

## Progen4GL for Windows – Library System

The software supplied to you has been written in **Progen4GL for Windows**. The Limrose Group has been involved in developing software systems for over a decade now, and have produced a large number of packages and customised applications using this technology.

As the same 4GL-engine is used on all Progen4GL sites, the resulting software is **robust, reliable and easy-to-use**. It can also be customised at a modest cost to meet user requirements.

You can use this software almost intuitively, without reading the manual from cover-to-cover. However, you are expected to be familiar with the windows operating system and suggest that you use the system with the book in front of you.

Installation of the system is straightforward. However, **an authorised Progen4GL Consultant must install the multi-user version to realise its full potential**.

This system has been developed in conjunction with many libraries, whose enthusiastic and helpful suggestions have been indispensable. Some libraries have now been using the Progen4GL Library system for over 10 years.

We have a policy of continuous development to keep pace with modern technology and this software runs on **Win98/XP/2000/NT** as supplied.

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## INTRODUCTION

The **PROGEN Library for Windows** is a versatile administrative software tool for libraries with about 100,000 books and other items. The software runs on **Win98, WinNT, Win2000 and WinXP** on IBM-compatible PCs. Memory requirements vary from a minimum of 64MB for Win98, 256MB for WinXP/Home and 512MB for WinXP/Prof. You also require a CD Rom drive, about 100 MB of free space on the hard disk, a Mouse and compatible barcode reader to operate the system. Although the software has been designed for use in conjunction with a **barcode reader**, it can be used without one. It can also be customised at a modest cost to meet your requirements.

A run-time copy of the **Progen4GL Relational Database Management System** is included in the package, which also includes software to print your own barcode labels. It is also Internet enabled to **access websites by clicking on the appropriate box, then Google etc.** The optional **Resource CD**, which has data on thousands of books, can be used to **“import”** book data simply by swiping the publisher’s barcode to build the catalogue.

Maximum number of catalogue items in the basic package is about 100,000. Compatible software for Serials Management, Acquisitions and multi-user operation is also available. **The “demo” system is limited to 50-100 records and a has a short term licence after which it cannot be used.**

The PROGEN Library system consists of the following modules:

## Title of Table

## Table Name

<b>Library Catalogue</b>	BLIST
<b>All Transactions</b>	TRANS
<b>Issues only</b>	TRANSISS (Optional)
<b>Returns only</b>	TRANSRET (Optional)
<b>User List</b>	ULIST
<b>Loan Status File</b>	LSF
<b>Media List</b>	MEDIA
<b>Fines</b>	FINES (Optional)

The optional “single-function” modules for **ISSUES** and **RETURNS**, together with the **FINES** module, can upgrade Progen Lib to a comprehensive and efficient **self-issue** system. The Fines module, and the optional **SQL search**, is not available in the basic starter system and must be ordered separately if required

The multi-user version of the software runs in true multi-user mode with **automatic and transparent record-level locking** on most industry-standard networks supporting Microsoft Windows.

The **Library Catalogue** is used to store details of books, journals, video and audio tapes, CD ROMs, DVDs, Corporate Reports etc. Each catalogue item is given a unique **“Access Code”** - a combination of letters and numbers – and a “picture” related to the items can be included in the record. Sequentially numbered bar-coded labels, suitable for use in a library, can be printed using the software included. You can search the **Catalogue** by Title, Keywords, Author(s), ISBN etc., several **“keys”** can be used together to pin point the required item. For example, all books written by Smith and having the word

Butterfly in the title could be retrieved. You can also find books on loan and overdue items, and print letters to borrowers to recall them to the library if required.

**All Transactions** module is the general-purpose "circulation" system for processing issues, re-issues, reservations, cancellation of reservations and returns of books and other media to the library. It can also be used **without a barcode reader** (in emergencies) if required. The librarian is allowed to over-ride built-in constraints in the system. For example, the librarian can issue a book to a user even if another user has already reserved it earlier. **Single-function** circulation modules for **ISSUES** and **RETURNS**, which work in a similar manner, can speed up library operations and turn it into a **self-ISSUE** system if required. To enforce security in **self-ISSUE** libraries, the **ISSUES** module **requires a bar coded User Card**, and the user, for obvious reasons, is not allowed to over-ride decisions made by the computer.

**User List** holds details of registered users allowed to borrow from the library. Each user is allocated a "**Loan Status**" code to control the number of books and other items allowed on loan, the loan period, actual number of items on loan etc. User records also display items on loan to the user and unpaid fines, if any. A **cut-off date** can be set for each individual user independently and the **User List** searched in various ways to print reports, library catalogue and mail-shots letters.

**Loan Status File** holds "**Loan Status**" codes used for setting borrowing limits for users and daily charges. For example, it is possible to charge for

lending DVDs, whereas books and other items are loaned free of charge. Although three or four Loan Status Codes are usually sufficient for most libraries, more can be added at any time. **For Corporate Users and Primary Schools, the system can be set without fines for late returns and or loan charges.**

**Media File** is usually a "**hidden**" internal file that lists various media types available in the library. Typical media types are Books, Journals, Video tapes, Audio tapes, CD Rom and DVD Rom. For Corporate Libraries, other media types to cater for internal reports and research papers can be added if required.

**Fine** module, available to schools and colleges and lending libraries, keeps track of paid and unpaid fines and other charges. A "**Holiday File**" lists dates on which the library is closed for automatically adjusting the "return date" if it falls on a holiday. The **Holiday File** must be edited by the librarian and kept up-to-date to suit user requirements.

**PROGEN Library** makes extensive use of "**menus**" and "**buttons**" to make it easy to use. Advanced users can also use the optional **SQL** (Structured Query Language) search if required, however *SQL support is supplied on specific request only.*

**Smaller libraries can run the whole system on a single PC.** For larger libraries, separate **ISSUES**, **RETURNS** and **Public Access** terminals can be added over a PC-network as required. Progen Lib also features a "**Time Out**" function which **returns control to Log-in Screen** if the computer is not used for sometime. "Time Out" time can be varied by users.

## 1. INSTALLING THE LIBRARY SOFTWARE

Before installing the software, shut down the computer and re-start it again. **Turn off any anti-virus and firewall software** and insert the **CD supplied in the computer**. Double-click on **My Computer**, and double-click the **CD ROM** drive. Then double-click the **Prog4GL** folder. To install the **VProgen4GL** database engine, double click the **VProgen4GL** icon. The other icon you will see is **VProgen**, which you can ignore for the time being.

To install **LibJunior** application files, double-click **My Computer**, and then double-click the **CD ROM** drive. Double-click **Prog4GL** folder and double-click the **LibJunior** folder. Double-click the **LibJunior** icon to install library application files. Then, double click the **DProgen** icon to install further files necessary to run the library system.

To install the **full library system**, complete with fines and other optional modules, use the **ProgenLIB** folder **instead of the Lib Junior folder**.

