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CodeAchi LMS 8.4

MAKING THE JOB EASY FOR LIBRARIANS

USER GUIDE

www.codeachi.com

CodeAchi Library Management System

Release 8.4 User Manual

Document Version 2.0 (User manual version for 8.4 release)
Published on 16th OCT 2021.
Library Management Software with Library Information and Management System

Version 1.0 was published on 15 OCT 2014.
Published by **CodeAchi Technologies Private Limited**.

Published at:
CodeAchi Technologies Private Limited, 1st floor,
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A Sincere Thanks from Author!

I would like to thank you for your interest in CodeAchi product. Seems like yesterday, when we started research and planning for a management software product for library with a mission that can be used by anyone even without having special library science knowledge. Also, keeping in mind that technology should not be expensive. A software is a continual development process in order to advancement in feature and technology, and we take it very seriously. We understand, end of the day this software will be used in a noble cause of spreading education by the organizations. And what could be more important than bringing smile in student's face when they get their book on time without searching it manually in the library. Today, when we are releasing this version, after getting so many reviews from our existing clients, we can proudly say, "Our mission is a huge success!"

I also like to thank all my team and colleagues, without your dedication and hard work it could not have been possible. Specially, to the team who has taken care of the development, management and customer relationship challenges with proper responsibility. I would like to use this medium to dedicate this project towards society and a noble cause of spreading education. Thanks to all our well-wishers who motivated us in both positive and negative way to making this project a reality. Today, when we are releasing this version, I must thank following persons for their un-conditional support to improve our product and patiently waiting when there was time required to develop such awesome features.

1. *Dr.Anjan De, Ph.D* (Library Chairman, **BCRCP&AHS,** Kolkata)
2. *Mr. S.N. Mukherjee* (Head Librarian, **BCRCP&AHS,** Kolkata)
3. *Dr. Krishna* (Head, **SKMHSS**, Chennai)
4. *Mr. Rajesh Khamkar* (US Club, **Indian Navy**, Mumbai)

There was much support provided towards this project in terms of sharing problems by all our existing clients, I thank you on behalf of our company.

We expect the same from our team working with you and let's help each other to make your library a better place for both librarian and your library user. 16 OCT 2015 is a very special day as this is the day we got registered as a private limited company, however our journey was started in 2013. Yes we are crossing toddler time towards being a teen as a company, there is lot more to come and we believe we will get all your support towards the success of this project.

Beside, this is a commercial product, still we have the goal to serve a noble cause. With this product most of the reader will get benefited and also organizations can take proper action for their library efficiently. Welcome to CodeAchi Family! Yes, even if you don't wish to purchase the product we have no objections, as we feel **you are the most important family member of CodeAchi and your desire matter the most to us.**

Thank you again,

Mantu Malakar,
Managing Director,
CodeAchi Technologies Pvt Ltd

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I. Used Terminology

This section of the document is created to introduce some term used in the software or in this document and help you understand the true or alternative meaning of such terms.

- **Item/Items:** Item referred to BOOKS, CDs, DVDs or any other object that will be issued to library user.
- **Borrower:** Borrower are the member, students or the user who will borrow item from the library

II. Implementation Steps (Read carefully & maintain order):

If you are using this software for the first time, these are the steps you follow to get started and feel confident with the software. So follow these steps and you can check their specified guide inside this document.

A. **Download** the Product from official site https://www.codeachi.com/products/codeachi-lms-download)

B. **Install** the product using installer setup

C. **Setup Library** details.

D. Create **Item Category** (Book, CD, DVD etc. Also create Sub Category as need)

E. Create **Borrower Category**(Student, Teacher, Staff etc. Or edit the needed)

F. **Add Borrower** (Student, staff details)

G. **Add Items**(Book, CDs, DVDs etc.)

H. Start **Issue Books** to borrower, also Re-issue or Return.

I. Check **Reports** & Analytics

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1. Introduction

Technology is ever changing, what you see today as an advanced technology that may get backdated within very short period of time. Especially, after the evolution of the computer science and information technology, things are getting advanced very fast and as an organization we must adopt the right technology to stay ahead of our competitors or else we may lose our reputation very quickly. We have taken the responsibility to make our clients stay ahead with technology so they get the best response from their users. We welcome and request you to read this user manual very carefully in order to understand the software and the technological advancement your Library will get after using this software.

1.1 About CodeAchi Technologies Private Limited

CodeAchi where Code helps Achieve solutions! We started our journey in the year 2013, and since then we have grown bigger worldwide with ourproducts and services. We started as an IT and Software development company and helped various different industry with IT and software innovations till then. We got our company -incorporated as a private limited in the year 2015 and got ISO certified from the very same year. Till today we have served clients over 120+ country with thousands of clients. We also have started our project office in London, UK, in year 2016, and very soon we will have multinational depots to serve locally with the very same attitude of remembering client is not our consumers but, they are the part of our organization. Our mission is betterment in technological advancement of the society in multiple industry. Our organization is completely dedicated to ensure you never face any IT related problem in your workplace. We believe in transparency, and our clients love that most.

1.2CodeAchi LMS Basics

CodeAchi Library Management System (LMS) also known as CodeAchi Library is a software solution to manage your library with ease. This software is designed to ensure you can use this software with or without having degree or knowledge in Library Management science. This software have both offline and online module to ensure you get both the facility depending on your requirements. As a librarian or management you need to have a tool that will help you understand your library better. Our software ensure you get all the information of your library whenever you need starting from inventory, usage, and damage of your items beside all borrower and librarian related data.

1.3 CodeAchi LMS System requirement & Specification

This section we will be describing the Hardware, Software and otherprerequisite to run this software application. We have made our software so that flexible hardware support is required to run the application. Please ensure you read this section carefully.

1.3.1. Hardware prerequisites

Mandatory requirements:

A. Landscape Monitor (1366 X 768 Recommended resolution)
B. RAM : 4 GB
C. Processor CS: 2 GHz or More

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D. Hard Drive : 2 GB of free space

Optional Requirements:

E. MySQL database (Online hosted)
F. Barcode Scanner: Any model of any brand is supported
G. Printer: Any A4 Size Laser Printer
H. Barcode Label Printing Sticker (30L, A4 Size) Quantity as per requirement, one sheet of paper can print 30 label sticker(adhesive in back side).

1.3.2 Software prerequisites

Mandatory requirements:

A. OS: Windows 7, Windows 8, Windows 8.1, Windows 10 is supported
B. Framework: Microsoft Dot Net 4.5 is required

Optional Requirements:

C. MS Office any version
D. Adobe Reader or any other PDF reader

1.3.3 Other prerequisite

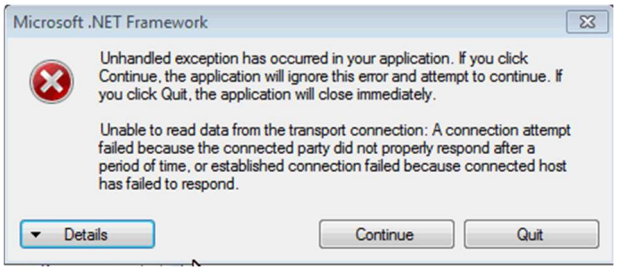
A. Internet connection (During registration of Trial and License also for backup your database in cloud)

1.4 Contributing to CodeAchi

You can contribute with your valuable comments and reviews to make this project more successful. If there is anything you find may help this project feel free to contact us to our email, call, and chat support. You may also share your thoughts on our social media fan pages. CodeAchi always ready to listen you carefully and take action required almost immediately.

1.5 Recommendation for the User

We understand it is difficult to understand the software completely at once. We request and recommend you to contact us if there is any demo is required by our expert so that you can use this software without any hassle. Also it is requested, if you see any kind of error message like following image, kindly copy all text in "Details" and email us the problem at lms@codeachi.com. Also mention when did that error occurred with some screenshot will be great. We are committed to resolve those errors as soon as possible.



One another recommendation will be to check the latest version of this document as we may contribute some changes after taking user reviews of this document to make it more reliable, meaningful and resourceful. You can download the updated software and updated user manual from:https://www.codeachi.com/products/codeachi-lms-download to stay updated with the latest version of the document and software.

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1.6 Resources to learn more about CodeAchi LMS

Beside this user manual, you may also find more resources in our Blog, Forum and in YouTube as video tutorial. Please feel free to subscribe to all medium to keep yourself updated.

2. Problems resolved by CodeAchi LMS

Resolving Library Inspections Problems: Beside technological advancement, CodeAchi LMS is focused to making this software easy to use for everyone. Also keeping in mind the Guideline provided by the Library Congress, so your library will always get loved by the inspection committee from the Board, or Licensing authority of your organization. At the same time your information is in your hand for your use them any time you want.

Resolving Manual Maintenance Problems: This software is also resolving all the problems a manually maintained library can face. A digital solution is very much helpful for taking management decision for your library. Such as, if you identify the book is mostly borrowed and reserved, you can increase the number of copy for that book easily.

Resolving Budgetary Problems: Librarian and organizations often get into trouble with software that is so called open source, due to there is no support service afterword and you are completely on your own with the mistake you have done. Also we have seen Librarian has fall into trap of free software trap knowing the hidden price afterwards. Some program even harmful and designed to steal data. Other are very costly for the organizations. CodeAchi LMS resolves all of this budgetary problems, our pricing is open for all you can see them before you make any decision, and we do not charge you after assessing your budget unlike other available software.

Resolving Difficulties to understand and use: We are very happy that our software are getting complements for being very simple and easy. That's resolves the risk of investing on a product which you may not going to use.

3. Installation Guide

This section will help you install the software, however, we have also included some basic hardware installation guide.

3.1 Hardware Install: As this software basically runs on a single computer, we assume you have the computer ready with recommended specification. If you are going to use this system with barcode support, please plug-in the barcode, and also connect with the printer for barcode and report printing. We also assume, you have the recommended paper for barcode labels printing. You must have Key-board and a Mouse device plugged-in before you start installing this product.

However, if you are using this software without barcode support, you do not need a barcode scanner or barcode label printing paper.

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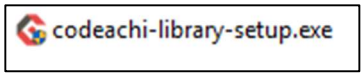
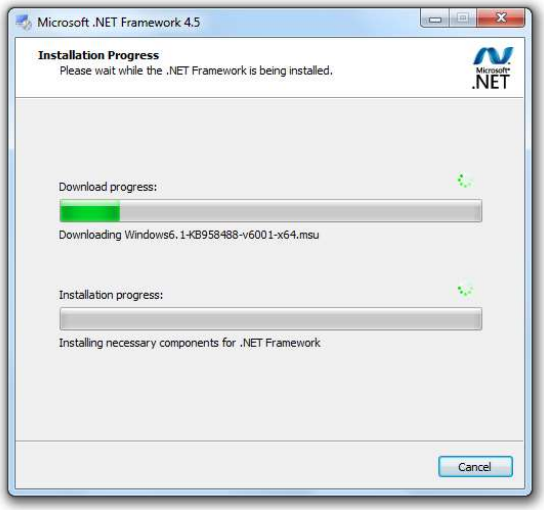
3.2 Start Installing the Software: You can install this software very easily with few basic steps provided by the software installation wizard. Before starting the installation process it is recommended to close any other programme opened.

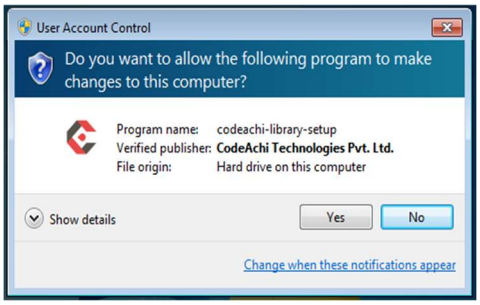
Installing the Dot Net Framework:I assume, you have downloaded the latest product setup file from the official website (www.codeachi.com). Please double click into the setup file to start the installation. In some cases, software may try to install Microsoft Dot Net framework automatically, if your computer do not have the required dot net framework. There is no problem installing the dot net framework, however it may take few more time to install framework depending on your system configuration. Please keep patience while installing the framework.





Follow the Dot net installation wizard to complete the installation. Once the required framework is installed CodeAchi LMS installation will get started automatically. If your framework is not getting installed or having any problems in this part feel free to contact our support team via chat support. You may restart your system and try the installation again.

If you unable to see, Verified publisher sign in the display wile installation starts, please do not install the product. Always be safe by downloading original product from the official website of CodeAchi Technologies private limited (www.codeachi.com).



CodeAchi Technologies Pvt Ltd. is a verified publisher of desktop applications, so you are using the safest product, if you are able to see this sign (Shown in the following picture for your information).

Click on “Yes” to begin the installation. In next screen you will see the welcome message Hit on “Next” button to proceed next. Our version also take care of your update from older versions this enables automatic update of your product.

During installation if you get any kind of error at any stage feel free to contact chat support for quick trouble shooting of your installation problem.

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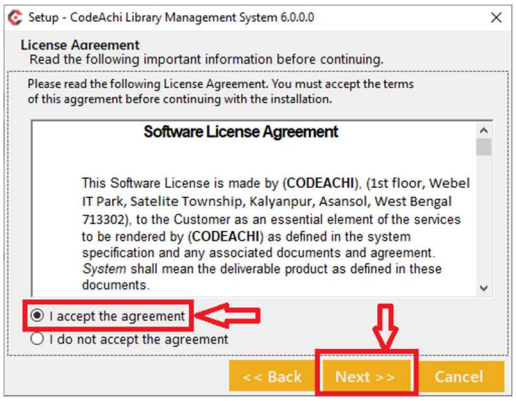
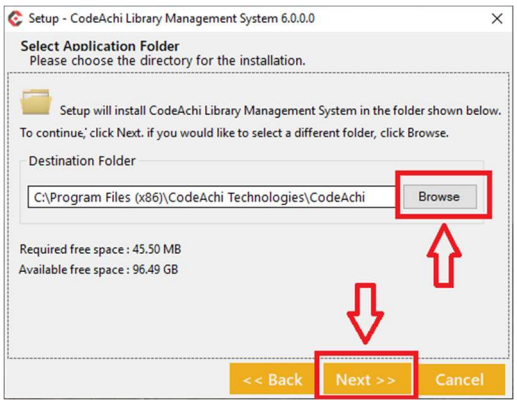


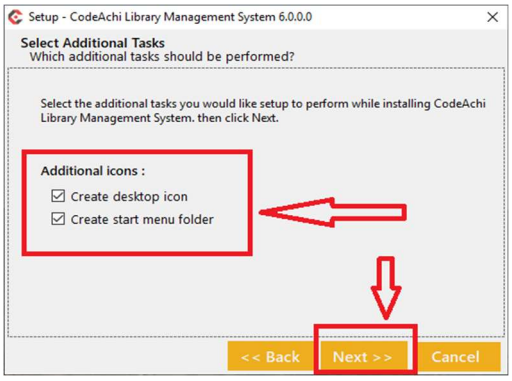
In the next step it is very important to read our license agreement and to proceed you need to accept all our license agreement. Read it complete and proceed if you agree to all, to do that you need to select "I accept the agreement". If you do not accept the agreement, you can cancel the installation.

We believe in transparency, you can use the trial without any limitation for 30 days before you make any decision. Our agreement is that after 30 days trail if you do not want to use the software you need to uninstall this software manually.



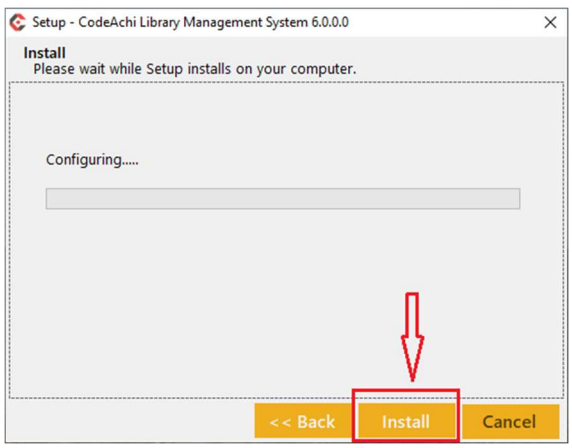
This screen you can select the location of your installation, we recommend to keep this setting as default and click on "Next" Button for next screen. However, if you want to really change the installation location, you are free to do so. By clicking on browse button you can select the desired location of installation for your software.

