



User Guide

IDEALib

Introduction

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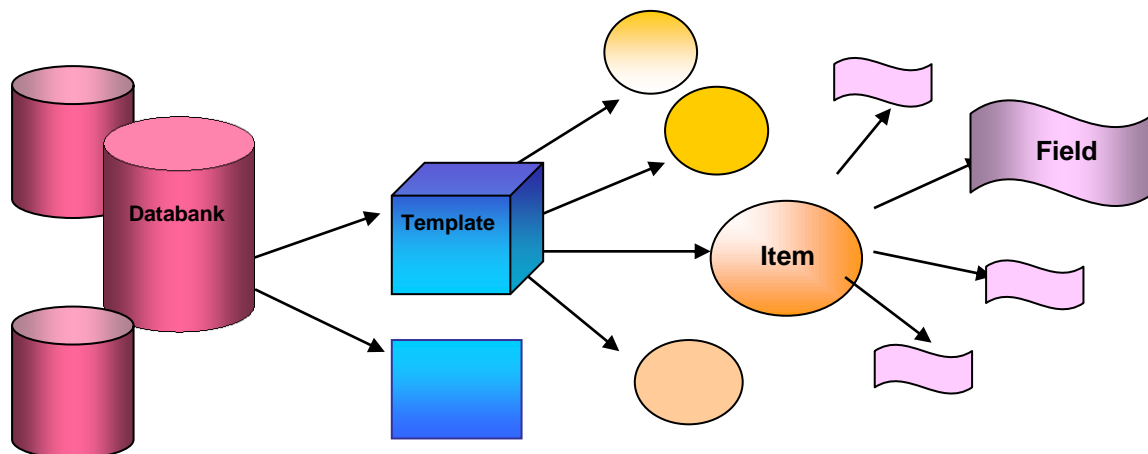
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This chapter provides an overview of the IDEA@ALM software, and is intended for new users. The first section introduces the elements of the IDEA@ALM catalog: databanks, items, templates and input fields. The second section presents instructions on entering and exiting the system. The next section presents the main menu, and the toolbars. The **Working with IDEA@ALM** section explains how to work with lists, notebooks, tables and the calendar. Instructions are given for additional system skills, such as using the right mouse button and resizing screens. The next sections deal with using the basket, importing and exporting, and scheduling. The final section presents basic instructions for performing daily backup and backup definitions.

IDEA@ALM Data Structure

The IDEA@ALM database is comprised of databanks that are defined by the staff user. The databanks are comprised of items. Each item is comprised of fields. Since different types of items have different fields, templates are used to define the fields used for each type of item.



Databanks

The IDEA@ALM database is comprised of databanks that are defined by the staff user. Each databank can have unique definitions. A set of specific authorizations can be defined for each databank, as well as specific screens and search fields, thus tailoring the format of the system to the types of materials and users. Searches can be performed on a single databank, on several chosen databanks, or on all of the databanks.

Items

Each databank is comprised of specific items. The items can be either physical or virtual objects. Items are defined and cataloged according to templates. Cataloging an item creates the item's notebook. The notebook includes all the fields that were defined in the template.

An item can be created under only one main databank. However, it can be connected to additional databanks for search and authorization purposes.

Physical items can have different copies. Different copies of an item might have different information.

Items can be attached to other items, and the user can navigate between attached items in any direction.

Digital objects such as movies, images, audio, and documents can be linked to the item, as well as Internet sites and other external links.

Templates

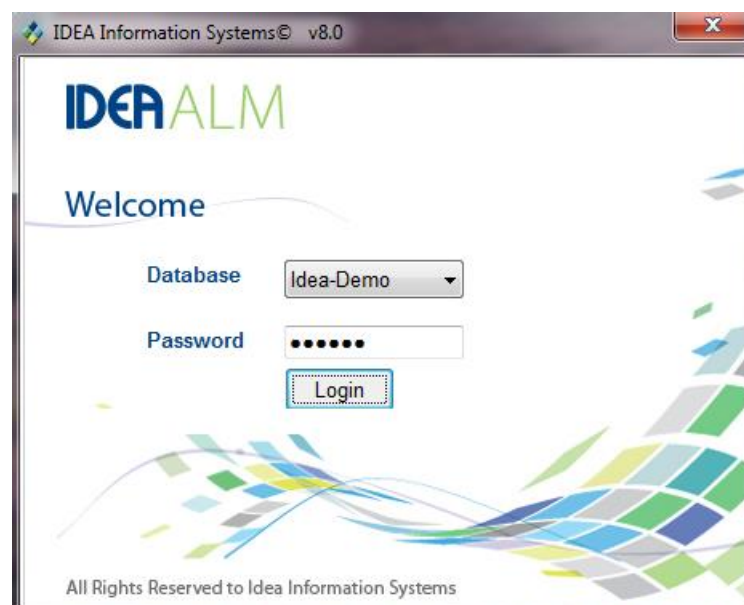
Templates are structures that contain all of an item's fields. IDEA@ALM is supplied with a large number of predefined templates and fields that cover most item types found in libraries, archives, museums and information centers. The staff user can modify existing templates, and define new ones according to the institution's needs.

Each template contains fields that are relevant to the types of items. For example a **book** template will contain an ISBN field, whereas a **movie** template will contain a length of film field. Templates determine the infrastructure of the items notebook. Each template contains a certain number of fields with appropriate defaults, in a certain order with all the cataloging preferences.

Fields

Fields are the basic building blocks of the system. They are defined in the **Fields Table**, and new fields can be added by the staff user. Fields are categorized into different types, according to the information they include: free text, numbers, tables (which are comprised of a list of values), dates, text and tables of values together, connecting fields which are used to link items and fields that are calculated. Input fields are used to enter and display information, whereas information fields are for display only and are not determined by the user.

Entering IDEA@ALM





1. To access the system with the default database, enter your password and click **Login** or **Enter**. To access the system with a different database, click the drop-down in the **Database** field and select the database

The IDEA@ALM main menu will be displayed on the left of the screen. Note that the sections displayed in the main menu vary depending on the modules purchased.

Exiting IDEA@ALM

1. Close all active screens. Screens can be closed by:

- Selecting the **Close** icon  from the secondary toolbar; or

- Select the **Exit** icon  , from the main toolbar

2. A prompt will be displayed, verifying that the system should be exited. Select **Yes**. The IDEA@ALM system will be shut down.

