Table of Contents

Selecting the Softlink Alice modules to suit your library needs	2
Getting Started	3
Minimum Hardware Requirements	
Optional Hardware and Software	
Installation	
motaliation	J
Beginning the Guided Tour	4
Entering Data	
Entering Cofflink Alice	4
Entering Softlink Alice	
First Login	4
Inquiry Module	5
Search	
Search Criteria	
Availability Detail	
Quick Searches	
QuickPic	10
Circulation	44
Circulation	
Lending Items	
Returning Items	
Searching for Patrons	
Finding Loan information	
Reserving Items	
Fines	
Paying Fines	12
Favourites	12
Borrower	13
Changing Barcodes	13
Adding a Student	
Maintaining Borrower Records	
Reversing Maintenance	
Removing Records	
Management	15
Adding Resources	
Adding Additional Copies	
Creating MARC Records	
Changing Barcodes	
Cataloguing Web Sites	
Odialoguing Web Oiles	10
Periodicals	17
	••
Softlink Alice Standard Features	18
Help	
Stocktake	
Email	
Reports	
Security Multi-Tasking	
wuti- asking	10
Additional Softlink Alice Modules	19
AND THE POLITICAL PROPERTY OF THE PROPERTY OF	
Softlink Services	20
Epilogue	20
Uninstalling the Demo	

Softlink Alice

The library management software solution for your library

Selecting the modules to suit your library needs

There are many modules and services available to choose from – but which ones are ideal for your library? To assist with your selection, Softlink has developed the following guide. Depending on the specialised functions performed in your library you may need to select extra or fewer modules than those suggested.

Primary School Libraries

Softlink Alice Modules:	Page
Management	14
Circulation	10
Inquiry (incl. Quick Search)	5
QuickPic	9
Book Wizard	18
Book Wizard Control	18
Rapid Retrospective	18
Secure Web Browser	18
Softlink Services:	
Data Conversion - Resources	19
Support Agreement	19
Softlink Training Courses (1,2,3)	19

Secondary School Libraries & Higher Education Institutions

Softlink Alice Modules:	Page
Management	14
Circulation	10
Inquiry (incl. Quick Search)	5
Internet Inquiry	18
Periodicals	16
Journal Indexing	16
Acquisitions	18
Subject Authority	18
Multimedia	5
Rapid Retrospective	18
Name Authority	18
Secure Web Browser	18
SDI (Selective Dissemination of Information)	18
Softlink Sandaga	
Softlink Services: Data Conversion – Resources	19
	_
Data Conversion – Loans	19 19
Support Agreement	
Softlink Training Courses (1,2,3,4)	19

Softlink Alice Guided Tour

Getting Started

This guided tour utilises a demonstration version of *Softlink Alice*, and will show you many of the easy-to-use features and integrated capabilities of the program. For your first tour through *Softlink Alice*, we recommend you follow the guide's suggestions using the sample data. This demonstration is a full, working version of *Softlink Alice* limited only by the total number of items and patrons.

Minimum Hardware Requirements for the Demonstration

- Pentium processor or better with 32 MB of RAM
- Windows 95 / 98. Windows NT 4 Workstation or Windows 2000
- CD-ROM drive
- 25 Mb of free disk space

Optional Hardware and Software

To take full advantage of this demonstration, a sound card may be used to listen to sound clips that are catalogued in the sample data. Additionally, a live connection to an Internet Service Provider may be used for the purpose of cataloguing a Web site. These items are not required for the demonstration, but will make additional *Softlink Alice* features available.

After the guided tour, feel free to add actual items and patrons from your library. This will give you an excellent idea of how Softlink Alice will benefit you.

Installation

To install the Softlink Alice demonstration, insert the CD provided.

The CD has an 'auto run' facility, but if your computer does not automatically load the Softlink Installation Wizard please complete the following steps:

- Click Start, then Run.
- Use the Browse... function to browse the CD. Double-click on Setup, then click OK. Select Next.