This also ensure that you have correct amount of space for installing the product, so this screen also shows you the space required to install the product along with space available on the location you have selected for installation. This helps to avoid any space related issues at initial stage.



Now coming to next screen, in this screen you will see the option to install the shortcuts to open the software with product icon. You can use the check boxes to install icons of your desired locations to find the software quickly. You can have two options to decide, to keep the shortcut at the desktop and start menu of windows. You can keep this default and hit "Next" to go at next screen.

In this screen, you are finally installing the required files and configurations, settings and registry to the system in order to let this product work properly in your system. This is vital that you should not shut down computer in this stage. To start installing click on "Install" and let install the product. Please wait while the product is getting installed. This usually takes about, 30 seconds to install, if this taking more than 5 minute contact us.



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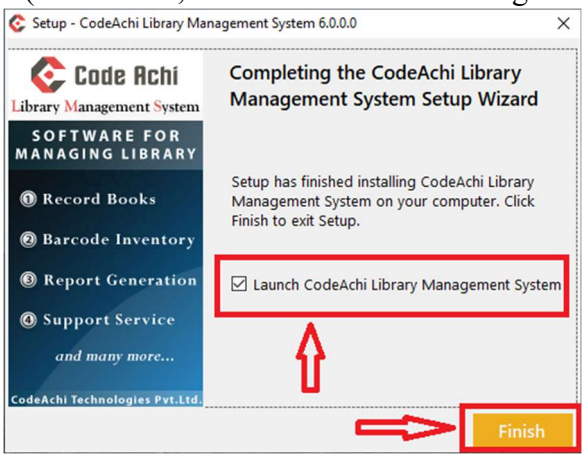
(Also check, Common Troubleshoots guidelines end of this document)



Well, if you are on the next screen, it means you have installed it successfully. Now all you need to do is click on finish. You can keep the check box checked, to open the software directly after finish.

If there is any problem you have faced on any of the above steps, you can check the common troubleshoot section of this document, or you can also contact our support team any time of the day. We take your problems very seriously and we have confidence if we co-operate we can **achi**eve anything with **code**!

3.3 Updating from older versions

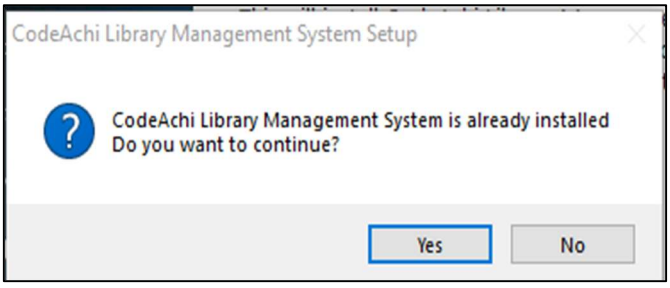
In this section we will learn how to update safely the software, if you are already using CodeAchi LMS in your library. There is two possibilities that you are updating the software from 6.0 or later version or previous than 6.0, as example 5.0. Both have some different upgrade guide line. If you are not sure which version you are using currently, go to **Help->about**, and check the exe version you have currently.

3.3.1 Updating from earlier version 6.0: If you are still using version 5.0 or earlier versions and you have data that is vital to you then contact us as this need manual update by our expert. Do not worry, if you have a valid license this will be a complete free service from CodeAchi.

If you were using earlier version trial, then you can purchase any license to get this service for free.

3.3.1 Updating from version 6.0 and 6.1: This should be easy to do it by yourself. From version 6.2 we have also enabled automatic update feature so that you do not have to worry again where there is an update available for this software and software will update automatically. To update the software from version 6.0 and 6.1 download the latest installer from the website https://www.codeachi.com/product/library-management-system/download/ and start installing it.

Only one thing to make sure that you do not lose your data, and you can able to use the latest version. So, two screen I will share here, those are important for updating your software using installer program, rest are pretty same with installation guide.



While you start the installer, it will prompt you that you have CodeAchi LMS installed, and you want to update it? Click "Yes" to start updating the software.

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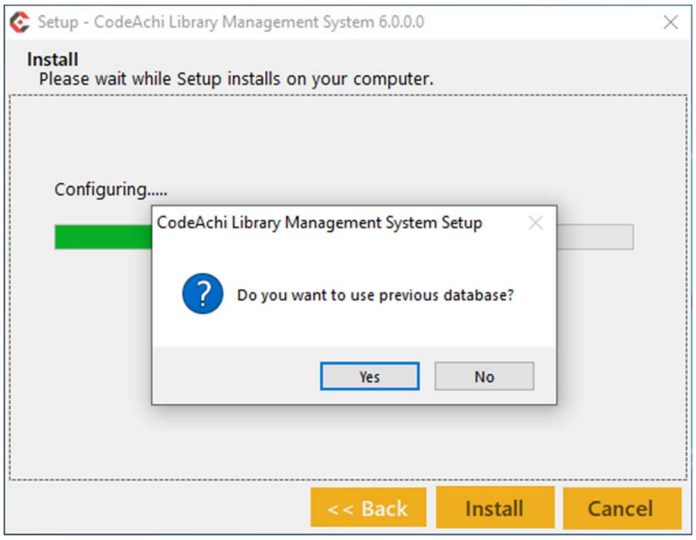
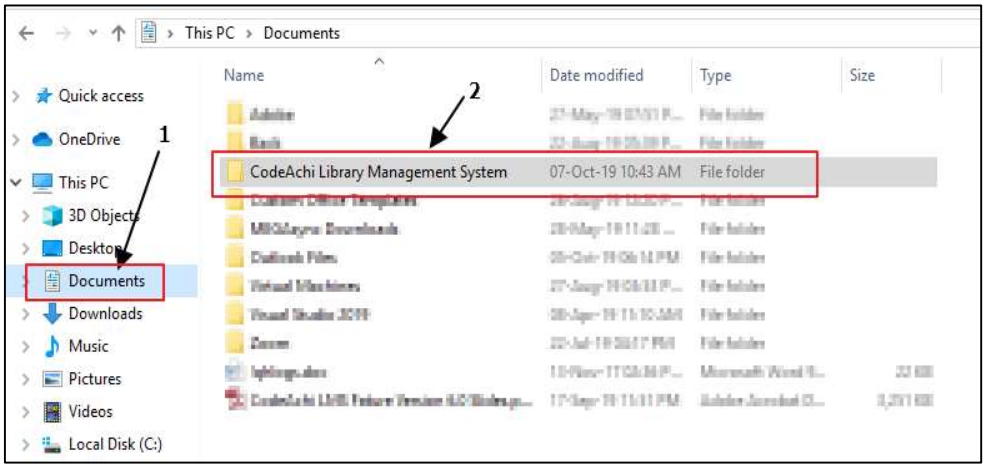


Just follow the wizard as mentioned and installation guide. The next screen is you need to take care when software will ask "Do you want to use previous database?" click on "Yes" to make sure you do not lose your data.

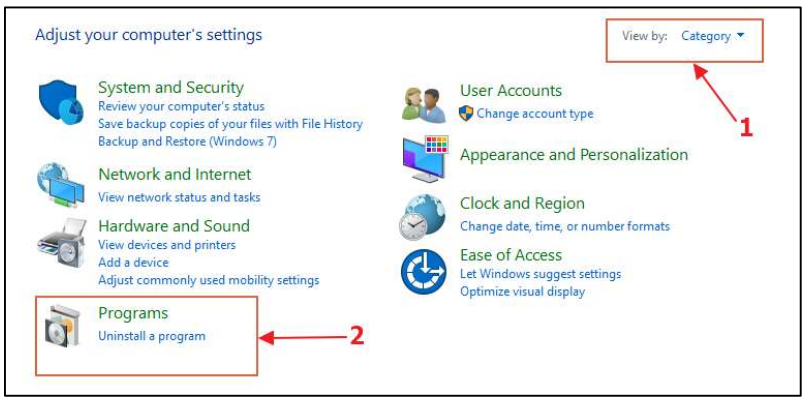
Alternatively, you can keep backup of your database location manually to avoid any problem. To do it, go to Documents->CodeAchi Library Management System folder from windows explorer and keep a backup of this folder by copy it to another safe location in your computer.

This is the default location of your database, however if you have alternate the location of your database please do keep backup of that location to avoid any technical problem of losing your data. If you are not able to find out your current database location please go to Setting-> database setting and check the current database location from the software menu. Follow the rest of the wizard to complete the update of your software.



If you see the login screen after opening the software, meaning you have safely updated the software without losing any data. If you see one time setting wizard again meaning something went wrong and this will be a fresh database. If you see error message of any kind after upgrading the software feel free to contact our support team. Do not worry our team will surely help you.

3.4 Uninstall the product from your PC: Uninstallation support has been provided during the install of the product, as a user you are free to uninstall the program anytime.Go to your control panel and Installed product list. Select view by Category to find uninstall program link, click on it. Please see the screenshot for



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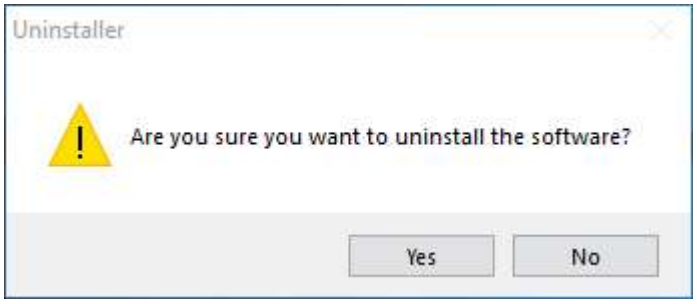
better understanding.

Find the CodeAchi Library Management System program from the list and right click on it to find "Uninstall/Change" option, click on it.

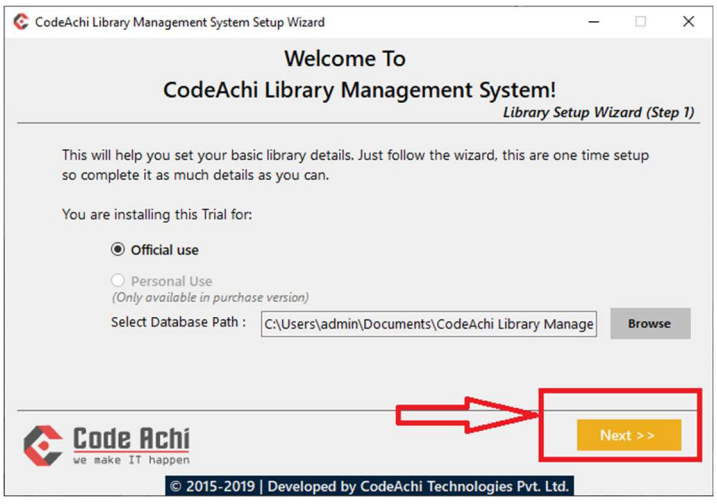
Software will ask for confirmation if you really want to uninstall the software, Click "Yes" to continue uninstall. Hit "No" if you have changed your mind. If you click "Yes" Software will get uninstall instantly. However, for your data safety software will not delete the database location. You can delete it manually as you already know the location of your database.



We are sorry to see you go, it will be a great help to us if you take your few moment and tell us the uninstall reason at the end survey. Link will be automatically opened by the software using your default browser. Your reviews makes our product more reliable, and we thank you in advance for your comments. If there is something bad about us feel free to be rude and tell us. We know Librarians are sweetest people and we have very positive response from our team to work with you.

4. One Time Library settings

Well, hopefully you have able to install the software. If you have installed it for the first time, you will see a wizard to set your library setting and protecting admin account with a password. This software assume if you are installing it, then you have the right to set admin account, and this facility is only available for the first time and this is just one time setting, which you do not have to do it again and again. So keep patience at this stage.



The very first screen will ask the purpose of your use, being a Library software it's always open in official mode. Even if you are using it for

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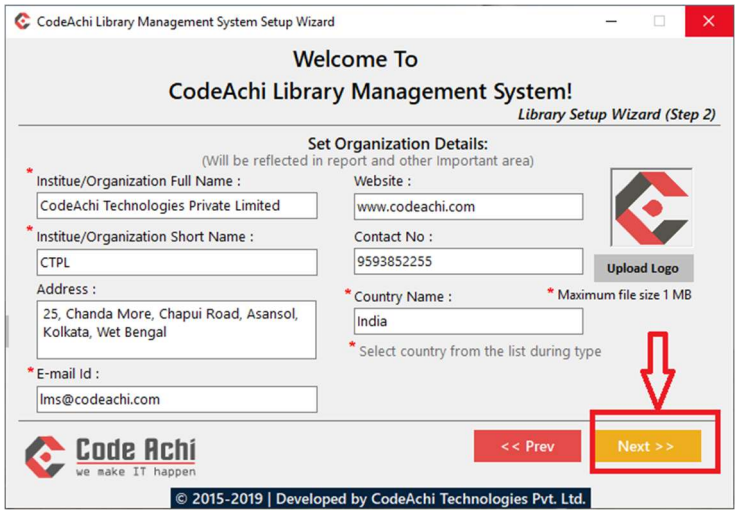
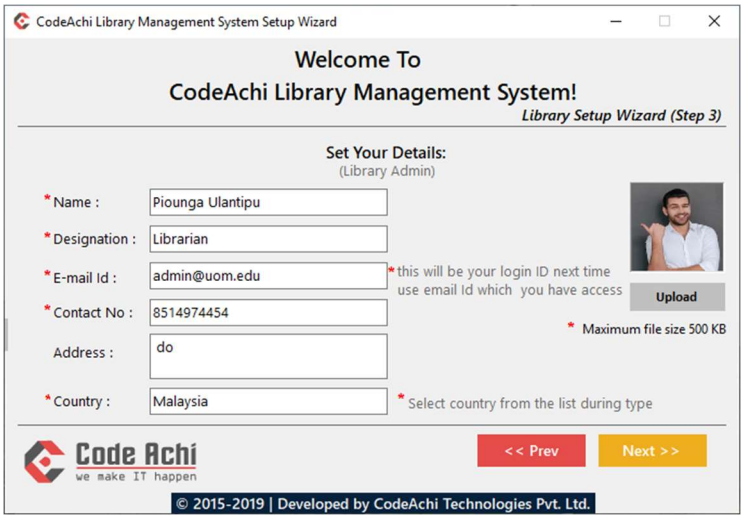
personal use keep it default. Now you can select database location, as you may be setting this PC as network computer and want use as another station for your librarian in library using LAN (Local Area Network).

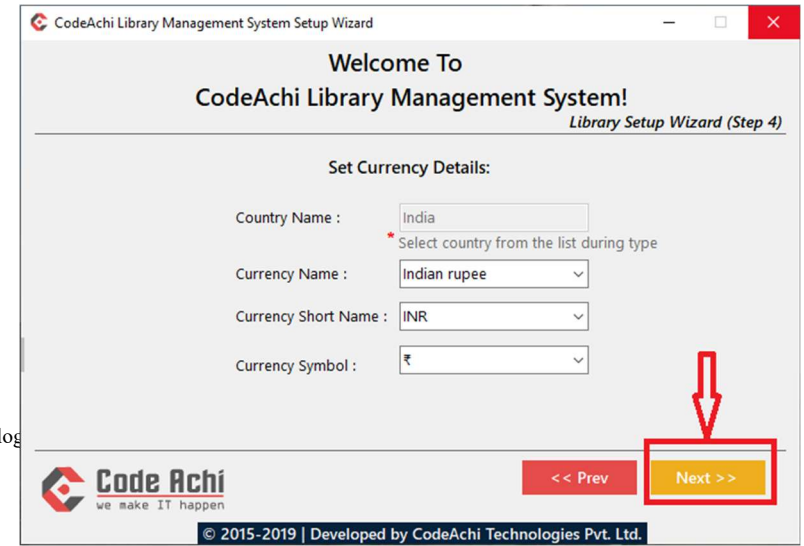
4.1 Set Your Organization Details: This is the setting of your organization details. This data will be reflected on Barcode you will print, Reports, and also in some important places. And it is also important providing correct data to the software to activate your trial. Email and SMS verification will be sent to validate the data you provide. Our system can also automatically block if there is any data provided is suspected invalid. If you get blocked, you cannot able to use the software further. Contact our support if you think you were blocked by mistake with your installation details. Only thing you need to ensure is you have to select the country from the list, avoid any mistype of your country else system will automatically block you.