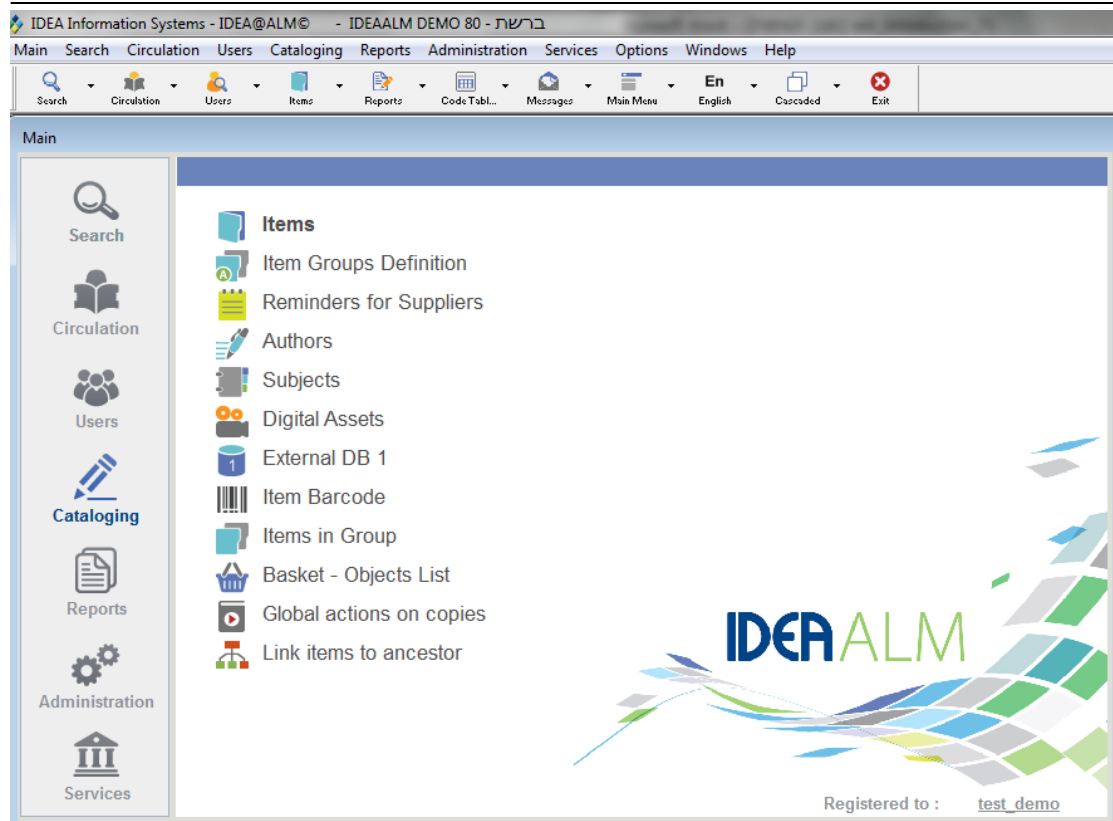
Notes:

3. It is imperative to back up all the data before shutting down the computer. See the **Backup** section in this chapter, or consult with your system administrator.
4. At the end of each work day, make sure to properly shut down the computer.
1. If **Exit** is selected while there are active screens, a prompt will appear regarding screens with unsaved changes. Save or cancel the changes, and then exit the system again.

Working with IDEA@ALM – Menus and Toolbars

Actions are performed in the system through the main menu, the menu line and toolbars.

Upon entering the system, the main menu, the menu line and the main toolbar are displayed:



Main Menu

The main menu is comprised of six sections that are listed on the left of the screen:

- | | |
|--------------------|--|
| Search | Retrieve items from the IDEA@ALM database. |
| Circulation | Perform loans and returns; place orders; place holds on items for users and branches; and send reminders to users. |
| Users | Add new users; retrieve, view and update user details; delete existing users; view and manage user lists; import users from external sources, manage user groups and branch groups; produce and print user barcode stickers; and manage payment types and deposits. |
| Cataloging | Add new items; retrieve, view and update item details; delete existing items; manage item groups, import items from external sources; construct lists of subjects; create connections between items; define reminders for suppliers, manage authors, define digital object types, and produce and print item barcode stickers. |
- Items can be physical or virtual, and include books, periodicals, compact disks, video cassettes, museum artifacts, archived files and documents, auxiliary items, digital files, web sites, e-resources and more.

Reports Produce reports; build new reports from scratch; build new reports based on existing reports; edit and modify existing reports.

Administration The **Administration** section is used for many system definitions and functions, such as defining templates and user defined tables; determining user levels and their authorizations; defining synonyms; and e-mail management. See the **Administration** chapter for complete details.

The main menu may include additional modules that were purchased separately such as **Acquisitions**, **Thesaurus** and **iExhibitor**.

Menu Line

Upon entering the system, the menu line includes the sections of the main menu, and the following additional general operations. This menu line is displayed when the main menu is displayed and when working in the **Search** module.

Main	Search	Circulation	Users	Cataloging	Reports	Administration	Services	Options	Windows	Help
------	--------	-------------	-------	------------	---------	----------------	----------	---------	---------	------

Main Language definition and general information about the active section.

Options Change the current user by entering a different password and restore default list display styles. Open the **Location change for items** window

Windows Display the names of the windows that are currently open.

Help Display the help of the current section in PDF format.

When working in lists, the following menu line is displayed:

List	Tools	Display	Windows	Help
------	-------	---------	---------	------

List Functions performed at the list level such as inserting, updating and deleting items in the list and printing the list. The options listed in the drop down menu are identical for all lists, but some are not always active. Most of the functions in this menu are also available from the secondary toolbar.

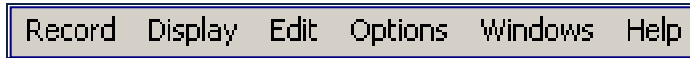
Tools This menu is constant for all modules. It is used for performing search queries on the modules' lists, printing labels and producing activity logs.

Display This menu is constant for all modules. It is used for customizing the display of lists and searches.

Windows Display the names of the windows that are currently open.

Help Display the help of the current section in PDF format.

When working in notebooks, the following menu line is displayed:



- Record** Functions performed at the record level such as copying the record, navigating to the next/previous record, inserting/deleting lines and printing the record. The options listed in the drop down menu are identical for all notebooks, but some are not always active. Most of the functions in this menu are also available from the secondary toolbar.

- Display** Determine display parameters (the columns that will be displayed, the text size and whether or not the screen will be split) and restore default list display styles in the notebook's active tab.

- Edit** Editing functions that can be performed on input fields (copy, cut, paste etc).

- Options** This menu includes miscellaneous functions, including displaying a record for viewing (as opposed to the record in the notebook which is displayed for viewing and editing); adding barcodes to new copies; and exporting/importing items from external sources. The options listed in the drop down menu are identical for all notebooks, but many are not always active.

