User Guide (Customer)

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Login

URL: **optimumlibrary.com/login.php**

To login simply enter your **email address** and your **password**. Then hit **Enter** or click **Submit** button.

Click the **Forgot Password** link if you cannot remember your password. A new password will be sent to your email address.

If you click **"Forgot Password"** link without entering your email address you will see the following:

Enter your email address and click **Submit** and you will see the following message informing you that a link to reset your password has been emailed to you.

When you click the link in the email you will be taken to the following:

Just enter the new password in the New Password and enter it again for verification in Repeat Password.

Library Tracker Overview

The Optimum Library Tracker allows to submit library requests in a standardized way that is visible to librarians across different geographic regions.

There are several ways to submit new requests and request items to the Optimum Library Tracker:

1. Enter them directly into the Library Tracker.
2. Use Optimum provided spreadsheet.
3. Provide the data for tracker using your own spreadsheet or data format. You can make a new request and upload the data files for the request items in request's "Uploads" field. The Librarian will be able to download and process the data files.

You have the option to upload datasheets.

Note: The most effective way to submit a request to the Library Tracker is to either enter the request directly into the Tracker or use the spreadsheet we provide. If you choose to submit a request using your own spreadsheet or format additional costs may result.

Also, you can make changes to your company information.

IMPORTANT: Editing works the same for all tables.

Request Page Overview

The "**Edit History**" box tracks changes made to the data on the **Request** page. This information is "read only".

Add New Request

You must be a "Level 2" user to add a new request. If you have permission to add new request, you will see the **New Request Form** just below the Request table.

To add a new request, enter the information needed on the **New Request Form** located right under the requests table.

The division, user name, company name etc will already be entered by the system if you only belong to one division. You can provide an optional **New Project Name** but it is not required. If the division has more than one library, you can select the approprite library from the dropdown list.

New Request Form where user only belongs to one division.

If you the user belongs to more than one division then the user must choose from Division dropdown which division the request is for. That will automatically populate the corresponding Library. The you may also provide an optional Project Name. If the division has more than 1 library you can select the correct library from the dropdown..

New Request Form where user only belongs to more than one division.

In both cases click **Add New Request** button to add the request. The new request will be displayed in request list.

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Edit an existing request

You can edit the information in a cell of the request table by double-clicking that cell. The only editable cells are Project Name and Library. Also, you can Upload files for the request by clicking the Upload button.

The edit Project data just double-click the data you wish to change and change it to its new value then either press enter or tab.

To edit change the Library double-click the Library cell you wish to change and select the new Library from dropdown.

To Upload files click the Upload button. You will see the following dialog.

Click "**Choose files**" to select files to upload. Once you have selected the files to upload click the "**Upload**" button. Click "**Cancel**" to cancel the file upload.

View items associated with a request just click on the request and the associated items appear in the items table below.

Submit a request

To Submit a request click the request to submit in the Requests table and then click the "**Submit**" button at the top of the Request page.

Select request to submit and then click the "Submit" button.

Note: if the button looks like the one shown submit is disable, i.e. you do not have permission to submit a request.

If there are no associated request items you will see a message tell you that you cannot submit a request without associated items.

If the request is successfully submitted you will receive a message that the request number has been successfully submitted and the request will turn red.

Note: you can still add request items and edit the request/request items after the request is submitted.

Suspend Request

Suspending a request stops all work on that request. Any work performed on the request before suspension is still billed. Requests cannot be deleted because a record of the request and work performed must be maintained by the Library Tracker.

To suspend a request select the request in the request table and click "**Suspended Request**" button. A suspended request is displayed in brown.

First select the request to be suspended then click the "Suspend Request" button.

The reactivate (unsuspended) a suspended request just select the suspended request by clicking on it and click the **"Activate Request"** button. The "**Suspend Request**" button becomes the "**Activate Request**" button if a suspended request is selected.

"Add Contacts"

The "**Add Contact**" button at top of page allow you to assign additional users that can work on a request.

To assign users you first click on the request you want to assign users to. Click the "**Add Contact**" button. Check the users who can edit this request.

You can remove assigned users by the same process but just uncheck them.