4.2 Set your details (Administrator): As you will be the administrator CodeAchi LMS ensure you get all the options you need as an administrator of this system. To make sure you use your email as this is going to be your login ID from next time. Also make sure to provide all valid data else system will block your trial automatically (this is part of our agreement). Put all data required by the system and click on "Next".

4.3 Set Currency Details: Now next setting you need to do is currency setting. If you have selected your country from the list then, software will automatically set your currency details. But you can change it if you wish to. This currency is the default currency for



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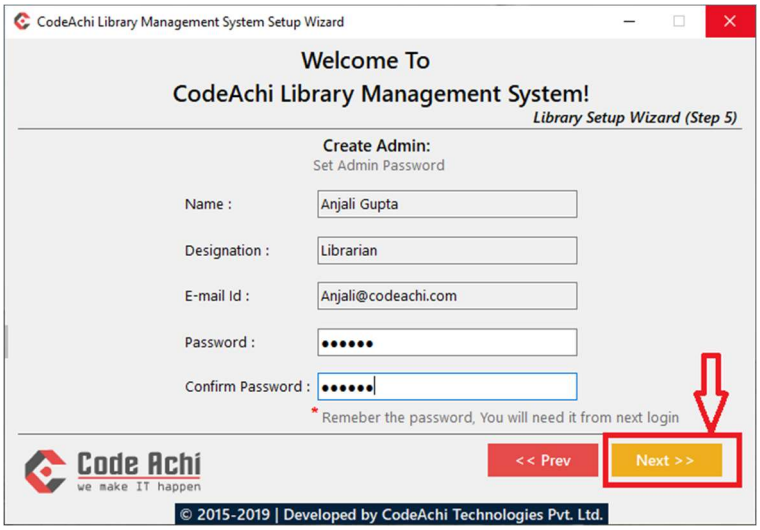
collection of fees and fine or other payments from the borrower. Click on “Next” to load next screen.

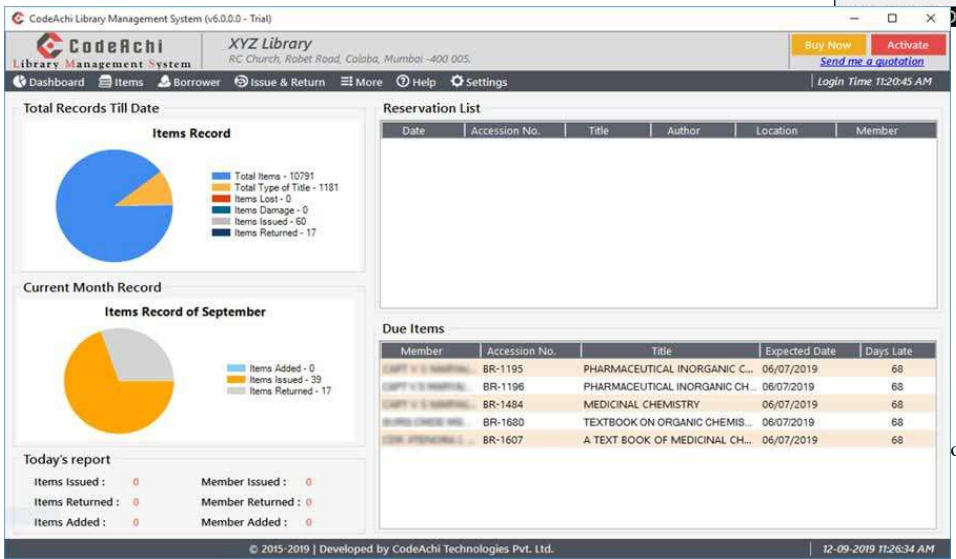
4.4 Set Admin Password: The last setting you need to do is set your admin password for future logins. Please make sure you remember the password as we will have no access to your password. If you lose your password only support is we can give is deleting admin account and let you create it again.



Hit “Next” and you will be logged in to dashboard as admin. If you quite the software and re-login you need to authenticate with your admin login details.

Login screen will require your email and password, and if you create multiple librarian accounts they need their own email and password to login. Here is the screenshot of login screen. Once you are successfully login you can see the dashboard section. We will now be discussing the dashboard section in details.

If you are not able to login or system indicating that your password or user id is invalid then make sure you are entering it correctly and your caps lock is not activated. Feel free to contact our support anytime you need.



5. Getting started with Dash Board

Once you are logged in you will see

the dashboard at the first place, and we have make sure you get the all information that you may require from your dashboard. In the left side you can see the total records in chart. There is for Today, This Month and all time variations. At the same time you can see List of reserved items and the member who done the reservation right top grid. Also in bottom right grid you can see the overdue items, which were not returned on or before expected date. This will help you see the both reservations and overdue items with required info as soon as you are logged in to the system. Generally this screen loads fast, however depending on your data it can take some extra few seconds if there is huge data (More than 10 thousands in the Due or reservation item list).

6. Important Four Step

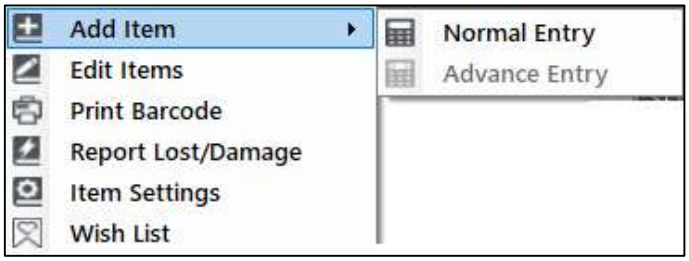
You can jump in and do whatever you want, but our recommendation will be to first complete this 4 step before going forward. And please make sure to read detailed guide for how to do this safely. Please do it step by step:

6.1 One time Item settings (You can find detailed guide bellow)
6.2 One time Borrower setting (After Item setting is done)
6.3 Add Items
6.4 Add Borrower

7. Menu options and shortcuts

Now let us get introduced with the menu options you get from the software with their basic function. We will learn them one by one in details later including the feature they provide on the interface, but in this section we will have an overall idea about the available menu and their shortcuts.

7.1. Dashboard: This menu is for dashboard, so when you click in this menu you can see the dashboard.



7.2Items:you can find all Item related options right here. Item menu help you add your books, CDs, DVDs or any other item you have for your library.

7.2.1 **Add Item:** As name suggest you can use this menu when you want to add **Books, CDs** etc.

7.2.2**Edit Item**: This menu is specially designed to edit/ delete your existing multiple items from the software at once.

7.2.3 **Print Barcode:** This menu lead you to the barcode printing interface. You can able to print barcodes for your items (Books, CDs, and DVDs) from that interface.

7.2.4 **Report Lost/Damage:** This menu will open the interface to put lost or damage information's of your books or items. You can report a single item or multiple item at once.

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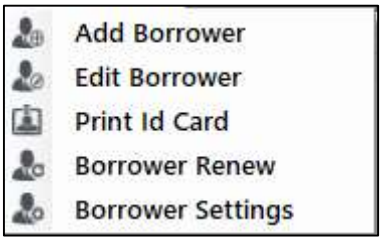
7.2.5 **Item Settings:** This is one of the most important menu and this is to control access of your items from the borrower, also you can categorise your items as per your need. You can also give your desired and required filed names for your catalogue.

7.2.6**Wish list:** This menu will lead you the interface where you can add wish list for the items as per enquiry made by your borrower.



7.3Borrower: Using this menu you can access to all borrower (Student/Member) related interfaces of the software.

7.3.1 **Add Borrower:** This menu help you lead to the add borrower interface.

7.3.2 **Edit Borrower:** You can use this menu to bring interface where you can edit, delete multiple borrower at once.

7.3.3 **Print ID card**: You can print ID cards or even only barcode sticker for library ID of your borrower.

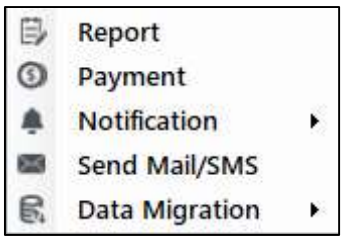
7.3.4 **Renew Membership:** You can use this menu to bring interface where you can renew membership for your borrower.

7.3.5 **Borrower Settings**: This is also a very important menu just like Item settings. You can give access to an item category you have created to the borrower, and you can create multiple borrower category depending on their restriction.

7.4Issue & Return: This is perhaps going to be the mostly used menu. Under this menu you can manage your circulations.

7.4.1 **Issue Item**: This is the menu which will bring up the interface where you can issue items to the borrower.

7.4.2 **Return & Re-Issue**: This menu will help you return and re-issue of your items from the member.



7.5 More: You can find some useful menu under this menu.

7.5.1 **Report:** This menu will bring up the report generation interface. There is multiple type of report you can generate, print and save as CSV/PDF files. Once you will see the all report that you can generate you will love this system.

7.5.2 **Payment:** This menu will bring up the payment collection and invoicing interface. This is basically record the amount paid or remitted by librarian.

7.5.3 **Notification:** This menu is designed to send multiple notification manually to your user using email and SMS.

7.5.4. **Send E-mail/SMS**: This menu help you set SMS (Text message to the contact number) email settings with templates.

7.5.5 **Data Migration:** Under this menu you can bring up the interface for migrating data using excel sheet. This is helpful when you are migrating from another system and want to put multiple data at once.

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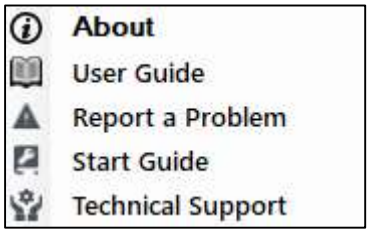


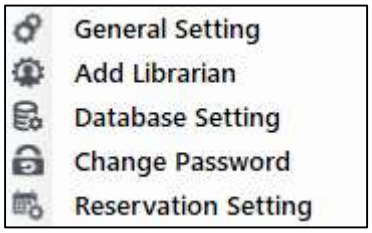
7.6 Help Menu: You can find the help related option and interfaces from this menu.

7.6.1 **About:** You can use this information to know the details of your installed product, if you need help from our support team they might ask for the related info.

7.6.2 **User Guide**: This is the menu that will probably bring up this document in your default PDF reader.

7.6.3 **Report a Problem:** You can use this menu to report a problem that occurred to you to our technical support right from your software.

7.6.4 **Technical Support:** You can also ask for technical support over skype, Call or WhatsApp directly from your software. And schedule a meeting to resolve the problem by our dedicated support team.



7.7 Settings: Under this menu you will find all setting related options. Basically all access to this area is provided to the administrator only. However, a librarian will also have some partly access to some setting options.

7.7.1 **General Setting:**You can set the library details from here also, which we already did during the installation of the product. If you want to change some of them now, you are free to do so.

7.7.2 **Add Librarian:** This menu will bring interface where you can add multiple librarian and also restrict their actions to the system.

7.7.3 **Database Setting**: This menu will help you set you database location. This is where you can also set backup location and time for taking automatic backup. You can also restore database using this interface as well.

7.7.4 **Change Password:** You can change your current password using this menu.

7.7.5 **Reservation Setting:** You can Setup your reservation rule from this menu.

7.8 Search & Lookup: This Menu designed to quick trace of your item or member data. This option could be helpful to quickly find the location for item or member data.

8. One time Item & Cataloguing Settings

8.1 understanding "Item Setting": This is the first job you need to do after you successfully install the software. This is most important and one time process. But before you start you need to do few manual things in your library. First, organising your items books, categorise them, also make sure you have store them in a proper rack/ shelve. Give your rack a number to identify them quickly latter, like A1, A2, A3 can be 3 different rack number on same column.

If you are adopting computerise system for the first time hope this are already done. You can use any categorise method of your book and set the setting in CodeAchi LMS.

Using this feature, you can categorise your item, create sub-category of item, set default issue period, set fine per day for the sub category of your item, also you can set fields for the catalogue setting. Basically a category is a type of your item (Books, CDs, DVDs, and Journals

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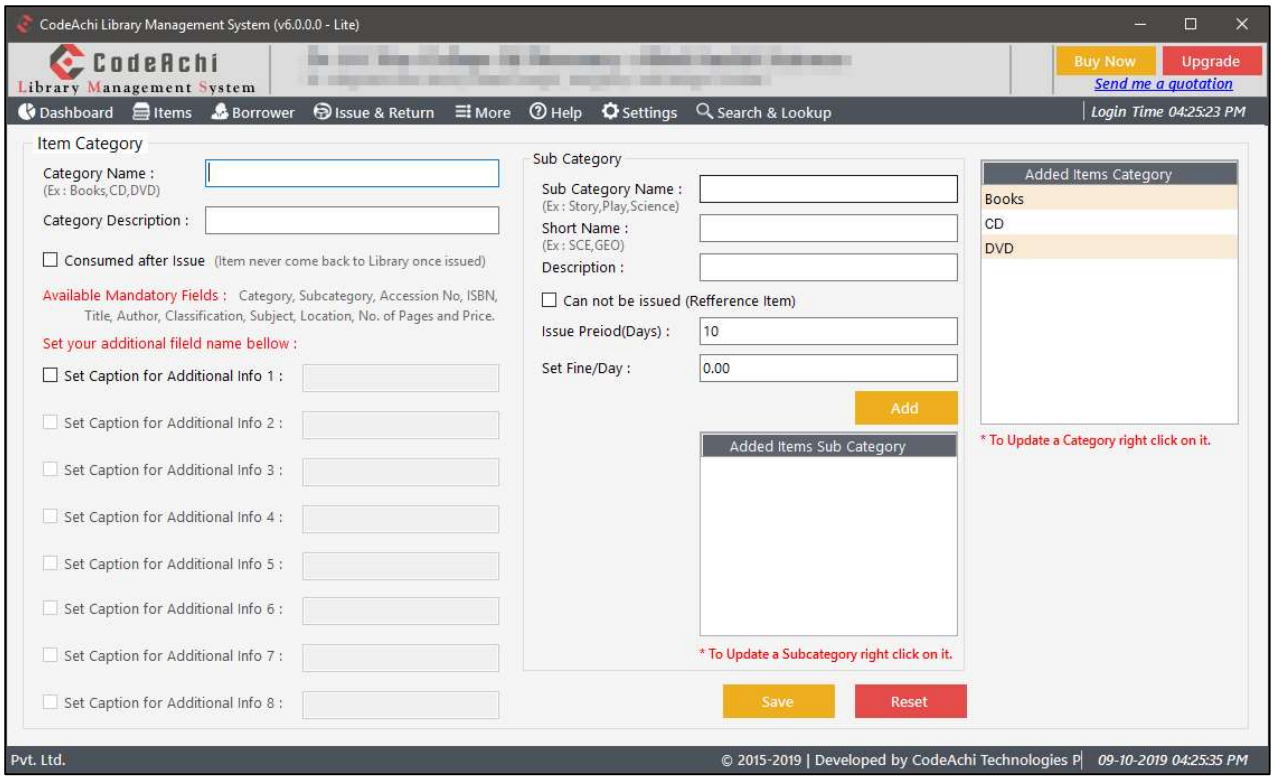
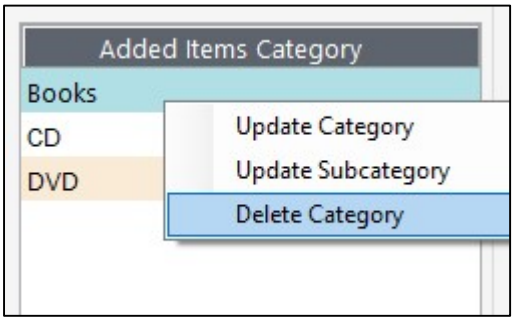
etc.) and sub-category is the category under an item. As an example, If Book is your category then, Fiction, Non-fiction, Children, Text book are be the sub-category. You can create category and sub-category as per your need, we have kept it flexible so you can set as you need them.