Once the Softlink Installation Wizard has loaded

- Select **Demonstrations** by moving the mouse pointer to the heading.
- Select Softlink Alice.
- Select English Demonstration.
- From the Welcome to Softlink Alice Demonstration Window select Next.
- Read the Softlink Alice Demonstration License Agreement. To agree with the terms of use and proceed with the installation select Yes.
- Select Next to install the Softlink Alice Demonstration in the default location.
- Select the appropriate language (English by default) and select Next
- Select Next on the Special options screen.
- Select **Next** once you have checked that the options you have chosen are correct.
- Once the installation has completed select Finish.

Softlink Alice will guide you through the automated installation process. Upon the completion of the installation, the Softlink Alice demonstration will automatically start.

Beginning the Guided Tour

Entering Data

Where you read text written like this: Sample Text, type it into the program. Softlink Alice users enter data with bar code readers and do not need to press the <ENTER> key after each scan. This guide assumes you do not have a bar code reader, so you will need to press <ENTER> after you type information.

If you have any questions, please contact us. Contact details are available at: www.softlink.net.au

Entering Softlink Alice



• To log into the *Softlink Alice* demonstration, type DE into the **User ID** field and demo into the **Password** field. These fields are not case-sensitive.



• Click **OK** or press <Enter>.

First Login



A Language needs to be selected the first time you log into the system.

Select your preferred language from the combo box.



• Click **OK** or press <Enter>.

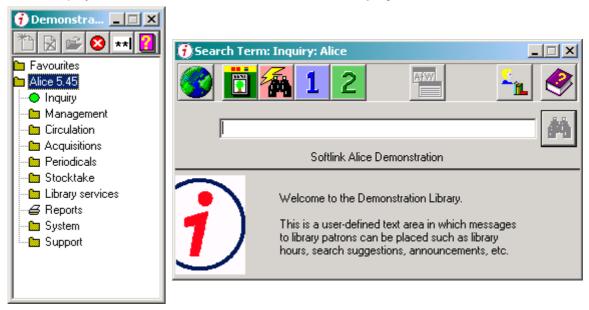
On subsequent logins, you will not need to select a language.

Inquiry / OPAC

Search

This section of the guided tour highlights the use of **Inquiry** as well as the many multimedia features available in *Softlink Alice*.

To start Inquiry, click the *Alice* folder, then double click on **Inquiry**.

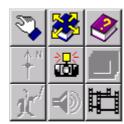




• Type CREATURES in the **Search Term** field, then click **Start** or press <ENTER>. The initial results screen will show the closest alphabetical match to your search term.



- With the keyword Creatures highlighted, click **View** to view the search results list.
- With the title <u>Creatures Great and Small</u> highlighted, click **View** to view the resource details screen.



Multimedia files; including library maps, images, slide shows, Book Wizard, sound clips, and video clips, can be catalogued and viewed in *Softlink Alice*.

When a multimedia file is available for a given resource, its corresponding button will become active.



• Click the **Camera** button to view a bitmap image catalogued with this resource.



Click Back to return to the resource details screen.



Click the Video Clip button to view the video associated with this resource.



Click the Play button to start the video.



When the video is finished, click End to end this search.



- Type in the search term: King <ENTER>
- With the keyword KING highlighted, click View.
- Click on the title Martin Luther King; fighter for freedom, then click View.



Click the Map button to view the library map.



• Click **Back** to return to the resource details screen.



• Click the **Sound** button to listen to King's "I have a dream" speech.



When the sound clip has finished, click End to end this search.



- Type in the search term: New York Magazine<Enter> then click View.
- Click View again to see the resource details screen.

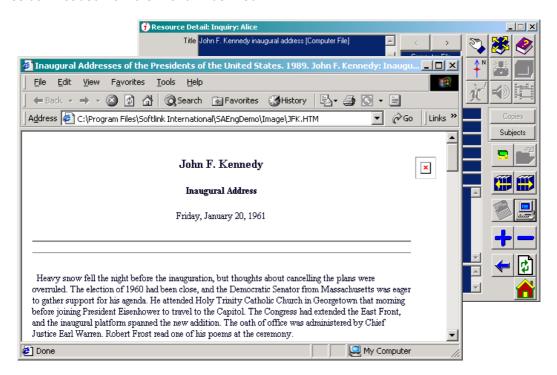


• Click the **Camera** button to view the index page, which has been catalogued with this resource.



