**A Simple Copy Cataloging Workflow in ALEPH v. 18**

**A – Finding a bibliographic record to copy**

1. In the Search Tab (Binoculars), select the **Find** node – locate a record in USM01 using the various search options you were shown in your “Getting Around” session.

Choose a record from the displayed list. Click on the **Show** button to display the record in full format. Check that it is the record you want to copy (note that there won’t be a **Show** button if your search retrieves an exact match).

**B – Duplicating that record and changing it**

2. Click on the **Cataloging** button in the lower pane to open the record for editing.

3. Press **CTRL + N** to duplicate the record to USM01 (i.e., to make it a local record).

4. Change the record (in upper pane) as dictated by your departmental policies.

5. Save it to the server (**CTRL + L**) – make sure it’s being saved in the right bibliographic library (USM01 in our training), and then click **Continue**.

6. You may get some record validation messages at this point. For this exercise, just click on the Override button to disregard them.

**C – Creating a holdings record**

7. In the bottom right pane, select – **Tab 4. (HOL)** – click on **Create** (you’ll be starting the creation of a holdings record).

8. Click on **Edit** (in the lower pane) and edit the holdings record (in the upper pane) as your department’s policies dictate.

   For **field 852 (Location)**: the call number ($$h$$ etc.) is copied from the 050 field in the bibliographic record, if it exists.

   Subfield $$b$$ (**Sublibrary**) is mandatory in our training environment so use one of the following 3-letter values for this subfield:

   - MED - Medicine Library
   - HYL - East Asian Library
   - HIL - Humanities Library
   - LAM - Main Undergraduate
   - LAW - Law Library
   - LIT - Economics Library
   - MUS - Music Library
   - WID - Main Library

To add a subfield, right-click with your cursor on the 852 field.
After you finish editing the 852 field, send the holdings record (make sure you use USM60) to the server.

D – Creating items
9. In the bottom left pane – expand the USM50 library node (click on the + in the box) until you see the Items line – double-click on the Items line (you’ll be taken to the Item tab so you can create an item record).

10. Click on New – start by completing the “Hol link” field in the bottom pane (this will link this item to the Holdings record you just created) – click Refresh which will automatically fill in fields and prompt you for areas not completed. The call number will be copied from the Holdings record to the Item record.

11. Erase the existing barcode and wand in your barcode – Fill in the following: Material type, and Item status – (notice that your institution’s policies may require you to fill in additional fields as well). Click on Add. Your item is now created.

   Tips: If you click on Refresh after filling in each field, the system will prompt you for mandatory fields. If you save the item record (i.e. click on Add) without filling in the barcode field, it will be filled in automatically by the system.

E – Checking what it all looks like to the end user
12. Check how it will look to the end user by doing a search on your record in the Web OPAC. To do so in Cataloging, double-click on the USM01 record in the Records Tab and press CTRL + O. Look in the lower pane, Tab 3. Browser area.

   From the OPAC: open an Internet session and point your browser to http://yourserver:yourport/F, and search for the record.