Note: the assigned users contact info will be associated with the request.

To add contacts. First select request then click the "Add Contact" button.

View only your requests.

To show only the requests you have submitted click the **"View Mine"** button.

To view only Requests you have submitted click the "View Mine" button.

Click the "**View All**" button to see all requests.

Note: The **"View Mine"** button is a toggle. It changes to "**View All**" after you click "**View Mine**".

Add a new request item

You must be a "Level 2" user to add a new request item. If you have permission to add new request you will see the New Request Item Form just below the Request item table.

To add a new request item you select the request in the request table. Then provide the information need on the **New Request Item Form** located right under the requests item table.

In both cases click **Add Request Item** button to add the request. The new request item will be displayed in request item list.

Once the form is filled click "Add Request Item" to add that item to the request database.

Fill In New Request Item form fields (not all fields shown).
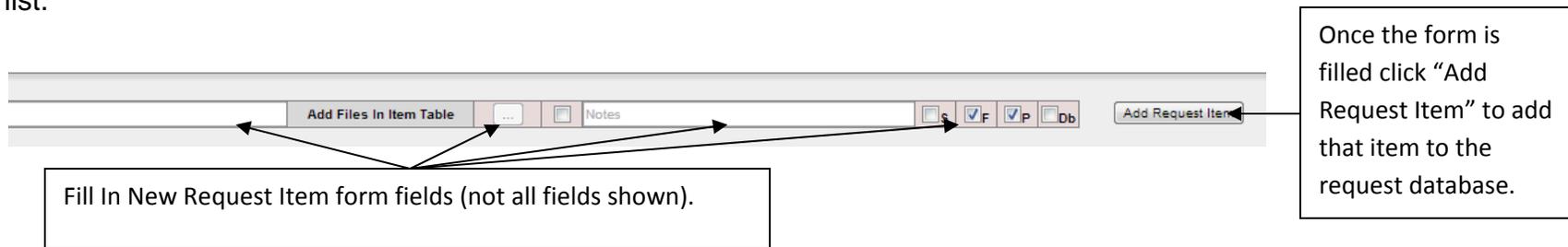
Edit an existing request item

Editing information in the request item table works exactly the same as the request table. For plain text fields you simply double-click the cell that contains the information you want to change, make the change and then press enter your tab to continue.

For checkbox fields simply click the check box to toggle the checkmark.

To select data files click the file upload button to the right of the data dropdown. The click "**Choose file**" . After choosing file then "**upload**" to upload the file.

Change the order of request items

First click the request item you want to move. To move the item up one row in the table click "**Move Up**" to move the item down one row in the table click "**Move Down**".
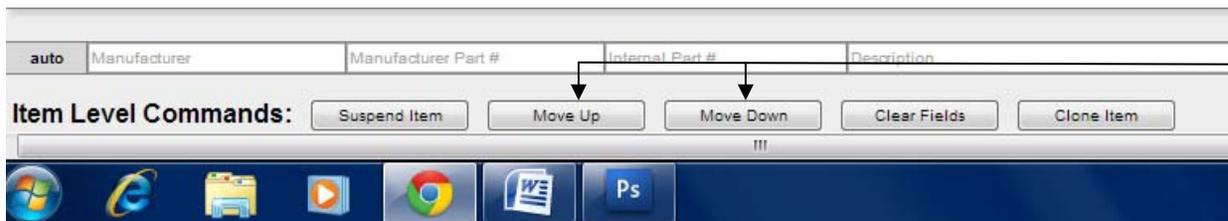
First select the request item you want to move and then click either the "Move up" button to move it one position up or "Move down to move it one position down.

Suspend a request item.

Click the request item you want to suspend and then click the "**Suspend Item**" button .

First select the request item you want to move and then click either the "Move up" button to move it one position up or "Move down to move it one position down.

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Clone Request Item

To save time when creating a new request item that is similar to another request item simply select the similar request item and click "**Clone Item**" button. This will create a copy of the selected request.

To make a copy of an existing request item first select the item to be copied and then click the "Clone Item" button.