Click End to end this search.

Softlink Alice also offers the ability to catalogue electronic files including documents and HTML files downloaded from the World Wide Web.





- Type in the search term: kennedy <ENTER>
- With the keyword KENNEDY highlighted, click View
- The title John F. Kennedy's Inaugural Address is available. Click View to see its details.



 Click the View button to spawn your Web browser and load a HTML file downloaded from the World Wide Web.



When you are finished, close your browser and click **End** to end this search.

Search Criteria

Softlink Alice offers the ability to search on many different fields and restrict your search to a specific field.

- To find an item by author, type their name into the Search Term field.
- Type in the surname: Brandt <ENTER>



- With Brandt, Keith 1930- highlighted, click View to see the results list.
- The library has three resources by this author.



 Click the Restrict to available resources only button and the resources that are on loan will disappear from the list.



Click **View** to see the resource details of the available resource.



- Click End to end the search.
- To find an item by its barcode, type (or scan) the barcode into the Search Term entry. For this example, type: 3077 <ENTER>.



- With the barcode 3077 highlighted, click View to see the results list.
- Click **View** to see the resource details for the title "*Insects*"



• Click the **Map** button to view the library map. Notice that the item is flashing red, indicating that it is currently on loan.



• Click **Back** to return to the resource details screen.

Availability Detail



Click the **Availability** button to see the availability details of the resource. Available to library staff but not patrons are the details of who has borrowed this item.



Click End to end this search.

Quick Searches

Softlink Alice offers three levels of the Quick Searching, to assist those libraries with very young OPAC users. The Quick Search functionality may be turned off if not required.



Click the Quick Search – Category button.



Click the Animals category button



Click the **Dinosaurs** button



Click View to see the resource details of the first title in the list.



Click the Map button to view the library map.



• Click Back to return to the resource details



- Click the Quick Search One term button.
- Type in the search term: cat
- Note that the **Begins with** radio button is active



Click View to see the results list.



- Click Back to return to the enter search term screen.
- Select the **Exactly matches** radio button.



• Click **View** to see the results list. Note that the list has been refined to only those resources which contain the word cat.



• Click **View** to see the resource details of the first title in the list.



- Click the Quick Search Two Term button.
- Type in the search term: cats
- Type in the second search term: dogs



• Click View to see the results list.



• Click View to see the resource details of the first title in the list.



Click the Notes button to see the notes for this resource.



• Click **End** to end the search. Close the window to exit Inquiry

QuickPic

QuickPic offers an alternative method of searching the collection, through the use of graphical representations of subject headings.



Click the QuickPic button.

A list of all QuickPic categories will be displayed.



Click the **Animals** button.

A list of all the **Animals** categories will be displayed.



Click the **Zoo** button.

A list of all the **Zoo** categories will be displayed.



Click the **Bears** button.

A list of all the resources related to the subject **Bears** will be listed.



Click the **Next Page** button.



Click the button for "The polar bear" resource.



Click the **spine label** for this resource, a map will be displayed, showing the shelf location.



Click the Item Details button to show the resource details.



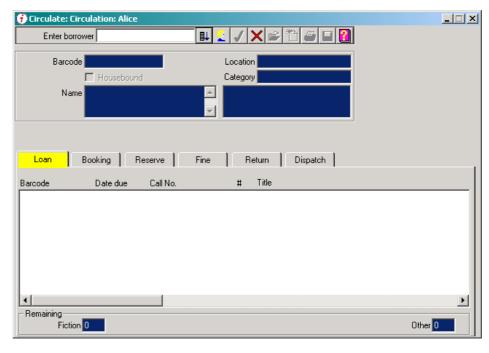
Click the **Home** button to start a new **QuickPic** search.



Click the **Close** button to return to the initial **Inquiry** screen.

To begin circulating resources, click on the **Circulation** folder, then double-click **Loans**.





Lending items

First, lend an item to Camille. She hands you her library card and the book <u>Saturn\the spectacular</u> <u>planet</u>.

