

# **How to start Data Entry of Monographs and Books in e-Granthalaya 3.0**

**User Manual for ‘Retro-Conversion’**  
(A Direct Method to enter Cataloging records of Books and Monographs)

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# Chapter 1

## General Considerations

### 1. System Setup

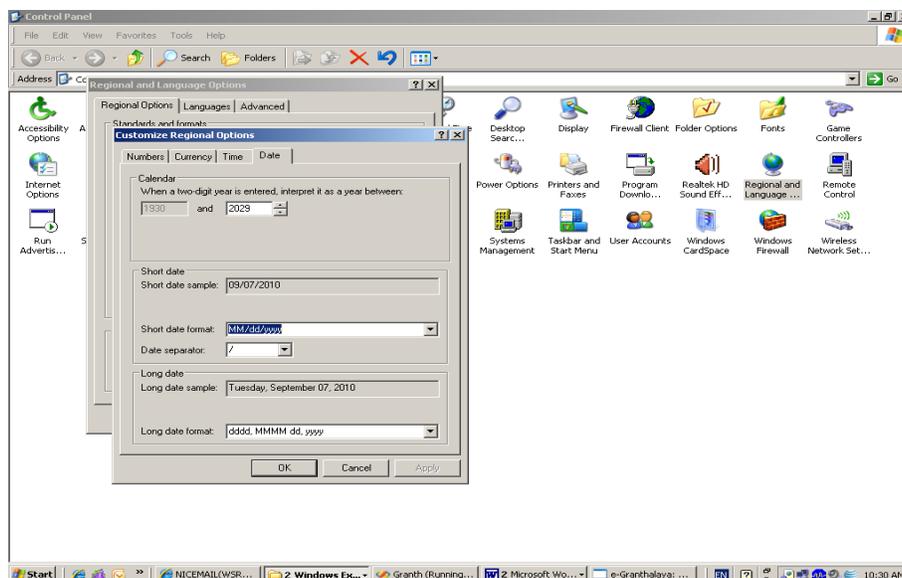
#### 1.1 Date Setup

*Short Date Format* of the System (Server PC as well as Client PCs) must be set to US Format i.e “**MM/dd/yyyy**” while date separator must be set to “/” only. However, you will enter the date during data entry in e-Granthalaya Client Program in “dd/MM/yyyy” style , e.g. 27/02/2010

#### How to setup date format

1. Go to **START >> Settings >> Control Panel**
2. in Windows Server XP/Vista/2003/2008: Under “**Control Panel**” >> double click the Regional Options >> Press **Advance/Customize** button >> Select DATE Tab
3. Under the **DATE** Tab >> in “**Short Date Format**” type the format i.e. “**MM/dd/yyyy**” and save it (MM must be in caps)
4. This is done once, however, users are suggested to check it regularly because some times it automatically gets changed to Indian format i.e “dd/MM/yyyy”

**NOTE:** In case any date format related error is thrown by the e-Granthalaya then check this date format and correct it as above



## 1.2. Date format in the Forms (for Data Entry)

While entering the data in the software the format of the **DATE** should be in Indian Format i.e “**dd/MM/yyyy**” e.g. 25/11/2005. Year should always be in the 4 digit

## 2. Meaning of Action Buttons

<b>ADD NEW</b>	=	To add new record
<b>EDIT</b>	=	To edit/change the existing Record
<b>DELETE</b>	=	To delete the existing record
<b>SAVE</b>	=	To Save the new record
<b>UPDATE</b>	=	To save the changes after edit/change
<b>CANCEL</b>	=	To cancel the current event
<b>OK</b>	=	To go for further option
<b>EXIT</b>	=	To exit from the form
<b>SEARCH</b>	=	To search the existing record
<b>PRINT</b>	=	To generate the Report

**NOTE: Use TAB button on the keyboard to go to the next available field or use the Mouse to jump to next field/text boxes**

## 3. Type of Fields

<b>Mandatory Fields</b>	: Shown in the Red Color, values are mandatory
<b>Optional Fields</b>	: Users can leave such fields blank if no data available
<b>ID</b>	: ID filed is system generating, no value will be assigned while adding new or editing the existing record. However, this field can be used to retrieve the existing records
<b>CODE</b>	: This field is mandatory, requires alpha-numeric value, must be unique
<b>CAT NO</b>	: This value is numeric in nature and generated automatically on saving a new catalog record in the system – it is a Record Number and not linked with Accession Number

4. The fields which are not enabled / write protected, users are advised not to try to add any value in such fields.

## 5. Automatic Filled Fields

In the following fields, values are “Automatically” filled while saving the records on New addition or on Editing.

USER CODE:	The USER CODE who is logon to the software
DATE ADDED:	Current Date of the System
DATE MODIFIED:	Current Date of the System
ID:	System Generated Value
Catalog Level:	<ol style="list-style-type: none"><li>1. Initial – When a new Catalog Record is added</li><li>2. Partial – When first Acquisition Record is created to purchase the copy of a book</li><li>3. Full – When at least one copy of the book available in the database/collection</li></ol>
Acquisition Level:	<ol style="list-style-type: none"><li>1. Requested – on Request</li><li>2. Approved / Rejected</li><li>4. Ordered</li><li>5. Received / Partially Received</li><li>6. Billed</li><li>7. Paid</li><li>8. Direct Accessioned – When data entry is done using Retro-Conversion Module (Direct)</li></ol>

## 6. Enabled or Disabled Fields / buttons

While working with this software, you will find that many of the text fields and buttons are enabled or disabled. Enabled controls can be used while disabled controls are locked. This process of enabling and / or disabling is pre-decided, therefore, user should not worry about the controls.

