HELP DOCUMENTATION: Libris Design 5.0

Log In Screen

To begin using Libris DESIGN, type in your user name, and press the Enter key on your keyboard. Then type your password, and press the Enter key again.

New Users

1. Type New User in the User Name box.
2. Type NU in the Password box.
3. Press the Enter key.

Create a New User

1. Type in your name (or alias) and press the Enter Key.
2. Enter a password and press the Enter key.
3. Type the same password into the "Confirm Password" box and press the Enter key to set yourself up as a user and begin using the program.
4. Click “Exit Screen” to return to the Log In Screen and select your new user name from the pull down list of users.

Buttons on the Log in Screen

Click “Disclaimer” to read the legal disclaimer.

Click "System Specifications" to get System Requirements information.

Click “Acknowledgements” to see acknowledgements regarding the development of Libris DESIGN.

Click "Passwords" to change the password for an existing user.

Click “Exit” to exit from Libris DESIGN

Context sensitive Help is available throughout Libris DESIGN by clicking on the question mark “?” icon on the Libris DESIGN toolbar. The Help screen that appears will relate to the active window. Look for the window with a dark blue title bar relative to the other open windows.

Click the Dictionary button (book icon) on the upper right hand corner of the tool bar for definitions of terms used in Libris DESIGN, descriptions of Inventory Items, and explanations of basic planning assumptions in the database. There is an illustrated version of this Dictionary (Glossary) on the Libris DESIGN website.

Close any window in Libris DESIGN by clicking the x in the upper right hand corner of the screen. This will either return you to the previous screen in the program hierarchy, or close down the program if you are on the Login Screen.

Manage Models

In Libris DESIGN, you start with an expert created model representing a generic library of a given type (branch or main) and size (small, medium or large). You will select the expert model that most closely resembles the library you want to build and then tailor that model to your specific needs. Expert users may start with the blank model that is also available on the Manage Models Screen.

After you have worked with an Expert model, you will have created a “User Model” so you will have the option of selecting a User Model or opening a new Expert Model by making your choices from the top box, "Select an Expert Model" or from the lower box, "Select, Copy or Delete a User Model".

Import Models

When the Manage Models Screen is initially opened, there will be no User Models to choose from. When there are no User Models, you have the option of importing a model from another version of Libris DESIGN or restoring the backup version from another copy of Libris DESIGN. (See Back Up and Restoring)

1. Models created in Libris DESIGN 2.0, 2.1, 2.2 , 2.3 or 3.0 can be imported into Libris DESIGN 5.0.
2. Models created in Libris DESIGN 5.0 can be imported into other copies of 5.0 and all subsequent versions of the program.
3. You will choose the model you want to import or recover from those available on your desktop (or in folders on your desktop) after you click on the floppy disc icon on the lower half of the Manage Models Screen. (You will be importing the whole file not just a specific model.) Use your Windows explorer “Select a File to Import From” to find the file you want to import or recover. See the document “Import Models” for more detailed instructions.
4. All of the User Names, Passwords, and User Models will be transferred from the Libris DESIGN file you select. They will now be available to work on.

New Models

To work with a NEW EXPERT MODEL go to the "Select an Expert Model" box.

1. To see a list of all of the expert models in Libris DESIGN, click on the downward pointing arrow on the right side of the "Choose a Model" box to open a pull down list. Downward facing arrows on the right side of a blank white box indicate that a pull down list is available. Users may not type text into these boxes.
2. Select the Model that is the closest to the library you want to plan.

3. Click in the "Enter a name for your Library Model" box and type a name for your model. This name should distinguish your model from other models in Libris DESIGN.
4. Click the "I'm Ready" button to begin working with your model. After a series of status reporting screens, you will be taken to the "Library Model" screen.

Existing User Models

Go to the "Select, Copy or Delete a User Model" box to continue working on your own projects or User Models.

1. Click on the downward pointing arrow on the right of the "User Models" box for a pull down list and select the desired model. A downward facing arrow on the right side of a blank white box indicates that a pull down list is available. Users may not type text into these boxes.
2. Open a User Model by clicking the “Open” button to continue working with a model that you have worked with previously.
3. Copy a User Model by clicking the “Copy” button to create a copy of a model you have been working on. This allows you to work with and change a model while preserving the original version. It is a good idea to name the copy something that relates to the original model you are copying by adding version numbers or other descriptive text.
4. Delete a User Model by clicking the “Delete” button. This will remove any outdated or no longer needed models from Libris DESIGN. There is no undo for this action; once you have deleted a model, it is gone from Libris DESIGN permanently.

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Click the Dictionary button (book icon) on the upper right hand corner of the tool bar for definitions of terms used in Libris DESIGN, descriptions of Inventory Items, and explanations of basic planning assumptions in the database. There is an illustrated version of this Dictionary (Glossary) on the Libris DESIGN website.

To exit the Manage Models screen, press the "Close" button in the lower right hand corner of the screen or click on the x in the upper right hand corner of the screen.

The Library Model Screen

The Library Model Screen is your home base in Libris DESIGN. You will enter and exit the program from this screen after you have logged in and selected a user or expert model. This screen is also the gateway to the Reports Menu, the Collections Menu, the Budget Menu, and the Manage Models screen. On this screen you will set the basic parameters for your library such as space efficiency requirements and cost level for furniture and equipment. The Library Model screen contains an overview of the model you are working on including: the name and description, a list of Divisions in the model, the size and cost, and the date and time you created the model.

Parts of the Library Model Screen

Library Model Name
Library Model Description
Date and Time Library Model Was Created
Furniture and Equipment Cost and Space Summary
Collections Shelving Cost and Space Summary
Non-Assignable Space Summary
Default Space Efficiency
Default Cost Basis for Furniture and Equipment and Adjustment Button
List of Divisions in the Library Model
Division Names Changed by the User to be used in Reports
Total Cost and Assignable Square Feet for Each Division
Gateway Buttons To Reports Menu, Collections Screens, Budget Screen, and Manage Models Screen and Exit to Log In

Library Model Name. The name of the library you are currently working on will be displayed in the Model Name box. Change the name of the model at any time by typing a new name in the Model Name box.

If you are working on more than one model, clicking on the record navigation buttons at the bottom of the screen will move you to another model. The number to the right of the buttons “of 1” or “of 2” etc. will tell you how many user models are available. The name in the Model Name box will change.

Description. The description for the current model appears in the Description box and can be edited at any time by typing new text into the Description box.

Created. The Created box at the bottom of the screen will show you when you created the model.

Cost and Space Summary. The two right-hand columns (in red type) just under the description contain summary figures for cost and square footage for the furniture and equipment in this model. The figures are broken down by space and cost for furniture and equipment, space and cost for shelving the collections, and non-assignable space. The cost is for the furniture and equipment items and for the shelving, but not for the building to house them, and not for volumes on the shelf.

Space Efficiency. The default non-assignable ratio (space efficiency) in Libris DESIGN is 25% for all expert models. This percentage can be adjusted by entering a new figure in the box. Users are cautioned not to change this figure without good cause.

Default Costs. The default costs for all Libris DESIGN expert models are based on moderate cost figures. The cost basis can be changed by clicking the "Change F&E Cost Button," clicking on the downward arrow on the right side of the box, and selecting Low or High from the pull down list. (Throughout the program you open pull down or pick lists by clicking on the downward pointing arrow. A downward facing arrow on the right side of a blank white box indicates that a pull down list is available. Users may not type text into these boxes.)

Hit the enter key or hit return to activate the change. Default costs in the user model will be changed, but costs which the user has entered that override the default cost will not be changed. See Space Screen for help with overriding costs.

Divisions

Each Library Model can consist of many Divisions. The Library Model Screen lists the Divisions in alphabetical order and includes the cost and square footage for each Division. The cost is for the purchase of furniture and equipment items, not construction cost for the building to house them. To the right of the Division Name any name changes "To Use in Reports" will be listed next to the appropriate Division; i.e., if the User renames Reference Services to Information Services, these changes will be listed on the Library Model Screen.

Scroll from the top to the bottom of the Division list using the scroll bar on the right hand side of the Division list to see all of the Divisions. <u>Do NOT use the mouse wheel for this function; it will change the active library model shown on the screen. The wheel does not function as a scrolling tool in Access.</u>

Adding a Division

1. Scroll to the bottom of the Division List until you are at the first blank line. You will see an asterisk (*) on the left side of the blank line. (Throughout the program this asterisk will be your indication that you are on a new record.)
2. Click on the downward pointing arrow to the right of the blank box to open the pull-down or pick list to see all of the Divisions available to choose from. (Throughout the program, clicking on the downward pointing arrow will open pull down or pick lists. A downward facing arrow on the right side of a blank

white box indicates that a pull down list is available. Users may not type text into these boxes.)

3. Choose a Division to add by clicking on a Division name on the pick list. You cannot add a Division that duplicates a Division already in your Library Model. If you try to do this, you will get a "duplication" error message and will need to choose a different Division. If you get stuck in the error message, press the Escape key once. (Throughout the program hitting the Escape key will get you out of many error messages. If you are still stuck in the error message, press the Escape key again --twice should do it.)
4. To save your new Division, hit Enter or click on the pencil symbol to the left of the Division name box. (Throughout the program you may change your mind about changes before they have been saved by hitting the Escape key.)

Gateway Buttons

The following buttons are on the bottom of the Library Model Screen. These functions can only be accessed from the Library Model Screen.

1. Clicking the "Exit to Log in Button" will take you back to the Log in screen.
2. Clicking the "Budget Button" will open the Budget screen where you will work on the project budget for your user model.
3. Clicking the "Reports Button" will take you to the Reports menu where you can choose from reports in seven categories, or work on organizing your final building program menu.
4. Clicking the "Collections Button" will open the Collections Type screen where you will customize the collections in the expert model to match your collection profile. The Collections Type screen is the gateway to the Collection Allocation screen where you will manage the overview of your collections.
5. Clicking the "Manage Models Button" will open the Manage Models screen where you can open a new expert model, delete an existing user model, or copy an existing user model to create a new version.

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Click the Dictionary button (book icon) on the upper right hand corner of the tool bar for definitions of terms used in Libris DESIGN, descriptions of Inventory Items, and explanations of basic planning assumptions in the database. There is an illustrated version of this Dictionary (Glossary) on the Libris DESIGN website.

Close any window in Libris DESIGN by clicking the x in the upper right hand corner of the screen. This will either return you to the previous screen in the program hierarchy, or close down the program if you are on the Login Screen.

The Division Screen

The Division Screen provides an overview and detailed information for each Division contained in the Library Model. It shows total cost (in red type) for furniture and equipment and total square footage for furniture and equipment only (Not Collections) for the individual Division. It also shows the grand total of cost (in red type) and square footage (red type) for the Library Model. The Division Screen shows a list of Spaces contained in the Division and any names, which have been changed in the "Name to be Used in Reports " box.

Opening a Division Screen

1. On the Library Model Screen, click on the vertical Division button/bar on the left hand side of the Divisions list. This will open the first Division on the list; or,
2. Double click on the Division name for the Division you want to open.

View the Contents of a Different Division

1. Click on the record navigation button at the bottom of the screen to open the Division Screen for a different Division. The numbers will tell you (5 of 12) how many Divisions there are in your model, and which one is open. Check the name in the Division Name box to verify that you are working on the right Division.

Parts of the Division Screen

Division Name
Division Name to Use in Reports (Customized by User)
Cost of Furniture and Equipment in Division (Red type)
Assignable Square Feet in Division (Red type)
Grand Total Space (Assignable and Non-Assignable Space) for Library Model
Grand Total Cost for Furniture and Equipment and Shelving for Library Model
Delete Division Button
Close Screen Button
Gray tabs which open Division Detail boxes containing editable text about the Division
List of Spaces Contained in the Division
Space Names changed by the User to be used in Reports
Space Allocation and Cost of Furniture and Equipment For Each Space
Record Navigation Tool Bar

Division Name. This box contains the name of the Division that appears on the screen.

Name to Use in Reports. This feature allows you to rename a Division (e.g., from Literacy Division to Family Literacy Division), to customize the name of a Division (e.g., The John Q. Donor Family Literacy Division), or to select a Division that is close in content to a Division you would like to add to your model. An example of this might be a specialized language collection, like Indo-European Language Collection, which is not available in the Expert Models. In this case you might select a different Division (such as Spanish Language Collection), customize it and rename it to meet your needs. The "Name to be used in Reports" you have entered will appear in all printed reports and will appear to the right of the default Space Name on the Division Screen.

