ADVANCE

Cataloguing Management Guide

(Release 6.82)

September 2000

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Introduction

Purpose

The ADVANCE Cataloguing module provides the full capabilities necessary to develop and maintain the computerized database of a library's bibliographic, authority and holdings records:

- The Cataloguing module supports the latest MARC bibliographic and authority updates through loading of MARC format tapes.

- Online interfaces to external bibliographic utilities are included in the system.

- Bibliographic records downloaded from external utilities, or loaded from magnetic tapes, are reformatted to MARC standards, with local holding information added as necessary, before being loaded into the library's main database.

- Edit checks ensure that data entered conforms to the library's pre-defined content and authority standards.

- Changes to bibliographic records filed into the main database are immediately reflected in the online databases.

The *Cataloguing Management Guide* explains to you how to setup and maintain the records in your database.

Contents

Chapter 2 provides an overview of the cataloguing setup process. A function/menu map is also included.

Chapter 3 describes setup procedures for the cataloguing code tables and the optional Community Information Module. It also describes how to create customized workforms that will facilitate the cataloguing process.

Chapter 4 describes setup procedures for holdings.

Chapter 5 discusses cataloguing functions such as: providing access to the cataloguing database, configuring records for importing and

exporting, using edit logging, providing duplicate checking at the classi-fication number level, defining spine labels, and creating the conversion-on-the-fly screen.

Chapter 6 provides an overview of cataloguing management.

Chapter 7 explains how to import and index records.

Chapter 8 describes how to export records.

Chapter 9 provides information on how to manage the cataloguing data-base. It includes information on how to use standard reports to determine the content of the database.

Chapter 10 explains how to use the global change utility to count, report, change, or delete MARC bibliographic or authority records.

NOTE: Prior to Release 6.5, this manual contained Chapter 9, Report Writer. In Release 6.5, this chapter was removed. See the Reports Guide for information about producing reports.

Appendixes

A: Using ADVANCE - presents an overview of how to use the system.

B: Edit Functions - presents the edit functions presented in table format.

C: Diacritics - describes how to use mnemonics to input information when non-diacritics terminals are used.

D: Glossary - defines the terms as used by ADVANCE

E: Community Information Module - discusses the optional, add-on product.

F: Authority Loader - discusses how to define the indexing profile and how to use the authority loader. Three sample profiles are provided.

G: User Permissions - lists the user permissions for cataloguing.

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Other Documentation

Consult other guides for related information:

- the *Cataloguing User's Guide* describes how to perform day-to-day cataloguing tasks in the ADVANCE system.

- the *Utilities Management Guide* describes general ADVANCE setup and management: port definitions, access control, the Report Writer, and so on.

Typographical Conventions

Two special text styles are used in this guide:

1. The function identifiers, text that you can enter, and screen messages are in a monospace font style. Examples: "`BSR`", "`Y`", "`Enter search string for record to merge`".

2. The names of screen fields and options, and cross-references to section or manual titles, are in italics. Examples: "*Local Control Number", "Exit*", "see *Bibliographic Cataloguing*".

Angle brackets around the name of a key mean press the key. For example, <ENTER> means press (or pressing) the ENTER key.

Generic Examples

Because the system can be tailored by the library's system managers to meet local needs, the screens and options shown in this document may not match exactly the ones at your library.

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Cataloguing Setup

In cataloguing setup, the following areas can be configured to meet your needs:

- MARC cataloguing formats
- access to cataloguing functions
- import and export of records
- holdings records
- express cataloguing

This manual explains how to configure the cataloguing module. Though Geac will do much of the configuration during installation, this manual will allow you to make your own modifications and additions.

Configuration of MARC Cataloguing

The configuration of MARC cataloguing defines the tags and subfields that can be used. It also controls their use and defines the templates with which new records will be created. Separate configurations must be created for bibliographic and authority records.

The functions used for this configuration are:

- *Tag & Subfield Descriptions* (BTSD and ATSD), to define the tags and subfields that can be used;

- *Bibliographic* and *Authority Tag & Subfield Edit Checks* (BTSE and ATSE), to define the cataloguing formats;

- *Bibliographic* and *Authority Work File Cataloguing* (BWC and AWC), to define the templates.

Cataloguing formats are subsets of the complete set of MARC fields defined in the system. Each cataloguing format contains the fields used to catalogue a type of material. For example, formats could be created for monographs, sound recordings and kits.

Workforms are subsets of cataloguing formats. These templates contain fields for a more specific type of material than the cataloguing format, or for a type of cataloguing. For example, templates could be created for CD's, cassettes and VHS tapes, as well as for brief cataloguing and full cataloguing.

Cataloguing Enhanced Options (CSOP)

Cataloguing enhanced options are used to control and validate the content of bibliographic and authority records.

Access to Cataloguing Functions

Access to functions in cataloguing is controlled in the same way as in the other ADVANCE modules, through the user level. The level is determined in *Enter Access Codes* (EACC) function of the *ADVANCE Utilities*, which is described in the *Utilities Management Guide*.

However, there are authorizations that are particular to cataloguing. They are:

- to grant access to different records in the workfile:

  Bibliographic Workfile Browse Delimiter (BWBD), *Bibliographic Deleted Records Workfile Browse Delimiter* (BDBD), *Bibliographic Indexing Errors Workfile Browse Delimiter* (BEBD), *Bibliographic History Records Workfile Browse Delimiter* (BHBD), *Bibliographic Workfile Discarded Acquisitions Records* (BDAD), *Authority Workfile Browse Delimiter* (AWBD), *Authority Deleted Records Workfile Browse Delimiter* (ADBD), *Authority Indexing Errors Workfile Browse Delimiter* (AEBD), *Authority History Records Workfile Browse* Delimiter (AHBD), *Authority Workfile Discarded Acquisitions Records* (ADAD);

- to grant access to record status codes *Bibliographic Status Codes* (BSC), *Authority Status Codes* (ASC).

You can link your own user code or someone else's user code to a record being filed into the workfile. A user can be authorized to access only his own records in the workfile, or records with other source codes.

Access to record status codes allows you to use some or all of the status codes, for example: *file into the catalogue*, or *file into the workfile.*

Cataloguing Transactions Log

If desired, the system can keep a log of certain cataloguing transactions (additions, modifications, deletions, etc.). This log can be consulted through the cataloguing reports.

The transactions to be logged are listed in the functions *Cataloguing Tracking Reports* (CSAL).

Importing and Exporting Records

Certain cataloguing parameters will affect record importing and exporting. They are:

- transaction codes: *MARC Translation Codes* (MTC);

- field deletion codes: *Tag/Subfield Deletion Codes* (CSMDC).

Transaction Codes

Each catalogue record is tagged with a transaction code which indicates the source of the record. Certain codes are standard, for example, *transfer from acquisitions* and *local cataloguing*. Other codes can be defined by the library, for example, codes for records loaded with a library-specific loader.

Field Deletion Codes

Whenever records are imported or exported, tags and subfields can be deleted by using field deletion codes, defined in the *Tag/Subfield Deletion Codes* (CSMDC) function.

Conflicting Authorities

A record loaded to ADVANCE may contain as an established form an authority that already exists in the database as a rejected form. This can be managed in one of two ways. Either the system can modify the record to be loaded so that no conflict arises; or, the record can be loaded as is. In this case, though a conflicting authority is created, a report can be created to allow manual resolution of the problem.

Holdings Records

See *Holdings Setup* on page 4-1.

Verification of shelf numbers

Whenever a shelf number is entered that already exists in the catalogue, a warning message appears (only in the English version of ADVANCE.) *Call # Duplicate-Exclusion Class Range* (CDC) allows sections of a classification range to be excluded from this verification.

Spine Labels

Spine labels can be printed through the holdings cataloguing function. The format of the spine labels is configured in *Call Number Spine Label* (CHCSL).

Location codes

Locations can be defined to reflect the physical layout of the library. The location codes entered in the holdings records are then used to locate the library material. Location codes can also be linked to circulation codes so that items from certain locations are loaned according to specific rules.

The functions, *Institution Codes* (CHIC), *Sublocation/Building Codes* (CHSC), *Collection Codes* (CHCC), *Call # Prefix Codes* (CHPC) and *Class Number Codes* (CHNC) are used to manage location codes. These codes are found under the Holdings Setup Menu (CHSM) in both the cataloguing and circulation modules. Their use is described in the *Circulation Management Guide*.

Default Values for Holdings Cataloguing

The default location code for an item is taken from:

• the location of the first item attached to a record.

 If the item added is not the first one attached to a record, the system will propose the location of the first copy as a default.

• the location of the port.

In Holding Default Definition (CEHD) a site, location, collection and circulation code can be defined for each port. When the first item is added to a record, the default location code will be the one assigned according to the user's port.

Express Cataloguing

Express cataloguing creates a brief record from circulation to allow the loan of an uncatalogued item. MARC format is not used. Instead the entry screen is made up of a few clearly labelled fields. This screen can be defined in DEFINE CONVERSION ON THE FLY SCREEN (DCF).

Cataloguing Formats

A cataloguing format is a set of MARC fields used to catalogue a type of material. Each format also has checks to control the quality of cataloguing by validating tags, subfields and indicators, and determining whether or not they are repeatable.

The checks applied to a field can vary depending on the cataloguing format in which it is defined. They are used in the cataloguing functions *Bibliographic MARC Cataloguing* (BMC), *Authority MARC Cataloguing* (AMC), *Bibliographic Work File Cataloguing* (BWC), and *Authority Work File Cataloguing* (AWC) and at the following times:

- entry and modification of records (some checks take place directly on entry, for example, verification of the repeatability of a field);

- filing of a record (FILE command);

- verification of a record (REFORMAT command).

When a record is imported from an outside database, it is not verified by a cataloguing format. An imported record is verified only as to its accordance with the structure described in the *Format for Bibliographic Information Interchange* (ISO Standard 2709).

The Leader

Export Leader and Internal ADVANCE Leader

The MARC leader is a fixed field of 24 characters. It contains coded values that define the parameters for processing the record. ADVANCE uses positions 5 (record status), 6 (type of record), 7 (bibliographic level), 10 (indicator count) and 18 (descriptive cataloguing form) from the leader.

Therefore, when the leader is configured, less than 24 characters are defined. The position of the leader in ADVANCE does not match the positions of the MARC leader. A conversion table defined in UNIVERSE, links the ADVANCE positions to the MARC positions. This table is used when records are exported to create accurate leaders.

Leader Code

The different combinations of positions 6 & 7 create the ADVANCE leader codes. One or more leader codes are assigned to each cataloguing format. For example, the BK (book) format could be assigned the codes *am* (language material, monographic item) and *aa* (language material, component monographic). In cataloguing with that format, the leader would have to match leader codes defined in it.

One format can be linked to many leader codes. However, a leader code can only be linked to one format.

Workforms

Workforms are subsets of cataloguing formats. These templates contain fields for a more specific type of material than the cataloguing format, or for a type of cataloguing. For example, workforms could be created for CD's, cassettes and VHS tapes, as well as for brief cataloguing and full cataloguing.

Default values can be defined for each template. These values will be presented when the template is used but can be modified or deleted if they are not needed for that particular record.

There are no checks on the workform which is only a cataloguing aid. Verification occurs at the level of the cataloguing format. Fields that are not present in the template can still be added as long as they are part of the cataloguing format to which the template is linked.

There is no limit to the number of workforms that can be created for a format. They can be created to meet the needs of each cataloguer.

Workfiles

The ADVANCE workfile is used to store bibliographic and authority records on a temporary basis.

This file can be used to store unfinished records that should not be visible in the OPAC, or records that need other revisions. Imported records can also be kept in the workfile temporarily. Workfile records can be retrieved, modified and indexed in the catalogue. There is only one workfile, and it is common to all the users.

NOTE: Deleted records are automatically stored in the deleted records workfile.

Identification Code and Workfile Prefix

Each time a record is placed in the workfile, an identification code and workfile prefix are entered. The source code (usually the cataloguer's user code) identifies the person who entered the record in the workfile. The workfile prefix indicates the type of record and determines how it can be accessed (through *Bibliographic Work File Cataloguing* [BWC], *Authority Work File Cataloguing* [AWC], *Bibliographic Indexing Errors Workfile Browse Delimiter* [BWIE], etc.).

Once a record is filed in the workfile the prefix is invisible to the user. However, the identification code is displayed in the workfile index.

Access to Workfile Records

The file access parameters can be set to allow each cataloguer to use only certain identification codes when entering or retrieving workfile records. Cataloguers must be authorized to retrieve or enter workfile records. Without additional authorization, cataloguers are allowed access to only their own workfile records.

Record Status Codes

When a record is filed, a code is given to the system to show whether the record is to be kept or deleted. If the record is to be kept, the code indicates such things as whether it is to be sent to the workfile, or transferred from the workfile to the catalogue.

Transaction Codes

The transaction code of a record shows how the record was entered in the catalogue (loaded from OCLC, transferred from Acquisitions, and so on). This code is visible when the MARC record is displayed.

Cataloguers do not enter the transaction code. It is automatically generated by the system depending on which procedure was followed to enter the record in the catalogue.

The transaction code is not part of the MARC format. However, it is stored in position 26 of the ADVANCE leader and position 22 of the MARC leader and created when the record is exported.

Filing/Deleting Bibliographic and Authority Records in ADVANCE.

File Option:

To file or delete a MARC record, you must first have retrieved the MARC record. Use the `File` command to initiate a file (indexing) or delete (deindexing) function. Upon use of the file option, you are prompted for a status code. It is this status code that tells ADVANCE whether to execute a file or delete it. The status codes are defined in Bibliographic and Authority cataloguing setup. There are eight system defined status codes determining the result:

1	Index into workfile.
2	De-index from workfile.
3	Index into main database.
4	De-index from main database.

NOTE: deleted records are placed by the system into a Deleted Records Workfile.

13	File into Workfile and Main Database.
	NOTE: this option creates two copies of the record, at some point one record, usually the workfile, should be deleted.
23	Delete from Workfile and index into Main Database.
24	Delete from Workfile and Main Database.
173	Index into Workfile, strip unwanted tags from MARC record and index the stripped record into the Main Database.

After you have specified a status, the system will perform certain checks and prompt for confirmation.

Cataloguing Options

? help	Provides access to a Library-defined help screen.
# tag	Entering a tag number on this option places the cursor in the record on the specified tag.
Add item	Allows a new item to be added to a format or workform.
Add #	Allows a single element (identified by #) to be added to a format or workform. Used primarily in tag and workform definitions.
Backward	Displays the previous screen in a multi-screen record.
Binding entry	Allows cataloguing of different bibliographic items which share the same call number.
Copy	This command copies the contents of a source item to the current item. An item can be a code, tag, workform, etc.
Copy cataloguing	This command copies the retrieved record and assigns it a new LCN (Local Control Number) when the record is filed. This option is not available when creating new records.
Delete	Delete the item currently displayed. The system asks for confirmation.

Delete #	Allows single element (identified by #) to be deleted from a format or workform.
Del subfield	Deletes a specific subfield from the current tag.
Delete tag	Deletes a specific tag from a format or workform.
Del tag.subfield	Deletes a specific subfield from a specific tag.
Exit	This option loses all data entered after the command to create a new record was entered, or an existing record was retrieved. However, item records created or modified using the Item Update option, or analytic record linked or unlinked will not be affected by exiting from the bibliographic record.
File	Saves the contents of the current item, then exits. Additions and changes must be filed before they can have an effect on the system (The link and unlink commands are exceptions to these rules). The system performs edit checks on bibliographic records before filing them, and displays any errors or inconsistencies found.
Fixed field	Allows entry or modification of encoded data in MARC fixed fields.
Fixed field tag	Displays the fixed field specified by the tag. Used only in bibliographic and authority cataloguing.
Fixed length	Allows the length of a MARC leader or fixed field to be specified. The length entered must conform to MARC standards.
Forward	Displays the next screen in a multi-screen record.
Item update	This option is only available for retrieved bibliographic records. It displays a list of holdings records and provides the ability to display, update, or add holdings records to the bibliographic record.
Labelled display	This option replaces tag numbers with abbreviated mnemonics as defined by setup for each tag.

Leader	Used to display/edit the leader information in Bibliographic and Authority Cataloguing.
Link	Link is available in bibliographic cataloguing only. It is used for linking component and header (host) records in analytic cataloguing. The system prompts for the record to link.
MARC	Displays the contents of the MARC record. To edit a record it must be retrieved.
Merge	This option allows you to merge records and their tags. It incorporates record replacement and holdings movement options when used in Bibliographic Cataloguing. This option is not available when creating new bibliographic or authority records.
Overlay workform	This option is available in both authority and bibliographic cataloguing. The system prompts the user for the type of overlay and the workform name to be used.
Print	This prints the MARC record to a system or terminal printer.
Reformat	This option performs validity checking on the record and displays any errors encountered. It is recommended to be used prior to the file command to facilitate the workflow.
Replace	This option allows you to replace a record with another record. Optionally, you may move holdings from one bibliographic record to another.
Restore	Allows you to restore the record exactly as it was at retrieval (losing any changes that were made before the restore command was used.)
Retrieve	In bibliographic and authority cataloguing, this command retrieves the MARC record. In holdings cataloguing, the Retrieve/Add command displays a blank holdings record template. If there is an existing holdings record attached to the bibliographic record, the institution and call number are copied to the new template. If not, the default institution code is inserted.

Retrieve #   Allows the cataloguer to retrieve and edit the existing holding informa-
                    tion for the specific item attached to the cataloguing record display. The
                    number sign represents the line number of the holdings record. Follow
                    the period with the number representing the desired item on the list
                    displayed.

Unlink   Unlink is available in bibliographic cataloguing only. It is used for
                    unlinking components and host records. The system prompts for the
                    record to unlink.

Text Editing and Tag/Subfield Manipulation

ADVANCE provides special functions for:

- adding, deleting, moving, and copying tags and subfields

- modifying the data contained within the variable fields in both
  authority and bibliographic records, for both line edit and window
  edit modes.

A table listing all of the functions is provided in Appendix B of this
manual. It is applicable to both Authorities and Bibliographic Cata-
loguing.

Cataloguing Enhanced Options

The Cataloguing enhanced options are used to control the bibliographic and authority record content validation and interdependencies checks.

```
                      CATALOGUING ENHANCED OPTIONS


     : CAT.ENH.OPTIONS
     ---------------------------------------------------( Page 1 of 3 )
      BIBLIOGRAPHIC RECORD CHECKS                       ( 0=no, 1=yes )
  1. Tag 008/11-14 Mandatory date2 check                          : 0
  2. Multiple 1XX tag check                                       : 0
  3. Tag 245 requires tag 1XX                                     : 0
  4. Tag 240 requires tag 1XX                                     : 0
  5. Tag 260 check                                                : 0
  6. Tag 362 check                                                : 0
  7. Tag 490 indicator 1 = 1 requires 8XX check                   : 0
  8. LC subject entry required when subject entries present       : 0
  9. Tag 034 requires tag 255 check                               : 0
 10. Tag 87X subfield j must be numeric check                     : 0




 Options:
   Forward   ? Help   # line   Line by line   Print   Exit   File
```

Access

Select Enhanced Options (CSOP) from the Cataloguing Set-up Menu to reach the Cataloguing Enhanced Options screens. Use the *Forward* option to page through the three screens.

Default Settings

The default setting for all the options is 0 which means, **selecting 0 means no check is done**. **Only the result for selecting 1 is described in the following text**.

1. Tag 008/11-14 Mandatory date2 check

Check the tag 8 position 11 to 14 mandatory date2 check on the bibliographic record.

2. Multiple 1XX tag check

Check for multiple 1XX tags in the bibliographic record. If multiple 1XX tags are found, an error is displayed when you try to *File* the record.

3. Tag 245 requires tag 1XX	Check for a 1XX tag if there is a 245 tag in the bibliographic record. If no 1XX tag is found and there is a 245 tag, an error is displayed when you try to *File* the record.
4. Tag 240 requires tag 1XX	Check for a 1XX tag if there is a 240 tag in the bibliographic record. If no 1XX tag is found and there is a 240 tag, an error is displayed when you try to *File* the record. 130 and 243 tags are disallowed if a 240 tag is present.
5. Tag 260 check	Check for 261 or 262 tag if there is a 260 tag in the bibliographic record. Cannot have a 261 or 262 tag if there is a 260 tag; an error is displayed when you try to *File* the record.
6. Tag 362 check	Check for multiple formatted 362 tags in the bibliographic record (indicator 1=0 means it is formatted). If multiple 362 tags are found, an error is displayed when you try to *File* the record.
7. Tag 490 indicator 1 = 1 requires 8XX check	Check for 8XX tag if there is a tag 490 indicator 1 equal to 1 in the bibliographic record. If no 8XX tag is found, an error is displayed when you try to *File* the record.
8. LC subject entry required when subject entries present	Check for tags 600, 610, 611, 650, 651 indicator 2 equal to 0 on at least one of the above 6XX tags in the bibliographic record. If none of the tags (600, 610, 611, 650, 651) have an indicator 2 equal to 0, an error is displayed when you try to *File* the record.
9. Tag 034 requires tag 255 check	Check for 255 tag if there is a 034 tag in the bibliographic record. If no 255 tag is found and there is a 034 tag, an error is displayed when you try to *File* the record.
10. Tag 87X subfield j must be numeric check	Checks that tag 870 subfield j has numeric data in the bibliographic record. If the data in subfield j is not numeric, an error is displayed when you try to *File* the record.

Authority Record Checks

Authority record checks are based on the *Summary of Data Coding Interdependencies*, *Appendix B*, *USMARC Format for Authority Data.*

```
                  CATALOGUING ENHANCED OPTIONS


     : CAT.ENH.OPTIONS
    ---------------------------------------------------( Page 2 of 3 )
     AUTHORITY RECORD CHECKS                           ( 0=no, 1=yes )
   1. Restrict authority record changes by institution            : 0
   2. Tag 008 Established heading check                            : 0
   3. Tag 008 Established topic term check                        : 0
   4. Tag 008 Established name, name/title, uniform title         : 0
   5. Tag 008 Established heading for a series check              : 0
   6. Tag 008 Reference record check                             : 0
   7. Tag 008 Subdivision record check                           : 0
   8. Tag 008 Node label check                                   : 0




   Options:
    Forward   Backward   ? Help   # line   Line by line   Print   Exit   File
```

1. Restrict authority record changes by institution

Check tag 040 $a NUC institution symbol in the authority record. Changes to the authority record can only be made if the institution identified is the same as the user. If the institutions does not match, an error is displayed when you *File* the record.

2. Tag 008 Established heading check

Check if tag 008 position 9 is equal to 0, meaning that it is an established heading in the authority record.

Several checks are done if record is an established heading.

- The 1XX field cannot be a 18X for an established heading.

- Can not have a 260 tag for an established heading.

- Can not have a 664 tag for an established heading.

- Can not have a 666 tag for an established heading.

- Tag 008/6 must be '|' or 'n' if 008/15 = 'b'.

- If tag 008/10 = 'n', tag 008/11 must not be code 'n'.

- If tag 008/13 is code 'n' if 008/12 = 'n' or 008/16 = 'b'.

- If tag 008/14 is code 'a' if 008/10 is not code 'n' ($v, $x, $y, $z must not be present in 1XX (not 150).

- If tag 008/15 is code 'a' if 008/11 is not code 'n' ($v, $x, $y, $z may be present in 1XX.

- If tag 008/16 is code 'a' if 008/12 is not code 'n' ($v, $x, $y, $z must not be present in 1XX (not 150).

- If tag 008/17 must not be 'n' (but may be '|') for a established heading/subdivision record.

- If tag 008/29 is code 'a' or 'b' if 4XX/5XX fields are present.

- If tag 008/32 is code 'n' if 1XX is not a 100 field having Indicator 1 = 0, 1 or 2.

- If tag 008/33 must not be code 'n' for an established heading.

- One of tag 008/14-16 must be 'a' for an established heading.

Gives an error. If 0 = No is entered then no check is done.

3. Tag 008 Established topic term check

- Headings other than headings for series may not contain the following series specific variable tags: 014, 020, 022, 050, 060, 070, 082, 09X, 64X.

- Field 663 not allowed in a topical or non jurisdictional geographical headings.

- Tag 008/7 must be '|' or 'n' for a topical or non jurisdictional geographic heading.

- Tag 008/10 must be 'n' for a topical or non jurisdictional geographic heading.

- Tag 008/11 must not be 'n' for a topical or non jurisdictional geographic heading.

- Tag 008/12 must be 'n' for a topical or non jurisdictional geographic heading.

- Tag 008/13 must be 'n' for a topical or non jurisdictional geographic heading.

- Tag 008/14 must be 'b' for a topical or non jurisdictional geographic heading.
- Tag 008/15 must be 'a' for a topical or non jurisdictional geographic heading.
- Tag 008/16 must be 'b' for a topical or non jurisdictional geographic heading.
- Tag 008/28 must be '|' or blank for a topical or non jurisdictional geographic heading.

4. Tag 008 Established name, name/title, uniform title

- Headings other than headings for series may not contain the following series specific variable tags: 014, 020, 022, 050, 060, 070, 082, 09X, 64X.
- Tag 008/10 must not be code 'n' for a name, name/title or uniform title heading.
- Tag 008/12-13 must be code 'n' for a name, name/title or uniform title heading.
- Tag 008/14 must be code 'a' for a name, name/title or uniform title heading.
- Tag 008/15 must be code 'a' if 008/11 is not 'n'.
- Tag 008/28 must a defined code or a '|' for a name, name/title or uniform title heading (other than headings for series).

5. Tag 008 Established heading for a series check

- 641 and 642 must not be present if 008/13 = 'b' or 'n'.
- 642 requires field 645 $a be code t.
- 644, 645, and 646 must not be present if 008/12 = 'c'.
- 008/10 must not be 'n' for a established heading for a series.
- 008/12 must not be 'n' for a established heading for a series.
- 008/33 must not be 'n' for a established heading for a series.
- 008/14 must be 'a' for a established heading for a series.
- 008/16 must be 'a' for a established heading for a series.
- 008/15 must be code 'a' if 008/11 is not 'n'.
- 008/28 must be '|' or blank for established heading for a series.

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6. Tag 008 Reference record check	• 1XX field cannot be a 18X for a reference record.

- 1XX field cannot be a 18X for a reference record.
- 4XX and 5XX cannot be present in a reference record.
- Tag 008/6 must be '|' or 'n' for a reference record.
- Tag 008/10 may not be code 'n' if 008/9 = 'b' or 'c' and 664 or 666 are present.
- Tag 008/11 may not be code 'n' if 008/9 = 'b' or 'g' and 260 is present.
- Tag 008/14-16 must be 'b' for a reference record.
- Tag 008/12 must be 'n' for a reference record.
- Tag 008/13 must be 'n' for a reference record.
- Tag 008/29 must be 'n' for a reference record.
- Tag 008/33 must be 'n' for a reference record.
- Tag 008/28 must be '|' or blank for a reference record.

7. Tag 008 Subdivision record check

- 18X field is mandatory for a subdivision record.
- Tag 008/7 must be '|' or 'n' for a subdivision record.
- Tag 008/10 must be 'n' for a subdivision record.
- Tag 008/12 must be 'n' for a subdivision record.
- Tag 008/13 must be 'n' for a subdivision record.
- Tag 008/32 must be 'n' for a subdivision record.
- Tag 008/33 must be 'n' for a subdivision record.
- Tag 008/11 must not be 'n' for a subdivision record.
- Tag 008/14-16 must be 'b' for a subdivision record.
- Tag 008/17 must not be 'n' (but may be '|') for a subdivision record.
- Tag 008/29 is code 'a' or 'b' if 4XX/5XX fields are present.

8. Tag 008 Node label check

- 1XX field cannot be a 18X for a node label.
- 260, 4XX and 5XX cannot be present in a node label.
- Tag 008/6 must be '|' or 'n' for a node label.
- Tag 008/7 must be '|' or 'n' for a node label.

- Tag 008/10 must be 'n' for a node label.

- Tag 008/12 must be 'n' for a node label.

- Tag 008/13 must be 'n' for a node label.

- Tag 008/17 must be 'n' for a node label.

- Tag 008/29 must be 'n' for a node label.

- Tag 008/32 must be 'n' for a node label.

- Tag 008/33 must be 'n' for a node label.

- Tag 008/11 must not be 'n' for a node label.

- Tag 008/14-16 must be 'b' for a node label.

Authority Matching Checks

A warning appears when the conflicts listed below are encountered (if 1 is selected) when you *File* the record. These conflicts are not included in the reports issued from the Action Logging (CSAL) table.

```
                   CATALOGUING ENHANCED OPTIONS


      : CAT.ENH.OPTIONS
    ---------------------------------------------------( Page 3 of 3 )
      AUTHORITY MATCHING CHECKS                      ( 0=no, 1=yes )
1. Check conflicts tag 008/9  Kind of record                    : 0
2. Check conflicts tag 008/11 Subject Thesauri                  : 0
3. Check conflicts tag 008/14 Main added entry 1xx/7xx          : 0
4. Check conflicts tag 008/15 Subject added entry 6xx           : 0
5. Check conflicts tag 008/16 Series added entry 4xx/8xx        : 0







Options:
  Backward   ? Help   # line   Line by line   Print   Exit   File
```

1. Check conflicts tag 008/9 Kind of record	If the Incoming tag 008/9 = 'a' and the Current tag 008/9 # 'a,f,c' then it's a conflict.
	If the Incoming tag 008/9 # 'a' and the Incoming tag 008/9 # Current tag 008/9 and the incoming tag 008/9 # 'c' then Conflict.
2. Check conflicts tag 008/11 Subject Thesauri	If the Incoming tag 008/11 = 'n' and the current tag 008/11 # 'n or a' then Conflict.
	If the Incoming tag 008/11 # the current 008/11 then Conflict
	If the Incoming tag 008/11 = 'z' and the tag 040 $f's are # then Conflict
3. Check conflicts tag 008/14 Main added entry 1xx/7xx	If Incoming tag 008/9 = 'a' and Incoming tag 008/14 = 'a' and Current tag 008/14 # 'a' then
	conflict with 008/14 (Heading use - main/added entry).
4. Check conflicts tag 008/15 Subject added entry 6xx	If Incoming tag 008/9 = 'a' and Incoming tag 008/15 = 'a' and current tag 008/15 # 'a' then
	Conflict with 008/15 (Heading use - subject added entry).
5. Check conflicts tag 008/16 Series added entry 4xx/8xx	If Incoming tag 008/9 = 'a' and Incoming tag 008/16 = 'a' and current tag 008/16 # 'a' then Conflict with 008/16 (Heading use - series added entry).

Stopword and Article Lists

Stopword Lists display stopwords that the system removes from search strings. For example, the title `The Farmer in the dell` would supply only two words for the title keyword index search: `FARMER` and `DELL` because the words `IN` and `THE` are defined as stopwords.

To access the STOPWORD LISTS screen, enter the screen identifier `DSTOP` from any Cataloguing or Online Catalogue menu. Alternately:

• select Stopword `(DSTOP)` from Stopword and Article List Menu `(CSSA)` on the Cataloguing Set-up Menu

• select `DSTOP` from the *Online Catalogue Master Menu*.

The default English-language system lists are shown.

```
                    STOPWORD LISTS             04 JUN 93    16:41:30

  The following words are ignored in word searches:

  Subject          : AN AND AS IN THE THIS TO


  Title            : AN AND AS IN THE THIS TO


  Author           : AN AND AS IN THE THIS TO


  Series           : AN AND AS IN THE THIS TO


  All-of-the-above : AN AND AS IN THE THIS TO


 Press <ENTER> to exit.
```

The system also removes stopwords from your keyword search strings. For example, the following title keyword search:

`TITLE WORD(S): DELL FARMER IN`

is processed as a search for `FARMER` and `DELL`.

Changing Stopword Lists

Please contact your Geac representative before you make changes to your stopword list.

Type CSTOP at any cataloguing screen to obtain the STOPWORD LIST screen. Use the *# line* or *Line by line* option to edit the lists. *File* to save the changes. The modifications to the list become active immediately.

```
                        STOPWORD LIST


    CODE : STOPWORD
    -----------------------------------------------------------------

 *** CAUTION : PLEASE CONTACT GEAC SUPPORT BEFORE YOU MAKE ANY CHANGES ***

 1. Subject index     : AN,AND,AS,IN,THE,THIS,TO

 2. Title index       : AN,AND,AS,IN,THE,THIS,TO

 3. Author index      : AN,AND,AS,IN,THE,THIS,TO

 4. Series index      : AN,AND,AS,IN,THE,THIS,TO

 5. All-of-the-above  : AN,AND,AS,IN,THE,THIS,TO



 Options:
  ? Help   # line   Line by line   Print   Exit
```

Leading Article Lists

Leading Article Lists display leading articles that the system removes from index entries and search strings. For example, the title `The Farmer in the dell` would be filed as `FARMER IN THE DELL` because `THE` is defined as a leading article.

To access the LEADING ARTICLE LISTS screen, enter the screen identifier DART at any Cataloguing or Online Catalogue menu. Alternately:

• select Leading Article Display (DART) from the Stopword and Article List Menu (CSSA) on the Cataloguing Set-up Menu

• select Leading Article Display (DART) from the *Online Catalogue Master Menu.*

The default English-language system lists are shown.

```
                      ARTICLE LIST


    CODE : ARTICLE
   -----------------------------------------------------------------
*** CAUTION : PLEASE CONTACT GEAC SUPPORT BEFORE YOU MAKE ANY CHANGES ***

1. Subject index     : A,AN,THE,UN,UNE,LE,LA

2. Title index       : A,AN,THE,UN,UNE,LE,LA

3. Author index      : A,AN,THE,UN,UNE,LE,LA

4. Series index      : A,AN,THE,UN,UNE,LE,LA

5. All-of-the-above  : A,AN,THE,UN,UNE,LE,LA

6. Ignore Leading    : 0
     Articles, Even If Non-filing count is Zero (1=Yes,0=No)

Options:
 ? help   # line   Line by line   Print   Exit
```

Changing Article Lists

Please contact your Geac representative before you make changes to your stopword list.

Access   Type CART at any cataloguing screen to obtain the ARTICLE LIST screen.

```
                     ARTICLE LIST


    CODE : ARTICLE
    ------------------------------------------------------------------
 *** CAUTION : PLEASE CONTACT GEAC SUPPORT BEFORE YOU MAKE ANY CHANGES ***

 1. Subject index     : A,AN,THE,UN,UNE,LE,LA

 2. Title index       : A,AN,THE,UN,UNE,LE,LA

 3. Author index      : A,AN,THE,UN,UNE,LE,LA

 4. Series index      : A,AN,THE,UN,UNE,LE,LA

 5. All-of-the-above  : A,AN,THE,UN,UNE,LE,LA

 6. Ignore Leading    : 0
      Articles, Even If Non-filing count is Zero (1=Yes,0=No)

 Options:
  ? help   # line   Line by line   Print   Exit
```

Use the *# line* or *Line by line* option to edit the lists. *File* to save the changes. The modifications to the list become active immediately.

Nonfiling Count   If a heading comes from a MARC field with a nonfiling count indicator, the system ignores the specified number of characters when filing and does not apply the leading article lists. For example, the title taken from the field:

```
    245 04$aThe Farmer in the dell
```

would be filed as *FARMER IN THE DELL* because the non-filing count is 4.

Ignore Leading   [1, 0]

1   Yes. Ignores leading articles. If the nonfiling count is zero then do not apply the system leading article list. Nothing would be stripped. NOTE: This is new for Release 6.8 and is consistent with USMARC rules.

0   No. Apply the leading article strip list. This is the way the system has worked in previous releases. Blank, null and 0=no are equivalent and are all treated the same way by the system.

NOTE: **If this option is changed, a re-build of all indexes is required**.

Browse Search   The system also ignores leading articles in your browse search strings.
For example, the following title browse search:

`TITLE: THE FARMER IN THE DELL`

is processed as a search for *FARMER IN THE DELL*.

Menu Structure

The menus and functions you may encounter in using the Cataloguing Module are listed in this section. The user-availability, location, and titles of these items might have been modified by the library.

- Items in *italics* are covered in the *Cataloguing Management Guide*, except for the Holdings Setup Menu (CHSM) which is covered in the *Circulation Management Guide*.

- Non-italic items are covered in the *Cataloguing User's Guide.*

- Items in **bold** are menus.

MM   ADVANCE Master Menu

    CAT   Cataloguing Main Menu

        CSM   Cataloguing Set-Up Menu
            CSMC   MARC Codes Menu
                MFC   MARC Format Codes
                MMC   MARC Material Codes
                MTC   MARC Transaction Codes
                CSMDC   Tag/Subfield Deletion Codes
            CSGC   General Codes Menu
                CSCC   Country Codes
                CSLC   Language Codes
            CSRC   Related Codes Menu
                DCF   Define Conversion on the Fly Screens
                CDC   Call # Duplicate-Exclusion Class Range
            CSAL   Action Logging
            CSSA   Stopword and Article List Menu
                DSTOP   Stopword Display
                DART   Leading Article Display
            CSOP   Enhanced Options

        BCM   Bibliographic Cataloguing Menu
            BSM   Set-Up Menu
                BTSD   Tag & Subfield Descriptions
                BTSE   Tag & Subfield Edit Checks
                BCW   Cataloguing Workforms
                BSC   Status Codes
                BWBD   Workfile Browse Delimiter

	BDBD	*Deleted Records Workfile Browse Delimiter*
	BEBD	*Indexing Errors Workfile Browse Delimiter*
	BHBD	*History Records Workfile Browse Delimiter*
	BDAD	*Discarded ACQ Workfile Browse Delimiter*
BCWS	Cataloguer's Work Screen	
BSR	Search Online Catalogue	
BMC	MARC Cataloguing	
BWC	Work File Cataloguing	
BAWM	**Additional Work Files Menu**	
	BWDR	Deleted Records
	BWIE	Indexing Errors
	BWHR	History Records
	BWDF	Discarded Acquisitions Records

ACM	***Authority Cataloguing Menu***	
ASM	***Set-Up Menu***	
	ATSD	*Tag & Subfield Descriptions*
	ATSE	*Tag & Subfield Edit Checks*
	ACW	*Cataloguing Workforms*
	ASC	*Status Codes*
	AWBD	*Workfile Browse Delimiter*
	ADBD	*Deleted Records Workfile Browse Delimiter*
	AEBD	*Indexing Errors Workfile Browse Delimiter*
	AHBD	*History Records Workfile Browse Delimiter*
ACWS	Cataloguer's Work Screen	
ASR	Search Online Catalogue	
AMC	MARC Cataloguing	
AWC	Workfile Cataloguing	
AAWM	**Additional Work Files Menu**	
	AWDR	Deleted Records
	AWIE	Indexing Errors
	AWHR	History Records

CHM	**Cataloguing Holdings Menu**	
CHSM	***Holding Setup Menu***	
	CHIC	*Institution Codes*
	CHSC	*Sublocation/Building Codes*
	CHCC	*Collection Codes*
	CHPC	*Call# Prefix Codes*
	CHNC	*Class Number Codes*
	CDPT	*Default Price Tag*
	HDD	*Holdings Display Definition*
	HCDD	*Holdings Client Display Definition*

PUBP	*Publication Pattern Type*
FREQ	*Frequency Codes*
CHRN	*Chronology Codes*
CHKT	*Checkin Type*
PHYS	*Physical Format*
CLMSG	*Claim Message Codes*
CLMCD	*Claim Cycle Codes*
SHPTO	*Shipto Codes*
NUMB	*NumberingCodes*
PREG	*Publication Regularity*
PREGL	*Publication Regularity Labels*

CHMP   *Materials Processing Codes Menu*

CHCSL	Call Number Spine Label
CEHI	Edit Holdings Information
CEHD	Holdings Default Definition
FLSC	Flag Shelf Cards (not fully implemented)
PRSC	Print Shelf Cards (not fully implemented)
SCPC	Shelf Card Print Control (not fully implemented)

CRM   *Cataloguing Reporting Menu*

CCR   *System Reports*

Cataloguing Authority
Cataloguing Authority Statistics
Cataloguing Bibliographic
Cataloguing Bibliographic Statistics
OCLC Microenhancer Exception Reports

RW	*Report Writer*
CRGC	*Report Group Codes*
RPC	*Report Prompt Codes*

CUTI   *Cataloguing Utilities Menu*

GBLCNG Global Change Utility

CICM   *Community Information Cataloguing Menu*

CCM   *CIM Cataloguing Menu*

CCSM   *CIM Cataloguing Set-Up Menu*

CTSD	*CIM Tag & Subfield Descriptions*
CTSE	*CIM Tag & Subfield Edit Checks*
CCW	*CIM Cataloguing Workforms*
CWBD	*CIM Workfile Browse Delimiter*
CDBD	*CIM Deleted Records Workfile Browse Delimiter*
CEBD	*CIM Indexing Errors Workfile Browse Delimiter*

                CHBD   CIM History Records Workfile Browse Delimiter

      CCWS   CIM Cataloguer's Work Screen

      CCMC   CIM MARC Cataloguing

      CWC   CIM Work File Cataloguing

      CAWM   **CIM Additional Work Files Menu**

                CWDR   CIM Deleted Records

                CWIE   CIM Indexing Errors

                CWHR   CIM History Records

CACM   **CIM Authority Cataloguing Menu**

    CASM   **CIM Set-Up Menu**

                CATSD   CIM Tag & Subfield Descriptions

                CATSE   CIM Tag & Subfield Edit Checks

                CACW   CIM Cataloguing Workforms

                CAWBD CIM Workfile Browse Delimiter

                CADBD CIM Deleted Records Workfile Browse Delimiter

                CAEBD CIM Indexing Errors Workfile Browse Delimiter

                CAHBD CIM History Records Workfile Browse Delimiter

    CACWS CIM Cataloguer's Work Screen

    CACMC CIM MARC Cataloguing

    CAWC   CIM Workfile Cataloguing

    CAAWM **CIM Additional Work Files Menu**

                CAWDR CIM Deleted Records

                CAWIE   CIM Indexing Errors

                CAWHR CIM History Records

CGBLCNG **CIM Global Change Utility**

Utilities Menu

MM   **ADVANCE Master Menu**

       UTIL   *Utility Menu*

              UTLM   *Import/Export Menu*

                    UBIM   *Bibliographic Importing Menu*

                          UBII   *Import Standard MARC*

                          UBIX   *Index MARC Records*

                          UBIS   *Stop MARC Indexing*

                          RF173   *Index Report Log*

                    UAIM   *Authority Importing Menu*

                          UAII   *Import Standard MARC*

                          UAIX   *Index MARC Records*

                          UAIS   *Stop MARC Indexing*

                          RF172   *Index Report Log*

                    UAEM   *MARC Exporting Menu*

                          UAES   *Exporting Selection Codes*

                          UABE   *Authority & Bibliographic Exporting*

                    UPIM   *Patron Importing Menu*

                          UPIR   *Import Patron Records*

                          UIPR   *Index Patron Records*

3

Set Up Tables

Cataloguing reports can be used to show you how the MARC standards are configured. These reports can be accessed through the function *Cataloguing Reports* (CCR):

Bibliographic Cataloguing

Code	Col.	Description
035	80	Bibliographic indexing profile
036	80	Bibliographic indexing profile – detail
037	80	Format types and description by format
038	132	Bib Edit Checks sorted by Tag Description
039	132	Bib Edit Checks by Tag - wide
040	80	Bib Edit Checks by Tag
041	80	Bib Workforms by format
045	80	Bib Subfield descriptions
049	132	Bib Workform tag/default data – wide
050	80	Bib Workform tag/default data

Authority Cataloguing

Code	Col.	Description
002	80	Authority indexing profile
003	80	Authority indexing profile – detail
004	80	Format types and description by format
005	132	Auth Edit Checks sorted by Tag Description
006	132	Auth Edit Checks by Tag – wide
007	80	Auth Edit Checks by Tag
008	80	Auth Workforms by MARC format
013	80	Auth Subfield descriptions
015	132	Auth Workform tag/default data – wide
016	80	Auth Workform tag/default data

Defining MARC Fields

Every tag and subfield that is to be used in cataloguing must be defined in *Bibliographic Tag & Subfield Descriptions* (BTSD) or *Authority Tag & Subfield Descriptions* (ATSD). Both functions are used in the same way.

Privileged Information

You can enter sensitive or privileged information at the subfield or tag level in bibliographic records. The privilege level you assign to each tag/subfield determines whether the information will be displayed in the online catalogue and to cataloguing staff.

Privileged information is displayed only to users who have a privilege level greater than or equal to the value specified. From an OPAC search, the information is omitted. The message Privileged Information appears when cataloguers display a bibliographic record or when the *MARC* option is used to display the full bibliographic record from the online catalogue.

The library can identify records that contain privileged information by defining a position in the leader. The privileged information flag in a record's Leader determines whether the system uses or ignores the tag and subfield privilege level definitions.

If the *Privileged Record* field on the MARC FIXED FIELDS screen is set to 0:

• the system recognizes that the record does not contain sensitive information, and

• ignores the privilege level values in the bibliographic record.

If the *Privileged Record* field is blank or set to 1:

• the system recognizes that the record does contain sensitive information and

• verifies that user has the appropriate privilege level before the information is displayed.

See Appendix E and *Available OPAC Databases* in the *Online Catalogue Guide*. Update the leader definition in BTSE or CTSE for the specific format to include the definition of the privileged flag.

```
                    TAG AND SUBFIELD VALIDATION


   Tag : 245

1) Description      : TITLE STATEMENT
2) Short Label      : TITL




   Valid Subfields  : a,b,c,f,g,h,k,n,p,s

3) Subfield         :
   Description      :
   Short Label      :
   Privilege Level  :
   Subfield Ordering and Combinations:

4) Privilege Level for Tag:

Options:
 ? help   # line   Del subfield   Delete   File   Exit
```

Adding a New Field

Tag	Enter the tag to be added. Do not add zeroes to the front of a tag. For example, for tag 010, enter 10.
1) Description	Enter the tag name. It will be displayed at the bottom of the screen during cataloguing whenever the tag is entered.
2) Short Label	An abbreviation (maximum 4 characters) of the tag may be entered. It will be displayed instead of the tag during cataloguing if the labelled display option is used.
Valid Subfields	As each subfield is entered, it is displayed on this line.
3) Subfield	Enter the code of the subfield.
Description	Enter the subfield name. It will be displayed at the bottom of the screen during cataloguing whenever the subfield is entered if the labelled display option is chosen.
Short Label	An abbreviation (maximum 4 characters) of the subfield may be entered. It will be displayed instead of the subfield during cataloguing.
Privilege Level	Enter a number between 0 and 99.
0 or Null	There are no restrictions on information in this subfield.
1 through 99	This subfield contains sensitive or privileged information. This information is displayed to users whose access level is equal to or higher than the value specified in this field.
Subfield Ordering and Combinations	Display field only. The setup for this field is specified in B.INDEX and should only done in consultation with Geac Support. The system does not sort the subfields into the order in this field. It is only used for the interfiling of the authorized and non-authorized subfields in the bibliographic tag when an authority record is changed.
4) Privilege Level for Tag	Enter a number between 0 and 99.
0 or Null	There are no restrictions on information in this tag.

