OCLC

Amlib
Library Management System

Catalogue Training – Short Online Course

Last Updated: 26 February 2013

OVERVIEW

Catalogue records store the bibliographic details of the items within a given collection. As such they allow users to search for and identify works within a collection grouped by author, title, subject, etc.
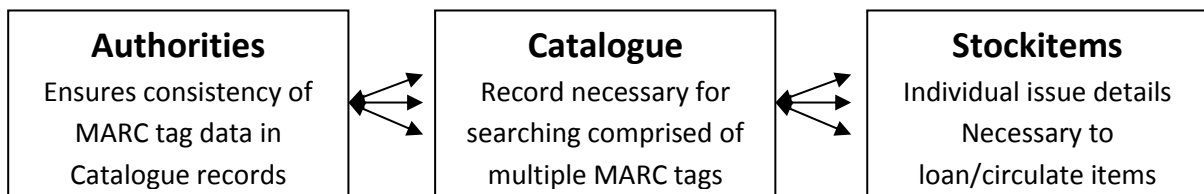
The *Authorities* and *Stockitem* modules are closely linked with the *Catalogue* module.

The *Authorities* module is responsible for the availability, maintenance and format of the Authorities: MARC tag listings (comprised of such things as authors, titles and subjects) that are standardized to ensure the consistency of the data between catalogue records. These Authorities are searched from the *Catalogue* module for insertion into a Catalogue record.

The Stockitem represents the holdings (the individual copies of an item) and can display Catalogue data according to the certain pre-defined display parameters. Whilst it is possible to create a Stockitem record that does not use a Catalogue record as the source of its bibliographic data, the Stockitem record without a Catalogue record to reference cannot be keyword searched. For example: an Inter-Library Loan usually has no Catalogue record attached, so Keyword searching is not possible because there are no underlying MARC tags.

When creating new Catalogue records, *Amlib* allows the import of MARC records from external agencies (for example: *SCIS*, *State Library of WA*, *Libraries Australia*, etc). Import is also available from the CatZServer (subject to copyright).

Functionality includes the manual creation of records from a Worksheet, as a Lead Thru Set, Duplicate or as a record built up from scratch.

Authorities		**Catalogue**		**Stockitems**
Ensures consistency of MARC tag data in Catalogue records	⇄	Record necessary for searching comprised of multiple MARC tags	⇄	Individual issue details Necessary to loan/circulate items

AUTHORITIES ⬌	CATALOGUE ⬌	STOCKITEM
Authority Control: • Maintains consistency **Standards for :** • Authors • Subject headings • Series, etc • Keyword codes assigned to MARC Tags **MARC Tags:** • Creation • Maintenance • Format (for example: hyphen in Subject headings) • *See* and *See Also* References	**Bibliographic Data:** • Contains data fields that identifies the Catalogue record • Made up of MARC Tags **Authority Shared:** *Usually searched within the <u>Authorities</u> module to maintain consistency* • Authors (**100**) • Added Authors (**700,710**) • Subject headings (**600 – 699**) • Series, etc (**440**, **490**) **Authority Non-Shared:** • ISBN (**020**) • Title (**245**) (usually) • Added Title (740) **Non-Authority Tags:** • Notes (**500 – 599**) • Publisher (**260**) (usually) • Extent (**300**)	**Holdings Data:** • Contains data fields that identifies the Item record • Displays 6 lines of bibliographic data from the Catalogue record (usually <u>Title</u>, <u>Author</u>, <u>Publisher</u>, <u>Series/ISBN</u>, <u>Subject</u>, <u>Call No</u>)as determined by the **F9 Display** parameters in the <u>Form Codes</u> screen **Other data includes**: • Barcode (<u>Item No</u>) • <u>Cost</u> • Date <u>Accessioned</u> • Date <u>Received</u> • <u>Form</u> code • <u>Location</u> • <u>Floor</u> Location • <u>Process</u> (for example: **Missing**) • <u>Stats Code</u>

PARAMETERS

Supervisor

Installation: Catalogue Defaults

It is possible for *Amlib* to use certain MARC tags (for example: **020 | ISBN**) for duplicate checking purposes. This is especially important when *importing* records (where a lack of matching can result in unwanted duplicate records).

1. Launch the *Amlib* client

2. Go to **Main** > **Supervisor** > **Installation** – the Installation (DEFAULT) screen will display

3. Select the **Catalogue** tab:

4. Type the desired settings into the Value column (see the following list for parameters to adjust)

5. Click the **F3 Save** button when complete

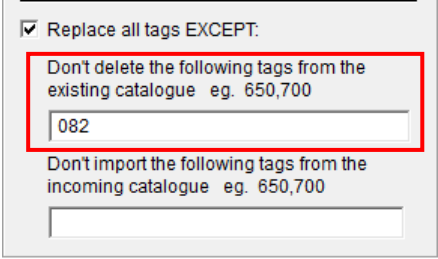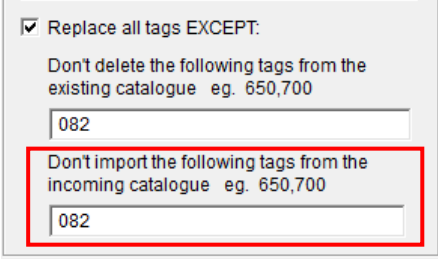6. Exit and restart the *Amlib* client for these settings to take effect

FIELD	EXPLANATION		EXAMPLE
A Marc record exists if one of the following tags match (Found in **DEFAULT** screen only)	A check is made for existing data matching the Tag numbers entered with the importing data. **Note**: ISBN has 2 modes when dealing with Multiple ISBNs. If the **020** Tag is included, Amlib will look at all the ISBN's within an incoming record and match as required		**001 020 022**
	Match any: Enter only one ISBN Tag No in the <u>Value</u> column	The ISBN/s of the existing record must match one of the multiple ISBN's within the incoming record for it to be considered existing – for example: when the Import file has 2 ISBNs and the existing Catalogue has only 1 (or more) a match will occur if at least one ISBN matches	**001 020 022**
	Match exact: Enter the number of **020**s to match the incoming with the existing	The ISBN/s of the existing record must match with the same number of (multiple) ISBN's entered here. If ALL the ISBNs match with those in the incoming record, it will be considered existing The record from the input file with multiple ISBN's must match ALL the existing catalogue ISBN's (for example: **001 020 020**), so if the incoming record has 2 ISBNs a match with an existing record will take place only if BOTH ISBNs match	**001 020 020 022**
Allow Catalogues to be restricted from viewing in NetOpacs (Y/N)	N	The <u>Opac View Restriction (Y/N)</u> default within the <u>Catalog</u> screen will be set to **N** and the checkbox *cannot* be edited	**Y**
	Y	The <u>Opac View Restriction (Y/N)</u> default within the <u>Catalog</u> screen will be set to **N** but the checkbox *can* be edited	
Allow tags to be sequenced anywhere within a Catalogue (Y/N)	N	The Marc Tags in the Display section of <u>Catalog</u> screen can only be moved within the Tag No and not anywhere else. The Arrows will be *inactive* once the end of the section is reached	If set to **N**, the order of the Tags in a particular section (the example: **650**), can be altered but not beyond the **650** section. If set to **Y**, the order of the Tags can be set anywhere on the display – for example: a **650** Tag could display above the **020** Tag.
	Y	The Marc Tags in the Display section of <u>Catalog</u> screen can be moved anywhere in the record. The Arrows will be *active* to move to any Tag sequence	
Automatically 'Show' the Catalogue details after a Search (Y/N)	Y	When the <u>Catalog</u> screen displays: always display the full Bibliographic data for the Catalogue record, rather than the User clicking the **Show** button on the Screen	**Y**
	N	When the <u>Catalog</u> screen displays: the User will need to click the **Show** button or choose **Catalogue** > **ShowAsDefault** from the <u>Catalog</u> menu, to display the full Bibliographic data for the Catalogue record	

Automatically 'Tick' the Worksheet button in Catalogue Create (Y/N)	Y	Set the Default to have the Worksheet displayed for Catalogue creation	Y
	N	The Default is not set to Worksheet and the user may click the Worksheet button if it is required	
Catalogue deletion level (1-4) (1=least severe, …, 4=most severe)	*When catalogues are deleted, all the Non-Authorities are automatically deleted. The levels below only apply to the Authorities that were attached to the Catalogue that is to be deleted.* Levels **1**, **3** and **4** also delete the non-preferred Authority if the preferred authority is not attached to a catalogue. Level 1 does this because a unique authority should not have anything seeing it.		1
	Level 1: (Least SEVERE) The Authority will only be deleted if it is: • Not attached to any other Catalogue • A unique Authority **Level 2**: The Authority won't be deleted if it: • Is attached to any other Catalogue record • Is *Seen By* another Authority • Has a *See Also* reference to another Authority • Is *Seen Also By* another Authority **Level 3**: The Authority won't be deleted if it: • Is attached to any other Catalogue record • Has a *See Also* reference to another Authority that is attached any other Catalogue record • Is *Seen Also By* another Authority that is attached to any other Catalogue **Level 4**: (Most SEVERE) The Authority won't be deleted if it: • Is attached to any other Catalogue		
Default for catalogue Opac Restrict (Y/N)	Enable the Catalogue Restriction for the *OPAC* (as opposed to *NetOpacs*) to be set. Most sites would set this to **N**		N
Display Tag Description in Catalogue instead of Tag No	Y	Displays a Description rather than a Marc Tag number – for example: **Topical Subject Heading** The Descriptions are set in **Main** > **Authorities** > **MarcTags**	N
	N	Displays the Marc Tag number – for example: **650**	

Enter % to adjust price on item on Marc Import (eg 10 = +10%)	The percentage entered will be the default price adjustment in the <u>Bibliographic Option</u> screen during the Marc Import. This allows for the <u>Item Price</u> during Marc Import to be appreciated automatically. For example: to allow for GST. This default can be overridden within the <u>Bibliographic Option</u> screen if required	**10** (defaults to: **+10%**)
MarcImport Replace: don't delete these tags from the existing cat (Found in **DEFAULT** screen only)	During the Marc Import, sets the default for the <u>Bibliographic Option</u> screen – identifying Tags that are not to be replaced: • Does not delete the existing data from the specified Tag(s): the Tag is automatically placed in the <u>Don't delete…</u> field box • Does import the new data for all other Tags (deleting any existing data) 	**Y**
MarcImport Replace: don't import these tags from the incoming cat (Found in **DEFAULT** screen only)	During the Marc Import, sets the default for the <u>Bibliographic Option</u> screen – identifying Tags that are not to be replaced: • *Does not* import the new data for the specified Tag(s): the Tag is automatically placed in the <u>Don't import…</u> field box • Does import the new data for all other Tags 	**N**
Only match an AOL record if the incoming record has the same location	For Advanced Order Records (W.A. State Government of Western Australia data only). Will only match an AOL record from an exchange if the AOL has the same location as the incoming record	**Y**
Replace an Order if one of the following tags match an Order No	The system compares the Order Numbers on an incoming exchange and replaces the existing data only if the Order Numbers are matched to the data in the specified Tags	**001 035**

Round the price of all imported Stockitem to: (ie 0.05 = 5 cents) (Found in **DEFAULT** screen only)	When importing Stockitem records with prices, the Item Current cost and the Original Cost (if new items), are to be rounded to the amount set in this parameter	0.05
Tag to be formatted as an ISBN (Found in **DEFAULT** screen only)	ISBNs and ISSNs are usually formatted with – separators between the numbers. The actual formatting depends on a number of rules and is based on the starting numbers in a group.	020
Tag to be formatted as an ISSN (Found in **DEFAULT** screen only)		022
Tag to be used as the AOL Order No (Found in **DEFAULT** screen only)	(WA State government sites only) When AOL files are processed the system will generate an order number based on the contents of the Tag Number field defined in this parameter.	001
Tags using the first indicator as the number of chars to ignore (Found in **DEFAULT** screen only)	For filing, the first indicator displays a number of characters to ignore – for example: "**the**" would have a second indicator of **4**	730 740
Tags using the second indicator as the number of chars to ignore (Found in **DEFAULT** screen only)	For filing, the second indicator displays a number of characters to ignore – for example: "**the**" would have a second indicator of **4**	240 245 440 490 745 840
Use the (L)ogin group or (C)atalogue group for the group code of new non-authority tags?	The Library Group code used when inserting Non-Authority tags would usually be the same as the Catalogue Group code. However, there may be instances where libraries may want the option of using the Login ILcation's Group code	**C** (Default)

Installation: Stockitem Defaults

The setting for this is contained in the Installation settings:

1. Launch the *Amlib* client

2. Go to **Main** > **Supervisor** > **Installation** – the Installation (DEFAULT) screen will display

3. Select the **Stockitem** tab:

4. Type the desired setting into the Value column (see the following list for parameters to adjust)

5. Click the **F3 Save** button when complete

6. Exit and restart the *Amlib* client for these settings to take effect

User Security: Modify a Shared Authority in the Catalogue Screen

The *Catalogue* module **Modify** button can be used to update any MARC tag in a Catalogue record including Shared Authorities. This has the potential to allow a user to unknowingly alter other records also using that Shared Authority.