- Windows** Display the names of the windows that are currently open.

- Help** Display the help of the current section in PDF format.

Main Toolbar

The main toolbar includes the sections of the main menu, and additional general operations. It remains stable. For each section, the last used option's icon is displayed. Hover over the icon to see the option name. Select the arrow to the right of the icon to display all the options in the section for selection.



Main Menu / User Change

Open the main menu or change the current user by entering a different password.

- Language** The current language is displayed. Select the arrow beside the language to display available languages, and select the desired language.

Ranking Windows

Determine whether open windows will be displayed as layered (only the active screen is shown) or cascaded.

Exit Exit the system.

Secondary Toolbar

The secondary toolbar includes functions that are performed on the active window. It changes according to the module, option, work environment (list or record) and active tab. Many of the functions in the secondary toolbar are also available from the **List** drop down menu (when the active window is a list) and the **Record** drop down menu (when the active window is a notebook).

Secondary toolbar when the active window is the **Items** list:



Secondary toolbar when the active window is the item notebook's **Main** tab (before changes have been made, and therefore the **Save** and **Cancel** icons are not active).

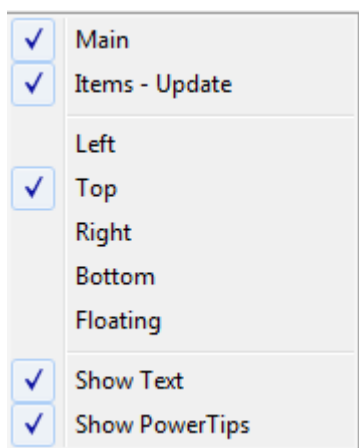


Secondary toolbar when the active window is the item notebook's **Main** tab (when changes have been made and therefore the **Save** and **Cancel** icons are active and the **Add Record**, **Previous Record**, **Next Record** and **Close** icons are not active).



Customizing the Toolbars

The main toolbar and the secondary toolbar are customized in the same manner. Right click on a toolbar. A menu will appear.



The upper part of the menu lists the main toolbar (**Main**) and the current secondary toolbar (**Items – Edit** in the example above).

The middle part of the menu determines the location of the toolbar. The options are **Left**, **Top**, **Right**, **Bottom** and **Floating**. When using the **Floating** option, the toolbar can be moved using the left mouse button.

The lower part determines whether text and power tips will be shown. Check the **Show Text** option to display the name of the icon underneath it. Check the **Power Tip** option to see the option name when hovering over the icon.

Working with IDEA@ALM – Lists, Notebooks and Tables

Most of the work in the system is performed using lists, notebooks and tables. This section explains in detail how to work with each one of them.

Note: It is advisable to close windows when finishing working with them. Although it is possible to work with several open windows, this considerably slows down the system.

Lists

Lists display all the records in a category. The **Items** list is the catalog. Each item is one record. Examples of other lists are **Users** and **Loans**. The records in these lists are respectively users and loans. In the documentation, the term **record** is used for any type of record, whereas the term **item** is only used for items in the catalog.

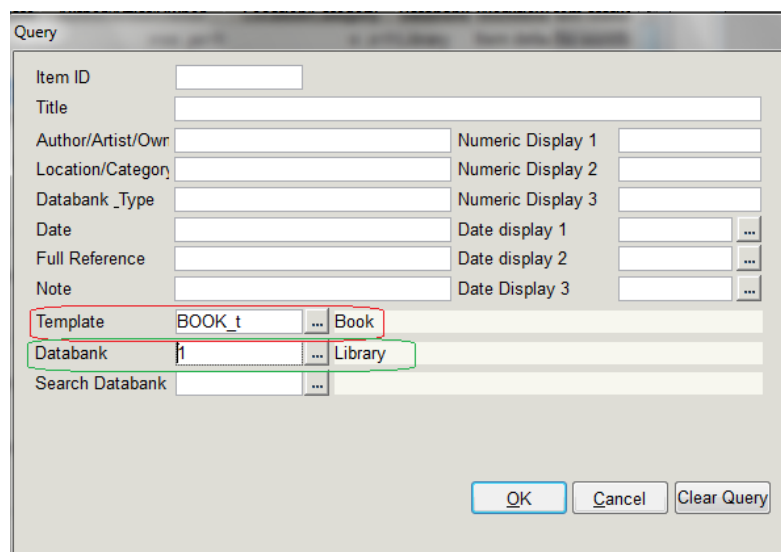
Lists are the starting point for working with records. The **Items** list is displayed when the **Items** option is selected from the **Cataloging** menu; the **Users** list is displayed when the **Users** option is selected from the **Users** menu, etc.

Searching a List

All lists can be searched using the **Query** search or the **Advanced Query** search.

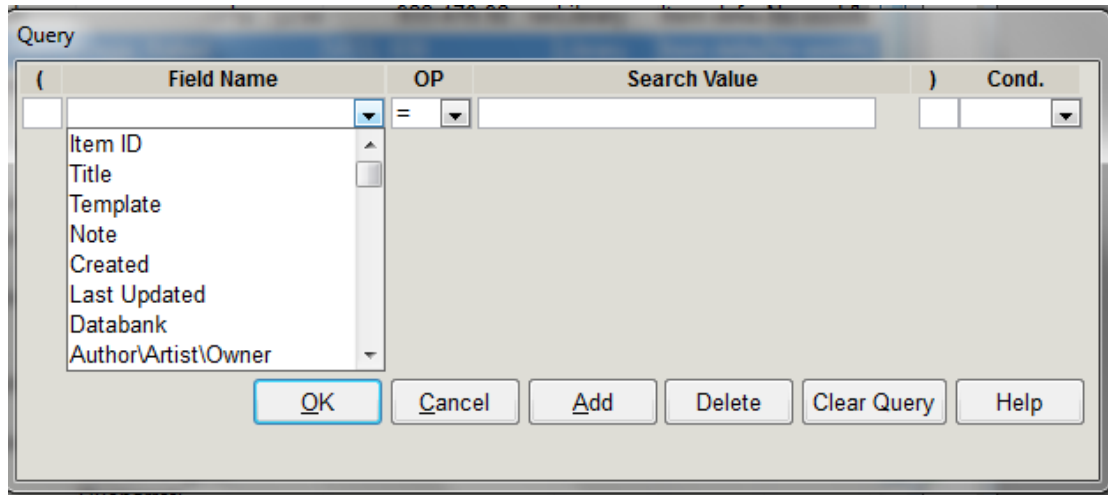


Select the **Query** icon . The **Query** window will be displayed:





Select the **Advanced Query** icon. The **Advanced Query** window will be displayed:



Fill in the query and select **OK**. The search results will be displayed as a list. If only one result is returned, the record's notebook will be displayed.