- Type (or scan) Camille's bar code: 1003 <ENTER>
- Type (or scan) Saturn\the spectacular planet bar code: 3082 <ENTER>
- This checks out item 3082 to Camille Arnold.

Todd also wishes to borrow a resource. He hands you his library card and the resource.

- Type (or scan) Todd's bar code 1013 <ENTER>
- Type (or scan) the resource bar code: 3064 <ENTER>

Returning Items

To return items, simply click the **Return** tab and begin scanning (or typing) the resource barcodes.

• Type 3077 <ENTER>, 3089 <ENTER>, 3487 <ENTER>, 3019 <ENTER>, and 3046 <ENTER>.

Searching for Patrons

Darla wishes to borrow a resource, but has forgotten her library card.



- Click the **Loan** tab, then click the **Name** button.
- From the lookup list, double-click on Anderson, Darla
- Type (or scan) the resource barcode: 3272 <ENTER>

Finding Loan Information

Mark has forgotten which resources he has checked out. He hands you his library card and asks what items he has on loan.



- Type (or scan) Mark's barcode: 1002 <ENTER>
- Click the **Details** button to see the **Patron Status** screen with a list of items loaned to Mark.



• Click **Finish** when you are done.

Reserving Items

Mark also wishes to reserve an item that is currently on loan.



- Click the Reserve Tab, then click Add.
- Type (or scan) the resource barcode: 3075 <ENTER>

Fines

Todd returns a book and has damaged it.

- Type (or scan) Todd's barcode: 1013 <ENTER>
- Click the Fine tab.



• Click Add, then click in the Fine Description field and type: Damaged Book. Double click on the Debit field and enter a fine amount of 500.



Click Save.

Note: Softlink Alice automatically inserts the decimal, making the fine \$5.00

Paying Fines

Todd now wants to pay his fine.



• Click the **Payment** button. Softlink Alice will automatically set the payment amount to the full balance of Todd's outstanding fines. Click **OK** to receive payment.



Note: Softlink Alice will accept partial payments of fines.



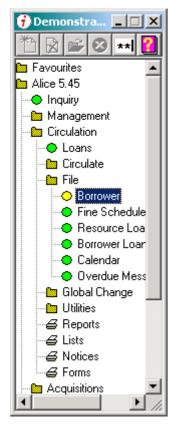
Click Close to close this window

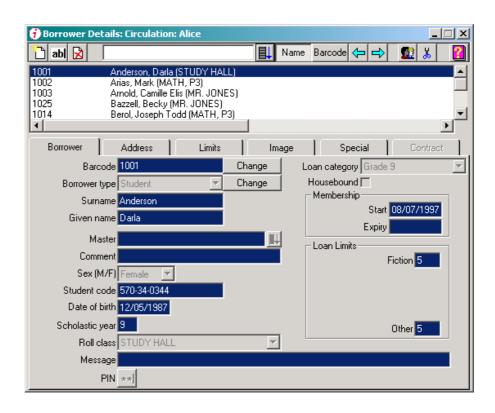
Favourites

You decide that **Loans** is a function you will use frequently. Right-click on **Loans** under the **Circulation** folder, then click **Add to favourites**. This option will now appear in the Favourites folder in addition to its current location.

Borrower

Click the File folder under Circulation, then double-click Borrower.





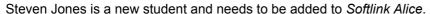
All standard borrower information is stored under the first two tabs. The other tabs hold additional information for each borrower that you may or may not wish to store. For example, the **Special** tab holds 20 user-definable fields. The field names shown in this demonstration are merely examples of what you might choose.

Changing Barcodes

The barcode label on Jesse Mendez's library card has fallen off.

- In the search field above the **Borrower Lookup** window, type in the first couple of letters of his surname: men < ENTER >
- Click the **Change** button next to the **Barcode** field, then type (or scan) a new barcode 1040 <ENTER>

Adding a Student





Click Add, then type (or scan) a new barcode for him: 1041 <ENTER>



- Select the Student Borrower Type and click OK.
- Enter the following basic information:

Surname: Jones Given Name: Steven

Sex: Male (use dropdown list)

Scholastic year: 7

Loan Category: Grade 7 (use dropdown list)

Loan Limits, Fiction: 2 Loan Limits, Other: 1



Click Save to save this new entry.