For this reason, we recommend setting the **Modify** button to be *greyed* out if a Shared Authority is selected. This help ensures the integrity of the Shared Authorities by making them only editable in the *Authorities* module.

1. Launch the *Amlib* client

2. Go to **Main** > **Supervisor** > **UserNames** – the User Names screen will display:

3. Select a **User Name** in the table and click the **F8 Choose** button – the User Security screen will display:

4. From the main User Security menu, select **ActualMainMenu** > **Catalogues** > **Catalogue – NoSharedAuthUpdate**

5. Menu Chosen display should now be: **Catalogue.NoAuthUpdate**

6. Click the green **Give** button to DISABLE the Users ability to modify a Shared Authority in the Catalogue module

7. Close the User Security screen by clicking on the red **[X]**

8. Exit and restart the *Amlib* client for these settings to take effect

All Modules: Saved Files

1. Launch the *Amlib* client

2. Go to **Main** > **Supervisor** > **Installation** – the Installation (DEFAULT) screen will display

3. Select the Other tab:

4. Apply security to all Saved Files (Y/N) can be set for all saved files in any module that has this function available. If this is set to **N** (for **No**) when saved files are viewed, the screen displays as shown:

If the parameter value is **Y** (for **Yes**) this allows the operator to stipulate whether other operators are able to access this file when the file is being created. The operator who created this file can also modify the column at a later time. When other operators select to view another operator's files, only the ones with a **Y** (for **Yes**) in the Allow other operators to access this file (Y/N) column will be displayed:

In the example above, the Apply security to all Saved Files (Y/N) parameter has been set to **Y** (for **Yes**). The operator Lucy has seven (7) Saved Files created in the *Catalogue* module, four (4) of which have had the Allow other operators to access this file (Y/N) column set to **N** (for **No**).

When another operator views her files they will only see for (4) displayed:

5. Change the setting as desired and click the **F3 Save** button

6. Exit and restart the *Amlib* client for these settings to take effect

This setting can also be set by Individual Location.

MANUAL CATALOGUING

It is a good idea to search for a Catalogue to see if the item has been entered already, and just needs an Item attached. Searching for an Item can be done in Catalogue using the ISBN or in Stockitem (for example: Author or Title Search). The ISBN can even be wanded if the Barcode reader has been ISBN enabled.
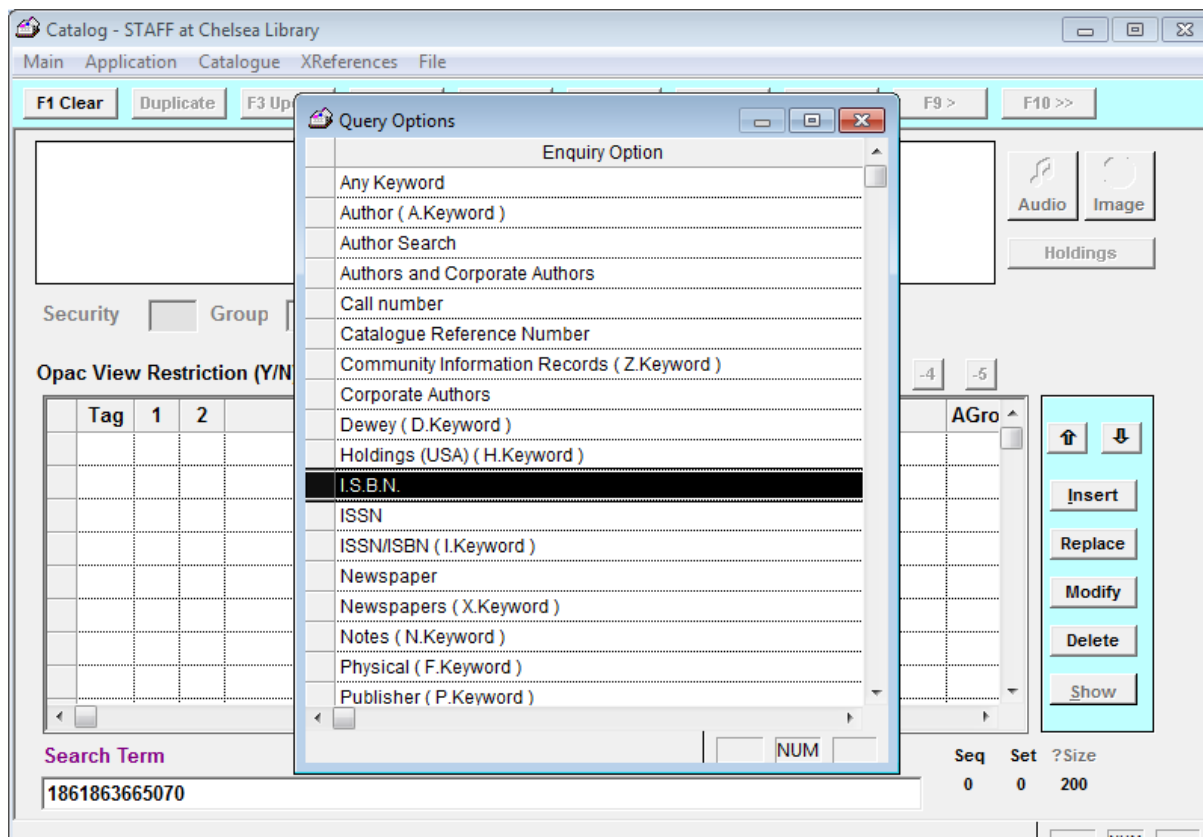
It is preferable to create a catalogue first and then create the holding record (Stockitem). If the Stockitem is processed first, not all the Tags are made when the Catalogue is created from the Item menu. For example: Subject Headings are not transferred across.

Keywords are created through association with MARC tags – for example: a Subject keyword would apply to all tags defined from **600** through to **699**: e.g. **Topical term (650), Personal name (600), Geographic (651)** etc. Therefore when creating your entry, it is important to have a Catalogue record as well as a Stockitem because keyword searching will be important.

There are three manual entry methods available:

1. **Work Sheet Method**

   After choosing a template related to the form of the data (for example: fiction/non-fiction etc.) the required fields can be filled in. Authority listings can be accessed when appropriate (for example: for standard entry of Authors, Subjects, Publishers etc).

2. **Editing existing records**

It is possible to duplicate an existing record and alter the relevant data.

3. New record from scratch

No Lead Through method. Tags can be inserted and built up to create a full record.

Please Note: Before beginning to use the Worksheet manual entry, you need to check the tags that will be automatically displayed. This is done in **Main** > **Catalogue** > **CatLeadThruSets**.

Work Sheet Method

1. Launch the *Amlib* client

2. Go to **Main** > **Catalogue** > **Catalogue** (or the [icon] icon) – the <u>Catalog</u> screen will display:
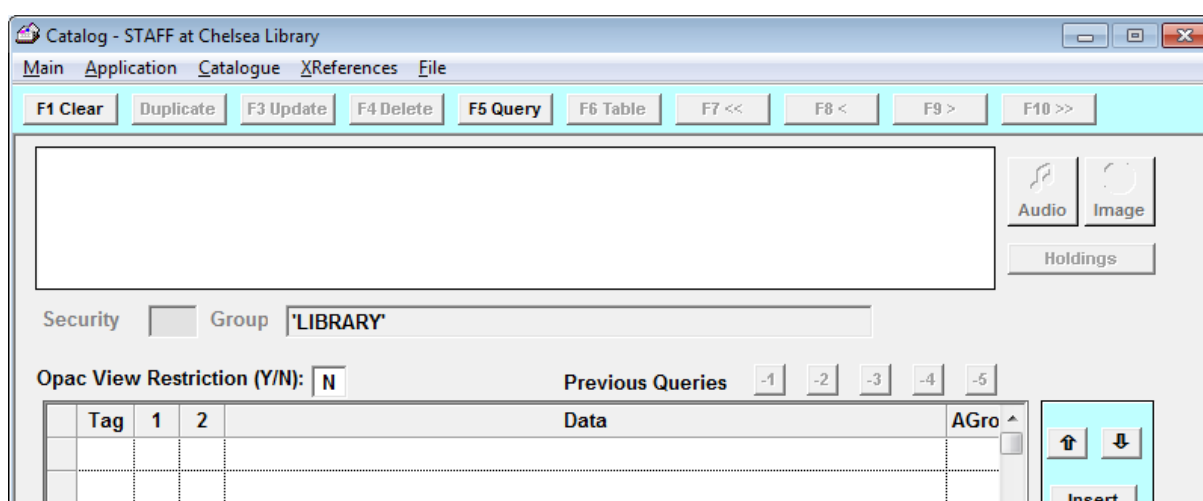
3. From the menu, select **Catalogue** > **Catalog Create** – the <u>Select Template</u> prompt will display:

4. Click on the button for an appropriate <u>Lead Thru</u> set – for example: **Fiction** – the <u>Work Sheet</u> will open with a number of preset MARC tags already displayed:

---
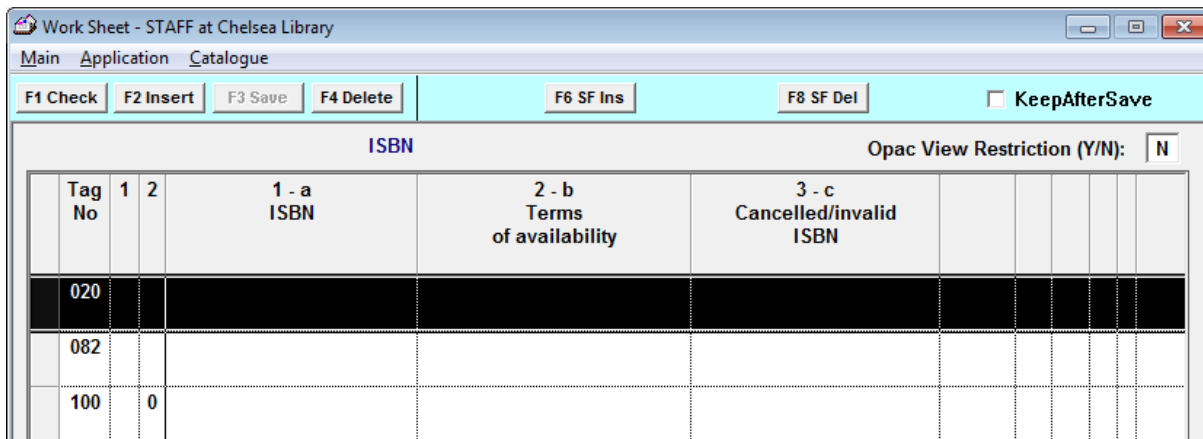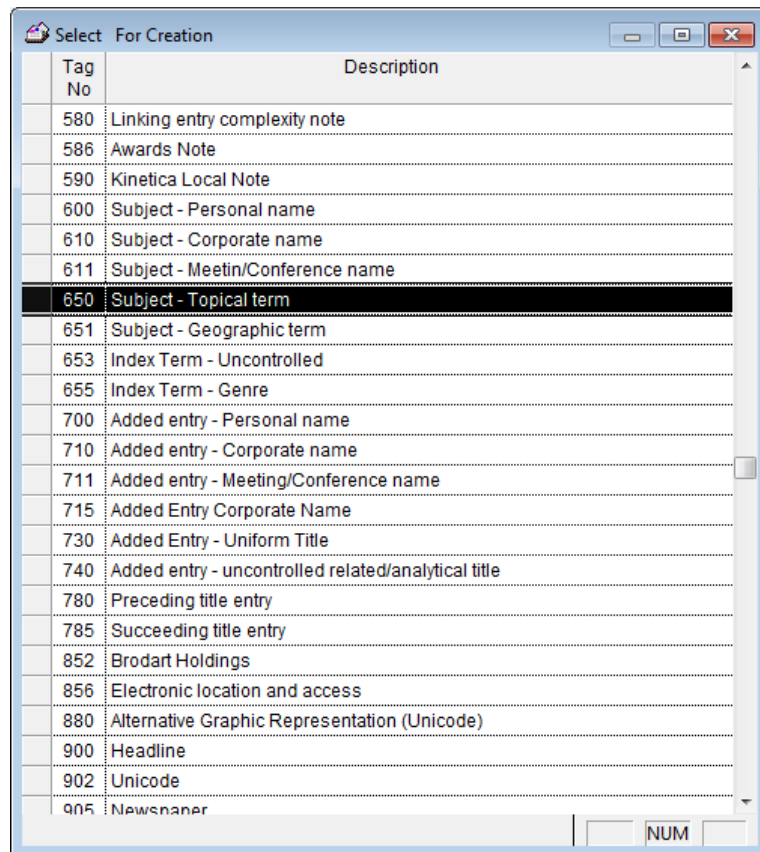
5. An item's bibliographic details can now be entered – as you move through the Work Sheet, the headings (descriptors) change, so it is possible to observe the type of data required in the subfield of the tag