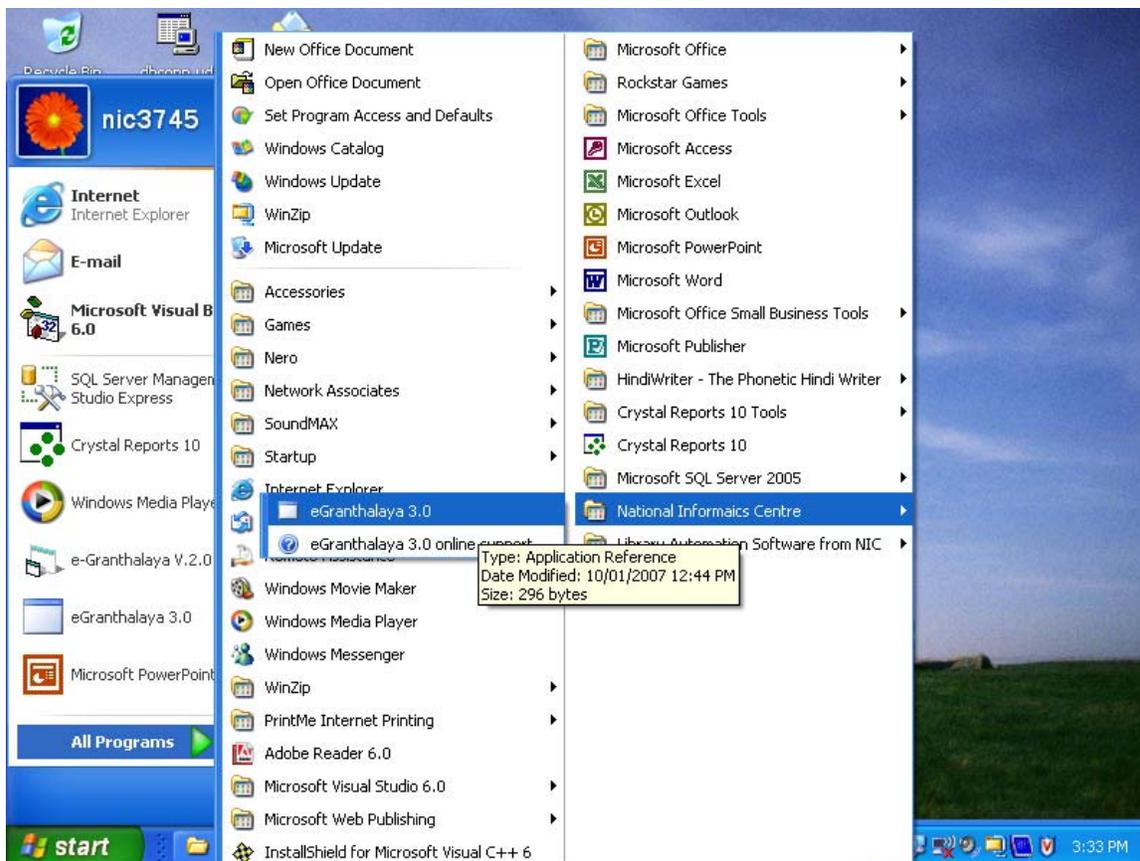
## 7. Screen Resolution

**The Software is best viewed in the 800x600 screen resolution**

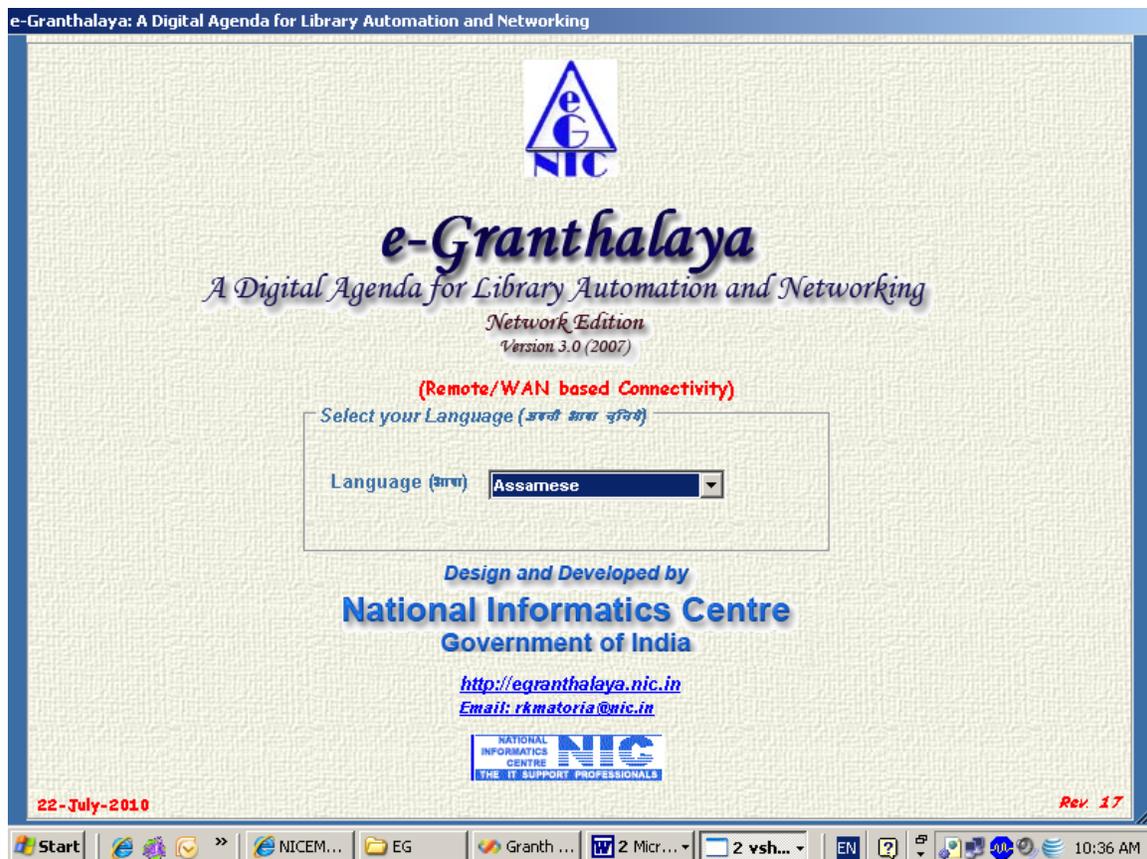
## Chapter 2

### How to Start the Program

2.1. After successful installation of the **e-Granthalaya** software, user can run the program by choosing the program shortcut available under the “**Programs**”, as given below:



2.2. Once you click the “**e-Granthalaya 3.0**” shortcut, the program gets started and first screen appears as given below:



2.3. From the drop-down menu (tiny arrow) in the above screen, select the **Language** in which you want to display the labels on the form

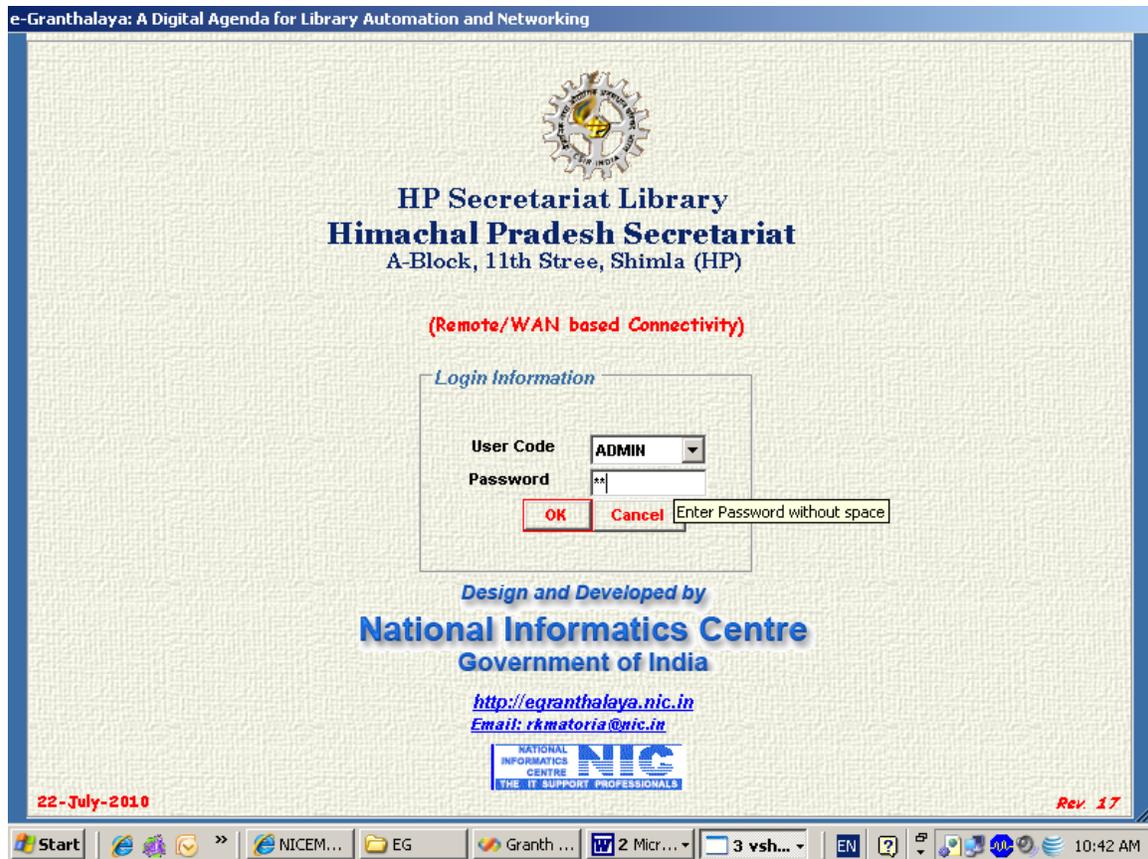
**NOTE:** To display the labels in the local language like Hindi, you must install the “Language Pack” in your PC.



