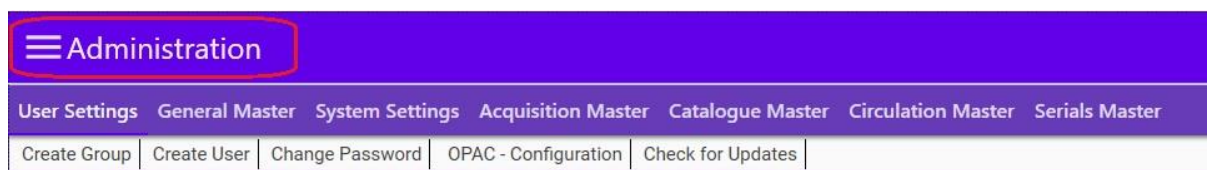


# SOUL 3.0: Administration Module

**Username: superuser**

**Password: su**

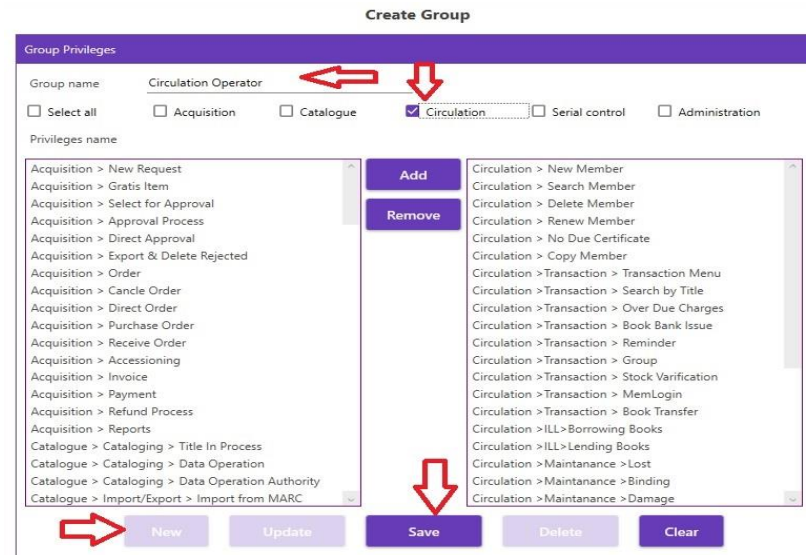
Set rules and feed standard information needed for our LMS. Select Administration from the menu which, in turn, provides following options:



**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:

**Create User**

Name and Password	
Username	System User
Group name	Circulation Operator
Password	...
Verify Password	...

Comment	
Comment	SOUL 3.0
Secret Question	which module
Answer	circulation

Location	
Library	Main Library
Address	Infocity
City	Gandhinagar
State	Gujarat
Phone	1234567890
Mobile	0123456789
Email	user@example.com
Pin code	382007
Country	India
Extension	

**Browse   Add New   Save   Delete   Clear**

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.

**Change Password**

Username	superuser
Old Password	..
New Password	.....
Verify New Password	.....
Secret Question	What is favourite number
Answer	.....

**Change Password**

## User Settings → OPAC - Configuration:

### Web OPAC / OPAC - Configuration

User Name

Librarian Name  Status

Password

Verify Password

Remark

#### Path Configuration

Index Path

Web-Service Path

- 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/Supervisor.**

## User Settings → Check for updates:

### Administration

User Settings	General Master	System Settings	Acquisition Master	Catalogue Master	Circulation Master	Serials Master
Create Group	Create User	Change Password	OPAC - Configuration	Check for Updates		

Transactions ->

- 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

The screenshot shows the 'Institute Details' form. It has a table with columns: Code, Description, Address line 1, Address line 2, City, PIN, Phone, Fax, Email. The first row is highlighted with a red box. The form fields on the right are: Code (01), Name (Home Institute), Address (Infocity), City (Gandhinagar), Pin (123456), Phone (1234567), Fax, and Email (home@example.com). The 'Add' button is highlighted with a red arrow.

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.

The screenshot shows the 'Department Details' form. It has a table with columns: Code, Department, Address line 1, Address line 2, City, PIN, Phone, Fax, E-Mail. The first row is highlighted with a red box. The form fields on the right are: Code (03), Name (Computer Science), Address (Infocity), City (Gandhinagar), Pin (123456), Phone (1234567), Fax, and Email (cs@example.com). The 'Address same as institute' checkbox is checked. The 'Add' button is highlighted with a red arrow.

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 Detail

Department	Branch Description
Library Science	BLIS

Course/Designation MLIS

Add branch

Save Cancel

Add Update Delete

### Course/Designation Master;

Add Branch → Add → Code → Name → Save.

Course/Designation Master

Code ML Name MLIS

Code	Name
BL	BLIS

Add Update Delete Save Cancel

### General Master → Country:

Country

Code ii Name India


Country Code	Country Name
ho	Honduras
hu	Hungary
ic	Iceland
idu	Idaho
ilu	Illinois
ii	India
inu	Indiana
io	Indonesia

Add Save Delete Cancel

Country → Add → Code → Name → Save.

## General Master → Currency:


**Currency**

Currency Code:  Date:  

Currency:  Conversion Rate:

Country:

Code	Currency	Conversion Rate	Country	Date
AED	United Arab Emirates Dirhams	19.23	United Arab Emirates	04/11/2019
AFN	Afghanistan Afghanis	0.90	Afghanistan	04/11/2019
ALL	Albania Leke	0.64	Albania	04/11/2019
ARS	Argentina Pesos	1.18	Argentina	04/11/2019
AUD	Australia Dollars	48.82	Australia	04/11/2019
BBD	Barbados Dollars	35.07	Barbados	04/11/2019
BDT	Bangladesh Taka	0.83	Bangladesh	04/11/2019
BGL	Bulgaria Leva	40.36	Bulgaria	04/11/2019
BHD	Bahrain Dinars	187.41	Bahrain	04/11/2019
BMD	Bermuda Dollars	70.65	Afghanistan	04/11/2019
BRR	Brazil Reais	17.73	Brazil	04/11/2019



**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:

 **Budget Head Entry** — □ ×

**Budget Head**

Budget Code:  **Category**

Budget Description:  ☒ Income   Expense

**Budget Head Entry**

**Budget Head**

Budget Code BK

Budget Description Books

Budget Expiry Date 31/03/2021

**Category**

☐ Income

☒ Expense

Clear Save Close

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.

**Budget Income**

Income Head Union Grant Commission

Financial Year 2020 To 2021

Opening Balance 0

Received Amount 1000000

Total Amount 1000000

Date 01/04/2020

Remarks

Clear Save Close

### 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.

Budget Expense

From Income From Expense

Period from 2020 To 2021

Income

Income Source	Available
Union Grant Commission	100000

Balance 40000

Allocation

Date 01/04/2020 Status ☒ Active ☐ Inactive

Expense Source Books

Opening 0 Allocated Amount 60000 Total Amount 60000

Clear Close Save

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:

Budget Transfer

Transfer ID 15062001 Date 15/06/2020

Source

Financial Year From	To
2020	2021

Source Budget Books

Available Amount 60000

Destination

Financial Year From	To
2020	2021

Destination Budget Serials

Available Amount 40000

Transfer Amount 10000 Remarks

Add Save

### 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**

Code eng Name English

Language Code	Language
dyu	Dyula
dzo	Dzongkha
efi	Efik
egy	Egyptian
eka	Ekajuk
elx	Elamite
eng	English
enm	English, Middle (1100-1500)
epo	Esperanto
est	Estonian
ewe	Ewe
ewo	Ewondo
fan	Fang

**Add Save Delete**

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

## General Master → Subject:

**Subject**

Classification Code 020 Subject Name Library & information sciences

Classification Number	Subject Name
685	Leather, fur goods & related products
026	Libraries for specific subjects
020	Library & information sciences
025	Library operations
021	Library relationships
570	Life sciences biology
535	Light & infrared & ultraviolet phenomena
410	Linguistics
800	Literature & rhetoric
895	Literatures of East & Southeast Asia
830	Literatures of Germanic languages
879	Literatures of other Italic languages
890	Literatures of other languages

**Add Save Delete Cancel**

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

## General Master → Physical Media:

**Physical Media**

Code: 990 Description: Bound Volumes

Code	Description
990	Bound Volumes
030	Braille
100	CD-ROM
099	Dharm
145	Irregular Serial
050	Laser/Optical
980	Loose Issue
040	Magnetic
115	Meeting Documents
150	Monographic Serials
900	Others
135	Patent
105	Reports

**Add Save Delete**

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

## General Master → Report:

**Administration**

User Settings System Settings Acquisition Master Catalogue Master Circulation Master Serials Master **General Master**

Institute Details Country Currency Budget Management Budget Transfer Language Subject Physical Media **Reports**

Transactions ->

- Currency Report
- Budget Report
- Budget Transfer Report
- Institute Report

## Currency Report:

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

**Updated Between** 15/06/2020 **To** 15/06/2020 **Display**

**Updated After** 15/06/2020

**Currency Report**

List of Currencies modified between '15/6/2020' And '15/6/2020'

Country Name	Currency Name	Currency Code	Conversion Rate	Date of Conversion
Germany	Euro	EUR	85.58	15/06/2020
United Kingdom	United Kingdom Pounds	GBP	95.33	15/06/2020
United States	United States Dollars	USD	75.99	15/06/2020

Printed On :15/06/2020  
Report generated by-SOUL 3.0

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## 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.

Select Category

Income

Year Between

2020

And

2021

Display

1 of 1

100%

Find | Next

### Budget Report

Report by Income Category and Year between 2020 and 2021

Budget Name	Category	Year	Opening Balance	Received Amt.	Committed Amt.	Spent Amt.	Available Amt.
Union Grant Commission	Income	2020-2021	0.00	100000.00	0.00	100000.00	0.00

Expense Source	Opening Balance	Received Amt.	Total Received Amt.	Available Amt.
Books	0.00	60000.00	60000.00	50000.00
Serials	0.00	10000.00	50000.00	50000.00
Serials	0.00	40000.00	50000.00	50000.00

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## Budget Transfer Report:

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

Search Between Date From

15/06/2020

To

15/06/2020

Display

1 of 1

100%

Find | Next

### Budget Transfer

Report by Date between 15/6/2020 and 15/6/2020

Source Budget	Period	Destination Budget	Period	Transaction Date	Amount Trsferred	Remarks
Books	2020 - 2021	Serials	2020 - 2021	15/06/2020	10,000.00	
Total					10,000.00	

Printed On : 15/06/2020  
Report generated by-SOUL 3.0

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## Institute Report:

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

Select Option Institute Select Home Institute Display

1 of 1 100% Find Next

### Institute / Department / Branch List

Report by Institute-Home Institute

Institute Code	Institute Name				
01	Home Institute Infocity, Gandhinagar - 123456 Phone : 1234567 Fax : Email : home@example.com				
Department : 02 Library Science					
Branch : <table border="1"><tr><td>BL</td><td>BLIS</td></tr><tr><td>ML</td><td>MLIS</td></tr></table>		BL	BLIS	ML	MLIS
BL	BLIS				
ML	MLIS				

Printed On :15/06/2020 1/1  
Report generated by-SOUL 3.0

## Administration → System Settings:

Administration

User Settings **System Settings** Acquisition Master Catalogue Master Circulation Master Serials Master General Master

Email & SMS Settings Image Upload Letter Layout Label Setting Letter Number Setting Collection Type Library Information Database Backup Theme Configuration

## System Settings → Email & SMS Settings:

Administration

User Settings General Master **System Settings** Acquisition Master Catalogue Master Circulation Master Serials Master

**Email & SMS Settings** Image Upload Letter Layout Label Setting Letter Number Setting Collection Type Library Information Theme Configuration

Email Configuration SMS - Text Email - Text

### Email Configuration

Domain Name example.com

SMTP Server smtp.example.com

Port 999

Authorized Email id user@example.com

Username user

Password \*\*\*\*

☐ Enable SSL

Save

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.

Email Configuration **SMS - Text** Email - Text

### SMS Configuration

Status: Issue

Message: Dear Sir/Mam, Book with the accession no. xaccx, Issue Date xissx and Due Date xdddx has been issued from the library to member xmmmx.

☒ Enable

**Update**

Variables available for use in a message when sendin the SMS.

- xaccx - Accession No
- xmmmx - Member Code
- xdddx - Due Date
- xissx - Issue Date
- xretx - Return Date

## System Settings→Image Upload:

Image Setup

Image Name: Letter\_Header

Image Description: Logo Image for Letter Heads (666 x 135)

Image Preview

Home Institute  
Central Library

C:\Users\soul32\Desktop\soul3\screenshot\Untitled.jpg

**Select Image** **Upload Image**

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

## System Settings→Letter Layout:

Letter Format

Letter Name: Letter for Approval

Subject: Subject : Approval letter


Letter Format: Dear Sir/Madam  
  
I am sending herewith a list of approved items which have been suggested by you or member of your department for including in the library  
  
Yours faithfully,  
(Librarian)

**Save**

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





### System Settings→Label Setting:

**Label Setting**

Label Name Barcode 

All Units should be in Inch only

Page Height	11.69
Page Width	8.26
Top Margin	0.59
Bottom Margin	0.713
Right Margin	0.197
Left Margin	0.197
No Of Columns	4
Column Space	0.19
No Of Rows	21
Row Space	0


   
 

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

### System Settings→Letter Number Setting:

**Auto Letter Number Generation**

Name	Prefix	Status
<input checked="" type="checkbox"/> Acquisition Forward to Account Reference	ACQ/ACC/YY	Active
<input type="checkbox"/> Acquisition Invoice Reference	ACQ/INV/YY	Active
<input type="checkbox"/> Acquisition Order	ACQ/ORD/YY	InActive
<input type="checkbox"/> Acquisition Payment Reference	ACQ/PAY/YY	InActive
<input type="checkbox"/> Acquisition Purchase Order	ACQ/PO/YY	InActive
<input type="checkbox"/> Acquisition Reminder	ACQ/REM/YY	InActive
<input type="checkbox"/> Serial Forward to Account	SR/FWD/ACC/YY	InActive
<input type="checkbox"/> Serial Forward to Account Reference	SR/ACC/YY	InActive
<input type="checkbox"/> Serial Forward to Vendor	SR/SUPP/YY	InActive
<input type="checkbox"/> Serial InvoiceProcessing	SR/INV/YY	InActive
<input type="checkbox"/> Serial Order	SR/ORD/YY	InActive
<input type="checkbox"/> Serial PrintOrder	SR/PO	InActive



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

## System Settings→Collection Type:

**Collection Type**


Code CH

Collection Type Children collection

Prefix C

Total Length for Accession No 0

Code	Collection Type	Prefix	Total Length
GN	General	G	0
RR	Reference	R	0
SP	Special Collection	P	0
TT	Text Books	T	0

 **Add** **Save** **Delete**

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.