**The above installation procedure should install all necessary data files, Exe, Dynamic Link Libraries (.dll) and ActiveX Controls (.ocx) for Win98/XP/NT/2000 Systems. However, occasionally some .dll and .ocx may not install properly or may conflict with existing copies on your system. If this is the case, please see page 46 for manual installation of these files or contact Limrose for advice.**

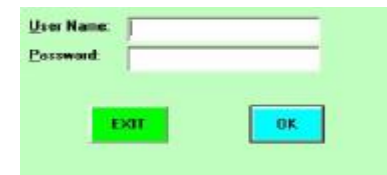
## Getting Started

Click on **START/Programs** option and click on **Vprogen4GL** to run the library system.



The screen above shows all installed databases on your computer available via the **Progen4GL** system

Click on **Progen Library for Windows**, then click the **CONNECT** button. Alternatively, you can **double click** the line to **“connect”** to the system and the **Log-in** screen shown below.



Type **User Name** and **Password** on the Log-in screen, then click the **OK** button to take you to the next screen..

**Demo systems** can be run with a blank entry for User Name and **PRDEMO** as the password. Alternatively, just click the **OK** button **without any User Name or Password for limited entry to the Catalogue only**. The next screen will show the tables and function available to you.

“**Tables**” and **buttons available to you will depend on your User Code and the Password**. Some buttons may have been “**disabled**” on your system and will not react when you click on them.

**Progen4GL** Relational Databases use interlinked “**tables**” to store data. Tables hold data as “**records**”. Records consist of “**columns**” of information such as names, addresses etc. You can **VIEW** existing records in the tables, and **ADD** new records as necessary.

**User Access Level:** **Progen Library** uses **User Levels** to control what facilities are made available to users. Standard systems are supplied with four “**User Levels**”. The highest level (999) is for the **Supervisor**, who is allowed **access to all facilities**. The lowest level (1) is “**Junior**” (or Public Access) which allows “**view only**” access to the Catalogue, and nothing else. Level 2 users, “**Senior**”, are allowed access to the **Issue and Return** screens (if set up for **self-issue**) as well. User Level 500, “**Teachers**”, allows access to the **All Transactions** and the **User List**, and to run the **library without a barcode reader if necessary**.

This screen also shows the location of the database in your computer, the **Licence Number, Licence Expiry Date, User Name and Access Level**.



**Demo systems, if entered with PRDEMO as the password, are automatically given access at the highest level.** Demo systems are supplied with some records to let you **VIEW** “tables” and **ADD** a limited number of new records.

All “**full**” systems (not demos) are however supplied with no records in the Catalogue and User tables. You must therefore **ADD** some records to these two tables first to get started. **Without records in the Catalogue and User List, the package cannot be used at all in any meaningful way.**

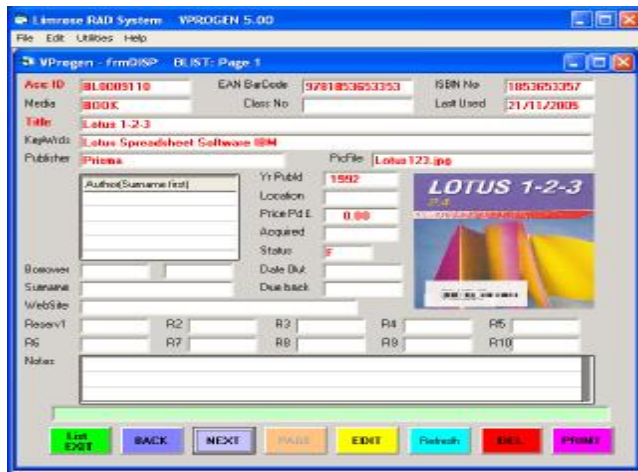
In this manual, we have minimised the use of “technical terms” and database “jargon” as far as possible, however it has not been avoided altogether.



You can safely **ignore the technical jargon** and continue with the package without understanding how tables are connected internally or the SQL (Structured Query Language) used for searching. **SQL** is actually quite difficult to use and is not normally “seen” by Progen4GL users. **Progen Library uses buttons and menus instead and you do not have to know or learn to use SQL at all.**

## 2. THE LIBRARY CATALOGUE

The Library Catalogue holds necessary data for books, journals, video and tapes, DVDs, Reports etc. It also holds the “reservation list”, details of the current borrower for loaned items and website if any.



The Library Catalogue is internally “**linked**” to other tables in the package to both send and receive information, and is automatically updated as items are loaned and returned to the library.

It also includes a “**picture box**” to hold any “**image**” relating to the item. This could be the scanned image of the front cover, or others pictures in **BMP, GIF, JPG, WMF, ICO, CUR, RLE and EMF** formats. Use a low-resolution (about 75 dots) picture to save on disk space, and may be left blank if no picture is available. The picture is included in printed reports for the catalogue, but not in the “list” of catalogue items.

### 2.1 - Adding New Catalogue Items

After selecting the **Library Catalogue** in the **List of Tables menu**, click the **ADD** button for the computer to display the screen shown on the previous page, but **without** any data.

After reading this section, you should be able to:

1. **ADD new items to the Library Catalogue.**
2. **Understand how to add and save records.**
3. **Understand how the Library Catalogue works.**

In the **ADD** mode, the computer displays a flashing cursor in a “textbox” with **yellow background** for you to enter the data. If you do not wish to enter any data, press the **Enter** or **[F1]** key to go to the next box. However, some textboxes may function in a slightly different manner and feature restrictions on data types, defaults and mandatory entry. **The following assumes that you are using the optional Resource CD to build your catalogue.**

**The cursor will then move to the next box, which will now turn yellow ready to receive your data.**

**Important – After typing the data on the keyboard, press the Enter key for the computer to take you**

*to the next relevant box automatically. If you simply “click” out of the textbox, you may inadvertently miss entering some important data.*

**2.1.1 Access ID** – Each item uses a “unique” **Access Code**. If you are using bar coded labels, stick the label on the book and **swipe the label with the bar code reader**. You can also type the **Access Code** using a combination of letters and numbers (e.g. MeanGirls1) and press the **Enter** key to go to the next box. **Access Code is a “mandatory” entry, and the computer will reject duplicate codes.**

See section 7.8 “**Printing Barcode Labels**” on how to print your own bar coded book and user labels.

**Have you noticed the “Help Box” at the bottom of the screen? The green box which displays useful context-sensitive information about the column?**

**Watch the “Help Box” next time.**

**2.1.2 EAN-13** – Swipe the **Publisher’s Barcode**, which usually begins with 978 and is on the back cover of most books, with the bar code reader. If the book you are adding is on the **Resource CD**, its Title, Publishers etc. will now be automatically “imported” and the **ISBN** box will also be filled. **If you are not using the Resource CD, press the Enter to go past these two columns.**

**2.1.3 Media Type** – Double click the “pop-up” window to select the **Media Type** for this item.

**2.1.4 Class Number** – This text box is used for recording “**Dewey**” or other classification system

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used by libraries. It can also be used to enter the **Subject** or for other purposes. Press the **Enter** key to skip if not used.

**2.1.5 Title & Keywords** – Type the **Title** for the item, and then some “**keywords**” associated with it. Each lexical word in the **Title** and the **Keyword** columns (ignoring a, as, and, the, for etc.) is automatically “**indexed**” so that you can search for an item using **any word** entered in the **Title** or the **Keyword** boxes. Keywords must be separated by spaces. Composite keywords e.g. US Gold Price must be types as US-Gold-Price or US\_Gold\_Price using a hyphen or underscore to be treated as a single keyword.

