



Staff User's Guide – Cataloging

Version 22

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1 Cataloging Overview

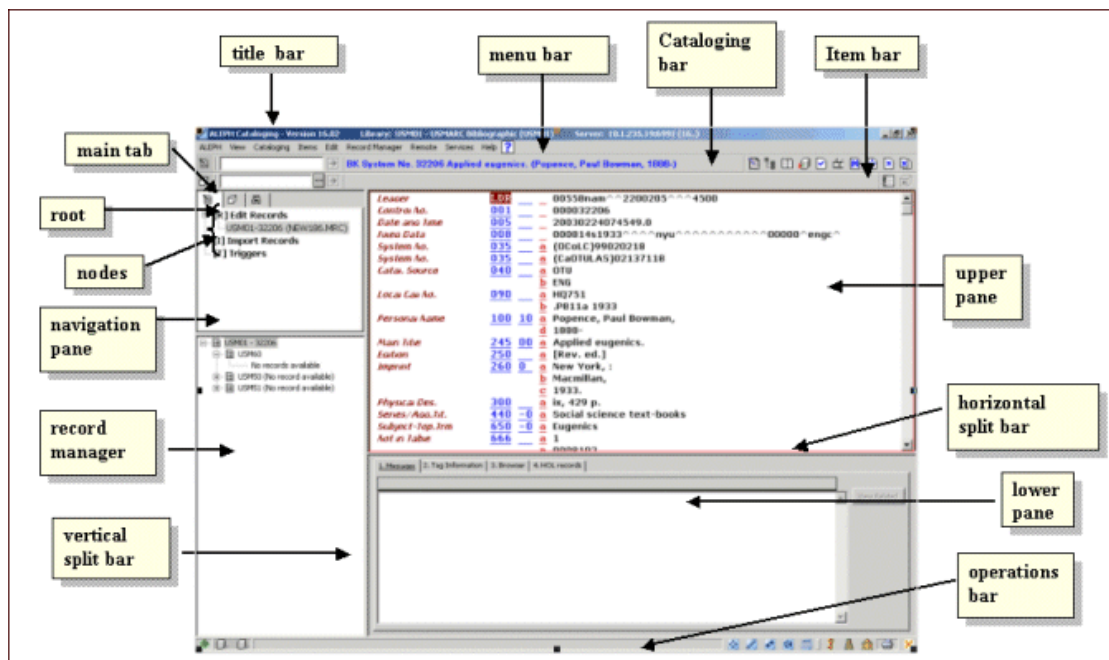
You can use the Cataloging tab of the ALEPH Cataloging module to create, edit, and delete cataloging records. This overview includes the following sections:

- Offline Cataloging
- Passwords and Authorizations
- The Cataloging GUI
- The Cataloging Process
- Type of Records
- Working Without a Mouse

1.1 The Cataloging GUI

The Cataloging GUI has been designed with an emphasis on usability and ease of access to cataloging functions.

Here is an example of a Cataloging GUI screen displaying the Catalog Editor:

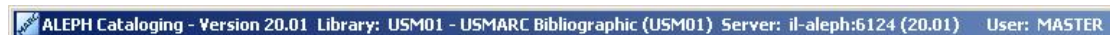


The various screen elements in the Cataloging GUI (as shown above) are explained in the following sections.

1.1.1 Toolbars

Title bar

The title bar shows the name of the program. It also displays status messages relating to the program and to user commands:



Menu bar

The menu bar is laid out conventionally:




Place the cursor over the menu name (for example, Cataloging) to reveal the related menu commands.

Cataloging bar

The Cataloging bar contains brief information about the record being edited, such as record format, system number and title:



To retrieve a record from the database, enter the system number of the record in the field, and click , or press Enter.

Open Template



Click the Open Template icon from the Cataloging bar to select a predefined template for the creation of a new record.

Overview Tree



Click the Overview Tree icon to view the records in the system that are related to the cataloging record being edited. The information is displayed in tree structure.

Split Editor Mode



Click the Split Editor Mode icon to split the Catalog Editor into two sections for viewing and/or editing two cataloging records simultaneously.

Full Screen



Click the Full Screen icon to display as much as possible of the cataloging record currently being edited on the screen. This option can also be used to display as much as possible of the lower pane.

Save on Server and Local Drive



Click the Save on Server and Local Drive icon to save on the server any changes you have made to the record displayed in the Catalog Editor. The record will also be saved on your local drive.

Check Record



Click the Check Record icon to check the current record.

Activate Keyboard



Click the Activate Keyboard icon to activate a keyboard that enables you to enter characters that are not integrated into your standard keyboard.

View in Search



Click the View in Search icon to transfer to the Search function to see the Full View of the record displayed in the Catalog Editor.

Open Acquisitions Record



Click the Open Acquisitions Record icon to see ordering information for the current bibliographic record. You will be transferred automatically to the Acquisitions/Serials module.

Close Record



Click the Close Record icon to close the record that is currently displayed in the upper pane of the Cataloging tab.

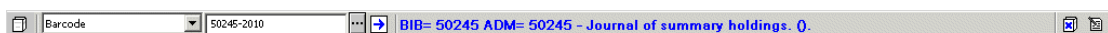
Close All Records





Click the Close All Records icon to close all the records that are currently open.

Item Bar

The Item bar contains brief information about a selected item, such as title, author, and barcode number:



To display an item record select a search parameter (such as BIB Sys. No., ADM Sys. No., Barcode, Call Number, and so on) from the drop-down menu on the left. Type the appropriate number in the adjacent field. You can click  to retrieve a Call Number from the Call Number List window.

Click  or press Enter.

The Item bar contains the following icons:

Clear Item



Click the Clear Item icon to clear the loaded item and empty the item tree and its panes.

Edit BIB Record



Click the Edit BIB Record icon to be transferred to the BIB record that the item record is linked to.

1.1.2 Panes

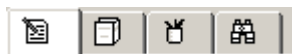
Navigation Pane

The navigation pane contains the following:





- main tab
- navigation tree

Main Tab

The main tab consists of a row of icons that correspond to the major activities in Cataloging:



Clicking an icon invokes the interface associated with that icon. For example, clicking the Items icon invokes an interface for conducting item-related activities.

Name	Icon
Cataloging	
Item	
Administration	
Search	

Cataloging Tab Navigation Tree

The Navigation tree contains the following nodes:

- **Edit records:** the list of records that have been called up on the workstation displays; select a record to display it in the cataloging draft view in the right pane. See Editing Records on page 28 for details on the editing functions.
- **Import records:** changes the right panes to importing records mode. See Importing Records on page 105 for details on importing records.
- **Triggers:** changes the right pane to trigger list mode. See General Chapter, Triggers section for details on the triggers functions.

1.2 Working Without a Mouse

You can advance from one pane to another by using the following shortcut keys:

Shortcut Keys	Lets you do this
TAB	move to the next control in the dialog box.
Shift+TAB	move to the previous control in the dialog box.
Ctrl+TAB	move from the first control in the top toolbar to the lower pane.
Ctrl+Alt+TAB	move from the right lower pane to the first control in the top toolbar.
Ctrl+1	move to the left pane, containing a navigation tree.
Ctrl+2	move to the right upper pane or to the left editor window in multiple view in Cataloging, or to the right upper pane if there is a single editor window.
Ctrl+Shift+2	move to the right editor window in multiple view in Cataloging.
Ctrl+3	move to the right lower pane.
Ctrl+4	move to the left lower pane, containing a navigation tree.
Ctrl+5	move to the first edit or combo field in first line of the top toolbar.
Ctrl+6	move to the first edit or combo field in the second line of the top toolbar.

Note that a frame appears around the active pane.

Shortcut Keys Available in the Cataloging GUI

The following table shows the default shortcut keys. These shortcut keys can be customized.

Shortcut Key	Action
Ctrl+K	Activate Keyboard
Ctrl+W	Check Field
Ctrl+U	Check Record
Ctrl+C	Copy
Ctrl+T	Copy Field(s)
Ctrl+D	Copy Record
Ctrl+S	Copy Subfield(s)
Ctrl+X	Cut
Ctrl+F5	Delete Field(s)

Shortcut Key	Action
Ctrl+R	Delete Record
Ctrl+F7	Delete Subfield(s)
Ctrl+N	Duplicate Record
Ctrl+F12	Enter Text Mode
F11	Enter Unicode Value
Ctrl+E	Expand from Template
F5	New Field (Choose from List)
F6	New Field (User-Defined)
F7	New Subfield
Ctrl+F	Open Form
Ctrl+A	Open Template
Ctrl+V	Paste
Alt+T	Paste Field(s)
Alt+D	Paste Record
Alt+S	Paste Subfield(s)
Ctrl+P	Print
Ctrl+G	Records Navigation in record tree pane
Ctrl+Y	Redo
Ctrl+L	Save on Server and Local Drive
F3	Search Field Heading of Current Library
Ctrl+F3	Search Field Heading of Other Library
F4	Search Subfield Heading of Current Library
Ctrl+F4	Search Subfield Heading of Other Library
Ctrl+F8	Search Subfield Options
Ctrl+M	Sort Record
Ctrl+B	Switch to Admin
F8	Switch to Item Tab
F2	Switch to Record Tab
F9	Switch to Search Tab
Ctrl+Z	Undo
Ctrl+O	View in Web OPAC

The F1 shortcut key for Help is hard-coded and cannot be customized:

1.3 Cataloging Process

You can catalog in ALEPH either in free format or via pre-designed forms. Because of the variable content of records and the need to provide for different types of materials, the system does not impose any restrictions and enables free cataloging. Therefore the cataloger may enter as little or as much information as he needs.

To facilitate the cataloging process, ALEPH incorporates:

- Pre-designed forms, including forms for fixed-length fields (for example, for the 008 MARC 21 field and for the 100 UNIMARC field).
- Pre-designed templates for the body of the record.
- Comprehensive help, which is available on tags and subfields at all times during data entry.
- Check routines which are user-defined and site-specific.

1.4 Type of Records

The Cataloging module in ALEPH supports four types of records:

- Bibliographic records
- Authority records
- Holdings records
- Administrative records

The first three types can be created, updated and deleted through the Cataloging module. An administrative record is for internal use and is automatically created by the system. It is unusual to edit or update an administrative record through the Cataloging module.

Bibliographic records: A bibliographic record commonly includes titles, names, subjects, notes, publication data, and information about the physical description of an item.

Authority records: Authority records contain authoritative information concerning: the standard forms of names and subjects to be used as access points on bibliographic records; the forms of these names and subjects that should be used as references to the standard forms; the interrelationships among these forms.

Holdings records: Holdings records contain holdings and location information for bibliographic items.

Administrative records: Administrative records, commonly referred to as ADM records, are linked to bibliographic records. Attached to the administrative record are: item level information; acquisitions; circulation; and item-specific copy and arrival data. The administrative record can also be used to store the 853/853X fields that are used to define publication prediction and to create issues for serials.

1.5 Passwords and Authorizations

Cataloging functions require a password and are limited to authorized users. Password authorization can be given per function or globally for all functions (see the Staff Privileges user guide module) .

Update access to all types of MARC records is controlled by a special ALEPH field, the OWN field. This field works in accordance with the password information defined for the user (see "OWN" Field on page 99).

Also at the record level, catalogers are assigned allowed and denied tags for editing.

1.6 Offline Cataloging

The Offline Cataloging option enables you to work with the Cataloging tab and catalog records without having a server connection. You can access functions such as Tag Information and Open Form that rely on data that has already been downloaded onto your local PC. Other functions that rely on the server, such as searching field headings, checking the record or the values entered in a form, are unavailable until the server connection is restored.

Note

When working in offline cataloging mode, you must save the records on your local drive. When the server connection is restored, the cataloged records must be sent to the server for the database update.


You can switch manually to the offline cataloging mode by clicking the Offline Cataloging option on the Cataloging menu. To restore online cataloging, click again the Offline Cataloging option from the Cataloging menu.

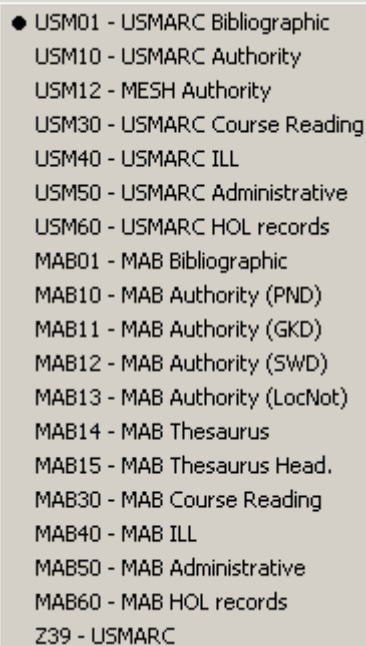
2 Home Library

This chapter includes the following sections:

- Connecting Automatically to a Home Library
- Importing Library Tables
- Automatic Import of Updated Tables

Although you can work with records from several libraries at the same time, you must first connect to a Home Library. Thereafter, when you open a new record, it is marked as belonging to the Home Library, and when you call up a record number from the server, it is retrieved from the Home Library.

1. To activate the 'Choose a Library' function and connect to a home library, right-click the  icon at the bottom right of the screen or select the 'Connect to' option from the ALEPH menu. The following menu is displayed:



● USM01 - USMARC Bibliographic
USM10 - USMARC Authority
USM12 - MESH Authority
USM30 - USMARC Course Reading
USM40 - USMARC ILL
USM50 - USMARC Administrative
USM60 - USMARC HOL records
MAB01 - MAB Bibliographic
MAB10 - MAB Authority (PND)
MAB11 - MAB Authority (GKD)
MAB12 - MAB Authority (SWD)
MAB13 - MAB Authority (LocNot)
MAB14 - MAB Thesaurus
MAB15 - MAB Thesaurus Head.
MAB30 - MAB Course Reading
MAB40 - MAB ILL
MAB50 - MAB Administrative
MAB60 - MAB HOL records
Z39 - USMARC

2. Use the up and down arrow keys to highlight the desired database or point to it with the mouse pointer and double-click.

2.1 Connecting Automatically to a Home Library

You can set the system to connect automatically to a particular Home Library as soon as you enter the Cataloging module. To do this, follow these steps:

1. Go to the CATALOG/TAB directory of the client and open the PER_LIB.INI file located there. It lists valid libraries. Make sure that the library you want to be automatically connected to appears at the top of the list.
2. Go to the ALEPHCOM/TAB directory of the client and open the ALEPHCOM.INI file. Make sure that the DataBaseAutoSelect flag is set to **Y**.

2.2 Importing Library Tables

When you connect to a Home Library, the system checks to make sure that the Cataloging module is using the most recent version of the database tables.

If the tables have been changed since the last time you connected to the library, you will be asked if you want to load the library tables now. It is recommended that you choose 'Yes'. This will ensure the correct functioning of several features, such as the cataloging templates, the forms, and the Help screens.

If you choose 'No', you can load the library tables later by connecting again to the library.

2.3 Automatic Import of Updated Tables

You may set the system to automatically load updated tables when you enter the Cataloging module, without a message being displayed.

To automatically load updated tables, go to the ALEPHCOM/TAB directory of the client and open the ALEPHCOM.INI file located there. Make sure that the AlwaysImportFiles flag (under [Package]) is set to Y.

Next time you connect to a Home Library, if the tables have been updated, they will be automatically loaded to the client.

3 Creating Records

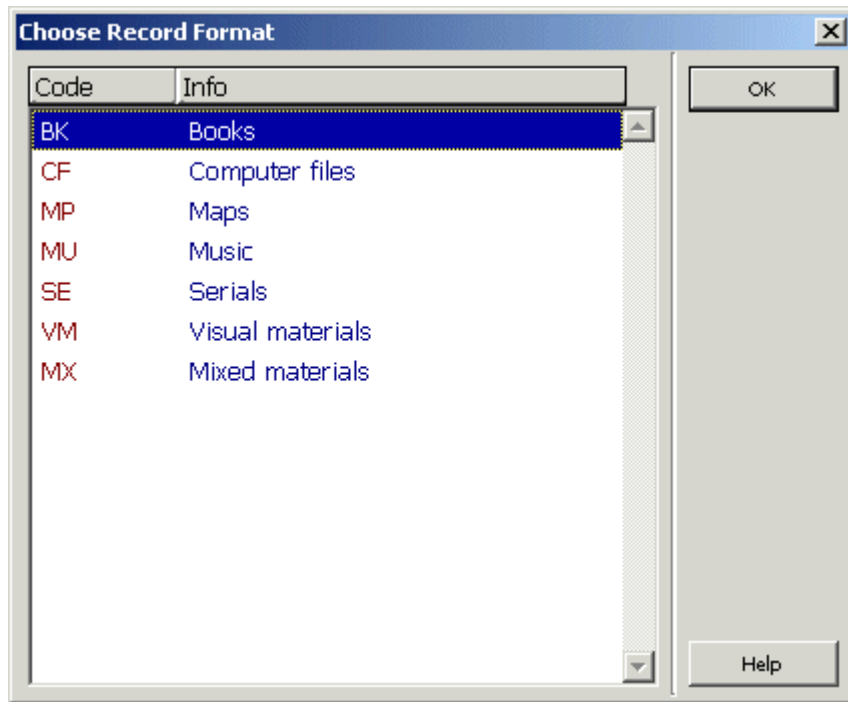
There are a variety of ways to create a new record:

- Open New Record
- Open Template
- Duplicate Unopened Local Record
- Duplicate Any Open Record
- Create Administrative (ADM) Records
- Create Holdings (HOL) Records

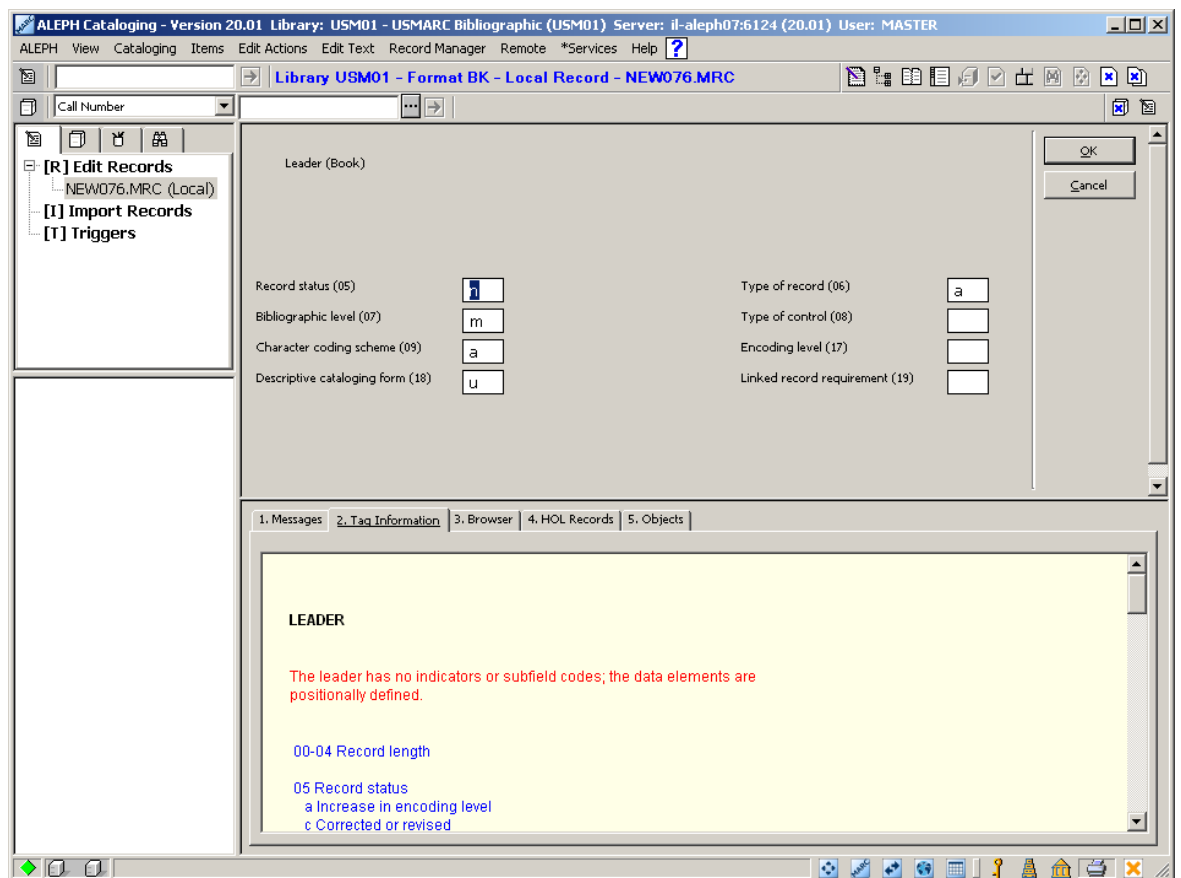
3.1 Open New Record

This function enables you to create a new record from scratch. To do this, follow the steps below:

1. Select New Record from the Cataloging menu.
2. Highlight the appropriate format for your record from the Choose Record Format dialog box (that is, book, serial, and so on), and click **OK**. A form for the leader (LDR field) is displayed in the upper pane:



The Tag Information tab of the lower pane provides a guide to the valid values for filling in the form:

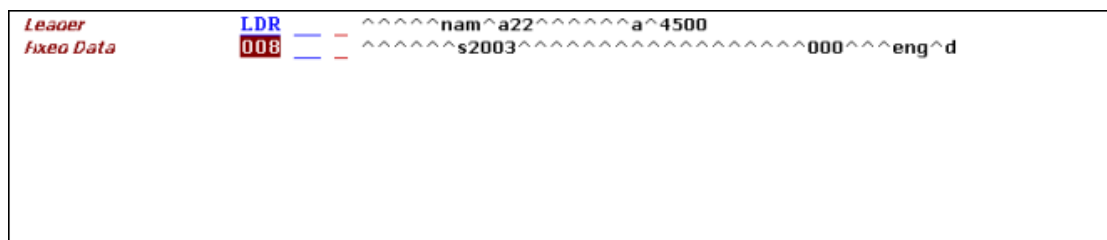


After you finish editing the form, click **OK**. If the form has been set to be verified for correctness, the system checks for potential errors.

If errors have been found, the error messages are shown in the Messages tab of the lower pane. The system displays a prompt informing you that checking the field reported warnings and asks if you are sure that you want to close the form.

You can define default fields for new records. If a field with a form has been defined as a default field, then the form of the field is displayed after closing the form for the LDR. For example, in MARC 21 format libraries, it is common to define the 008 field (Fixed length data elements) as a default field for all new records. In this case, after closing the form for the leader, the form for the 008 field is displayed. If the field does not have a form, it is added empty to the cataloging draft for the cataloger to fill in.

Following the editing of the forms, a new record is created with default-required fields (that is, the 008 field in MARC 21) and the required leader. The new record is displayed in the Catalog Editor (upper pane).




The record automatically receives a temporary filename that begins with the prefix "NEW" and a number.

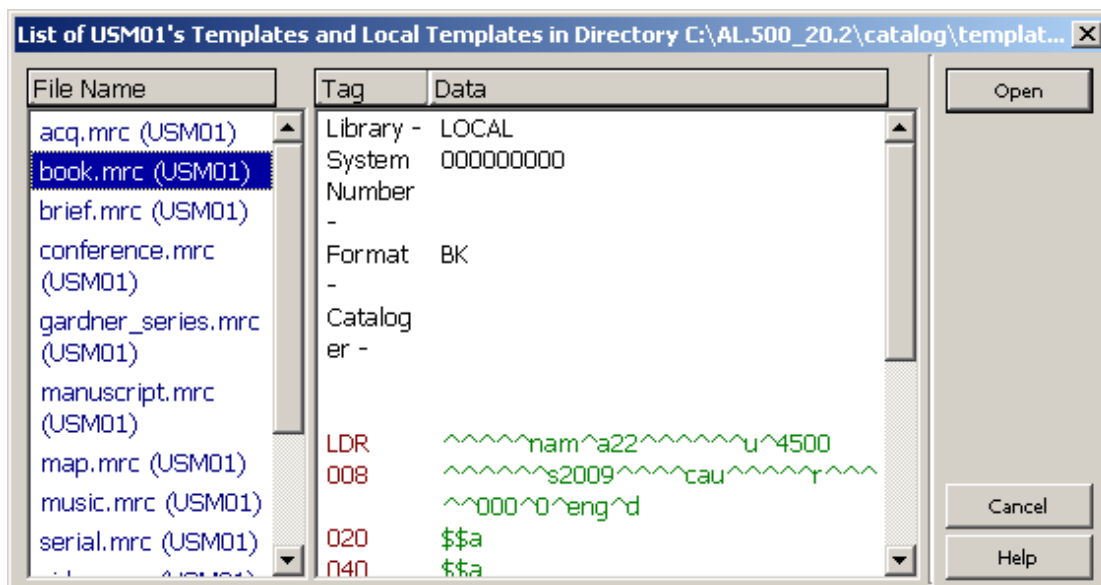
You can continue adding fields and subfields to the record (see Editing Records on page 28).

3.2 Open Template

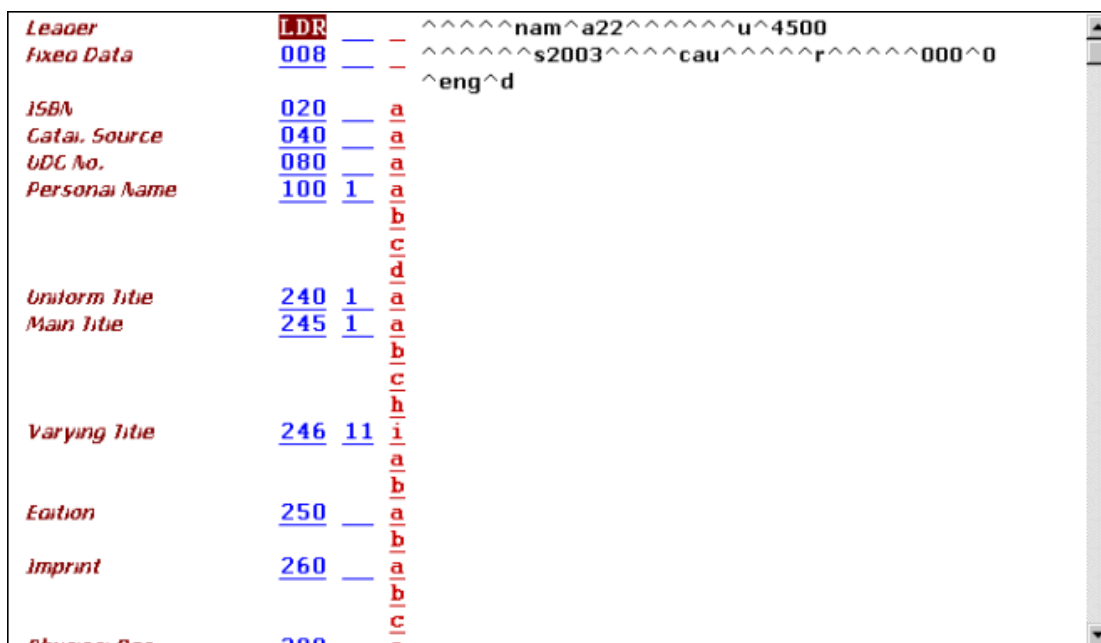
This function enables you to create a new record based on a pre-defined template. To do this, follow these steps:

1. Select the **Open Template** option from the Cataloging menu or click the  icon from the Cataloging bar.

Select the appropriate template from the List of Templates dialog box. Different templates can be created and used for various physical formats (for example, the MARC 21 formats), types of materials (for example, books, serials), and so on (see Creating Templates on page 104).



2. A new record is created with a full range of available fields. The content of each field is often blank. The template determines the text and subfields that are included. For more information see Creating Templates on page 104. You can now continue editing records. The Tag Information tab of the lower pane provides a guide on the use of valid indicators, subfield codes and values for the highlighted field.
3. You can fill in the content of a field or subfield by typing directly, by searching field or subfield headings, or by searching subfield options.

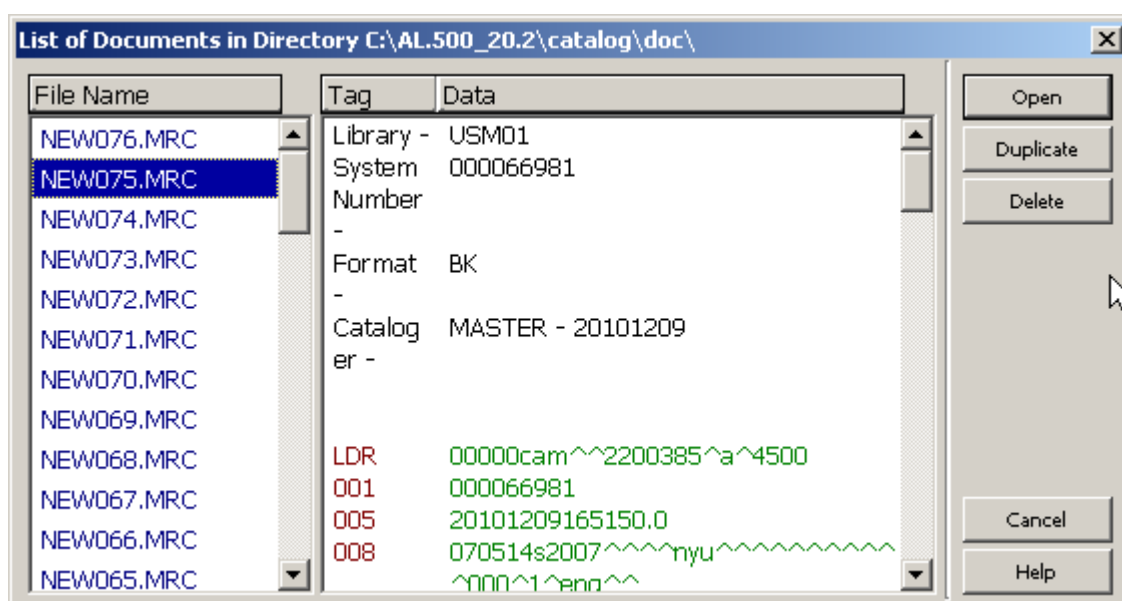


The record automatically receives a temporary filename that begins with the prefix "NEW" and a number.

3.3 Duplicate Unopened Local Record

This function enables you to create a new record by duplicating an unopened one that is located on your local drive. To do this, follow these steps:

1. Select Open Record on the Local Drive from the Cataloging menu.
2. A list of records is displayed. Highlight your desired record. A preview of the contents of the record is displayed on the right side of the window.



3. Click the Duplicate button on the list of records. A copy is made of the highlighted record and a new local filename is assigned with the prefix "NEW". You can now edit the copied record.

3.4 Duplicate any Open Record

This function enables you to copy the currently displayed record and then edit the copy. The new record is located on your local drive and a new local filename is assigned with the prefix "NEW".

To use this function with the currently displayed record, use the Ctrl+N shortcut key or select Duplicate Record from the Cataloging menu.

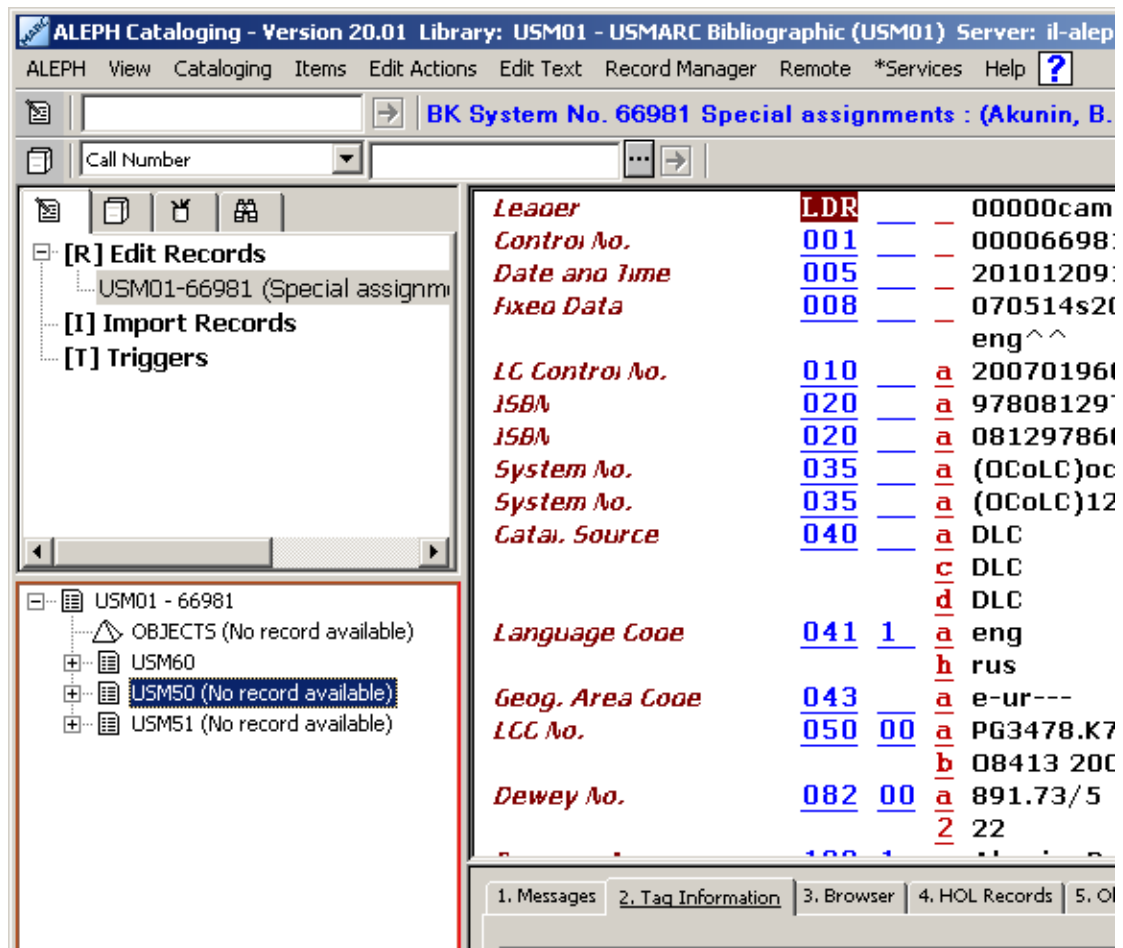
Depending on how your System Librarian has set up the Duplicate Record function, you may be able to choose the library in which you want the new record saved.

This can be defined in the CATALOG.INI file in the CATALOG/TAB directory by customizing the [DuplicateRecord] section.

3.5 Create Administrative (ADM) Records

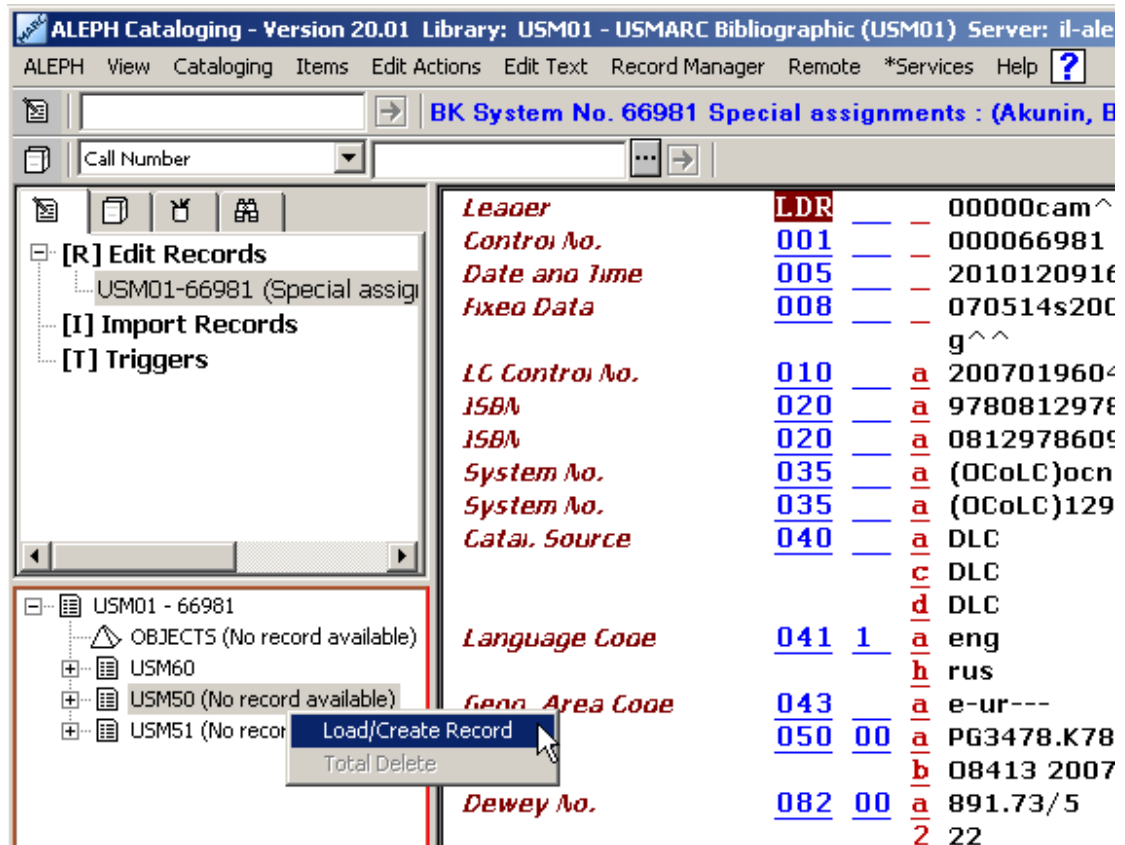
Administrative (ADM) records can be created through the Record Manager of the Cataloging tab (lower section of the left pane).

If no administrative record is linked to the bibliographic record, the message "No record available" is displayed next to the administrative library node.



To create an administrative record follow these steps:

1. Highlight the administrative library node.
2. Choose the Load/Create Record option from the Record Manager menu or by selecting the same option when right-clicking on the administrative library node:



This option automatically creates the administrative record and displays it for editing.

3.6 Create Holdings (HOL) Records

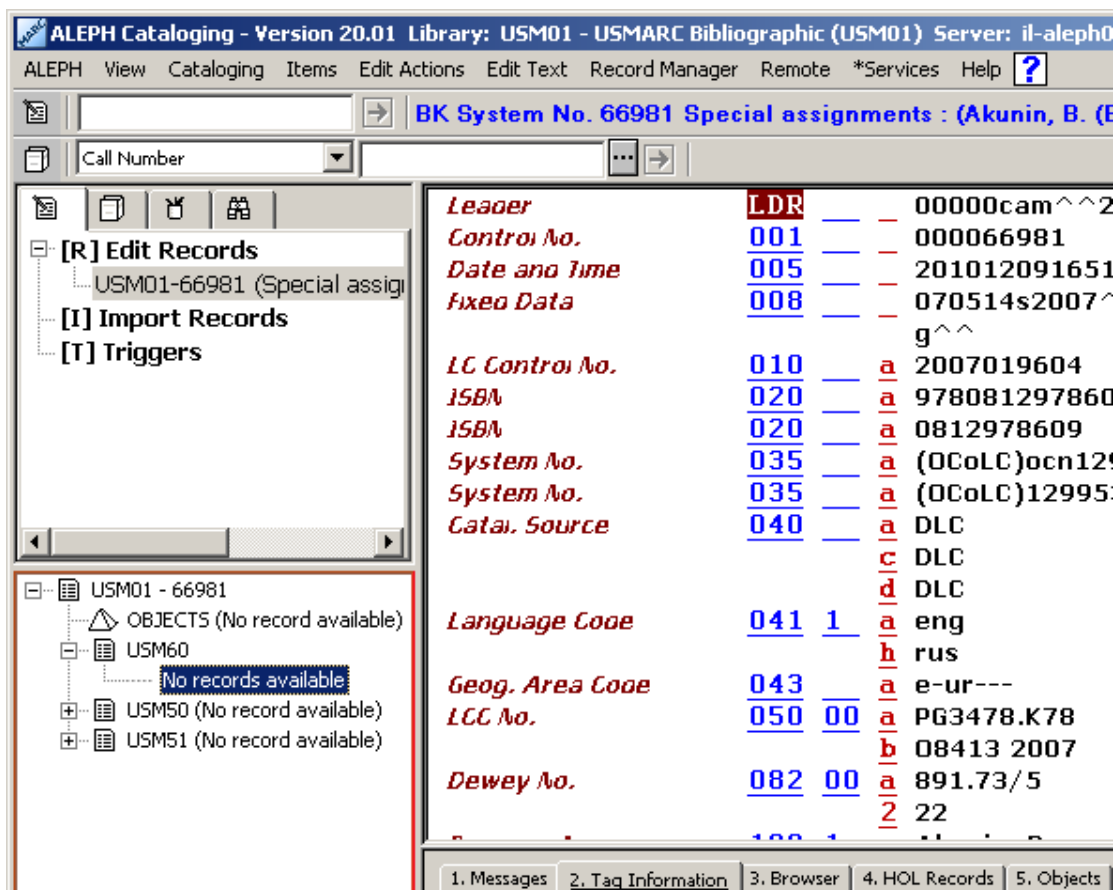
There are two different ways to create holdings records for the current bibliographic record:

- Through the Record Manager
- Through the HOL Records tab of the lower pane

3.6.1 Create Holdings Records Through the Record Manager

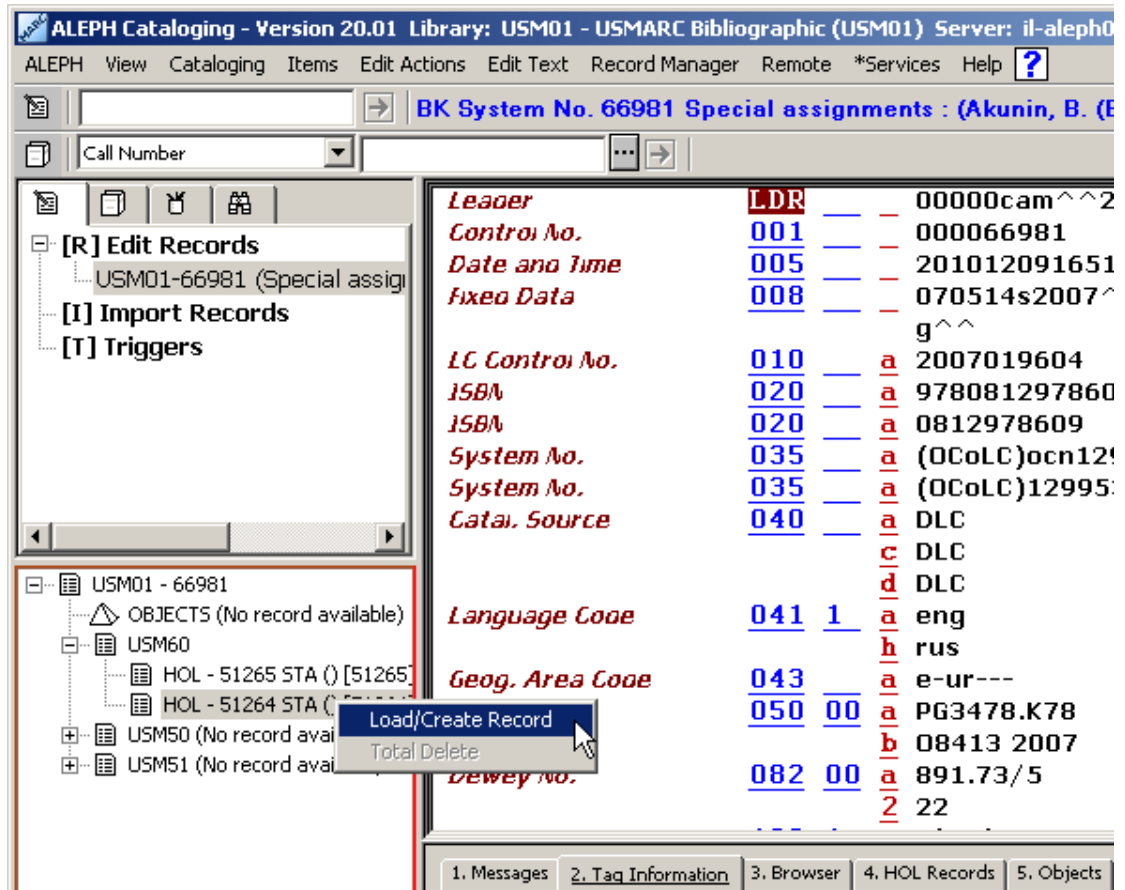
Holdings records can be created through the Record Manager of the Cataloging tab (lower section of the left pane).