**Library Information**

Library Name Central Library

University Name Home University

Librarian Name Mr Librarian

Address 1 Infocity

Address 2

City Gandhinagar Pin 123456

Phone 1234567 Fax

Email library@example.com

Technical Person Details	Library Person Details
Name <u>Mr Technical</u>	Name <u>Mr Librarian</u>
Division <u>Technical Division</u>	Division <u>Library Division</u>
Contact No <u>1234567890</u>	Contact No <u>123456789</u>
Email <u>tech@example.com</u>	Email <u>library@example.com</u>

**Save** **Edit**

## 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.

Theme Configuration

deeporange	deeppurple	green	indigo	orange	yellow	amber
Primary ✓ Accent ✓	Primary ✓ Accent ✓	Primary ✓ Accent ✓	Primary ✓ Accent ✓	Primary ✓ Accent ✓	Primary ✓ Accent ✓	Primary ✓ Accent ✓
lime	lightgreen	red	pink	purple	blue	lightblue
Primary ✓ Accent ✓	Primary ✓ Accent ✓	Primary ✓ Accent ✓	Primary ✓ Accent ✓	Primary ✓ Accent ✓	Primary ✓ Accent ✓	Primary ✓ Accent ✓
cyan	teal					
Primary ✓ Accent ✓	Primary ✓ Accent ✓					

Header Font Size Sub Header Font Size Language

Large Medium English

Save

प्रबंधन

प्रयोक्ता सेटिंग सामान्य संचालन सिस्टम सेटिंग अभिग्रहण संचालन सूची निर्माण संचालन परिसंचरण संचालन सामयिक/धारावाहिक संचालन

समूह बनाएँ प्रयोक्ता बनाएँ पासवर्ड बदलें ओपेक - विन्यास अपडेट के लिये जाँचें

## Acquisition Master:

Administration

User Settings System Settings Acquisition Master Catalogue Master Circulation Master Serials Master General Master

Vendor Management Vendor Report

## Acquisition Master → Vendor Management:

**Vendor Management**

☐ Inactive  
☒ Active

Vendor Name: Book Publishing House \*

Vendor Code: BOO001 \*

Specialization: General

Vendor Status: Publisher \*

Address: Navrangpura

City: Ahmedabad \* Pin: 123456 \*

State: Gujarat Country: India

Contact Details: Remarks

Contact Person: Mr Contact Person

Designation: Sales Manager

Email: sales@example.com \* Fax: \*

Phone: 1234567 \* Mobile: 1234567890

Add Delete Browse Save

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**

☒ Vendor Code ☒ Vendor Name ☒ Address ☒ Contact Person ☒ Email/Phone No ☒ Specialization ☒ Active/Inactive ☒ Status ☐ Remark

Select Option: All Vendors

Find | Next

**Vendors Report**

Report by All Vendors

Code	Vendor Name	Address	Contact Person	Phone/Email	Specialization	Act/Inact.	Status
BOO001	Book Publishing House	Navrangpura, Ahmedabad-123456, Gujarat	Mr Contact Person	1234567 sales@example.com	General	Active	Publisher

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Report generated by-SOUL 3.0

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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:

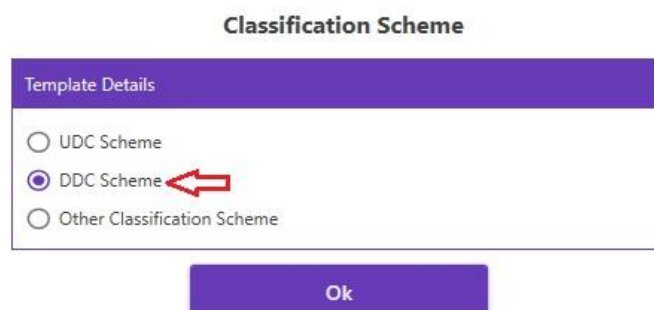
MARC records can be distinguished for various types of material by the specific codes used in Leader/06 (Type of Record). The leader of a MARC record identifies number of bibliographic record types.

### 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:

**Data Entry Template**

**Choose Data Entry Template**

Choose Template Type: Bibliographic Template      Select Template Option: New Template

Select Template:      Template Name: Book template      Remark: Bibliographic record

Select Marc Tag: 245 Title Statement (NR)      Ok

**Select Subfield**

Select	Tag	Subfield	Description
<input type="checkbox"/>	245	6	Linkage (NR)
<input type="checkbox"/>	245	8	Field link and sequence number (R)
<input checked="" type="checkbox"/>	245	a	Title (NR)
<input type="checkbox"/>	245	b	Remainder of title (NR)

**Tags in Template**

TagSave	SubfieldSave	DescriptionSave
082	a	Classification number (R)
100	a	Personal name (NR)
245	a	Title (NR)

Select All   Deselect All   Add to Template   Save   Delete Template   Cancel

List 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:

**Report Template**

Choose Template Option	Template Details	Report Size
<input checked="" type="radio"/> New Report Template <input type="radio"/> Edit View Report Template <input type="radio"/> Delete Report Template	Select Template: _____ Report Template Name: Report Template Remark: Accession Report	Height (Inch): _____ Width (Inch): _____

☒ Call Number  
☐ Class No  
☐ Collection Type  
☐ Date of Acquisition  
☐ Department  
☐ Edition  
☐ Invoice Date  
☐ Invoice No  
☐ ISBN  
☐ Issue No/Volume No  
☐ Keyword  
☐ Location  
☐ No. Of Copies  
☐ Note(s)  
☐ Physical Description  
☐ Price  
☒ Publisher  
☐ RecID

- 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:

**Global Search & Replace**

Tag and Subfield					
Select Tag	100 Main Entry - Personal Name (NR)	Word like	Gandhi, M.	20	<input type="button" value="Search"/> <input type="button" value="Replace All"/>
Select Subfield	a Personal name (NR)	Replace With	Gandhi, M. K.	* This Operation is Case-Sensitive	

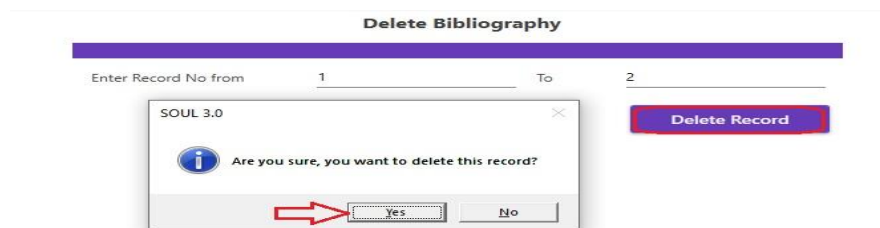
  

SrNo	Select	Title	Author	Call No	Location	Accession No	Status
1	<input checked="" type="checkbox"/>	मेरे सपनों का भारत	Gandhi, M.,	/		00001	Available

- 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”.

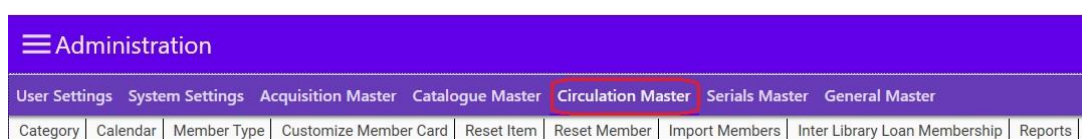
## Delete Bibliography

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

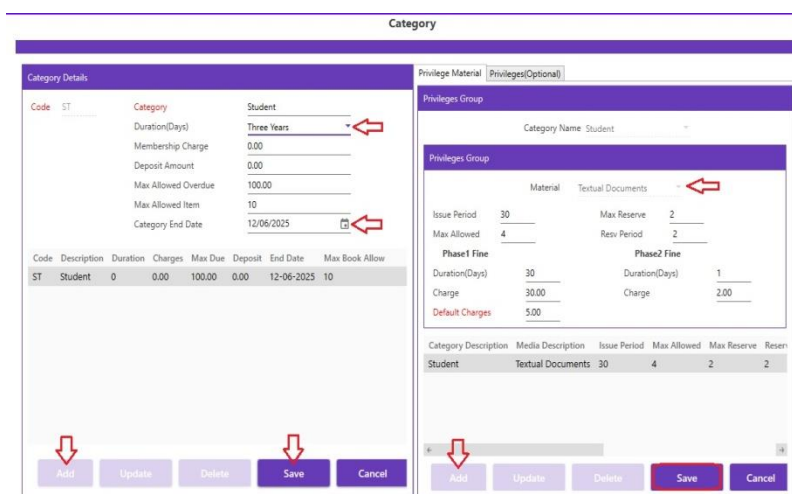


Enter Record number from and To → Delete Record.

## 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:

**Category**

**Category Details**

Code: ST    Category: Student

Duration(Days):

Membership Charge: 0.00

Deposit Amount: 0.00

Max Allowed Overdue: 100.00

Max Allowed Item: 10

Category End Date: 12/06/2025

Code	Description	Duration	Charges	Max Due	Deposit	End Date	Max Book Allow
ST	Student	0	0.00	100.00	0.00	12-06-2025	10

Add   Update   Delete   Save   Cancel

**Privilege Material**   **Privileges(Optional)**

**Category Collect Detail**

Category Name: Student

Collection Type: Reference

Overnight Issue: ☒   Max Item Allow Reserve: 2

On Premises Issue: ☒   End time for on Premises Issue: 1600

Collection Type	Category Name	Over-night issue	On-premises issue allow	Max Reserve
Reference	Student	Y	Y	2

Add   Update   Delete   Save   Cancel

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:**

**Calendar**

**Week off Entry**

Week off Day: Sunday

Save   **Update**

**Holiday Details**

Date: 15/08/2020   Occasion: Independence Day of India

Holiday Date	Holiday Name
15-08-2020	Independence Day of India

Add   Delete   **Save**   Cancel

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**

**Member Details**

Member Type:  Maximum Books:   
 Maximum Amount:  End Date:

Member Type	Maximum Amount	Maximum Books	End Date
GENERAL	10000.00	10	12-06-2020

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

## Circulation Master → Customize Member Card:

**Customize Member Card**

**Choose Option**

☐ New Template  
☒ Edit Template  
☐ Delete

**Template Details**

Select Template:   
 Template Name:   
 Remark:

**Report Size**

Height (Inch):   
 Width (Inch):

☐ Barcode

☒ Course Designation

☒ Department Name

☒ Institute Address

☒ Institute Logo

☒ Institute Name

☐ Instruction

☒ Librarian Sign

☒ Member Address

☐ Member Code

☒ MemberDateOfBirth

☒ Member ID

☒ Member Name

☒ Member Sign

☒ Member Photo

☒ Valid From

☒ Valid Up To

### 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**

Book Detail

Accession No

00002

Accession No	Book Status	Title	Author	Call No	Material	Iss
00002	Issued	Artificial intelligence	Rich, Elaine, ,		Textual Documents	N

Remove Item

Remove All Items

Update Item Status

Please note : It will only reset the item which book status either is "issue" or "on hold".

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

## Circulation Master → Reset Member:

**Reset Member**

Member Code / ID

ST03MS200001

Member Detail

Member Name

Library User 4

Member Code

ST03MS200001

Department

Computer Science

Category

Student

Current Date

0

Reset Member

Reset Member → Member Code/ID → Reset Member.

## Circulation Master → Import Member:

The interface is titled 'Import Member' and features a purple header bar. Below the header, there are three main sections:

- Select Files to Import:** Includes a text input field with the path 'C:\Users\HRDLab07\Desktop\nit', a 'Browse' button, and a red-bordered 'Import to SOUL 3.0' button.
- Select folder path for Member Photo:** Includes a text input field with the path 'C:\Users\HRDLab07\Desktop\nitesh\n', a 'Browse Folder' button, and a 'Download' button with a download icon.

Below these sections is a table with the following data:

Category	CourseDesignation	Institute	Department	MemberFirstName	MemberLastName	PermanentAddress	PermanentCity	PermanentPinC
Student	MLIS	Home Institute	Library Science	Library	User 2	Navrangpura	Ahmedabad	380009
Student	BSc	Home Institute	Computer Science	Library	User 3	Navrangpura	Ahmedabad	380009
Student	MSc	Home Institute	Computer Science	Library	User 4	Navrangpura	Ahmedabad	380009

Below the table are four mapping sections, each with a table:

- Category Mapping:**

Category	MappingValue
Student	ST(Student)
- Institute Mapping:**

Institute	MappingValue
Home Institute	01(Home Institute)
- Department Mapping:**

Department	MappingValue
Computer Science	03(Computer Science)
Library Science	02(Library Science)
- Course-Designation Mapping:**

Branch	MappingValue
BLIS	BL(BLIS)
BSc	BS(BSc)
MLIS	ML(MLIS)
MSc	MS(MSc)

### 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;

The interface is titled 'Import Member' and features a purple header bar. Below the header, there are three main sections:

- Select Files to Import:** Includes a text input field with the path 'C:\Users\HRDLab07\Desktop\nit', a 'Browse' button, and a red-bordered 'Import to SOUL 3.0' button.
- Select folder path for Member Photo:** Includes a text input field with the path 'C:\Users\HRDLab07\Desktop\nitesh\n', a 'Browse Folder' button, and a 'Download' button with a download icon.

Below these sections is a table with the following data:

Category	CourseDesignation	Institute	Department	MemberFirstName	MemberLastName	PermanentAddress	PermanentCity	PermanentPinC
Student	BLIS	Home Institute	Library Science	Library	User 1	Navrangpura	Ahmedabad	380009
Student	MLIS	Home Institute	Library Science	Library	User 2	Navrangpura	Ahmedabad	380009
Student	BSc	Home Institute	Computer Science	Library	User 3	Navrangpura	Ahmedabad	380009
Student	MSc	Home Institute	Computer Science	Library	User 4	Navrangpura	Ahmedabad	380009

**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.



Select folder path for Member Photo

C:\Users\admin\Desktop\MemberPho

Browse Folder

### 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);

Category Mapping		Institute Mapping	
Category	MappingValue	Institute	MappingValue
Student	ST(Student)	Home Institute	01(Home Institute)
Department Mapping		Course-Designation Mapping	
Department	MappingValue	Branch	MappingValue
Computer Science	03(Computer Science)	BLIS	BL(BLIS)
Library Science	02(Library Science)	BSc	BS(BSc)
		MLIS	ML(MLIS)
		MSc	MS(MSc)

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.