When searching the items list (**Cataloging / Items**), subjects list (**Cataloging / Subjects**), or tables list (**Administration / Values for User Defined Tables**), fields that are not available in the **Simple Query** and the **Advanced Query**, can be



searched using the **Textual Search** (select the **Textual Search** icon from the secondary toolbar).

See the **Search** chapter for more details about searches.

Note: The **Textual Search** will include the fields that were defined using the cataloging, subjects, or tables notebook in the **Administration / Textual Search Definitions** option. See the **Administration** chapter for more details.

Viewing and Updating a Record



Double click on the record or highlight the record and select the **Update** icon from the secondary toolbar. The record's notebook will be displayed for viewing and updating. Make changes as needed and save the record by selecting the **Save** icon




from the secondary toolbar or by typing **Ctrl + S**.


Adding a New Record





Make sure the list is the active window. Select the **Insert** icon from the secondary toolbar. An empty notebook will be displayed. Enter the details and save

the record by selecting the **Save** icon  from the secondary toolbar or by typing **Ctrl + S**.


Adding a New Record by Copying an Existing Record

Make sure the list is the active window. Select the **Insert** icon  from the secondary toolbar. An empty notebook will be displayed. Select the **Copy Record**

icon  from the secondary toolbar. A window with the list of records will be displayed. Select the record to be copied from the list by double clicking or by highlighting it and selecting **Select**. The **Copy Record** window will be displayed, with a prompt to confirm that the new item will have the same template as the copied item. Select **Yes** to use the copied item's template or **No** to use the template defined in the item notebook. The copied item's details will be registered in the item notebook. Make changes as needed and save the record by selecting the **Save** icon

 from the secondary toolbar or by typing **Ctrl + S**.

Deleting One Record from a List

Highlight the record on the list and select the **Delete** icon  from the secondary toolbar. A prompt will be displayed, verifying that the record should be deleted. Select **Yes**. The record will be deleted from the database.

Deleting a Number of Records from a List

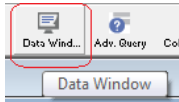
Perform a search to produce the list of items to be deleted (using one of the search queries **Query**, **Advanced Query**, or **Textual Search**). From the main menu bar select **List / Delete All Items in the List**. A prompt will be displayed, verifying that the records should be deleted. Select **Yes**. The records will be deleted.

Note:

1. A record can only be deleted if it is not connected to any other record in the system. For example, a user that has loans, or an item that has loaned copies, cannot be deleted.
2. After confirming deletion there is no option to restore the deleted records. It is recommended to perform a backup before deleting records.

Presenting Additional Information

In some lists, such as **Items** and **Users**, additional information about the highlighted

record can be displayed. Select the **Data Window** icon  from the secondary menu. The information will be displayed. Use the arrows to display additional information about the previous/next record.

Printing a List



Make sure the list is the active window. Select the **Print** icon from the secondary toolbar. The **Print** window will be displayed.

Mark the **Print Preview** checkbox in order to preview the printout.

Mark the **Print Window Rows Only** checkbox in order to print only the rows that are displayed in the current window.

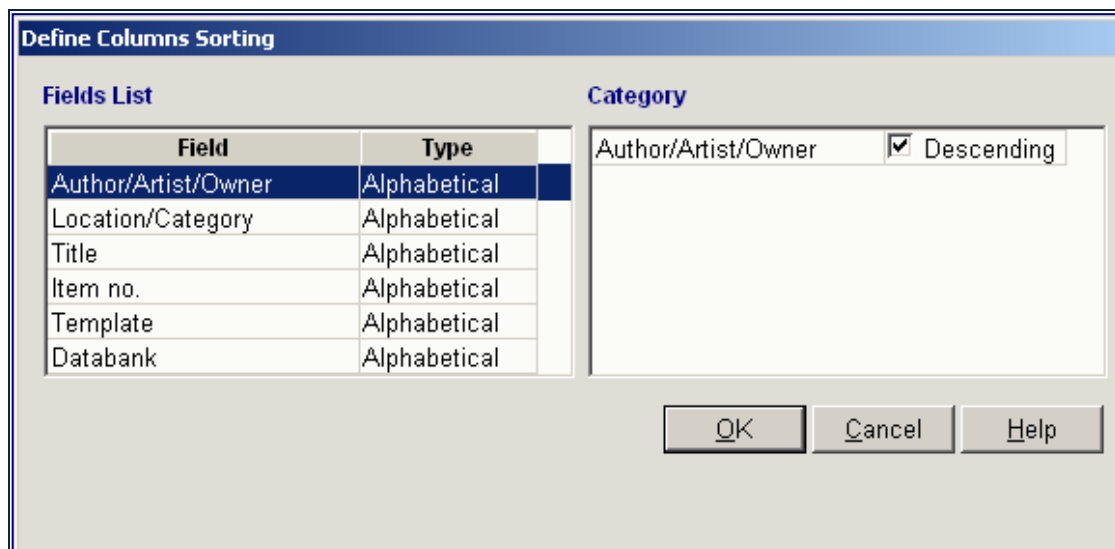
Select **OK** to print. The search results will be printed.

Sorting a List

Double click on the heading of any column, to sort the list by alphabetic or numeric order, according to the content of the column. Double clicking again on the column will reverse the sort order (ascending/descending).



A secondary search can be defined by selecting the **Sort** icon from the secondary toolbar. The **Define Columns Sorting** window will be displayed.



The window is divided into two parts. The left part, **Fields List**, displays all the fields in the list. The right part, **Category**, displays the fields that are used for sorting. The list will first be sorted by the first field on the list, and the subsequent items on the list will be used for the secondary sort, etc. Select the **Descending** checkbox next to the field for sorting in descending order, or leave the checkbox unmarked to sort in ascending order.

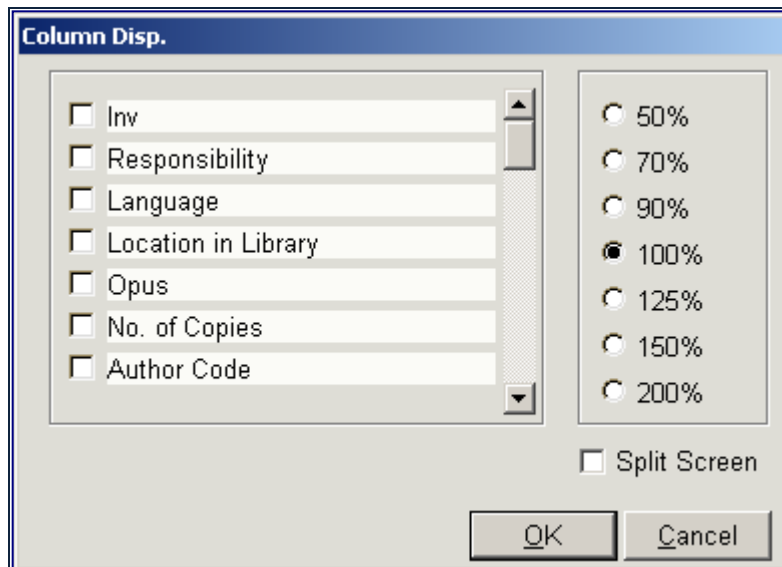
Fields are added or removed from the **Category** list by clicking on the field in the **Field List**.

