Search button → from the titles displayed select the title to get the borrower's details.

Transaction→ Overdue Charges:

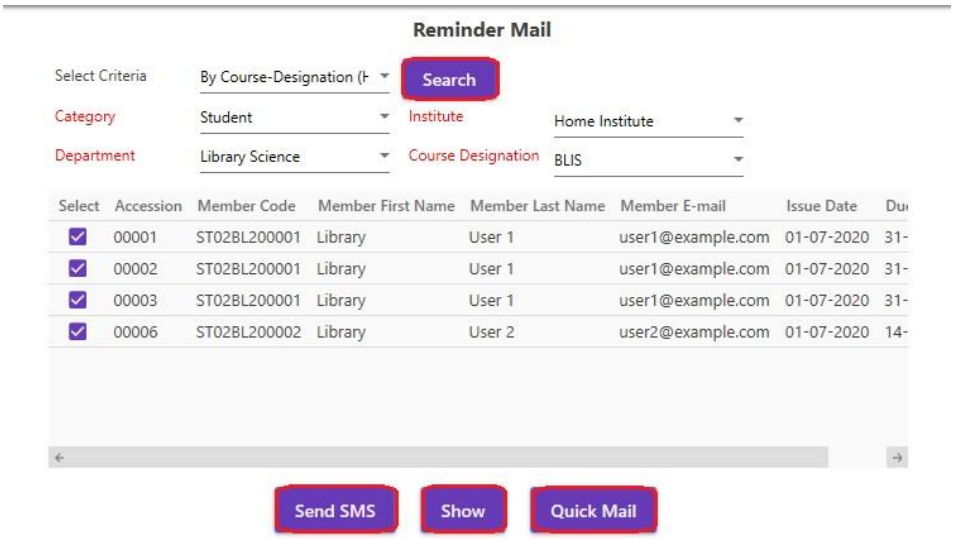
- Overdue: Click on Over Due→ Enter Member Code or Member ID → Click on Search Button → Enter the Amount received → Click on Make Payment → Click on Print for receipt.

Transaction→ Book Bank Issue:



- Issue Items: Enter Member Code or Member ID → Accession Number → Click on Issue Button.
- Return Items: Enter Accession Number → Click on Return.

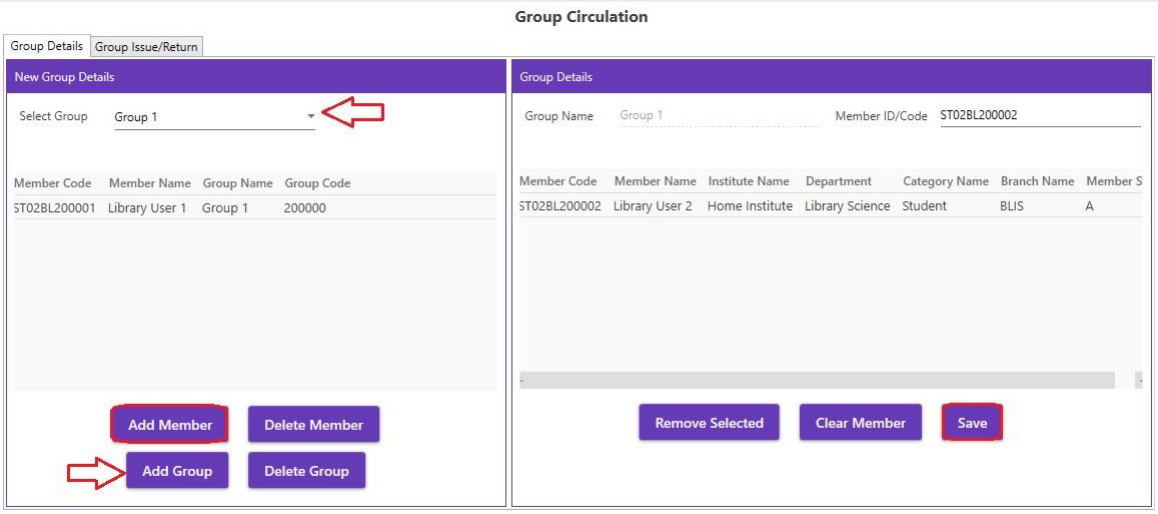
Transaction→ Reminder:



- Select Criteria i.e By Due date between/By Course/Designation/By Member Code → Select Category → Institute → Department → Course/Designation→ Search → Select the members displayed to send reminder mail → Click on Show or Send SMS.

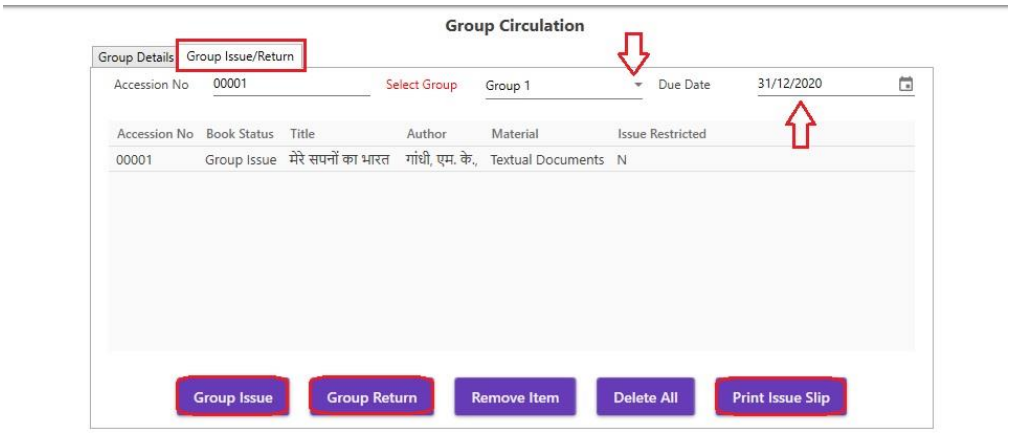
Transaction→ Circulation Group:

Group Details: To create the group and add/delete members:



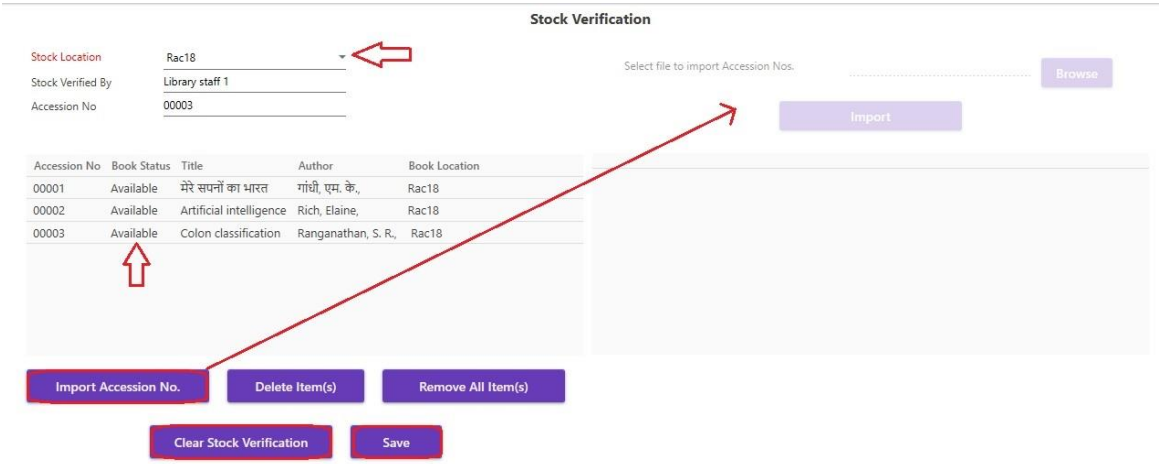
- Click on Add Group button → Assign Group Name → Add Member → Enter the members names →Save.
- Delete Group/Member: Select Group name/Select individual member → Delete Group/Member.

Group Issue/Return:



- Issue Items: Give Accession Number → Select Group → Due Date → Click on Group Issue button.
- Return Items: Accession Number → Group Return.

Transaction→ Stock Verification:



Option to add accession numbers manually:

- Select Stock Location → Stock Verified by → Add accession number → Save.

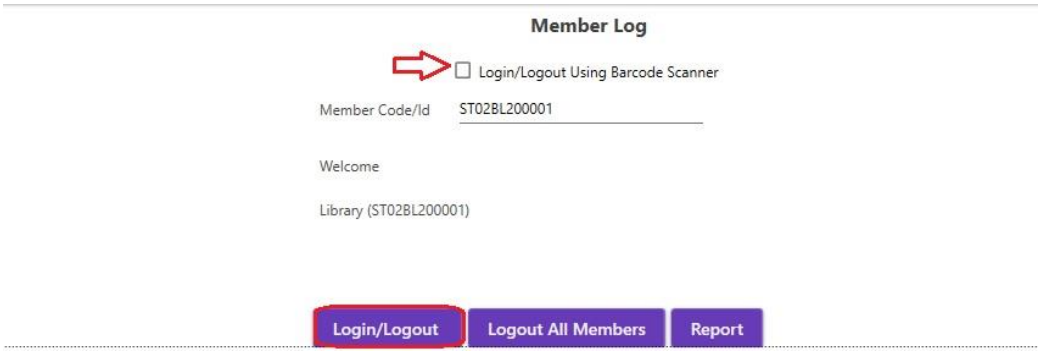
Option to directly import .csv file which contains accession numbers of items:

- Select file to import Accession Numbers → Browse → Import → Click on Import accession number → Save.

Reports:

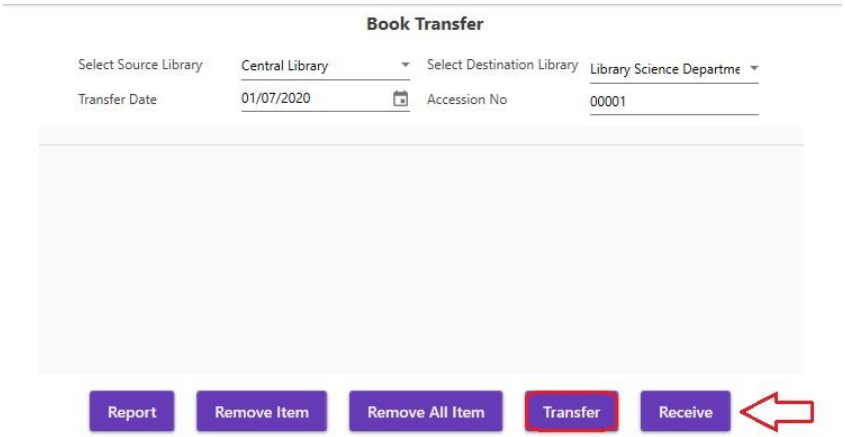
- Mismatch Asscession
- Mismatch Status
- Mismatch Location
- Available Items.

Transaction→ Member Login:



- Add Member Code/ID→ Login/Logout.
- Reports can be generated either by date, Member Code, Member ID, most frequently users, and current logged in members.

Transaction→ Book Transfer:

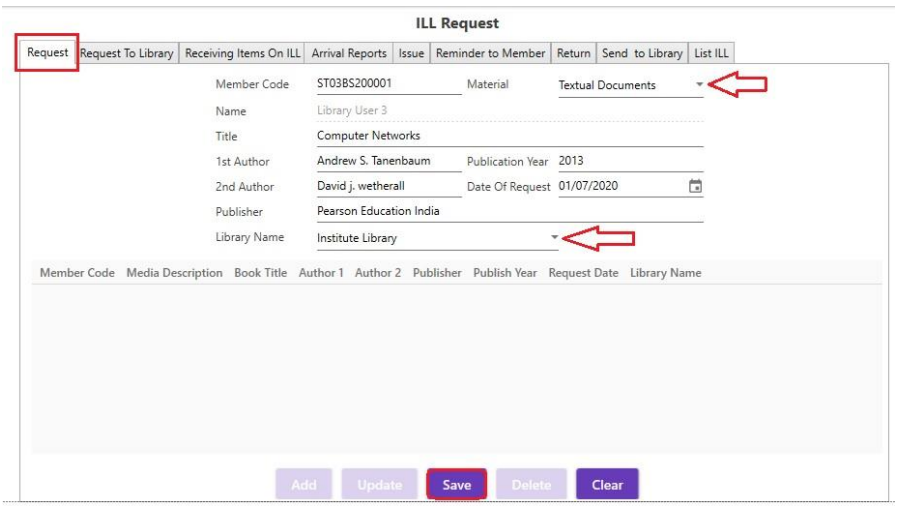


- Select Source Library → Select Destination Library → Transfer Date → Add Accession Number → Click on Transfer button.

Inter Library Loan (ILL):

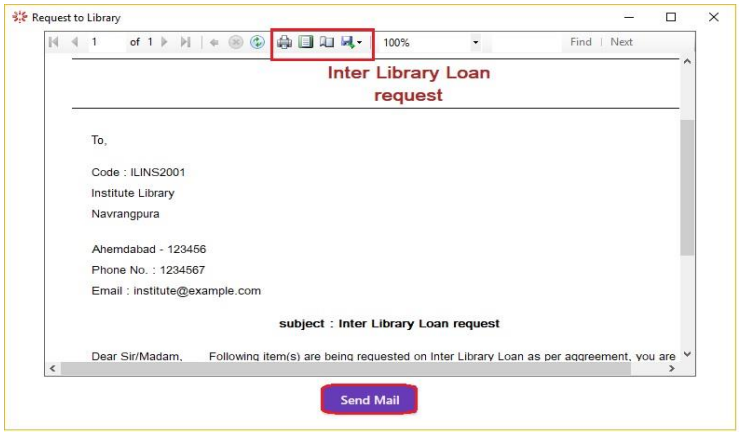
Inter Library Loan (ILL)→ ILL Borrowing Book:

ILL Borrowing Book → Request:



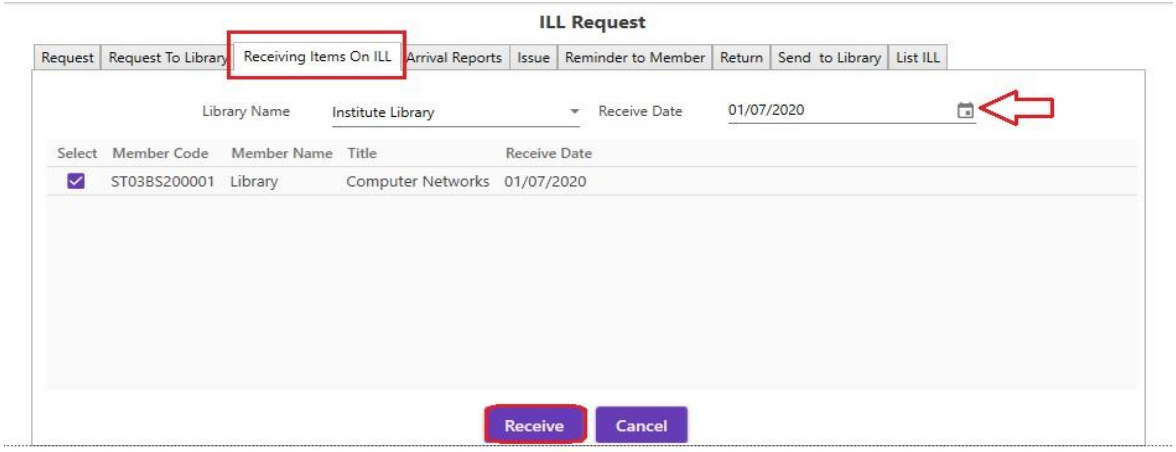
- Request→ Add Member Code → Select Material → Enter Title → Author → Publisher → Publication Year → Date of Request → Select Library Name→ Save.

ILL Borrowing Book → Request to Library:



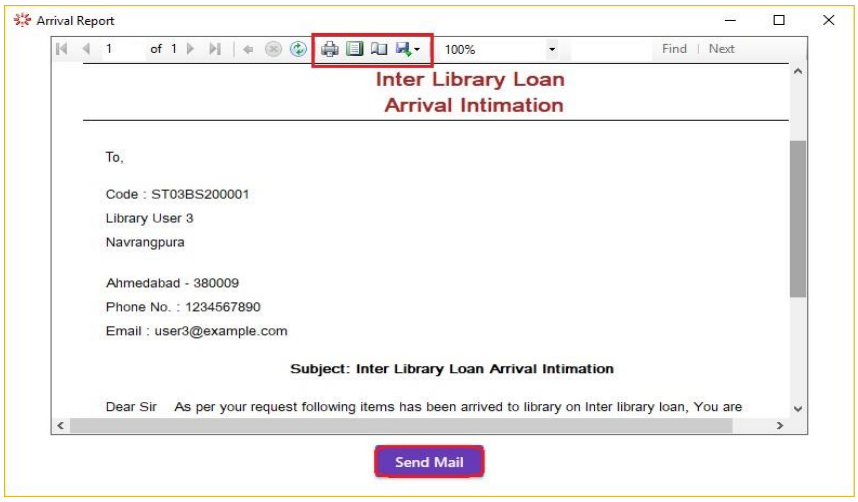
- Select Library name → Show.

ILL Borrowing Book → Receiving Items on ILL:



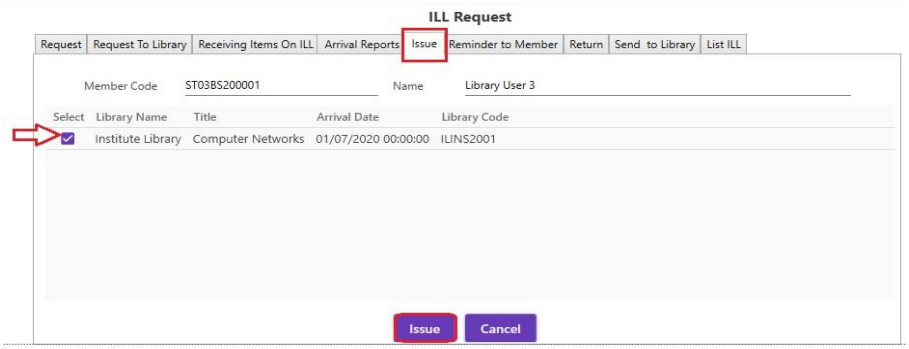
- Select Library Name → Receive Date → Select the title in the check box → Receive.

ILL Borrowing Book → Arrival Reports:



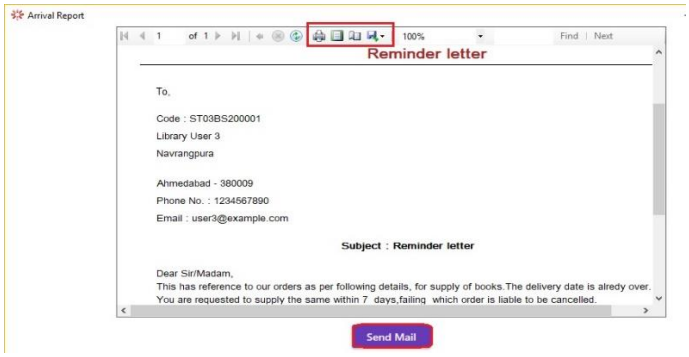
- Select the Library Name → Show.