1 through 99   This tag contains sensitive or privileged information. This information is displayed to users whose access level is equal to or higher than the value specified in this field.

Modifying an Existing Field

If an existing tag is entered, its parameters will be displayed.

To modify a parameter, enter its line number and type the modification over the old data.

Deleting a Subfield

To delete a subfield, use the command `Del Subfield`.

To delete a tag, use the command `Delete.`

`FILE` the records, or quit with <EXIT>.

NOTE: Do not delete a tag or subfield in *Bibliographic Tag & Subfield Descriptions* (`BTSD`) or *Authority Tag & Subfield Descriptions* (`ATSD`) if it still exists in the cataloguing format.

Defining Cataloguing Formats

Procedure:

1. Each format is distinguished by a code. Define the code in *MARC Format Codes* (`MFC`).

2. Define the leader codes for the format in *MARC Material Codes* (`MMC`).

3. Add any tags or subfields not already defined in ADVANCE to *Bibliographic Tag & Subfield Descriptions* (`BTSD`) or *Authority Tag & Subfield Descriptions* (`ATSD`).

4. Select the tags and subfields for the format, define the controls and leader in *Bibliographic Tag & Subfield Edit Checks* (`BTSE`) and *Authority Tag & Subfield Edit Checks* (`ATSE`).

5. Create workforms for the format in *Bibliographic Cataloguing Workforms* (`BCW`) and *Authority Cataloguing Workforms* (`ACW`). See *Creating Workforms*.

Format Code

Once in the function *MARC Format Codes* (MFC), type A to add a new code. Enter the code (2 uppercase letters).

```
                         MARC FORMAT

        MARC FORMAT CODE : BK


        -------------------------------------------------------------------
    1. Format Description    : Book & monographs
        Material Codes       : aa,ac,am
    3. Authority Format (1=YES: 0




    Options:
       ? = ? help          # = # line            L = Line by line
      CO = Copy           PRT = Print            E = Exit
```

1. Format Description	Name of the format.
2. Material Codes	Two character mnemonic defined in MARC standards or defined by the library if this is a local use table.
3. Authority Format	Enter 1 for a format to catalogue authority records, or 0 for biblio- graphic records.

FILE or quit with EXIT.

Leader Codes

Once in the function *MARC Material Codes* (MMC), type A to add a new code. The code is made up of two lowercase letters. The first is the MARC code for the type of record and the second the bibliographic level.

```
                        MATERIAL CODES

      MATERIAL CODE : am
      ----------------------------------------------------------------------
  1. Description  : BK - Language material : Monograph/Item
  2. Format       : BK = Book & monographs






  Options:

     ? = ? help          # = # line           L = Line by line
    CO = Copy          PRT = Print            E = Exit
```

For example, the leader code for a monograph would be **am** (**a**=language material, and **m**=monograph for LCMARC or UNIMARC).

1. Description   Describe the leader code (for example, printed monographs).

2. Format   Enter the code of the format that will be linked to this leader code.

FILE or quit with EXIT. Several leader codes can be linked to the same format.

Defining Tags and Subfields for a Format

The tags and subfields defined here are displayed at the bottom of the screen when cataloguing. *Bibliographic Tag & Subfield Edit Checks* (BTSE), for bibliographic records, and *Authority Tag & Subfield Edit Checks* (ATSE) for authority records are completed in the same way.

```
                    TAG & SUBFIELD EDIT CHECKS

   MARC tag or (L)eader : 245     TITLE STATEMENT
   Format              : BK  Book & monographs

   1) Repeatable? (Y/N) : N
   2) Required?   (Y/N) : Y
   3) Fixed Field (Y/N) : N
   4) Valid Indicators  : B01,B0123456789,,,,,,,


      Subfields entered : 6,a,b,c,f,g,h,k,n,p,s

   5) Subfield      :
      Repeatable? (Y/N) :     Required? (Y/N) :      Fixed Field (Y/N) :
      Pre characters to insert  :
      Post characters to insert :

   Valid Subfields : 6,a,b,c,f,g,h,k,n,p,s

   Options:
    ? Help  # line   Line by line   Del subfield   Delete   File   Exit
```

Adding a New Field to the Format

MARC Tag or (L)eader	Enter the tag of the first field to be defined. (See *Defining the Leader.*)
Format	Enter the format code to be defined from *MARC Format Codes* (MFC).
1. Repeatable	Y if the field is repeatable, N if not.
2. Required	Y if the field is required, N if not.
3. Fixed field	Y for a fixed field, N if not. NOTE: In UNIMARC there are only fixed subfields.

4. Valid Indicators

Enter the possible values of each indicator, using a comma to separate the values of the first indicator from those of the second. Enter a B for a blank.

For example, to show that the first indicator could be a 0, 1 or 2 and that the second indicator could be a blank, 0 or 1; enter: 012,B01.

Second, the subfields of the tag are defined as well as any print constants for the OPAC.

Subfields entered

As subfields are entered, they are displayed on this line.

5. Subfield

Enter the subfield code.

Repeatable

Y if the field is repeatable, N if not.

Required

Y if the field is required, N if not.

Fixed field

Y for a fixed field, N if not. If Yes, see *Defining a Fixed Field*.

Pre-punctuation

Used in the French version of ADVANCE. Enter the character that will precede this subfield in the detailed display of the OPAC. Use B for a blank.

Post-punctuation

Used in the French version of ADVANCE. Enter the character that will follow this subfield in the detailed display of the OPAC. Use B for a blank.

Once a subfield is defined, the system returns to the s*ubfield* prompt. Enter the next subfield code to define, or <ENTER> for the command line.

After defining a tag and its subfields, enter FILE, or EXIT to quit. You will return to the Tag or (L)eader prompt, where you can enter the next tag or <ENTER> to return to the menu.

Modifying an Existing Field

If an existing tag is entered, its parameters will be displayed.

To modify a parameter, enter its line number and type the modification over the old data.

To delete a subfield, use the command Del Subfield.

To delete a tag, use the command `Delete`.

`FILE`, or quit with `EXIT`.

Defining a Fixed Field

This procedure can be used for both fixed fields and fixed subfields.

Adding a New
Fixed Field

In *Bibliographic Tag & Subfield Edit Checks* (BTSE) or *Authority Tag & Subfield Edit Checks* (ATSE), if the response to *Fixed Field?* is Yes, the FIXED FIELD FORMAT & EDIT CHECKS screen appears.

```
                   FIXED FIELDS FORMAT & EDIT CHECKS


    1) Display label        : Bibliographic level
    2) (L)eader / (T)ag     : L
    3) Beginning column     : 7
    4) Length of field      : 1
    5) Default character(s)  : m

    6) (U)pper / (L)ower case : L
    7) Allowed entry length  : 1
    8) Required entry length : 1


    9) Code prefix          :
   10) Numeric (Y/N)        : N
   11) Yes/No answer (Y/N)   : N
   12) Valid entries        : a,b,c,d,m,s



   Options:                                      <ENTER> = scroll options
     ? = ? help       # = # line       L = Line by line  FI = File
```

Fixed field data are defined by position. For example in tag 100, subfield a of UNIMARC, positions 0-7 are the date of creation, and position 8 is the code for the date of publication.

In ADVANCE, fixed fields are divided into sections. Each section corresponds to a unit of data. In the above example, the first section would be positions 0-7, and the second, position 8.

In order to define a section its position and length must be known.

1. Display Label

Enter the name of the section as it will be displayed during cataloguing (maximum 24 characters).

2. (L)eader/(T)ag | Enter T if it is part of a tag, or L if the section is part of the leader. If it is part of the leader see *Defining the Leader*.

3. Beginning of column | Enter the starting position of the section. Start to count from 0. (Maximum 4 characters).

4. Length of field | Number of characters in the section. (Maximum 4 characters).

5. Default Characters | Default values which will appear during cataloguing.

6. (U)pper/(L)ower case | Enter U if the section should be entered in uppercase, or L for lowercase.

7. Allowed entry length | Maximum number of characters that may be entered.

8. Required entry length | Minimum number of characters that must be entered. Leave this blank if you do not always want to require data entry.

9. Code prefix | If the data should be controlled by a code format, enter the code of that format. For example, COUNTRY for country codes.

10. Numeric | N if the data is alpha-numeric, or a blank. Y if the data is numeric.

11. Yes/No answer | Y if the data will be a yes/no response, or N if not.

12. Valid entries | Enter the valid data, separating different values with a comma (without spaces).

If the data to be entered cannot be predicted (dates for example), leave this blank.

If the data will come from a code format, leave this blank.

FILE or quit with EXIT. Define the next section with the command Add # until the field is completed. Some fields will only have one section while others will be more complex.

Once all sections are defined, use FL to define the total length of the field, and file with FILE.

NOTE: You can define length at any time.

Modifying an Existing Fixed Field

Answer Yes to the Fixed Field prompt, and the existing sections of the field will be displayed.

To modify the contents, enter the line number. Type over the old data.

To add a section, use the command Add #, where # is the line of the section to be added.

To delete a section, use the command Delete #, where # is the line number of the section.

FILE the records, or quit with EXIT.

If the number of sections, or the length of a section has been modified use the FL command to update the total length of the field.

Defining the Leader

The leader is defined in *Bibliographic Tag & Subfield Edit Checks* (BTSE) or *Authority Tag & Subfield Edit Checks* (ATSE).

It can also be defined in workforms, *Bibliographic Cataloguing Workforms* (BCW) or *Authority Cataloguing Workforms* (ACW). This is useful if the default values of the leader are different in the workforms linked to one format. See *Creating Workforms*.

In *Bibliographic Tag & Subfield Edit Checks* (BTSE) or *Authority Tag & Subfield Edit Checks* (ATSE), after entering the format code, enter L in the field Tag or (L)eader.

This will place you in the FIXED FIELDS FORMAT & EDIT CHECKS screen. Create the sections of the leader in the same way as for a fixed field, except that an L should be entered at the prompt (L)eader/(T)ag.

The full leader will not be entered during cataloguing. In fact, some of the data will be generated automatically only when the record is exported. The internal ADVANCE leader does not have the same positions as the MARC leader. Instead a conversion table in UNIVERSE manages the positions during exportation.

To define the leader of a new format, refer to the leader of a format already established by Geac.

Defining Codes for MARC Fixed Fields

In certain MARC fixed fields, the cataloguer must enter codes. For fields with many codes, a list may be consulted by entering `??`. This list must first be created in the *Fixed Field Codes* function.

In USMARC and UNIMARC, codes are required for country and language (`CSCC` and `CSLC`). In UNIMARC there are also codes for function, musical form, and instrumentation (`CODFCT`, `CODFOR`, and `CODINS`).

The link between a code format and a field is made in *Bibliographic Tag & Subfield Edit Checks* (`BTSE`) - *Defining Fixed Fields* in the *Code Table* field.

When a code format (`CSCC`, `CSLC`, `CODFCT`, `CODFOR`, or `CODINS`) is entered, the list of codes is displayed.

Each code is made up of one field, the code description.

To add a code, type `A`, then enter the code and its description.

To modify a code description, type its line number. Then type 1 to enter the description field and type the new description over the old one.

To modify a code, delete it with the command `DELETE` and then add it as a new code.

`FILE` or `EXIT` to quit.

Creating Workforms

Templates are created in *Bibliographic Cataloguing Workforms* (BCW) and *Authority Cataloguing Workforms* (ACW) for authority cata- loguing. They are created in the same way. The information to enter is:

• the cataloguing format to which the template is linked;

• every tag and its default indicators;

• for each tag, the subfields and their default values.

NOTE: ADVANCE allows you to create repeated tags and subfields. Use the *Occurrence number* field to count the number of times a tag or subfield is repeated. In previous releases, tags could not be repeated in a workform.

The workform assigned to the cataloguer by default is controlled in the functions Bibliographic Cataloguer's Work Screen (BCWS) and Authority Cataloguer's Work Screen (ACWS).

On entering the workform function, the following screen is displayed:

```
              DEFINE CATALOGUING WORKFORM

      Format        :   BK        Book & monographs
      Workform Name  :   BK

      Tags Entered   :   8,10,20,40,100,100,245,260,300,500,650,852,856,953,
                         953
 1) Marc Tag or (L)eader   : 953  Geac local tag
    Occurrence number      : 2
    Modify Fixed Field (Y/N) : N
    Default Indicators     :

    Subfields Entered      : b,b

 2) Subfield              : b     Location (Inst, Sublocation, Collection)
    Occurrence number      : 2
    Modify Fixed Field (Y/N) : N
    Default Data           :
 Valid Subfields   :      b,c,e,h,i,j,k,m,n,p,t,u,w,x,z
 Valid Indicators  :      B,B,,,,,,,
Options:
  # line   File   Delete   Fixed field update   Delete tag.occ
  Delete tag.occ.subfield.occ   Copy   ? help   Exit
```

NOTE: Type a period to move to the previous prompt. If you type a period at the Subfield prompt, the cursor moves to the *Marc Tag or (L)eader* prompt.

Format

As the workform is a subset of a bibliographic format, first enter the code of the format in which you want to work. Enter ?? for the list of existing formats.

Workform Name

Enter a workform name (maximum 20 characters) <ENTER>. The system will display the list of existing templates. To add a new one, enter its name. The system will prompt:

```
This is a new record. Do you wish to continue? (Y/N).
```

Enter Y to continue, or N to quit.

Fill in the following fields as described:

Tags Entered

Tags already assigned to the workform are displayed.

1) MARC tag or (L)eader

Enter the tag of the first field for the format. The name of the tag, its subfields and valid indicators will display. The tag must already be part of the format in which you are working.

Tags and subfields must be entered in the order of the MARC format.

Occurrence number

The system prompts for an Occurrence number if the tag is not a fixed field. The default value is 1 if this is the first occurrence of the tag, or increments to the next highest number if this is a multiple occurrence. For example, 3 will be the default if 2 occurrences of the tag already exist. When an additional tag is added, the tag appears multiple times in the *Tags Entered* field. If you use the *Overlay workform* function, tags will be added in ascending order, ignoring the order that appears on the workform.

Modify fixed field (Y/N)

This field allows you to define sections of a fixed field at the template rather than the format level. This permits default values to be entered for each template of a format.

Type N to keep the definition of the fixed field format. Type Y to change it. This will take you to the FIXED FIELD FORMAT & EDIT CHECKS screen.

Default indicators

Enter the indicators without spaces or punctuation.

2) Subfield	Enter the first subfield of the tag being added.
Occurrence number	The system prompts for an Occurrence number when the Subfield field is selected. The default value is 1 if this is the first occurrence of the subfield, or increments to the next highest number if this is a multiple occurrence. For example, 3 will be the default if 2 occurrences of the subfield already exist. When an additional subfield is added, the system lists the subfields, grouping multiples occurrences together. Subfields are listed in ascending order with numeric subfields followed by alphabetic.
Modify fixed field	This is the same as the field above, except that it now refers to a subfield.
Default Data	The data entered here will appear by default in the subfield during cataloguing with this template.

Repeat this process until every subfield has been entered for the tag. Then, <ENTER> to return to the Tag or Leader prompt which will allow you to enter the next tag of the template.

Continue until all the tags have been added, then, at the Tag or Leader prompt, <ENTER> to return to the command line. FILE the template.

Copying a Workform to Create a New One

If an existing workform is quite similar to one that must be created, it can be copied and modified. This simplifies the creation of a new workform.

Type the code of the format in which you want to work, then enter the name of the workform to be created. When the cursor is at the `Tag or Leader` prompt, <ENTER> to display the command line.

Type `CO` or select the `Copy` option to get the prompt `Name of template to be copied`. Enter the name of an existing template. Its elements will be copied to the new template.

Modify the new template as required and file with `FILE`.

Modifying a Workform

Enter the format code that you want to modify. Its fields will display, along with the command line.

Adding a Field

To add a tag, type `1` to put the cursor on the `Tag` or `Leader` field and enter the tag number.

To add a subfield, first enter its tag, then type the subfield code in the `Subfield` field.

Deleting Fields or Subfields

Use the *Delete tag.occ* option to remove a specific occurrence of a tag in a workform. For example, to delete the first occurrence of tag `852`, enter `852.1`. To delete the second occurrence of tag `852`, enter `852.2`

Use the *Delete tag.occ.subfield.occ* option to delete a specific occurrence of a subfield from a specific tag in a workform. For example, to delete the second occurrence of subfield b in the first occurrence of tag 852, enter `852.1.b.2`. The format of the command is ttt.nnn.s.ooo where ttt is a valid tag number (1-3 digits), nnn is the occurrence number of the tag that you want to delete the subfield from, s and ooo define the subfield and the occurrence of the subfield that you want to delete.

Modifying or Deleting Default Indicators

To add a tag, type `1` to put the cursor on the `Tag` or `Leader` field and enter the tag number.

At the *Default Indicators* field, type over the existing data with the desired indicators.

To delete indicators, place the cursor on the indicator and type **#**.

Modifying or Deleting Default Data

Type `1` to put the cursor on the `Tag` or `Leader` field and enter the tag number.

At the `Default Data` field, type over the existing data with the desired information.

To delete, place the cursor on the *default values* field and type `#` <ENTER>.

`FILE` or quit with `EXIT`.

Deleting a Workform

Retrieve the template using the format code and the workform name. Its fields will display, along with the command line.

Enter `Delete`. The system will prompt:

`Are you sure? (Y/N).`

Enter `Y` to delete it or `N` to quit.

4

Holdings Setup

The HOLDING SETUP MENU allows you to maintain the codes tables for the holdings module. These codes perform the following functions:

- specify where your holdings are located

- determine what holdings information is displayed and how the screen is formatted

- specify certain parameters used for serials control.

These codes are grouped into categories that indicate their general maintenance requirements.

Changes from prior releases are also noted.

Overview

The HOLDING SETUP MENU allows you to maintain all the codes tables that are required in the holdings function. Some tables are common to other modules as well as Holdings. For example, the Publication Pattern Type (PUBP) table is also accessible from Serials. Since the screen identifiers are the same, any change made in one module is immediately reflected in the other module.

Broadly speaking, these codes allow you to define:

- where holdings are located.

    a. Institution Codes (CHIC)

    b. Sublocation/Building Codes (CHSC)

    c. Call Number Prefix Codes (CHPC)

    d. Classification Number Codes (CHNC)

    e. Default Price Tag (CDPT)

- how holdings information is displayed to your staff.

    a. Holdings Display Definition – Provides a submenu that lists all the holdings display screens, such as Location Copy Summary, Pieces Summary, Parts Summary, and so forth. From these tables you can specify the information displayed and the screen layout.

- what information is maintained for use in serials control. This category includes tables that are used for a variety of purposes such as making predictions, automating claim cycles and retaining addresses for shipto locations.

    a. Publication Pattern Type

    b. Frequency Codes

    c. Chronology Codes

    d. Checkin Type

    e. Physical Format

    f. Claim Message Codes

    g. Claim Cycle Codes

    h. Shipto Codes

i. Numbering Codes

j. Publication Regularity

k. Publication Regularity Labels.

Required Tables

Default values are provided for some tables such as the Holdings Display Definition. These tables determine the screen content and layout that is displayed to staff who are using the Holdings function.

Tables Containing Critical Information for Holdings – Must be Edited

- Shipto Codes – Copy sets that do not have a Shipto code assigned to them will be assigned a default value when the database is converted. Any copy set that does have a Shipto Code will retain that code during conversion.

- Institution, Sublocation, Collection Codes

- Call Number Prefix and Classification Number Codes

- Claim Cycle Codes

Tables Containing Default Information That May Require Editing

- Holdings Display Definition

- Claim Message Codes

- Frequency Codes

- Chronology Codes

- Checkin Type

- Publication Regularity

- Publication Regularity Labels

Tables Containing Standard Information That May Require Occasional Maintenance

- Physical Format

- Default Price Tag

- Publication Pattern Type

- Numbering Codes

Changes from Prior Releases

The Holding Setup Menu Institution, Sublocation, Collection, Call Number Prefix, Classification Number, and Default Price Tag codes are available from Circulation and Cataloguing using the CHSM screen identifier.

Shipto and Claim Message Codes are accessible from Holdings, Acquisitions, and Serials.

Codes available from Holdings and Serials include: Publication Pattern Type, Frequency Codes, Chronology Codes, Checkin Type, Claim Cycle Codes, Numbering Codes, Publication Regularity, and Publication Regularity Labels Codes.

The Holdings Display Definition (HDD) replaces the Pieces Summary (OPS) setup tables formerly available from the Online Search Setup screen.

Chronology Codes (CHRN) allow split year definitions.

New Frequency Codes (FREQ) codes are provided for frequencies of every 4, 5, and 10 years.

The Publication Regularity (PREG) table provides a new code that permits you to specify the exact date(s) an item is published.

The Checkin Type (CHKT) table allows you to define how gaps should be treated on your Holdings Statements.

The screen identifier for Publication Pattern Type Codes has changed from PATT to PUBP.

The Checkin Identifier (CHKI) has been removed from the system.

A new code, Physical Format (PHYS) has been added. Physical format is defined in the USMARC 007 field, positions 1 and 2.

The COPY SET EDIT screen no longer exists and is now named the SERIAL COPY SET DETAIL.

Holdings Setup Menu

Enter CHSM on any cataloguing menu to reach the Holding Setup Menu or select it from the Cataloguing Holdings Menu.

```
DD MMM YYYY          Geac ADVANCE Library System (#.##)        PPPPPP   IIII
   HH:MM                      Your Library Name

                         HOLDING SETUP MENU



     1. CHIC    Institution Codes          10. CHRN    Chronology Codes
     2. CHSC    Sublocation/Building Codes  11. CHKT    Checkin Type
     3. CHCC    Collection Codes            12. PHYS    Physical Format
     4. CHPC    Call# Prefix Codes          13. CLMSG   Claim Message Codes
     5. CHNC    Class Number Codes          14. CLMCD   Claim Cycle Codes
     6. CDPT    Default Price Tag           15. SHPTO   Shipto Codes
     7. HDD     Holdings Display Definition 16. NUMB    Numbering Codes
     8. PUBP    Publication Pattern Type    17. PREG    Publication Regularity
     9. FREQ    Frequency Codes             18. PREGL   Publication Reg. Labels




          Enter the number of your selection and press <ENTER>
                    or  ?  followed by <ENTER> for Help.
               Press <ENTER> to return to previous level :
```

Institution Codes (`CHIC`)

Access   Enter `Institution Codes` (`CHIC`), on the `Holding Setup Menu` (`CHSM`) to display the `Institution Codes` screen. The screen shows a list of sample institution codes. Institution codes are the broadest level of holdings designation in ADVANCE.

```
                    INSTITUTION CODES TABLE


     Number of Records:4
     Codes   Description of codes
     ──────-  ─────────────────────
  1. APL     ADVANCE Public Library
  2. AU      ADVANCE University
  3. GOV     Government Library
  4. PUB     Local Public Library




 Options:
  ? help  Add item   # line   Print   Forward   Backward   Search jump
  Exit
```

Editing   Institution codes can be added, modified, deleted and printed. To modify
Institution Codes   or delete existing codes, first enter the number corresponding to the desired institution from the above screen. The system displays all pre-defined information.

```
                  INSTITUTION CODES

     INSTITUTION CODE : AU
     ----------------------------------------------------------------
  1. Institution Name                 : ACADEMIC LIBRARY STANDARDS
  2. Name Displayed In OPAC(max. 6 ch.): ACAD
  3. 049 Institution Prefix           : ALS
  4. Loan Code Override Level (1-99)   : 80
  5. Circulation Code (Default #5)     : GEN1 = GENERAL COLLECTION LOANS (2+
  6. Material Group Code (Default #5)  : DCGC = DEFAULT MATERIAL GROUP CODE
  7. Only Holding level (1 = Yes)      :
        Loan periods
  8. Disable Rebuild of (1 = Yes)      :
     Loan Tables During Checkout
  9. Notice Header for Institution.    :
 10. Suppress display from OPAC (1=Yes): 0
 11. NUC Symbol for this institution   : CaOMain

     Valid Sublocations/Buildings      : CAM2,CAM1,CAM3,LRC,NEW2,ALII

Options:
  ? help   # line   Line by line   Copy   Print   Delete   Exit
```

To edit a code record field, enter the line number. Use the *Delete* command to remove the code record permanently from the system. To save changes, use the *File* command. Use the *Exit* command to exit without saving any changes.

To add new institution codes to the existing list, use the *Add* command. The system prompts:

```
 Enter the code you wish to add. :
```

Enter one to 13 characters for the institution code to be created. The following blank definition screen is generated when an institution code is entered.

```
                         INSTITUTION CODES

     INSTITUTION CODE : new                          *** New Record ***
     -------------------------------------------------------------------
  1. Institution Name              :
  2. Name Displayed In OPAC(max. 6 ch.):
  3. 049 Institution Prefix        :
  4. Loan Code Override Level (1-99)   :
  5. Circulation Code (Default #5)  :
  6. Material Group Code (Default #5) :
  7. Only Holding level (1 = Yes)   :
        Loan periods
  8. Disable Rebuild of (1 = Yes)   :
     Loan Tables During Checkout
  9. Notice Header for Institution. :
 10. Suppress display from OPAC (1=Yes):
 11. NUC Symbol for this institution  :

     Valid Sublocations/Buildings    :
```

Enter the definition for each field of the record. When the last field is completed or skipped, the command options appear at the bottom of the screen. Remember to save newly-created codes by using the *File* command. Definition of valid Sublocation/Buildings codes are explained in *Sublocation Codes*; they can not be modified from this screen.

1. Institution name   [text]

Displays the Institution name along with the Institution code, on item records, or displays the Institution name when an Institution code is selected from a browse list.

2. Name Displayed in OPAC   [6 characters]

This field allows an abbreviated descriptive name for display in the OPAC Brief and Summary displays. This name is also displayed on summary screens defined by Holdings Display Definition (HDD) and by OPAC Holdings Display (OHD).

3. 049 Institution Prefix   [Bibliographic utility code or blank]

Identifies the MARC holding code which identifies this Institution in your cataloguing utility (OCLC, RLIN, etc.). When tapeloading or down-loading records from the utility, ADVANCE generates one item record for

each occurrence of this Institution prefix in the 049 field. If your library uses the 852 field for item specific data while cataloguing, ADVANCE uses the Institution Prefix from that field.

4. Loan Code Override Level

[1 - 99]

The number entered into this field determines the priority of this Holding code when compared with other levels of Holding codes assigned to the same item record. Within holdings setup, the level with the highest number determines the Circulation code chosen to determine loan periods. (See field 5 for default Circulation Code). Every level of the Holding Code hierarchy allows a Loan Code Override Level to be set. If the level is high (99 is the highest), the Circulation Code defaulted at that level will always be selected. If the level is low (0 is the lowest), the Circulation Code at this level will always be overriden by one with a higher priority. If the library puts Circulation Codes in the item record directly (for example, rather than having them derived from Holding code), that level is automatically set to 98. Generally, the level where the library wants the Circulation policy to be determined is the one given the highest priority. This might be at the Sublocation (example, Branch level), or the Collection (example, departmental level), or at the Call number prefix (example, format or shelving location level). Usually the library wants circulation policies established at a more specific location/level than the Institution, so the value in the Loan Code Override Level field of Institution is often lower than that of other Holding Code levels.

5. Circulation Code (Default#5)

[Any circulation code]

Use a circulation code as defined in Circulation Codes (CCC) on the Loans Periods Menu.

6. Material Group Code (Default #5)

[Any Material Group Code, usually DCGC, or blank]

Displays the default Material Group Code (Default #5) and it's description for this Institution. The actual codes must be entered when modifying or adding code records. Available codes can be displayed by entering two question marks (??). These codes define circulation policies and rules, rather than where the material is shelved.

7. Only Holding level loan periods (yes or no)

[0 or 1]

0 (no) If a circulation code occurs on the item record, the system checks the loan matrix for a circulation code that supersedes it.

1 (yes) If a Circulation Code is found on the item record, it does not have to check all the higher levels. Normally at checkout, the system checks all Holding Code levels to determine which level has the highest priority and uses that level's *Default Circulation Code*. If the library uses Circulation Codes in item record, **and** sets this field to 1 (yes), it can enhance system performance and efficiency.

8. Disable rebuild of Loan Tables During Checkout

[0 or 1]

0 (no) The loan matrix is rebuilt each time a patron checks out an item whose circulation code is not linked to that patron group code.

1 (yes) Usually this field is set to 1. The system builds the loan matrix once — the first time a patron of a Patron Group Code checks out an item assigned to a Circulation Code not linked to the Patron Group Code.

9. Notice Header for Institution

[Any Notice Header Code]

This field accepts a code defined in Notice Headers by Location (COPN), under the Output Production Menu (COPM). Available codes can be displayed by entering two question marks (??). The Notice Headers by Location (COPN) table allows you to create a four line display of library name, address, telephone number, and/or message which prints at the top of all patron notices produced for this institution. Individual notice header codes can also be specified for sublocations within Institutions.

10. Suppress display from OPAC

[0 or 1]

Suppresses the display of holdings for a bibliographic item.

0 (no) All holdings are shown on the OPAC item display (Brief or Full Display Screens).

1 (yes) All holdings (both monographs and serials) in the location are suppressed from the OPAC item display (Brief or Full Display Screens). Staff searches from the other modules are unaffected.

11. NUC Symbol for this institution	Alphanumeric
	Enter the USMARC code that identifies this institution. To obtain these codes, see *Symbols of American Libraries* which is maintained by the Library of Congress. This code identifies the holdings of this institution and is exported in the 852 $a field.
Valid Sublocations/ Buildings	This field cannot be edited from this screen. The valid Sublocations/ Buildings associated with this Institution Code are automatically derived from the Institution Codes specified for the Sublocation/Building codes defined in the next table.

Where Used

The system displays the Institution Code on the following screens:

- LOCATION COPY DETAIL – in the *Institution* field.

- SERIAL COPY SET DETAIL – in the *Location* field.

- Mass Holdings Update – in the *Institution* field.

(NOTE: Holdings display fields may vary depending on choices made on the HOLDINGS DISPLAY DEFINITION setup screens.)

Sublocation Codes (`CHSC`)

Sublocation codes define units within an institution. They may refer to a building or complex. An institution may have many sublocations. Sublocation code definition includes:

- the institution to which the sublocation belongs,

- the loan code override level,

- the default circulation and material group codes,

- how items are allowed to be circulated, routed, or returned,

- various parameters to control the OPAC holds function.

Access   Enter `Sublocation/Building Codes (CHSC)`, on the `Holding Setup Menu (CHSM)` to display the `Sublocation Codes` screen. The screen shows a list of sublocation codes.

```
                SUBLOCATION CODES TABLE


    Number of Records : 7
    Codes      Description of codes
    ─────      ──────────────────────────
 1. ALII      AU Main Library & Info. Center
 2. BRA1      Public Library Branch #1
 3. BRA2      Public Library Branch #2
 4. CAM1      University Campus #1
 5. CAM2      University Campus #2
 6. LAWS      University Law Library
 7. MAIN      Main Public Library




Options:
? help  Add item  # line   Print   Forward   Backward   Search jump
Exit
```

Sublocation codes can be added, modified, deleted, and printed. To modify or delete existing codes, enter the number corresponding to the desired sublocation from the screen.

The system displays all of the predefined information.

```
                      SUBLOCATION CODES


    SUBLOCATION CODE : CAM1
    ------------------------------------------------------------------
  1. Sublocation Description                     : Academic Library MAIN +
  2. Name Displayed In OPAC                      : CAM1
  3. Institution/Agency                          : AU = ACADEMIC LIBRARY +
  4. Loan Code Override Level (1-99)             : 80
  5. Circulation Code (Default #4)               : GEN1 = GENERAL COLLECT+
  6. Material Group Code (Default #4)            : DCGC = DEFAULT MATERIA+
  7. Return to Original (1=subl. ; 2=port)       :
  8. Route to Original Sublocation (1=yes)       : 1
  9. Type of hold function allowed              :
     (0=none,1=title hold,2=holds screen)
 10. Display names on holds (0=No, 1=yes)        :
 11. Allow patrons to CANCEL holds (0=No,1=Yes)  : 1
 12. Block codes that prevent holds (e.g. 2,6)   :
 13. Notice header code for this location        :
 14. Suppress display from OPAC (1=Yes)          :

Options:
 ? help   # line   Line by line   Copy   Print   Delete   Exit
```

To change a field of an existing code record, select the line number option and enter the specific line number. Use *Delete* to permanently remove a code record from the system. To save a change made, use the *File* command. Use the *Exit* command to exit without saving changes. To add new sublocation codes to the list, use the *Add* command on the screen listing existing Sublocation/Building codes. The system prompts:

```
 Enter the code you wish to add. :
```

Enter one to thirteen characters for the new sublocation code record. When you enter the new code, the system displays a blank definitions screen.

```
                          SUBLOCATION CODES

       SUBLOCATION CODE : ALII
       ------------------------------------------------------------------
   1. Sublocation Description                    : Academic Library II
   2. Institution/Agency                         : AU = ACADEMIC LIBRARY +
   3. Loan Code Override Level (1-99)            : 80
   4. Circulation Code (Default #4)              : GEN1 = GENERAL COLLECT+
   5. Material Group Code (Default #4)           : DCGC = DEFAULT MATERIA+
   6. Return to Original (1=subl. ; 2=port)      :
   7. Route to Original Sublocation (1=yes)      : 0
   8. Type of hold function allowed              : 2
      (0=none,1=title hold,2=holds screen)
   9. Display names on holds (0=No, 1=yes)       : 1
  10. Allow patrons to CANCEL holds (0=No,1=Yes) : 1
  11. Block codes that prevent holds (e.g. 2,6)  : 2,6
  12. Notice header code for this location       : AU = Header for agency+
  13. Suppress display from OPAC (1=Yes)         :


  Options:
   ? help   # line   Line by line   Copy   Print   Delete   Exit
```

Enter the definition for each field of the record. Save newly created codes by using the *File* command.

1. Sublocation Description

[text]

This free text description appears, along with the Code, on all browse screens from which this code can be selected. It also appears on the detailed item record for items with this sublocation. It does not appear on public or staff search screens, only the code appears there.

2. Name Displayed In OPAC

[text]

This field allows an abbreviated descriptive name for display in the OPAC Brief and Summary displays. This name is also displayed on summary screens defined by Holdings Display Definition (HDD) and by OPAC Holdings Display (OHD).

3. Institution/Agency

[Institution code to which this sublocation is linked]

This field links sublocation codes to institution codes. When a valid Institution Code is entered here, the sublocation code automatically

displays in the *Valid sublocation/building* list of the Institution record. Many sublocations can refer back to the same Institution.

4. Loan Code Override Level	[1 - 99]

Determines whether the Circulation Code, if any, associated with this Sublocation should take priority over any other level of Holding Code entered into an item record. Within holdings setup, the level with the highest number determines the loan period. If the level is high (99 is the highest), the code may never be overridden. If the level is low (0 is the lowest), the code may always be overridden. If the library sets circulation policies at the Sublocation level (example, Branch, rather than a department within a Branch) then this field should be higher than that in **lower level** holdings codes. If the library sets circulation policies at more specific levels, for example for individual departments, or shelving locations, then this field should be set at a lower level to allow the more specific location to take priority.

5. Circulation Code	[Any Circulation Code or blank]

A Circulation Code can be entered for each Sublocation. The system uses this circulation code as the default for all materials associated with this Sublocation, if the Loan Code Override Level is high enough. If the library does not want the Sublocation to serve as the controlling location for defining circulation rules then this field should be blank, or the Loan Code Override level be set very low, for example to 10.

6. Material Group Code	[Any Material Group Code, usually DCGC, or blank]

Each Sublocation should have a default Material Group Code. In most cases, there will be a single system default of Default Material Group (DCGC) code for all Sublocations in the system.

7. Return to Original (1=subl.; 2=port, blank)	[1, 2, or blank]

This field, and the one which follows, control the system's activities when a checked out item is returned.

[blank]   The item can be returned to any sublocation.

[1]   Return to original sublocation. The item must be checked in at the items sublocation.

[2]	Return to original port. The item must be checked in at the checkout port.

8. Route to Original Sublocation (1=yes)

[0 or 1]

[0]	Do not produce a route-to slip for items from other sublocations that are returned to this port.
[1]	Produce a route-to slip. Items belonging to this sublocation should be routed to this sublocation when checked in at a different sublocation.

Fields 9 - 12

These fields control how patrons place holds from OPAC. If the library does not permit patrons to place their own holds, then these fields can be set to 0 (no). These options are controlled by the sublocation of the port where the patron is placing the hold (See *Systems Utility Menu* Port Definition [PORT]), rather than the sublocation entered into the item record, which identifies who owns, or shelves, the item. Patrons at a given sublocation can view and, if allowed, place holds on items owned by other sublocations.

9. The Type of hold function allowed:

[0, 1, or 2]

[0]	Answer 0 (none) to prevent Online Catalogue users from placing holds.
[1]	Allow Online Catalogue users to place holds quickly from the **Hold title** option at the Brief or Detail Display of a title. The Hold Queue screen is not accessible to patrons if this field is set to 1. Patrons can select the title, receive confirmation of their hold (or exception messages as appropriate), and be informed of a default hold expiration date.
[2]	Allow Online Catalogue users to access the Hold Queue Display via the **Holds** option at the Brief or Detail Display of a title. They can then place holds in the same manner noted above using the **Hold** option. This screen also allows users to view their own Hold Queue via the *Show/Cancel* option. Patrons can also cancel their own holds using this option.

10. Display names on holds

[0 or 1]

This field has an effect only if field 8, to allow Online Catalogue users to access the Hold Queue Display, is answered 2.

0 (no)   Suppresses the display of patron names in the hold queue, when it is accessed from OPAC. Most libraries answer 0 (no) to maintain patron privacy.

1 (yes) Show the names and barcodes or users with holds in the Hold Queue Display. This setting affects access to the Hold Queue Display from OPAC only. Staff always have access to patron names and barcodes when placing/searching for holds from the Circulation module.

11. Allow patrons to   [0 or 1]
CANCEL holds

This field has an effect only if field 8, to allow Online Catalogue users to access the Hold Queue Display, is answered 2.

0 (no)   Prevents Online Catalogue users from cancelling their own holds, even if they otherwise have access to the Hold Queue Display and to their own Holds by Patron list.

1 (yes) Allow Online Catalogue users to cancel their own holds. At the Hold Queue Display patrons would be allowed to select the *Show/Cancel* option to see their own Holds by Patron screen. From there they would be able to select the *Cancel #* or *Cancel all* options.

12. Block codes that   [Any Transaction Code]
prevent holds

The library can specify (by block code number) which patron blocks (from the Circulation Transaction Code [CTC] table), should prevent an Online Catalogue user from placing or cancelling holds. These codes also prevent a user from accessing the HOLD DETAIL SCREEN, and their own Holds by Patron screen. Multiple block codes can be specified. Administrative blocks always prevent user access.

13. Notice Header code   [Any Notice Header Code]
for this location

This field accepts a code defined in Notice Headers by Location, under the Output Production Menu (COPM). Available codes can be displayed by entering two question marks (??). The Notice Headers by Location (COPN) table allows you to create a four line display of library name, address, telephone number, and/or message which prints at the top of all patron notices produced for this sublocation.

14. Suppress display
    from OPAC

[0 or 1]

Suppresses the display of holdings for a bibliographic item.

0   All holdings will be shown on the OPAC item display (Brief or Full
    Display Screens).

1   All holdings (both monographs and serials) in the location will be
    suppressed from the OPAC item display (Brief or Full Display Screens).
    Staff searches from the other modules are unaffected.

Where Used

The system displays the Sublocation Code on the following screens:

- LOCATION COPY DETAIL – in the *Sublocation* field.

- SERIAL COPY SET DETAIL – in the *Location* field.

- Mass Holdings Update – in the *Sublocation* field.

(NOTE: Holdings display fields may vary depending on choices made
on the HOLDINGS DISPLAY DEFINITION setup screens.)

Collection Codes (CHCC)

The collection codes describe an accumulated group of library materials contained within institutions and sublocations. Various collections within a library may have different circulation policies. The right column lists the default circulation code and material group code for each Collection Code. For instance, the default codes for RBR are RESD and DCGC.

Access   Enter Collection Codes (CHCC), on the Holding Setup Menu (CHSM) to display the Collection Codes screen.

```
               COLLECTION CODES TABLE

     Number or Records : 5
     Codes    Description of codes
     ──────    ─────────────────────────
  1. A/V     Audio-Visual Collection        AV1  DCGC
  2. DOCS    Documents Collection           SPEC DCGC
  3. MUSC    Music Collection               GEN2 DCGC
  4. RBR     Reserve Book Room              RESD DCGC
  5. SPEC    Special Collections            SPEC DCGC


Options: _
 ? help   Add item   # line   Print   Forward   Backward   Search jump
 Exit
```

Collection codes can be added, modified, deleted, and printed. To modify or delete existing codes, enter the number corresponding to the desired collection code. The system displays the following screen.

```
              COLLECTION CODES

   COLLECTION CODE : Large Print                    *** New Record ***
   -----------------------------------------------------------------
 1. Collection Description                :
 2. Name Displayed In OPAC                :
 3. Valid Sublocations/Buildings          :
 4. Loan Code Override Level (1-99)        :
 5. Circulation Code (Default #3)          :
 6. Material Group Code (Default #3)       :
 7. Institution/Campus (No sublocations)   :
 8. Return to Original                     :
       (1=collection; 2=port)
 9. Route to Original Collection (1=yes)   :
10. Suppress display from OPAC (1=Yes)     :
```

To change a field of an existing code record, select the line number option and enter the specific line number. Use *Delete* to permanently remove a code record from the system. To save a change, use the *File* command. Use the *Exit* command to exit without saving changes. To add new sublocation codes to the list, use the *Add* command on the screen listing existing Collection Codes. The system prompts:

```
 Enter the code you wish to add. :
```

Enter one to thirteen characters for a code for the record to be created. The system displays a blank definition screen. Enter the definition for each field of the record. Save newly-created codes with the *File* command.

```
                      COLLECTION CODES

     COLLECTION CODE : A/V
     ------------------------------------------------------------------
 1. Collection Description                 : Audio-Visual Collection
 2. Name Displayed In OPAC                 : A/V
 3. Valid Sublocations/Buildings           : ALII,CAM1,CAM2,CAM3,LRC
 4. Loan Code Override Level (1-99)         : 80
 5. Circulation Code (Default #3)           : AV1 = AUDIO VISUAL 1
 6. Material Group Code (Default #3)        : DCGC = DEFAULT MATERIAL GRO+
 7. Institution/Campus (No sublocations)    : AU = ACADEMIC LIBRARY STAND+
 8. Return to Original                      : 1
         (1=collection; 2=port)
 9. Route to Original Collection (1=yes)    :
10. Suppress display from OPAC (1=Yes)      : 0




Options:
 ? help   # line   Line by line   Copy   Print   Delete   Exit
```

1. Collection Description	[text]
	Appears along with the Code on all browse screens from which this code can be selected. It also appears on the detailed item record for items with this collection code. It does not appear on public or staff search results, only the code appears there.
2. Name Displayed In OPAC	[text]
	This field allows an abbreviated descriptive name for display in the OPAC Brief and Summary displays. This name is also displayed on summary screens defined by Holdings Display Definition (HDD) and by OPAC Holdings Display (OHD).
3. The valid sublocations/ buildings	[blank or one or more sublocation codes separated by commas, no spaces]
	This field relates collection codes to sublocations codes defined previously.
[blank]	If this collection is valid in all sublocations then the field should be left blank.

[sublocation code(s)]	If this collection is only valid at specific sublocations enter the valid sublocation(s). Several Sublocation/Building codes can be entered, separated by commas, no spaces.

4. Loan Code Override Level

[1 - 99 or blank]

Determines whether the Circulation Code, if any, associated with this Collection code should take priority over any other level of Holding Code entered into an item record. Within holdings setup, the level with the higher number determines the loan period. If the level is high (99 is the highest), the policy may never be overridden. If the level is low (0 is the lowest), the policy may always be overridden. If the library sets circulation policies at the Collection level (for example, the shelving location, rather than a department or a Branch) then this field should be higher than other holdings codes. If the library sets circulation policies at higher levels (for example for Branches or departments) then this field should be set at a lower level to allow the more general location to take priority.

5. Circulation Code

[Any Circulation Code or blank]

A Circulation Code can be entered for each Collection. The system uses this Circulation Code as the default for all materials associated with this Collection, if the Loan Code Override Level is high enough.

[blank

If the library does not want the Collection to serve as the controlling location for defining circulation rules then this field should be blank, or the Loan Code Override level be set very low, for example to 10.

6. Material Group Code

[Any Material Group Code, usually DCGC, or blank]

Each Collection should have a default Material Group Code. In most cases, there will be a single system default of Default Material Group Code (DCGC) for all Collections in the system.

7. Institution/Campus

[One Institution Code or blank]

A **Collection** can only be associated with one Institution in the system. Enter the code for the Institution to which this collection belongs.

8. Return to Original (1=collection.; 2=port)

[1, 2, or blank

This field, and the following, control the system's activities when a checked out item is returned.

1   If the library requires that an item be checked in only when it reaches its owning collection, then this field should be set to 1 (return to original collection)

2   If the library considers the item to be checked in when it reaches the checkout port, then this field should be set to 2 (return to original port).

[blank]   An item can be returned to any collection.

9. Route to Original Collection (1=yes)

[0 or 1]

If checked in at a different collection, route the item to this collection.

0 (no)   Does not assign a status.

1 (yes)   Assigns a status of on route to the item and produces a route-to slip.

10.Suppress display from OPAC

[0 or 1]

Suppresses the display of holdings for a bibliographic item.

1 (yes)   All holdings (both monographs and serials) in the location will be suppressed from the OPAC item display (Brief or Full Display Screens). Staff searches from the other modules are unaffected.