**2.1.6 Authors** – You can type the names of up to 5 authors in this “**multi-entry**” box. **Type the Surname first**, then the first name or initials, or double click an existing entry in the pop-up window. Press the function key **[F1]** if you have no more authors to enter.

**2.1.7 Publisher, Date Published etc.** - Type name of the publisher, year published and other information as required in the next few boxes, or leave them blank.

**2.1.8 PicFile** – Type the name and location of the image file (if used) or use the Windows File Picker to select the picture file, and press **Enter**.

**2.1.9 USE Code** - **F** is the “**default entry**” for this box and **F** (for Free, not on loan) will be automatically inserted if you skip past it without entering any data. Other valid **USE Codes** are **REF** - Reference, **L** - on Loan, **LR1** - on loan with one person in the reservation queue, **LR2** - on loan with two persons in

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the reservation queue, **LR3** - on loan with three persons in the reservation queue etc. **USE Code** is used by "**circulation**" modules, and is automatically updated as the items are issued and returned.

**2.1.10 Borrower & Reservation columns** - Do not make any entries in the next few columns for the time being. Press the Function Key **[F1]** to go past these columns (leave them blank) and go to next column.

**2.1.11 Web Site** - Type name of the web site e.g. [www.microsoft.com](http://www.microsoft.com) if required

**2.1.12 Notes** - You are allowed to type three lines of notes about this item as a short summary.

When you have entered data in the "**last**" textbox, the screen background will change to light yellow and the **SAVE** button will be "**enabled**". The **SAVE** button is in fact enabled as soon as you have finished adding all "**must enter**" data on the form.

You can still **edit the data** on the screen before saving it. To edit any data, click on the required textbox. Use Insert, Delete, Backspace and cursor keys to edit data as necessary.

To save the data entered by you, **click the SAVE button**. After the data has been saved, you will be presented with another blank data entry screen. To exit from the **ADD** mode, click the **EXIT** button. You can also usually exit by pressing the **[ESC]** key on the keyboard.

Some Progen4GL screens use **multiple pages** for data entry. The Page Number and Total Number of Pages (if more than 1) are displayed in the "**blue**" bar

at the top of the active window. **You can use PgUP and PgDn keys to move between pages.**

The pop-up window in the **ADD** mode can sometimes hide important information. The pop-up "list" can be turned **OFF** or **ON** by pressing the Function Key **[F10]** or by clicking the **List View/Hide** button.

One of the buttons on the **ADD** form is used for printing reports. The **print SAVE** button allows you to print "reports" from the form immediately after the record has been saved. On the next form, double click to select the report, then print using Windows **Print Dialog Box** as usual.

**Also see section 7.1 on how to copy an existing catalogue entry.**

### **3. VIEWING THE CATALOGUE**

After reading this section, you should be able to:

- 1. VIEW Library Catalogue and other tables**
- 2. Learn how Progen4GL search works**
- 3. How to edit/delete existing records**

Return to the **List of Tables** menu. Click on the **Library Catalogue**, then click the **VIEW** Button.

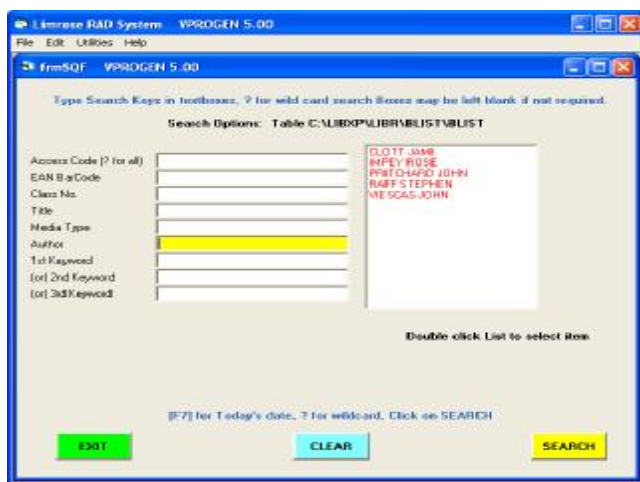
The computer will now display the search form (frmFIND) with the **Search Options** menu for the **Library Catalogue**.

**3.1 Display List of Books** - Select the first option in the menu by double clicking on it.



The computer will now display the screen shown below for you to enter the **Search Criteria**. You can now enter search “**keys**” in the appropriate “**query boxes**” to search the catalogue.

The “**query boxes**” for this table include **Access Code**, **Class No**, **Title**, **Media Type**, **Author** and three **Keyword** boxes. You can use one or more of these boxes as necessary to narrow or widen the search. **Unused boxes must be left blank**. You can click directly on the required box to type or select the “**key**” from the pop-up window.



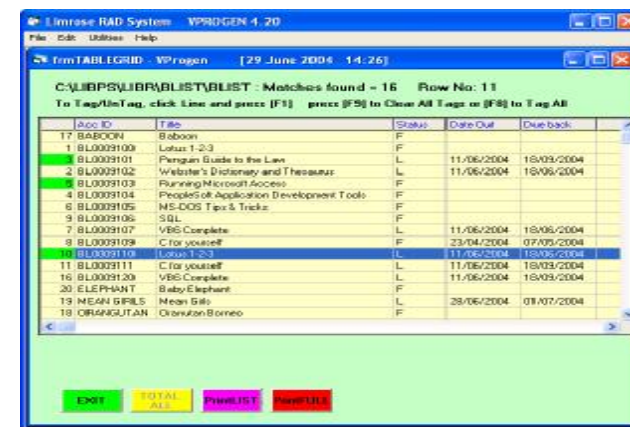
The Catalogue query form shows the cursor in the **Author** box, with the pop-up window showing a list of **Authors**. To search for all books by an author, **double click** the author in the pop-up window, then click the **Search** button. Similarly, you can use **Access Code** for searching the catalogue by typing the Access Code for the item on the keyboard, double

clicking the pop-up window or by **swiping the label with the bar code reader**.

The **CLEAR** button clears all query boxes. **Any unused boxes must be left blank for the search to work properly**.

**3.1.1 Wild-card Search** - If you type a ? in the **Access Code** box (instead of typing the full code) and click the **Search** button, all records will be found and displayed in the “**multi-line grid**” as shown below. **Wild-card searches can be used for all columns except dates**.

The default display mode after the **Search** button is clicked is the “**multi-line grid**”, which displays a **one-line summary** for each record found as shown below. Columns displayed on the grid can be altered if required. It also displays the number of “**rows**” found.