If there are no holdings records linked to the bibliographic record, the message "No record available" is displayed under the holdings library node.



To create holdings records follow these steps:

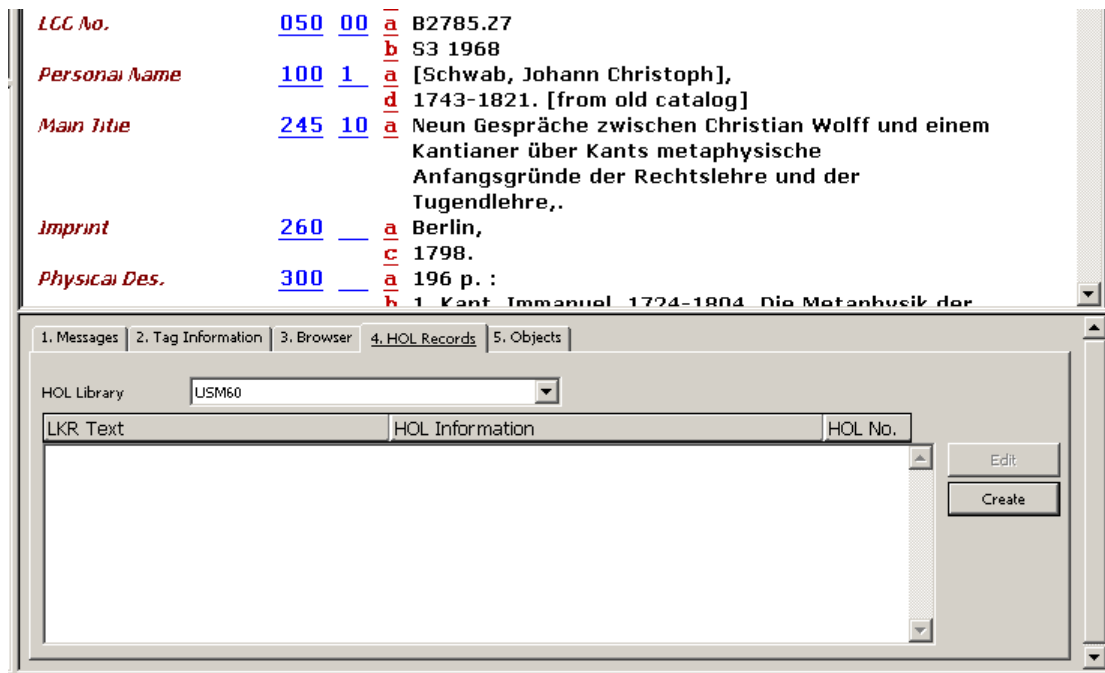
1. Highlight the holdings library node.
2. Choose the Load/Create Record option from the Record Manager menu or select the same option when right-clicking on the administrative library node:



This option automatically creates a holdings record and displays it for editing. This action can be repeated to create more than one holdings record.

3.6.2 Create Holdings Records Through the HOL Records Tab

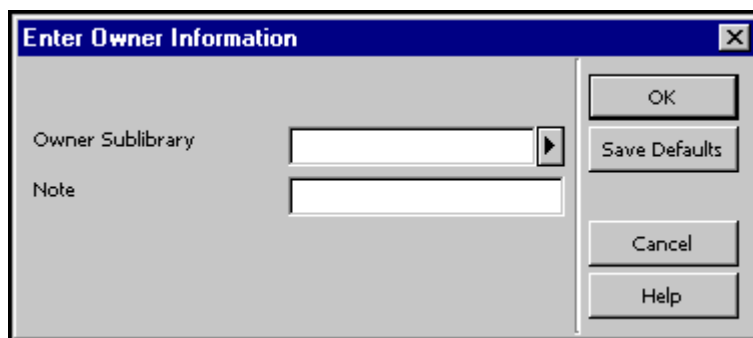
Holdings records can also be created from the Holdings Record tab of the lower pane:



The HOL Records tab lists the holdings records linked to the record displayed in the Catalog Editor. This tab also enables you to access a selected record for editing and to create new holdings records.

To create a new holdings record, click **Create**. The new record is automatically created. To edit the new record, click **Edit**.

Note that if the Activate flag of the [HolOwnTextDefaults] section of the catalog.ini file is set to Y, when holdings records are created through either method the Enter Owner Information window is displayed:



This window enables you to define the owner of the holdings record, that is, the sublibrary to which the record belongs. In addition, you can add a note. When you have finished filling in the form, click **OK**. The information is automatically stored in the OWN field of the holdings record in the following format:

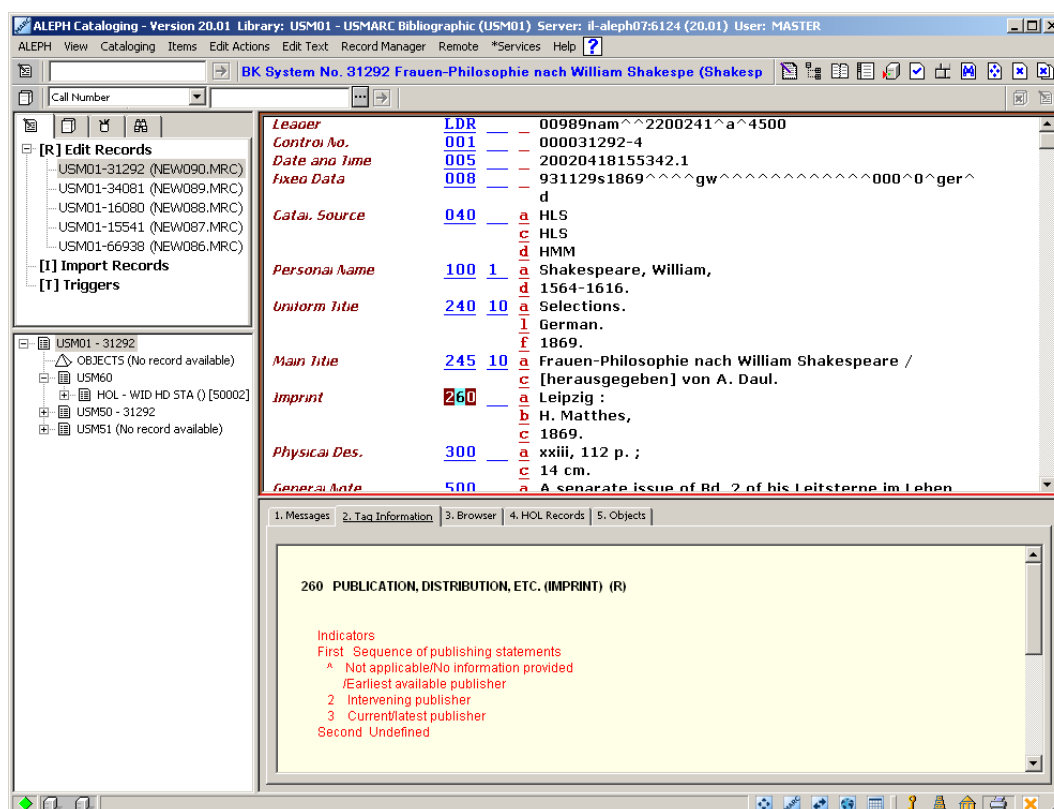
```
OWN $$a[sublibrary code]
    $$n[note]
```

You can use the Save Default button to save the information about the owner and apply it to each new holdings record that is created. To save the owner information, click **Save Defaults** before clicking **OK**.

Refer to "OWN" Field on page 99 for more details on the OWN field.

4 Editing Records

Cataloging records are edited through the Edit Records subfunction. You access this option by selecting the Edit Records node from the Cataloging tab. The screen below shows a sample catalog record in the Edit Records environment. It is provided for you to refer to while reading the sections of this chapter.



Note that the Catalog Editor (upper pane) must be in focus for editing purposes.

When records are opened for editing through the Edit Records option of the Cataloging tab, they are listed under the Edit Record node of the Navigation Tree.

Records saved on the server are listed in the following format:

Library code - system number (Local number).

For example:

USM01-3563 (NEW870.MRC)

Local records are listed in the following format:

Local number (Local).

For example:

NEW871.MRC (Local)

After performing changes to either type of records, their representation is changed by a preceding asterisk, for example:

* USM01-3563 (NEW870.MRC)
* NEW871.MRC (Local)

4.1 Moving Around a Record

Up/Down arrows - moves up/down one line

Left/Right arrows - moves left/right one space

Tab - moves from field to field

PageUp - moves up one page

PageDn - moves down one page

Home - moves to the beginning of the line where the cursor is positioned

End - moves to the end of the line where the cursor is positioned

Ctrl+Home - moves to the beginning of the record

Ctrl+End - moves to the end of the record

4.2 Editing Portions of a Field

Editing the tag

The tag works in overwrite mode only. To change the tag, simply type over it. To delete a character, use the spacebar (not the delete key).

Editing the indicator

The indicator works in overwrite mode only. To change the indicator, simply type over it. To delete a character, use the spacebar (not the delete key).

Editing the subfield code

The subfield code works in overwrite mode only. To change the code, simply type over it. It is not possible to delete a character with either the spacebar or the delete key. To delete a subfield, use the shortcut key Ctrl+F7 or select Delete Subfield from the Delete submenu of the Edit Text menu. This will delete both the subfield code and its contents.

Editing the contents

The contents area is set to work in insert mode. To work in overwrite mode, press the Insert key. Note, however, that when using the spacebar while working in insert mode to enter a blank space, you may enter only one blank space at a time; you are prevented from inserting a number of blank spaces in a row.

To delete a single character while working in insert mode, use the Delete key (not the spacebar). To delete a group of characters, select the text, then use the Delete key or the spacebar.

You may select text to be deleted or copied by pressing the left mouse button and dragging the mouse cursor over the desired text.

To cut text, use the shortcut key Ctrl+X or select Cut from the Cut submenu of the Edit text menu. To copy text, use the shortcut key Ctrl+C or select Copy from the Copy submenu of the Edit text menu. To paste text, use the shortcut key Ctrl+V or select Paste from the Paste submenu of the Edit text menu.

Note that you cannot enter consecutive dollar signs (\$\$) as the system uses two consecutive dollar signs to define subfields. Consecutive dollar signs should be entered with spaces in between. However, two consecutive dollar signs (\$\$) can be used to enter new subfields without opening a new subfield code line by using the New Subfield option from the Edit text menu.

Additionally, note that fields are limited in ALEPH to 2000 bytes. Records are limited to 5000 subfields and to 45000 bytes.

For this reason, when cataloging online, the system does not allow the user to enter more than 2000 bytes per field. When long fields are imported into ALEPH, if the text for a single field is more than 2000 bytes, the system splits the text into separate (repeated) fields. Split fields are prefaced by \$\$9. For export purposes, you can use this method to catalog long fields.

4.3 Available Editing Functions

4.3.1 Table of Available Editing Functions

The table below contains the full list of available editing functions. More complicated functions, for example Fix Record and Derive New Record, are described in more detail immediately after the table.

Function	Shortcut Key	Description
Undo	Ctrl+Z	This function enables you to reverse your last action. Each click reverses one more action.
Redo	Ctrl+Y	This function enables you to restore the last action that was undone by using the Undo function.
Open Form	Ctrl+F	Opens a form that enables you to edit the contents of a field. If no form is available, the system will open the subfield(s) for you to edit directly in the catalog record.
Expand from Template	Ctrl+E	Adds fields and subfields from a template to your current record.
Help on Field	None	This function enables you to select automatically the Tag Information tab from the lower pane. The Tag Information tab provides a guide to the use of valid indicators, subfield codes and values for the field selected in the upper pane. To receive help on a field, place your

Function	Shortcut Key	Description
		cursor on the field of interest. The tab will automatically display the relevant tag information.
Locate Similar Record	None	Finds records in your local database or in another database that are similar to the one currently being edited.
Record's Triggers	None	A trigger is a reminder to perform a task related to the record. This function enables you to view, add and delete triggers from the Cataloging module that relate to the record currently being edited. These triggers may include messages produced by the system regarding errors found when the Check Record function was used.
Change Record's Format	None	This function enables you to change the record's format. Changing the record's format will also change the forms (for entering field data) and the checks that are performed on the record.
Enter Unicode Values	F11	This function enables you to enter unicode values for characters not present in your keyboard. The unicode values can be entered after selecting the Enter Unicode Values option from the Edit text menu or using the F11 shortcut key, and to finish, you must select the Enter Unicode Values option again or use the F11 shortcut key. The status bar displays a message to indicate that the user is currently working with the Enter Unicode Values option.
Select HOL Record	None	The Select HOL Record option enables you to select automatically the HOL Records tab from the lower pane. This tab lists the holdings records linked to the record displayed in the Catalog Editor. This tab also enables you to access a selected record for editing and to create new holdings records.
New Field (choose from list)	F5	Enables you to add a new field by choosing from a list of fields.
New Field (user-defined)	F6	Enables you to add a field whose tag, indicator and subfields you may define by yourself.
Change Direction	None	This option enables you to change the text direction of the current field. To configure this functionality, refer to the REQ_LNG.DAT file which is located under the .\alephcom\tab<lng> directory. Note that when working in Combined Character mode, this option is enabled only when right-to-left languages support is installed on your computer.

Function	Shortcut Key	Description
New Subfield	F7	Opens a new subfield below the current subfield.
Search Field Headings of Current Library	F3	This option enables you to add contents to a field by choosing from a list of headings in your current library.
Search Field Headings of Other Library	Ctrl + F3	This option enables you to add contents to a field by choosing from a list of headings in a library other than the home library to which you are currently connected.
Search Subfield Headings of Current Library	F4	This option enables you to add contents to a subfield by choosing from a list of headings in your current library.
Search Subfield Headings of Other Library	Ctrl + F4	This option enables you to add contents to a subfield by choosing from a list of headings in a library other than the home library to which you are currently connected.
Search Subfield Options	Ctrl + F8	This option enables you to choose subfield text from a list of options defined by the library.
Browse URL	None	This option enables you to check the URL cataloged in subfield \$u of the current field.
Cut	Ctrl+X	This function enables you to move the selected text to the Windows clipboard. This can be used for deleting text. Since the text is moved into the clipboard, it is also possible to paste the text somewhere else in the record or to another record.
Cut Subfield(s)	None	This function enables you to move the selected subfield(s) to the Windows clipboard. This option can be used for deleting the subfield(s). Since the subfield is moved into the clipboard, it is also possible to use this option together with the Paste subfield option in order to move the subfield(s) from one place to another (cut-and-paste).
Cut Field(s)	None	This function enables you to move the selected field(s) to the Windows clipboard. This option can be used for deleting the field(s). Since the field is moved into the clipboard, it is also possible to use this option together with the Paste field option in order to move the field(s) from one place to another (cut-and-paste).

Function	Shortcut Key	Description
Copy	Ctrl+C	Copies highlighted text into the Windows clipboard.
Copy Subfields	Ctrl+S	Copies the selected subfield(s) into the Windows clipboard. Both the subfield code(s) and contents will be copied.
Copy Field(s)	Ctrl+T	Copies the selected field(s) into the Windows clipboard. The tag(s), indicators, subfield codes and the contents will all be copied.
Copy Record	Ctrl+D	Copies the entire contents of the current record into the Windows clipboard. Used with Paste Record, this option can be used to merge records.
Paste	Ctrl+V	Inserts the copied text.
Paste Subfield(s)	Alt+S	Inserts the copied subfield(s) below the current subfield. Both the subfield code(s) and the contents will be pasted.
Paste Field(s)	Alt+T	Inserts the copied field(s) below the current field. The field's tag(s), indicator(s), letters of the subfields and the contents will all be pasted.
Paste Record	Alt+D	Pastes the entire contents of the copied record into the current record. This option can be used to merge records. Note that duplicated fields will appear one after the other if a sorting procedure is defined by your system librarian for the pasting routine.
Delete Subfield	Ctrl+F7	<p>To delete a subfield, place the cursor anywhere in the desired subfield (either in the subfield or in the contents of the subfield). Then use the shortcut key Ctrl+F7 or select Delete Subfield(s) from the Delete submenu from the Edit text menu.</p> <p>To delete a group of subfields from the field, highlight the desired subfields to select them. Then use the shortcut key Ctrl+F7 or select Delete Subfield(s) from the Delete submenu from the Edit text menu.</p> <p>Note that if only an "a" subfield is remaining, you can delete its contents, but not the letter "a". If any other subfield is the only remaining subfield - for example, only a "c" subfield remains - you can delete both the subfield code and its contents. In their place, an "a" subfield with empty contents is displayed.</p>
Delete Field	Ctrl+F5	<p>Deletes the current field.</p> <p>To delete a field, place the cursor anywhere in the desired</p>

Function	Shortcut Key	Description
		<p>field (on the tag, the indicator, the code of any subfield, or the contents of any subfield).</p> <p>To delete a group of fields, highlight the desired fields to select them. Then use the shortcut key Ctrl+F5 or select Delete Field(s) from the Delete submenu of the Edit text menu.</p>
Delete Record from Server	Ctrl+R	<p>Deletes the current record from the server. Note that the record will not actually be deleted, but all fields except the LDR field will be removed. In addition, all links from the record to the OPAC indexes will also be removed. It is possible to set up the system so that when a cataloger tries to delete a record, the system will check to see if there are any links from the record to another record or if there are any associated items, subscriptions, orders, loans, photocopy requests or hold requests.</p>
Show Hidden Characters	Alt+F2	<p>Displays a bubble above the inserted text in the record, showing the text with hidden characters (including directionality characters) but not combined characters. Note that this functionality is available only when combined character functionality is supported.</p>
Find	None	<p>This function enables you to find text in the current record. You can find text with the same capitalization style as the text you type and whole words instead of parts of words.</p>
Replace	None	<p>This function enables you to find and replace in the current record a character string with another string wherever the first string appears in the record. This option has two replace modes. In the first mode, all replacements are done automatically (Replace All). In the second mode, each replacement requires you to press the Replace button. You can find and replace whole words instead of parts of words and find and replace text with the same capitalization style as the text you type.</p>
Check Field	Ctrl+W	<p>For the current field, this function:</p> <ul style="list-style-type: none"> • Checks that the indicators and/or subfield codes are valid for the tag. • Checks that mandatory subfields are present. • Checks that non-repeatable subfields are not repeated.

Function	Shortcut Key	Description										
		<ul style="list-style-type: none"> • Checks dependencies between the selected field and other fields in the record. • Checks whether or not a new record will be opened in the headings list. • Checks whether or not a duplicate record will be opened in the Direct (Z11) Index. 										
Check Record	Ctrl+U	<p>For the current record, this function:</p> <ul style="list-style-type: none"> • Checks that the indicators and/or subfield codes are valid for the tag. • Checks that the required fields and subfields are present. • Checks that non-repeatable fields and subfields are not repeated. • Checks that all dependent fields are present. • Checks whether or not a new entry will be opened in the headings list. • Checks whether or not a duplicate record will be opened in the Direct (Z11) Index. 										
Expand from item barcode		<p>Right-click the LKR field or select Expand from item barcode from the Edit Actions menu to activate this function. You may set your system setup to replace the title 245\$\$a with the item's description text. This occurs only if your system is set with tab100: EXPAND-ITEM-UPD-TIT=Y (./xxx01/tab/tab100). The title replacement is the default behavior. If the library does not want to change 245\$\$a, set tab100 set with EXPAND-ITEM-UPD-TIT=N. The subfields of the LKR field in the BIB record are filled with the item information from the item record, as follows:</p> <table border="1" data-bbox="603 1711 1351 2031"> <thead> <tr> <th data-bbox="603 1711 976 1771">LKR Subfield</th> <th data-bbox="979 1711 1351 1771">Item Record</th> </tr> </thead> <tbody> <tr> <td data-bbox="603 1776 976 1836">LKR\$\$y</td> <td data-bbox="979 1776 1351 1836">item chronology level i</td> </tr> <tr> <td data-bbox="603 1841 976 1901">LKR\$\$j</td> <td data-bbox="979 1841 1351 1901">item chronology level j</td> </tr> <tr> <td data-bbox="603 1906 976 1966">LKR\$\$w</td> <td data-bbox="979 1906 1351 1966">item chronology level k</td> </tr> <tr> <td data-bbox="603 1971 976 2031">LKR\$\$o</td> <td data-bbox="979 1971 1351 2031">item chronology level l</td> </tr> </tbody> </table>	LKR Subfield	Item Record	LKR\$\$y	item chronology level i	LKR\$\$j	item chronology level j	LKR\$\$w	item chronology level k	LKR\$\$o	item chronology level l
LKR Subfield	Item Record											
LKR\$\$y	item chronology level i											
LKR\$\$j	item chronology level j											
LKR\$\$w	item chronology level k											
LKR\$\$o	item chronology level l											

Function	Shortcut Key	Description																		
		<table border="1" data-bbox="603 297 1351 882"> <tr> <td>LKR\$\$q</td> <td>item chronology level m</td> </tr> <tr> <td>LKR\$\$v</td> <td>item enumeration level a</td> </tr> <tr> <td>LKR\$\$i</td> <td>item enumeration level b</td> </tr> <tr> <td>LKR\$\$p</td> <td>item enumeration level c</td> </tr> <tr> <td>LKR\$\$d</td> <td>item enumeration level d</td> </tr> <tr> <td>LKR\$\$e</td> <td>item enumeration level e</td> </tr> <tr> <td>LKR\$\$f</td> <td>item enumeration level f</td> </tr> <tr> <td>LKR\$\$g</td> <td>item enumeration level g</td> </tr> <tr> <td>LKR\$\$h</td> <td>item enumeration level h</td> </tr> </table> <p data-bbox="603 898 1351 969">In addition, subfield 245\$a is filled with the item's description.</p> <p data-bbox="603 999 1351 1070">Expand from Item Barcode does not affect other LKR subfields.</p> <p data-bbox="603 1099 1351 1317">Note that the LKR filters are applied for all LKR subfields only if Z103X (the extended linkage mechanism between document) is applied. If Z103X is not applied, the following LKR subfields are not taken into account when linking the BIB record to specific items: d, e, f, g, h, w, o, and q.</p> <p data-bbox="603 1346 1351 1525">Usage example: You want to link a BIB record that represents the issue title to items that are attached to a different BIB record that represents the journal title. The link between the two BIB records is set as in the following example.</p> <div data-bbox="603 1554 1155 1899" style="border: 1px solid black; padding: 5px;"> <pre> 245 0 a Journal of Biology. Vol. 18 No. 1. LKR - a ANA b 000056972 l USM01 n Journal of Biology. m Journal of Biology. y 2011 v 18 i 1 j Jan </pre> </div> <p data-bbox="603 1928 1351 2000">This example shows the links between the issue title Journal of Biology. Vol.18 No.1 (Jan 2011) part</p>	LKR\$\$q	item chronology level m	LKR\$\$v	item enumeration level a	LKR\$\$i	item enumeration level b	LKR\$\$p	item enumeration level c	LKR\$\$d	item enumeration level d	LKR\$\$e	item enumeration level e	LKR\$\$f	item enumeration level f	LKR\$\$g	item enumeration level g	LKR\$\$h	item enumeration level h
LKR\$\$q	item chronology level m																			
LKR\$\$v	item enumeration level a																			
LKR\$\$i	item enumeration level b																			
LKR\$\$p	item enumeration level c																			
LKR\$\$d	item enumeration level d																			
LKR\$\$e	item enumeration level e																			
LKR\$\$f	item enumeration level f																			
LKR\$\$g	item enumeration level g																			
LKR\$\$h	item enumeration level h																			

Function	Shortcut Key	Description
		a to the item record that is related to the journal title <i>Journal of Biology</i> . LKR subfields y, v, i, and j are created by the Expand from Item Barcode option.
Sort Record	Ctrl+M	Sorts the fields of the current record according to the order defined in the ALEPH table of codes. However, for MARC 21 libraries, within the 5xx, 6xx, 7xx, 8xx, and UNIMARC 6xx groups of fields, the order of the fields remains as they were entered by the cataloger. Fields that do not have any content are deleted. In an authority library, all fields are sorted according to the order defined in the ALEPH table of codes (tab01.lng).
Fix Record	None	Automatically fixes the current record according to standard library-defined procedures which make changes such as: <ul style="list-style-type: none"> • Inserting punctuation into the catalog record. • Changing tags, for example, for translation from MARC 21 codes to UNIMARC codes.
Derive New Record	None	Enables you to use fix routines in order to create a new record rather than fix the current one. For example, you can create an authority record based on the current bibliographic record. Routines that have been set to fix the current record appear under the Fix record option. Routines that have been set to create a new record appear under the Derive new record option.
View Record's Catalogers	None	This option enables you to view the list of catalogers who have edited the selected record. The Cataloger Level of each person is given, along with the date and hour that each cataloger edited the record.
View Local Owner	None	This option supports Local Owner functionality (Central-Local Cataloging). In standard applications, this option is not applicable.
Enter Text Mode	Ctrl+F12	This option functions as a toggle switch. When it is activated (either via the menu or via a shortcut key - Ctrl+F12), the system is ready to receive input. The input is displayed on the status bar as it is typed in. The input is in the form of command-like language. Refer to the Enter Text Mode section below for more details.

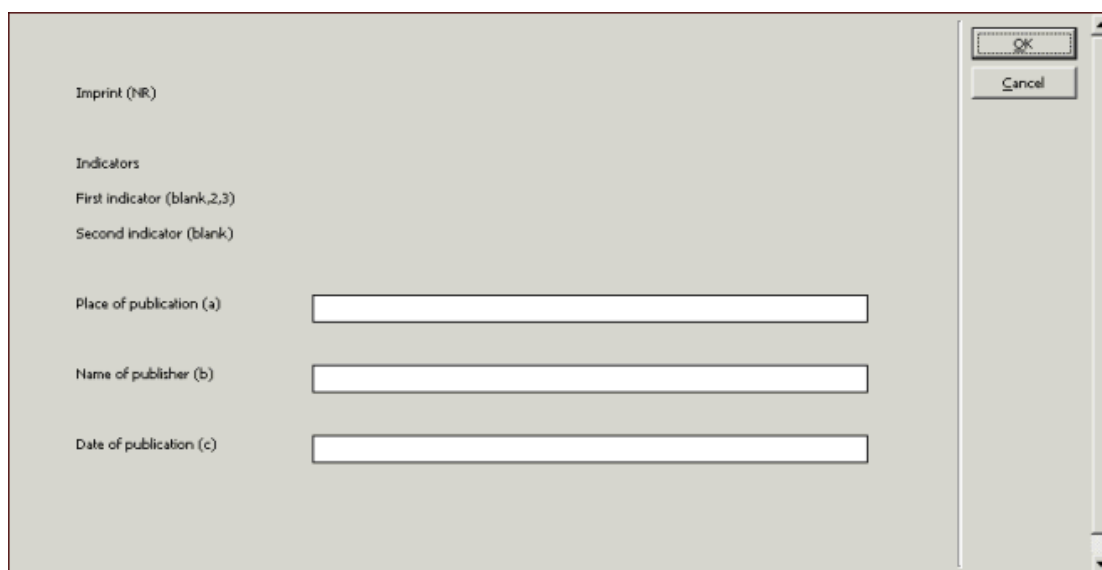
Function	Shortcut Key	Description
Preview Publication Schedule	None	This option enables you to preview the publication schedule for serials records based on the fields 853/854/855 and 853X/854X/855X of the holdings or administrative record. For more details refer to the Serials chapter.
Reverse Record Orientation	Ctrl+Shift	If the CtrlShiftReverseScreen flag in the ALEPHCOM/TAB/ALEPHCOM.INI file is set to Y, then while you are working with the catalog record, you can press Ctrl+Shift to reverse the orientation of the record (left-to-right / right-to-left). This is especially useful when entering script that is written from right-to-left.
Display Unicode Value	None	If the ShowUnicodeValue in the Catalog/Tab/Catalog.ini file is set to Y, when placing the mouse pointer over a character in the catalog record - after about two seconds - a ToolTip appears above the character displaying the character's Unicode value identified by the hexadecimal representation of its Unicode number prefixed with a U, for example, U+0041 for "A".
View Records History	None	This option enables you to view the history of the record. The history is saved only for fields that have been defined by the system administrator.

Opening Forms

A form enables you to edit the contents of a field. If no form is available, the system will open the subfield(s) for you to edit directly in the catalog record. To open a form, follow these steps:

1. Place the cursor on the field you want to edit. From the Edit actions menu, select the Open Form option or use the shortcut key Ctrl+F.

The form for editing the field will be displayed. The form lists the subfields and provides spaces for you to type in the contents. The form below is an example of the form for the MARC 21 field for the imprint (260):

A screenshot of a software form for editing the MARC 21 field for the imprint (260). The form is titled "Imprint (NR)" and includes a section for "Indicators" with two fields: "First indicator (blank,2,3)" and "Second indicator (blank)". Below the indicators are three input fields: "Place of publication (a)", "Name of publisher (b)", and "Date of publication (c)". Each of these three fields is currently empty. On the right side of the form, there are two buttons: "OK" and "Cancel".

2. Edit the contents of the field. You may move from space to space by using the tab key. Note that the spaces of the form are of fixed length; you may not enter text that is longer than the space provided on the form. Click OK.

The contents of the field will be automatically inserted into the cataloging record.

For fixed-length fields, each line of the form is not a separate subfield, but rather part of one field. A single string of text is created from the data you enter, with fixed locations for each data element.

The form below is an example of the form for the 008 MARC 21 field:

008 Fixed length data elements (BOOKS)

Date entered on file (00-05)	<input type="text"/>	Type of date (06)	<input type="text" value="s"/>
Date 1 (07-10)	<input type="text" value="2003"/>	Date 2 (11-14)	<input type="text"/>
Publication Place (15-17)	<input type="text" value="cau"/>	Illustration codes (18-21)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Target audience (22)	<input type="text"/>	Form of item (23)	<input type="text" value="r"/>
Nature of contents (24-27)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Govt. publication (28)	<input type="text"/>
Conference publ. (29)	<input type="text" value="0"/>	Festschrift (30)	<input type="text" value="0"/>
Index (31)	<input type="text" value="0"/>	Unspecified (32)	<input type="text"/>
Literary form (33)	<input type="text" value="0"/>	Biography (34)	<input type="text"/>
Language (35-37)	<input type="text" value="eng"/>	Modified record (38)	<input type="text"/>
Cataloging source (39)	<input type="text" value="d"/>		

OK
Cancel

The Tag Information tab of the lower pane provides a guide for filling in the form, advising you on the use of valid indicators, subfield codes and values for the current field:

008 Fixed length data elements (BOOKS)

Date entered on file (00-05)	<input type="text"/>	Type of date (06)	<input type="text" value="s"/>
Date 1 (07-10)	<input type="text" value="2010"/>	Date 2 (11-14)	<input type="text"/>
Publication Place (15-17)	<input type="text" value="XX"/> ...	Illustration codes (18-21)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Target audience (22)	<input type="text"/>	Form of item (23)	<input type="text" value="r"/>
Nature of contents (24-27)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Govt. publication (28)	<input type="text"/>
Conference publ. (29)	<input type="text" value="0"/>	Festschrift (30)	<input type="text" value="0"/>
Index (31)	<input type="text" value="0"/>	Unspecified (32)	<input type="text"/>
Literary form (33)	<input type="text" value="0"/>	Biography (34)	<input type="text"/>
Language (35-37)	<input type="text" value="eng"/> ...	Modified record (38)	<input type="text"/>
Cataloging source (39)	<input type="text" value="d"/>		

OK
Cancel

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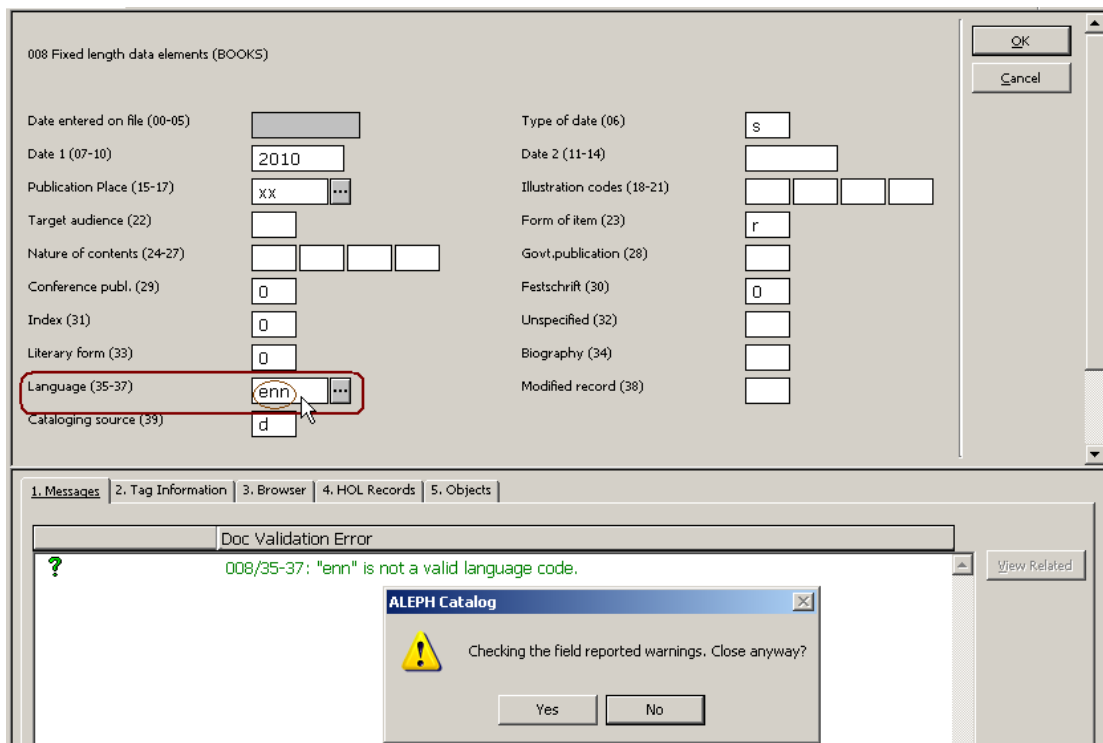
008 BOOKS

00-05 Date entered on file

06 Type of date/publication status

- b No dates given; B.C. date involved
- c Continuing resource currently published
- d Continuing resource ceased publication
- e Detailed date
- i Inclusive dates of collection

If the form has been set to be verified for correctness, after you click OK, the system checks for potential errors. If errors are found, the error messages are shown in the Messages tab of the lower pane. The system displays warnings and asks you if you are sure that you want to close the form.

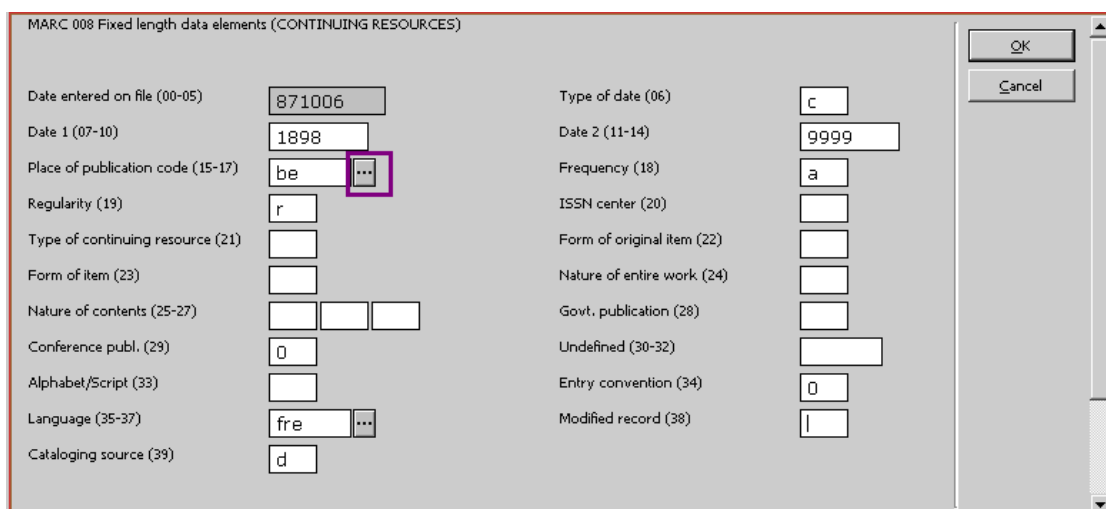


If you click **No**, you can go back to correct the form. Click **OK** when you have finished correcting the form.

List of Values in Fixed-Length Fields Forms

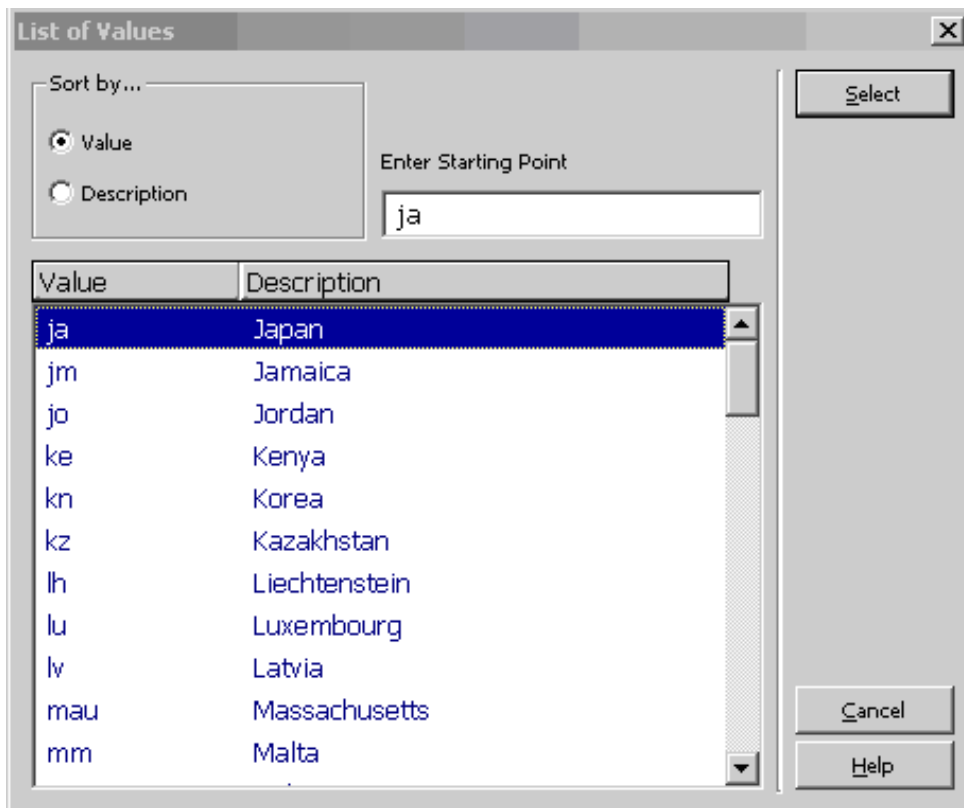
Depending on your system set-up, the cataloging forms of fixed-length fields can contain an option to display a list of valid values for certain positions. Each library decides for which forms and for which positions the Valid Value dialog box should be available.

Below is a sample of the MARC 008 Fixed Length Form with an expand button next to the Place of Publication Code field (008 positions 15-17):



Clicking the expand button displays the List of Valid Values dialog box, which contains a list of pre-defined values and descriptions for certain tags and positions.

Below is a sample of List of Values for tag 008 positions 15-17: Place of Publication:



The content of the List of Values is determined by the library's setup. The list can be sorted by value or description.

Users can jump to a particular point in the list (value or description) by typing in text in the space provided.

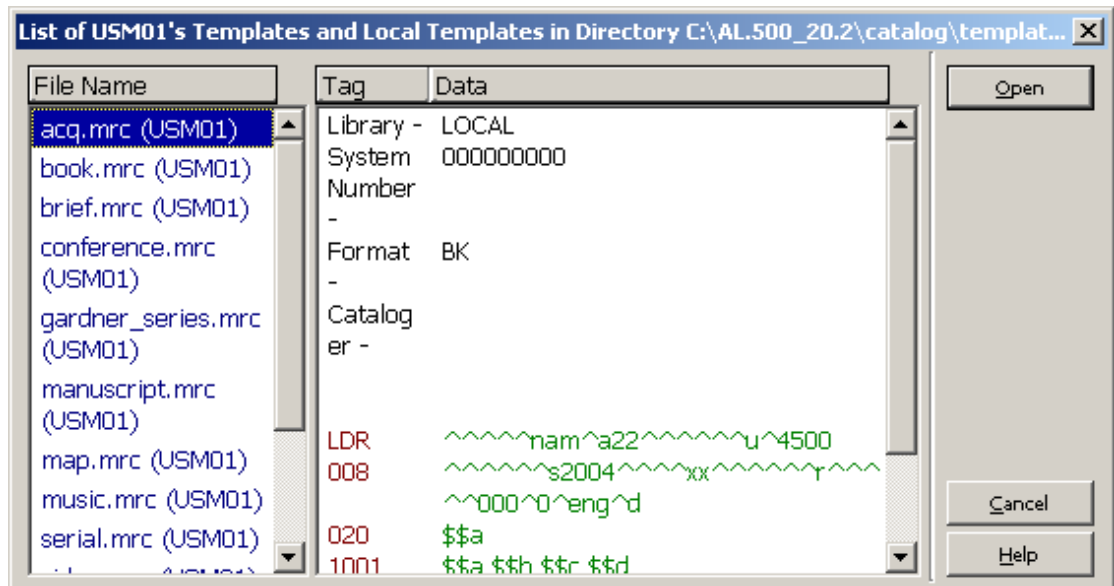
To select a value from the list, highlight the entry and click **Select**.