   o See: Appendix 7: USMARC: Some Common Tags for more information

6. Where the data is Authority based (for example: Author, Subject Heading, Series, etc.) a listing of Authorities can be viewed and selected – for example: to search for a particular Author, type the first few letters of the surname, highlight the row and double-click the row or press the **F1 Check** button
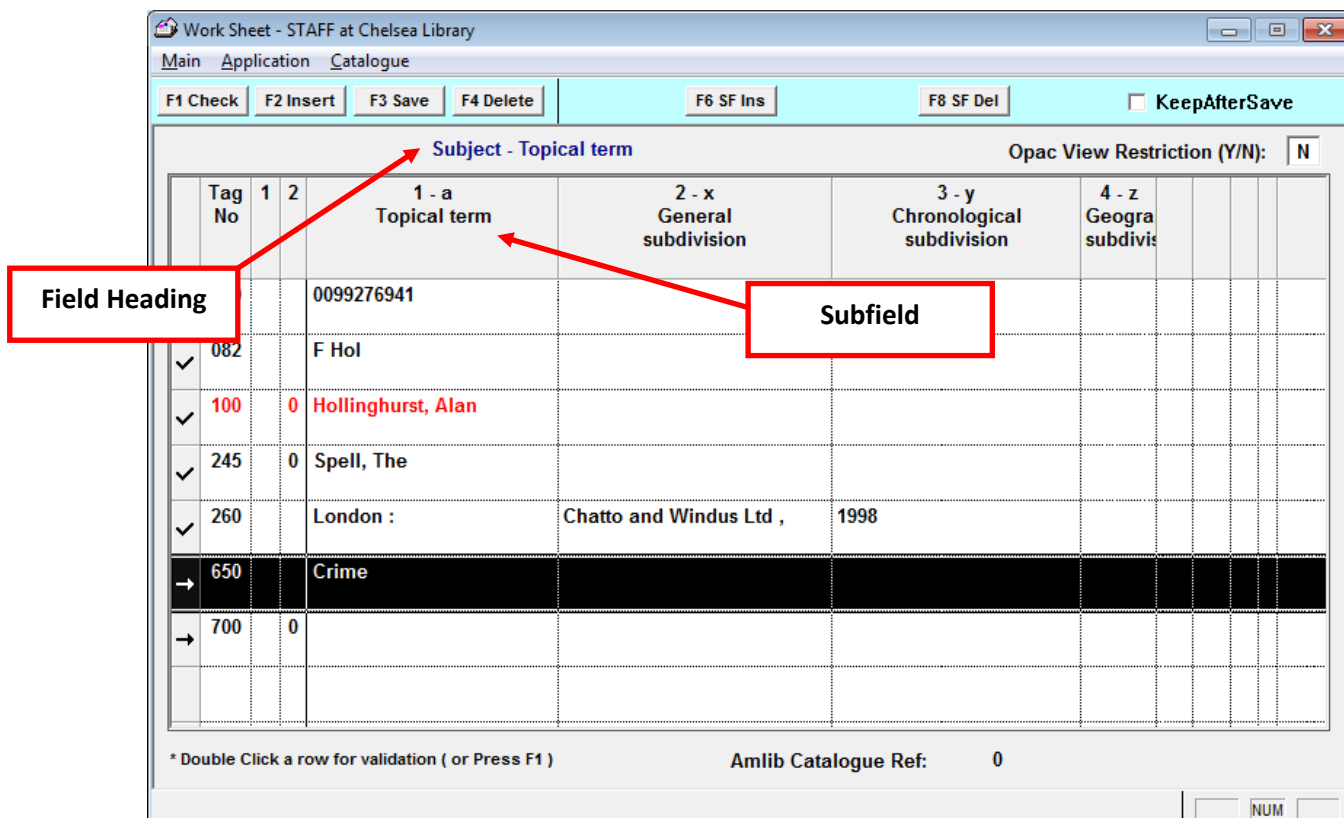
7. The Existing Authority Options screen will open displaying all matching Authorities and the number of Catalogue records which use each Authority:

8. To select an Authority in the table, simply double-click on it: the contents of the tag being checked will then change to match the selected Authority (the text will also change colour from black to **green**)

↓

9. Once selected (or if there is no matching Authority), click on the red **[X]** to close the selection table (if there were no Authorities found the contents of the tag being checked will turn **red**, if there were Authorities found but none were selected the contents will turn **pink**)

10. To enter additional tags, click the **F2 Insert** button – the <u>Select For Creation</u> table will open (the preset tags allow for up to 40 entries):

11. Find the required tag and double-click it to select it – a new entry with the selected <u>Tag No</u> will appear in the Work Sheet

12. When the record is complete, click the **F3 Save** button

13. If new Authorities are to be created, a prompt with the following message will display: **Some new Authorities will be created. Continue with Save?** (the new Authorities will be highlighted in **red**, so you can check them)
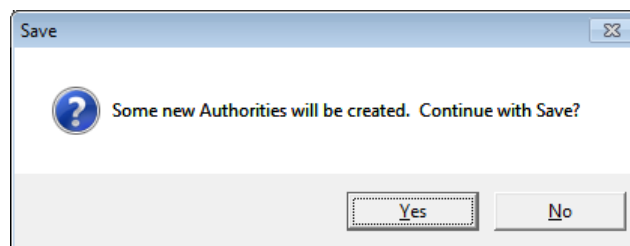
14. Click the **Yes** button – the <u>Created Catalogue – Select Next Action</u> prompt will display:
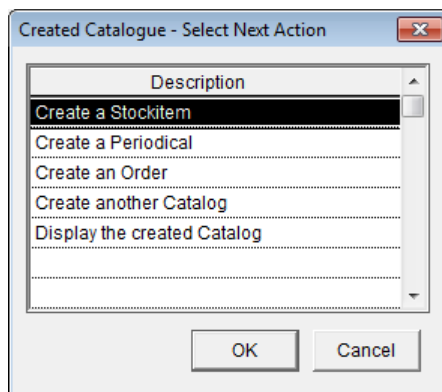
15. If you intend to create your holdings immediately, then highlight the **Create a Stockitem** and click the **OK** button (alternatively you can select the **Display the created Catalogue** if you wish to review the actual Catalogue record)

<u>Adding Stockitems</u>

This section continues from the section above. If you don't immediately choose to create a stockitem record, you can select **XReferences** > **StockItems** from the <u>Catalog</u> menu to initiate the process.

1. A prompt with the following message will display: **No Stockitems exist for the Catalogue. Do you wish to create a new Item?**
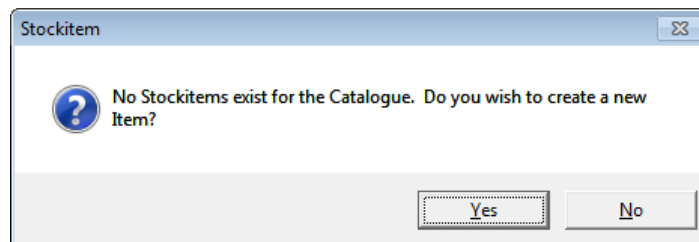
2. Click on the **Yes** button – a <u>New Stockitem</u> prompt will display with the following message: **Please choose a Form Type for the new Stockitem**
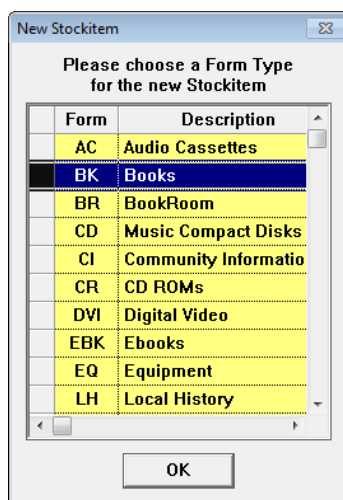
3. Choose the appropriate <u>Form</u> type and click on the **OK** button – the <u>Stockitem</u> main screen will enter creation mode (the **F2 Insert** button will appear bolded) and a number of fields will be pre-populated:

4. Complete the other fields as required – for example: **St**a**ts Code**, **Current Cost**, **Floor** location, etc – to access a list of codes in a field press **.<Tab>**

   For example: in the **St**a**ts Code** field, pressing **.<Tab>** will display a list of your Stats <u>Codes</u> and <u>Description</u>s – double-click on an entry to select it:
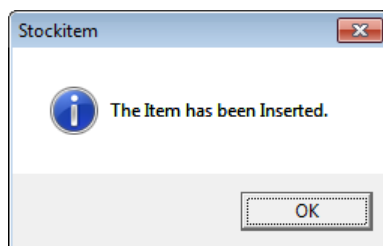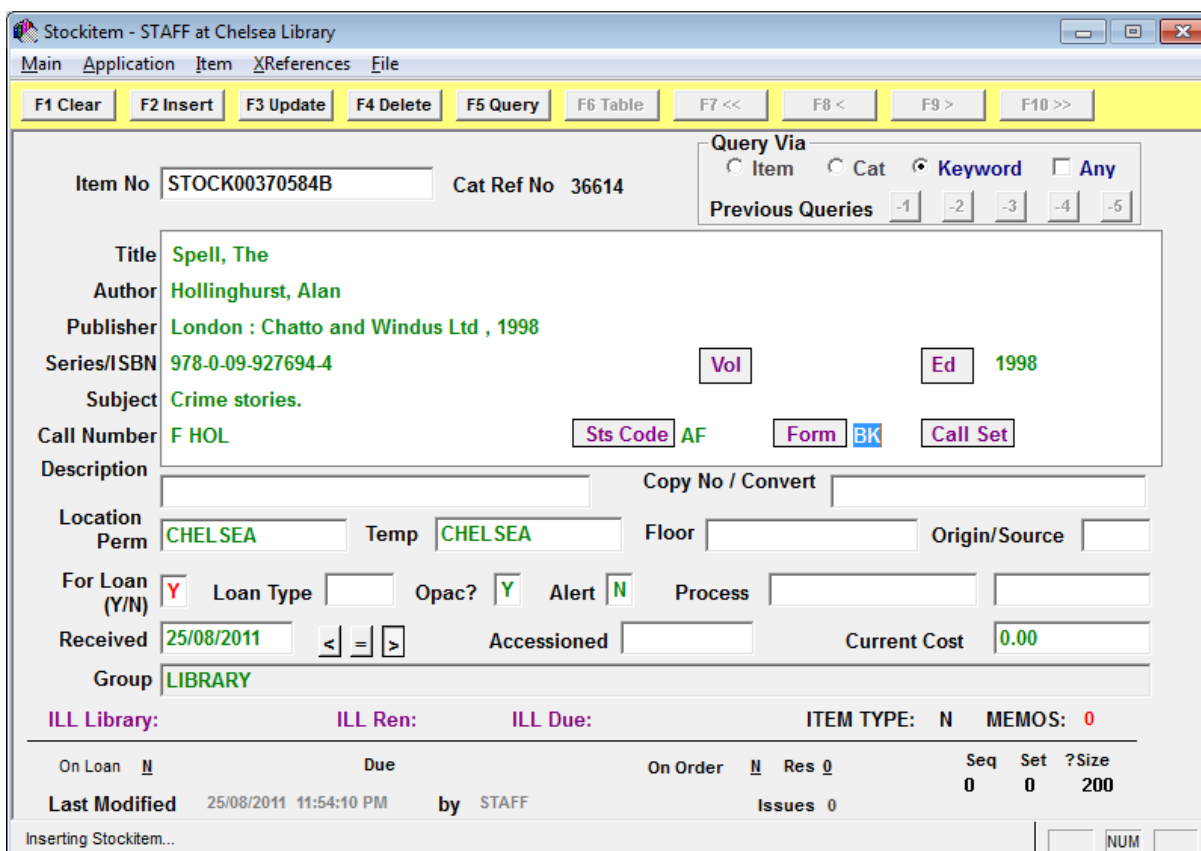
5. Scan in **barcode** in the <u>Item No</u> field (if you wish to create a system-generated barcode, leave this field blank)

6. Click on the **F2 Insert** button when complete – a prompt with the following message will display: **The Item has been Inserted.**

7. Click the **OK** button

<u>Multiple Copies</u>

To enter multiple copies of the same catalogue item:

1. Scan in a new barcode into the <u>Item No</u> field – the **F2 Insert** button will once again become active (**bolded**)

2. Change any other details as required – for example: <u>Stats Code</u>, <u>Copy No</u> and <u>Floor</u> location

3. Click the **F2 Insert** button when complete

IMPORTING NEW ITEMS

Most sites download their Catalogue data (from places like *SLOWA* and *SCIS*). *Amlib* stores the data in **USMARC** format, which is now the international standard. This is made up of hundreds of MARC Tags, which identify data. In the same way that Dewey numbers become familiar, common tags become known.