To start the process go to **Item-> Item Settings** from the menu.



For your help we have added 4 category by default, if you want to change them you can delete or edit them. But first we will learn how to add a category of item.



8.2 Deleting an existing Category: As we have added 4 default category you may don't like it, and want to create it from fresh, as that will give you more control over how you want to create category or sub-category. To delete a category, "Right click" into the category and hit "Delete Category" and confirm with "Yes". Remember, if you delete a category then all books/data under this category will lost forever, take action carefully.

8.3 Update Category: If you want to update on category right click into the Category and then click on Update Category. You can now set field names or alter them. But if you want to add or remove sub-category under any category see the next point.

8.4 Update Sub-category: to update a subcategory same right click on the category you want to change the sub-category of then add, or remove from the sub-category list and hit "Update". If some field got blocked please hit "**Reset button**" and try again.

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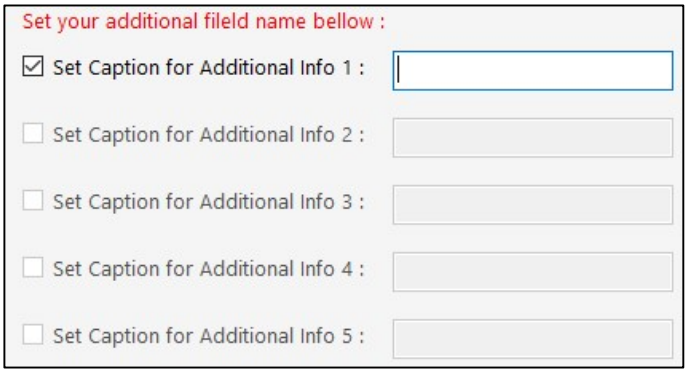
8.5 Adding New Item Category: Adding a new Item category is easy. I will take Book as item category for this example (although it was added already, you can delete that if you want to do it from fresh, to delete right click on "Books" from "Added Items Category" list right hand side).

Now put category name "Book", category description, check if your item consume after issue (Like a category may can be consumed and do not return back).

Now, any category you add to the system there will be some field name by default, they are: Accession Number, ISBN, Title, Author, Classification, Subject, Location, and number of pages. Only Accession number, title and location is mandatory to provide during item entry.

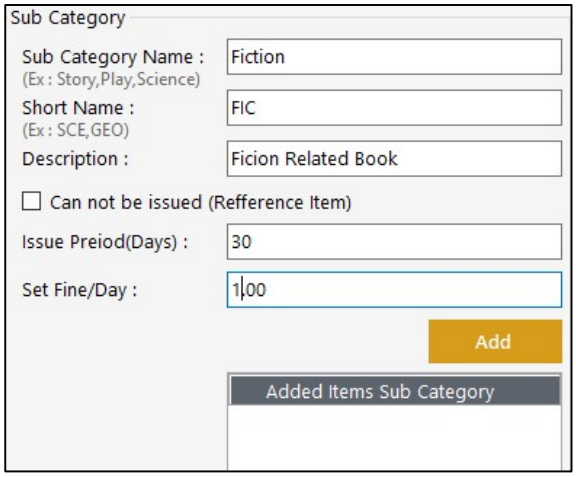
Set Caption for Additional info 1: Check and Give filed name you need for your item, in my case I will give "Description". So when you will be adding items (Book in this case) you will have a field named as "Description".

Set Caption for Additional info 2: Check this box and also set the caption, I will set "Supplier Name" for my case.



You can set them all, up to 8 flexible field has been given which you can set as per your need. Very next part is to create sub-category, you can now add sub-category of the item you have created. Let us try to understand it with an example, under book category you can create sub category of Fiction, Non –Fiction, and Children etc. By doing so, you can control access of a sub category like their default return days, Fine per day, reference category or not etc. Not only that, you can also choose which borrower can access a particular sub-category or not. As an example, you can limit student of Class V not to access Fiction sub-category books. You can do this during creating borrower category, we will learn later.

To create Sub- category give a Sub-category name, 3 character short name, a description if you want to remember about this sub-category. I will give "Fiction" as Sub-category name, "FIC" as short name, and "Fiction Related Books" as description. As this category is not a reference category I will not check the "Cannot be issued" check box. I will set 30 as issue period, meaning the books under this category must be returned within 30 days to avoid fine/penalty charges. I will set 1.00 unit fine per day after due date. Now, if you have set your default currency this is the unit of the charges. In my case, "USD". Now click on "Add" button to save the sub-category to the list.



You can create as many sub-category you want with their unique fine and return date setting.

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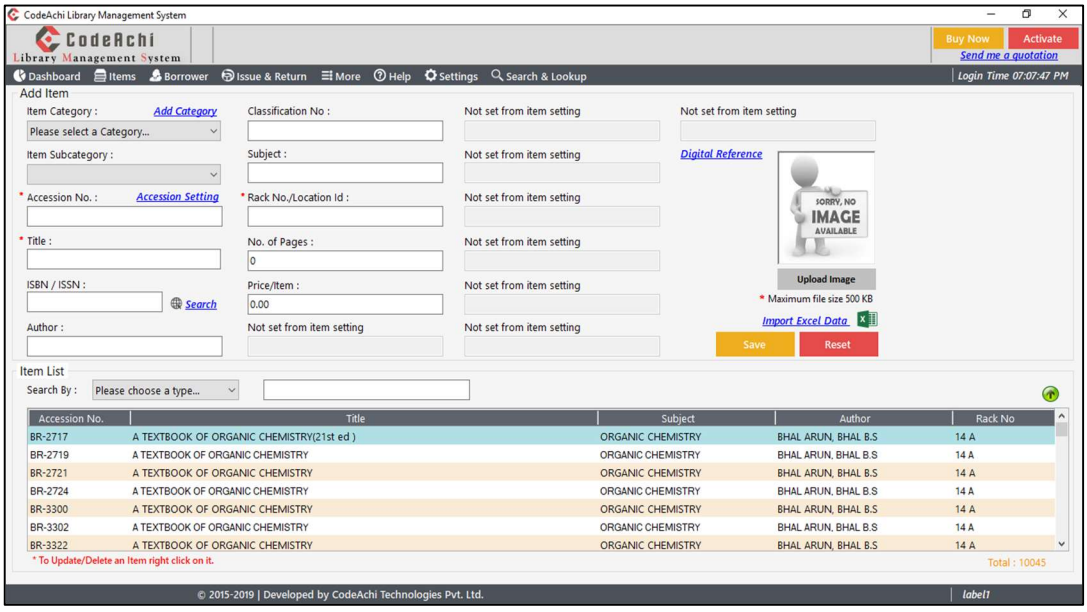
Once done with all your sub-category finally I will click on "Save" to create this category of BOOK with all my desired sub-category.

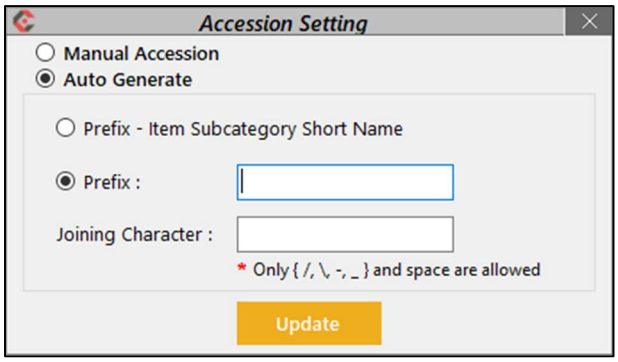
You can similarly create as many category as you need. This are one time job and you have to take care this very rarely.

9. Add Books, CD, DVD or any other Item to your inventory

Earlier, we have learned how to categorise your items. We have also created item category such as book, CD, DVD etc. In this section we will learn, how to add item details to the system. Adding your item is data entry and that can take time if you are doing for the first time, however there are few tricks you can learn to make it quicker. Also if you have your data in excel spreadsheet you can also use them to enter them at once together. Let us first see how to enter item one by one. Go to **Item->Add Item-> Normal Entry**to bring add item screen.



9.1 Accession Setting: If you are visiting this page for the first time system will automatically ask for Accession number setting. Accession is the most unique ID for your item, and this is what will be the barcode for the item to identify the item when you scan the item with barcode scanner. An accession number cannot be duplicate, so software will automatically ignore if you try to enter duplicate accession number for more than one item. Software will ask to let you set your accession numbering preference. There is basically two setting you have as options.



9.1.1 Manual Accession: if you want to put accession number manually, as you may already have a Book ID or accession number previously and you want to use them. To keep it manual, select "Manual Accession" and click in update.

9.1.2 Auto Generate: If you want the software auto generate Accession then you may want to select this option. If you select this option, you also need to set Prefix and joining character with numerical portion of your accession number. You can prefix "Item Sub-category short name"

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or any other 3 digit character of your choice. You can join character with numerical portion using either "/,\, -, _," this four symbol. Select "Auto generate" and put other required and hit "Update" to use auto generate method.

You can always change your current accession setting by going to "Accession Setting" link in the same page.

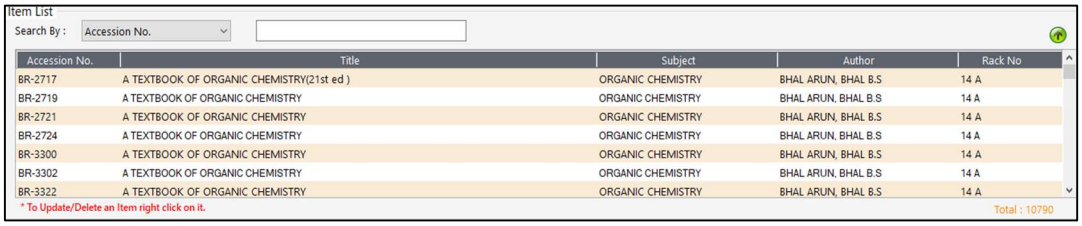
9.2 Add Item: To add an item, first select the category of the item, then depending on your category will load up the sub-category, select sub-category from the list. Depending your accession setting software will generate the accession, but if it was set to manual then put the accession number of the item. Put Title, ISBN, Author and other data as you required. Remember to put rack number always to find the book location easily later on. You can also set picture of the item as well, you can set from computer, scanner or even using a webcam.

Now, when you are putting the same book, while typing the title it will auto load the data. Also if you are putting the same ISBN later it will auto load the data and you can change the necessary portions and save time for putting the data again and again.

9.2.1 Item data using ISBN from Internet: Yes, you can also use internet and ISBN to bring the catalogue data automatically. After putting the ISBN in ISBN field click on search to find the details from internet.

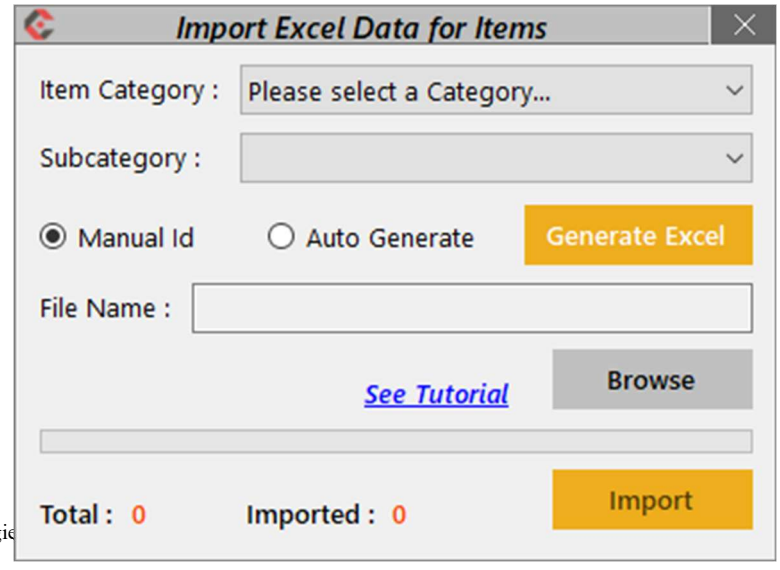
Hit on "Save" to save your item to the system. If you have successfully added the item a message will be shown, also you can find the added book/item in the list below.

You can also search by fields and also see the total item in the same screen.



10. Adding Items Using Excel Spreadsheet:

You can add item(Books, CDs, DVDs,) using excel sheet, as adding multiple item at once is very convenient way to change your older system. Make sure you have MS office (2007 or above version) installed to use this feature. To enter data using excel you need to format the data as required by the software. I assume, you have a excel file with all data. Now in-order to insert first you



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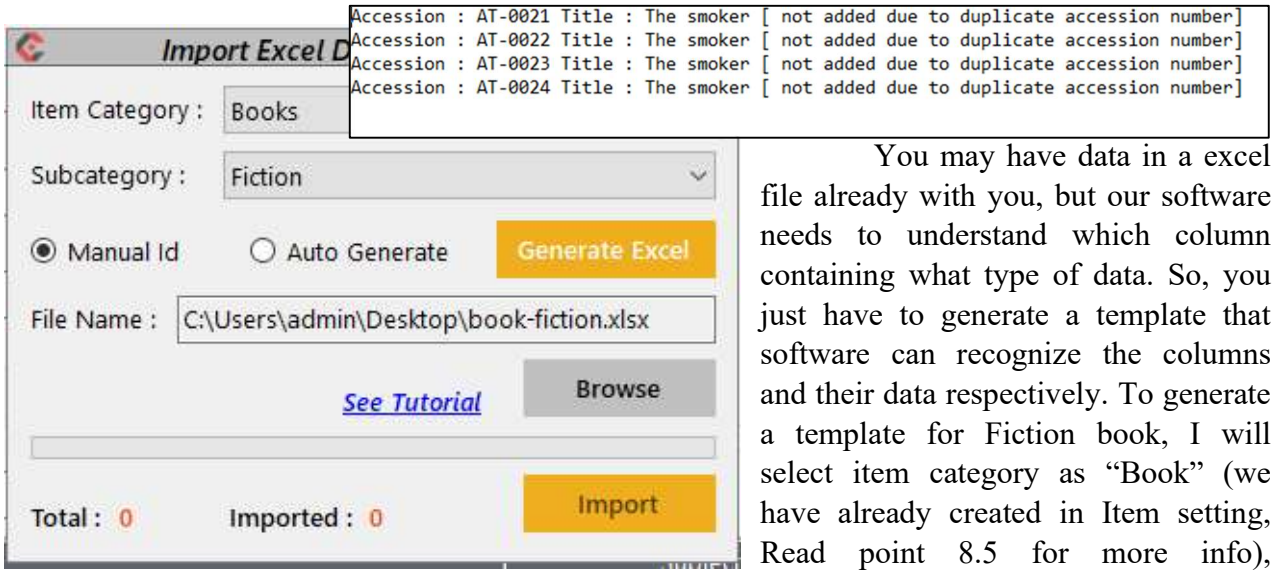
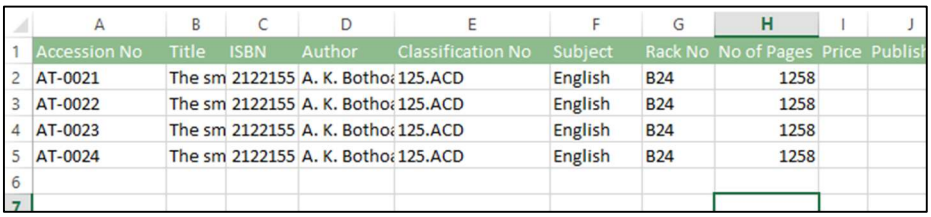
need to generate excel formats for your entry. Go to Add Item (Normal Entry) page from the menu. Alternatively, you can go to **More-> Data Migration -> Item Data** as well. Now on this screen, you need to first generate template for the item you want to insert. I assume you have already done the one time Item settings already. As example I will be inserting all fiction books using excel.