0 (no)   All holdings will be shown on the OPAC item display (Brief or Full Display Screens).

Where Used

The system displays the Collection Code on the following screens:

• LOCATION COPY DETAIL – in the *Collection* field.

• SERIAL COPY SET DETAIL – in the *Location* field.

• Mass Holdings Update – in the *Collection* field.

(NOTE: Holdings display fields may vary depending on choices made on the HOLDINGS DISPLAY DEFINITION setup screens.)

Call Number Prefix Codes (`CHPC`)

Call number prefix codes are used to identify classes of items more narrowly than collections. Examples of Call number prefix codes are PER for periodical, F for folio/oversize, and REF for reference. These might be collections identified by format (Video), by size (folio), or by shelving location (Rare Books, or Reference). Depending on the library's policies these Call number prefixes can be used to identify only shelving location, or circulation policies, or both. Note that more than one Call number prefix can share the same Circulation Code.

Access   Enter Call Number Prefix Codes (CHPC), on the Holding Setup Menu (CHSM) to display the Call Number Prefix Codes screen.

On the screen, the far right columns display Circulation and Material Group Codes. For example, the default circulation and material group codes for code 2 (FOL) are GEN1 and DCGC, respectively.

```
                      CALL NUMBER PREFIX


    Number of records : 11
    Code                  Description of code
   --------------------   -------------------------------------------
 1. FED                   FED                                GEN1  DCGC
 2. FOL                   Folio                              GEN1  DCGC
 3. FSTRIP                Film Strip                         AV1   DCGC
 4. N/C                   N/C                                N/C   DCGC
 5. RARE                  RARE                               RARE  DCGC
 6. REF                   REFERENCE ITEMS                    REF   DCGC
 7. VIDEO                 VIDEO                              AV1   DCGC



Options:
 ? help   Add item   # line   Print   Forward   Backward   Search jump
 Exit
```

Call number prefix codes can be added, modified, deleted, and printed. To modify or delete existing codes, enter the number corresponding to the desired call number prefix code. The system displays the following screen.

```
                        CALL NUMBER PREFIX

    CALL NUMBER PREFIX CODE : FOL
    ---------------------------------------------------------------------
 1. Call# Prefix Description             : Folio
 2. Valid Collections                    :
 3. Loan Code Override Level (1-99)       : 40
 4. Circulation Code (Default #2)         : GEN1 = GENERAL COLLECTION L+
 5. Material Group Code (Default #2)      : DCGC = DEFAULT CIRC GROUP C+
 6. Sublocations/Buildings (No collection) :
 7. Institution/Campus (No subcollections) : AU = ADDVANCE University



Options:
 ? help   # line   Line by line   Copy   Print   Delete   Exit
```

To change a field of an existing code record, select the line number
option and enter the specific line number. Use *Delete* to permanently
remove a code record from the system. To save a change made, use the
File command. Use the *Exit* command to exit without saving changes.
To add new Call number prefix codes to the list, use the *Add* command
on the screen listing existing Call number prefix codes. The system
prompts:

```
 Enter the code you wish to add. :
```

Enter one to twenty characters to represent the code record to be created.
The system displays a blank definition screen similar to the following
example for RARE.

```
                        CALL NUMBER PREFIX

    CALL NUMBER PREFIX CODE : RARE                    *** New Record ***
    ---------------------------------------------------------------------
 1. Call# Prefix Description             :
 2. Valid Collections                    :
 3. Loan Code Override Level (1-99)       :
 4. Circulation Code (Default #2)         :
 5. Material Group Code (Default #2)      :
 6. Sublocations/Buildings (No collection) :
 7. Institution/Campus (No subcollections) :



```

1. Call # prefix
   Description

   [text]

   This field, which may duplicate the code entered in the Call Number Prefix Code field, is a free text field to describe the Call number prefix. This description appears, along with the code, on all browse screens associated with this code table. It does not appear on public or staff search results, only the Code appears there.

2. Valid Collections

   [Collection Code(s) or blank]

   The collection(s) specified in this field, by code, are those for which this call number prefix is valid.

   Collection
   Codes(s)

   If this call number prefix is only valid at specific collections, you can control that by entering only the valid collection(s) into this field. Several Collection codes can be defined if they are separated by commas, no spaces.

   [blank]

   This call number prefix is valid in all collections on the system, i.e., this call number prefix applies generally.

3. Loan Code Override
   Level

   [1 - 99 or blank]

   Determines whether the Circulation Code, if any, associated with this Call number prefix code should take priority over any other level of Holding Code entered into an item record. Within holdings setup, the level with the higher number determines the loan period. If the level is high (99 is the highest), the policy may never be overridden. If the level is low (0 is the lowest), the policy may always be overridden. If the library sets circulation policies at the Call number prefix level (example, the shelving location, rather than a department or a Branch) then this field should be higher than other holdings codes. If the library sets circulation policies at higher levels (example, Branches, collections or departments) then this field should be set at a lower level to allow the more general location to take priority.

   [blank]

   If the library does not want the Call number prefix to serve as the controlling location for defining circulation rules then this field should be blank, or the Loan Code Override level be set very low, for example to 10.

4. Circulation Code

[Any Circulation Code]

A Circulation Code can be entered for each Call number prefix. The system uses this Circulation Code as the default for all materials associated with this Call number prefix, if the Loan Code Override Level is high enough.

5. Material Group Code

[Any Material Group Code, usually DCGC, or blank]

Each Call number prefix should have a default Material Group Code. In most instances, this will be a single system default of Default Material Group Code (DCGC) for all Call number prefixes in the system.

6. Sublocation(s)/ Building(s)

[Sublocation code(s) or blank]

Specifies the sublocation code(s) for which the Call number prefix is valid.

[Sublocation Code]

If this call number prefix is only valid at specific sublocations, enter the valid sublocation(s). Several Sublocation/Building codes can be defined, separated by commas, no spaces.

[blank]

If this call number prefix is valid in all sublocations on the system then the field should be left blank; that is, this call number prefix applies generally.

7. Institution

If you wish to specify that only certain defined institutions can have this as a valid Call number prefix, enter the code for the Institution in field 7. If this Call number prefix is valid for all institutions defined in the system, leave this field blank.

Where Used

The system displays the Call Number Prefix Code on the following screens:

- LOCATION COPY DETAIL – in the *Call # Prefix* field.

- SERIAL COPY SET DETAIL – in the *Location* field.

- Mass Holdings Update – *Call # Prefix* in the field.

(NOTE: Display fields may vary depending on choices made on the HOLDINGS DISPLAY DEFINITION setup screens.)

Classification Codes (CHNC)

Classification codes are the lowest level of the five-tier hierarchy of location codes. They may be truncated LC or Dewey Decimal classification numbers, such as H or HD, 6 or 699, or they may define items by format.

Access   Enter Class Number Codes (CHNC), on the Holding Setup Menu (CHSM) to display the Classification Codes screen.

```
                  CLASSIFICATION CODES TABLE


    Number or records:48
    Codes        Description of codes
    ──────   ─────────────────────────────
 1. CDISK        Compact disk
 2. FILM         Film reels, movie
 3. FILMSTRIP    Film strip
 4. KIT          Kit containing various related items
 5. MICROCARD    Microcard
 6. MICROFICHE   Microfiche
 7. MICROFILM    Microfilm
 8. MICROPRINT   Microprint
 9. NEWSP        Newspaper
10. PHONODISC    Phonograph disc
11. SLIDE        Slide cartridge
12. TAPE         Tape cassette
13. TRANSPARENCY Overhead projector transparency
14. VIDEOTAPE    Videotape cassette



Options:
 ? help   Add item   # line   Print   Forward   Backward   Search jump
 Exit
```

Classification codes can be added, modified, deleted, and printed. To modify or delete a code, enter the number from the screen above, for example, enter 2. The system displays the current information for the code, FILM, in the format of the following screen.

```
                        CLASSIFICATION CODES TABLE

     CLASSIFICATION CODE : FILM
     _____
 1. Classification                     : FILM
 2. Average Cost of Item               : 45.00
 3. Valid collections                  : AV= Audio-Visual Collection
 4. Loan Code Override Level (1-99)     : 90
 5. Circulation Code (Default #1)       : AV2= Audio Visual2
 6. Material Group Code (Default #1)    : DCGC=DEFAULT CIRC GROUP CODE
 7. Sublocations/buildings (No collection:
 8. Institution/campus (No subcollections: AU= University of Advance




 Options:
  ? help   # line   Line by line   Copy   Print   Delete   Exit
```

To edit a field, enter the line number.

To add a new classification code to the list, use the *Add* command at the initial browse list. The system prompts:

```
 Enter the code you wish to add :
```

Enter one to twenty characters to represent the code record to be created. The system displays a blank workform. Note that this field is not limited in length, but for display purposes, 20 characters is recommended.

```
                        CLASSIFICATION CODES TABLE

     CLASSIFICATION CODE :     MFILM                    **** New Record ****
     _____
 1. Classification                     : _____
 2. Average Cost of Item               :
 3. Valid collections                  :
 4. Loan Code Override Level (1-99)     :
 5. Circulation Code (Default #1)       :
 6. Material Group Code (Default #1)    :
 7. Sublocations/buildings (No collection:
 8. Institution/campus (No subcollections:
```

1. Classification

[text]

This field, which may duplicate the Classification code entered above, is a free text field to describe the Classification Code. This description appears, along with the Code, in item records having this classification code, and on all browse screens associated with this code table. It does not appear on public or staff search results, only the code appears there.

2. Average Cost of Item

[Price in the format `nnn.nn`, i.e., numbers separated by a decimal point, no currency symbol]

Used to calculate costs for lost or damaged items. The entry `Default Price Tag` (`CDPT`) allows the system to supply a default value from the MARC bibliographic record for the **Actual Cost** field in new pieces/item records. If, however, the library wishes to assess an average price for materials in a particular classification (example, to assess a higher price for art books), the amount can be entered into this field.   A general replacement cost can also be entered into `Circulation Codes` (`CCC`). If there is a value in the pieces record it takes precedence.

3. Valid collections

[Collection code(s), multiple codes separated by commas, no spaces, or blank]

Defines the collection code(s) for which this classification is valid.

If this classification is only valid at specific collections, enter the valid collections(s). Several collection codes can be defined in this field, separated by commas, no spaces.

[blank]

If this classification is valid in all collections on the system then the field should be left blank.

4. Loan Code Override Level,

[`1 - 99` or blank]

Determines whether the Circulation Code, if any, associated with this Classification code should take priority over any other level of Holding Code entered into an item record. Within holdings setup, the level with the higher number determines the loan period. If the level is high (99 is the highest), the policy may never be overridden. If the level is low (0 is the lowest), the policy may always be overridden. If the library sets circulation policies at the Classification level (example, the shelving location, rather than a department or a Branch) then this field should be higher than other holdings codes. If the library sets circulation policies at higher levels, example: Branches, collections or departments, then this

field should be set at a lower level to allow the more general location to take priority.

[blank]   If the library does not want the Classification Code to serve as the controlling location for defining circulation rules then this field should be blank, or the Loan Code Override level be set very low, example to 10.

5. Circulation Code   [Any Circulation Code]

A Circulation Code can be entered for each Classification code. The system uses this circulation code as the default for all materials associated with this Classification code, if the Loan Code Override Level is high enough.

6. Material Group Code   [Any Material Group Code, usually DCGC, or blank]

Each Classification Code should have a default Material Group Code. In most instances, this will be a single system default of `Default Material Group Code` (DCGC) for all Classification Codes in the system.

7. Sublocation(s)/ Building(s)   [Sublocation Code(s), multiple codes separated by commas, or blank]

The codes specified in this field are those for which this Classification Code is valid.

[Sublocation Code(s)]   If this Classification code is only valid at specific sublocations, enter the valid sublocation(s). Several Sublocation/Building codes can be defined, separated by commas, no spaces.

[blank]   If this Classification Code is valid in all sublocations on the system then the field should be left blank.

8. Institution/campus   [Institution Code or blank]

If you wish to specify that only certain defined institutions can have this as a valid classification code, enter the code for the Institution.

[blank]   If this Call number prefix is valid for all institutions defined in the system, leave this field blank.

Where Used

The system displays the Classification Code on the following screens:

- SERIAL COPY SET DETAIL – in the *Location* field

- Mass Holdings Update – *Classification* field

- LOCATION COPY DETAIL – *Classification* field in the *Call Number* field

Default Price (**CDPT**)

This table allows the system to supply a default value from the MARC bibliographic record for the **Actual Cost** field in pieces records.

Access   Select `Default Price Tag (CDPT)` from the `Holding Setup Menu`.

```
                     DEFAULT PRICE TAG

CODE : PRICE.TAG
    ------------------------------------------------------------------
  1. TAG number for default price              : 20
  2.     Subfield                              : c
```

The system uses the first occurrence of the specified field and subfield. The dollar sign is ignored and `.00` is supplied if the data does not contain a decimal point. For example, each of the following five values:

123    $123   123.00 $123.00   123 ($30 pbk)

from tag 20, subfield c, provide the default value 123.00, which is displayed with a dollar sign in the front on the *Actual Cost* field of the pieces record.

Where Used

The default price displays the *Actual Cost* field on the following screens:

- PIECES DETAIL – SINGLE-PART screen

- PIECES DETAIL – MULTIPART screen

Holdings Display Definition (HDD)

The Holdings Display Definition menu allows you to specify how holdings information displays to staff. From these screens you can:

- specify the format of the holdings summary screens.

- edit the column headings.

- change the content of the column by identifying a source code that links the required information to a list of available codes.

Access   You can access the Holdings Display Definition by entering HDD on any cataloguing menu or select it from the Cataloguing Holdings Menu which is available from the HOLDING SETUP MENU (CHSM).

```
 DD MMM YYYY            Geac ADVANCE Library System (#.##)        PPPPPP   IIII
    HH:MM                     Your Library Name

                        HOLDINGS DISPLAY DEFINITION

              1. Location Copy Summary
              2. Type of Holding Summary
              3. Type of Holding Summary (Location Holdings Statements)
              4. Type of Holding Linking Summary
              5. Publication Pattern Summary
              6. Publication Pattern Summary (Location Holdings Statements)
              7. Parts Summary
              8. Pieces Summary
              9. Pieces / Parts Summary
             10. Parts to Piece Linking Summary
             11. Parts to Order Linking Summary
             12. Parts Sequencing Summary
             13. Serial Copy Set Summary
             14. Serial Copy Set Summary (Checkin)

              Enter selection  :
```

Each menu item consists of these components:

- HOLDINGS DISPLAY DEFINITION. Displays a numbered list of fields which define the column headings for each screen. From this screen you can select a column heading to edit. You can also add a column heading.

- HOLDINGS DISPLAY DEFINITION SCREEN SUBFIELD BROWSE. Allows you to edit and format the appearance of one of the columns

of the Summary Display column headings. Provides access to the
SUBFIELD SOURCE field from which you can change the content of
the field.

- HOLDINGS DISPLAY DEFINITION SUBFIELD DEFINITIONS.
  Appears when the *SUBFIELD SOURCE* field is selected from the
  previous screen. Allows you to change the content of the column by
  identifying a different source code. For example, under the column
  heading Physical Location you could display the Institution Code.

Holdings Screens

The following screens are defined from the HOLDINGS DISPLAY DEFI-NITION menu:

- Location Copy Summary

    Defines the columns and fields that display on the general LOCA-TION COPY SUMMARY listing.

- Type of Holding Summary

    Defines the columns and fields that display on the general TYPE OF HOLDING SUMMARY listing.

- Type of Holding Summary (Location Holdings Statements)

    Defines the columns and fields that display on the TYPE OF HOLDING SUMMARY when holdings statements are being displayed for a specific Location copy detail.

- Type of Holding Linking Summary

    Defines the columns and fields that display on the LINK TYPE OF HOLDING TO COPY SET and the LINK TYPE OF HOLDING TO ORDER summary listings when linking type of holding records to a copy set or purchase order.

- Publication Pattern Summary

    Defines the columns and fields that display on the general PUBLICA-TION PATTERN SUMMARY listing.

- Publication Pattern Summary (Location Holdings Statements)

    Defines the columns and fields that display on the PUBLICATION PATTERN SUMMARY listing when holdings statements are being displayed for a specific Location copy detail.

- Parts Summary

    Defines the columns and fields that display on the general PARTS SUMMARY listing. This definition is also used on the LINKED PARTS listing when displaying the parts linked to the current piece.

- Pieces Summary

    Defines the columns and fields that display on the general PIECES SUMMARY and the more specific PIECES SUMMARY (Holds) list-ings.

- Pieces / Parts Summary

  Defines the columns and fields that display on the PIECES / PARTS SUMMARY listing when the *Pieces/parts* option is chosen from a specific Location copy detail. The summary screen displays both pieces and parts that are held at the specific location.

- Parts to Piece Linking Summary

  Defines the columns and fields that display on the LINK PARTS TO PIECE listing when linking new parts to a current piece.

- Parts to Order Linking Summary

  Defines the columns and fields that display on the LINK PARTS TO ORDER listing when linking new parts to a current order in Acquisitions.

- Parts Sequencing Summary

  Defines the columns and fields that display on the SEQUENCE PARTS summary listing after the user has chosen the *Sequence parts* option to resequence the order in which a type of holding's parts display.

- Serial Copy Set Summary

  Defines the columns and fields that display on the general SERIAL COPY SET SUMMARY listing.

- Serial Copy Set Summary (Checkin)

  Defines the columns and fields that display on the SERIAL COPY SET SUMMARY listing that displays within Serials Checkin.

General Definition

Select definitions 1 through 14 on the menu to edit the content and layout for the screens listed. Any of these choices displays the screen titled HOLDINGS DISPLAY DEFINITION.

```
            HOLDINGS DISPLAY DEFINITION                      MASTER

   CF record : HOLDINGS.MAINT.DISPLAY
     ***  LOCATION COPY SUMMARY  ***

FIELD BASELINE COLUMN WIDTH LINES HEADING                   DEFAULT TEXT
  1.      1       7     20    1   Physical Location
                                  ------------------
  2.      1      28     30    0   Collection/Call number/Copy
                                  ---------------------------
  3.      1      61     18    1   Format                    not defined
                                  ------
  4.      2       7     50    0   Electronic Access:

  5.      3       7     55    0   Electronic Location:




Options:
 File   # line   Add item   ? Help   Exit
```

The columns on this screen define the headings and their position on the summary displays presenting the library's holdings. In this example, the LOCATION COPY SUMMARY listing would be displayed with information on the physical location, collection, call number, copy number, physical format, electronic access, and electronic location.

This screen also defines the default text for display.

Use the *# line* or *Add item* option to access the definition of an existing column or to add a new field to the display. The HOLDINGS DISPLAY DEFINITION SCREEN SUBFIELD BROWSE screen is displayed.

```
      HOLDINGS DISPLAY DEFINITION SCREEN SUBFIELD BROWSE          MASTER

            CODE :   HOLDINGS.MAINT.DISPLAY
          FIELD :   1

1. FIELD BASELINE:    1
2. FIELD COLUMN  :    7
3. FIELD WIDTH   :   20
4. FIELD LINES   :    1
5. FIELD HEADING1: Physical Location
6. FIELD HEADING2: ------------------
7. FIELD DEFAULT :
   SUBFIELD  SOURCE                                    PREFIX    SUFFIX
     8.      INST      - Institution Code                @         @
     9.      SUBL      - Sublocation Code                @         @




Options:
 Accept   # line   Line by line   Add item   Delete   ? Help   Exit
```

Fields

These fields are common to all holdings screen definitions.

1. FIELD BASELINE   [Numeric]

Specifies the position by line number where the column displays. One represents the line immediately below the Heading. If you want a specific block of information to display on its own line, set this field to a value other than one.

2. FIELD COLUMN   [Numeric, 7-79]

Defines the starting position.

3. FIELD WIDTH   [Numeric, 1-80]

Defines the width of the column.

4. FIELD LINES   [Numeric]

Defines the maximum number of lines that will be displayed within this column. Zero indicates that there is no maximum – all of the data in the field will display regardless of the number of lines it takes.

5. FIELD HEADING1   [Text]

Defines the text that appears on the first line of the column heading for this column.

6. FIELD HEADING2   [Text]

Defines the text that appears on the second line of the column heading for this column.

7. FIELD DEFAULT   [Text]

Defines the text that appears in the column if the field(s) displayed is empty. NOTE: Any defined column which contains an Action/Status value will not use this field for the default. The Pieces Description table on the OPAC Holdings Display menus (OHD) defines the default text to display for pieces with null status.

Subfield Definitions

Provides a summary list of data elements which are to be extracted and displayed in the column.

Select a subfield by using the *# line* option or add a new entry by using the *Add item* option. The HOLDINGS DISPLAY DEFINITION SUBFIELD DEFINITIONS screen appears.

```
              HOLDINGS DISPLAY DEFINITION SUBFIELD DEFINITIONS   MASTER

          CODE  : HOLDINGS.MAINT.DISPLAY
         FIELD  : 1  - Physical Location
      SUBFIELD  : 8

 1. SOURCE     : INST       - Institution Code
 2. PREFIX     : @
 3. SUFFIX     : @



 Options:
  Accept    Line by line   # line   Delete   ? Help   Exit
```

This screen allows you to define a single data element (and related information) which displays in the defined column.

Each of the 14 summary definitions has a valid list of source codes that you can choose from. Some source codes allow you to display Institution information, others allow you to display a piece's current status. The specific source codes available for each summary definition are described in the separate sections describing each summary definition.

1. SOURCE   Enter the source code that defines what should appear in this subfield. Type ?? to see a browse list of available source codes.

2. PREFIX   Enter the text that appears at the beginning of the display element, if it is non-null. Use the symbol @ to indicate a blank space.

3. SUFFIX   Enter the text that appears at the end of the non-null display element. Use the symbol @ to indicate a blank space.

Location Copy Summary

Location copy records provide title and location information. Location data may include institution, sublocation, collection code, call number and copy number information. In prior releases, this information was entered in the pieces record.

If you have multiple copies of a single part monograph, each copy has a location copy record. For a multipart monograph with all parts at the same location, there is a single location copy record.

A location copy may also represent holdings for electronic items (856 tag).

```
                 Online Catalogue LOCATION COPY SUMMARY
Local Control #:  10003333                          Format  : BK
Title     : Integrated online library systems : principles, planning, and
Author    : Genaway, David C., 1937-
Publisher  : Knowledge Industry Publications, 1984
ISBN/ISSN  : 0867290927 :ü$34.50
Last update: 09 JAN 1998 Super User1 User1  (LC)

     Physical Location    Collection/Call number/Copy      Format
     -----------------    --------------------------      ------
 1.  ADVLIB Central       GEN-STAFF GA345.6 H798 1987      not defined
                          c.3
 2.  ADVLIB Central       GENERAL c.2                      not defined




2 item(s) in list.
Options:
 # item   Add item   Delete item(s)   Move #(s)   Go to   Limit list
 Quit holdings    ? Help   Exit
```

Access

Select *Location Copy Summary* from the HOLDINGS DISPLAY DEFINITION menu. The HOLDINGS DISPLAY DEFINITION screen appears.

```
                HOLDINGS DISPLAY DEFINITION                        MASTER

     CF record : HOLDINGS.MAINT.DISPLAY
       ***  LOCATION COPY SUMMARY  ***

  FIELD BASELINE COLUMN WIDTH LINES HEADING                    DEFAULT TEXT
    1.     1       7     20    1   Physical Location
                                   -----------------
    2.     1       28    30    0   Collection/Call number/Copy
                                   ---------------------------
    3.     1       61    18    1   Format                     not defined
                                   ------




  Options:
   File   # line   Add item   ? Help   Exit
```

Select the # line option to edit the display or select the *Add item* option to create a new field. The HOLDINGS DEFINITION SCREEN SUBFIELD BROWSE screen appears.

```
        HOLDINGS DISPLAY DEFINITION SCREEN SUBFIELD BROWSE          MASTER

          CODE :   HOLDINGS.MAINT.DISPLAY
         FIELD :   1

  1. FIELD BASELINE:    1
  2. FIELD COLUMN  :    7
  3. FIELD WIDTH   :   20
  4. FIELD LINES   :    1
  5. FIELD HEADING1:  Physical Location
  6. FIELD HEADING2:  -----------------
  7. FIELD DEFAULT :
     SUBFIELD  SOURCE                                  PREFIX    SUFFIX
       8.      INST      - Institution Code               @         @
       9.      SUBL      - Sublocation Code               @         @



  Options:
  Accept   # line   Line by line   Add item   Delete   ? Help   Exit
```

```
                HOLDINGS DISPLAY DEFINITION SUBFIELD DEFINITIONS   MASTER

        CODE  : HOLDINGS.MAINT.DISPLAY
       FIELD  : 1  - Physical Location
    SUBFIELD  : 8

1. SOURCE     : INST       - Institution Code
2. PREFIX     : @
3. SUFFIX     : @



Options:
 Accept   Line by line   # line   Delete   ? Help   Exit
```

Source Codes

NOTE: When source codes for institution, sublocation, and collection are defined for a display the system displays the *Name displayed in OPAC* field defined in the Institution Codes (CHIC), Sublocation/Building Codes (CHSC), Collection Codes (CHCC) code records respectively.

Source Code	Description of Information Displayed
CALLNO	Call Number
CNCLASS	Call Number - Classification
CNCUTTER	Call number - Cutter
CNPRE	Call number prefix
CNSCN	Call number - Shelving Control number
CNSS	Call number - Shelving scheme
CNSUF	Call number suffix
COLL	Collection Code
COPYNO	Copy number
DATE	Date last edited
EACOMP	Electronic access - Compression information Provides information about how the file was compressed and specifically how to decompress the file. This information is retrieved from the USMARC field 856, subfield c.

EACONTACT	Electronic access - Contact for assistance Provides the contact name for access assistance. This information is stored in the USMARC field 856, subfield m.
EAENAME	Electronic access - Electronic file name Specifies the name of the electronic file as it appears in the directory indicated in the directory path. This information is stored in the USMARC field 856, subfield f.
EAFSIZE	Electronic access - File size Specifies the size of the file as stored under the filename specified in EAENAME. This information is stored in the USMARC field 856, subfield s.
EAHOST	Electronic access - Host name Specifies the fully qualified domain (host name) of the electronic location. This information is stored in the USMARC field 856, subfield a.
EAHOSTLOC	Electronic access - Full name of location Specifies the full name of the host location, including the geographical location as indicated in EAHOST. This information is stored in the USMARC field 856, subfield n.
EAIP	Electronic access - IP address Specifies the Internet Protocol (IP) address, i.e., the numeric address associated with the host. This information is stored in the USMARC field 856, subfield b.
EAMATERIAL	Electronic access - Materials specified Specifies the part of the bibliographic item to which this electronic location information applies. This information is stored in the USMARC field 856, subfield 3.
EAMETHOD	Electronic access method Specifies the access methods that can be used, such as Email, FTP, Remote login. This information is stored in the USMARC field 856, subfield 2.
EANPUBNOTE	Electronic access - Nonpublic notes Contains the nonpublic note pertaining to the electronic location or item. This information is stored in the USMARC field 856, subfield x.
EAOS	Electronic access - Operating system Specifies the operating system for the host named in EAHOST. This information is stored in the USMARC field 856, subfield o.
EAPATH	Electronic access - Directory path Specifies the path with the directory names where the file is stored. This information is stored in the USMARC field 856, subfield d.

EAPUBNOTE	Electronic access - Public notes Contains the public note pertaining to the electronic location or item. This information is stored in the USMARC field 856, subfield z.
EAURL	Electronic access - Uniform Resource Locator Contains the Uniform Resource Locator, which provides the standard syntax for locating an object using the existing Internet protocols. Field 856 subfield u.
FORMAT	The two letter code that defines the physical format for example, cf, cj, and so forth. Physical format is defined in the USMARC 007 field, positions 1 and 2.
FORMAT.LNG	Physical format – long description. Text description of the physical format code, for example, tape cassette (cf), magnetic disk (cj).
INST	Institution Code
LOCCPYKEY	Location Copy record key
SUBL	Sublocation Code
TIME	Time last edited
USER	User who edited the record

Where Used

The Location Copy Summary screen can be accessed:

- when the *Holdings edit* option is selected the *Locations display* option appears.

Type of Holding Summary

The Type of Holding Summary record defines the type of holdings that make up a multipart or serial title. Each record contains a list of all the possible parts that comprise this type of holding and defines the logical sequence in which the parts should display.

Example Type of Holding Summary Display

```
               TYPE OF HOLDING SUMMARY                        MASTER

 LCN      :10008609   Call #: UNC                    ISSN: 0009-5982
 Title    :The Chronicle of higher education
 Imprint  :[Washington, etc., Chronicle of higher e+    LCCN: sf 80001055

     Description                     Type  Supplement/Index type
     -----------                     ----  --------------------
 1.  Paper                           ISS
     Captions/Labels: Vol.:No.:(Month):(Day):(Year)
 2.  CD-ROM                          ISS
     Captions/Labels: Vol.:No.:(Month):(Day):(Year)
 3.  General Index                   IND
     Captions/Labels: (year)
 4.  Loose-Leaf                      ISS
     Captions/Labels: v.:n.



 4 item(s) in list
 Options:
  # item   Add item   Delete item(s)   Sequence TOHs   Move #(s)   Go to
  Limit list   Quit holdings   ? Help   Exit
```

Access

Select *Type of Holding Summary* from the *HOLDINGS DISPLAY DEFINITION* menu. The HOLDINGS DISPLAY DEFINITION screen appears.

```
            HOLDINGS DISPLAY DEFINITION                    MASTER

   CF record : HOLDINGS.MAINT.DISPLAY
     ***  TYPE OF HOLDING SUMMARY  ***

FIELD BASELINE COLUMN WIDTH LINES HEADING                DEFAULT TEXT
  1.    1        7    30    1  Description
                                ------------
  2.    1       39     4    1  Type
                                ----
  3.    1       45    21    1  Supplement/Index type
                                ---------------------
  4.    2        7    60    0  Captions/Labels:



Options:
 File   # line   Add item   ? Help   Exit
```

Select the # line option to edit the display or select the *Add item* option to create a new field. The HOLDINGS DISPLAY DEFINITION SCREEN SUBFIELD BROWSE screen appears.

```
       HOLDINGS DISPLAY DEFINITION SCREEN SUBFIELD BROWSE        MASTER

          CODE :   HOLDINGS.MAINT.DISPLAY
         FIELD :   4

1. FIELD BASELINE:    2
2. FIELD COLUMN  :    7
3. FIELD WIDTH   :   60
4. FIELD LINES   :    0
5. FIELD HEADING1:  Captions/Labels:
6. FIELD HEADING2:
7. FIELD DEFAULT :
   SUBFIELD  SOURCE                                 PREFIX    SUFFIX
     8.      ENUMCHRON - Enumeration and Chronology levels



Options:
 Accept   # line   Line by line   Add item   Delete   ? Help   Exit
```

Subfield Definitions

```
               HOLDINGS DISPLAY DEFINITION SUBFIELD DEFINITIONS   MASTER

          CODE  : HOLDINGS.MAINT.DISPLAY
         FIELD  : 4  - Captions/Labels:
      SUBFIELD  : 8

1. SOURCE    : ENUMCHRON  - Enumeration and Chronology levels
2. PREFIX    :
3. SUFFIX    :




Options:
 Accept   Line by line   # line   Delete   ? Help   Exit
```

Source Codes

Source Code	Description of Information Displayed
DATE	Date last edited
DESC	Description of this type of holding
ENUMCHRON	Displays the Enumeration and Chronology captions/labels associated with the most recently added publication pattern for this Type of Holding.
SUPIND	Type of supplement or index
TIME	Time last edited
TOHKEY	Type of Holding record key
TYPE	Publication Pattern Type, i.e., issue, index supplement.
USER	User who last edited the record

Where Used

The Type of Holding Summary screen can be accessed:

• when the *Holdings edit* option is selected the *Type of holdings display* option appears.

- from the LOCATION COPY DETAIL screen from the *Holdings Statement* option.

- from the PARTS DETAIL screen from the *Type of Holding* field.

- from the SERIAL COPY SET DETAIL screen by using the *Type of Holdings* option.

Type of Holding Summary (Location Holdings Statement)

Similar to the Type of Holding Summary display but shows the holdings for a specific location only.

This record defines what type of holdings make up a multipart monograph or serial. Each record contains a list of all the possible parts that comprise this type of holding and defines the logical sequence in which the parts should display.

Example Location Holdings Summary Statement

```
             TYPE OF HOLDING SUMMARY                       MASTER

 LCN     :10008609   Call #: UNC                    ISSN: 0009-5982
 Title   :The Chronicle of higher education
 Imprint :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055

     Description                    Holdings statement
     -----------                    ------------------
  1.  Paper                         Vol.43:No.49(AUG:22:1997)-Vol.44:No.4(SE
                                    P:26:1997),Vol.44:No.6(OCT:10:1997),
                                    Vol.44:No.8(OCT:24:1997)-Vol.44:No.19(JA
                                    N:23:1998),Vol.44:No.21(FEB:06:1998)




 1 item(s) in list
 Options:
  # item   Accept   Limit list   Quit holdings   ? Help   Exit
```

Access

Select *Type of Holding Summary (Location Holdings Statement)* from the *HOLDINGS DISPLAY DEFINITION* menu. The HOLDINGS DISPLAY DEFINITION screen appears.

```
                HOLDINGS DISPLAY DEFINITION                      MASTER

   CF record : HOLDINGS.MAINT.DISPLAY
     ***  TYPE OF HOLDING SUMMARY (LOCATION HOLDINGS STATEMENTS)  ***

FIELD BASELINE COLUMN WIDTH LINES HEADING                   DEFAULT TEXT
  1.     1       7     28    1   Description
                                  ------------
  2.     1      38     40    0   Holdings statement
                                  ------------------




Options:
 File   # line   Add item   ? Help   Exit
```

Select the # line option to edit the display or select the *Add item* option to create a new field. The HOLDINGS DISPLAY DEFINITION SCREEN SUBFIELD BROWSE screen appears.

```
       HOLDINGS DISPLAY DEFINITION SCREEN SUBFIELD BROWSE            MASTER

          CODE :   HOLDINGS.MAINT.DISPLAY
         FIELD :    2

1. FIELD BASELINE:     1
2. FIELD COLUMN  :    38
3. FIELD WIDTH   :    40
4. FIELD LINES   :     0
5. FIELD HEADING1:  Holdings statement
6. FIELD HEADING2:  ------------------
7. FIELD DEFAULT :
   SUBFIELD  SOURCE                                    PREFIX    SUFFIX
     8.      HSTMT - Summary holdings statement



Options:
 Accept   # line   Line by line   Add item   Delete   ? Help   Exit
```

Subfield Definitions

```
                HOLDINGS DISPLAY DEFINITION SUBFIELD DEFINITIONS   MASTER

          CODE  : HOLDINGS.MAINT.DISPLAY
         FIELD  : 2  - Holdings statement
      SUBFIELD  : 8

1. SOURCE    : HSTMT      - Summary holdings statement
2. PREFIX    :
3. SUFFIX    :




Options:
 Accept   Line by line   # line   Delete   ? Help   Exit
```

Source Codes

Source Code	Description of Information Displayed
DATE	Date last edited
DESC	Description of this type of holding
ENUMCHRON	Displays the Enumeration and Chronology levels captions/labels associated with the most recently added publication pattern for this Type of Holding.
HSTMT	Displays the Summary holdings statement associated with this type of holding.
SUPIND	Type of supplement or index
TIME	Time last edited
TOHKEY	Type of Holding record key
TYPE	Publication Pattern Type, i.e., issue, index, supplement.
USER	User who last edited the record

Where Used

The Type of Holding Summary (Location Holdings Statement) screen can be accessed from:

- the LOCATION COPY DETAIL screen from the *Holdings Statement* option.

Type of Holding Linking Summary

Displays the types of holdings that are linked to a copy set.

Example Holding Linking Summary

```
              LINK TYPE OF HOLDING TO COPY SET              MASTER

 LCN    :10008609  Call #: UNC                  ISSN: 0009-5982
 Title  :The Chronicle of higher education
 Imprint:[Washington, etc., Chronicle of higher e+    LCCN: sf 80001055

      Description                   Type  Supplement/Index type     Link
      -----------                   ----  --------------------      ----
  1.  Paper                         ISS                              Y
      Captions/Labels: Vol.:No.:(Month):(Day):(Year)
  2.  SUP          SUP   pp         ANNUAL                           N
       Captions/Labels:y.




 2 item(s) in list
 Options:
  Retrieve item(s)  # item  Add item  Mark item(s)  Limit list
  Quit holdings   ? Help   Exit
```

Access

Select *Holding Linking Summary* from the *HOLDINGS DISPLAY
DEFINITION* menu. The HOLDINGS DISPLAY DEFINITION screen appears.

```
            HOLDINGS DISPLAY DEFINITION                         MASTER

   CF record : HOLDINGS.MAINT.DISPLAY
     ***  TYPE OF HOLDINGS LINKING SUMMARY  ***

FIELD BASELINE COLUMN WIDTH LINES HEADING                  DEFAULT TEXT
  1.     1       7     30     1  Description
                                 -----------
  2.     1      39      4     1  Type
                                 ----
  3.     1      45     21     1  Supplement/Index type
                                 ---------------------
  4.     1      73      4     1  Link
                                 ----



Options:
 File   # line   Add item   ? Help   Exit
```

Select the # line option to edit the display or select the *Add item* option to create a new field. The HOLDINGS DISPLAY DEFINITION SCREEN SUBFIELD BROWSE screen appears.

```
        HOLDINGS DISPLAY DEFINITION SCREEN SUBFIELD BROWSE            MASTER

         CODE :   HOLDINGS.MAINT.DISPLAY
        FIELD :   4

1. FIELD BASELINE:    1
2. FIELD COLUMN  :   73
3. FIELD WIDTH   :    4
4. FIELD LINES   :    1
5. FIELD HEADING1:  Link
6. FIELD HEADING2:  ----
7. FIELD DEFAULT :
   SUBFIELD  SOURCE                                  PREFIX    SUFFIX
     8.     LINK - Type of Holding Linking Flag



Options:
 Accept   # line   Line by line   Add item   Delete   ? Help   Exit
```

Subfield Definitions

```
              HOLDINGS DISPLAY DEFINITION SUBFIELD DEFINITIONS   MASTER

         CODE  : HOLDINGS.MAINT.DISPLAY
        FIELD  : 4  - Link
     SUBFIELD  : 8

1. SOURCE    : LINK       - Type of Holding Linking Flag
2. PREFIX    :
3. SUFFIX    :




Options:
 Accept   Line by line   # line   Delete   ? Help   Exit
```

Source Code	Description of Information Displayed
DATE	Date last edited
DESC	Description of this type of holding
ENUMCHRON	Displays the Enumeration and Chronology levels captions/labels associated with the most recently added publication pattern for this Type of Holding.
LINK	Displays the Linking Flag which indicates whether the Type of Holding record is linked to a copy set or an order. A Y (yes) or N (no) is used to specify the status.
SUPIND	Type of supplement or index
TIME	Time last edited
TOHKEY	Type of Holding record key
TYPE	Publication Pattern Type, i.e. issue, index, supplement
USER	User who last edited the record

Where Used

The Type of Holding Linking Summary screen can be accessed from the SERIAL COPY SET DETAIL screen:

- when the *Type of Holding* option is used. The LINKED TYPE OF HOLDING screen appears. Select the *Link* option.

Publication Pattern Summary

Displays the types of publication patterns that have been defined for the specified material.

Example Publication Pattern Summary

```
               PUBLICATION PATTERN SUMMARY                  MASTER

LCN     :10008609  Call #: UNC                      ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055

     Enumeration/Chronology   Frequency     Description
     ----------------------   ---------     -----------
 1.  Vol.:No.:(Month):(Day):  Weekly        Paper
     (Year)
     Notes: published weekly except for last week in August and last two
     weeks in December




1 item(s) in list
Options:
 # item   Add item   Delete item(s)   Go to   Limit list   Quit holdings
 ? Help   Exit
```

Access

Select *Publication Pattern Summary* from the *HOLDINGS DISPLAY DEFINITION* menu. The HOLDINGS DISPLAY DEFINITION screen appears.

```
                HOLDINGS DISPLAY DEFINITION                     MASTER

   CF record : HOLDINGS.MAINT.DISPLAY
     ***  PUBLICATION PATTERN SUMMARY  ***

FIELD BASELINE COLUMN WIDTH LINES HEADING                    DEFAULT TEXT
  1.     1        7     23     0  Enumeration/Chronology
                                  ---------------------
  2.     1       32     12     0  Frequency
                                  ---------
  3.     1       46     30     0  Description
                                  -----------




Options:
 File   # line   Add item   ? Help   Exit
```

Select the # line option to edit the display or select the *Add item* option
to create a new field. The HOLDINGS DISPLAY DEFINITON SCREEN
SUBFIELD BROWSE screen appears.

```
      HOLDINGS DISPLAY DEFINITION SCREEN SUBFIELD BROWSE            MASTER

         CODE :   HOLDINGS.MAINT.DISPLAY
        FIELD :    2

1. FIELD BASELINE:    1
2. FIELD COLUMN  :   32
3. FIELD WIDTH   :   12
4. FIELD LINES   :    0
5. FIELD HEADING1: Frequency
6. FIELD HEADING2: ---------
7. FIELD DEFAULT :
   SUBFIELD  SOURCE                                    PREFIX    SUFFIX
      8.     FREQ - Publication frequency



Options:
 Accept   # line   Line by line   Add item   Delete   ? Help   Exit
```

```
              HOLDINGS DISPLAY DEFINITION SUBFIELD DEFINITIONS   MASTER

          CODE  : HOLDINGS.MAINT.DISPLAY
         FIELD  : 2  - Frequency
      SUBFIELD  : 8

1. SOURCE    : FREQ      - Publication frequency
2. PREFIX    :
3. SUFFIX    :




Options:
 Accept   Line by line   # line   Delete   ? Help   Exit
```

Source Code	Description of Information Displayed
ALTCHRON	Alternate Chronology levels and their captions/labels.
ALTENUM	Alternate Enumeration levels and their captions/labels.
CHRON	Chronology levels and their labels /captions
DATE	Date last edited
DATESPAN	Date Span – range of dates or volumes that the publication pattern is valid for.
DELAY	Default Claim delay. Displays the number of days between the expected receipt date of a copy of an issue and when the system should generate a claim letter.
DESC	Description of the type of holding that this publication pattern belongs to.
ENUM	Enumeration levels and captions/label.
ENUMCHRON	Enumeration and Chronology levels and captions/labels are displayed together.
FREQ	Publication frequency, i.e., annual, monthly, weekly.
FREQNOTE	Publication frequency notes
PUBPATKEY	Publication Pattern record key

STAT	Status of record which indicates whether the record is active or inactive.
SUPIND	Type of supplement or index
TIME	Time last edited
TYPE	Publication Pattern Type, i.e., issue, index, supplement
USER	User who last edited the record

Where Used

The Publication Pattern Summary screen can be accessed:

- when the *Holdings edit* option is selected the *Type of holdings display* option appears.

- from the TYPE OF HOLDING DETAIL screen when the *Patterns* option is selected.

- on the PARTS DETAIL screen from the *Type of Holding* field.

Publication Pattern Summary (Location Holdings Statements)

Displays the publication patterns for a specific bibliographic item at a specific location.

Example Publication Pattern Summary

```
                PUBLICATION PATTERN SUMMARY                 MASTER

LCN     :10008609   Call #: UNC                    ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055

     Enumeration/Chronology   Frequency      Description
     ----------------------   ---------      -----------
 1.  Vol.:No.:(Month):(Day):  Weekly         Paper
     (Year)
     PUBPAT statement: Vol.43:No.49(AUG:22:1997)-Vol.44:No.4(SEP:26:1997),
     Vol.44:No.6(OCT:10:1997),
     Vol.44:No.8(OCT:24:1997)-Vol.44:No.19(JAN:23:1998),
     Vol.44:No.21(FEB:06:1998)




1 item(s) in list
Options:
 Retrieve #   Accept   Limit list   Quit holdings   ? Help   Exit
```

Access

Select *Publication Pattern Summary* from the *HOLDINGS DISPLAY DEFINITION* menu. The HOLDINGS DISPLAY DEFINITION screen appears.

```
                 HOLDINGS DISPLAY DEFINITION                        IIIIII

   CF record : HOLDINGS.MAINT.DISPLAY
     ***  PUBLICATION PATTERN SUMMARY  (LOCATION HOLDINGS STATEMENTS) ***

FIELD BASELINE COLUMN WIDTH LINES HEADING                     DEFAULT TEXT
  1.     1       7     23    0  ENUMERATION/CHRONOLOGY
                                ----------------------
  2.     1      32     22    0  FREQUENCY
                                ----------------------
  3.     1      56      6    1  FORMAT
                                ------
  4.     1      64     15    0  DESCRIPTION
                                ---------------
  5.     2       7     72    0  Pubpat statement :




Options:
 File   # line   Add item   ? help   Exit
```

Select the # line option to edit the display or select the *Add item* option
to create a new field. The HOLDINGS DISPLAY DEFINITION SCREEN
SUBFIELD BROWSE screen appears.

```
      HOLDINGS DISPLAY DEFINITION SCREEN SUBFIELD BROWSE            MASTER

          CODE :   HOLDINGS.MAINT.DISPLAY
         FIELD :    4

1. FIELD BASELINE:    2
2. FIELD COLUMN  :    7
3. FIELD WIDTH   :   71
4. FIELD LINES   :    0
5. FIELD HEADING1:  PUBPAT statement:
6. FIELD HEADING2:
7. FIELD DEFAULT :
   SUBFIELD  SOURCE                                    PREFIX    SUFFIX
     8.     HSTMT - Holdings Statement



Options:
 Accept   # line   Line by line   Add item   Delete   ? Help   Exit
```

Subfield Definitions

```
              HOLDINGS DISPLAY DEFINITION SUBFIELD DEFINITIONS   MASTER

         CODE  : HOLDINGS.MAINT.DISPLAY
        FIELD  : 4  - PUBPAT statement:
     SUBFIELD  : 8

1. SOURCE    : HSTMT      - Holdings Statement
2. PREFIX    :
3. SUFFIX    :




Options:
 Accept   Line by line   # line   Delete   ? Help   Exit
```

Source Codes

Source Code	Description of Information Displayed
ALTCHRON	Alternate Chronology levels and their captions/labels
ALTENUM	Alternate Enumeration levels and their captions/labels
CHRON	Chronology and their labels/captions.
DATE	Date last edited
DATESPAN	Range of dates or volumes that the publication pattern is valid for.
DELAY	Default Claim delay. Displays the number of days between the expected receipt date of a copy of an issue and when the system should generate a claim letter.
DESC	Description of the type of holding that this publication pattern belongs to.
ENUM	Enumeration levels captions/labels are displayed together.
ENUMCHRON	Enumeration and Chronology levels and captions/labels
FREQ	Publication frequency, i.e., annual, monthly, weekly
FREQNOTE	Publication frequency notes

HSTMT	Displays the Holdings statement associated with this type of Publication Pattern.
PUBPATKEY	Publication Pattern record key
STAT	Status of record which indicate whether the record is active or inactive
SUPIND	Type of supplement or index
TIME	Time last edited
TYPE	Publication Pattern Type, i.e., issue, index, supplement
USER	User who last edited the record

Where Used

The Publication Pattern Summary (Location Holdings Statement) screen can be accessed:

- when the *Volume/Part#* field is used to obtain the LINKED PARTS screen. Select the *# item* option to display the PARTS DETAIL screen. Enter ?? in the *Publication Pattern* field. The PUBLICATION PATTERN SUMMARY screen appears. This screen displays the holdings for the location identified on the Pieces record.