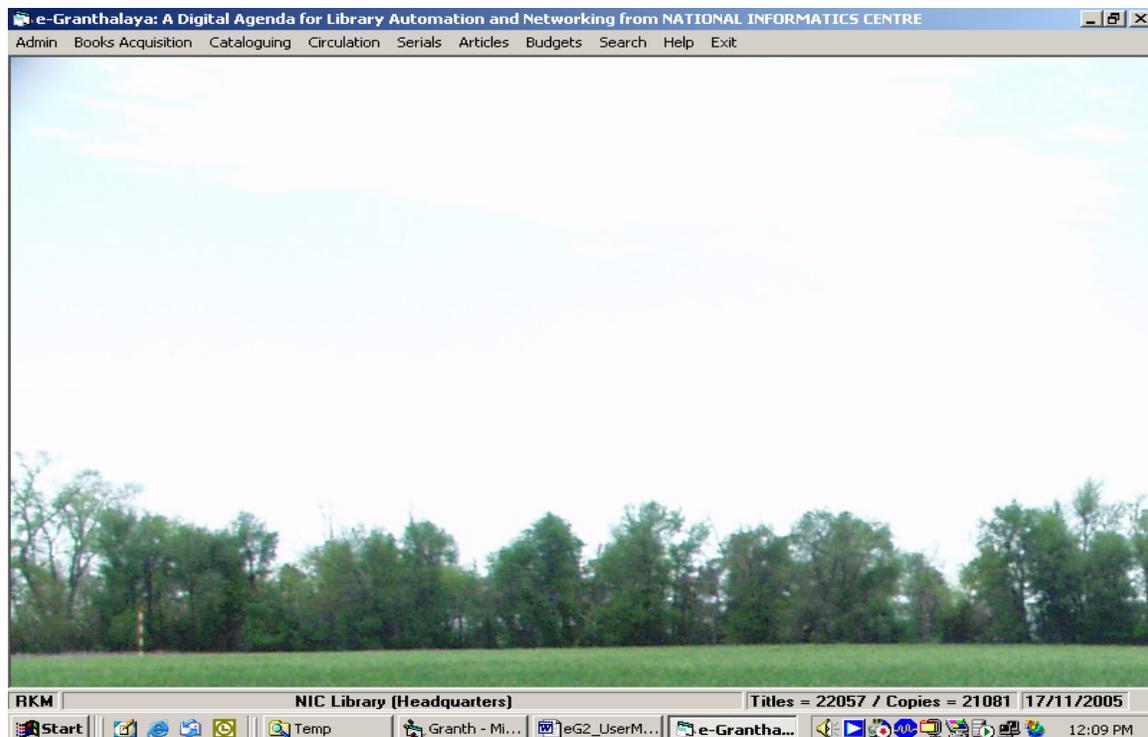
2.4. From the drop-down (tiny arrow) in the above screen, select the **name of the library** by clicking it, next screen will appear.

NOTE: In case it is a new database and you are first time connecting the e-Granthalaya then “**Add New Library**” button will appear. By pressing this button, you will add one Library Record by pressing the Add New Button on the following screen

2.5. From the Drop-Down, select the User Code and enter Password to access the Program Modules and Menu. In case it is a new database and you are first time connecting the e-Granthalaya then “**Add New User**” button will appear. By pressing this button, you will add First User Record and will SAVE it..then EXIT the Form



2.6. Select the **user code** from the drop-down and type the **Password** and press OK button or **press ENTER** key on the keyboard....Then you will receive the message “Welcome to e-Granthalaya” and all modules will become available to the users for data entry, as shown in the below screen:



There are the following modules in this software:-

- |                |  |
|----------------|--|
| 1. Admin       | For making users, entering the default values, etc |
| 2. Acquisition | For purchasing the new books in the library        |
| 3. Cataloging  | For generating the full catalog entry of the books |
| 4. Circulation | For Issue and return of the documents              |
| 5. Serials     | For subscription of the Journals and Magazines     |
| 6. Micro Docs  | For articles indexing                              |
| 7. Budget      | For budget controls and bill processing            |
| 8. Search      | For searching the OPAC                             |

NOTE: System administrator / library in-Charge can set the module wise permission for each and every users using the USER menu under Admin > System data >>Add Users

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## Chapter 3 Admin Module

“Admin” module is used for making users, setting their permissions, making entry of the default values in the master tables and then using such values in the subsequent modules. This module contains the following menu and sub menu:-

**1. Add Users (Table: USERS)** - This form is used to add the Users who will operate the Software. While Adding the New User you may set the permission of the module to be accessed by the user. To add new user press ADD NEW and enter the details then save the record by pressing the SAVE button. You can modify any user any time just by selecting a user record and by pressing the EDIT button. After modification, you need to save the changes by pressing the UPDATE Button. For change of password, press CHANGE PASSWORD button and Update if. Password must be 10 to 15 Character, alpha-numeric, case-sensitive and with special characters. In case you forgot your password the you can see it from the USERS Table of the Database.

**2. Bibliographic Level (Table: BIB\_LEVELS)** – This Form is used to add / edit / delete Bibliographic Levels (A first Level Categorization of Reading materials in a library). However, users are advised not to add / delete any existing record from this table. In case you want to add more documents Types then add in DOCUMENTS TYPES form. As per international standard there are two bibliographic levels for printed materials in the libraries: *M= Monographs* and books and *S= Serials*

**3. Materials Type (Table: MATERIALS)** – This form is used to Add/Edit/Delete Materials Types (A Second Level Categorization of Reading materials in a library). Users are advised not to Delete / Modify any existing record. The Materials Types already available have been added to represent the documents in a library as per international standard.

**4. Document Types (Table: DOC\_TYPES)** – This Form is used to Add / Edit / Delete Document Type in a library – a third level of categorization in the library. Here Users can add new documents types (if not exists) by pressing ADD NEW button. Existing Records must not be deleted / edited.

**5. Acquisition Modes (Table: ACQMODES)** – This form is used to Add / Edit / Delete Acquisition Modes in a Library. Do not delete/modify the following records available in the software:

E	=	Exchange
G	=	Gratis / Gift
P	=	Purchased (for books)
S	=	Subscribed (for periodicals)

**6. Currency Codes (Table: CURRENCIES)** – This form is used to manage the Currency Codes which will be used in Books Acquisition and Budget Modules to process the Bills. New Currency Codes must be added as per the **ISO: 4217** available in the CD of the e-Granthalaya Software / or can be download from Internet.

**7. Copy Status (Table: BOOKSTATUS)** – This form is used to Add / Edit / Delete Type of Copy Status in a Library. There is no International standard to represent the copy status so users can add their own status. However, possible status are already added in the database. Users are advised not to delete/modify the existing status.

**8. Frequencies (Table: FREQUENCIES)** – This form is used to Add/Edit/Delete the journals frequencies which are used in the SERIALS module of the software. There is no international standard to represent the frequencies so users can add with their codes, etc. However, we have already added the frequencies and users are advised not to modify and delete the existing records.

**9. Language Codes (Table: LANGUAGES)** – This Form is used to Add/Edit/Delete the International Language Codes as per ISO: 639 with 3 digits codes. Users can add codes for more languages as per ISO: 639 – available in the CD / Internet. The language codes are used during cataloging to select the language of the documents.

**10. Accompanying Materials (Table: ACC\_MATERIALS)** – This Form is used to manage the Accompanying Materials sometimes used to come with the books like CD, etc. There is no international Standard to represent the codes of such materials so users can add their own codes, however, users are advised not to modify and delete the existing records.

**11. Message and Text (Table: MESSAGES)** - This form is used to add text messages to be printed in the letters / communications and reports of various kinds. These text messages are printed in the green sheets / letter /orders issued from the library e.g. Approval List, Orders, Reminders, etc. All Fields are Mandatory.

**12. Sections (Table: SECTIONS)** - This form is used to add the various kinds of sections in the library such as Children section, Text Books section, General Section, Special Section, if any. It is recommended to have at least one section i.e. General

**13. Committee (Table: COMMITTEES)** - This form is used to add at least one **Library Committee** using the action buttons available. Users are advised to add at least one committee. This committee will be used in BOOKS ACQUISITION and SERIALS modules to get approval from the corresponding committees. For Retro-Conversion, the committees are not used.

