

# ***Getting Started: Geac Library System ADVANCE Clients Release 6.05***

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The Geac Library System ADVANCE Clients Release 6.05(AdvClients) provide you with Windows compatible library management tools for performing your library's circulation, acquisitions, cataloging, database searching, holdings maintenance and serials control, and system codes setup functions. The AdvClients work in conjunction with the Geac ADVANCE Library System server.

This document applies to the October 2002 version of the Geac Library System ADVANCE Clients Release 6.05, which include AdvCat and AdvPac, and GeoCat 6.05/GeoPac 6.05. This document provides you with basic information for setting up the AdvClients. The basic steps are:

1. Check that your workstation's system meets the AdvClients' minimum operating requirements. See the following *1 Basic Requirements*.
2. Load the Geac Client CD and run the installation program. See the following *2 Installing the AdvClients*.

NOTE 1: The AdvClients require that you have the basic knowledge and skills for working in your workstation's operating system. See your workstation's Start menu Help.

NOTE 2: For information about last minute changes and known problems, see the README.TXT file in the main directory on the Geac Client CD before installation, or in the AdvClients main directory after installation.

## ***1 Basic Requirements***

The AdvClients require your workstation to have, at minimum:

### **Network Connection/Servers**

A UniVerse Enterprise version 9.6.1.4. connection to the ADVANCE server.

All ADVANCE clients at Release 6.05 (including AdvAcq, , AdvCirc, AdvHoldings, AdvMaint, AdvCat, and AdvPac) require ADVANCE 6.82.23.

Standalone AdvCircOffline 6.05.0000 requires ADVANCE 6.7 Patch 19 or higher.

GeoCat 6.05 and GeoPac 6.05, if used with ADVANCE, require ADVANCE 6.82.

**Processor** – Intel Pentium 200 MHz. **Operating System and Software**

For single client use, where only one client will be in use at a time on a workstation: Microsoft Windows 95, Windows 98, or Windows NT Workstation 4.0 service pack 4, or Windows 2000, or Windows XP-Pro. For multiple client use, where more than one client is in use at a time on a workstation: Windows NT Workstation 4.0 service pack 4, or Windows 2000, or Windows XP-Pro.

Microsoft Internet Explorer 5.5 service pack 2, or later.

Microsoft Winsock 2.0 and networking protocols.

File system and network support for long file names.

For Windows 9x: read and write privileges. For Windows NT, Windows XP-Pro, or Windows 2000: administration privileges.

The ADVANCE clients 6.05 are compatible with and can be used with all currently supported Windows operating systems. Note that Microsoft no longer supports the Windows 95 operating system.

**Memory** – For Windows 98, 98SE, ME: 64 megabytes of RAM. For Windows NT, Windows 2000, or Windows XP: 128 megabytes.

**Hard Disk Space** – 500 megabytes of free disk space, depending on local storage requirements, workfile usage, and offline transaction storage requirements. Offline transactions require approximately 1 megabyte of space for every 40,000 transactions.

**Video Display** – Video adapter that supports a non-interlaced display of 1024 x 768 pixels and 256 colors at 72 Hz refresh rate. 2 megabytes of video memory. A 17 inch monitor that supports a non-interlaced display of 1024 x 768 pixels and 256 colors at 72 Hz refresh rate.

**Compact Disk drive.**

**Keyboard Wedge type barcode scanner** – Recommended. Note: scanners that require serial port connections **cannot** be used.

**Fonts** – ARIALUNI fonts are required for the XML display and edit features of AdvCat and AdvPac. These fonts were distributed with the AdvClients 6.04 but are not distributed with AdvClients 6.05. Note that these fonts come with Office 2000 and Office XP applications.

#### ***Performance Enhancement***

The AdvClients' performance can be increased by expanding network capacity, upgrading host server speed, and improving client workstation components. For workstations, consider the following improvements:

- a faster processor and bus, including faster video bus (such as AGP)
- more and faster memory (such as SDRAM)
- a faster video card with more and faster memory
- a faster hard disk drive

NOTE: The AdvClients are sensitive to the performance of the network that connects the AdvClients to their related Geac servers. Periods of

heavy network traffic may slow the performance of the AdvClients for those periods.

## **2 Installing the AdvClients**

### **NOTE:**

**If you are re-installing (i.e. upgrading) your workstation with the new versions of the ADVANCE clients or GeoCat/Pac, first see the following *Installation Notes* section for the versions that should be uninstalled, and the recommended procedures to follow (backups, etc).**

NOTE: During setup, if a message is displayed asking you if you want to install or update certain files that will require your workstation to be re-started, click OK. The files are required by the AdvClients and may improve the general operation of your workstation.