Parts Summary

Lists the parts for this title.

Example Parts Summary

```
            PARTS SUMMARY                            MASTER

LCN    :10008609  Call #: UNC                 ISSN: 0009-5982
Title  :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+    LCCN: sf 80001055

      Part Number          Type of Holding
      -----------          --------------
 1.  Vol.44:No.22(FEB:13:  Paper - ISS
     1998)
 2.  Vol.44:No.21(FEB:06:  Paper - ISS
     1998)
 3.  Vol.44:No.20(JAN:30:  Paper - ISS
     1998)
 4.  Vol.44:No.19(JAN:23:  Paper - ISS
     1998)
 5.  Vol.44:No.18(JAN:16:  Paper - ISS
     1998)

23 item(s) in list
Options:
 # item   Insert at line #   Delete item(s)   Go to   Forward   Limit list
 Quit holdings   ? Help   Exit
```

Access

Select *Parts Summary* from the HOLDINGS DISPLAY DEFINITION menu. The HOLDINGS DISPLAY DEFINITION screen appears.

```
                  HOLDINGS DISPLAY DEFINITION                      MASTER

    CF record : HOLDINGS.MAINT.DISPLAY
       ***   PARTS SUMMARY  ***

FIELD BASELINE COLUMN WIDTH LINES HEADING                    DEFAULT TEXT
  1.     1       7     20     0  Part Number
                                 -----------
  2.     1      29     30     1  Type of Holding
                                 ---------------




Options:
 File   # line   Add item   ? Help   Exit
```

Select the # line option to edit the display or select the *Add item* option
to create a new field. The HOLDINGS DISPLAY DEFINITION SCREEN
SUBFIELD BROWSE screen appears.

```
      HOLDINGS DISPLAY DEFINITION SCREEN SUBFIELD BROWSE          MASTER

         CODE :   HOLDINGS.MAINT.DISPLAY
        FIELD :   2

1. FIELD BASELINE:     1
2. FIELD COLUMN  :    29
3. FIELD WIDTH   :    30
4. FIELD LINES   :     1
5. FIELD HEADING1:  Type of Holding
6. FIELD HEADING2:  ---------------
7. FIELD DEFAULT :
   SUBFIELD  SOURCE                                    PREFIX    SUFFIX
     8.      DESC      - Description of this type of hol+
     9.      TYPE      - Publication Pattern Type           -




Options:
 Accept   # line   Line by line   Add item   Delete   ? Help   Exit
```

Subfield Definitions

```
               HOLDINGS DISPLAY DEFINITION SUBFIELD DEFINITIONS   MASTER

          CODE  : HOLDINGS.MAINT.DISPLAY
         FIELD  : 2  - Type of Holding
      SUBFIELD  : 9

1. SOURCE     : TYPE       - Publication Pattern Type
2. PREFIX     : -
3. SUFFIX     :


Options:
 Accept   Line by line   # line   Delete   ? Help   Exit
```

Source Codes

Source Code	Description of Information Displayed
DATE	Date last edited
DESC	Description of this type of holding
FEE	Copyright article fee code
PARTNO	Part Number, i.e., v.12:iss.1(1998:JAN)
PARTSKEY	Parts record key
TIME	Time last edited
TITLE	Part title
TYPE	Publication Pattern Type, i.e., issue, index, supplement
USER	User who last edited the record

Where Used

The Parts Summary screen can be accessed:

- when the *Holdings edit* option is selected the *Parts display* option appears.

- from the TYPE OF HOLDING DETAIL screen when the *Parts* option is selected.

Pieces Summary

Lists all the pieces for this title.

Example Pieces Summary

```
              PIECES SUMMARY                                    MASTER

 LCN      :10003333  Call #: Z678.9.G45 1984              ISSN:
 Title    :Integrated online library systems : principles, planning, and impl+
 Imprint  :White Plains, NY : Knowledge Industry Pu+       LCCN: 84015406 //r9

       Pieces key       Location Information  Current Status    Numbering    Notes
       ----------       -------------------- --------------    ---------    -----
  1.  00017762859       ADVLIB Central        In Processing                   N
                        GEN-STAFF GA345.6
                        H798 1987 c.3
  2.  00035778843       ADVLIB Central        DUE: 02/26/98                   N
                        GENERAL c.2
      Staff notes: Send for deacidification Lot 651 / Rebind after
      deacidification / deacidify / 19970502 / DLC / bind / 19970804 / DLC




 2 item(s) in list.
 Options:
  # item   Add item   Delete item(s)   Move #(s)   Multipart/serial   Go to
  Limit list   Quit holdings   ? Help   Exit
```

Access

Select *Pieces Summary* from the `HOLDINGS DISPLAY DEFINITION`
menu. The HOLDINGS DISPLAY DEFINITION screen appears.

```
                  HOLDINGS DISPLAY DEFINITION                    MASTER

      CF record : HOLDINGS.MAINT.DISPLAY
        ***   PIECES SUMMARY   ***

   FIELD BASELINE COLUMN WIDTH LINES HEADING                    DEFAULT TEXT
     1.      1       7     14    1  Pieces key                  none
                                    ----------
     2.      1      23     20    0  Location Information
                                    --------------------
     3.      1      45     15    0  Current Status
                                    --------------
     4.      1      62     10    0  Numbering
                                    ---------
     5.      1      74      5    0  Notes
                                    -----




   Options:
    File   # line   Add item   ? Help   Exit
```

Select the # line option to edit the display or select the *Add item* option to create a new field. The HOLDINGS DISPLAY DEFINITION SCREEN SUBFILED BROWSE screen appears.

```
          HOLDINGS DISPLAY DEFINITION SCREEN SUBFIELD BROWSE          IIIIII

            CODE :   HOLDINGS.MAINT.DISPLAY
           FIELD :   1

1. FIELD BASELINE:     1
2. FIELD COLUMN  :     7
3. FIELD WIDTH   :    14
4. FIELD LINES   :     1
5. FIELD HEADING1:  Pieces key
6. FIELD HEADING2:  -------------
7. FIELD DEFAULT :  none
   SUBFIELD  SOURCE                                         PREFIX    SUFFIX
     8.       PIECESKEY - Pieces record key




Options:
 Accept   # line   Line by line   Add item   Delete   ? help   Exit
```

Subfield Definitions

```
              HOLDINGS MAINTENANCE SUBFIELD DEFINITIONS          IIIIII

         CODE  : HOLDINGS.MAINT.DISPLAY
        FIELD  : 1  - Pieces key
     SUBFIELD  : 8

1. SOURCE     : PIECESKEY  - Pieces record key
2. PREFIX     :
3. SUFFIX     :



Options:
 Accept   Line by line   # line   Delete   ? help   Exit
```

Source Codes

Source Code	Description of Information Displayed
ACCESSION	Accession Number
ACTION	Pending action
BOUND	Bound label
CALLNO	Call number
CALLNO.O	Call number of the owning location
CCNT	Circulation count (this year)
CCNTIN	Circulation count — in-house (this year)
CCNINTOT	Circulation count — in-house (total)
CCNTTOT	Circulation count — total
CCODE	Circulation Code
CCODE.O	Circulation Code of the owning location
CKOUTDATE	Last checkout date
CLASS	Classification scheme
CNCLASS	Call number - Classification
CNCLASS.O	Call number - Classification of the owning location
CNCUTTER	Call number - Cutter
CNCUTTER.O	Call number - Cutter of the owning location
CNPRE	Call number prefix
CNPRE.O	Call number prefix of the owning location
CNSCN	Call number - Shelving Control Number
CNSCN.O	Call number - Shelving Control Number of the owning location.
CNSUF	Call number suffix
CNSUF.O	Call number suffix of the owning location

COLL	Collection Code
COLL.O	Collection Code of the owning location
COPYNO	Copy number
COST	Actual or current cost
DATE	Late update date and time
DATEREC	Date received
DUEDATE	Due date
DUETIME	Due time
INST	Institution Code
INST.O	Institution Code of the owning location
INVDATE	Last inventory date
LOCCPYKEY	Location Copy record key
NONPUBNOTE	Nonpublic notes
NOTEFLG	Public notes flag. Displays a Y if there are public notes attached to this piece
PATRON	Patron who checked out the item
PIECESKEY	Pieces record key
PONO	Current PO number
PUBNOTE	Public notes
STAT	Current status
SUBL	Sublocation Code
SUBL.O	Sublocation Code of the owning location
TITLE	Title of the piece

Where Used

The Pieces Summary screen can be accessed:

• when the *Holdings edit* option is selected the *Pieces display* option appears.

Pieces/Parts Summary

Displays pieces and parts for a specific location.

Example Pieces/Parts Summary

```
               Online Catalogue PIECES / PARTS SUMMARY

 LCN    :10008609   Call #: UNC                       ISSN: 0009-5982
 Title  :The Chronicle of higher education
 Imprint :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055


        Part number/Bound label        Status              Barcoded
        ----------------------         ------              --------
  1.  Vol.44:No.22(FEB:13:1998)        Exp issue           N
  2.  Vol.44:No.21(FEB:06:1998)        Received            N
  3.  Vol.44:No.20(JAN:30:1998)        Item due            N
  4.  Vol.44:No.19(JAN:23:1998)        Received            N
  5.  Vol.44:No.18(JAN:16:1998)        Received            N
  6.  Vol.44:No.17(JAN:09:1998)        Received            N
  7.  Vol.44:No.16(JAN:02:1998)        Received            N
  8.  Vol.44:No.15(DEC:12:1997)        Received            N
  9.  Vol.44:No.14(DEC:05:1997)        Received            N
 10.  Vol.44:No.13(NOV:28:1997)        Received            N


 23 item(s) in list
 Options:
  # item   Delete item(s)   Move #(s)   Forward   Limit list   Quit holdings
  ? Help    Exit
```

Access

Select *Pieces/Parts Summary* from the HOLDINGS DISPLAY DEFINITION menu. The HOLDINGS DISPLAY DEFINITION screen appears.

```
                    HOLDINGS DISPLAY DEFINITION                    IIIIII

   CF record : HOLDINGS.MAINT.DISPLAY
     ***  PIECES / PARTS SUMMARY  ***

FIELD BASELINE COLUMN WIDTH LINES HEADING                    DEFAULT TEXT
  1.     1        7     25     2  PART NUMBER/BOUND LABEL     No bound lab
                                  ------------------------
  2.     1       37     20     1  Status
                                  --------------------
  3.     1       60      8     1  Barcoded
                                  --------



Options:
 File   # line   Add item   ? help   Exit
```

Select the # line option to edit the display or select the *Add item* option
to create a new field. The HOLDINGS DISPLAY DEFINITION SCREEN
SUBFIELD BROWSE screen appears.

```
        HOLDINGS DISPLAY DEFINITION SUBFIELD BROWSE                IIIIII

          CODE :   HOLDINGS.MAINT.DISPLAY
         FIELD :   1

1. FIELD BASELINE:    1
2. FIELD COLUMN  :    7
3. FIELD WIDTH   :   25
4. FIELD LINES   :    2
5. FIELD HEADING1:  PART NUMBER/BOUND LABEL
6. FIELD HEADING2:  ------------------------
7. FIELD DEFAULT :  No bound label
   SUBFIELD  SOURCE                                   PREFIX    SUFFIX
     8.      PNOBLAB - Part Number/Bound Label



Options:
 Accept   # line   Line by line   Add item   Delete   ? help   Exit
```

Subfield Definitions

```
              HOLDINGS DISPLAY DEFINITION SUBFIELD DEFINITIONS      IIIIII

         CODE  : HOLDINGS.MAINT.DISPLAY
        FIELD  : 1  - PART NUMBER/BOUND LABEL
     SUBFIELD  : 8

1. SOURCE     : PNOBLAB    - Part Number/Bound Label
2. PREFIX     :
3. SUFFIX     :


Options:
 Accept   Line by line   # line   Delete   ? help   Exit
```

Source Codes

Source Code	Description of Information Displayed
BOUNDFLG	Pieces Bound Flag. Displays Y or N to indicate whether the item (piece/part)is bound (barcoded).
CLAIM	Claim status. Indicates whether the claim for the part has an active or inactive status.
CONDITION	Physical condition of part/piece
DATE	Date last edited
DESC	Description of the type of holding associated with this part.
ENTRYDT	Entry date and time
LOCCPYKEY	Location Copy record key
NONPUBNOTE	Nonpublic notes
PARTSKEY	Parts record key
PIECESKEY	Pieces key that this part is linked to

PNOBLAB	Part Number/Bound Label, i.e., vol.12:iss.1(1998:JAN) or vol.12. Displays the enumeration and chronology of the single part or of the parts linked to the piece being displayed. If the piece has a bound label defined, the bound label displays.
PONO	Purchase Order number
PUBNOTE	Public notes
SCLMKEY	Key to serial claim record
SCPYKEY	Copy set key for this part
STAT	Status. Displays the current status of the part or piece, such as checked out, in library, in bindery, missing, and so forth.
TIME	Time last edited
TITLE	Part title
TOHKEY	Type of Holding record key
TYPE	Publication Pattern Type (issue, index, supplement)
USER	User who last edited this record

Where Used

The Pieces/Parts Summary screen can be accessed:

- from the LOCATION COPY DETAIL screen when the *Pieces/Parts* option is selected.

Parts to Piece Linking Summary

Displays a list of parts linked to a specific barcode.

Example Parts Linking Summary

```
              LINK PARTS TO PIECE                          MASTER

LCN     :10008609  Call #: UNC                    ISSN: 0009-5982
Title   :The Chronicle of higher education
Imprint :[Washington, etc., Chronicle of higher e+     LCCN: sf 80001055

     Part number      Type              Status      Barcoded  Link?
     -----------      ----              ------      --------  -----
 1.  Vol.45:No.9(SEP  Paper             Exp issue   N         N
     :16:1998)
 2.  Vol.45:No.8(SEP  Paper             Item due    N         N
     :02:1998)
 3.  Vol.45:No.7(AUG  Paper             Received    N         N
     :19:1998)
 4.  Vol.45:No.6(AUG  Paper             Received    N         N
     :05:1998)
 5.  Vol.45:No.5(DEC  Paper             Received    Y         Y
     :22:1998)

126 item(s) in list
Options:
 Retrieve item(s)  # item  Insert at line #  Mark item(s)  Forward
 Limit list  Quit holdings  ? Help  Exit
```

Access

Select *Pieces/Parts Summary* from the `HOLDINGS DISPLAY DEFINITION` menu. The HOLDINGS DISPLAY DEFINITION screen appears.

```
                    HOLDINGS DISPLAY DEFINITION                     MASTER

      CF record : HOLDINGS.MAINT.DISPLAY
        ***  PARTS TO PIECE LINKING SUMMARY  ***

FIELD BASELINE COLUMN WIDTH LINES HEADING                    DEFAULT TEXT
  1.     1       7     15    0  Part number                  nothing to s
                                 -----------
  2.     1      25     18    1  Type
                                 ----
  3.     1      46     13    1  Status
                                 ------
  4.     1      62      8    1  Barcoded
                                 --------
  5.     1      72      5    1  Link?
                                 -----




Options:
 File   # line   Add item   ? Help   Exit
```

Select the # line option to edit the display or select the *Add item* option
to create a new field. The HOLDINGS DISPLAY DEFINITION SCREEN
SUBFIELD BROWSE screen appears.

```
        HOLDINGS DISPLAY DEFINITION SCREEN SUBFIELD BROWSE         MASTER

          CODE :   HOLDINGS.MAINT.DISPLAY
         FIELD :   1

1. FIELD BASELINE:    1
2. FIELD COLUMN  :    7
3. FIELD WIDTH   :   15
4. FIELD LINES   :    0
5. FIELD HEADING1:  Part number
6. FIELD HEADING2:  -----------
7. FIELD DEFAULT :  nothing to see
   SUBFIELD  SOURCE                                 PREFIX    SUFFIX
      8.      PARTNO - Part Number



Options:
 Accept   # line   Line by line   Add item   Delete   ? Help   Exit
```

Subfield Definitions

```
               HOLDINGS DISPLAY DEFINITION SUBFIELD DEFINITIONS   MASTER

          CODE  : HOLDINGS.MAINT.DISPLAY
         FIELD  : 1  - Part number
      SUBFIELD  : 8

  1. SOURCE    : PARTNO     - Part Number
  2. PREFIX    :
  3. SUFFIX    :

Options:
   Accept   Line by line   # line   Delete   ? Help   Exit
```

Source Codes

Source Code	Description of Information Displayed
BOUNDFLG	Pieces Bound Flag. Displays Y or N to indicate whether the item (piece/part) is bound (barcoded).
DATE	Date last edited
DESC	Description of the type of holding associated with this part.
FEE	Copyright article fee code
LINK	Parts Linking Flag. Displays Y or N to indicate whether the part is linked to the current piece.
PARTNO	Part Number including captions and numbering, i.e., vol.12:iss.1(1998:JAN)
PARTSKEY	Parts record key
STAT	Status. Indicates the status of the part, such as received, not expected, in bindery, and so forth.
TIME	Time last edited
TITLE	Part title
TYPE	Publication Pattern Type (issue, index, supplement)
USER	User who last edited this record

Where Used

The Parts to Piece Linking Summary screen can be accessed:

•   from the PIECES DETAIL screen enter ?? in the *Volume/Part#* field.
     The LINKED PARTS screen appears. Use the *Link* option to display the
     LINK PARTS TO PIECE screen.

Parts to Order Linking Summary

Displays a list of parts linked to an order.

Example Parts to Order Linking Summary

```
              Online Catalogue LINK PARTS TO ORDER

 LCN     : 10009894                              ISSN: 0009-5982
 TITLE   : The Chronicle of higher education
 IMPRINT :                                       LCCN:

      Part number                Type                 Link?
      -----------                ----                 -----
 1.  Yr. 1996                    Annual Yearbook       N
 2.  Yr. 1995                    Annual Yearbook       N
 3.  Yr. 1994                    Annual Yearbook       N
 4.  Yr. 1994                    Annual Yearbook       Y
 5.  Yr. 1993                    Annual Yearbook       Y




 5 item(s) in list
 Options:
  Retrieve item(s)   # item   Insert at line #   Mark item(s)   Limit list
  Quit holdings    ? Help   Exit
```

Access

Select *Parts to Order Linking Summary* from the `HOLDINGS DISPLAY DEFINITION` menu. The HOLDINGS DISPLAY DEFINITION screen appears.

```
                HOLDINGS DISPLAY DEFINITION                    MASTER

    CF record : HOLDINGS.MAINT.DISPLAY
      ***  PARTS TO ORDER LINKING SUMMARY  ***

FIELD BASELINE COLUMN WIDTH LINES HEADING                 DEFAULT TEXT
  1.    1       7     23     0  Part number              nothing to s
                                -----------
  2.    1      40     20     1  Type
                                ----
  3.    1      63      5     1  Link?
                                -----



Options:
 File   # line   Add item   ? Help   Exit
```

Select the # line option to edit the display or select the *Add item* option to create a new field. The HOLDINGS DISPLAY DEFINITION SCREEN SUBFIELD BROWSE screen appears.

```
       HOLDINGS DISPLAY DEFINITION SCREEN SUBFIELD BROWSE          MASTER

           CODE :   HOLDINGS.MAINT.DISPLAY
          FIELD :   1

1. FIELD BASELINE:    1
2. FIELD COLUMN  :    7
3. FIELD WIDTH   :   23
4. FIELD LINES   :    0
5. FIELD HEADING1:  Part number
6. FIELD HEADING2:  -----------
7. FIELD DEFAULT :  nothing to see
   SUBFIELD  SOURCE                            PREFIX    SUFFIX
     8.      PARTNO - Part Number



Options:
 Accept   # line   Line by line   Add item   Delete   ? Help   Exit
```

Subfield Definitions

```
              HOLDINGS DISPLAY DEFINITION SUBFIELD DEFINITIONS   MASTER

          CODE  : HOLDINGS.MAINT.DISPLAY
         FIELD  : 1  - Part number
      SUBFIELD  : 8

1. SOURCE     : PARTNO     - Part Number
2. PREFIX     :
3. SUFFIX     :




Options:
 Accept   Line by line   # line   Delete   ? Help   Exit
```

Source Codes

Source Code	Description of Information Displayed
DATE	Date last edited
DESC	Description of the type of holding associated with this part.
FEE	Copyright article fee code
LINK	Parts Linking Flag. Displays Y or N to indicate whether the part is linked to an order.
PARTNO	Part Number including captions and numbering, i.e., vol.12:iss.1(1998:JAN)
PARTSKEY	Parts record key
TIME	Time last edited
TITLE	Part title
TYPE	Publication Pattern Type (issue, index, supplement)
USER	User who last edited this record

Where Used

The Parts to Order Linking Summary screen can be accessed:

- from the ORD – ORDERING DATA screen select the *Type of holdings* option. The LINKED TYPE OF HOLDING screen appears. Use the *Link* option to display the LINK TYPE OF HOLDING TO ORDER screen.

Parts Sequencing Summary

Displays a sorted list of parts. Parts are sorted by Type of Holding and in a chronological order, or as specified by the library.

Example Parts Sequencing Summary

```
            SEQUENCE PARTS                              MASTER

 LCN     :10008609   Call #: UNC                   ISSN: 0009-5982
 Title   :The Chronicle of higher education
 Imprint :[Washington, etc., Chronicle of higher e+    LCCN: sf 80001055

       Part Number              Type of Holding
       -----------              ---------------
  1.  Vol.45:No.9(SEP:16:1998)  Paper
  2.  Vol.45:No.8(SEP:02:1998)  Paper
  3.  Vol.45:No.7(AUG:19:1998)  Paper
  4.  Vol.45:No.6(AUG:05:1998)  Paper
  5.  Vol.45:No.5(DEC:22:1998)  Paper


 113 item(s) in list
 Options:
  # line(s) to move    Forward   Quit holdings   ? Help   Exit
```

Access

Select *Parts Sequencing Summary* from the *HOLDINGS DISPLAY DEFINITION* screen. The HOLDINGS DISPLAY DEFINITION screen appears.

```
                   HOLDINGS DISPLAY DEFINITION                    MASTER

     CF record : HOLDINGS.MAINT.DISPLAY
       ***  PARTS SEQUENCING SUMMARY  ***

FIELD BASELINE COLUMN WIDTH LINES HEADING                DEFAULT TEXT
  1.     1       7     23    0   Part Number
                                 -----------
  2.     1      33     20    1   Type of Holding
                                 ---------------




Options:
 File   # line   Add item   ? Help   Exit
```

Select the # line option to edit the display or select the *Add item* option to create a new field. The HOLDINGS DISPLAY DEFINITION SCREEN SUBFIELD BROWSE screen appears.

```
       HOLDINGS DISPLAY DEFINITION SCREEN SUBFIELD BROWSE         MASTER

          CODE :   HOLDINGS.MAINT.DISPLAY
         FIELD :   1

1. FIELD BASELINE:    1
2. FIELD COLUMN  :    7
3. FIELD WIDTH   :   23
4. FIELD LINES   :    0
5. FIELD HEADING1:  Part Number
6. FIELD HEADING2:  -----------
7. FIELD DEFAULT :
   SUBFIELD  SOURCE                              PREFIX    SUFFIX
     8.     PARTNO - Part Number



Options:
 Accept   # line   Line by line   Add item   Delete   ? Help   Exit
```

Subfield Definitions

```
                 HOLDINGS DISPLAY DEFINITION SUBFIELD DEFINITIONS   MASTER

          CODE  : HOLDINGS.MAINT.DISPLAY
         FIELD  : 1  - Part Number
      SUBFIELD  : 8

 1. SOURCE    : PARTNO    - Part Number
 2. PREFIX    :
 3. SUFFIX    :




 Options:
  Accept   Line by line   # line   Delete   ? Help   Exit
```

Source Codes

Source Code	Description of Information Displayed
DATE	Date last edited
DESC	Description of the type of holding associated with this part
FEE	Copyright article fee code
PARTNO	Part Number including captions and numbering, i.e., vol.12:iss.1(1998:JAN)
PARTSKEY	Parts record key
TIME	Time last edited
TITLE	Part title
TOHKEY	Type of Holding record key
TYPE	Publication Pattern Type (issue, index, supplement)
USER	User who last edited this record

Where Used

The Parts Sequencing Summary screen can be accessed:

- from the TYPE OF HOLDING DETAIL screen select the *Parts* option. The PARTS SUMMMARY screen appears. Use the *Sequence parts* option to display the SEQUENCE PARTS screen.

Serial Copy Set Summary

Displays list of copy sets sorted by location.

Example Serial Copy Set Summary

```
                 Online Catalogue SERIAL COPY SET SUMMARY
Local Control #:  10008609                            Format  : SE
Title     : The Chronicle of higher education
Author    : Editorial Projects for Education, Inc.
Publisher : Chronicle of higher education, etc.] 1966


Last update: 12 JUN 1997 System

     Physical Location    Collection/Call number/Copy      Vendor    Status
     ----------------     --------------------------       ------    ------
 1.  ADVLIB Central       GENERAL c.1                      FAXON     Claimed
     Notes: Purchase copy
 2.  ADVLIB Central       GENERAL c.2                      FAXON     Claimed
     Notes: Purchase copy
 3.  ADVLIB Central       GENERAL c.3                      JW&S      Claimed
     Notes: Copyright deposit 2nd copy
 4.  ADVLIB Central       GENERAL c.4                      JW&S      Claimed
     Notes: Copyright Deposit 1st copy

4 item(s) in list
Options:
 # item   Add item   Go to   MARC   Limit list   Quit holdings   ? Help
 Exit
```

Access

Select *Serial Copy Set Summary* from the *HOLDINGS DISPLAY DEFINITION* menu. The HOLDINGS DISPLAY DEFINITION screen appears.

```
                    HOLDINGS DISPLAY DEFINITION                      MASTER

     CF record : HOLDINGS.MAINT.DISPLAY
       ***   SERIAL COPY SET SUMMARY  ***

  FIELD BASELINE COLUMN WIDTH LINES HEADING                      DEFAULT TEXT
    1.     1       7     20     1  Physical Location
                                   ----------------
    2.     1      28     30     0  Collection/Call number/Copy
                                   --------------------------
    3.     1      61      8     1  Vendor
                                   ------
    4.     1      71      8     1  Status
                                   ------
    5.     2       7     65     0  Notes:




  Options:
   File   # line   Add item   ? Help   Exit
```

Select the # line option to edit the display or select the *Add item* option
to create a new field. The HOLDINGS DISPLAY DEFINITION SCREEN
SUBFIELD BROWSE screen appears.

```
          HOLDINGS DISPLAY DEFINITION SCREEN SUBFIELD BROWSE          MASTER

              CODE :   HOLDINGS.MAINT.DISPLAY
             FIELD :   2

1. FIELD BASELINE:    1
2. FIELD COLUMN  :   28
3. FIELD WIDTH   :   30
4. FIELD LINES   :    0
5. FIELD HEADING1:  Collection/Call number/Copy
6. FIELD HEADING2:  -------------------------
7. FIELD DEFAULT :
   SUBFIELD  SOURCE                                    PREFIX    SUFFIX
      8.      COLL      - Collection Code                          @/
      9.      CNPRE     - Call number prefix            @
     10.      CALLNO    - Call number                   @         @/
     11.      COPYNO    - Copy number                   @c.       @/



Options:
 Accept   # line   Line by line   Add item   Delete   ? Help   Exit
```

Subfield Definitions

```
             HOLDINGS DISPLAY DEFINITION SUBFIELD DEFINITIONS  MASTER

         CODE  : HOLDINGS.MAINT.DISPLAY
        FIELD  : 2  - Collection/Call number/Copy
     SUBFIELD  : 8

1. SOURCE    : COLL      - Collection Code
2. PREFIX    :
3. SUFFIX    : @/




Options:
 Accept   Line by line   # line   Delete   ? Help   Exit
```

Source Codes

Source Code	Description of Information Displayed
CALLNO	Call number
CLAIM	Claim Code
CNCLASS	Call number - Classification
CNCUTTER	Call number - Cutter
CNPRE	Call number prefix
CNSCN	Call number - Shelving Control Number
CNSUF	Call number - suffix
COLL	Collection Code
COPYNO	Copy number
DATE	Date last edited
INST	Institution Code
NOTE	Notes for this copy set
NOTE	Notes for this copy set
ORDDATE	Purchase Order date
ORDTYPE	Purchase Order type
ROUTE	Routing Flag. Displays Y or N to indicate whether the copy set is linked to a routing list.
SCPYKEY	Serial Copy ID
SHIPTO	Shipto code
SRTEKEY	Serials Routing ID
STAT	Copy Set Status. Indicates the status of the copy set, such as claimed, active, inactive, and so forth.
SUBL	Sublocation Code
TIME	Time last edited
USER	User who last edited the record

VEND	Vendor Code

Where Used

The Serial Copy Set Summary screen can be accessed:

• when the *Holdings edit* option is selected the *Serial copy display* option appears.

Serial Copy Set Summary (Checkin)

Displays list of copy sets sorted by location.

Example Serial Copy Set Summary

```
              SERIAL COPY SET SUMMARY                         MASTER

 LCN     :10008609   Call #: UNC                       ISSN: 0009-5982
 Title   :The Chronicle of higher education
 Imprint :[Washington, etc., Chronicle of higher e+      LCCN: sf 80001055


      Location                 SHIPTO    Status    Route list  Vendor
      --------                 ------    ------    ----------  ------
  1.  ADVLIB Central GENERAL   UNIT5     Claimed   P91000170   FAXON
      c.1
      Notes: Purchase copy
  2.  ADVLIB Central GENERAL   UNIT5     Claimed   P91000171   FAXON
      c.2
      Notes: Purchase copy
  3.  ADVLIB Central GENERAL   UNIT5     Claimed   P91000169   JW&S
      c.3
      Notes: Copyright deposit 2nd copy


 4 item(s) in list
 Options:
  Check in   Holdings   Claims   Order detail   Forward   Limit list   Go to
  ? Help    Exit
```

Access

Select *Serial Copy Set Summary (Checkin)* from the HOLDINGS DISPLAY DEFINITION menu. The HOLDINGS DISPLAY DEFINITION screen appears.

```
           HOLDINGS DISPLAY DEFINITION                      MASTER

   CF record : HOLDINGS.MAINT.DISPLAY
     ***  SERIAL COPY SET SUMMARY (CHECKIN)  ***

FIELD BASELINE COLUMN WIDTH LINES HEADING                  DEFAULT TEXT
  1.     1       7     25    0   Location
                                 --------
  2.     1      34      8    0   SHIPTO
                                 ------
  3.     1      44      8    1   Status
                                 ------
  4.     1      54     10    1   Route list               Not Routed
                                 ----------
  5.     1      66     12    1   Vendor
                                 ------
  6.     2       7     60    0   Notes:


Options:
 File   # line   Add item   ? Help   Exit
```

Select the # line option to edit the display or select the *Add item* option
to create a new field. The HOLDINGS DISPLAY DEFINITION SCREEN
SUBFIELD BROWSE screen appears.

```
       HOLDINGS DISPLAY DEFINITION SCREEN SUBFIELD BROWSE          IIIIII

         CODE :   HOLDINGS.MAINT.DISPLAY
        FIELD :   1

1. FIELD BASELINE:    1
2. FIELD COLUMN  :    7
3. FIELD WIDTH   :   20
4. FIELD LINES   :    1
5. FIELD HEADING1:  Location
6. FIELD HEADING2:  --------------------
7. FIELD DEFAULT :
   SUBFIELD  SOURCE                                PREFIX    SUFFIX
     8.      INST     - Institution Code
     9.      SUBL     - Sublocation Code           @
    10.      COLL     - Collection Code            @
    11.      COPYNO   - Copy number                @c.



Options:
 Accept   # line   Line by line   Add item   Delete   ? help   Exit
```

Subfield Definitions

```
            HOLDINGS DISPLAY DEFINITION SUBFIELD DEFINITIONS       IIIIII

        CODE  : HOLDINGS.MAINT.DISPLAY
       FIELD  : 1  - Location
    SUBFIELD  : 8

1. SOURCE    : INST      - Institution Code
2. PREFIX    :
3. SUFFIX    :




Options:
 Accept   Line by line   # line   Delete   ? help   Exit
```

Source Codes

Source Code	Description of Information Displayed
CALLNO	Call number
CLAIM	Claim Code
CNCLASS	Call number - Classification
CNCUTTER	Call number - Cutter
CNPRE	Call number prefix
CNSCN	Call number - Shelving Control Number
CNSUF	Call number - suffix
COLL	Collection Code
COPYNO	Copy number
DATE	Date last edited
INST	Institution Code
NOTE	Notes for this copy set
ORDDATE	Purchase Order date

ORDTYPE	Purchase Order type
PONO	Purchase Order number
ROUTE	Routing Flag. Displays Y or N to indicate whether the copy set is linked to a routing list.
SCPYKEY	Serial Copy record key
SHIPTO	Shipto code
SRTEKEY	Serials Routing ID
STAT	Copy Set Status. Indicates the status of the copy set, such as claimed, active, inactive, and so forth.
SUBL	Sublocation Code
TIME	Time last edited
USER	User who last edited the record
VEND	Vendor Code

Where Used

The Serial Copy Set Summary (Checkin) screen can be accessed:

• when the *Holdings edit* option is selected the *Check-in serials* option appears.

Holdings Client Display Definition (HCDD)

The Holdings Client Display Definition menu allows you to specify how holdings information displays to staff in the ADVANCE client products. From these screens you can:

- specify the format of the holdings summary forms.

- edit the column headings.

- change the content of the column by identifying a source code that links the required information to a list of available codes.

Access   You can access the Holdings Client Display Definition by entering HCDD on any cataloguing menu or select it from the Cataloguing Holdings Menu which is available from the HOLDING SETUP MENU (CHSM).

```
DD MMM YYYY            Geac ADVANCE Library System (#.##)        PPPPPP   IIII
   HH:MM                       Your Library Name

                   HOLDINGS CLIENT DISPLAY DEFINITION

            1. Location Copy Summary
            2. Type of Holding Summary
            3. Type of Holding Summary (Location Holdings Statements)
            4. Type of Holding Linking Summary
            5. Publication Pattern Summary
            6. Publication Pattern Summary (Location Holdings Statements)
            7. Parts Summary
            8. Pieces Summary
            9. Pieces / Parts Summary
           10. Parts to Piece Linking Summary
           11. Parts to Order Linking Summary
           12. Parts Sequencing Summary
           13. Serial Copy Set Summary
           14. Serial Copy Set Summary (Checkin)
           15. Order Summary (Checkin)
        Enter selection or <ENTER> to exit  :
```

Each menu item consists of these components:

- CLIENT HOLDINGS DISPLAY DEFINITION. Displays a numbered list of fields which define the column headings for each summary form. From this screen you can select a column heading to edit. You can also add a column heading.

- HOLDINGS DISPLAY DEFINITION SCREEN SUBFIELD BROWSE. Allows you to edit and format the appearance of one of the columns of the Summary Display column headings. Provides access to the SUBFIELD SOURCE field from which you can change the content of the field.

- HOLDINGS DISPLAY DEFINITION SUBFIELD DEFINITIONS. Appears when the *SUBFIELD SOURCE* field is selected from the previous screen. Allows you to change the content of the column by identifying a different source code. For example, under the column heading Physical Location you could display the Institution Code.

Holdings Forms

The following forms are defined from the CLIENT HOLDINGS DISPLAY DEFINITION menu:

• Location Copy Summary

Defines the columns and fields that display on the general LOCATION COPY SUMMARY forms.

• Type of Holding Summary

Defines the columns and fields that display on the general TYPE OF HOLDING SUMMARY forms.

• Type of Holding Summary (Location Holdings Statements)

Defines the columns and fields that display on the TYPE OF HOLDING SUMMARY when holdings statements are being displayed for a specific Location copy detail.

• Type of Holding Linking Summary

Defines the columns and fields that display on the LINK TYPE OF HOLDING TO COPY SET when linking type of holding records to a copy set or purchase order.

• Publication Pattern Summary

Defines the columns and fields that display on the general PUBLICATION PATTERN SUMMARY forms.

• Publication Pattern Summary (Location Holdings Statements)

Defines the columns and fields that display on the PUBLICATION PATTERN form when holdings statements are being displayed for a specific Location copy detail.

• Parts Summary

Defines the columns and fields that display on the general PARTS SUMMARY form. This definition is also used on the LINKED PARTS form when displaying the parts linked to the current piece.

• Pieces Summary

Defines the columns and fields that display on the general PIECES SUMMARY and the more specific PIECES SUMMARY (Holds) forms.

- Pieces / Parts Summary

  Defines the columns and fields that display on the PIECES / PARTS SUMMARY form when the *Pieces/parts* option is chosen from a specific Location copy detail. The summary form displays both pieces and parts that are held at the specific location.

- Parts to Piece Linking Summary

  Defines the columns and fields that display when linking new parts to a current piece.

- Parts to Order Linking Summary

  Defines the columns and fields that display when linking new parts to a current order in Acquisitions.

- Parts Sequencing Summary

  Defines the columns and fields that display on the SEQUENCE PARTS summary form after the user has chosen the *Sequence parts* option to resequence the order in which a type of holding's parts display.

- Serial Copy Set Summary

  Defines the columns and fields that display on the general SERIAL COPY SET SUMMARY form.

- Serial Copy Set Summary (Checkin)

  Defines the columns and fields that display on the SERIAL COPY SET SUMMARY form that displays within Serials Checkin.

- Order Summary (Checkin)

  Defines the columns and fields that display on the COPY SET SUMMARY - ORDER SUMMARY form that displays within Serials Checkin.

General Definition

Select definitions 1 through 14 on the menu to edit the content and layout for the forms listed. Any of these choices displays the screen titled CLIENT HOLDINGS DISPLAY DEFINITION.

```
              CLIENT HOLDINGS DISPLAY DEFINITION                MASTER

   CF record : CLIENT.HOLDINGS.MAINT.DISPLAY
     ***   LOCATION COPY SUMMARY   ***

FIELD          COLUMN WIDTH LINES HEADING                    DEFAULT TEXT
  1.              1     20    1   Physical Location

  2.              2     30    3   Collection/Call number/Copy

  3.              3     18    1   Format                     not defined

  4.              4     70    1   Access :




Options:
 File   # line   Add item   ? help   Exit
```

The columns on this screen define the headings and their position on the summary forms presenting the library's holdings. In this example, the LOCATION COPY SUMMARY listing would be displayed with information on the physical location, collection, call number, copy number, physical format, and electronic access.

This screen also defines the default text for display.

Use the *# line* or *Add item* option to access the definition of an existing column or to add a new field to the form. The HOLDINGS DISPLAY DEFINITION SCREEN SUBFIELD BROWSE screen is displayed.

```
         HOLDINGS DISPLAY DEFINITION SCREEN SUBFIELD BROWSE          MASTER

            CODE :    CLIENT.HOLDINGS.MAINT.DISPLAY
          FIELD :    1

1. COLUMN NUMBER :    1
2. COLUMN WIDTH  :   20
3. COLUMN HEIGHT :    1
4. COLUMN HEADING:  Physical Location
5. COLUMN DEFAULT:


   SUBFIELD  SOURCE                                  PREFIX      SUFFIX
     6.      INST      - Institution Code               @           @
     7.      SUBL      - Sublocation Code               @           @
     8.



Options:
 Accept   # line   Line by line   Add item   Delete   ? help   Exit
```

Fields

These fields are common to all holdings screen definitions.

1. COLUMN NUMBER   [Numeric]

Specifies the position where the column displays. The numbering of columns starts at 1.

2. COLUMN WIDTH   [Numeric]

Defines the width of the column.

3. COLUMN HEIGHT   [Numeric, 1-10]

Defines the maximum number of lines that will be displayed within this column.

4. COLUMN HEADING   [Text]

Defines the text that appears as the column heading for this column.

5. COLUMN DEFAULT   [Text]

Defines the text that appears in the column if the field(s) displayed is empty. NOTE: Any defined column which contains an Action/Status value will not use this field for the default. The Pieces Description table on the OPAC Holdings Display menus (OHD) defines the default text to display for pieces with null status.

Subfield Definitions

Provides a summary list of data elements which are to be extracted and displayed in the column.

Select a subfield by using the *# line* option or add a new entry by using the *Add item* option. The HOLDINGS DISPLAY DEFINITION SUBFIELD DEFINITIONS screen appears.

```
            HOLDINGS DISPLAY DEFINITION SUBFIELD DEFINITIONS   MASTER

         CODE  : CLIENT.HOLDINGS.MAINT.DISPLAY
        FIELD  : 1  - Physical Location
     SUBFIELD  : 8

 1. SOURCE     : INST       - Institution Code
 2. PREFIX     : @
 3. SUFFIX     : @



 Options:
  Accept   Line by line   # line   Delete   ? Help   Exit
```

This screen allows you to define a single data element (and related information) which displays in the defined column.

Each of the 15 summary definitions has a valid list of source codes that you can choose from. Some source codes allow you to display Institution information, others allow you to display a piece's current status. The specific source codes available for each summary definition are described in the separate sections describing each summary definition:

- For descriptions of *1. Location Copy Summary* to *14. Serial Copy Set Summary (Checkin)*, see the corresponding non-client descriptions in

the subsections following the "Holdings Display Definition (HDD)" section earlier.

- For a description of *15. Order Summary (Checkin)*, see the next section.

1. SOURCE   Enter the source code that defines what should appear in this subfield. Type ?? to see a browse list of available source codes.

2. PREFIX   Enter the text that appears at the beginning of the display element, if it is non-null. Use the symbol @ to indicate a blank space.

3. SUFFIX   Enter the text that appears at the end of the non-null display element. Use the symbol @ to indicate a blank space.

Order Summary (Checkin)

Displays list of orders sorted by location.

Example Order Summary

Copy Set Summary - Order Summary

This is a Multipart Record.

Full Details

Limit by

[   ] [From Checkin List ▾] Limit List   7 out of 7 item(s)

	LOCATION	PO# /LINE#	VENDOR	ORDER DATE
1	ACAD LRC Audio/Visual c.123	9500035252/0001	ALA	Feb 10 2000
2	ACAD LRC Audio/Visual c.95	9500035252/0001	FAXON	Feb 10 2000
3	ACAD LRC Audio/Visual	9500035255/0001	FAXON	Feb 14 2000
4	ACAD LRC Audio/Visual c.99	9500035255/0001	FAXON	Feb 14 2000
5	ACAD LRC Audio/Visual c.99	9500035256/0001	FAXON	Feb 15 2000
6	ACAD LRC Audio/Visual	9500035256/0001	FAXON	Feb 15 2000
7	PUBLIC BRA1		FAXON	

Access

Select *Order Summary (Checkin)* from the HOLDINGS CLIENT DISPLAY DEFINITION menu. The CLIENT HOLDINGS DISPLAY DEFINITION screen appears.

```
                   CLIENT HOLDINGS DISPLAY DEFINITION               MASTER

     CF record : CLIENT.HOLDINGS.MAINT.DISPLAY


 FIELD         COLUMN WIDTH LINES HEADING                    DEFAULT TEXT
   1.             1    30    1   LOCATION

   2.             2    20    1   PO#  /LINE#

   3.             3    15    1   VENDOR

   4.             4    20    1   ORDER DATE




 Options:
  File   # line   Add item   ? help   Exit
```

Select the # line option to edit the display or select the *Add item* option
to create a new field. The HOLDINGS DISPLAY DEFINITION SCREEN
SUBFIELD BROWSE screen appears.

```
        HOLDINGS DISPLAY DEFINITION SCREEN SUBFIELD BROWSE          MASTER

          CODE :   CLIENT.HOLDINGS.MAINT.DISPLAY
         FIELD :   1

 1. COLUMN NUMBER :    1
 2. COLUMN WIDTH  :   30
 3. COLUMN HEIGHT :    1
 4. COLUMN HEADING:  LOCATION
 5. COLUMN DEFAULT:


    SUBFIELD  SOURCE                              PREFIX   SUFFIX
      6.      INST     - Institution Code
      7.      SUBL     - Sublocation Code          @
      8.      COLL     - Collection Code           @
      9.      COPYNO   - Copy number               @c.


 Options:
  Accept   # line   Line by line   Add item   Delete   ? help   Exit
```

Subfield Definitions

```
              HOLDINGS DISPLAY DEFINITION SUBFIELD DEFINITIONS   MASTER

         CODE  : CLIENT.HOLDINGS.MAINT.DISPLAY
        FIELD  : 1  - LOCATION
     SUBFIELD  : 8

1. SOURCE    : INST      - Institution Code
2. PREFIX    :
3. SUFFIX    :




Options:
 Accept   Line by line   # line   Delete   ? help   Exit
```

Source Codes

Source Code	Description of Information Displayed
CALLNO	Call number
CLAIM	Claim Code
CNCLASS	Call number - Classification
CNCUTTER	Call number - Cutter
CNPRE	Call number prefix
CNSCN	Call number - Shelving Control Number
CNSUF	Call number - suffix
COLL	Collection Code
COPYNO	Copy number
DATE	Date last edited
INST	Institution Code
NOTE	Notes for this copy set
ORDDATE	Purchase Order date

Source Code	Description of Information Displayed
ORDTYPE	Purchase Order type
PONO	Purchase Order number
ROUTE	Routing Flag. Displays Y or N to indicate whether the copy set is linked to a routing list.
SCPYKEY	Serial Copy record key
SHIPTO	Shipto code
SRTEKEY	Serials Routing ID
STAT	Copy Set Status. Indicates the status of the copy set, such as claimed, active, inactive, and so forth.
SUBL	Sublocation Code
TIME	Time last edited
USER	User who last edited the record
VEND	Vendor Code

Where Used

The Order Summary (Checkin) form can be accessed:

• when the *Order display* option is selected in the ADVANCE Holdings Client.