**14. Countries (Table: COUNTRIES)** - This form is used to add the **Names of the Countries** to be used for the books published. More country codes can be added as per the ISO: 3166 with 3 –digits country codes. The ISO: 3166 is available in the CD / Internet.

**15. Library Details (Table: LIBRARIES)** - This form is used to store the details of the Library which is using the software. You may add one account for each participating libraries as a cluster of libraries. The software supports database management for multi-libraries. The data enter here are printed in all the reports, introduction page of the web OPAC, etc The Library CODE must be unique and can not be changed later. The CODE will be printed on barcode labels also.

**16. Publisher Directory (Table : PUBLISHERS)** - This form is used to generate Published Directory by adding the details of the Publisher once as authority file. Then these records will be used in the subsequent modules while adding the details of the books and journals. Publisher Name, Place and Country are the mandatory fields, these are automatically displayed on selection of the publisher during cataloging of the books.

**17. Type of Binding (Table: BINDINGS)** - This form is used to add Type of Binding. Already we have included many types of Binding found common in the library. There is no international standard to represent the binding by a code, so users can add their own codes. However, users are advised not to delete/edit the existing records.

**18. Vendor Directory (Table: VENDORS)** - This form is used to add VENDOR details using the fields given in the form. Later, these details will be used while purchasing the books and subscribing the journals, etc. Vendors records are used during placing of the ORDER in BOOKS ACQUISITION and SERIALS modules.

**19. Subject Directory (Table: SUBJECTS)** - This form is used to add SUBJECT HEADINGS details using the fields given in the form. Later, these Subjects will be used while doing cataloging of the books, etc. Later, Users will be able to search the catalog subject –wise.

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## Chapter 4 Cataloguing Module

This module is used to add/edit catalog records of books and monographs. The additional data elements constitute the foundation of the Cataloging Code being used by the library. Besides, in this module many other utilities have been provided to update / refine / complete the three main type of records :-

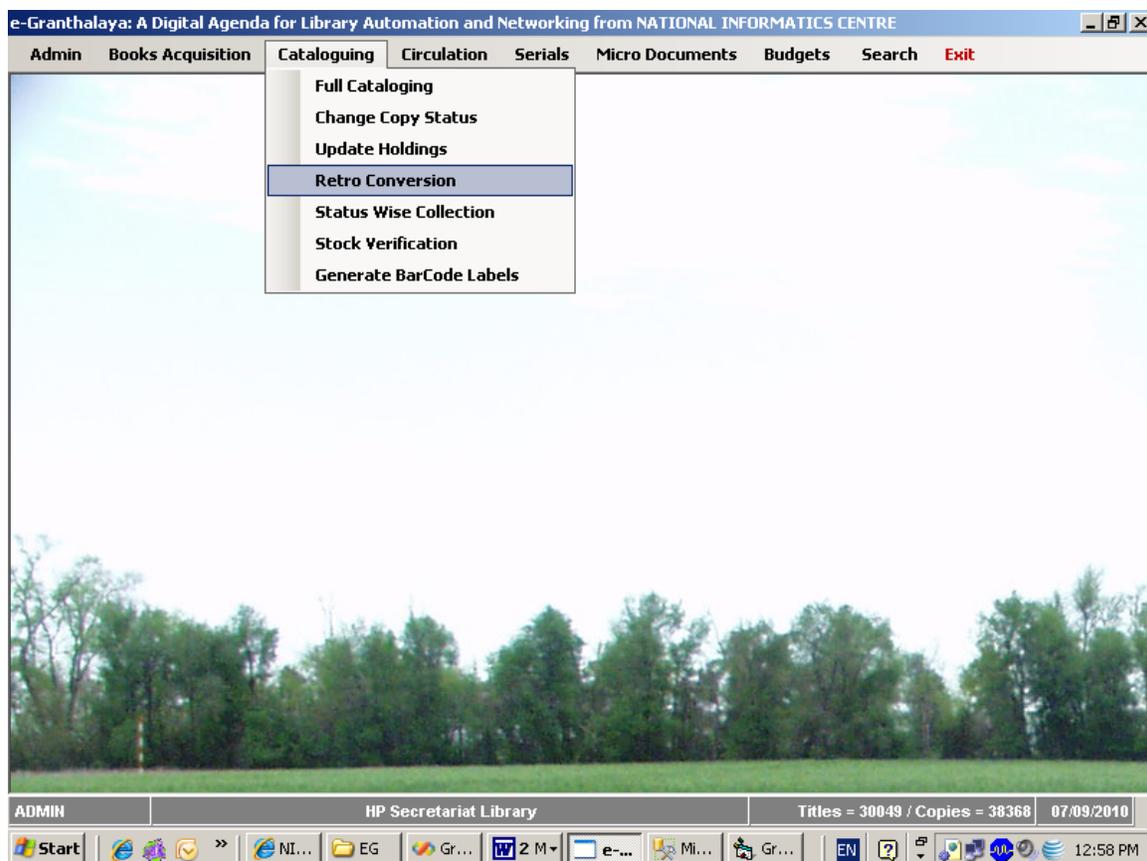
**Cataloging Record – Contains details of the documents**

**Acquisition Record – Contains purchasing details**

**Holding Record – Records of the Accession Number / Copy / Holdings**

This module consists of the following menu:-

1. Full Catalog - Used to add additional data elements in the catalog records
2. Change Copy Status - Used to change the status of the Copy of a title
3. Update Holding - Used to update/modify the Holding Records
4. **Retro Conversion - Used to enter the catalog data (Direct) for Books, etc**
5. Status Wise Collection- Used to view the status wise collection of the library
4. Stock verification
5. BarCode Generation Utilitiy



## 1. RETRO CONVERION

This form is used to add catalog records direct for the **existing Collection of books and monographs**. This utility is very useful to save the time of the library staff where they can add the library data direct avoiding the various steps required in the ACQUISITION module.

This form has been divided in the following three parts:-

1. **Catalog Record** – Create Catalog Record of the book - **Mandatory**
2. **Acquisition Record** – Create purchasing record of the Book – **Optional**
3. **Holding Record** – Create Copy/Holding/Accession Number Record of every copy of the book - **Mandatory**

**NOTE:** All the three parts of the forms are arranged on the same one below another, these can be scrolled down / up by using the **Vertical Scroll Bar** given in the right side of the form.

The screenshot displays the 'e-Granthalaya: A Digital Agenda for Library Automation and Networking from NATIONAL INFORMATICS CENTRE - [Retro Conversion]' window. The interface is divided into several sections: 'Search' at the top, 'Title Details' for bibliographic information, and 'Acquisition Info' for purchase details. A red speech bubble highlights the 'Add New' button in the 'Action' column, with the text 'Press arrow button to move up/down'.

**NOTE:** As we have mentioned that there are three records to be created to complete the data entry of any title in this software. These three type of records are created in the following manner:-

- Catalog Record** – Parent Record with full bibliographic details of the title
- Acquisition Record** – Child/ren record(s) (relationship with Catalog Record) which contains details of the purchasing process of that title in the library
- Holding Record** - child/ren record(s) contains the copy information of the title

#### 4.1. How To CATALOG Record

##### Add New Catalog Record

To add new title (Catalog Record), follow the steps are required:-

1. Click the “Retro Conversion” menu from the CATALOGING module
2. Press ADD NEW button given in the Catalog Info Part (Top most part of the form)
3. Add the contents / data elements in the corresponding fields

4. Select the value from drop down wherever available
5. In case of Author and Publisher value is not available in the drop down, add new record by pressing the corresponding button (PUBLISHER and AUTHOR) given against these fields, on adding new record, EXIT these (Author / publisher / subject) form
6. Fields in Red color are mandatory
7. Use semicolon in case more than one value is typed in one field e.g. KEYWORD field
8. Select the appropriate Bibliographic level, materials type, documents type from the drop down
9. Type ISBN data only and not the word (ISBN) as printed on the book
10. Browse the image to be added with the record by pressing the BROWSE button
11. press SAVE button to save the Catalog Record
12. On SAVING the Catalog Record it will generate a CAT NO (a record No) and will display the message “Do u want to add copy/holding record” – Press YES to create a copy record in the bottom part of the Retro-Conversion Form

### **Add New Copy/Holding Record**

One holding/copy record will be added for every copy of a Title. To add the Holding record for a given title, follow the steps given below:

1. Press ADD NEW button to activate the fields to be added in the Holding Part
2. Add data in the corresponding fields
3. Select the corresponding ACQ ID from the drop down to link the Holding Record with Acquisition Record, if any. In case, no purchase information has been added, leave the ACQ ID field blank.
4. Press SAVE button the save the record
5. On saving the Holding Record, a unique Hold ID is created automatically
6. In this way you can add as many holding record as there are copies of the title, one by one by pressing ADD new button again

## **2. CHANGE COPY STATUS**

This form is used to change the STATUS of the copy of a title. There are various status of the copies in a library such as Available, Issued, Damaged, Lost, Withdrawn, etc. These status are first added in the master table of the STATUS in the database using “Status of the Books” menu under the SYSTEM DATA in ADMIN module. The details has been given in the manual under the ADMIN module.