You can **highlight** a row by clicking on the line, and scroll up and down the grid using the **Cursor**

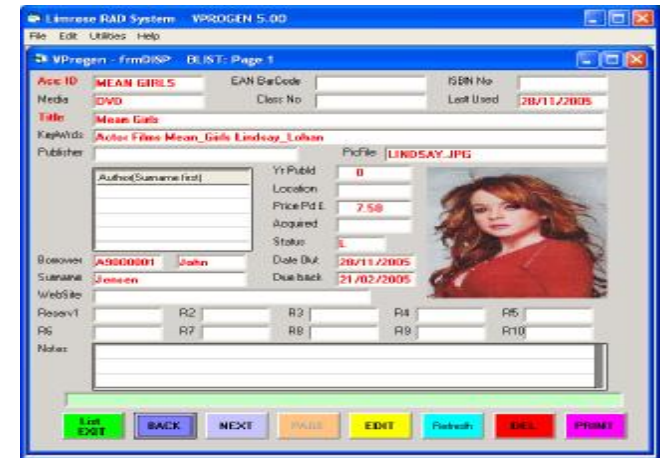
**Up/Down** keys. **PgUp** and **PgDn** keys may also be used if a large number of “rows” are found, in which case the computer displays **additional buttons** to help you navigate using “pages” of 500 rows or so.

**3.1.2 Tagged Records** – To refine your selection further, you can “**Tag**” a selected row by pressing the function key **[F1]**. A tagged row shows a **green** marker in the first column. In the example shown above, row numbers 3, 5 and 10 have been “tagged”. If the **PrintLIST** button is now clicked, only “tagged” rows will be listed. You can also “**exclude**” tagged records from the printed list if required. All records can be “tagged” by pressing the function key **[F8]** and “untagged” by pressing **[F9]**. To “**unTag**” a previously tagged record, click on the row to **highlight**, and press the function key **[F1]**.

**3.1.3 Full Display** - You can display full details of a record by double clicking on the corresponding grid line. Alternatively, if a line has already been selected (i.e. it is highlighted), press the **Enter** key to display the full record.

The computer will now display the record in “full” as shown on the next page. However, the computer can go to the full display mode automatically if only one record is found by making a minor alteration.

**If you have entered the system using a lower Access Level, you may see only limited information** - some users are not allowed to see sensitive information this way. This, otherwise, is the same screen you have seen earlier when adding records to the catalogue.



To “**edit**” the record, click on the **EDIT** button, which will change the screen **background** to light yellow. Click on the textbox and edit the data using Insert, Delete, Backspace and cursor keys. **Click the SAVE button to save data.**

You may **not be allowed to edit “protected”** columns containing important information. In Progen4GL, columns can be unprotected, “**partially protected**” or “**fully protected**”. **You are not allowed to edit “fully protected”** columns at all, but “**partially protected**” columns can be edited by pressing the function key **[F6]** if necessary.

You may also not be allowed to edit or delete “**protected records**” in some cases. **Once a record has been deleted, it cannot be restored.**

Other buttons on the full display screen are clearly labelled to denote functions they serve, except perhaps the **Refresh** button. The **Refresh** button is

used in “multi-user” systems to refresh the screen to display the most up-to-date information. Although, the computer would normally automatically update related screens, some information may not be quite up-to-date due to complex interaction between tables in “integrated” multi-user environment. The **Refresh button can be used to update your local screen whenever required.**

Most command “Buttons” and “Objects” on forms also feature “Tool Tips”, which you can read by passing the mouse cursor over them.

**3.1.4 Web Site** - What happens if you click on the Web Site text box? If there is an entry in this box, you will be asked “Do you wish to connect to the Web site?” If you are logged on the internet, you will be automatically connected to the listed website on clicking the OK button. The computer will display the first page in the Progen WebBrowser for you to surf the web, connect to “Google Search” etc. When you EXIT from the WebBrowser, you will be returned to the previous Progen4GL screen. This facility is very useful for quickly surfing the web for referring to related information on the Internet if required.

**3.2 More on Query Form** – We shall now return to the “query” form discussed earlier. Return to the List of Tables menu, select the Library Catalogue and click the VIEW button. Select one of Search Options to take you to the query form shown on Page 17.

**3.2.1 Wild-card Search** - To select all books for a particular class, you can type first part of Class No followed by a ? for a “wild card” search. For example, 345? will find all books in the class e.g.

345.001, 345.00XYZ etc. The Dewey classification system uses Class No as one of the major criteria for shelving books in the library, and can be used to search for a class or sub-class of books if required.

**3.2.2 Keyword Search** – Each “major” word in Title and Keywords is automatically “indexed” for fast search. All you need to know is a single word in the Title or one of the keywords to find it. All Keyword query boxes display the same pop-up window, but work in a slightly different manner. The 1st Keyword box is like other query boxes and uses the implied “and” logic in conjunction with boxes above it to “narrow” the search. The 2nd Keyword and the 3rd Keyword boxes however use “or” logic and “widen” the search. More keywords will further “widen” the search and the computer will return with more records – just like Internet search engines (e.g. Google).

The important thing to note is that the “search key” must show in the corresponding “query box” for it to be included in the search. Conversely, any data, however trivial, such as an almost invisible . (dot) will be taken into account and the search may fail. All unused query boxes therefore must be left blank

**3.2.3 PicFile** – If you use a short file name e.g. 0020.JPG, the computer will look into the default folder C:\LIBXP\LIBR\BLIST\Pics. If the file is not found there, the computer will tell you so. The image file can however be located elsewhere, and you can see it full size by clicking on the image.

## 4. USER LIST

You must now make some entries in the **User List** before you can try the **Circulation** system. However, do not make too many entries in the **User List** now. **You may wish to modify the Loan Status File before making further entries in the User List.**

In the **List of Tables** menu, click on the **User List** to highlight it, then click on the **ADD** button.

Title of Media	Due Back
Penguin Guide to the Law	10/03/2004
w56 Complete	10/03/2004
C for you are 9	10/03/2004

You should now see the form above, but without any data. The cursor should be in the **User Code** box.

### 4.1 ADDING NEW USERS

**4.1.1 User Code** - Each user of the library system must have a unique **User Code**, made up by a combination of letters and numbers. You can type the **User Code** in this box manually, or **swipe the barcode reader over the User label.**

The computer will not allow you to duplicate a **User Code** inadvertently. If you have typed the **User Code** on the keyboard manually, press the **Enter** key to go to the next textbox.

**4.1.2 Loan Status** - All users are assigned a **Loan Status**, which determines their borrowing rights, whether they pay any fines for late returns or pay charges for using the library. The pop-up window shows a list of **Loan Status Codes** in the computer. Select a **Loan Status** for this user by **double clicking** on the window.

All new systems are supplied with some entries in the **Loan Status File**, which you can use for the time being. To see the “entitlement” for various **Loan Status Codes**, you should **VIEW** the **Loan Status File**. The **Loan Status File** also has facilities to set up **loan charges**, if any. **Fine rates** are set up in the **Media File**. **Loan charges and fine rates can be set to nil for corporate users, primary schools etc. if required.**

**4.1.3 Cut-off Date** – You may or may not have this box in the version supplied to you, and may be left blank if no entry is required. This box is very useful in schools and colleges when students leave at the end of the term. **No transactions except Returns are allowed after the cut-off date.**

**4.1.4 Title, Address, Class, Yr etc.** – Some of these boxes may have different prompts and/or purpose in the version supplied to you. Fill in the necessary information in these boxes and press the **Enter** key to go to the next box.