ILL Borrowing Book → Issue:



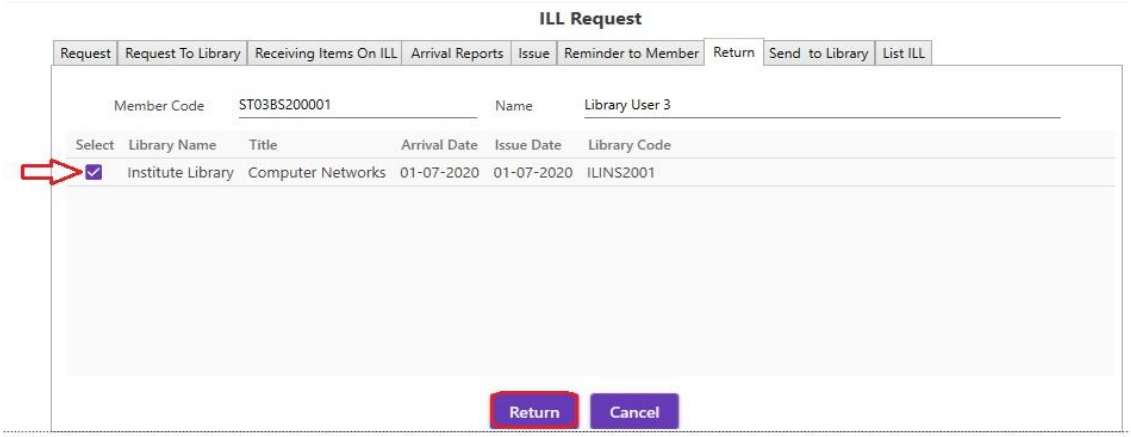
- Issue → Add Member Code → Select Title in the check box → Issue.

ILL Borrowing Book → Reminder to Member:



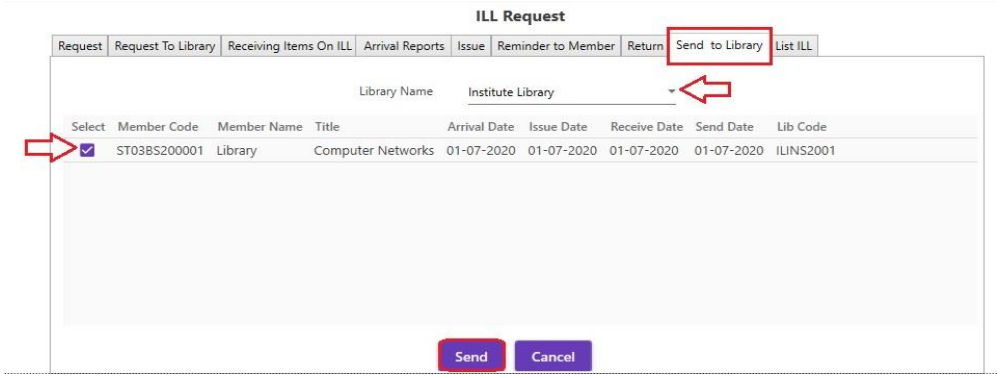
- Reminder to Member → Add Member Code → Show.

ILL Borrowing Book → Return:



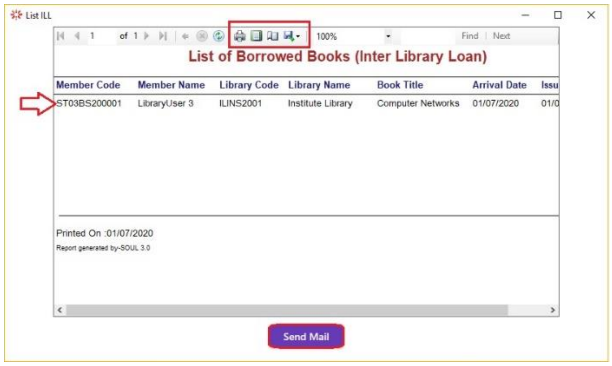
- Return → Add Member Code → Select the title in the check box → Return.

ILL Borrowing Book → Send to Library:



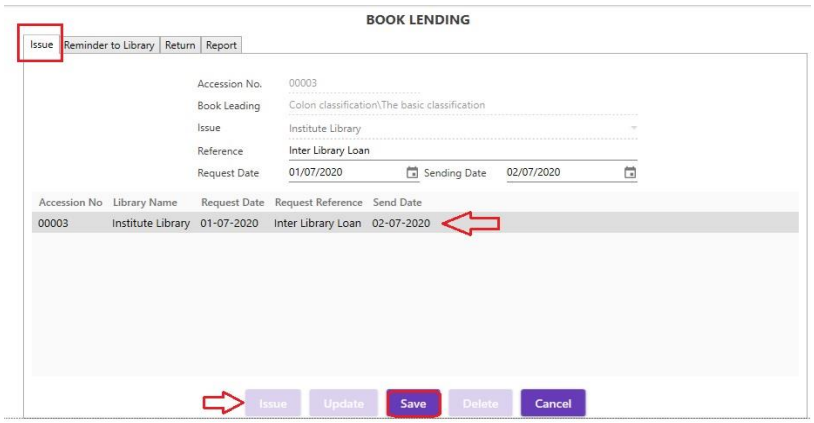
- Send to Library → Select Library Name → Select the Title in the check box → Send.

ILL Borrowing Book → List ILL:



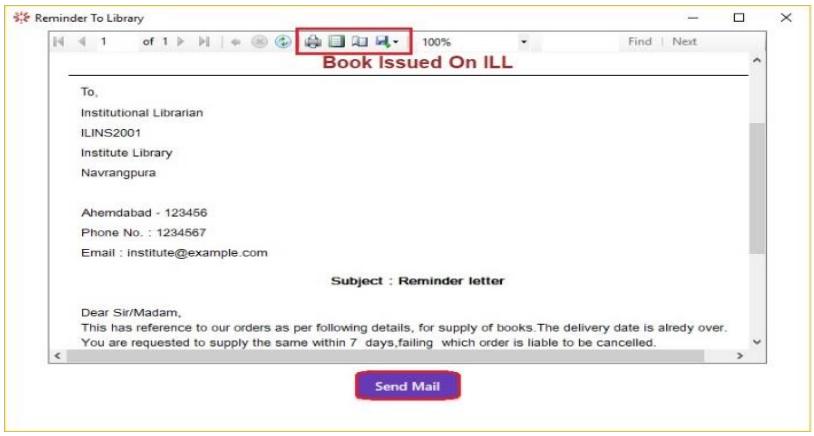
- List ILL → Issue date from → Issue date to → List Items.

Inter Library Loan (ILL) → ILL Lending Book:
ILL Lending Book → Issue:



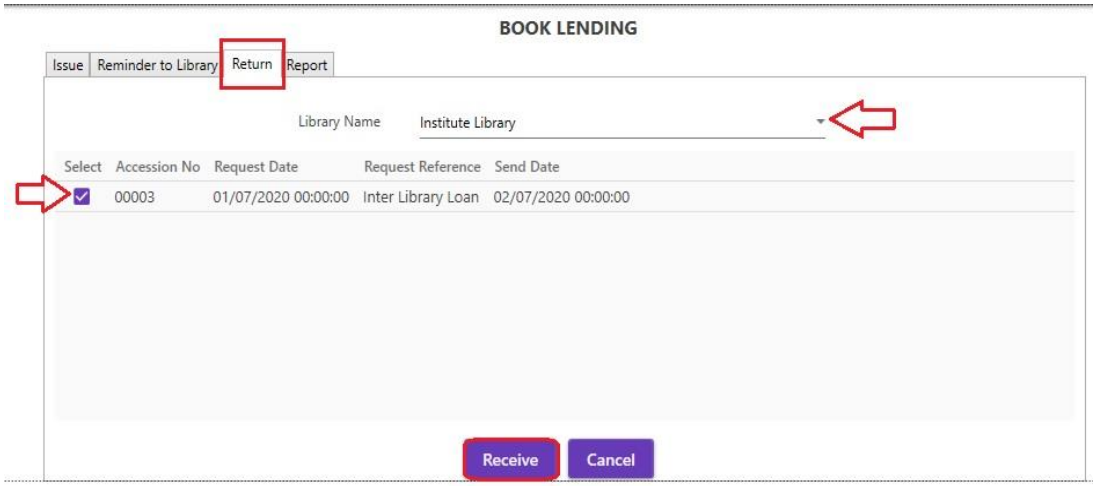
- Issue → Add Accession Number → Issue (Select the library from dropdown) → Give Reference → Request Date → Sending Date → Save.

ILL Lending Book → Reminder to Library:



- Reminder to Library → Select Library Name → Show.

ILL Lending Book → Return:



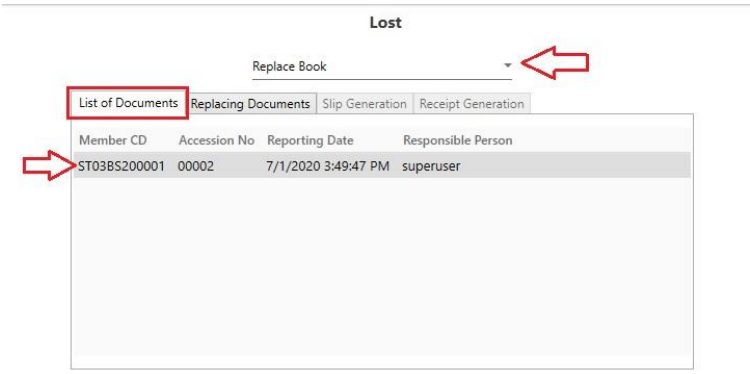
- Return → Select Library Name → Receive.

ILL Lending Book → Report:

- Report → Request Date from → Request Date to → List ILL.

Circulation -> Maintenance:

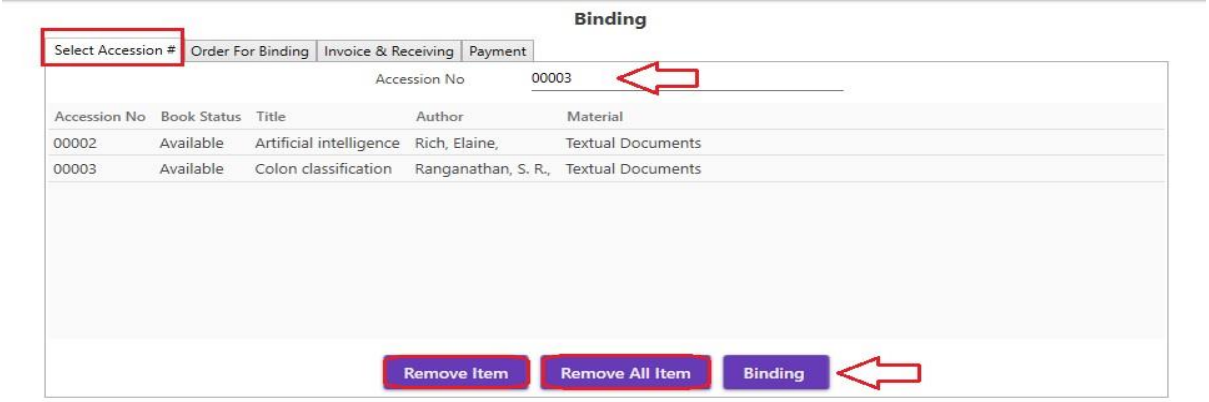
Maintenance → Lost:



- Lost → Select from dropdown Replace/Amount Recovery:
- If Replace Book→ Replacing Document → Select the Accession number to be replaced → Replace.
- If Amount Recovery → Select the title lost → Slip Generation → Slip Number→ Member Id→ Accession Number → Fine → Recovered → Payment.
- Receipt Generation → Payment.

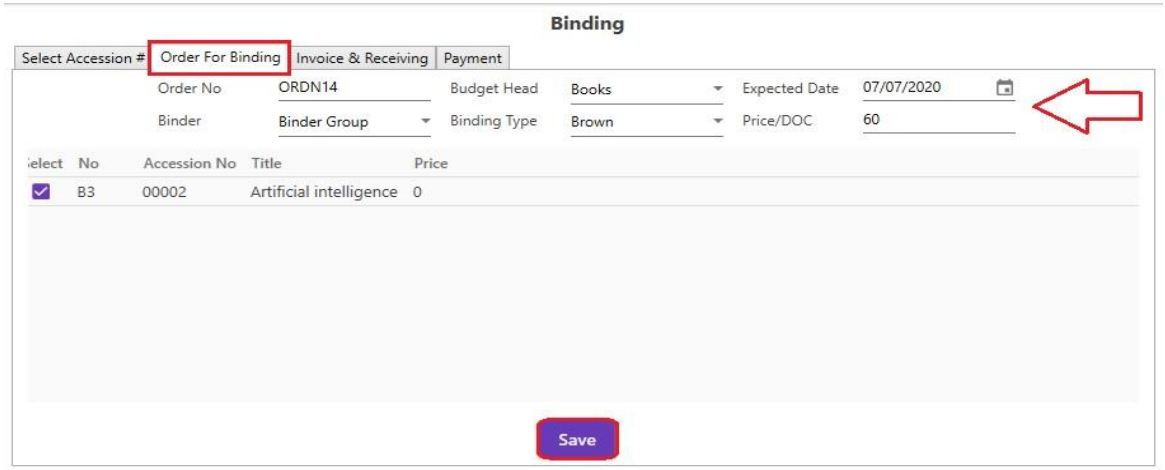
Maintenance → Binding:

Binding → Select Accession:



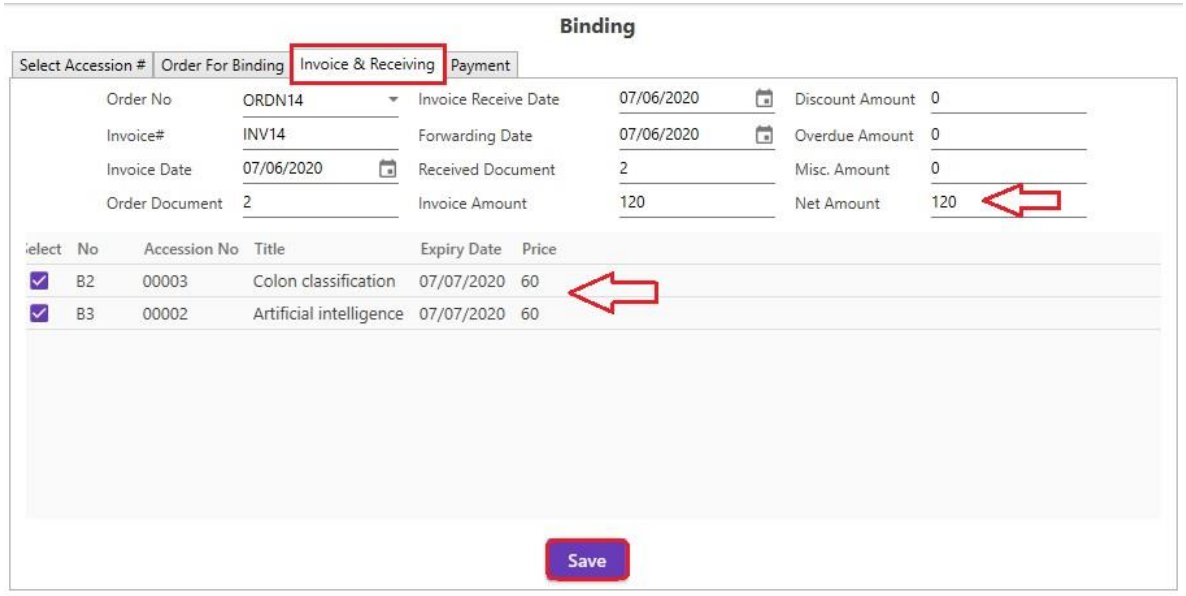
- Select Accession → Add Accession numbers → Click on Binding button.

Binding → Order for Binding:



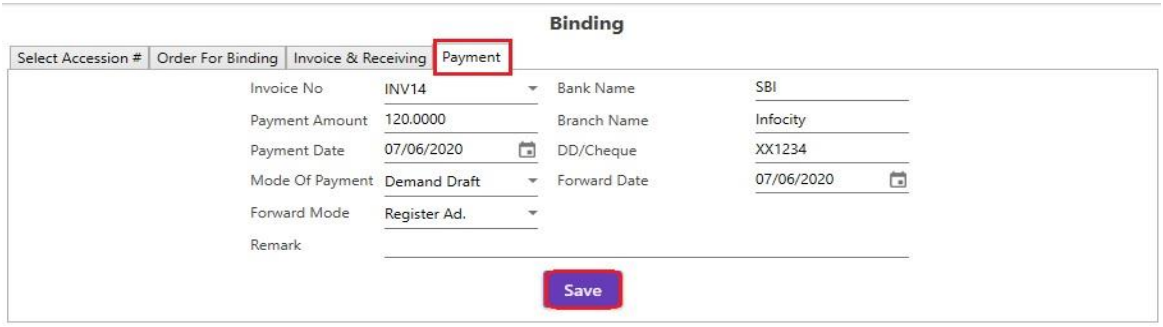
- Order for Binding → Assign Order Number → Select Binder → Budger Head → Binding Type → Expected Date → Mention Price per document → Select the title in the check box → Save.

Binding → Invoice & Receiving:



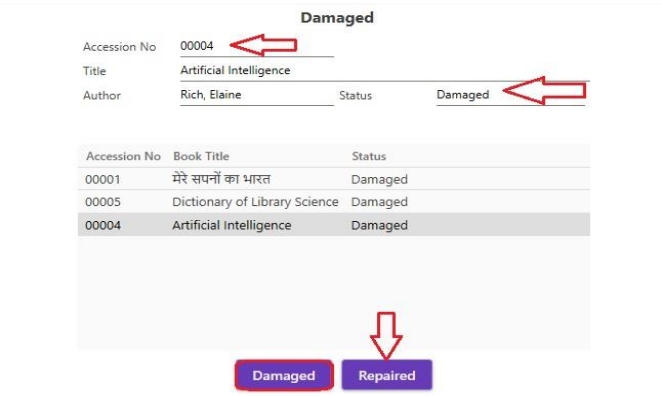
- Invoice & Receiving → Select Order Number → Add Invoice Number → Invoice Receiving Date → Forwarding Date → Received Document → Invoice Amount → Discount Amount → Overdue Amount → Miscellaneous Amount → Net Amount → Select the titles → Save.