**Member Listing**

Selection Option: All ↩

☐ No Due Members

☒ Entry Date Between: 01/06/2020 ↩ And 03/07/2020

**Display**

Member Code	Category	Member Photo	Member Name	D.O.B	Academic Details	Member ID	Permanent Address	Temporary Address
ST02BL200001	Student		User 1 Library	10/03/1999	BLIS Library Science Home Institute	BL-021	Navrangpura, Ahmedabad-380009 Phone : 1234567890	Navrangpura, Ahmedabad-380009 Phone : 1234567890
ST02ML200001	Student		User 2 Library	10/03/1999	MLIS Library Science Home Institute	BL-022	Navrangpura, Ahmedabad-380009 Phone : 1234567890	Navrangpura, Ahmedabad-380009 Phone : 1234567890
ST03BS200001	Student		User 3 Library	11/03/1999	BSc Computer Science Home Institute	BL-023	Navrangpura, Ahmedabad-380009 Phone : 1234567890	Navrangpura, Ahmedabad-380009 Phone : 1234567890
ST03MS200001	Student		User 4 Library	12/03/1999	MSc Computer Science Home Institute	BL-024	Navrangpura, Ahmedabad-380009 Phone : 1234567890	Navrangpura, Ahmedabad-380009 Phone : 1234567890

**Send Mail**

**Circulation Master → Inter Library Loan:**

**Inter Library Loan → Institutional Membership:**

**Inter Library Loan Membership**

**ILL Details**

Library: Institutional ↩ Code: ILINS2001

Name: Institute Library

Address: Navrangpura

City: Ahmedabad Pin: 123456

Phone: 1234567 Fax: 1234567

Librarian: Institutional Librarian Reference No:

Contact: 1234567890

Effective From: 12/06/2020 To: 12/06/2025

Email: institute@example.com

Remarks:

Code	Name	Address	City	PIN	Phone	Fax	Librarian Name
ILINS2001	Institute Library	Navrangpura	Ahmedabad	123456	1234567		Institutional Librarian

Add
Update
Delete
Save
Cancel

**Privileges Details**

Library Name: Institute Library ↩

Type of Material: Textual Documents ↩

Issue Period (Days): 30

Max Allowed (Nos): 5

Fine Charges (Rs.): 10

Librarian Name	Media Description	Max Allowed	Fine Charges	Issue Period
Institute Library	Textual Documents	5	10.00	30

Add
Update
Delete
Save
Cancel

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 Membership**

**IL Details**

Library: Departmental Code: DLU62002

Name: Library Science Department

Address: Infocity

City: Gandhinagar Pin: 123456

Phone: 1234567 Fax:

Librarian: Departmental Librarian Reference No:

Contact: 1234567890

Effective From: 12/06/2020 To: 12/06/2025

Email: dept@example.com

Remarks:

**Privileges Details**

Library Name: Library Science Department

Type of Material: Textual Documents

Issue Period (Days): 30

Max Allowed (Nos): 10

Fine Charges (Rs.): 5

Librarian Name:

Media Description:

Max Allowed:

Fine Charges:

Issue Period:

**Table:**

Code	Name	Address	City	PIN	Phone	Fax	Librarian
DLU62002	Library Science Department	Infocity	Gandhinagar	123456	1234567		Departmental Librarian
ILINS2001	Institute Library	Navrangpura	Ahmedabad	123456	1234567		Institute Librarian

**Buttons:** Add, Update, Delete, Save, Cancel

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:

**Administration**

User Settings General Master System Settings Acquisition Master Catalogue Master **Circulation Master** Serials Master

Category Calendar Member Type Customize Member Card Reset Item Reset Member Import Members Inter Library Loan Membership **Reports**

Transactions ->

**Reports**

- Institute List
- Category Listing

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)

**Institute List**

Select Option: Institute Select: Home Institute **Display**

**Institute / Department / Branch List**

Report by Institute-Home Institute

Institute Code	Institute Name
01	Home Institute Infocity, Gandhinagar - 123456 Phone : 1234567 Fax : Email : home@example.com
<b>Department : 02 Library Science</b>	
Branch :	BL BLIS ML MLIS
<b>Department : 03 Computer Science</b>	
Branch :	BS BSc MS MSc

## 2] Membership Categories List (Category details)

**Category Listing**

☒ All 
 ☐ By Category 
 Display

Category Code	Category Name	Category Duration	Charges	Max Due	Deposit
SF	Staff	360	0.00	100.00	0.00
	Media Code Media Name	Fine Charges	Issue Period	Max Allowed	Res Period
010	Textual Documents	5.00	30	10	2
ST	Student	0	0.00	100.00	0.00
	Media Code Media Name	Fine Charges	Issue Period	Max Allowed	Res Period
010	Textual Documents	5.00	30	4	2

Printed On : 12/06/2020 1

## Administration → Serials Master.

Administration						
User Settings	General Master	System Settings	Acquisition Master	Catalogue Master	Circulation Master	Serials Master
Vendor Management (SM)	Frequency Master	Delivery Mode	Binding Type	Edition Master	Reports	

## Serials Master → Vendor Management:

**Vendor Management**

Category: Publisher ←
☐ Inactive 
 ☒ Active

Name: Book Publisher 
 Code: BOO001

Address: Navrangpura

City: Ahmedabad 
 Pin: 123456

State: Gujarat 
 Country: India

Contact Person: Mr. Publisher

Email: publisher@example.cor 
 Phone: 1234567

Mobile: 1234567890 
 Fax:

Remarks:

Add Save Modify Delete First Previous Next Last





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**

Code m Description Monthly No Of Issue 12 Period Months Months 1

Name	Code	Days	Months	Year	Days Month Year	Issues Year
Three times a week	i	2	0	0	D	156
Three times a month	j	10	0	0	D	36
Continuously Updated	k	0	0	0	0	0
Monthly	m	0	1	0	M	12
Fortnightly	n	15	0	0	D	26
Quarterly	q	0	3	0	M	4
Semimonthly	s	15	0	0	M	24
Three times a year	t	0	4	0	M	3





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

## Serials Master → Delivery Mode:

**Delivery Mode**

Code H Description Hand Delivery

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

Delivery Mode → Add → Code → Description → Save.


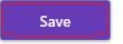


## Serials Master → Binding Type:

**Binding Type**

Code CBR Name Brown

Binding Code	Binding
CBR	Brown
CDA	Dark
CDG	Dark Green
COT	Others
CRE	Red
CYE	Yellow
EGO	Gold
EOT	Others

Note: Please ensure following prefix while assigning code; 'T' for Type of Binding; 'C' for Colour of Binding; 'E' for Embossing Type

Binding Type → Add → Code → Name → Save.

## Serials Master → Edition Master:

**Edition Master**

Code A ..... Name Asian ←

Code	Description
A	Asian
E	Eastern Economy
I	Indian
P	Paperback

→ Add Save Delete Reset

Edition Master → Add → Code → Name → Save.

## Serials Master → Reports:

≡ Administration

User Settings Acquisition Master System Settings Catalogue Master Circulation Master **Serials Master** General Master

Vendor Management (SM) Frequency Master Delivery Mode Binding Type Edition Master **Reports**

Transactions ->

- Vendor Report (SM)
- Frequency Report
- Delivery Report

## 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.

**Publisher/Supplier/Binder Report**

Parameter All Vendors ←

→ View All ☐ Filter results by ☐ Suppliers ☐ Publishers ☐ Binders **Display**

1 of 1 100% Find Next

**Vendor Management**  
Report by : All Vendors

Vendor Code	Vendor Name	Address	Contact Person	Status
BOO001	Book Publisher	Navrangpura	Mr. Publisher	Active
BOO002	Book Supplier	Navrangpura	Mr. supplier	Active

Printed On : 12/06/2020 1/1  
Report generated by-SOUL 3.0

## 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.

**Frequency Report**

Search Parameter \_\_\_\_\_ ☒ Exact Search ☐ Anywhere in text Display

1 of 1 100% Find | Next

**Frequency Report**  
Report by : All Frequency

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	Bi-monthly	M	6	0	2	0
c	Semi-weekly	D	104	3	0	0
d	Daily	D	366	1	0	0
e	Bi-weekly	D	26	14	0	0
f	Semi-annual	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	Continuously Updated	o	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	Semi-monthly	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	o	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”.

**Delivery Mode Report**

Search Parameter \_\_\_\_\_ ☒ Exact Search ☐ Anywhere in text Display

1 of 1 100% Find | Next

**DeliveryMode Report**  
Report by : All Records

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

**≡ Catalogue**

**Cataloguing** Import/Export User Services Reports

Title(s) In-Process Book Theses Data Operation

**Cataloguing → Book:**

**Main Entry:**

**Main Entry** Optional Entry

Leader Book nam a22 4a 4500 **Modify** Fixed Field (006/8) Books n ||lg||||Z||||| **Modify**

**Title Statement (245)** **Edition Statement (250)**

Title added ent Nonfilingcharac

Title \$a Colon classification Number of part \$n

Remainder of Title \$b The basic classification Statement of responsibility \$c Name of part \$p

Edition \$a 6th ed

Rem.of Edition \$t.\$b

**Contributors**

Personal Name(100) Corporate Name(110) Meeting Name(111) Uniform Name(130)

Personal name(100/700) Type of personal name entry element Type of added entry/Thesaurus ☐ Added Entry

Personal name \$a Ranganathan, S. R. Dates associated with a name \$d

Relator term \$e Author. Fuller form of name \$q Shiyali Ramamrita Ranganath

**Publisher Information (260)**

Name \$b Ess Ess Publications Place \$a New Delhi Language English Class No. \$a

Date \$c 2008 Country India ISBN (020) \$a 9788170004233

**Physical Description (300)**

Pagination \$a 124p Illustration \$b Dimension \$c 24cm Acc. Material \$e

**Location (852)**

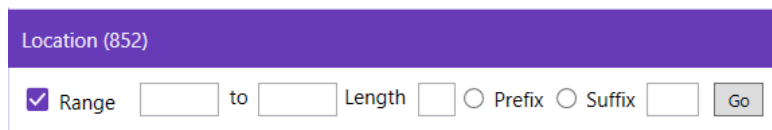
☐ Range

Copy No \$t 1 Shelving sche # Shelving orde #

Accession No \$p 00003 Collect. Type \$b Text Books Coded Location \$f Main Library Department Library Scienc Supplier Ess Ess Public

Material Textual Docu Class No. \$k 025.43 Location \$a First Floor Budget Books Invoice No. INV001

- **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:



The screenshot shows a web form titled "Location (852)" with a purple header. Below the header, there are several input fields and options. The "Range" option is selected with a checked checkbox. The form includes fields for "Range" (with a "to" separator), "Length", "Prefix", "Suffix", and a "Go" button.

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:

Catalogue -> Cataloguing Process -> Data Operation -> Book Bibliographic Details (Predefined)

Main Entry
Optional Entry

Varying form of title (246)

Note/added 
Type of title

Display text \$i

Title \$a 
Remainder of title \$b

Place \$a 
Name of part/sec of work \$p

Subject Added Entry (6XX)

Chronological Term(648)
Topical Term(650)
Geographic Name(651)
Faceted Topical Term(654)

Personal Name(600)
Uncontrolled Term(653)
Corporate Name(610)
Meeting Name(611)
Uniform Title(630)

Personal name
Type of personal name entr 
Thesaurus 
☐ Added Entry

Personal name \$a 
Dates associated with a name \$d

Relator term \$e 
Fuller form of name \$q

URL(856) \$u
Access method 
Relationship

Note (5XX)

General(500)
Formatted Contents(505)
Bibliographic(504)
With(501)
Citation/Ref.(510)
Language(546)
Supplement(525)

General \$a

Record ID: 3
Last Acc. No.

New
Edit
Save
First
Previous
Next
Last

- 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.

Theses x

Catalogue -> Cataloguing Process -> Data Operation -> Theses Details (Predefined)

Leader Theses ntm a22 a 4500 Modify Fixed Field (006/8) Theses n |||frmmmmZ001 Modify

Title Statement (245)

Title added entry Nonfillingcharacters

Title \$a Number of part \$n  
Remainder of Title \$b Statement of responsibility \$c Name of part \$p

Contributors

Personal Name(100) Corporate Name(110) Uniform Name(130)

Personal name(100/700) Type of personal name entry element Type of added entry/Thesaurus ☐ Added Entry

Personal name \$a Dates associated with a name \$d  
Relator term \$e Fuller form of name \$q

Publisher Information (260)

Name \$b Place \$a Language Class No. \$a  
Date \$c Country ISBN (020) \$a

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

Data Operation

☒ Template Based Data Entry ☐ Authority Template Based Data Entry

Select Book

OK Cancel

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

**Catalogue -> Cataloguing Process -> Data Operation -> Book Bibliographic Details (Template Based)**

---

Leader
Authority Pers
nz a22 n 4500
Modify
Fixed Field (006/8)
Personal Nam
neaca||a||n
Modify

Country
India
Language
English
Attachment

**Title Statement (NR) (245)**

	a	Title (NR)	
	b	Remainder of title (NR)	

**Publication, Distribution, Etc. (Imprint) (NR) (260)**

	a	Place of publication, distribution, etc. (R)	
	b	Name of publisher, distributor, etc. (R)	

**Location (852)**

☐ Range

Copy No \$t 1
Shelving s
Shelving c

Accession No \$p
Collect. Type \$b
Coded Location \$f Main Libr
Department
Supplier

Material Textual Dc
Class No. \$k
Location \$a
Budget
Invoice No.

Status Available
Book No. \$m
Shelving Location \$c
Currency India Rupr
Invoice Dt.

Issue Restricted
Price
Date of Acq

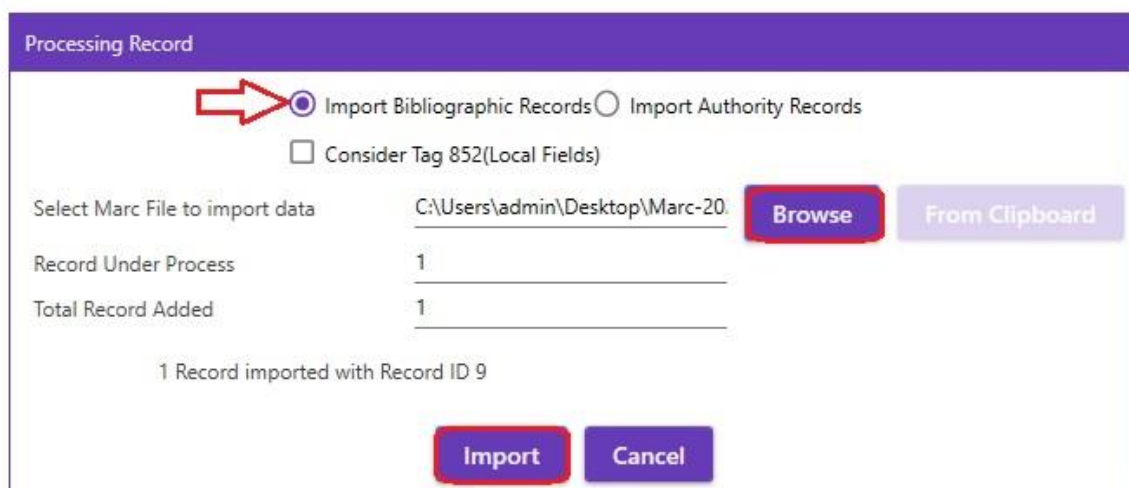
Record ID: 7684
New
Edit
Save
First
Previous
Next
Last

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:

Catalogue -> Data Export/Import -> MARC Data to SOUL(Import)



Processing Record

☒ Import Bibliographic Records ☐ Import Authority Records

☐ Consider Tag 852(Local Fields)

Select Marc File to import data C:\Users\admin\Desktop\Marc-20. **Browse** From Clipboard

Record Under Process 1

Total Record Added 1

1 Record imported with Record ID 9

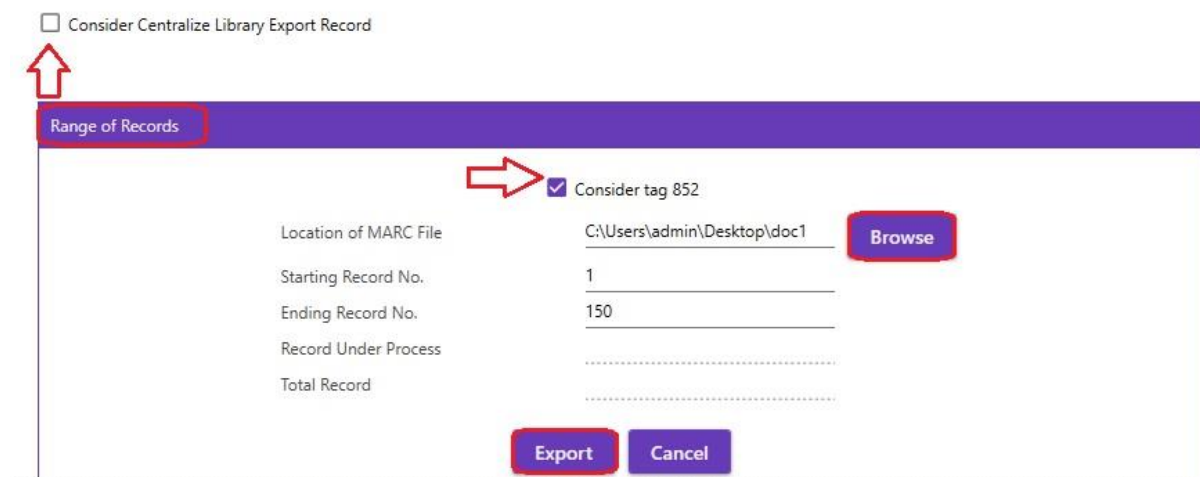
**Import** **Cancel**

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:

Catalogue -> Data Export/Import -> SOUL to MARC Data(Export)



☐ Consider Centralize Library Export Record

**Range of Records**

☒ Consider tag 852

Location of MARC File C:\Users\admin\Desktop\doc1 **Browse**

Starting Record No. 1

Ending Record No. 150

Record Under Process

Total Record


**Export** **Cancel**

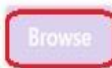
- To export Data from SOUL to MARC format follow the steps:  
Click on Export to marc → Enter the location of the marc file in which you want to export data → Enter starting record and ending record → click on export.