To change / update the STATUS, following steps are required:-

1. Select the “Change Status” menu from the CATALOGING module

2. The form has two parts i.e. Upper part at the top which displays the Catalog Record and the bottom part displays the Holding Record
3. Display the Catalog Record / Holding record either by typing the CAT NUMBER in the field and press TAB or ENTER. In case, no catalog number is known, type the Accession Number in the field under Holding Record portion and press Enter
4. Select the desired Status from the drop down menu of the STATUS fields on the form
5. Press UPDATE button to save the changes

**NOTE:** In this form, only STATUS of the book copy can be changed and not other fields. For taking the print of all the copies with a particular status, please use the next menu i.e. Status Wise Collection

In case, you need to add more status type in the master table, please used ADMIN module. This form can also be used for “Stock Verification” by adding the unique status in the master table.

### 3. STATUS WISE COLLECTION

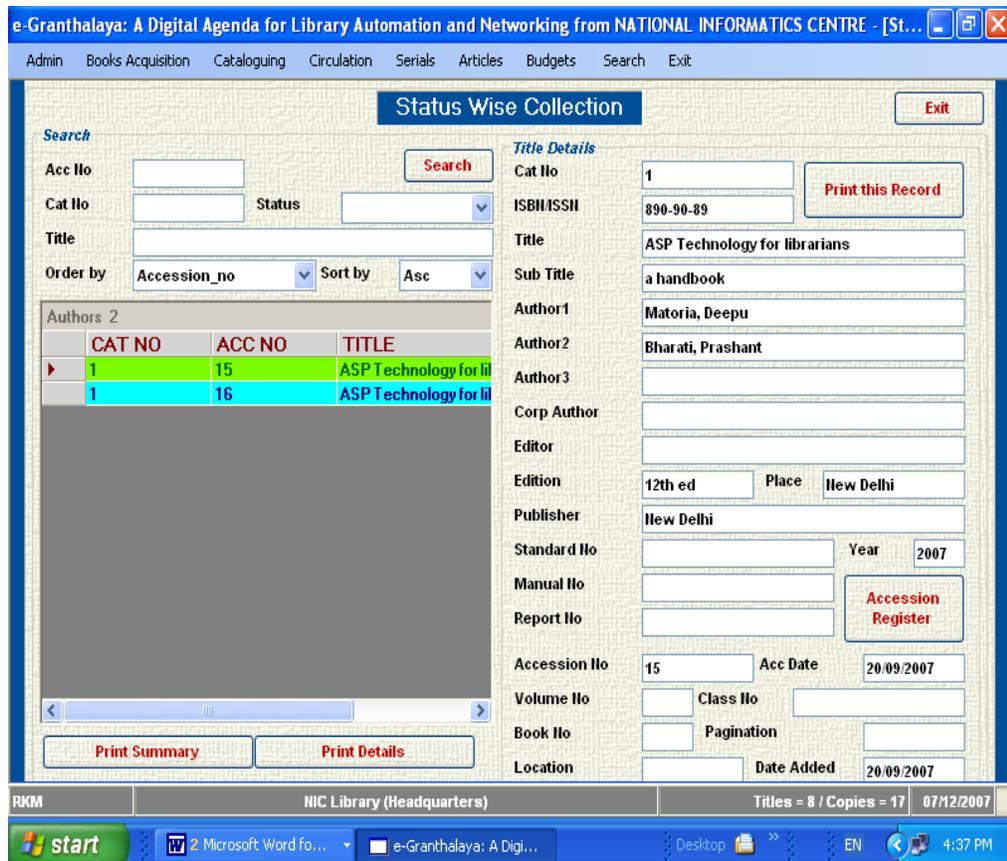
This form can be used to view or generate the report of the collection in a library depending on the STATUS of the copies such as Issued, Lost, damaged, etc. On this form no updation is required. To search the library collection status wise, follow the steps:-

### **Search the Collection**

1. Select the menu “Status Wise Collection” from the CATALOGING module
2. Select the desired “Status” from the drop down menu given under Status heading
3. To view complete list, press the SEARCH button
4. List of titles with the selected Status will be displayed in the
5. The records can also be searched on the basis of specific Title, Cat Number, Accession Number
6. Select the Order by / Sort by option to display the results in the desired fashion

### **View the Details**

7. Click the desired result item (title) from the Data Grid to view the details of the Record in the right side fields
8. Take PRINT in various modes by pressing the corresponding PRINT button



## Chapter 5

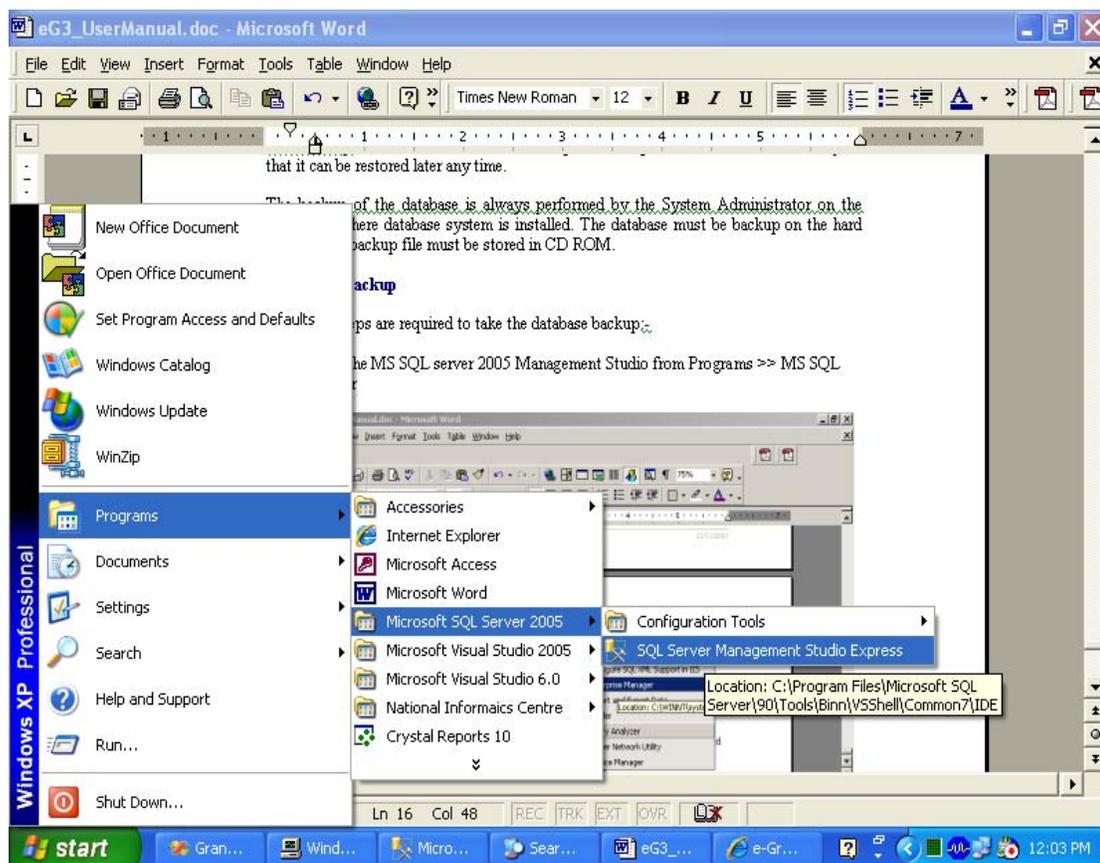
# How to Take Backup

As e-Gratnalaya™ uses MS SQL Server 2005 database management system to store the data of the library. Therefore, it is essential to keep the backup of the database of the library so that it can be restored later any time.