SOME COMMON TAGS	DESCRIPTION
020	ISBN
082	Dewey classification number
100	Personal name main entry (usually author)
245	Main title
260	Publication information
300	Physical description
440	Series
500	General notes
520	Summary
650	Subject headings (Topical)
700	Personal name (Added entry)
856	Electronic location and access (URL)

Import MARC Catalogue Data

There are generally four main stages in the download process.

DATA
Download ed from SCIS or sent from SLOWA

➤

HOLDING FILE
Loads the data to the Screen for checking

➤

UPDATE
[F3] *begins the updating process after setting the defaults*

➤

NEW RECORDS
Check the new data

- *Stockitems: adding barcodes, supplier, checking location etc. to items in file*
- *Catalogues*
- *Authorities*
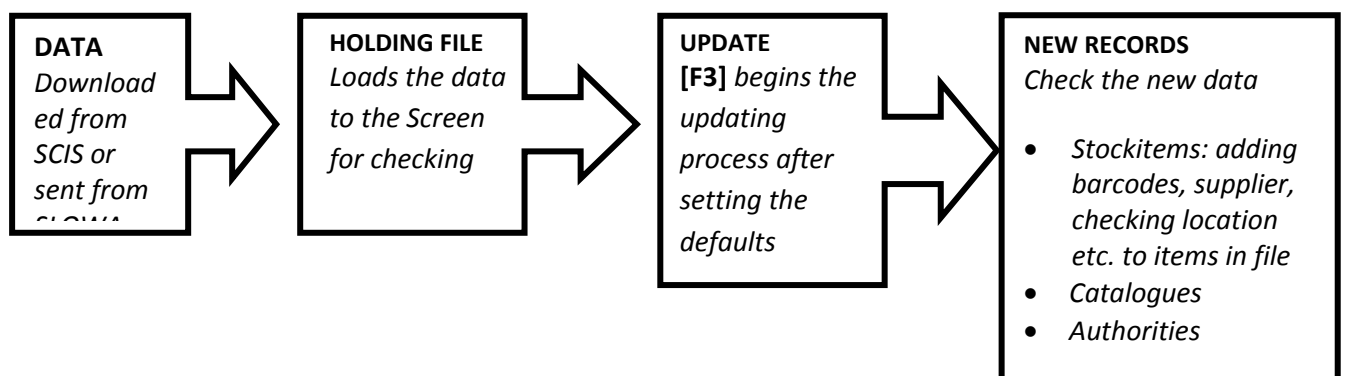
Accessing the Data for the Download

1. Launch the *Amlib* client

2. Go to **Main** > **Authorities** > **MarcTakeUp** (alternatively use **Ctrl + M**) – the Marc Import screen will display:
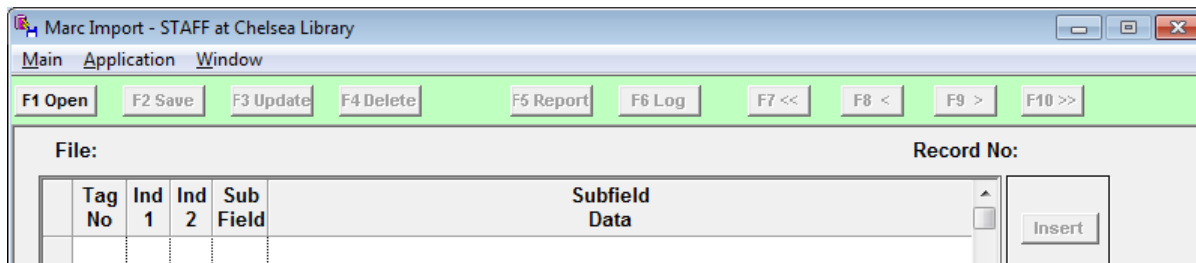
3. Click the **F1 Open** button to display the Open dialogue box

4. Locate the file to be processed by using the Look in: drop-down box – for example: if the file is on the C: drive, the Look in: box may say **Local Disk (C:)**

5. Once the file name has been located, use your mouse to select it and click on the **Open** button

There are two processing options: Bibliographic Data or Authority Data – this guide covers the import of Bibliographic Data.

Bibliographic Data
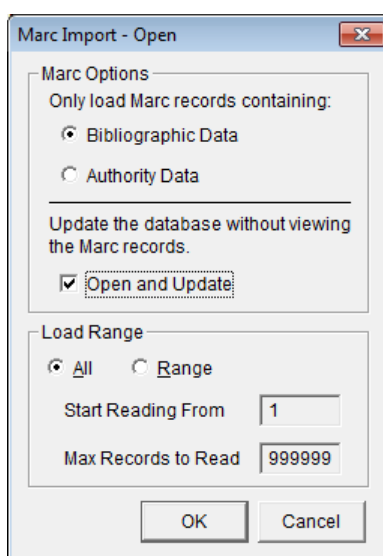
This option is to load records which are Bibliographic Data in machine readable format which can be imported into *Catalogue*, *Authority* and *Stockitem* (where appropriate) applications of *Amlib*.

1. The Marc Import – Open screen will display:

Please Note: If the Import file (*Bibliographic* or *Authority*) contains more than 9999 records, it is recommended that Open and Update is selected (ticked) so that all records can be loaded into the

database. This eliminates the need to load in sections. The maximum records that can be viewed in the Holding file is 9999 records.

HEADING	FIELD	EXPLANATION/OPTIONS	EXAMPLE
Marc Options	Bibliographic Data	Bibliographic data to be created for the Catalogue.	Data from external source (for example: *SCIS*, *SLOWA*, *Kinetica* etc. with USMARC Tags)
	Authority Data	Authority data for creation or updating of Authority Headings and/or cross references.	**See** and **See Also** Update from SCIS or other source
Update the database without viewing the Marc records	Open and Update	If checked (**ticked**), the imported items will not display in the Holding file.	The *Catalogue* will be **Update**d immediately
		If unchecked (**unticked**), the imported items will display in the Holding file.	Review records

The *Catalogue* will not be updated until the **F3 Update** button is selected |
| **Load Range** | All | All records from the file are downloaded into a holding file. | All |
| | Range | Selected records from the file are downloaded into a holding file. If Range is selected, the next 2 fields have to be updated. | For example, 1 to 50 |

2. Complete the options using the above table:

   a. Marc Options = **Bibliographic Data**

   b. Open and Update = **ticked**, unless you want to review each individual MARC record

   c. Load Range = **All** (unless the file sizes are quite large)

3. Click on the **OK** button

Bibliographic Options

1. The Bibliographic Options screen will display:

HEADING	FIELD	EXPLANATION/OPTIONS	EXAMPLE
Marc Details	We think the file contains	The data type is displayed Standard format	**SCIS** **ABN**
	Total Bibliographic records	The number of Bibliographic records will display	**32**
	Total Authority records (this will only display if the import is for Authority headings)	The number of Authority headings with See/See Also references will display	**0**

2. Select the appropriate <u>Each bibliographic record contains</u> setting:

Each Bibliographic record contains:	Catalogue data only	The system will determine the contents of the import file. If only Catalogue data exists in the file, this will be the Default option.	SCIS Data
	Full Catalogue & Stockitem data	The system will determine the contents of the import file. If both Catalogue and Stockitem data exists in the file, this will be the Default option. Please Note: This item can be selected to create "Dummy" Stockitems even though only Catalogue Data exists in the Import file.	SL OF WA Data
	Brief Catalogue and Order data	The system will determine the contents of the import file. If only brief Catalogue data and Order data exists in the file, this will be the default option.	AOL Data
When displaying the records show:	All tags in the file	All tags from the Import file will display in the Holding file for viewing. However, tags not defined in Amlib will not load into the Amlib Catalogue unless the Marc tag is defined.	If Tag 650v is not used in Amlib it WILL still display in the Holding file.
	Only tags defined in Amlib	Only tags used in Amlib will display in the Holding file.	If Tag 650v is not used in Amlib it will NOT display in the Holding file.

3. If the <u>Marc Details</u> are set to import **Full Catalogue & Stockitem data**, the <u>Item Default</u> and <u>Item Prices</u> sections will also display:

| HEADING	FIELD	EXPLANATION/OPTIONS	EXAMPLE
Item Defaults **Please specify default values for each item in the fields below**	Form	The default values set in the **Main > Supervisor > Installation > Stockitem** tab will display if defined. If these fields are not yet defined, codes which will apply to the items can be entered. Rules for automatic entries of Form and Stats codes depending on the Tags that are imported, and be set in <u>Cat Defs</u> in the Stockitem Form and Stats codes.	If during the Import, Cat definitions cannot be created, each Stockitem will have a default <u>Form</u> of **BK** (for example)
	Location		**CHELSEA**
	Lib Group		**LIBRARY**
	Stats Code		**ANF**
	Floor Loc (optional)		**DISPLAY**
	Process (optional)		**IN PROCESS**
Item Prices	Minimum price of an item	If the item price in the Import file is less than the price set here, enter the Minimum price	The Import price is **$8.00** but the Minimum price set here is **$10.00**, the price in the Stockitem will be **$10.00**
	Appreciate items by %	Items can be appreciated by a percentage – for example: GST of 10%	**10%**
	Depreciate old stockitems	Items to be depreciated will be dependent on the table set in **Stockitem > Application > Stats Group**	
	Use average prices if no price	Items will be given an average price, set in **Stockitem > Application > Stats Group**. If no price is entered in the Import File	

4. Click the **OK** button once you have completed modifying your settings

Please Note: <u>Form</u> and <u>Stats Code</u> defaults from the **Main > Supervisor > Installation > Stockitem** tab display automatically in the fields. If there are no defaults entered, the field will be blank. <u>Location</u> displays as the Login Location. Entry of these fields is optional. As the import of data is processed, the Stockitems will be given the default values if there are no catalogue definitions for the Form or Stats codes of the items. <u>Form</u> and <u>Stats Code</u> Cat definitions are found in **Main > StockItems > StockitemForms** or **StockitemStatsCodes** table for the particular code.

Reviewing Records to be Imported (Optional)

It is possible for the importer to review (and edit) the MARC data being imported.

1. If the importer has decided to review the records being imported (see Bibliographic Data step above), the Marc Import screen will display:
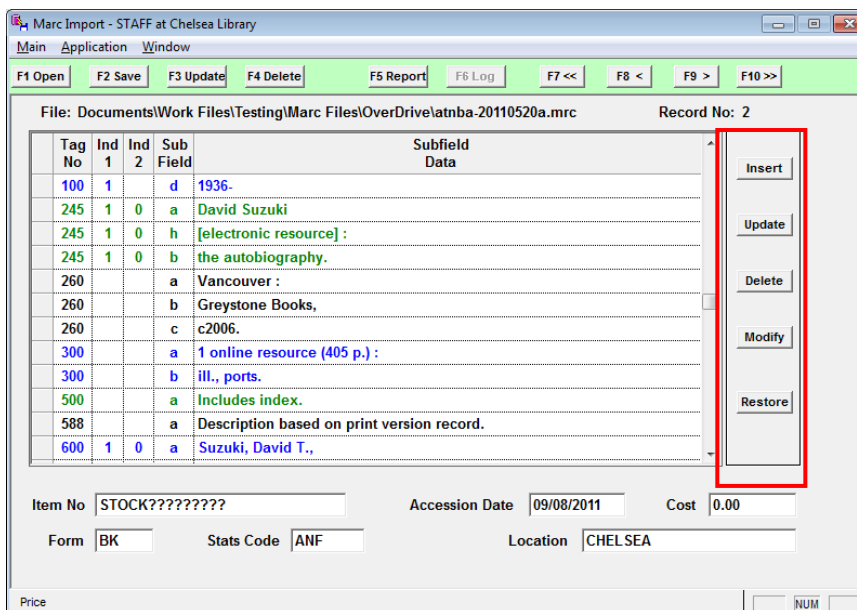
2. If you do wish to edit the data (prior to import), use the editing buttons on the right to change or delete the individual tags

   Please Note: Editing of the data prior to import is not essential. Changes can be made after the data has been imported into the Catalogue. Remember that not all the tags will necessarily be Imported, so if editing is considered necessary, change only the tags you know will be imported!