The selected value is populated in the relevant position of the fixed-length field form.

Expand from Template

The Expand from Template function adds fields and subfields from a template to your current record. To do this, follow these steps:

1. From the Edit Actions menu, select the Expand from Template option or use the shortcut key Ctrl+E. A pop-up dialog box will be displayed, from which you can select the template of your choice.



2. Select an appropriate template from the pop-up dialog box and click the Open button.

The current record will be enhanced with the fields and subfields in the template.

Note that the subfields are not sorted in alphanumeric order. For example, if a subfield is repeated, the subfield is placed at the end of the field. In other words, \$a\$a\$b\$c are sorted as follows: \$a\$b\$c\$a and not \$a\$a\$b\$c.

Help on Field

When you are positioned on a field or subfield, the Tag Information tab on the lower pane provides a guide to using the field. This tab gives a description of the currently highlighted field, along with information regarding the indicators, valid subfields, and a description of the subfields. It also specifies which fields and subfields are repeatable. An example for MARC 21 tag 260 is shown below.

<i>LCC No.</i>	<u>050</u>	<u>00</u>	<u>a</u>	HG555
			<u>b</u>	.W44
<i>Dewey No.</i>	<u>082</u>	<u>00</u>	<u>a</u>	332.4/22
<i>Personal Name</i>	<u>100</u>	<u>1</u>	<u>a</u>	Weinstein, Allen.
<i>Main Title</i>	<u>245</u>	<u>10</u>	<u>a</u>	Prelude to Populism :
			<u>b</u>	origins of the silver issue, 1867-1878.
<i>Imprint</i>	<u>260</u>		<u>a</u>	New Haven, :
			<u>b</u>	Yale University Press,
			<u>c</u>	1970.
<i>Physical Des.</i>	<u>300</u>		<u>a</u>	x, 433 p. ;
			<u>c</u>	22 cm.
<i>Series/Adj. Tit.</i>	<u>440</u>	<u>0</u>	<u>a</u>	Yale historical publications. Miscellany,
			<u>aa</u>	

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260 PUBLICATION, DISTRIBUTION, ETC. (IMPRINT) (R)

Indicators
 First Sequence of publishing statements
 ^ Not applicable/No information provided
 /Earliest available publisher
 2 Intervening publisher
 3 Current/latest publisher
 Second Undefined

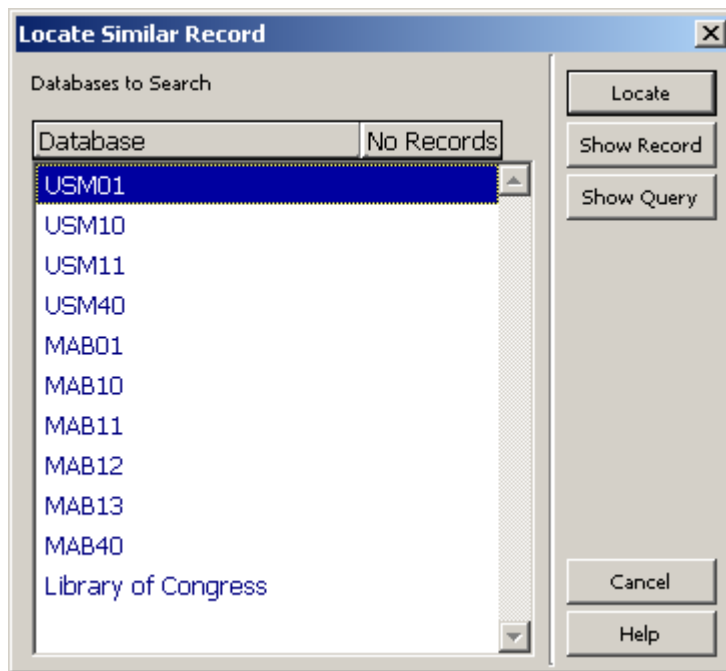
Subfield Codes
 \$a Place of publication, distribution, etc. (R)
 \$b Name of publisher, distributor, etc. (R)
 \$c Date of publication, distribution, etc. (R)
 \$d Plates of publisher's number for music (Pre-AACR 2)[LOCAL] (R)
 \$e Place of manufacture (R)
 \$f Manufacturer (R)
 \$g Date of manufacture (R)

Note that the Help on Field option from the Edit Actions menu enables you to select automatically the Tag Information tab when other tabs are in focus.

Locate Similar Record

The Locate Similar Record function finds records in another database or in the local database similar to the one you are currently editing. To locate similar records, follow these steps:

1. On the Edit Actions menu, select the Locate Similar Record option.
The Locate Similar Record window will be displayed.



2. Highlight the desired database(s) and click **Locate**.

The right column of the window, No. Records, displays the number of hits for each database. To see the records, select one of the databases and click the Show Record button.

If only one similar record was found, a window with the record in Full format will be displayed. You can either view or merge the record with the one you are currently editing by clicking **Select**.

The MergeRecord variable in the catalog.ini file of the catalog/tab directory specifies whether or not the located record should be automatically merged with the current record.

If the variable is set to **Y**, the selected similar record is merged automatically with the current record without a message being displayed. If the variable is set to **N**, the cataloging draft of the selected similar record will be displayed.

If the variable is set to **Q**, a message is displayed asking whether the records should be merged. Clicking the Yes button will merge the records; clicking the No button will display the catalog card of the selected record.

If more than one record was found, a window with the list of the records in Brief format will be displayed. Highlighting a record and clicking **Full View** will display the selected record in Full format. From both windows, you can either View or Merge the record with the one you are currently editing by clicking **Select**.

More than one record can be selected at the same time by pressing the Ctrl key while pointing at the pertinent records and clicking the left mouse button. In this case, even if the MergeRecord variable is set to Y or Q, when clicking **Select** the cataloging cards of the selected records are displayed without merging.

To see the Find command performed by the Locate function, click the Show Request button. The system will display a message containing the search request (for example, wau= Auster, Paul and wti= chance and music).

Record's Triggers

A trigger is a reminder to perform a task related to the record. To view, add or delete triggers for the current record, select the Record's trigger option from the Edit Actions menu. The List of Triggers for Record window will be displayed.

Date	Department	Text
12/12/2010	CAT	Field 1001 : "\$\$aWeinstein, Allen." is a new heading in the AUT list.
12/12/2010	CAT	Field 1001 : "\$\$aWeinstein, Allen." is a new heading, and is not in authority database.
12/12/2010	CAT	Field 440 0 : "\$\$aYale historical publications. Miscell" is a new heading in the TIT list.
12/12/2010	CAT	Field 440 0 : "\$\$aYale historical publications. Miscell" is a new heading in the SRS list.
12/12/2010	CAT	Field 440 0 : "\$\$aYale historical publications. Miscell" is a new heading, and is not in authority database.

Trigger Information for Record

Open Date: 12/12/2010

Trigger Date: 12/12/2010

Department: CAT

Trigger Text: Field 1001 : "\$\$aWeinstein, Allen." is a

Adding Triggers

To add a trigger to the list, follow these steps:

1. Click **New**.
2. The Open Date field will be automatically filled in by the system. It contains the date on which the trigger is defined.
3. Fill in the Trigger Date field. This is the date on which you should perform a particular task related to the record. By default, it is set to the current date.
4. If needed, fill in the optional Department field.
5. Fill in the Trigger Text field. Enter information reminding you of the task that must be performed.
6. Click **Add**.

Modifying Triggers

To modify a trigger from the list, follow these steps:

1. Highlight the appropriate trigger from the list (in the upper pane).
2. Change the trigger's date, department or text (in the lower pane).
3. Click **Update**. The trigger is automatically updated.

Deleting Triggers

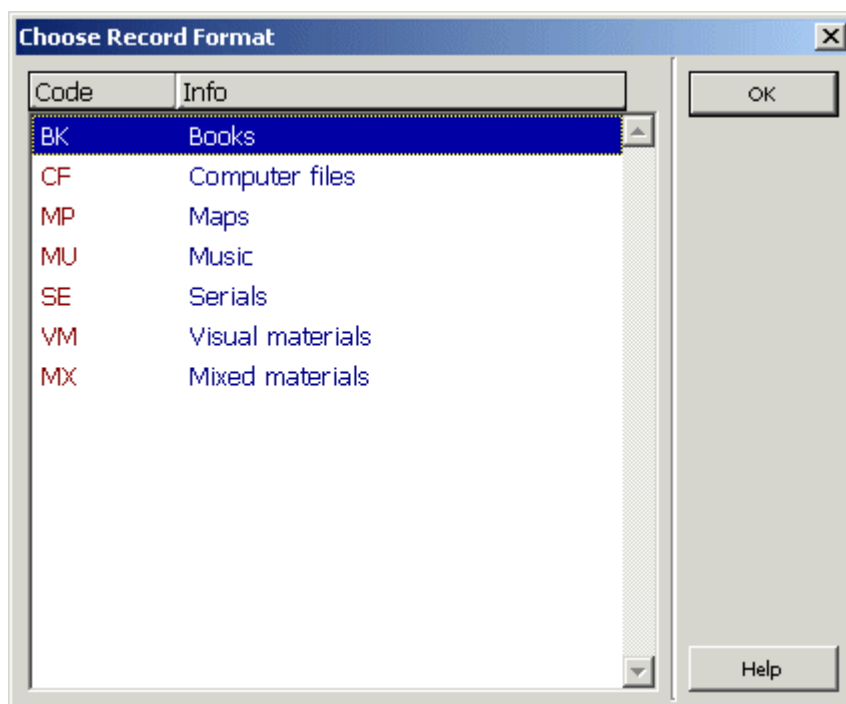
To delete a trigger from the list, follow these steps:

1. Highlight the appropriate trigger from the list.
2. Click **Delete**. The trigger will be removed from the list.

Change the Record's Format

This function changes the record's current format. The Change Record's Format option will also change the forms (for editing fields) and the checks that are performed on the record. To do this, follow these steps:

1. From the Edit Actions menu, select the Change Record's Format option. The Choose Record Format window will be displayed.

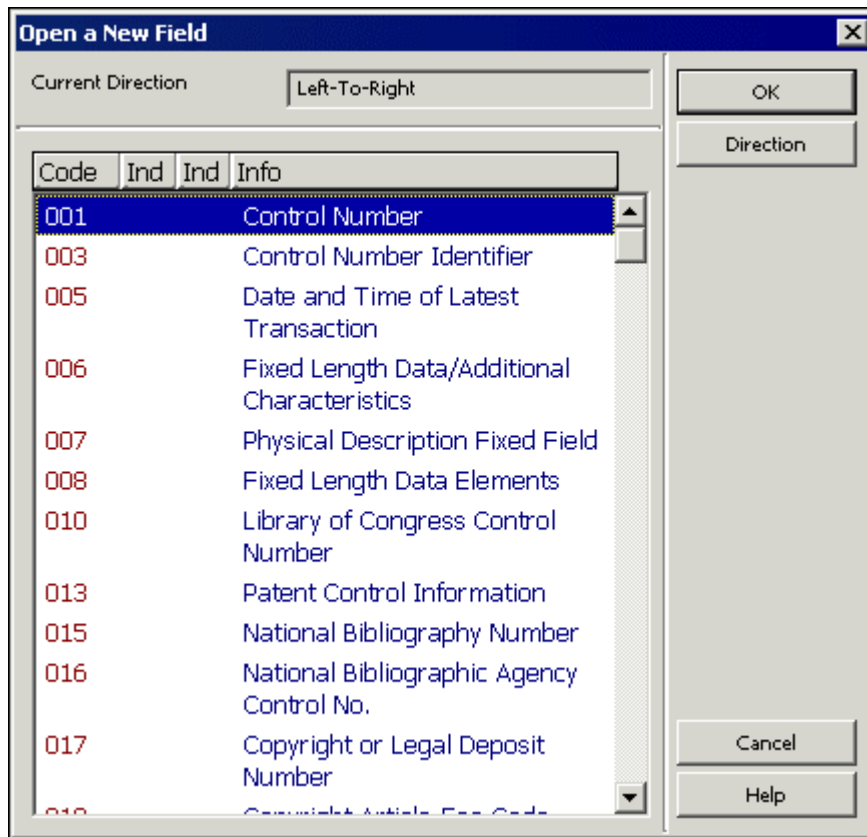


2. Highlight the format of your choice and click **OK**.

The new format will appear on the cataloging bar. Forms and checks that are format-sensitive will match the new format of the record.

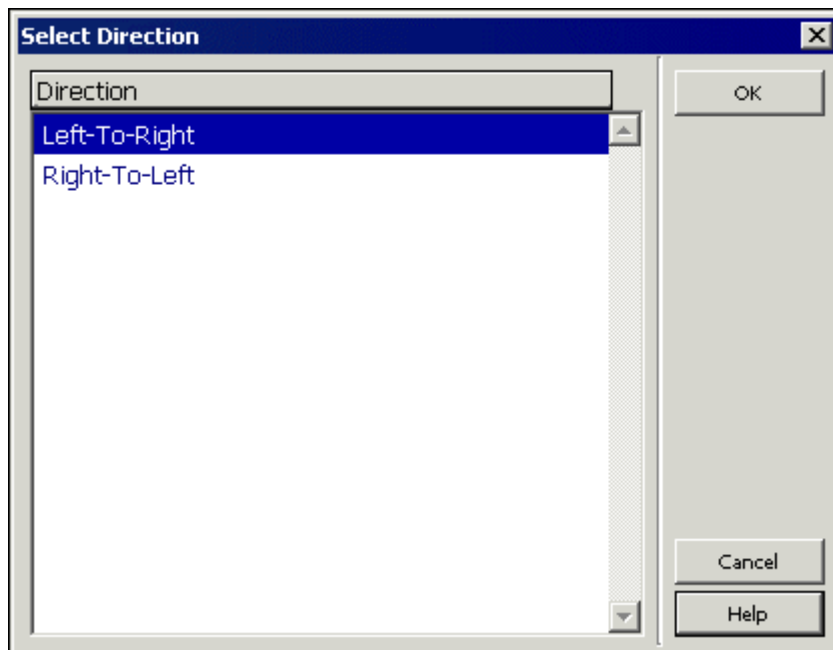
Add New Fields From a List

You can open a new field below the current field by selecting a field from a standard library-defined list. To do this, use the shortcut key F5 or choose the New Field (choose from list) option from the Edit Text menu. The dialog box with the list of fields will pop up.



To add a new field, press the first character of the field code to jump to the relevant section of codes. Then highlight the desired field and click **OK**. If subfields have been defined, the tag and its subfields will be displayed. If subfields have not been defined, by default only subfield "a" will be displayed.

Click **Direction** to change the text direction of the field, after highlighting the desired field to select it. Select the desired direction (Left-to-Right /Right-to-Left) from the dialog box that pops up and click **OK**.



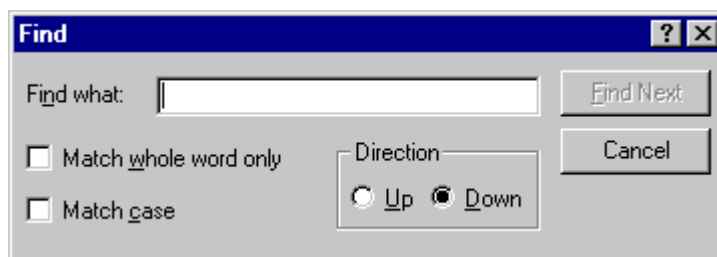
Search Headings and Options

Several types of search functions are available to help you fill in the contents of a field.

Find

To find specific text on the current record:

1. Select the Find option from the Edit Text menu. The Find window pops up:



2. In the "Find what" field, type the text you want to find in the record. To find only text with the same capitalization style as the text you type, select the "Match case" checkbox. To find only whole words instead of parts of words, select the "Match whole word only" check box.
3. Click **Find Next**.

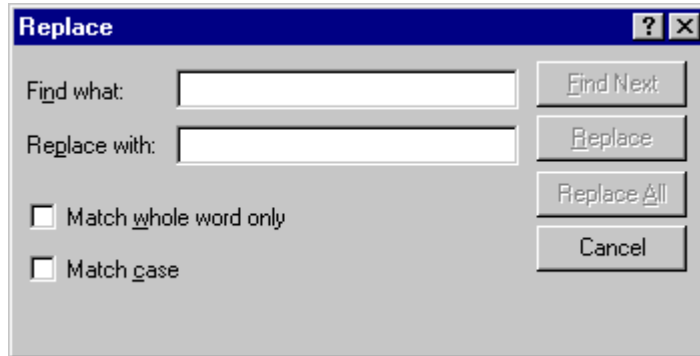
To find more occurrences of the text, click **Find Next** again.

The direction of the Find command in the record is defined according to the selected option in the Direction section of the window (Up or Down).

Replace

To find and replace text with another string:

1. Select the Replace option from the Edit Text menu. The Replace window pops up:




2. In the "Find what" field, type the text you want to replace in the record. To find only text with the same capitalization style as the text you type, select the "Match case" checkbox. To find only whole words instead of parts of words, select the "Match whole word only" checkbox.
3. In the "Replace with" field type the replacement text.

The **Find Next** button is used to find the selected text ("Find what" string). The **Replace** button replaces the first occurrence of the text with the new string. The **Replace All** button replaces automatically all occurrences of the text in the record with the new string.

Check Field and Check Record

To check the current field, place the cursor on the tag of the relevant field or in the contents area and select the Check Field option from the Edit Actions menu or use the shortcut key Ctrl+W.

To check the current record, select the Check Record option from the Edit actions menu or click the Check Record icon  from the Cataloging bar.

Upon completion of either check, the system displays the potential problems in the Messages tab of the lower pane. If no problems are found, the Messages tab is left empty.

<i>Leader</i>	LDR	---	----	^^^^^nam^a22^^^^^^u^4500
<i>Control No.</i>	001	---	----	000032252
<i>Date and Time</i>	005	---	----	20030302114644.0
<i>Fixed Data</i>	008	---	----	030302s2001^^^^^cau^^^^^^r^^^^^^000^0^eng^d
<i>ISBN</i>	020	---	a	0804739552 (paper: alk. paper)
<i>Main Title</i>	245	10	a	Futures :
			b	of Jacques Derrida /
			c	edited by Richard Rand.
<i>A.E. Pers. Name</i>	700	1	a	Rand, Richard,
			d	1939-
<i>A.E. Pers. Name</i>	700	1	a	Derrida, Jacques

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Doc Validation Error

? Required 260 field is either missing or duplicated

? Use 245 0# when there is NO main entry (1XX).

View Related

The View Related button becomes enabled when the highlighted message is related to a check routine that performs checks associated with another record connected to the one that is being checked. For example, whether or not a duplicate record is opened in the Direct (Z11) Index. When clicking on the View Related button, the system retrieves the related record, in the example below, the record that contains the direct index that appears as duplicate in the current record.

An example of the messages window is shown below:

<i>Leader</i>	LDR	---	----	00000cam^^22003254a^4500
<i>Date and Time</i>	005	---	----	20070409103211.0
<i>Fixed Data</i>	008	---	----	001002s2001^^^^^cau^^^^^^b^^^^^^110^0^eng^^
<i>ISBN</i>	020	---	a	0804739552 (alk. paper)
<i>ISBN</i>	020	---	a	0804739560 (paper : alk. paper)
<i>Dewey No.</i>	082	00	a	801/.95/092
			2	21
<i>Main Title</i>	245	00	a	Futures :
			b	of Jacques Derrida /
			c	edited by Richard Rand.
<i>Imprint</i>	260	---	a	Stanford, Calif. :
			b	Stanford University Press,
			c	2001.
<i>Physical Des.</i>	300	---	a	x, 252 p. ;
			c	23 cm.
<i>Subject-P.Name</i>	600	10	a	Derrida, Jacques
			v	ConWresses.
<i>Subject-Top.Trm</i>	650	0	a	Deconstruction
			v	Congresses

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Doc Validation Error

? Field 60010 : "\$aDerrida, Jacques\$\$vConWresses." is a new heading in the SUB list.

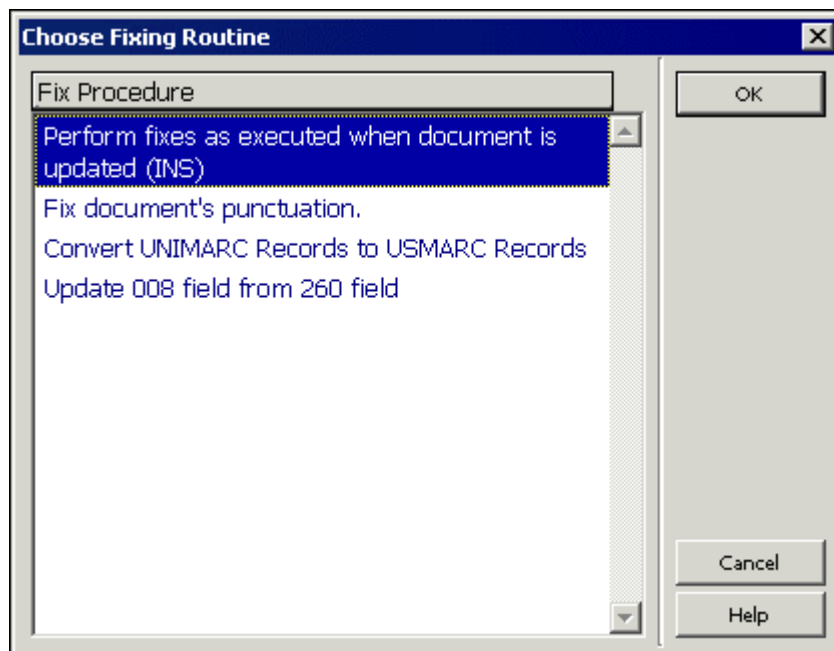
? Field 60010 : "\$aDerrida, Jacques\$\$vConWresses." is a new heading in the SUL list.

View Related

Fix Record and Derive New Record

The Fix Record option automatically fixes the current record according to standard library-defined procedures (fix routines). The Derive New Record function enables you to use fix routines in order to create a new record rather than fix the current one. The Fix Record and Derive New Record options are available from the Edit Actions menu.

Routines that have been set to fix the current record appear under the Fix Record option. Routines that have been set to create a new record appear under the Derive New Record option. For both functions, the fixing procedures are listed in the Choose Fixing Routine window:



View Record's Catalogers

This option enables you to view the list of catalogers who have edited the current record. To do this, select the View Record's Catalogers option from the Edit actions menu. A window will be displayed listing all the catalogers who have edited the selected record. The cataloger level of each person is given, along with the cataloging hour and date:

Cataloger	Level	Date	Hour
		09/10/10	17:46
MASTER	99	22/08/12	08:57
ALEPH	99	22/08/12	10:32
MASTER	99	22/08/12	10:34

Edit Text Mode

This option functions as a toggle switch. When it is activated (either via the Edit Actions menu or via a shortcut key - Ctrl + F12), the system is ready to receive input. The input is displayed on the status bar as it is typed in.

The input is in the form of command-like language. Examples:

1. search tag=100
2. search sf=a
3. search text=revolution

In the first example above, "search" is the operation code, "tag" is the parameter (that is, which element to search for), and "100" is the value (in this case, the tag) to be searched for.

When the typing of the text is finished, the Enter Text Mode option should be activated once again in order to end the text mode, execute the command and return to the regular edit mode.

The following rules apply to the Text Mode mechanism:

- Currently the only operation code supported is "search" for tags ("tag"), subfields ("sf") and text ("text").
- The operation code and parameter(s) are not case-sensitive.


- There must be at least one space between the operation code and the parameter(s).
- No spaces are allowed on both sides of the "=" sign positioned between a parameter and its value.
- When searching for text, the search is not case-sensitive. In addition, if the text contains spaces, type "^" (caret) instead of a space.
- When searching for a tag or text, the record is scanned cyclically. That is, if the tag or text is not found till the end of the record, the search continues from the beginning of the record up to the cursor's location.
- When searching for a tag, use a hash ("#") as a wildcard. That is, to search for "10010" or "10000" enter "100##"; to search for "200" or "220" enter "2##".
- When searching for a subfield, the search scope is from the location of the cursor up to the end of the current tag.

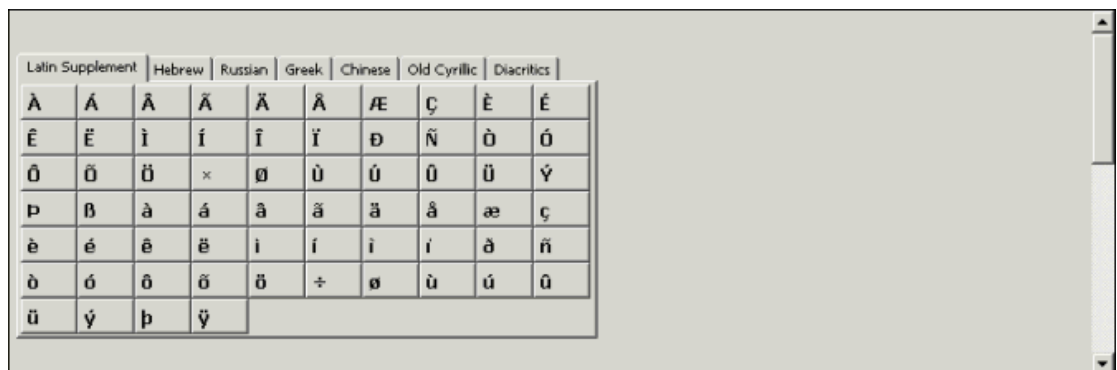
4.4 ALEPH Keyboard

The ALEPH Keyboard is a utility that displays a virtual keyboard on your screen. It enables you to insert characters that are not present in your workstation's standard keyboard.

According to the configuration settings, the ALEPH Keyboard can be divided into tabs, each one displaying a group of characters.

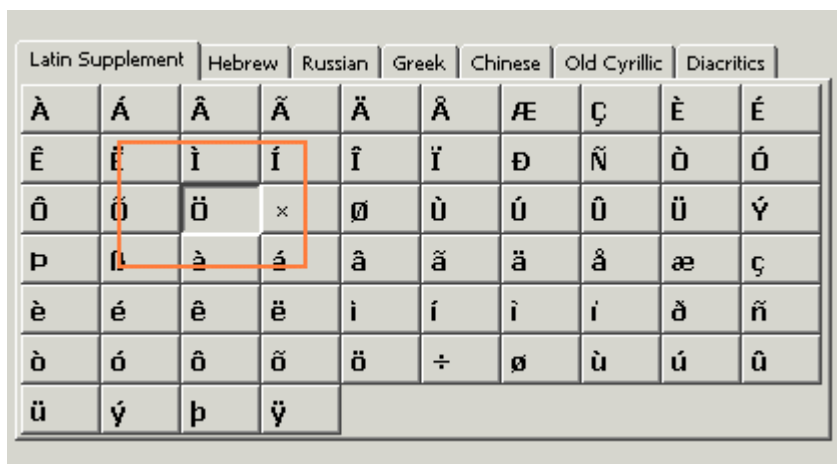
To use the ALEPH Keyboard in the Cataloging module, follow the process described in this step-by-step example:

1. From the Cataloging menu, select the **Activate Keyboard** option, or use the shortcut key Ctrl+K, or click the Activate Keyboard icon  from the Cataloging bar. The ALEPH Keyboard is displayed in the lower pane:

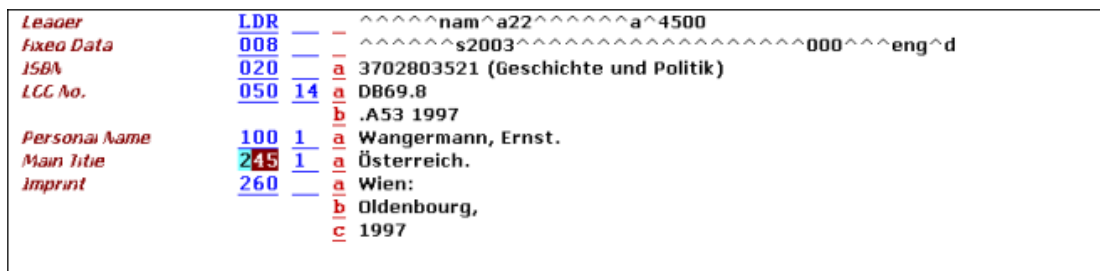



- Choose the appropriate tab and type text by clicking on the corresponding on-screen character keys. The characters selected from the keyboard are automatically inserted into the cataloging record being edited. These characters are added to the record at the cursor's last position.

In the example below, the title of a book in German is *Österreich*. The first character of the title contains a diacritic, an "O" with an umlaut. When the Ö is typed from the ALEPH Keyboard, as shown below:



it is automatically inserted into the cataloging record (in this case, in the 245 field before the letters *sterreich*:

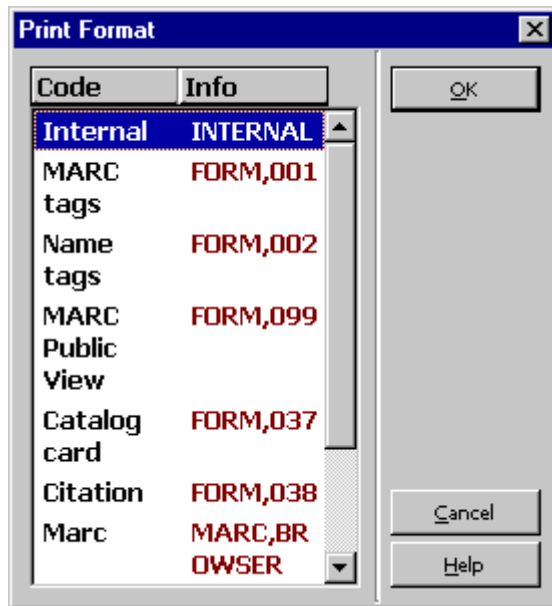


Deactivate the ALEPH Keyboard by clicking **Close**, or by selecting the **Activate Keyboard** option from the **Cataloging** menu, or by clicking the **Activate Keyboard** icon  from the **Cataloging bar**.

4.5 Printing a Record

This function enables you to print the currently displayed record. To do so, follow these steps:

1. Use the shortcut key Ctrl+P or select Print from the Cataloging menu. The Print Format dialog box is displayed:




2. Select by highlighting the appropriate printing format for your record from the Print Format dialog box (that is, MARC Tags, Name tags, and so on). The record will be printed in the selected format.

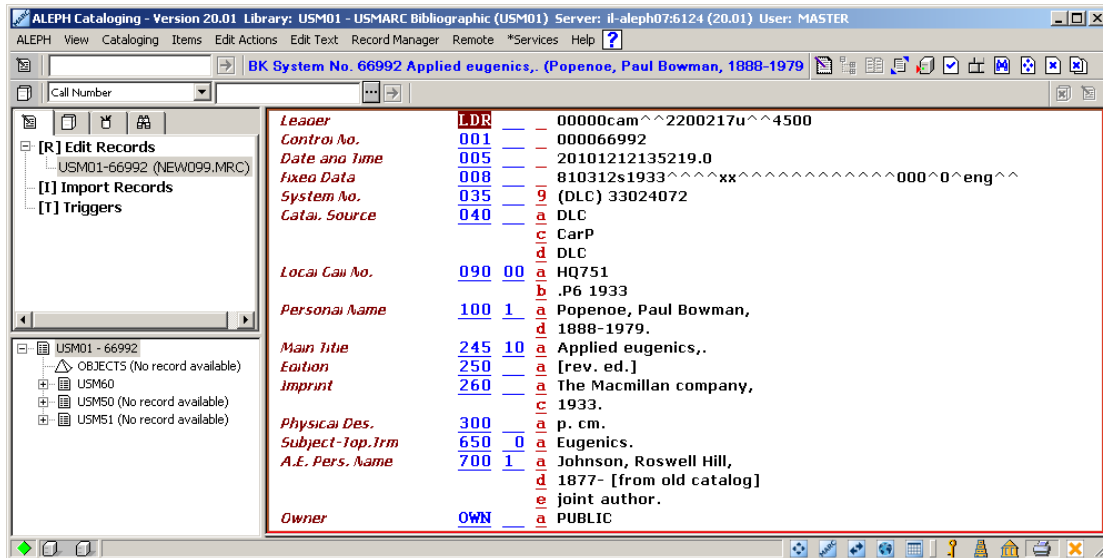
4.6 Different Ways to View a Catalog Record

4.6.1 Full Screen

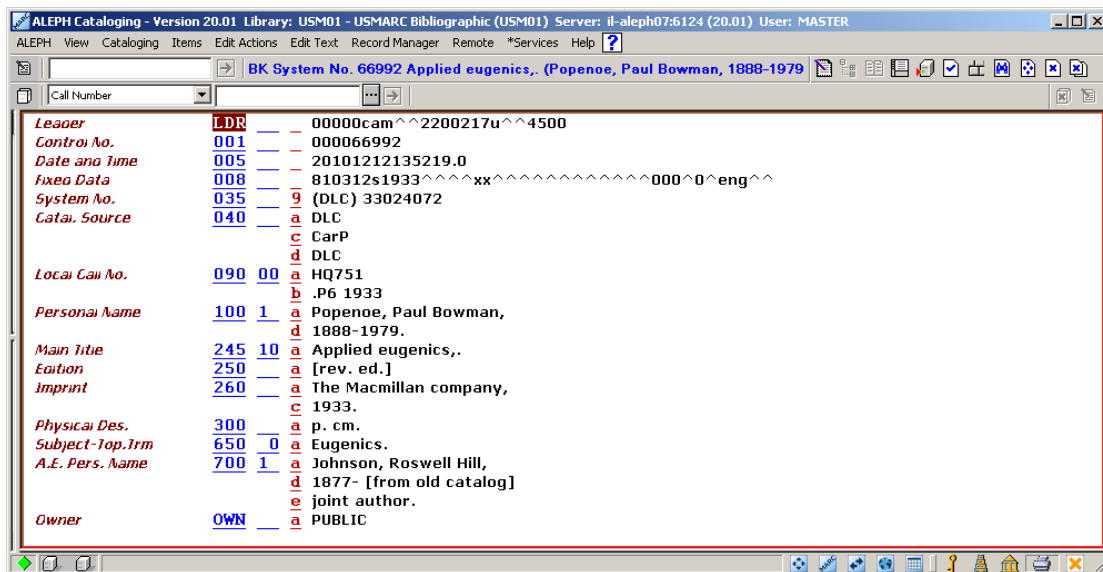
The Full Screen option enables you to display as much as possible on the screen of the cataloging record currently being edited.

The full screen option is only available for the Edit Records node. If you click the Full Screen button, work on a record and then move to another node (such as Triggers), the full screen option will be overridden and the normal screen option presented.

To view the current cataloging record in Full Screen mode, select the Full Screen option from the View menu or click the Full Screen icon  from the Cataloging bar. When this option is selected, the lower pane is not displayed and the cataloging record takes up the upper and lower pane:




If the option is selected once again, the navigation pane is not shown and the cataloging record takes up the whole screen:



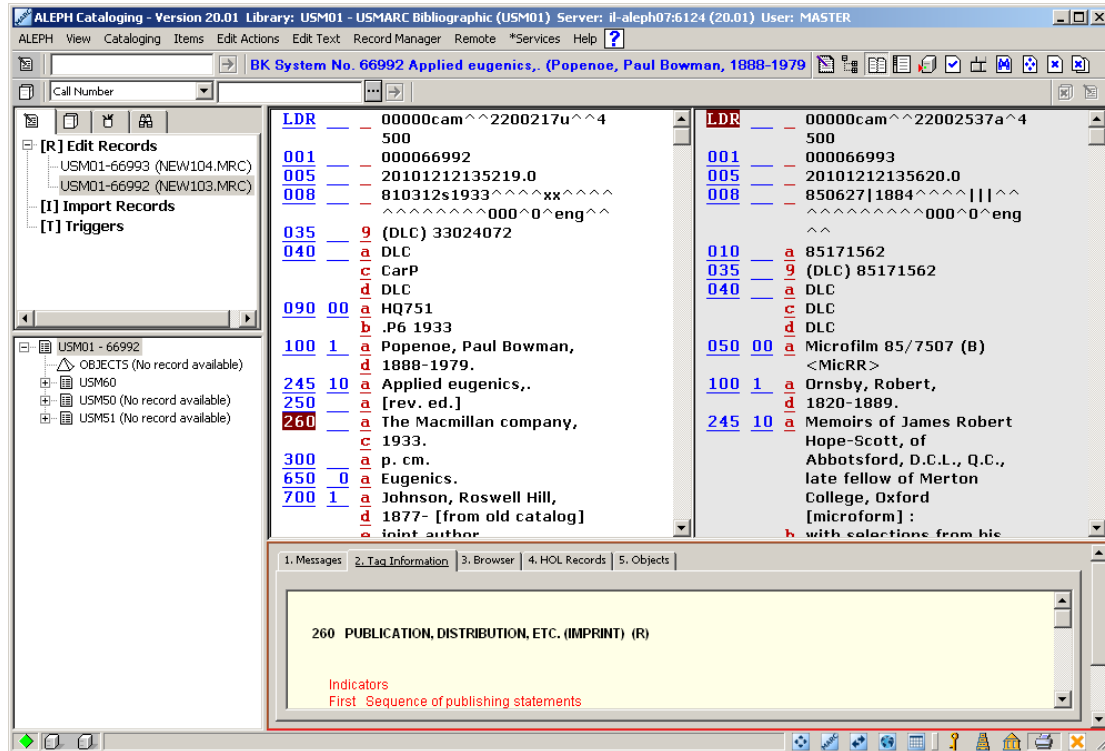
To turn off the Full Screen mode and switch to the previous view, select again the Full Screen option from the View menu or click the Full Screen icon from the Cataloging bar.

4.6.2 Split Editor Mode

Split Editor Mode enables you to split the Catalog Editor into two sections for viewing and/or editing two cataloging records simultaneously.

To switch into the Split Editor mode, select the Split Editor Mode option from the Cataloging menu or click the Split Editor Mode icon  from the Cataloging bar.

To view a record in a particular section, first highlight the desired section from the upper pane and then either open a new record by calling it up from the Cataloging bar or by selecting an already opened record from the list of records displayed under the Edit Records node of the Navigation Tree in the Cataloging tab. The following is an example of the Split Editor mode:

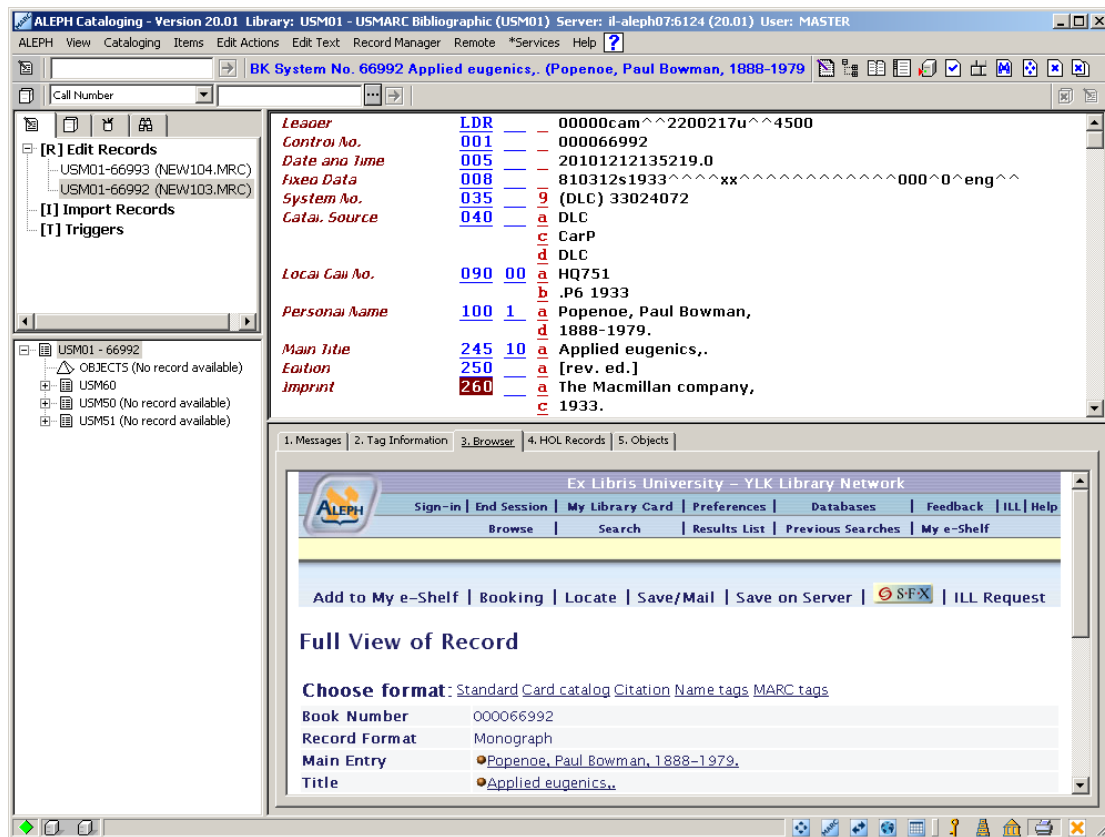


Click **Records Navigation** from the **Cataloging** menu (or press its assigned shortcut key, for example, **Ctrl + G**) to cycle through open records (in the record tree). This allows you to edit the next open record and to highlight its node in the Record tree as the currently edited record.

To turn off **Split Editor Mode** and switch to the previous view, click again **Split Editor Mode** from the **Cataloging** menu or click the **Split Editor Mode** button from the Cataloging bar.

4.6.3 View in Web OPAC

This option lets you view the record that is being edited in Web OPAC format. The record is shown in the Browser tab of the lower pane in the Cataloging tab after the View in Web OPAC option has been selected from the Cataloging menu or when you use the **Ctrl + O** hotkey:



The record is displayed as it is in the database and might not reflect the specific state of editing registered in the cataloging draft (upper pane). This option is only available for records that have already been sent to the server.