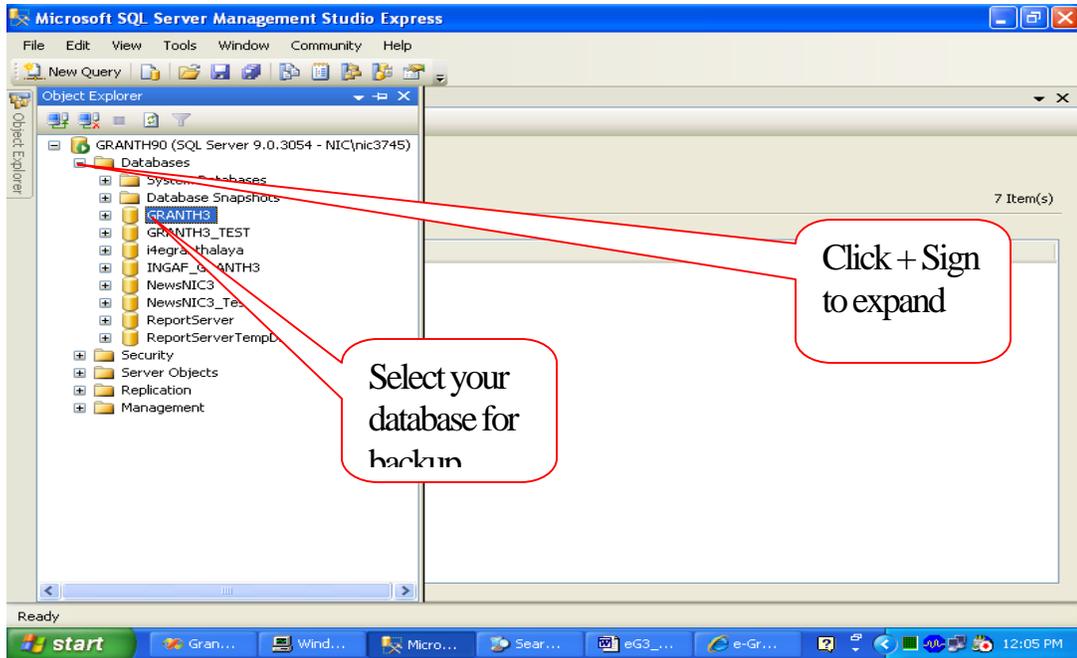
### 1. Backup from SQL Server 2005

Following steps are required to take the database backup:-

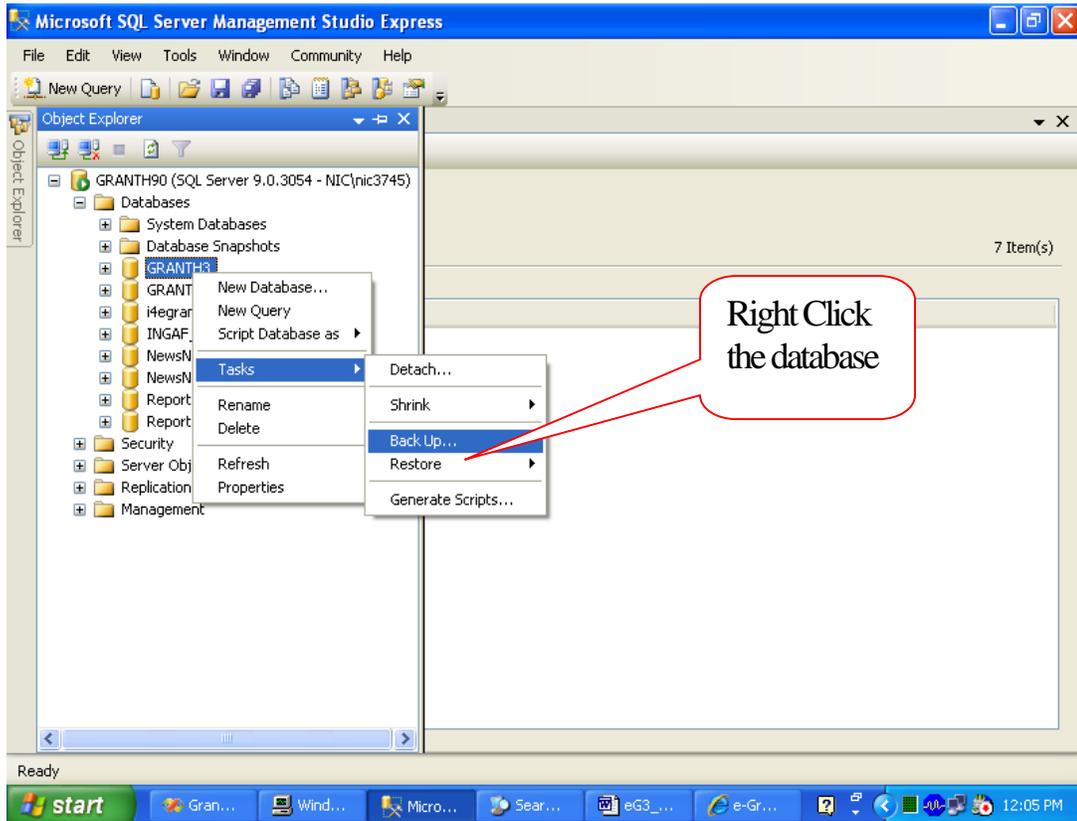
1. Run the MS SQL server 2005 Management Studio from Programs >> MS SQL Server 2005



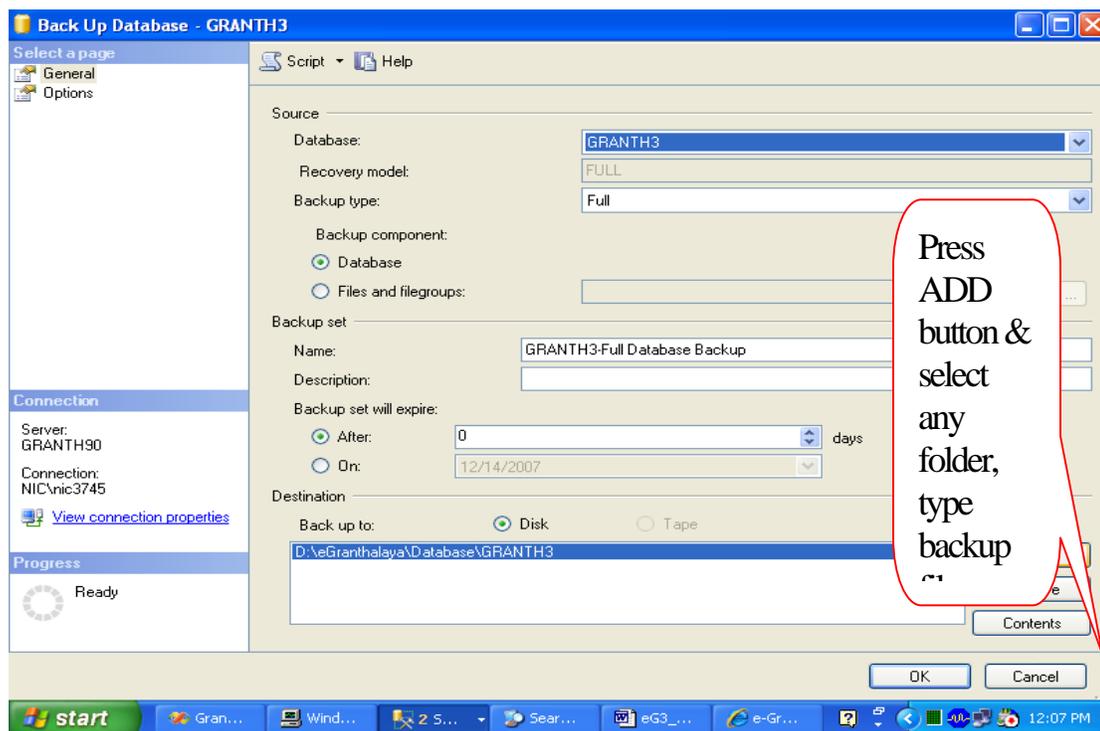
2. After Connecting your Server, expand the Database interface up to your database by just clicking the + sign