## CCF to MARC:

---



**Catalogue -> Data Import/Export -> CCF to MARC**

 ☒ Consider Tag852 (Local Fields)

Select ISO File to Import data C:\Users\admin\Desktop\record.is 

Processing Record

Total No. of record Added in Database

---

- 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:

---

**IMPORT FROM MARCXML to SOUL**

 ☒ Consider Tag852 (Local Fields)

Select XML File C:\Users\admin\Desktop\dcx.xlsx 

Processing Record

Total record imported

- 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:

**Catalogue -> Data Import/Export -> Add Accession No. to Imported Data (Set Location)**

Search By Title  Search

RecID	Title	Author	Edition	ClassNo
4	Dictionary of Library Science	KAWATRA, P S	Edition not present	2:(P111:4k) \
5	Dictionary of Library Science	KAWATRA, P S	Edition not present	2:(P111:4k) \
6	Dictionary of Library Science	KAWATRA, P S	Edition not present	2:(P111:4k) \
7	Dictionary of Library Science	KAWATRA, P S	Edition not present	2:(P111:4k) \

**Location(852)**

☐ Range

Copy No \$t 1      Shelving scheme       Shelving order

Accession No \$p 00005      Collect. Type \$b Reference      \*Coded Location \$f Main Library      \*Department Library Science      \*Supplier

Material Textual Docume      \*Class No. \$k 020.3      Location \$a First Floor      Budget Books      \*Invoice No.

Status Available      \*Book No. \$m KAW      Shelving Location \$c Rac18      Currency India Rupees      \*Invoice Dt.

Issue Restricted ☐      Price       Date of Acq

Save

- 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:

**Current Awareness Services**

**Search Parameter**

Subject Library science

Author Ranganathan

**Filter Parameter**

☒ From Date 07-07-2020 To 07-07-2020

Language English

Select Report Template Current Awareness

Show Report

**Current Awareness Services**

Accession No	Title	Author	ISBN
00003	Colon classification /	Ranganathan, S. R.	

Total No. Of Items 1

Printed On : 07/07/2020

**Bibliographic Service**

Search Parameter		Filter Parameter	
Subject	Library science	<input checked="" type="checkbox"/> Date From	07-07-2020 To 07-07-2020
Author	Ranganathan	Language	English
<b>Show Report</b>		Select report template	Current Awareness

AccessionNo	Title	Author	Publisher
00003	Colon classification /	Ranganathan, S. New DelhiEss R.	Ess Publication2017
Total No. Of Items			1

Printed On : 07/07/2020

- 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:

**Basic Report**

Search Parameter		Filter Parameter	
Select Report	By Record ID Between	<input type="checkbox"/> Date From	To
Record No From 1	To 4	<input type="checkbox"/> Type of Material	
		Select Template	Report Template
		<input type="checkbox"/> Tick To Print Accession Register	
<b>Search</b>			

AccessionNo	Title	Author	CallNumber	Publisher
00001	मेरे बचपन का भारत	राधा, एम. के.		AhmedabadNavjivan Publishing House
00002	Artificial intelligence	Rich, Elaine,	001.535,KNI	New DelhiMcGraw-Hill2019
00003	Colon classification The basic classification	Ranganathan, S. R.,	025.43, RAN	New DelhiEss Ess Publications2008
00005	Dictionary of Library Science by P.S Kawatra	KAWATRA, P S	020.3,KAW	New DelhiCrest Pub House2002
Total No. Of Items				1

Printed On : 30/06/2020

**Send Mail**

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

## Advance:

**Advanced Report**

Select Tag: 100 Main Entry - Personal Nam  
 Select Subfield: a Personal name (NR)  
 Query: Ranganathan  
 Select Operator: AND

Select Report Template: Report Template

**Search**

**Advance Report**

AccessionNo	Title	Author	CallNumber	Publisher
00003	Colon classification The basic classification	Ranganathan, S. R.,	025.43, RAN	New DelhiEss Ess Publications2008
Total No. Of Items			1	

Printed On : 30/06/2020

**Send Mail**

- 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:

**Spine Label**

Search Parameter: By Record ID Between  
 Filter Parameter: Date Form 06/07/2020 To 06/07/2020  
 Select fields to Display on Report: Accession No, Class No, Call No, Collection Type, Accession No(Barcode), Book No, Draw Line, Header

Select Label: Spine Label

**Search**

**Spine Label**

00001	891	GAN
00002	001.535	KNI
00003	025.43	RAN
00005	020.3	KAW

- 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:

**Catalogue Card Report**

Search Parameter		Filter Parameter	
Select Option	By Record ID Between	<input type="checkbox"/> Date Form	30-06-2020 To 30-06-2020
Record No From	1 To 3	<b>Search</b>	

Note : If you select option "Accession Nos." then enter multiple accession no's using comma (,) as a separator.

Text Books  
025.43  
RAN  
00003

Ranganathan, S. R.,  
Colon classification The basic classification - 6th ed - New  
Delhi Ess Ess Publications 2008  
124p 24cm  
9788170004233: 441.00

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

## Accession Register:

**Accession Register**

Search Parameter		Filter Parameter	
Select Option	By Record ID Between	<input type="checkbox"/> Date Form	30-06-2020 To 30-06-2020
Record No From	1 To 4	<input checked="" type="checkbox"/> Material Type	Textual Documents

**Field Selection**

<input checked="" type="checkbox"/> Accession No	<input checked="" type="checkbox"/> Date of Acquisition	<input checked="" type="checkbox"/> Invoice Date	<input checked="" type="checkbox"/> Title	<input checked="" type="checkbox"/> ISBN
<input checked="" type="checkbox"/> Class No	<input checked="" type="checkbox"/> Book No	<input checked="" type="checkbox"/> Invoice No	<input checked="" type="checkbox"/> Edition	<input type="checkbox"/> Status
<input checked="" type="checkbox"/> Budget	<input checked="" type="checkbox"/> Department	<input checked="" type="checkbox"/> Copy No	<input checked="" type="checkbox"/> Publisher	
<input checked="" type="checkbox"/> Collection Type	<input checked="" type="checkbox"/> Price	<input type="checkbox"/> User Name	<input checked="" type="checkbox"/> Call No	

**Export to tsv**

- 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.

-----XXX-----



## SOUL 3.0: Circulation Module

**Circulation**

Membership Transaction Inter Library Loan (ILL) Maintenance

New Member Copy Member Search Member Delete Member(s) Renew Member(s) Reports

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:

**New Member**

**Academic Information**

Category: Student Institute: Home Institute: Add Institutions

Department: Library Science Course/Designation: BLIS

**Member Information**

Personal Information Contact Information Guarantor Information (Optional) Hostel Information (Optional)

Surname: User 1 Status: Active

Forename: Library Gender: Male

Birth date: 10-03-1999 Date of Joining: 30-06-2020 Member Type: GENERAL

Member Code: ST02BL200001

☐ Same as Member Code

C:\Users\HRDLab07\Desktop\nitesh\member photo\BL-022.png MemberID: BL-021

**Payment Details**

Payment Information Other

Deposit Amount: 0.00 Receipt No: 0 Receipt Date: 16-06-2020

Membership Amount: 0.00 Receipt No: 0 Receipt Date: 16-06-2020

Maximum Due Amount: 0.00 Effective Date: 01-07-2020 Card Exp. Date: 30-06-2021

Remark:

Add Member Update Save Cancel

**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:


Copy Member

Enter Member Code / ID

ST02BL200001

Member Details

Member Name	Library User 1
Member Code	ST02BL200001
Department	Library Science
Category	Student
Current Due	0



Copy Member

- Enter Member Code/ID → Copy Member.

## Membership → Search Member:

**Member Search**

Search Member

Member Search Department Library Science Search

Select	Member Code	Member Name	Institute Name	Department	Category	Branch Name
<input checked="" type="checkbox"/>	ST02BL200001	Library User 1	Home Institute	Library Science	Student	BLIS
<input checked="" type="checkbox"/>	ST02ML200001	Library User 2	Home Institute	Library Science	Student	MLIS

Select All Show Member No Due Certificate

- 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:

**Delete Member/Group**

Single Group

Member ID ST02BL200001

**Member Details**

Member Name	Library User 1
Member Code	ST02BL200001
Department	Library Science
Category	Student
Overdue	0
Card Expiry Date	30-06-2021

Delete selected

- Single/Group → Mention member ID → Delete.



## Membership → Renew Members:

RENEW MEMBER

Single Group

Member ID ST02BL200001 Valid Upto 30-06-2023

Member Details

Member Name Library User 1

Member Code ST02BL200001

Department Library Science

Category Student

Overdue 0

Card Expiry Date 30-06-2021

Renewal

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

## Membership → Reports:

Circulation

Membership Transaction Inter Library Loan (ILL) Maintenance

New Member Copy Member Search Member Delete Member(s) Renew Member(s) Reports

Transactions -> No Due Certificate x

No Due Certificate

Membership Card

Member Listing

Member Barcode Listing

### 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:

≡ Circulation

Membership **Transaction** Inter Library Loan (ILL) Maintenance

Transaction Menu Search By Title Overdue Charges Book-bank Issue Reminder Circulation Group Stock Verification Member Login Book Transfer Reports

## Transaction → Transaction Menu:

Transaction Menu

Book/Member Details

Accession No 00003 ← Member Code/Member ID ST02BL200001 ←

Member Details

Member Name	Library User 1	Category	Student	Current Due	0
Member Code	ST02BL200001	Department	Library Science	Course Designation	BLIS
Member ID	BL-021	Item Issued	1	Total Allowed Books	10

Accession No	Book Status	Title	Author	Call No	Material	Issue Restricted	Issue Date	Due Date	R
00003	Issued	Colon classification	Ranganathan, S. R.	025.43, RAN	Textual Documents	N	01-07-2020	31-07-2020	

Remove Item Remove All Item(s)

Issued / Reserved Book Details

Borrowing Member Reservation Details

Member : ST02BL200001 || Library User 1 || Student || Library Science

Issue/Due Date : 01/07/2020 10:32:23 / 31/07/2020 10:32:23

Issue [F3]  
Return [F4]  
Renewal [F6]  
Reserve [F7]  
Issue (On-Premises)  
Return(On Premise)  
Lost  
Missing  
Damage  
Withdraw  
Reminder  
Over Due

- 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:

Search by Title

Issued Item(s) Artificial Search

Accession No	Book Title	Member Code	Forename	Surname	Department	Branch	Issue Date	Due Date
00002	Artificial intelligence	ST02BL200001	Library	User 1	Library Science	BUS	7/1/2020 10:48:36 AM	7/31/2020 11

Issued Item(s)

Code: ST02BL200001

Name: Library User 1

Department: Library Science Designation: BUS

Issue Date: 01/07/2020 10:48:36 Due Date: 31/07/2020 10:48:36

Address: Navrangpura

City: Ahmedabad Pin: 380009

Phone: 1234567890

- 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:

**BOOK BANK ISSUE**

Member Code: ST02BL200001 Accession No: 00003 Due Date: 31/12/2020

Book Title: Colon classification Book Price: 448.00

Max. Amount Allow: 10000.00 Max. Item Allowed: 10

**Member Details**

Member Code: ST02BL200001 Category: Student

Member Name: Library User 1 Member Type: GENERAL

Department: Library Science

Member Code Accession No Issue Date Price Due Date

Issue Return Issue/Return Report Print Issue Slip

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

## Transaction → Reminder:

**Reminder Mail**

Select Criteria: By Course-Designation (f) Search

Category: Student Institute Home Institute

Department: Library Science Course Designation: BLIS

Select	Accession	Member Code	Member First Name	Member Last Name	Member E-mail	Issue Date	Due Date
<input checked="" type="checkbox"/>	00001	ST02BL200001	Library	User 1	user1@example.com	01-07-2020	31-12-2020
<input checked="" type="checkbox"/>	00002	ST02BL200001	Library	User 1	user1@example.com	01-07-2020	31-12-2020
<input checked="" type="checkbox"/>	00003	ST02BL200001	Library	User 1	user1@example.com	01-07-2020	31-12-2020
<input checked="" type="checkbox"/>	00006	ST02BL200002	Library	User 2	user2@example.com	01-07-2020	14-12-2020

Send SMS Show Quick Mail

- 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:

**Group Circulation**

Group Details | Group Issue/Return

**New Group Details**

Select Group: Group 1

Member Code	Member Name	Group Name	Group Code
ST02BL200001	Library User 1	Group 1	200000

**Add Member** **Delete Member**  
**Add Group** **Delete Group**

**Group Details**

Group Name: Group 1 Member ID/Code: ST02BL200002

Member Code	Member Name	Institute Name	Department	Category Name	Branch Name	Member S
ST02BL200002	Library User 2	Home Institute	Library Science	Student	BLIS	A

**Remove Selected** **Clear Member** **Save**

- 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:

**Group Circulation**

Group Details | **Group Issue/Return**

Accession No: 00001 Select Group: Group 1 Due Date: 31/12/2020

Accession No	Book Status	Title	Author	Material	Issue Restricted
00001	Group Issue	मेरे सपनों का भारत	गांधी, एम. के.	Textual Documents	N

**Group Issue** **Group Return** **Remove Item** **Delete All** **Print Issue Slip**

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

## Transaction→ Stock Verification:

**Stock Verification**

Stock Location: Rac18  
Stock Verified By: Library staff 1  
Accession No: 00003

Select file to import Accession Nos.