4.7 Closing Records

You can find two commands for closing records under the Cataloging menu. They are:

Function	Shortcut Key	Description
Close All Records	None	This option enables you to close all the records that are currently opened. The list of opened records appears under the Edit Records node of the Navigation Tree in the Cataloging tab.
Close Record	None	This option enables you to close the record that is currently displayed in the upper pane.

5 Search Headings and Options

Several types of search functions are available to help you fill in the contents of a field:

- Browse URL
- Search Field Headings of Current Base
- Search Field Headings of Other Base
- Search Subfield Headings of Current Base
- Search Subfield Headings of Other Base
- Search Subfield Options

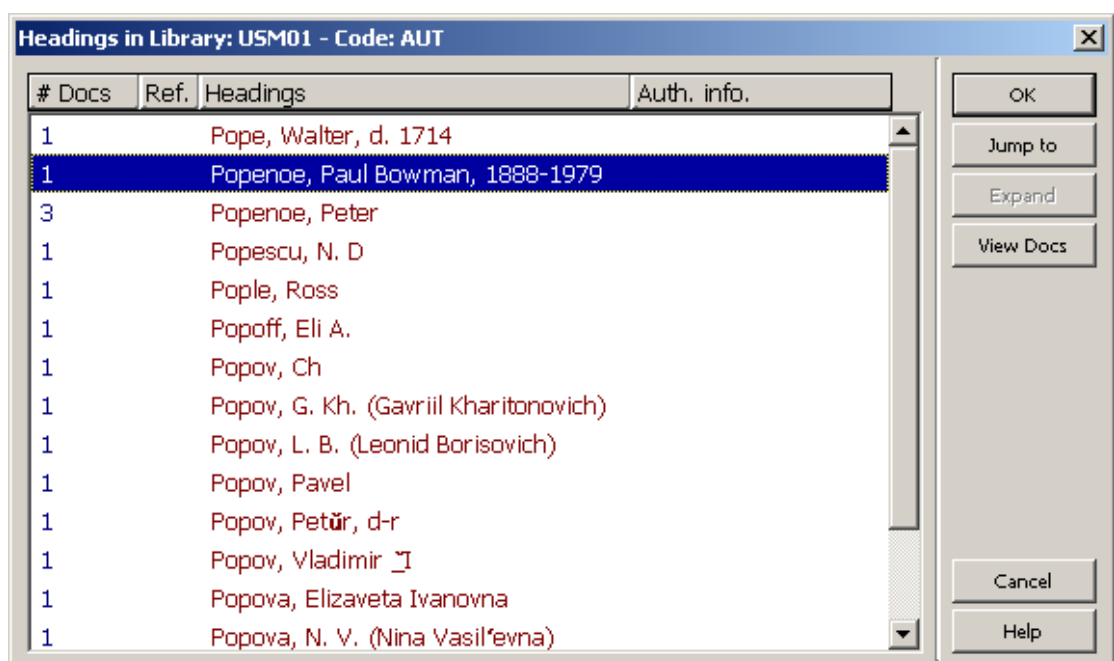
The ability to search headings speeds up data entry and ensures consistency of cataloging standards by allowing you to select previously used text which you can use as the basis for data entry in your catalog record. You can also add data from a library/base other than the home library/base to which you are currently connected, for example, from an authority library or from any other database defined by the system librarian.

5.1 Search Field Headings of Current Library

When adding contents to a field of a bibliographic record, you may choose from a list of headings in your current library. To do this, follow these steps:

1. Place your cursor on the tag of the relevant field or in the contents area, and enter the initial text of the field.
2. Press the F3 shortcut key or choose the Search Field Headings of Current Base option from the Search submenu of the Edit Actions menu.

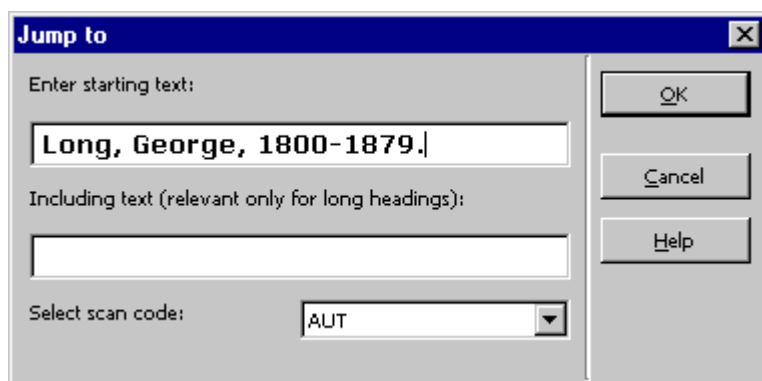
A pop-up dialog box appears with headings for the relevant field.



Highlight the desired heading and click OK.

The highlighted heading is copied into the contents area of the field. If the heading also has information for individual subfields attached to it, all the subfields are copied into the contents area of the record. If the selected heading is a "See From" reference, then the actual heading from the authority record is inserted in the catalog draft. For example, if "Aplaton" is selected, the preferred term - "Plato" - is inserted into the contents area of the field (this occurs only if the UPD field of the authority record is set to **Y**). If the selected heading is not in the authority database, then it is inserted as is.

To search another portion of the Headings List, click **Jump to**. Enter the starting text for the desired heading (note that the original heading is displayed automatically in the "Enter starting text" field. To jump to the desired heading, overwrite the original text with the new text) and click **OK**.



The list is redisplayed from the text requested; you can now highlight the selected heading and copy it to the catalog draft.

You can change the scan code on-the-fly through the "Jump to" window. To do this, select a new scan code from the pull-down menu, enter the starting text for the heading and click **OK**. The new Headings list is displayed.

You can also use the "Including text" field to jump more efficiently in the case of long headings. For example, if you reach a section of long headings with the same initial text, then by using the "Including text" field, you can enter the text specific to the desired heading and when clicking the **OK** button, the list will be redisplayed and the relevant heading will be highlighted.

5.1.1 Expand

Headings (preferred or non-preferred) that have an associated Authority record display Authority information (for example, authority library code, field code, usage codes, UPD field) in the Authority Information column in the List of Headings dialog box. Note that if the heading in the authority database is an ambiguous heading, the Authority Information column contains ??? (three question marks). A plus sign (+) in the Ref. Column indicates that the heading is a non-preferred term. In both cases, non-preferred or preferred, when clicking the Expand button, the associated Authority record is displayed in Full format. If you want to edit or view the catalog card of the

retrieved Authority record, then click **Select**. The catalog draft of the Authority record is displayed.

5.1.2 View Docs

Clicking the **View Docs** button allows you to view all the records related to the selected heading.

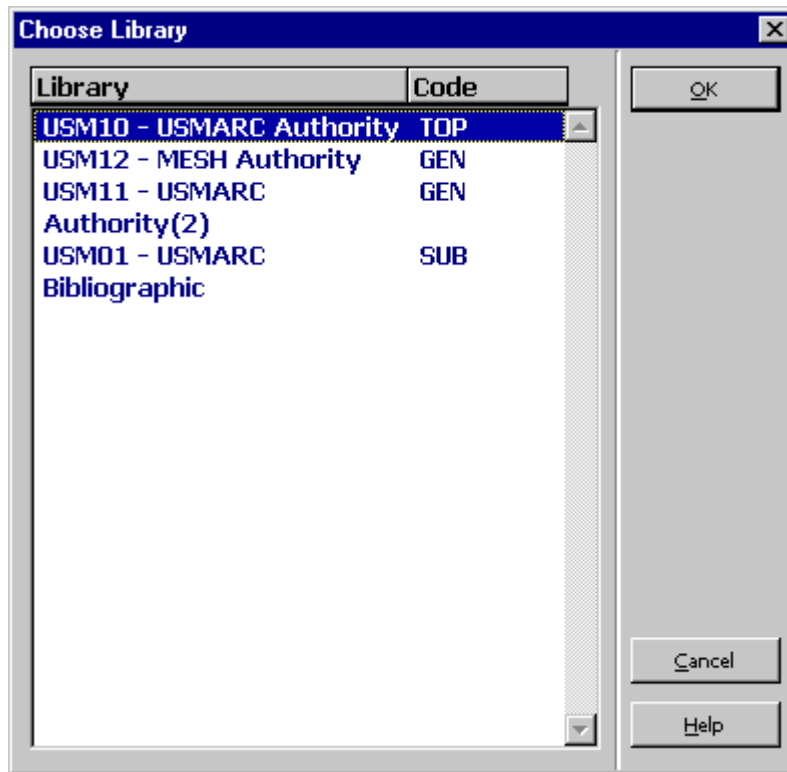
If only one record is related to the heading, a window with the record in Full format is displayed. You can view the catalog draft or edit the record by clicking **Select**.

If more than one record is related to the heading, a window with the list of the records in Brief format is displayed. To display the selected record in Full format, highlight a record and click **View Full**. From both windows, you can either view the catalog draft or edit the record by clicking **Select**.

5.2 Search Field Headings of Other Base

When adding contents to a field of a bibliographic record, you may choose from a list of headings in a library/base other than the home library/base to which you are currently connected. For example, you could search Authority libraries. To do so:

1. Place your cursor on the tag of the relevant field or in the contents area, and enter the initial text of the field.
2. Press the Ctrl+F3 shortcut key or choose the Search field headings of the Other Base option from the Search submenu of the Edit Actions menu.
3. If more than one base is available, a pop-up library list appears. Highlight the desired base and click **OK**.



A pop-up dialog box appears with headings for the relevant field.

4. Highlight the desired heading and click **OK**.

The highlighted heading is copied into the contents area of the field. If the heading also has information for individual subfields attached to it, all the subfields are copied into the contents area of the record. If the selected heading is a "See From" reference, then the actual heading from the authority record is inserted into the catalog draft. For example, if "Aplaton" is selected, the preferred term - "Plato" - is inserted into the contents area of the field (this occurs only if the UPD field of the authority record is set to **Y**).

To search another portion of the Headings List, click **Jump to**. Enter the starting text for the desired heading and click **OK**.

The list is redisplayed from the text requested; you can now highlight the selected heading and copy it to the catalog draft.

You can also change the scan code on-the-fly through the Jump to window. To do this, select a new scan code from the pull-down menu, enter the starting text for the heading and click **OK**. The new Headings list is displayed.

You can also use the "Including text" field to jump more efficiently in the case of long headings. For example, if you reach a section of long headings with the same initial text, then by using the "Including text" field, you can enter the text specific to the desired heading. Click **OK** to redisplay the list and highlight the relevant heading.

Note that you can specify a base more than once to enable the user to select more than

one scan code for the field or subfield option. This option can also include a selection of codes from the local home library/base.

5.3 Search Subfield Headings of Current Base

When adding contents to a subfield of a bibliographic record, you can choose from a list of headings in your current base. For example, you could search for publishers for the MARC 21 field 260, subfield b. To do so:

1. Place your cursor on the tag of the relevant subfield code or in the contents area and enter the initial text of the subfield.
2. Press the F4 shortcut key or choose the Search subfield heading of the Current Base option from the Search submenu in the Edit Actions menu.

A pop-up dialog box appears with headings for the relevant subfield.

3. Highlight the desired heading and click **OK**. The highlighted heading is copied into the contents area of the subfield.

To search another portion of the Headings List, click "Jump to". Enter the starting text for the desired heading and click **OK**.

The list redisplay from the text requested; you can now highlight the selected heading and copy it to the catalog draft.

You can also change the scan code on-the-fly through the Jump to window. To do so, select a new scan code from the pull-down menu, enter the starting text for the heading and click **OK**. The new Headings list is displayed.

You can also use the "Including text" field to jump more efficiently in the case of long headings. For example, if you reach a section of long headings with the same initial text, by using the "Including text" field you can enter the text specific to the desired heading. Click **OK** to redisplay the list and highlight the relevant heading.

Note that when there is more than one subfield in the Search subfield heading of the current/other base window, all of the text in the subfields will be retrieved. You can edit it later.

5.4 Search Subfield Headings of other Base

When adding contents to a subfield of a bibliographic record, you may choose from a list of headings in a library/base other than the home library/base to which you are currently connected. For example, you could search for publishers in the MARC 21 field 260, subfield b. To do so:

1. Place your cursor on the tag of the relevant subfield code or in the contents area and enter the initial text of the subfield.
2. Press the Ctrl + F4 shortcut key or choose the Search subfield headings of other base option from the Search submenu in the Edit Actions menu.
3. If more than one base is available, a pop-up base list appear. Highlight the desired base and click **OK**.

A pop-up dialog box appears with headings for the relevant subfield.

4. Highlight the desired heading and click **OK**.

The highlighted heading is copied into the contents area of the subfield.

To search another portion of the Headings List, click **Jump to**. Enter the starting text for the desired heading and click **OK**.

The list is redisplayed from the text requested; you can now highlight the selected heading and copy it to the catalog draft.

You can also change the scan code on-the-fly through the Jump to window. To do this, select a new scan code from the pull-down menu, enter the starting text for the heading and click **OK**. The new Headings list is displayed.

You can also use the "Including text" field to jump more efficiently in the case of long headings. For example, if you reach a section of long headings with the same initial text, then by using the "Including text" field, you can enter the text specific to the desired heading. Click **OK** to redisplay the list and highlight the relevant heading.

Note that you can specify a base more than once to enable the user to select more than one scan code for the field or subfield option. This option can also include a selection of codes from the local home library/base.

5.5 Search Subfield Options

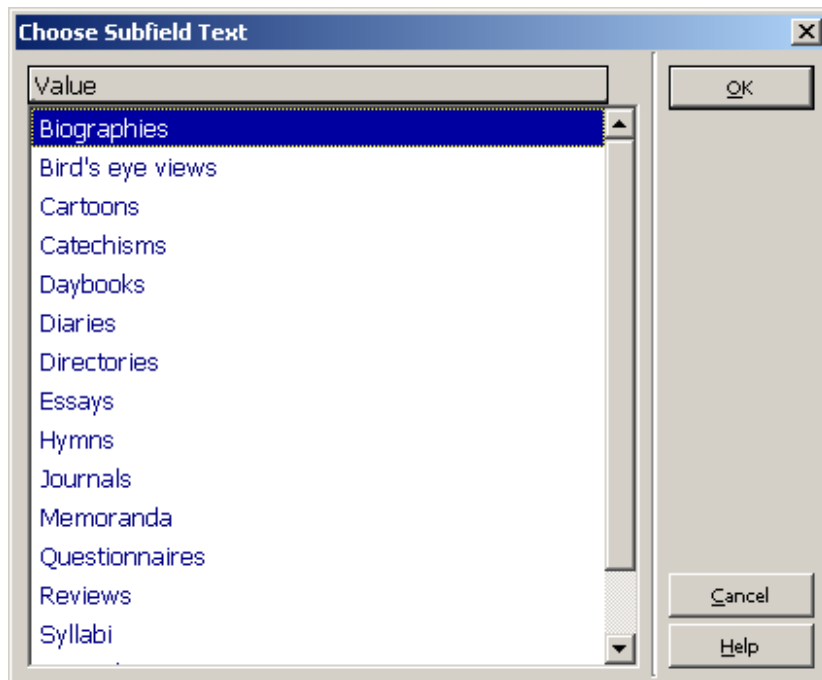
For a select number of subfields, you can choose text from a list of options that have been defined by your local library. To do this, follow these steps:

1. Place the cursor on the subfield of interest.
2. Press the Ctrl + F8 shortcut key or select Search Subfield Options from the Search submenu of the Edit Actions menu.

A pop-up dialog box appears with choices of text for the relevant subfield.

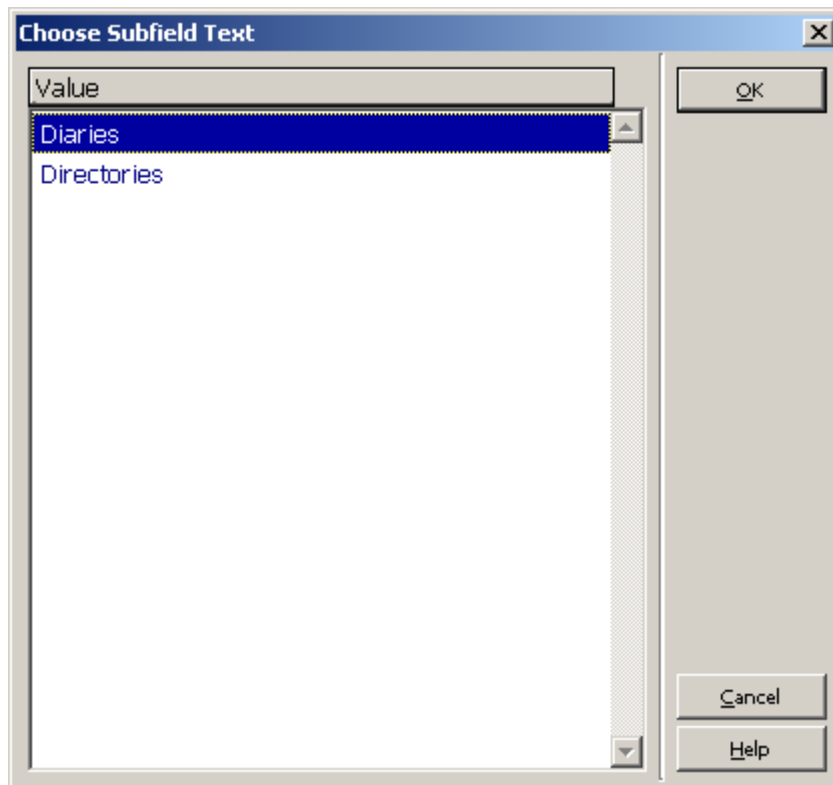
3. Highlight the desired text and click **OK**.

An example of the options defined for subfield 'a' of the field 655 MARC 21 is shown below:



The highlighted text is copied into the contents area of the subfield.

For subfields that have a list of options defined, you can also type the beginning of the text and press the Tab key. If the string is unique, the system automatically fills in the text. On the other hand, if the text is not unique, for example, "Di" for MARC 21 field 655, subfield a, the options window displays all options that match the string enabling you to choose your desired option. An example for the options that start with "Di" for subfield 'a' of the field 655 MARC 21 is shown below:



For this to work, the cursor must be at the end of the text string (that is, not in the middle of the string). Note that this feature is case-sensitive.

For the "Tab" mechanism functionality, the TabCompletion flag of the catalog.ini file must be set to **Y**.

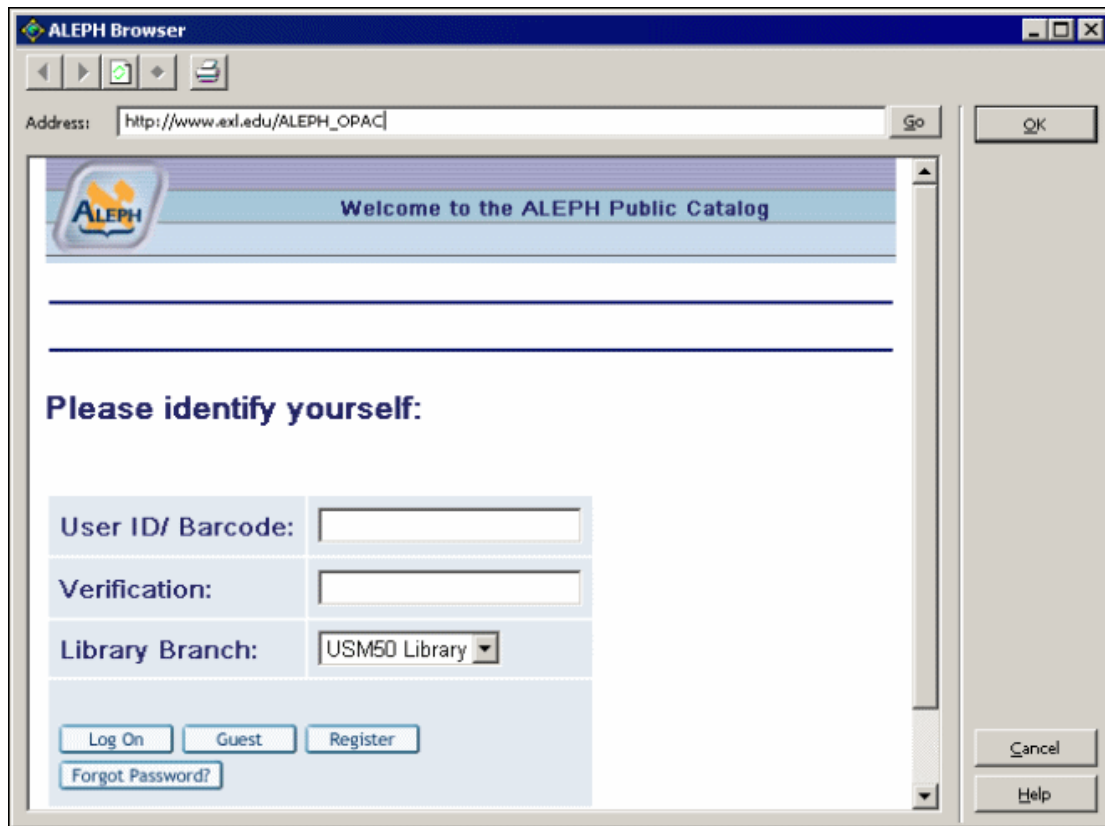
5.6 Browse URL

In some cataloging fields, subfield \$u is used to store the URL (Uniform Resource Locator). You may want to check the URL before saving or updating the record. To do so, follow these steps:

1. Place the cursor on the field of interest (for example, the 856 field).
2. Select the Browse URL option from the Search submenu of the Edit Actions menu. The ALEPH Browser is displayed.

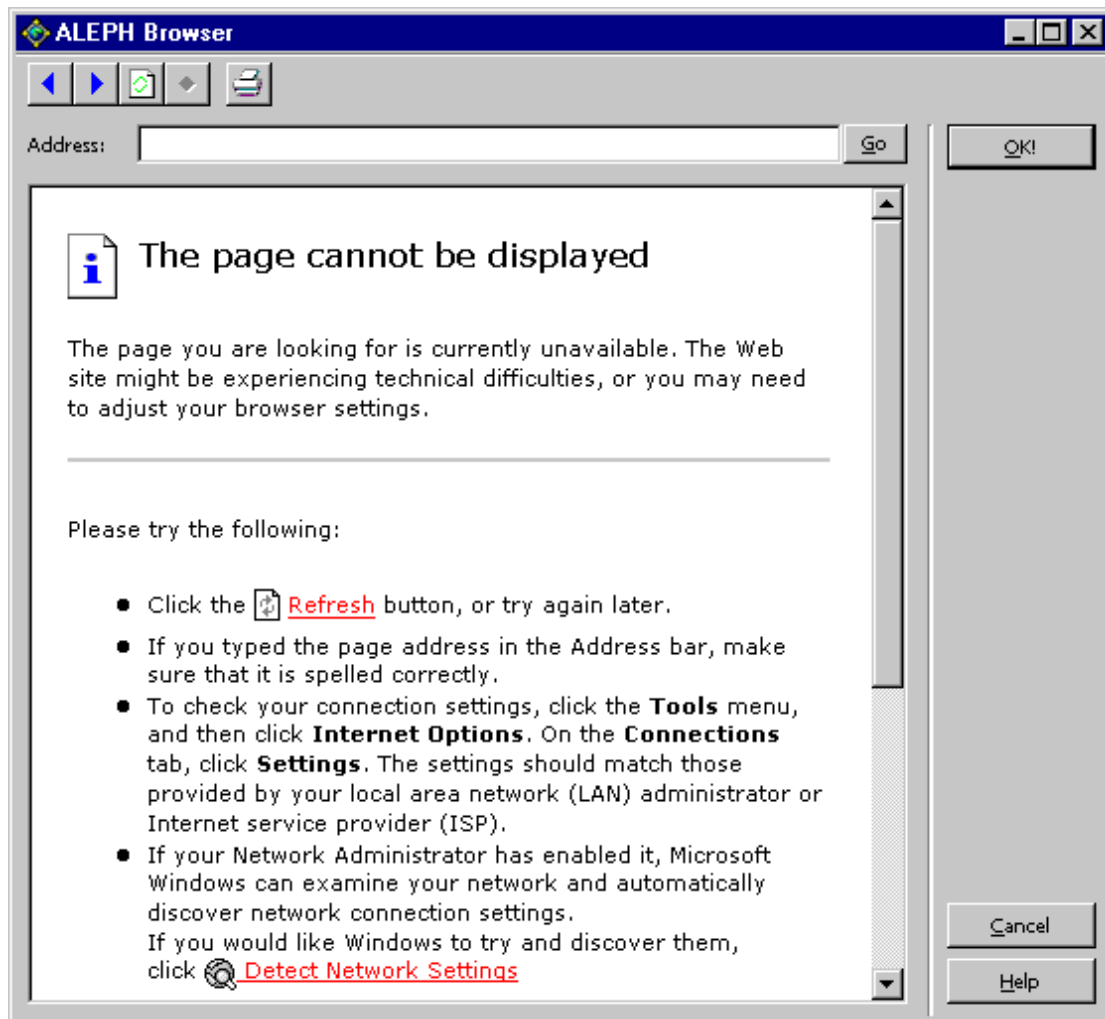
The ALEPH Browser searches automatically for the address defined in subfield \$u of the selected field and displays the corresponding page.

Following is a sample page displayed by the ALEPH Browser:



If the address is incorrect or if you want to try a different URL, type the new address - for example, <http://www.exlibris.co.il> - in the Address bar, and then click the **Go** button. The new page is displayed. If this is the address that should be cataloged, you can click **OK** to copy the new URL into the contents area of subfield \$u.

Note that if the selected field does not have subfield \$u, then the ALEPH Browser opens up without any address in the Address bar and the standard message-page appears, which specifies: "The page cannot be displayed."



In addition, you can use the browser's buttons for standard browsing, as follows:

- To return to the last page you viewed, click the *Back* button (the blue arrow pointing to the left icon).
- To view the page you viewed before clicking the *Back* button, click the *Forward* button (the blue arrow pointing to the right icon).
- To make sure you have the latest version of the page, click the *Refresh* button (the white page icon).
- To print the current page, click the *Print* button (the printer icon).

6 Saving Records

There are three options for saving records:

- Save Record on Local Drive

- Save All on Local Drive
- Save on Server and Local Drive

Note that the options above are only enabled when the Catalog Editor (upper pane - the record being edited) is highlighted.

6.1 Save Record on Local Drive

You may want to save records on your local drive either to continue working on them later or because communication links with the server have been severed. The Save on Local Drive option will save your record on your PC's hard disk, making it unavailable for anyone else to find in the OPAC.

To save the current record on your local drive, select the Save on Local Drive option from the Cataloging menu.

The record will be saved, but you will not receive a message informing you that it has been saved. You may immediately continue editing the record. No updates will be registered unless the record is saved again.

Local records can be saved automatically by defining the interval (in minutes) between "autosaves" through the AutoSaveTimeout variable in the catalog.ini file of the catalog/tab directory. If the variable is set to zero, the local record is not saved automatically.

6.2 Save All on Local Drive


The Save All on Local Drive option is similar to Save on Local Drive, except that it saves every record that is open on your cataloging client. To save all open records on your local drive, select the Save All on Local Drive option from the Cataloging menu.

The records will be saved but you will not receive a message informing you that they have been saved. You may immediately continue editing the records. No updates will be registered unless the record is saved again.

Local records can be saved automatically by defining the interval (in minutes) between "autosaves" through the AutoSaveTimeout variable in the catalog.ini file of the catalog/tab directory. If the variable is set to zero, the local record is not saved automatically.

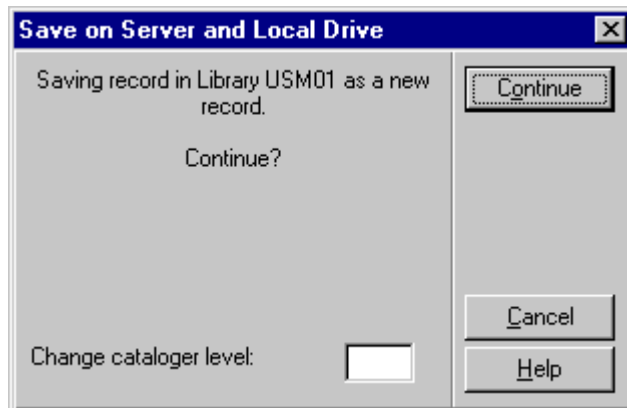
6.3 Save on Server and Local Drive

The Save on Server and Local drive option updates the server database and assigns a system number to new records (as opposed to their current local number). This option will also save the selected record on your local drive.

To save the current record on the server and in your local drive, select the Save on Server and Local drive option from the Cataloging menu or click the  icon from the Cataloging bar. You can also use the Ctrl+L shortcut key.

If the record originated on your local drive and has not yet been assigned a system number, using this function will assign a system number to the record.

You will receive a prompt asking if you do, in fact, want to save the record.



If you do want to save the record now, click **Continue**.

The prompt also enables you to change the cataloger level. This is useful if you want to close a record to catalogers at your level and pass it on to catalogers of a higher level, or to open a record to catalogers of a lower level. If you leave this field blank, the system will automatically assign your cataloger level to the record.

The system follows certain rules about which person's changes will be saved on the server:

1. A lower-level cataloger cannot overwrite records that were saved by a higher-level cataloger.
2. The system can be set up so that if two catalogers have called up the same record at the same time, if one cataloger has updated the record in the database, the other cataloger cannot send his update. A message appears, informing the cataloger that the record was updated in the interim by another user, giving the cataloger's username and the time of update, and a prompt appears, so that the cataloger can recall the updated record from the server. In order to block the update in this manner, check number 0221 ('Record was updated by another user') must be set to "M" in check_doc_mandatory.

From the Messages tab of the lower pane (after closing the Record Check Warnings/Errors window), the View Related button can be used to retrieve the updated copy of the record and the cataloger is now enabled to add his changes to the most updated version of the record.

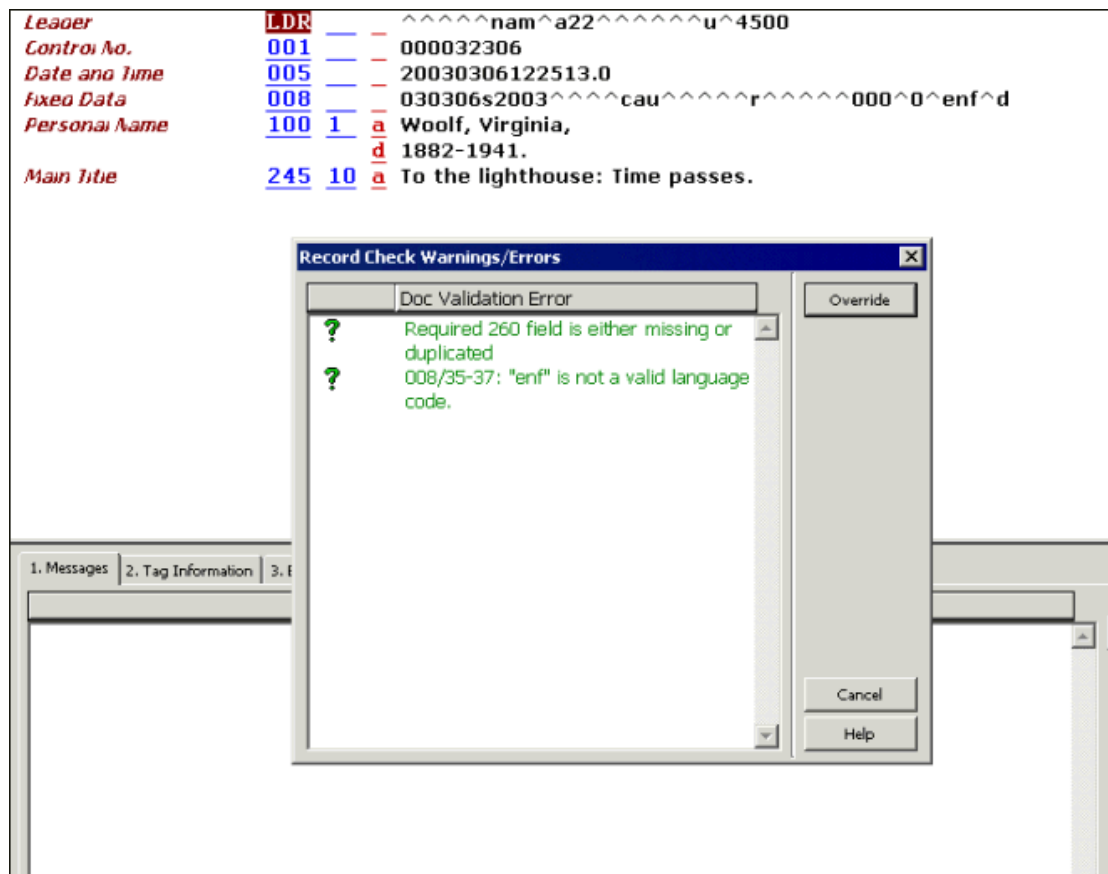
In addition, if the record was updated by one of the system processes (for example, indexing), the changes made by the user are not automatically saved on the server. Instead, a message informing him that the record was updated by the system is displayed. As with the previous message, the View Related button from the messages window can be used to retrieve the most updated copy of the record.

3. Update authorization can be set, based on the OWN field of the record. If the OWN field (Cat. OWN permission) of the user is equal to the OWN field of the record; or if the OWN field of the user is 'GLOBAL'; or if the content of the OWN field of the record is 'PUBLIC'; then the cataloger will be allowed to update the record.
4. Update permission can be denied for specific fields.

Note

When a record is saved on the server, fields that do not have any content are deleted.

Before updating the database, the system automatically checks the current record. Upon completion of the check, you will receive a list of potential problems.



This window lists two types of errors:

- Forbidden errors (in red text with an exclamation mark). The record cannot be saved if there are any forbidden errors. Click **Cancel** to continue editing the record.
- Triggers (in green text with a question mark). The record can be saved if there are triggers and the override button appears on the window. To save the record, click **Override** or click **Cancel** to continue editing the record.

If the **Cancel** button is selected, the Record Check/Warnings Errors window is closed and the list of potential errors is displayed in the Messages tab of the lower pane.

7 Open Existing Records

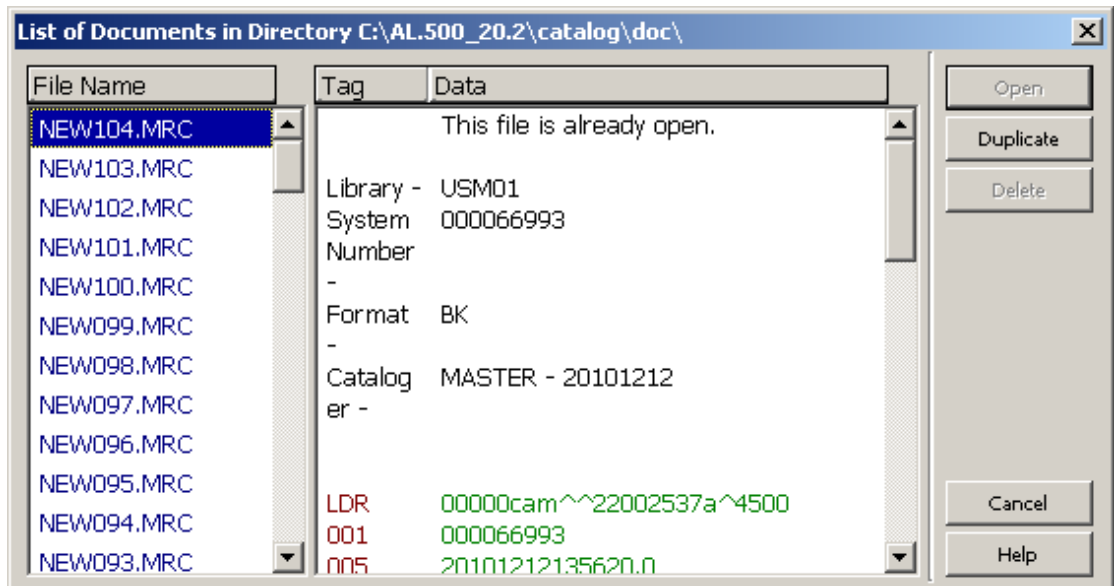
Existing records can be called up for re-editing. There are a number of ways to call up existing records:

- Open Record on Local Drive
- Load Record from Server
- Push from the Search Tab
- Load ADM Record from Server
- Load HOL Record from Server

7.1 Open Record on Local Drive

Local records may be called up for re-editing or saving on the server. To open a record located on your local drive, follow these steps:


1. From the Cataloging menu, select the Open Record on Local Drive option. This option opens a list of all local records:

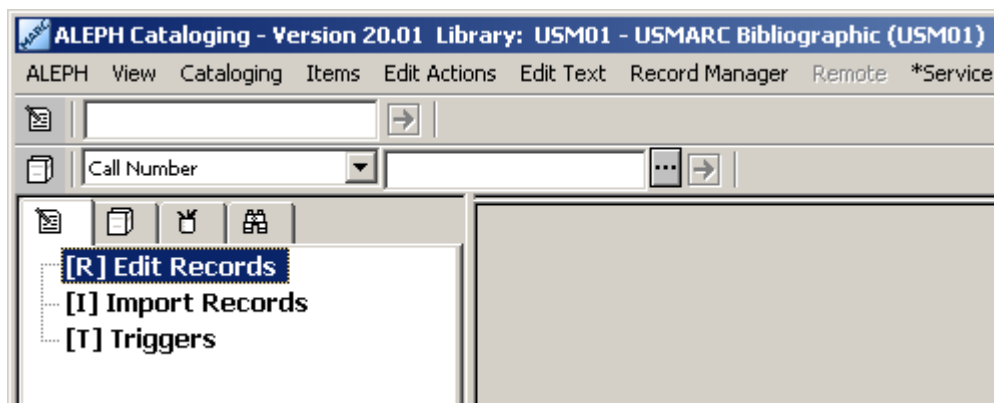


- From the pop-up dialog box, highlight the record of your choice and click the Open button. The record is displayed in the Catalog Editor (the upper pane of the Cataloging tab). You can now re-edit or save the record on the server (See Editing Records on page 28 or Saving Records on page 70).

7.2 Load Record from Server

To retrieve a record that is located on the server, follow these steps:

- Enter the system number of the record in the System Number field of the Cataloging bar and click the arrow :

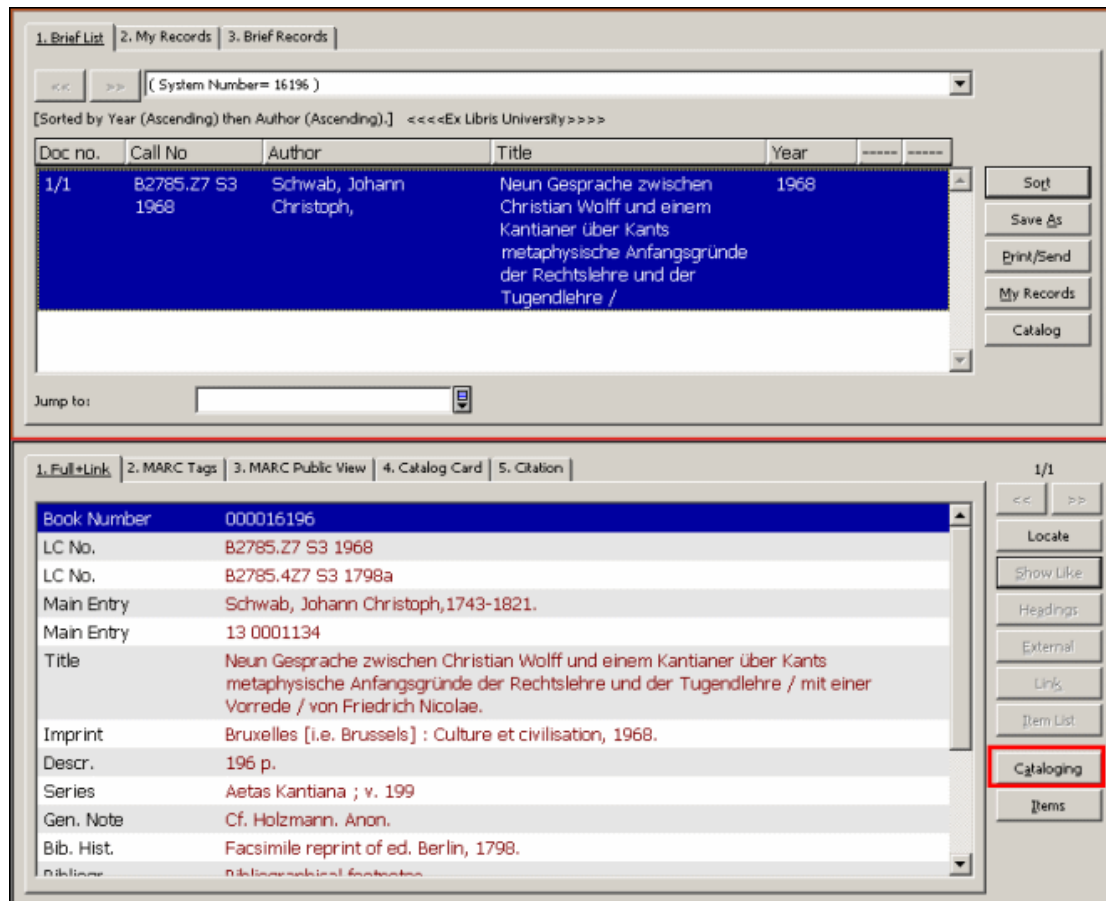


- A copy of the record is made on your local drive and is displayed in the Catalog Editor (upper pane) for editing (see Editing Records on page 28).
- The record is given a temporary, local filename that begins with the prefix "NEW" and a number.

7.3 Push from the Search Tab

You can transfer a record from the Search tab of the Cataloging module to the Cataloging tab in order to re-edit the record.