Model Totals. The red figures in the upper right hand corner are the grand total of space (assignable and non-assignable) and cost (furniture and equipment and shelving) for the library model. These figures are provided in the same location on every screen to track progress as users work on Collections, Divisions and Spaces.

Division Information

The Division Information Screen contains a list of all of the Spaces contained within the Division in the Library Model. It includes a summary of square feet for furniture and equipment (not collections) and cost for furniture and equipment (not shelving.) Each Division consists of one or more Spaces.

Gray Tabs

The gray tabs on the Division Screen open folders, containing editable text or a place to insert text that defines the characteristics of a Division. These are called Division Details. Users will add, delete, and edit the text in these boxes as they work on User Models.

1. The Division Info Tab is the Division Screen when opened.
2. The Function Tab opens a box containing text which describes the function of the Division. This box contains text in the Expert model which can be edited or deleted.
3. The Relationships Tab provides text which details preferred adjacencies (spatial relationships) to other Divisions in the Library Model. Users will add or edit the text here as the building program is customized.

If no text appears under a tab, no data or heading will appear in the reports.

Deleting a Division from the Library Model

1. Double click on the Division name and go to the Division screen for the Division you want to delete. To verify that you are on the right screen, check the Division Name bar at the top of the screen.
2. Place the cursor on the name of the Division you want to delete.

3. Click the Delete Division button on the lower left hand side of the screen.
4. There is no undo for delete.

Spaces

Each Library Division can consist of many Spaces. The Division Screen lists the Spaces in the Division in alphabetical order as well as the cost and square footage for each Space. Scroll from the top to the bottom of the Space list using the scroll bar on the right hand side of the Space list to see all of the Spaces .

Adding a Space

1. Scroll to the bottom of the Space List until you are at the first blank line. You will see an asterisk (*) on the left side of the blank line. (Throughout the program this asterisk will be your indication that you are on a new record.)
2. Click on the downward pointing arrow to the right of the blank box to open the pull-down or pick list to see all of the available Spaces. (Throughout the program, clicking on the downward pointing arrow will open pull down or pick lists. A downward facing arrow on the right side of a blank white box indicates that a pull down list is available. Users may not type text into these boxes.)
3. Choose a Space to add by clicking on the Space name on the pick list. You cannot add a Space that duplicates a Space already in your Library Model. If you try to do this, you will get a "duplication" error message and will need to choose a different Space. If you get stuck in the error message, press the Escape key once. (Throughout the program hitting the Escape key will get you out of many error messages. If you are still stuck in the error message, press the Escape key again --twice should do it.)
4. To save your new Space, hit Enter or click on the pencil symbol to the left of the Space name box. (Throughout the program you may change your mind about changes by hitting the Escape key before they are saved.)

Viewing the Contents of a Space

1. Click on the vertical Space button/bar on the left hand side of the Spaces list. This will open the first Space on the list; or,
2. Double click on the Space name for the Space you want to open.

Viewing the Contents of a Different Space

1. Click on the record navigation button at the bottom of the screen to open the Space Screen for a different Space. The numbers will tell you (5 of 12) how many Spaces there are in that Division, and which one is open. Check the

name in the Space Name box to make sure you are working on the right Space.

Deleting a Space from the Division

1. This is done on the Space Screen. (See Below)

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Click the Dictionary button (book icon) on the upper right hand corner of the tool bar for definitions of terms used in Libris DESIGN, descriptions of Inventory Items, and explanations of basic planning assumptions in the database. There is an illustrated version of this Dictionary (Glossary) on the Libris DESIGN website.

To exit the Division Screen you can either click the "Close Screen" Button to get back to the Library Model Screen or click on the x in the upper right hand corner. To move forward to the next level of detail, proceed to a Space screen to continue.

The Space Screen

The Space screen provides both summary and detailed information for each Space within the Library Model.

Opening a Space Screen

1. On the Division Screen, click on the vertical Space button/bar on the left hand side of the Spaces list. This will open the Space Screen for first Space (alphabetically) on the list; or,
2. Double click on the Space name for the Space you want to open.

Viewing the Contents of a Different Space in the Division

1. On the Division Screen, click on the record navigation button at the bottom of the screen to open the Space Screen for a different Space. The numbers will tell you (5 of 12) how many Spaces there are in that Division, and which one is open. For example, 5 of 12, means that the Space on the screen is the 5th Space alphabetically of the 12 Spaces contained in the Division. Check the Space Name box at the top of the screen to verify that you are working on the correct Space.
2. To work with Spaces within a different Division, you need to close the Space Screen, go back to the Division Screen, and navigate to the Division, which holds the space you wish to work with and then go to the desired Space Screen.

Parts of the Space Screen

Space Name
Name to Use in Reports
Summary of Furniture and Equipment Costs for the Space (Does not include Shelving)
Summary of Assignable Square Feet for the Space (Does not include Collections)
Grand Total Space (Total Assignable and Non-Assignable Space) for Library Model
Grand Total Cost for Furniture and Equipment and Shelving for Library Model
Gray Tabs for Space Detail Information
Alphabetical List of Each Inventory Item in the Space
Delete Space Button
Delete Inventory Item Button
Add Inventory Item Button
Create New Inventory Item Button
View All Items in the Space Button
Space Record Navigation Bar
Create New Supplier Category Button

Close Screen Button

Space Name. This box contains the name of the Space appearing on the screen.

Name to Use in Reports. This feature allows you to rename a Space (e.g., from Literacy Office to Family Literacy Office), to customize the name of a Space (e.g., The John Q. Donor Family Literacy Center Office), or to select a Space that is close in content to a Space you would like to add to the Division. An example of this might be a specialized language tutorial center, like English as a Second Language Tutorial Center, which is not available in the Expert Models. In this case you might select a different Space (e.g., Study/Tutorial Room), customize it and rename it to meet your needs.

The "Name in Reports" will appear in all printed reports and will appear on the Division Screen to the right of the default Space Name.

Summary of Furniture and Equipment Costs for the Space. This box contains a summary of the cost for furniture and equipment (in Red type) in the Space and the assignable square footage required to house the furniture and equipment. The cost does not include the construction cost of the space. The square foot total does not include the non-assignable space.

Model Totals. The red figures in the upper right hand corner are the grand total of space (assignable and non-assignable) and cost (furniture and equipment and shelving) for the library model. These figure are provided in the same location on every screen to track progress as users work on Collections, Divisions and Spaces.

Deleting a Space from the Division

1. From the Division Screen, double click on the Space name and go to the Space screen for the Space you want to delete. Verify that you are on the right screen by checking the Space Name bar at the top of the screen.
2. Click the "Delete Space" button on the lower left hand side of the screen.
3. If you try to delete a Space that has Collections in it, you will get a message saying that you cannot delete the Space. You will need to go to the Collections side of Libris DESIGN and either delete the Collection(s) that are located in the Space or move the Collections to another Space. Then will you be able to come back and delete the Space.
4. There is no undo for delete.

Gray Tabs (Space Detail)

The gray tabs on the Space Screen open folders, containing text or a place to insert text that defines the characteristics of a Space. These are called Space Details. Users add, delete, and edit the text in these Spaces as they customize their Library Models.

1. The “Space Info” Tab is the screen you see when the Space Screen is opened.
2. The “Function” Tab opens a field containing text which describes the function of the Space. This box contains text in the Expert model which can be edited or deleted.
3. The “Occupancy” Tab opens a field containing a summary of the occupants in the space. This information is organized into Reader Seats, Technology Workstations, Staff Workstations, Public Service Desks, and Meeting Room Seats. You will need to add or edit the text here as you customize your building program.
4. The “Relationships” Tab opens a field which provides text indicating preferred adjacencies (spatial relationships) to other Spaces in the Library Model. You will need to add or edit the text here as you customize your building program.
5. The “Collections” Tab opens a blank field which is available to include specific information about the collections housed in the Space, describe special collections, or provide other information about the materials housed in the Space. The box can be left blank and the header will not print in any reports if the box is left empty.
6. The “Special Features” Tab opens a blank field in which the User may provide specific information about the library project such as information about sustainable goals, historic features, or other unique requirements.
7. The “Flexibility” Tab opens a field containing text which identifies the requirements for future growth or potential reorganization for that Space. The User can modify the text in this field, which is included in the Expert Models.
8. The “Fenestration” Tab opens a field containing text which identifies the requirements for windows, natural light, or no windows or natural light for that Space. The User can modify the text in this field, which is included in the Expert Models.
9. The “Finishes” Tab opens a field containing text that identifies the recommendations for floor, wall, ceiling, and other interior finish materials for that Space. The User can modify or add to the text in this field, which is included in the Expert Models.
10. The “Access” Tab opens a field containing text identifying the universal accessibility requirements for the Space, including specific information relating to the Americans with Disabilities Act and the California guidelines for implementation. The User can modify the text in this field, which is included in the Expert Models.
11. The “Acoustics” Tab opens a field containing text identifying the acoustical requirements for the Space. The User can modify the text in this field, which is included in the Expert Models.
12. The “HVAC” Tab opens a field containing text which identifies the heating, ventilation, and air conditioning requirements for that Space. The User can modify the text in this field, which is included in the Expert Models.
13. The “Illumination” Tab opens a field containing text which identifies the specific lighting requirements for that Space. The User can modify the text in this field, which is included in the Expert Models.

14. The “Telecommunications” Tab opens a field containing text which identifies the requirements for telephone and data access in a Space. The User can modify this text, which is available in all Expert models.
15. The “Audio-Visual” Tab opens a field containing text which identifies the media projection, sound amplification, and a/v viewing equipment requirements for the Space. The User can add modify the text in this field, when it is included in the Expert Models.
16. The “Security” Tab opens a field containing text which identifies the security and supervision requirements for the Space. The User can modify the text in this field, which is included in the Expert Models.
17. The “Signage” Tab opens a field containing text which identifies the directional and informational signage requirements for the Space, includes universal access requirements. The User can modify the text in this field, which is included in the Expert Models.
18. The “Electrical” Tab opens a blank field which is available for text which identifies the specific electrical requirements for the Space. The User can enter information in this field which is blank in the Expert Models.

If no text appears under a tab, no heading will appear in the reports for the Division. When Draft Options are available in Reports, Draft One will contain the text in the Functional Activity and Relationships Tabs only. Draft Two will contain Functional Activity, Occupancy, Collections, Relationships, and Special Features. Draft Three will contain the text for all 17 of the space details.

Inventory Items

In the middle of the Space Screen is the Inventory Item section. The Inventory Items for the current Space are shown in alphabetical order. The Inventory Items in the Expert Models can be deleted, new ones added, and quantities increased or decreased as you customize your Library Model. The Inventory Item section contains the following information about each furniture and equipment item in the Space.

Name of the Item. This is assigned on the Expert Side and cannot be changed by the User. Select an item based on the name and the description provided.

Quantity Selected. You can change the quantity by clicking inside the box, highlighting the figure that is already there and replacing it with a different number.

Description of the Item. This physical description of the Inventory Item is assigned on the Expert Side and cannot be changed by the User. Items are described as w (width) x d (depth) x h (height). Many descriptions are longer than the screen will allow. View full descriptions in the Reports.

Square Feet is the actual footprint for an Inventory Item including the space around an object which makes is useable; i.e., space for drawers to open, area for chairs around a table, space to stand, walk around, or aisles between stack sections, depending on what is appropriate for the item. Chairs which sit at a table and equipment which sits on a counter, desk or table, do not have assignable square feet because the space is included in the workstation or table space allowance. Users may change the default square footage for any item by entering a new cost in the override box. (See Overrides Below)

Default Cost. Costs are the prices for furniture and equipment (Inventory Items). Cost figures are based on the average current year's price for an item installed and delivered without taxes or consulting fee. A high, moderate and low cost is available for each Inventory Item. Moderate is the default in all Expert Models. The moderate cost is what an item might typically cost at a reasonable level of quality and durability for a public institution based on the acquisition of more than a single unit. You can change the default cost for any item by entering a new cost in the override box. (See Overrides Below)

Overrides. If you try to override a cost or square footage with a number that is outside of the range for high and low figures, you will get a warning message saying that the number is outside of a suggested range. Review your entry, and click okay to close the error message and keep your number.