NOTE: . If AdvPac/Cat is being installed alone or with the other Release 6.05 AdvClients, the installation program (setup) will automatically remove any version of GeoCat/GeoPac currently on your workstation and install AdvPac/Cat 6.05 in its place. If you have previously created a shortcut to GeoCat/GeoPac on your desktop, you should remove the shortcut after installing the new AdvClients 6.05.

NOTE: GeoCat/GeoPac can only be installed on a workstation that does not currently have AdvPac/AdvCat installed. The installation will fail with the message "Setup cannot continue. You need to remove the ADVANCE clients first. GeoPac/GeoCat will not run properly on the same system where AdvCat/Pac is installed."

1. To fully display XML records in GeoPac and AdvPac searches, install Internet Explorer 5.5 sp2 or higher, on your workstation before installing GeoPac 6.05 or AdvClients 6.05. If you install Explorer 5.5 or higher, AFTER installing these clients, you must then re-install the Clients.
2. From your ADVANCE server System Administrator, obtain the information that your ADVANCE client will need for connecting to the ADVANCE server. The setup program will prompt for the following information during setup, unless a previous version of the ADVANCE clients is still present on your workstation:  
Host Name, Account Path, Unix User Name and Password.  
You will also need the z3950 port number for your ADVANCE local server. The z3950 port number is entered in GeoParms after your ADVANCE or GeoPac/GeoCat client installation is complete.
3. On your workstation, shut down all running programs, including your Email system.
4. In your PC workstation's CD drive, load the AdvClients CD:

- If your workstation has a CD automatic run feature, the AdvClients setup program will start and display the ADVANCE Clients Setup Preferred Language window.
  - If your workstation does not have a CD automatic run feature, use the Windows Start menu's Run command to find and run the file SETUP.EXE. The file is located in the AdvClients CD's main folder. The AdvClients setup program will start and display the ADVANCE Clients Setup Preferred Language window .
5. In the ADVANCE Clients Setup **Preferred Language** window, click the drop down arrow and select your preferred language. Then, click **Next >**. The setup program displays the Geac Library Client Setup Program window. At this point, the setup program pauses for a few seconds to check your workstation's current set of programs. When the setup program is ready to continue, the Next > button text becomes bold. Then, click **Next >**. The setup program displays the "Setup is ready to install the software" window pane, within the Geac Library Client Setup Program window.
  6. In the **Setup is ready to install the software** window pane, click the button:
    - **Install Now** to install all of the ADVANCE clients on the Geac CD in the default directory.
    - **Customize** to install some of the ADVANCE clients that are on the Geac Client CD, or to install the ADVANCE clients in a directory other than the default installation directory, or to install the French version of the clients. Deselect the clients that you do not want to install by unchecking the client checkboxes. NOTE: You **must** select GEOS2/GeoParms if you are installing any of the clients (with the exception of the Standalone AdvCircOffline client).
  7. The setup program displays the ADVANCE Clients Specifics window pane. Note : this window pane does NOT display if you are installing ONLY GeoCat and/or GeoPac, OR if you have not uninstalled the previous version of AdvCirc, AdvAcq, and/or AdvHoldings. In the **ADVANCE Clients Specifics** window pane, enter the information requested: Licensed To, Host, Account Path, User Name, Password. Then, click **Install now**. The setup program installs the ADVANCE clients, usually in a minute or two. When the ADVANCE clients are installed, the setup program displays a message saying that the ADVANCE clients have been installed successfully.
  8. After the ADVANCE clients have been installed, update GeoParms (Start menu, Programs, GEOS2 Administration, GeoParms). In GeoParms, enter the local server information needed for the ADVANCE or GeoPac/Cat clients to connect to the ADVANCE server. If you want to use the XML and/or SUTRS displays, update the Databases tab in GeoParms, for your local ADVANCE 6.82

server. See GeoParms online help for information on how to perform the update.

NOTE: In the GeoParms Server Selection window, the servers named "Example Geac ADVANCE Cataloguing server" "Example Geac ADVANCE OPAC server" and "Example Geac PLUS server" are samples that may not contain useable port or host name information. In order to function, these sample servers must be updated with your local or remote server information. Enter your local or remote server information in the sample servers' Port and Host Name fields on the Connections tab, change the description, and save the new information. The Databases and Indexes tab information is correct for most ADVANCE servers, unless a specific server has non-default databases or indexes.