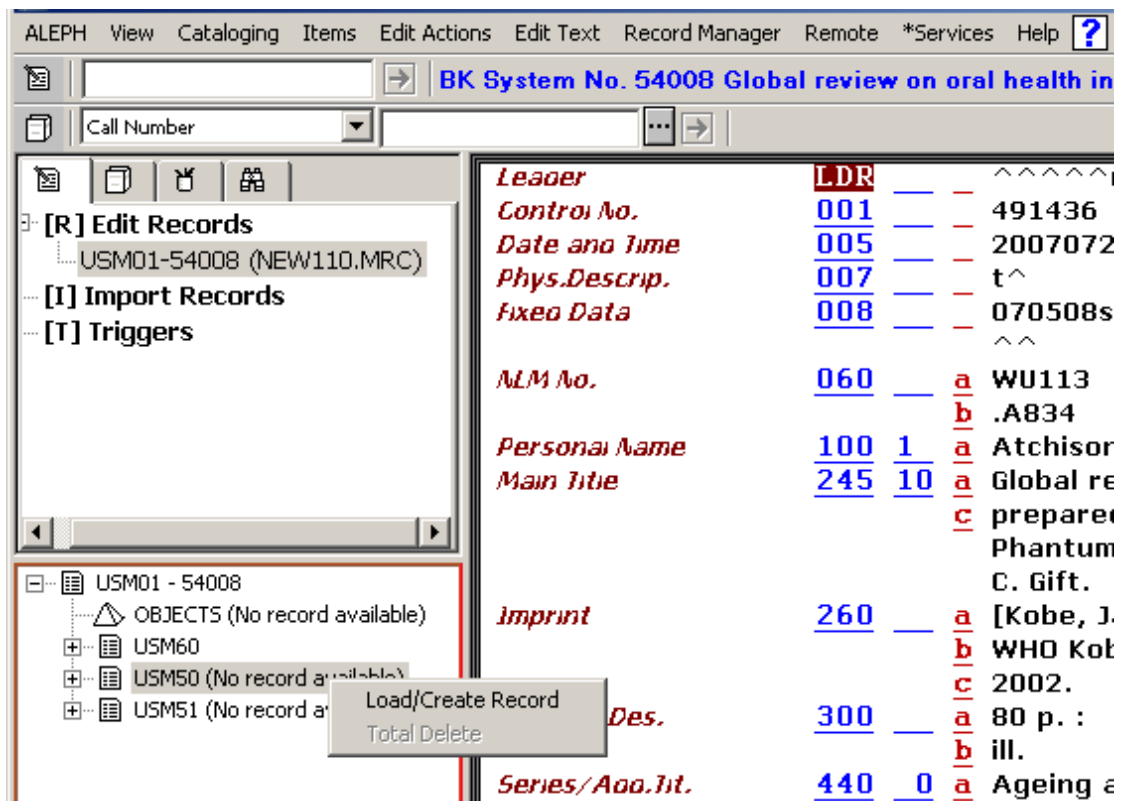
To do so, from the Full display of the record, click **Cataloging**. The full display of the record is available in the lower pane of the Show subfunction of the Search tab.



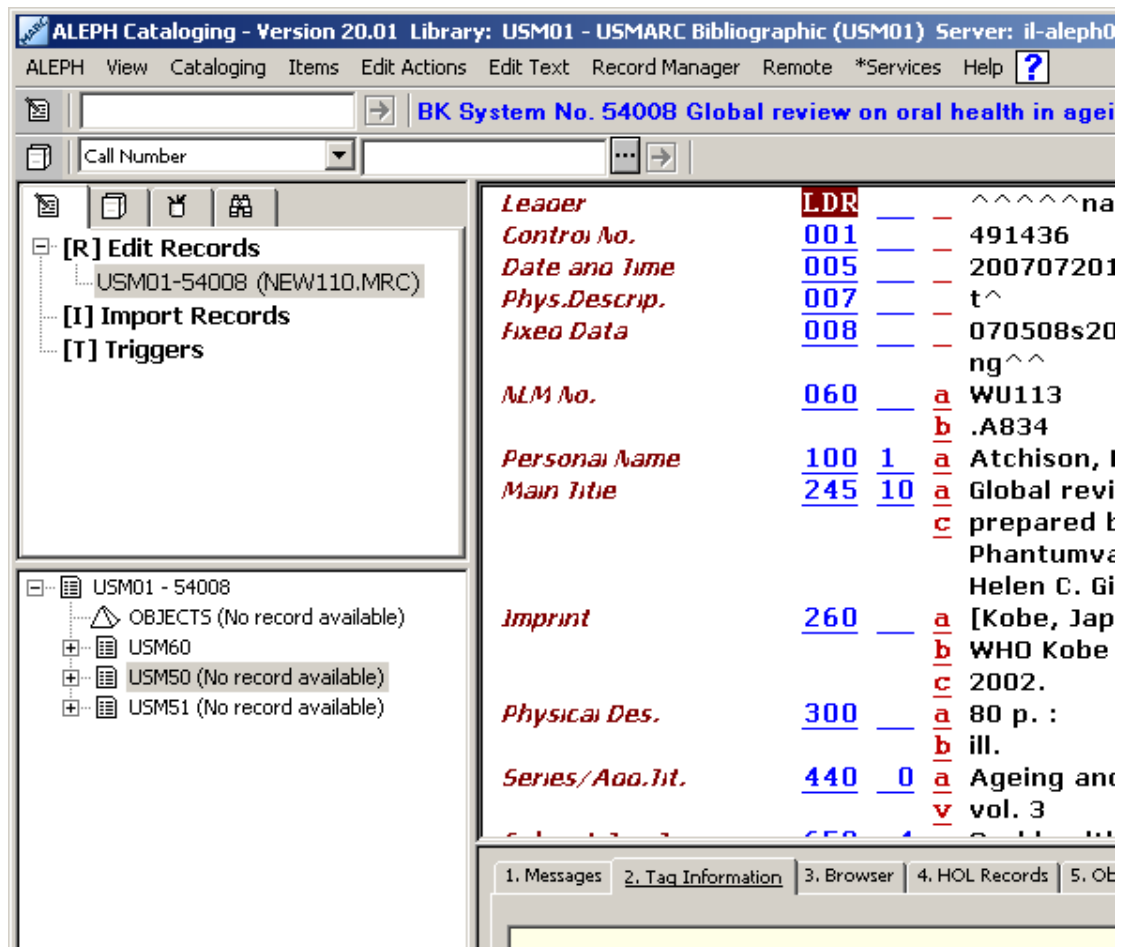
The selected record is transferred to the Cataloging tab and is displayed in the Catalog Editor (upper pane) for further editing.

7.4 Load ADM Record from Server

To retrieve the administrative record linked to the current bibliographic record, highlight the administrative library node from the Record Manager pane (lower section of the left pane) and choose the Load/Create Record option from the Record Manager menu or select the same option when right-clicking on the desired node. The associated ADM record is displayed in the Catalog Editor (upper pane):



If no administrative record is linked to the bibliographic record, the message *No record available* is displayed in the administrative node (beside the library code). You can highlight the administrative library node and select the Load/Create Record option to create a new administrative - ADM - record automatically:



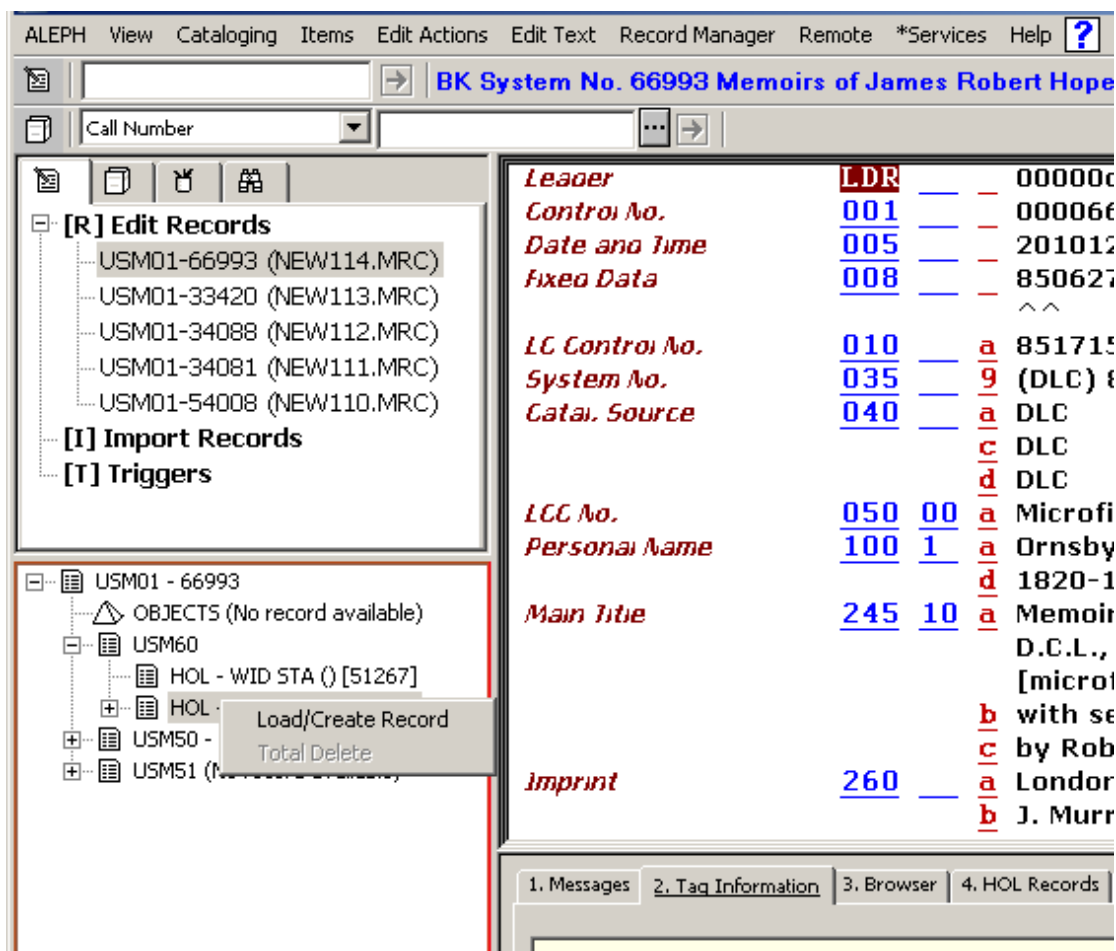
7.5 Load HOL Record from Server

There are two different ways to retrieve a holdings record attached to the current bibliographic record:

- Through the Record Manager
- Through the HOL Records tab of the lower pane

7.5.1 Load HOL Through the Record Manager

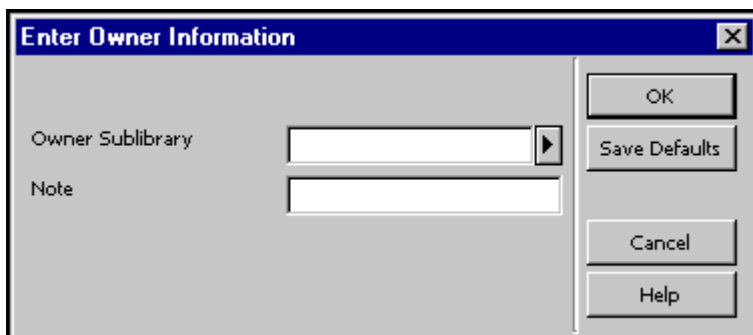
To retrieve a holdings record through the Record Manager, highlight the desired record (leaf) under the holdings node and choose the Load/Create Record option from the Record Manager menu or select the same option when right-clicking on the desired leaf. The associated holdings record is displayed in the Catalog Editor (upper pane):



The record is displayed in the Catalog Editor (upper pane) for further editing.

You can add new holdings records by highlighting the holdings library node and selecting the Load/Create Record option. The new record is created automatically and displayed in the Catalog Editor for further editing.

If the Activate flag of the [HoOwnTextDefaults] section of the catalog.ini file is set to Y, when holdings records are created the Enter Owner Information window is displayed.



This window enables you to define the owner of the holdings record, that is, the sublibrary to which the record belongs. In addition, you can add a note. When you are

finished filling in the form, click **OK**. The information is automatically stored in the OWN field of the holdings record in the following format:

OWN \$\$a[sublibrary code]

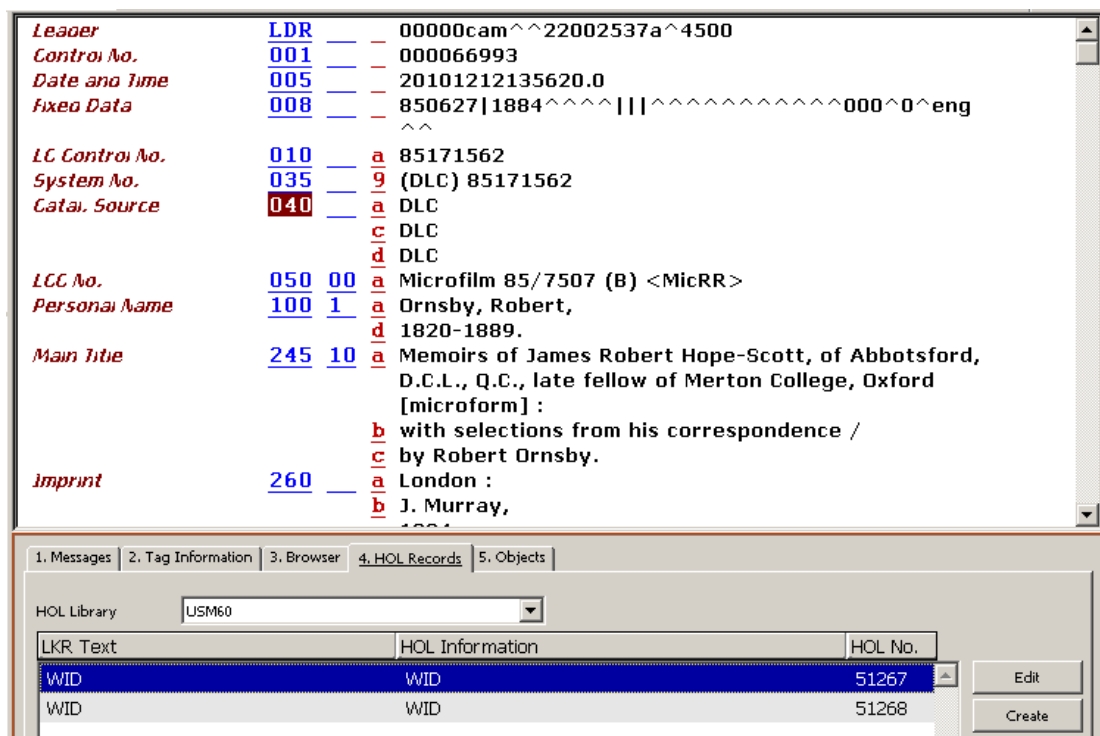
\$\$n[note]

The Save Default button can be used to save the information about the owner and apply it to each new holdings record that is created. To save the owner information, click the Save Defaults button before clicking **OK**.

Refer to "OWN" Field on page 99 for more details on the OWN field.

7.5.2 Load HOL Through the HOL Records Tab

To retrieve a holdings record through the HOL Records tab, select the HOL Records tab from the lower pane or choose the Select HOL Record option from the Edit Actions menu that automatically displays the HOL Records tab:



The HOL Records tab lists the holdings records linked to the record displayed in the Catalog Editor. This tab also enables you to access a selected record for editing and to create new holdings records.

To load a holdings record, highlight the selected record from the list and click **Edit**. The record is loaded and displayed in the Catalog Editor for you to edit. To create a new holdings record, click **Create**. The new record is automatically created. Note that as stated above, if the Activate flag of the [HolOwnTextDefaults] section of the catalog.ini file is set to Y, when holdings records are created, the Enter

Owner Information window is displayed. Refer to the above section for more details on this option.

To edit the new record, click **Edit**.

8 Locking Records

This chapter includes the following sections:

- Impact on Other Uses
- Unlocking Records
- Automatic Unlocking

The system does not allow a cataloger to save a record to the server if another cataloger has retrieved and saved it before the first cataloger.

In addition to this automatic security, you can lock a record so that only your changes can be saved on the server until you unlock the record. No one else can save this edited version on the server. Note that you can only lock a record that has a system number assigned to it.

To lock the current record, choose the Lock Record option from the Cataloging menu. The record will be locked and the phrase "Locked by current user" is displayed in the Cataloging bar. You can immediately continue editing the record:

The screenshot shows the ALEPH cataloging interface. The title bar reads "ALEPH View Cataloging Items Edit RecordManager Remote Services Help ?". The main window title is "[Locked by current user] System No. 32206 - Format BK - Applied eugenics. (I)".

On the left, a tree view shows the following options:

- [R] Edit Records
 - USM01-32206 (NEW192.MRC)
- [I] Import Records
- [T] Triggers

Below the tree view, a list of records is shown:

- USM01 - 32206
- USM60
- USM50 - 53502
- USM51 (No record available)

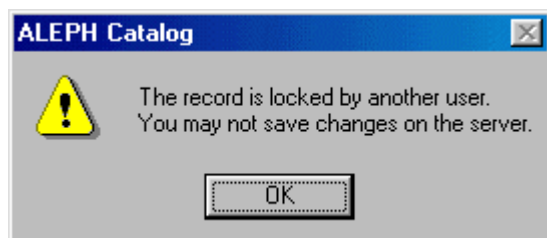
The main area displays the record details for System No. 035:

<i>System No.</i>	035	—	a	(CaOTULAS)02137118
<i>Catal. Source</i>	040	—	a	OTU
			b	ENG
<i>Local Call No.</i>	090	—	a	HQ751
			b	.P811a 1933
<i>Personal Name</i>	100	1	a	Popence, Paul Bowman,
			d	1888-
<i>Main Title</i>	245	10	a	Applied eugenics.
<i>Edition</i>	250	—	a	[Rev. ed.]
<i>Imprint</i>	260	—	a	New York, :
			b	Macmillan,
			c	1933.
<i>Physical Des.</i>	300	—	a	ix, 429 p.
<i>Series/Adj. Tit.</i>	440	0	a	Social science text-books
<i>Subject-Top. Term</i>	650	0	a	Eugenics
<i>A.E. Pers. Name</i>	700	1	a	Johnson, Roswell Hill,
			d	1877-,
			e	jt. author

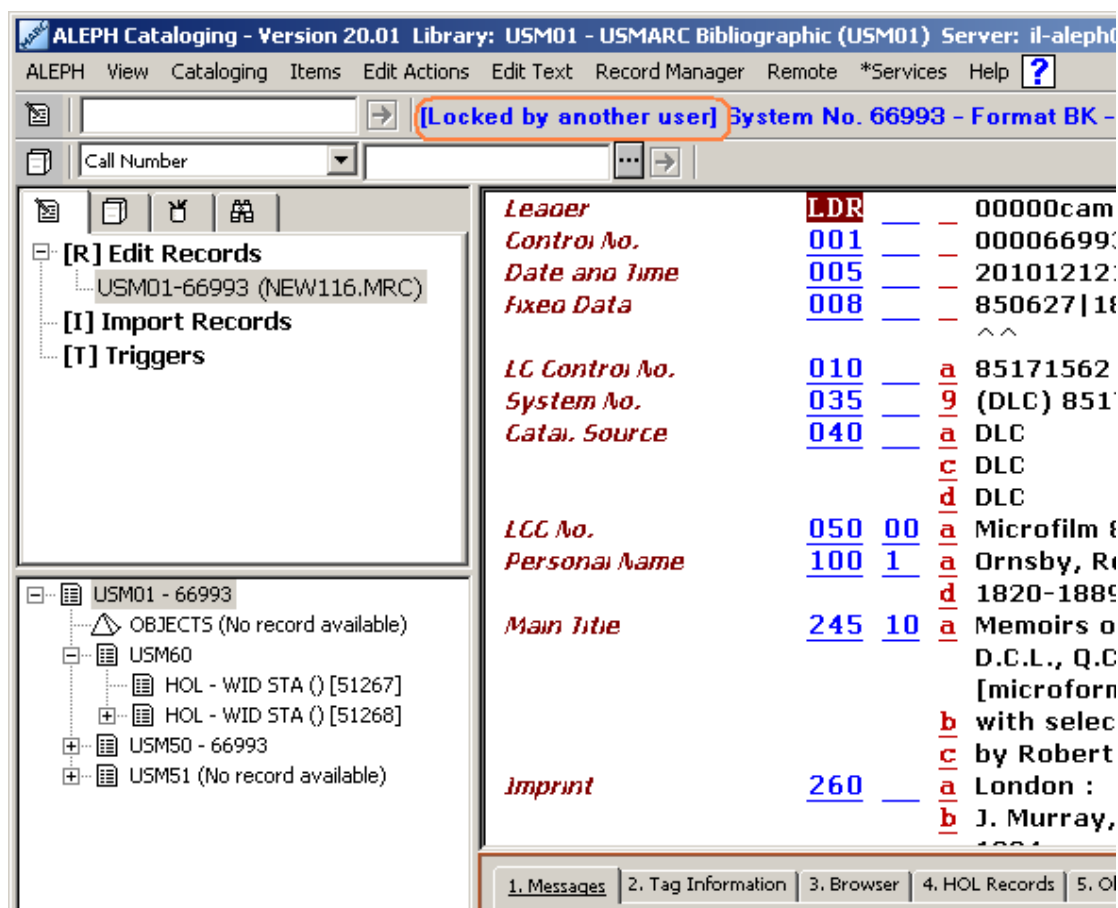
At the bottom, there are tabs for "1. Messages", "2. Tag Information", "3. Browser", and "4. HOL Records".

8.1 Impact on Other Users

Note that when you lock a record, someone else may call up the record from the server. When a cataloger loads a locked record from the server, a warning message will be displayed.



He may read the record, and even edit it, but he will not be able to save any changes on the server while the record is locked. In addition to the warning message displayed when the record is first called up, the phrase *Locked by another user* is displayed in the Cataloging bar:



8.2 Unlocking Records

To unlock a record that you have previously locked, choose the Unlock Record from the Cataloging menu. The record will be unlocked and the message in the Cataloging bar informing you that it was locked disappears.

If you save changes on the server and then unlock the record, the other cataloger will not be able to save his changes on the server. (This is due to the design of the system, that ensures that if you update a record while someone else is holding it, his changes will not be saved). If, however, you unlock the record without saving any changes on the server, the other user may then save his changes on the server.

8.3 Automatic Unlocking

Locked records are automatically unlocked after a period defined by your system librarian. When the cataloger activates any functions that involve the server (such as Save on Server, Fix, Sort or Check), the record will be locked for an additional period. For example, if the locking period is one hour and the user activates the Fix function after 20 minutes, the record will be locked for a total of 1 hour and 20 minutes.

9 Deleting Records

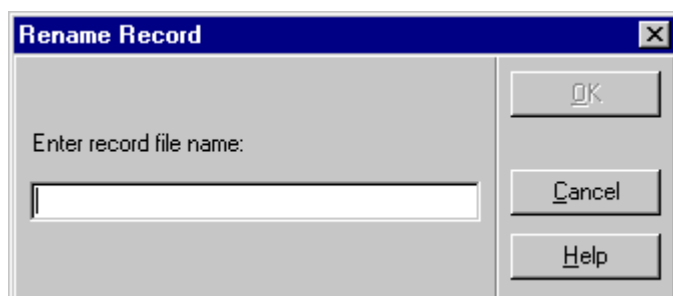
There are four options for deleting records:

- Delete New* Records from Local Drive
- Delete Record from Local Drive
- Delete Record from Server
- Total Delete

9.1 Delete New* Records from Local Drive

This function deletes all records whose filenames begin with the prefix "New...." from your local drive.

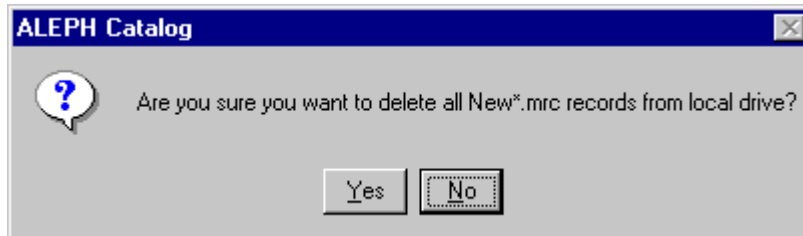
If there is a "New..." file that you do not want to delete, first call up the record from your local drive and rename it by choosing the Rename on Local Drive option from the Cataloging menu. A pop-up dialog box will be displayed for you to fill in the new name for the record.



Enter the new file name and click **OK**. The record will be saved on your local drive under the new name and will not be deleted by the Delete New* records function.

You may now delete the New* records from your local driver. To do this, follow these steps:

1. Choose the Delete New* Records option from the Cataloging menu. You will receive a prompt asking if you are sure you want to delete.



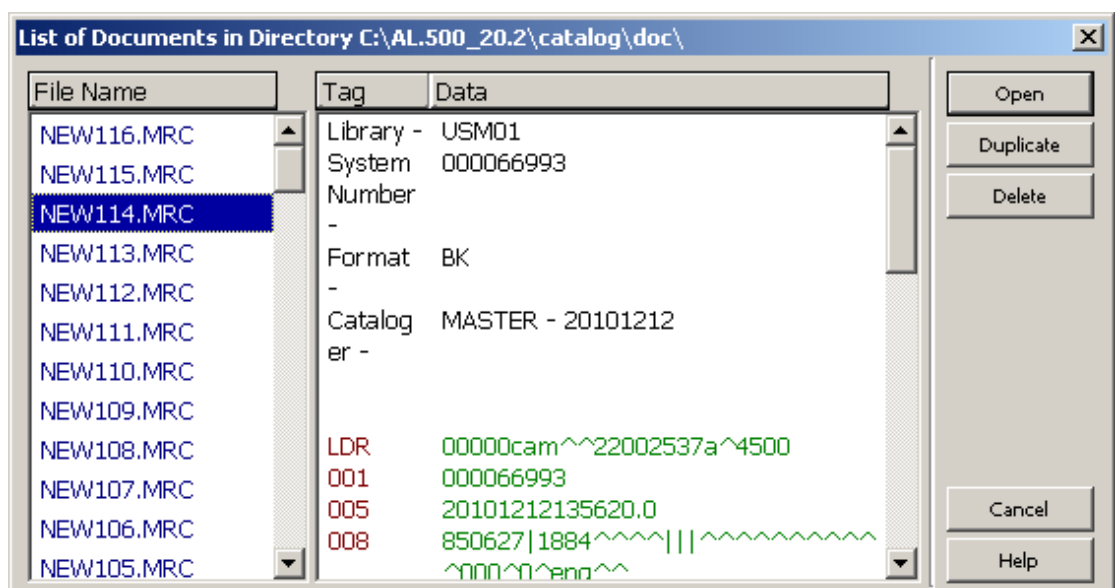
2. Click **Yes**. All "New..." records will then be deleted without a further message.

New records can be deleted automatically by the system by setting the interval (in days) for records that have not been updated/created to be deleted. The interval can be set through the DeleteTempDocumentsInterval variable of the catalog.ini file of the catalog/tab directory.

9.2 Delete Record from Local Drive

To delete a record from your local drive, follow these steps:

1. Select the Open Record on Local Drive option from the Cataloging menu. This option opens the dialog box that lists all local records.




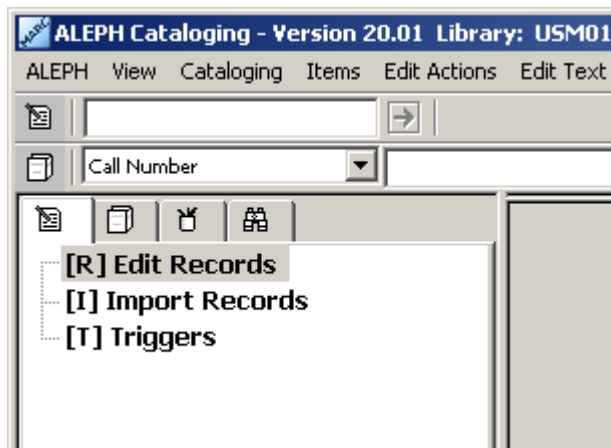
2. Highlight the desired record and click **Delete**. You will receive a prompt asking if you are sure you want to delete the record. If you want to delete the record, click **Yes**.

The selected record will be deleted without any further messages.

9.3 Delete Record from Server

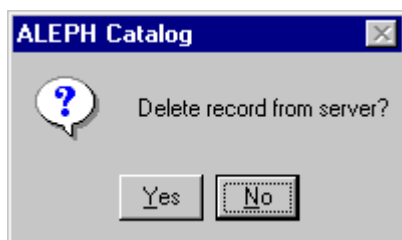
To delete a record from the server, follow these steps:

1. Enter the system number of the record to be deleted in the System Number field of the Cataloging bar and click the arrow .



Skip this step if the record you wish to delete is the one currently being displayed.

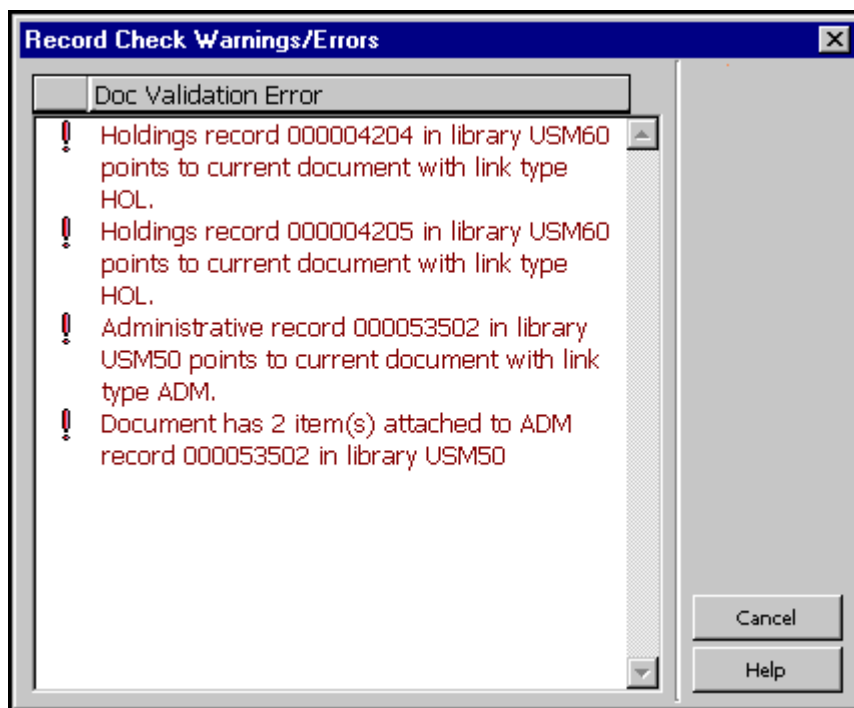
2. From the Edit Text menu, choose the Delete submenu and select the Delete Record From Server option. You will receive a prompt asking if you are sure you want to delete:



3. Click **Yes**. The record will not actually be deleted, but all fields except the LDR field will be removed. In addition, all links from the record to the OPAC/Search indexes will also be removed.

- Note that some sites need to inform utilities with which they are associated that bibliographic records have been deleted from their catalog. They do this by sending the record with a deleted status (in the leader) to the utility. Therefore, the Delete Record from Server cannot be used since all the fields except the leader are deleted. For this site, it is possible to add an STA \$\$aDELETED field that indicates that the record is "deleted" without deleting all the fields in the record. In spite of the fact that the indexable fields remain in the record, index entries for them are removed to prevent the display of these records from the Web OPAC and Search function.

You can set up the system so that when you try to delete a record, the system will check if there are any links from the record to another record, or if there are any associated items, subscriptions, or orders. Upon completion of the check, if there are any links, you will receive a message listing them and you will be unable to delete the record.



In this case, click **Cancel**. The Record Check/Warnings Errors window is closed and the list of associated records is displayed in the Messages tab of the lower pane.

<i>Personal Name</i>	100	1	a	Popence, Paul Bowman,
			d	1888-
<i>Main Title</i>	245	10	a	Applied eugenics.
<i>Edition</i>	250		a	[Rev. ed.]
<i>Imprint</i>	260		a	New York, :
			b	Macmillan,
			c	1933.
<i>Physical Des.</i>	300		a	ix, 429 p.
<i>Series/Adj.Tit.</i>	440	0	a	Social science text-books
<i>Subject-Top.Trm</i>	650	0	a	Eugenics
<i>A.E. Pers. Name</i>	700	1	a	Johnson, Roswell Hill,
			d	1877-
			e	jt. author

1. Messages | 2. Tag Information | 3. Browser | 4. HOL Records

Doc Validation Error

- Holdings record 000004204 in library USM50 points to current document with link type HOL.
- Holdings record 000004205 in library USM50 points to current document with link type HOL.
- Administrative record 000053502 in library USM50 points to current document with link type ADM.
- Document has 2 item(s) attached to ADM record 000053502 in library USM50

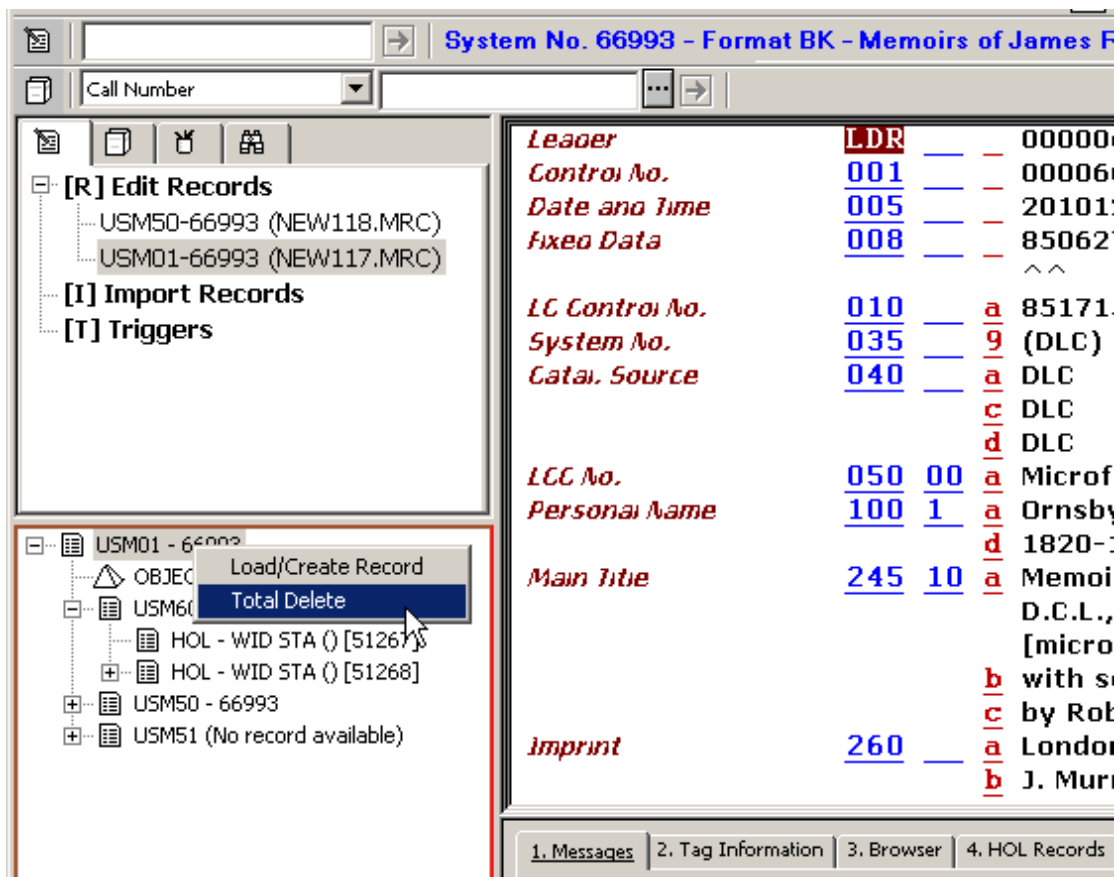
View Related

For linked holdings and administrative records, you can use the View Related button to retrieve the selected record.

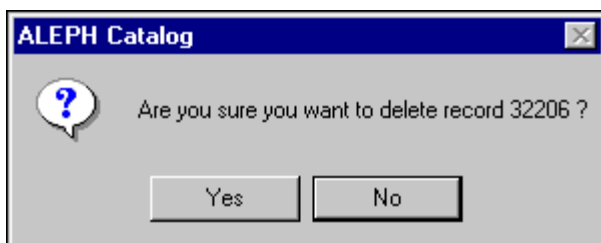
Additionally, you can set up the system so that when you try to delete an authority record, the system checks if there are any bibliographic records linked to the heading of the authority record to be deleted. Upon completion of the check, if there are any bibliographic records linked to the heading, you receive a message listing up to three bibliographic records attached; if more records are attached, you receive a message informing you that more bibliographic records are linked to the record.

9.4 Total Delete

You can delete Bibliographic records from the server through the Record Manager (lower section of the left pane) by selecting the Total Delete option from the Record Manager menu or by selecting the same option when right-clicking on the bibliographic node:



You receive a prompt asking if you are sure you want to delete the record:



Note that the Total Delete option deletes not only the bibliographic record but also deletes **all** associated records. Similar to the Delete from Server option, you can set up the system so that, when you try to delete a record using this method, the system checks if there are any links from the record to another record, or if there are any associated items, subscriptions, or orders. Upon completion of the check, if there are any links, you receive a message listing them and - depending on the setup - you will be unable to delete the record.

Whenever a record is totally deleted, whether it is done via the GUI or during a batch process or by any other program, the following rules apply:

- The following record fields are always retained: LDR, DEL, FMT, SYS, 005 and CAT.
- The SID field is retained if the value of the tab100 variable UNION-LIBRARY is other than 0.

- A DEL field is added to the record with a single subfield *a*, whose value is *Y*.
- Section DEL of `tab_fix` is run on the record.

10 Special Fields

This section covers special fields and ALEPH-specific fields:

- External link - Field 856
- LKR Field
- "OWN" Field
- 852 - Location Field
- 853 and 853X - Publication Schedule
- Z30 Item's Permanent Location
- STA Status

10.1 External Link - Field 856

The 856 field contains the information needed to locate and access an electronic resource relevant to the record. The external link can be to any machine that is served by an HTTP daemon.

Following is the list of subfields that are used by ALEPH to create the link:

Subfield	Description
a	Host name (the IP address for files that are NOT in the local PC directory system. For example: www.scj.albany.edu)
d	Path or directory (contains the path, the series of logical directory and subdirectory names where the file is stored). Note that when adding a link to a file, the path must include the string 'file:\\' at the beginning.
f	Filename (contains the name of the file as it exists in the directory/subdirectory indicated in subfield \$d).
p	Port number (to be used with the host name for files that are NOT in the local PC directory system). If no port is specified, the default is 80.
u	Uniform Resource Identifier (contains the URI). If subfield \$u is present, it overrides the information stored in subfields \$a, \$d, \$f, \$p.

Note that if needed, both the field and/or subfield \$u can be repeated.

Special ALEPH subfields in the 856 field are:

Subfield	Description
----------	-------------

4	<p>A copyright message is displayed when executing the 856 external link through the Web OPAC. If subfield \$4 is added to the field, the message is not displayed.</p> <p>Note that if the show_copyrights flag in the www_server.conf file is set to N, then the copyrights message is not displayed, even if the records do not contain subfield \$4.</p>
9	<p>Code for type of program (for example, "htm" for HTML files; "doc" for Word files). This subfield is needed for display from the Search module. Assigns "HTM" by default if the subfield is not present.</p>

URLs can be defined in fields other than field 856. Subfield \$u (URI) can also be defined for the following fields:

In bibliographic records:

505 (Formatted Contents Note)
506 (Restrictions on Access Note)
514 (Data Quality Note)
520 (Summary, Etc.)
530 (Additional Physical Form Available Note)
540 (Terms Governing the Use and Reproduction Note)
545 (Biographical or Historical Data)
552 (Entity and Attribute Information Note)
555 (Cumulative Index/Finding Aids Note)
563 (Binding Information)
583 (Action Note)

In authority records:

670 (Source Data Found)
678 (Biographical or historical data)

Define Application

In addition, you must define the application to be invoked for running the program or displaying the file. For the Search function (tab), this is done in the ALEPHCOM.INI file, which is located in the ALEPHCOM/TAB directory. The relevant section in the ALEPHCOM.INI file is called [External].

10.2 LKR field

The ALEPH system holds information in different types of records and different types of "libraries" (databases). For example, a standard system has a bibliographic database for storing bibliographic data, and an administrative database for storing administrative data.

The total picture of a record is dependent on the links between the other records in the system. The LKR field is an ALEPH field used to create these links.

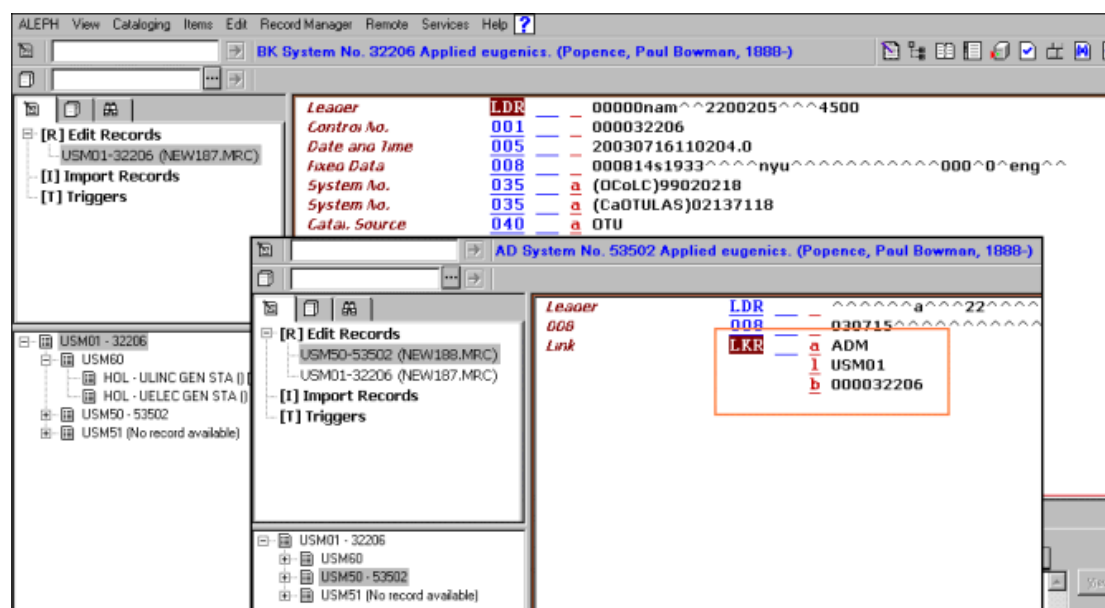
Links in ALEPH can either be system-generated (for example, links of copies to a bibliographic record), or user-generated (for example, links between two

bibliographic records and/or a bibliographic record and items that belong to another bibliographic record).

System-generated Links

When creating a holdings or an administrative record for the bibliographic record in the Catalog Editor, the new record automatically includes the LKR field.

The following is an example of an LKR field for an administrative record. Note that subfield \$a of the LKR field (administrative record) is set to ADM and subfield \$b contains the system number of the bibliographic record.



Subfield \$a of the LKR field of holdings records is set to HOL.

User-generated Links

You can use the LKR field to create links from one bibliographic record to another, for example, for analytical purposes, for changed titles for serial publications, and so on. The available types of links and the values that must be entered to generate these links are shown in the table below. Note that the LKR field is only cataloged in one of the records; the system creates the other side of the link.