Binding → Payment:



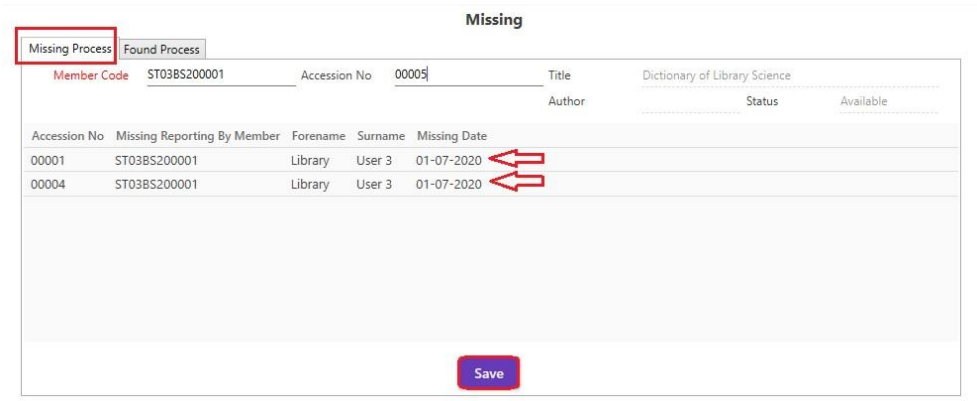
- Payment → Select Invoice number → Payment Amount → Mode of Payment → Forward Mode → Bank Name → Branch Name → DD/Cheque number → Forward Date → Save.

Maintenance → Damaged:

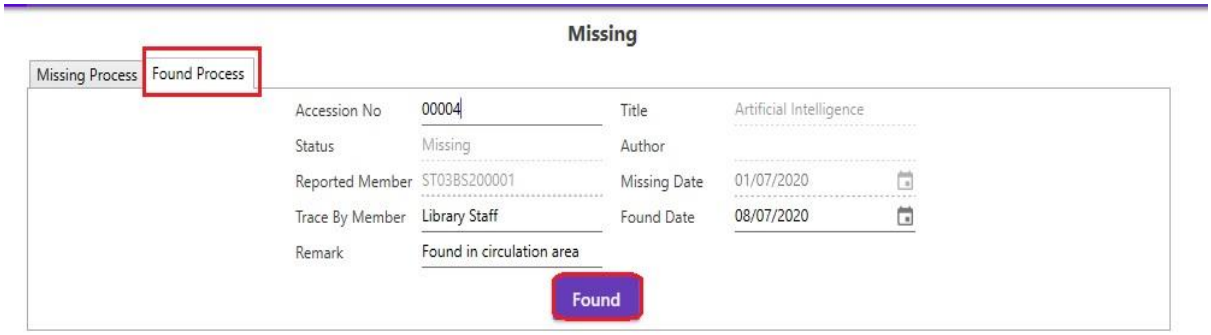


- Damaged → Enter Accession number → Click on Damaged.
- To Re-introduce for circulation → Select the title → Click on Repaired.

Maintenance → Missing:

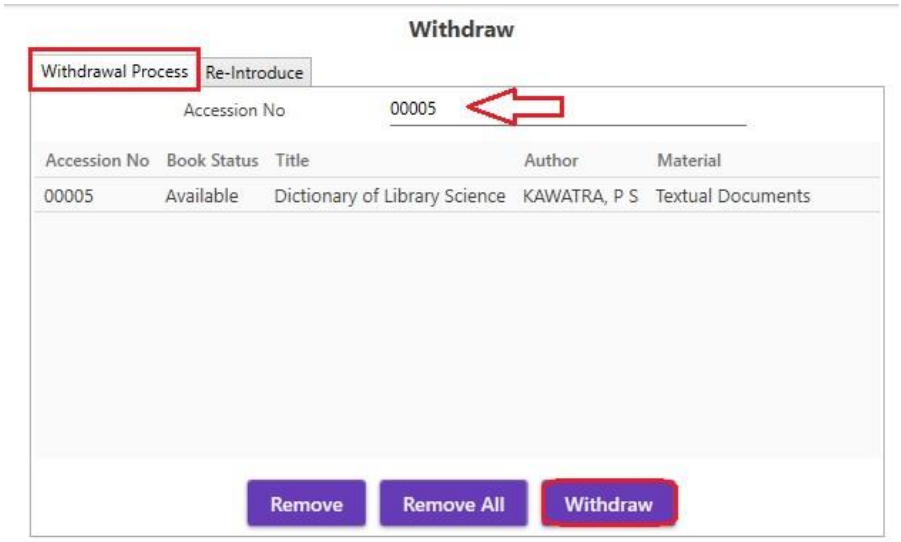


- Missing Process → Add Member Code → Accession Number →Save.

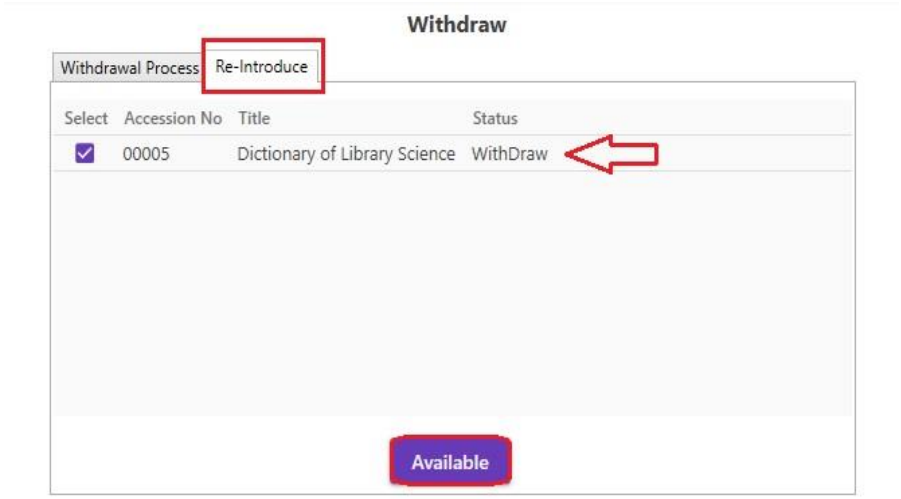


- Found Process → Add Accession Number → Click on Found button.

Maintenance → Withdraw:



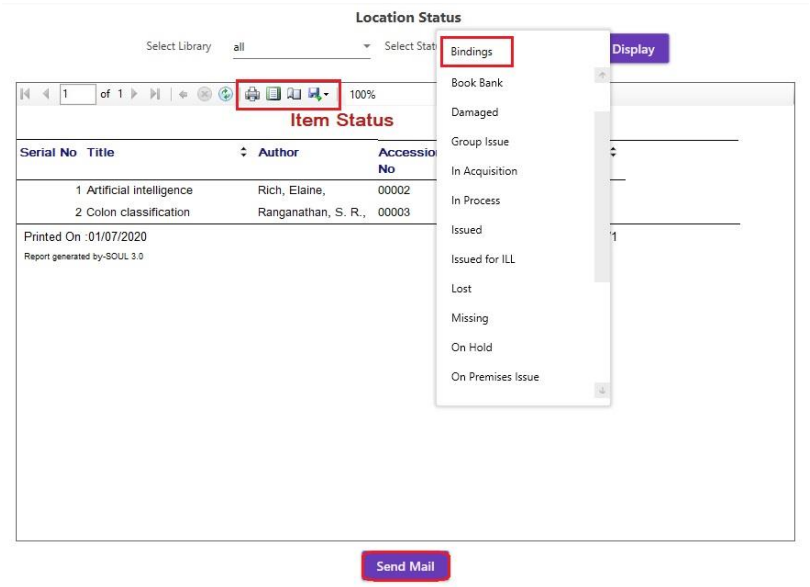
- Withdrawal Process → Add Accession Number → Click on Withdraw button.



- Re-Introduce → Select the Title → Click on Available button.

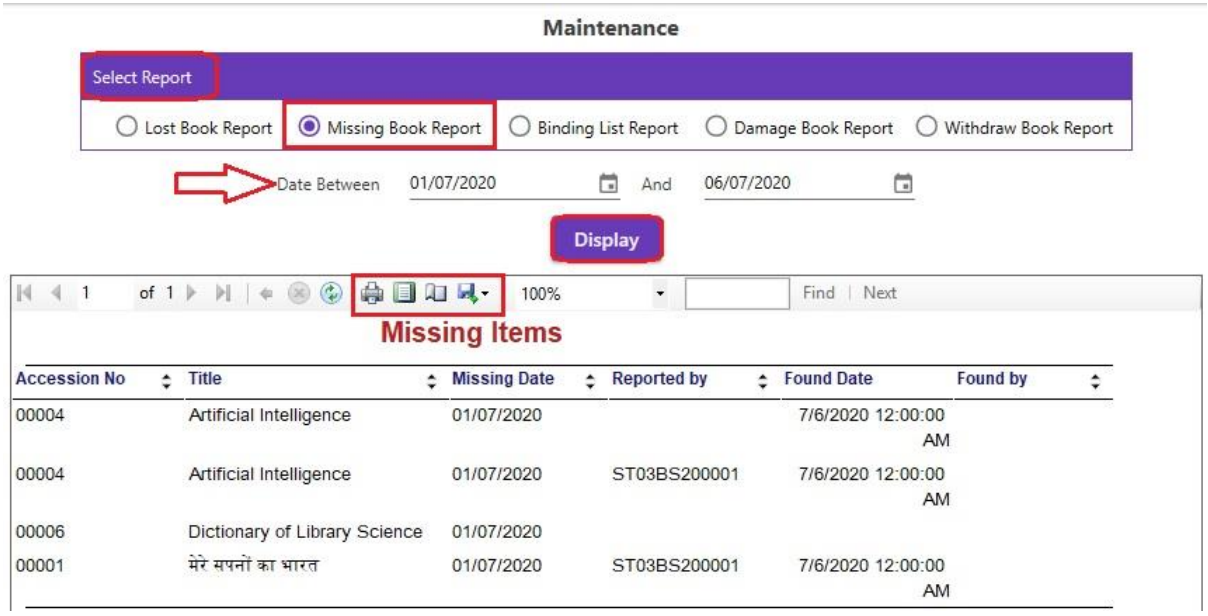
Maintenance → Reports:

Location Status:



- Location Status → Select Library → Library Status → Display.

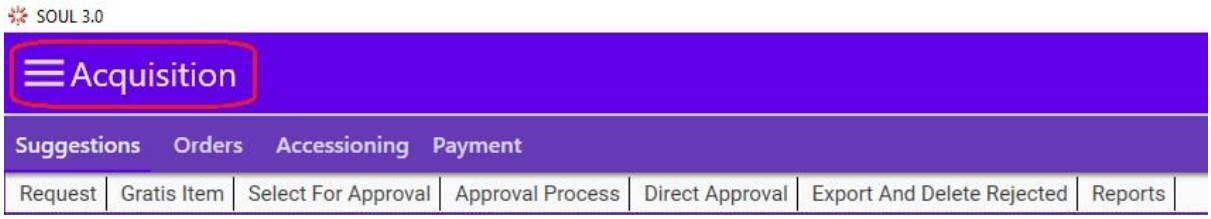
Maintenance:



- Maintenance → Select desired report option → Enter Date Between → And → Display.

----------XXX----------

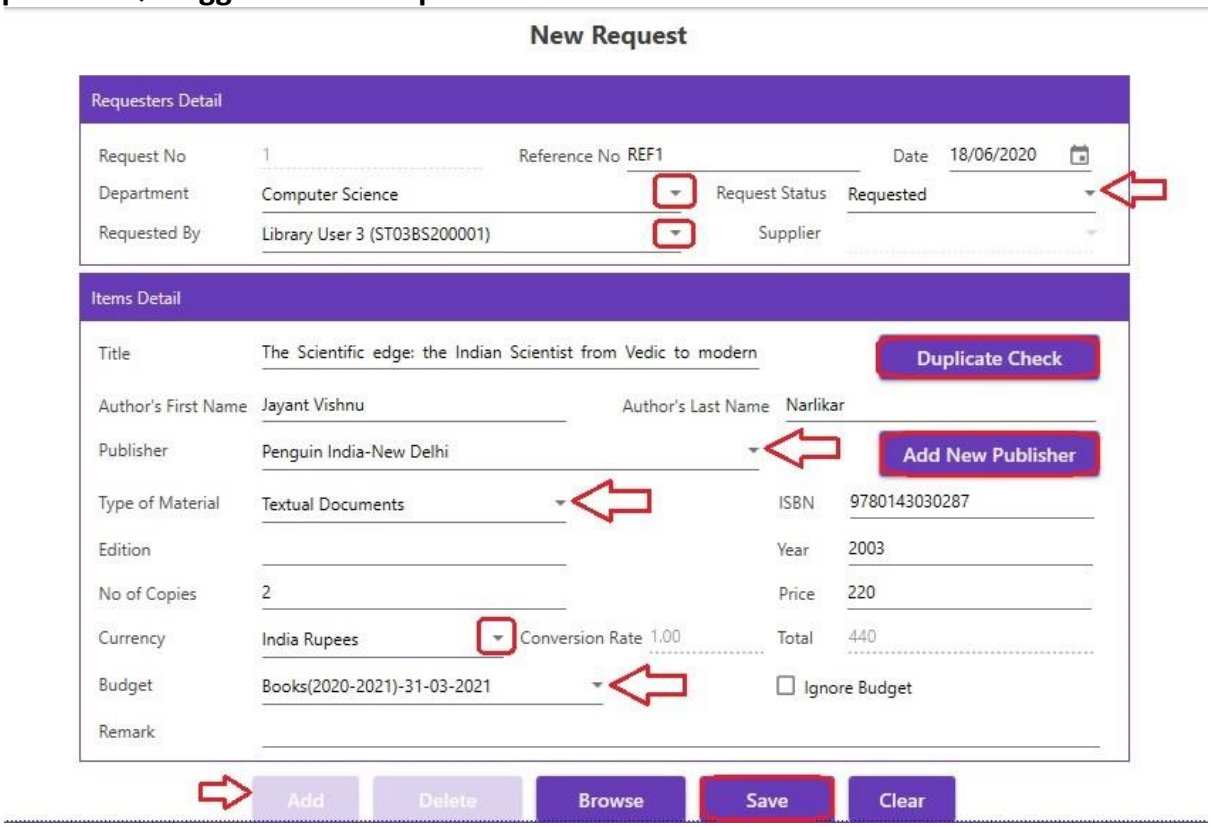
SOUL 3.0: Acquisition Module



Click on the <Acquisition> module. Select the first option <Suggestions> Request:

This Sub-menu deals with suggestion management consisting of request processing and the approval of the requested item.

Acquisition → Suggestions-> Request



All fields in red font are mandatory.

Requester's Detail:

- Give Reference Number-> select department from the dropdown menu -> select requested by from dropdown menu.

Items Details:

- Add Title-> Author's first name -> Author's last name i.e. surname -> Select Publisher from dropdown menu -> Select Type of material from dropdown menu -> ISBN -> Edition -> Year of Publication -> No. of Copies -> Price -> Currency -> Select Budget from dropdown menu -> Remarks if any -> Save.

Select for Approval:

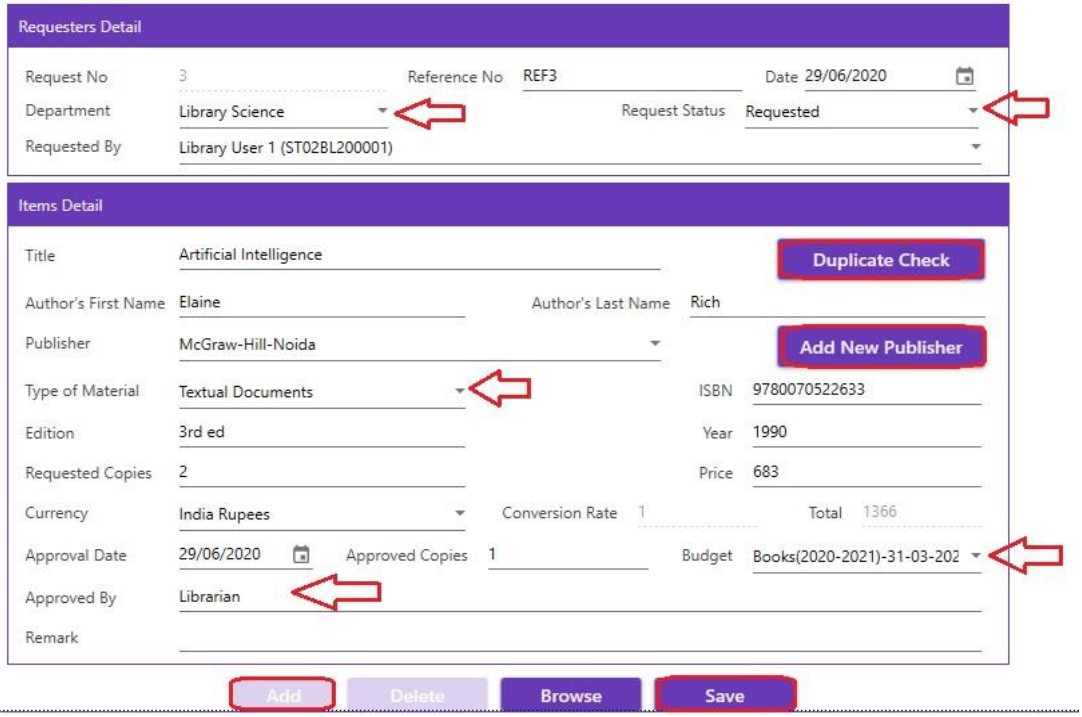
- Select the titles to be approved by opting to go either by Department wise or budget wise otherwise 'All' and save.

Approval Process:

- Select Filter option → Edit the no. of copies to be approved → Click Approve/Reject → Enter approving committee & remarks → Save.

Direct Approval: (If you want to ignore the above steps) There are some occasions when routine Approval procedure is bypassed based on recommendations committee.

Direct Approval



- Select Department & requester → Enter Book details → Save.

Export & Delete Rejected

- Select the date upto which request is to be deleted → Search → Export & Delete.

Letter for Approval

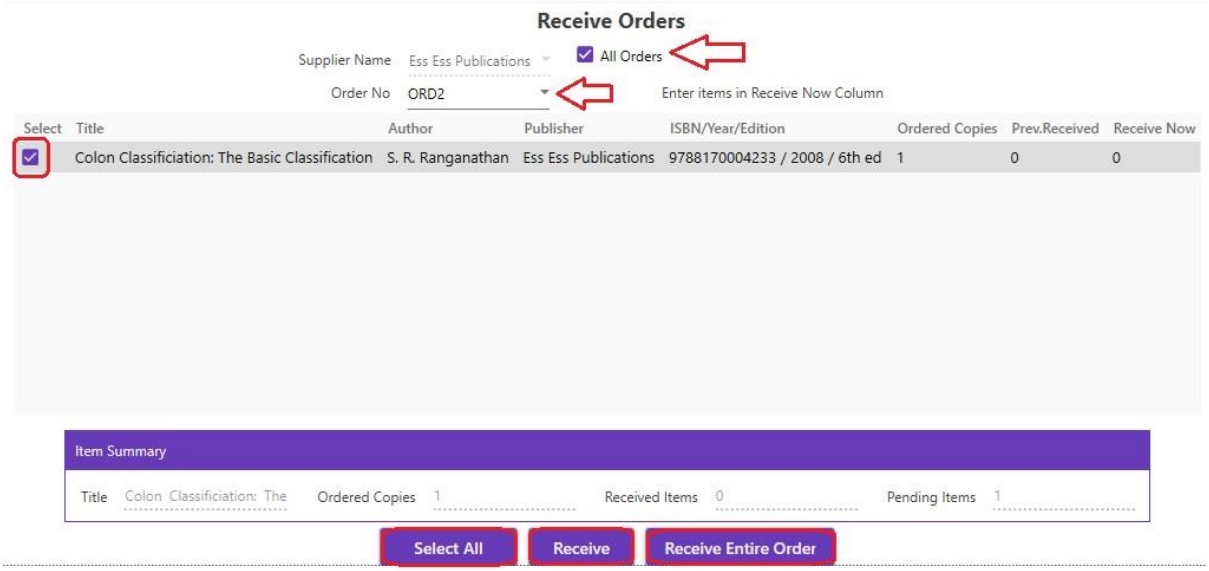
- Generate letter for requesters whose books has been approved.