Accession No	Book Status	Title	Author	Book Location
00001	Available	मेरे सपनों का भारत	गंधी, एम. के.,	Rac18
00002	Available	Artificial intelligence	Rich, Elaine,	Rac18
00003	Available	Colon classification	Ranganathan, S. R.,	Rac18

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:

**Member Log**

☐ Login/Logout Using Barcode Scanner

Member Code/Id: ST02BL200001

Welcome

Library (ST02BL200001)

- 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:

**Book Transfer**

Select Source Library: Central Library    Select Destination Library: Library Science Department

Transfer Date: 01/07/2020    Accession No: 00001

Buttons: Report, Remove Item, Remove All Item, **Transfer**, Receive

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

## Inter Library Loan (ILL):

**Circulation**

Membership    Transaction    **Inter Library Loan (ILL)**    Maintenance

ILL-Borrowing Book    ILL-Lending Book

## Inter Library Loan (ILL) → ILL Borrowing Book:

### ILL Borrowing Book → Request:

**ILL Request**

Request    Request To Library    Receiving Items On ILL    Arrival Reports    Issue    Reminder to Member    Return    Send to Library    List ILL

Member Code: ST03BS200001    Material: Textual Documents

Name: Library User 3

Title: Computer Networks

1st Author: Andrew S. Tanenbaum    Publication Year: 2013

2nd Author: David J. Wetherall    Date Of Request: 01/07/2020

Publisher: Pearson Education India

Library Name: Institute Library

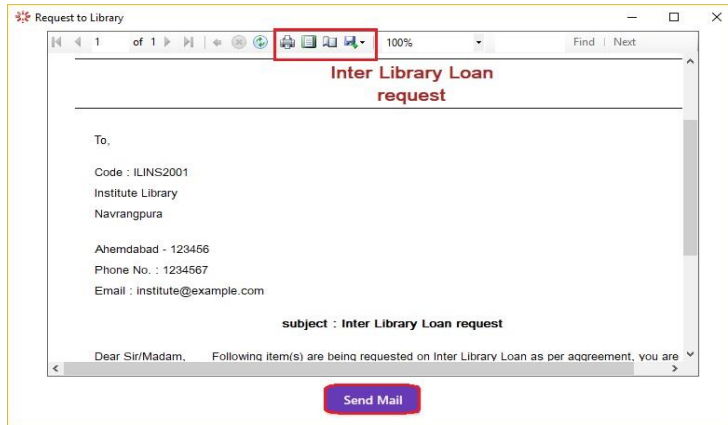
Member Code	Media Description	Book Title	Author 1	Author 2	Publisher	Publish Year	Request Date	Library Name
-------------	-------------------	------------	----------	----------	-----------	--------------	--------------	--------------

Buttons: Add, Update, **Save**, Delete, Clear

- 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:



**Request to Library**

Inter Library Loan request

To,

Code : ILINS2001  
Institute Library  
Navrangpura

Ahmedabad - 123456  
Phone No. : 1234567  
Email : institute@example.com

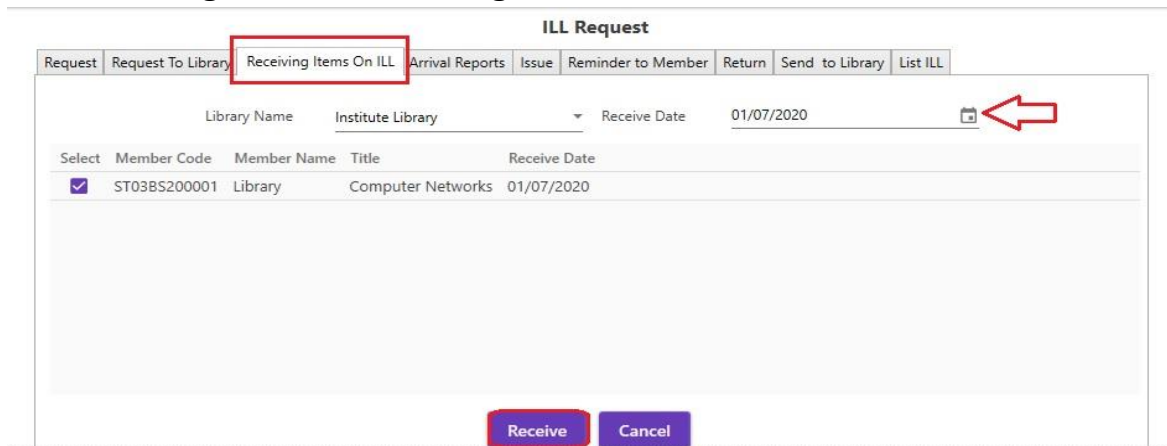
subject : Inter Library Loan request

Dear Sir/Madam, Following item(s) are being requested on Inter Library Loan as per agreement, you are

Send Mail

- Select Library name → Show.

## ILL Borrowing Book → Receiving Items on ILL:



**ILL Request**

Request Request To Library **Receiving Items On ILL** Arrival Reports Issue Reminder to Member Return Send to Library List ILL

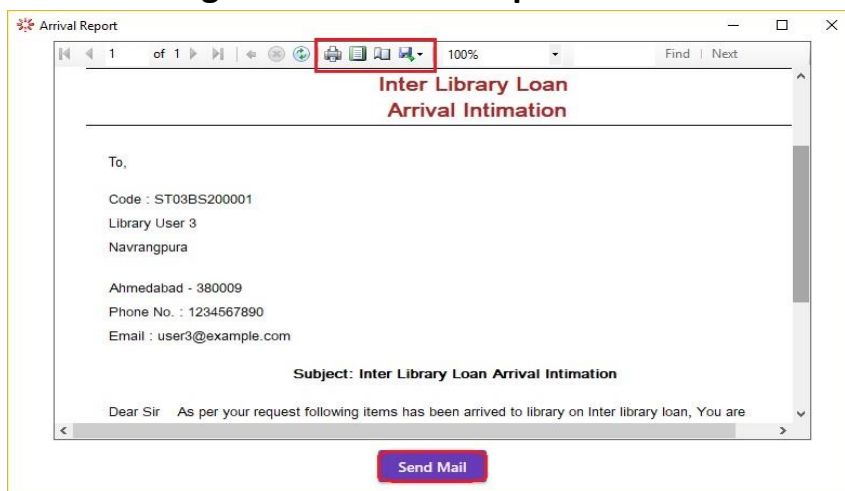
Library Name Institute Library Receive Date 01/07/2020

Select	Member Code	Member Name	Title	Receive Date
<input checked="" type="checkbox"/>	ST03BS200001	Library	Computer Networks	01/07/2020

Receive Cancel

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

## ILL Borrowing Book → Arrival Reports:



**Arrival Report**

Inter Library Loan Arrival Intimation

To,

Code : ST03BS200001  
Library User 3  
Navrangpura

Ahmedabad - 380009  
Phone No. : 1234567890  
Email : user3@example.com

Subject: Inter Library Loan Arrival Intimation

Dear Sir As per your request following items has been arrived to library on Inter library loan, You are

Send Mail

- Select the Library Name → Show.

## ILL Borrowing Book → Issue:

ILL Request

Request Request To Library Receiving Items On ILL Arrival Reports **Issue** Reminder to Member Return Send to Library List ILL

Member Code ST03BS200001 Name Library User 3

Select	Library Name	Title	Arrival Date	Library Code
<input checked="" type="checkbox"/>	Institute Library	Computer Networks	01/07/2020 00:00:00	ILINS2001

Issue Cancel

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

## ILL Borrowing Book → Reminder to Member:

Arrival Report

Reminder letter

To:

Code : ST03BS200001  
Library User 3  
Navrangpura  
Ahmedabad - 380009  
Phone No. : 1234567890  
Email : user3@example.com

Subject : Reminder letter

Dear Sir/Madam,  
This has reference to our orders as per following details, for supply of books. The delivery date is already over.  
You are requested to supply the same within 7 days, failing which order is liable to be cancelled.

Send Mail

- Reminder to Member → Add Member Code → Show.

## ILL Borrowing Book → Return:

ILL Request

Request Request To Library Receiving Items On ILL Arrival Reports Issue Reminder to Member **Return** Send to Library List ILL

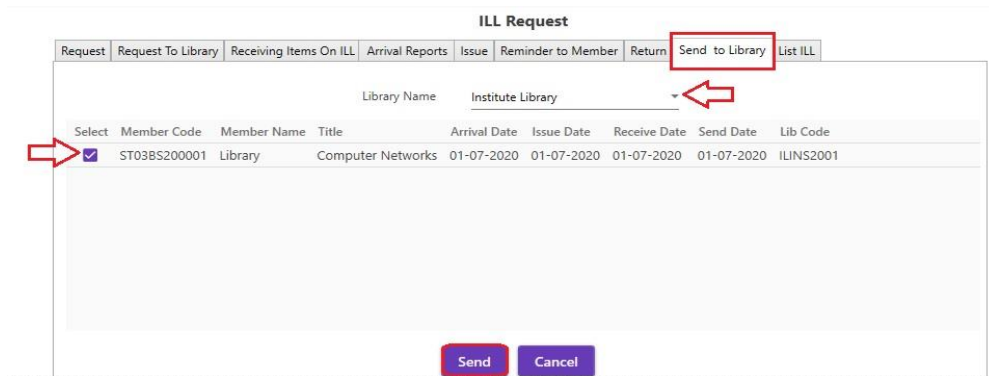
Member Code ST03BS200001 Name Library User 3

Select	Library Name	Title	Arrival Date	Issue Date	Library Code
<input checked="" type="checkbox"/>	Institute Library	Computer Networks	01-07-2020	01-07-2020	ILINS2001

Return Cancel

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

## ILL Borrowing Book → Send to Library:



**ILL Request**

Request | Request To Library | Receiving Items On ILL | Arrival Reports | Issue | Reminder to Member | Return | **Send to Library** | List ILL

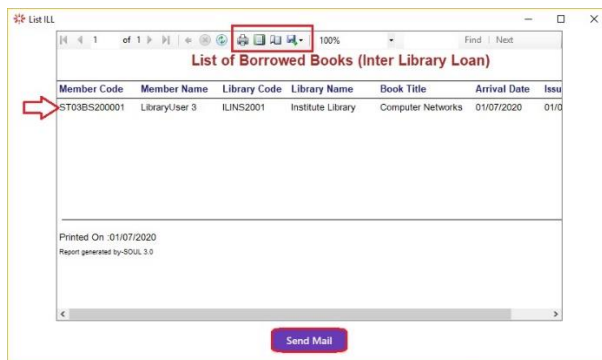
Library Name: Institute Library

Select	Member Code	Member Name	Title	Arrival Date	Issue Date	Receive Date	Send Date	Lib Code
<input checked="" type="checkbox"/>	ST03BS200001	Library	Computer Networks	01-07-2020	01-07-2020	01-07-2020	01-07-2020	ILINS2001

**Send** **Cancel**

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

## ILL Borrowing Book → List ILL:



**List ILL**

Member Code | Member Name | Library Code | Library Name | Book Title | Arrival Date | Issue Date

ST03BS200001	LibraryUser 3	ILINS2001	Institute Library	Computer Networks	01/07/2020	01/07/2020
--------------	---------------	-----------	-------------------	-------------------	------------	------------

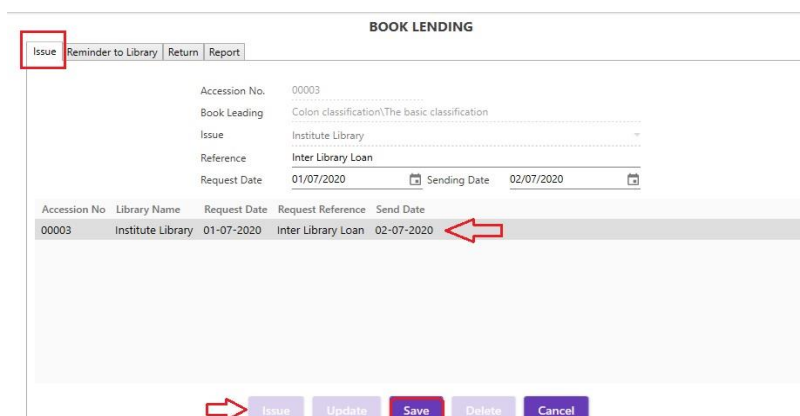
Printed On :01/07/2020  
Report generated by-SOUL 3.0

**Send Mail**

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

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

### ILL Lending Book → Issue:



**BOOK LENDING**

Issue | Reminder to Library | Return | Report

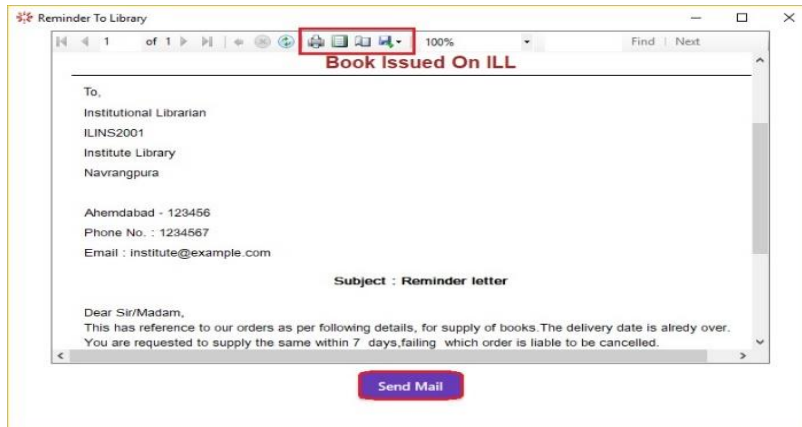
Accession No. 00003  
Book Leading Colon classification/The basic classification  
Issue Institute Library  
Reference Inter Library Loan  
Request Date 01/07/2020 Sending Date 02/07/2020

Accession No.	Library Name	Request Date	Request Reference	Send Date
00003	Institute Library	01-07-2020	Inter Library Loan	02-07-2020

**Issue** **Update** **Save** **Delete** **Cancel**

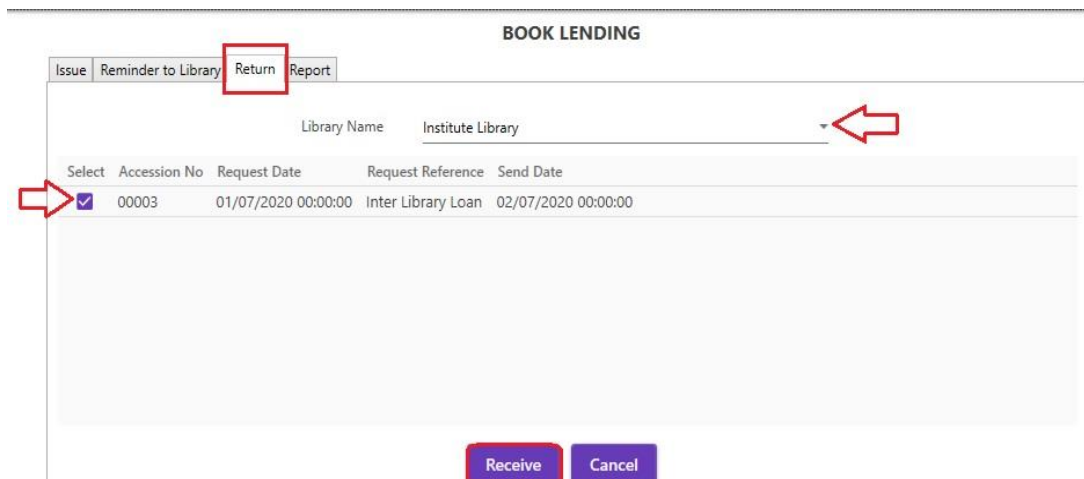
- Issue → Add Accession Number → Issue (Select the library from dropdown) → Give Reference → Request Date → Sending Date → Save.