Totals for Square Feet and Cost provide the total square feet (or cost) based on the unit price and the quantity selected for each Inventory Item.

Supercategory Assignment. Supercategories are designations linked to an Inventory Item identifying the item as belonging to one of the following categories: Special Purpose, Technology, Staff Workspace, Readers Seats, Meeting Rooms and Collection Shelving (only on the Collections side). Supercategories allow users to sort Inventory Items and shelving units using these designations to fulfill many reporting requirements. Supercategories can be modified by selecting from the Libris DESIGN Supercategories list. Click on the downward facing arrow to the right of the Supercategory to open the pull down pick list of available Supercategories and click on the new selection.

Supplier Category. A supplier category is available for all furniture, equipment, and shelving to enable users to categorize items by source or supplier and compile purchase lists by source. Modify the Supplier Category by selecting from the Libris DESIGN Supplier Categories. Click on the downward facing arrow to the right of the Supplier category to open the pull down pick list of available supplier categories and click on the new selection. You can also create your own Supplier Category. (See Create Supplier Category).

View All Inventory Items in This Space

Clicking this button will open a summary table of all inventory items contained in a space, including quantities, description, total square footage and total cost. This read only table can provide a simplified, useful overview of the contents of a Space.

Adding, Deleting, and Creating New Inventory Items

Deleting an Inventory Item

To remove an Inventory Item from a Space, place the cursor in the box containing the Inventory Item Name. Click on the box that says "Delete Item."

Adding an Inventory Item

If an inventory item does not appear on the Space Screen, you may add it from a pre-selected pull down pick list or from the master Libris DESIGN pick list, or you may create it yourself.

1. Click the Add Item button on the lower right hand corner of the screen. This will put your cursor on the first empty record, where you will be able to add an Inventory Item.
2. To add an item from the Libris DESIGN pick list which has been pre-selected for that Space, click on the downward pointing arrow on the right side of the box, open the pick list and chose an item from the list. You may also type the first characters of an Inventory Item name into the blank box and the pick list will automatically open on or close to the specific item.
3. If you attempt to add an Inventory Item which is already contained in the Space, you will get a *duplicate values* error message which tells you that the item already exists. Hit the escape key (or escape escape) to remove the message. You may now proceed to enter a different Inventory Item in the blank record.
4. After adding the item, enter a number in the quantity field. Review the cost and square footage default numbers and make any adjustments in the override box. (See above for help.) You should also review the Supercategory and Supplier Category assignment at this time. (See above for help.)
5. To save an added inventory item, hit the Enter key or click on the pencil symbol which appears to the left of the Inventory Item Name.

Create New Inventory Item

Occasionally you may wish to add an item that does not appear on the Libris DESIGN pre-selected pick list for that Space. If the item you want to add does not appear on the pull down list, click the "Create New Inventory Item" button. You may either move an item from the master pick list to every Spaces' pick list or you may create your own unique Inventory Item. In either case, the created Inventory Item will now appear on the pick list for every Space in every Division in every Library Model in this copy of Libris DESIGN. To avoid overtaxing the program, you are cautioned to use this feature judiciously.

Adding an Item from the Master pick list

1. Click the button “Create New Inventory Item” on the bottom right hand corner of the screen.
2. Click “View All Inventory Items” to open the pull down pick list containing all 1,679 inventory items in the database. Items can be scanned alphabetically or by using the Control-F command and entering a part of the item’s name.
3. If you locate the item you are looking for, you may elect to add this item to the pick list for your Space. This action will also add the item to the pick list for every Space. Add the item by clicking the button, “Add Item to All Spaces” on the lower left hand side of the screen.
4. To read the full description of an item, place your cursor at the end of the description line and move the cursor throughout the text with the right facing arrow on your keyboard, or hit the End key to go to the end of the description.
5. There is no way to undo this move. Once you have placed an item on the list for every Space, you cannot remove it.

Creating a New Item

If you do not find an item on the master pick list, then you may create it. (You may also do this if your item is on the master list. Creating the new item will allow you to decide in the future to remove the item.)

1. To create the new inventory item, fill in the blank lines on the Create New Inventory Item Screen.
2. Name the item and enter a brief description.
3. Enter a price for the item.
4. Enter a square footage for the item. (Check an item of similar size on the pick list and note what the square footage allocation is. This may provide you some assistance. Remember to leave extra space around the item to make it useable.)
5. Assign a Supercategory and a Supplier category for the new Inventory Item. (If you have difficulty doing this, check a similar item on the pick list and note what the Supercategory/Supplier Category is.)
6. Click the pencil or hit Enter to accept your new Inventory Item and add it to the pick list.
7. Now that the Inventory Item is on the available pick list for that space, you must go back to the Space Screen and follow the procedure to add an item to a space.
8. To delete a user created inventory item, go the “Create Inventory Item” Screen, place the cursor on the Inventory Item Name, and then click on the “Delete Item” button on the bottom of the screen. (You cannot delete the Inventory Item if it appears in any Spaces in your Library Model.)

To exit the Create New Inventory Items Screen you can either click on the “Close Screen” Button to get back to the Space Screen or click on the x in the upper right hand corner.

Buttons on the Space Screen

The Delete Space Button will delete the current Space showing in the Space Name box at the top of the screen. There is no undo for this action.

The Create New Supplier Category button will open an alphabetical listing of Supplier categories. You will be able to customize the list of Supplier categories.

Context sensitive Help is available throughout Libris DESIGN by clicking on the question mark "?" icon on the Libris DESIGN toolbar. The Help screen that appears will relate to the active window. Look for the window with a dark blue title bar relative to the other open windows.

Click the Dictionary button (book icon) on the upper right hand corner of the tool bar for definitions of terms used in Libris DESIGN, descriptions of Inventory Items, and explanations of basic planning assumptions in the database. There is an illustrated version of this Dictionary (Glossary) on the Libris DESIGN website.

To exit the Create New Inventory Items Screen you can either click on the "Close Screen" Button to get back to the Space Screen or click on the x in the upper right hand corner.

Collection Type Screen

Collection Types are the highest-level breakdown of the library's Collections in Libris DESIGN. There are usually three Collection Types associated with every Library Model: Books, Periodicals, and Multimedia. The collection type Multimedia includes all collections that are not books or periodicals such as videotapes, CDs, DVDs, and Books on CD, etc.

The name of the Collection Type you are currently working on displays in the "Collection Type" box along with the name of the Library Model.

Move from one Collection Type to the next by using the record navigation buttons at the bottom of the screen. This will change the name in the Collection Type box.

Parts of the Collection Type Screen

Collection Type Name. The Name for the current Collection Type appears in the Name box. Change or edit the Name at any time by placing the cursor in the box and typing.

Description. The description for the current Collection Type appears in the Description box. Change or edit the description at any time by placing the cursor in the box and typing.

Total cost and square feet. The numbers in blue under the Collection Type description are the total number of volumes on shelf for the Collection Type, the total square footage for the shelving, and the total cost for the shelving.

Model Totals. The blue figures in the upper right hand corner are the grand total of space (assignable and non-assignable) and cost (furniture and equipment and shelving) for the library model. These figures are provided in the same location on every screen to track progress as users work on Collections, Divisions and Spaces.

Delete Collection. To delete any Collection Type (all books, all periodicals, or all multimedia) press the "Delete Collection" in the lower left corner of the Collection Type screen for the Collection Type you wish to delete. There is no undo for delete.

Collection Categories. In the middle of the Collection Type screen is the Categories section. Collection Types are broken down into Collection Categories. This section of the screen shows the Categories in the current Collection Type as well as the Cost and Square Footage for the shelving to house the volumes in each category. Collection Types can be broken down into three categories: Adult/Young Adult, Children/Juvenile or Combined (Adult/Children.)

Adding a Category to the current Collection Type

1. Click on the downward pointing arrow on the right of the first blank box. There will be an asterisk (*) on the left side indicating that you are on a new record.
2. Choose a Category from the list by selecting a Category name and then clicking on it. If you attempt to choose a Category that is already in your current Library Model, you will get a “duplication” error message saying the Category already exists. You can’t have the same Category twice in the same Collection Type. You will need to choose a different Category or press the Escape key to cancel the new record. (Throughout Libris DESIGN, hitting the Escape key will get you out of most messages and delete most changes before they are saved. Sometimes it is necessary to hit Escape/Escape.)
3. Press the Enter key to save your changes or click on the pencil showing to the left of the Categories name where the asterisk (*) was previously.

To work on a Category, click the long vertical “Categories” button on the left side of the list of category names to open the first Category alphabetically or double-click on any specific Category in the list to open the Category screen for that Category.

Deleting a Category

Categories are deleted on the Category Screen. To get to the category screen, follow the instructions above for “To work on a Category.”

Buttons on the Collection Type Screen

Click the “Delete Collection” button to delete the collection named in the Collection Type box. Be very careful when using the "Delete Collection" button. If you delete a Collection Type from your Library Model, there is no way to recover it.

Click the "Allocate Collection" button to go to the Collection Allocation screen.

Context sensitive Help is available throughout Libris DESIGN by clicking on the question mark “?” icon on the Libris DESIGN toolbar. The Help screen that appears will relate to the active window. Look for the window with a dark blue title bar relative to the other open windows.

Click the Dictionary button (book icon) on the upper right hand corner of the tool bar for definitions of terms used in Libris DESIGN, descriptions of Inventory Items, and explanations of basic planning assumptions in the database. There is an illustrated version of this Dictionary (Glossary) on the Libris DESIGN website.

Click the “Close Screen” button to close the Collection Type window. Close any window in Libris DESIGN by clicking the X in the upper right hand corner of the screen. This will either return you to the previous screen in the program hierarchy, or close down the program if you are on the Log in screen.

Category Screen

Each of the three Collection Types is broken down into Collection Categories. The three Categories are: Adult/Young Adult, Children/Juvenile and Combined (Adults/Children). Combined is used when a collection type (like Multimedia) is not split between the adult and children's areas, but shelved all together in one location.

Open the Category screen from the Collection Type window by clicking the long vertical Category button on the left hand side of the Categories list; the name displayed in the Category Name box will be the first Category in alphabetical order of all the Categories in your library. To open a specific Collection Category double-click on the Category name from the list of Categories.

To work on a different Collection Category, click on the Record Navigation buttons at the bottom of the screen. This will change the name in the Category Name box and show you the next Category that is linked to the Collection Type you are working in. The number to the right of the navigation arrow will tell you how many Categories there are in total.

To work on a different Collection Category, in a different Collection Type, (e.g., Books instead of Periodicals, etc.), you must:

1. Exit the Collection Category Screen.
2. Return to the Collection Type Screen.
3. Use the navigation buttons on the Collection Type screen until you get to the Collection Type Screen for that specific Type,
4. Double click on a Collection Category Name on that screen.

Parts of the Collection Category Screen

Category Name
Model Totals
Category Total for Volumes on Shelf
Category Total for Shelving Cost
Category Totals for Assignable Square Feet
Subcategories
Subcategory Totals for Shelving Cost
Subcategory Totals for Assignable Square Feet
Delete Category Button
Close Screen Button

Category Name. This box displays the current Category. This name is set on the Expert side and cannot be changed by a user.

Summary Figures. The box just below the Category Name contains a summary of the cost for shelving units (in blue) and the square footage required to house the shelving for this Collection Category. The cost does not include the construction cost of the space or the cost of the actual collections. The square footage total does not include the non-assignable space.

Model Totals. The blue figures in the upper right hand corner are the grand total of space (assignable and non-assignable) and cost (furniture and equipment and shelving) for the library model. These figures are provided in the same location on every screen to track progress as users work on Collections, Divisions and Spaces.

Subcategories. The Subcategories section is in the middle of the Collection Category Screen. Each Category can consist of one or more Subcategories. This section of the screen shows a list of the Subcategories in alphabetical order. It includes the cost and square footage for the shelving units (in red type) for each Subcategory. The cost does not include the construction cost of the Space or the cost of the actual collections. The square footage total does not include the non-assignable space. Subcategories are named on the Expert Side and cannot be changed by a user.