Publication Pattern Type Code (`PUBP`)

This table enables your library to designate a code representing one of the three types of publication patterns:

- Bibliographic unit

  This is the basic serials publication pattern. It is composed of the units that reflect the most regular receiving pattern for the serials item. It can be a printed paper publication, computer tape, audio tape, video tape or any item that is prepaid and is subsequently produced on a regular chronological basis. For example, the bibliographic unit of a subscription to *National Geographic* is the printed magazine that arrives every month.

- Index

  This is an extra to the bibliographic unit. This serials item will index the information in a single bibliographic unit or multiple bibliographic units. For example, a subscription to *National Geographic* can have a yearly index that covers the 12 issues received over the past year.

- Supplement

  This is also an extra to the bibliographic unit. It is any serials item received that is not a bibliographic unit or an index. For example, a subscription to *National Geographic* regularly provides maps with its magazines. These maps can be classified as supplements.

Access

Enter PUBP or the corresponding menu number to access the PUBLICATION PATTERN CODE table from:

- the Holding Setup Menu (CHSM) in Cataloguing
- the Serial control Code Table (CODM) in Serials Control

Initial screen

```
                     PUBLICATION PATTERN CODE - (PUBP)

        Number of records : 3
        Code            Description of code
        -------------   --------------------------------------------------
    1.  0               ISS
    2.  1               IND
    3.  2               SUP




Options:
   ? Help   # line   Print   Forward   Backward   Search jump   Exit
```

Detail Screen

```
                     PUBLICATION PATTERN CODE - (PUBP)

       : 0
       ------------------------------------------------------------------
    1. Description                     : ISS
    2. Type                            : 0
       0 - Bibliographic unit
       1 - Index
       2 - Supplement




Options:
   ? Help   # line   Line by line   Copy   Print   Exit
```

Fields

Publication Pattern Code	[0, 1, 2]
1. Description	[1-3 character]
	Brief description of the Publication Pattern Code.
2. Type	[1 digit]
	Enter one of the numeric codes shown on the screen. These codes correspond to the three types of serials: Bibliographic unit, Index, and Supplement.

Where Used

You can assign Publication Pattern Codes on the Type of Holding Detail screen:

• in the *Publication Type* field

Frequency Codes (FREQ)

These codes are used by the system for calculating publication patterns and for predicting the future dates in the patterns.

Access

Enter FREQ or the corresponding menu number to access the FREQUENCY CODE table.

Initial screen

```
                  FREQUENCY CODE - (FREQ)


     Number of records : 19
     Code  Description of code
     ----  -----------------------------------------------------------
 1. a     Annual
 2. b     Bimonthly
 3. c     Semiweekly
 4. d     Daily
 5. e     Biweekly (every 2 weeks)
 6. f     Semiannual
 7. g     Biennial (every 2 years)
 8. h     Triennial (every 3 years)
 9. i     Three times a week
10. j     Three times a month
11. m     Monthly
12. q     Quarterly
13. s     Semimonthly
14. t     Three times a year

Options:
 ? help   Add item   # line   Print   Forward   Backward   Search jump
 Exit
```

Detail Screen

```
                         FREQUENCY CODE - (FREQ)

      : m
      -------------------------------------------------------------------
  1. Description     : Monthly
  2. Type            : 10
     0 - a - Annual                    9 - j - Three times a month
     1 - b - Bimonthly               10 - m - Monthly
     2 - c - Semiweekly              11 - q - Quarterly
     3 - d - Daily                   12 - s - Semimonthly
     4 - e - Biweekly (every 2 weeks) 13 - t - Three times a year
     5 - f - Semiannual              14 - w - Weekly
     6 - g - Biennial (every 2 years) 15 - x - Completely irregular
     7 - h - Triennial (every 3 years) 16 - v - Quadrennial (every 4 years)
     8 - i - Three times a week      17 - y - Quinquennial (every 5 years)
                                     18 - z - Decennial (every 10 years)




  Options:
   ? help    # line   Line by line   Copy   Print   Delete   Exit
```

Fields

Frequency Code   [1-2 character code]

1. Description   [Text]

                        Brief description of the Frequency Code.

2. Type   [0 to 18]

                        Enter a number. These numbered codes correspond to the available
                        publication frequencies.

Where Used

                        You can assign a Frequency Code on the:

                        • PUBLICATION PATTERN DETAIL screen — (in the *FREQUENCY CODE*
                          field).

Chronology Codes (CHRN)

These codes help the system calculate the chronological pattern attached to a serial item.

Access

Enter CHRN or the corresponding menu number to access the CHRONOLOGY CODE table from the:

- Holdings Setup Menu (CHSM)

- Serials Control Code Table (CODM).

Initial screen

```
                    CHRONOLOGY CODE - (CHRN)

     Number of records : 12
     Code   Description of code
     -----  -----------------------------------------------------------
  1. D      Date type
  2. DAILY  Day of the week
  3. DD     Day of Month
  4. M      Months type
  5. M-L    Monthly - long names
  6. NP     No predictions
  7. Q      Quarterly
  8. S      Seasons type
  9. SPLMN  SPLIT MONTH
 10. SPLYR  SPLIT YEAR
 11. Y      Year
 12. quart  Quarterly


 Options:
  ? help   Add item   # line   Print   Forward   Backward   Search jump
  Exit
```

Detail Screen

```
                      CHRONOLOGY CODE - (CHRN)

       : M
     ------------------------------------------------------------------
1. Description        : Months type
2. Type               : 1
   0 - Date                          4 - Day of month
   1 - Months                        5 - Day of week
   2 - Seasons                       6 - No predictions
   3 - Year (YYYY)                   7 - Split year (previous/current)
                                     8 - Split year (current/next)
3. Date format        :
4. Valid Predictions  : JAN,FEB,MAR,APR,MAY,JUN,JUL,AUG,SEP,OCT,NOV,DEC
5. Split year format  :
    0 - YYYY/YYYY, 1 - YYYY/YY, 2 - YY/YY
6. Split year separator:


Options:
 ? help   # line   Line by line   Copy   Print   Delete   Exit
```

Fields

Chronology Code   [1-5 character code]

1. Description   [Text]

                           Brief description of the Chronology Code.

2. Type   [0-8 as defined below]

                           Choose one of the following prediction pattern types:

0   If Date type is chosen, enter a valid date format at field 3. Otherwise,
       field 3 can be left blank.

1   If Months type is chosen, define the chronology constants (e.g., JAN,
       FEB, etc.) to be used for predictions, starting at January and using 12
       units (each unit represents a month of the year). These chronology
       constants are entered in field 4, *Valid Predictions*. At checkin, the system
       assigns a chronology constant to the issue's chronology. The value
       assigned is based on the month of publication and its associated valid

prediction. Using the M Chronology Code shown above, an issue published in the fifth month of the year is assigned a value of 'MAY'.

2   If Seasons type is chosen, define the chronology constants (e.g., WINTER, SPRING, etc.) to be used for predictions, starting at the season represented by January and using 12 units. These chronology constants are entered in field 4, *Valid Predictions*.

3   If Year type is chosen, the system assigns a four digit year to the issue's chronology. The year is determined from the date of the publication.

4   If Day of month type is chosen, the system assigns a number between 1 and 31 to the issue chronology. This number is determined from the date of publication.

5   If Day of week type is chosen, define 7 chronology constants (e.g., SUN, MON, etc.) starting at the constant representing Sunday. These chronology constants are entered in field 4, *Valid Predictions*.

6   If No predictions type is chosen, the system will not make predictions for the next expected serial item.

7   If Split year (previous/current) is chosen, define the format (field 5) and the separator (field 6) that is used to build the chronology. At checkin, the system assigns a chronology constant to the issue's chronology. The value assigned includes the year prior to the issue's year of publication as well as the year of publication. The actual format of the chronology is based on the format and separator assigned in fields 5 and 6. For example, to assign a chronology of 89/90 to an item that is published in January 1990, set field 2 to 7, field 5 to 2 and field 6 to " / ".

8   If Split year (current/next) is chosen, define the format (field 5) and separator (field 6) that is used to build the chronology. At checkin, the system assigns a chronology constant to the issue's chronology. The value assigned includes the issue's year of publication as well as the year immediately following the publication date. The actual format of the chronology is based on the format and separator assigned in fields 5 and 6. For example, to assign a chronology of 90/91 to an item that is published in January 1990, set field 2 to 8, field 5 to 2, and field 6 to " /".

3. Date format	[1-3 character]

If you entered a zero (0) in field 2, choose one of the valid entries displayed at the bottom of the screen. This field imposes a specific pattern for date entry. If this field is blank, any date format can be used. The *Date format* field can have the following values:

D0
  dd MMM — e.g. "22 APR"

D
  dd MMM yyyy — e.g. "22 APR 1992"

D0/
  dd/mm (or mm-dd) — e.g. "22/04" (or "04/22")

D/
  dd/mm/yyyy (or mm/dd/yyyy) — e.g. "22/04/1992" (or "04/22/1992")

D2/
  dd/mm/yy (or mm/dd/yy) — e.g. "22/04/92" (or "04/22/92").

System setup determines whether the month comes before or after the day in the `D0-`, `D-`, and `D2-` formats.

4. Valid Predictions	[Text]

Enter text descriptions of the chronology pattern. This text will appear on the checkin screen. There are 2 pattern types used in the valid predictions field: months and days of the week.

The 12 slot pattern corresponds to *months*, where the first slot = month 01 or January.

The 7 slot pattern is for the *days of the week*, where the first slot corresponds to Sunday (slot 1) and the seventh slot corresponds to Saturday (slot 7).

For example, if a season description is required, the description should be entered as follows, using the 12 month pattern.

```
Winter,Winter,Winter,Spring,Spring,Spring,Summer,Summer,Summer,Fall,Fall,Fall
```

Commas will not appear on the checkin screen.

5. Split year format	[0, 1, or 2]

This field is only used when field 2 is set to 7 or 8.

0   Date format for the year expressed in the format YYYY/YYYY (4 digits, separator, 4 digits), for example, 1989/1990

1   Date format for the year expressed in the format YYYY/YY (4 digits, separator, 2 digits), for example, 1989/90.

2   Date format for the year expressed in the format YY/YY (2 digits, separator, 2 digits), for example, 89/90.

6. Split year separator   [1 character]

This field is only used when field 2 is set to 7 or 8. Enter the character that will separate date formats for split years, for example, 89/90.

Where Used

You can assign Chronology Codes on the:

- PUBLICATION PATTERN DETAIL screen — (in the *CHRONOLOGY CODE* field).

Checkin Type (`CHKT`)

The Checkin Type allows you to assign a status to a serial item when it is checked in. For example, if a serials item has not been delivered in the expected time, your library can make a claim to the vendor. This status can be indicated on the Checkin screens with the Claimed Checkin Type code.

There are 21 Checkin Type codes; six are definable by the library. The user definable codes are numbered 15 through 20 and referred to as Optional 1 through Optional 6. Use these codes to define statuses such as *Not published*, *In process*, and so forth.

Access

Enter CHKT or the corresponding menu number to access the CHECKIN TYPE CODE table:

• Holdings Setup Menu (CHSM)

• Serials Control Code Table (CODM).

Initial screen (1 of 2)

```
                   CHECKIN TYPE CODE - (CHKT)


    Number of records : 21
    Code  Description of code
    ----  -----------------------------------------------------------
 1.  1     Received
 2.  2     Returned
 3.  3     Claimed
 4.  4     Exp issue
 5.  5     Exp index
 6.  6     Exp suppl
 7.  7     Missing
 8.  8     In Bindery
 9.  9     Bound
10.  10    No Action
11.  11    Item due
12.  12    Withdrawn
13.  13    Microfilm
14.  14    Microfiche

Options:
 ? help   # line   Print   Forward   Backward   Search jump   Exit
```

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```
                     CHECKIN TYPE CODE - (CHKT)

      Number of records : 20
      Code  Description of code
      ----  -------------------------------------------------------
  15. 15    Optional 1
  16. 16    Optional 2
  17. 17    Optional 3
  18. 18    Optional 4
  19. 19    Optional 5
  20. 20    Optional 6


Options:
  ? Help  # line   Print   Forward   Backward   Search jump   Exit
```

Detail Screen

```
                     CHECKIN TYPE CODE - (CHKT)

     : 3
     ----------------------------------------------------------------
  1. Description                                      : Claimed
  2. Suppress display in OPAC (1=YES)?                 :
  3. Treat items as 'Received' in Serials (1=YES)      :
     (Item does not need to be checked in)
  4. Treat items as Gaps in Holdings displays (1=YES)? : 0
  5. Treat items as Held in Holdings Display (1=YES)?  : 1


Options:
  ? help  # line   Line by line   Copy   Print   Exit
```

Fields

Checkin Type Code   [1, 2, 3, ... 14]

1. Description   [Text]

                             Brief description of the Checkin Type Code.

2. Suppress display in OPAC		[0 or 1]
		Determines whether items with this Checkin Type Code are displayed in the Online Catalogue. This field does not effect the display of the summary holdings statement to the OPAC user, nor the display of parts information in other modules of the system.
	0	Checkin history is displayed in the Online Catalogue.
	1	Checkin history is not displayed in the Online Catalogue (This feature might be used for the `withdrawn` status or for `next expected` status if the library does not want this information available to their OPAC users.)
		You must logoff ADVANCE after changing field 2 so that the new value can be reflected in the OPAC display.
3. Treat items as 'Received' on Checkin screen		[0 or 1]
		Determines whether items with this Checkin Type code will be regarded as *Received* when the Checkin Screen is displayed. Allows you to specify that items with status of *Received*, *In bindery*, *Bound*, and so forth, have really been received by the library. The message *Received xx/yy* on the Serial checkin screens will reflect this.
	0	Item has not been received. Displays as not received on the Checkin Screen. (The actual status may be *Item due*, *Claimed*, *Returned,* or *Missing*.)
	1	Consider this item as received by library and display as received on the Checkin Screen. (Allows you to assign an implied status of received though the actual status is *Bound*.)
4. Treat items as Gaps in Holdings displays		[0 or 1]
		Determines whether or not items with this Checkin Type Code will be treated as non-gap or gap breaks in holdings statements. Corresponds to the USMARC Holdings fields 863/4/5 $w.
		This parameter has an effect only if *Treat items as Held in Holdings Display (1=YES)?* is set to 0 (parameter 5).
	0	If 0 is specified and the item is not treated as **held** by the library, the exported MARC record containing the location's holdings will be built showing a nongap break (tag 863/4 subfield w is assigned a value *n* for a

nongap indicator). For example, a checkin type representing unpublished parts. Holdings statements will be built with a ; (semicolon – a nongap break) to indicate that this item is not held by the library.

1   If 1 is specified and the item is not treated as held by the library, the exported MARC record containing the location's holdings will be built showing a gap break (tag 863/864 subfield w is assigned a value *g* for a gap indicator). For example, a Checkin Type representing withdrawn parts. Holdings statements will be built with a , (comma – a gap break) to indicate that this item is not held by the library.

5. Treat items as Held in Holdings Display

[0 or 1]

If 0 is specified, the exported MARC record containing the location's holdings will be built showing either a nongap or gap break (tag 863/4 subfield w is assigned a value of n or g respectively). As well, summary holdings statements will display a nongap break using a ";" (semicolon) and a gap break using a "," (comma). For example:

v.1:no1(1976:Jan.)-v.1:no.4(1976:Apr.),v.1:no.6(1976:June),v.1:no.8(1976:Aug.)-v.1:no.10(1976:Oct.)

The library holds neither v.1:no.5(1976:May) nor v.1:no.7(1976:July).

Where Used

You can assign a Checkin Type Code on the Serials Control screen:

- CHECKIN FOR (SHIPTO CODE) screen—(in the *STATUS* field).

Physical Format Code (`PHYS`)

The Physical Format Code is used in the Location Copy record to identify the type of the material (physical characteristics) of the item. This code provides a means of differentiating multiple formats. For example, you might have multiple subscriptions to *National Geographic*, all in different physical forms, such as, paper, microfiche, and electronic.

Physical format is defined in the USMARC 007 field, positions 1 and 2.

Access

Select Physical Format Code (PHYS) from the Holding Setup Menu.

```
                  PHYSICAL FORMAT CODE - (PHYS)

    Number of records : 77
    Code    Description of code
    ------  ----------------------------------------------------------
 1. ad      Atlas
 2. ag      Diagram
 3. aj      Map
 4. ak      Profile
 5. aq      Model
 6. ar      Remote-sensing image
 7. as      Section
 8. ay      View
 9. az      Other
10. ca      Tape cartridge
11. cb      Chip cartridge
12. cc      Computer optical disc cartridge
13. cf      Tape cassette
14. ch      Tape reel

Options:
 ? help    Add item   # line   Print   Forward   Backward   Search jump
 Exit
```

Use the *Add item* option to create a new code or use the *# line* option to edit an existing code. The detail screen appears.

```
                    PHYSICAL FORMAT CODE - (PHYS)

        : he
     ------------------------------------------------------------------
  1. Description          : Microfiche




  Options:
   ? help   # line   Line by line   Copy   Print   Delete   Exit
```

1. Description   [46+ characters]

Enter a description of the code. (Only the code is displayed on the Location Copy Detail screen.)

Where Used

You can assign a Physical Format Code on the:

- LOCATION COPY DETAIL screen – (in the *Physical Format* field).

- LOCATION COPY MARC EDIT MARC DISPLAY screen – (in the 007 field).

Claim Message Codes (`CLMSG`)

You can assign a Claim Message Code to a serial item. The code enables a stored message to be printed on the claim letter. This letter is used by the library to make claims on serial items that were not received or were received damaged.

Access

Enter CLMSG or the corresponding menu number to access the CLAIM MESSAGE CODES table from the:

• Holdings Setup Menu (CHSM)

• Serials Control Code Table (CODM).

Initial screen

```
                    CLAIM MESSAGE CODES


      Number of records : 2
      Code   Description of code
      ----   ----------------------------------------------------------
   1. DAMG    Item received damaged
   2. INC     Item received incomplete


 Options:
   ? help   Add item   # line   Print   Forward   Backward   Search jump
   Exit
```

Detail Screen

```
                    CLAIM MESSAGE CODES

        : DAMG
      ----------------------------------------------------------
   1. Description          : Item received damaged
   2. Message              : THIS ITEM WAS RECEIVED DAMAGED.


 Options:
   ? help   # line   Line by line   Copy   Print   Delete   Exit
```

Fields

Claim Message Code   [1-4 character code]

1. Description   [Text]

Brief description of the Claim Message Code.

2. Message   [Text]

The message to be printed. Up to 195 characters can be printed on the standard claim letter.

Where Used

You can assign a Claim Message Code on the Serials Control screen:

• CLAIM DETAILED DISPLAY — (in the *MESSAGE* field).

Common Table   This table is common to both the Serials and Acquisitions Modules. Care should be taken when making changes to this table, because changes can affect both modules.

Claim Cycle Codes (`CLMCD`)

Assigning a Claim Cycle Code to a vendor or to a copy set (subscription) allows you to create an automatic claim cycle based on the periods specified in the table.

You can assign Claim Cycle Codes to purchase orders or serial copy sets and default cycle codes to vendors. The system-generated action dates can also be overridden. The *Allow system to autogenerate claims* field in the FISCAL PROFILE table determines whether the system generates claim letters or just reports the need for a letter (in verification reports).

Access

Enter CLMCD or the corresponding menu number to access the CLAIM CODES table from the:

- Holdings Setup Menu (CHSM)

- Serials Control Code Table (CODM).

Initial screen

```
                   CLAIM CODES
     Number of records : 3
     Code  Description of code
     --  ----------------------------------------------------------------
  1. DEF    Default Claim Cycle
  2. FAST   Fast Claim Cycle
  3. SLOW   Slow Claim Cycle

Options:
  ? help   Add item  # line   Print   Forward   Backward   Search Jump
  Exit
```

Detail Screen

```
                           CLAIM CODES
        : DEF
        -------------------------------------------------------------
    1. Description                    : Default Claim Cycle
    2. Claim 1 (# days)               : 0
    3. Claim 2 (# days)               : 15
    4. Claim 3 (# days)               : 0
    5. Claim 4 (# days)               : 0
    6. Cancel  (# days)               : 7

  Options:
    ? help   # line   Line by line   Copy   Print   Delete   Exit
```

Common Table   This table is common to both the Serials and Acquisitions Modules.
Care should be taken when making changes to this table, because
changes can affect both modules.

For serial items, *Claim 1* is not used. Instead, the *CLAIM DELAY* defined
on the PUBLICATION PATTERN PREDICTIONS screen is added to the
expected receipt date and this becomes the estimated delivery date. If the
issue is not received by the estimated delivery date, a claim (the first
claim) should be initiated. When the first claim is created, it is given an
action date. The action date on a claim is the date by which you want a
response from the vendor (i.e. either shipment of materials, notification
of order or a new expected date for delivery). The *ACTION DATE* on the
first claim is set to 15 days from the date the claim is created.

If the claim is still outstanding when the action date comes around, the
system will reissue the claim to the vendor and wait an additional 7 days
before an issue has its status set to `missing`.

Fields

Claim Code   [1-6 character code]

1. Description   [Text]

Brief description of the Claim Code.

2. Claim 1 (# days)	[Numeric]

This field has **no effect on serials claiming**. It is only used for claiming monographs in Acquisitions.

The system uses the value of *CLAIM DELAY* field on each serials PUBLI-CATION PATTERN screen (PUBM), in place of the *Claim 1* value. For example, a first claim should be generated (or the need for one should be reported) 'claim delay' days after the expected date.

3. Claim 2 (# days)	[Numeric]

The number of days after the first claim date that the system should generate another claim letter or report the need for one.

When the first claim transaction is generated, the system will add this number of days to the current date to determine a default claims *ACTION DATE*, which is shown on some Serials Control screens.

4. Claim 3 (# days)	[Numeric]

The number of days after the second claim date that the system should generate another claim letter or report the need for one.

5. Claim 4 (# days)	[Numeric]

The number of days after the third claim date that the system should generate another claim letter or report the need for one.

6. Cancel (# days)	[Numeric]

The number of days after the final claim date that the system should mark the copy as missing and generate a missing copy report.

You may leave any of these fields empty, including intermediate periods in the cycle; you do not need to use all four claims before the issue is marked as missing. If the field 6 (*Cancel (# days)*) is left empty, the system will not mark the issue as missing at the end of the claim cycle.

Where Used

You can assign Claim Cycle Codes on the Serials Control screens:

- VENDOR HEADER SCREEN — (in the *CLAIM CODE* field).

- SERIAL COPY SET DETAIL screen — (in the *CLM CODE* field).

Ship To Code (SHPTO)

Ship To Codes store full addresses, phone numbers, and related information for future retrieval. You can use this information to print shipping information on serial orders, claims, and cancellation letters and to drop-ship items to various locations. These codes facilitate decentralized receiving of serials items.

Access

Enter SHPTO or the corresponding menu number to access the SHIP TO CODES table from the:

• Holdings Setup Menu (CHSM)

• Serials Control Code Table (CODM).

Initial screen

```
                 SHIP TO CODES

   Number of records : 3
   Code    Description of code
   ----    ------------------------------------------------------------
1. CENT    Central Library - Serials Control Dept.
2. FAIR    Fairway Public Library
3. MED     Medical Institute of Technology - Serials Control Dept.


Options:
  ? help   Add item   # line   Print   Forward   Backward   Search Jump
  Exit
```

Detail Screen

```
                    SHIP TO CODES

     : CENT
    ----------------------------------------------------------------------
1. Name                        : Central Library - Serials Control Dept.
2. Address 1                   : 123 First Street
3. Address 2                   : P.O. Box 1233
4. Address 3                   :
5. City, Prov/State, Postal/ZIP: New York, New York, 14616
6. Contact/Attention           : THE LIBRARIAN
7. Phone                       : (703) 123-1233
8. SAN                         : 1232143
9. Exchange Partner (1 = yes)  : 0


Options:
   ? help   # line   Line by line   Copy   Print   Delete   Exit
```

Fields

Ship To Code   [1-6 character code]

1. Name   [Text]

                    Brief description of the Ship To Code.

2. Address 1   [Text]

                    First line of the shipping address.

3. Address 2   [Text]

                    Second line of the shipping address.

4. Address 3   [Text]

                    Third line of the shipping address.

5. City, Prov/State,   [Text]
Postal/ZIP
                    Final line of the shipping address where the city, province or state,
                    country, and postal or zip code should be entered (separated by ' ,').

6. Contact/Attention	[Text]
	Library contact person for shipped materials.
7. Phone	[Text]
	Phone number of the library contact person.
8. SAN	[Text]
	Standard Address Number of this library address.
9. Exchange Partner	[`0-1` as defined below]
`0` or empty	This Ship To Code does **not** describe an exchange partner.
`1`	This Ship To Code describes an exchange partner. You can assign this code when the library sends material to the partner, or when the library has a vendor send material directly to the partner.

You may leave any of these fields empty, including lines at the end of the shipping address.

Where Used

You can assign Ship To Codes on the Serials Control screens:

- VENDOR NOTES —(in the *SHPTO* field).
- SERIAL COPY SET DETAIL —(in the *SHPTO* field).

Common Table   This table is common to both the Serials and Acquisitions Modules. Care should be taken when making changes to this table, because changes can affect both modules.

Numbering Codes (NUMB)

The Numbering Codes determine whether enumeration numbering sequences restart or run continuously. Deciding which code to assign is based on the requirements of the serial item's enumeration terms.

Enter NUMB or the corresponding menu number to access the NUMBERING CODE table from the:

- Holdings Setup Menu (CHSM)

- Serials Control Code Table (CODM).

Initial screen

```
                    NUMBERING CODE - (NUMB)

     Number of records : 2
     Code   Description of code
     ----   -------------------------------------------------------------
  1. C      Continuous Numbering
  2. R      Restart Numbering




Options:
  ? Help    Add item   # line   Print   Forward   Backward   Search jump
  Exit
```

Detail Screen

```
                        NUMBERING CODE - (NUMB)

        : C
     ------------------------------------------------------------------
   1. Description      : Continuous Numbering
   2. Type             : 0
     0 - Continuous
     1 - Restart







   Options:
     ? Help   # line   Line by line   Copy   Print   Delete   Exit   File
```

Fields

Numbering Code   [1-3 character code]

1. Description   [Text]

                        Brief description of the Numbering Code.

2. Type   [1 digit]

                        Enter one of the numeric codes shown on the screen. These codes corre-
                        spond to the two types of numbering codes: continuous and restart /
                        reset.

Where Used

                        You can assign Numbering Codes on the:

                        • PUBLICATION PATTERN DETAIL — (in the *Numbering Code* field).

Publication Regularity (`PREG`)

Publication Regularity codes enable the system to predict a serial item's publication dates.

Access

Enter `PREG` or the corresponding menu number to access the PUBLICATION REGULARITY CODE table from the:

- Holdings Setup Menu (`CHSM`)

- Serials Control Code Table (`CODM`).

Initial screen

```
              PUBLICATION REGULARITY CODE - (PREG)

     Number of records: 5
     Code           Description of code
     -------------  -------------------------------------------------
  1. D              Daily
  2. E              Erratic
  3. M              Months
  4. S              Seasons
  5. U              Monthly (by user)




 Options:
  ? help   Add item   # line   Print   Forward   Backward   Search jump
  Exit
```

Detail Screen

```
                    PUBLICATION REGULARITY CODE - (PREG)

       : D
     ----------------------------------------------------------------------
 1. Description      : Daily
 2. Type             : 0
    0 - Days
    1 - Seasons
    2 - Months
    3 - Erratic
    4 - Monthly (defined by user)



 Options:
  ? help   # line   Line by line   Copy   Print   Delete   Exit
```

Fields

Publication Regularity Code   [1 character code]

1. Description   [Text]

Brief description of the Publication Regularity Code.

2. Type   [1 digit]

Enter one of the numeric codes shown on the screen. These codes correspond to the five types of regularity codes: day/week based, seasonal, month/year based, irregular (erratic), and monthly (defined by user). The monthly choice allows you to define the exact dates when an issue is expected.

Where Used

You can assign Publication Regularity Codes on the:

- PUBLICATION PATTERN DETAIL —(in the *REGULARITY PATTERN* field).

Publication Regularity Labels (`PREGL`)

From this table you can specify the display labels that define the number of issues published in each chronological period, such as a month or a week. This table facilitates translating publication regularity labels to another language.

Access

Enter PREGL or the corresponding menu number to access the VALID REGULARITY PATTERN LABELS table from the:

• Holdings Setup Menu (CHSM)

• Serials Control Code Table (CODM).

Initial screen

```
                    VALID REGULARITY PATTERN LABELS


        : PUB.REG.DFLT
      -----------------------------------------------------------------
   1. Valid labels for Monthly/Seasonal pattern: JA,FE,MR,AP,MA,JN,JL,AU,SE,+
   2. Valid labels for Daily pattern            : SU,MO,TU,WE,TH,FR,SA




  Options:
    ? Help   # line   Line by line   Print   Exit   File
```

Detail Screen   Not required.

Fields

PUB.REG.DFLT   [Text]

Name of the file containing the labels.

1. Valid labels for Monthly/Seasonal pattern

[Text]

Enter 12 labels for a monthly or seasonal regularity pattern. Labels should be 2 characters long and separated by commas. The commas will not appear where these labels are used. The following are examples of a monthly regularity pattern:

```
JA,FE,MR,AP,MA,JN,JL,AU,SE,+
```

2. Valid labels for Daily pattern

[Text]

Enter 7 labels for a daily regularity pattern. Labels should be 2 characters long and separated by commas. The commas will not appear where these labels are used. The following are examples of a daily regularity pattern:

```
SU,MO,TU,WE,TH,FR,SA
```

Where Used

The system displays Valid Regularity Pattern Labels on the:

- PUBLICATION PATTERN DETAIL screen — The labels are used in the *REGULARITY PATTERN* field.

5

Cataloguing Functions

Access To Workfile Records

Access to workfile records is configured separately for each user. This controls whether or not users can retrieve and file records with identification codes other than their own.

Identification codes are the user codes entered by the library in *Enter Access Codes* (`EACC`) from the MASTER MENU.

There may be identification codes entered in *Fiscal Profile* (`FISCL`) for records modified in Acquisitions after being transferred to cataloguing.

There may also be source codes from indexation profiles *Bibliographic* and *Authority Index MARC Records* (`UBIX` and `UAIX`). These are used to give the source of records loaded from external databases.

All these source codes must be defined as user codes in *Enter Access Codes* (`EACC`) in order for their records to be retrievable.

The following table shows where to retrieve the workfile record and where access to these records is given.

Workfile Access

Access Given In	Retrievable In
Workfile Browse Delimiter (BWBD)	Bibliographic Workfile Cataloguing (BWC)
Workfile Browse Delimiter (AWBD)	Authority Workfile Cataloguing (AWC)
Deleted Records Workfile Browse Delimiter (BDBD)	Bibliographic Deleted Workfile Records (BWDR)
Deleted Records Workfile Browse Delimiter (ADBD)	Authority Deleted Workfile Records (AWDR)
Indexing Errors Workfile Browse Delimiter (BEBD)	Indexing Errors Workfile Records (BWIE)
Indexing Errors Workfile Browse Delimiter (AEBD)	Authority Workfile Cataloguing (ACW)
Discarded Acquisitions Records Browse Delimiter (BDAD)	Used only by the system. Cannot be accessed by users.

Access to Records

Use this procedure to provide access to records in all of the functions:

1. On entering one of these functions, the system prompts:

   ```
   Identification Code
   ```

2. Enter the user code in uppercase.

   The list of source codes available to this user is displayed.

3. Add a new code by entering A, and then the source code to be added.

4. FILE or quit with EXIT.

Record Status Codes

Record status codes are configured in the *Bibliographic Status Codes* (BSC) function for bibliographic records and *Authority Status Codes* (ASC) for authority records.

```
                    CATALOGUING STATUS CODES


     Enter Cataloguing Status: 4


     1) Description        : Delete from Main Database

     2) Status Groups      : 4

     3) Minimum access level : 4



Status Group Description:

    1  Index into Work File.          4  Deindex from Main Database.
    2  Deindex from Work File.        7  Delete Tags  /  Subfields
    3  Index into Main Database.


Options:
  ? INFO   # line   Line by line   File   Exit
```

Description   The code heading which displays when the list of codes is consulted during cataloguing.

Status Group   This code indicates what happens to records with this status (one or more codes, taken from the standard list of statuses displayed at the bottom of the screen).

Minimum Access Level   Level that the user must have in cataloguing in order to use this status. User levels are entered in the *Enter Access Codes* (EACC) function.

                           If the user's access level for the module, e.g., Cataloguing (defined in EACC) is less than the value entered in the *Minimum Access Level*, the user will not be able to perform certain activities. That is, some user's

will be allowed to file records only into a workfile while others will be able to file records into both the main database and workfile.

The `Description` and `Access level` fields can be modified.

To modify a field, enter a line number and type the new data over the old.

`FILE` or quit with `EXIT`.

Transaction Logs

Bibliographic and Authority Transaction logs are controlled by Action Logging (CSAL) on the CATALOGUING SET-UP MENU. This function controls the data that appears in the transaction log. The logs keeps a history of the transactions that can be reviewed by accessing them through Cataloguing Reports (CCR) from the Cataloguing Reporting Menu (CRM).

```
               CATALOGUING TRACKING REPORTS


      : CAT.REPORTS
     --------------------------------------------------------------------
 1. Log bibliographic record additions               (1 = Yes): 1
 2. Log bibliographic record deletions               (1 = Yes): 1
 3. Log bibliographic record changes                 (1 = Yes): 1
 4. Log bibliographic record merges                  (1 = Yes): 1
 5. Log authority record additions                   (1 = Yes): 1
 6. Log authority record deletions                   (1 = Yes): 1
 7. Log authority record changes                     (1 = Yes): 1
 8. Log authority record merges                      (1 = Yes): 1
 9. Report new authorities from bibliographic        (1 = Yes): 1
10. Report new authorities from authority            (1 = Yes): 1
11. Report bibliographic conflicts with see references  (1 = Yes: 1
12. Flip bibliographic conflicts to the preferred form  (1 = Yes): 0



Options:
 ? help   # line   Line by line   Print   Exit
```

Bibliographic Transaction Logs

The fields that log changes in bibliographic records are:

```
1. Log bibliographic record additions
2. Log bibliographic record deletions
3. Log bibliographic record changes
4. Log bibliographic record merges
```

Enter 1 to log changes; enter 0 to ignore the changes in bibliographic records.

See the reports:

• Brief listing of bibliographic edit log, Report 255 and

• Bibliographic Edit Log, Report 256

to view individual transactions. These reports can be accessed by selecting *Bibliographic Cataloguing Edit Logs* on the CATALOGUE REPORTS MENU.

Authority Transaction Logs

The fields that log changes in authority records are:

```
5.   Log authority record additions
6.   Log authority record deletions
7.   Log authority record changes
8.   Log authority record merges
9.   Report new authorities from bibliographic
10. Report new authorities from authority
11. Report bibliographic conflicts with see references
```

Enter 1 to log changes; enter 0 to ignore the changes in authority records.

See the reports:

- Brief Listing of Authority Edit Log, Report 253, which is available from the Authority Cataloguing Edit Logs on the CATALOGUE REPORTS MENU. Reports authority record additions, deletions, changes and merges.

- Authority Edit Log, Report 254, which is available from the Authority Cataloguing Edit Logs on the CATALOGUE REPORTS MENU. Reports authority record additions, deletions, changes and merges.

- Authority 4XX Link Report, Report 257, which is available from the Authority Database Maintenance on the CATALOGUE REPORTS MENU. This report lists bibliographic conflicts with See references.

- Authority Action Report, Report 259, which is available from the Authority Database Maintenance on the CATALOGUE REPORTS MENU. Reports new conflicting and merged authorities.

Controlling Conflicting Authorities

The field:

```
12. Flip bibliographic conflicts to the preferred form
```

when set to 1 means that when a record is loaded that contains an established form that already exists in the database as a rejected form, the established form of the loaded record will be switched to the accepted form. For example, the following authority record exists in the database:

150 (250) Bicycle (accepted form)
450 Bike (rejected form)

A record is loaded which contains *Bike* as an established form. In this case, *Bike* will automatically be switched in the loaded recorded to *Bicycle*.

When this field is set to 0, records loaded into the system are not modified.

Importing and Exporting Records Configuration

Transaction Codes   Transaction codes are controlled in the *MARC Transaction Codes* (MTC) function.

On entering this function the list of existing transactions codes is displayed.

Transaction codes are made up of two characters in hexadecimal format.

1. To add a new code, use the command A.

2. Enter the code in hexadecimal format.

3. Enter the description (maximum 49 characters) which will display in the field *Transaction type* when a record is consulted in MARC.

4. To modify an existing code, enter its line number.

5. FILE or quit with EXIT.

Field Deletion Codes   Deletion codes for tags and subfields are defined in the *Tag/Subfield Deletion Codes* (CSMDC) function.

On entering this function the list of existing codes is displayed.To add a new code, use the command A. Enter the code to be added.

```
                     TAGS & SUBFIELDS DELETION


    TAG & SUBFIELD DELETION CODE : *OCLC.AUTH.DUMP
    --------------------------------------------------------------------
1. Description              : OCLC authority record downloading
2. Tags/Subfields to Delete :


     eg: 730,860ef,862a,970




Options:
   ? = ? help          # = # line          L = Line by line
  CO = Copy         PRT = Print            E = Exit
```

Description	This description will display when the list of codes is consulted in *Bibliographic Index MARC Record*s (UBIX) or *Authority Index MARC Record*s (ABIX).
Tags/subfields to delete	Enter the tags or subfields to delete in the MARC format order. If an entire tag must be deleted, enter the tag. If only one or more subfields is to be deleted, enter the tag, followed by the subfield codes. Separate tags with commas but without spaces.
	For example: to delete tag 300, subfield c of tag 510 and subfields f and h of 620, enter: 300,510c,620fh
	Subfields whose codes are numbers should be preceded by an X. For example, to delete subfield 3 of tag 410, enter 410X3.
	FILE or quit with EXIT.
To modify an Existing Code	Retrieve the code to be modified by entering its line number. Then, enter the field to be modified by typing its line number and enter the new data over the old.
	FILE or quit with EXIT.

Item Configuration

Duplicate Call Numbers

When a call number that already exists in the database is entered through the function item cataloguing, a warning message appears indicating that a duplicate call number has been entered.

The *Call # Duplicate - Exclusion Class Range* (CDC) function is used to control sections of the system for which there will be no duplicate checking. Intervals of classifications are entered. Call numbers within the interval will not be tested.

NOTE: Call number ranges are **CASE SENSITIVE**. Entering the range **A-b excludes all** shelfmarks from duplicate checking.

```
              CLASSES TO BE IGNORED ENTRY SCREEN


CLASSES ENTERED :

    AB001-AB200; AG700-AG799; AZ10-AZ20; CC300-CC400; F-FICT; FE200-FE299;
    LL-LM; TK7000-TK7999; TL-TL9999; Z1003-Z1004






1) Beginning Class:

   Ending Class   :


Options:
  ? = ? help   # = # line  FI = File    E = Exit
```

- To create a classification interval:

    1) To enter an interval, type 1.

    2) Enter the *beginning class* of an interval, for example, AB001 or 510.

    3) The cursor will then jump to the *ending class* field.

4) Enter the last class, for example `AB200` or `560`.

- Modifying a classification interval:

    1) To modify an interval, type `1`.

    2) Enter the *beginning class* of the interval, and its ending will be displayed in the *ending class* field.

    3) Modify one or the other.

- Deleting a class interval:

    1) To delete an interval, type `1`.

    2) Enter the *beginning class* of the interval, and its ending will be displayed in the *ending class* field.

    3) Enter **#** in the *beginning class* filed, and <ENTER>.

`FILE` or quit with `EXIT`.

Spine Labels

The *Call Number Spine Label* (CHCSL) function defines the format and contents of the spine labels, pocket labels, and card labels. These labels can be printed in the holdings cataloguing functions (*Edit Holdings Information* [CEHI] in cataloguing, or *Edit Holdings* [CEH] in circulation). Several label formats can be defined. The choice of format is made during printing.

The function can also define **Serial Checkin labels** that can be printed at the time of checkin from the ADVANCE Holdings Client.

On entering *Call Number Spine Label* (CHCSL), the list of existing formats appears.

```
CALL NUMBER SPINE LABEL

     Number of records : 4
     Code           Description of code
     -------------  -------------------------------------------------
  1. DEFAULT        Original default
  2. SERIAL         Serial
  3. SPINE          Spine Label only
  4. SPINEPOCKET    Spine and Pocket only




Options:
 ? help   Add item   # line   Print   Forward   Backward   Search jump
 Exit
```

Creating a Format Code

To add a new format, type A. Enter a code (maximum 20 characters).

Complete the fields as follows. For fields requiring a yes/no answer, enter 1 for yes, or 0 for no.

```
                 CALL NUMBER SPINE LABEL

   CALL NUMBER SPINE LABEL CODE : SPINEPOCKET
   ------------------------------------------------------( Page 1 of 2 )
 1. Description                             : Spine and Pocket only
 2. Left Margin                             : 3
 3. Spine Width                             : 14
 4. Break Width                             : 12
 5. Include Sublocation (1 = Yes)           : 1
 6. Include Prefixes (1 = Yes)              : 1
 7. Include Suffix (1 = Yes)                : 1
 8. Include Label & Numeration (1 = Yes)    : 1
 9. Standard Call Number Breaking (1 = Yes) : 1
10. New Line Characters (use . to separate) :
11. Specify Order (eg. 1,2 or 2,3,1)        : 1,2,3
12. Pocket/Card ? (1 = Pocket, 2 = Pocket&Card): 1
13. Label Height (Spine label,Card label)   : 10,10
14. Pocket Width                            : 40
15. Pocket Spacing                          : 2
16. Printer (Dn or n)                       : 1
Options:
 Forward   ? help   # line   Line by line   Copy   Print   Delete   Exit
```

1. Description	Name of format.
2. Left Margin	Spine label indent. For example, if *Left Margin* = 3, the printed spine label begins in column 4.
3. Spine Width	Pocket label (and card label) indent, including the blank column always left between spine and pocket. For example, if *Left Margin* = 3 and *Spine Width* = 14, then columns 4-16 are reserved for the spine label (13 character width), column 17 is left blank, and the pocket and card labels begin in column 18.
4. Break Width	Printable width of the spine label. For example, if the *Break Width* = 7 and a piece of text is 10 characters long, then 7 characters are printed on one line and the remaining 3 on the next. The Break Width is indicated by + signs framing the formatted data on the CALL NUMBER SPINE LABEL FORMATTER & MODIFIER screen.
5. Include Sublocation	Yes/no to include the holdings record's Sublocation Code on the labels.
6. Include Prefixes	Yes/no to include the holdings record's Call# Prefix on the labels.

7. Include Suffix	Yes/no to include the holdings record's Call# Suffix on the labels.
8. Include Label & Numeration	Yes/no to include the holdings record's Volume\Part# on the labels.
9. Standard Call Number Breaking	Yes/no to use standard rules for breaking lines of text on the spine labels. If you answer no, the custom rules you specify in the *Specify Order* field will be used instead.

In either case, the system afterward breaks on the strings or characters you specify in the *New Line Characters* field and on the spine label width you specify in the *Break Width* field.

Standard Rules If you answer 1, the system will:

1. Break the entire spine label data on its attributes and values:

   - Bldg/subloc (Sublocation Code) — optional, see the *Include Sublocation* field

   - Collection (Collection Code)

   - Call# Prefix — optional, see the *Include Prefixes* field

     – 1st prefix

     – 2nd prefix

     – 3rd prefix

     – and so on

   - Call Number

     – Class

     – Cutter

     – Accession

   - Volume\Part# — optional, see the *Include Label & Numeration* field

     – 1st Label/Description and Numeration

     – 2ndLabel/Description and Numeration

     – 3rdLabel/Description and Numeration

     – and so on

   - Copy Number

- Call# Suffix — optional, see the *Include Suffix* field

2. Break the Call Number data. Every character that fits any of the following four conditions will print on a new line. Break points are represented by **^** signs in the examples.

- digit preceded by a letter; for example, "A3" becomes "A**^**3"

- period followed by a letter; for example, ".A" becomes "**^**.A"

- letter preceded by a space; for example, " A" becomes " **^**A"

- digit preceded by a space; for example, " 3" becomes " **^**3"

10. New Line Characters

Special strings or single characters within Call Numbers that you want used as non-printing break characters. Use periods to separate break strings in this specification. For example, specify ! for a line break on each exclamation mark in the call number. The New Line Characters will cause breaks regardless of what is in the *Standard Call Number Breaking* and *Specify Order* fields.

11. Specify Order

If you do not want the standard line-breaking rules for spine labels used, or answer no in the *Standard Call Number Breaking* field, then you can specify custom rules in this field. The available rules are numbered as follows:

- 1 = break on a period

- 2 = break on a digit following a letter

- 3 = break on a letter or digit following a space

Specify as many of these rules as you need, as many times as necessary, and specify them in reverse sequence. The system applies the first rule, starting at the end of the spine label text and checking backwards, then applies the next rule to the remaining text, and so on until it runs out of rules or text.

For example, specify 3,1,2,3 to have CAM2 PQ2057.E5 c.2 become CAM2**^**PQ**^**2057**^**.E5**^**c.2, but specify 3,1,3 to have it become CAM2**^**PQ2057**^**.E5**^**c.2.

12. Pocket/Card

Answer 0 = spine labels only, 1 = spine and pocket labels, 2 = spine, pocket, and card labels.

The information printed on spine labels is listed in the description of the *Standard Call Number Breaking* field.

Pocket and card labels have one line each of:

- spine label information

- Author

- Title

13. Label Height

Minimum height of labels; that is, number of lines. Specify a second number if you want card labels to have a different height than spine and pocket labels. For example, specify 8 , 5 for 8-line spine and pocket labels but 5-line card labels.

CAUTION: If a particular item's spine label data requires more lines than you specify here, the height specification is ignored. The system prints the complete spine label, then a blank line, and then the next label (either a card label or the next item's set of labels).

14. Pocket Width

Width of pocket and card labels (number of characters). Text longer than this is truncated.

15. Pocket Spacing

Enter 1 to print text single-spaced on pocket and card labels, or 2 for double-spaced text.

16. Printer

Print queue number. If the printer served by the queue can print diacritics, use a D in front of the number, for example, D7.

NOTE: To permit label printing from a particular terminal, define the terminal's port as having an auxiliary printer. See the *Utilities Management Guide*.

Page 2

Page 2 of the table is used only for defining **Serial Checkin labels**, which can be printed at the time of checkin from the ADVANCE Holdings Client. Be sure to also define fields 1, 2, 3, 5, 6, 7, and 8 on page 1 for these labels – the other page 1 fields have no effect.

This label information is printed on up to five lines, as determined by the table fields indicated below:

- Location information line: sublocation *(page 1 field 5)*, call# prefix *(page 1 field 6)*, call number *(page 2 field 4)*, call# suffix *(page 1 field 7)*, copy number *(page 2 field 4)*

- Author *(page 2 field 2)*

- Title *(page 2 field 3)*

- Enumeration/chronology *(page 1 field 8)*

- Checkin date *(page 2 field 5)*

```
                    CALL NUMBER SPINE LABEL

     CALL NUMBER SPINE LABEL CODE : SPINEPOCKET
     ----------------------------------------------------( Page 2 of 2 )
      *** ONLY USED BY HOLDINGS CLIENT ***
      Serial Checkin label definition
      Uses fields 2, 3, 5, 6, 7, 8 from Page 1
 1. Print serial checkin label only (1 = Yes)       :
 2. Include Author (1 = Yes)                         :
 3. Include Title (1 = Yes)                          :
 4. Include Call number (1 = Yes)                    :
 5. Include checkin date (1 = Yes)                   :
 6. Checkin label height                             :




 Options:
  Backward   ? help   # line   Line by line   Copy   Print   Delete   Exit
```

1. Print serial checkin label only	Yes (1) to use the label definition for Serial Checkin labels only, or No (0) to use the label definition for another type of label only.
2. Include Author	Yes/no to include the bibliographic record's author on Serial Checkin labels.
3. Include Title	Yes/no to include the bibliographic record's title on Serial Checkin labels.

4. Include Call number	Yes/no to include the call number and copy number on Serial Checkin labels.
5. Include checkin date	Yes/no to include the issue checkin date on Serial Checkin labels.
6. Checkin label height	Vertical spacing: total number of lines per Serial Checkin label.

Conversion-on-the-Fly

The conversion-on-the-fly screen (DCF) defines cataloguing tables that can be used during express cataloguing.

For each table, the conversion table determines which MARC fields will be stored in the conversion-on-the-fly template.

Creating a New Table

Enter the MARC Format Code for the table at the *Enter Format Type* field on the DEFINE CONVERSION ON THE FLY SCREEN.

The DEFINE CONVERSION ON THE FLY TAG & SUBFIELDS screen then displays.