Click Close when you are finished.

Maintaining Borrower Records

It is the end of the school year, and time to do some maintenance on your borrower records.

- Click the Global Change folder under the Circulation folder.
- Double-click Scholastic Year.



• Click **OK** to graduate all of your students one grade level.

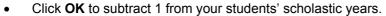


Click Close when you are finished.

Reversing Maintenance

You realise that you had already run this function and now your students are one year ahead of where they should be.

- Double-click Scholastic Year.
- Place a check in the **Decrement** rather than **Increment** check box.





• Click **Close** when you are finished.

Removing Records

The 9th grade students will be moving on to High School, so they need to be removed from your data.

- In the Global Change folder, double-click Delete.
- _/
- For Year to delete, enter: 9.Click OK.

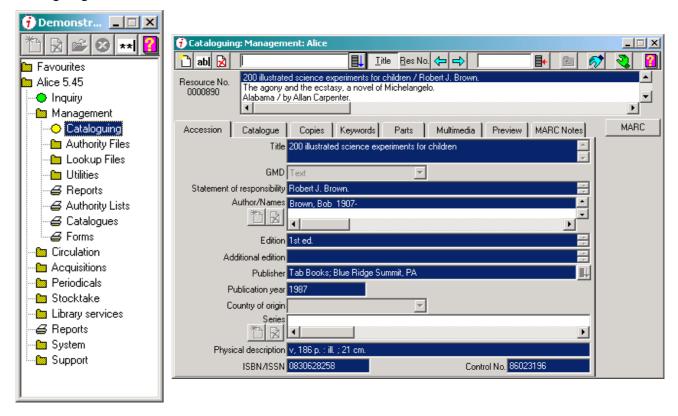


Click Close when you are finished.

Note: Softlink Alice will not delete any student who has outstanding loans.

Management

To begin managing records in your catalogue, click the **Management** folder, then double-click **Cataloguing.**



All standard resource information is stored under the first three tabs. The other tabs hold additional information for each resource that you may or may not wish to store.

Adding Resources



- To add a new resource, Click Add.
- Type: Huck <ENTER>

Note: Softlink Alice will display the closest alphabetical match to ensure that unwanted duplicate titles are not added.



Click New to add this as a new title.



• Complete the title information: Huckleberry Finn then click **OK**.



- To add an author name from the author authority file, click the Author Add button next to the Author/Names field.
- In the search entry, type: Twain <ENTER>

Note: Softlink Alice will display the closest alphabetical match from the author authority file



- Since Mark Twain is already in the author authority file, simply click OK to add Twain
 as the author of this resource.
- Enter any other information as you see fit and click Save when you are finished.
- Click the Copies tab.



Click Add to add the specific copy information for the book <u>Huckleberry Finn</u>.



- Type (or scan) its new barcode: 4001 <ENTER>
- Enter any of the copy specific information as you see fit. When you are finished click Save.

Adding Additional Copies

You realise that you have actually purchased four copies of this resource.



• To easily add more copies, click **Replicate**, set the **Number of Additional Copies** to 3, and click **OK**.



Click Close after the additional copies have been generated.

Creating MARC Records

- If you would like to create a MARC record from the information you have entered, click the **MARC** button, then click **Yes** to generate the MARC record.
- X
- When you are finished viewing the MARC record, click Close.

Changing Barcodes

A barcode has been removed from one of your resources: Words with wrinkled knees.

- Type: Words into the search entry field above the title list, then press <ENTER>
- Next to the Barcode field click Change.
- Type (or scan) the new barcode: 4010 <ENTER>

Cataloguing Web Sites

Softlink Alice also allows you to catalogue Web sites.



- To do so, first click the Accession tab, then click Add.
- Type the title: Softlink <ENTER>



Click New to indicate that this is a new title.



- The Add Resources screen appears, which allows you to add or modify your new title.
 Click OK.
- Using the dropdown menu, change GMD (General Material Designation) to World Wide Web.
- In the Physical description field, type:

http://www.softlink.com.au



Click Save. (In this case you cannot use <ENTER>).