Adding a Collection Subcategory

1. Scroll down to the end of the list of Subcategories List using the scroll bar on the right until you are at the first blank line. You will see an asterisk (*) on the left side of the blank line. (Throughout the program this asterisk will be your indication that you are on a new record.)
2. Click on the downward pointing arrow on the right of the first blank box to open the pull-down or pick list to see all of the available Subcategories. (Throughout the program, clicking on the downward pointing arrow will open pull-down or pick lists.)
3. Choose a Subcategory from the list by selecting a Subcategory name and then clicking on it. If you attempt to choose a Subcategory that is already in your current Collection Category, you will get a "duplication" error and will need to choose a different Subcategory. If you get stuck in the error message, press the Escape key once. (Throughout the program hitting the Escape key will get you out of many error messages. If you are still stuck in the error message, press the Escape key again – twice should do it.)
4. To save your new Subcategory, hit the Enter key or click on the pencil symbol to the left of the Category name box. (Throughout the program you may change your mind about changes before they have been saved, by hitting the Escape key.)

Error Message. If you attempt to add a Subcategory that is associated with a specific Space (Default Space Assignment) and that Space does not exist in the current Library Model, you will get this error message: "This subcategory cannot be added because the Space is not present in the model." <u>You cannot add a Collection Subcategory without including the space to house it.</u>

To complete the process you will need to add that Space (in the correct Division) in your Library Model or change the assigned space for the Subcategory to a Space that does exist in the Library Model.

To change the assigned space locate the "Assigned Space" box under the name of the Subcategory on the Category screen. Click the right hand arrow next to the default space in the box, open the pull-down pick list, and choose a Space that is in your model.

Adding the Assigned Space to Your Model

1. Close the Category Screen.
2. Close the Collection Type Screen.
3. Return to the Library Model Screen
4. Select the Division where the Space is assigned
5. Follow the procedure for adding a Space. (See Help for Division Screen)
6. Return to the Category Screen and add the Collection Subcategory.

Working on a Collection Subcategory

1. Click the long vertical "Subcategories" button to the left of the list of Subcategory names to open the Subcategory Screen for the first Subcategory alphabetically on the list, or
2. Double click on a Subcategory name in the list and go directly to the Subcategory Screen for that Subcategory.

Deleting a Collection Subcategory

1. This is done on the Subcategory Screen.

Buttons on the Collections Category Screen

Click the "Delete Category" button to delete the Category named in the Category Name box. Make sure that you are on the right screen by checking the Category Name bar at the top of the screen. There is no undo for delete.

Context sensitive Help is available throughout Libris DESIGN by clicking on the question mark "?" icon on the Libris DESIGN toolbar. The Help screen that appears will relate to the active window. Look for the window with a dark blue title bar relative to the other open windows.

Click the Dictionary button (book icon) on the upper right hand corner of the tool bar for definitions of terms used in Libris DESIGN, descriptions of Inventory Items, and explanations of basic planning assumptions in the database. There is an illustrated version of this Dictionary (Glossary) on the Libris DESIGN website.

Click the "Close Screen" button to close the Collection Category window. Close any window in Libris DESIGN by clicking the X in the upper right hand corner of the screen. This will either return you to the previous screen in the program hierarchy, or close down the program if you are on the Log in screen.

Subcategory Screen

The Subcategory Screen provides an overview of the content, cost and square footage for each Collection Subcategory. It also provides the detail about the physical collections in your Library Model including the names of the individual Collection Volume Types and detailed information about the default location, the shelving, and the cost and square footage for each Collection Volume Type. This screen is where you will physically manage the housing of your volumes. (You will manage the overview of your total collections including holdings on the Collection Allocation Screen.)

Getting to a Collection Subcategory Screen

Click the long vertical Subcategory button on the Category window, the name displayed in the Subcategory Name box is the first Subcategory in alphabetical order of all the Subcategories in the current Category, or

Double click on a Subcategory name from the list of Subcategories to open a specific Subcategory screen.

Once you are on a Subcategory Screen, you will use the record navigation buttons at the bottom of the screen to open other Subcategories within the same Collection Category.

To work on Subcategories within another Category, you will have to close down the Subcategory Screen, and use the record navigation buttons to open another Collection Category.

Working on a Subcategory in another Collection Type

1. Close down the Subcategory Screen.
2. Close down the Category Screen.
3. Use the record navigation buttons on the bottom of the Collection Type Screen to open that Collection Type.
4. Open the Category Screen.
5. Open the Subcategory Screen.

Parts of the Subcategory Screen

Subcategory Name
Assigned Space
Model Totals
Subcategory Summary
Collection Volume Types Detail
Add Volume Button

Delete Volume Types Button
Delete Subcategory Button
Create Volume Type Button
Create Shelving Type Button

Subcategory Name. This box displays the name of the current Subcategory that appears on the screen. This name is assigned on the expert side and cannot be changed by a user.

Model Totals. The blue figures in the upper right hand corner are the grand total of space (assignable and non-assignable) and cost (furniture and equipment and shelving) for the library model. These figures are provided in the same location on every screen to track progress as users work on Collections, Divisions and Spaces.

Assigned Space. This is the Space in the Library Model that the Collection Subcategory is housed in. You can change this by selecting a different space. Click on the right hand arrow next to the Assigned Space Box and open the pull-down pick list. Choose another Space from the pick list and make the change by hitting the Enter Key or Clicking the pencil symbol on the left hand side of the Subcategory Screen.

If the Space you select is not in your Library Model, you will get this error message: "The space assignment cannot be changed to the Space selected because the Space is not present in the physical model." You cannot add a Collection Volume Type without including the space to house it.

To complete the process you will need to add that Space (in the correct Division) in your Library Model or change the assigned space for the Collection Volume Type to a Space that does exist in the Library Model.

Adding the Space to your model

1. Close the Category Screen.
2. Close the Collection Type Screen.
3. Return to the Library Model Screen.
4. Select the Division where the Space is assigned.
5. Follow the procedure for adding a Space. (See Help for Division Screen)

Subcategory Summary. In the box just below the Assigned Space are summary figures (in blue) for the total number of Volumes, Volumes on the shelf, Shelving cost, and the Square Footage of all the shelving units that hold the Collection Volumes in the Subcategory.

Collection Volumes and Shelving Section. In the middle of the Subcategory Screen is the Volumes and Shelving detail section. Each Collection Subcategory consists of one or more Collection Volumes. This section of the screen shows a list of the Collection Volumes in alphabetical order.

Detail for Collection Volume Types

1. Number of Holdings. This is the number of physical volumes in the planned collection.
2. Number of Volumes on the Shelf. This number is automatically calculated based on circulation rate, which is entered on the Collection Allocation Screen. This is the figure that Libris DESIGN uses to calculate the shelving requirements.
3. Shelving Type. This is the default shelving type from the Expert Model and can be changed.
4. Physical Description of the Shelving Type. Single line description of the specific shelving type found under the Shelving Type Name. This cannot be modified or deleted.
5. Per Unit Cost of Shelving. This is the default shelving cost per unit based on high, moderate, or low, whichever has been selected, and based on an assembly (end panels, canopy tops, etc.), which is described in the Dictionary (Glossary). (End panels, canopy tops, etc.)
6. Per Unit Square Footage for the Shelving Units. This is the default square footage allocation per shelving unit based on the shelving space allocation, which can be found in the Dictionary.
7. Totals. These numbers are the total cost and square footage of the shelving, which will house the collection volumes.
8. Number of Shelving Units. This is automatically calculated based on the Holdings, Collection Type, and number of Collection Volumes per linear foot of shelf.
9. Number of Volumes per Shelving Units. This is automatically calculated based on the Holdings, Collection Type, and number of Collection Volumes per linear foot of shelf.
10. Number of Volumes per Linear Foot. This is a default number for the number of volumes that will physically fit on a shelf leaving approximately 25% available for future growth.

Editing A Collection Volume (Darker Pink Box)

1. Change the quantity of volumes by clicking inside the white “Holdings” box, highlighting the figure that is there and replacing it. This can also be done on the Collection Allocation Screen. In either case when you change the holdings for a Collection Volume you will need to adjust the Total Holdings on the Collection Allocation Screen. The number of Volumes on the shelf will change automatically, based on the circulation rate, when the Holdings number is changed.

Changing the Shelving Type

1. Change the default shelving unit selected to house a Collection Volume Type by clicking on the downward pointing arrow at the end of the shelving box and

selecting a different type of shelving from the pull-down pick list. If you do not find the shelving unit you are looking for, proceed to the Create New Shelving Type screen.

Default Overrides

On the right side of the Collection Volume section of the screen are three opportunities to review and override default numbers.

1. Override the default volumes per linear foot on a shelf for the collection volume by clicking in the “Override Vols/LF” white box and typing in a new figure. You will get an error message if your change is above or below the high or low for that Collection volume. Click okay, enter or hit the pencil symbol to accept the change and override the default number. This will recalculate how many shelving units are needed. The number of shelving units required and the number of Volumes per Shelving Unit is shown in purple to the right of the shelving.
2. Override the shelving unit’s default cost or square footage shown as dark red figures by entering new numbers in the white boxes to the right of the word “Override.” You will get an error message if your change is above or below the high or low for that Shelving Type. Click okay, enter or hit the pencil symbol to accept the change and override the default number. The cost and square footage totals for shelving to house the Volumes will be recalculated on the new square footage per unit and cost per shelving unit.

Adding A Collection Volume Type

1. Click the "Add Volume" button in the lower right hand corner of the screen just above the “Close Screen” button.
2. Click on the downward pointing arrow at the end of the box your cursor is in and choose a Collection Volume Type from the list. If you attempt to choose a Volume that is already in your current Subcategory, you will get a “duplication” error message saying the Volume already exists. You can’t have the same Volume twice in the same Subcategory. You will notice that when you add a Volume, Libris Design automatically provides you with a default shelving unit and default volume per linear foot figure.
3. If you know the name of the Volume you want to add, type the first few letters to move the Volume list quickly to that part of the alphabet.
4. If you try to add a Volume that is not in Libris DESIGN you will get an error message. You may add new Collection Volume Types to Libris DESIGN by clicking the “Create New Volume Types” button. Help is available on the “Create New Volumes Type” Screen.
5. Enter the number of Volumes you want to add in the “Holdings” box. Review the default Shelving Type, volumes per linear foot for the Collection Volume Type, cost and square footage.

6. To save your new Collection Volume Type, hit Enter or click on the pencil symbol to the left of the Collection Volume Type in the name box. (Throughout the program you may change your mind about changes by hitting the Escape key before they are saved.)
7. Error Message. Changing the Holdings for a Collection Volume Type on the Subcategory screen will trigger an error message, which provides a gentle reminder that the sum of your Collection Volume Types no longer matches your projected Total Holdings on the Collection Allocation screen. You may correct this at any time, but you will continue to get the error message when you close a Collections screen until it is fixed.
8. To change the defaults for shelving, cost, or volumes per linear foot for the added Collection Volume Type, edit the Collection Volume Type after you have saved the record. (See above for help with editing Collection Volume Types, Shelving Types, and Overriding defaults.)

Create New Volume Types

If you do not find a Collection Volume Type that you are looking for in the pull down pick list, click on the “Create New Volume Types” button and follow the instructions for that screen. (See Below)

Create New Shelving Types

If you do not find a Shelving Type that you are looking for on the pull down pick list for a Collection Volume Type, click on the “Create New Shelving Types” button and follow the help instructions for that screen. (See Below)

Buttons on the Subcategory Screen

Delete a Collection Volume Type. Click on the gray bar next to the Volume Name you want to delete, and click the "Delete Volume" button that appears just underneath the last Collection Volume Type. The “Delete Subcategory” button is immediately below this button. Use caution here, since there is no undo for delete.

Delete a Subcategory. Click the “Delete Subcategory” button to delete the entire Subcategory showing in the Subcategory Name box. Use caution here, since there is no undo for delete.

Click on the “Create New Shelving Types” button to create a new Shelving Type if you are not finding what you want in Libris Design’s list of Shelving.

Click on the “Create New Volume Types” to create a new Collection Volume Type if you are not finding what you want in Libris Design’s list of Volumes.