**4.1.5 PicFile** - Type the name and location of the image file, e.g. **C:\Lpics\James.JPG**, or use the **Windows File Picker to pick the image file**. Use low resolution graphics to save on disk space. If a short name, e.g. **"Keith.JPG"**, is used, the computer will automatically look for it in **C:\LIBXP\LIBR\ULIST\Pics** directory. If the picture is not found, it will tell you so.

**4.1.6 Amount Owed** – You may or may not have this box in the version supplied to you. This text box is updated automatically by the Circulation module and shows total unpaid fines and other charges to date.

**4.1.7 Comment** – Type any comments in this box.

**4.1.8 Items on Loan** – The data in this box is updated automatically by the circulation module. However, it can also be set up and edited manually.

The **User** page also displays a **"multi-line grid"** in which entries appear **automatically**. In the **VIEW** mode, this grid displays **Titles and Due Back** dates for items on loan to the user. This information is derived from the **Library Catalogue** and can be very useful for a quick look at what is currently on loan to the user.

After you have entered the data in the **User List**, **save the record by clicking the SAVE button**.

**4.1.9 User List Customisation** – We are frequently asked to hold additional information in the **User List**. This can nearly always be achieved at a modest cost. Please ask Limrose for a quotation if required.

## 4.2 VIEW USER LIST

**4.2.1 VIEW User List** - Select **User List** from the **List of Tables** menu and click on the **VIEW** button.

**4.2.3 Query Options** - Double click on one of the options in next form to go to the **"query"** screen for the **User List**.

**4.2.4 – Wild Card Search** - Type **?** in the **User Code** box to **"select all"** and click on the **SEARCH** button. After a few seconds, the computer should display the multi-line grid shown below with the records founds for your search.

User Code	Loan Status	Surname	On Loan	Amt Owed	Comments
4 A900008	PUPIL	Jansen	1		
6 A900010	STAFF	Cox	3		
1 A900012	PUPIL	Ingrams			
7 A900014	PUPIL	Chelno	1		
3 A900017	STAFF	Parry			
5 A900019	PUPIL	James	2		

The grid also shows the total number of items on loan and the amount owed. The **User List** is normally displayed in alphabetical order by **User Code**, and can be altered to display, say, by surnames. You can also **"Tag"** records for further selection from the list



displayed if required. If a large number of records are found, the computer displays additional buttons to help you navigate through the records

To look at a user record in “full”, double click the corresponding grid line. To edit the record, click the **EDIT** button. The user record should display **Titles** and **Due Back** dates for items on loan to the user. If you **click on the picture** (if present), you will **see a better image** that can be included in printed reports as shown below.



## 5. CIRCULATION MODULES

Three Circulation modules are available with the Progen Lib system:

**(a) All Transactions** – This is the **optional** combined module for **ISSUES, re-ISSUES, RESERVATIONS** and **RETURNS**. This module can be used **without** a barcode reader and can be optionally supplied for a small extra charge. **Not recommended in use in schools etc.**

**(b) ISSUES only** – “Single function” module specially designed for busy libraries, and **requires a bar code reader**. Items are issued by scanning the

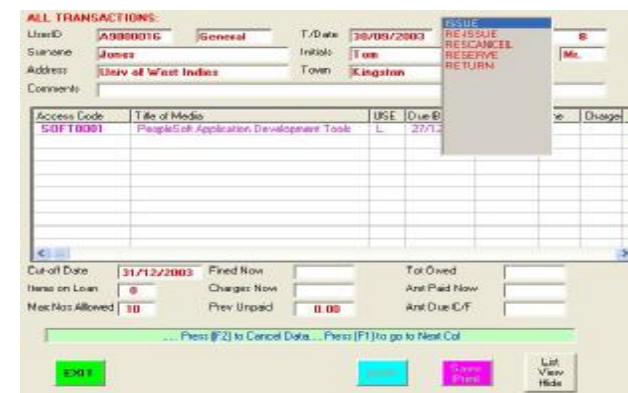
**User and Item barcodes**. This is the preferred module for all “**Self-issue**” systems. **Bar coded User Cards are also required.**

**(c) RETURNS only** – “Single function” RETURNS module for busy libraries. **Requires a barcode reader**. Items are returned to the library by scanning item barcodes. This is the preferred module for “**Self-Return**” systems. **Any one can return books etc. to the library, without requiring a user card.**

**You can open multiple windows on the same PC to run several modules simultaneously, or on separate PC-terminals in a network if required.**

### 5.1 ALL Transactions (if supplied)

Select **All Transactions** in the **List of Tables** menu. Click the **ADD** button for the screen shown below.



Your computer screen may be slightly different depending on the version supplied.



**Very little data is actually keyed-in manually in this module.** Most of the data is either "**read-in**" automatically from linked tables, scanned by the barcode reader or imported by double clicking on the pop-up windows.

**5.1.1 T/Date** - **T/Date** is the **Transaction Date**, usually today's date. However, you can type a different date in this textbox in the **DD/MM/YYYY** format (e.g.12/7/03) if required. Alternatively, press the **Enter** key for today's date.

**Dates must be entered as DD/MM/YYYY in the European version, and as MM/DD/YYYY in the US version of the software.** However, the computer will accept 1/7/3 or 1/07/03 as valid dates and convert it automatically to 01/07/2003 etc.

**5.1.2 User Code** - The cursor should now be flashing in the **User Code** text box, with the pop-up "window" showing some user codes. You can enter the **User Code** by double clicking the pop-up "window" or by **swiping the barcode reader over the User Card.**

The computer will now "**read-in**" user **Loan Status** and other user data from linked tables, and display part of it on the computer screen for you to see.

**5.1.2 Access Code** - The computer will now take you to the **Access Code** box in the "multi-line" grid. The **Access Code** for the catalogue item can now be entered by double clicking in the pop-up "window", or by **swiping the barcode reader over the item label.**

The computer will now read the **Title, USE** code and other data from the **Catalogue and User List. USE** code has the following meanings in Progen Library:

<b>F</b> - Free	<b>REF</b> - Reference item
<b>L</b> - on loan	<b>ORD</b> - On Order
<b>FR1, FR2, FRx</b> etc. -	<b>Free</b> with x reservations
<b>LR1, LR2, LRx</b> etc. -	on <b>Loan</b> with x reservations

As up to 10 levels of reservations are allowed, **USE** code such as **LR7, LR9, FR10** etc. are also valid.

If you wish to **cancel the line** now for any reason, press the Function Key **[F2]** and re-enter the new **Access Code.**

**5.1.4 - Transaction Code (TC)** - The cursor should now be under the **TC** (Transaction code) heading. Valid transaction Codes are **ISSUE, Re-ISSUE, RESCancel, RESERVE** and **RETURN** as displayed in the pop-up window.

**Double click on the required code in the pop-up window.** The computer will now examine whether you have selected a "**valid**" transaction. It will also check for the maximum number of items allowed to the user, the **Cut-off Date**, and whether fines and loan charges apply. It will calculate the **Due Back** date, fines and charges as applicable.