After completing the definitions, select **OK**. A prompt will be displayed. Select **Yes**. The list will be sorted

Customizing a List


Adding and Deleting Columns

Select the **Column Display** icon  from the secondary toolbar (this is the same as selecting **Display / Column Display** from the menu line). The **Column Display** window will be displayed.




All the available fields will be displayed. Each field in the **Column Display** window represents a column in the list. Mark a field to add the column to the list, and unmark a field to delete the column from the list. Select **OK**.

Determining the Text Size

Select the **Column Display** icon  from the secondary toolbar. The **Column Display** window will be displayed. The text size is defined as a percentage. The default is 100%. Select a lower percentage for smaller text or a higher percentage for larger text. Select **OK**.

Splitting the Screen

Splitting the screen is useful when the list has many columns. Select the **Column**

Display icon  from the secondary toolbar. The **Column Display** window will be displayed. Mark the **Split Screen** checkbox. Select **OK**.

To change the division of the screen, position the cursor at the bottom of the division line, hold down the left mouse button and drag the line as needed.

Defining a Column's Width

Position the cursor to the right of the column heading, hold down the left mouse button and drag the line to the right to widen the column or to the left to make it narrower.

Defining the Columns' Order

Position the cursor on a column heading, hold down the left mouse button and drag the column to the desired position.

Hiding Records in a List

It is useful to hide records in order to print a partial list of search results. Each record is one row. Mark the rows to be hidden by holding the **CTRL** key and selecting the desired rows. Select **Display / Show/Hide Rows / Hide Selected Rows** from the menu line. The selected rows will be hidden.

In order to show all hidden records, select **Display / Show/Hide Rows / Show Hidden Rows** from the menu line.

In order to select all the rows at once, select **Display / Show/Hide Rows / Select All Rows** from the menu line.

Restoring the Default Settings

Make sure the list is the active window. Select **Display / Restore Defaults for Lists Display Styles** from the menu line. A prompt will be displayed, verifying that the default display style should be restored. Select **Yes**. The default display style will be restored.

Notes on Customizing Lists:

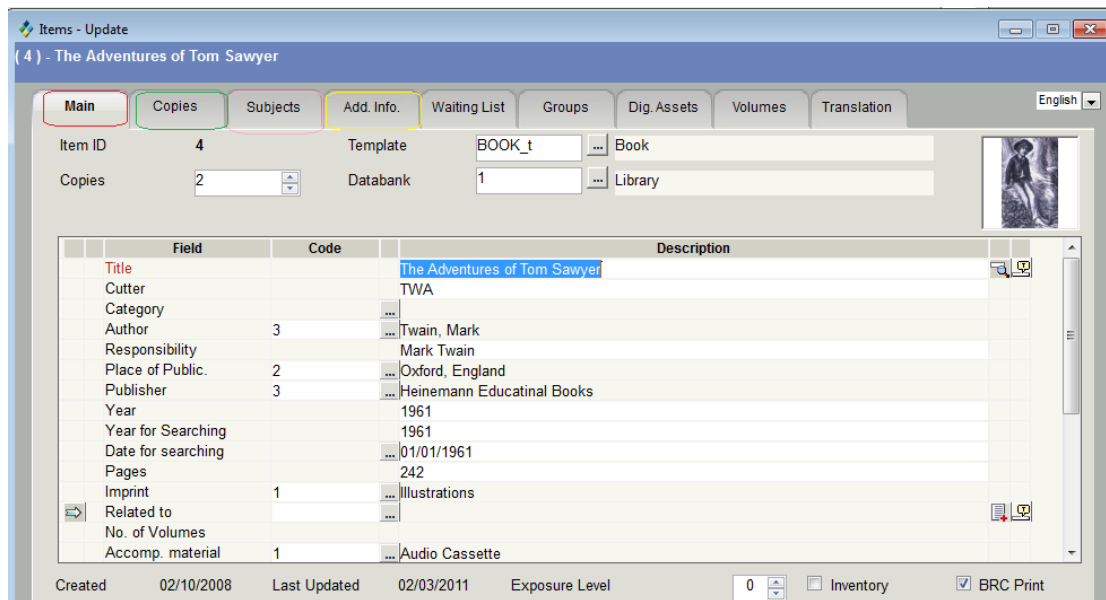
1. These actions are available if the user has permission to update the display, and the lists are defined as active in **Administration / Configuration File / Global Parameters / Parameter 47 – Lists design active**.
2. The changes made in customizing lists will be retained at the user level until the next change, or until the default display style is restored.

Notebooks

All the record definitions are managed using notebooks. Instructions for creating, editing and deleting records were presented in the **Lists** section above.

Using Tabs

Each notebook is divided into several tabs.




The first tab, **Main**, always contains basic information such as the record's name and unique ID code. When a new record is created, the **Main** tab will be active (not gray) and all the other tabs will be inactive (gray). After saving the record, the other tabs will become active.

Selecting the header of a tab, displays the tab. When the tab is edited the header appears in red. In order to move to another tab, or close the notebook, the changes

must either be saved, by selecting the **Save** icon  from the secondary menu, or

canceled, by selecting the **Cancel** icon  from the secondary menu.

Entering Data

Data can be entered in the notebook's fields by typing, choosing a value from a list, or choosing a value from a table. In the **Date** field, dates are determined by typing or by invoking the calendar using the  icon.

Note: Every record has a unique ID code. By default, the system will automatically determine the code. To do so, leave the value *[num]* that appears in the field in the **Main** tab. After saving the record for the first time, the number will be allocated by the system. It will be the next running number (or another number that has been previously configured).

Adding Lines

Some tabs are comprised of a list of objects. For example item groups (created in **Cataloging / Item Groups**) are comprised of a list of items that belong to the group. These items are determined by adding lines to the **Items** tab in the **Item Groups** notebook.