Context sensitive Help is available throughout Libris DESIGN by clicking on the question mark "?" icon on the Libris DESIGN toolbar. The Help screen that appears will relate to the active window. Look for the window with a dark blue title bar relative to the other open windows.

Click the Dictionary button (book icon) on the upper right hand corner of the tool bar for definitions of terms used in Libris DESIGN, descriptions of Inventory Items, and explanations of basic planning assumptions in the database. There is an illustrated version of this Dictionary (Glossary) on the Libris DESIGN website.

Click the "Close Screen" button to close the Collection Subcategory window. Close any window in Libris DESIGN by clicking the X in the upper right hand corner of the screen. This will either return you to the previous screen in the program hierarchy, or close down the program if you are on the Log in screen.

Create New Volume Type

If you do not find a specific Collection Volume Type that you are looking for, click the "Create New Volume Types" button to open the Create New Volume Types screen.

The Create New Volume Types Screen allows you to create an entirely new Volume type for your use in Libris DESIGN. This new Volume Type will show up in the list of Volumes in all Libris DESIGN models. You can use this box to create Volumes that do not already exist in Libris DESIGN, and Volumes that do exist but you prefer to call them by a different name or they are assigned to a different Subcategory. You can also use this screen to move a Volume Type to the pick list for a Collection Subcategory, if it is unavailable on the pick list for that Subcategory.

There are two ways to create a new volume type: you can "borrow" the Volume Type from another Subcategory or you can create your own Volume Type.

Move a Volume Type to your pull down pick list when it is available in the Master List of Volume Types.

1. Open the "Create New Volume Type Screen."
2. Click on "View all Volume Types." This will open a pull-down pick list for all of the Volume Types in all of the Subcategories of all of the Categories of the program. Use the scroll bar on the right hand side of the list to view all of the Volume Types on the list sorted alphabetically.
3. Click on the gray box to the left of the Volume Type name to make your selection. Make sure that your are picking a Volume Type from the same Collection Type (Book, Periodical, or Multi-media) or Libris DESIGN will not be able to produce accurate collection allocation reports.
4. Click on "Add Volume Type to All Subcategories" to make this change.
5. This Volume Type will now appear on the pick list for the Subcategory your are working on (and all other Collection Subcategories.) There is no undo for this action. You can edit the default shelving and volumes per linear foot after you have added the Volume Type to your Subcategory.
6. Return to the Subcategory Screen and follow the procedure for "Add New Volume Type". Make any changes to the defaults (shelving type, etc.) and save the record.
7. If you do not find a Volume Type, follow the instructions below for "Create New Volume Types."

Creating a new Volume Type when there is no equivalent Volume Type available in the database.

1. Click the "Add Volume" button
2. Enter a name for your Volume in the Volume box.
3. Choose default shelving for your Volume by clicking on the down pointing arrow at the end of the Default Shelving box and selecting from the list.

4. Enter the number of Volumes per linear foot for your Volume type in the "Vols/LF" box. If you can't make this calculation, copy the volumes per linear foot number from a similar Volume Type.
5. To save your changes, press enter or hit the Escape Key if you change your mind before your changes have been saved.
6. If you do not see the Shelving Type you want to use for your Volume Type, click the "Create New Shelving Types" button. Once you create the new Shelving Type, it will appear on the list of available shelving. (See Below)
7. The Volume Type will not be added to your Subcategory until you go back to the Subcategory screen and follow the procedure for "Add Volume ". (See Help on the Subcategory Screen.)
8. The new Volume Type will appear on the pick list for this Subcategory and for all Subcategories in all Library Models in the program.

Buttons on the Create New Volume Type Screen

"Delete Volume". Click on the gray square to the left of the Volume description (for a New Volume Type you have added) to select it and click the "Delete Volume" button in the bottom left hand corner of the window. Make sure you are on the correct volume type, indicated by the right facing arrow on the left hand side of the record. This will delete this Volume Type from the Universal pick list. However, if you have placed this Volume Type in any of your Library Models, you will not be able to delete it until it has been deleted from all locations. There is no undo for delete, but you can easily recreate a new volume type if necessary.

Click the "Create New Shelving Types" Button to create a new Shelving type if you are not finding what you want in the Libris DESIGN list of Shelving. (See Below)

Click the "Add Volume" button to go to the next available blank record in the Create Volume Type List.

Context sensitive Help is available throughout Libris DESIGN by clicking on the question mark "?" icon on the Libris DESIGN toolbar. The Help screen that appears will relate to the active window. Look for the window with a dark blue title bar relative to the other open windows.

Click the Dictionary button (book icon) on the upper right hand corner of the tool bar for definitions of terms used in Libris DESIGN, descriptions of Inventory Items, and explanations of basic planning assumptions in the database. There is an illustrated version of this Dictionary (Glossary) on the Libris DESIGN website.

Click the "Close Screen" button to close the Create new Volume Type window. Close any window in Libris DESIGN by clicking the X in the upper right hand corner of the screen. This will either return you to the previous screen in the program hierarchy, or close down the program if you are on the Log in screen.

Create New Shelving Type

If you do not find the specific Shelving Type that you are looking for, click the "Create New Shelving Types" button to open the Create New Shelving Types screen.

The Create New Shelving Types Screen allows you to create an entirely new shelving type for your use in Libris DESIGN. This new shelving type will show up in the list of Shelving in all Libris DESIGN models.

To create new shelving units enter information in the following fields. When you finish entering information into each box, click on the pencil icon in the left hand gray bar to save your new Shelving unit or hit the Enter key. Each record in the Shelving Types screen consists of two lines. Each box must be completed. If you are unable to estimate any of the information that is required, such as the square feet per unit, check the specifications for a similar unit already in the database.

1. Shelving Name: Enter a name for your Shelving. This name will appear in the Shelving list in ALL Libris Design models. Try to be consistent with the other names which start with the aisle width for standard book shelving and with the name of the media to be housed for specialty shelving units.
2. Facing: Click the down pointing arrow in the Facing box and choose either SF for single-faced or DF for double-faced shelving.
3. Height: Enter the height of the shelving unit in inches
4. Shelf Width: Enter the width (or length) of each shelf on the shelving unit in feet. You may enter decimals in this field if necessary.
5. # of Shelves: Enter the number of shelves for this type of shelving unit. Remember to double the number of shelves for double faced units.
6. SqFt/Unit: Enter the net square footage for this type of shelving unit. (If you have difficulty doing this, check a unit of similar size on the pick list and note what the square footage allocation is. This may provide you some assistance. Remember to leave extra space around the shelving to make it accessible.)
7. Cost/Shelving Unit: Enter a cost for this shelving unit.
8. Description: Enter a description of the Shelving unit. Follow the format for other shelving units to maintain consistency in the database and reports.
9. Supplier Category: Select "Shelving" for the Supplier Category.

If you attempt to enter incomplete information or illegal information (text where there should be numbers), you will get an error message letting you know you must correct the information. You cannot close the box until all of the items are completed.

If you change your mind about adding a shelving unit in the process of adding one, press the Escape key on your keyboard. This will erase your entry and stop the error messages.

Deleting a Shelving Unit

Click on the gray bar next to the Shelving you want to delete, and click the "Delete Shelving" button in the lower left hand corner of the screen.

Buttons on the Create New Shelving Units Screen

Click the "Delete Shelving" button to delete a shelving type that you have created. This button will delete the shelving type that is the current record. The right facing arrow to the left of a record designates the current record. If you have assigned this shelving type to a Volume Type in one of your user models, you will not be able to delete it.

Click the "Add Shelving" button to create another new shelving type.

Click the "Close Screen" button to close the Create New Shelving Type window. Close any window in Libris DESIGN by clicking the X in the upper right hand corner of the screen. This will either return you to the previous screen in the program hierarchy, or close down the program if you are on the Log in screen.

Context sensitive Help is available throughout Libris DESIGN by clicking on the question mark "?" icon on the Libris DESIGN toolbar. The Help screen that appears will relate to the active window. Look for the window with a dark blue title bar relative to the other open windows.

Click the Dictionary button (book icon) on the upper right hand corner of the tool bar for definitions of terms used in Libris DESIGN, descriptions of Inventory Items, and explanations of basic planning assumptions in the database. There is an illustrated version of this Dictionary (Glossary) on the Libris DESIGN website.

Click the "Close Screen" button to close the Create New Shelving Type window. Close any window in Libris DESIGN by clicking the X in the upper right hand corner of the screen. This will either return you to the previous screen in the program hierarchy, or close down the program if you are on the Log in screen.

Collection Allocation Screen

The Collection Allocation Screen is where you will manage the overview of collections including projected Total Holdings, Target Holdings by Collection Category, and Circulation percentage by Collection Volume, which will allow you to see the number of volumes that will be on your library shelves. The Collection Subcategory screen is where you manage the physical aspects of housing your collections, including the addition and deletion of Volume Types, shelving, square footage requirements, and cost of shelving. You cannot add or delete Subcategories or Collection Volume Types on the Collection Allocation screen.

There is a separate Collection Allocation Screen or Screens for each Collection Type. These are accessed by clicking on the “Allocate Collection” button found on the bottom of the Collection Type Screen. Always check the Collection Type name in the upper box to make sure that you are on the Collection Type screen for the collection you wish to work on.

Each Collection Allocation Screen is divided by Collection Category, so there will be separate summary screens for Adult/Young Adult and Children/Juvenile, and for Combined, if that is a Category you are using. To view these different screens use the record navigation button at the bottom of the screen. These will tell you how many Category screens are available for that Collection Type. (1 of 3, etc.)

Parts of the Screen

Name. The name of the Collection Type (Book, Periodicals, Multimedia) and Library Model appear at the top of the screen.

Category. The Collection Category (Adult/Young Adult, Children/Juvenile, or Combined) will appear immediately below the Collection Type and Model Name.

Total Collection Holdings. Total Target and Total Actual. The number in the white box is the Total Holdings planned for the Library Model for this specific Collection Type (known as the Target). This number includes all Categories of the Collection Type. The user can change this number, which is provided with the expert model, by clicking in the box and entering a new number. The Total Actual Holdings shows the number of Holdings currently in the Library Model. When the Total Target Holdings and the Total Actual Holdings figures match then both lines will read 100%.

Total Collection On Shelf. The black number to the right of the Holdings box is the number of volumes for this Collection Type that will be on the shelf based on the circulation rates on the Collection Allocation summary chart. This is a view only number.

Category Target and Actual: The number in the white box is the Target Holdings planned for a specific Collection Category of this Collection Type. The total of the target numbers for all Collection Categories must match the total holdings for the Collection Type. For example, if you have two categories in this collection, (Adult/Young Adult and Children/Juvenile) the target numbers of the two different categories must match the total holdings for the Collection Type. The user can change target numbers by clicking in the white box and entering a new number.

Actual "On Shelf." The Actual "On Shelf" number to the far right is the total number of volumes on the shelf for this Collection Category and Type (minus those in circulation). This is a view only number indicating what is currently in the Library Model.

Percent. Throughout the Collection Allocation Screen, the program will automatically calculate percentages for the user. At the top of the screen, the program will calculate what percentage of the total "Holdings" each category represents both for the target number and for the actual number.

Subcategory. This column contains the name of the Subcategory where a specific Volume Type can be located.

Volume Name. This column contains the name of the Volume Types included in this Library Model for this Collection Type and Collection Category.

Percent of Total Holdings. This column (black type in a purple box) represents what percentage of the total "Holdings" (for the whole Collection Type) each Volume Type represents. This number is automatically generated by Libris DESIGN and cannot be changed by a user.

Number of Holdings. This column (black type in a white box) represents the projected holdings for a specific Volume Type. Changes made in this box are automatically transferred to the pink Collection Subcategory screen for this Volume Type.

Percent of Volumes in Circulation. The numbers in this column (black type in a white box) represent what percent of any given Volume Type can be expected to be in circulation. This number allows the program to calculate the number of volumes that will be on the shelf or not checked out. You can change these percentages. As the percentage of Volumes in Circulation is increased, the number of shelving units, space and associated costs will decrease.

Number of Volumes on Shelf. This column (black type in a purple box) represents the number of volumes which will be on the library shelves based on the Percent of Volumes in Circulation entered in the box to the left. This number is automatically generated by Libris DESIGN and cannot be changed by a user. Changes which appear in these figures are automatically transferred to the pink Collection Subcategory screen for this Volume Type.