Subfield	Description	
a	Value	Use
	UP	An up link to another bibliographic record. A record can have only one link of this type. A DN link is automatically built in the opposite direction.
	DN	A down link to another bibliographic record. Multiple links are possible. An UP link is automatically built in the opposite direction.
	PAR	A parallel link from one bibliographic record to another. A PAR link is automatically built in the opposite direction.

	ANA	The ANA link creates both ITM and UP-DN type links. In other words, it creates a link between the two bibliographic records and to the item/s. * Note that subfield \$b for this type of link contains the system number of the bibliographic record to which the record is linked (unlike the ITM type link).
	ITM	The ITM link creates a link between one bibliographic record and the items of another bibliographic record. The item filter fields (\$y, \$v, \$p \$i, \$d, \$e, \$f, \$g, \$h, \$j, \$w, \$o and \$q must be used for this type of link. *Note that subfield \$b for this type of link contains the ADM system number.
b	System number of the linked record (the target record)	
i	Issue link	
k	Pages	
l	Library where target record is located	
m	Down link note	
n	Up link note	
p	Part link	
r	MARC tag link	
s	Sort sequence; can be alphanumeric	
v	Volume link	
y	Year link	
d	Fourth level of enumeration *Note that this filter is applicable only when update_z103_lkr_extended program is used in tab_z103 table, and Z103X is defined.	
e	Fifth level of enumeration *Note that this filter is applicable only when update_z103_lkr_extended program is used in tab_z103 table, and Z103X is defined.	
f	Sixth level of enumeration *Note that this filter is applicable only when update_z103_lkr_extended program is used in tab_z103 table, and Z103X is defined.	
g	Alternative Volume link *Note that this filter is applicable only when update_z103_lkr_extended program is used in tab_z103 table, and Z103X is defined.	

h	<p>Alternative Issue link</p> <p>*Note that this filter is applicable only when update_z103_lkr_extended program is used in tab_z103 table, and Z10X is defined.</p>
j	<p>Second level of chronology</p> <p>*Note that this filter is applicable only when update_z103_lkr_extended program is used in tab_z103 table, and Z103X is defined.</p>
w	<p>Third level of chronology</p> <p>*Note that this filter is applicable only when update_z103_lkr_extended program is used in tab_z103 table, and Z103X is defined.</p>
o	<p>Fourth level of chronology</p> <p>*Note that this filter is applicable only when update_z103_lkr_extended program is used in tab_z103 table, and Z103X is defined.</p>
q	<p>Alternative chronology</p> <p>*Note that this filter is applicable only when update_z103_lkr_extended program is used in tab_z103 table, and Z103X is defined.</p>

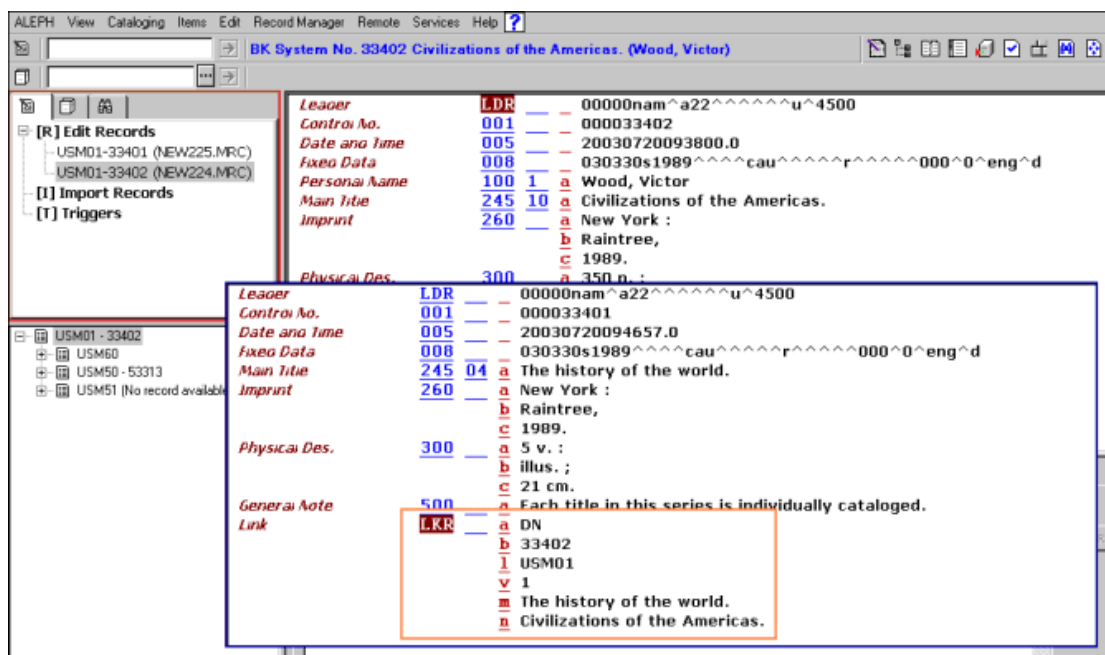
Up and Down Links

The DN (down) link creates a down link from the record that has the LKR field to the record to which it is linked. An UP (up) link is created automatically from the linked record back to the record with the LKR field.

The UP (up) link creates an up link from the record that has the LKR field to the record to which it is linked. A DN (down) link is created automatically from the linked record back to the record with the LKR field.

Note that it is standard to catalog LKRs of type DN to create the UP-DN relationship and not the opposite (in other words, LKR of type UP).

The following is an example of a DN link:



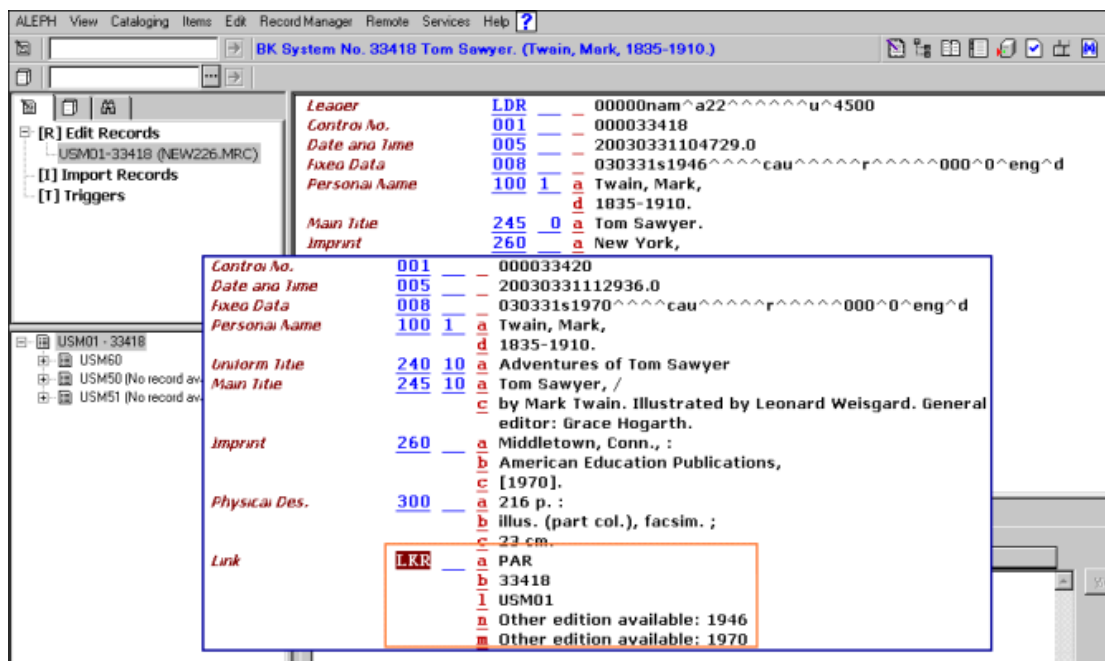
The LKR field enables access from one record to the other. The following is the Web OPAC display of the cataloging records shown above:



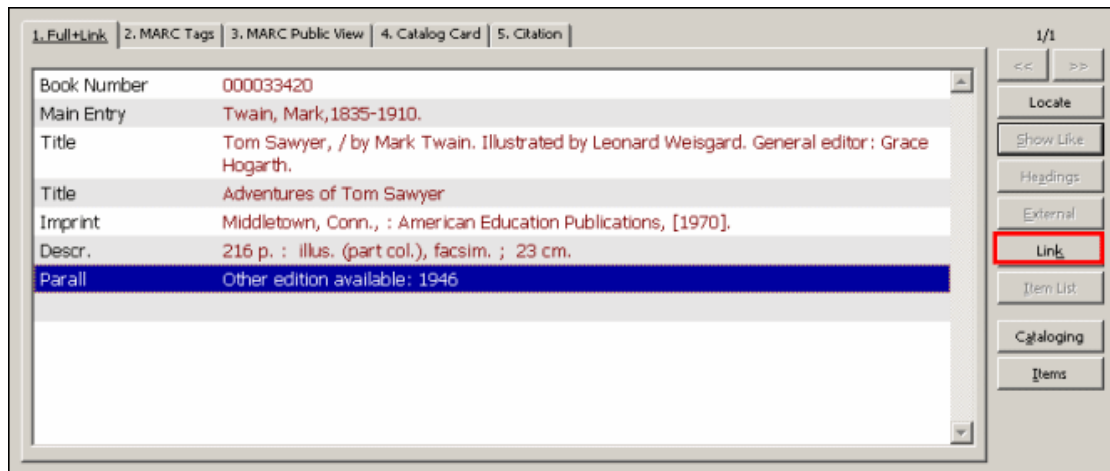
Parallel Links

The PAR (parallel) link creates a parallel link from one record to another.

The following is an example of a PAR link:



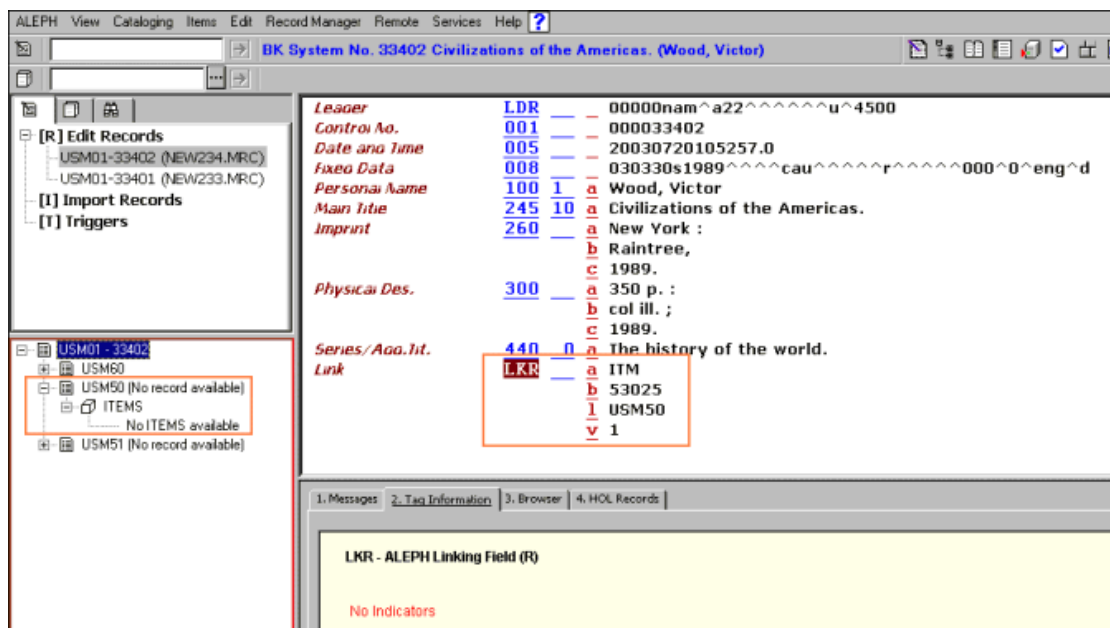
The records above are displayed in the Search function as follows:



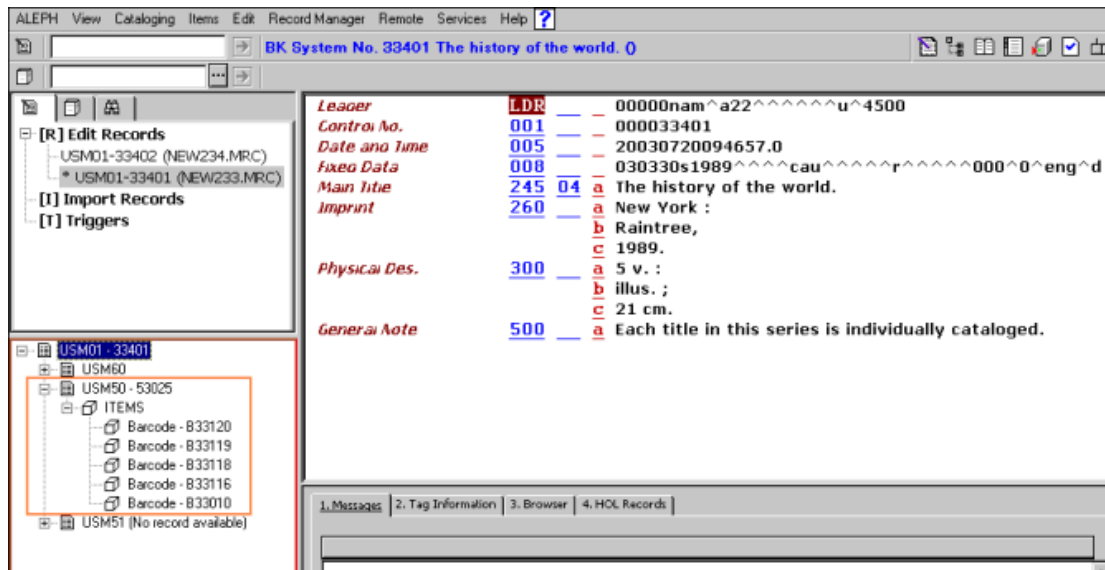
ITM Links

The ITM link creates a link between a bibliographic record and the items of another bibliographic record.

The following is an example of an ITM link. In this example, *Civilizations of the Americas* is the first volume of the series *The History of the World*. The items for all volumes are managed under the record for *The History of the World*.



In the above example, you can see via the Record Manager that the record does not have any attached items. In addition, note that subfield \$b contains the system number of the administrative record attached to the bibliographic record for *The History of the World* and subfield \$v (volume) is used as an item filter. In other words, as shown below, the record *The History of the World* has five items attached but only Volume 1 is linked to the record for *Civilizations of the Americas*.



In the Web OPAC, *Civilizations of the Americas* is displayed as follows:

Full View of Record

Choose format: [Standard format](#) [Catalog card](#) [Citation](#) [Name tags](#) [MARC tags](#)

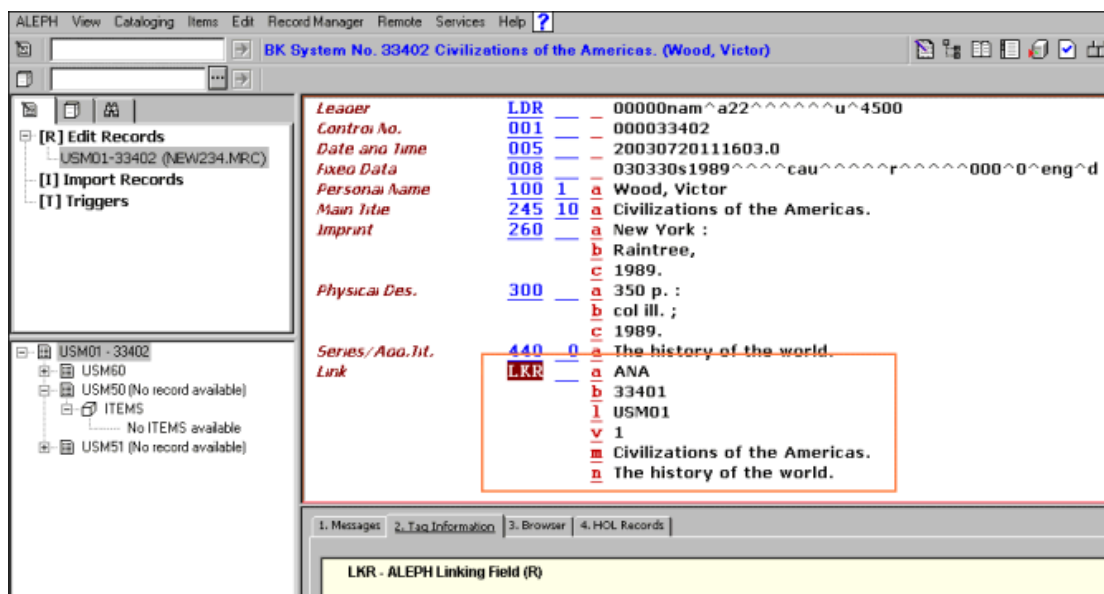
Record 000001 out of 1

Book Number	000033402
Record Format	Monograph
Main Entry	● Wood, Victor
Title	● Civilizations of the Americas.
Imprint	New York : Raintree, 1989.
Descr.	350 p. : col ill. ; 1989.
Series	● The history of the world.
Holdings	All items

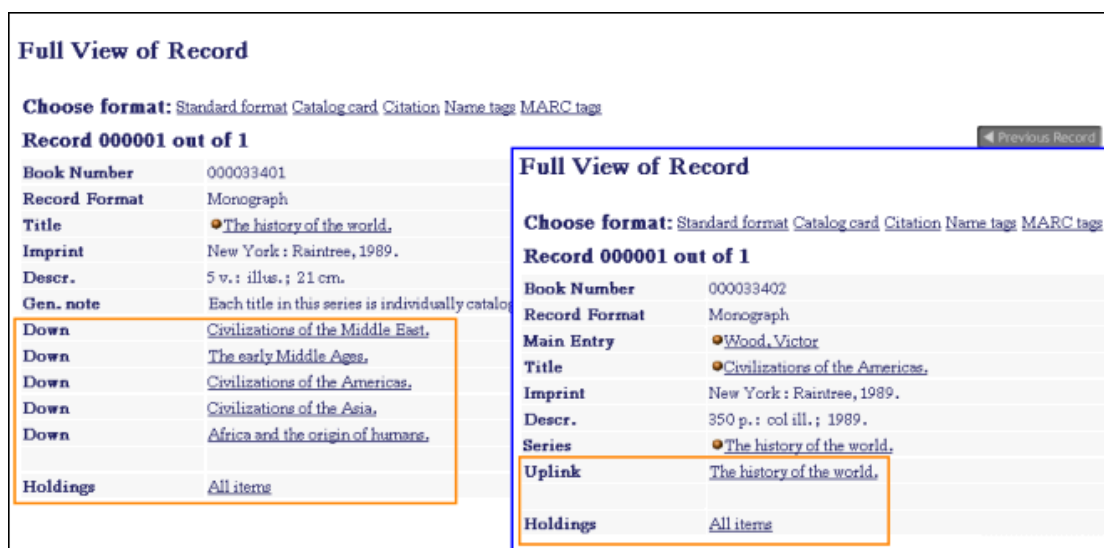
Analytic Links

The ANA (analytic) link creates a link between two bibliographic records and the items of one of the records. This type of link creates both ITM and UP-DN links.

The following is an example of an ITM link. In this example, *Civilizations of the Americas* is the first volume of the series *The History of the World*. The items for all volumes are managed under the record for *The History of the World*.



In the above example, you can see via the Record Manager that the record does not have items attached. In addition, note that subfield \$b contains the system number of the bibliographic record for *The History of the World* and subfield \$v (volume) is used as an item filter. Following is the Web OPAC display for *The History of the World* and for *Civilizations of the Americas*.



Note that values entered in subfield \$a must be in uppercase.

It is possible to set up the system to check the validity of the library and document number in the LKR field. To do this, the System Librarian must include the "check_doc_lkr" program in the standard check routines setup.

10.3 "OWN" Field

The OWN field is a special ALEPH field that can be used in different ways:

- It can be used to control update access to all types of MARC records.
- It can be used in holdings records to define the "owner" of the record.
- It can be used as a filter for displaying Holdings records in the record manager and in the *HOL records* tab in the screen's lower pane.

10.3.1 OWN - Access Control Usage

The OWN field can be used to control update access to all types of MARC records (BIB, HOL, ADM, AUT). The user is checked for access/update permission according to the contents of the record's OWN field(s).

Select the Cat. Own ID from the list, by clicking the arrow to the right of the field.

Access permission is defined through the Privileges function by assigning the cataloger the following:

1. A default value for the OWN field of new records created by the cataloger (Cat. OWN ID)
2. A default value that will be checked against the OWN field(s) of the records accessed by the cataloger for update authorization (Cat. OWN Permission). The following is an example of the OWN values assigned to the cataloger Gary:

User Password Information	
User Name:	GARY
User Library:	USM50
Password:	
Cataloger Level:	06
Function Proxy:	
Cataloger Proxy:	
Budget Proxy:	
Order Unit/Sublibraries:	
Cat. OWN ID:	EDUC5
Cat. OWN Permission:	EDUC5
Circ. Override Level:	01

Cat. OWN ID

The Cat. OWN ID defines the default value for the OWN field of new records. The following is an example of a record cataloged by Gary:

<i>Leader</i>	LDR	—	—	00000cam^^2200337^a^4500
<i>Control No.</i>	001	—	—	12152408
<i>Date and Time</i>	005	—	—	20031109120439.0
<i>Fixed Data</i>	008	—	—	000823s1998^^^at^a^^^^^^^^^^^^00100^eng^^
<i>LC Control No.</i>	010	—	a	00341137
<i>ISBN</i>	020	—	a	0958584214
<i>Main Title</i>	245	00	a	Ad news, 1928-1998 :
			b	the legends of advertising.
<i>Imprint</i>	260	—	a	Surry Hills, N.S.W. :
			b	Yaffa Pub. Group,
			c	[1998].
<i>Physical Des.</i>	300	—	a	130 p. :
			b	ill. (some col.) ;
			c	35 cm.
<i>General Note</i>	500	—	a	Cover title.
<i>General Note</i>	500	—	a	Includes index.
<i>Subject-Top Term</i>	650	0	a	Advertising
			z	Australia
			x	History
<i>Owner</i>	OWN	—	a	EDUC5

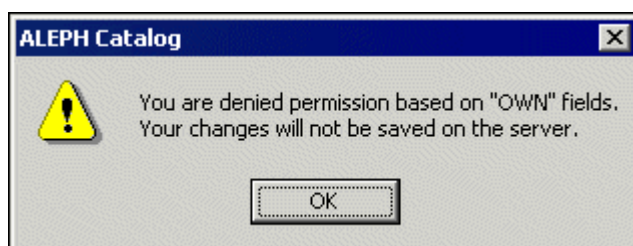
The OWN field is automatically added to the record by a fix program (fix_doc_own_1).

Cat. OWN Permission

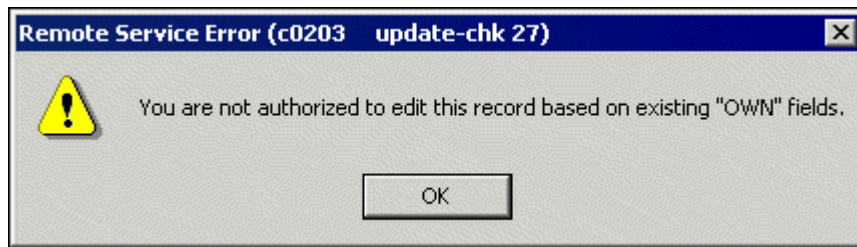
The Cat. OWN Permission is the cataloger's value checked against the OWN field(s) of the record accessed by the user.

Authorization to update a record is given when the Cat. OWN Permission of the cataloger is equal to any of the OWN fields of the record.

When a user who is not allowed to update a record retrieves the record from the server, the following is displayed:



When a user who is not allowed to update a record tries to update the record, the following is displayed:



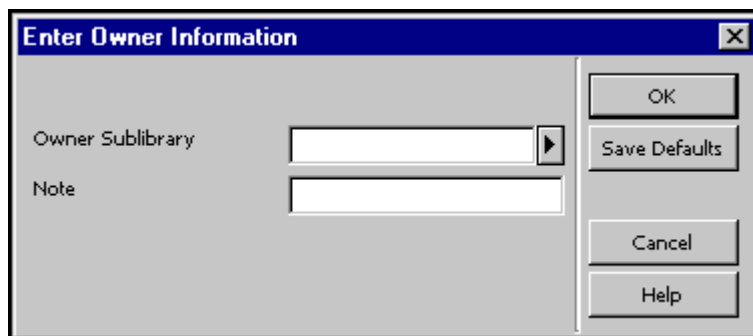
If a catalog proxy is assigned to the user, then the OWN values for the user are taken from the proxy's record.

Note that the system librarian can assign a group of allowed OWN values for a cataloger (see Cataloging "OWN" Permissions).

10.3.2 OWN - Holdings "owner"

The OWN field can be used in holdings records to define the "owner" of the record, in other words, the library/sublibrary to which the record belongs.

If the Activate flag of the [HolOwnTextDefaults] section of the catalog.ini file is set to Y, when holdings records are created the Enter Owner Information window is displayed.



This window enables you to define the owner of the holdings record, that is, the sublibrary to which the record belongs. You can also add a note. When you have finished filling in the form, click **OK**. The information is automatically stored in the OWN field of the holdings record in the following format:

```
OWN  $$a[sublibrary code]
     $$n[note]
```

The **Save Default** button can be used to save the information about the owner and apply it to each new holdings record that is created. To save the owner information, click the Save Defaults button before clicking **OK**.

10.4 852 Location Field

The MARC 21 field 852 is defined to contain information in as much detail as is needed to locate an item.

A variable in tab100 of the administrative and holdings libraries (X852-ITEM-OVERRIDE) determines whether or not the holdings record is the master record for location information. If the variable is set to Y, the system will always override the location information (sublibrary, collection, call number and call number type) in the item using the location information from the holdings record (field 852). This will happen unless the item record is designated as having a temporary location.

The following information will be overridden:

- Item sublibrary by subfield \$b of the 852 field.
- Item collection by subfield \$c of the 852 field.
- Item call number type by the first indicator of 852 field.
- Item call number by subfields \$h, \$i, \$j, \$k, \$l, and \$m of the 852 field.
- Item copy number by subfield \$t if the subfield contains a copy number and not a range of numbers for copies.

In addition, when a holdings record is created based on data in an item or subscription record, the 852 field, subfields \$b (sublibrary) and \$c (collection) will be automatically generated. If the bibliographic record to which the holdings record is linked has call number information, then the system will also create subfields \$h (classification part) and \$i (item part).

If the variable CREATE-852-HOL in the tab100 table of the holdings library is set to Y when a holdings record is created, data from the bibliographic record is used as the default for the contents of the 852 (Location) field. The data is taken from one of the following MARC 21 fields of the bibliographic record, and preferences are set in descending order:

"099##"
"098##"
"090##"
"092##"
"096##"
"050##"
"055##"
"060##"
"070##"
"082##"
"086##"

- For "099##" OR "098##" OR "086##" subfield \$a is copied to subfield \$h of the new 852 field.
- For all other fields, subfield \$a is copied to subfield \$h, and subfield \$b is copied to subfield \$i.
- For "090##" and "050##" the first indicator is set to 0.

- For "092###" and "082###" the first indicator is set to 1.
- For "096###" and "060###" the first indicator is set to 2.
- For "099###" OR "098###" the first indicator is set to 8.
- For "055###" and "070###" the first indicator is set to 7.
- For "086###" if the first indicator of the field is 0, then the first indicator of the new 852 field is set to 3, otherwise the first indicator of the field is set to 8.

10.5 853/4/5 and 853x/854x/855x Publication Prediction

The 853/4/5 and 853X/854X/855X fields of the administrative or holdings record are used to define publication prediction and to create issues for serials. Refer to the Serials module in the ALEPH User Guide for an explanation of these fields.

10.6 Z30 Item's Permanent Location

When temporary changes are made to an item's information, the original information of the item is stored in the Z30 field of the administrative record (ADM). The data is automatically stored by the system in this field when the item's information is changed. The Z30 field is used by the system to restore the original information when the librarian uses the Restore Item Information function.

Following is the structure of the Z30 field of the administrative record:

```
$1 - Item sequence number
$2 - Sublibrary
$3 - Collection
$4 - Call number
$5 - Item status
$6 - Item process status
$7 - Second call number
$8 - Material type
$9 - Temporary location flag
```

10.7 STA Status

The STA field is an ALEPH field that contains information on the status of the record. For example, you could add an STA field to mark catalog records that are provisional by adding the following field:

```
STA $$aPROVISIONAL
```

This field can then be indexed and records with this status can be retrieved later on for further processing.

The STA status is a free-text field that can be user-defined to suit the needs of specific sites. However, there are two exceptions:

STA \$\$aDELETED
STA \$\$aSUPPRESSED

The STA \$\$aDELETED field can be added to records that are considered "deleted" records. When records are deleted using the Delete Record from Server option from the Cataloging modules, all fields in the record are deleted except the LDR field. The STA \$\$aDELETED field can be used to indicate that the record is "deleted" but without deleting all the fields in the record. In spite of the fact that the indexable fields remain in the record, index entries for them are removed to prevent the display of these records in the Web OPAC and in the Search function of the GUI.

The STA \$\$aSUPPRESSED field can be used to prevent the public from seeing the records to which the field is added. This field does not prevent index entries from being generated. To prevent the public from seeing these entries, it is necessary to explicitly exclude the STA \$\$aSUPPRESSED field through the standard logical bases mechanism.

Expand programs that, for example, expand holdings records into associated bibliographic records skip those holdings records in which the STA \$\$aSUPPRESSED field is present.

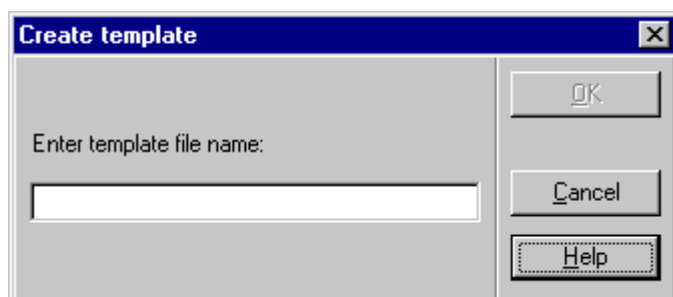
11 Creating Templates

New records can be created based on pre-defined templates. There are two types of templates:

- Local Templates
- Library Dependent Templates (saved on server)

11.1 Local Templates

Cataloging templates can be created based on the record currently displayed in the Catalog Editor (upper pane of the Edit Records function). To create them, choose the Create Template on Local Drive option from the Cataloging menu. A pop-up dialog box is displayed for you to fill in the name of the new template:



Click **OK**. You receive a message informing you that the template has been created. The template is saved in the list of templates (accessible through the Open Template option on the Cataloging menu. Note that the template is only available for the station from which it was created).

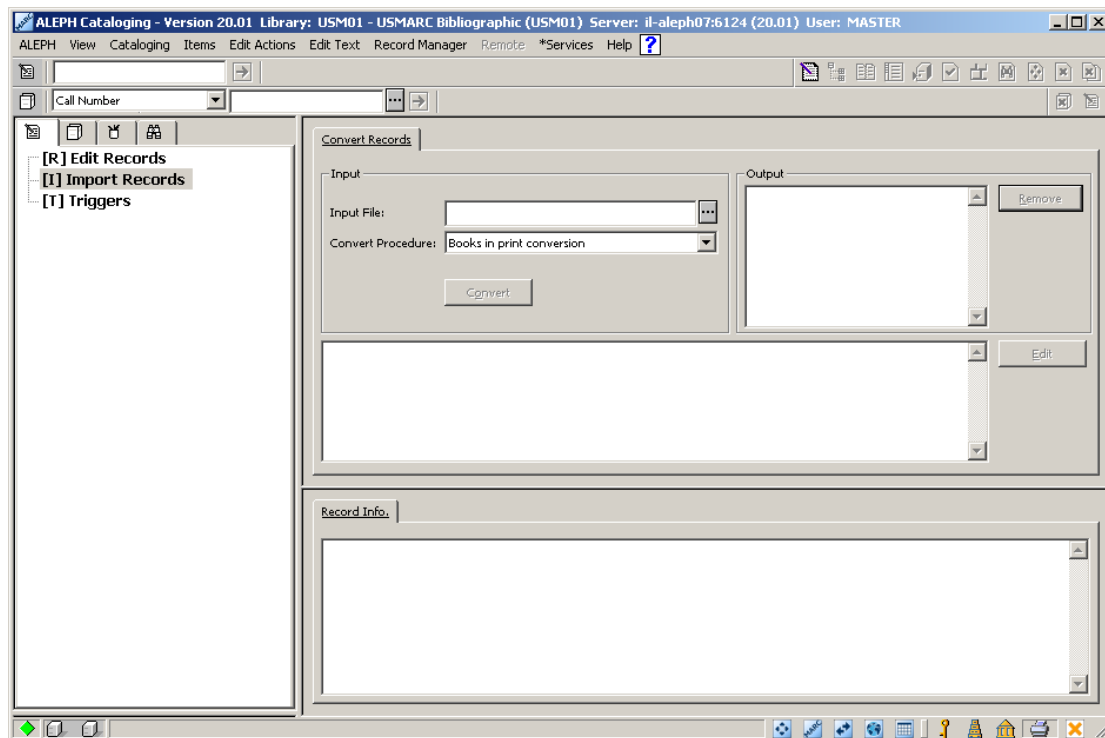
Local templates are stored in the Catalog/Templates directory on your PC. To remove a local template, search for the template under this directory and delete the file.

11.2 Library-dependent Templates (Saved on Server)

You can define library-specific templates. These templates are created by your system librarian and are saved in the library's cataloging directory. When you open a template on the Cataloging module, in addition to the local templates, templates from the home library to which you are connected will be listed in the List of Templates window. For example, if you are connected to a bibliographic library, only templates defined for this database will be shown in the List of Templates window. If you are connected to the authority database, only templates belonging to this library will be listed. All users connected to a library will be able to work with the templates defined for the library by your system librarian.

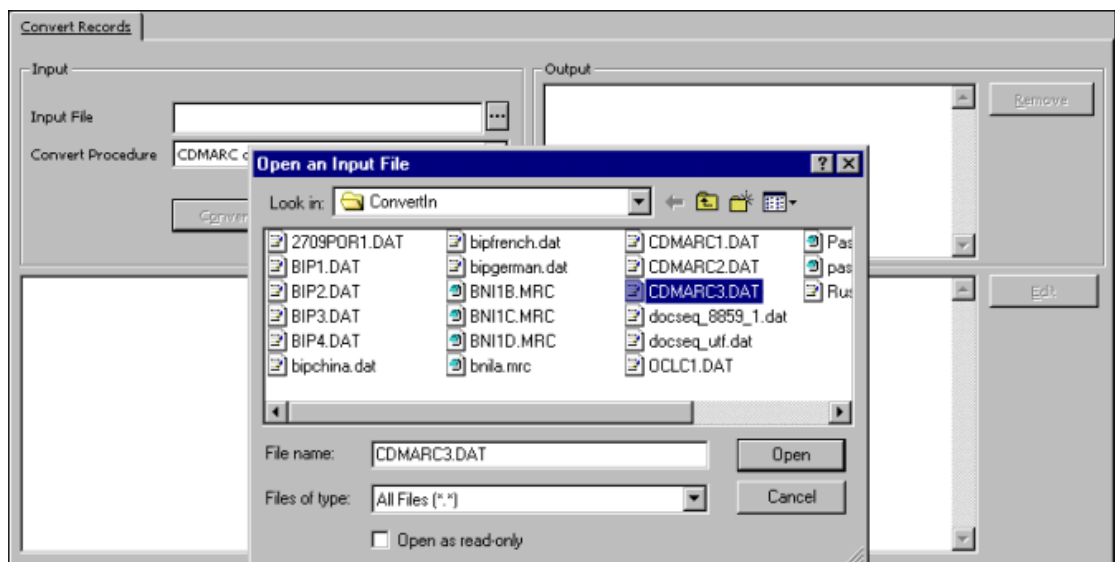
12 Importing Records

You can convert external records into ALEPH format and import them into your system. You do this using the Import Records subfunction. This option is accessed by selecting the Import Records node from the Cataloging tab:

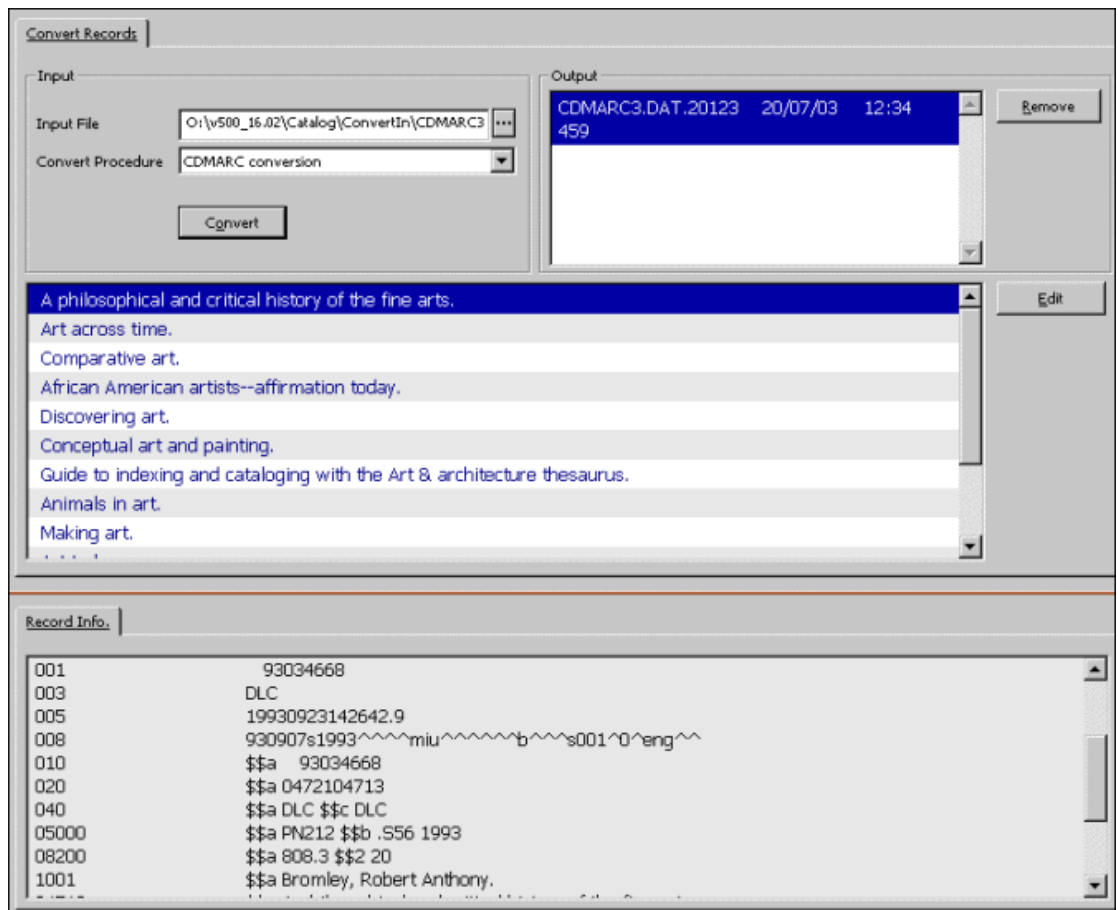


To convert and import records, follow the steps below:

1. Enter the name of the file you want to convert in the Input File field of the upper pane, or click the button at the right side of the field to select the drive, directory and filename of the file from the Open an Input File window:



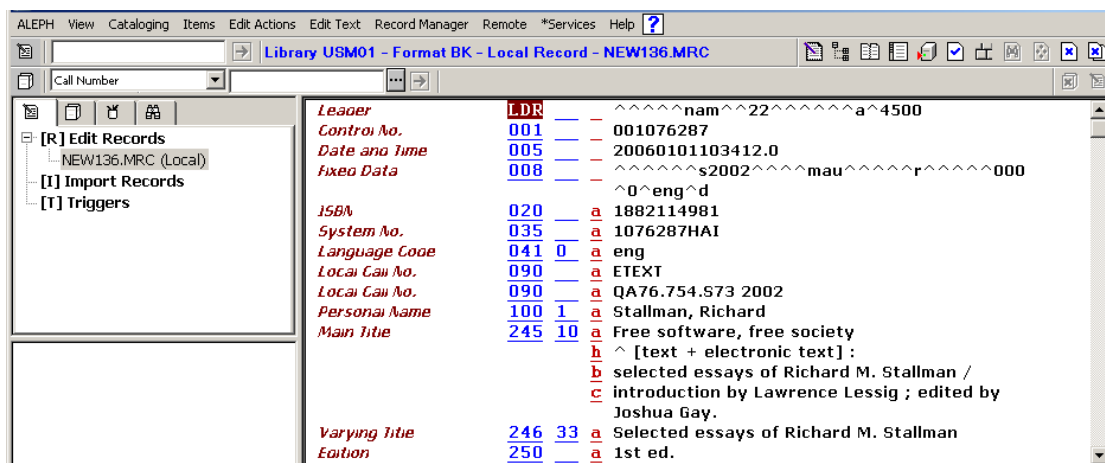
2. Select the conversion program to be used to convert the file from the Convert Procedure drop-down menu and click **Convert**. A new file with the converted records is created:



The filename of the new converted file is displayed in the Output files list of the upper pane.

The list of converted records is also displayed in the upper pane. The contents of the currently highlighted record are displayed in the lower pane.