Acquisition → Orders

- **New Order** → Enter Order No (If Auto Letter No. Is not active) → Select Supplier → Edit order date & expected date → Add Item → Select filter option → Select book (clicking on check box on left) → Save (from Add Item) → Save
- **Cancel Order** → Select Order Number-> Date → Select Title → Cancel Order

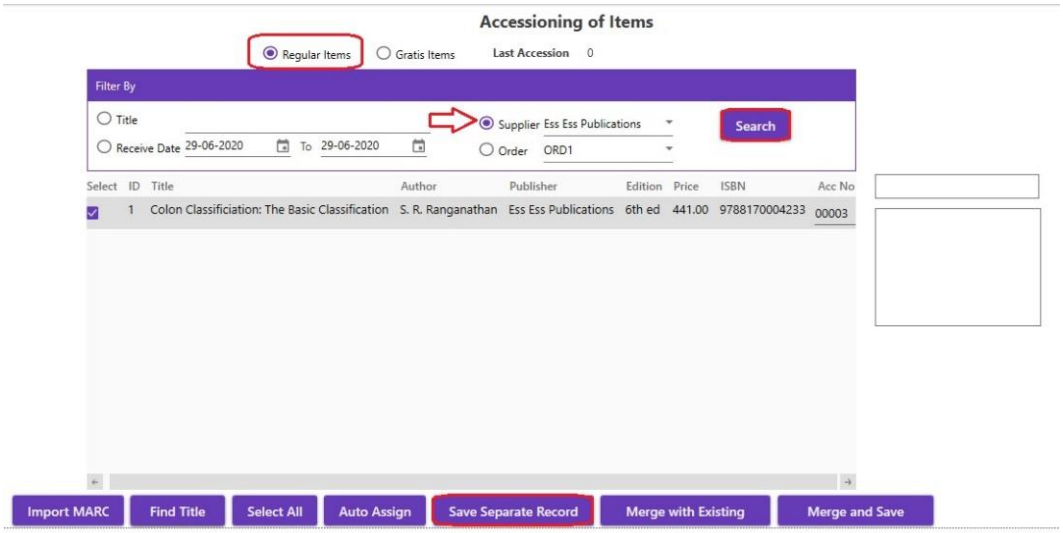
- ## Acquisition → Accessioning

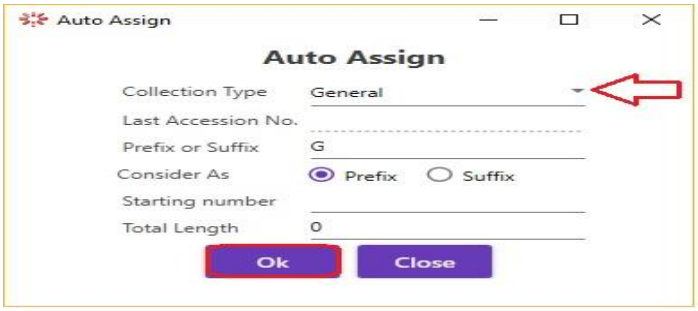
Receive order:



Select Supplier → Select order no → Select the book → Enter the number of books to be received in the **Receive Now** column → Receive.

Accessioning of Items:



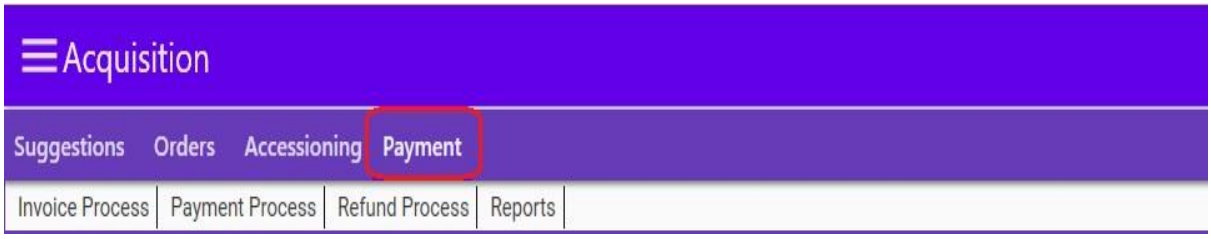


- Regular Items;
- Select from different filter options to view the books
- Select Supplier -> Order Number -> Date -> Select the Title/titles -> Assign accession no. in the last column individually or
- Auto assign-> Collection type -> Prefix/Suffix -> Starting no. -> Ok -> Merge and Save -> Ok-> Merge and Save.

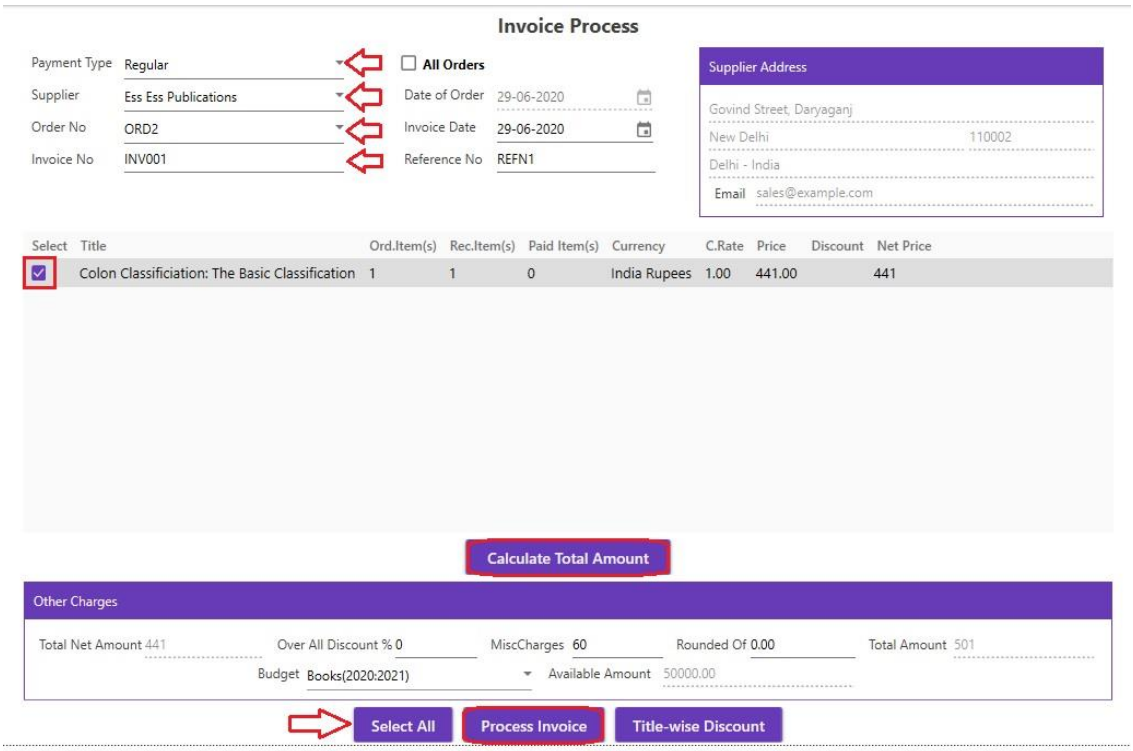
Other Options:

- Import MARC → Import a MARC 21 record for a book
- Find Title → Search for the book in the catalogue → Double click the title → Merge with Existing (to add accession no. To the existing record)
- Merge & Save → To create a single record for all the selected books with different accession number.

Acquisition → Payment

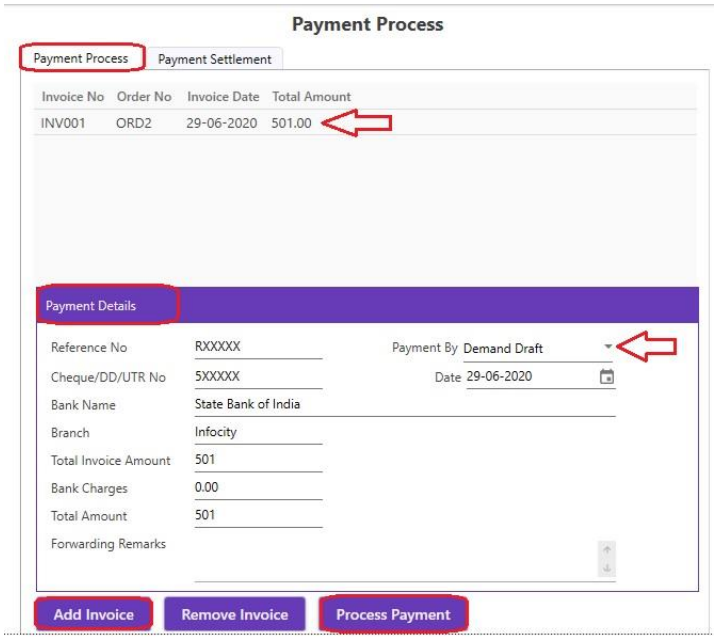


Invoice process:



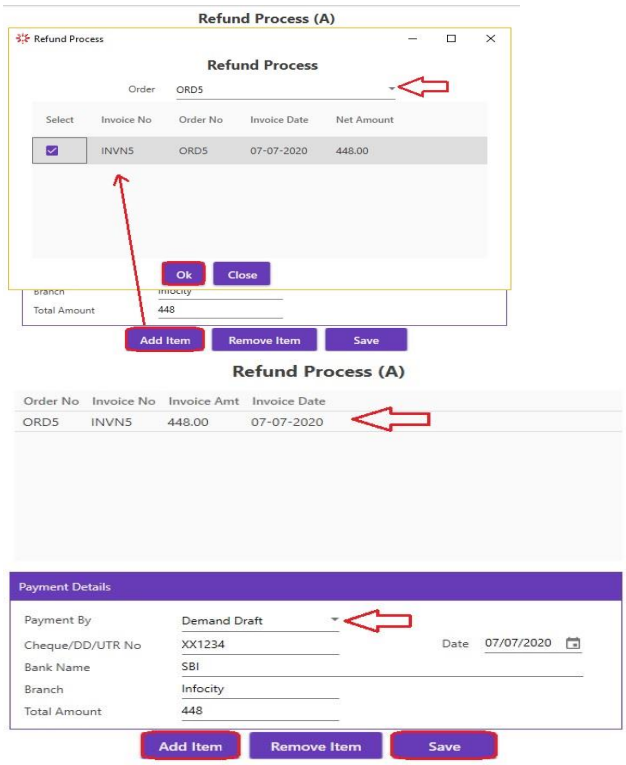
- Payment type (Regular) -> Select Supplier from drop down -> Order no. from drop down -> Mention Invoice no. -> Date of Order -> Invoice Date -> Reference No.
- Select Book → Double click on left of book to edit actual price;
- Discount: Either Discount title wise-> Feed rate of percentage -> Save or directly mention the rate of percentage in Discount column
- Click on Calculate total Amount -> Enter details of overall discount etc (if not given titlewise) -> Process Invoice -> Ok.

Payment Process:



Payment process -> Add Invoice -> Select the Invoice no -> Add -> Select Payment by from drop down -> Feed Reference No. -> Cheque/DD/UTR No. -> Bank Name -> Branch -> Payment Date -> Process payment -> Ok.

Refund process:



→ Add item → Select order no → Select invoice no → click OK → Enter payment details → Save

Direct Order:

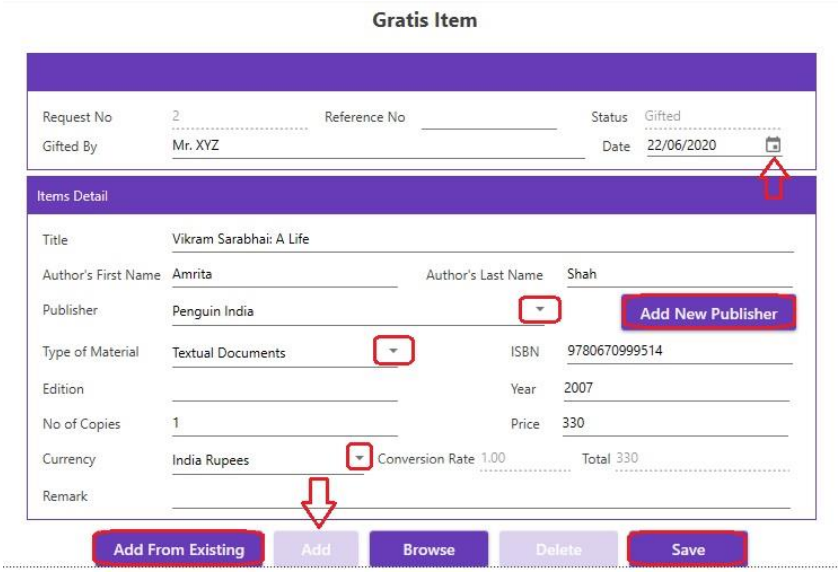
(For ignoring suggestion menu) → Enter order No & select Supplier → Add item →Enter the requested book details same as done in New Request form → Save (In the Direct order form) → Save.

Report:

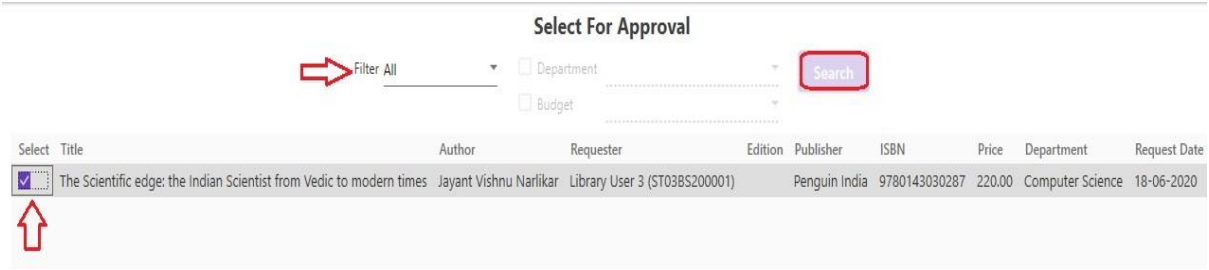
- **Purchase Order** → Orders can be generated with order number/date or vendor.
- **Reminder Letter** → Report can be generated either by supplier or expected date of receipt of item(s).
- **Order Report** → Orders can be generated according to status i.e. All orders Generated orders, completed orders, Cancelled orders, Partial orders as well as supplier wise list.

Gratis Item:

Many times libraries are receiving documents as donations/gifts. These documents are known as 'Gratis' documents.



Gratis Items → Enter details of book & gifted by → Save



Select for Approval→ Search the title by using different parameters→Select the title by clicking the check box→Save.

Approval Process:

'Approval Process' consists of two steps for each title:

[i] Approved budget selection and no. of copies approved and

[ii] Approved by (either a Library Committee meeting date, etc).

Click the box against titles(s) approved and fill in the approval copies.

Fill up details like 'Approved By' -> click 'Approve' – Pop-up Box titled 'Approved By' will appear. Fill up appropriate details along with the 'Remark' – meeting date / name of the officials etc. and click 'Approve' and Save.

Accessioning:

Select Gratis Items→ select the titles→ assign accession number/auto assign→merge and save.

Report:

Accession Report: Tick the required fields in the check box→ select optional parameters→Display.

Barcode: Select option from dropdown menu→ Header→ Select label from drop down menu→ Display.

The reports can be exported to Excel, Word and PDF formats.

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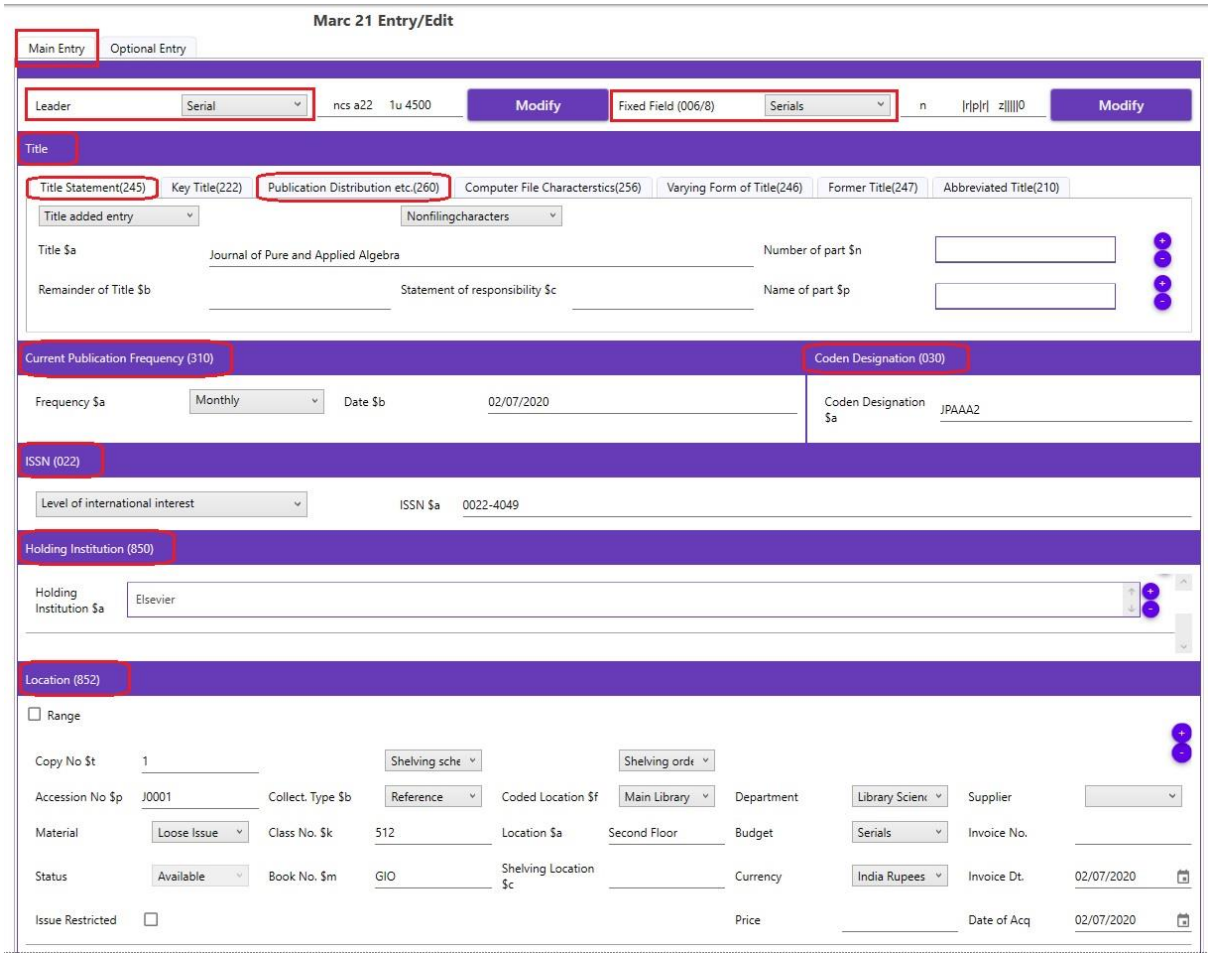
SOUL 3.0: Serials Control Module