Using the Collection Allocation Screen

1. Before using the Collection Allocation Screen for a specific Collection Type, you should have your Collection Development plan completed.
2. Collections in the Expert model which do not belong in your Library Model Screen must be deleted on the (Pink) Collection Subcategory Screen. Collections cannot be added or deleted on the Collection Allocation Screen.
3. Collections which belong in your Library Model that are not included in the Expert Model, must be added on the Collection Subcategory screen.
4. Begin working with the Collection Allocation Screen by Entering the Total Collection “Holdings” for this Collection Type. (For example, if you plan on 100,000 book volumes for your library, change the number in the “Holdings” box to 100,000). Click Enter to record the change.
5. At this point, some of the numbers will change. These numbers reflect how the total of the individual volumes listed on the summary screen relate to the projected total holdings. As you work your way down the screen, you’ll fix these numbers or they will automatically change as the program recalculates percentages. If you close the screen after changing the “Holdings” and nothing else, you will get an error message that the Number of Holdings does not match the Total Holdings. You may click okay to close the message and fix the number of holdings when you are ready to do so.
6. After you have entered the Holdings, you will need to enter the Holdings by Collection Category (Adult/Young Adult, Children’s and Combined). You will know from your collection development plan that you want a certain number of volumes in one category and a certain number in another. Enter the target number in the box (e.g., 80,000 volumes for Adult book volumes) and hit enter to record the change. Use the record navigation button to open the screens for the other Collection Categories and enter the target numbers here as well. The sum of the targets for each Category should match the Collection Target total.
7. You will still have the error message if you close the screen now since the number of holdings of individual Volume Types still will not match the target or the total “Holdings” number.
8. Work your way down the list of Volume Names and enter the target (projected) holdings for each Volume Type in the column labeled “Number of Holdings.” Click the pencil symbol on the left hand side of the list or hit the Enter key to record each entry.
9. When you have finished working with the Volume Types in one Category, use the record navigation button to open the other Category screen (or screens) and enter the number of holdings for each of these Volume Types.
10. When you have finished this process, the “Target” and “Actual” numbers at the top of each screen should match, and the black numbers to the left of the Holdings box should say 100%. Use the record navigation buttons to go from one screen to the next to view all of the changes.
11. You may close the Collection Allocation Screen at any time and return later to finish the process. Clicking okay will close the error message. You will continue

to get an error message until your Number of Holdings and Total Holdings match (100%).

Deleting a Volume Type

1. Return to the Collection Subcategory screen that contains that Volume Type.
2. Follow the Help instructions for the Subcategory Screen.

Changing the Holdings for a Volume Type

1. Click in the "Holdings" box at the top of the screen and change the total Holdings to include the increased number.
2. Click in the "Target Holding" box and change the target holdings box to include the increased holdings for the Collection Category.
3. Click in the "Number of Holdings" box and change the holdings for the specific Volume Type.
4. Perform steps 1 through 3 above in this order or in reverse order.

Changing the Percentage in Circulation

1. Click in the "Percentage in Circulation" box for the Volume Type and change the percentage number by entering the percentage figure in the format as indicated on the screen.

Changing the Percentage or balance of the collection by Collection Category

1. Click in the "Target Holdings" box and enter a new number on each of the Collection Category Screens. These new numbers should total the number in the "Holdings" box at the top of the screen.
2. The "Holdings" for each Volume Type will have to be adjusted to make the "Target" Holdings match the "Actual" Holdings.
3. Steps one and two above can be performed in reverse order and the Volume Type holdings can be changed first, then return to the Target Holdings box to change the "Target" holdings number to match the "Actual" Holdings number. In either case the Percent of Total Holdings must equal 100% when you are finished.

Working on the Collection Allocation Screen for a different Collection Type

1. Close the Collection Allocation Screen.
2. Use the record navigation buttons on the bottom of the Collection Type screen until the new Collection Type is shown on the screen.
3. Click on the "Allocate Collection" button and proceed as above.

Context sensitive Help is available throughout Libris DESIGN by clicking on the question mark “?” icon on the Libris DESIGN toolbar. The Help screen that appears will relate to the active window. Look for the window with a dark blue title bar relative to the other open windows.

Click the Dictionary button (book icon) on the upper right hand corner of the tool bar for definitions of terms used in Libris DESIGN, descriptions of Inventory Items, and explanations of basic planning assumptions in the database. There is an illustrated version of this Dictionary (Glossary) on the Libris DESIGN website.

Click the “Close Screen” button to close the Collection Allocation window. Close any window in Libris DESIGN by clicking the X in the upper right hand corner of the screen. This will either return you to the previous screen in the program hierarchy, or close down the program if you are on the Log in screen.

Budget Screen

Detailed Help is also available on the Budget Screen.

Overview

Black Figures in White Boxes. The black figures in white boxes are the figures used in the project budget calculations. These figures are either percentages of the construction contract total, dollar per square foot figures ($/SF) or lump sum figures derived from a budget calculation. You may change any of the figures at any time by typing a new figure into the white box.

Purple Figures. The purple figures are view only figures. They represent the figures generated in the user model which you created or built in the Pop-Up Boxes, but are not being used in any calculation until you transfer them to the white boxes. Selecting "Apply User Values" at the bottom left hand corner of the screen will transfer the purple figures to the white boxes, making them the figures used in calculations.

Default Numbers. The default figures are based on moderate statewide costs for public library construction based on recently constructed public library facilities in California. The default figures (black figures in white boxes when the budget is first opened) can be reapplied at any time by clicking the "Restore Defaults" button. For each line item, you have the option of using the default number, the purple (user generated) number, or another figure for any line item by manually entering that figure into the white box.

$/SF & Lump Sum Figures. Many of the fields in the budget screen have both a "$/SF" and "Lump Sum" component. Both of these appear in a white box with the lump sum in the right hand white box and the $/SF or percentage used for calculation in the left hand white box. Calculations are based by applying the cost per square foot to the square footage in the "Building SqFT Used for Calculation" box in the upper right hand corner of the screen, or the percentage (%) figure against the Construction Contract Total near the top of the screen.

Buttons. All "buttons" on the budget screen appear as raised gray boxes with black lettering. There are two kinds of buttons available. Buttons activate either a pop-up box for a specific line items and buttons with a question mark open a Help Box describing the specific line item and its default setting and explaining user options for changing the defaults for that line item.

Navigation. Navigate through the Budget Screen from one box to the next by pressing the Tab Key or relocating the cursor.

Multiple Budgets. Multiple budgets can be created from the Project Cost Estimate (Budget) screen. See "Copy Budget" below for Instructions on creating multiple budgets.

Changing Default Figures

1. You may change per square foot figures, percentages, or lump sum totals figures by entering a different figure in the white box. Click in the box you want to change, type in a new number and hit enter.
2. Changing the lump sum figure will automatically recalculate the $/SF figure or percentage to the left. Changing the $/SF figure or percentage will automatically recalculate the lump sum figure to the right.

Pop-Up Boxes

1. Pop-up boxes allow users to add another level of detail to the cost estimate by entering costs for individual line items in a specific budget category. Lump sum figures can be added to these line items to build a specific purple number for a specific budget category.
2. Purple numbers are not used in calculations until “Apply User Values” is selected at the bottom left hand corner of the screen. This action automatically transfers all purple numbers to the white (active) box.
3. Line items in the pop-up boxes may be left blank or deleted by clicking on the gray square to the left of the line item and pressing the “Delete” button in the lower left hand corner of the pop-up box screen.
4. New line items may be added by clicking in the first blank row (with an asterisk showing on the left hand side) and typing in the name of the line item. After entering a cost figure, pressing the Enter key will save the line item.
5. The Total cost of the line items appears automatically in the lower right hand corner of the pop-up box.
6. Select the “Close Screen” button to exit the pop-up box.

Pop-Up Box Help

Help is available for each budget category on the screen by selecting the gray button with the question mark. These boxes provide a description of the category, explanation of the default, and instructions on changing the default or building a detailed cost figure using the pop-up boxes.

Parts of the Budget Screen

Budget Screen Header

Name. Each budget must be given a name. You will give each budget a distinguishing name when the budget is first opened. This can be edited or changed at any time.

Description. The description text is used to explain the differences when multiple cost estimates are created. The text in the description box is not limited by the size of the box on the screen.

Total Square Footage from the Libris DESIGN Model. The purple figure is the total size of the user model created using Libris DESIGN. The purple number is not used for calculation until the user selects “Apply User Values.”

The Help box ? on the left hand side of each line item provides a description of the budget category, explains the default cost, and provides instruction on overriding the default figure or building a more specific line item budget using the pop-up box.

Building Sq. Ft. Used for Calculation.

1. The default number when the budget is opened is the size of the Expert model selected.
2. This number will match the Total Square Footage from the Libris DESIGN Model for the Expert Model selected before you have started to work on the model.
3. The square feet used for calculation will not match the user model until you click on “Apply User Values”.
4. Once the purple number is transferred into the white box, it is used for all cost calculations in the budget screen.
5. A does not equal sign will appear in the upper right hand corner of the screen in a red box if the number being used for the calculations does not match the number from the Libris DESIGN User model. (See #3 Above)

Expansion and Remodeling. Budgets for Expansion and Remodeling projects require you to enter the amount of square footage for the new construction and the amount of square footage for remodeling separately.

Project Cost Estimate Total. The cost per square foot and total project cost based on all of the budget calculations in the Budget Screen appear in red on the lower right hand corner of the screen.

Areas.   The Statewide area may be changed to Metropolitan or Rural to adjust the cost figures accordingly. New default numbers ($/SF) will appear in the white boxes. These have been adjusted for regional variation in construction costs.

Cost Level. The cost level may be changed from moderate to high or low. New default numbers ($/SF) will appear in the white boxes.

Recalculate Cost Basis

The initial default settings for costs are for Moderate Statewide cost levels for California. You should evaluate if your specific project falls into these categories before proceeding with the remainder of the budget screen. You may change these:

1. By clicking on the downward pointing arrow to the right of the white box to obtain a pull down list of options.
2. Highlighting with the cursor and clicking on it will select an option and change the cost basis for all calculations.
3. To activate changes, select the gray “Apply Cost/Area Changes” button.
4. The area or cost recalculations will replace user values (purple numbers) in the active calculation boxes (white boxes) with default numbers at the new cost basis. To replace the purple numbers, select “Apply User Values” at the bottom left hand corner of the screen.

Buttons on the Budget Screen

“Apply User Values.” Selecting this button automatically transfers all purple numbers (from the Libris DESIGN User Model or generated by the user in the Pop-Up box by entering detailed line items) into the white box. Once transferred these are the numbers that will be used for calculations. To restore defaults, select the “Restore Defaults” button. (See below.)

“Restore Defaults.” This button deactivates all of the user-generated values in the budget and restores the default figures based on the “Cost” and “Area” selected. To restore user values, select the “Apply User Values” button. (See above.)

“Copy Budget.” Selecting this button will create a duplicate budget. Multiple copies of the same budget may be created. Each new budget must be named before it can be opened.

“Navigation buttons.” Navigate between various budgets for the same model using the navigation buttons on the bottom left hand corner of the screen (Labeled “Record: 2 of 2” “Record: 1 of 2” etc.)

“Delete Button.” Selecting Delete will delete the budget shown on the screen. There is no undo for this action.

Context sensitive Help is available throughout Libris DESIGN by clicking on the question mark “?” icon on the Libris DESIGN toolbar. The Help screen that appears will relate to the active window. Look for the window with a dark blue title bar relative to the other open windows.

Click the Dictionary button (book icon) on the upper right hand corner of the tool bar for definitions of terms used in Libris DESIGN, descriptions of Inventory Items, and explanations of basic planning assumptions in the database. There is an illustrated version of this Dictionary (Glossary) on the Libris DESIGN website.

“Close Screen Button.” Exit the budget screen and return to the Library Model Screen by clicking the “Close Screen” button or the x in the upper right hand corner of the screen.

Reports

The data in any Library Model in Libris Design can be previewed by clicking on the "Reports" button on the bottom of the Library Model screen. (Be sure the selected library model is showing in the Model Name box at the top of the Library Model screen.)