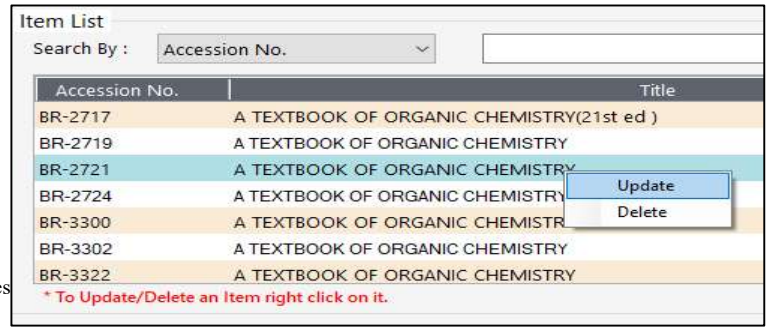
You may have data in a excel file already with you, but our software needs to understand which column containing what type of data. So, you just have to generate a template that software can recognize the columns and their data respectively. To generate a template for Fiction book, I will select item category as "Book" (we have already created in Item setting, Read point 8.5 for more info), Subcategory as "Fiction" (created already in Item setting under Book,Read point 8.5 for more info). Now I will select "Manual accession ID" you can also select "Auto generate" That will generate Accession automatically during insert. Click on "Generate Excel", that will generate excel file as per name given by you with some required column name. Now, put all the data to excel according to the column name, and save the excel file. Come back to the software and make sure to select exact same Category and sub category you have prepared excel for. Browse the excel file and click on "Import button". This will import all data from excel file, and will show you the progress in the progress bar. After complete insert of the book, you can also check a log file in the dashboard if there is any item was not added due to any reason. You can do the same for all other category or subcategory of items you have.



	A	B	C	D	E	F	G	H	I	J
1	Accession No	Title	ISBN	Author	Classification No	Subject	Rack No	No of Pages	Price	Publis
2	AT-0021	The sm	2122155	A. K. Botho	125.ACD	English	B24	1258		
3	AT-0022	The sm	2122155	A. K. Botho	125.ACD	English	B24	1258		
4	AT-0023	The sm	2122155	A. K. Botho	125.ACD	English	B24	1258		
5	AT-0024	The sm	2122155	A. K. Botho	125.ACD	English	B24	1258		
6										
7										

11. Edit or Delete Existing Book or Item data:

11.1 Deleting or editing item one by one: You can edit or delete items one by one right from the same screen of add Item. To delete or edit an item right click on the item from the list below. You can search the item or find by scrolling to the item and right click into the item to



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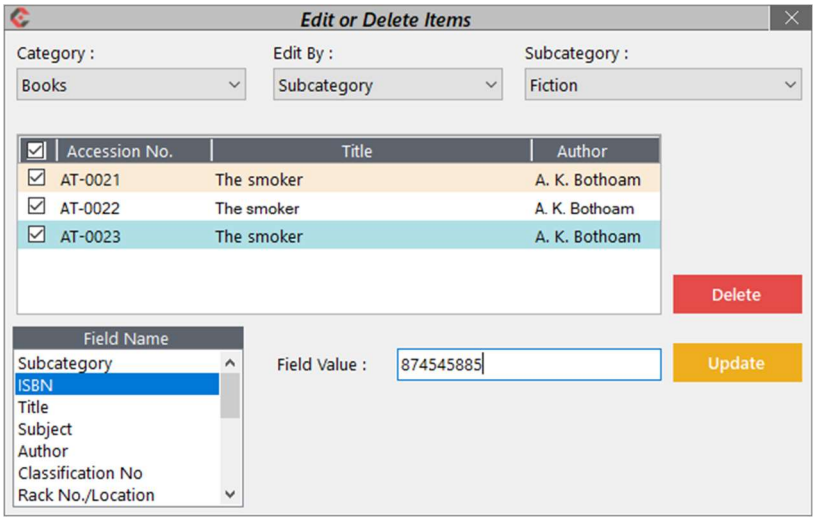
find edit and delete item. To delete an item click on “Delete” and confirm your action to delete. And to edit an item click on “Update” Change the data you want to update then click the “Update” button to save the updated data to the system.

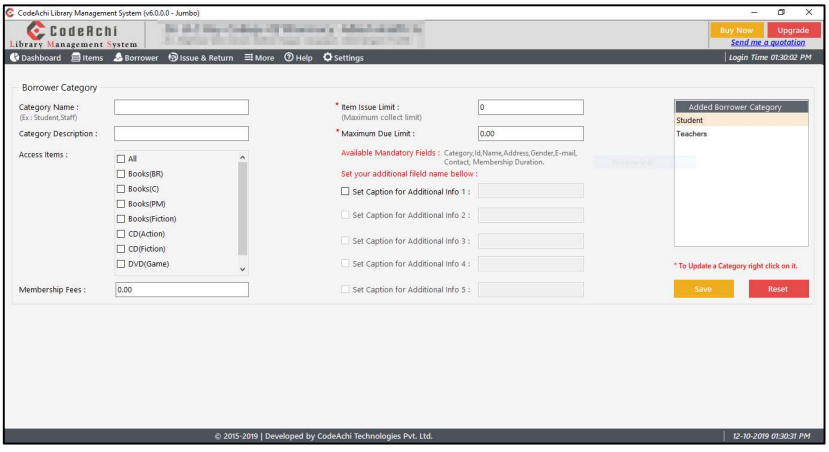


11.2 Deleting or editing multiple item at once: You can also delete or edit multiple data at once as well. Go to **Items-> Edit Items**from the menu. Select Category Edit by Sub category, or other fields to load the data to the Grid. Now you can select the items you want to Edit or delete. If you click on delete it will delete all selected items. Now to edit a field select the field, in my case I will change the ISBN of all items, I will enter the ISBN to the field value and click on Update to save the new data for all item at once.

12. One time Borrower & Member Settings:

One time **Borrower Settings**is same like we did one time item settings. This time we will create category of borrower and also set access to type of category or restrict them to a category. Set membership fees, Limit of total items can be borrowed, and fine due limit before they can be given new book or items. You can also set field name of your choice as well.

Go to **Borrower-> Borrower settings** from the menu. We have added 2 category by default. However like Item, you can delete them and create from new. It is recommended that, create Borrower Setting after you have completed item settings so you can give proper access for borrower to the item category.



12.1 Delete Existing Borrower Category: To delete an existing borrower category you can right click on the category from the list right hand side and click on “Delete” and confirm delete. Remember, if you are deleting a borrower category all data associated with this category will get deleted, and cannot be recovered. Please take action carefully.

12.2 Update Existing Borrower Category: If you have added a new book category you may want to give access to your existing category of member, and for that reason you need to

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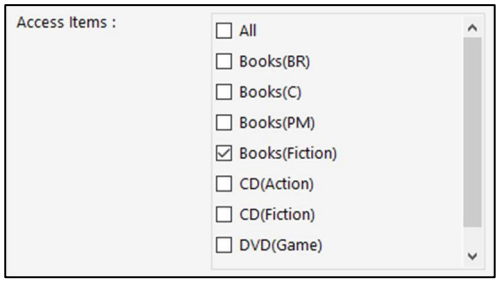
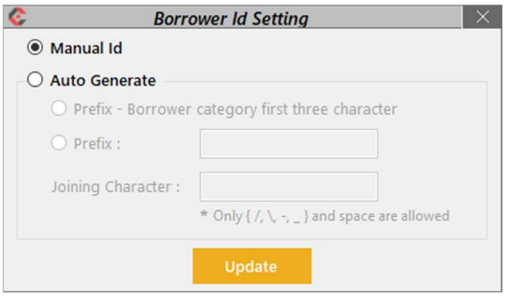
update the borrower category. There may be more reasons to update a borrower category. Right click on the category of borrower from the list right hand side, and click on "Update". That will load up the category to the screen, update or edit what you want to update and then click "Update" Button to save changes.

12.3 Add Borrower category: You can use this same screen to add a category of borrower. Click on Re-set to re-set screen if required. Now give a borrower category name, as example I will give "Evening Member" as name, will give some description to remember it later. Next thing is setting Field names that is required additionally for this type of borrower. I will set "Class" as another field when we will do entry of this type of member, you can set up to 5 field as per your need.



I will now select all the item category I want to give access for this borrower category. In this example, I will give "Books(Fiction)" access only. Now librarian can Issue Books from Books (Fiction) sub category. However, they will not have access to the other type of items/books. This is very useful when you want restrict a particular category of borrower to a particular type of books. Next thing is **Item Issue Limit**this number ensure the max number of item that a borrower can borrow at any time. Also set **Maximum Due Limit**this is the total amount of due (as per set currency) you can allow a student can have until they will be blocked for issuing new books/items. Now click on "Save" to save the category.

13. Add Borrower to your Library



Adding borrower is also same like adding items. There is two ways you can add a Borrower/Student for your library. First we will learn how to add borrower one by one and then we will learn how to add borrower using excel at once.

To add borrower go to **Borrower->Add Borrower** from the menu. If you are doing this for the first time software will ask to set **Borrower ID setting**

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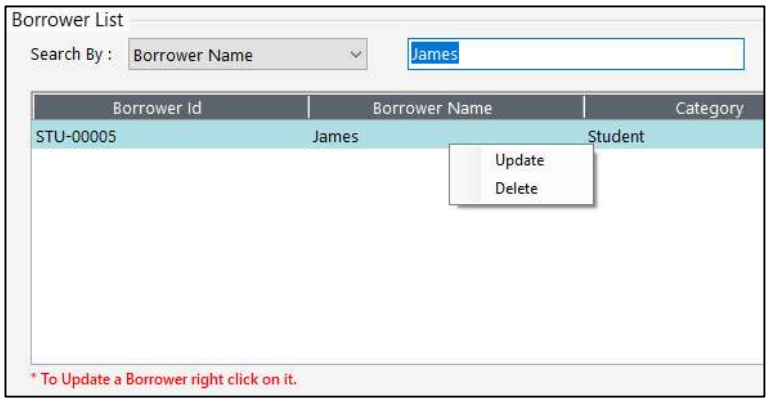
just like we did for the accession setting for the items. You can set Manual or ask the software generate ID automatically with your target format of ID. You can check accession setting guide given above again to relate with this settings. Most probably you want to set roll number as the ID in case you are a school, or you may already have ID for your borrower. Keep "Manual" in such case and hit "Update" button. To start adding your borrower details, 1st select category of the borrower from the list (which we have already created during borrower setting). Give borrower ID, Name, address, gender, email, and other fields required. You can also set image of the borrower from the Computer, web-cam or scanner as well, set if you want to. Then hit save to save the borrower to your software database.

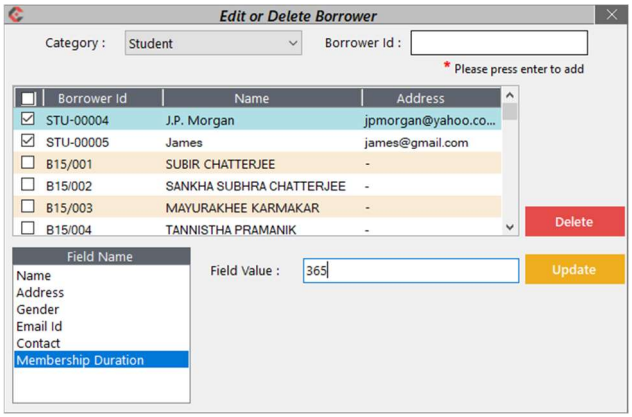
14. Edit or Delete Existing Borrower Data

Just like for the items we have given either the option to update or delete borrower from the system one by one or multiple at once.

14.1 Edit delete borrower one by one: This option is helpful when you are just need to update data of only one borrower. You can use the same **Add Borrower** interface we used to add borrower also for delete or edit borrower details. Use the bottom list to search down the borrower by given search option or scroll to the borrower and right click on the borrower from the list to get the Update/Delete options. Click on update that will load the data again to add borrower screen above, change the details you want to change and then hit "update" button to save changes. Delete is simple, just click on delete and confirm by "yes" to delete. You cannot undo this actions, so take action carefully.



14.2 Edit or Delete multiple borrower at once: You may have a situation where you want to delete complete borrower details from the system. Or you may want to update same field name for multiple borrower. This options make it easy to do so. Go to **Borrower-> Edit Borrower** to get the screen. Now select category, to load all borrower, select the borrower using the check box from the list you need to edit or delete. Click on "Delete" to delete them. Also to edit a field select the filed



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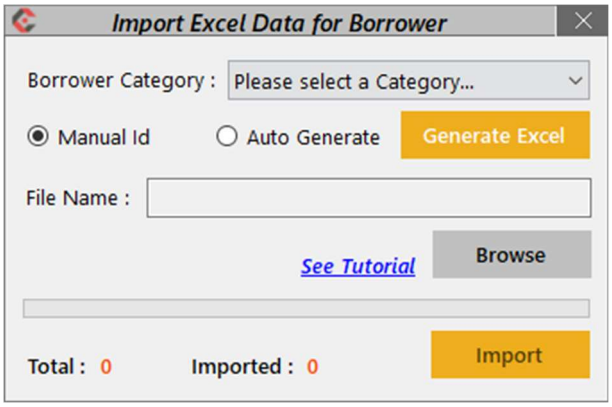
name from the bottom and put the filed value box and click “Update”, this will put same data for the field selected for the selected borrower. Again, take action carefully as you cannot undo this action.

15. Adding borrower Using Excel Spreadsheet



Adding borrower data using excel is very easy and helps a lot when you are migrating from older system, or you may have the data already in a excel file. Make sure you have MS office (2007 or above version) installed to use this feature. You can find this option on Add Borrower screen as a link or you can go to **More-> Data Migration -> Member data** from the menu to find the excel entry screen shown below. If you have read the item entry using excel this is almost the same process. The software need to understand the columns to insert the data as intended. You need to generate a excel format first then you need to put the data as required in the generated format then you can import them using the generated and formatted excel file. To generate a properly formatted excel file, first select the borrower category you want to add details, then select the ID condition either “Manual” (if you want to give the ID in excel file) or “Auto Generate” (if software generate ID for the entry automatically) and click on Generate excel, Save the excel format in a location you can find quickly. Now, open that excel and put all required data as per column name and save that excel once you are done. Come back to the same software interface and make sure if you have selected the same borrower and setting of ID generation which you have generated the format for. Now, select that excel file you saved with data, and click on Import. You can see progress of your import and also notification when import is completed. A log file will be generated if there was any data was not imported with the reason not imported as a text file in your desktop. You can take action for them later. You can now check if the data was entered using borrower data report from the report menu.

16. Printing Barcode Stickers for Your Books:

CodeAchi have taken extra care for your budget, and we have come up with a brilliant plan to print the barcode using your laser printer, so you do not need to invest on 2 printer one for barcode printing another for report/invoice printing. Both can be done in same computer. However, if you have both type of printer you can utilise both as well. In this section 1st we will learn how to print barcode in A4 or normal Laser printer, then we will also learn how to print using barcode printer.