```
            DEFINE CONVERSION ON THE FLY TAG & SUBFIELDS


          Table name : BK

   1) Tag       : 245              4) Display label : Title (no init. articl)

   2) Indicator : 10

   3) Subfield  : a

   Long tag description : TITLE STATEMENT

   Valid subfields      : a,b,c,h,n,p

   First indicator      : 01
 Second indicator       : 0123456789


   Options:
     ? = ? help        # = # line        L = Line by line  FI = File
     E = Exit
```

Table Name

The table's MARC Format Code, specified on the DEFINE CONVERSION ON THE FLY SCREEN.

1) Tag

MARC tag in which the data will be stored (enter tags such as 001 or 020, without the preceding zeroes).

2) Indicator	Indicators for the tag. Indicators are assigned automatically from this table. They will not be entered during express cataloguing. Enter the indicators without spaces or punctuation.
3) Subfield	Enter the subfield of the tag.
4) Display label	The heading which will be displayed during express cataloguing.

File the template.

The DEFINE CONVERSION ON THE FLY SCREEN displays. The heading of the field just defined is displayed and numbered 1.

To define a second field, use the A.n command (where n is the number of the field to add. A copy of the configuration of the field just defined will be displayed. Modify them as required for the second field. This second field can be either an additional subfield or a completely new tag.

FILE or quit with EXIT.

Modifying an Existing Table

When a table code is already defined for conversion-on-the-fly, the list of existing fields is displayed.

To modify a field, enter its line number. Modify it as needed.

To delete a field, use the command D.n where n is the line number of the field to be deleted.

To add a field, use the command A.n.

To delete a table, use the command Delete.

6

Cataloguing Management

Cataloguing management centres around three areas:

- creating the database

- maintaining the consistency and coherence of the database

- using the database

Management involves the following tasks:

- managing the cataloguing processor (using the functions *Cataloguing Processor* [PCP], and Cataloguing Processor Control [CPC]).

- managing bibliographic records in the workfile (using functions *Bibliographic Work File Cataloguing* [BWC], *Bibliographic Deleted Records* [BWDR], *Bibliographic Indexing Errors Records* [BWIE] and *Bibliographic Discarded Acquisitions Records* [BWHR]).

- managing authority records in the workfile (using functions *Authority Work File Cataloguing* [AWC], *Authority Deleted Records* [AWDR], *Authority Indexing Errors Records* [AWIE] and *Authority Discarded Acquisitions Records* [AWHR]).

- detecting discrepancies and inconsistencies in the catalogue. Clean-up uses *Cataloguing Reports* (CCR), to discover doubles and blind authorities, and *Bibliographic MARC Cataloguing* [BMC] or *Authority MARC Cataloguing* [AMC]) to merge or delete them.

- importing bibliographic and authority records from outside sources (using functions *(Bibliographic Import Standard MARC* [UBII], *Bibliographic Index MARC* [UBIX], and *Authority Import Standard MARC* [UAII], *Authority Index MARC* [UAIX]).

• exporting records from the database (using *Authority & Biblio-graphic Exporting* [UABE]).

Some of these tasks require the use of Cataloguing reports (CCR). These reports are described in conjunction with the task they are used for rather than in a separate chapter.

Cataloguing Management

This diagram shows the cataloguing functions and their relationship to the database.
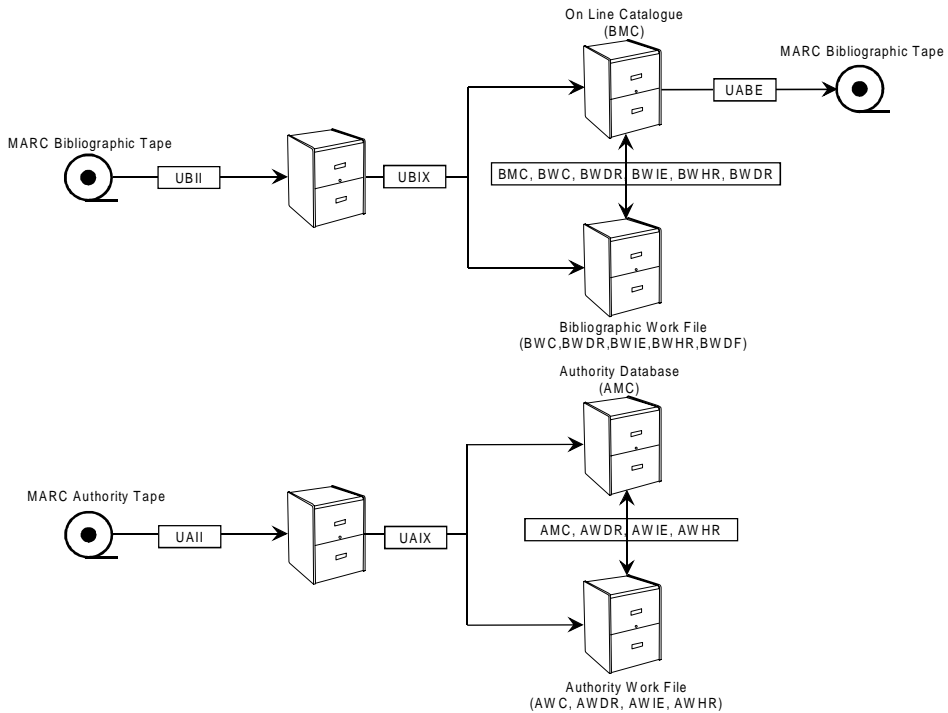
FIGURE 6.1   ADVANCE Database

Cataloguing Processor

Each time a record is filed there is a brief period during which the screen is blocked as the record is indexed. The purpose of the cataloguing processor is to eliminate this pause by indexing records in a batch while immediately releasing the screen for use.

When the cataloguing processor is active, filed records are stored in a temporary area until they are indexed. This frees the terminal immediately allowing work to continue without a pause. The records in the temporary area are then indexed by a phantom processor. The phantom processor does not require a physical port.

When the cataloguing processor is active, new records or modifications to existing records are not immediately made in the catalogue after they are filed. They will only be visible once the processor indexes them.

Records can be indexed with or without using the cataloguing processor. The advantage in using the processor is the increase in response time in filing cataloguing records. The processor can be activated during periods of intense cataloguing and de-activated in slower periods.

Importing Records

Bibliographic and authority records can be imported into ADVANCE. The records must be in the same MARC format as the system into which they are being imported (LCMARC or UNIMARC), and must conform to the *Bibliographic Information Interchange*, ISO standard 2709.

Records can come from a magnetic tape and can be copied into the computer used by ADVANCE.

Alternatively, records can be loaded from a PC file created from an on-line network, from diskettes or a CD-ROM. In this case, the records will have to be transferred to a temporary ADVANCE file using transfer software which is not part of the standard ADVANCE system.

There are two steps to importing records:

• Loading the records into ADVANCE (using *Bibliographic Import Standard MARC* [UBII] for bibliographic records and *Authority Import Standard MARC* [UAII] for authority records).

• Indexing the records (using *Bibliographic Index MARC* [UBIX] for bibliographic records and *Authority Index MARC* [UAIX] for authority records).

Loading can be done either from a magnetic tape or a file. Loading modifies the format of the records from ISO 2709 to the ADVANCE file structure. Though the MARC structure is maintained, the data is no longer stored according to ISO 2709. (If the records are exported from ADVANCE at a later date, the records are reformatted to meet ISO 2709 as they are exported.)

Once loading is completed, the records are stored in a temporary file and are not in the catalogue until the second step, indexation, is carried out.

Two sets of parameters affect how the records are indexed in ADVANCE:

• Standard indexation parameters define which tags and subfields are indexed;

• Indexation parameters for imported records are defined in the indexing profile.

Indexing Profiles

Indexing profiles are created using *Bibliographic Index MARC* (UBIX) for bibliographic records and *Authority Index MARC* (UAIX) for authority records.

Many different profiles can be created, but a file of records can be indexed by only one profile. To make use of different profiles, the records meant for each profile must be in separate files before loading takes place.

The indexation profile defines the following:

- the institution code for the records to be indexed,

- the field to which the contents of the 001 tag are to be transferred,

- tags and subfields to be deleted,

- transaction code to be added to the records,

- duplicate checking criteria,

- what to do if duplicates are found (or not found),

- what to do in case of error.

NOTE: When bibliographic records are indexed, whether they are imported or created directly in ADVANCE, authority records are created for authority controlled fields. However, this is not the same as importing authority records. There is no duplicate checking of authority records when bibliographic records are loaded.

Record Export

ADVANCE bibliographic and authority records can be exported. The procedure consists of reformatting the records to MARC and ISO 2709, and copying them to an external media (for example, a tape). Exported records can be loaded to any library software system that accepts ISO 2709.

When bibliographic records are exported, a single record is built from the bibliographic record, the authorities are linked and it is copied.

The export function, *Authority & Bibliographic Exporting* (UABE), uses an export profile. The profile can be created before, or at the time of export.

The export profile defines:

- the file from which the records will be exported
- the type of records to export (bibliographic or authority),
- the fields/tags to delete from exported records,
- the output file or tape.

A selection profile, function *Exporting Selection Codes* (UAES), may also be used. It can be used to select only records that contain certain data, or records that do not contain certain data.

The Workfile

The ADVANCE workfiles can be used to store bibliographic and authority records temporarily.

During cataloguing the workfile stores:

- records being catalogued, which should not be accessible in the OPAC until they are completed;

- records modified in acquisitions after having been transferred to the catalogue;

- records deleted from the catalogue by cataloguers.

During loading, the workfile stores:

- approval records that may be used for acquisitions;

- duplicate records found during loading (if the indexing profile is set for this);

- records rejected during loading if the indexing profile is set for this.

In most cases these records can be recovered from the workfile to be modified and indexed in the catalogue, but different types of records may be accessed from different workfiles menus, e.g., deleted records, discarded acquisitions records, etc.

There is a single workfile common to all users.

Identifying Records in the Workfile

Each time a cataloguer files a record to the workfile, an identification code and workfile prefix must be entered. The system associates an identification code (usually the cataloguer's user code) with a record. The workfile prefix allows the system to put the record in a specific workfile.

For example, the workfile prefix *B* (bibliographic records workfile) indicates a bibliographic record accessible through *Bibliographic Workfile Cataloguing* (BWC). *A* is an authority record accessible through *Authority Workfile Cataloguing* (AWC). BE is the prefix assigned to a loaded record rejected by the system and accessible through *Bibliographic Workfile Indexing Errors* (BWIE).

Once a record is filed in the workfile the prefix is invisible to the user. The identification code is displayed in the workfile index.

The parameters for file access can be set to allow each cataloguer to use only certain identification codes when entering or retrieving workfile records. Without additional authorization, cataloguers can use only their own identification codes.

Structure of Records

The data in ADVANCE records is actually spread out in several files, though this is not noticeable to the user. Pointers are used to link elements in the different files.

For example, authority controlled data in a bibliographic record is stored in the authority file, not the bibliographic file. Holdings are also stored in a separate file.

When a record is reconstructed for display, modification, printing or export, the system uses the pointers to link the data elements in the different files.

Workfile records are stored as a whole. They are not linked to authorities or holdings. A holding record can not be stored in the workfile. A copy either exists or does not exist, it can never be *in process*.

Blind Authorities

A blind authority is not linked to any item or any other authority record. That is, it:

• is not linked to any item,

• is not the related form of another authority,

• has no related forms.

Blind authorities can be headings loaded from an outside source that have not yet been used or headings that once were used but became *unlinked* when the bibliographic records to which they linked were deleted from the catalogue.

Established forms and rejected forms of blind authorities are generally not visible in the OPAC. The exception is non-provisional, topical subject headings, which are shown even if they are blind headings. Note that all of the headings can be retrieved during authority cataloguing by using the search type ALL in authority cataloguing or in hot key searches from the bibliographic record.

Conflict Between Established and Rejected Forms

Conflict arises if the same authority heading is an established form in one authority record but a rejected form in another.

These conflicts should be resolved as soon as possible as they are illogical, slow searching and prevent the creation of *See* and *See Also* references. These references can only be made towards established forms, never towards rejected forms. ADVANCE will block any attempt to create *see* references to a heading with both established and rejected forms.

Reports

Reports are an integral part of managing the database. These reports are found in the function *Cataloguing Reports* (CCR) of the cataloguing module.

The reports are grouped in the following submenus:

- Cataloguing Authority

- Cataloguing Authority Statistics

- Cataloguing Bibliographic

- Cataloguing Bibliographic Statistics

Within each submenu a table is presented listing the name of the report, a numerical code, and the width of the report (80 or 132).

```
                      Cataloguing Authority


 OPT# CODE  COL  DESCRIPTION
 ----  ---  ----  ----------------------------------------------------------------
   1. 007   80  Listing of authority cataloguing format types by authority tag.
   2. 006  132  Listing of authority cataloguing format types by authority tag.
   3. 004   80  Listing of authority cataloguing by format.
   4. 005  132  Listing of authority cataloguing format type by tag desc.
   5. 008   80  Workforms for authority cataloguing by format type.
   6. 010   80  Listing of authority tag by tag. Input authority format type.
   7. 009  132  Listing of authority tag by tag. Input authority format type.
   8. 011  132  Listing of authority tags by tag description.
   9. 012   80  Listing of authority tags and subfield with description.
  10. 014   80  Listing of authority cataloguing edit checks by authority.
  11. 123  132  Listing of authority cataloguing edit checks by authority.
  12. 013   80  Authority tags with all subfields and descriptions.
  13. 016   80  Listing of authority workform tag and default information.
  14. 015  132  Listing of authority workform tag and default information.
  15. 016   80  Listing of authority workform tag and default information.

 Options:
  # = # line    F = Forward   B = Backward   E = Exit      ? = ? INFO
```

Select Report

To produce a report:

1. Enter the line number, and then C to continue.

2. Depending on the report, you may be prompted to enter parameters. Generally, < ENTER> provides the largest possible value of the parameter.

3. Enter a heading that will allow you to identify this printout among others. It will be printed at the top of the report.

4. Select output or quit.

    The system prompts: `Quit (X), Print to System Printer (Y), Display on screen(N)`

    X   No report is produced, returns to Report Description screen.

    Y   Report is sent to printer. Verify paper width and number of characters per inch (15 or 17).

    N   The report is displayed on the screen, page by page. <ENTER> to see the next page. To exit the report before the end, <Ctrl> X (Pick) or Q (UNIVERSE). To view a wide report (132 columns) correctly on the screen you should change the terminal set-up to 132.

It is worth testing reports by displaying them on the screen before printing them.

7

Importing and Indexing Records

ADVANCE provides software routines called background processors to perform specified system activities automatically in a background mode, so as to minimize impact on real-time activities: e.g., circulation and online searching. These background processors include the cataloguing processor.

The cataloguing processor is used to control updating of the database (indexing or de-indexing records). It significantly increases the overall performance of all other processes, and provides additional system control for tracking the order and speed at which the database is updated. If there are a number of activities requiring priority processing (e.g., catalogue searching), the processor creates a queue of the data to be updated, and processes the data in order.

There are two steps in starting a processor: connection and activation. Stopping a processor requires de-activation and disconnection.

When a processor is connected it is immediately activated. It can be de-activated which leaves it connected. It can also be disconnected entirely which de-activates and disconnects it.

Deactivation is used occasionally, for example, to produce a report manually.

Connecting and Activating the Cataloguing Processor

Connection and activation takes place in a single step.

To reach the function from the Main Menu, choose Utilities, then processors, then connection/disconnection of processors and finally connection of processors. Or, type UBPM (BACKGROUND PROCESSOR MENU) directly from the Main Menu.

Enter the number of the processor to connect. The system will automatically return to the menu once the processor is connected and activated.

De-activating and Activating the Cataloguing Processor

To de-activate the processor without disconnecting it, choose the function `PCP` and select `Off processor`. To re-activate it, select `On processor`.

```
DD MMM YYYY          Geac ADVANCE Library System (#.#)         DEFAULT1   AU
   HH:MMM                    ADVANCE Development #.#

                     CATALOGUING BACKGROUND PROCESSOR



   Processor status       :  Active

   Processor id(s)        :  5959

   Number left to process :  0

   Start Time             :  28 SEP 98  11:46




Options:
 Redisplay   ? help   Exit   On processor   Off processor
```

Importing Records

This section describes the procedure for loading and indexing records into ADVANCE. The functions described here are accessible by choosing ADVANCE utilities from the Master Menu, then import/export and then either importing bibliographic records or importing authority records.

Loading Bibliographic Records

Loading takes place in *Bibliographic Import Standard MARC* (UBII).

The system will ask if you are loading from a *tape* (T) or a *file* (F). File assumes the records have already been transferred to an ADVANCE file using optional transfer software. Tape assumes the tape is waiting in the tape reader.

If loading from a file:

Filename   Enter the name of the records file.

Selection criteria   To load the entire file, type SSELECT FILENAME

Go to the *Loading, Continued* section.

If loading from a tape:

Responses at this point will depend on which database management system you are using.

Go to the *Loading, Continued* section.

Loading, Continued

The following is common to loading from a tape or a file:

1. Multiple records per block? (Y/N):

   There will be one or many records per block depending on the supplier of the records. For OCLC records the answer is No, for LC, Yes.

2. Format includes an interpretation of the Segment Control Word (Y/N):

   This also depends on the record supplier. N for OCLC, Y for LC. If the response is Y then you must give the length of the segment.

3. Index LC records directly? (Y/N):

   Y will index the records immediately after they are loaded. N means the records will have to be indexed in a separate step using *Bibliographic Index MARC Records*(UBIX).

   • If you answer Y, the system will prompt:

     Indexing type

Enter the code for the indexation profile you want to use (type `??` to access the list of possible codes).

```
Test destination file
```

<ENTER>

- If you answer N, the system will prompt:

```
Destination file (<ENTER> = B.MARC.NEW)
```

Give the filename into which the records will be loaded. The default file name is B.MARC.NEW.

NOTE: the destination file must already exist in ADVANCE.

4. `Do you want to empty the destination file? (Y/ N)`

If you answer Y, the file whose name you just entered will be emptied. If you answer N, the records you are about to load will be added to the file. Answer Y only if you are certain the records in the file have already been loaded.

5. `Continue? (Y/N)`

Answer Y to start loading, or N to abandon the process. If you have made a mistake, N will allow you to start again.

6. The records will then be loaded. Statistics showing the number of blocks read, the number of records loaded, and the speed of loading (seconds per record) will be displayed on the screen.

7. Once loading is completed, the system will ask you to <ENTER>. NOTE: the statistics will disappear once you <ENTER>.

Errors

If the system cannot load the records:

- a message appears: `Error! Tape format or length of segment incorrect`. This means that the information you entered on the structure of the file or tape is incorrect. Enter `Q` to quit. You will return to the beginning and may start again with the correct information.

- the screens remains blank for a long time. Nothing happens. If you are loading from a tape, this means that the system cannot find the tape. The tape reader may not have been correctly chosen, the tape is not in the reader, etc. If you are loading from a file, there are no records in the file. Correct the problem, re-enter ADVANCE and start over.

Indexing Bibliographic Records

Bibliographic records are indexed in *Bibliographic Index MARC Records* (UBIX). This function allows you to create and manage the indexation profiles and start loading.

Indexation is done after loading, if the choice was made to not index the records directly during loading.

```
                Convert / Index Loaded Records

Enter Index Type Code : CIM         Database Code       : CIM
Index Type Description: CIM IMPORTING/INDEXING
Institution of Tape   : AU          Tag/Sub. Del. Code  : *CIM.STRIP
Tag 001 moves to tag       : 35     Add Holding Code    :
Add Transaction Code       :        Cancelled Trans Code:
Local Conversion Subroutine:
Duplicate Check CONTROL Number :        Required  (1 = Yes) :
Duplicate Check LCCN Number    :        Required  (1 = Yes) :
Duplicate Check ISBN Number    :        Required  (1 = Yes) :
Duplicate Check ISSN Number    :        Required  (1 = Yes) :
Check # of Characters in the Title if a Match :
Local Duplicate Check Subroutine            :

If MATCH    Bibliographic Action : 0    Holding Action  :
            Workfile Code        : B    Workfile User ID: *PIT*
If NO MATCH Bibliographic Action : 0
            Workfile Code        : B    Workfile User ID: *PIT*
If ERROR    Bibliographic Action : 1
          Local ERROR Subroutine :
Options:
 ? help   Line by line   Test   Start   Delete   File   Exit
```

Indexing Profile   An indexing profile is used when loaded records are indexed.

Index type code   Code for the predefined index profile. If you enter a known code, the indexing profile is displayed and the cursor is positioned on the option line. If a non-existent code is entered, the system prompts:

```
Table not found. Do you wish to create a new entry? (Y/N).
```

Enter Y to create a new profile.

Database Code   Enter a database code or enter ?? to see a browse list.

Index Type Description   Free text (43 characters).

Institution of Tape	Code for the *Institution* where the records will be indexed. This will become the institution code of the bibliographic records and should be taken from *Holdings Institution Codes* (CHIC) in cataloguing.
Deletion Code	These codes list the tags and subfields that should be deleted from the records before loading. Codes should be taken from Tag/Subfield Deletion Codes (CSMDC) in Cataloguing.
Tag 001 moves to Tag	Tag in which the contents of the 001 should be put.
Add Holding Code	Location code that should be entered in the 049 tag. This affects only LCMARC cataloguing, and only records that do not already have a 049 tag.
Add Transaction Code	These codes show how the record was entered in the system (OCLC loading, for example). Codes should be taken from *MARC Transaction Code* (MTC).
Cancelled Transaction Code	For use only if the incoming records already have a transaction code that should be deleted. For example, records imported from another ADVANCE system.
Local Conversion Subroutine	Enter the name of the local conversion program to be called during indexation.
Duplicate Check	The system will test for duplicate records depending on the criterion entered. You can have no checking done, or have any or all of the following number checks done:

- supplier control number (e.g. OCLC number), commonly 035 $a $z

- Library of Congress Control Number (LCCN), commonly 010 $a $z

- ISBN, commonly 020 $a $z

- ISSN, commonly 022 $a $z

There are two criteria for each number check: the *Duplicate Check...* field and the *Required* field.

No Duplicate Checking
   To have no checking done at all, leave the *Duplicate Check* and *Required* fields next to all the checks blank. Note that no secondary

checking on titles will be done in this case (see *Verify Title if Dupli-cate*).

Single Duplicate Check

To have only one check done, enter `1` in the a *Duplicate Check* field. For clarity, enter a `1` in the check's *Required* field (you could also leave this field blank; in either case the system must find a match on the number).

For all other checks, leave both fields blank.

Consider, for example, ISBN-only checking. The system will report a duplicate record if it finds a match between any ISBN in the incoming record and any ISBN already indexed for an existing record. Other numbers, such as LCCN, are ignored.

Multiple Duplicate Checks — One Match Sufficient

To have more than one check done, enter a number between `1` and `4` in the check's *Duplicate Check* field, and leave the *Required* field blank. For other checks, leave both fields blank.

The number you enter in the *Duplicate Check* field indicates the sequence in which the checks are to be done. If you enter `1` for each check, the system does checks in the displayed sequence: supplier control number, LCCN, ISBN, ISSN.

The system does all checks and then selects the "best match" record as the duplicate record. The best match record is the one which passes the most checks, for example both LCCN and ISBN rather than only ISBN. If there is more than one record tied for the most checks passed, the system selects the one which passed the checks first — this is how the *Duplicate Check* number you assign (`1`, `2`, `3`, `4`) can affect the results.

Consider, for example, LCCN and ISBN checking. The system will report a duplicate record if it finds a match between an LCCN and/or ISBN in the incoming record and an LCCN and/or ISBN already indexed for an existing record.

Multiple Duplicate Checks — All Must Match

For every check that must produce a match, enter a number between `1` and `4` in the *Duplicate Check* field, and enter `1` in the *Required* field.

The system attempts to do all checks, but will stop earlier if it gets no matches for one of the checks (and conclude that there is no dupli-

cate). If multiple matching records are found, the system selects the one it found first as the duplicate — this is how the *Duplicate Check* number you assign (1, 2, 3, 4) can affect the results.

For all other checks, leave both fields blank. These other checks would never effect the results and would only slow down the process.

Consider, for example, LCCN-required and ISBN-required checking. The system will report a duplicate record only if it finds a match between an LCCN and ISBN in the incoming record and an LCCN and ISBN already indexed for an existing record. If an LCCN is found but none of the ISBNs match, the records are not considered duplicates.

Check # of Characters in the Title if a Match

Enter a number if the incoming record's title must match an existing record's title in order for it to be considered a duplicate. This is a secondary check, only done on records reported as duplicates by the preceding number checking process. The number you specify ("n") determines the number of characters to be examined. The system normalizes the incoming title (capitalizing all letters and reducing multiple spaces to single spaces), then compares the first n characters of it against the first n characters of the existing title.

Leave this field blank if you do not want the titles checked.

Local Duplicate Checking Subroutine

If the library uses a local duplicate checking program, enter its name.

If Duplicate

Describe what the system should do if it discovers a duplicate.

If Match Action

If a duplicate bibliographic record is found, then:

0 = Add the record to the catalogue

1 = Add the record to the workfile

2 = Replace the corresponding record in the catalogue with the duplicate.

3 = Same as two, but put the catalogue record in the workfile.

4 = Do not add the duplicate record

Holdings Records

If the duplicate records contain copy information, then:

0 = Add new or update existing pieces from information in the copy tags.

1 = Do not add. Delete the copy tags from the bibliographic record.

2 = Do not add but keep the 049 tag in the bibliographic record (OCLC records only).

3 = Delete all of the piece records in the catalogue that do not have statuses and add pieces from the copy tags to the bibliographic record.

Workfile Prefix   Use B for bibliographic records, A for authority records, and Q for acquisitions records.

Workfile User ID   Enter the user identification code of the records from the workfile.

Not Duplicate   If the record is not a duplicate, then for bibliographic records:

0 = Index in the catalogue

1 = Index in the workfile

2 = Do not index

Workfile Prefix   Use B for bibliographic records and A for authority records.

Workfile User ID   Enter the user identification code of the records from the workfile.

Errors   If the system cannot index a record, then:

0 = Delete the record

1 = Index the record in the workfile.

The records will be retrievable using the *Bibliographic Workfile Indexing Errors* (BWIE) function.

Starting Indexation

On entering the function *Bibliographic Index MARC Records*(UBIX), the system will prompt you for the indexation profile. You have the choice of creating a new profile by entering a new code, or of selecting an existing profile. To see the complete list of existing codes, enter ??.

NOTE: It is advisable to run an indexation test before using a new or modified indexation profile.

Once the profile is chosen, or created, start indexation with the command START.

1. Enter the name of the file in which the records were loaded.

   ```
   Filename to index (<ENTER> = B.MARC.NEW)
   ```

2. Index (S)equentially or (G)et list

   Enter S to index all the records of the file. If you have selected a portion of the records and saved them in a UNIVERSE list, enter G and the name of the list.

3. `Starting key (<ENTER> =n)`

   Enter the key for the first record to index. To index the entire file, enter 1. If part of the file has already been indexed, the key is that of the next record to be loaded. This is kept in memory and proposed by default.

4. `End key (<ENTER> =n)`

   Enter the key of the last record to index. By default, the last record in the file is proposed. <ENTER> to accept default.

5. `Delete records after indexing? (Y/N)`

   If Y then the records will be deleted from the source file after they are indexed. If N, the records will be kept in the original file. This means that at the next loading (function), you must answer Y to the question `Do you want to empty the source file?`.

6. `Create indexation report?`

   If Y, a report will be created that can be printed using function *Bibliographic Index Report Log* (RF173). If previous indexation reports still exist, the system will ask if they should be deleted. Answer Y if they are no longer needed.

7. `Start indexing from <filename>? (Y/N)`

Y to start indexation. The system will index the records, displaying statistics every 10 records. At the prompt, EXIT.

N to cancel. At the prompt, EXIT.

Indexation Test

A test can be carried out before starting an indexation by using the command TI.

1. The system will prompt:

   ```
   Filename to index (<ENTER> = B.MARC.NEW)
   ```

   Enter the name of the file in which the records were loaded.

2. `Destination test filename`

   Enter the filename in which the records will be indexed. This file can be examined by using the editor. Each record will be put in a file with the original form of the record, the indexed record and possible duplicates. This file must be created before starting the test.

   If no filename is entered, the records will be indexed in the catalogue.

The next questions will be the same as for a real indexation. See *Starting Indexation.*

Stopping the Indexation of Bibliographic Records

Occasionally, it may be necessary to stop an indexation in process. For example, the indexation may be taking longer than expected and must be stopped to increase response time. Or, an error in the indexation profile may be discovered.

The function *Bibliographic Stop MARC* (UBIS) will stop the indexation cleanly and allow it to be restarted at a later date.

You must enter *Bibliographic Stop MARC* (UBIS) from another terminal, not the one on which the indexation was started. The system will prompt:

1. `File being indexed (<ENTER> = B.MARC.NEW)`

    Enter the name of the file which is being indexed.

2. `Stop indexation? (Y/N)`

    Y to stop indexation, N to leave this function.

Indexation Reports

Function *Bibliographic Index Report Log* (RF173) is used to produce reports on indexation if the question Create Indexation Report was answered Y.

This report will allow you to find such cases as records entered in the workfile as duplicates, records not accepted by the system, etc.

1. Enter function *Bibliographic Index Report Log* (RF173) and enter C to start the report.

2. The system will prompt:

   ```
   Starting date (DD/MM/YY)
   ```

   The report will provide information on the indexation started after this date.

   ```
   End date (DD/MM/YY)
   ```

   Enter the last date of the period you are interested in.

3. ```
   Print only (1) errors (2) non-errors
   ```

   Enter 1 for a report on indexation errors. Enter 2 for a report on correct records. <ENTER> for both.

4. ```
   Print only (1) duplicates (2) non-duplicates
   ```

   Enter 1 for a report of duplicates only. Enter 2 for a report on single records only. <ENTER> for both.

5. ```
   Message
   ```

   By default each record in the report will be followed by a message indicating what was done to it. If you enter a message at this point, only the records followed by this message will be in the report. Possible messages are:

   • CATALOGUE

   • WORKFILE

   • DUPLICATE

   • SKIPPED

   • REPLACED

   • REPLACED IN WORKFILE

- ADDED TO CATALOGUE

- ADDED TO WORKFILE

6. Enter the heading you want printed at the top of the report.

    `Heading`

Enter `EXIT,` `PRINT` and `DISPLAY` to view it on the screen.

The system prompts: `Quit (X), Print to System Printer (Y), Display on screen(N)`

X   No report is produced, returns to Report Description screen.

Y   Report is sent to printer. Verify paper width and number of characters per inch (15 or 17).

N   The report is displayed on the screen, page by page. <ENTER> to see the next page. To exit the report before the end, <Ctrl> X (Pick) or Q (UNIVERSE). To view a wide report (132 columns) correctly on the screen you should change the terminal set-up to 132.

Importing Authority Records

Authority records are imported in the same way as bibliographic records. The utilities used are similar to those used for bibliographic records.:

Authority Import Standard MARC (UAII)	Bibliographic Import Standard MARC (UBII)
Authority Index MARC (UAIX)	Bibliographic Index MARC (UBIX)
Authority Stop MARC (UAIS)	Bibliographic Stop MARC (UBIS)
Authority Index Report Log (RF172)	Bibliographic Index Report Log (RF173)

Replace B.MARC.NEW with A.MARC.NEW when required.

Bibliographic Index MARC Records (UBIX) and Authority Index MARC Records (UAIX) differ in their profile definitions. The authority profile uses a second screen to specify the filing actions taken based on how headings in the imported record match those in the database.

See *Authority Loader* on page F-1.

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Exporting Records

Defining a
Selection Profile

A selection profile allows export records to be chosen by criteria of inclusion or exclusion. The profile is defined in *Exporting Selection Codes* `(UAES)` and used in the function *Authority & Bibliographic Exporting* `(UABE)`.

A selection profile is not required to export records. A query language phrase can also be used to select records for export. However, a selection profile allows for a more precise choice and it can be used again and again.

1. On entering the function *Exporting Selection Codes* `(UAES)`, a list of codes for existing profiles is displayed. An existing profile can be retrieved or modified by entering its line number. A new profile can be created with the command `Add Item`.

```
                      CAT.OUTPUT.SELECTION CODES

      : test                                 *** New Record ***


      ----------------------------------------------------------------------

    1. Description                  :


      Inclusive
    2. Must all Inclusive (1 = Yes)    :
       tests be satisfied?
    3. Encoding levels                :
    4. TagsSubfieldData              :
       eg: 910,970a,278aN832.34



      Exclusive
    5. Must all Exclusive (1 = Yes)    :
       tests be satisfied?
    6. Encoding levels                :
    7. TagsSubfieldData            :
    8. Exclusive has precedence (1 = Yes):
Options:
? help   # line   Copy    Print    Delete    File    Exit
```

2. The system will prompt:

    Description

    Enter profile name

3. Including?

    Are all inclusions required? Enter 1 for yes. In this case the system
    will select only those records that contain all the criteria listed in the
    field *Field/subfield/data*.

    0 for no. Records will be selected if they contain at least one of the
    criteria from the field *Field/subfield/data*.

4. Encoding level

    Use the standard definition (this field is rarely changed).

5. Field/subfield/data

    Enter the data that the records must have in specific fields or
    subfields, or the fields or subfields that a record must have. The

format should be as follows: field, or field/subfield, or field/subfield/data.

Example:

710	All records with a field 710.
710/e	All records with a field 710, subfield e
710/e/Paris	All records with "Paris" in tag 710, subfield e.

Use commas to separate criteria: 210,500/a,710/e/Paris

6. `Excluding`

The first prompts are the same as above.

7. `Priority for exclusion`

`1` for yes. In this case, and if there are inclusion criteria, the system will select records based on the exclusion criteria, then apply the inclusion criteria.

`2` for no. The records will be selected according to the inclusion criteria, first, then by exclusion.

Exporting

The export profile should not be confused with the selection profile. The selection profile is a filter that may be used to select records for export. The export profile is required for export and describes the way in which the records will be exported.

On entering the function *Authority & Bibliographic Exporting* (UABE), the system will ask for an export profile code. Enter ?? for a list of codes of existing profiles. An existing profile can be retrieved by entering its line number. A new profile can be created by entering a new code name (20 characters maximum).

To export records that conform to the USMARC holdings standard, you must specify the type of holdings you want to export on the Convert/ Output Marc Records screen.

To specify the type of holdings, enter:

- 852 in the *Holdings Tag* field for USMARC standard holdings, or

- OUTPUT.NONSTANDARD.852 in the *Local subroutine* field to export pre-6.7 ADVANCE holdings.

```
                    Convert / Output Marc Records

   Output Type Code   :  GC.BIB

   1) Description      :  EXPORT BIBLIOGRAPHIC RECORDS
   2) Database Code    :  MAIN
   3) Input Location   :  D
   4) Location Detail  :  B

   5) Output Format    :  O           8) Archive status  :   0
   6) Output Location  :  F           9) Deletion status :
      Output Detail    :  MIKEC.WORK
   7) Local Subroutine :

  10) Contents         :  2   (0 - No holdings, bib only; 1 - Holdings only;
         2 - Bib and holdings; 3 - No holdings, bib plus 856 only)
  11) Create Tag 001   :             14) Indicator Length :  2
  12) Tag Del. Code    :
  13) Local subroutine:

  Options:
   ? help   # line   Start   Delete   File   Exit
```

1) Description	Text string that displays on screen and in the Convert/Output MARC Records browse list. Use up to 56 characters including blanks.
2) Database Code	Enter a database code or enter ?? to see a browse list. Only records exported from this database will be added to deleted workfiles. For example, if you specify MAIN here then Citation database and community information records will be lost.
3) Input Location	Possible responses are: D – Database W – Workfile F – File Use File only if the records are already in a database management file.
4) Location Detail	Enter B for bibliographic records and A for authority records.
5) Output Format	U – USMARC (or LC MARC or UNIMARC) O – OCLC L – Local ADVANCE. L is used to export records to another ADVANCE system.
6) Output Location	T – export to a tape, F – export to a file. To use *File*, the file must already exist, and you should be prepared to enter its name.
7) Local Subroutine	Use only if the output is to a file. Be prepared to enter its name.
8) Archive status	1 - the export date (UNIVERSE format), and the date and time of creation, (or last modification) of the exported records will be entered to attribute 10 of the B.MARC file. This allows exported records to be retrieved easily. 0 - there will be no difference between exported records and the rest of the database.

9) Deletion Status	Currently not supported. (The system prevents you from entering data into this field.)

10) Contents   Possible values are :

0 – No holdings, bibliographic records only

1 – Holdings only

2 – Bibliographic records and holdings

3 – No holdings, bibliographic records
     plus 856 (electronic holdings)only

0   Choose this option to export bibliographic records only (no holdings).

1   Choose this option to export holdings records only.

2   Choose this option to export bibliographic and holdings records together.

3   Choose this option to export bibliographic records only (no holdings). The system embeds 856 tags containing electronic location and access information (found in your location copy records) into your bibliographic record during the export. This field has no effect if the Location Detail field is set to A for authority records.

If you want to export copies (holdings information) linked to bibliographic records, enter either 1 or 2. The system opens a subwindow and it will be necessary for you to supply the following information.

```
        Format of Holdings Information
(U)SMARC,(G)eac MARC  : G
Holdings Level        : 3
Holdings Sublevel     :
Embedded (Y/N)        : N
MARC tags to include  :
```

(U)SMARC, (G)eac
format:

U   Exported holdings records contain only those tags defined in the USMARC Format for Holdings Data standard (Update No. 2, July 1994).

G   Exported holdings records contain all of the tags defined in the USMARC Format for Holdings Data standard (Update No. 2, July 1994) plus some Geac defined tags. Some of the information in the Geac defined tags includes circulation status, owning location, last received issue and last date received. See SFINSERT GEAC.MARC.TAGS for a list of Geac defined tags.

Holdings level   Valid answers are 1, 2, 3, 4, 5 and 6. This defines the level of specificity of the holdings statement represented by the holdings record.

1   The least specific level of holdings. This level requires that location data information is reported. This must include the institution but may also contain the sublocation, the collection and other location specific information. This level is a synopsis or summary of where the holdings exist. One holdings record is created for each unique combination of location information. You cannot tell how many copies are at a particular location but you can tell that something is there. When the Holdings Level is set to 1, the Holdings Sublevel must also be defined.

2   Detailed display for single-part titles. One holdings record is created for each copy of the title held by the library regardless of location information. This level includes a barcode (if any) attached to the copy.

3   This level is used for multipart and serial titles. It includes copy-specific summary holdings information but only at the first level of enumeration or chronology. Gaps are recorded at this level and the determination of when a gap occurs depends on whether or not any portion of a bibliographic unit is held by the library. For example, if the enumeration for a title is recorded in terms of volumes and issues, a gap is recognized by a volume for which no issues are held. If even one issue within a particular volume is held, no gap occurs.

4   This level is used for multipart and serial titles. It includes detailed holdings information at all levels of enumeration and chronology for each copy. Gaps are recorded at this level and are determined by the absence of any bibliographic unit at any level of enumeration or chronology. For example, if v.2:iss.3 is not held by the library, a gap will be shown between v.2:iss.2 and v.2:iss.4.

5   This level is used for multipart and serial titles. It includes detailed holdings information at all levels of enumeration and chronology for each

copy. Gaps are determined as in level 4. Level 5 also includes piece designations (barcodes).

6   This level is used to export PIECES information from your system to another ADVANCE system.

Holdings sublevel   Valid only if Holdings Level is answered 1. The holdings sublevel defines the level of detail of location information required in the level 1 holdings record. Valid answers are 0 through 4.

0 - include only institution information

1 - include only institution and sublocation information

2 - include only institution, sublocation, and collection information

3 - include all location information (i.e., institution, sublocation, collection, call # prefix, call number, call number suffix, copy number)

If you are exporting a single-part title and have selected a Holdings level greater than 2, the program exports a level 2 record for each holding.

If you are exporting a multipart or serial title and have specified a Holdings level of 2, the program exports the equivalent of a level 1 sublevel 3 record for each unique combination of location information.

Embedded   Embedded holdings tags are contained in the related USMARC bibliographic record. If the holdings tags are not embedded, there a single separate USMARC record (containing only the holdings tags and some other identification tags) created for each location where the library has holdings.

Y   This is a valid answer only if *Include Holdings* is set to 2 otherwise answer N. If the Holdings level is set greater than 2 but not equal to 6, holdings cannot be embedded in the bibliographic record and you will not be prompted for this field. If the Holdings level is set to 6, this field is automatically set to Y.

MARC tags to include   Applies to holdings records only. This list is not used if holdings records are embedded. The default list includes 7, 10, 20, 22, 23, 24, 27, 30, 583. These tags are automatically taken from the bibliographic record and put into each Holdings record created by the export. To include additional tags from the bibliographic record in the Holdings record, enter the

tag(s) at this prompt. Separate each tag number with a comma and do not include leading zeros.

Institutions — The institution codes for the records to be exported. Enter them separated with commas, but without spaces.

11) Create Tag 001 — If nothing is entered in this field the 001 tag will be filled from the Local Control Number. In addition, tag 001 will contain the original institution code of the exported records; and b or a to indicate if the records are bibliographic or authority records.

Otherwise, enter the tag from which the 001 should be constructed.

12) Tag Del Code — This field allows the use of field deletion codes defined in the Tag/Subfield Deletion Codes (CSMDC) function of cataloguing. The tags and subfields in this code will be deleted from exported records.

Type ?? to consult the list of codes available. Retrieve the code by entering its line number.

13) Local subroutine — This allows you to use a program written specifically for your library. If you have a program of this type, enter its name here.

To use a selection profile defined in the function Exporting Selection Codes (UAES), enter CAT.BIB.OUTPUT.SELECT.

14) Indicator Length — Total length of indicator. LCMARC and UNIMARC always have two.

Starting Export

Enter S to start export. Different messages will be displayed depending on whether you are exporting to tape or file.

1. Exporting to tape

   Before starting the export the tape must be in the tape drive. Respond to the prompts by using the commands that correspond to your database management system. Examples are:

   Command to select tape device

   Command to attach tape device

   Rewind tape drive

2. Exporting to file

   The system displays the filename entered in the Output format of the export profile. <ENTER> to accept it, or enter another filename.

3. The output file will be emptied. Enter Y to continue or N to escape.

   These procedures are identical for export to file or tape.

4. Are theses parameters correct? (Y/N/S)

   Enter Y to continue, N to enter another filename, or S to stop completely and return to export menu.

5. Enter selection criteria

   You may enter a query language phrase to select the records from B.MARC (bibliographic) or A.MARC (authority) to be exported. For example:

   SELECT B.MARC WITH MAT.CODE = "cm"

   or

   SELECT B.MARC WITH F1 = "[cm]"

   to select all records with am in the leader.

   If no query language phrase is entered, the following prompts will appear. One of these two selection methods must be used. They cannot be combined.

6. Start record number

   Enter the first bibliographic or authority record number.

7. End record number

   Enter the last bibliographic or authority record number. By default, <ENTER> selects the last record number created.

8. `Records selected. Do you want to continue? (Y/N):`

   `Y` to continue, `N` to escape.