## ILL Lending Book → Reminder to Library:



- Reminder to Library → Select Library Name → Show.

## ILL Lending Book → Return:



- Return → Select Library Name → Receive.

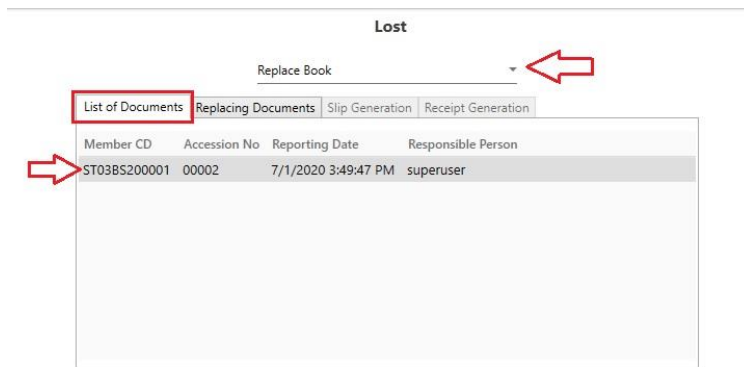
## ILL Lending Book → Report:

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

## Circulation -> Maintenance:



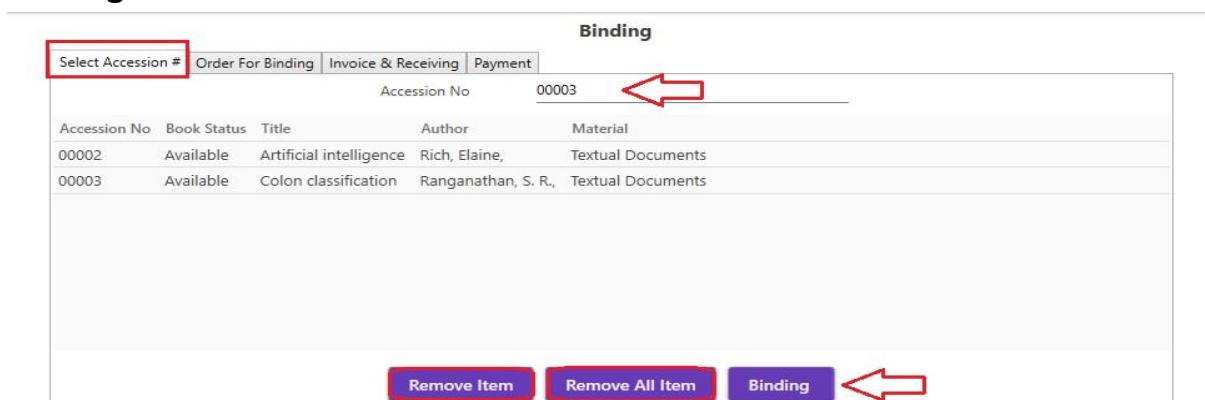
### Maintenance → Lost:



- 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:

**Binding**

Select Accession # **Order For Binding** Invoice & Receiving Payment

Order No: ORDN14 Budget Head: Books Expected Date: 07/07/2020  
 Binder: Binder Group Binding Type: Brown Price/DOC: 60

Select	No	Accession No	Title	Price
<input checked="" type="checkbox"/>	B3	00002	Artificial intelligence	0

**Save**

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

## Binding → Invoice & Receiving:

**Binding**

Select Accession # Order For Binding **Invoice & Receiving** Payment

Order No: ORDN14 Invoice Receive Date: 07/06/2020 Discount Amount: 0  
 Invoice#: INV14 Forwarding Date: 07/06/2020 Overdue Amount: 0  
 Invoice Date: 07/06/2020 Received Document: 2 Misc. Amount: 0  
 Order Document: 2 Invoice Amount: 120 Net Amount: 120

Select	No	Accession No	Title	Expiry Date	Price
<input checked="" type="checkbox"/>	B2	00003	Colon classification	07/07/2020	60
<input checked="" type="checkbox"/>	B3	00002	Artificial intelligence	07/07/2020	60

**Save**

- 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:

**Binding**

<b>Select Accession #</b>	<b>Order For Binding</b>	<b>Invoice &amp; Receiving</b>	<b>Payment</b>	
		Invoice No	INV14	Bank Name
		Payment Amount	120.0000	Branch Name
		Payment Date	07/06/2020	DD/Cheque
		Mode Of Payment	Demand Draft	Forward Date
		Forward Mode	Register Ad.	
		Remark		

Save

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

## Maintenance → Damaged:

**Damaged**

Accession No	00004			
Title	Artificial Intelligence			
Author	Rich, Elaine	Status	Damaged	

Accession No	Book Title	Status
00001	मेरे सपनों का भारत	Damaged
00005	Dictionary of Library Science	Damaged
00004	Artificial Intelligence	Damaged

Damaged
Repaired

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

## Maintenance → Missing:

**Missing**

<b>Missing Process</b>	<b>Found Process</b>				
Member Code	ST03BS200001	Accession No	00005	Title	Dictionary of Library Science
				Author	Status Available

Accession No	Missing Reporting By Member	Forename	Surname	Missing Date
00001	ST03BS200001	Library	User 3	01-07-2020
00004	ST03BS200001	Library	User 3	01-07-2020

Save

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



**Missing**

Missing Process

Found Process

Accession No	00004	Title	Artificial Intelligence
Status	Missing	Author	
Reported Member	ST03BS200001	Missing Date	01/07/2020
Trace By Member	Library Staff	Found Date	08/07/2020
Remark	Found in circulation area		

**Found**

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

## Maintenance → Withdraw:

**Withdraw**

Withdrawal Process

Re-Introduce

Accession No 00005

Accession No	Book Status	Title	Author	Material
00005	Available	Dictionary of Library Science	KAWATRA, P S	Textual Documents

**Remove**
**Remove All**
**Withdraw**

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

**Withdraw**

Withdrawal Process

Re-Introduce

Select	Accession No	Title	Status
<input checked="" type="checkbox"/>	00005	Dictionary of Library Science	WithDraw

**Available**

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

## Maintenance → Reports:

### Location Status:

Location Status

Select Library: all Select Status: Bindings

Printed On : 01/07/2020  
Report generated by: SOUL 3.0

Send Mail

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

### Maintenance:

Maintenance

Select Report

☐ Lost Book Report ☒ Missing Book Report ☐ Binding List Report ☐ Damage Book Report ☐ Withdraw Book Report

Date Between 01/07/2020 And 06/07/2020

Display

Missing Items

Accession No	Title	Missing Date	Reported by	Found Date	Found by
00004	Artificial Intelligence	01/07/2020		7/6/2020 12:00:00 AM	
00004	Artificial Intelligence	01/07/2020	ST03BS200001	7/6/2020 12:00:00 AM	
00006	Dictionary of Library Science	01/07/2020			
00001	मेरे सपनों का भारत	01/07/2020	ST03BS200001	7/6/2020 12:00:00 AM	

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

-----XXX-----



## SOUL 3.0: Acquisition Module

SOUL 3.0

**Acquisition**

Suggestions Orders Accessioning Payment

Request Gratis Item Select For Approval Approval Process Direct Approval Export And Delete Rejected Reports

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

**New Request**

**Requesters Detail**

Request No 1 Reference No REF1 Date 18/06/2020

Department Computer Science Request Status Requested

Requested By Library User 3 (ST03BS200001) Supplier

**Items Detail**

Title The Scientific edge: the Indian Scientist from Vedic to modern Duplicate Check

Author's First Name Jayant Vishnu Author's Last Name Narlikar

Publisher Penguin India-New Delhi Add New Publisher

Type of Material Textual Documents ISBN 9780143030287

Edition Year 2003

No of Copies 2 Price 220

Currency India Rupees Conversion Rate 1.00 Total 440

Budget Books(2020-2021)-31-03-2021 Ignore Budget

Remark

Add Delete Browse Save Clear

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**

Requesters Detail			
Request No	3	Reference No	REF3
Department	Library Science	Date	29/06/2020
Requested By	Library User 1 (ST02BL200001)	Request Status	Requested

Items Detail			
Title	Artificial Intelligence		
Author's First Name	Elaine	Author's Last Name	Rich
Publisher	McGraw-Hill-Noida	ISBN 9780070522633	
Type of Material	Textual Documents	Year	1990
Edition	3rd ed	Price	683
Requested Copies	2	Currency	India Rupees
Conversion Rate	1	Total	1366
Approval Date	29/06/2020	Approved Copies	1
Approved By	Librarian	Budget	Books(2020-2021)-31-03-202
Remark			

**Add   Delete   Browse   Save**

- 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:

**Receive Orders**

Supplier Name: Ess Ess Publications ☒ All Orders

Order No: ORD2

Enter items in Receive Now Column

Select	Title	Author	Publisher	ISBN/Year/Edition	Ordered Copies	Prev.Received	Receive Now
<input checked="" type="checkbox"/>	Colon Classification: The Basic Classification	S. R. Ranganathan	Ess Ess Publications	9788170004233 / 2008 / 6th ed	1	0	0

**Item Summary**

Title	Ordered Copies	Received Items	Pending Items
Colon Classification: The Basic Classification	1	0	1

**Select All** **Receive** **Receive Entire 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:

Accessioning of Items

☒ Regular Items ☐ Gratis Items Last Accession 0

Filter By

☐ Title ☒ Supplier Ess Ess Publications ☐ Receive Date 29-06-2020 To 29-06-2020 ☐ Order ORD1

Select	ID	Title	Author	Publisher	Edition	Price	ISBN	Acc No
<input checked="" type="checkbox"/>	1	Colon Classification: The Basic Classification	S. R. Ranganathan	Ess Ess Publications	6th ed	441.00	9788170004233	00003

Auto Assign

Collection Type: General

Last Accession No.:

Prefix or Suffix: G

Consider As: ☒ Prefix ☐ Suffix

Starting number:

Total Length: 0

- 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

≡ Acquisition

Suggestions Orders Accessioning **Payment**

Invoice Process Payment Process Refund Process Reports

### Invoice process:

Invoice Process

Payment Type: Regular

Supplier: Ess Ess Publications

Order No: ORD2

Invoice No: INV001

☐ All Orders

Date of Order: 29-06-2020

Invoice Date: 29-06-2020

Reference No: REFN1

Supplier Address

Govind Street, Daryaganj

New Delhi 110002

Delhi - India

Email: sales@example.com

Select	Title	Ord.Item(s)	Rec.Item(s)	Paid Item(s)	Currency	C.Rate	Price	Discount	Net Price
<input checked="" type="checkbox"/>	Colon Classification: The Basic Classification	1	1	0	India Rupees	1.00	441.00		441

Calculate Total Amount

Other Charges

Total Net Amount 441

Over All Discount % 0

MiscCharges 60

Rounded Of 0.00

Total Amount 501

Budget Books(2020:2021)

Available Amount 50000.00

⇒

Select All

Process Invoice

Title-wise Discount

- 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:

The screenshot shows the 'Payment Process' window with the 'Payment Process' tab selected. A table lists invoice details with a red arrow pointing to the 'Total Amount' column.

Invoice No	Order No	Invoice Date	Total Amount
INV001	ORD2	29-06-2020	501.00

Below the table is the 'Payment Details' section with the following fields:

- Reference No: RXXXXX
- Cheque/DD/UTR No: 5XXXXX
- Bank Name: State Bank of India
- Branch: Infocity
- Total Invoice Amount: 501
- Bank Charges: 0.00
- Total Amount: 501
- Forwarding Remarks: (empty)

At the bottom are three buttons: 'Add Invoice', 'Remove Invoice', and 'Process Payment'. A red arrow points to the 'Payment By Demand Draft' dropdown menu.

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:

The screenshot shows the 'Refund Process (A)' window. The 'Refund Process' table has a red arrow pointing to the 'Order' dropdown menu.

Select	Invoice No	Order No	Invoice Date	Net Amount
<input checked="" type="checkbox"/>	INVN5	ORD5	07-07-2020	448.00

Below the table are 'Ok' and 'Close' buttons. A red arrow points to the 'Add Item' button.

Below the 'Add Item' button is the 'Refund Process (A)' table:

Order No	Invoice No	Invoice Amt	Invoice Date
ORD5	INVN5	448.00	07-07-2020

Below this table is the 'Payment Details' section with the following fields:

- Payment By: Demand Draft
- Cheque/DD/UTR No: XX1234
- Bank Name: SBI
- Branch: Infocity
- Total Amount: 448

At the bottom are three buttons: 'Add Item', 'Remove Item', and 'Save'. A red arrow points to the 'Payment By Demand Draft' dropdown menu.

→ 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 Item**

Request No	2	Reference No		Status	Gifted
Gifted By	Mr. XYZ	Date	22/06/2020		


**Items Detail**

Title	Vikram Sarabhai: A Life				
Author's First Name	Amrita	Author's Last Name	Shah		
Publisher	Penguin India			<b>Add New Publisher</b>	
Type of Material	Textual Documents		ISBN	9780670999514	
Edition			Year	2007	
No of Copies	1		Price	330	
Currency	India Rupees	Conversion Rate	1.00	Total	330
Remark					


**Add From Existing   Add   Browse   Delete   Save**

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

**Select For Approval**

 Filter All
 ☐ Department
 ☐ Budget

Select	Title	Author	Requester	Edition	Publisher	ISBN	Price	Department	Request Date
<input checked="" type="checkbox"/>	The Scientific edge: the Indian Scientist from Vedic to modern times	Jayant Vishnu Narlikar	Library User 3 (ST03BS200001)		Penguin India	9780143030287	220.00	Computer Science	18-06-2020



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 dropdown menu → Display.

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

--XXX--

# SOUL 3.0: Serials Control Module

☰ Serials Control

**Titles** | Suggestions | Subscription | Payment | Check-In | Commercial Binding | In-House Binding

MARC21 Entry/Edit | Title Entry | Title Update | Article Indexing | Reports

## Titles → MARC21 Entry/Edit:

**Marc 21 Entry/Edit**

Main Entry | Optional Entry

Leader  ncs a22 1u 4500

Modify   n |r|p|r| z|||l|0

Modify

**Title**

Title Statement(245)
Key Title(222)
Publication Distribution etc.(260)
Computer File Characteristics(256)
Varying Form of Title(246)
Former Title(247)
Abbreviated Title(210)

Title added entry

Nonfiling characters

Title \$a

Number of part \$n

Remainder of Title \$b

Statement of responsibility \$c

Name of part \$p

Current Publication Frequency (310)
Coden Designation (030)

Frequency \$a

Date \$b

Coden Designation \$a

**ISSN (022)**

Level of international interest

ISSN \$a

**Holding Institution (850)**

Holding Institution \$a

**Location (852)**

☐ Range

Copy No \$t

Shelving sche

Shelving ordr

Accession No \$p

Collect. Type \$b

Coded Location \$f

Department

Supplier

Material

Class No. \$k

Location \$a

Budget

Invoice No.