16.1 What is the data getting printed as barcode: In order to identify a

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book uniquely, we have given accession ID to the book, now barcode will be the barcode representation of the accession number. You may want to also put some information on the sticker. By default we have a warning for the student not to tamper the sticker along with your institute short name. You can change them if you want from the setting.

You may wondering that some of your item already have a barcode for ISBN or other ID why don't we use them instead? Well, if you use ISBN or any other barcode for searching book, you cannot identify the exact copy of the book, as they may have multiple copy with same data, so you need to have a unique barcode sticker for each item you add to your library. However, if you don't wish to have a barcode system, that's fine you can write the Accession number using a permanent pen to the book and use them manually. Even if you are creating sticker, still write the accession number using pen somewhere in the item in case sticker gets damaged you can still identify the book and re-print sticker latter.

16.2 A4 size Label Sticker Paper: Yes, there is A4 size label sticker available which you can use as your labels for barcode. This type of paper comes with proper size and shape with adhesive at the back side. You can purchase this type of paper online or also you can purchase it from local supplier. Recommended paper is A4 30L label printing paper (30 L means long size with 30 labels per A4 page) which produce a standard 77mm X 27mm Label sticker. This Software also support A4_21L - 3X7 (21 labels per A4 Page), A4_24L - 3X8 (24 labels per A4 Page), A4_30L-3X10 (30 label per page), A4_40L-4X10 (40 label per page), A4_65L-5X13 (65 label per page) currently for A4 size label paper. So, chose paper as per your convenient, as paper are very durable and works for long period. To make it more durable stick the label where it can be safe from damage in the item. If you are having problem finding this paper feel free to contact our team to let you help finding them online.

16.3 Printer adjustment before printing: Make sure you have properly inserted the paper to the printer. Please tight the notch of the paper as much as possible so that print doesn't get misaligned due to mechanical reasons. After putting paper tight the notch of the paper tray, depends on your printer model.

This will ensure you print the sticker on spot and you do not waste a paper. "Save Paper" Imitative ensures that you do not waste a paper. To know more check our website and look for "Save Paper" from the menu.

16.4 Re- Use of paper: Suppose, you have just printed few barcodes from a paper, now you still have some blank sticker left in the same page, you can re-use the paper without any

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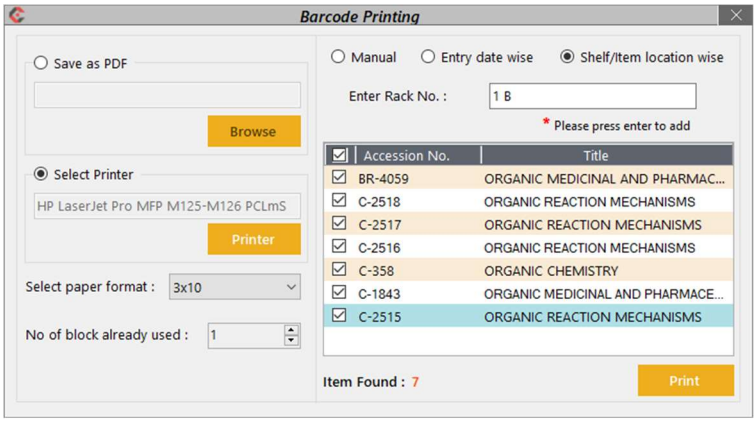
problem. You just have to command the software to leave places where is no sticker is there and start printing from the available. You will learn this while printing barcode in next stage.

16.5 Start printing barcodes: To print barcode go to **Items->Print Barcode** from the menu. On this screen, you can generate and print barcodes for your items. You can also save them as PDF, in case your printer is not attached to this computer, you can generate the PDF and print them from another computer. Any A4 size laser printer is fine for printing barcodes. Use best laser printer from any brand for best quality of printing. I have a 30L A4 paper in this case where I had already used one sticker earlier, this will help you understand how to print barcodes and also how to re-use the paper if some sticker was already used. First I will select printer from the available printer list, by clicking on "Printer" button. Then I will select paper format, in this case I will select "A4-30L_3X10". Now, I will select **Number of block already used** as 1, meaning 1 sticker block is already used from the 1st paper I have inserted.



Next, you can enter accession manually to the printing list one by one, by entry date, or by Item location wise. Load and populate list as per your convenient. In this case I will select Shelf/Item location wise, and I will give the location (Rack number) for which I am generating the barcodes.

Once list is populated, select the items you want to generate barcodes. Hit "Print" to print barcode finally. Now stick the barcode in a safe area of the books or items. It will be good practice if you also write the barcode number manually using a permanent pen, in case barcode gets damaged in future you can re print the barcode for the item again later.

16.6 Print using Label Printing Printer: You can also use label printing printer to print barcodes use 70x27 MM labels to print your barcode. Select the printer from the list and also select the correct paper start with "POS" also set top margin to set the distance between two labels and print as same as printing with A4 printer. You can also check out video tutorial for printing barcode for practical example.

17. Printing ID cards or only Barcode sticker for Borrower

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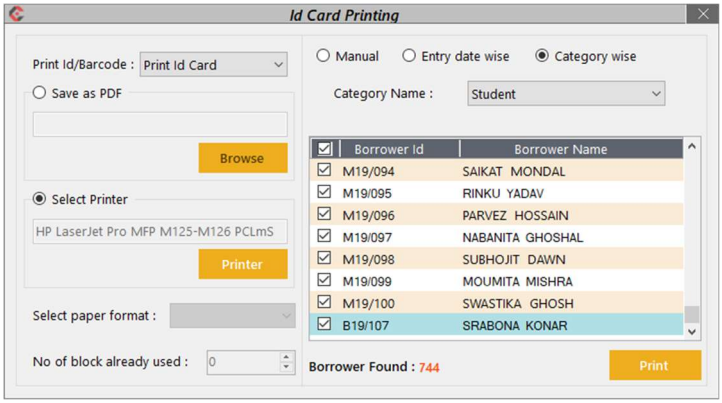
Printing ID card or Barcode is similar to what we did for barcode printing of the barcode (check point 16). You can both print Library ID card from the software or also only print barcode for the existing member and stick the barcode to the card which you may have already. To print ID card go to **Borrower ->Print ID card.**

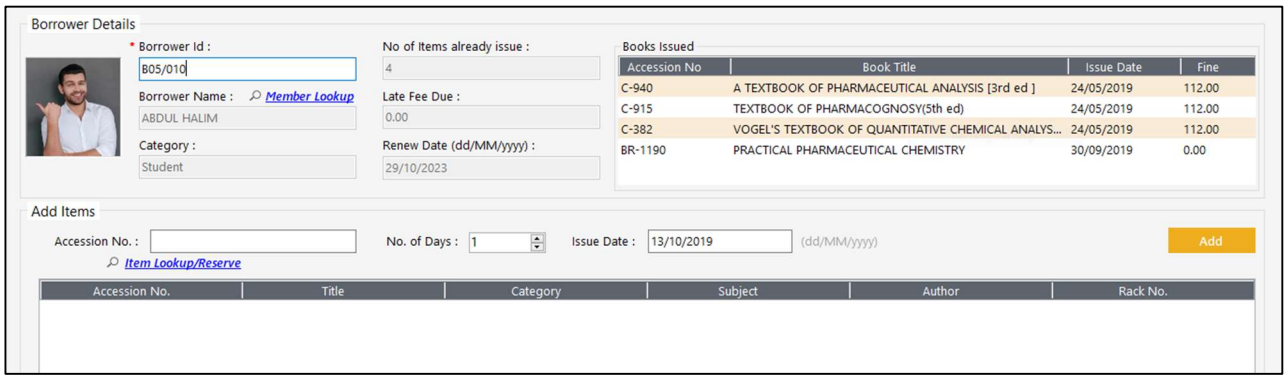


Select the barcode or ID card option from the list, select PDF or Printer option, now populate the list of the borrower, and hit "Print" to print them. The size of the ID card is 90X55 MM. We have planned for more flexibility for printing ID card in our upcoming version 7.0 in 2020.

18. Manage Circulation of your book or Item

This is the interface you need to use for most of the time and we have make it simple for you. You need to perform three basic actions to manage your circulation – Issue, Re-issue and Return.

18.1 Issue a Book or Item: To issue a book or any other item to your borrower go to **Issue & return -> Issue Item** from the menu. Now focus your mouse to Borrower ID, and then



put your borrower ID, as soon as you will enter the borrower ID the borrower data will be loaded to the screen. You can see the details like Name, Image, Category, Total Item issued (still to be returned) Late fee due, Renew date (membership), along with list of the items issued with the date and accession number.

Next, focus on the add items accession no, and scan the item's barcode, or you can manually type the accession number. That will add up the item to the list below with default days for issue of the book (depending on the item category you have set), add as many item you want to issue. Then finally hit on "Issue Book" to issue the books/items to the borrower. If you have

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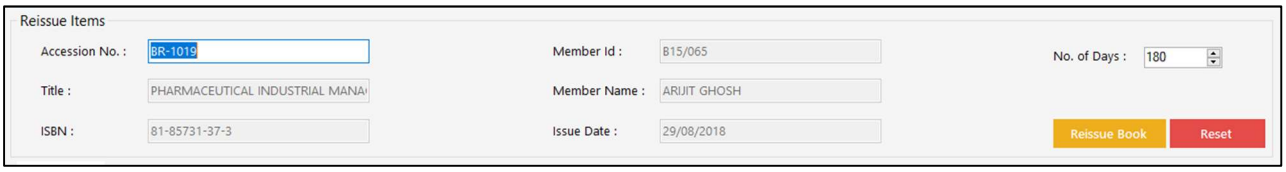
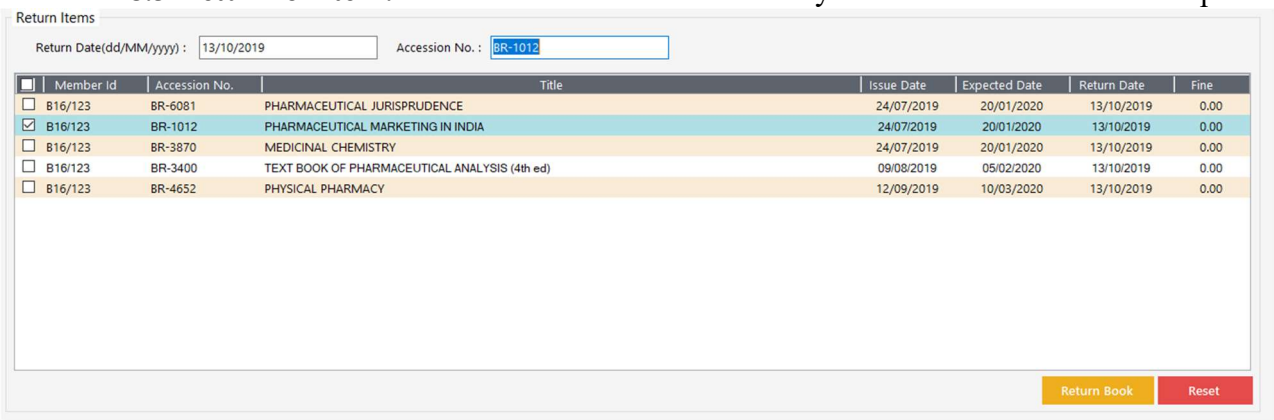
scanned an item by mistake, you can also remove that item by right click on it before issue the items to the borrower. So, issue of book become matter of few seconds!

18.2 Re-Issue an Item: Your borrower may want to extend their borrowing period for a



item, and re-issue will be the function which you need to perform to extend it. To re-issue go to **Issue & return -> Return & Re-issue.** Put the accession by scanning the barcode with your barcode scanner or you can manually enter them. Once you put the accession it will show you details of the book, default number of days will be loaded to the screen. However you can change it manually and Click on "Re-issue Book" to re issue the book/item to the borrower and extend their borrowing time so they do not get panelised or fine get imposed by the system.

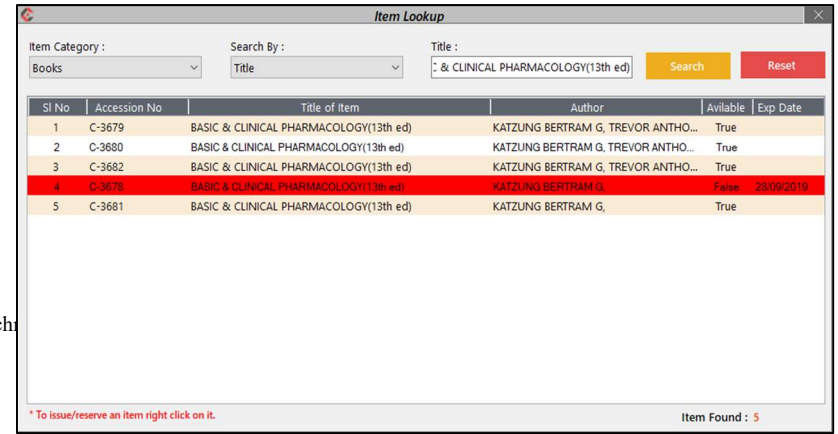
18.3 Return of Item: Now on the same screen below you can find the return item option.



Scan or manually enter the accession on the accession number box, you can set date if required else leave it as default current date. As soon as you will enter the accession, all Item that were issued to this borrower will be loaded to the screen, but only the item was scanned will be selected, if the borrower returning multiple items at once select the items from the list to avoid scanning multiple books. Then simply click on "Return book" to return the item to the library.

19. Searching a Book or Item

You may need to look for an item by its title, category, subject or using any other criteria and find the physical location of the book in the



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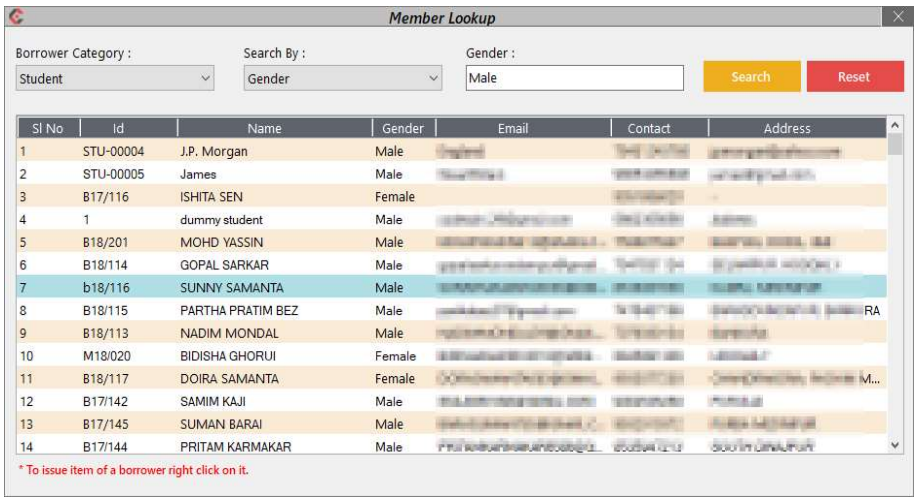
library. You can search the item in two different places, one is in the issue item screen, another from menu Search Item/borrower. Both are pretty same for searching books. In the issue item screen first put a borrower ID to get "Item Lookup/Reserve" link activated. Click on the link to get the searching screen. Now select item category, select search by option and put the value of search and hit "Search" to get all data in the list. The red one are the items that are currently issued to a member and not returned yet. You can also use the screen for issue the item, right click and click on "Issue" to load the item in the issue list below. You can also search the book from the menu and load the search screen, rest of the functions are similar.