If you have Internet access from this machine leave the cataloguing screen open and start *Softlink Alice* inquiry.



- Search for Softlink, and when viewing the **Resource Details** screen click the **WWW** button.
- Softlink Alice will launch your Web browser and automatically go to the Softlink Web site. When you are finished, close your Internet browser.

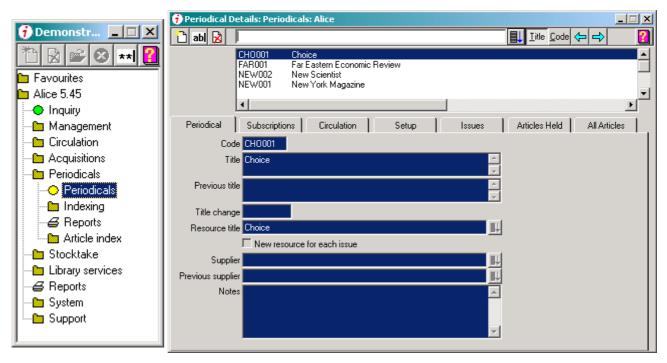


- Click **End** to end your search **Inquiry**.
- Click Close to exit from Inquiry and click Close to end the cataloguing session.

Periodicals

Softlink Alice allows you to track your periodical subscriptions; including renewal dates, costs, and other information. Softlink Alice also allows you to print circulation routing slips, and other reports related to your subscriptions.

• Click the Periodicals folder, then double-click Periodicals.



The functionality of the periodicals screen is identical to the cataloguing screen; therefore, you don't need to learn several methods of accomplishing similar tasks. The tabs on the screen are used as follows:

Periodical - Contains basic information about the magazine.

Subscriptions - Contains detailed information for tracking purposes. Information here is used to generate subscription renewal notices and overdue issues reports.

Circulation - Contains the circulation list for this periodical, which can be printed upon receipt of the magazine.

Setup - Contains the issue description formula which allows *Softlink Alice* to refer to the magazine in the same way its cover does, i.e. date or folio format.

Issues - Displays a list of outstanding and missing issues. As each issue is received, it is removed from this list.

The Indexing and Article Indexing options provide access to cataloguing or loading Journal article information.

X

Click Close to finish.

Softlink Alice Standard Features

In addition to the functions described already, *Softlink Alice* has numerous other utilities to help you in the day-to-day operation of your library. Following the brief descriptions below, please feel free to try any area in the software.

Help

On-line help files using Windows hyper-links allow you to easily find the answers to your questions.

Stocktake

Softlink Alice allows you to stocktake all or part of your collection without having to close your library or stop circulation.

Email

Softlink Alice provides the ability to dispatch reports and notices via email.

Reports

Hundreds of reports are available in *Softlink Alice* including borrower lists, overdue slips, shelf lists, catalogue reports, and a Top 100 list. In addition to the standard reports within Softlink Alice, our Customised Report Service caters for those report requirements which are individual to your library. Reports can be printed, displayed on the screen, saved as text files, or RTF files.

Security

Softlink Alice provides up to 37 levels of user-customized security, allowing you to specify access levels for your library aides or student assistants.

Multi-Tasking

Written to take advantage of 32-bit Windows technology, *Softlink Alice* has the ability to multi-task all of its functions. This means that you can add items and patrons on-the-fly while loaning resources to patrons, print overdue notices while adding new resources and using on-line help, or print reports in the background while working elsewhere in the system.



• When you are finished using Softlink Alice, click Close on the Desktop menu.

Additional Softlink Alice Modules

Internet Inquiry

Make your library collection available on the Internet/Intranet!

Allow your students to search your collection from home using their Web browser. The Softlink Web Site hosts an interactive demonstration of Internet Inquiry – visit www.softlink.net.au to review this module.

Secure Web Browser

Maintain control over student Internet sessions!

The Softlink Alice Secure Web Browser module restricts students from accessing sites other than the catalogued URL site. No ad-hoc browsing is possible with the Alice Browser.

Additional Softlink Alice Modules

SDI (Selective Dissemination of Information)

Create borrower profiles and produce current awareness reports!