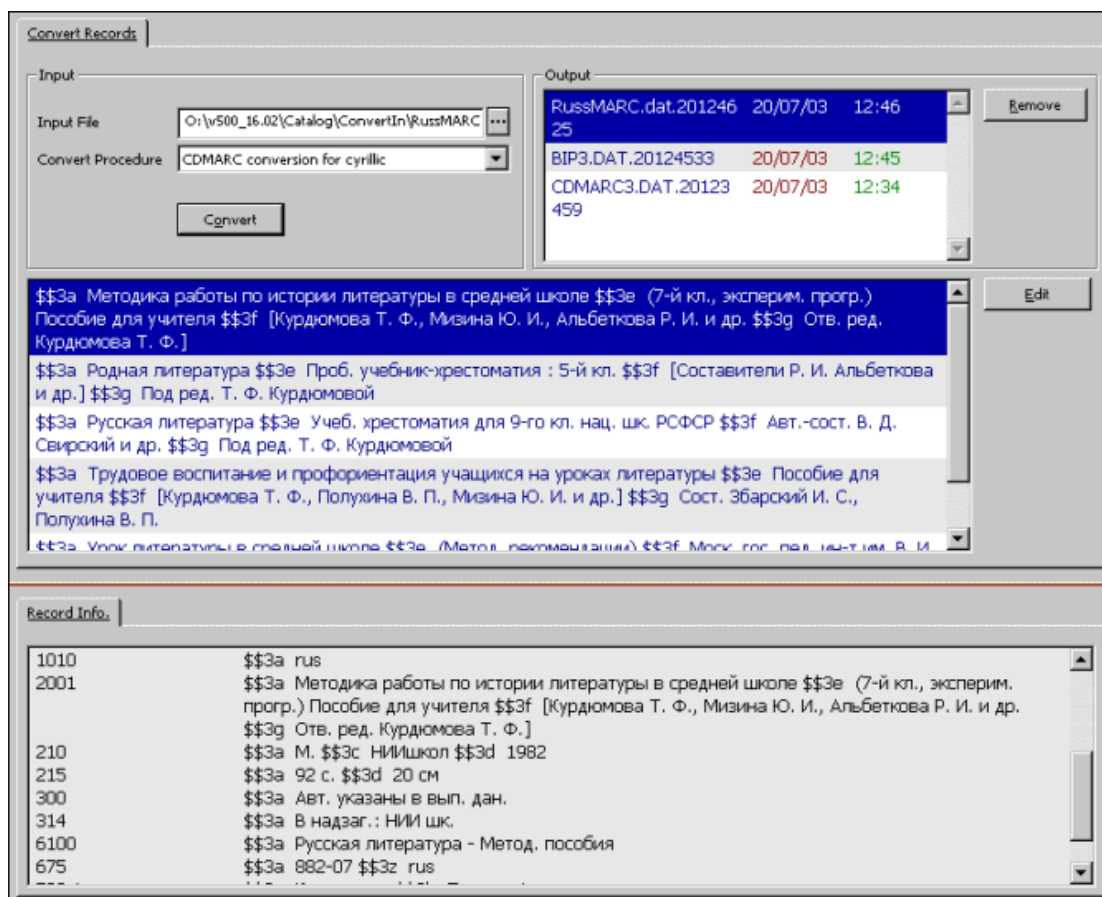
If you want to edit a record after the conversion, highlight the desired record and click Edit. The system automatically switches to the Edit Records subfunction of the Cataloging tab. A copy of the converted record is displayed in the upper pane, ready for you to edit:



Note that more than one record can be selected at the same time by pressing the Ctrl

key while pointing at the pertinent records and clicking the left mouse button. When multiple records are selected for editing, the lower pane is left empty. After you click Edit, the system transfers the records to the Edit Records subfunction for further editing.

If you do not want to edit the records immediately, you can edit converted records later by accessing the Import Records function once again. Converted files are kept unless the Remove button is clicked. In the following example, there are four different files with converted records:



To view the records in a file, select the file from the Output list. To remove a file, click **Remove**.

13 Overview Tree


This chapter includes the following sections:

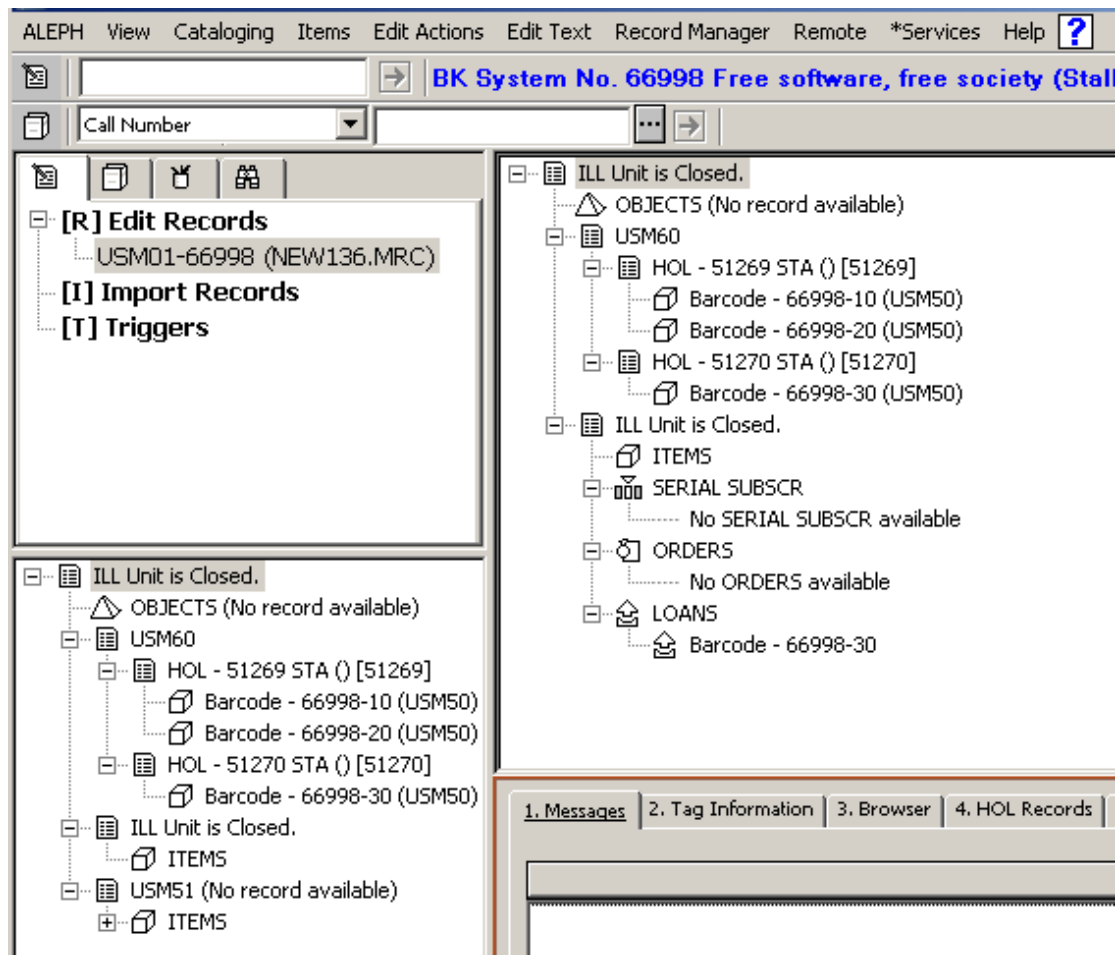
- Full Screen
- Split Mode

The Overview Tree shows the records in the system that are related to the cataloging record being edited (which is shown in the Catalog Editor - upper pane). For example, it displays the holdings records, the administrative record, and the items,

subscriptions, orders and loans attached to the selected cataloging record. The information is displayed in tree structure.

In a multi-ADM environment, the ADM and HOL libraries displayed in the tree are filtered according to the ADM library assigned to the connected staff user. For example: if the connected staff user is assigned to XXX50 ADM library, the ADM library displayed in the tree will be XXX50. If the connected staff user is a super staff user and is therefore assigned ADMIN in the User Library field (details available from your project manager or support desk), then all the ADM libraries which are related to the BIB library will be displayed.


To view the Overview Tree of a record, call up the desired record and select the Overview Tree option from the Cataloging menu or click the Overview Tree icon  from the Cataloging bar. The Overview Tree is displayed in the upper pane as follows:

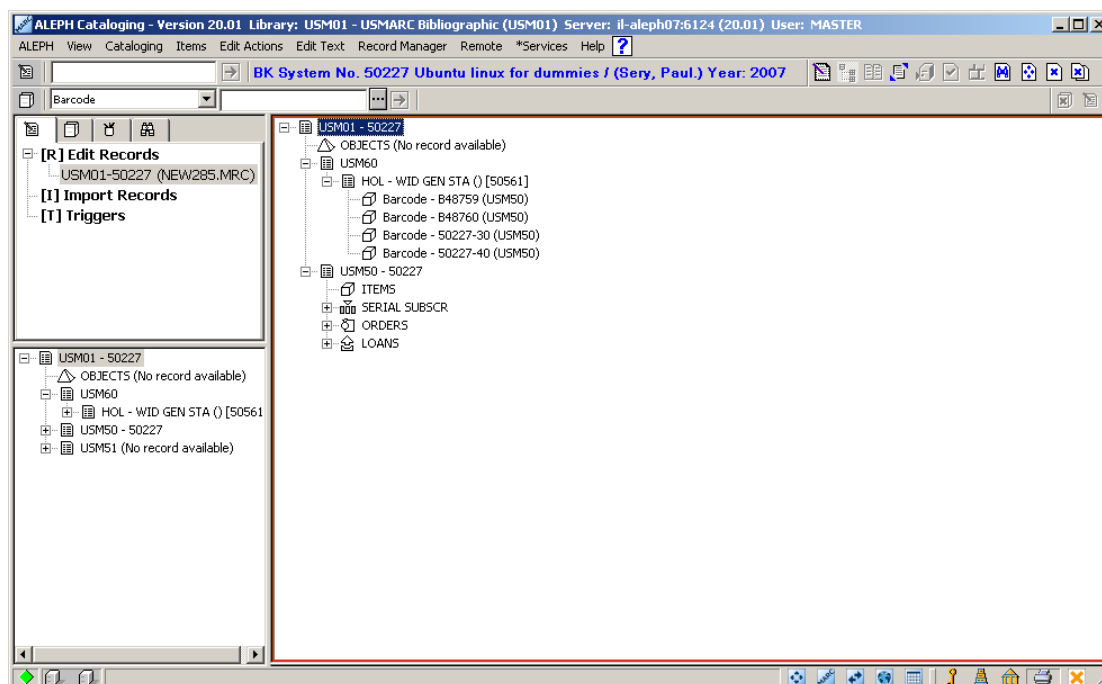


To close the Overview Tree and switch back to the cataloging record, select again the Overview Tree option from the Cataloging menu or click the Overview Tree icon from the Cataloging bar.

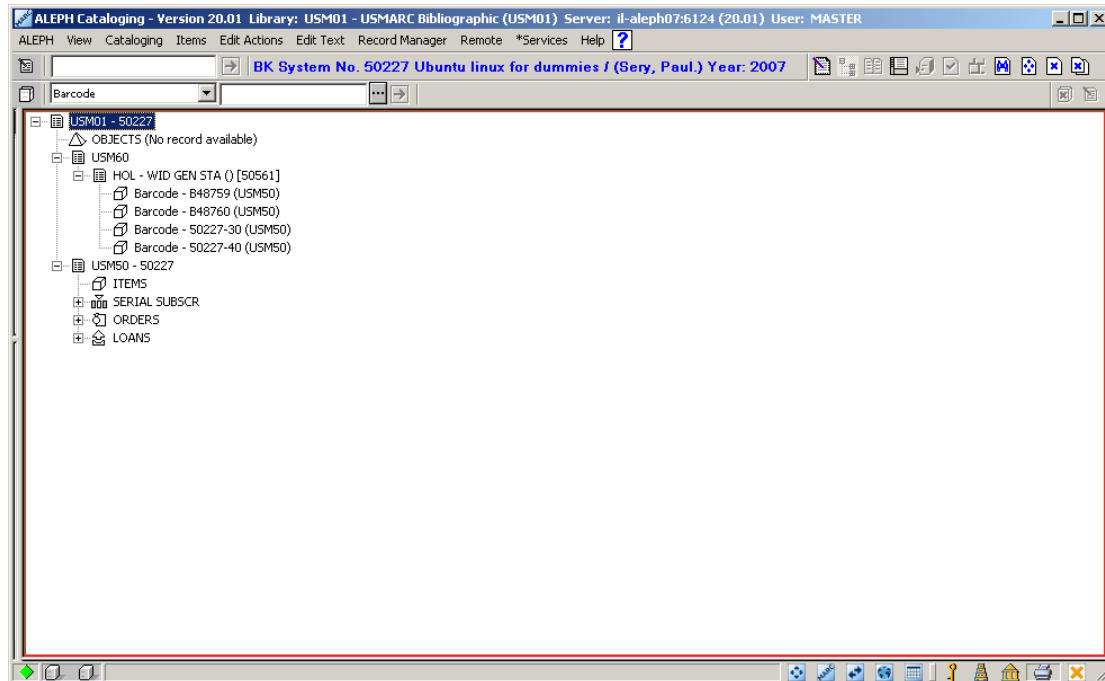
13.1 Full Screen

The Full Screen option enables you to display as much as possible on the screen of the Overview Tree.

To view the current tree in Full Screen mode, select the Full Screen option from the Cataloging menu or click the Full Screen icon  from the Cataloging bar. When this option is selected, the lower pane is not shown and the Overview Tree takes up the upper and lower pane:




If the option is selected once again, the navigation pane is not shown and the Overview Tree takes up the whole screen:

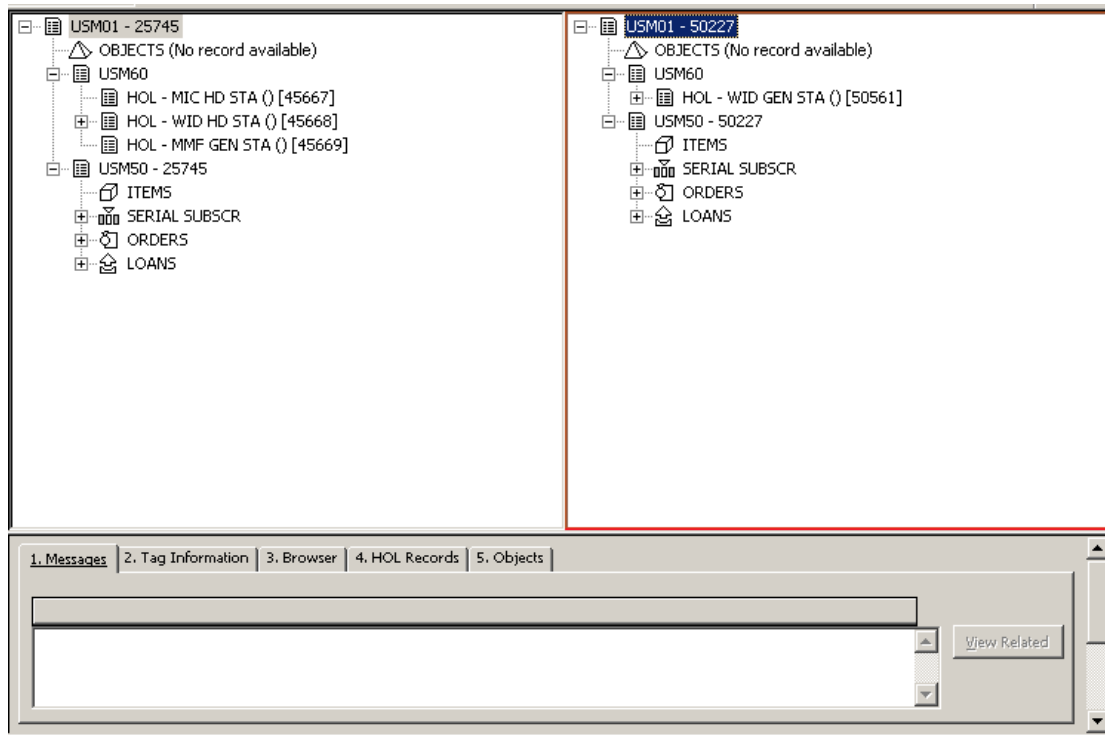


To turn off the Full Screen mode and switch to the standard view, select again the Full Screen option from the Cataloging menu or click the Full Screen icon from the Cataloging bar.

13.2 Split Mode

The Split Editor Mode option enables you to split the Catalog Editor into two sections for viewing and/or editing two cataloging records simultaneously. It also enables you to view the Overview Tree of two records at a time.

To switch to Split Editor Mode, select the Split Editor Mode option from the Cataloging menu or click the Split Editor Mode icon  from the Cataloging bar:



While the two trees are displayed, you can move item and/or acquisition orders and/or serial subscription records from one administrative record to the other. You do this by drag-and-drop or by cutting and pasting (pressing Ctrl+X, then Ctrl+V) from one tree to the other. You can also move an administrative record from one bibliographic record to another administrative record of a different bibliographic record. The function moves all items, subscriptions and orders. It also moves all holdings records which are connected to the items and subscriptions.

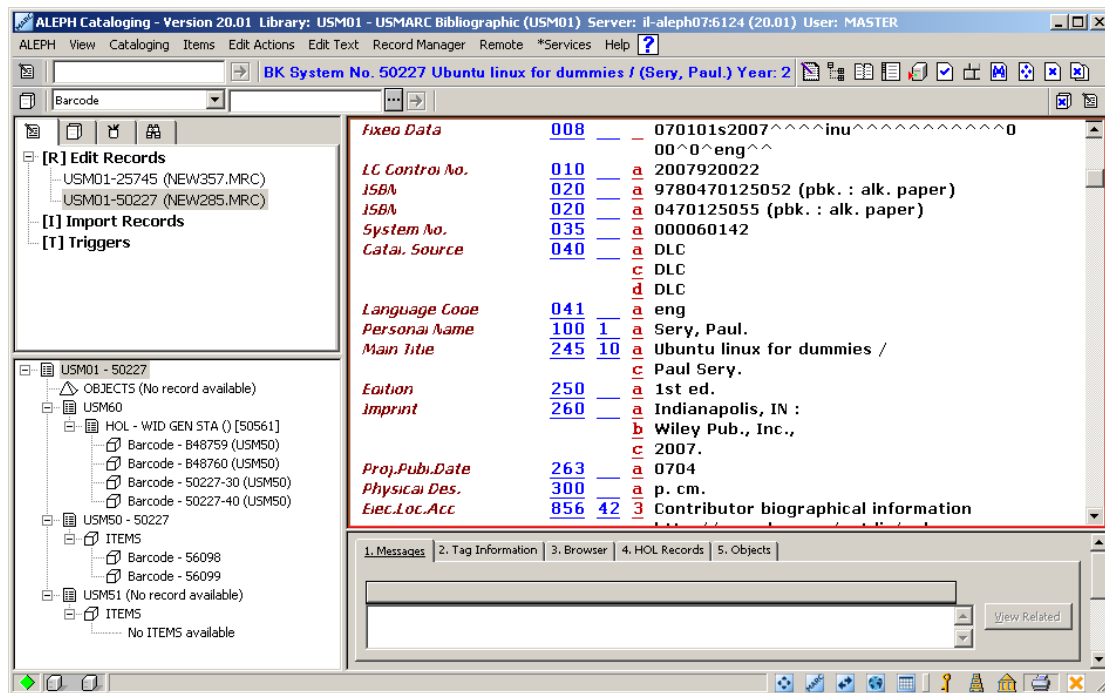
You can also move the following:

- A holdings record to another bibliographic record including attached items
- Items from one holdings record to another.

To turn off the Split Editor Mode and switch to the previous view, select again the Split Editor Mode option from the Cataloging menu or click the Split Editor Mode icon from the Cataloging bar.

14 Record Manager

The Record Manager (lower section of the left pane) displays information regarding the record currently being edited in the Catalog Editor (upper pane of the Cataloging tab). The information is displayed in tree structure after opening a record from the server or after saving a new record. Note that the pane is left empty when editing records that have not been sent to server.



The purposes of the Record Manager are the following:

- The Record Manager shows the records in the system that are related to the record currently being edited. For example, it displays the administrative record, the items and the holdings records attached to the selected bibliographic record. Note that the display in the Record Manager is limited to 800 lines.
- The Record Manager provides access to the records associated to the record currently being edited. This is done by selecting the desired node and choosing the Load/Create Record option from the Record Manager menu or by selecting the same option when right-clicking on the desired node.
 - To edit the administrative cataloging record, highlight the administrative node and click **Load/Create Record**.
 - To edit a holdings cataloging record, highlight the desired record (leaf) under the holdings node and click **Load/Create Record**.
- The Record Manager enables the creation of administrative and holdings records.

If no administrative record is linked to the bibliographic record, the message "No record available" is displayed. As explained above, when the Load/Create Record option is selected while highlighting the node of the administrative library, the administrative record linked to the current bibliographic record is retrieved and displayed for editing. If no

administrative record is available, this option automatically creates the record and displays it for editing.

For holdings records, when the Load/Create Record option is selected while highlighting the node of the holdings library, a new holdings leaf is displayed under the node. In other words, a new record is created and displayed in the Catalog Editor for editing.

- The Record Manager provides access to the Items function (Items tab) of the Cataloging module. The Items node is displayed under the administrative library node (for example, USM50). Double-clicking the Items node enables you to view and/or add information about copies to the current record. You will be transferred automatically to the Items function (Items tab) of the Cataloging module. The Items node also lists the items available for the current record. Double-clicking an item transfers you to the Items tab and it enables you to view the specific copy information of the selected item.

Note that if no administrative record is linked to the current record, when double-clicking the Items node, an administrative record is automatically created.

In a multi ADM environment the ADM and HOL libraries displayed in the tree are filtered according to the ADM library assigned to the connected staff user. For example, if the connected staff user is assigned to XXX50 ADM library, the ADM library displayed in the tree will be XXX50. If the connected staff user is a super staff user and is assigned ADMIN in the User Library field (details available from your project manager or support desk), then all the ADM libraries which are related to the BIB library will be displayed.

15 Cataloging Services

Each service is identified in the Batch Log and Batch Queue by its procedure name.

15.1 Retrieve Catalog Records

15.1.1 Retrieve Catalog Records (ret-01)

This service enables you to retrieve particular records. The document numbers can be saved in a file and afterwards printed out. To see the entire record, use one of the "Print" services.

15.1.2 Retrieve Records Using CCL (ret-03)

This service retrieves records using CCL - Common Command Language.

15.1.3 Retrieve Records by Direct Index (ret-06)

This service retrieves records based on an input file of direct index values. For example, the input file may be a list of ISBN or ISSN numbers. The output file will include the record numbers of the matching bibliographic records.

15.1.4 Retrieve Catalog Records by Date (ret-04)

This service enables you to retrieve records that were created or updated on a specific date. It retrieves records based on the Z13 or short doc record.

The document numbers are saved in two different files, one including only new records created on the specific date (called <name>.open) and the other including only records that were updated on the specific date (called <name>.update). These two files are used as input files in the various print batch services. The output files can be found in the \$alephe/scratch directory. If no name has been specified, then the selected date from the "date" field is used as a prefix for the files (yyyymmdd).

15.1.5 Cross Files (ret-10)

This service crosses two input files using Boolean operators. The input files must be files that resulted from one of the retrieve services. The service produces a new output file that includes the results of the Boolean operation.

15.1.6 Print Catalog Records - Custom Format (print-01)

This service enables you to save in a file or print out the entire record for a group of documents that have been found using the "Retrieve Catalog Records" service (ret-01) (and perhaps also sorted using the "Sort Catalog Records" service (ret-21)), or saved in the Search GUI or Web OPAC using the "Save on Server" function.

15.1.7 Print Catalog Records - Columnar Format (print-08)

This service enables you to see columns of information for records that have been found using the "Retrieve Catalog Records" service (ret-01) (and perhaps also sorted using the "Sort Catalog Records" service (ret-21)). The information can be saved in a file or printed out.

15.1.8 Print Catalog (print-04)

This service enables you to print catalog records, one after the other, on regular-sized sheets of paper that can then be bound together and used for reference.

15.1.9 Print Catalog Records with "Non-preferred" Headings (print-05)

This service retrieves and prints catalog records that are potentially incorrect, based on the fact that they include a heading field that is a cross-reference to another heading in the headings list. For example, this service might produce bibliographic records that have "Clemens" as the author, in spite of the fact that in the author headings list "Clemens" has a "see" reference to "Twain".

15.1.10 Print Bibliography (print-09)

This service enables you to print catalog records organized in the manner of a bibliography. Note that the output consists of raw XML only - that is, it requires formatting by an external program. Examples of uses for this service are:

- A catalog of new acquisitions, over a time period, sequenced by class mark
- A catalog of AV materials in the library
- A national bibliography
- An index to journal articles

The companion service, "Print Index" (p-print-10) prepares indices to the bibliography. The records in the bibliography and indices are sequenced according to a headings (ACC/Z01) list. The system actually checks each heading in the list, choosing the catalog records that are contained in the input file for inclusion in the bibliography. If no records are chosen for a heading, the heading itself is also not printed. The system can also print all "see" headings that are related to printed headings.

The resulting print file is intended for regular-sized sheets of paper that can be bound together in book format.

This service adds sequential numbering to the records chosen, in order to enable printing indices, using p_print_10. This sequential number is made up of two parts: subfield "a" contains the volume number (that is, this particular run and section), and subfield "n" contains the running number within the volume. The entries in the indices (such as author, title, subject, and so on) use this running number to refer to the entry in the bibliographic list. In this manner, the indices can be minimal, printing the heading followed by the sequence number. The sequential number will be added to the relevant bibliographic records in the tag set in this service.

15.1.11 Print Index for Bibliography (print-10)

This is a companion service to "Print Bibliography" (p-print-09). It generates indices for the bibliography. Examples of use for this utility are: indexing by authors; indexing by titles; indexing by subjects, where the basic bibliography is in some other sequence (such as classification).

The heading is printed, followed by the sequential number of the related bibliographic

records. This sequential number has been added to both the record and the output file when the "Print Bibliography" service (print-09) was run.

For example, the Author Index would appear like this:

```
Amado, Jorge 664
Amaral, Ricardo 318 319 320 343
```

In this manner, the indices are minimal.

The output in raw XML can be formatted by an external program.

15.1.12 Download Machine-Readable Records (print-03)

This service enables you to save in a file or print out bibliographic information for records that have been found using, for example:

- The Find function from the Web OPAC
- One of the Retrieve services, such as "Retrieve Catalog Records" (ret-01)

(and perhaps also sorted using the "Sort Records" (ret-21) service). You can choose to display all the fields of a record or selected fields by entering 'ALL' (in ALEPH Sequential format only).

15.1.13 Upload Remote Records via Z39.50 (print-30)

This service enables you to upload BIB and Holding information from Aleph to external database, such as KERIS (Union Catalog for Korean academic libraries), using Z39.50 gate.

When this procedure is run, new and/or updated BIB documents and their related holding information are sent to the remote database using Z39.50 gate.

For more information, refer to the Upload BIB and Holding information from Aleph to KERIS section in the *Aleph 20.01 System Librarian Guide-Cataloging*.

15.1.14 URL Check (print-11)

This service checks subfield \$u of the following fields in order to determine the validity of an external URI/URL link.

The fields are:

- 505 (Formatted Contents Note)
- 506 (Restrictions on Access Note)
- 514 (Data Quality Note)
- 520 (Summary, Etc.)

- 530 (Additional Physical Form Available Note)
- 540 (Terms Governing Use and Reproduction Note)
- 545 (Biographical or Historical Note)
- 552 (Entity and Attribute Information Note)
- 555 (Cumulative Index/Finding Aids Note)
- 563 (Binding Information)
- 583 (Action Note)
- 856 (Electronic Location and Access)

15.1.15 Sort Catalog Records (ret-21)

This service takes an input file of document numbers and sorts them. You can define the text by which the file will be sorted.

15.1.16 Export Holdings Records (export-02)

The Export Holdings Records (export-02) service can be used to export holdings records. The service retrieves and builds a file of records for export based on librarian input in field XPR in the holdings record. Note that this service is only available after connection to a holdings library (for example, USM60).

15.2 Load Catalog Records

15.2.1 Convert MARC Records (file-01) - Step 1

This function is step 1 of a process to convert records from MARC format to the ALEPH sequential format. Step 1 breaks down the input file into individual records that will be converted by step 2.

15.2.2 Convert MARC Records (file-02) - Step 2

This function is step 2 of a process to convert records from MARC format to the ALEPH sequential format.

15.2.3 Convert ALEPH Sequential to MARC Communication Format (file-12)

This function enables you to convert ALEPH sequential to MARC communication format.

15.2.4 Modify Cataloging Records File (file-08)

This service allows the user to modify a file of records in ALEPH sequential format according to a user-specified processing script. The service takes as input a file of MARC records that have been converted to ALEPH sequential format (for example, by using the Convert MARC Records - Step 1 and Step 2 services). It produces two output files. One file consists of "output" records meant for further processing or loading into the system. The other file will contain records that have been rejected based on criteria specified in the processing script.

This service can be step 3 of a process to convert records from MARC format to the ALEPH sequential format. The previous steps would be "Convert MARC Records - Step 1" (p_file_01) and "Convert MARC Records - Step 2" (p_file_02). The output can be loaded into an ALEPH database using p_manage_18.

15.2.5 Convert SWETS Records (file-05)

SWETS records list the table of contents of journals. This function converts records from the SWETS format to the ALEPH sequential format.

15.2.6 Fix and Check Catalog Records (manage-25)

This function can be used to fix and check catalog records.

15.2.7 Fix Catalog Records (manage-37)

This function can be used to fix catalog records.

15.2.8 Character Conversion (manage-22)

This service converts characters from one mapping to another. The conversion table must be located in the \$alephe/unicode directory. This service is usually used for converting data files for import/export.

15.2.9 Load Catalog Records (manage-18)

This service loads catalog records into the system. These records may be MARC or MAB2 records which have been converted into ALEPH Sequential Format, or records which you have retrieved using the "Retrieve Catalog Records" function or other available retrieve functions of ALEPH.

15.2.10 Load Catalog Records - Parallel Load (manage-180)

This service loads catalog records into the system. These records may be MARC or MAB2 records which have been converted into ALEPH Sequential Format, or records which you have retrieved using the "Retrieve Catalog Records" function or other available retrieve functions of ALEPH. This service is similar to the Load Catalog Records (manage-18) service. The difference is that this service has two additional parameters: *Delete Interim Cycle Files* and *Processes to Create*.

The Delete Interim Cycle Files parameter controls the deletion of the cycle files. This service has two stages:

- Reading the input file and splitting it into cycles with pre-assigned document numbers.
- Loading the cycle files in parallel mode.

15.2.11 Check Input File Against Database (manage-36)

This service splits an input file of documents into three output files according to user defined matching criteria.

This function produces the following output files:

- First file contains new records (no matching records were found in the database)
- Second file contains matched records (based on a unique identifier).
- Third file contains matched records, which cannot be associated with one single record in the database (multi-match)

Specifications for the match performed by these functions are defined in the library's `tab/tab_match` table.

15.2.12 Generic Vendor Records Loader (file-96)

This service loads MARC records, creates associated holdings, item, order, and budget transaction records, and encumbers the appropriate fund.

15.2.13 Advanced Generic Vendor Records Loader (file-90)

This service loads MARC records, creates associated holdings, item, order, and budget transaction records and encumbers the appropriate fund.

This is done using the vendor input file with the ability to merge duplicate bibliographical and holding records and identify records which match multiple existing records.

15.2.14 Load MARCIVE Records (file-99)

The MARCIVE document loader is a service designed to be run by libraries on a periodic basis as they receive MARCIVE data files. These files are normally received on a weekly basis and then updated on a monthly basis. There are two types of MARCIVE government document record files:

- Weekly shipping lists - brief cataloging of the documents which the library receives from the GPO.

- Monthly full cataloging - full government document MARC cataloging, which may or may not correspond to the shipping list records.

15.2.15 Load BNA Records (file-98)

This is a process to convert and load BNA records. BNA records are MARC records for both U.S./Canadian and U.K./European editions of English language titles provided by Blackwell's technical services. There are three types of BNA records:

1. Packing List Records: MARC-formatted records, containing a brief bibliographic description.
2. MARC Records: Cataloging records derived from LC MARC, CAN MARC, or UK MARC records are provided for both U.S./Canadian and U.K./European English language titles.
3. MARC-PLUS Records: Cataloging records as described above with the addition of 9xx fields containing Approval profile data, book invoice data, and fund data, are provided for both U.S./Canadian and U.K./European English language titles.

15.2.16 Pre-process Input File of Records Before Load (manage-39)

The purpose of this process is to filter an input file of records before loading them to the database (using, for example, the Load Catalog Records - manage-18 - service), when the input file includes records that are identified as "unwanted" in LDR/22, or includes records that are duplicated within the file.

This service splits the input file of documents into three output files:

1. The first file (Output File) contains records which can be submitted to the batch load process.
2. The second file (Duplicate Records File) contains the second and higher iterations of duplicate records. This file should be submitted to the batch load process after the first file, so that they can find a match, and go through match/merge procedures.
3. The third file (Discarded Records File) contains records that should not be loaded.

15.2.17 Create Holdings and Item Records Using Bibliographic Data (manage-50)

This service can be used to create ALEPH holdings and item (Z30) records. The information used to generate the holdings and item records is taken from fields embedded in bibliographic records that have already been loaded into an ALEPH BIB library (for example, using p-manage-18).

15.2.18 Merge Records (manage-38)

This service is used to merge catalog records according to merge programs defined in the tab_merge table. It produces a report of the merged records. This service should be run before loading catalog records into the database. The input file can contain one of the output files produced by p-manage-36 (Match Records).

15.2.19 Load OCLC Records (file-93)

This service loads OCLC records in batch mode into the system without making use of the OCLC Server. This service can load both bibliographic and authority records. The service creates an output file that can be found later in the library's PRINT directory. The file has the same name as the input file.

The output file contains the following information:

Administrative library, OWN Field, Open Date, Log No., Action (Success, Failed or Information), Message information.

This information is also saved in the Loader Logger (Z73 Oracle table).

15.2.20 Produce Report for Loader Logger (file-94)

This service produces a report of records loaded into ALEPH using the OCLC and MARCIVE loaders.

The information generated in the report comes from the Loader Logger (Z73 Oracle table.)

15.3 Build Indexes to the Catalog

15.3.1 Rebuild Word Index (manage-01) Target

This service rebuilds the Word Index of the database. It locks the ALEPH system and should only be run when the library is closed.

15.3.2 Update Direct Index (manage-05)

This service updates the Direct Index of the database. It locks the ALEPH system and should only be run when the library is closed.

15.3.3 Update Headings Index (manage-02)

This service updates the Headings Index of the database. This procedure locks the library and should only be run when the library is closed.

Note that whenever you run this service with the Duplicate Mode set to No, you must run the Alphabetize Long Headings (manage-17) service in order to have correct alphabetization of long headings.

15.3.4 Update Sort Index (manage-27)

This service updates the Sort Index of the database. This procedure locks the library and should only be run when the library is closed.

15.3.5 Alphabetize Headings - Setup (manage-16)

This setup service alphabetizes the headings according to the rules for alphabetization that are kept in the `tab00.lng` table and the `tab_filing` table.

These rules create a "filing text" by which the heading is alphabetized. The headings are then alphabetized according to the first 69 characters of the filing text of each entry.

The Alphabetize Long Headings (manage-17) service alphabetizes those headings whose filing texts are longer than 69 characters.

After you run this service, always run the Alphabetize Long Headings (manage-17) service. This service locks the library and should only be run when the library is closed.

15.3.6 Alphabetize Long Headings (manage-17)

This service alphabetizes those headings whose filing texts are longer than 69 characters. This service locks the library and should only be run when the library is closed.

15.3.7 Update Short Bibliographic Records (manage-07)

This service updates the Short Bibliographic Records or/and Z00R records of the database. This service locks the ALEPH system and should only be run when the library is closed.

15.3.8 Update Indexes for Selected Records (manage-40)

This service writes the requested document numbers in the Z07 Oracle table, after which the records are re-indexed through the library's usual updating process (`ue_01`).

15.3.9 Build Counters for Logical Bases (manage-32)

This service builds the counters for logical bases. It should be run after building a Headings index (manage-02), if your database setup is configured for using this counter.

15.3.10 Update Brief Records (manage-35)

This service updates and creates brief records. It locks the ALEPH system and should only be run when the library is closed.

15.3.11 Create Links Between Records (manage-12)

This function creates links between records of the database. It locks the library and should only be run when the library is closed.

15.4 Catalog Maintenance Reports

15.4.1 Delete Unlinked Headings (manage-15)

If you have connected to a bibliographic library, this service deletes headings that are not linked to bibliographic records. If you have connected to an authority library, this service deletes headings that are not linked to authority records.

15.4.2 List Unauthorized Headings (auth-03)

This service generates a report listing the headings in the bibliographic library that are not linked to headings in the authority library.

15.4.3 Detect Similar Headings (manage-26)

This service detects similar headings whose filing texts are identical. It detects headings that are probably the same except for punctuation.

This service can run on all the indexes (Check All Headings option) or on a specified code (Check Headings by Code + Choosing a Code).

15.4.4 List Headings Having Multiple Document Records (auth-04)

This service creates a report that lists the bibliographic and/or authority headings present in more than one record.

Note that since ALEPH requires that only one authority record be linked to a heading, this report can be especially useful in the authority database.

15.5 Catalog Maintenance Procedures

15.5.1 Fix and Check Catalog Records (manage-25)

This function can be used to fix and check catalog records.

15.5.2 Delete Unlinked Headings (manage-15)

If you have connected to a bibliographic library, this service deletes headings that are not linked to bibliographic records. If you have connected to an authority library, this function deletes headings that are not linked to authority records.

15.5.3 Alphabetize Long Headings (manage-17)

This service alphabetizes those headings whose filing texts are longer than 69 characters. This service locks the library and should only be run when the library is closed.

15.5.4 Global Changes (manage-21)

This service enables you to make a change in all catalog records that meet your selection criteria. Alternatively, you may choose NOT to change the records at this time, but only to produce a report of records that are eligible to be changed according to the criteria you enter in this form.

15.5.5 Delete "CAT" Fields (manage-13)

This service updates records by deleting the "CAT" fields that are no longer needed. The "CAT" field contains information about the date and time of the record creation or update (\$\$c, \$\$h) and cataloger username (\$\$a).

15.5.6 Create/Update Z106 Table for "CAT" Field (manage-19)

This service creates or updates the Z106 Oracle database table that contains information about the "CAT" field of a record. You can then use SQL commands to retrieve records that were created or updated by a particular cataloger.

15.5.7 Delete Bibliographic Records Including Related ADM/HOL Records (manage-33)

This service deletes bibliographic records found using one of the retrieve functions (for example, using the "Retrieve Catalog Records" batch process). This service also delete all records (for example, items, orders, loans, holds, and so on) linked to these bibliographic records.

15.5.8 Copy Tags to Linked Records (manage-55)

This service can be used to copy tags from one library type to another (the tags are copied from the selected records to the associated records in the target library). This service can be used, for example, to transfer holdings information from the bibliographic record to the linked holdings record.

15.5.9 Load PALAS Shelfmark (manage-45)

This batch service inserts a shelfmark into the \$\$ 852 j field of a holdings record. The shelfmarks are generated in a file by the PALAS system. The job accepts as a parameter a file name located in \$data_scratch. Each line in the file contains the holdings record number, a comma, and the shelfmark.

Example: *000001234,YA.1998.b.4722*

15.5.10 Update Cataloging Records (file-95)

This service updates existing Cataloging records in the database with input records in MARC format.

The incoming record must include the record's system number in the 001 field and a field from the record in the database that is to be matched.

The program supports the following functions:

- MAT (MATCH) - matches the line in the input file with a line in the record. The match is on the tag and indicators as well as on the contents. The matched field is deleted after matching if the database is updated.
- ADD (ADD) - adds the new field if the line is matched.

15.6 Union Catalog / Union View

Note

All changes in Z120 are automatically transferred to Z127 by one of the Z127 triggers.

15.6.1 Create Equivalencies Table (union-01)

This service builds empty equivalencies records (Z120) for each bibliographic record.

The equivalencies table (Z120) stores record equivalencies - that is, it stores a list of system numbers of records that the equivalency algorithm determines to be equivalent. The data in this Oracle table is used to create de-duplicated search results and merged display.

15.6.2 Populate Equivalencies Table (union-02)

This service populates empty equivalencies records (Z120).

Empty equivalencies records are built for each bibliographic record by the Create Equivalencies Table (union-01) service after initial conversion and data load.

15.6.3 Rebuild Record Equivalencies (union-04)

This service rebuilds record equivalencies for records that have equivalencies records (Z120) flagged **N** for update.

The equivalencies table is populated by the Populate Equivalencies Table (union-02) service. This service sets the Update flag to **C** (checked). When records are changed, deleted or added, the old equivalencies cannot be kept and the equivalencies table for these records must be updated. For this reason, new/updated records are flagged **N** for update. This service updates the equivalencies table for these records.

15.6.4 Convert Records (union-03)

The Convert Records (union-03) service converts files of incoming records for further load to the Union Catalog. There are three stages to record conversion:

- Conversion from the incoming format into ALEPH sequential
- Field-by-field data conversion or enrichment
- Record validation

15.6.5 Load Records to Union Catalog (union-13)

The Load Records to Union Catalog (union-13) service takes records that have already been converted, fixed and validated, and loads them into the ALEPH Union Catalog database. The records for load are taken from the converted directory of the contributing library or organization (input stream). The load process itself does the following; loads new records, overlays or deletes existing records, indexes new and updated records, and builds empty equivalencies records (Z120) or flags existing equivalencies tables for update.

15.6.6 Purge Identical Records (union-07)

This service finds duplicate SID fields and selects the most recent using the 005 field. Earlier versions of the same record are purged (removed completely from the database). If 005 fields are equal, the record with the newest system number is selected.

We recommend that you run this service following the first load of records into the union catalog after your site has gone into production.

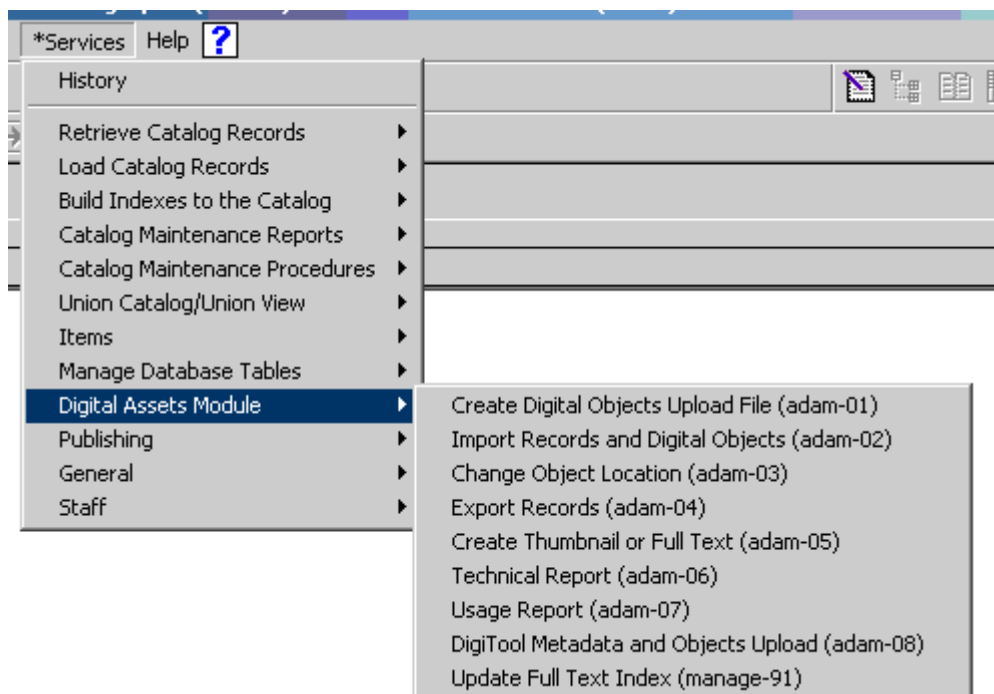
15.7 Manage Database Tables

The services in this section are explained in detail in the Services chapter of the *Circulation Staff User Guide*.