3. Use the **F7**, **F8**, **F9** and **F10** buttons to move between records

4. Once the data has been reviewed, click the **F3 Update** button

Find

It is possible to use the find function to locate any matching text, tag number or specific Subfield in the Holding File data being displayed. For example: use this facility to check all Author entries or Subject headings.
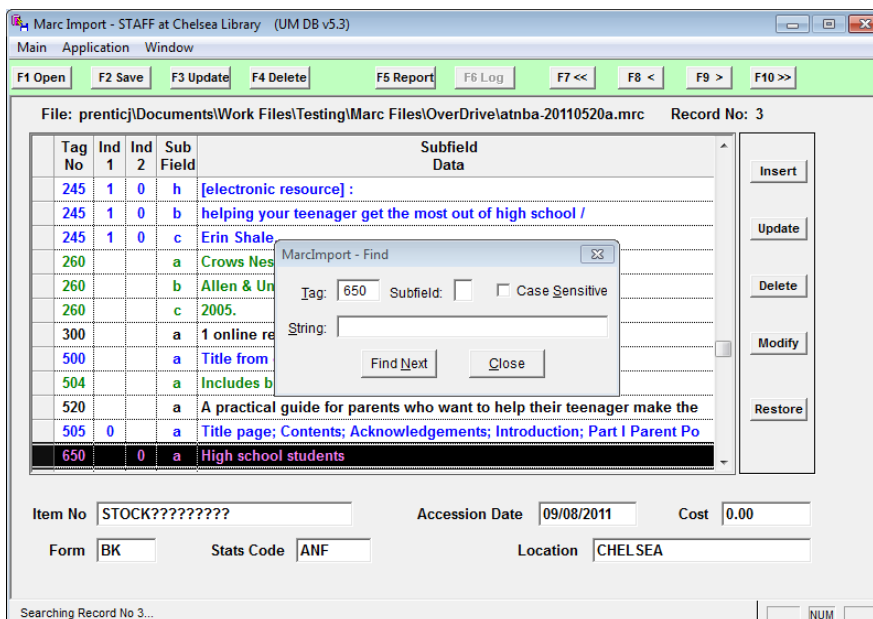
1. From the main menu, select **Window** > **Find** – the MarcImport - Find screen will display:
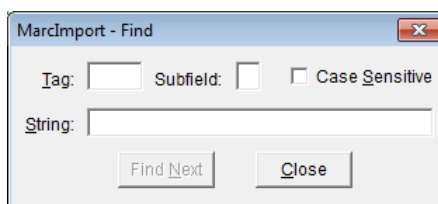
2. Type in the Tag, Subfield or String to find and click the **Find Next** button

3. It will then find any matching data in the record currently being displayed:

Catalogue Update Options

1. The Update Options screen will then display, allowing you to select the **Cat**(alogue) and (Stock)**Item Options**:

- Cat Options: When an incoming Catalogue is match with an existing Catalogue

- Item Options: When an existing Catalogue is replaced all existing items
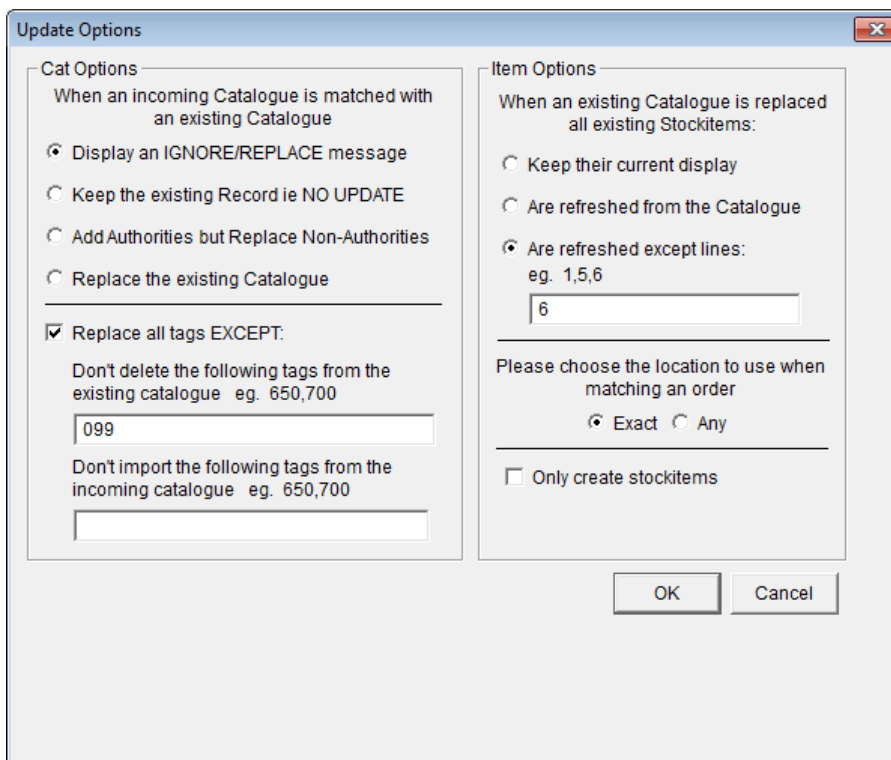
| PARAMETER	FIELD	EXPLANATION

Cat Options When an incoming Catalogue is matched with an existing Catalogue:	Display an IGNORE/REPLACE message	A message will display at each match occurs. At each match, the operator will get a choice to create a new catalog, replace the existing or to keep the existing details.
	Keep the existing Record ie NO UPDATE	No Update occurs for the Catalogue
	Add Authorities but Replace Non-Authorities	Does not replace existing Authorities but adds new Authorities to the record. However, it replaces any Non Authority data from the Import
	Replace the existing Catalogue ENTIRELY	All tags from the Import are used, overwriting any existing data

FIELD	OPTION	EXPLANATION
Replace all tags EXCEPT:	Don't delete the following tags from the existing catalogue eg. 650,700	This will vary according to the setting in **Main** > **Supervisor** > **Installation** > **Catalogue** tab: • MARCImport Replace: don't delete these tags from the existing cat • MARCImport Replace: don't import these tags from the existing cat Adds non-identical tags when importing all but specified Tags. Existing data in the specified Tags remains unchanged ☑ Replace all tags EXCEPT: Don't delete the following tags from the existing catalogue eg. 650,700 082 Don't import the following tags from the incoming catalogue eg. 650,700
	Don't import the following tags from the incoming catalogue eg. 650,700	Adds non-identical tags when importing. Does NOT import the new data in the specified Tags. Existing data in the specified Tags remains unchanged ☑ Replace all tags EXCEPT: Don't delete the following tags from the existing catalogue eg. 650,700 082 Don't import the following tags from the incoming catalogue eg. 650,700 082

PARAMETER	FIELD		EXPLANATION	
Item Options **When an existing Catalogue is replaced, all existing Stockitems:**	Keep their current display		No existing Stockitems are refreshed – they remain the same	
	Are refreshed from the Catalogue		All existing Stockitems are replaced by the new Catalogue details	
	Are refreshed except lines: eg. 1,5,6		Enter the line numbers to be retained – for example: **6** (Line 6, which is usually Call Number). Line numbers correspond to the 6 lines of Stockitem display (for example: Line 1 is usually Title, Line 2 Author etc.)	
	FIELD	**OPTION**	**EXPLANATION**	
	Please choose the location to use when matching an order	**Exact**	Only order items where location is the same as the current Amlib location will be candidates for replacement	
		Any	Stockitems on the file may replace any order item on the database	
	Only create stockitems	**Checked**	The import of data will result in **no** Catalogue records being created. Only Stockitems will be created.	
		Unchecked (Default)	Create Catalogue records as well as Stockitems	

2. Enter the options you would like, then click the **OK** button – the Saved Files screen will display:
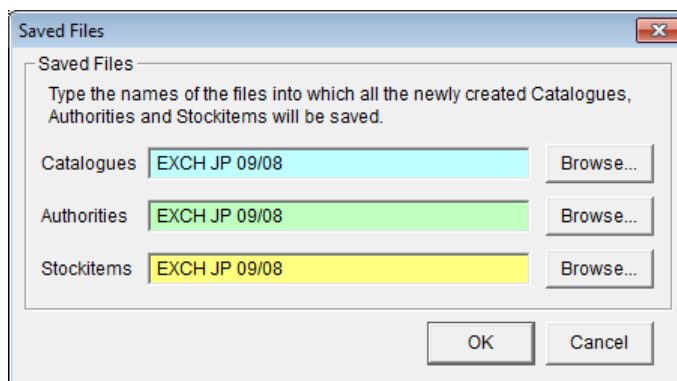
3. Type the names of the files into which all the newly created **Catalogues**, **Authorities** and/or **Stockitems** will be saved (if you do not want to check new items – for example: **Authorities**, do not enter a filename)

4. Click the **OK** button

HINT: These files assist in finding the newly created Catalogues, Authorities and/or Stockitems after the import. The Filenames are created so that you can identify the file later. A suggested Filename could be the type of data – for example: **SCIS** or **EXCHANGE**, the date and the initials of the staff member processing the data.

5. If confirmation of duplicate items has been requested in the parameters, a <u>Catalogue Match</u> screen will display every time a duplicate item is found:
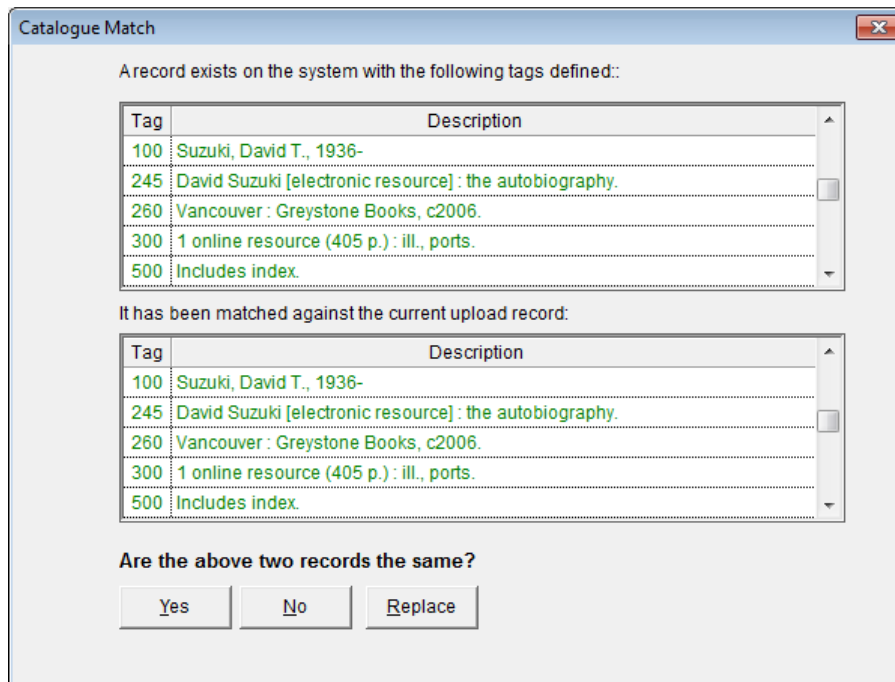
6. **Are the above two records the same?** Click the **Yes**, **No** or **Replace** button

OPTION	EXPLANATION
Yes	The catalogue entry that exists on the database will remain as displayed in the top box. A new Stockitem would need to be added if appropriate. The imported record will not be included in the New File created for Catalogue or Authorities
No	A new catalogue will be created with the data from the Imported data being used for the new catalogue record. The imported record will be included in the New File created for Catalogues or Authorities
Replace	The existing catalogue entry will remain but the data will be replaced with the data from the imported recorded. The imported record will not be included in the New File created for Catalogue but there may be some additions to the Authorities file

7. An <u>Update</u> prompt will display, indicating the progress of the import:
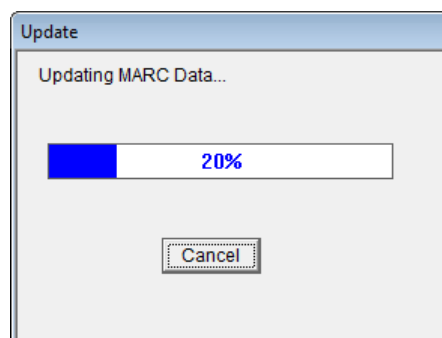
8. When the update is finished an <u>Update</u> prompt will display, showing the number of records Updated:

9. Click the **OK** button

10. You will be able to view the log by selecting the **F6 Log** button

F6 Marc Log

This log lists any errors that were experienced in the process of importing the file and also what action was taken with certain items. Most of the errors that display in the log are caused by the tag numbers not being defined on the Amlib database. This may be because we did not wish to use them in the Catalogue data but were present in the data file.