A printer driver is required to use Reports, which are a function of Print Preview in Access. All Reports are read only. Reports can be printed, sent to Microsoft Word, or saved as a Microsoft Access Snapshot.

Tips for Using Libris Design Reports

1. Users are cautioned to check the length of a report before printing. To identify the length of a User Report, check the page numbers in print preview found in the lower right hand corner.
2. Narrow the data in a report to focus on an individual Division or Space, by selecting a User Report with the (Select) option.
3. To include an additional text line with the physical description of inventory items in a specific report, click on the "Include Descriptions" box before previewing the report. (This can make reports quite long.)
4. To move forward and backward through a User Report, click on the right hand arrow next to the page number box in the lower left hand corner. (Navigation arrows.)
5. To print a Report, click on the print button on the toolbar in Print Preview.
6. Reports can also be exported to Word by clicking on the ***W*** on the toolbar. Reports can then be reformatted, customized or compiled with other Microsoft Word documents. Users should note that much of the formatting is lost in the conversion to a word document.
7. Use the Snapshot feature (icon of book with lightning bolt) to send individual reports to your desktop or other locations. Snapshots, which are view only individual reports, are fully formatted as shown on the screen and the files are small enough to be sent via email. Recipients do not need to have Libris Design on their desktop, but they must have Microsoft Access or Access Viewer (free and downloadable) on their hard drive or network.
8. Searching Reports. The *Find* function is not available in Reports. To search a Report for a particular item or term, export it to Microsoft Word and use the "find" (Ctrl F) function.

There are eight tabs on the User Reports screen that provide access to many reporting options. Buttons under each tab lead to detailed reports. In some cases, you will get a one page summary report and in others, you select details and levels of description to limit the content of the report. All reports show in Print Preview mode. The last "Open Final Menu" tab is used to produce the Libris DESIGN portion of the Library Building Program.

Nearly fifty different reports are available with a hierarchy of data ranging from total building summaries to specific and detailed furniture and equipment lists.

Reports are broken down into the following categories:

Square Footage: These reports include data about the size, quantity, and percentage of total square footage for Divisions, Library Spaces, Furniture and Equipment items, and Collection Shelving within these Divisions and Library Spaces for a selected Library Model.

Cost: These reports include Furniture and Equipment and Collection Shelving costs organized by Divisions, Library Spaces, and Furniture and Equipment inventory items in selected Library Model.

Divisions and Spaces: These reports include both brief and detailed text descriptions and summary lists for Divisions and Library Spaces including Functional Activity descriptions and Spatial Relationships for Divisions and Library Spaces as well as Furniture and Equipment and Collection Shelving information.

Supercategories: Furniture and equipment and shelving is organized into six broad categories: Meeting Rooms, Reader Stations, Technology, Shelving, Staff Workspace, and Special Purpose. These Supercategories reflect the type of information commonly required for reporting and funding application purposes.

Suppliers: Supplier category reports provide lists of Inventory Items sorted by supplier source or category to prepare purchase lists by source. You can select from the Libris DESIGN supplier categories or create your own. Reports can be generated with or without prices and may be used as bid lists.

Collections: These reports provide detailed information on collection allocation, square footage, shelving types and costs.

Admin: These reports serve as the “authority file” for the database. Complete lists of items available for selection are organized into categories: Collection Subcategory, Inventory item, and Shelving Type. Reports include specific information on square footage; pricing levels, default space assignments or shelving type, subcategory and volume names.

Open Final Menu (Final Building Program): Outlines steps required to organize and produce a Building Program utilizing the data created in Libris DESIGN and other information for inclusion in the final Building Program document.

Using Reports

Opening and Closing Reports

1. Identify which report you would like to preview by selecting from the various tabs that open the Report lists. Choose from the list. Click button to open.

2. If you select a Summary Report from the list you will go directly to Print Preview.
3. Some reports will present an option to "include descriptions" in the report before actually previewing the report. If you select this option by placing a check in the box, an additional line, which physically describes an Inventory Item, will be included in the report.
4. All reports present the option of including a “Date Stamp” in the footer. If selected (place a check mark in the box) the date will show in the footer of the printed report, enabling you to identify specific versions of a Report.
5. Selecting a summary report (one with “Select” in the name) will open an additional window. You will need to click on an item in the new window to limit the content of your report.
6. Click the "Preview Selected Report" button that appears on the right of the User Reports window to open any Report that does not open automatically.
7. Click on the x in the upper right hand corner of the print preview screen or hit the Escape key to close any report. Do not click on the x in the uppermost right corner of the screen; this will close the program.
8. Click the Stop Sign on the right hand sign of the screen to return to the Reports Menu at any time.

Buttons on the User Reports Screen

Context sensitive Help is available throughout Libris DESIGN by clicking on the question mark “?” icon on the Libris DESIGN toolbar. The Help screen that appears will relate to the active window. Look for the window with a dark blue title bar relative to the other open windows.

Click the Dictionary button (book icon) on the upper right hand corner of the tool bar for definitions of terms used in Libris DESIGN, descriptions of Inventory Items, and explanations of basic planning assumptions in the database. There is an illustrated version of this Dictionary (Glossary) on the Libris DESIGN website.

“Exit User Reports” Button. Click to close the User Reports window or click the x in the upper right hand corner of the screen.

Descriptive Catalog of Reports

Square Foot Summaries Reports SF

Reports in this category provide data about the size, quantity, and percentage of total square footage for Divisions, Spaces, and Furniture And Equipment and collection shelving within these Divisions and Spaces for a specific Library Model.

SF1 Division Square Foot Summary

1. Simple total square footage summary organized alphabetically by Division name with assignable square feet for each Division and percent of total (building) by Division. Includes non-assignable space allowance at the end of the report.
2. Provides a quick overview of the building contents.

SF2 Space Square Foot Summary

1. Detailed total square footage overview alphabetically by Division name with Spaces organized by Division. Includes total square footage for Division as well as square footage for each Space in the Division. Includes non-assignable space allowance at the end of the report.
2. Can be used to review Spaces in each Division, to verify which Division an individual Library Space has been assigned to, and to review sizes of individual Library Spaces.
3. Provides a quick overview of the Divisions and space requirements for the library.

SF3 Space Square Foot Summary (Select)

1. Same detailed square footage data contained in SF2 with ability to limit data to a single Division for a briefer report.
2. Enables user to review a single Division at a time. Provides briefer focused reports for review or distribution.

SF4 Space Sq. Ft Summary with Furniture & Equipment and Shelving

1. Detailed report organized by Division and Space with complete listing of furniture and equipment items and collection shelving selected for each Space. Contains number of units, square foot allocation per unit, and total square foot allocation for furniture and equipment items selected for inventory list. The number of volumes housed by shelving units is also displayed by collection name.
2. Can be used to review contents of individual library spaces. This report can be used to verify that a particular furniture or equipment item has been included. Data is available in the same format with cost information attached instead of square footage in User Report CS4.
3. This report can be quite long. For briefer reports, this data is available by Division in User Reports: SF5 Space Square Foot Summary with Furniture and Equipment (Select). Turning off the "Include Descriptions" will also shorten the report.

SF5 Space Sq Ft Summary with Furniture & Equipment and Shelving (Select)

Same content as SF4 available for selection by specific Division. Provides briefer focused reports for review or distribution.

SF6 Net Sq. Ft. Summary for Furniture & Equipment and Shelving

1. Complete furniture and equipment and shelving list for facility compiled and tallied, for all Spaces, by Inventory Item. Alphabetical list sorted by furniture or equipment item includes total quantity of item, square foot allocation per item, and total square footage for item. Shelving which is not assigned to a specific collection is included in this list; e.g., shelving units in offices and workrooms.
2. A second list at the end of this User Report compiles shelving requirements for collections by total shelving units and square footage requirements.
3. This report can be used to verify inclusion of individual items and to identify total quantity of individual furniture and equipment items and shelving units; e.g., number of bulletin boards. This report can be used for cross checking against existing inventory. (Prices not included in this report)
4. Hint: This list can be used as an “authority file” for inventory items to verify exact names of selected existing Inventory Items in this report.

SF7 Square Foot Overrides and Extremes

1. Provides a list of overrides to default square footage by Inventory Item that you have entered in this Library Model.
2. A second column ("Extremes") shows the square footage figures for a list of furniture and equipment where you have overridden the default square footage and gone outside the suggested maximum or minimum square footages.

Cost Summaries Reports CS

Reports in this category provide information about the unit cost, quantity of items, and total furniture and equipment and collection shelving costs organized by Divisions, Spaces, and furniture and equipment inventory items in specific Library Model.

CS1 Division Furniture & Equipment and Shelving Cost Summary

1. Simple total furniture and equipment and collection shelving cost summary organized alphabetically by Division name with cost of furniture and equipment and collection shelving for each Division and % of total furniture and equipment cost by Division.

2. Can be used for a quick overview of the project's furniture and equipment and collection shelving costs and relative costs by Division.

CS2 Space Furniture & Equipment and Shelving Cost Summary

1. Detailed total furniture and equipment overview organized alphabetically by Division name. Includes total furniture and equipment and collection shelving cost for Division as well as furniture and equipment and collection shelving cost for each Space assigned to the Division.
2. Identifies specific furniture and equipment and collection shelving costs associated with specific Spaces. This can be useful for evaluating cost of specific program areas as well as providing information for donor opportunities.

CS3 Space Furniture & Equipment and Shelving Cost Summary (Select)

Same detailed furniture and equipment and collection shelving cost information contained in CS2, with ability to select by specific Division. Provides briefer focused reports for review or distribution.

CS4 Detailed Space Furniture & Equipment and Shelving Cost

1. Detailed report organized by Division and Library Space with complete listing of furniture and equipment items and shelving units selected for each Library Space.
2. Contains number of units, cost per unit, and total cost for furniture and equipment items selected for inventory list.
3. The number of volumes housed by shelving units is also displayed by collection name.
4. Useful for review furniture and equipment and shelving contents of individual Library Spaces and to verify a particular item has been included. Contains information in the same format as SF4 with cost instead of square footage requirements.
5. Caution: This report can be quite long. Choose CS 5 Detailed Space Furniture and Equipment Cost Summary (Select) for a brief report and/or remove item descriptions from list.

CS5 Detailed Space Furniture & Equipment and Shelving Cost (Select)

Same content as CS4 available for selection by specific Division. Provides briefer focused reports for review or distribution.

CS6 Cost Summary for Furniture & Equipment and Shelving

1. List by item (furniture or equipment) name with number of units by item, unit cost per inventory item, and total cost by item for total building.
2. Shelving units which are not assigned to a specific collection (volume type) are included in this list; e.g., shelving units in offices and workrooms.
3. A second list at the end of this User Report compiles shelving requirements for collections including total shelving units and cost information.
4. Can be used to locate individual items to make sure they have been included in the building program. It does not identify the Space that the item has been assigned to. Primarily used to identify total quantities of items; e.g., number of bulletin boards, this report is useful for organizing information for purchasing, donor opportunities, or cross checking against existing inventory.

CS7 Cost Overrides and Extremes

1. Provides a list of overrides to default prices by furniture and equipment inventory item that you have entered in this Library Model.
2. A second column ("Extremes") shows the cost figures for a list of furniture and equipment including shelving where you may have overridden the default cost and gone outside the suggested maximum or minimum costs.

CS8 Project Cost Estimate Summary

1. This report enables you to review project budgets you have created for specific Library Models. If no budgets have been created, no reports will be available. To create a budget, exit User Reports and Select Budgets from the Library Model Screen.
2. To view your project budgets, first select from three types of budget: New construction, Remodeling/Conversion and Expansion and Remodeling and then click on the name of a specific budget.
3. Budgets can be printed from this User Report or sent to Microsoft Word for reformatting or compilation into another Microsoft Word document.

CS9 Project Cost Estimate with Details

1. More detailed cost estimate with more breakdowns by category than in CS8.
2. Cost per square foot for each line item is shown along with the percent of the total project cost. Data you have entered in the pull down screens to develop line items will print in this report.
3. Same printing and use features as CS8

Divisions and Spaces DS

This category provides both brief and detailed text descriptions and summary lists for Divisions and Spaces including functional activity descriptions and spatial relationships for Divisions and Spaces. Reports from this category will become the body of the Building Program document.