Titles→ MARC21 Entry/Edit:



Main Entry:

- **Leader** → Serials;
- **Fixed Field** → Serials;
- **Title Statement** → Enter Title → Remainder of Title → Statement of Responsibility → Number of Part → Name of Part;

- **Current Publication Frequency → Frequency → Date → Coden Designation → ISSN → Holding Institution;**
- **Location (Tag 852):** Add Accession → Material → Collection type → Class number → Coded Location→ Shelving location → Shelving location→ Department →Budget → Currency →Price→ Supplier → Invoice number → Invoice date → Date of acquisition. If the title is restricted for circulation, click the check box;

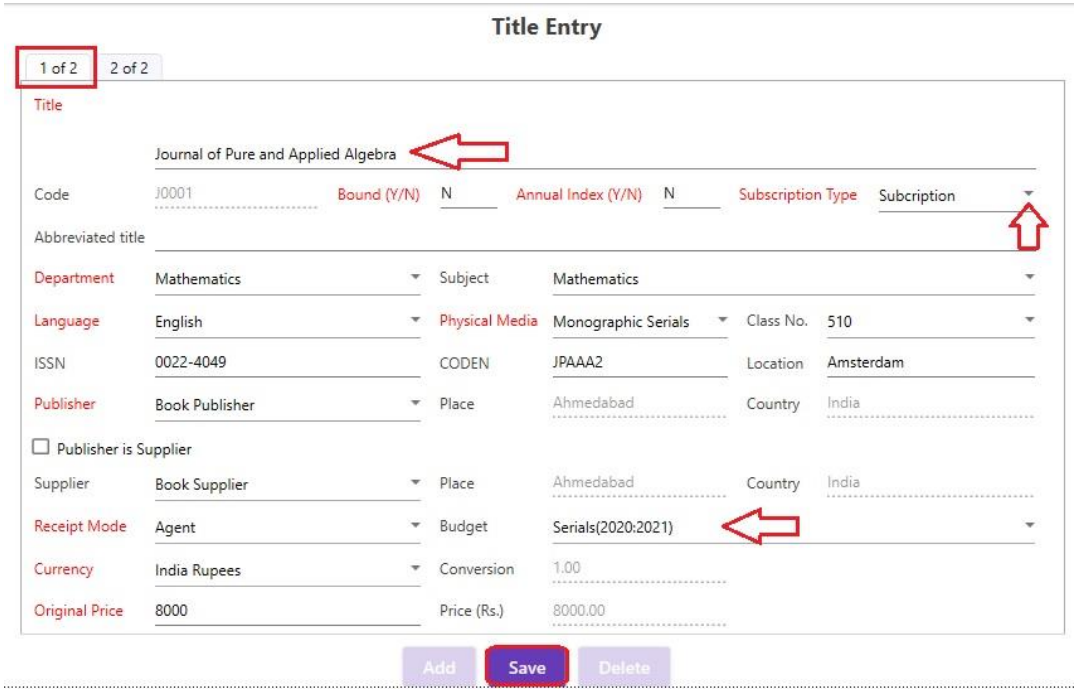
Optional Entry:

- Subject added entry (6xx) Uncontrolled term (653): Add keywords instead of subject headings. To add multiple keywords click on + sign;
- URL (856): Enter fully qualified URL specifying the protocol (i.e. http://, https://, ftp: etc) which will enable users to directly access that resource by clicking in OPAC;
- Save the record.

Edit Records:

- Click Edit button → Select either Record ID, Range of Records, A particular accession number, By User Name, Range of Date Entered as well as by searching through OPAC by clicking 'Search' radio button.

Titles → Title Entry:

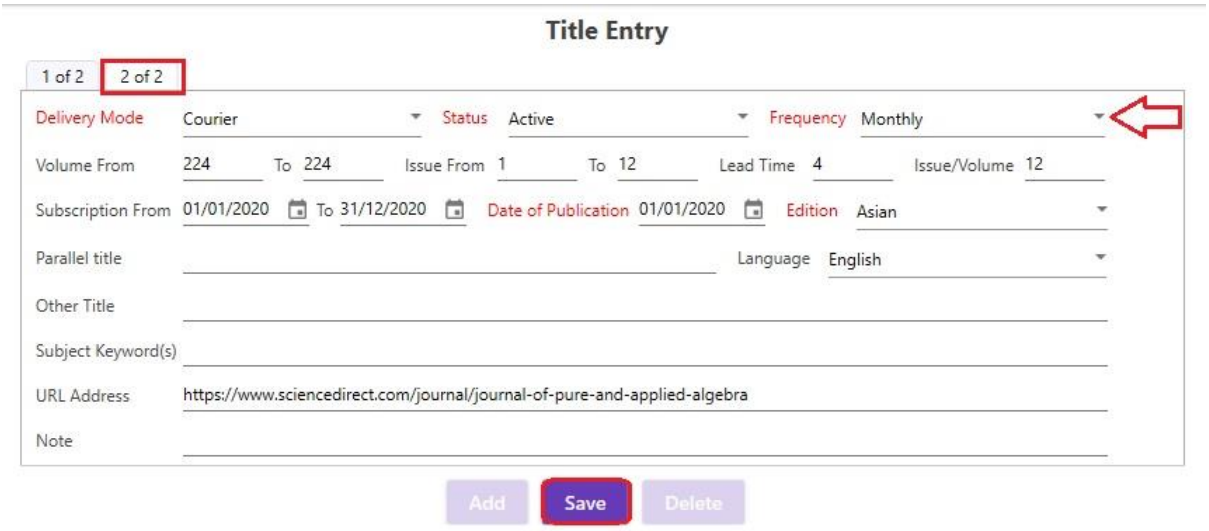


1 of 2: All the field names with red font are mandatory:

- Enter Title → Bound (Y/N)→ Annual Index (Y/N) → Select Subscription type → Abbreviated title → Department → Subject → Language → Physical Media → Class Number → ISSN → Coden → Location → Publisher → Place →

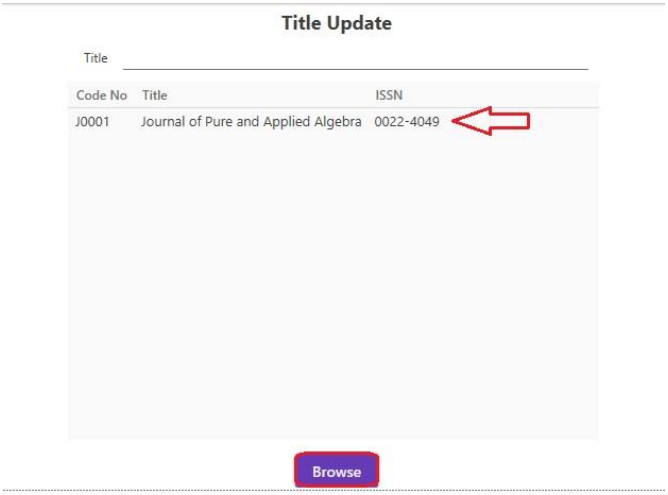
Country → Supplier → Place → Country → Receipt Mode → Budget → Currency → Original Price.

2 of 2:



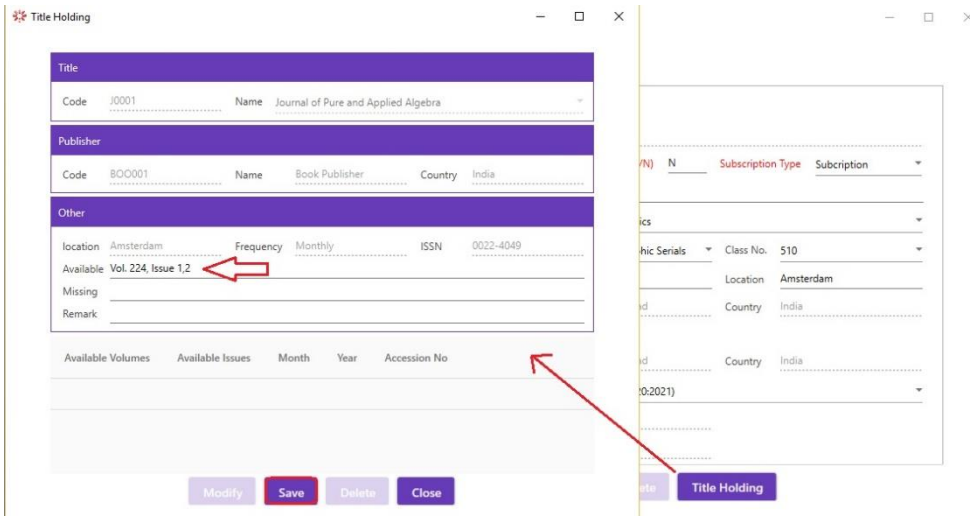
- Delivery Mode → Status → Frequency → Volume From → To → Issue From → To → Lead Time → Issue/Volume → Subscription From → To → Date of Publication → Edition → Parallel Title → Language → Other Title → Subject Keywords → URL Address → Note → Save.

Titles → Title Update:



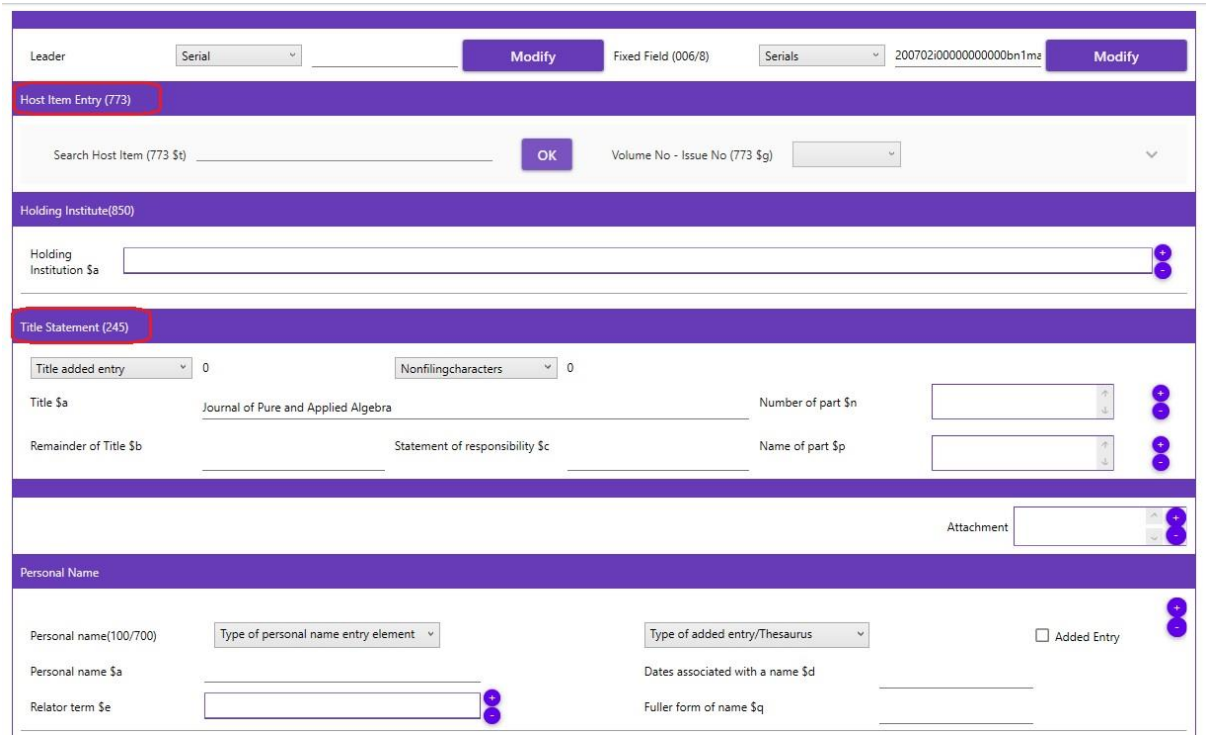
- Title update → Browse title → Double click on the title → Click on Modify button → Edit the required information →Save.

Title → Title Update → Title Holdings:



- Title Update → Title Holdings → Add Title → Publisher → Add Available → Missing → Save.

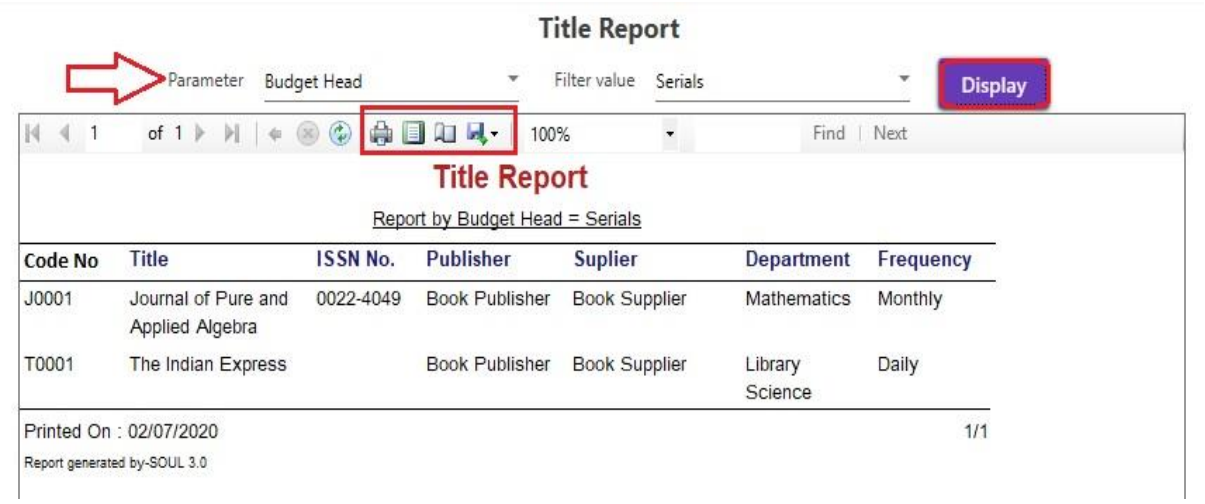
Titles → Article Indexing:



- Article Indexing → Leader select Serial → Fixed field select Serial → Search Host Item → OK→ Select Volume Number & Issue number from drop down → Holding Institution → Title → Personal name → Relator term → URL → Note → Save.

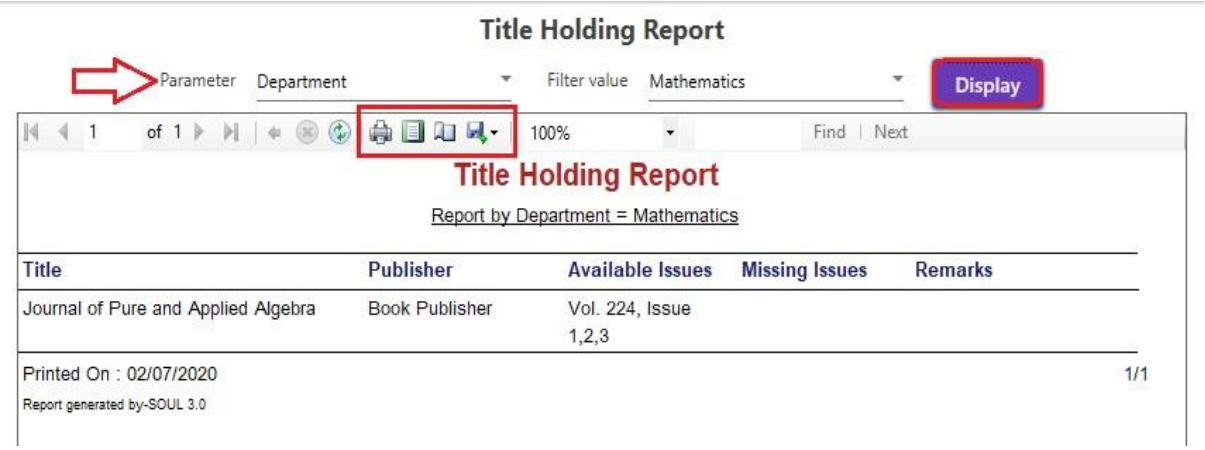
Title → Reports:

Reports → Titles Report:



- Reports → Title Report → Select Parameter → Select Filter Value → Display.

Titles → Reports → Titles Holding Report:

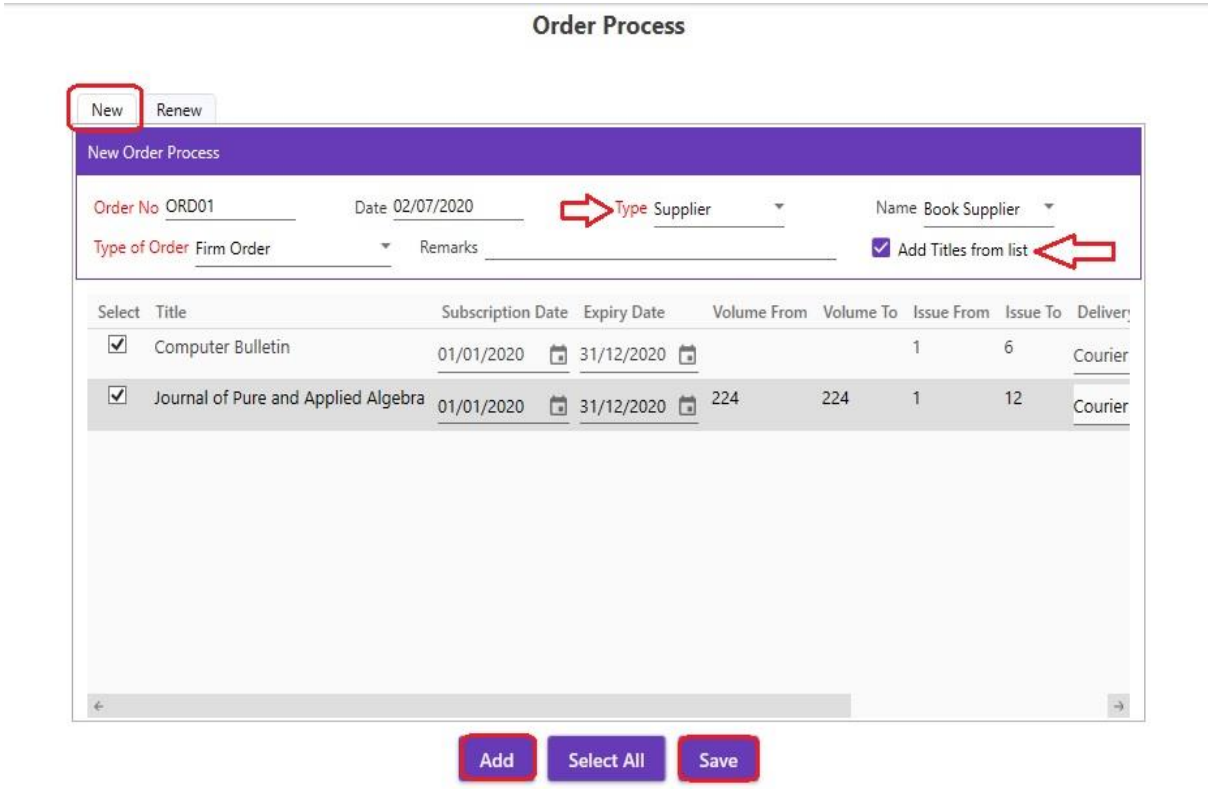


- Reports → Titles Holding Report → Select Parameter from dropdown → Filter Value for dropdown → Display.