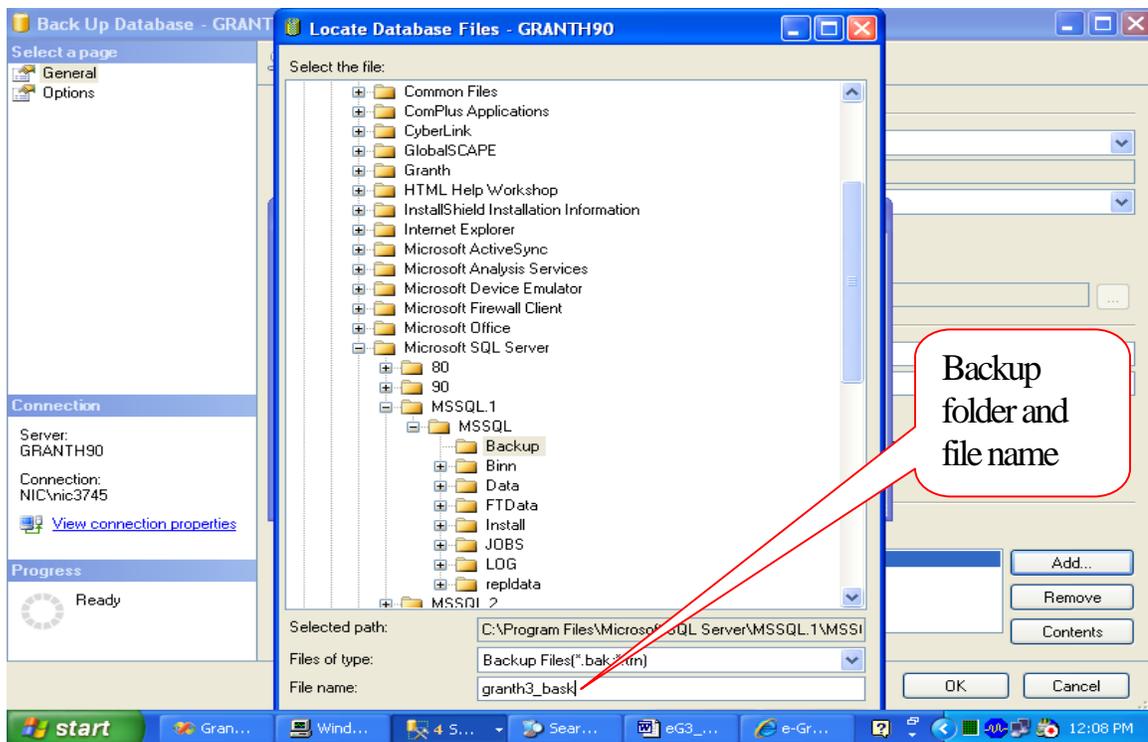
3. Right Click your database and select the Task >> Backup database menu



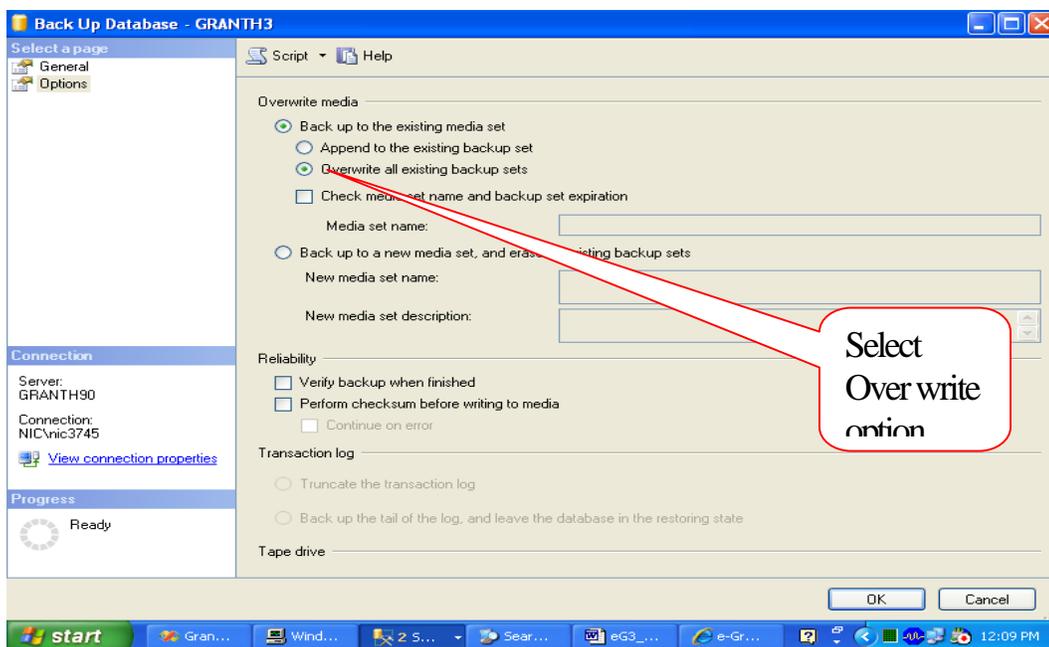
4. Press the **ADD** button to add the backup file name and its location/path



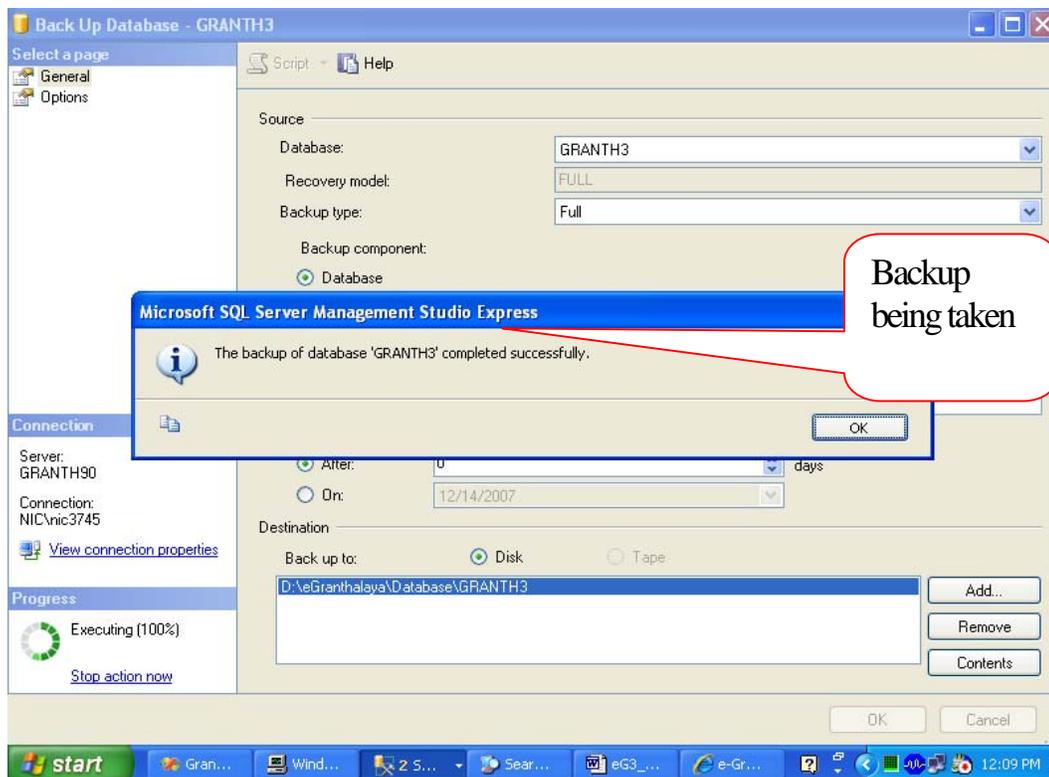
5. Browse the folder where you want to store the backup file and type the name of the backup file (anything)