The computer performs these calculations using a complex set of rules using the **Loan Status** and **USE** codes as follows:

**5.1.5 USE code F** – **ISSUEs** are allowed. **Due Back** date is calculated and displayed under the appropriate heading. Cursor moves to the next line.

**5.1.6 USE codes FR1, FR2, FR3** etc., the computer issues the item if the user is *first in the reservation queue*. If not, a message is displayed and the librarian can use the "over-ride" facility to let the user "jump" the queue if necessary. The entry is otherwise cancelled.

**5.1.7 USE code REF** - Reference items are usually not issued, however the librarian can **ISSUE** reference items using the "over-ride" facility if required. The entry is otherwise cancelled.

The **Due Back** date for issues and re-issues is calculated using the assigned loan period for the item (in the Loan Status file) and entries in the "**Holiday File**". If the **Due Back** date falls on a holiday, *it is automatically adjusted to the first working day after the holidays*. The librarian must make sure that the "**Holiday File**" is **kept up to date** at all times. The holiday file is further discussed later in this manual, see section 7, page 40.

**5.1.8 USE code L** – As the item is already out on loan, the **Due Back** date is displayed on the line. Valid transaction codes in this case are **RETURN**, **Re-ISSUE** and **RESERVE**.

When an item on loan is returned to the library, the **USE** code display changes to **F**. Attempt to **ISSUE** an item already on loan will be rejected by the computer.

**5.1.9 USE code LR1, LR2, LR3** etc – These codes mean that the item is out on loan and the only valid transactions are **Re-ISSUE**, **RETURN**, **RESERVE** and **RESCancel**. If the item is reserved now, the user is added to the end of the reservation queue. The computer also then displays user's position in the reservation queue. This package supports a 10-deep reservation queue. **If the queue is already full** (i.e. USE Code is LR10 or FR10), **request for further reservations will be rejected**.

**If you have ordered the optional FINES module**, items returned to the library are now checked for late returns and fine due is calculated. Fine calculations take into account if the library was closed on the **Due Back** date, and adjusts the fine accordingly.

Fine or other charges can be collected now by typing the amount paid in the **Amt Paid Now** box at the end. Any unpaid amounts are accumulated in the user record for future collection. Click the **SAVE** button to complete the transaction and save the record.

**5.1.10 Reservation Queue Management** – When a reserved item is returned to the library, the computer asks if you wish to **print a letter to the first person in the queue** informing him that the item is now back. Printing of such letters can be disabled permanently, or by clicking the "**NO**" box each time in response to the question.

**The librarian can over-ride decisions made by the computer to issue (or re-issue) items irrespective of the status of the reservation queue.** When an item is issued to a user in the reservation queue,

queue entries are automatically adjusted and the queue moves forward by one place.

The **Reservation Queue Management is fully automatic** and no user intervention is required. However, the librarian can edit the reservation queue manually if required.

**5.1.11 Next Access Code** - If the computer accepts the **TC** code entered by you, the cursor will move to the next line for more items to be entered. You can now enter the next **Access Code**, and so on. **Press the function key [F1] to terminate further entries.**

The computer will now display any fines and charges due, which can be collected now by entering the amount in the **Amt Paid Now** box before saving the record by clicking the **SAVE** button.

On saving the transaction record, the **Catalogue, User File** and the **Fines** module are updated automatically.

The **ALL Transaction** module is the ideal circulation system for small libraries where the extra cost of barcoding and barcode readers cannot be justified or is not required. However, such a system has to be operated by a trained librarian, and cannot be used in self-issue/return systems.

## 5.2 **ISSUES only (All Systems)**

Select **ISSUES only** in the **List of Tables** menu. Click the **ADD** button for the screen shown below.

No data is keyed-in manually in this module at all, and all necessary data is "**read-in**" via **the barcode reader. Pop-up menus are disabled.**

The **ISSUES** only screen is shown above. The cursor should now be flashing in the **User ID** textbox.

**5.2.1 UserID – Swipe the User barcode** with the barcode reader. The computer will read user information from the computer and display some of it on the form. The cursor will then move to the first line in the multi-line grid under the **Access Code** column.

**5.2.2 Access Code – Swipe the item barcode** with the barcode reader. The computer will now read the necessary information from linked tables and display

some of it on the first line. **If the item can be issued without any problems, it will be issued and the cursor will move to the next line.**

However, if for some reason the item cannot be issued, the computer will display a message box stating the reason. **No over-rides are allowed and all invalid transactions are rejected.**

**5.2.3 More Access Codes** – The cursor should now again be under the **Access Code** prompt for more items to be issues. **Swipe the item bar code** with the bar code reader again, and so on till you have issued all items to this user.

**Press function key [F1] for the computer to terminate further data entry, save the record and update all linked tables.** It will also open a new **ISSUES** only screen for the next user and so on.

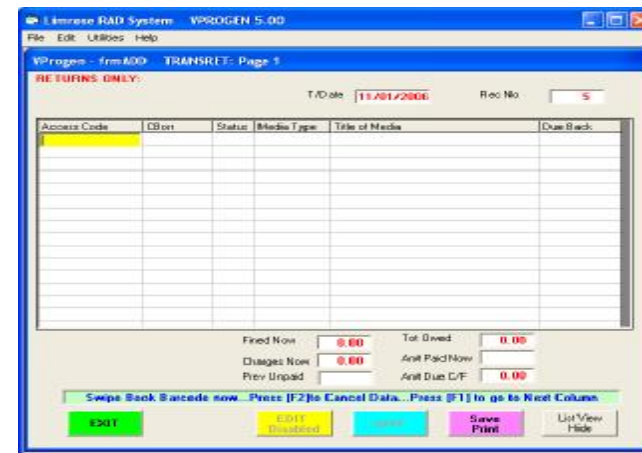
Pressing the function key **[F1]**, signifying the end of transactions, is the **only manual keyboard input** in this module.

This module updates the **Catalogue, User List** and **Fines** modules when the record is saved automatically.

**5.2.4 Self-Issue/Return System** - The **ISSUES** module, in conjunction with the **RETURNS** module discussed in the next section, can be used as a low-cost and efficient **self-issue** system. The **TIME OUT** function (see section 7) must also be enabled for use as a self-Issue system and **Barcoded User Cards and book labels must be used.**

### **5.3 RETURNS only (All Systems)**

The **RETURNS only** screen does not have a **USER ID** box. The only input required is the **Access Code** for the items being returned. **Pop-up menus are disabled in this module.**



The cursor should now be flashing on the first line under the **Access Code** prompt as shown above.

**5.3.1 Access Code – Swipe the item bar code** with the reader to return it to the library. The cursor will move to the Access Code again on the **next** line.

When all books have been returned, **press function key [F1] to signify the end of returns.** The computer will then save all information, update linked files and open a fresh **RETURNS** screen. **If the function key [F1] is not pressed, the computer will automatically save data when the multi-line grid becomes full.**

## 6. MEDIA LIST & LOAN STATUS FILE (if supplied)

The **Media List** table (if provided with the package) should now be edited to meet your requirements.