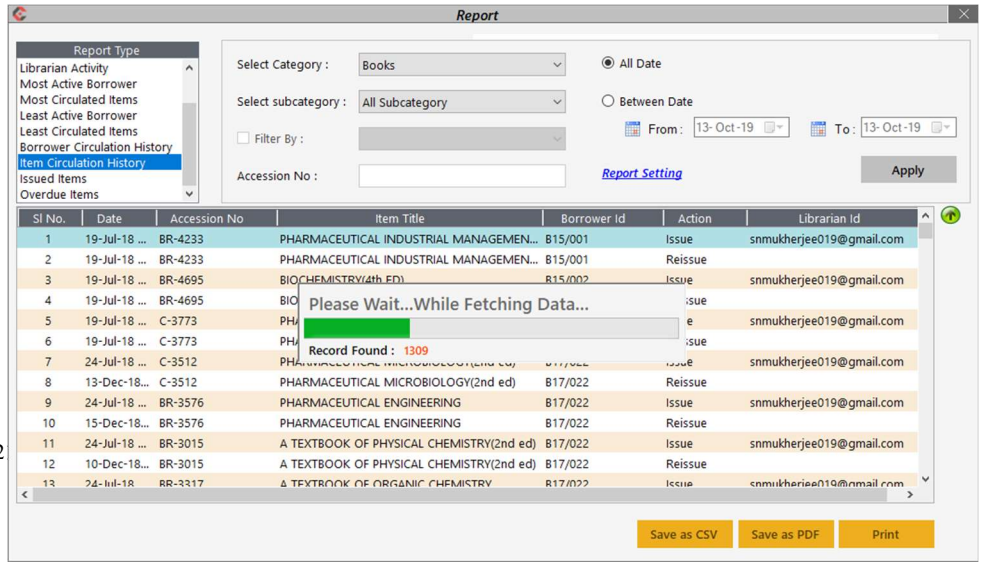
20. Searching a Member or Borrower

Searching a borrower is also a handy function to quickly see the details as per search requirements. You can also search a borrower from same two places, like we have for the item search. Now, from issue item screen click on "Borrower lookup", select borrower category, search by field and put the value of search and hit "search" button to get the result in the list. You can also select the borrower for issuing book from this screen. And you are ready to perform another search if required.



21. Generating Reports & Analytics

Generating reports are the most important part of the software. You may want to know your library in details and take decision on various aspects. In this version we have included some exciting reports as well as covering all basic reports that you may need as a library



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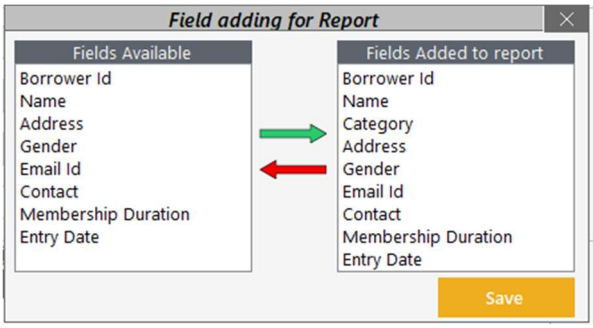
administrator. We are very happy that our software now can generate CSV, PDF reports and also you can print the reports from the software using a printer. To generate analytics got to **More->Report**from the menu. In this screen you can generate data into the grid as per your selection and also print or save them as CSV or PDF file. Using various type of filter you can generate more than 1000 types of reports.



21.1 Borrower data: The first repot you can create is borrower data report, where you can generate list of the borrower depending on your filters. 1st you need to select Borrower data from the list left hand side, then you can select borrower category or keep all for getting all category data at once. Now select date range or all date for add date range of borrower then click on "add field name" if you want to change field names for the report. Select the field name you want to include from the left list and click on green arrow to add to report. To remove a field click on the field name from the right list and click on red arrow button. Now close that and hit "Apply" to generate report. Wait till the list is completely loaded. Now print or save as PDF to check it in details with some analytics.

21.2 Item data: Item data report is something similar to the borrower data report, you can do some experiments with-it to get better understanding this type of report.

21.3 Payment Data: This report shows the payment collection data from your borrower. You can check each transaction with all relevant details.

21.4 Librarian Activity: Here you can check librarian activity details. As example you can check which librarian was involved on a particular transaction.

21.5 Most active borrower: you can check most active borrower by transactions. You can also find top user for a category of borrower or among all borrower with their number of transactions. You can also set how many number of borrower you want to list. Select 0 to Show top for all borrower with their number of transaction.

21.5 Most circulated Item: You can also find the most circulated item by title, like we got most active borrower.

21.6Least active borrower: You can also create report for least active borrower of your library.

21.7 Least Circulated Item: Finding the items that are not getting circulations is very easy with this feature.

21.8 Borrower Circulation History: This analytics shows you the circulation history of a particular, a category or all borrower.

21.9 Item Circulation History: Finding analytics of a book circulation is easy with this report type.

21.10 Overdue Item: You can also check the report of the items that are not returned before expected date.

There is many report which you can create by filtering the available option. If there is any report that is required by you but you unable to find contact us with the requirement.

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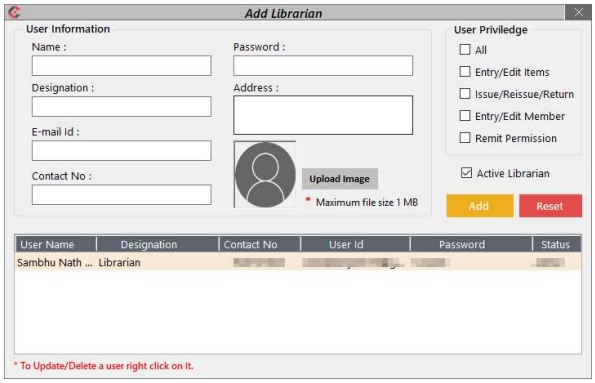
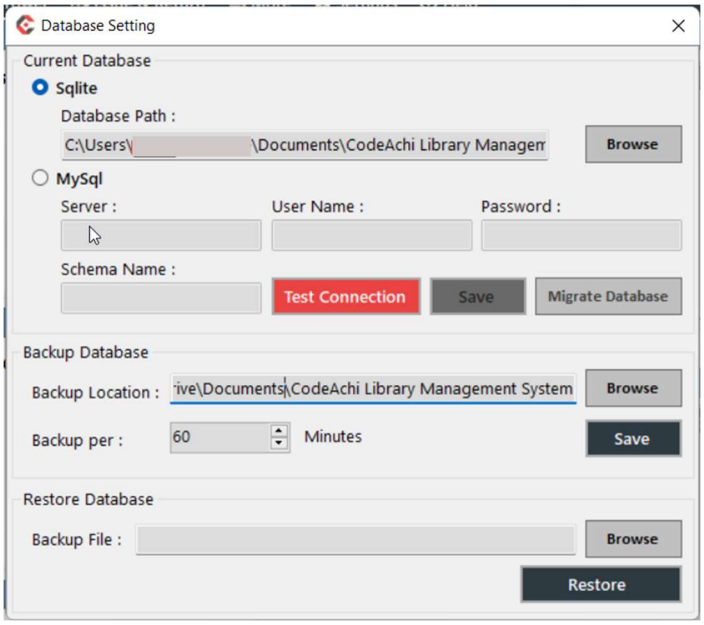
22. Adding Multiple Librarian



Your organization may have multiple librarians, and this is important to find the responsible librarian for a transaction, you can add multiple librarians from our Colossal or higher license, once a librarian logged in they are getting tracked for their actions so we can find the details later. Make sure you are logged in as Admin and Go to **Settings-> Add Librarian.** Put all the information required for the librarian, you can also give him privileges as you want to restrict his actions to the system.

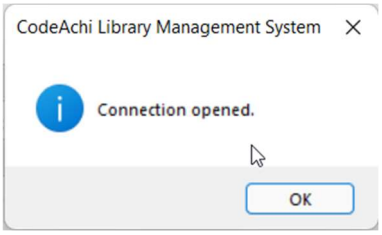
23. Database Setting



Database stores your data which you feed through the software, such as your books, items and members and other records. This is very important to set backup location for the database, in case there is anything unwanted happens with the system. This software takes automatic backup as per your preferences. We recommend you to take backup in a cloud drive (Google Drive, One Drive etc.) to avoid any data loss if the physical machine gets damaged. Go to **Settings-> Database Setting** from the menu. We always encourage you to back up your data with first priority.

23.1 Current Database Setting: There are two types of databases is supported in CodeAchi LMS. You can use sqlite in case you are running the software from one machine only. If you are looking for connect the same database from different machine/location you need to consider MySQL online/offline database.

23.1.1 SQLite: SQLite is very lightweight database and works like a file in your computer. By default software will install the **SQLite** database under the **Document** folder of your computer however, you can change the database location of your choice within the computer. First, you need to copy the current database file (named LMS.sl3 or **LMS)** from your document folder -> CodeAchi Library Management System and paste to the location you want to keep the database. Now you need to browse to the location you want to keep the database from the database setting



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screen(shown above). Make sure to keep your database other than your desktop or any other exposed folders to keep your database safe from getting misused or deleted. Now, Test connection and if the software prompted connection is opened save the database setting.

23.1.2 MySQL: If you want to create multiple PC stations for your librarian so that, multiple librarians can work together, you can set MySQL connection using this panel. To use MySQL you need Colossal or higher license with extra PC licenses.

The MySQL database can be installed over a hosted server or also on a local server. This depends on how you want to access the CodeAchi LMS from another computers. In case your all computers are in the same building and connected with the same router/Wi-Fi/internet connection then we suggest you to install it in a local server. But if your computers are in different locations and not connected via same router/Wi-Fi/internet connection then install the database on a hosted server so that all computer can access the database using any internet connection. If you have an online hosting service then you can ask your hosting provider to provide you a database with following information for MySQL database:

1. Server IP / Domain Name
2. Database user name
3. Password
4. Schema name

If you want to install the MySQL database locally then you can only access the database from the computers which are connected from the same router/Wi-Fi/internet connection. You can use any version of MySQL however we recommend you to use the latest version of MySQL.

Once you have the above four information select MySQL option and put the details in the software and click on test connection, if the connection is opened then save the database connection.
Also, you need to connect to the same database using same option from the other computers on which you have installed the software. In case you need technical assistance contact our chat support.

23.2 Backup Setting: You can set location for taking backup automatically as per your preferences. You can either take backup in a secondary drive or also you can setup cloud drive like google drive or one drive to take back up there. Cloud drive synchronize your backup files automatically if you are connected to internet. Chose the location of the backup, set hours that a backup will be taken, hit “Save” to save your backup setting.

23.3 Restore Database: If you need to restore the database from a backup, just browse the backup file you want to restore, and hit on “Restore” to restore the database.

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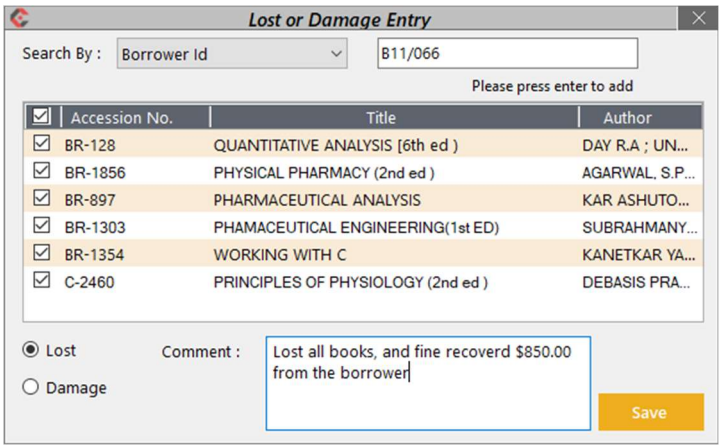
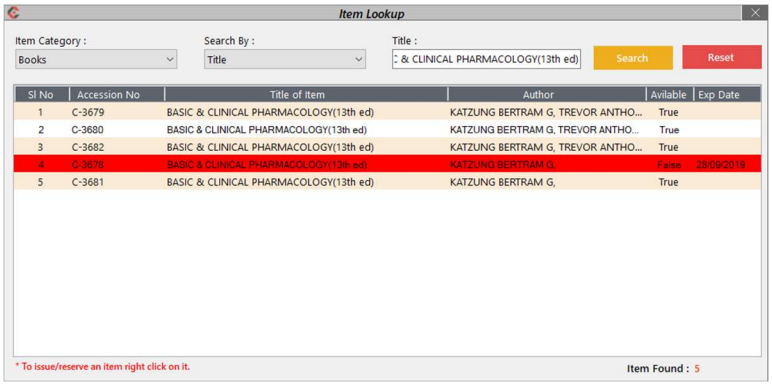
24. Report Lost or Damage of Item

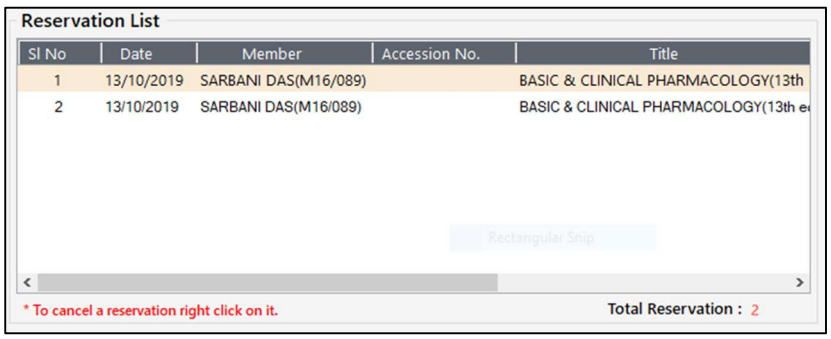
If you have a lost or damaged item to be registered with the software go to **Item->Report Lost/Damage** now select search by option and load the item details in the list select the items that you will report lost or damaged from the list. Select if lost or damage, give explanation in the comment box, and hit save. You can also check the lost damaged data from the analytic and report section.



25. Reserve an Item for a Borrower

You may need to reserve an item for the borrower if you do not have the item currently available in the library. You can do this in Issue Item screen, after putting the borrower ID, go to "Item lookup/Reserve" link then find for the item the borrower is looking for. If the item is unavailable it will be showing in read with available status as false. You can only reserve an item for the borrower if it's not available, and make sure there is no other copy is available by searching with title. Right click on the item and hit "Reserve". That will reserve the item instantly and when this item will get back to the library Librarian will be reminded about the reservation and borrower will get Email/SMS notification if you have set email or SMS notification settings. You can keep a Physical Reservation Rack to keep the reserved items in that rack to find them quickly when your borrower comes to collect the item. There is setting by which you can set how many days a reserve will be active when it's get cancelled automatically if user do not collect in-between that period once the item is available. You can also cancel a reservation manually from the dashboard, by right click on the details of reservation list.





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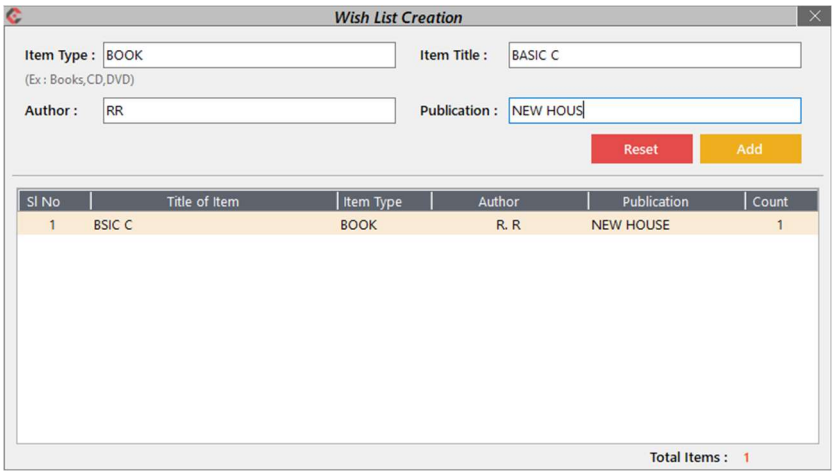
26. Create Wish List for Items



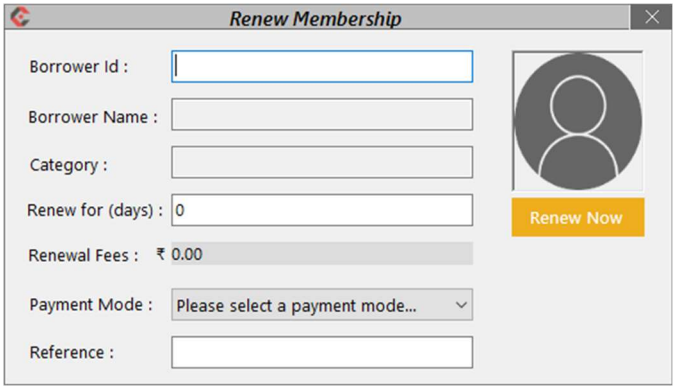
You can create wish lists for the item enquiry by your borrower and can check how many times it was asked. To create Wish list go to **Item-> Wish list** from the menu.