To add a line to a tab, select the **Insert Row** icon from the secondary menu. A window with a table of the available entries will be displayed. Select an entry. See the **Tables** section below for more details.

Deleting Lines

In order to delete a line from a tab, highlight the line and select the **Delete Row** icon



from the secondary menu.

Information Display on a Record



In some notebooks such, as **Items** and **Subjects (Item List tab)** additional





information about the item can be displayed. Select the **Display Item** icon from the secondary toolbar. The information will be displayed in the item notebook. The notebook is open for display only. Updates cannot be performed.

Tables

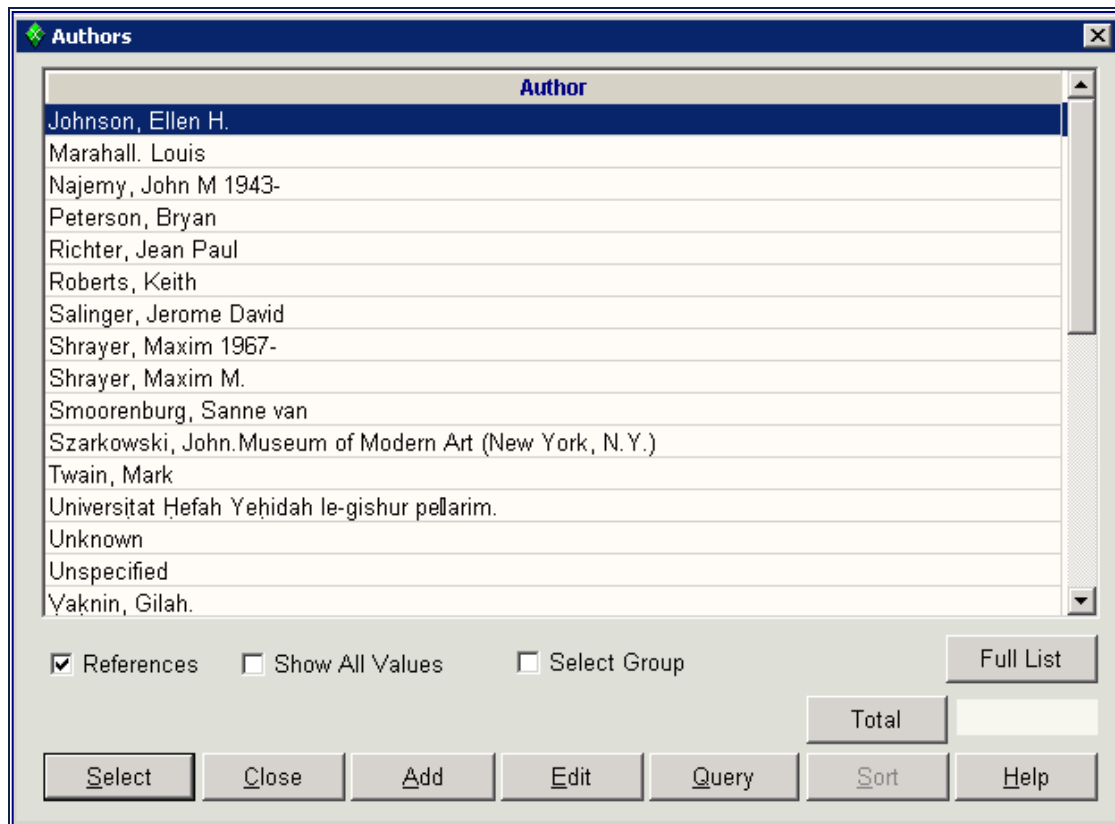
Tables are used for organizing information under a certain category, such as **Authors, Subjects, Publishers** or **User Groups**. In addition to the predefined tables in the system, the staff user can define tables using the **Administration / User Defined Tables** option and enter values in these tables using the **Administration / Values for User Defined Tables** (see the **Administration** chapter for more details about user defined tables). Tables are accessed in the following ways:

- From the main menu or main toolbar. For example **Cataloging / Authors** or **User / User Groups**. Code tables are accessed from **Administration / Code Tables**.
- From the notebook by selecting the  icon. For example, when cataloging an item, the name of the author must be entered in the **Author** field in the item notebook's **Main** tab. The name of the author can be typed or selected from the **Authors** table which is invoked when the  icon is selected.

- From the notebook by selecting the **Insert Row** icon  from the secondary menu. For example, a user is added to a user group from the

Users tab in the user group notebook. When the **Insert Row** icon  is selected, the **Users** table is displayed.


The management of the table is performed from the table's window. The window includes the following options:

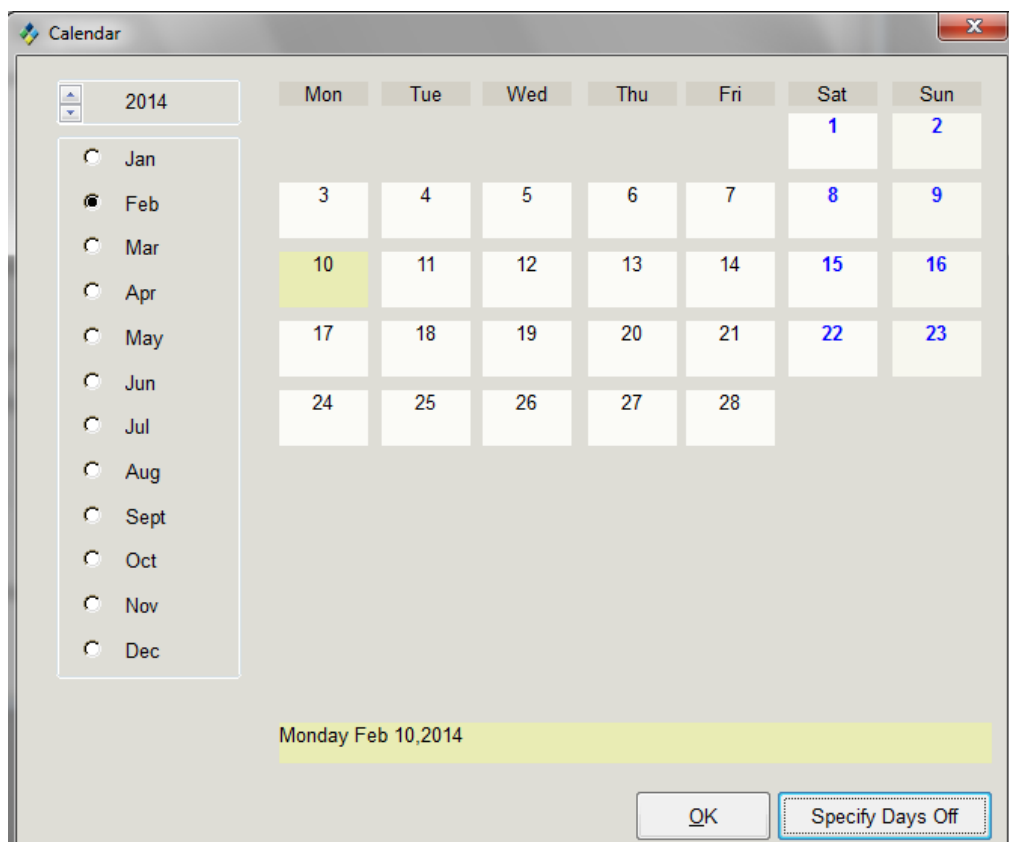


Value / Search	Type the name of a value or the first letters/digits in the Value field and select the Search button to search for records in the table. The records answering the search definitions will be displayed.
Select	Select an entry by highlighting it and selecting Select .
Close	Select Close to close the window without selecting an entry.
Add	When this button is active (not gray), records can be added. Select Add . An empty record notebook will be displayed. Fill in the details and save the record.
Edit	When this button is active (not gray), records can be updated. Highlight the desired record and select Edit . The record's notebook will be displayed. Make changes as needed and save the record.
Query	When Query is selected, a Query window will be displayed. Fill in the query details and select OK . The records answering the query definitions will be displayed.
Sort	Sort the displayed table. See the Sorting a List section above for more details.

Help	Display the help of the current section in PDF format.
Textual	<p>This button is available when textual search definitions have been defined. It is used to perform searches on additional fields that are not available using the Search button.</p> <p>The fields are defined in Administration / Textual Search Definitions.</p>
Select Group	<p>This checkbox is available when more than one record can be chosen.</p> <p>Mark the Select Group checkbox in the window. An additional list will be opened in the lower part of the screen. Double click a record, or highlight it and select the down arrow or drag it to the lower part of the screen. The record will appear in both windows. Repeat for all the records that will be chosen and click Select.</p>

Using the Calendar

The calendar is useful for filling in date fields such as **Cataloging Date**, **Loan Date**, and **Expected Return Date**. It is also used to define the days when the library is closed (see the **Calendar** section in the **Administration** chapter). Open the calendar by selecting the  icon next to the date field. The calendar will be displayed:



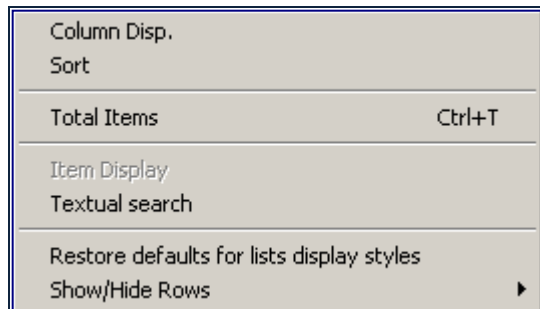
Select the year, month and day and select **OK**.

Right Mouse Button Functionality

In various places in the system, clicking the right mouse button opens a menu with different options that are relevant to the current window.

In Lists

When working in lists, clicking the right mouse button opens a menu that enables the user to change the list definitions. See the **List** section above for complete details.



Column Disp. activates (displays) the **Column Display** window.

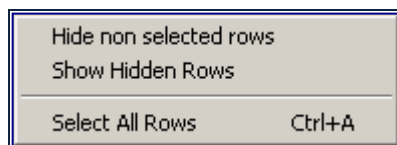
Sort activates (displays) the **Define Columns Sorting** window.

Total Items displays the total number of items in the list. This is the same as selecting the **Total Items** button at the lower part of the screen.

Textual Search activates (displays) the **Search** screen.

Restore Defaults restores the list's default settings. A prompt will be displayed, verifying that the default display style should be restored. Select **Yes**. The default display style will be restored.

Show/ Hide Rows – This option opens a submenu with the following options:



Hide Non-selected Rows - After selecting rows using the CTRL key, hide from the list all rows that were not selected.

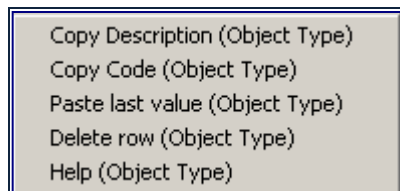
Show Hidden Rows displays all rows again.

Select All Rows selects all the rows in the list.

In Notebooks

When working in notebooks, clicking the right mouse button opens different menus when standing on a field that is open for editing or on a field that is for display only (grey field). The actions are relevant to fields and not to lines. The current field name is displayed in parenthesis.

Display Only Fields (Tabular Values)



Copy Description – Copy the description in the **Description** column for pasting into any other text field.

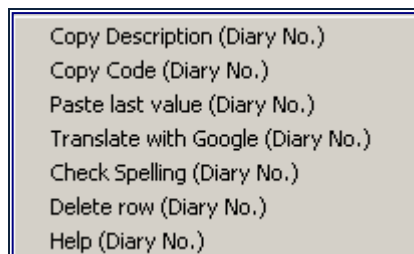
Copy Code – Copy the value in the **Code** column for pasting into any other text field.

Paste Last Value – Paste the last appropriate value. This option will paste in the code field the last code that was selected from the table linked to that field. This paste option is not the same as CTRL+V. For example, selecting **Paste Last Value** from the **Title** field will only paste data of a title type and not just any text that was copied using CTRL+C.

Delete Row – Delete the contents of the field, leaving an empty row.

Help – Display the help that was entered for this field. If no help was entered, a blank message will appear.

Text Fields



Copy Description – Copy the description in the **Description** column for pasting into any other text field.

Copy Code – Copy the value in the **Code** column for pasting into any other text field.

Paste Last Value – Paste the last appropriate value. This option will paste in the code field the last code that was selected from the table linked to that field. This paste option is not the same as CTRL+V. For example, selecting **Paste Last Value** from the **Title** field will only paste data of a title type and not just any text that was copied using CTRL+C.

Translate with Google – Open Google's translation tool for translating the content.

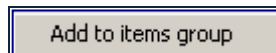
Check Spelling – Open the speller installed on the computer or the Microsoft Office speller for spellchecking the content.

Delete Row – Delete the contents of the field, leaving an empty row.

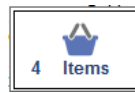
Help – Display the help that was entered for this field. If no help was entered, a blank message will appear.

In Basket

When working in the basket, clicking the right mouse button opens a menu with one function: **Add to items group**.



When this option is selected, the **Item Groups** window will be displayed. Select the group that the items will be added to.