9. If you have removed previous versions of clients from your workstation prior to installation of the new clients, see the *Installation Notes* section below, specifically Steps **5d** and **5e**.
10. When you start CircSecure for the first time, enter User ID=**DemoUser** and Password=**GEAC**. This ID and password allows access to CircSecure, where you can define your own User ID and password
11. The English Help files for the ADVANCE Clients **Release 6.04** (released in February 2002), are revised and updated for all the ADVANCE clients. Help is available by pressing **F1** after starting up a client or by double clicking the Help file in the ADVANCE Clients install directory in your workstations' Explorer. Help files for the various ADVANCE clients are identified by the extension '.hlp' and type 'Help File'. For example: Security.hlp, AdvCirc.hlp, AdvAcq.hlp.

## Installation Notes

1. To identify the version and build of your currently installed clients, startup the client and click the Help menu on the client's menu bar. On the Help menu, select the About [clientname] command. The client displays the About window. Client version and build numbers are displayed at the top of the About window.

The versions of the ADVANCE and GeoPac/Cat clients released since February 2002 are listed in the README.TXT file. The README.TXT file is normally found in the Geac Installation directory. This file also contains lists of known problems, and other information that will be useful when installing the AdvClients.

2. Installing the ADVANCE Clients **Release 6.05**, , does **not** require removal (uninstall) of the ADVANCE Clients **Release 6.04, 6.03, 6.02, 6.01, 6.0 update 1, or 6.0 (January 2000)**. **Although it is not required, we recommend as good practice that you follow the**

**instructions specified in Step 3a) below prior to installing the upgrade**

3. If you wish to uninstall previous versions first, follow steps a) to e) below. If you have **GEOS2 5.50** and/or AdvCirc 6.0 Build 214 released in July 1999, or AdvCircOffline 6.0 Build 29 released in July 1999, installed on your PC, and plan to install later versions, you **MUST** uninstall them first, using the following procedures.:
  - a) Before inserting the Geac CD into your workstation's CD drive:

Use GeoParms to export your server definitions to a different directory on your workstation or network.

Use Windows Explorer to copy your MARCTAB.MDB, GEOSEC.MDB, GEOCAT.USR, WORKFORM.LDB, and WORKFORM.MDB files, if present, to another folder on your workstation or network, if you have made modifications to these files since GeoPac/GeoCat or AdvPac/Cat was previously installed.

Use Windows Explorer to make a backup copy of your definitions for the FTPBATCH.BAT and FTPSCRIPT files, if you have defined these files for Offline Circulation transfers. You should also upload any offline circulation transactions resident on your workstation prior to installing the clients.

Delete all geo\* files in your Windows directory.
  - b) Use the *Add/Remove Program Properties* window from the MS Windows Control Panel, to remove the previous version of the clients by removing GEOS2, or AdvClients, depending what you had installed. See MS Windows Help. NOTE: if you had both AdvCirc 6.0 and GeoPac/GeoCat 5.50 in the same directory, both clients will be removed by this process.
  - c) Install the new version of the clients. See the section 2 *Installing the AdvClients*.
  - d) Use GeoParms to import your servers if necessary and reset the local server option. Then replace the newly installed MARCTAB.MDB, GEOSEC.MDB, GEOCAT.USR, WORKFORM.LDB, and WORKFORM.MDB files, if present, with the copies you made at step **a**. After installation, you may need to reenter certain GeoCat setup configuration settings (for example, definitions for the MARC fields to be stripped).
  - e) After installing the new versions of AdvCirc or AdvCircOffline, reenter the CircSecure definitions made for AdvCircOffline. Also replace the newly installed versions of FTPBATCH.BAT and FTPSCRIPT with the versions that you backed up in step **a**.

4. If you get errors preventing startup of any of the clients, you need to upgrade the MDAC version currently installed on your PC. To upgrade your MDAC, as well as MSJet, run the following programs located on your AdvClients installation CD (or network installation directory):
  - \Setup\Misc\DAO\Jet405p3\_Comp.exe
  - \Setup\Misc\MDAC\mdac\_typ.exe

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Software Described – Geac Library ADVANCE Clients – Release 6.05 – February 2002, which includes: AdvAcq, AdvCirc, AdvCircOff, AdvHoldings, AdvMaint, AdvCat, AdvPac, GeoCat32, GeoPac32, and GeoParms32.

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