CUSTOMER

Customer Page Overview

You get to the Customer page by clicking the "Customer Page" link on the Request page.

If you have sufficient permissions the Customer Pages lets you specify new Divisions for your company. Add New Libraries and New users. Libraries are associated with divisions and users are associated with divisions and libraries. A division can have any number of libraries and users can belong to one or more divisions of the company. Each user has a default library which is one of the libraries for the divisions they belong to. If user does not specify a library for a request the default library will be used for that request but the user can override this when creating a request.

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Add Division

To add a new division for your company fill out the New Division form (see Company Page Overview) and click the Add button.

Note: you must have "Level 2" permissions to do this. If you need to by able to add/edit company information please contact your companies "Primary User" for permission.

Fill in Division Name, Street Address, etc.

Click Add button to add new division to database.

Click "Clear" clear all entries and reset form

Edit Division Information

Editing works the same on all tables in the Library Tracker. If you have permission you can edit a text field by double-clicking the cell containing the data to edit, changing the data, and then pressing enter or tab to accept the changes.

Checkboxes are toggles and simply clicking the checkbox will change it from unchecked to checked or vise versa.

	City	State	ZIP	Country	Phone
	City2	OP	68465	Country2	(596) 733-4
	Street Address	ST	99999	Country	(898) 999-8989
	City	ST	88888	Country	(323) 432-3423
	City3	ST	33333	Country3	333.333.3
	DK	SA	49032	COUNTRYa	390.230.2
	sdkfa	alskd	392	3920	2390

Double-click the cell to edit and change its content. The press Enter or Tab.

Make Division Inactive

	Phone	Status
	(596) 733-4348	Inactive
	(898) 999-8989 ext. 888	Active
	(323) 432-3423 ext. 423	Inactive
	333.333.3333	Active
	390.230.2390	Inactive
	2390	Active

Double-clicking the "Status" cell for a division will toggle between "Active" and "Inactive".

Add New Library

Fill out the Library form located directly beneath the Library table and click the "Add" button to the right of the form to add the Library to the Database. See Customer Page Overview.

See Associate Library With Divisions to assign the library to divisions.

Edit Library Information

To edit a "Text" cell double click the cell and change the contents. Press Tab or Enter when finished editing.

To delete a library::

1. Select the Library by clicking on it in the Library table.

2. Click the "**Delete Library**" button.
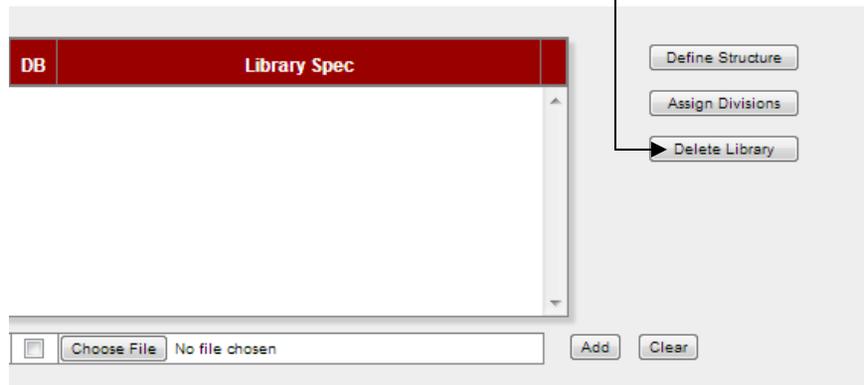
Define Structure

Define Structure means to specify the partitions for the selected library. You specify any number of Symbol, Footprint, Part and Database partitions.

To define the library structure:

1. Select the Library by clicking it.

2. Click the "**Define Structure**" Button
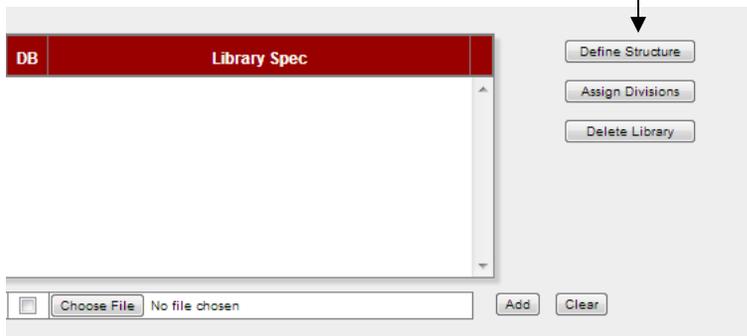
Then you will see the DEFINE LIBRARY dialog.