The **Media List** also includes the daily rates of “fine” for late returns, which can be set to **nil** by leaving the column blank if required. The Media List has only one record. **Do not add new records to the Media List or delete the existing one.**

Similarly, you may find that the **Loan Status File** is acceptable as supplied. However, you can add more records to the **Loan Status File**, and edit or delete existing records to suit your requirements.

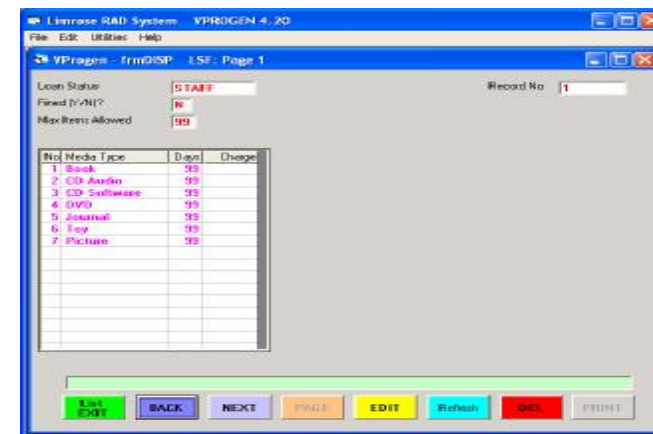
**After the Media List and Loan Status Files have been set up, they should preferably be “hidden”** and not made generally available. Ask Limrose for advise on how to “hide” these files.

**The Loan Status File must have at least one record.**

### 6.1 ADD NEW LOAN STATUS

If you have access to the **Loan Status table**, you can now add more Loan Status if required. **Select the Loan Status table** and click the **ADD** button.

You should now see the **ADD** screen for the **Loan Status table** as shown on the next page, but **without** any data.



**6.1.1 Loan Status** - For each user type, allocate a “unique” **Loan Status Code**. For example, **STAFF** for staff members, **PUPIL** for pupils and students, **UG** for undergraduates, **PG** for postgraduates etc. Each user group is then allocated “lending rights” by adding a record in the **Loan Status File**. The computer will not let you duplicate a **Loan Status** code accidentally.

Type the allocated **Loan Status** code in the textbox and press the **Enter** key.

**6.1.2 Fined (Y/N)** - Type **Y** if this user group will pay fines for late returns. Otherwise, type **N**.

**6.1.4 Max Allowed** – Type the maximum no of items allowed to a user in this group at any time. The computer will **not issue any further items to the user if this limit is exceeded.**

All remaining entries are now made in the “**multi-line**” grid. **You should enter a line for each media type users in this group are allowed to borrow.**

**6.1.5 No** – Type **1** on the first line and press the **Enter** key. The computer will now display Media Type 1 in the next box.

**6.1.6 Days** – Type number of days for which the media can be loaned to the user. It is usual to loan books for **7, 14** or **21** days and other items for shorter periods. Staff can be loaned most items for **99** days, with no fines or other charges whatsoever. Press the **Enter** key to go to the next box.

If users in this group are not allowed to borrow the media at all, enter **Days** as zero.

**6.1.6 Charge** – Type the **daily Loan Charge** (e.g. 0.50 for 50p per day) if applicable and press the **Enter** key. Most libraries do not charge for books, but do charge for DVD's, toys and other media. The cursor will now move to the next line.

**6.1.7 No** – Type 2 now for the next Media, and enter **Days** and **Charge** as applicable. Type 3 on the next line, and continue entries in a similar manner till you have entered **Days** and **Charges** on all lines.

Press Function Key **[F1]** if no further entries are required. **Click the SAVE button to save the data entered by you.**

You can also **VIEW, EDIT** or **DELETE** any existing **Loan Status** codes in the usual manner.

## 7. GENERAL NOTES

**7.1 Access Codes** - You can use **any combination of letters and numbers** for coding catalogue items, or use bar coded labels. You can buy pre-printed bar coded labels from Limrose or other library accessories suppliers, or **can print your own labels using the software supplied**, see section 7.8.

It is important to note that **each copy** of the book, or other catalogue item, **requires its own unique Access Code**. For multiple copies of the book, you must **create a separate record for each copy**. **However, you can copy existing records**, see below.

**Copying an existing catalogue entry** - Enter the **ADD** mode for the **Catalogue** as usual. **Scan** (or type) **the bar code** from an **existing copy of the book** when the cursor is against the **ACC ID** prompt. If you type the item code manually, press the **Enter** key. The computer will then automatically copy the data to the new record, however a pop-up box will warn you of the **“Duplicate entry”**. Click the **NO** button to return to the **Access Code** box. Now, delete the existing **Access Code** and type the new code or **swipe the new barcode with the reader** and continue with rest of the entry. Edit any data on the screen as required and **SAVE** the record.

**7.2 Holiday File** - The holiday file, **TRANS.HOL**, is a **“text file”** which can be edited by the librarian using any good text editor (e.g. Q, EDIT, Notepad etc). Each line in this file lists a date in **DD/MM/YYYY** format (e.g. 11/09/2003) on which the library is closed so that the computer can set the **Due Back** date to



the next working day. The **TRANS.HOL** file can be found in the **C:\LIBXP\LIBR\TRANS** directory in the main computer. **It is very important to maintain the holiday file if fines are to be charged correctly.** Please contact Limrose for advice on updating the **TRANS.HOL** file if necessary.

**7.3 Fines Collected/Written Off** - This is an optional module supplied to schools, college and lending libraries. It keeps track of fines levied, collected or written off. Data can also be entered in this file manually, viewed and printed as required.

Data entered in the **FINE** module updates the **User List** when the record is saved. Please contact Limrose for further details on using the **FINE** module.

**7.4 "Wild-card" Search** - Wild-card searches are allowed in all Progen4GL searches. For example, **Jon?** would find all records for **Jonathan, Jonas, Jones** etc. The **?** must be typed immediately after the relevant characters. **In most cases, the computer also assists you by using its "look ahead" facility as you type.**

**7.5 [ESC] and [F1] keys** - The **[ESC]** key is used in Progen4GL to **"abort"** the current operation and return control to the previous menu if possible. It is similar to the **EXIT** button in most cases. If you press the **[ESC]** key, in the worst case you will lose the most recently entered data. The computer will however ask you to confirm that you really wish to abort now.

The Function Key **[F1]** has several roles in Progen4GL. The **[F1]** key works like the **Enter** key

most of the time, however, it is used to **"terminate" further entries in "multi-entry" columns**, and go to the next column. If you press the **[F1]** key, instead of the **Enter** key, **you can also avoid importing data from the pop-up "window" (thus leaving the column blank) if required.** **[F1]** key is also used to **"Tag/unTag"** records in multi-line grids, see page 18.

**7.6 INDEXing the Library Database** – The library system **automatically maintains all "index" tables** as the system is used. **However, is advisable to re-INDEX various tables from time to time if possible.** **INDEX** tables are used for searching the database and often some **"garbage" is** left behind when records are deleted and edited. Also, if a table becomes **"corrupted"**, it can be restored often simply by **re-INDEXing** it. You can **re-INDEX** a selected table, or all tables in the **List of Tables**, if required.