Subscription:

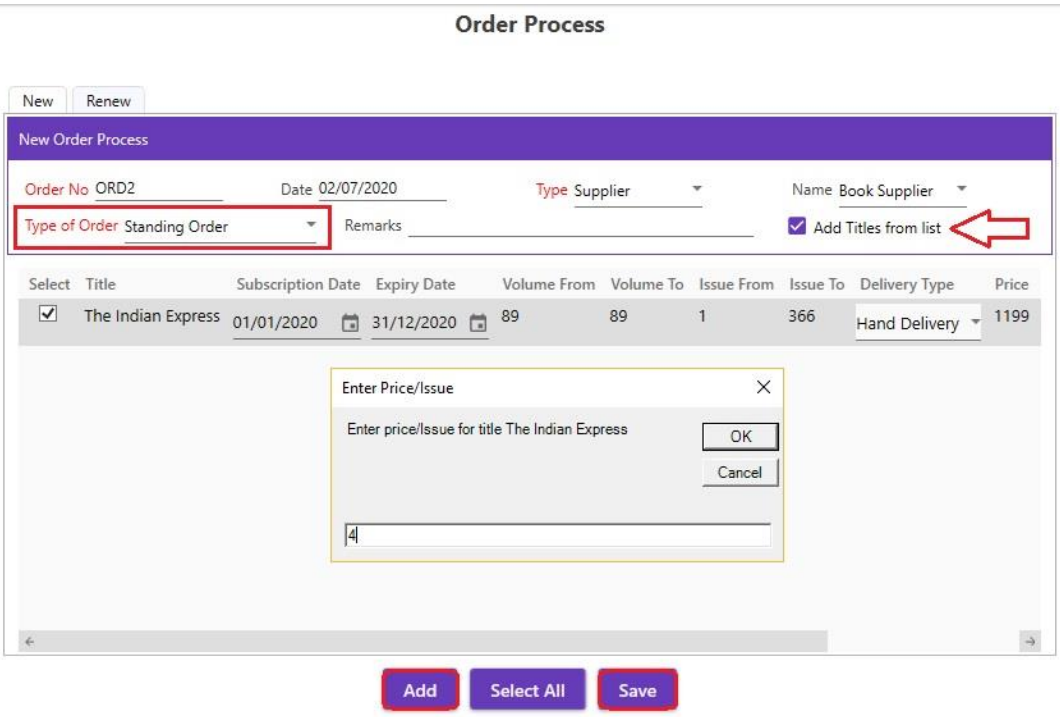
Subscription → Order Processing:

Firm Order:



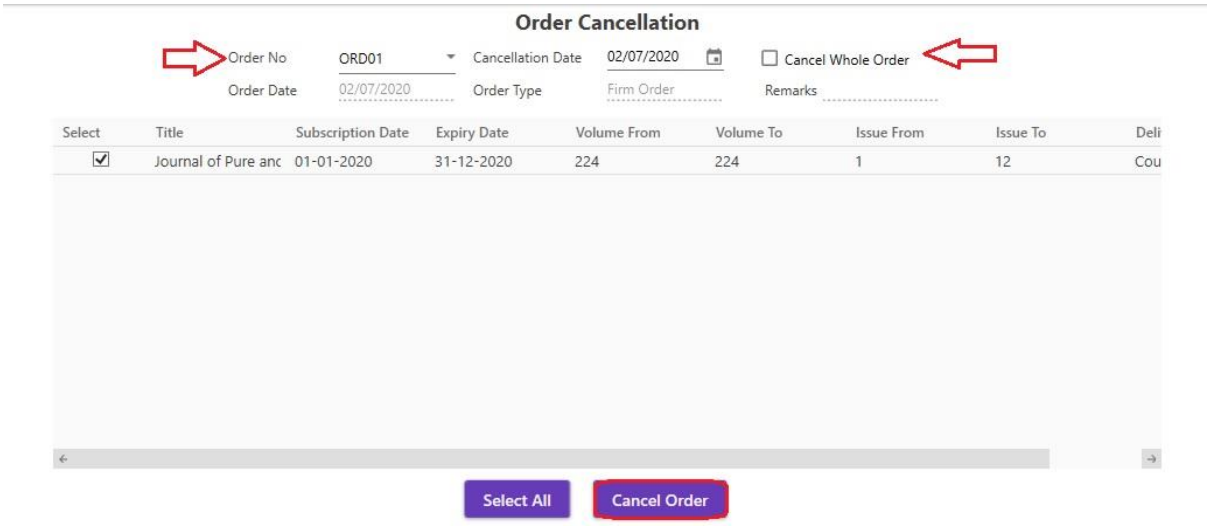
- Order Process → New → Order Number → Date → Select Supplier/Publisher → Select name of the Supplier/Publisher from dropdown → Select Type of Order –Firm Order → Click on check box – Add titles from list → Add → Select the title → Pick → Select Delivery type → Select the Title →Save.

Standing Order:



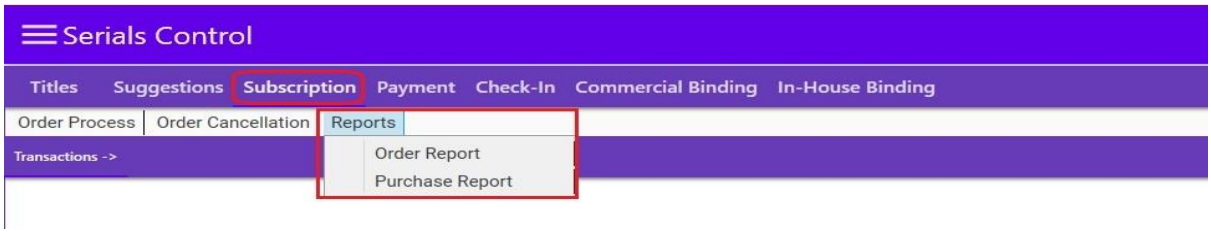
- Order Process → New → Order Number → Date → Select Supplier/Publisher → Select name of the Supplier/Publisher from dropdown → Select Type of Order –Standing Order → Click on check box – Add titles from list → Add → Select the title → Pick → Select Delivery type → Select the Title →Mention Price per Issue →OK → Save.

Subsciption → Order Cancellation:

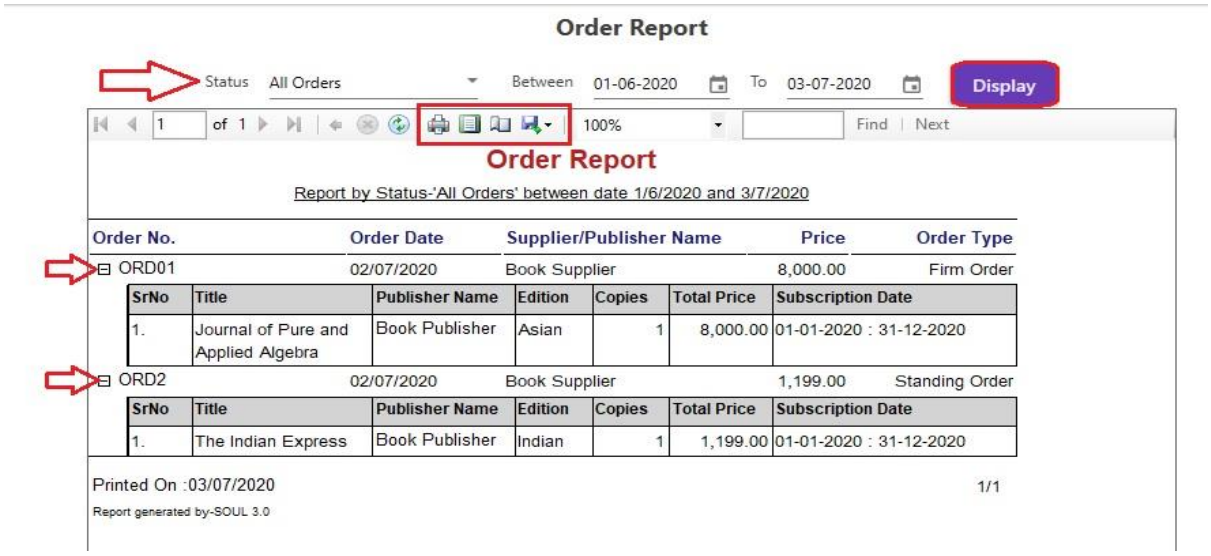


- Order Cancellation → Order Number → Cancellation Date → Order Date → Order Type → Select the Title in the check box/Cancel Whole Order → Click on Cancel Order button.

Subscription → Report:

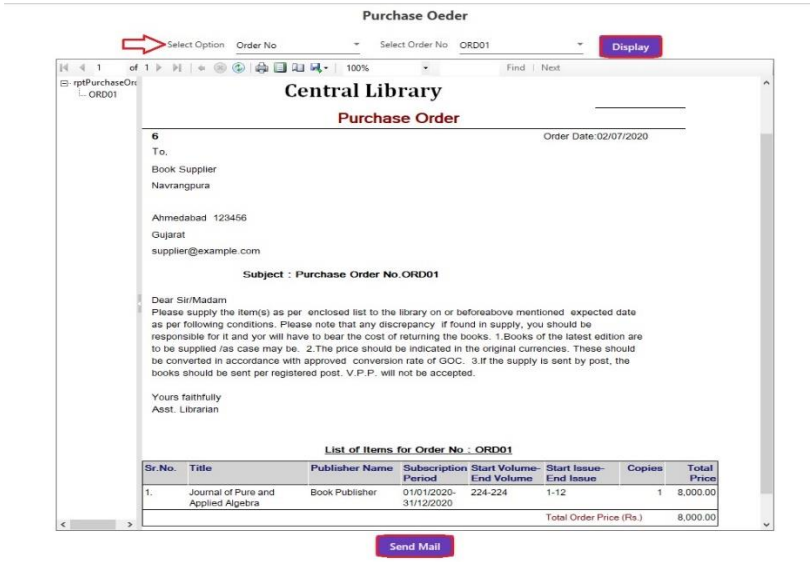


Reports → Order Report:



- Report → Order Report → Select Status from dropdown → Date Between and To → Display.

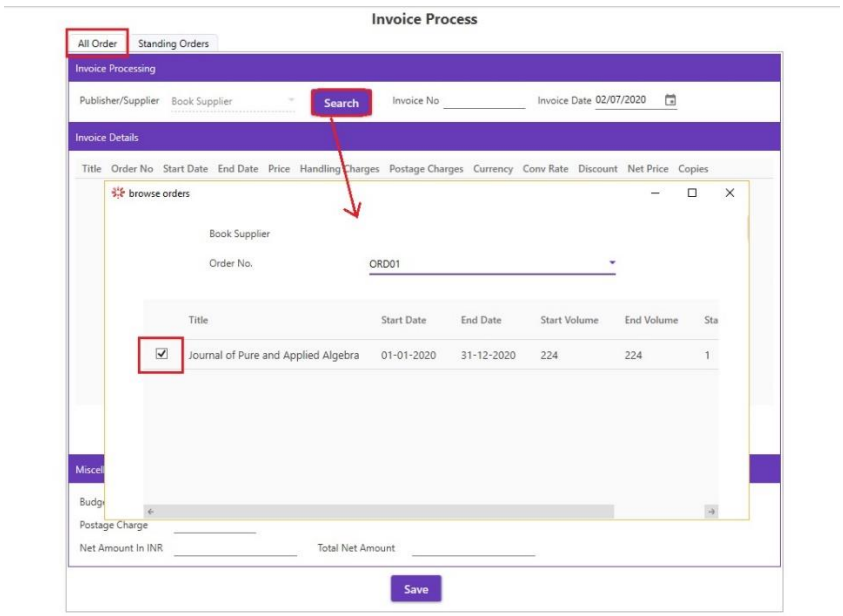
Report → Purchase Report:



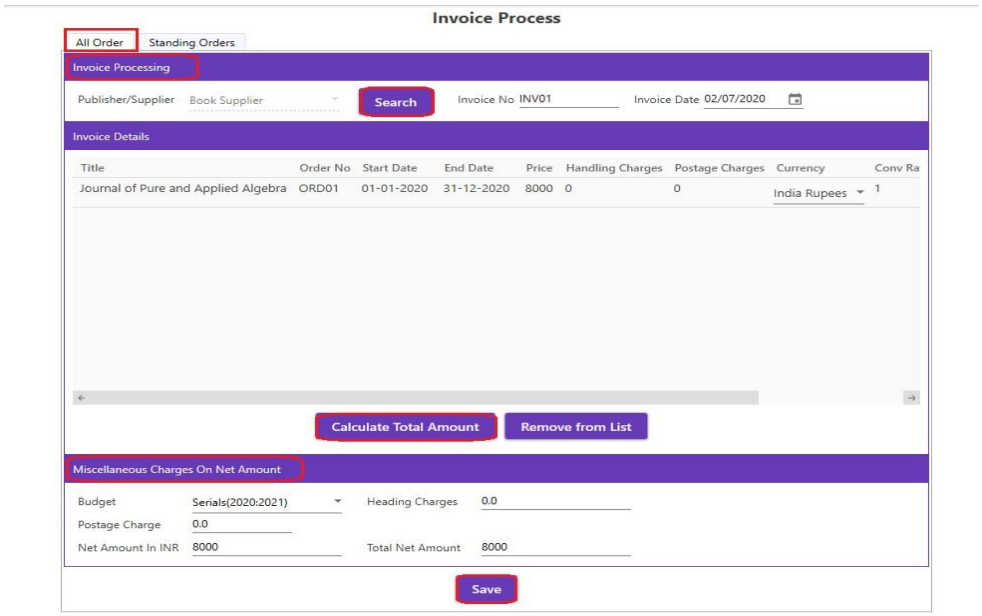
- Report → Purchase Report → Select Option → Select Order Number for dropdown → Click on Display button.

Payment:

Payment → Invoice Process:

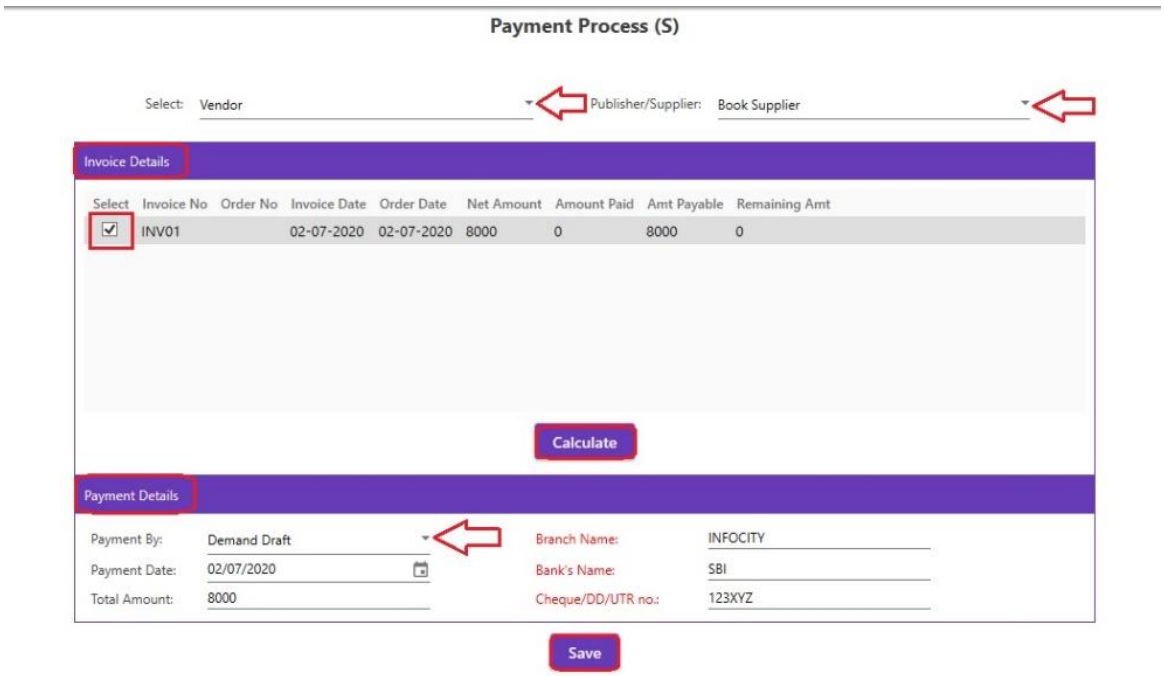


- Invoice Process → All Orders → Select Publisher/Supplier → Search →Select Order Number → Select Title in the check box → Save.



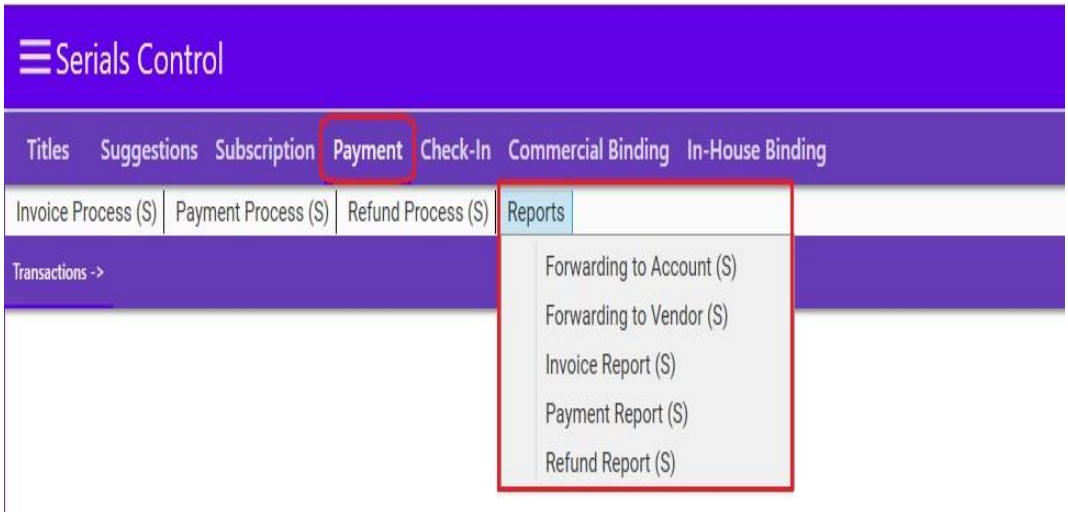
- Enter Invoice Number → Click on Calculate Total Amount → Select Budget → Postage Charges → Handling Charges → Save.