Checking New Stockitems

1. Launch the *Amlib* client

2. Go to **Main** > **StockItems** > **Stockitem** – the Stockitem screen will display

3. From the menu, select **File** > **DisplayFile** – the Stockitem Saved Query Results screen will display:

4. Highlight the file you wish to access and click the **F9 Select** button – a <u>Stockitem List</u> of the imported items will display:

5. You can now check to ensure that the item details are correct

6. Double-click the first entry – the selected item will display in the <u>Stockitem</u> screen

7. Add the correct <u>Item No</u> (barcode), <u>Current Cost</u>, <u>Sts Code</u>, <u>Form</u> code, <u>Origin/Source</u> (if required) and generally check other details

1. Add Barcode

2. Check Form and Stats codes

3. Check Location

4. Add Origin/Source (supplier) if required

5. Add correct price (do not add $ sign)

6. Add/remove any other relevant information

8. To access a list of codes in a field press **.<Tab>**

For example: in the **Stats Code** field, pressing **.<TAB>** will display a list of your Stats <u>Codes</u> and <u>Descriptions</u> – double-click on a entry to select it

9. Click on the **F3 Update** button when complete – a prompt with the following message will display: **The Item has been Updated.**
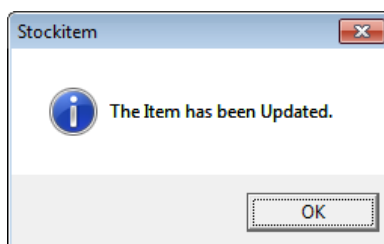
10. Click on the **OK** button

MODIFYING CATALOGUE DETAILS

1. Launch the *Amlib* client

2. Go to **Main** > **Catalogue** > **Catalogue** (or the [icon] icon) – the Catalog screen will display:

3. Initiate a **F5 Query** to locate the Catalogue record that requires editing (alternatively, if the item record is open in the Stockitem module, select **XReferences** > **Catalogue**)
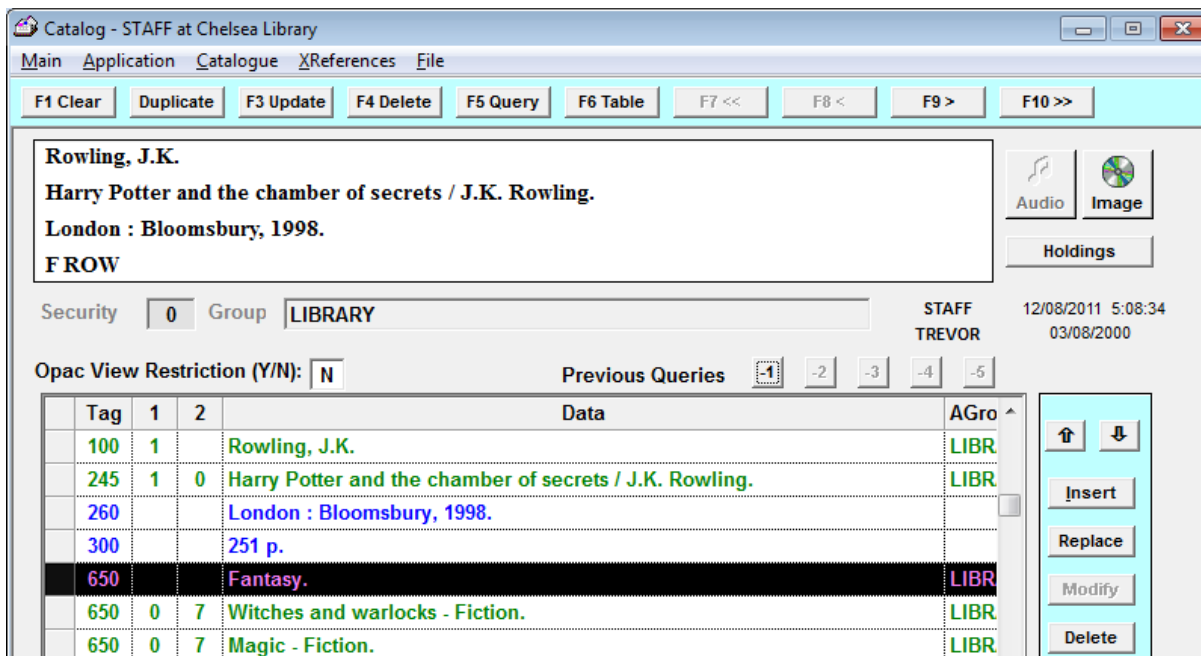
Modify Using the Work Sheet

It is now possible to edit an existing catalogue record using the Catalogue Work Sheet.

1. From the menu, select **Catalogue** > **Catalog Modify using Worksheet** – the Work Sheet screen will display:
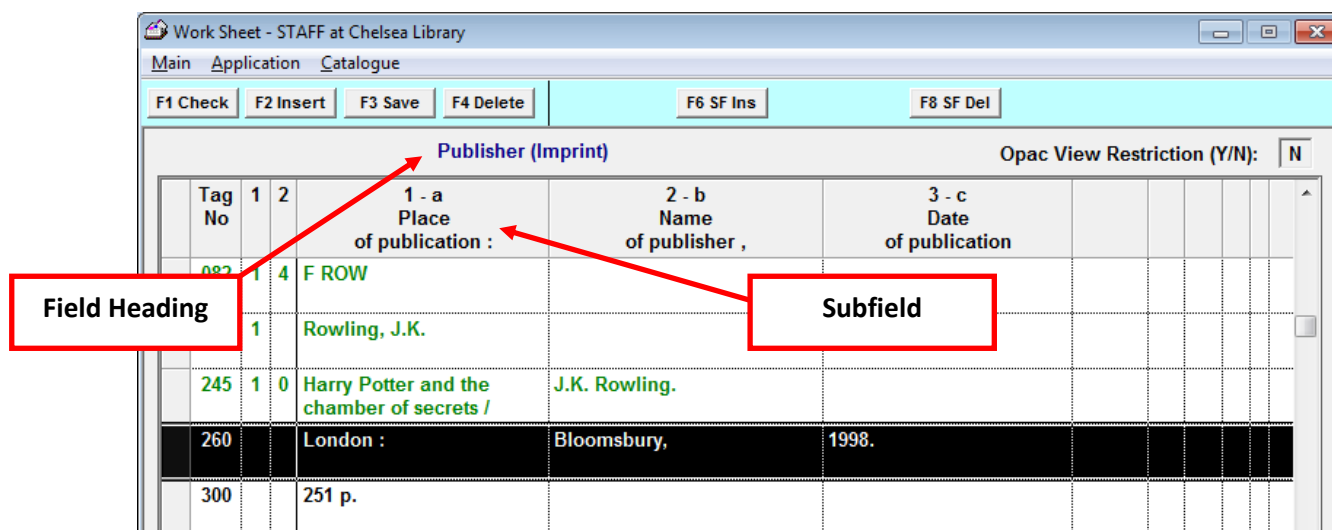
2. The catalogue record can then be edited/modified in the same manner as a new Catalogue record

3. Existing Authorities cannot be altered in the Work Sheet – if a new Authority is to be created (for example: one with a different subdivision), then the **F2 Insert** button should be used to enter it on a new line to that of the existing heading (the existing heading can be retained or removed using the **F4 Delete** button)

Insert

Inserts a new Tag for the Bibliographic record.

This process will be different depending on whether the Tag chosen from the list is an Authority or Non-Authority Tag.

1. Click the **Insert** button on the right-hand side of the screen – the <u>Select For Creation</u> table with a list of <u>Tag No</u>s will display:

2. Double-click on the desired Tag

<u>Insert Non Authority Tag</u>

1. If the selected Tag is a Non-Authority – the <u>SubFields</u> window will display:
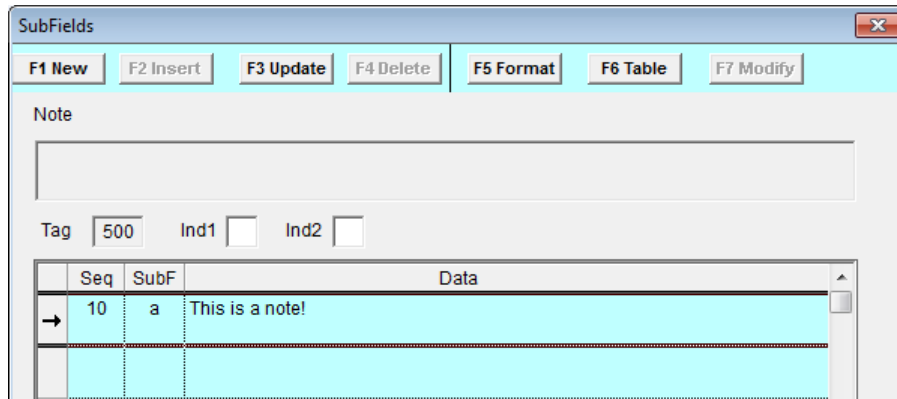
2. Please ensure you enter the correct data into the correct subfield – clicking the **F6 Table** button gives the <u>Valid SubFields/Parts</u> table available for that Tag:

3. Once the data has been correctly entered click the **F3 Update** button

<u>Insert an Authority Tag</u>
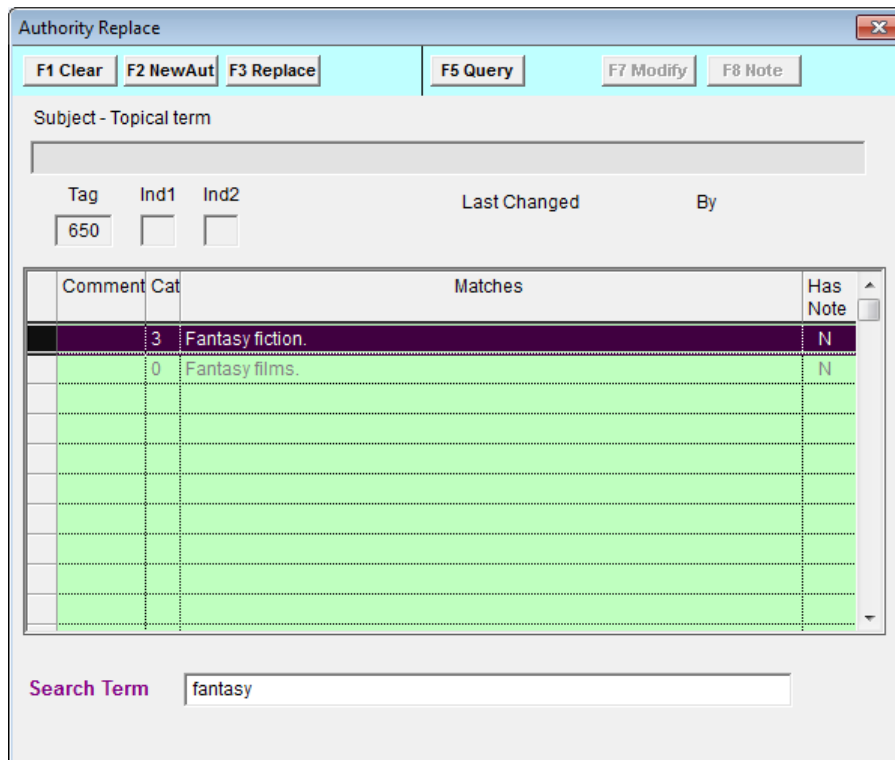
1. If the selected Tag is an Authority – the <u>Authority Replace</u> screen will display:
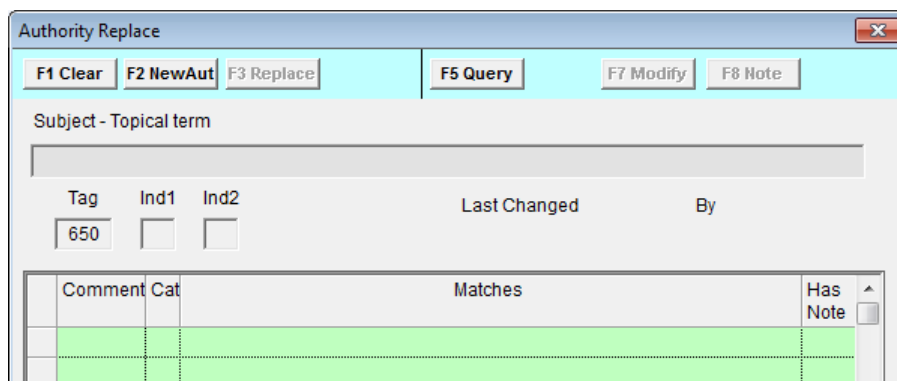
- Notice the Green colour of the list (in this example: a **650 - Subject Heading**)? This is because the headings shown come from the *Authority* module
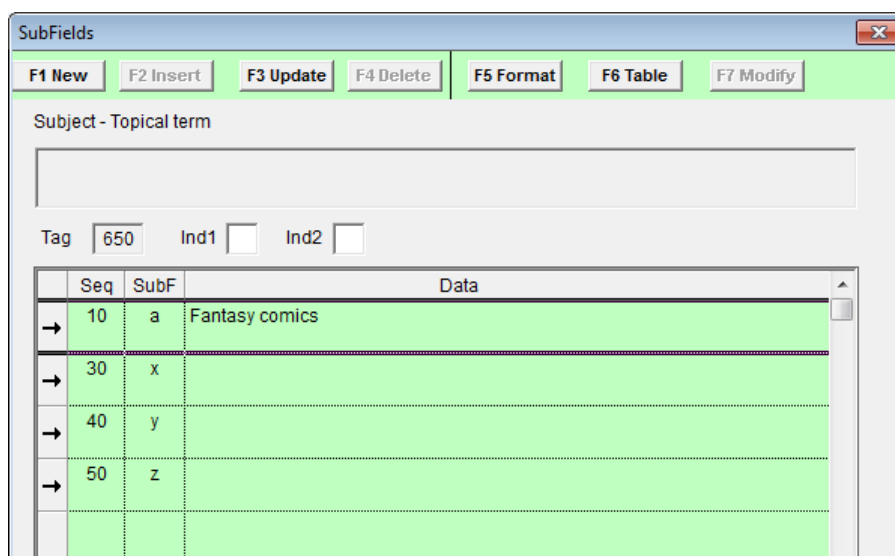
2. Type in a <u>Search Term</u> (for example: **Fantasy**) and click the **F5 Query** button – a list of matching terms will display:

3. If the correct term is in the list:

   a. Highlight the term and click the **F3 Replace** button

   b. The <u>Authority Replace</u> window will close and the selected Authority will appear in the catalogue record

4. If the correct term is NOT in the list or your search gives no results:

   a. Click the **F2 NewAut** button – the <u>SubFields</u> table will display:

b. Please ensure you enter the correct data into the correct subfield – clicking the **F6 Table** button gives the <u>Valid SubFields/Parts</u> table available for that Tag:

c. Once the data has been correctly entered click the **F3 Update** button

d. Click on the red **X** in top-tight corner to close the <u>Authority Replace</u> screen – the new Authority will have been added to the catalogue record:

Once the Authority has been entered, it is available for use in subsequent catalogue records.

Replace

Replaces the Tag data with an alternative heading.

1. Highlight an Authority to be replaced

2. Click the **Replace** button on the right-hand side of the screen – the Authority Replace table will display with highlighted Authority:

3. Type in a Search Term (for example: **Wizards**) and click the **F5 Query** button – a list of matching terms will display:

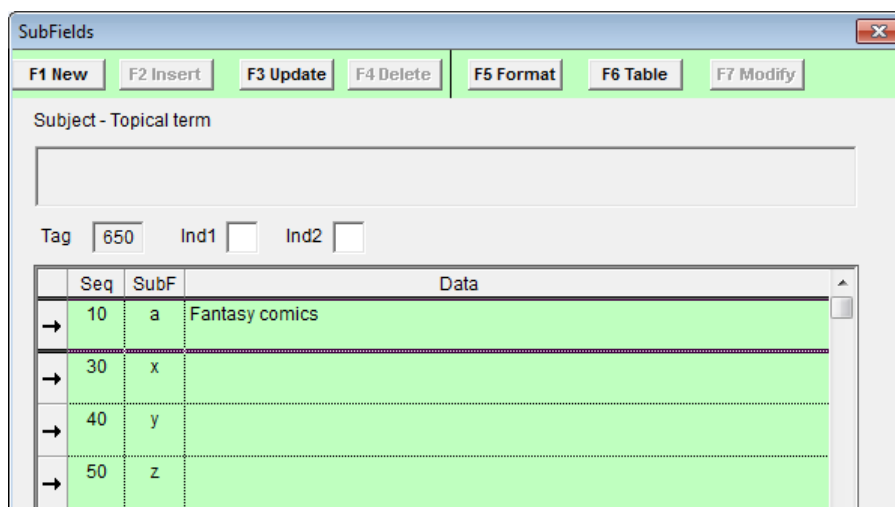4. If the correct term is in the list:

    a. Highlight the term and click the **F3 Replace** button

    b. The <u>Authority Replace</u> window will close and the selected Authority will appear in the catalogue record

5. If the correct term is NOT in the list or your search gives no results:

(**Please Note:** this option **NOT** available if User settings have been set to DISABLE modification of Authorities in the catalogue screen – the **Insert** button should be used to create a new Authority and the existing Authority removed from the record using the **Delete** button)
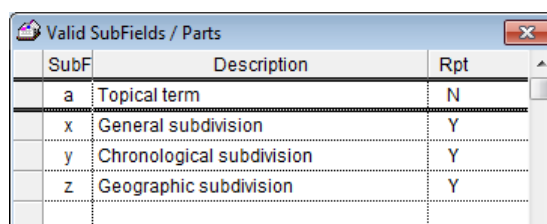
    a. Click the **F2 NewAut** button – a prompt with the following message may display: **Creating an Authority replaces the existing Authority. Continue?**
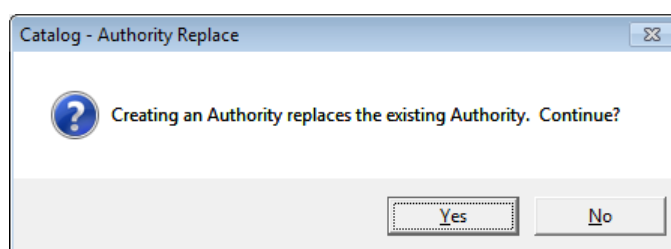
    b. Click on the **Yes** button – the <u>SubFields</u> table will display:

    c. Please ensure you enter the correct data into the correct subfield – clicking the **F6 Table** button gives the <u>Valid SubFields/Parts</u> table available for that Tag:
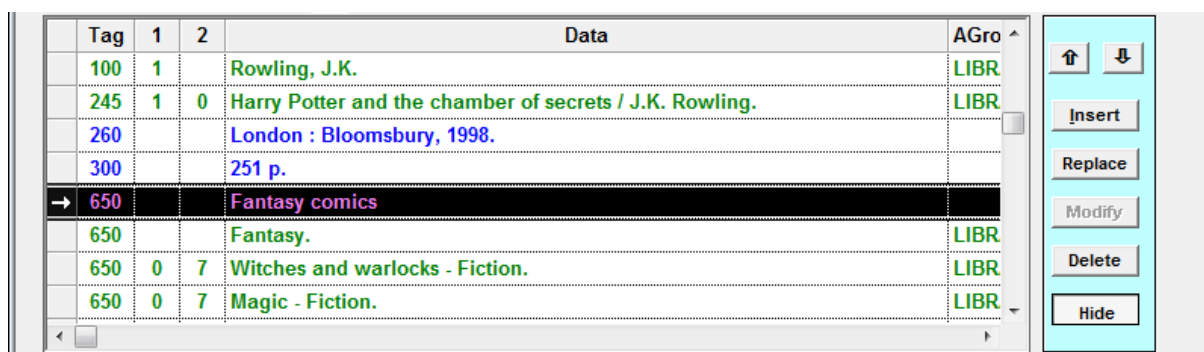

    d. Once the data has been correctly entered click the **F3 Update** button

e. Click on the red **X** in top-tight corner to close the <u>Authority Replace</u> screen – the new Authority will have been added to the catalogue record:

If the heading to be replaced is not found, a new Authority can be created. This only replaces the existing Authority in this particular item.

Modify

Please Note: It is possible to update <u>User Name security</u> so as to DISALLOW the editing of Shared Authorities using the **Modify** button. This helps ensure the integrity of the Shared Authorities (which may be in use in other Catalogue records). Authorities can then be modified by XReferencing to the <u>Authorities</u> module.

1. Highlight the Tag to be modified and click the **Modify** button on the right-hand side of the screen – the Tag will open in the <u>SubFields</u> screen

WARNING: If the tag is an Authority, changes will be made to ALL Catalogue records using this Authority. BEWARE!

2. Make the changes

3. Click the **F3 Update** button when complete

Delete

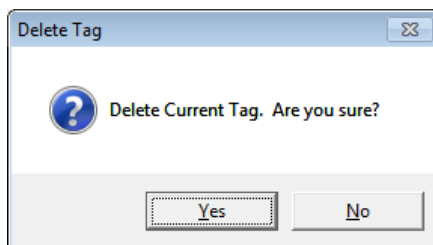Deletes a highlight tag (for this record only – does not affect other Catalogue records or any Authorities previously created).

1. Highlight the Tag to be deleted and click the **Delete** button on the right-hand side of the screen – a prompt will appear with the following message: **Delete Current tag. Are you sure?**

2. Click the **Yes** button

3. The Tag will be deleted

Hide/Show

Alternates between hiding/showing tags for this record.

1. Click on the **Hide** button on the right-hand side of the screen to hide the Tags in the displayed record (**Hide** will then be replaced by **Show**)

2. Click on the **Show** button on the right-hand side of the screen to show the Tags in the displayed record (**Show** will then be replaced by **Hide**)

Please Note: Show has to be selected to enable the Duplicate Button.

Movement of Tags

1. Highlight the Tag to move and use the arrow keys to move the Tags up or down

Please Note: This sequencing possible within the record depends on what is set in the **Main > Supervisor > Installation** - <u>Catalogue</u> tab: **Allow tags to be sequenced anywhere within a catalogue (Y/N)** parameter.

- If it is left at the default **Y**, staff will be able to use the up and down arrows on the Catalogue record to reposition any MARC Tag within that record

- If it is changed to **N**, this will then restrict the ability for adjusting the sequence of a MARC tag in a specific record to its specific range only. This means that if there is only one MARC tag to that record it cannot be moved, but if there is more than one MARC tag, for example subject headings, then these can be moved within this group only

Catalogue Record Created / Last Edited Information

For newly created (and imported) Catalogue records it is now possible to tell which user created a record, and who it was last edited by. The top line shows when the record was last edited, and the bottom line remains the same, showing when the record was created. This information is not retrospective so that for all existing records, only the user, date and time for the last update will be shown.

MASS DELETION OF STOCKITEMS/SAVING TO FILE

Items can be deleted easily from a Saved File. These items can be wanded into the File. This is useful for Public Libraries who have to return items to SLWA, and who want to delete them from their catalogue. It is also useful for schools when a weed of resources is performed (for example: after a Stocktake).

This can be done individually within the *Stockitem* module by calling up the item and clicking the F4 Delete button. If it is the last copy for the Catalogue, you will be prompted to delete the Catalogue entry as well.

Items can be deleted en masse from a Stockitem List (each item that is to be deleted needs to be highlighted) or alternatively from a Saved File.