Status

Book No. \$m

Shelving Location \$c

Currency

Invoice Dt.

Issue Restricted ☐

Price

Date of Acq

## 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:

**Title Entry**

1 of 2
2 of 2

<b>Title</b> Journal of Pure and Applied Algebra	
<b>Code</b> J0001	<b>Bound (Y/N)</b> N
<b>Annual Index (Y/N)</b> N	<b>Subscription Type</b> Subscription
<b>Abbreviated title</b> 	
<b>Department</b> Mathematics	<b>Subject</b> Mathematics
<b>Language</b> English	<b>Physical Media</b> Monographic Serials
<b>ISSN</b> 0022-4049	<b>Class No.</b> 510
<b>CODEN</b> JPAA2	<b>Location</b> Amsterdam
<b>Publisher</b> Book Publisher	<b>Place</b> Ahmedabad
<b>Country</b> India	
<input type="checkbox"/> Publisher is Supplier	
<b>Supplier</b> Book Supplier	<b>Place</b> Ahmedabad
<b>Country</b> India	
<b>Receipt Mode</b> Agent	<b>Budget</b> Serials(2020:2021)
<b>Currency</b> India Rupees	<b>Conversion</b> 1.00
<b>Original Price</b> 8000	<b>Price (Rs.)</b> 8000.00

Add Save Delete

### 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:**

**Title Entry**

1 of 2
2 of 2

**Delivery Mode** Courier ▼  
**Volume From** 224 **To** 224  
**Subscription From** 01/01/2020 📅 **To** 31/12/2020 📅  
**Parallel title**   
**Other Title**   
**Subject Keyword(s)**   
**URL Address**  https://www.sciencedirect.com/journal/journal-of-pure-and-applied-algebra  
**Note**

**Status** Active ▼  
**Frequency** Monthly ▼  
**Issue From** 1 **To** 12  
**Lead Time** 4  
**Issue/Volume** 12  
**Date of Publication** 01/01/2020 📅  
**Edition** Asian ▼  
**Language** English ▼

Add
Save
Delete

- 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**

Title

Code No	Title	ISSN
J0001	Journal of Pure and Applied Algebra	0022-4049

Browse

- 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:**

Leader	Serial	Fixed Field (006/8)	Serials	200702i0000000000bn1m
<div>Host Item Entry (773)</div>				
Search Host Item (773 \$t)		OK	Volume No - Issue No (773 \$g)	
<div>Holding Institute(850)</div>				
Holding Institution \$a				
<div>Title Statement (245)</div>				
Title added entry	0	Nonfiling characters	0	
Title \$a	Journal of Pure and Applied Algebra		Number of part \$n	
Remainder of Title \$b	Statement of responsibility \$c	Name of part \$p		
Attachment				
<div>Personal Name</div>				
Personal name(100/700)	Type of personal name entry element	Type of added entry/Thesaurus	<input type="checkbox"/> Added Entry	
Personal name \$a	Dates associated with a name \$d			
Relator term \$e	Fuller form of name \$q			

- 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:**

**Title Report**

Parameter Budget Head Filter value Serials **Display**

1 of 1 100% Find Next

**Title Report**  
Report by Budget Head = Serials

Code No	Title	ISSN No.	Publisher	Suplier	Department	Frequency
J0001	Journal of Pure and Applied Algebra	0022-4049	Book Publisher	Book Supplier	Mathematics	Monthly
T0001	The Indian Express		Book Publisher	Book Supplier	Library Science	Daily

Printed On : 02/07/2020 1/1  
Report generated by-SOUL 3.0

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

**Titles → Reports → Titles Holding Report:**

**Title Holding Report**

Parameter Department Filter value Mathematics **Display**

1 of 1 100% Find Next

**Title Holding Report**  
Report by Department = Mathematics

Title	Publisher	Available Issues	Missing Issues	Remarks
Journal of Pure and Applied Algebra	Book Publisher	Vol. 224, Issue 1,2,3		

Printed On : 02/07/2020 1/1  
Report generated by-SOUL 3.0

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

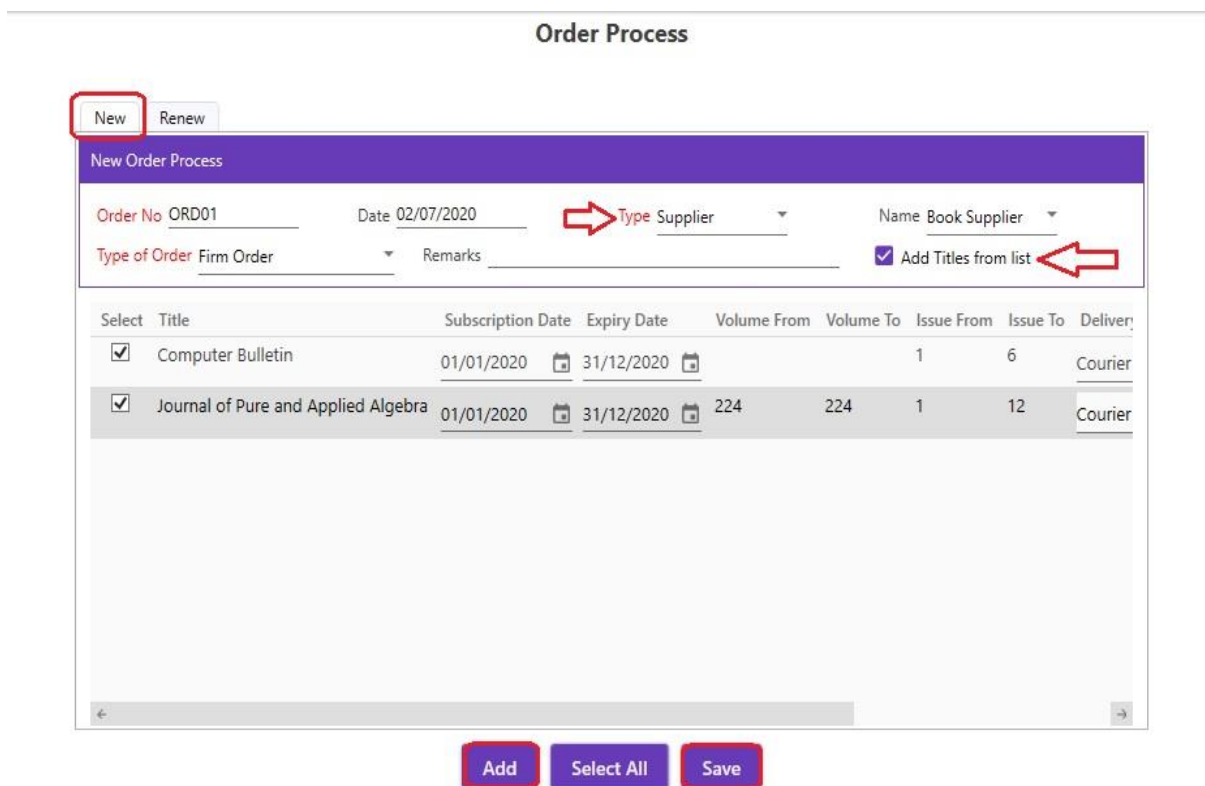
## Subscription:



The screenshot shows the 'Serials Control' menu. The 'Subscription' option is highlighted with a red box. Below the main menu, there are sub-menus: 'Titles', 'Suggestions', 'Subscription', 'Payment', 'Check-In', 'Commercial Binding', and 'In-House Binding'. At the bottom, there are three buttons: 'Order Process', 'Order Cancellation', and 'Reports'.

## Subscription → Order Processing:

## Firm Order:



The screenshot shows the 'Order Process' form. The 'New' button is highlighted with a red box. The form contains the following fields:

- Order No: ORD01
- Date: 02/07/2020
- Type: Supplier (indicated by a red arrow pointing to the dropdown)
- Name: Book Supplier (indicated by a red arrow pointing to the dropdown)
- Type of Order: Firm Order
- Remarks: (empty)
- ☒ Add Titles from list (indicated by a red arrow pointing to the checkbox)

Below the form is a table with the following columns: Select, Title, Subscription Date, Expiry Date, Volume From, Volume To, Issue From, Issue To, and Delivery. The table contains two rows of data:

Select	Title	Subscription Date	Expiry Date	Volume From	Volume To	Issue From	Issue To	Delivery
<input checked="" type="checkbox"/>	Computer Bulletin	01/01/2020	31/12/2020			1	6	Courier
<input checked="" type="checkbox"/>	Journal of Pure and Applied Algebra	01/01/2020	31/12/2020	224	224	1	12	Courier

At the bottom of the form are three buttons: 'Add', 'Select All', and 'Save'.

- 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
Renew

New Order Process

Order No ORD2
Date 02/07/2020
Type Supplier
Name Book Supplier

Type of Order Standing Order
Remarks 
☒ Add Titles from list

Select	Title	Subscription Date	Expiry Date	Volume From	Volume To	Issue From	Issue To	Delivery Type	Price
<input checked="" type="checkbox"/>	The Indian Express	01/01/2020	31/12/2020	89	89	1	366	Hand Delivery	1199

×

Enter Price/Issue

Enter price/issue for title The Indian Express

OK

Cancel

Add
Select All
Save

- 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.

## Subsction → Order Cancellation:

**Order Cancellation**

---

Order No ORD01
Cancellation Date 02/07/2020
☐ Cancel Whole Order

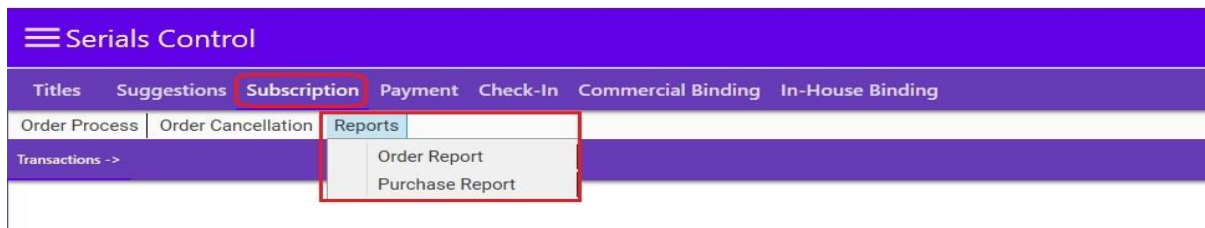
Order Date 02/07/2020
Order Type Firm Order
Remarks

Select	Title	Subscription Date	Expiry Date	Volume From	Volume To	Issue From	Issue To	Deliver
<input checked="" type="checkbox"/>	Journal of Pure and	01-01-2020	31-12-2020	224	224	1	12	Cou

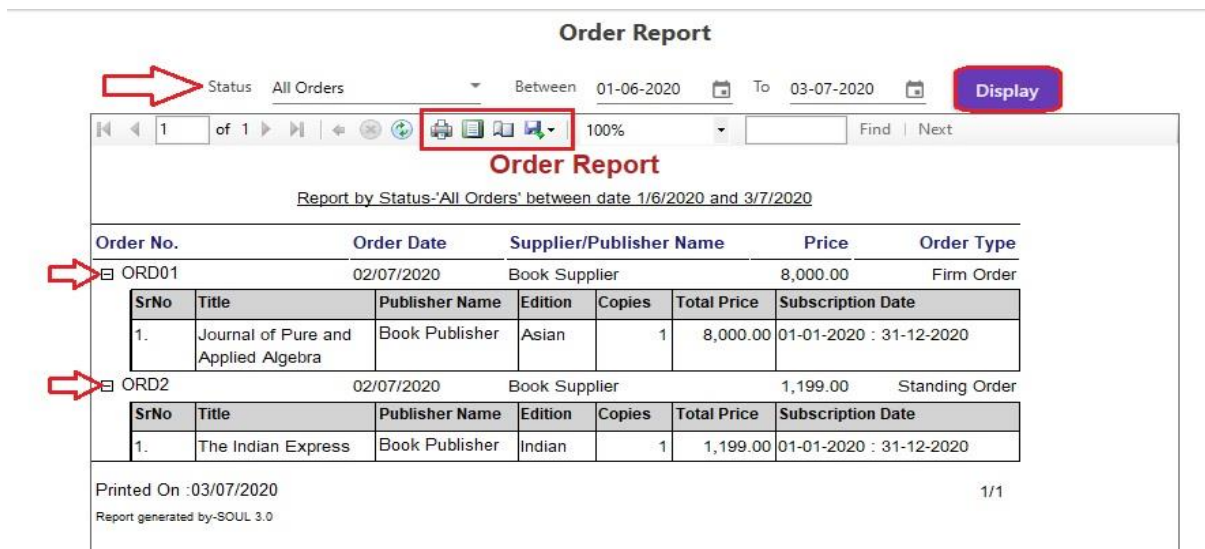
Select All
Cancel Order

- 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:

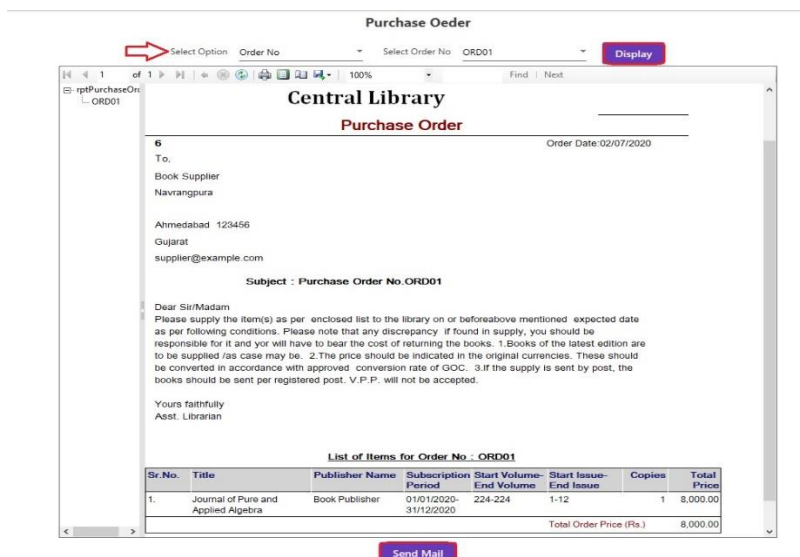


## Reports → Order Report:



- 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:

Serials Control

Titles Suggestions Subscription **Payment** Check-In Commercial Binding In-House Binding

Invoice Process Payment Process Refund Process Reports

## Payment → Invoice Process:

Invoice Process

All Order Standing Orders

Invoice Processing

Publisher/Supplier Book Supplier Search Invoice No Invoice Date 02/07/2020

Invoice Details

Title	Order No	Start Date	End Date	Price	Handling Charges	Postage Charges	Currency	Conv Rate	Discount	Net Price	Copies
browse orders											
Book Supplier											
Order No. ORD01											
<input checked="" type="checkbox"/>	Journal of Pure and Applied Algebra	01-01-2020	31-12-2020	224	224	1					

Miscellaneous Charges On Net Amount

Budget Postage Charge Net Amount In INR Total Net Amount

Save

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

Invoice Process

All Order Standing Orders

Invoice Processing

Publisher/Supplier Book Supplier Search Invoice No INV01 Invoice Date 02/07/2020

Invoice Details

Title	Order No	Start Date	End Date	Price	Handling Charges	Postage Charges	Currency	Conv Ra
Journal of Pure and Applied Algebra	ORD01	01-01-2020	31-12-2020	8000	0	0	India Rupees	1