DEFINE LIBRARY

Symbol	Footprint	Part	Database
Symbol 1	Footprint 1	Part 1	Database 1
Symbol 2	Footprint 2	Part 2	Database 2
Symbol 3 edit	Footprint 3	Part 3 edit	Database 3 edit
Symbol 4 edit	Footprint 4 edit	Part b	Database 4
Symbol 5	Footprint a		database 5
Symbol 7	Symbol 6		
symbol z	Symbol 7		

Newly Added Partions will immediately show up in the appropriate list.

Enter the name of the Symbol, Footprint, Part or Database partition and click the respective "Add" button.

Add Symbol Location | Add Footprint Location | Add Part Location | Add Database Table

Delete Location

Select a Partition and click Delete Location button to remove it from list.

Close

Associate Library with Divisions

To associate a library with one or more divisions first select the library by clicking on it and then click the "**Assign Divisions**" button to the right of the Library table.
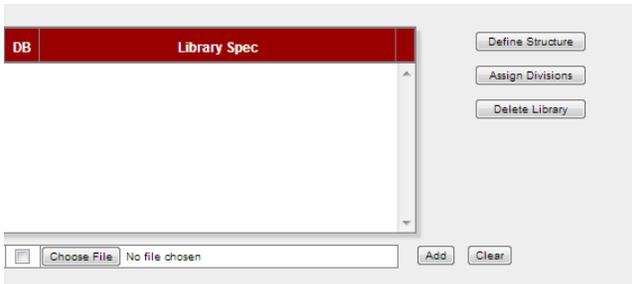
First select a library then click this button.

Then you click the "**Assign Divisions**" button you will see the following:
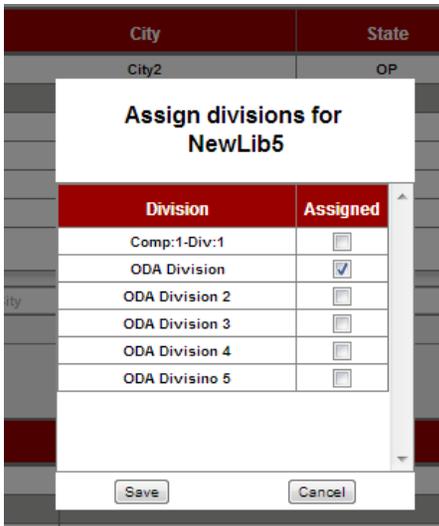
Check which Divisions are associated with the selected library. Uncheck any that are no longer valid. (You can check one or more of the divisions listed.)

Click "Save" to save the assignments or "Cancel" to close without saving changes.

Add New User

Fill out the New User form located directly beneath the User table and click the "add" button to add the User to the Library database. Click the "Clear" button to clear the form. See Customer Page Overview.

To Assign Divisions click the button to right of User Table to associate the user with one or more divisions.

Edit User Information.

To edit a user text information just double click the cell you wish to edit and change the contents then press enter or tab key.

Reset Password

To reset password click the "Reset Password" button to the right of the user table.
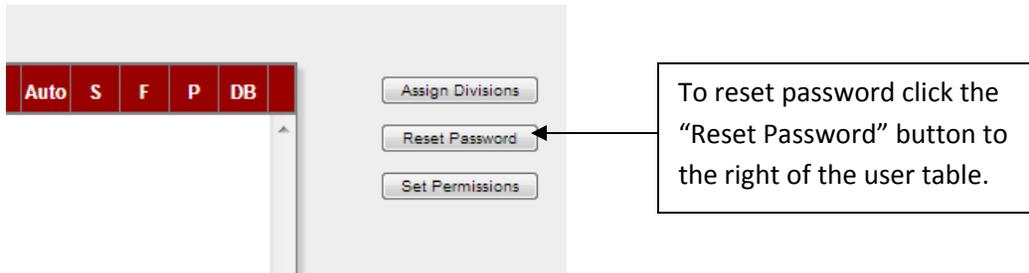
Set Permissions

Your "Level" determines what you are able to do on the Customer page and Request Page.