Right clicking the **Basket** icon will open a menu with the following options:

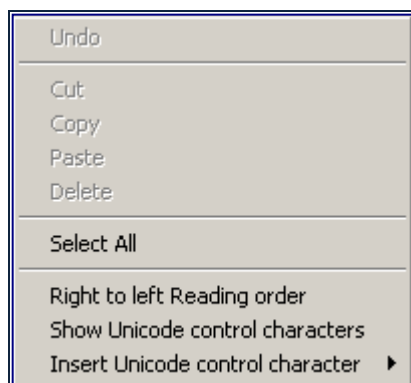
Hide – Hide the **Basket** icon. To display it again go to the **Options** menu and select **Show /Hide** basket.

Open Basket – opens the **Basket - Objects List**.

Empty Basket – empties all objects in the basket.

In Additional Information

When editing text in the **Add. Info.** tab, clicking the right mouse button opens a menu with standard editing functions and three additional functions.



Right to Left Reading Order – Change the direction of the text.

Show Unicode Control Characters – Select in order to display the Unicode control characters that are in the text.

Insert Unicode Control Character – When this option is selected, a list of Unicode characters and commands for editing the text will be displayed.

Resizing Screens

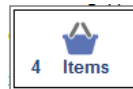
Every window can be stretched or reduced according to the screen's resolution and the user's preference.

Stand on a corner of the window or on one of the margins. The mouse pointer will change to a double-headed arrow. Drag the screen to the desired size. The display will be updated accordingly after releasing the mouse button.

Underlined Letters

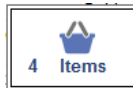
When there is an underlined letter on a button's label, typing the Alt key + the underlined letter is the same as selecting the button to invoke the command.

Basket – Objects List



The basket is a list that is used to quickly and easily access objects without running a search. Objects are added to the basket and removed by the user, and include any type of data: items, users, copies, user requests, orders and deliveries. Objects can be added to an item group from the basket.

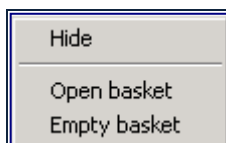
The basket is accessible from anywhere in the system, by clicking the **Basket** icon



The icon is, by default, located at the bottom right of the screen, and indicates the number of items currently in the basket.

The **Basket** icon can be hidden or shown by selecting **Options** from the menu line and selecting **Show/Hide Basket**.

Right clicking the basket icon enables hiding the basket, opening it or emptying it.



Adding an Object to the Basket

There are three ways to add an item to the basket: adding, dragging and inserting.

Adding

Highlight the items to be added to the basket. Select the **Add to basket** icon



from the secondary toolbar. The highlighted objects will be added to the basket.

Dragging

From any list, drag an object into the basket by left clicking on it, holding down the mouse and dragging the object into the basket. Note that the number of items in the basket will increase by one.

Inserting

To insert an object, open the basket by right clicking on it and selecting **Open Basket**. The **Basket – Objects List** will be displayed. Select the **Insert Row** icon



from the secondary menu. The **Entity Type** window will be displayed. Select the type of object to be added to the basket. A list of objects will be displayed. Select the object to be added to the basket. The object will be added to the **Basket – Objects List** and the number of items in the basket will increase by one.

Note that the various types of objects in the basket are identified by the icon in the left column of the **Basket – Objects List**.

Removing an Object from the Basket

Open the basket by right clicking on it and selecting **Open Basket**. The **Basket – Objects List** will be displayed. Select the item to be deleted and select the **Delete**



Row icon from the secondary menu. A prompt will be displayed, verifying that the object should be removed from the basket. Select **Yes**. The object will be deleted from the **Basket – Objects List** but will not be deleted from the system.

Filtering the Basket

The basket is comprised of different types of objects, such as items, users and orders. It is sometimes useful to display only certain types of objects in the basket. To do so, mark the **Filter by** checkbox at the bottom of the **Basket – Objects List** window. A checkbox will be displayed for each object type that can be used in the basket. Mark the desired checkboxes.

Exporting and Importing in IDEA@ALM

IDEA@ALM supports importing of items from various sources, and exporting items into a number of standard formats. The system supports the standard formats used in libraries, museums and archives: MARC with the Z39.50 search; ISAD(G) using EAD; ISAAR; Dublin Core; and simple text and XML files.

See the chapter **Exporting and Importing in IDEA@ALM** for more details.

Scheduler

The **Scheduler** is an option that is used to define in the database the automatic activation of various functions in the system. Its definitions are determined by the system administrator or DBA at the database level.

Schedule automatic running of:

- Saved queries, and also send them by e-mail. For example, send a weekly report on all new items cataloged in the system.
- Data export.
- Data import.
- Automatic extension of all the loans in the system, according to specific parameters.

To use this option consult the IDEA support team.

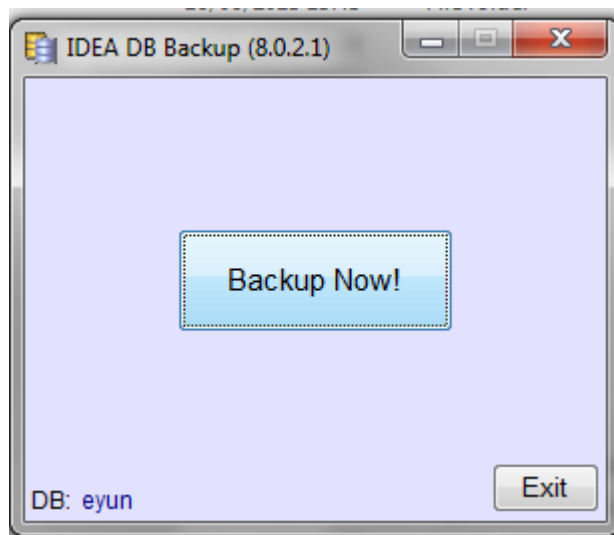
Backup

Data backup is a crucial part of ongoing work. Proper daily backup prevents the loss of stored data in case of a crisis such as damage to hard disks or stolen computers. The **Running Daily Backup** section below, presents basic instructions for performing daily backup. The following **Backup Definitions** section provides details for the system administrator.

Running Daily Backup

In order to run daily backup:

1. Double click on the **Backup Database** shortcut. The backup screen will be displayed:



Backup Definitions

The batch files include the commands that are used for the backup:

```
osql.exe -U sapirw -P sapirw -Q "BACKUP DATABASE ideaalm TO DISK =  
"<backup folder path>ideaalm_%XDate%.bak WITH INIT
```

External backups are strongly recommended. In order to add a command to perform an external backup, add a “copy” line to the batch files, defining the backup on one of the network disks (\USB\zip).

```
xcopy /v /y c:\ideaalm\bkp\backup1.bak F:  
pause
```