Payment → Payment Process:



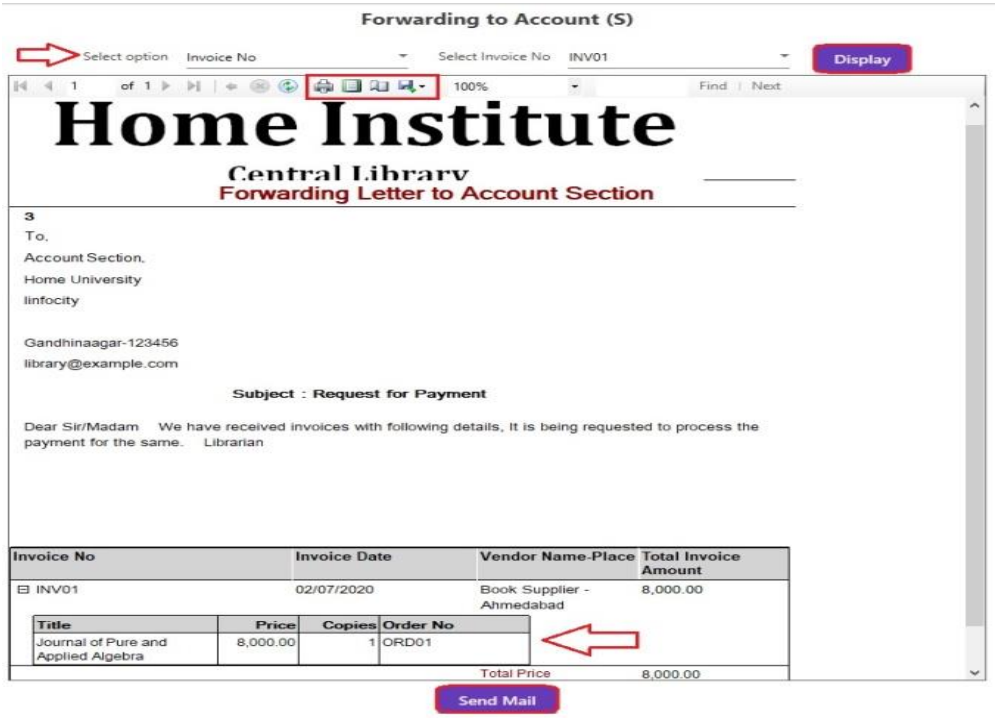
- Payment Process → Select Option → Publisher/Supplier → Select in check box the Invoice → Click on Calculate button → Select Payment Mode → Payment Date → Branch Name → Bank Name → Cheque/DD/UTR number → Save.

Payment → Reports:

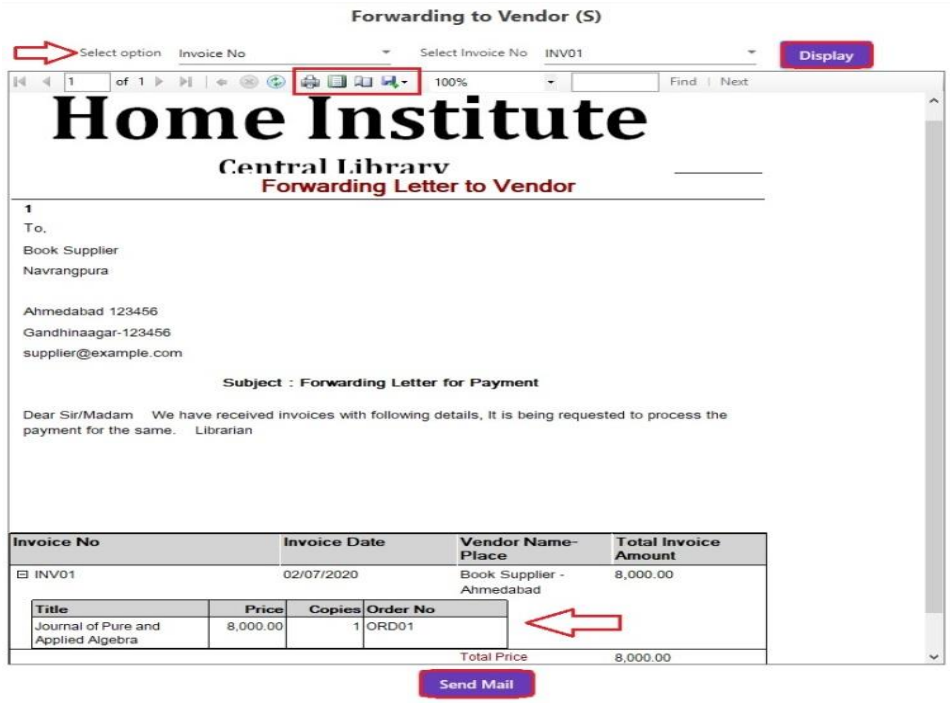


Forwarding to Account:

This option facilitates user to generate forwarding letter to Account Section requesting them to release the payment. One can generate this letter by Invoice No, Payment Date and supplier.



Forwarding Letter to Vendor:



Invoice Report:

One can generate invoice register through various parameters like supplier wise, Budget wise, Department wise, Payment status, Publisher, Currency, Invoice date between and Title wise. This report will give you status of each invoice.

Payment Report:

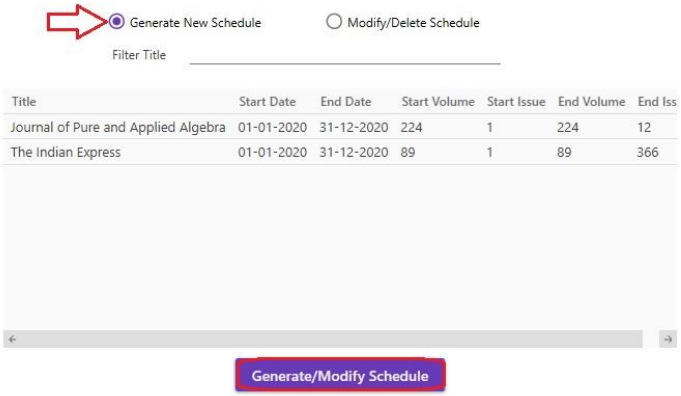
This report will give you list of all the payments generated against each order and received invoice, one can generate this report by supplier, date and budget as report parameters.

Refund Report:

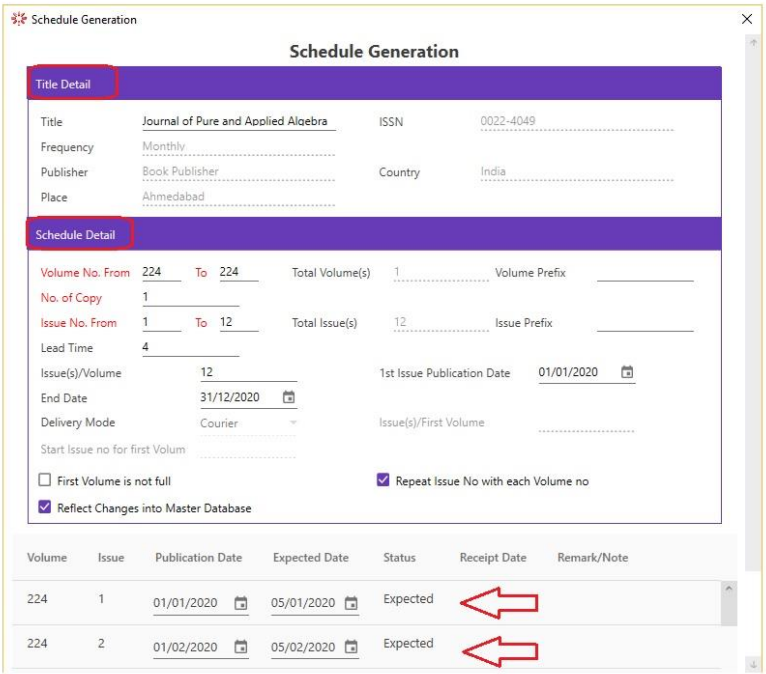
This option facilitates users to generate the report of refunded amount between particular dates.

Check In:

Schedule Generation:



Schedule Generation → Generate New Schedule → Filter title → Select or Double click on the title → Generate Schedule.

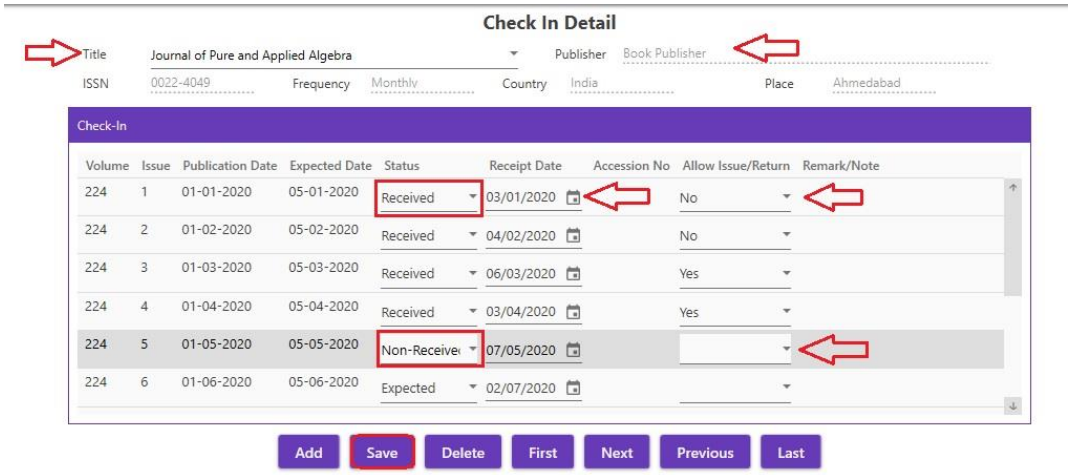


Generate Schedule → Save.

Check-In→ Non-Receipt Process:

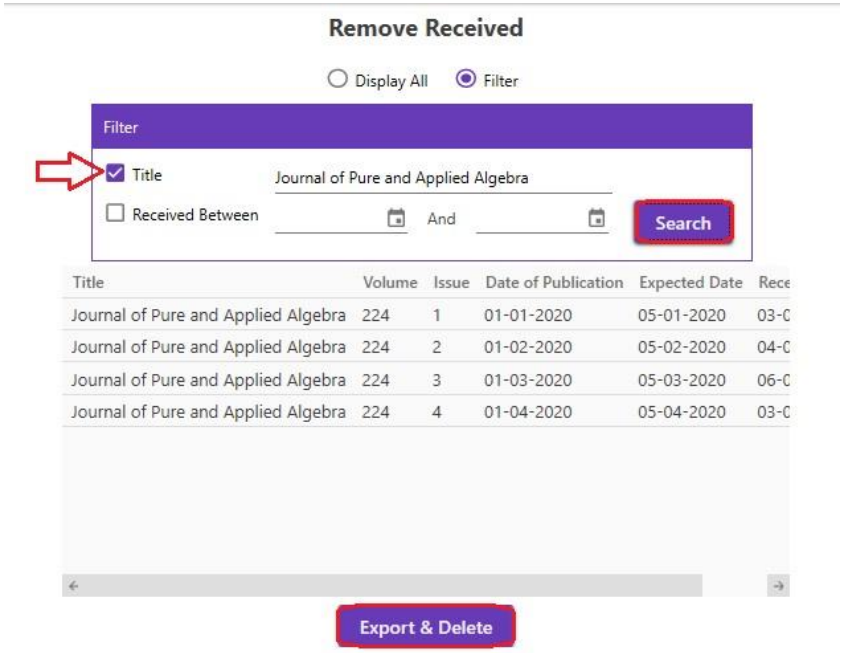
Non-Receipt Process → Either filter by title or date → Search → Select the title → Click on Convert into Non-Received.

Check-In→ Check in Details:



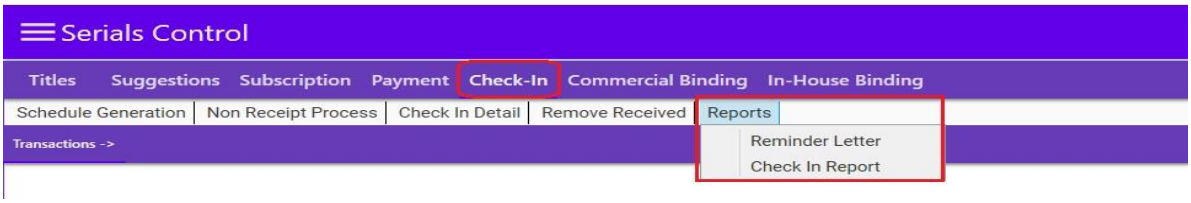
Check in Details → Select Title from dropdown → Change Status as Received → Accession Number (Optional) → Allow Issue/Return: Select from dropdown Yes/No → Remarks/Note → Save.

Check-In → Remove Received:

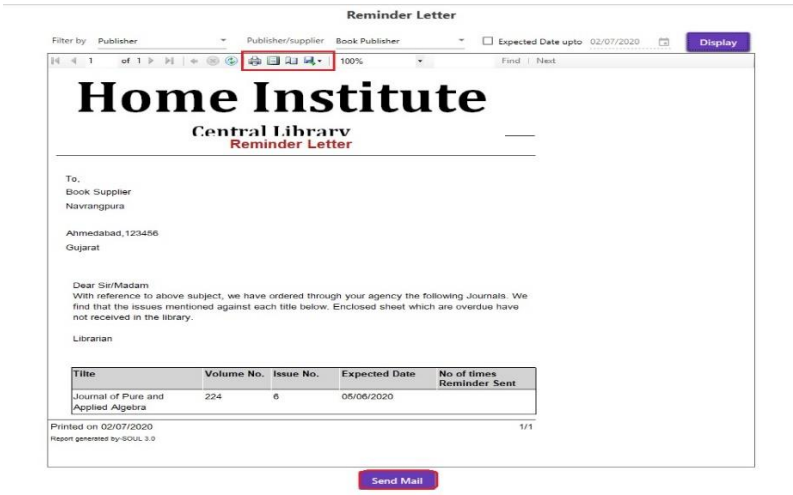


Remove Received → Filter either by Title or Received between and date → Search → Export & Delete.

Reports:

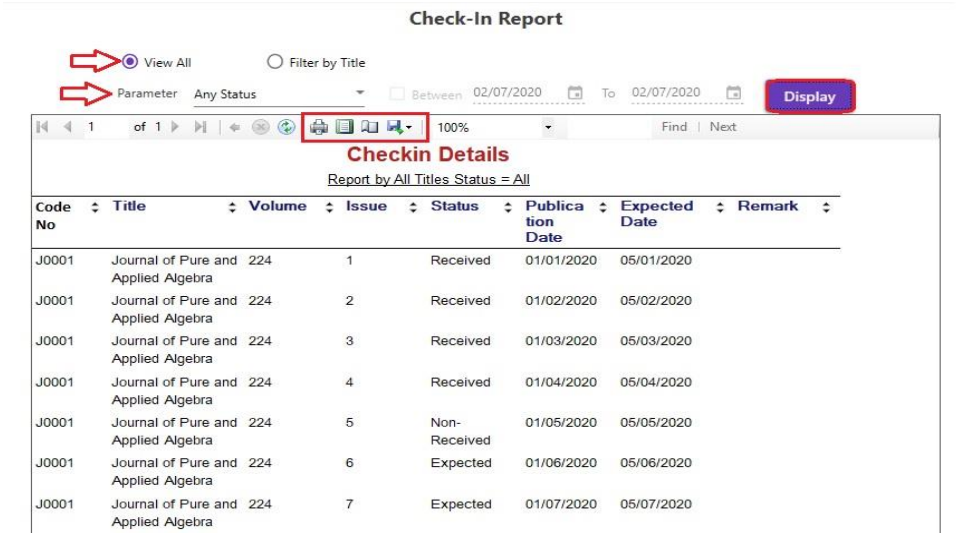


Reports → Reminder Letter:



Reminder Letter → Filter by: Select from dropdown → Select publisher/Supplier → Expected date upto → Display.

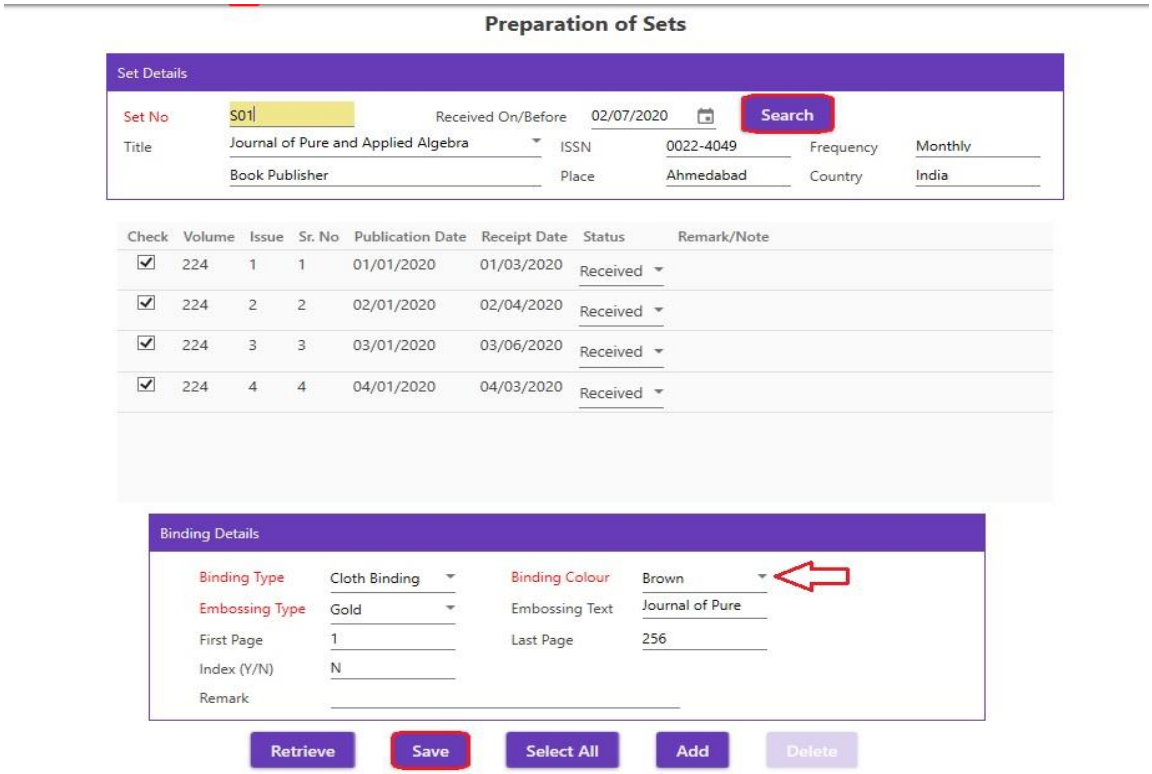
Reports → Check-in Report:



Check-in Report → View all/Filter by Title → Select parameter from dropdown → Date between and To → Display.