Calculate Total Amount Remove from List

Miscellaneous Charges On Net Amount

Budget Serials(2020:2021) Heading Charges 0.0

Postage Charge 0.0

Net Amount In INR 8000 Total Net Amount 8000

Save

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

## Payment → Payment Process:

**Payment Process (S)**

Select: Vendor Publisher/Supplier: Book Supplier

Invoice Details

Select	Invoice No	Order No	Invoice Date	Order Date	Net Amount	Amount Paid	Amt Payable	Remaining Amt
<input checked="" type="checkbox"/>	INV01		02-07-2020	02-07-2020	8000	0	8000	0

Calculate

Payment Details

Payment By: Demand Draft  
 Payment Date: 02/07/2020  
 Total Amount: 8000

Branch Name: INFOCITY  
 Bank's Name: SBI  
 Cheque/DD/UTR no.: 123XYZ

Save

- 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:

**Serials Control**

Titles Suggestions Subscription **Payment** Check-In Commercial Binding In-House Binding

Invoice Process (S) Payment Process (S) Refund Process (S) **Reports**

Transactions ->

- Forwarding to Account (S)
- Forwarding to Vendor (S)
- Invoice Report (S)
- Payment Report (S)
- Refund Report (S)

## 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 to Account (S)**

Select option Invoice No Select Invoice No INV01 **Display**

1 of 1 100% Find | Next

# Home Institute

Central Library  
Forwarding Letter to Account Section

3  
To,  
Account Section,  
Home University  
Infocity  
  
Gandhinagar-123456  
library@example.com

**Subject : Request for Payment**

Dear Sir/Madam We have received invoices with following details, It is being requested to process the payment for the same. Librarian

Invoice No	Invoice Date	Vendor Name-Place	Total Invoice Amount
INV01	02/07/2020	Book Supplier - Ahmedabad	8,000.00

Title	Price	Copies	Order No
Journal of Pure and Applied Algebra	8,000.00	1	ORD01

Total Price 8,000.00

**Send Mail**

## Forwarding Letter to Vendor:

**Forwarding to Vendor (S)**

Select option Invoice No Select Invoice No INV01 **Display**

1 of 1 100% Find | Next

# Home Institute

Central Library  
Forwarding Letter to Vendor

1  
To,  
Book Supplier  
Navrangpura  
  
Ahmedabad 123456  
Gandhinagar-123456  
supplier@example.com

**Subject : Forwarding Letter for Payment**

Dear Sir/Madam We have received invoices with following details, It is being requested to process the payment for the same. Librarian

Invoice No	Invoice Date	Vendor Name-Place	Total Invoice Amount
INV01	02/07/2020	Book Supplier - Ahmedabad	8,000.00

Title	Price	Copies	Order No
Journal of Pure and Applied Algebra	8,000.00	1	ORD01

Total Price 8,000.00

**Send Mail**




## Check In:

 Serials Control

[Titles](#) [Suggestions](#) [Subscription](#) [Payment](#) [Check-In](#) [Commercial Binding](#) [In-House Binding](#)

[Schedule Generation](#) [Non Receipt Process](#) [Check In Detail](#) [Remove Received](#) [Reports](#)

## Schedule Generation:


 ☒ Generate New Schedule ☐ Modify/Delete Schedule

Filter Title

Title	Start Date	End Date	Start Volume	Start Issue	End Volume	End Iss
Journal of Pure and Applied Algebra	01-01-2020	31-12-2020	224	1	224	12
The Indian Express	01-01-2020	31-12-2020	89	1	89	366

Generate/Modify Schedule

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

 Schedule Generation

**Schedule Generation**

**Title Detail**

TitleJournal of Pure and Applied AlgebraISSN0022-4049

FrequencyMonthly

PublisherBook PublisherCountryIndia

PlaceAhmedabad

**Schedule Detail**

Volume No. From224To224Total Volume(s)1Volume Prefix

No. of Copy1

Issue No. From1To12Total Issue(s)12Issue Prefix

Lead Time4

Issue(s)/Volume121st Issue Publication Date01/01/2020

End Date31/12/2020

Delivery ModeCourierIssue(s)/First Volume

Start Issue no for first Volume

☐ First Volume is not full☒ Repeat Issue No with each Volume no

☒ Reflect Changes into Master Database

Volume	Issue	Publication Date	Expected Date	Status	Receipt Date	Remark/Note
224	1	01/01/2020	05/01/2020	Expected		
224	2	01/02/2020	05/02/2020	Expected		

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 Detail**

Title: Journal of Pure and Applied Algebra | Publisher: Book Publisher | ISSN: 0022-4049 | Frequency: Monthly | Country: India | Place: Ahmedabad

Volume	Issue	Publication Date	Expected Date	Status	Receipt Date	Accession No	Allow Issue/Return	Remark/Note
224	1	01-01-2020	05-01-2020	Received	03/01/2020		No	
224	2	01-02-2020	05-02-2020	Received	04/02/2020		No	
224	3	01-03-2020	05-03-2020	Received	06/03/2020		Yes	
224	4	01-04-2020	05-04-2020	Received	03/04/2020		Yes	
224	5	01-05-2020	05-05-2020	Non-Received	07/05/2020			
224	6	01-06-2020	05-06-2020	Expected	02/07/2020			

Add Save Delete First Next Previous Last

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**

☐ Display All ☒ Filter

Filter

☒ Title: Journal of Pure and Applied Algebra

☐ Received Between: [ ] And [ ]

Search

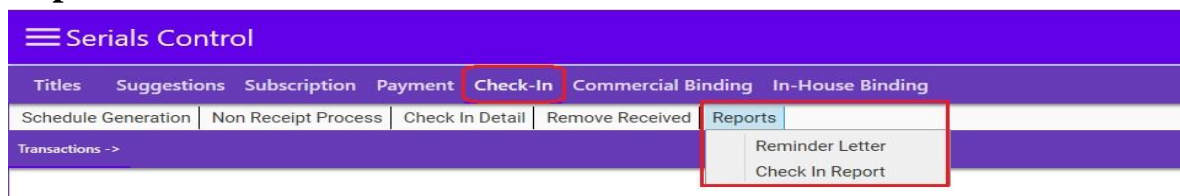
Title	Volume	Issue	Date of Publication	Expected Date	Received
Journal of Pure and Applied Algebra	224	1	01-01-2020	05-01-2020	03-01-2020
Journal of Pure and Applied Algebra	224	2	01-02-2020	05-02-2020	04-02-2020
Journal of Pure and Applied Algebra	224	3	01-03-2020	05-03-2020	06-03-2020
Journal of Pure and Applied Algebra	224	4	01-04-2020	05-04-2020	03-04-2020

Export & Delete

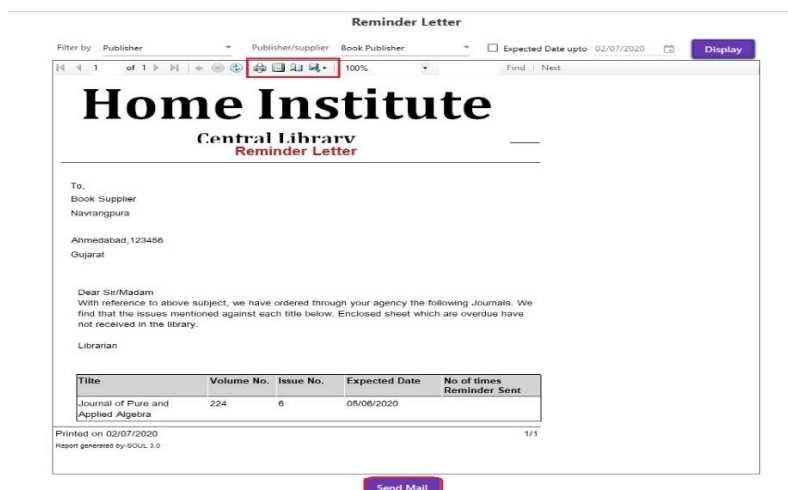
Remove Received → Filter either by Title or Received between and date → Search → Export & Delete.



## Reports:

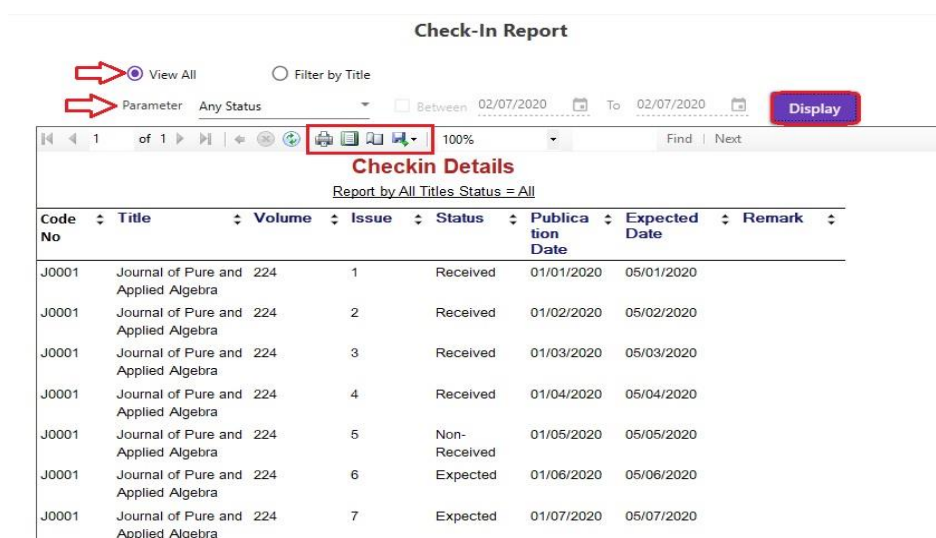


## Reports → Reminder Letter:



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:

Serials Control

Titles

Suggestions

Subscription

Payment

Check-In

Commercial Binding

In-House Binding

Preparation of Sets

Order Process

Receiving

Invoice Process

Payment

Reports

## Commercial Binding → Preparation of Sets:

Preparation of Sets

Set Details

Set No

S01

Received On/Before

02/07/2020

Search

Title

Journal of Pure and Applied Algebra

ISSN

0022-4049

Frequency

Monthly

Book Publisher

Place

Ahmedabad

Country

India

Check	Volume	Issue	Sr. No	Publication Date	Receipt Date	Status	Remark/Note
<input checked="" type="checkbox"/>	224	1	1	01/01/2020	01/03/2020	Received	
<input checked="" type="checkbox"/>	224	2	2	02/01/2020	02/04/2020	Received	
<input checked="" type="checkbox"/>	224	3	3	03/01/2020	03/06/2020	Received	
<input checked="" type="checkbox"/>	224	4	4	04/01/2020	04/03/2020	Received	

Binding Details

Binding Type

Cloth Binding

Binding Colour

Brown

Embossing Type

Gold

Embossing Text

Journal of Pure

First Page

1

Last Page

256

Index (Y/N)

N

Remark

Retrieve

Save

Select All

Add

Delete

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 No.

ORDN123

Date Of Order

03/07/2020

Expected Date

07/07/2020

Binder Name

Binder Group

Budget Head

Serials(2020:2021)

S01 - Journal of Pure and Applied Algebra

Check	Set Value	Set Price	Set No	Bind Type	Binding Colour	Emboss Type	Order Remark
<input checked="" type="checkbox"/>	2666.67		S01	Cloth Binding	Brown	Gold	

Remark

Retrieve

Save

Delete

First

Next

Previous

Last

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 (SC)

In House Receiving

Order No.

ORDN123

Binder

Binder Group

Last Accession No.

Check	Set No	Accession No	Accession Date	Classification No	Location	Starting Page
<input checked="" type="checkbox"/>	S01		03/07/2020	025.43	First Floor	1

Retrieve

Save

Select All

Auto Assign

Delete

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

## Commercial Binding → Invoice Process:

**Invoice Process (SC)**

**INVOICE PROCES**

Invoice No: INVN123      Date Of Invoice: 03/07/2020

Binder:      Binder Group:      **Add Order**

Order No	Send Date	Receipt Date	Budget Code	Price	Overdue Fine
----------	-----------	--------------	-------------	-------	--------------

bindername

Binder Name:      Binder Group:

**Binder Name**

Order No	Receipt No	Send Date
<input checked="" type="checkbox"/>	ORDN123	03-07-2020

**Save**      **Select All**      **Cancel**

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

**Invoice Process (SC)**

**INVOICE PROCES**

Invoice No: INVN123      Date Of Invoice: 06/07/2020

Binder:      Binder Group:      **Add Order**

Order No	Send Date	Receipt Date	Budget Code	Price	Overdue Fine
<input checked="" type="checkbox"/>	ORDN123	03-07-2020	03-07-2020	Serials(2020:2021)	150.0000

Forward No: 154      Forward Date: 07/07/2020      To Whom:      **Calculate**

Percentage Discount: 0      Misc. Amount: 0

Invoice Amount: 150      Net Amount: 150

**Save**      **Select All**

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

## Commercial Binding → Payment:

**Payment (SC)**

☒ Display All
☐ Filter by
Binder Name

Check	Invoice No	Invoice Date	Order No	Net Amount	Paid Amount	Amount payable	Payment Date
<input checked="" type="checkbox"/>	INVN123	06-07-2020	ORDN123	150.0000			07/07/2020

**Payment Details**

Receipt Note No

Receipt Note Date

Pay mode

Cheque/Draft No

Bank Name

Branch

Bank Charges

Date Of Cheque/Draft

**Forward Details**

Reference No  Date

Mode

Remark

**Acknowledgement Details**

Reference No  Date

Remark

Save

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:

☰

Serials Control

Titles
Suggestions
Subscription
Payment
Check-In
Commercial Binding
In-House Binding

Preparation of Sets (SC)
Order Process (SC)
Receiving (SC)
Invoice Process (SC)
Payment (SC)
Reports

Transactions ->

Reminder To Binder (SC)

Binding Report (SC)

Binding Purchase Order (SC)

Bound Volume Label (SC)

## 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 Title

Parameter: **Binderwise**    Value: **Binder Group**    **Display**

1 of 1    100%    Find | Next

**Binding Report**  
Report by All titles and And Binderwise

Set No.	Binder Name	Budget Name	Price Order No.	Remark
☐ S01	Binder Group	Serials	150.0000	ORDN123
<b>Title</b>		<b>Volume No.</b>	<b>Issue No.</b>	
Journal of Pure and Applied Algebra		224	1	
Journal of Pure and Applied Algebra		224	2	
Journal of Pure and Applied Algebra		224	3	
Journal of Pure and Applied Algebra		224	4	

Printed On : 03/07/2020    1/1  
Report generated by-SOUL 3.0

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   Binder   Select Binder   Binder Group   ←   Display

1 of 1   100%   Find | Next

Sr. No	J0001
Volume, Issue No. - Month/Yr.	224 ,1- 1/2020
	224 ,2- 1/2020
	224 ,3- 1/2020
	224 ,4- 1/2020
Price(Rs.)	2,816.67
Accession No.	00009
Class No.	020.43

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

--XXXXX--