DS1 Division Sheets (All)

Simple one to two page description for each Division including total square footage of Division, functional activity, spatial relationships and summary of library spaces included in each Division.

DS2 Division Sheet (Select)

Same data set as DS1 with ability to limit retrieval by specific Division.

DS3 Division Functional Activity Description

1. A compilation of all functional activity text for all Divisions included in a specific Library Model. Does not include information on individual Spaces within Division.
2. Provides an overview of the program goals and qualitative aspects of the library's program.

DS4 Division Spatial Relationship

1. A compilation of all spatial relationships text for the Divisions included in a specific Model. Does not include information on individual Library Spaces within Division.
2. Useful for overview of the physical organization of the building and for preparing bubble diagrams.

DS5 Detailed Division and Space Sheets (All)

1. Basis of the Building Program
2. Detailed, lengthy report including description for each Division (also available in DS1) as well as complete Library Space Sheet for each Space included in the Division.
3. Library Space Sheet includes all text available for each of 18 Space Detail text fields (space information, function, occupancy, flexibility, collections, security,

relationships, acoustics, finishes, illumination, fenestration, HVAC, electrical, telecommunications, audio-visual, signage, illustrations, and access). The heading for a text field (see above) will not appear in the Report if there is no text in the field.

4. The number of Space Detail text fields displayed in the Space Sheet can be limited if Draft One or Draft Two options are selected. When draft options are available in Reports, Draft One will contain the text in the Functional Activity and Relationships gray tabs only. Draft Two will contain Functional Activity, Occupancy, Collections, Relationships, and Special Features. Draft Three will contain the text for all 17 of the space detail fields.
5. Report includes all furniture and equipment and shelving for collections assigned to the Library Space listed alphabetically.
6. This can be quite a lengthy report. To limit by individual Divisions use Report DS6 or Select Draft One or Draft Two options. (See #4 Above)

DS6 Detailed Space sheets by Division Space (Select)

1. Report provides same data as DS5 with ability to limit data provided by selection of individual Library Space within a Division.
2. You will select Division from a pick list window and then Space from Pop-Up window.

DS7 Space Detail (Select) for all spaces

1. Report compiles all text available from one of 17 specific text fields (excludes Space Info) for individual Library Spaces. Select a specific text field (Space Detail), to review data available in a selected text field by Division and Space within a Division.
2. Report can be used to review and evaluate specific general building conditions in the building program or to identify empty text fields for missing or incomplete information.
3. If a space does not have any text in the text field for the Space Detail selected, the space name will not display under the Division in the list.
4. When a specific space detail (text field name) is selected, and there is no text for that text field in any of the spaces for the Library Model selected, a "No data available" message screen will appear.

Supercategories SC

Libris DESIGN has organized the furniture and equipment and shelving content of the Library Model into six broad categories: Meeting Rooms, Reader’s Stations, Technology, Shelving, Staff Workspace, Special Purpose. These Supercategories reflect the type of information commonly required for reporting and funding application purposes.

SC1 Space Allocation by Supercategory

1. Overview summary of each of the six Supercategories including total net assignable space, non-assignable square feet, and percentage of total space by each Supercategory.
2. Brief summaries can be used to identify percent of total space assigned to specific function.

SC2 Allocation of Supercategory Items by Space

1. Detailed listing of Supercategory inventory items organized by Division and by Library Space within each Division.
2. Useful for identification of distribution of various items throughout the building program; e.g., identify all of the meeting room seats and their location.
3. Caution: This is a very lengthy report. Selecting "Include Description" will make this report nearly twice as long.
4. Shelving Supercategory does not include shelving units which are not assigned to collections; e.g., shelving units in offices and boardrooms. These are in Staff Workspace or Special Purpose Supercategories.

SC3 Allocation of Supercategory Items (Select) by Space

Contains same data as SC2 with ability to limit selection by specific Supercategory.

SC4 Totals for Item Types by Supercategory

1. Contains complete list of inventory items, quantity of items, and total square foot allocation by item organized by Supercategory; e.g., Special Purpose Supercategory contains total count of book trucks in the project.
2. Supercategory unit lists can be used for organizing data for verification of quantities of specific items; e.g., lounge chairs.

SC5 Totals for Item Types by Supercategory (Select)

Contains same data as SC4 with ability to limit selection by specific Supercategory for briefer report.

SC6 Cost Summaries by Supercategory

1. Data in same format as User Report SC4 Furniture and Equipment items sorted by Supercategory for total building with cost information instead of square foot requirements.
2. Data is further sorted into items identified for public vs. staff use.

3. Report can be used to identify costs associated with specific items within a Supercategory for budgeting or fundraising purposes; e.g., identification of costs associated with Technology for Public Use.

SC7 Cost Summaries by Supercategory (Select)

Contains same data (Furniture and Equipment items sorted by Supercategory) as User Report SC6 with the ability to limit selection by specific Supercategory to view a briefer report. Data is further sorted into items identified for public vs. staff use.

SC8 Supercategory Cost Summary by Space

Contains same data (Furniture and Equipment items sorted by Supercategory) as User Report SC6 with additional sort into Spaces. Report SC8 enables users to identify specific costs by Supercategory for a specific Library Space; e.g., cost of reader seats in Children's Collection and Seating Area.

SC9 Supercategory Cost Summary by Space (Select)

Contains same data as report SC8 with ability to limit search by selecting specific Library Space. Useful for providing briefer more focused cost estimates for Furniture and Equipment.

Supplier Reports S

Contains Reports that provide lists of Inventory Items sorted by supplier source or category to prepare purchase lists by source. Select from the Libris DESIGN supplier categories or create your own. Supplier lists are available sorted by Supplier, by Space or by Space by Supplier. In the Supplier Reports Menu you will make the choice whether you want your reports to contain pricing. This can be changed at any time.

S1 Supplier Furniture and Equipment and Shelving Master List

This report contains the entire list of furniture and equipment and shelving in the Library Model listed alphabetically sorted by Supplier source.

S2 Supplier Furniture and Equipment and Shelving Master List (Select)

1. This report contains the same information as report S1 with the ability to limit the selection to an individual supplier category. This list would be used to prepare a bid or purchase list for a specific supplier or source.
2. If categories, such as “Existing” are used, this list can be used to identify items that will be reused.
3. If categories such as General Contractor or Casework are included, this report can be used to identify items that may not be included in the furniture and equipment budget.

S3 F & E and Shelving List by Space (All Supplier)

This report lists all Spaces, sorted alphabetically, by Division, with all furniture and equipment and shelving listed broken down into supplier categories.

S4 F & E and Shelving List by Space (Select by Supplier)

This report lists all Spaces sorted alphabetically by Division, with all furniture and equipment and shelving for that Space for a specific supplier. This list could be used to prepare a purchase or bid list for an individual space in the project.

S5 Supplier F & E List by Library Space (All Supplier)

This report lists all items to be purchased from all Supplier listed alphabetically by Space. This list could be used to identify the locations for items on a bid or purchase list.

S6 Supplier F & E List by Library Space (Select Supplier)

This report lists all items to be purchased from a Specific Supplier alphabetically by Space. This list could be used for a specific supplier to identify the locations for items on a bid or purchase list.

Collections C

Contains Reports that provide detailed information on collection allocation, square footage, shelving types and costs for a selected model.

C1 Collection Allocation

1. Overview of total holdings with information on holdings sorted by category and volume type.

2. Simple report with collections organized into three reports by categories (books, media, periodicals) including alphabetical listing of volume types (adult/young adult and children/juvenile) with information on total volumes, % of total holdings, percent of volumes in circulation, and number of volumes per linear foot.

C2 Collection Allocation (Select)

Same data as available in C1 with ability to limit selection by format of material (books, media, periodicals) to limit amount of information retrieved.

C3 Collections and Shelving

1. Shelving the Library's Collection. Report provides data on number of shelving units and space allocation by Collection Name.
2. Collection data is available for three categories (books, media, periodicals). Each report includes data on projected number of volumes on shelf, volumes per linear foot, number of shelving units required, square feet per shelving unit, and total square feet required for collection by both Collection Category (adult/young adult and children/juvenile) and Volume Name.
3. Can be used for determining space allocation or number of shelving units for individual collections.

C4 Collections and Shelving (Select)

Same data available as in User Report C3 with ability to limit data selection by Collection Type (Book, Periodicals, Multimedia.)

C5 Volumes per Linear Foot Overrides

Provides a list of overrides to default volumes per linear foot by volume type that user has entered in this Library Model. Useful to identify potential errors or extreme overrides that might affect total square footage.

Administrator RM

These reports serve as the "authority file" for the database. Complete lists of items available for selection are organized into categories: Collection Subcategory, Inventory item, and Shelving Type. Reports include specific information on square footage, pricing levels, default space assignments or shelving type, subcategory and volume names.

RM1 Volume Type and Default Shelving Master List

List of specific Collection Volumes available including default shelving and volumes per linear foot for each volume.

RM2 Subcategory and Default Space Assignment Master List

List of Subcategories of Collection Types available includes default Space Assignment.

RM3 Inventory Item Master List

1. List of Inventory Items available for selection. Includes square footage (minimum, default, maximum) and cost (low, moderate, high). Also includes brief physical description of item, and Supplier and Supercategory assignment.
2. You may prefer to search this list before attempting to create new item for specific Library Spaces since assignable square feet and pricing information is included.

RM4 Shelving Type Master List

Complete list of shelving types available for selection. Includes aisle widths, height, depth, facing (single or double) information and number of shelves per unit as well as square foot per unit and cost information.

RM5 Library Model Master List

Overview of all Users' Library Models in the Libris DESIGN database. Useful for file management when multiple models are being worked on.

RM6 Consistency Check

Follow instructions in green box.

1. The "Consistency Check" button allows the user to run 12 separate diagnostic reports that will tell the user if there are any calculation problems within the selected Library Model.
2. This report should be run periodically (and definitely prior to final building program printing) as a database diagnostic. If there is a problem with the database, a report or series of reports will be generated. Follow the instructions provided in the gray box at the top of the report, to fix any problems in the database calculations.
3. If there are no problems with the database calculations, a "No errors were detected" message will appear.

Final Reports

This section of User Reports provides the tools to organize and produce a Building Program utilizing the data created in Libris DESIGN and other information you wish to include in the final Building Program document. Follow the warning message and close down all other applications before using this series of screens.

In the Final Reports menu, follow this sequence for the best results:

1. Click on Open Final Menu.
2. Read warning message and close all other programs.
3. Open the Organize Reports section, which is gray tab number two on the Building Program Menu.
4. Review the proposed list of sections for the documents. Select the chapters for Building Program
5. Follow the on-screen instruction for deleting, adding, and renumbering sections. Do not delete any chapters containing Libris DESIGN reports until you have examined the contents of that chapter. (See Step 6). Proceed through Step 9, then return to Step 5 and delete Chapters after reports have been moved.
6. Click on gray tab number three to open each of the proposed sections and review the User Reports assigned to these sections.
7. To remove a specific report from a section, delete the number in the Rep # box.
8. To move a specific report to another section, change the number in the Sect. #box. Your report will automatically move to that section for the final document.
9. To change the sequence of reports within a section, change the numbers in the Rep# box.
10. To generate the final report, open gray tab number four. You can preview the Table of Contents, preview the entire report, or print the entire report from this screen.
11. In the Preview mode the reports will scroll by quickly as Libris DESIGN compiles them for your final building program. To view any of these reports individually, you can either click on the green report (notebook) icon on the tool bar on the bottom of your screen, or you can click on the Windows button on the upper right hand side of your tool bar to open a list of all of the reports. Click on any of these to open them.
12. The Table of Contents will identify chapters and sections, which you will have to write using a word processing program, or create using a spreadsheet program.
13. To collate the final document, use section numbers for your other documents which are consistent with the Table of Contents, print these pieces and insert into the building program before reprinting. Libris DESIGN will not physically collate your final document.
14. The Table of Contents can be sent to Microsoft Word before printing to insert the page and section numbers for the other reports. Send any report to Microsoft word by clicking on the fat blue W in the upper tool bar, but much of the formatting will be lost.
15. Once you've determined you want to print the report, click the Printer icon in the toolbar to print the entire report.