Generate reports of newly acquired resources matching those areas of interest listed in a borrower's profile. These can then be emailed/printed for their review. Patrons are able to alter their area of interest via the Softlink Alice Inquiry module.

Subject Authority

Access third party subject headings and See/See Also References.

The Subject Authority module enables the loading of a master Subject Authority file and the See and See Also references for each Subject in use. Only the Subject Headings in use are visible to the library patron. An example third party source is the SCIS Subject Authority database. This database consists of all the subject headings that have been assigned to the resources catalogued on the SCIS database on the Voyager system.

Name Authority

Provides easy access to third party name authority entries.

The Name Authority module enables you to load an established name authority listing. An example source is the SCIS Name Authority database. This data contains all the names of authors, editors, illustrators, narrators, composers, film directors, agencies and organisations which have been selected by SCIS cataloguers as 'main' or 'added' entry headings when describing those involved in the authorship and production of the resource.

Acquisitions

Maintain budgetary control of purchases (both resource and general library expenses) and track your resource purchasing on the "Wish List".

The Acquisitions module caters for future orders, standing orders, subscription renewals, items held on approval and non-book expenses. Orders and requests to suppliers, lists of resources purchased from a budget dissection, claims for late orders, budget reports, Wish List reports and "on approval" reports are all available.

Rapid Retrospective

The quickest and easiest way to catalogue an existing collection!

Used in conjunction with supported bibliographic databases, Rapid Retrospective loads bibliographic data using a resource ID Number (e.g. ISBN). Rapid Retrospective accepts the resources local copy information i.e. shelving details, circulation rules and optionally the locally defined subject headings. Bibliographic databases supported by Rapid Retrospective include SCIS, BNB on CD, National Library of NZ, TES – BookFind CD (BookData), and Brodart Precision 1.

Book Wizard

The multimedia software that encourages reading!

Allow your students to search for resources which suit their reading level, and genre preferences. Book Wizard interfaces with the Softlink Alice Inquiry module (& vice versa). Try the interactive Book Wizard demonstration found in the Demonstrations folder of the Softlink Alice CD!

Softlink Services

Each Softlink office is comprised of a team of IT and Library professionals.

The Directors of Softlink International are conscious of your need for quality assistance and have established the following service areas to ensure your needs are met.

Technical Support

The Technical Support Service provides unlimited access to a team of IT professionals via email, fax or phone. Subscription to this service is on an annual basis and includes free upgrades to the Softlink software purchased by your library. To discuss the support service further, simply contact the Client Services Manager at your local Softlink office.

Data Conversion

The Softlink Data Conversion Team are able to convert resource, borrower, loans and journal data from a multitude of formats. To ensure a high level of conversion accuracy and efficiency, each conversion is completed after consultation with you and our in-house library professionals.

Training

Many training options are available. The most popular training format is the Softlink range of courses on CD-ROM. CD-ROM based training allows for a self-paced, individual learning environment. Softlink Training courses on CD-ROM currently cover: an introduction to Alice; Circulation; System Administration; and Advanced Cataloguing. Onsite consultation and telephone training are also available and delivered by our library qualified training professionals. Additional details of the training options for your library are available from the training department of your local Softlink office.

Epilogue

Softlink Alice is a user friendly, yet comprehensive integrated library management system. Although this guided tour is an excellent introduction to Softlink Alice, we strongly encourage you to play with all the functions on the menu. As you investigate the ways in which Softlink Alice can solve your library needs, please feel free to contact us for information and advice, including details of the Softlink Alice hardware requirements.

If you would like to contact your local Softlink office please check our Web site (www.softlink.net.au) for a full listing of our offices worldwide.

Alternatively, contact the Softlink International head office to have your request forwarded to your local office:

Email: info@softlink.net.au

Address: 68 Commercial Drive Shailer Park QLD 4128

Australia

Ph: +61 7 3801 4111

Fax: +61 7 3801 4555

Uninstalling the Demonstration

To uninstall the *Softlink Alice* demonstration, simply use the **Windows Control Panel**, **Add/Remove Programs** feature to remove the *Softlink Alice* Demonstration.