Put all the required details and save by clicking on "Add". You can also save this wish list as excel. This help in acquisitions for the items for your library.

There will be more update in future for this module.

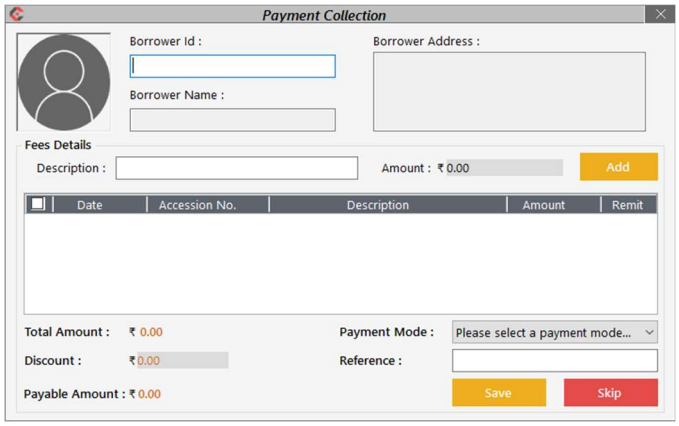
27. Renew Borrower Membership

You can renew your borrower membership which will let them borrow books from the library, and extend their membership period. Go to **Borrower-> Renew Membership.** Type borrower ID, Put Renew days, also put renewal fees on your default currency, and click on "Renew Now" This will generate a pdf invoice for the payment made. By default its cash, you can set payment mode as well with reference comments for the payment made if any. This will add up days to the membership day left for that borrower and he can access the library materials.



28. Collect Fine and Payment

If a borrower have fine due to non-return of the book/item before due date, Collect fine and payment from the following screen. If there is any fine, if the borrower return an item it will be shown automatically. But you can go to More->Payment to collect payment manually. You can also Remit a fine for the member if you want, software will also track record if there is any remit on fine or discount were given to a borrower.



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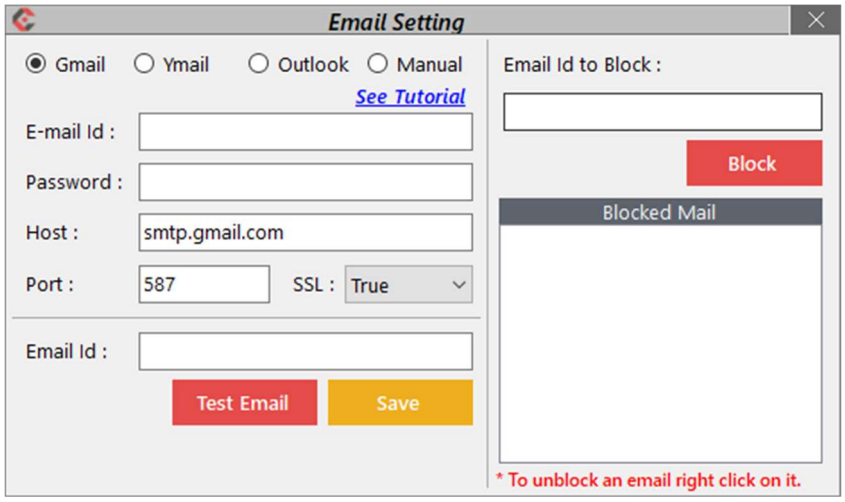
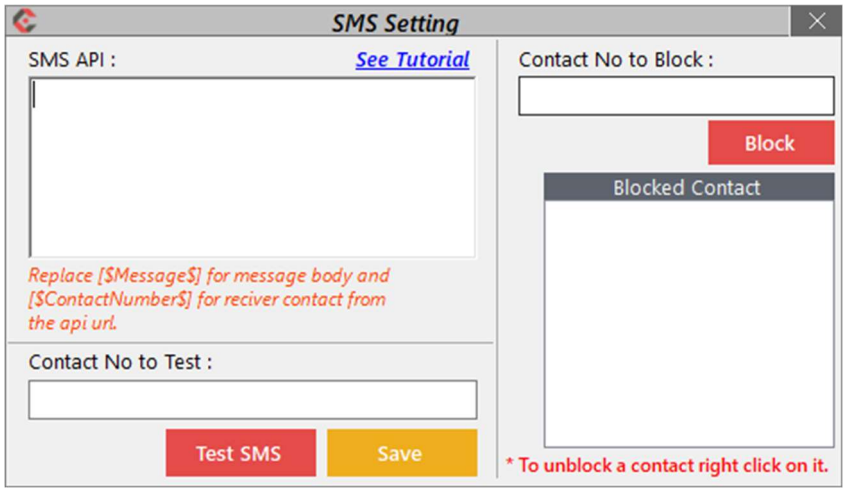
29. Set Email/SMS setting

You can send email/SMS directly from the software. You can also create template for sending email so it will automatically replace the template with borrower or transaction data by the software.

29.1 Email Setting: You need to configure SMTP setting for sending emails from the system. You can use any SMTP provider like Gmail, Yahoo, outlook or other. But if you are using Gmail, Make sure the account have set "login from less secure app" option on (Check online for more details if your email is not getting sent from Gmail). Go to **More-> Send Email/SMS** option from the menu, and look for **Email Setting** link. Select SMTP provider, "Gmail" for Gmail account, Ymail for yahoo account "Manual" for manually entering the data. Now put Email ID, Password, HOST PORT, and SSL. Now to make sure your email setting is working, put an email ID where you have access, and click "Test Email" if email sent successfully and you received it successfully its done! Save the email SMTP setting. You can also blacklist email IDs, in order to avoid send email to those ID. Use right hand side box to create email ID blacklist.



29.2 SMS API setting: CodeAchi LMS has ensure that you can use any SMS API to send SMS to your borrower for quick notification. Please put the API URL as per your API provider to the SMS API text box. Now replace [$Message$] where API will take message, and [$ContactNumber$]. Then put a contact number below and click "Test SMS" if you have received SMS successfully it means you can save the setting. You can also contact our technical team if you require help to setup SMS API. You can also create blacklist of numbers where you do not want to send SMS using right hand side box.



29.3 Create SMS/Email Template: You can save templates for sending email and SMS and software will automatically replace with data for the used keywords in the template. Check the available "Keyword Variables" in the screen and use them in your template as per your need.

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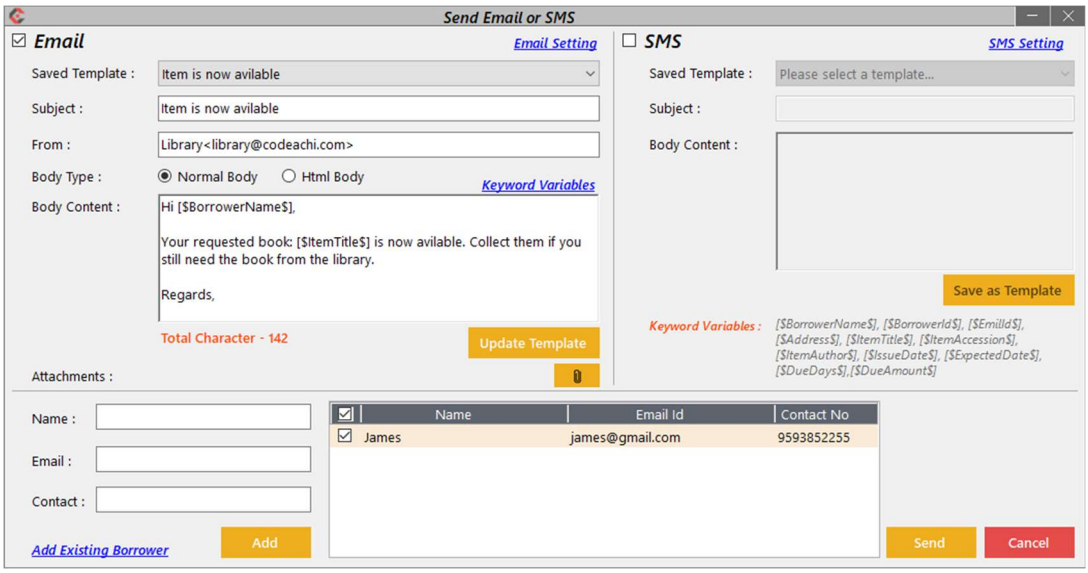
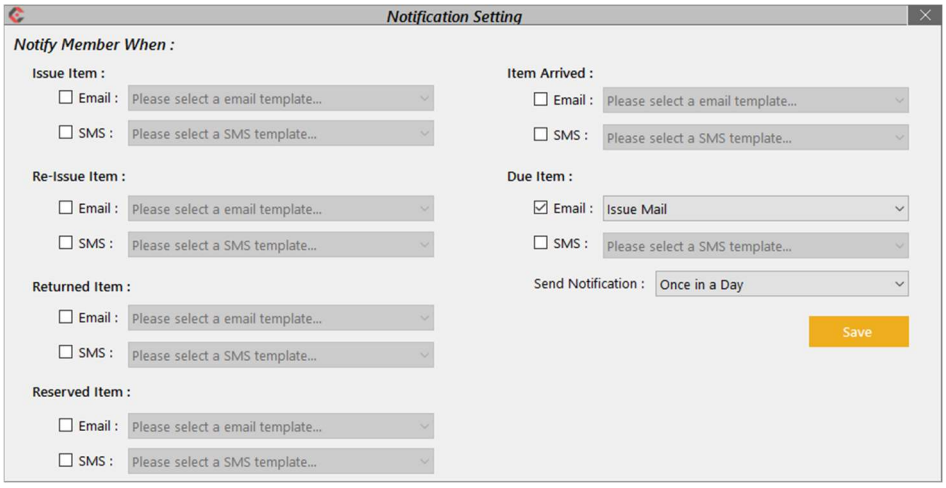
Create template as per your need and click “Save as Template”, this will add the template in the Saved template list. You can select them when you need in future. Same with SMS template.

29.4 Send Email/SMS: You can now send Email/SMS together, if there is any email or SMS you want to send manually. But there is **SMS/Email notification setting** which you can use to send automatic email SMS on various transaction like book issued, book returned, fine imposed, due date etc. You can populate receiver list below by entering the contact details manually or you can click “Add Existing Borrower” to add your existing member to the receiver list. Search and select the members you want to send SMS or Email. Make sure you have checked Email and SMS if you want to send both in the sending screen. Check the list you want to send email and SMS and template is selected for sending. Now click on “Send” and software will start sending Email/SMS one by one. Let it complete and you can minimise this screen and continue your work till all email get sent to the borrowers.



30. Notification Setting (Email/SMS)

Automatic sending of SMS/Email is possible when there is some event like Item issued, Item re-issued, Item returned or Item available after reservation. You must have already completed the SMS/Email setting for notification setting. Go to **More->Notification** for this



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option. Now check the boxes as per your need and set the template for such events. If you want to create template go to Email/SMS setting.

31. Migrate your data from older system

We understand the problems with the existing software, and one may get into trouble and fear of migrating the system. We have created a simple interface using which you can migrate your data in simplest way. You can use excel file to migrate your data.

31.1 Migrate Student/Borrower details: You can go to **More->Data Migration-> Member data**from the menu. You can follow the add borrower using excel section above for more info.

31.2 Migrate Book/Item details: We have already learned this above, please check the add book using excel section above.

31.3 Issue/Return data: Now once both item and borrower data is imported, you can now import issued/return data from the older system. Generate excel and format as CodeAchi LMS require and import them.

32. Purchase License

To purchase a license you can click to dashboard and click “Buy Now” this will open up the available license page. You can now pay using your credit card, debit card, online banking, PayPal or wire transfer. Chose the license you require and purchase it online. You can now get instant license as soon as you made the payment from our automatic licence delivery system. We take one working day to deliver license key in case paid using PayPal.

33. Activate Your License

Click on “Activate” button on top of the dashboard, put your serial key and email ID and click on activate. Make sure you have an active internet connection before activating your license. If you are having problem registering your product, contact our support team.

34. Report a Problem

To report a problem you found in our software go to **Help->Report a problem.** Describe your problem in the screen and click on “send” to send the problem to our support team.

35. Technical Support

We provide technical support online using Skype and TeamViewer officially. Click on **Help->Technical Support,** Provide required details and click on submit. Our team will contact as soon as possible on given time.

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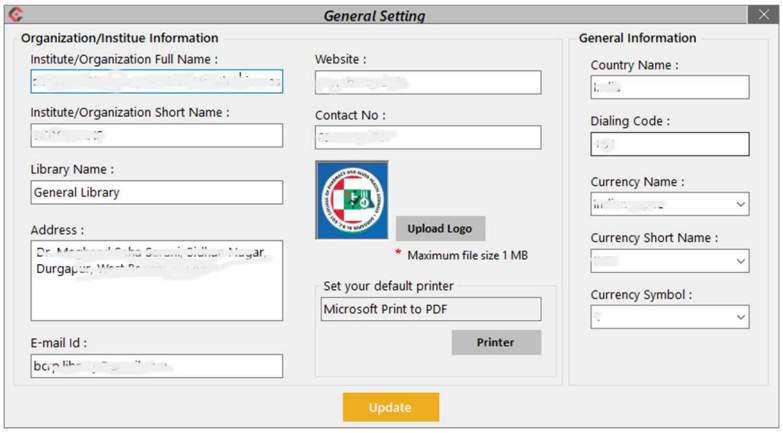
36. General Setting

In general setting you can set your library details. Go to **Settings->General Setting**
And change the details you want to change and hit on update to save the details.



37. Change Password

You can change your current password by going to **Setting-> Change Password** and put your current password and give new password and also confirm it before save.

39. Student Access Point using LAN

You can create student access points inside your library to search book from a station. And by doing so, your student can search for items in the library and find the location of the book.

We have created separate application for creating student access point. You can download that from the website Student Access Point Setup. You still need extra PC license to activate and create access point for your library. Go to setting and set database path and host IP from the application, and that's all you need to do like we did for LAN setting, please check that out for more details.

40. Contacts for extra Help

We are committed to stay with you when you require us. Our support team is always happy to answer your query and ready to provide you support you need. We use TeamViewer application to provide official support online. Same time you can contact us our chat support in our website, WhatsApp us +91 9593852255, Skype us: codeachi anytime you need. We are available 24x7 for you.

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41. Vision towards upcoming version

CodeAchi is committed to keep your technology updated. We have already planned for our next 10.0 version to be released in 2022. Like always you will get that update for free if you have a valid license.

42. Video Tutorials

We have created a series of video tutorial, which is available in our official YouTube channel. You can subscribe to our channel for the updated tutorials and leant the software as per your free time.

43. Common troubleshoots

If you have problem such as software not responding, please close the software from the task manager. Restart the software from

44. Conclusion & Appendices

We are grateful to you for your co-operations already. Please feel free if there is anything confusing in this document. This document were produced for training purpose of CodeAchi Library Management System.

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Thank You

Get In Touch