6. Select *Over Write* option from the screen



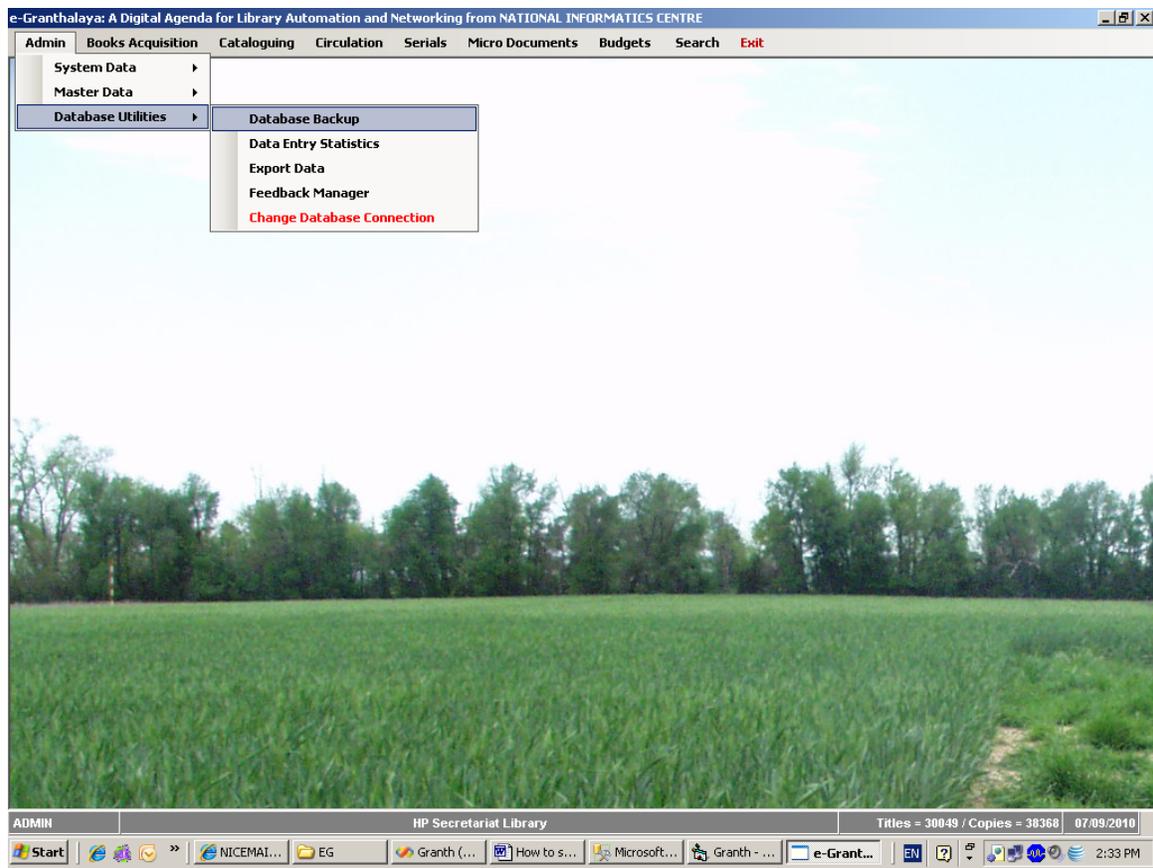
7. Press OK button to perform the backup



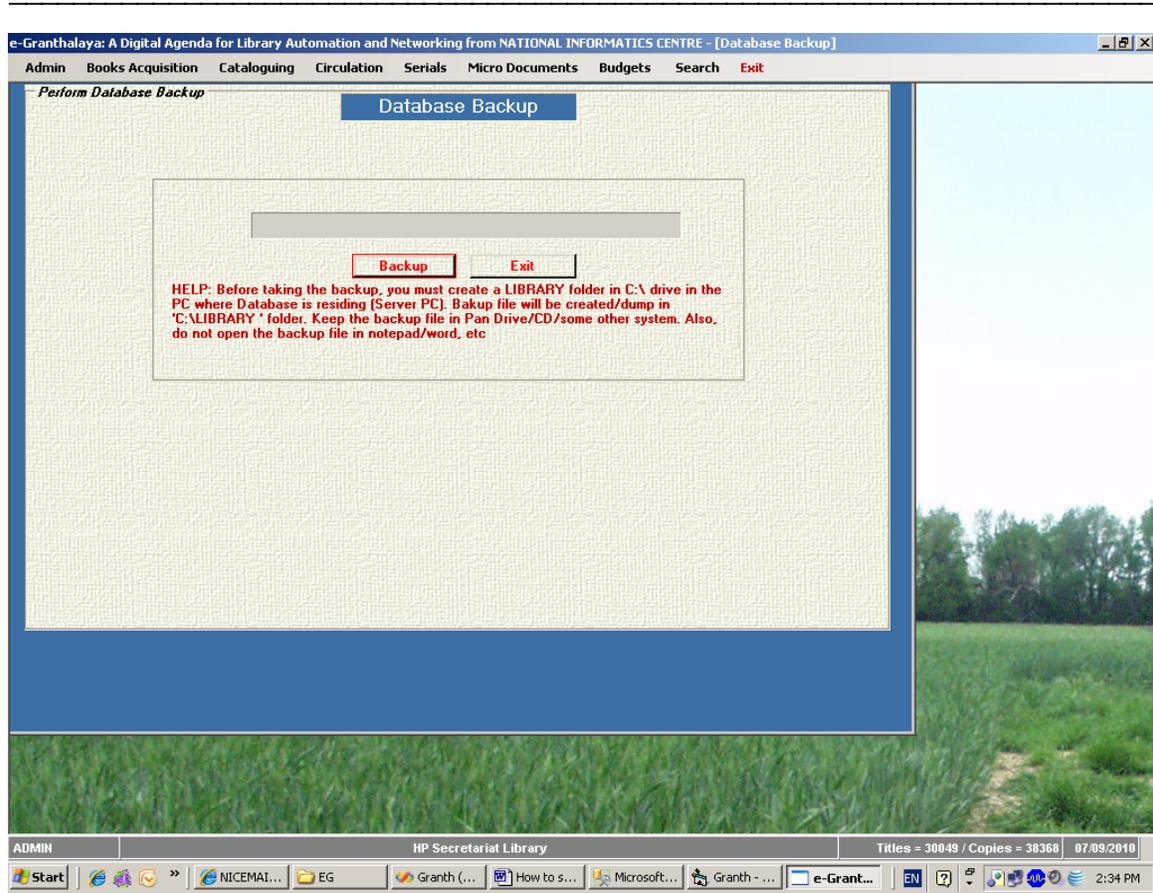
8. Press OK to finish the backup

### **b. Backup from e-Granthalaya**

**Step 1: Run the ADMIN >> Database Utilities >> Database Backup form**



**Step 2: Press BACKUP button to take the backup**



**NOTE: Before performing the backup, make sure that you have created a LIBRARY folder in the C:\ Drive in the PC where your database is residing. Keep backup file in pan drive for later use.**