To re-index, enter the Progen Lib database in the usual manner using the **Supervisor Level** User Code. Then return to the first screen showing the **"Copyright @2002 Limrose Group"**. Click on the database line to **"enable"** the **INDEX/CLEANUP** button. Click the **INDEX/CLEANUP** button to re-index the database and follow the on-screen prompts.

**7.7 SQL, IMPORT, EXPORT** - Progen4GL databases can be **"queried"** using **SQL** and results displayed on the computer or for further processing, such as Export. **SQL** provides **ODBC-compatibility for data exchange.** Using **SQL** external programmes can **"query"** **Progen4GL** and other databases without knowing their internal structure. However, few database vendors support the full **SQL** instruction set,

and often there are minor variations in the versions they use.

**If you have ordered the Resource CD, it will be supplied with full installation instructions.** If you are interested in using **SQL** with **Progen4GL databases**, contact Limrose for further information.

**7.8 Printing Barcode Labels** – You can print your own barcode **Catalogue** and **User** labels with the software supplied. You will require a supply of **A4 Adhesive Labels** (24 labels per sheet) suitable for laser printers. To print barcode labels, **enter the software at the Supervisor level**, click on the **Utilities** (pull-down menu at top of the form), and select **Print Barcode Labels** option. .

Bar-code labels can use a **two-character Prefix** and you can start with any number. For example, you could print bar code labels with prefix **AB** starting from 0001234 by typing it in the appropriate boxes. Type the number of labels required (24 per sheet) and select **Label Type** to be printed.

Print a single sheet of labels first to try, then print more as you require. After printing the first sheet, make sure that **labels can be read consistently by your Bar Code Reader.**

**7.9 Bar Code Readers** – Limrose can supply ready-to-use **CCD** or **Laser Barcode Readers** for use with **Progen4GL** systems. Hand-held barcode readers are available with “**keyboard wedge**” or **USB** interfaces. Both types are easy to use with most systems. Prices from about £100 plus local taxes.

**7.10 TIME OUT function** – In most library applications, the **TIME OUT** function is enabled so that control is returned to the first form shown on page 8 **if there is no keyboard or mouse activity for a pre-set time.** **TIME OUT** time can be set by end-users in 30 second intervals up to 100 minutes. **TIME OUT function can be set or disabled by manually editing the VPROGEN.INI file.** Please consult Limrose for advice and assistance.

**7.11 – Opening Multiple Screens** – You can open and work with **several Progen4GL screens at the same time.** For example, you could open the **User List**, as well the **Circulation/Transaction** screen. To open another screen, click on **START.** Then click on **Programs/Vprogen4GL** to start another copy of **Progen4GL.** Then, connect to the **Library System** and open the **User List**, and so on. **Data will pass between open windows as the library system is used.** You can switch between windows in the usual manner, and re-arrange them on the screen by “**dragging**” them as necessary.

**7.12 Self-Issue Library** – Progen Lib’s “**Single-function**” screens for **ISSUES** and **RETURNS** can also be used for **self-Issue** libraries. Using the single-function **RETURNS** screens, items can be returned to the library simply by swiping the label with the bar code reader. However, items cannot be issued without a valid bar coded **User Card.** **The TIME OUT function should be activated for self-Issue libraries so that the system returns to the first form if left idle for sometime.** The next user must then sign on using a **bar coded User Card and a valid Password to enter the system,** thus safeguarding the library for authorised users only.

**Use of a barcode reader is essential for self-Issue libraries.** Please consult Limrose for assistance if necessary.

**7.13 Changing Preferences** – The software, with the initial settings as supplied, should run on most PCs with a **600x800** screen. However, some **windows may not look right, or buttons not be displayed correctly or at all, if screen or other settings are incorrect.** You can make changes to the initial settings yourself by using the **Utilities/Preferences** pull-down menu. These menus are accessible to you provided you have entered the system at **Supervisor Level (999).** Preference files can also be edited manually if required.

Preferences Settings which you may have to change are (a) **Screen Resolution** (b) **Modem Port No** if you are using the “**auto dial**” or “**auto fax**” facilities (c) **SMTP Server Name** and **SMTP Server Port** if you are sending **Emails** via the **Progen4GL** system. **SMTP Server** details can usually be obtained by contacting your **ISP.** If you have any difficulties, please contact Limrose for further assistance.

**7.14 – User Passwords** – You can assign passwords and access levels to new users, or change passwords for existing users, via the **Utilities/Password** pull-down menu. This menu is accessible to you provided that you have entered the system at **Supervisor Level (999).** Please contact Limrose for further details if required.

**7.15 Printing of Reports** – You can print more reports from the **Progen Library** system by turning

on some of the options. Please contact Limrose if you wish to print additional reports.

**7.16 Installation & Run-time Trouble shooting** – On some PCs, occasionally one or more **.OCX or .DLL files may not register or install properly.** You will find copies of most useful **.OCX** and **.DLL** files on the CD in the **Prog4GL/Support** folder. These files should work with most **Win98/XP/NT/2000** systems. However, it would be prudent to **save copies of your own existing .OCX or .DLL files to be restored if necessary.**

Missing **.DLL** files can be **simply copied to the C:\Windows\System or C:\Windows\System32** folders. **However, you must make sure that a duplicate .DLL file does not exist in your system.**

The missing **.OCX** files must be “**registered**” by your Windows system. To do this, exit to the “**Command Prompt**”, **insert the CD in the computer** and type the following on the keyboard to “**register**” it:

**REGSVR32 /S D:\Prog4GL\Support\XXXXX.OCX**

Then, press the **Enter** key. In the command above, **D is your CD Rom Drive and XXXXX** is the missing **.OCX** file. If your CD is not the D: drive, replaced it with the drive letter.

**The reason for turning off the anti-virus and “fire wall” system when installing new software is that some of the newly installed files are likely to be “executables” (.exe) that anti-virus and firewalls may not recognise as legitimate.**

## 8. SERIALS CONTROL & ACQUISITION

These two modules are separately available and do not form part of the main package. Please ask Limrose for further information if you are interested. You may already have these modules in the "demo" package for you to try. Please contact Limrose for a demo CD if required.

## 9. CUSTOMISATION AND UPGRADES

The **Progen Library** system can be customised to meet any specific requirements at a modest cost if required. To receive upgrade and support after the first 12 months, you must subscribe to the Software Maintenance Agreement. Please contact Limrose for further information.

## 10. LICENSE & COPY PROTECTION

The software supplied to you is "**protected**" against unauthorised copying. Progen4GL executables can be "**backed-up**" for security purposes, but **copies will not run on another computer without a new password**. If the software has to be moved to another computer, contact Limrose for advice. **If you re-format your hard disk, you will require a new password to run the restored system.**

Limrose's software products are covered by the terms in the **Software Licence Agreement**. The important thing to note is that the software is "**licensed**" to you on "**as is**" basis for using it on specified computer(s) for a specified period. **You do not own the software**, and must make sure that unauthorised copies are not made for any reason whatsoever. You must,

however, **make "back-up" copies of the software and data** in all cases for safekeeping as soon as you receive it.

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