First click the user then click the "Set Permissions" button to the right of the User table.
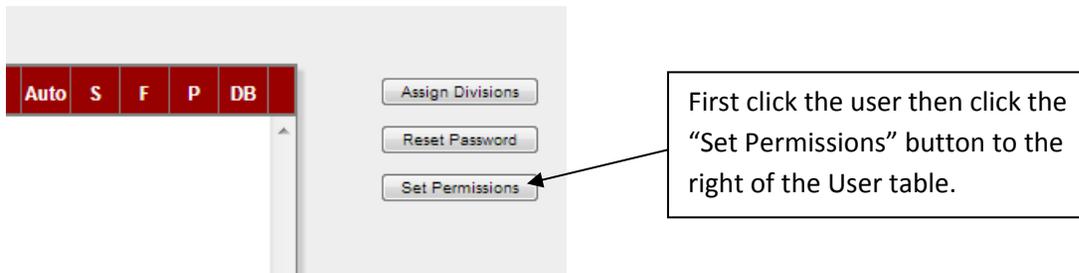
When you click the "**Set Permissions**" button the Edit Page Permissions dialog pops up.

Name of selected user whose permissions are being edited.
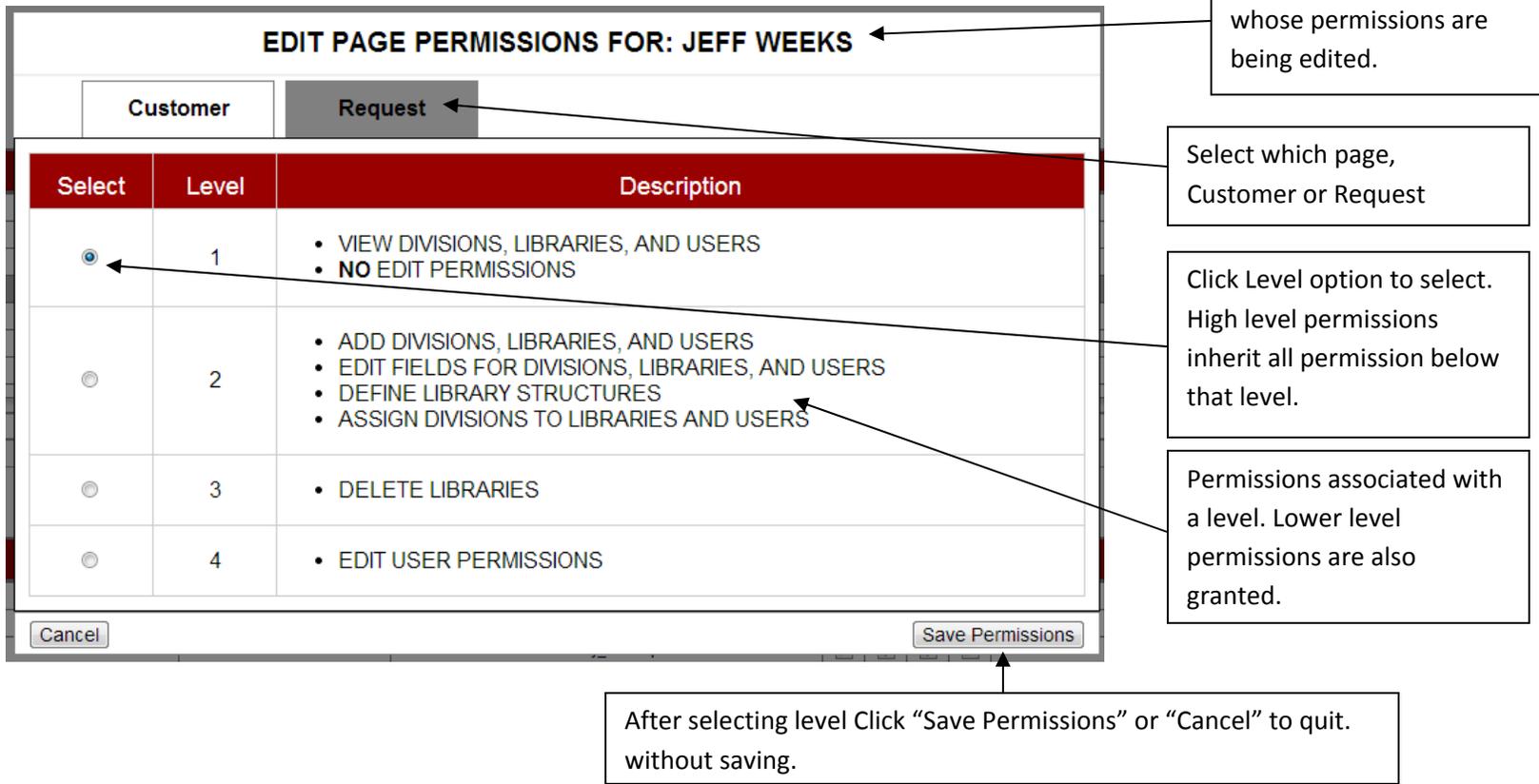
EDIT PAGE PERMISSIONS FOR: JEFF WEEKS

