



## Making Libris DESIGN Work for You



### How do I get Libris DESIGN?

1. Copy Libris DESIGN 5.0 from the CD and park it somewhere on your desktop or program folders. Rename it so it cannot accidentally be overwritten if you send another copy of Libris DESIGN to your desktop.
2. Open the program as a new user, enter “nu” for password and then enter your own name and create a password. If you need help with any of these instructions, go to the User Help Documentation section on the website and download the appropriate Help Documentation.



### Now what?

3. From the available models list, choose the Expert model that most closely relates in size and type to your project. Open it and name it.

### This is the model you will be customizing.

4. Go to the reports menu and Print out a Space SqFt Summary Report **SF2**
5.  Mark up the Report to reflect your project looking for
  - a. What Divisions need to be added?
    - i. What spaces need to be added in the missing divisions
  - b. What Divisions should you delete?
  - c. Which Spaces within Divisions should you delete?
  - d. Which Spaces should be moved to other Divisions?
  - e. Disregard the sizes of Spaces and Divisions for the time being.
6. Go through the (blue) screens and add and delete Divisions and Spaces as needed.
  - a. For each Space you add, you will populate it with furnishings and equipment
  - b. Reminder to go to User Help Documentation if you need help with any of these screens.
7. Print out a **SF4** (Space SqFt Summary with F & E) and  mark it up to determine what furniture and equipment to take out and what to add. Verify the quantities. (A shorter report by Division and Space can be printed if you need to share only a subset of all Division/Space. Use the **SF5** report.)




### Now that you have a picture of what your building spaces will be, begin work on the collections.

8. Print out a Collection Allocation Report **C1**
9.  Mark up the Collection Allocation Report to match your future (planned) collections, looking for:
  - a. What Collections, Categories or Subcategories need to be added, deleted, consolidated, or renamed?
10. Go through the Collections (pink) screens and add or delete Collections, Categories, Subcategories and Volumes to make what's in the model agree with your Collections.
  - a. Go to User Help Documentation for Help with the pink screen if you need it.
11. Print out a Collections and shelving report **C3**
  - a.  Mark up any default shelving types you would like to change.
  - b. Return to the Collections screen (pink) and make the changes

**Don't worry about collection sizes in the pink screens or error messages about collection sizes. You're going to adjust the collection sizes to match your project next.**

12. Go to the Collection allocation screen (purple) for each Collection (Book, Multimedia, Periodical) and enter:
  - a. Total Holdings at the top right hand corner
  - b. Target Holdings by Adult/YA and Children/Juvenile Category breakdown (using Record Navigation buttons at bottom of screen.)
  - c. Holdings and Percent in Circulation for each Subcategory/Volume
  - d. Verify that the sum of the Volumes on each screen (Actual), matches the Target holdings for that Collection category. Error message will alert you if numbers do not balance. Enter Volume holdings (in whole numbers) until Actual holdings match Target Holdings or revised Target Holdings.
13. Print out a new Collection Allocation Report **C1** to be sure it is accurate for your project.


**And now the details....**

14. Print out a Function Description report **DS3** and  mark up the text to agree with your project.
  - a. Go in to the correct Division/Space to edit the Function text
15. Print out a Spatial Relationships report **DS4** and  mark up the text to agree with your project. Pay special attention if you have deleted Divisions/Spaces to be sure that you take out any reference in the Adjacent, Close, or Proximity areas at the bottom of the Relationships field. Check the text in “Signage” too in case you changed the name of a space.
  - a. Go in to the correct Division/Space to edit the Relationships text
16. If you want to look at all of the function descriptions, and other text at the same time, print out a **DS5** Divisions and Space Sheets (all) report and  mark up all of the text as well as reviewing all of your work on the furniture and equipment and collections so far.
  - a. To review individual Divisions, print out a **DS6** Division and Spaces Sheets (Select) report.
17. To review specific Space Details print out report **DS7** and select the Space Detail to review.
  - a. Change the text in the Occupancy Detail if you have deleted or added reader seats, technology stations, or staff workstations in any Space

**Are you in the right ballpark?**

18. Go back to Square Foot Summaries Reports **SF1** or **SF2** to make sure that your building is still in the right size range.
19. Go to the Supercategories Reports for an overview of the contents of your building.
  - a. Review the **SC4** Report to see if you have included enough staff workstations, Reader seats, Technology and Meeting Rooms.
  - b. Review the **SC2** Report to see if they are where you want them to be?

**Final Report**

You’re ready to print your final building program using Libris DESIGN when you have created all of the pieces to be assembled. Many of these pieces will come from other documents in other formats that you will collate together into the final building program. Go to the final report menu and create a Table of Contents for your document using the menu and help available (For context sensitive help click on the  in the right hand corner of the upper tool bar.) After you have formatted your Table of Contents you may preview it, print it, or print the Libris DESIGN portion of the entire document.