Stockitem List

1. Launch the *Amlib* client

2. Go to **Main** > **StockItem** > **Stockitem** – the Stockitem screen will display

3. Initiate a **F5 Query** or Stockitem Where search to bring up a list of items to be deleted (alternatively, you may decide to use a Saved File as the basis of your deletions – select **File** > **Display File** > select a saved File > **F9 Select**)

4. Highlight the items to be deleted

5. From the Stockitem List main menu, select **Table** > **Mass Item Deletion** – the Mass Delete Items screen will display:
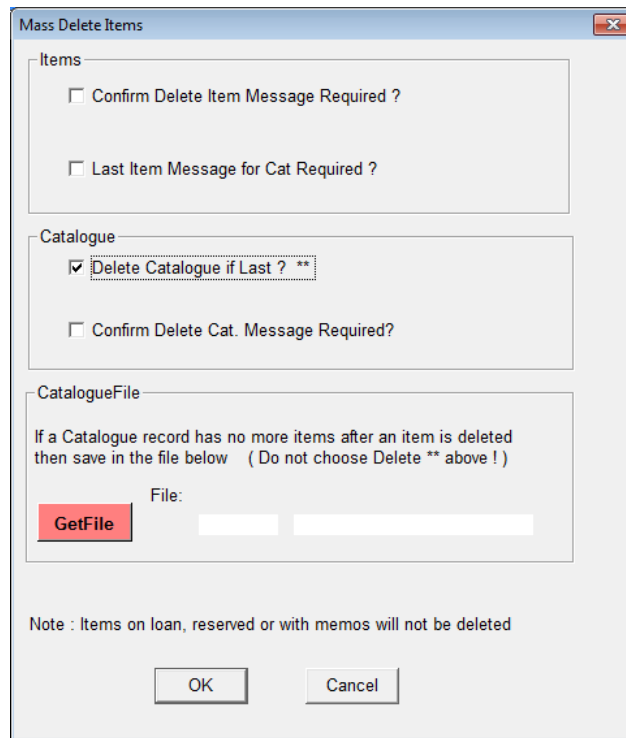
6. Add a **tick** in the Catalogue: Delete Catalogue if Last ? box

7. Click the **OK** button – the following prompt will appear:
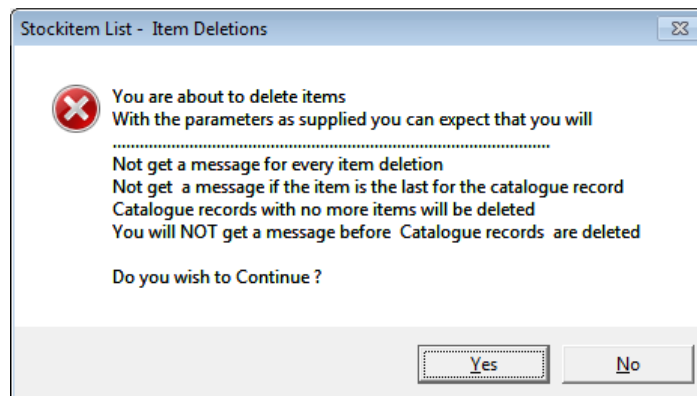
8. Click the **Yes** button

9. The items (and any associated Issue Catalogue records) will be deleted

Z39.50 SEARCHING

Z39.50 is an international information retrieval standard that enables communication between computer systems, including those that operate on different hardware and use different library software (for example: *Amlib*, *Spydus*, *Symphony*, etc.). Searching of other libraries and databases is performed simultaneously in a single search (parallel searching).

Schools can use the Z39.50 facility link to *SCIS*. You will need to contact *SCIS* directly to get your IP address authorised and they will supply the SCIS z39.50 details so that you can set them up as a Z39.50 Server.

- See the *Catalogue* manual for details on how to set up new Servers and new Groups

Please Note: Use of the bibliographic records via Z39.50 is subject to the terms and conditions of the source library.

Amlib Z39.50 Client

1. Launch the *Amlib* client

2. Go to **Main** > **Catalogue** > **CatZSearch** – the Z39.50 Search screen will display:
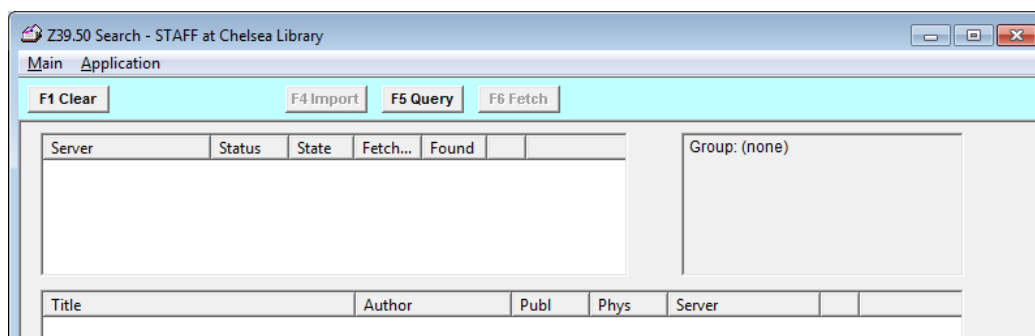
3. Click the **F5 Query** button – Query screen will display:
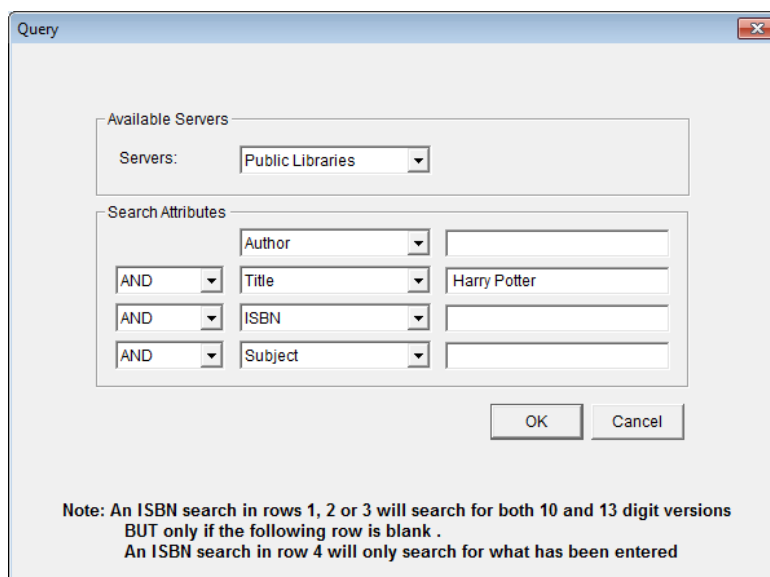
4. Select the Server or Server Group from the <u>Available Servers</u> drop-down box – for example: **Public Libraries**

5. Type in the <u>Search Attributes</u> – for example: **ISBN**, **Title**, **Author**, **Subject** or combination of these

6. Click the **OK** button – the results will display in the main Z39.50 screen:

Z39.50 Search - STAFF at Chelsea Library						
Main Application						

F1 Clear			F4 Import	F5 Query	F6 Fetch	

Server	Status	State	Fetch...	Found		Group: Public Libraries
Ebscohost Busines...	Connect	Busy			001	Title is "harry potter"
Libraries Australia ...	Fetch	Idle	10	15	002	
State Library WA (...	Connect	Busy			003	
Library of Congress	Fetch	Idle	10	356	004	
Armadale City Libr...	Fetch	Idle	10	61	005	

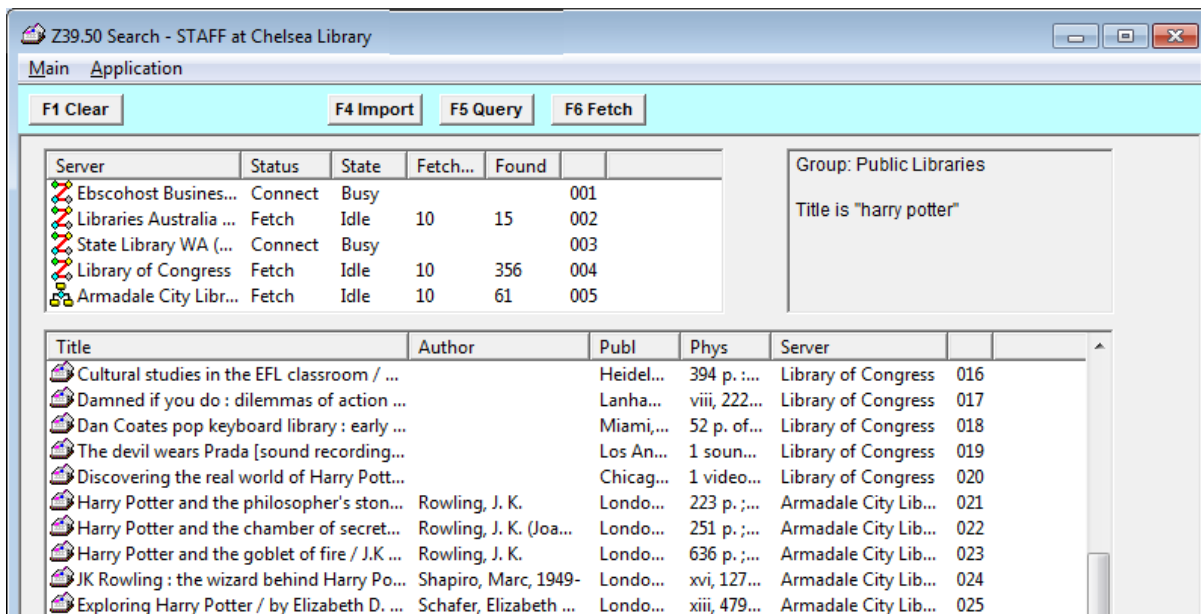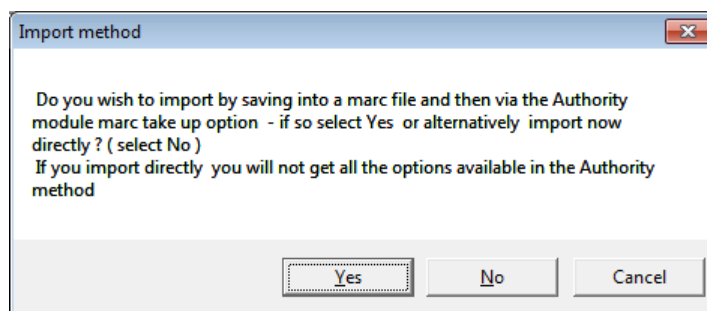| Title	Author	Publ	Phys	Server		
Cultural studies in the EFL classroom / ...		Heidel...	394 p. :...	Library of Congress	016	
Damned if you do : dilemmas of action ...		Lanha...	viii, 222...	Library of Congress	017	
Dan Coates pop keyboard library : early ...		Miami,...	52 p. of...	Library of Congress	018	
The devil wears Prada [sound recording...		Los An...	1 soun...	Library of Congress	019	
Discovering the real world of Harry Pott...		Chicag...	1 video...	Library of Congress	020	
Harry Potter and the philosopher's ston...	Rowling, J. K.	Londo...	223 p. ;...	Armadale City Lib...	021	
Harry Potter and the chamber of secret...	Rowling, J. K. (Joa...	Londo...	251 p. ;...	Armadale City Lib...	022	
Harry Potter and the goblet of fire / J.K ...	Rowling, J. K.	Londo...	636 p. ;...	Armadale City Lib...	023	
JK Rowling : the wizard behind Harry Po...	Shapiro, Marc, 1949-	Londo...	xvi, 127...	Armadale City Lib...	024	
Exploring Harry Potter / by Elizabeth D. ...	Schafer, Elizabeth ...	Londo...	xiii, 479...	Armadale City Lib...	025	

7. The columns can be sorted by clicking any of the column headings

8. Save selected records to a MARC file for import:

    a. Highlight the records (hold the **Ctrl** key and click on records to highlight more than one record)

    b. Click the **F4 Import** button – the <u>Import method</u> screen will display:

Import method
Do you wish to import by saving into a marc file and then via the Authority module marc take up option - if so select Yes or alternatively import now directly? (select No) If you import directly you will not get all the options available in the Authority method
Yes   No   Cancel

    c. Select your import option:

        ▪ Click the **Yes** button: Save the Marc file and then import it

        ▪ Click the **No** button: import directly (not all import options will be available)

        ▪ Click the **Cancel** button: Cancel the import

    d. The highlighted records will saved to a MARC File shown in the dialogue box, to be imported into *Amlib* via MARC Takeup
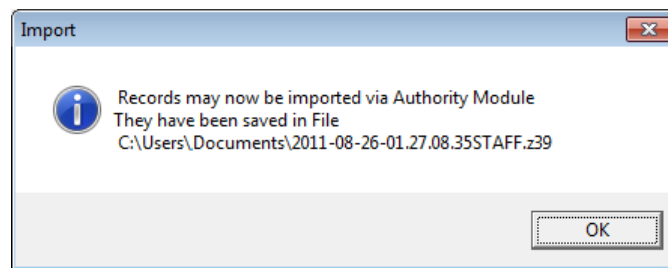
e. The <u>MARC Takeup</u> process will begin automatically – ensure the folder is the correct folder – for example: **My Documents**

Please Note: Please refer to <u>Import MARC Catalogue Data: Bibliographic Data</u> for details of the remainder of this process.