15.8 Digital Asset Module

ALEPH offers various batch services to import and export digital objects and metadata. While descriptive metadata (bibliographic) is stored as part of the bibliographic record (Z00), the technical metadata is stored in its own Oracle table (Z403).

Both import and export are based on XML files that contain specific sections for descriptive metadata and technical metadata. To upload objects into the system, usually, you need to run two services (adam-01 and adam-02). Both are part of the services menu:



15.8.1 Create Digital Objects Upload File (adam-01)

This service is used to create an XML file that is required to upload files into the system that do not have descriptive metadata (bibliographic records) or technical metadata (Z403).

The XML file created by this service contains descriptive and technical metadata generated by using a template (z403_template.xml) that has to be manipulated by the user. The XML file created by this service can be taken to load objects and metadata into the system using the adam-02 service.

A sample XML template to be edited by the user can be found in the tab directory of USM01.

The XML file contains different sections for descriptive (<record>) and technical metadata (<z403>).

The following is an example of the XML file:

```
<file>
<record>
  <leader>^^^^^nam^^^^^^^^^^^a^4500</leader>
  <controlfield tag="FMT">VM</controlfield>
  <controlfield tag="008">^^^^^^b^^^^^000^^^und^d
  </controlfield>
  <datafield tag="100" ind1="0" ind2=" ">
    <subfield code="a">Michelangelo Buonarroti</subfield>
    <subfield code="d">1475-1564</subfield>
  </datafield>
  <datafield tag="650" ind1=" " ind2="0">
    <subfield code="a">Painting, Italian</subfield>
  </datafield>
</record>

<Z403>
  <Z403>
    <Z403-OBJECT-STORAGE>
      <Z403-MEDIA-TYPE>IMAGE_JPG</Z403-MEDIA-TYPE>
    </Z403-OBJECT-STORAGE>
    <Z403-USAGE-TYPE>VIEW</Z403-USAGE-TYPE>
    <Z403-NOTE></Z403-NOTE>
    <Z403-COPYRIGHT>
      <Z403-COPYRIGHT-FLAG>Y</Z403-COPYRIGHT-FLAG>
      <Z403-COPYRIGHT-NO-COPIES>000</Z403-COPYRIGHT-NO-COPIES>
      <Z403-COPYRIGHT-TYPE></Z403-COPYRIGHT-TYPE>
      <Z403-COPYRIGHT-OWNER>PUBLIC</Z403-COPYRIGHT-OWNER>
      <Z403-COPYRIGHT-CHECK></Z403-COPYRIGHT-CHECK>
    </Z403-COPYRIGHT>
  </Z403>
</file>
```

When adam-01 is run, another XML file is generated that contains the descriptive and technical metadata and a relative path to the digital objects.

This XML file has the same name as the directory it is in, plus the `.xml` file extension. For example, if the directory that contains the objects and the template is named `createxml`, the XML file resulting after adam-01 has been run will be `createxml.xml`.

This XML file can be used for the actual upload with the service adam-02.

Note that the XML file will contain the digital object's filename as title if no explicit title is specified in the `<record>` section of the template.

The `No. of Created Bibliographic Records` parameter determines the number of bibliographic records that will be created.

The `"One record per object"` option creates a metadata record (in other words a bibliographic record) for each digital object.

The `"Single record for all objects"` option creates a single metadata record for all digital objects processed by the service.

15.8.2 Import Records and Digital Objects (adam-02)

This service takes the XML file generated with adam-01 or any other XML file with appropriate format and content and uploads it into the system. This service creates records in Z00 (bibliographic) and Z403 (technical metadata) according to the definitions in the XML file.

Note that the XML file to be loaded is required to have the same name of the directory plus the `.xml` file extension, otherwise it will not be loaded. If the XML file was created using adam-01, it will already have this format.

Note in addition that if the Z403-TITLE field is not filled, the system takes the content of Z13-TITLE instead. The Z13 record is automatically created during the load of the descriptive metadata (Z00) according to standard configuration (tab22).

You can upload digital objects to existing bibliographic records without changing the descriptive metadata (bibliographic). To do this, edit the XML file generated with adam-01 or delivered in an appropriate format and leave all field tags in the `<record>` section empty and add the following line to the `<record>` section in the template.

```
<controlfield tag "SYS">NNNNNNNN</controlfield>
```

NNNNNNNN is a variable for the record's system number. For example,

```
<controlfield tag "SYS">000050018</controlfield>
```

 will upload objects to the bibliographic record #000050018.

Note that if the system number does not exist in the catalog, no objects will be uploaded.

15.8.3 Export Records (adam-04)

This batch service exports Z00 (descriptive) and Z403 (technical metadata) Oracle records in the defined XML format that is similar to the XML format that is used for import. In addition it allows you to export not only the metadata but also the object itself.

You can limit this service to a range of records contained in an input file created by the ret-01 service.

Note that the output directory is always located as a subdirectory under the library's export directory.

15.8.4 Change Object Location (adam-03)

Digital objects are stored in a defined storage directory on the server. If you want to move objects from one directory to another directory, for example, when adding another disc to the server, you can use this batch server to physically transfer the objects to a new destination directory. Simply enter the source directory that contains the objects that should be transferred, the destination directory that is designed to be the new storage directory for the objects and the library on which you wish to run the service.

15.8.5 Create Thumbnail or Full Text (adam-05)

Thumbnails for image objects and full text for text objects can either be created by using the functions in the objects lists or by using this service. Use this service to create thumbnail and full text when working with a large amount of new records instead of updating the objects one by one.

To run this service you can define a range of records or use an input file that may be created by ret-01.

15.8.6 Technical report (adam-06)

This batch service is used to create a statistical report. It counts all Z403 records and prints a summary. This summary includes the following information.

- Number of objects, total
- Number of objects per usage type
- Number of objects per ADM
- Storage, total
- Storage per directory
- Storage per extension

15.8.7 Usage Report (adam-07)

This service is designed for monitoring of user accesses. It generates a detailed breakdown of accesses sorted by various criteria. You can limit this report to a range of dates.

15.8.8 DigiTool Metadata and Objects Upload (adam-08)

This service is used for converting and loading metadata and objects which have been provided from DigiTool and harvested in ALEPH by using ALEPH daemon ue_13 (OAI harvester). This service is limited to load objects which have Usage Type VIEW and their corresponding metadata is provided in MARC21 or Dublin Core XML format.

Thumbnails and Full text Index Files can be generated by this service.

15.8.9 Retrieve ADAM Records (adam-10)

This service enables you to retrieve ADAM records based on the contents of specific ADAM record fields. You can also retrieve ADAM records that have no linked digital objects and also digital objects that have duplicate ADAM records.

The service produces an output file that contains ADAM record (Z403) keys. This file can be used as an input file for the Delete ADAM Records (p_adam_11) service and as an additional filter for a new run of the Retrieve ADAM Records (Z403) (adam-10) service.

15.8.10 Delete ADAM Records and Related Objects (adam-11)

This service enables you to delete ADAM records and their corresponding digital objects that are stored in the local file system.

If the input file contains ADAM record keys for which the Usage Type is VIEW, the corresponding thumbnails and index files are also deleted.

15.8.11 Update Full Text Index (manage-91)

This service updates the Full Text Index of the database. This procedure locks the ALEPH system and should only be run when the library is closed.

There are two options for running the service:

- Rebuild entire Full Text index rebuilds the entire Full Text index, dropping and rebuilding the tables.
- Update Full Text index updates the Full Text index without dropping the tables.

15.9 Publishing

15.9.1 Initial Publishing Process (publish-04)

This service is used in order to perform initial extract of ALEPH catalog records for publishing purposes. The extracted records are stored in the Z00P Oracle table.

15.9.2 Delete ALEPH Published Records (publish-05)

This service is used in order to delete ALEPH published records that were extracted from the ALEPH catalog for publishing purposes. The extracted records are stored in the Z00P Oracle table. This service can be used in order to delete Z00P records.

15.9.3 Create Tar File for ALEPH Published Records (publish-06)

This service can be used in order to create a tar file of ALEPH extracted records. This file can be later transferred to a different publishing platform.

15.10 General

15.10.1 Print Trigger Report (com-01)

This service produces a printout of triggers.

15.10.2 Count of New and Updated Catalog Records - by Cataloger (com-02)

This service produces a report that contains the number of new and updated catalog records by cataloger.

15.10.3 Report of New and Updated Catalog Records - by Cataloger (com-03)

This service produces a report that contains the number of new and updated records based on CAT Fields.

15.10.4 Restart Server (sys-01)

This service stops a server and restarts it. The server that is stopped is selected by the user and can be the `pc_server`, `www_server` or the `oclc_server`. When run, the service will stop the existing server running on the default port and start a new one on the same port. If a port is specified, only that port will be restarted.

15.10.5 Rebuild Print Templates Package (sys-02)

This service rebuilds the `html.pck` file after you edit a form or a letter in the `form_eng` directory. In order that any changes to these files appear, you must run this service.

15.10.6 Update Tables Package (sys-03)

This service updates the packaged file of tables (`pc_cat.pck`) in the library's `catalog` directory. When a user connects to a home library in the Cataloging module, the system compares the tables on the client with the date of the `pc_cat.pck` package on the server. If the dates are different and the `AlwaysImportFiles` flag in `alephcom.ini` (under [Package]) is set to "N", then the user is prompted to update the tables on the client. If the dates are different and the `AlwaysImportFiles` flag is set to "Y", then the tables are imported automatically. Among other tables/files, the catalog directory contains cataloging forms (for example, `008_bk.lng` for MARC 21), cataloging templates (for example, `008_bk.lng` for MARC 21), help files (in the HTML subdirectory), codes for the FMT field (`formats.lng`), field contents for fixed text fields (`tag_text.dat`), lists of valid tags and aliases (`codes.lng`), and so on.

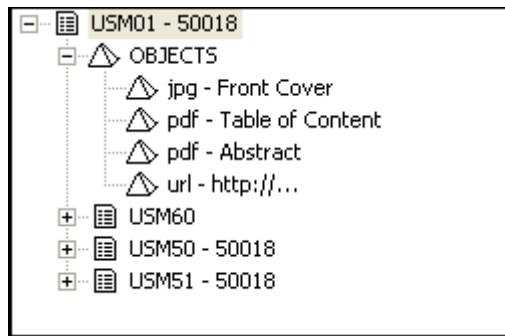
15.10.7 Record Keys Conversion (manage-70)

This service converts record keys. It takes the input file that contains record keys of one type (for example, BIB numbers) and, for each value it contains, lists the corresponding key of another type (for example, Order number).

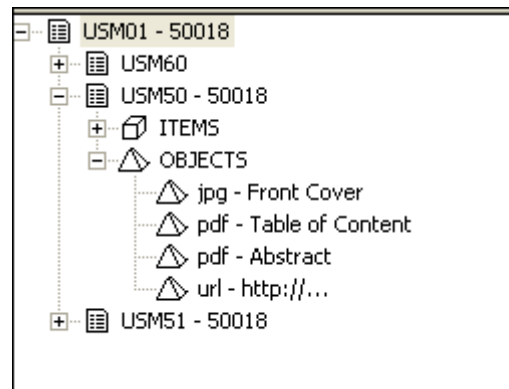
16 Managing Digital Objects with ADAM

You can use the ALEPH Digital Asset Module (ADAM) to attach digital objects, such as images, audio, video, and full-text, to BIB records. Objects attached to bibliographic records are listed in the tree structure of the Record Manager (lower section of the left pane) as a subtree to either the BIB or the ADM record. Your system librarian defines whether an object is listed as part of the BIB record or as part of the ADM record.

Objects listed under BIB Record

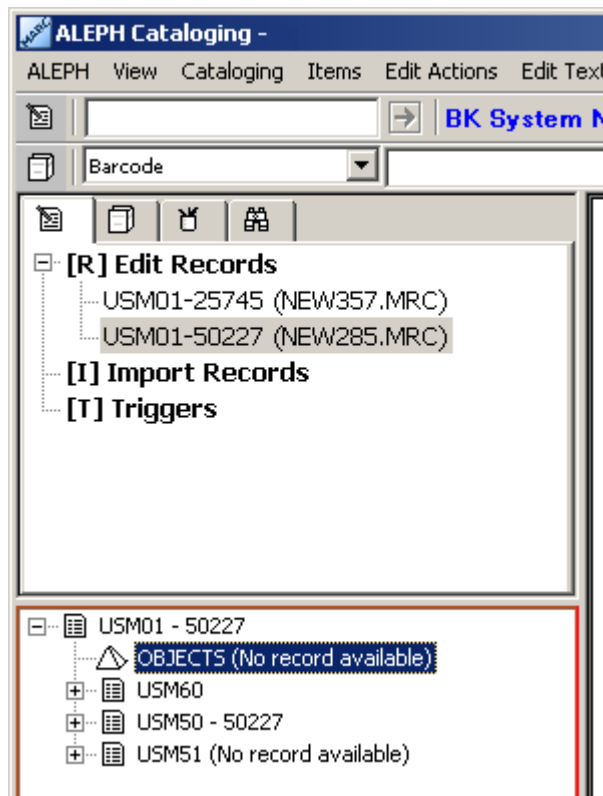


Objects listed under ADM Record



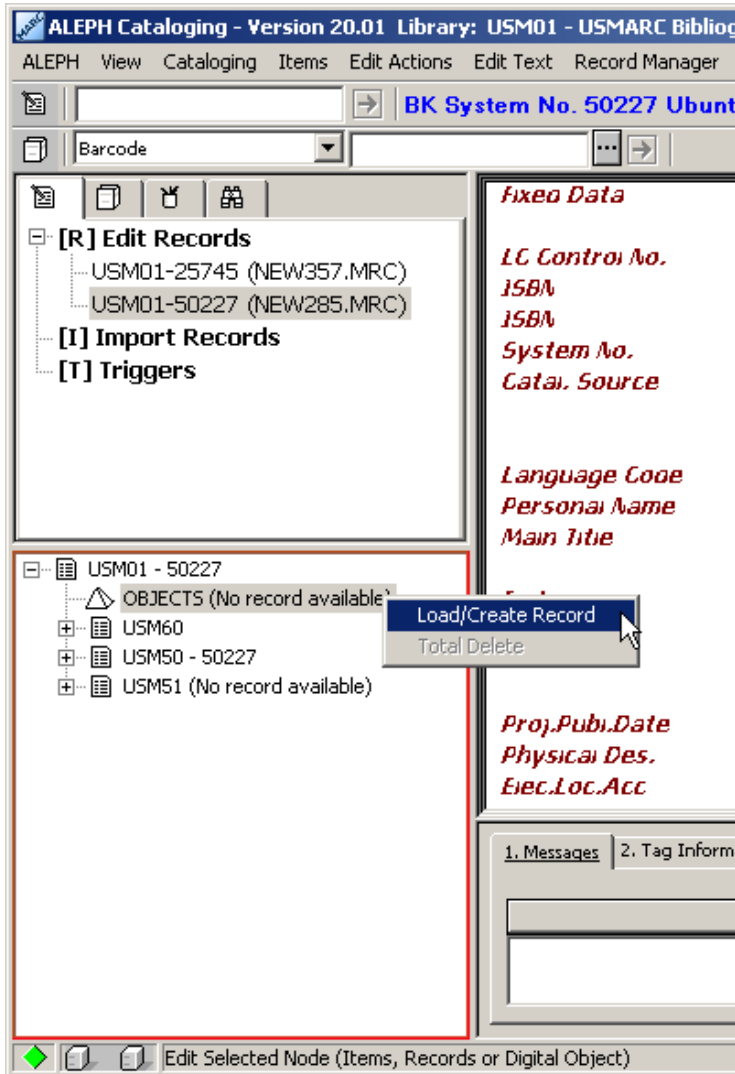
16.1 Creating New Objects

You can create Object records through the Record Manager of the Cataloging tab. If no object is attached to a BIB record, a *No Record available* message is displayed next to the object node:

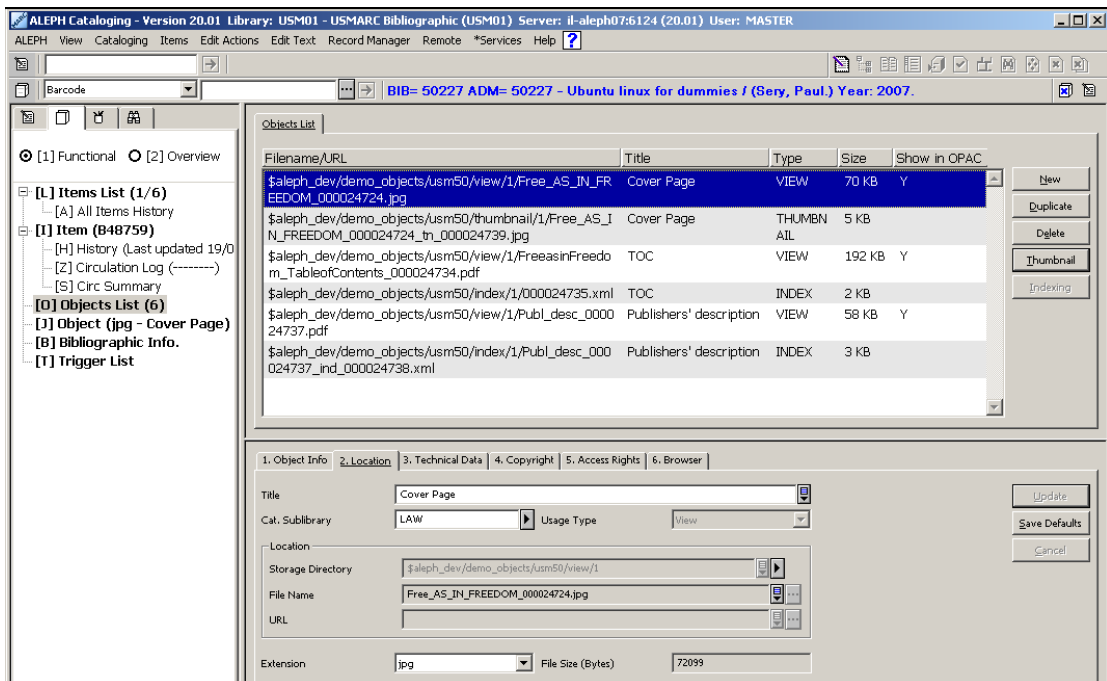


To create an object record, follow these steps:

1. Highlight the object node
2. Choose the Load/Create Record option from the Record Manager menu or by selecting the same option when right-clicking on the object node, or double-click the object node:



The Objects List opens:



There is no Aleph related limitation to the total disk space for digital objects. However, there may be operating system limits. There is no Aleph limit to the number of objects, but the size of one object is limited to 2 GB.

16.2 Objects List

The Objects List, shown above, displays the objects attached to a particular bibliographic record and enables access to various object related functions.

The following are the buttons available on this screen:

New

Click **New** to add a new object. The Object Form in the lower pane will be activated.

Duplicate

Click **Duplicate** to copy the highlighted object record. The Object Form in the lower pane will be activated and will display the details to be for you to edit.

Delete

To delete an object, highlight the desired object and click **Delete**. You will receive a prompt asking you if you are sure you want to delete. Click **Yes** if you are sure you want to delete.

Note

The **Delete** option does not only delete the object's record but also the object itself if it is stored in a directory of the file system.

Thumbnail

Click **Thumbnail** to create a thumbnail for image objects. A routine that automatically creates thumbnails will be started and as soon as it has finished you will see the thumbnail as an additional object that will be display in the Brief View of the OPAC and so on.

Indexing

Click **Indexing** to create an index for textual objects. This starts a routine that automatically converts doc and PDF to an indexable format, making the content of the text object available for full text search.

Note that the 'Character Set' for object of INDEX type must be UTF-8. When object of type INDEX contains non-UTF-8 characters, correct error message is shown.

16.3 Object Forms

All object tabs except the Object Info tab and the Browser Tab contain three buttons.

Update / Add

Click **Update** to save all changes you have made to the object record on the specific tab.

The **Add** button appears instead of the **Update** button if you have selected the **New** button of the Objects List to add a new digital object.

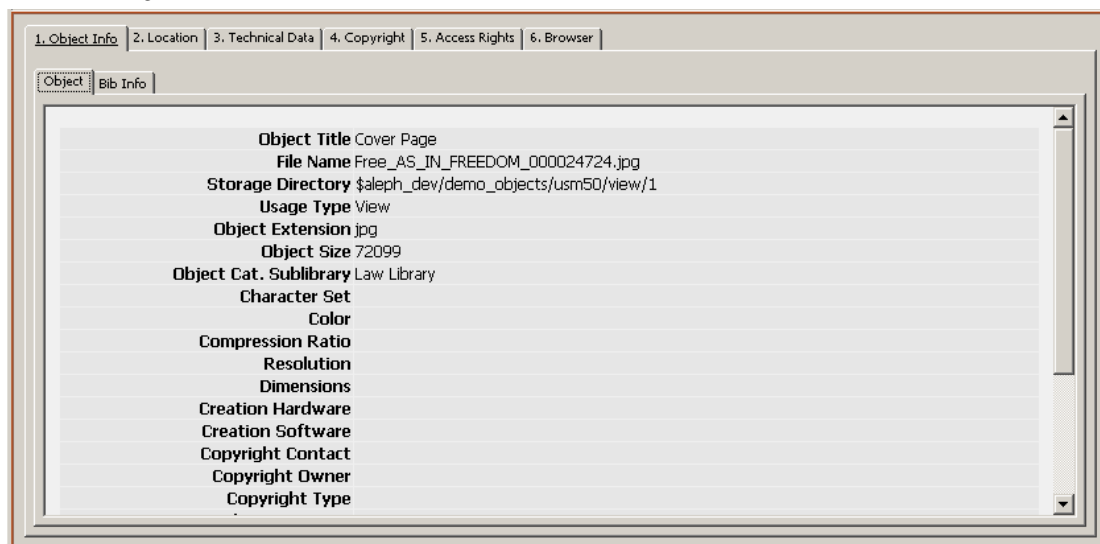
Save Defaults

When you click Save Defaults, the information entered in any fields of the current tab will be automatically used as default values when creating new item records (until you save another setup as the default). If you would like to clear all saved default values select Delete Item Defaults from the ALEPH menu.

Cancel

Click **Cancel** to discontinue the work in the lower pane and to return to the upper pane.

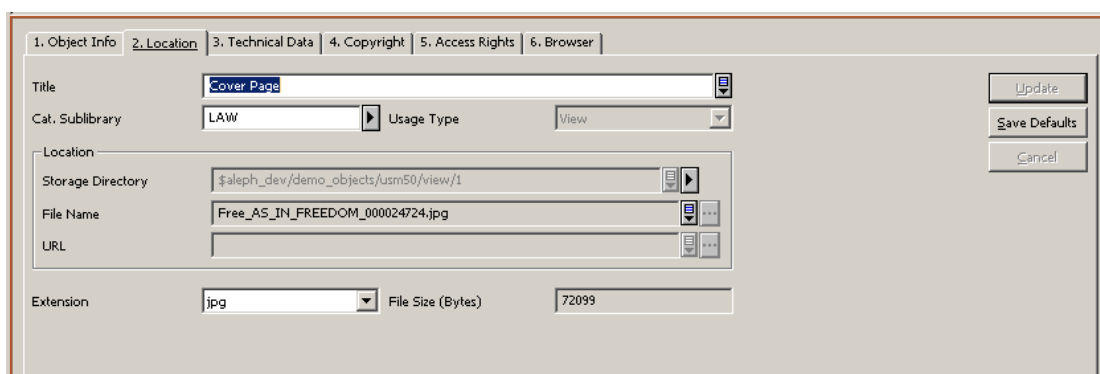
16.3.1 Object Info Tab



The Object Info Tab displays a summary of the object's metadata and some basic information on the bibliographic record to which the object is attached.

The **Object Info** tab is disabled when you create a new object until it is saved using the **Add** button.

16.3.2 Location Tab



When you create a new object using the **New** or **Duplicate** buttons of the Objects List the Location Tab is activated in the lower pane. This tab is used to enter/update an object's title, source and target information of the object's file, the object's owner and a usage type.

Title

The title information is optional. You can enter a title for the object that will be displayed in the object node of the Record Manager or the OPAC. If this field is left blank, the content of the BIB record's title field (245##) is used automatically as the object's title.

Cat. Sublibrary

The Cat. Sublibrary field is optional. It contains the code of the sublibrary that owns the digital object. This information is relevant for access and management of the object. The directory that will be offered for the storage of the digital object is dependant on this entry. A check routine ensures that a valid sublibrary is chosen.

Type or choose from the drop-down list. The following options are available.

- Blank - The object is not related to any specific ADM or sublibrary.
- ADM - If the field contains the library code of an ADM-library the object is related to this library.
- Sublibrary - The object is related to a specific sublibrary if the field contains a sublibrary code

Usage Type

The Usage Type is mandatory. It defines the context of the object's usage. For all textual and image objects that are designed to be displayed in the OPAC, select Usage Type View.

Note that the Usage Types Index and Indexing Text are used for XML objects created by the system's full text indexing routine. If you have an XML object to be indexed by the system, it must be formatted appropriately. Following is an example.

```
<?xml version="1.0" encoding="UTF-8" ?>
- <INDEX>
    <txt>Sample of xml format internally generated for
indexing of text objects</txt>
    <txt>This is the XML-format that is used by the system for
indexing</txt>
    <txt>... </txt>
    <txt>...</txt>
    <txt>...</txt>
    <txt>...</txt>
    <txt>...</txt>
</INDEX>
```

Objects created by the Indexing or Thumbnail routine of the Objects List are assigned automatically to the THUMBNAIL or INDEX usage types respectively.

Note that only thumbnails created with the **Thumbnail** button of the object list contain a clickable link to the digital object from which the thumbnail was derived.

Storage Directory

The field storage directory is mandatory and contains information about the directory that is used for storage of the digital objects. It names the path to which the digital objects will be copied.

Note that the content of this field is dependant on the sublibrary chosen. All possible storage directories belonging to the sublibrary chosen will be displayed in the list.

File Name

This field is mandatory if you are uploading a file from a local or network drive. Enter the name of the file of the digital object that you are attaching.

URL

The URL is mandatory if you are uploading a file that is accessible through a URL. Enter the URL pointing to the file on its remote server.

Extension

The Extension is mandatory. It is generated automatically but you can change it by selecting another entry from the drop-down list.

File Size (Bytes)

The File Size contains the object's size in bytes and is filled automatically by the system during the upload of the file to the server.

16.3.3 The Technical Data Tab

The screenshot shows a software interface with a tabbed menu at the top. The third tab, '3. Technical Data', is selected. Below the tabs is a form with several input fields and buttons. The fields are arranged in two columns. The left column contains: 'Character Set' (a dropdown menu), 'Color' (a text box with 'true color 24 bit'), 'Compression Ratio' (a text box with '10:1'), 'Creation Date' (a text box with '01/10/2004' and a calendar icon), and five 'Note' fields (Note 1 to Note 5, each with a text box and a small icon). The right column contains: 'Resolution' (a dropdown menu), 'Dimensions' (a text box), 'Creation Hardware' (a text box with 'ImageWare Bookkeye'), and 'Creation Software' (a text box with 'ImageWare BCS2'). On the far right of the form are three buttons: 'Update', 'Save Defaults', and 'Cancel'.

Character Set

The Character Set is recommended for textual objects that will be further used for full-text indexing. In other cases it is optional. It contains the character set of the document. This information will be used to start the appropriate routine for character conversion for full-text indexes. This field is only used for text objects such as PDF or Word. Note that the 'Character Set' for object of INDEX type must be UTF-8. When object of type INDEX contains non-UTF-8 characters, correct error message is shown.

Resolution

The Resolution is optional. You can enter a description the resolution of image objects.

Color

The Color is optional. You can enter a description the color of image objects.

Dimensions

Dimensions is optional. You can enter information on the object's dimensions for image objects.

Compression Ratio

The Compression Ratio is optional. You can enter the compression ratio of the digital object.

Creation Hardware

The Creation Hardware is optional. You can enter a description of the hardware that was used to create a digital object.

Creation Date

The Creation Date is optional. You can enter the date on which the digital object was created.

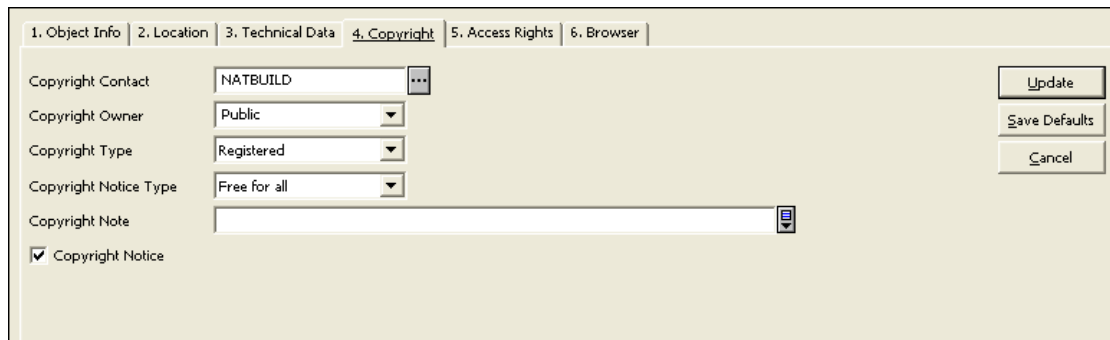
Creation Software

The Creation Software is optional. You can enter the name of the software that was used to create the digital object.

Note 1 – 5

The Note field is optional. The Note fields allow creating notes on the object. You can use this field also to enter additional local technical metadata.

16.3.4 The Copyright Tab



The screenshot shows a web-based interface for editing metadata. At the top, there are six tabs: 1. Object Info, 2. Location, 3. Technical Data, 4. Copyright (selected), 5. Access Rights, and 6. Browser. Below the tabs, the Copyright tab contains several fields: 'Copyright Contact' with a text input field containing 'NATBUILD' and a dialog button; 'Copyright Owner' with a dropdown menu showing 'Public'; 'Copyright Type' with a dropdown menu showing 'Registered'; 'Copyright Notice Type' with a dropdown menu showing 'Free for all'; and 'Copyright Note' with a text area and a list icon. At the bottom left, there is a checked checkbox labeled 'Copyright Notice'. On the right side, there are three buttons: 'Update', 'Save Defaults', and 'Cancel'.

Copyright Contact

The Copyright Contact is optional. You can enter a description of the copyright contact of a digital object. Click the dialog button at the end of the line to open the ALEPH vendors list in order to choose a vendor as copyright contact.

Copyright Owner

The Copyright Owner is optional. You can select a Copyright Owner from the drop-down list or enter text.

Copyright Type

The Copyright Type is optional. You can select a copyright type from the drop-down list.

Copyright Notice Type

The Copyright Notice Type is optional. It specifies, what type of copyright notice will be displayed, if the Copyright Notice check box (see below) is active. You can only select a copyright notice type from the drop-down list.

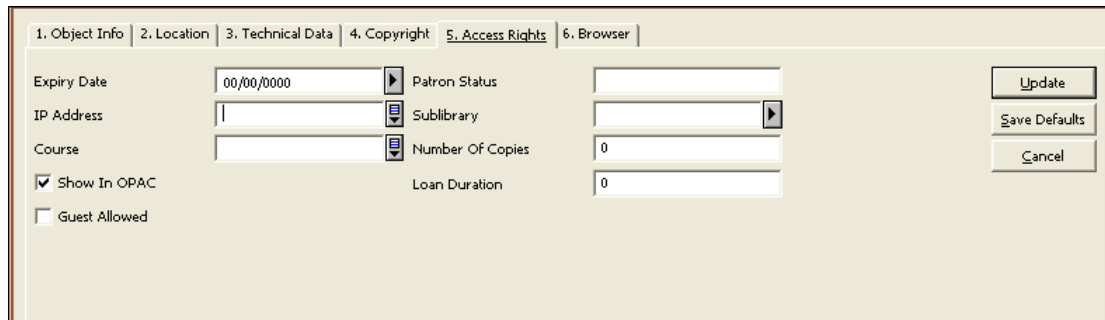
Copyright Note

The Copyright Note is optional. Use this field to add a note to the copyright information.

Copyright Notice

Select the Copyright Notice option to define whether or not a copyright notice for an object is displayed in the OPAC.

16.3.5 The Access Rights Tab



Expiry Date

The Expiry Date is optional. Use this field to define a date on which the use of the object expires. Use the dd/mm/yyyy date format. Select a date from the pop-out calendar or enter the date manually.

Patron Status

The Patron Status is optional. You can enter up to 10 user statuses (each status is two digits) separated by a comma. Object access is checked in relation to the Patron Status and Sublibrary (see below).

Note that the check for Patron Status is not yet available in this version, but you can enter patron statuses that will be checked by future versions.

IP Address

The IP Address is optional. It is used to limit object access based on the patron's IP Address. The addresses can be truncated by using the asterisk (*).

You can enter more than one IP address, separated by a blank space (up to 200 characters in total).

You may use a hyphen (-) to set a range of permitted addresses. For example: 191.206.064.12-191.206.127.32. The range may include an asterisk (*) as a wildcard which can be set in at the end of the range (for example 191.206.064.*-191.206.127.*) or in the middle (for example 191.206.*.78-191.206.*.95).

Sublibrary

The Sublibrary is optional. Select a sublibrary from the drop-down list.

The object's access rights are checked against the patron's sublibrary assignment. If the patron does not have a record for the selected sublibrary, he will not be able to view the object.

Course

The Course is optional. Use this field to restrict the display of an object based on course. If the course and the patron ID do not match, the patron will not be able to view the object.

You can enter up to ten courses, separated by a blank.

Number of Copies

The Number of Copies is optional. This field defines a limit of concurrent views for one object.

Loan Duration

The Loan Duration is currently not in use. It will be supported in future versions.

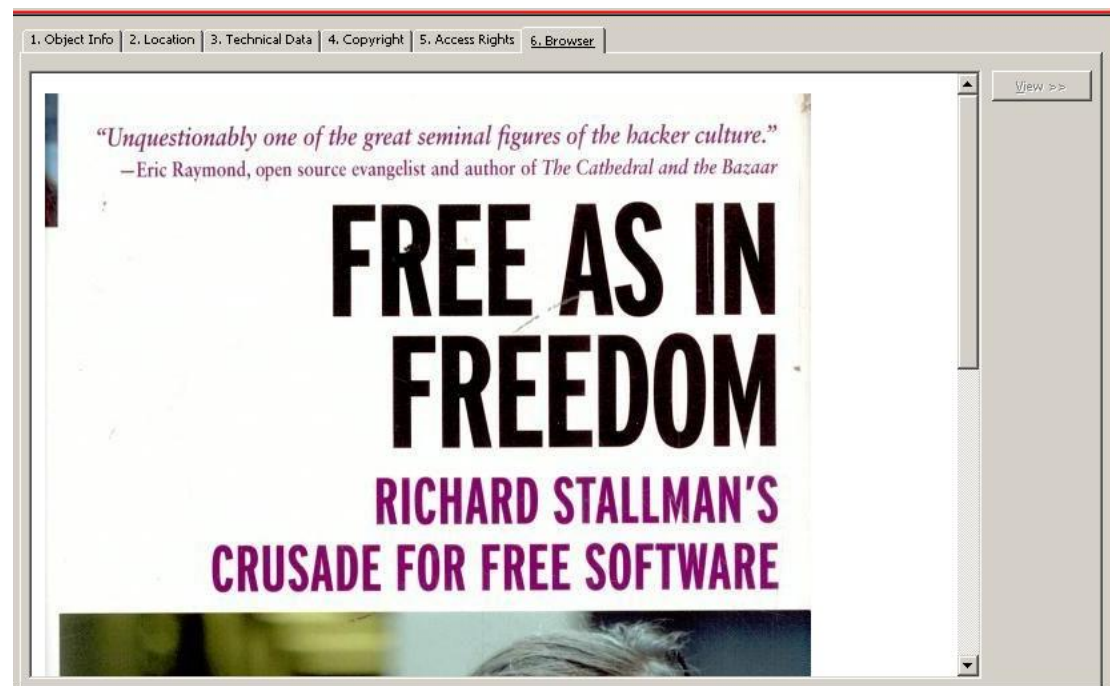
Show in OPAC

Select this option if you want an object to be displayed in the OPAC subject to the other access restrictions defined above. If you leave this option clear, the object will not be shown in the OPAC under any circumstances.

Guest Allowed

Select this option if you want non-registered users to be able to view the object. If you leave this option clear, the object will only be available for users who have signed in.

16.3.6 The Browser Tab



This tab enables you to view the selected object in your default Web browser. In order to view the object, click **View**. In some instances, the object is automatically displayed without requiring you to click the **View** button. This option is determined by the System Librarian according to the type and size of the objects.

16.4 Search for digital objects

The objects are all linked to a bibliographic record in your BIB library, which contains the descriptive metadata. Hence, the same searches as in the BIB library are available.

16.4.1 Full text search

Full text search allows you to search for all terms in documents which are registered as objects and for which you have performed full text indexing. To search the full text index, from the Object List, click **Indexing** (see [16.2 Objects List](#) on page [136](#)).

You can also use truncation but keep in mind that you must use the ,%' character to truncate when searching in full text.

16.5 ADAM Scan Interface

The purpose of the ADAM scan interface is the implementation of an automated workflow in order to enrich the libraries' catalogue with digital objects information and appropriate metadata by using the ALEPH Digital Assets Module (ADAM). The ALEPH Scan Interface enables the creation of scan jobs for items directly from the ALEPH GUI Client.

Scan jobs which have been created in ALEPH can be requested from external systems, e.g. scan software applications, in order to create the scans. For this purpose, the external system requests information about the scan jobs via Web-Services (ALEPH-X-Server, OAI) and is provided with the relevant information, including bibliographic information, item and owner information, and scan parameters.

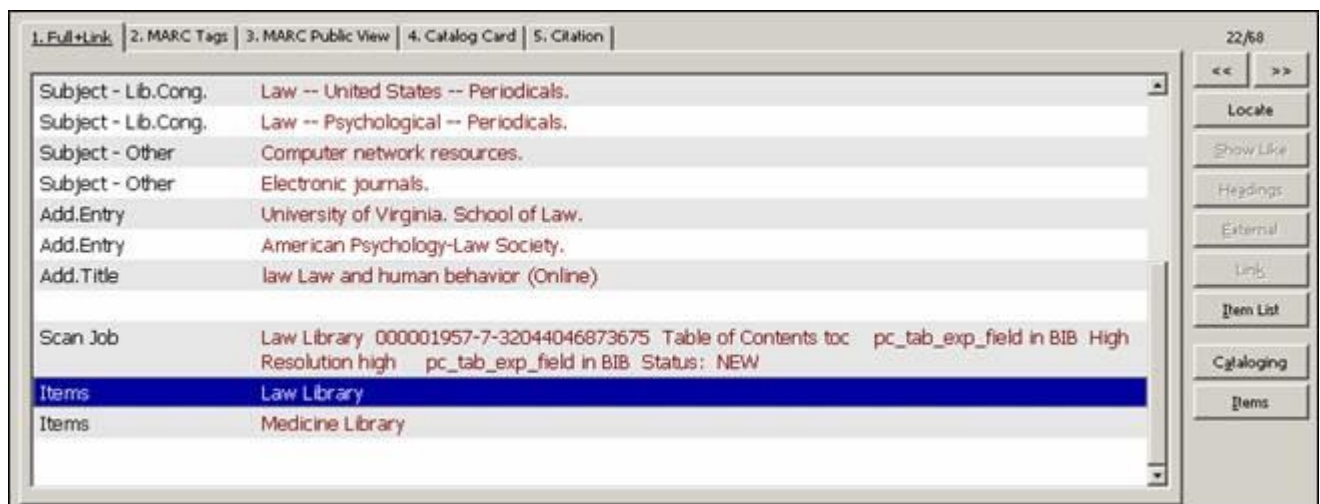
Images or text file scans which have been created from external systems can be loaded into ALEPH, as long as they are delivered in XML format (Dublin Core or MARC) and include the following identifiers:

- Identifier of the ALEPH bibliographic record to which the item that has been scanned is linked (e.g. 001)
- Identifier of the Scan Job in order to validate that the scan has been created

Furthermore, scans which have been created may be delivered to DigiTool. If so, the enrichment of the ALEPH catalogue can be automated by using the DigiTool/ADAM-interface.

Workflow

The Search tab bibliographic record full view shows information about digital object scans which already exist and scan jobs which are in process.



If you want to create a new scan job, click “Item List”. ALEPH shows either a global items list (ITMG) which includes items from all sublibraries, or a sublibrary specific item list which includes items from one sublibrary only (ITM).

Desc.	Sublibrar	Coll.	Call num	Due Date	Status	Loans	Requests	Barcode
v.9 (1985)	Law Library	General	K 12 .A914	On Shelf	Restrict ed loan	1		320440 468736 75
v.8 (1984)	Law Library	General	K 12 .A914	On Shelf	Regular loan			320440 576960 23
v.7 (1983)	Law Library	General	K 12 .A914	On Shelf	Regular loan			320440 576960 31
v.6 (1982)	Law Library	General	K 12 .A914	On Shelf	Restrict ed loan	1		320440 497261 77
v.5 (1981)	Law Library	General	K 12 .A914	On Shelf	Regular loan			320440 576960 49
v.4 (1980)	Law Library	General	K 12 .A914	On Shelf	Regular loan			320440 576960 56

Click on 'New Scan' and enter the following parameters for the scan job:

- Information about the creator of the scan job
- Details of the object to be scanned

Once created, a scan job cannot be deleted or changed. The scan parameters are saved in the bibliographic record, tag "SCJ".

In an ALEPH consortium, the management of scan jobs is part of the central system. Libraries have to create scan jobs for specific items in the central catalogue. Each scan job which has been initiated from local libraries' staff is saved in the bibliographic record of the central catalogue (tag "SCJ"). Thus, the system checks if scan jobs already exist and if so, gives a message. The check is performed according to the subfields a, b, c and d of field "SCJ".

Within an ALEPH consortium, the local library is able to see existing scan jobs from other libraries. Scan jobs are part of the replication process, which means the information is available in both central view and local view.