Customer	Request

Select which page, Customer or Request

Select	Level	Description
⦿	1	• VIEW DIVISIONS, LIBRARIES, AND USERS • **NO** EDIT PERMISSIONS
○	2	• ADD DIVISIONS, LIBRARIES, AND USERS • EDIT FIELDS FOR DIVISIONS, LIBRARIES, AND USERS • DEFINE LIBRARY STRUCTURES • ASSIGN DIVISIONS TO LIBRARIES AND USERS
○	3	• DELETE LIBRARIES
○	4	• EDIT USER PERMISSIONS

Click Level option to select. High level permissions inherit all permission below that level.

Permissions associated with a level. Lower level permissions are also granted.

Cancel | Save Permissions

After selecting level Click "Save Permissions" or "Cancel" to quit. without saving.

Associate Users with Divisions

Auto	S	F	P	DB

Assign Divisions

Reset Password

Set Permissions

To assign a user to one or more divisions first click the use to select then click the "Assign Divisions" button.

When you click the "**Assign Divisions**" button you will see the popup below.

City2   OP

Assign divisions for Isaac Koech

Division	Assigned
Comp:1-Div:1	☑
ODA Division	☑
ODA Division 2	☐
ODA Division 3	☐
ODA Division 4	☐
ODA Divisino 5	☐

Save   Cancel
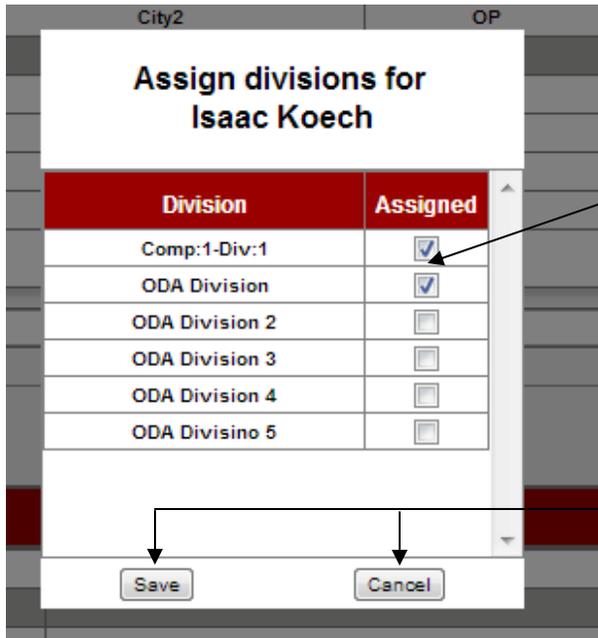
Check the divisions the selected user belongs to uncheck any they do not.

Click "Save" when finished or "Cancel" to quit without saving.