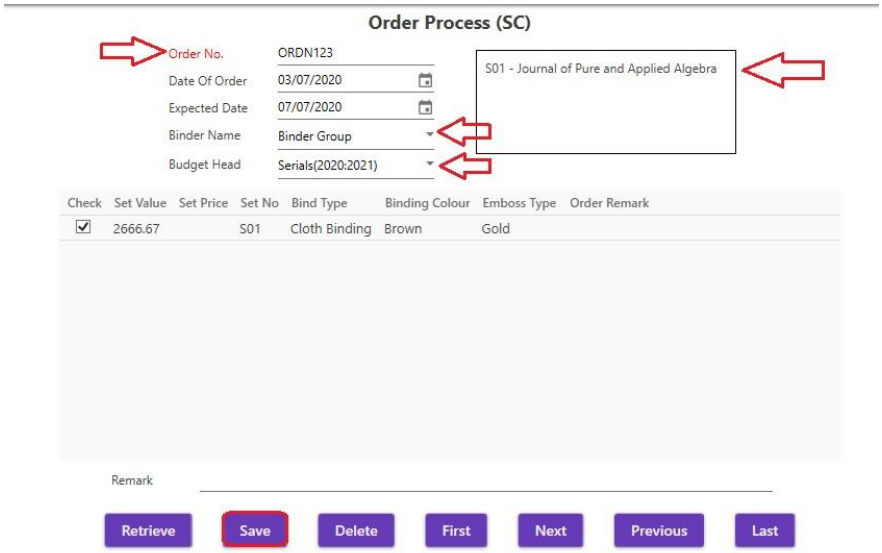
Serials Control → Commercial Binding:

Commercial Binding → Preparation of Sets:



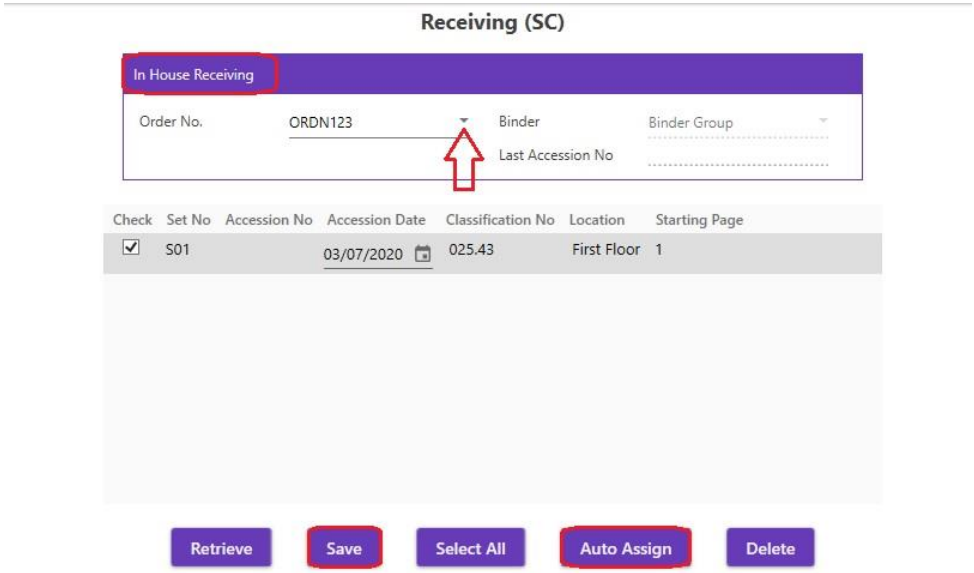
Commercial Binding → Assign Set Number → Received on/before Date → Select Title → Search → Select from check box Issues → Select Binding Type → Embossing Type → Binding Colour → Mention Embossing Text → First page → Last page → Index → Save.

Commercial Binding → Order Process:



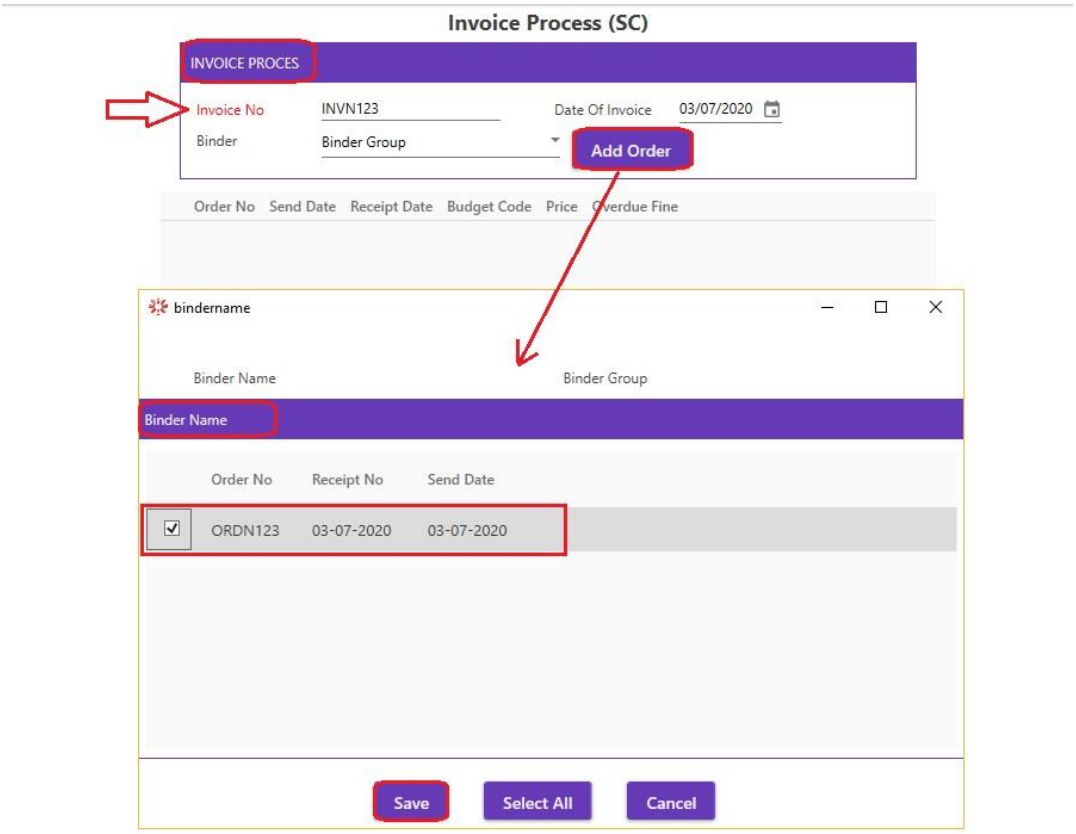
Order Process → Assign Order Number → Date of Order → Expected Date → Select Binder Name → Budget Head → Select the set in Check box → Save.

Commercial Binding → Receiving:

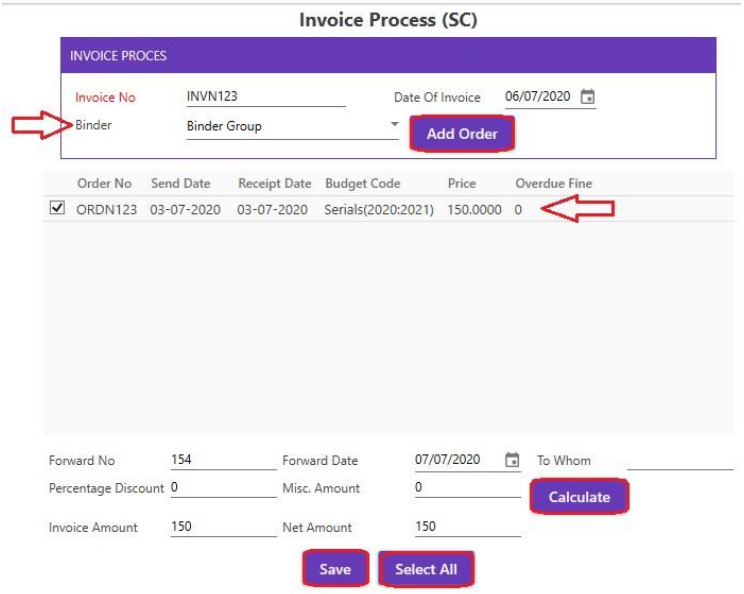


Receiving → Select Order Number from dropdown → Select in Check box Set Number received → Auto Assign (Accession No.) → Save.

Commercial Binding → Invoice Process:

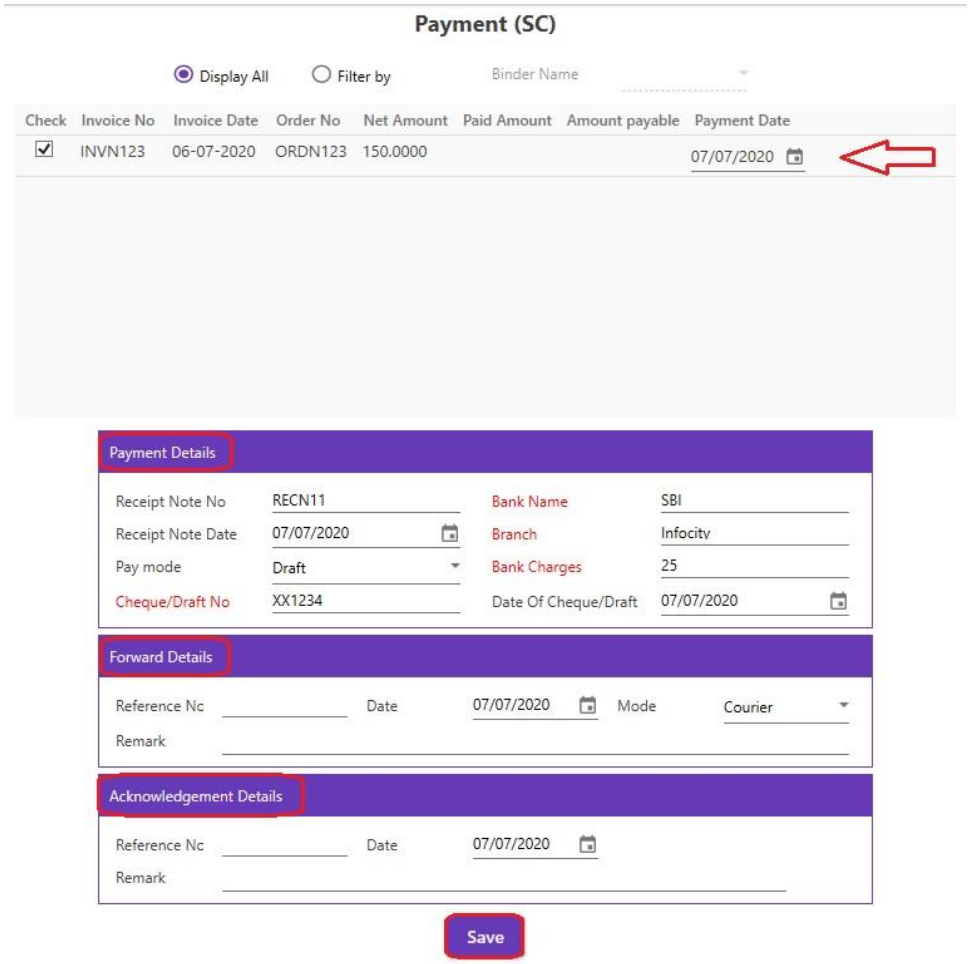


Invoice Process → Assign Invoice No. → Select Binder → Add Order → Select in Check box → Save.



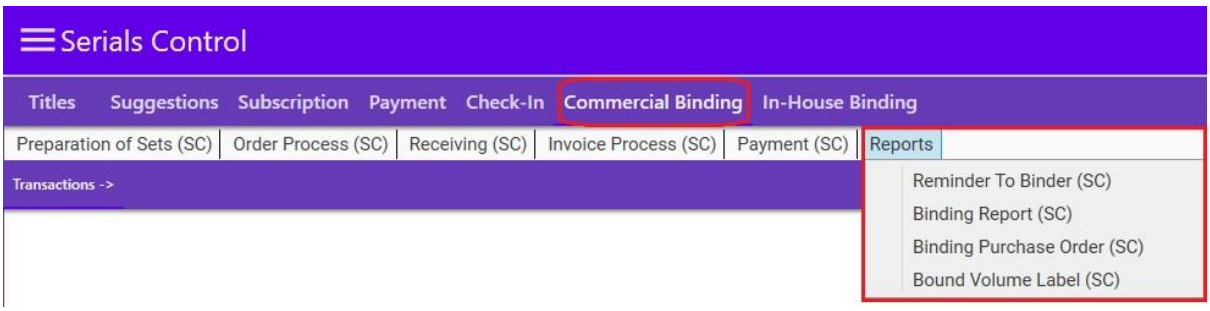
Select in Check box Order No./ Select All → Calculate → Save.

Commercial Binding → Payment:



Payment → Display All / Filter by Binder Name → Select in check box the order no. → Payments Details: Receipt Note No., → Receipt Note Date → Pay mode → Cheque /Draft No. → Bank Name → Branch → Bank Charges → Date of Cheque → Forward Details: Reference No. → Date → Mode → Remark → Acknowledgement Details: Reference No. → Date → Save.

Commercial Binding → Binding Reports:

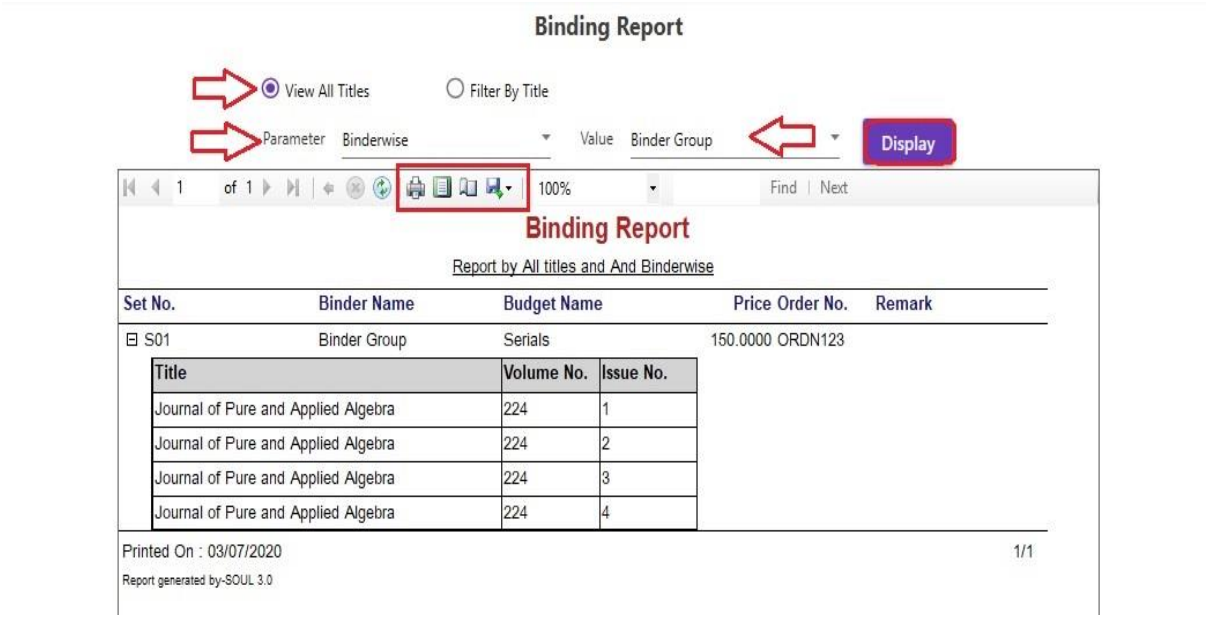


Reports → Reminder to Binder:

You can send reminder letter to binder if you have not received the bound volume till the expected date of order.

Reminder to Binder → Select Binder Name → Expected Date upto → Display.

Reports → Binding Reports:



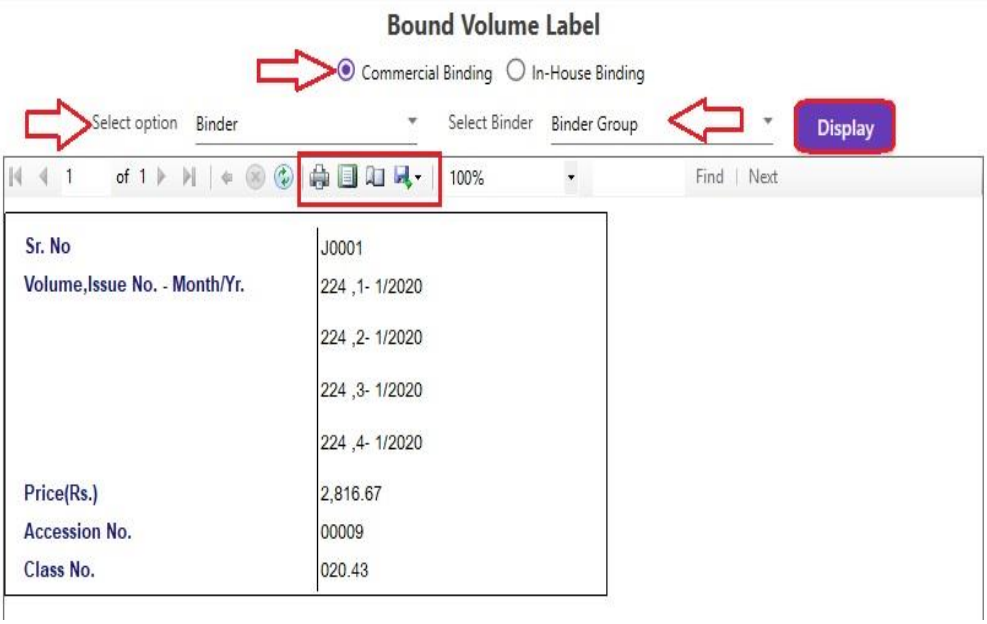
Binding Report → View All Titles/ Filter by Titles → Select Parameter from dropdown → Select Value from dropdown → Display.

Reports → Order for Binding:

You may generate purchase order of the binding set and send it to binder through this option.

Order for Binding → Select option: Order No./ Order Date / Binder from dropdown → Select : Order No./ Order Date / Binder from dropdown → Display.

Reports → Bound Volume Label:



Bound Volume Label → Commercial Binding / In-House Binding → Select option from dropdown → Again select appropriate option from dropdown → Display.

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