9. If the export profile contains CAT.BIB.OUTPUT.SELECT in the second field of the local program, you will be prompted:

   `Selection profile code?:`

   Enter a code from the function Exporting Selection Codes (`UAES`).

10. If you answered `Y` to the question do you want to continue, the exportation will begin. Statistics will be displayed at the bottom of the screen. They will give:

    • number of records treated

    • number of records exported,

    • time required

    • number of errors

    • number of blocks

11. Once the export is finished, the prompt:

    `Do you wish to continue? (Y/N)`

    will appear. Enter `Y` to do another export. You will return to the

    Selection criteria prompt. Enter `N` to finish.

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9

Database Management

Workfile Management

For information on filing and retrieving records in the workfile (functions Bibliographic Workfile Cataloguing [BWC] and Authority Workfile Cataloguing [AWC]), see *Cataloguing User's Guide.*

Managing Records in the Workfile

Several reports are available to display or print the records in the workfile. They are accessible through the cataloguing function *Cataloguing Reports* (CCR).

Workfile Reports

REPORT	DESCRIPTION
076	Lists workfile records by cataloguer – Summary
077	Gives the contents of all bibliographic or authority records with a specific user's identification code – Detail
078	Workfiles by Current Cataloguer - Detail
079	Lists all records in the workfile – Summary
080	Gives the contents of all workfile records in MARC – Detail

Report 076 should be created at regular intervals as it is extremely useful in cleaning up the workfile, for example, to eliminate deleted records.

Transferring Records Between the Catalogue and Workfile

To avoid duplication of records care must be taken when transferring records from the workfile to catalogue and vice versa. The status codes are described in detail in the *Cataloguing User's Guide.*

After retrieving and modifying a record from the catalogue, you may use the code:

- 3 to re-index the new version in the catalogue;

- 1 to index the new version in the workfile and keep the old one in the catalogue;

- 4 to delete the record from the catalogue.

Using code 1 can be dangerous. It will create two versions of the same record, one in the catalogue and one in the workfile. If you then delete the record from the workfile and index it in the catalogue (code **23**), a duplicate record will be created. The workfile record **will not** cover the catalogue record.

A similar situation can arise when a workfile record is retrieved and modified. In this case the codes are:

- 1 to re-index the record in the workfile;

- 2 to delete the record from the workfile;

- 3 to index the version in the catalogue and keep the old one in the catalogue;

- 23 to delete the record from the workfile and index it in the catalogue.

Using code 3 can lead to duplication of records, if code 23 is later used.

In both cases it is important to delete a version of the record. When a version of a record is in both the catalogue and the workfile, the LOCATION AND AVAILABILITY OF RECORDS screen will appear whenever the record is retrieved from the catalogue or when the record is retrieved from the workfile, if the catalogue version has been modified in the meantime. This serves as a reminder that the record already exists in two places and gives you the chance to verify both versions. The two record numbers are also given to allow you to verify them easily.

Other Records in the Workfile

Access to records in the workfile depends on how they were put there. Records put in the workfile by a cataloguer, for example, are accessible through Bibliographic Workfile Cataloguing (BWC) or Authority Work-

file Cataloguing (AWC). Other records will have different source codes, and access to those codes is required to access the records.

Other Workfile Records

Type of Record	BIBLIOGRAPHIC Access Allowed From:	AUTHORITY Access Allowed From:
Deleted	Deleted Records Workfile Browse Delimiter (BDBD)	Deleted Records Workfile Browse Delimiter (ADAD)
Loading error	Indexing Errors Workfile Browse Delimiter (BEBD)	Indexing Errors Workfile Browse Delimiter (AEBD)
History records	History Records Workfile Browse Delimiter (BJBD)	History Records Workfile Browse Delimiter (AHBD)
Discarded Acquisitions Records	Discarded ACQ Workfile Browse Delimiter (BHBD)	Discarded ACQ Workfile Browse Delimiter (BHBD)

Searching in these functions is the same as in Bibliographic Workfile Cataloguing (BWC) or Authority Workfile Cataloguing (AWC).

The source code for records modified in Acquisitions after being transferred from the catalogue is configured in FISCL. (See *Acquisitions Setup Guide).*

Blind Authorities

Blind provisional authorities (defined by tag 008/33=c) are automatically deleted when the last use of the heading is removed and the provisional authority contains no tags other than 008, 040, or 1XX.

Blind non-provisional topical subject authorities display in the Online Catalogue.

Finding Potential Duplicate Authorities

Report 175, Authorities with Similar Browse Heading, lists groups of authorities with headings that normalize identically (whether linked to bibliographic records or not), largest groups first. The report lists the heading, Authority control number, and Dcodes.

This report produces a list of all authority records which may need correction or merging. The list consists of all browse headings, but not all are authority controlled. The system does not differentiate established headings from rejected forms, nor does it differentiate between authorities from different thesauri.

Using Report 175

You can print the report and retrieve authorities by record number in the AMC function. To make the list more manageable remove the headings which are not authority-controlled as indicated by the Dcodes.

Cleaning up the Database

Occasionally conflicts may arise in the database, usually caused by rule changes or mistakes in cataloguing bibliographic or authority records.

In the OPAC if one of these headings is retrieved, the system will show both the records indexed as the established form of the heading, and a see reference to the records indexed as the conflicting rejected form.

For example, if *bike* was the established form for three records, and the rejected form of bicycle for seven records, a search of *bike* in the OPAC would lead to:

	Titles	Subject Headings
1.	3	Bike
		Bike
2.	7	<SEE> Bicycle

As stated earlier this type of conflict should be resolved. Using report 175, either the rejected form should be removed from an authority to create two separate authorities, or the two authorities should be merged.

Rejected Forms Linked to Several Established Forms

Verification of Local Authorities

Locally created authorities can be verified by a cataloguing supervisor. To do this, the authority must be easily distinguished and retrievable as a local authority. This simplest way to do this is by *marking*. If an asterisk space is entered before each local authority the records index normally.

Example: (LCMARC): 650 BB $a * French $x Customs

After verification, the asterisk can be removed.

Managing Brief Records

In some cases items are catalogued with brief records to allow them to be circulated while waiting for full cataloguing records to be loaded. It is important to be able to retrieve these records easily so as to be able to request the full bibliographic record, and to index them with a specific index profile.

Cataloguing Brief Records

A brief record can be entered manually with a very simple workform. For example, you may choose to enter ISBN (including dashes) and a specific control tag number on your workform.

```
XXX BB $a Brief record
```

Tag XXX allows the record to be retrieved easily. Its content is unimportant as long as it is there.

In some cases, the item being catalogued will not have an ISBN. Records with and without ISBN's could be reported separately.

Replacing Brief Records

Records can be imported to cover the brief records. Follow the procedures described in *Importing Records.*

For brief records with ISBN, an indexation profile should be used which includes duplicate checking on ISBN, covers the ADVANCE record by the imported record, and links copies to the imported record.

Records without ISBN cannot be covered automatically. Instead the indexation profile should load the records to the workfile with a specific identification code. These records should be transferred to the catalogue using the function *Bibliographic MARC Cataloguing* (BMC) and the right code. Finally, the brief records will be replaced by using the Replace command in the function BMC.

A single indexation profile can be used for both ISBN and non-ISBN records by covering duplicate records and putting all others in the workfile.

Copies linked to the brief record will automatically be linked to the imported record when it is covered either automatically or manually.

10

Global Change Utility

The *Global Change Utility* (GBLCNG) on the *Cataloguing Utilities Menu* (CUTI) enables you to globally count, report changes, or delete MARC bibliographic or authority records. The selection criteria you specify includes the occurrence of a specified text string in specified MARC fields/indicators/subfields/offsets, and can also include specified cataloguing dates, cataloguers, institutions, and MARC leader text. Also, in the case of authorities you may specify OPAC qualifier codes. You may also select records via a record range, using a TCL SELECT command, using a TCL SAVE.LIST, or from searching the OPAC.

If you are changing records, you can replace matching text with new specified text, remove the old string, remove the old field and/or change the old field/indicator/subfield coding to new specified data.

You may perform several changes at one time and may perform several actions in each change. You may also save the operations and selection criteria in a named profile record that may be retrieved at a later time.

NOTE: If the global change utility is run while records are locked, the locked records will not be changed. To ensure all records are changed, use the global change utility when no one else is editing the bibliographic or authority records.

Using Global Change

When the Global Change Utility (`GBLCNG`) is selected, the system prompts you for a profile name. Enter the name of the profile you want to use or type `??` to browse a list of previously defined profiles.

If enter a new profile name, the system prompts:

```
Table not found. Do you wish to create a new entry? (Y/N) :
```

Answer `Y` to create a new profile. `N` returns you to the *Enter Global Change profile:* prompt.

```
                    GLOBAL CHANGE UTILITY


Enter Global Change profile: SAMPLE
1. Description      : global change sample record
2. Database         : A = Authority
3. Method           : S=Search the OPAC
4. Selection Criteria :
5. Action Table     : ( 4 actions)
    Search String : U.S.
    Case Sensitive : Y   Exact Word : Y   Preserve Case : N
    Marc Tag : 110      Indicators :
    Subfields : a                        Offset :
    Action : C=Change String to  "United States"

    Search String : IEEE Symposium
    Case Sensitive : Y   Exact Word : Y   Preserve Case : N
    Marc Tag : 110      Indicators :
    Subfields : a                        Offset :
    Action : CT=Change Tag to  111
Options:
 ? help   Forward   # line   Line by line   Start   Exit   File   Delete
 Print   Copy
```

1. Description	Enter a free format description of the profile.
2. Database	Enter B for bibliographic or A for authorities.

You may also specify a list of OPAC index codes. The system will verify that these are valid INDEX CODES. To see the list of INDEX CODES select OPAC Indexes (OI) from the ONLINE SEARCH SETUP Menu. NOTE: INDEX CODES M (Authority) and C (See references) are reserved by the system and cannot be specified.

3. Method		Specifies how you want to retrieve the records.
	SC	Sequentially scan the database. You may specify a starting point in the database by entering the starting and ending Local Control Number (LCN) separated by a "-". If you do not specify a record range the system looks for the last LCN processed by this profile. If the last LCN can't be found the system defaults to the lowest LCN for this profile. When the global change process is run and processing is incomplete, the system asks you if you want to save the last LCN processed. If you agree the last LCN is assigned. NOTE: This only occurs in sequential scan mode.
	S	Search the OPAC. Optionally, you may specify a search command.
	G	Use an existing TCL SAVE.LIST against the specified database. You must specify the SAVE.LIST to use.
	SL	Issue a TCL SELECT statement against the database specified. You may add parameters to qualify the SELECT statement.
4. Selection Criteria		Specify one or more criteria for the selected records. A separate screen controls this section. See *Criteria Selection Screen* on page 10-4.
5. Action table		Specify one or more change requests to be performed against the selected records. A separate screen controls this section. See *Action Table Screen* on page 10-6.

Criteria Selection Screen

This screen appears when you select *Selection Criteria* field from the GLOBAL CHANGE UTILITY screen.

```
              GLOBAL CHANGE UTILITY Selection Criteria


Global Change profile: SAMPLE
Description          : global change sample record

1. Leader           :
2. Cataloguing Date : 1990-1993
3. Cataloguer       :
4. Institution      :




Options:
 ? help   # line   Line by line   Delete   Accept   Exit
```

1. Leader

MARC leader text as displayed in the *Leader* field of the BIBLIO-GRAPHIC MARC CATALOGUING or the AUTHORITY MARC CATA-LOGUING screens. The match is done on only as many characters as you specify (starting from the beginning of the Leader display text). Use an asterisk (*) as a wildcard character. Be careful to use upper and lower case letters as appropriate. You may specify multiple strings, separated by commas. For example, if the individual criteria are cam, *am and ***I , the system matches on any record that contains both elements such as the leader camIi020.

2. Cataloguing Date

The *Cataloguing Date* field corresponds to the *Last updated* field on the BIBLIOGRAPHIC MARC CATALOGUING or the AUTHORITY MARC CATALOGUING screens. YYYYMMDD (where YYYY means year, MM means month, and DD means date). You may also use a hyphen after the date to mean *or following*. You may specify multiple dates or date ranges, separated by commas. Examples:

1993 means 1993
199307 means July 1993
19930730 means July 30, 1993
1991-1993 means 1991, 1992, or 1993

-1992 means up to or including 1992
1992- means 1992 or after
199306-199307 means June or July, 1993
1991, 1993 means 1991 or 1993

3. Cataloguer

The Cataloguer's User ID (sometimes called Access Code or User Iden-tification Code), is the value displayed in the *Cataloguer* field on the BIBLIOGRAPHIC MARC CATALOGUING or the AUTHORITY MARC CATALOGUING screens. Be careful to use upper and lower case letters as appropriate. You may specify multiple User IDs separated by commas.

4. Institution

The Institution Code for the institution that owns the record. This could be the Institution Code for which the record was loaded or the Institution Code for the cataloguer who catalogued the record. Be careful to use upper and lower case letters as appropriate. You may specify multiple codes, separated by commas. Enter ?? for a list of valid codes.

Action Table Screen

This screen appears when you select *Action Table* field from the
GLOBAL CHANGE UTILITY screen.

```
                    GLOBAL CHANGE UTILITY Action Table


    Global Change profile: SAMPLE
    Description         : global change sample record

    Action Table: ( 4 actions )

     1. Search String : U.S.
        Case Sensitive : Y   Exact Word : Y   Preserve Case : N
        Marc Tag : 110       Indicators :
        Subfields : a                          Offset :
        Action : C=Change String to  "United States"

     2. Search String : IEEE Symposium
        Case Sensitive : Y   Exact Word : Y   Preserve Case : N
        Marc Tag : 110        Indicators :
        Subfields : a                          Offset :
        Action : CT=Change Tag to  111

    Options:
     ? help   Forward   # line   Add item   Delete #   Delete   Accept   Exit
```

1. Search String

Enter the text that you want to searched for within selected data. The
string can include letters, numbers, spaces, and punctuation; only the
first 52 characters will be displayed, but up to 252 characters can be
entered. Leading or trailing blanks can be entered. Specify empty fields
by enclosing them in double quotes ("). To search for a string in quotes,
such as "A New Deal" enter ""A New Deal "".

To search for a string that spans subfields you must use a blank space to
separate the fields. For example, to search for $aMusic$xTheory you
must specify it as Music Theory.

The search comparisons are against the data only. The system does not
search the MARC field indicators or the leader.

Case Sensitive

Enter Y to match exactly the case of the record with that of the Search
String text. For example, Harper & Row will not match harper & row.

Enter N to ignore the case of the Search String text when searching for matches.

Exact Word Enter Y to ensure that the text in the record will not have alphabetic characters immediately before or after the Search String text. For example, *Harper & Row* will not match *Harper & Rows* or *Sharper & Row* (but will match *Harper & Row;*).

Enter N to allow matches regardless of surrounding text. For example, rap will match Bibliographic.

Preserve Case This field is only used if the *Case Sensitive* field is answered N, otherwise it is ignored. Y in this field will maintain the case of the field. For example, if the Search String is *fish* and you are changing the string to *chicken* and Case Sensitive is N, fish will be replaced by *chicken*, *Fish* will be replaced by *Chicken* and FISH will be replaced by CHICKEN.

Marc Tag MARC field tag, commonly three digits. You may enter an asterisk (*) in place of a digit, and you may omit leading zeroes. Examples:

150

1** means any 3-digit tag that begins with a 1, such as 110 or 150.

35 is the same as 035

** means any 2-digit tag, such as 035

*** means any 3-digit tag, such as 245

Indicators MARC field indicators. Leave the *Indicators* field empty to ignore the contents of the indicators. Enter B to represent the MARC indicator value blank. Specify each indicator separated by commas. For example to only consider fields with indicator 1 as either 1 or 3 and indicator 2 as blank specify it as 13,2.

Subfields MARC subfield identifiers, commonly lower case letters but sometimes digits. You may specify multiple subfields, separated by commas. Leave the *Subfields* field empty to have the system search for the Search String in all subfields. For example a,c means combine subfields a and c to form the comparison string.

Offset Offset within the comparison string. Enter either a single value or a range of values. For example, to search the language field (offset 35) in the 008 tag you would specify 035-037.

Action   This field lists the actions that will be performed if the Search String text is found. Each of the current actions is displayed in turn. If you enter a carriage return, the action will be retained. If you enter # the action will be removed. You will be presented with an empty action field after all the actions have been displayed. This gives you an opportunity to enter new actions. A carriage return will end the action modifications. If any action requires additional information, you will be prompted for the information. Valid actions are:

C	Change String
CS	Change subfield coding
CT	Change field coding
CI	Change Indicator coding
DS	Delete String
DSB	Delete Subfield (and its data)
DF	Delete Field
D	Delete Record
K	Counts the matching records.

For example, the following profile moves the 100 $a data to a 111 $t.

```
                GLOBAL CHANGE UTILITY Action Table


Global Change profile: MOVETEST
Description          : Testing move example

Action Table: ( 1 actions )

 1. Search String : Larry
    Case Sensitive : N   Exact Word : N   Preserve Case : N
    Marc Tag : 100        Indicators :
    Subfields : a                        Offset :
    Action : CT=Change Tag to 111;CS=Change Subfield to t


Options:
 ? help   # line   Add item   Delete #   Delete   Accept   Exit
```

Run Time Options

When the profile is executed by selecting the *Start* option, the following screen appears. If you are searching the OPAC or to issuing a a select statement and you have not provided any additional information, you will be asked for the data.

```
                    GLOBAL CHANGE UTILITY

Profile Name: SAMPLE
Description: global change sample record


Enter processing option: R




 K - Count only, R - Report only, C - Confirm all changes, N - No Confirmation
```

These options are available to you:

K – counts the matches

R – reports the changes

C – prompts you to confirm the changes to each record

N – performs the action without intervention.

For all options except K a list of all changes is provided. When the utility finishes processing, a summary screen is displayed and you are asked if you want to print the report.

Change Prompts   For C, the system prompts you to confirm.

```
                    GLOBAL CHANGE UTILITY - CONFIRMATION

Local Control Number: 10000741

100  1B         $aB\ACeguerie, Ph.$q(Philippe)

100  1B         $aB\GReguerie, Ph.$q(Philippe)




Options:
 Yes   No   Quit   ? help
```

    Yes   Accept the changes.

    No   Do not accept the changes.

    Quit   Stop processing.

A

Using ADVANCE

This appendix provides some general instructions on how to use ADVANCE:

- the parts of a screen
- selecting menu items
- selecting screen options
- editing in data fields
- editing in data field windows.

The Parts of a Screen

The ADVANCE screens follow a common design, as illustrated in the following sample menu — the ADVANCE MASTER MENU.

Menu Screens

Each menu screen typically has:

- the **software name** (Geac ADVANCE Library System) and **release number** (RRRR, e.g. 5.00), and your **library system name** (Your Library Name), at the top centre of the screen

- the **date** (DD MMM YYYY) and **time** (HH:MM), in the top left corner of the screen

- the terminal's **Port Code** (PPPPPP)and default **Institution Code** (IIIIII), in the top right corner of the screen

- a **screen title** (e.g. MASTER MENU), four lines down in the centre of the screen

- an **information display** or **work area**, in the middle of the screen

- an **options area** for entering a menu option, at the very bottom of the screen.

```
DD MMM YYYY          Geac ADVANCE Library System (RRRR)        PPPPPP  IIIIII
   HH:MM                      Your Library Name

                              MASTER MENU



        1. CAT   Cataloguing              4. ACQ   Acquisitions

        2. CIRC  Circulation              5. SER   Serials Control

        3. OPAC  Online Catalogue         6. UTIL  Utilities

                        7. ON    Change User

                        8. OFF   Log Off




        Enter the number of your selection and press <ENTER>
                or  ?  followed by <ENTER> for Help :
```

Non-Menu Screens

Most non-menu screens lack the information shown in the top three lines of menu screens, and list the options across the bottom of the screen. A sample ordering screen from Acquisitions is shown below.

The operator's **User ID** (ᴜᴜᴜᴜᴜᴜ) is shown in the top right corner of many screens.

```
            ORD - ORDERING DATA                          UUUUUU

PO#/LINE#: 9200000314/0001    VENDOR   : PENGUIN     ORDER DATE: 02/08/93
REQUEST #: 920123             ORDER TYPE: REGULAR    REQST DATE: 02/08/93
LIBRARY  : UL                 CONDITION : OPEN        EST DELVRY: 02/22/93
ISBN/ISSN: 0898598125         LC CARD # :   85029331  RECEIVED  :
AUTHOR   : Buss, Arnold H.,  1924-
TITLE    : SOCIAL BEHAVIOR AND PERSONALITY.

STATUS   : Rush Order

 1. VENDOR   : PENGUIN    6. SELECTOR : ACQ      10. UNIT COST:        46.50
 2. PAY TYPE : PAY        7. TOTAL CPY:   6      11. DISCOUNT%: 15.000
 3. TRANSFER : Y          8. PRIORITY : RUSH     12. TAX %    :  8.000
 4. CLM CODE : DFLT       9. CURRENCY : CDN      13. ADDED CHG:         0.00
 5. REQUESTOR: C. Smith                          14. CONDITION: OPEN
15. VENDOR   : Please supply ASAP
    NOTE     :


Options:    Description of selected option
  File   # line   Line by line   Bibliographic   Allocation   Notes   Status
  Conditions   Serial Publication   Vendor inquiry   Prior screen   ? Help
  Exit
```

Selecting Menu Items

The ADVANCE modules are menu-driven. Menu screens which list available sub-menus or functions are offered at the highest levels of the module. There are two ways to select a menu item.

Menu Item Number

To select a menu item, you may enter the item's reference number on the menu and <ENTER>. For example, to select the Serials Module on the ADVANCE MAIN MENU, enter the number 5 and <ENTER>; similarly, to select the Vendor Maintenance Menu on the SERIALS CONTROL MAIN MENU, enter the number 4 and <ENTER>.

Screen Identifiers

Each menu item also has a short alphabetic name, called a screen identifier. For example, the Publications Pattern Function, an item listed on the SERIALS CONTROL MAIN MENU, has the identifier PUBM. You can enter the identifier instead of the menu item number on this menu.

Furthermore, you do not have to be on the menu that lists the function when you enter the screen identifier — you can enter the screen identifiers on any menu in the module to go **directly** to the screen you want, skipping any intermediate menus.

Selecting Screen Options

Many non-menu screens have a list of options at the bottom. The way these options are presented depends on whether or not the "option bar" feature is turned on for your particular ADVANCE module (e.g. Serials) or your terminal's port. (This feature is controlled by the system administrator at a setup table — see the *Utilities Management Guide*.)

All sample screens in this guide show option lines with this feature turned on.

Option Bar

If the "option bar" feature is turned **on**, the option line will look something like the following, with one of the options highlighted and a brief description of it shown on the first line.

```
Options:     Get more information
 Check in    Holdings    Claims    Order detail    Forward    Backward
 Prior screen    ? help    Exit
```

To select an option:

1. move the highlighted bar in any of three ways:

    • press an arrow key

    • press the space bar

    • type the first (capitalized) letter of the option. If more than one option begins with the same letter, type the letter a second time to proceed to the second option.

2. and then <ENTER> to execute it.

Option Code

If the "option bar" feature is turned **off**, the option line will look something like the following, with a code (or "command") shown to the left of each option.

```
Options:                      <ENTER> = scroll options
 C = Check in    H = Holdings    CL= Claims        O = Order detail
 F = Forward    B = Backward    P = Prior screen    ? = ? help
```

To select and execute an option, enter the option's code and <ENTER>. For example, enter CL and <ENTER> for *Claims*.

Scrolling

If the system does not have enough room to list all options at once, you can <ENTER> to scroll forward in the list. For example, the previous sample display will change to:

```
Options:                        <ENTER> = scroll options
 F = Forward    B = Backward   P = Prior screen   ? = ? help
 E = Exit
```

and then to:

```
Options:                        <ENTER> = scroll options
 E = Exit
 C = Check in   H = Holdings   CL= Claims         O = Order detail
```

and then finally back to the original display.

Editing in Data Fields

Many screens have fields into which you can place the cursor to add or change data. These fields are usually the numbered fields.

Single-field Access

To access a particular field, select the *# line* option and type the field's reference number. Afterward, you can leave the field and return to the option line by <ENTER>.

Line-by-Line, Multi-field Access

To access all the screen's fields, one after another, instead select the *Line by line* option; this places the cursor in the screen's first field. <ENTER> takes you to the next field rather than down to the option line.

When you add a **new** record, the system displays a screen with most or all of the fields left blank and automatically puts you into line-by-line entry mode.

Commands

The commands you can use to edit text or display help within a field are described in the following table.

Use the Back Space key and type over existing text, or use the <ESC> commands, when necessary. Be careful about using **arrow keys** for this purpose because they work differently on different types of terminals.

NOTE: The library might have different commands defined for some functions, such as <ESC>OO rather than <ESC>O for the insert/over-type mode toggle. If necessary, ask your system manager or Geac Customer Support, who can check the ADV.DEFINE.CURSOR file.

Enter	Description
<ENTER>	To leave the current field as is and **proceed**, just <ENTER>. In line-by-line mode, the system places the cursor at the next field; otherwise, it places the cursor down at the option line.
(blank)	To leave the current field as is and send the cursor **down to the option line**, even in line-by-line mode, enter a blank at the beginning of the field and <ENTER>.
.	To leave the current field as is and **go back** one field, type a period at the beginning of the field and <ENTER>. In line-by-line mode, the system places the cursor back at the preceding field; otherwise, it places the cursor down at the option line.
#	To **clear** the current field and proceed, type a number sign at the beginning of the field and <ENTER>. In line-by-line mode, the system places the cursor at the next field; otherwise, it places the cursor down at the option line.
?	For library-defined **help** on the field, type a single question mark at the beginning of the field and <ENTER>.
??	At fields which take a setup code as the value, you can have the system display the **list of valid codes**. Type two question marks at the beginning of the field and <ENTER>. For example, typing ?? in the *CHRONOLOGY CODE* field of the PUBM - PUBLICATION PATTERN screen causes the system to superimpose the CHRONOLOGY CODE - (CHRN) table. If you wish, you can assign one of the listed Chronology Codes to the field by entering the code's reference number at this table before returning to the original screen.
<ESC>A	ErAse character under the cursor (the cursor moves to the left).
<ESC>B	Tab Backwards within the field.
<ESC>D	Delete character under the cursor (the cursor does not move).
<ESC>H	Go to the beginning of the field (Home).
<ESC>I	Insert (paste) text from your preceding deletion/capture in the field.
<ESC>L	Go to the end of the field.
<ESC>O	Toggle between insert and Overtype modes.

Enter	Description
<ESC>P	For some fields, the system can only show the first line of information stored in the field. (If there is more text than can be shown, the system displays a plus sign, +, at the end of the line.) If the system does not automatically display and allow you to edit this text when you access the field, use this command to open an **edit window**. See the next section for a list of window editing commands.
<ESC>Q	Delete (and capture) text to the beginning of the field.
<ESC>R	Restore the field (undo changes).
<ESC>Z	Delete (and capture) text to the end of the field.

<ESC> Commands

1. Press the keys one after another rather than together. To use "<ESC>E", for example, press the Escape key, release it, and then press the "E" key.

2. Enter characters in upper or lower case, as you wish. For example, <ESC>h is equivalent to <ESC>H.

For convenience, some libraries have set up **function keys** to take the place of the commands listed in the table.

Editing in Windows

The following table lists the commands required for editing text within a field window. A window is a temporary workspace for a field in which you may enter or edit several lines or "pages" of data and use some special editing commands. You may also use the arrow, Tab, and Back Space keys as usual.

NOTE: The library might have different commands defined for some functions, such as <ESC>OO rather than <ESC>O for the insert/over-type mode toggle..

Enter	Description
<ESC>A	erAse character under the cursor (the cursor moves to the left)
<ESC>B	tab Backwards
<ESC>D	Delete character under the cursor (the cursor does not move)
<ESC>E	Exit from the window (and save changes)
<ESC>F	reFormat the contents of the window
<ESC>H	go to the beginning of the line (Home)
<ESC>I	Insert (paste) text from your preceding deletion/capture
<ESC>L	go to the end of the Line
<ESC>M	go to the bottoM of the window
<ESC>O	toggle between insert and Overtype modes
<ESC>P	go to the next Page; oPen a window
<ESC>Q	delete (and capture) text to the beginning of the line
<ESC>R	Restore the line (undo changes)
<ESC>S	Split the line into two lines
<ESC>T	go to the Top of the window
<ESC>U	go Up to the previous page
<ESC>Z	delete (and capture) text to the end of the line

\<ESC\> Commands

1. Press the keys one after another rather than together. To use "\<ESC\>E", for example, press the Escape key, release it, and then press the "E" key.

2. Enter characters in upper or lower case, as you wish. For example, \<ESC\>h is equivalent to \<ESC\>H.

For convenience, some libraries set up **function keys** to take the place of the commands listed in the table.

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Edit Functions

Edit Function Keys

Key	Function
Arrows	Move the cursor around a space at a time on tag or subfield.
Tab	Moves right, field, indicators and subfield on tag or subfield.
<ENTER>	Moves down a field at a time or places cursor at the subfield designation when pressed at the end of a line of text. If used on the middle of text line, deletes the remainder of the line.
Space bar <ENTER>	Returns the option line. If you are cataloguing in non-MARC mode, <space bar> on a numbered field takes you to the next field.
#	Deletes a tag or subfield as well as its contents.
ESC 1	Authority Hot Key (within authority-controlled tag).
ESC 2	Move Tag/Subfield to another part of the record. Cursor must be on a tag or subfield.
ESC 3	Copy Tag/Subfield to another part of the record. Cursor must be on a tag or subfield.
ESC 4	Information toggle. Cursor must be on a tag or subfield.
ESC 5	Insert Tag/Subfield After. Cursor must be on a tag or subfield. If you are cataloguing in non-MARC mode, the system will insert a copy of the current tag/subfield after the current tag.
ESC 6	Insert Tag/Subfield Before. Cursor must be on a tag or subfield. If you are cataloguing in non-MARC mode, the system will insert a copy of the current tag/subfield before the current tag.
ESC A	Backspace (delete under cursor). Use in text line or window mode.

Edit Function Keys (Continued)

Key	Function
ESC B	Backward tab. Use in text line or window mode.
ESC D	Delete character. Use in text line or window mode.
ESC E	Exit from window. Use in text line or window mode.
ESC F	Reformat window contents. Use in text line or window mode.
ESC H	Move to beginning of line. Use in text line or window mode.
ESC I	Insert deletion buffer. Use in text line or window mode.
ESC L	Move to end of line.
ESC M	Move to bottom of window. Use in text line or window mode.
ESC O	Insert/overlay toggle. Use in text line or window mode.
ESC P	Opens a text editing window (Only works when cursor is within a subfield.).
ESC Q	Delete to beginning of line. Use in text line or window mode.
ESC S	Cut line or split a line within a window. Use in text line or window mode.
ESC R	Restore a line.
ESC T	Move to top of window. Use in text line or window mode.
ESC U	Move to previous page. Use in text line or window mode.
ESC Z	Delete to end of line. Use in text line or window mode.

Note: Escape commands are not case sensitive.

Edit Function Keys for Cataloguing in Non-MARC MODE

Key	Function
!, E, e	Return to option line.
x	Explode the current tag/subfield definition to contain **all** of the subfields defined in the current workform.

Edit Functions

Function	Key(s)	Description
Activate Command Mode	Space Bar	Use the space bar to exit from edit mode and display the option lines on the screen.
Backspace	Backspace or ESC A	Deletes the character under the cursor, then moves the cursor one character to the left.
Backward Tab	ESC B	Moves the cursor one tab position to the left. Use in window mode.
Bottom of Window	ESC M	Moves the cursor to bottom of the window. Use in window mode.
Copy	ESC 3	Allows the cataloguer to copy the current tag/subfield to a new location in the record (display). The system will prompt for the insertion point, i.e., the tag following which the cut tag/subfield will be inserted. If there is more than one occurrence of the insertion point, the system will prompt for the number of the occurrence following which the tag/subfield will be inserted.

The system also allows you to make multiple copies of a tag. Enter the number of copies after the prompt: How many copies of this tag?. The default is 1. |
Cursor Home	ESC H	Moves the cursor to the beginning of the line.
Cursor Movement	Arrow Keys	Use the arrow keys to move the cursor around the screen.
Delete to Beginning of Line	ESC Q	Deletes all characters from the cursor left to the beginning of the line.
Delete Character	ESC D	Deletes the character at the current cursor position.
Delete to End of Line	ESC Z	Deletes all characters from the cursor right to the end of the line.
Delete Tag/ Subfield	#	Deletes the tag or subfield at the current cursor position.
Enter Window Mode	ESC P	The window provides a separate area where the data for a field can be entered or modified, before being inserted into a field. The cursor must be at a subfield to invoke window mode.

Edit Functions (Continued)

Function	Key(s)	Description
Hot Key	ESC 1	Allows the cataloguer to search the authority records for a correct entry for an authority-controlled field.
Information Toggle	ESC 4	Turns the display of the tag/subfield information lines on or off. The information lines display tag/subfield name, authority information, valid subfields, or entries.
Insert After	ESC 5	Allows the cataloguer to insert a tag or subfield after another tag or subfield in a record. The new tag or subfield is inserted immediately below the current cursor position. An inserted tag is numbered 000. An inserted subfield creates a blank line.
Insert Deletion Buffer	ESC I	Inserts the contents of the deletion buffer at the current cursor position. The deletion buffer contains the most recent data deleted using delete to end of line function. Use in window mode.
Insert Before	ESC 6	Allows the cataloguer to insert a tag or subfield before another tag or subfield in a record. The new tag or subfield is inserted immediately above the current cursor position. An inserted tag is numbered 000. An inserted subfield creates a blank line.
Insert/Overlay Toggle	ESC O	Changes the edit mode from insert to overstrike and back to insert. Allows characters to be inserted (insert mode) or overwritten (overstrike mode) in a subfield or in the window.
Move	ESC 2	Allows the cataloguer to move the current tag/subfield to a new location in the record. The system will prompt for the insertion point, i.e, the tag following which the cut tag/subfield will be inserted. If there is more than one occurrence of the insertion point, the system will prompt for the number of the occurrence following which tag/subfield will be inserted.
Move Cursor to End of Line	ESCL	Moves the cursor right to the end of the line.
Page Up	ESC U	Moves the cursor to the previous page in the window. Use in window mode.
Reformat Window	ESC F	Reformats and redisplays the contents of the window. Use in window mode.
Restore Line	ESC R	Restores line to its original contents.
Split Line	ESC S	Splits a line in two by placing the right truncated portion on the next line. Use in window mode.
Tab to Field	Tab	Moves the cursor one field at a time; from tag to indicator to subfield.

Edit Functions (Continued)

Function	Key(s)	Description
Top of Window	ESC T	Moves the cursor to the top of the window. Use in window mode.
Window Exit	ESC E	Exits the window mode and writes the data in the window to the current subfield.

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MARC Diacritics

The ability to catalogue foreign-language materials requires ADVANCE to have the capability to include diacritics and special characters in the MARC character set.

Diacritics display and printing requires either specific software or hardware to accommodate the needs of the extended character set. Diacritics can be displayed by using either:

• LTS software running on a PC, or

• a diacritics terminal.

For non-diacritics terminals, diacritics are stripped for display. For input from non-diacritics terminals, the mnemonic method has to be used.This chapter describes how ADVANCE translates these characters, both for display and in filing.

This chapter also contains tables identifying diacritics by name, by mnemonic, and by hexadecimal value.

MARC Character Set

The MARC character sets ASCII (ANSI X3.4) and ANSEL (ANSI Z39.47) include many diacritics (sometimes called accents) and special characters to accommodate library cataloguing of foreign-language materials, both in the national character sets for Roman alphabet-based languages such as German or Turkish, and in Romanized form for languages such as Russian or Chinese.

Diacritical marks or diacritics are stored in the MARC format as separate characters before the letters that they modify. When diacritics appear both below and above a letter, the normal convention is to place the mark(s) which appear below the letter first, followed by the mark(s) which appear above the letter. In some languages which use diacritic marks very heavily (e.g., Vietnamese), further conventions apply.

These diacritic conventions are used even for portions of some letters which are not properly diacritical marks at all. For example, the ñ is a separate letter in Spanish. Similar instances of characters which are taken apart in the MARC character set exist for the Scandinavian alphabets, some Eastern European languages, etc.

In addition to those portions of characters similar to those in the standard Roman alphabet which are divided into the standard character and one or more modifiers, the character set also includes some special characters such as the Scandinavian Ø, the Icelandic *thorn*, Anglo-Saxon Eth (or Edh), and the patent mark, which are not represented on ordinary keyboards and cannot be displayed on standard computer terminals.

ADVANCE Displays

ADVANCE will transmit full MARC diacritics and special characters to terminals capable of displaying them. However, the conventions for translating special characters which are described below are always used for sorting and filing.

For standard ASCII terminal input and output, two substitution conventions are employed. For cataloguing input and display, the series of mnemonics discussed below under *Cataloguing Display* are used to uniquely describe each diacritic and special character. For online catalogue input and display, diacritics are stripped, but special characters are

displayed and filed as their closest Roman alphabet equivalents, as discussed under *Online Catalogue Display.*

Filing Order

There is no agreed-upon international standard for filing. Even most Roman alphabet languages have their own variations of the basic Roman alphabet filing order.   Since libraries have to interfile names and titles in many different languages in their catalogues, a number of filing schemes have been developed. The filing of browse lists and summary displays in ADVANCE is based on the *ALA Filing Rules* (Chicago: American Library Association, 1980) which were designed specifically for automated library catalogues.

In looking for names or titles with letters not in the English alphabet, remember that many letters in other Roman alphabets are often broken up into English letters and diacritics in the MARC format. This means that they do not file the same way that they would in a catalogue filed in their own language's alphabet.

Diacritics are ignored in filing, while modified letters and special characters are filed as their closest English equivalents.   The last table, titled *Online Catalogue Display*, shows all substitutions made by ADVANCE for filing and online catalogue display purposes.

After diacritics and special characters have been ignored or converted, apostrophes (as in *L'Enfant*) are ignored, punctuation and spaces are treated as blanks or spaces, and the headings are sorted word by word.

The same *normalization* performed on diacritics and special characters for filing also applies to keywords. For example, as the *Online Catalogue Display* table indicates, the only way to retrieve a keyword with an Anglo-Saxon Eth is to key an English letter *d*.

Cataloguing Display

ADVANCE translates diacritics and special characters into unique character sequences to allow cataloguers using ASCII terminals to display them in existing records and add them to new or modified records. In browse lists and summary displays, the online catalogue conventions are used. These conventions are used only for display and input. Filing in browse lists and summary displays follows the conventions described in *Filing Order*, and in *Online Catalogue Display*.

Mnemonic Sequences

Each diacritic and special character display sequence consists of a backslash (\) followed by a two-character mnemonic. For example, the uppercase digraph Æ is translated to \AE for display. Similarly, if a cataloguer keys \AE, the system will translate it into the internal computer code (hexadecimal value) for Æ when it stores it in the MARC record.

The mnemonic sequences are shown in three different orders in the tables at the end of this document, first sorted by mnemonic, second by name of the diacritic, and third by ASCII/ANSEL hexadecimal value.

Greek Characters

The MARC character set supports entry and display of three Greek characters through use of an escape sequence. In ADVANCE, keying \GO will turn the Greek set on, and \GF will turn it off. The Greek characters: *Alpha (α)*, *Beta* (β), and *Gamma* (γ), are represented within the escape sequence by the lowercase Roman letters: a, b, and c. For example to enter *Alpha*, key *\GOa\GF*. The Greek letters stored in the MARC records are displayed using the same escape sequences.

Superscripts and Subscripts

Any character in the MARC character set can be entered as a superscript or subscript by using the proper escape sequence. Keying \SPO and \SPF will start and end a superscript sequence, while\e\^SBO and \e\^SBF will start and end a subscript sequence. For example, keying the character sequence H\eSBO2\eSBFO will produce H_2O. The same escape sequences are used for cataloguing displays.

Modifying Cataloguing Displays

In ADVANCE, a library may easily change the mnemonics assigned to the individual MARC diacritics and special characters to reflect any local

usages. Since the mnemonics are used only for input and output, and the actual MARC characters are stored in the records, changing the mnemonics used in cataloguing has no effect on the library's MARC database.

However, the library should not define new MARC characters if it ever intends to share records with other libraries, since this could at minimum require reprocessing at some future date to strip out or convert any non-standard characters.

Online Catalogue Display

The following conventions are used for sorting (filing), display and search input in ADVANCE online catalogue displays on ASCII terminals. The sole exception is the full MARC record display, which uses the cataloguing conventions.

Diacritics

Diacritics are ignored in sorting and display, and should not be included in search input. However, if an apostrophe (single quote) or double quote is inputted in a search string as itself or as a substitution for a diacritic, the search will succeed since both characters are removed during search normalization. Thus, searching for *O'Henry* will find entries sorted as *OHENRY*, searching for *L'vov* will find entries sorted as LVOV, etc. All punctuation marks other than apostrophes and quotes are treated as blanks for searching purposes.

Special Characters

Special characters are translated into their closest displayable, sortable, and searchable equivalents. For example, the Scandinavian Ø displays as *O* and diagraph letters are displayed as their two-letter equivalents. Modified letters sort as their unmodified equivalents in browse lists and summary displays, and are inputted as such for retrieval purposes. The last table in this document shows the ADVANCE substitutions for special characters and their impact on filing and search input.

Greek Characters

The MARC escape code sequences for Greek characters are stripped from online catalogue displays, so that Alpha, Beta, and Gamma display, sort, and are inputted for searching as lowercase a, b, and c.

Superscripts and Subscripts

The escape sequences for superscripts and subscripts are stripped so that they are displayed, sorted, and searched as normal characters. Thus, $E=MC^2$ will display as E=MC2.

Cataloguing Display by Mnemonic

Mnemonic	Diacritic Name	Mnemonic	Diacritic Name
\(pl\^\(mi	Plus or minus	\LL	Left Ligature
\AC	Acute	\LT	Left tilde
\AE	\(AE uppercase	\MA	Macron
\ae	\(ae lowercase	\MF	Musical flat
\AG	Angstrom	\MZ	Miagkyi znak
\AL	Alif	\O/	\(O/ uppercase
\AY	Ayn	\o/	\(o/ lowercase
\BP	British pound	\OE	\(OE uppercase
\BR	Breve	\oe	\(oe lowercase
\CA	Candrabindu	\OH	O hook uppercase
\CB	Circle below letter	\oH	o hook lowercase
\CC	Comma centered high	\P/	Thorn uppercase
\CF	Circumflex	\p/	thorn lowercase
\D/	D with crossbar upper	\P?	Pseudo question mark
\d/	d with crossbar lowercase	\PM	Patent mark
\DA	Double acute	\RC	Right cedilla
\DB	Dot below letter	\RH	Right hook
\DD	Double dot below letter	\RL	Right ligature
\DM	Dot in middle of line	\RT	Right tilde
\DU	Double underscore	\SD	Superior dot
\ET	Eth (or Edh)	\Ti	Turkish \(ui without dot
\GR	Grave	\TL	Tilde

Cataloguing Display by Mnemonic (Continued)

Mnemonic	Diacritic Name	Mnemonic	Diacritic Name
\HA	Hacek	\TZ	Tverdyi znak
\HC	High comma off center	\UH	U hook uppercase
\L/	L slash uppercase	\uH	u hook lowercase
\l/	l slash lowercase	\UM	Umlaut (dieresis)
\LC	Left cedilla	\UP	Upadhmaniya
\LH	Left hook	\US	Underscore

Cataloguing Display by Name of Diacritic

Mnemonic	Diacritic Name	Mnemonic	Diacritic Name
\AC	Acute	\LC	Left cedilla
\AE	\(AE uppercase	\LH	Left hook
\ae	\(ae lowercase	\LL	Left ligature
\AL	Alif	\LT	Left tilde
\AG	Angstrom	\LL	Ligature left half
\AY	Ayn	\RL	Ligature right half
\BP	British pound	\MA	Macron
\BR	Breve	\MF	Musical flat
\CA	Candrabindu	\MZ	Miagkyi znak
\LC	Cedilla (left)	\O\/	\(O/ slash uppercase
\AG	TCircle above letter (Angstrom)	\o\/	\(o/ slash lowercase
\CB	Circle below letter	\OE	\(OE uppercase
\CF	Circumflex	\oe	\(oe lowercase
\CC	Comma centered high	\OH	O hook uppercase
\HC	Comma off center high	\oH	o hook lowercase
\D\/	TD with crossbar uppercase	\PM	Patent mark
\d\/	Td with crossbar lowercase	\+ —	Plus or minus
\UM	Dieresis (Umlaut)	\L\/	Polish slash L uppercase
\AE	Digraph \(AE uppercase	\l\/	Polish slash l lowercase
\ae	Digraph \(ae lowercase	\BP	Pound (British)
\OE	Digraph \(OE uppercase	\P?	Pseudo question mark
\oe	Digraph \(oe lowercase	\RC	Right cedilla

Cataloguing Display by Name of Diacritic (Continued)

Mnemonic	Diacritic Name	Mnemonic	Diacritic Name
\DB	Dot below letter	\RH	Right hook
\DM	Dot in middle of line	\RL	Right ligature
\DA	Double acute	\RT	Right tilde
\DD	TDouble dot below letter	\O\/	Scandinavian \(O/ uppercase
\LL	Double ligature left half	\o\/	Scandinavian \(o/ lowercase
\RL	Double ligature right half	\PM	Subscript patent mark
\LT	Double tilde left half	\SD	Superior dot
\RT	Double tilde right half	\TL	Tilde
\DU	Double underscore	\P\/	Thorn uppercase
\ET	Eth (or Edh)	\p\/	Thorn lowercase
\GR	Grave	\Ti	Turkish \(ui without dot
\HA	Hacek	\TZ	Tverdyi znak
\CC	High comma centered	\UH	U hook uppercase
\HC	High comma off center	\uH	u hook lowercase
\P\/	Icelandic thorn uppercase	\UM	Umlaut (dieresis)
\p\/	Icelandic thorn lowercase	\US	Underscore
\L\/	L slash uppercase	\UP	Upadhmaniya
\l\/	l slash lowercase	\IE	Inverted exclamation mark
\IQ	Inverted question mark	\MS	Musical sharp
\CM	Copyright mark	\PC	Phonograph record mark
\SI	script L	\DS	Degree sign
\+ —	plus\minus sign		

Because the names used for diacritics vary (e.g., umlaut and dieresis), many diacritics appear more than once in this table.

Cataloguing Display by Hexadecimal Value †

Hexadecimal Value	Mnemonic	Diacritic Name	Hexadecimal Value	Mnemomic	Diacritic Name
A1	\L/	Polish slash L uppercase	B1	\l/	Polish slash l lowercase
A2	\O/	Scandinavian \(O/ uppercase	B2	\o/	Scandinavian \(o/ lowercase
A3	\D/	TD with crossbar uppercase	B3	\d/	Td with crossbar lowercase
A4	\P/	Icelandic thorn uppercase	B4	\p/	Icelandic thorn lowercase
A5	\AE	Digraph \(AE uppercase	B5	\ae	Digraph \(ae lowercase
A6	\OE	Digraph \(OE uppercase	B6	\oe	Digraph \(oe lowercase
A7	\MZ	Miagkyi znak	B7	\TZ	Tverdyi znak
A8	\DM	Dot in middle of line	B8	\Ti	Turkish \(ui without dot
A9	\MF	Musical flat	B9	\BP	British pound
AA	\PM	Subscript patent mark	BA	\ET	Eth (or Edh)
AB	\+ —	Plus or minus	BC	\oH	o hook lowercase
AC	\OH	O hook uppercase	BD	\uH	u hook lowercase
AD	\UH	U hook uppercase	C0	\DS	Degree sign
AE	\AL	Alif	C1	\SI	Script L
B0	\AY	Ayn	C2	\PC	Phonograph record mark

Cataloguing Display by Hexadecimal Value † (Continued)

Hexadecimal Value	Mnemomic	Diacritic Name	Hexadecimal Value	Mnemomic	Diacritic Name
C2	\PC	Phonograph record mark	EC	\RL	Ligature second half
C3	\CM	Copyright mark	ED	\HC	High comma off center
C4	\MS	Musical sharp	EE	\DA	Double acute
C5	\IQ	Inverted question mark	EF	\CA	Candrabindu
C6	\IE	Inverted exclamation mark	F0	\LC	Cedilla
E0	\P?	Pseudo question	F1	\RH	Right hook
E1	\GR	Grave	F2	\DB	Dot below character
E2	\AC	Acute	F3	\DD	Double dot below character
E3	\CF	Circumflex	F4	\CB	Circle below character
E4	\TL	Tilde	F5	\DU	Double underscore
E5	\MA	Macron	F6	\US	Underscore
E6	\BR	Breve	F7	\LH	Left hook / tail
E7	\SD	Superior dot	F8	\RC	Right cedilla
E8	\UM	Umlaut or dieresis	F9	\UP	Upadhmaniya
E9	\HA	Hacek	FA	\LT	Double tilde first half
EA	\AG	Angstrom or circle above	FB	\RT	Double tilde second half
EB	\LL	Ligature first half	FE	\CC	High comma centered

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† MARC records are encoded using ASCII (American Standard Code for Information Interchange — ANSI X3.4) and ANSEL (American National Standard for Extended Latin Alphabet Coded Character Set for Bibliographic Use — ANSI Z39.47), both established by the American National Standards Institute (ANSI).

In ADVANCE internal storage, Hex FE is relocated to He 87 because the Pick operating system uses Hex FE as a reserved character. It is reconverted back to Hex87 for production of MARC format tapes.

Online Catalogue Display

Special Character	Graphic	Substitution Character(s)
\(AE digraph	AE	Upper or lowercase AE
D with crossbar	D	Upper or lowercase D
O hook	O	Upper or lowercase O
\(OE digraph	OE	Upper or lowercase OE
Polish slash L	L	Upper or lower case L
Scandinavian \(O/	O	Upper or lowercase O
Turkish \(ui (no dot)	i	Lowercase i
U hook	U	Upper or lowercase U

The substitutions for characters are used for filing and must be input as part of search strings.

D

Glossary

This glossary explains many of the terms you may encounter in the documentation or while performing system activities.

Words shown in *italics* are defined elsewhere in the glossary.

A

AACR2
: Anglo-American Cataloguing Rules, version 2. These are the rules that form the "bible" of cataloguing procedure as they relate to the construction of catalogues and other lists.

access level
: A number between 0 and 99. The higher the number, the more you are allowed to do. See also *priority level*.

access point
: An entry point into a catalogue. A heading by which a bibliographic record may be retrieved.

accession number
: A number assigned by the library to an individual *bibliographic item* when it is added to the library's collection. In ADVANCE, the accession number is usually replaced by assigning a *barcode* to the item. Barcodes themselves may constitute a form of accession number, if they are sequential.

account
: Accounts are used within the PICK system software. ADVANCE is an account in SYSPROG.

accounts receivable
: The Circulation process by which patron fines are paid, created, or assessed and other financial transactions are performed.

Acquisitions module
: The ADVANCE module used to order and keep track of the purchase of items for a library, both serials and monographs.

added entry	An entry, other than a subject entry and additional to the main entry, under which a bibliographical entity is represented in a catalogue.
ALA character set	An extended 8-bit ASCII character set defined for MARC records and adopted by the American Library Association. Of the 256 characters allowed for by this code, US/MARC defines 208.
application	A software program or set of programs that uses the computer as a tool, as opposed to the software necessary to run the computer.
archive tape	Tape from a *bibliographic utility* (*OCLC*, *WLN*, *RLIN*, or *UTLAS*) which are released to each library and contain a copy of that library's records from the utility's database. Tapes are produced regularly.
ASCII	An acronym for "American Standard Code for Information Interchange". A standard 7-bit code representing up to 128 characters. The ASCII code is used in computer communications.
attach	To connect a job or terminal to the computer in such a way that they can communicate. Also, to define communications characteristics for a terminal.
authoritative form	The form of a heading that has been chosen as the standard form to be used in all bibliographic records.
authority control	A way of handling and standardizing bibliographic information using "see" and "see also" references.
	The classic example of a "see reference" is Mark Twain vs. Samuel Clemens. The library decides which of these names for the same author will be the "established" form — say, Mark Twain. If users look for "Clemens, Samuel", they will find the reference, "see Twain, Mark".
	"See also references" are generally used in subject searches. A user who looked under the subject of "Home" might find "see also Family".
	Authority control refers to the sum of the library's cataloguing decisions as to which bibliographic elements will be established form headings, rejected form headings, and related headings.
authority file	Records of the correct forms of names, series, or subjects used in the catalogue. The purpose of the authority file is to keep entries uniform.
authority hot key	The function key a user can press to browse and retrieve an authority heading for the MARC field they are cataloguing.

B

backup
An exact copy of a primary unit that can be used in place of the primary unit in case the primary unit fails. Usually 'backup' refers to copies of ADVANCE software and the library's data files which are kept on tape. If the disk versions of these files get damaged, the files can be restored from the backup versions on tape.

barcode
A series of printed lines and spaces representing numbers, letters, or other symbols. Barcodes are not eye readable. The format of the barcode varies from one manufacturer to another. Geac equipment can work with several barcode formats, including 'CODABAR' and Code 39.

barcode reader
A device for reading barcode labels into a system. Generic term for 'laser scanner' or 'lightpen'.

batch
A collection of commands and input held in an editor file. Similar to a program, but relatively simple. Batches feed instructions to the computer without requiring the presence of an operator. When you execute a batch, it usually performs several control console commands and may run several programs in a pre-assigned order.

baud rate
Also simply "baud". A standard unit, in bits per second, used to express the data transmission capability of lines, terminals, and interface equipment.

bibliographic item
A document or set of documents in any physical form, published, issued, or treated as an entity, and as such forming the basis for a single bibliographic description. Contrast with *physical volume* and *copy*.

bibliographic record
In ADVANCE, the MARC format record that describes one bibliographic item. For example, if the library owns 10 copies of a three-volume edition of "War and Peace", it will describe them in one Bibliographic Record with 30 items or pieces in the Item File — 10 for each of the separate volumes.

bibliographic utility
An online processing centre whose services are based on a machine-readable database of catalogue records. The main North American utilities are *OCLC*, *WLN*, *UTLAS*, and *RLIN*.

binding entry
An entry in a bibliographic record to indicate that an item is physically bound with one or more other items. Used with books bound together, AV kits, etc.

bit	A binary digit. A data field that has only two possible values, 0 or 1 — that is: NO or YES; OFF or ON.
blind heading	This is an authorized heading for which no authors or subjects exist in the bibliographic database. In general, blind headings do not appear in the Online Catalogue. Note, however, that blind, non-provisional, topical subject headings do appear in the Online Catalogue. All blind headings can be searched for in the Cataloguing module.
blind reference	This is a reference to an authorized heading that does not exist in the bibliographic database. In general, blind references do not appear in the Online Catalogue. Note, however, that references to blind, non-provisional, topical subject headings do appear in the Online Catalogue.
Boolean searching	A searching technique in which search terms are presented to the system in a particular manner. These terms are operated on with Boolean logic, which means the search terms may be separated by the operators AND, OR, NOT. For example, consider the subject search: COMPUTERS AND CARS. This search would result in the retrieval of a series of items in which both COMPUTERS and CARS formed a subject term.
boot	Short for "boot strap". The operation of loading the initial elements of the 'operating system' into computer memory.
borrower	Known as *patron*.
BOT	Reflective marker to identify the beginning of a tape.
bug	An error in a program or hardware function that causes the function to work incorrectly.
byte	A character of data, normally represented by 8 bits.

C

call number	Alphanumeric code used to identify and locate a particular item on the shelves. Call numbers usually consist of a classification number and author or cutter number; they may also include an accession number. In most systems, the call number also classifies the subject material of the book. Various systems exist - common ones are *LC* and *Dewey*.
CAN/MARC	Canadian version of the MARC format.

carriage return	Indicates the use of the ENTER or RETURN key on the keyboard. Operators use this key to send data to the computer, or to respond to a prompt. Sometimes abbreviated to "<CR>".
Cataloguing module	The ADVANCE module that automates bibliographic and authority control.
cataloguing source number	Unique number assigned by the provider of the cataloguing record: e.g. OCLC, LC.
charge	Known as *checkout*. A function in the Circulation module: the process by which a library item is lent to a patron. To loan a book to a patron is to charge it out to the patron.
checkdigit	A calculated digit added to the end of a number used to validate the correctness of the sequence of digits. Used in *barcodes*, *ISBN*s, and so on.
checkin	1) In the Circulation module, the process of checking returned items in at the circulation desk. Also known as *discharge*.

2) In the Acquisition and Serials modules, *checkin* is the process of receiving an item shipped to the library, and recording the receipt on the system. |
checkout	A function in the Circulation module: the process by which a library item is lent to a patron. To loan a book to a patron is to *charge* it out to the patron.
chronology	Date that identifies an issue of a serial — e.g. "June 1991".
Circulation module	The ADVANCE module that automates circulation functions and transactions.
citation	A display of bibliographic information describing a given work.
CODABAR	A 14-digit *barcode* format that ADVANCE uses.
COM	Acronym for "Computer Output on Microform". Information is recorded on microfilm or microfiche instead of paper.
command	An order telling the system to start, stop, or continue an operation within a function. Commands are usually entered by typing a mnemonic code.

compile	To translate a program from a high-level source language to a machine-executable form.
content designator	The means of identifying data elements and/or of providing additional information about a data element. Content designators consist of tags, indicators, and subfield identifiers.
control characters	Keyboard letters, numbers, or symbols which are entered while the <CONTROL> key is held down. They are not normally printable characters.
control console	A terminal, usually in the computer room, from which the system may be controlled.
conversion	The process of turning machine-readable records in one format into machine-readable records of a different format.
copy	A single piece of a document; a duplicate; an instance of a serial issue. See also *bibliographic item, physical volume*, *piece*, and *copy set*.
copy number	A number assigned by the library to a copy. The number need not be unique. Its usual purpose is to distinguish between different copies of the same title, or different copy sets of the same serial title.
copy set	A duplicate run of issues of a serial; simplistically a "subscription".
copy-specific hold	A hold placed on a specific copy. A copy-specific hold may be used, for example, to capture a particular copy to be sent to the bindery. Contrast with title-level hold.
core	Computer memory, usually measured in megabytes: "MB".
CRT	Cathode Ray Tube screen of a terminal. Also known as VDU (visual display unit).
CSN	Cataloguing Source Number.
cursor	A small square or line on the terminal screen which tells you where the next character you type will appear.
cutter number	Part of the *call number* used to identify the author for filing purposes.

D

database   A pool of data held in computer storage, controlled by a central authority, and available to any application capable of accessing the storage. It is designed to meet the requirements for consistent and current data by many or all of an organization's application systems.

data communication   The transmission of data across geographically separated locations.

data element   The smallest unit of information that is explicitly identified in MARC format. Within a variable field, a data element is identified by a subfield identifier. Within the record label, the directory, and a fixed-length subfield, a data element is identified by its character positions.

date of last use   The date of the last transaction associated with a particular record.

Dewey   Dewey Decimal Classification system, developed by Melvil Dewey.

diacritics   Also "diacritic characters/marks". The marks, such as accents, which appear under or over characters, used to denote a specific sound for a given character. Sometimes used to refer to non-English alphabetic characters as well.

discharge   Known as *checkin*. A function in the Circulation module: the process by which library staff record that a borrowed item has been returned by the patron.

disk   Also "hard disk". A magnetic storage medium, like magnetic tape, but in the form of a platter, similar to a phonograph record.

disk drive   A data storage device that holds, reads from, and writes to *disks*.

diskette   Also "floppy disk". Similar to *disk*, typically used with microcomputers.

DOS   Disk Operating System, for a microcomputer.

download   The data flow from the host computer system **down** to the microcomputer.

E

edit record   The "edit" records are the temporary, work versions of bibliographic records, stored in the Work File. Edit records are not shown in the Online Catalogue.

edition   A new edition of a work, revision. Edition information may modify some but not all of the bibliographic information for a work. According to AACR2, a new bibliographic record must be created for a new edition.

editor   A program that enables the user to create, purge, retrieve and update variable-length record source files.

editor file   A file created using the editor.

enumeration   Numbering that identifies an issue of a serial — e.g. "Vol.3 Pt.A".

EOF   The magnetically recorded mark at the end of a file.

EOT   The reflective marker at the end of a tape attached to the tape surface.

established form   This is the form of a heading that has been chosen as the standard form that should be used in all bibliographic records. Also known as *authoritative form*.

F

F.E.   Stands for "Field Engineer". Also written "FE".

F.E.D.   Also written "FED". Field Engineering Division — the Geac department responsible for maintaining and repairing hardware.

field   1) A MARC "field" is a defined part of a MARC record used to contain only a specific category of data. For example, included in the Bibliographic Record is the Main Entry - Personal Name Field (Tag 100), the Title Statement Field (Tag 245), and the Local Call Number Field (Tag 090). There are two kinds of MARC fields - *variable length* and *fixed length*. Some people use the word "tag" to refer to a MARC field.

2) An area on the screen where you can enter data, or where the system will display information: for example, author, title. Fields often appear on the screen with a descriptive word beside them. For example, the author field usually has "AUT:" or "AUTHOR" beside it.

field separator	A control character used at the end of each *variable field* to separate it from the next.
file	A collection of related records treated as a unit.
	A file is a logical structure which associates a set of items. On a PICK system, files are organized in a hierarchical structure. There are four levels of files: the System Dictionary, a users' Master Dictionary, File-level Dictionaries, and the Data Files. A PICK system can contain any number of files, which can contain any number of data items, limited only by the size of the disk drive.
file structure	The rules of organization that relate records within a file.
fixed-length field	Also "fixed field" and "control field". A MARC field of pre-defined length in a bibliographic record: for example, the Physical Description Field (Tag 007). Fixed-length fields are made up of one or more fixed-length data elements (sometimes called *offset*s).
fixed-length field element	Part of a MARC *fixed-length field* whose length and contents are pre-defined. For example, the language code (character positions 35 to 37) in Tag 008.
fixed-length subfield	A *subfield* whose length is invariant, being determined for all occurrences by provisions of this format. A fixed-length subfield may be defined to contain one or more data elements. Fixed-length subfields may occur in both fixed-length fields (e.g. field 100, subfield ‡a), and variable-length fields (e.g. field 200, subfield ‡z).
frame	Disk drive storage is divided into sections called "frames". Each frame is numbered, giving the system direct access to that particular frame-id or FID. The physical size of a frame is machine-dependent, and limited only by the size of the disk drive.
function	In ADVANCE, "function" refers to each of the possible actions available in the main menus.
	For example, in the Circulation module, "function" refers to an operation available in the online menus: e.g. checkout.
fund	The library can define amounts of money to be encumbered, spent, referred to, and reported on through named "funds" within the Acquisitions module. The term "fund" is used to contrast with external "accounts" which are not system-maintained.

G

GFE   Group Format Error. A GFE typically indicates that the data may be corrupted. Normally GFEs are caused by a sudden power failure.

H

hang   Refers to the situation where the computer does not respond to terminal activity. Usually the result of some kind of fault, either in the software or the hardware.

hold   Sometimes called "reservation". A facility in Circulation referring to the process by which an item not currently available is reserved for the patron. It is normally used when all copies are on loan. When the item becomes available, the library sets it aside for the requesting patron.

holdings   **Piece holdings**: the physical volumes that the library owns of a given work.

Copy holdings: the issues that the library owns of a serial.

Summary holdings statement: a description of the range of copy holdings.

host   The controlling or main computer in a data network.

hot key   See *authority hot key*.

I

imprint   Publisher name, including date and place of publication.

index   A list of data arranged in some order (usually alphabetical) using a special "key" (such as author, title, etc.) which acts as an access point to the database. Indexes facilitate quick access to a large body of data.

index entry   A word, phrase, or number used to locate an item within a specific index.

index key   The term or phrase from a source record which allows you to search for that record - for example, "Twilight Zone", or "Bowie, David".

indicator   A special data element in a MARC variable field. Each US/MARC variable field must have two one-character indicators.

intensity	The brightness of the characters on the screen.
interface	To interconnect devices or systems with different characteristics. Usually involves converting data suitable for one system into a form suitable for a second system. The term can be used as a verb or a noun. It can be applied to a cable or a connector, to a device that performs a conversion operation, or to a conceptual boundary.
interlibrary loan	The arrangement whereby a library system may borrow items from another library system. Either or both of the two libraries may be Geac customers. ILL patron privilege classes and material types should be defined in the Policy Tables.
invoice	An accounting document supplied to the library by a vendor, indicating the character, quantity, price, terms and nature of delivery of goods sold or services rendered. In the Acquisitions module, staff members will create a system record for each invoice received.
I/O	Abbreviation of "input/output".
ISBD	"International Standard Bibliographic Description" — a format for describing bibliographic information.
ISBN	"International Standard Book Number" — an alphanumeric code (with dashes) assigned by some publishers to their works. The same work published in different countries will have different ISBNs.
ISO	Short form for "International Standards Organization".
ISSN	International Standard Serial Number. Similar to ISBN, except for serials.
issue	A publication unit of a serial, usually identified by unique enumeration (numbering) and chronology (cover date).
item	Used variously, in different contexts, to mean *bibliographic item*, *physical volume*, *copy*, or barcoded *piece*.

J

job	Often used as a synonym for "program". A unit of work to be done using the computer. Often accomplished through the use of a batch or program.

journal entry   In the Acquisitions module, a transaction record specifying the transfer of money into or out of one or more funds.

K

KB   Short for "kilobyte" — 1024 *bytes* of memory.

keyword   A word which is used as an access point to the bibliographic record. These words are taken from author, title, and subject, and individually indexed without regard to order of appearance.

L

laser scanner   Device for reading barcodes or OCR labels. See also *barcode reader*.

LC   Short for "Library of Congress". It refers to the Library of the Congress of the United States, a body with some of the characteristics of a national library. Also used to refer to the classification system used by the Library of Congress.

LCSH   "Library of Congress Subject Headings". A subject classification system for cataloguing.

LC Card Number   Sometimes abbreviated to "LCCN". "Library of Congress Control Number" — the number assigned to an item by the Library of Congress production services as a printing control number / inventory number after an item has been catalogued.

LC MARC Records   Records in *US/MARC* format produced by the Library of Congress.

leader   The beginning portion of a MARC record. The leader contains coded information about a record, including record type, bibliographic level, and creation date. The information is stored in a fixed-length format.

library system   Also called "library", or more often, "site". A purchaser of ADVANCE. A library system may consist of a central library, along with its branches and departments. Alternatively, a library system may be a consortium or co-operative. A library system is composed of one or more "agencies" which share the same CPU.

lightpen   The pen-like device attached by a cord to the terminal. It is used to read *barcodes* into the system for operations such as registering new patrons

	to the system, searching quickly and accurately for those already there, or entering a patron or item during a function such as CHECKIN, CHECKOUT, etc.
line	The transmission medium and equipment for carrying speech and/or data between separated locations, usually between host computer and remote terminal.
line printer	The printers used to print reports are often called "line printers", so named because they print one line at a time. Printing speed for line printers is given in number of lines per minute: for example, "600 lpm".
linking	The process of adding holdings information and (in particular) a barcode number for an item to the item's bibliographic record.

Also used in the Reserve Book Room to bring together specific courses with items. |
load	To mount a tape on the tape drive and set it to the load point.
load point	The beginning of the usable portion of a tape. The load point occurs when the tape drive detects a one inch reflector on the tape (the *BOT* mark). A tape at load point may be used as soon as the drive goes online.
local call number	Known as *shelf location*.
local copy number	Known as *copy number*.
log	To record events and their time of occurrence.
log on	See *sign on*.
log off	See *sign off*.

M

magnetic tape	Storage medium for information. Usually used in conjunction with a computer system. Typically, the magnetic tape is 1/2 inch in width, and comes in various lengths.
main entry	In a manual cataloguing system, the primary access point for a biblio-graphic item. Normally the author but sometimes the title.

MARC field   A *fixed-length* or *variable-length field* in a MARC format record.

MARC format   "MAchine Readable Cataloguing" — a standardized communications format for storing and transferring bibliographic and authority cataloguing data records on magnetic tape. A MARC record is composed of a leader, a directory to the fields, fixed length fields, and variable length files. National libraries issue records for various materials in their own versions of MARC: for example, US/MARC, CAN/MARC, UK/MARC.

material type   A category of library materials used in the library. For example, newspapers, adult fiction paperbacks, and video cassettes could all have different material types. The library usually categorizes its materials based on its circulation policies (such as loan period) and the statistical reports desired. Every item is assigned a material type. A two-character code identified by MARC.

master record   Completed bibliographic records, stored in the main bibliographic file, or the main record for binding entry records.

MD or M/DICT   "Master Dictionary" — each user account on the system has a Master Dictionary associated with it. It is structurally similar to all other files on the system. Many things that a user enters at the TCL prompt are contained in the user's Master Dictionary: verbs, procs, connectives, file-names, etc.

menu   A listing of the functions available online that allows a user to choose and perform a variety of actions. The user selects the action by entering certain key(s).

module   An "application" package within the ADVANCE System — examples: the Circulation module, the Cataloguing module.

monograph   Book; contrast with *serial*.

N

non-filing   Words or characters that do not affect sorting. For example, **The Joy of Cooking** is filed under "J" for "Joy", not "T" for "The". "The" is a non-filing word.

non-filing count   A specific number of characters which will be ignored for sorting purposes. Usually applied to the title of a work, and usually counted from the first character in the title. For example, **The Joy of Cooking**,

filed under "J" for "Joy", would have a non-filing count of "4" (the three characters in "The" plus one space). This count is normally placed in one of the indicators of a MARC record.

normalization
To improve the matching and filing of index entries, several "normalization rules" are applied automatically. For example, all letters may be converted to upper case, and some punctuation marks can be converted to blanks or stripped.

note
A type of field or screen display where library staff can enter free text about a patron or item.

notice
In ADVANCE, "notice" generally refers to an item printed by the library, but meant to be circulated outside the library, such as a fine notice, overdue notice, or claim notice (in Acquisitions).

O

OCLC
A bibliographic utility, formerly "Ohio College Library Center", now "Online Computer Library Center". Among other services, it provides a machine-readable database for cataloguing.

OCR
Optical Character Recognition or Reader.

offline
Opposite of *online*.

offset
Another term for fixed-field data elements.

online
"Online" has two meanings:

1. Connected directly to and interacting with a computer.

2. A major program used to make computer interaction easier: for example, the Circulation online.

Online Catalogue
One of the ADVANCE modules, the Online Catalogue is an online query system that automates manual catalogue systems for lookup only. It allows library patrons to search the MARC records database. Patrons can examine bibliographic records, locating items through standard indexes such as subject, title, author, series, keywords, and bibliographic identification numbers.

OPAC
Short for "Online Public Access Catalogue". The ADVANCE OPAC is known as the "Online Catalogue".

operating system	Often referred to as "OS". The set of programs that control the computer and its processing.
operator	The person using a terminal.
order	See *purchase order*.
OS	Short form for *operating system*.
OSI	Stands for "Open System Interconnect." An international standard developed by *ISO* and used for communication between different types of computers. The OSI model defines 7 levels for the interconnect.

P

parity	A system of detecting errors in data transmissions and transfers. By selectively adding a single bit to bit patterns, parity causes the bit patterns to have either an odd number of bits turned On (odd parity), or an even number of bits turned On (even parity).
parity error	Parity errors occur when the bit patterns caused by the system's 'parity' setting are incorrect: for example, when the system detects a "0" but expected a "1". Parity errors imply that one portion of the system has detected a non-recoverable failure by another part of the system.
password	A code which is typed by an operator to sign on to the system or to a module. The password determines the operator's *access level*.
password security	The type of security in which staff passwords are used. The password indicates the operator's access level which, in turn, determines the commands he or she is permitted to use.
patron	Refers to the individuals who use the goods and services offered by a library. Also called "borrower" and "user".
patron agency	The location/library where a patron is registered.
patron class	Known as "patron privilege class".
patron record	The record that describes a patron. The description includes: name, barcode number, address, and other patron-related information.

peripheral	Also "peripheral device". In a computer system, a functional unit that makes and/or receives data transfers. The term includes storage devices (such as tape drives), input devices (such as terminals), and output devices (such as printers).
physical volume	All that is contained in one binding, portfolio, etc., whether as originally issued or as bound after issue. A physical volume does not necessarily coincide with a bibliographic volume, which is characterized by a title page and separate pagination. See also *piece*.
PICK	The operating system and database management system used by ADVANCE.
piece	A barcoded circulation unit, usually corresponding to a physical volume. Each barcoded volume of a monographic bibliographic item is a piece. In ADVANCE, piece control is handled by the Cataloguing module's holdings function.
pointer	A data element which specifies the record-number of a record in a file, or in a related file.
policies	Each library has certain characteristic ways of handling the way it conducts business. These are referred to as "policies". Circulation Setup policies include loan periods, book limits, material types, renewal limits, fine amounts, and so on.
policy parameters	Library policies stated explicitly in the form of sets of values for the Geac-supplied tables, lists of options, and so forth.
policy tables	The tables completed by a library during the installation process. These define the library policies, contain the decisions regarding library options, outline the structure of the system and list the various codes used by the library. Each module has its own set of tables.
port	An interface that connects one or more devices (e.g., terminals, printers) to the computer. Each port has a unique number.
powerfail recovery	The computer's ability to recover from power failures without losing data.
printer	A peripheral device used to provide hard copies of data.

priority level	Refers to a "security level" required to perform a function. There is a level of security associated with each command, ranging from 0 to 99 (highest = most). Synonymous with *access level*.
PROC	PROC is short for stored procedure. PROC allows the user to pre-store a complex series of operations which can be invoked by a single command. Anything which can be done at the TCL level can be accomplished with a PROC.
program	A sequence of machine-readable instructions that a computer can execute. When a program is executed, it performs some function or operation.
project manager	The Geac Project Manager is responsible for liaison between Geac and the individual customer.
prompt	A message from the *operating system* or an *application* program. Prompts appear on the CRT screen, and require a response from the computer operator.
publication pattern	A serial's *enumeration* pattern, *chronology* pattern, and publication frequency pattern, used by the Serials module to predict issues.
purchase alert	A warning that additional copies of a title may be needed. Usually because all copies are missing or because the "hold ratio" for this item (that is, the number of holds compared to the number of active copies) is very high.
purchase order	A record authorizing a vendor to deliver materials or services, usually at a set price, to the library. One or more copies of one or more items can be covered by a single purchase order (sometimes abbreviated "PO").

R

reboot	To perform a second or subsequent *boot*.
recall	To require that a book on loan be returned before the expiry of the due date that was assigned when the charge was made.
recompile	To perform a second or subsequent *compile* of a program.
recon	Retrospective conversion of bibliographic records into machine-readable format. This process typically occurs when a library purchases a

library automation system but still has some bibliographic records that were never put into machine-readable format.

record   To make computer processing easier, data items are brought together to form a unit called a "record". A group of records makes up a "file".

recovery   The process of returning a system to operable condition following a failure.

reel   A magnetic tape volume or the tape and the spool on which it is wound.

registration   The process of recording information about individual patrons for the Circulation system, and especially of assigning barcode numbers to those patrons. Usually, "patron registration" applies to the initial entry of this information onto the system.

release   Release refers to a particular version of a package of software: for example, Release 5.0 of ADVANCE.

remote   A term applied to a device or operation that is geographically-separated from a computer but communicates with it.

renewal   The process whereby a borrowed item is checked out again to the same patron, effectively extending the loan period.

report   A result of processing in which data from various data fields is selected and presented in a particular way to provide certain pre-defined information to the user. The hard copy of this data is printed as a "report".

reserve   A "reserve collection" is also known as "short loan collection". In academic libraries, a type of material in high demand that has short loan periods assigned to it. Reserve is often applied to required course reading materials, or to new or topical items.

The term "reserve" is sometimes used by public libraries to mean *hold*.

reserve book room   "RBR" is a function within the Circulation module designed to handle high-use materials in the reserve collection, often items associated with a course. It allows the user to enter instructor and course information, and links titles with the appropriate courses.

reserve recall   An item is recalled for the Reserve Book Room.

response time	Used in connection with computer systems. The amount of time it takes for an online system to give data requested of it. It is measured as the amount of time between the point when a user presses the ENTER or RETURN key and the point when the first character of response appears on the screen.
restore	To replace something which has been removed, deleted or damaged. Restoration is part of recovery, and usually refers to the process of replacing disk files with the backup copies on tape.

S

scanning	Also "wanding". The act of drawing the lightpen across a barcode to read the barcode into the system.
security level	The level assigned to each function, command, and override in order to restrict its usage. Only those functions and commands having a priority level at or below the operator's active access level may be used.
"see also" reference	A reference from an established form of a heading to one or more related headings. Also known as a "see also" cross reference.
see reference	A reference to the established form of a name from a form which should not be used as a heading. Also known as a "'see' cross reference", "rejected form heading", or "variant form heading".
serial	A publication issued in successive parts bearing numerical or chronological designations and intended to be continued indefinitely. This includes periodicals, newspapers, annuals, etc. In ADVANCE, a serial is a *bibliographic item* (catalogued in the Cataloguing module) which may also have a *publication pattern* and *copy set* defined in the Serials module. A serial may also have *pieces* (barcoded items) assigned to it. Also see the definitions of *issue*, *copy*, and *holdings*.
Serials module	The ADVANCE module that automates serials control — primarily checkin and issue prediction.
shelf list	A catalogue of the items in a library; items are described in the same order that they are arranged on the shelves.
shelf location	Also "local call number". The *call number* assigned to a specific copy of an item.

sign off	Also "log off" and "logging off". To enter the necessary information to end a session on a terminal. The console command is "OFF". Compare to *sign on*.
sign on	Also "log on", "log in", and "logging on". To enter the necessary information (such as an identification number or password) to begin a session on a terminal. The console command is entry of a valid account name.
site	Customer library, usually where the computer is located.
sort	To arrange entities according to some pre-defined criteria, usually alphabetic.
spine label	Label for the spine of a book, typically with the call number.
string	Any succession of characters. These can be numbers, letters, blanks, or other characters. The PICK system treats most data simply as a sequence of symbols or "string".
subfield	In MARC format, the name for a defined part of the field in a MARC *variable-length field*, such as subfield b.
subfield code	The one-character code which identifies a MARC subfield: for example, the "a" in "‡a".
subject headings	Authorized terms that describe the contents of a book. Several may apply to a single work. One North American standard is LC Subject Headings.
surcharge	The charge automatically levied against a patron to cover certain costs, such as the cost of postage for notices, or ordering and cataloguing a replacement book.
syndetic structure	The logical organization of the catalogue, using *"see"* and *"see also" references* to interrelate the concepts represented in the catalogue.
SYSPROG	System Programmer. The highest-level account within PICK.
system backup	To copy (back up) all the files making up the system.
system manager	The library staff member responsible for the systems staff and the computer.

T

tag	The labelling mechanism used by MARC to associate data elements with their functions. Tags are composed of three digits: for example, "210" is the tag for the Abbreviated Title Field. Each different tag represents a different piece of bibliographic information: e.g., personal author, uniform title. "Tag" is sometimes used to mean MARC field.
tag number	A term sometimes used to mean *tag*.
tape	A magnetic tape reel or cassette, or the tape on the reel or cassette.
tape backup	The process of making a copy of data files and/or the system software. The library uses the backed-up tapes as a security precaution, in case the need for a 'restore' arises.
tape drive	The equipment that holds, reads from, and writes to magnetic tapes.
TCL	"Terminal Control Language" processor. TCL is the primary interface between end-users and the computer. The state in which the computer *prompt* is displayed and is waiting for user input is commonly called being "at TCL".
telecommunications	The organization and facilities that provide communications service between users in geographically separated locations. The term encompasses telephone, telegraph, radio, and satellite-based systems; unless otherwise indicated, telephone is usually assumed.
terminal	A device used by a person to communicate with the computer.
Terminal Number	Each terminal in a library system is assigned a unique number.
title	The name of a work, including any alternate title, subtitle, or other associated descriptive matter preceding the author, edition, or imprint statement on the title page.
tracing	Any record of entries or references that have been made in connection with the cataloguing of a particular work or publication, or with establishing a particular heading. Also known as subject headings or added entries.
track	A unit of data storage space on disk.

transfer	To read data in one location and write it in another location.
transaction	Any checkin, checkout, renewal, or hold.

U

UK/MARC	The United Kingdom version of the MARC format.
UNIX	A computer *operating system* developed by Bell Laboratories.
upload	The data flow from the microcomputer **up** to the host computer system.
UPS	"Uninterruptable Power Supply" — essentially a series of batteries that conditions the power to the computer, and, with the absence of electricity, provides power to the computer for a period of time (e.g. 30 minutes.)
user	Same as *patron*.
US/MARC	The version of the MARC format used in the USA.

V

variable-length field	Also "variable field". A MARC field in a bibliographic record whose length is not pre-defined: for example, the Title Statement Field (Tag 245). A variable field is composed of two one-digit *indicators* and one or more *subfields*.
vendor	A dealer, wholesaler, or other organization supplying books or other materials to the library.
volume	Bibliographic element of a series. For example, **The Art of Computer Programming** has three volumes. The important point is that volumes normally share SOME bibliographic elements with each other.
voucher	A request for the complete or partial payment of one or more invoices, usually sent to the library's financial services department.

W

wand	Device for reading barcodes. Known as *lightpen*.
wanding	Known as *scanning*.

WLN   "Western (formerly "Washington") Library Network" — a bibliographic utility.

word   A unit of data storage: 8, 16, or 32 bits depending on the computer.

work file   A file where data is temporarily stored before being placed in the database. Used in the Cataloguing module.

E

Community Information Module

The optional add-on Community Information Module (CIM) is installed as a separate database by Geac installers.

CIM database records can be catalogued in MARC or non-MARC mode as specified in Available OPAC Databases (AODB) on the Utility Menu. In this way, the library can control the cataloguing of records in the Community Information database without affecting the cataloguing of records in the main database.

This appendix discusses how CIM affects the Cataloguing and Online Catalogue modules.

Cataloguing

Defining MARC or non-MARC Cataloguing

Select MARC or non-MARC cataloguing from the Available OPAC Databases (AOBD) screen on the Utility Menu.

Masking Sensitive Information

The library can maintain the confidentiality of sensitive information by assigning a privilege level to **subfields** and **tags**. See *Defining MARC Fields* in the *Set Up Tables* chapter.

Records that contain privileged information can be identified by defining a position in the leader. See *Setup for Privileged Information Flag* in this appendix, and *Available OPAC Database* in the *Online Catalogue Guide*. The leader definition can be updated in CTSE for the specific format to include the definition of the privileged flag.

Defining CIM Tags & Subfields

See *Defining MARC Fields* in the *Setup Tables* chapter.

To determine the CIM menu equivalent to regular cataloguing functions see *Cataloguing in the CIM Database* in this appendix.

Editing Non-MARC Records

See *Editing a Retrieved Record in Non-MARC Mode* in the *Bibliographic Cataloguing* chapter in the *Cataloguing User's Guide*.

Edit Keys

Special edit key functions are available for non-MARC editing. See *Defining MARC Fields* in the *Setup Tables* chapter in this guide or the *Edit Functions* appendix in either of the cataloguing guides.

Setup for Privileged Information Flag

A privilege level can be assigned to tags/subfields that determines whether or not sensitive or privileged information entered in the specified tag/subfield will be displayed in the online catalogue or to cataloguing staff.

A specific leader character position can be designated as the privileged record indicator.

The library can identify records that contain privileged information by defining a position in the leader. The privileged information flag in a record's Leader determines whether the system uses or ignores the tag and subfield privilege level definitions.

If the *Privileged Record* field on the MARC FIXED FIELDS screen is set to 0 or blank, the system concludes that the record does not contain sensitive information and ignores the privilege level values in the bibliographic record. If the *Privileged Record* field is set to 1, the system concludes that the record does contain sensitive information and verifies that the user has the appropriate privilege level before the information is displayed.

Sensitive or privileged information can be entered at the subfield or tag level in bibliographic records and a privilege level assigned which will determine whether or not the information will be displayed in the online catalogue or to cataloguing staff.

1. Select Available OPAC Databases (AOBD) from the Utility Menu.

2. Select the database code record for the CIM database.

   Enter the character position in the MARC record Leader that can be used to denote that the record contains privileged or sensitive information. The default system setup uses character position 8 for this purpose. If the library chooses a value other than 8, the CAT.LEADER.CONVERSION item in the CF file must also be changed. Geac recommends that the library chooses character position 8 for the Privileged Record flag.

```
                    OPAC DATABASE CODES


     : CIM
    -------------------------------------------------------------------
1. Description                                  : Community Information
2. Internal Database type (1=Main, 2=Citations): 3
                     3=Community Information)
3. Code to Access Database                      : CIM
4. Catalogue in non-MARC (1) or MARC (0)    : 1
5. Position of privileged record flag in Leader: 8
    Attribute # for Command table              : 9




Options:
 ? help   # line   Line by line   Print   Exit
```

3. In Cataloguing, select CIM Tag & Subfield Descriptions (CTSD).
   Update the definitions for tags or tag subfields that may contain priv-
   ileged or sensitive information. For example, the library may not
   want to display personal address information (tag 270) in the online
   catalogue. In the following example, information in the 270 tag will
   be displayed only to users with an access level equal to or higher
   than 89.

```
                  TAG AND SUBFIELD VALIDATION


    Tag : 245

1) Description      : Title of event,program
2) Short Label      : TIL




    Valid Subfields  : 6,a,b,c,h,n,p

3) Subfield         :
   Description      :
   Short Label      :
   Privilege Level  :
   Subfield Reordering and Combinations:

4) Privilege Level for Tag: 0

Options:
 ? help   # line   Del subfield   Delete   File   Exit
```

4. Select CIM Tag & Subfield Edit Checks (CTSE) to update the
   Leader definition for the CI format so that the cataloguer will know
   where the Privileged Record flag is.

```
                         FIXED FIELDS


       Enter Format Type : CI.LEADER                    Length : 19

  1) Record Status
  2) Type of Record
  3) Kind of Data
  4) Indicator Count

Options:
  ? help   # line   Field length   Add #   Delete #   Backward   Forward
  Delete   File   Exit   Copy
```

If there is no existing *Privileged Record* field, choose the *Add #* option to
add a definition of the Privileged record flag to the leader definition.Use
the *File* option to save your changes.

```
                     FIXED FIELDS FORMAT & EDIT CHECKS

 1) Display label        : Privileged Record
 2) (L)eader / (T)ag     : L
 3) Beginning column     : 8
 4) Length of field      : 1
 5) Default character(s) : 0

 6) (U)pper / (L)ower case :
 7) Allowed entry length   : 1
 8) Required entry length  :

 9) Code prefix            :
10) Numeric (Y/N)          : N
11) Yes/No answer (Y/N)    : N
12) Valid entries          :  ,0,1


Options:
  ? help   # line   Line by line   File   Exit
```

5. Select CIM Cataloguing Workforms (`CCW`) to update the Leader definition for the cataloguing workforms that the library has set up for cataloguing Community Information.

```
                DEFINE CATALOGUING WORKFORM

      Format        :    CI
      Workform Name :    EVENT

     Tags Entered   :    8,40,245,275,275,301,440,511,520,531,650,1

 1) Marc Tag or (L)eader   : 245
    Occurrence number      :
    Modify Fixed Field (Y/N) :
    Default Indicators     :

    Subfields Entered      :

 2) Subfield               :
    Occurrence number      :
    Modify Fixed Field (Y/N) :
    Default Data           :
Valid Subfields  :
Valid Indicators :
Options:
 # line   File   Delete   Fixed field update   Delete tag.occ
 Delete tag.occ.subfield.occ   Copy   ? help   Exit
```

```
                          FIXED FIELDS


        Enter Format Type : CI.LEADER..AGENCY            Length : 19

 1) Record Status
 2) Type of Record
 3) Kind of Data
 4) Privileged Record
 5) Indicator Count




Options:
 ? help   # line   Field length   Add #   Delete #   Backward   Forward
 Delete   File   Exit   Copy
```

Choose the *Add #* option to add a definition for the Privileged record flag to the leader definition.

```
                     FIXED FIELDS FORMAT & EDIT CHECKS

 1) Display label        : Privileged Record
 2) (L)eader / (T)ag     : L
 3) Beginning column     : 8
 4) Length of field      : 1
 5) Default character(s) : 0

 6) (U)pper / (L)ower case :
 7) Allowed entry length : 1
 8) Required entry length :

 9) Code prefix          :
10) Numeric (Y/N)        : N
11) Yes/No answer (Y/N)  : N
12) Valid entries        :  ,0,1

Options:
 ? help   # line   Line by line   File   Exit
```

Marking Records as Privileged

1. In Cataloguing, choose CIM MARC Cataloguing (CCMC) to create/edit a community information record. Following are samples of the cataloguing display when the CIM database is defined to

- Catalogue in non-MARC

- Catalogue in MARC

a) Catalogue in non-MARC

```
                    BIBLIOGRAPHIC MARC CATALOGUING

Local Control # : 10004348    Transaction type : Original Entry
Last updated    : 25 MAY 1995  Leader           : nqn   2
Cataloguer      : Janet Ferguson (AU)

  1. General Fixed Field :   950404uuuuuueng
  2. Classification numb+:   12111
  3. Personal name       :   Clemente, Celia
  4. Address             :   570 DuBois Rd.
     City                :   Ithaca
     State or province   :   NY
     Postal code         :   14850
     Telephone number    :   (607) 387-5723
  5. Description note     :   TRANSLATION: Will translate legal and other
                             documents
  6. Biographical or his+:   EDUCATION:BA, Sociology--New York University.
                             MS, Social Work--Syracuse University, 1979.


Options:
  ? help   # line   Leader   Copy cataloguing   Overlay workform
  Item update   Link   Unlink   Reformat   Restore   Replace   Merge   Print
  Backward   Forward   File   Exit   Toggle mode
```

b) Catalogue in MARC

```
                    BIBLIOGRAPHIC MARC CATALOGUING

Local Control # : 10004348     Transaction type : Original Entry
Last updated    : 25 MAY 1995  Leader           : nqn   2
Cataloguer      : Janet Ferguson (AU)

 008     950404uuuuuueng
 084 BB a 12111
 100 1B a Clemente, Celia
 270 BB a 570 DuBois Rd.
       b Ithaca
       c NY
       e 14850
       k (607) 387-5723
 520 BB a TRANSLATION: Will translate legal and other documents
 545 BB a EDUCATION:BA, Sociology--New York University. MS, Social
         Work--Syracuse University, 1979.
 546 BB a Fluent in English and Spanish


Options:
  ? help   # tag   Leader   Copy cataloguing   Overlay workform
  Item update   Link   Unlink   Reformat   Restore   Replace   Merge
  Labelled display   Print   Backward   Forward   File   Exit   Toggle mode
```

2. Choose the Leader option to enter a 1 in the *Privileged Record* field (the record contains privileged or sensitive information).

```
                    MARC FIXED FIELDS

 Format                  : CI Community Information
 Local Control Number    : 10004348
 Transaction type        : Original Entry
 Date record created     : 04 APR 1995
 Date of last record update : 25 MAY 1995  09:04:00

 1. Record Status     : n
 2. Type of Record    : q
 3. Kind of Data      : n
 4. Privileged Record : 1
 5. Indicator Count   : 2


Options:
  ? help   # line   Line by line   File   Exit
```

3. File the record. Only users with an access level equal to or higher than 89 will be able to see the address information (tag 270) in this record. A cataloguer with access level lower than 89 would see the following:

```
                    BIBLIOGRAPHIC MARC CATALOGUING

Local Control # : 10004348    Transaction type : Original Entry
Last updated    : 25 MAY 1995  Leader          : nqn   21
Cataloguer      : Janet Ferguson (AU)

  1. General Fixed Field :   950404uuuuuueng
  2. Classification numb+:   12111
  3. Personal name      :   Clemente, Celia
  4. Address            :   <Privileged Information>
     City               :   <Privileged Information>
     State or province   :   <Privileged Information>
     Postal code        :   <Privileged Information>
     Telephone number    :   <Privileged Information>
  5. Description note     :   TRANSLATION: Will translate legal and other
                            documents
  6. Biographical or his+:   EDUCATION:BA, Sociology--New York University.
                            MS, Social Work--Syracuse University, 1979.


Options:
  ? help   # line   Leader   Copy cataloguing   Overlay workform
  Item update   Link   Unlink   Reformat   Restore   Replace   Merge   Print
  Backward   Forward   File   Exit   Toggle mode
```

Cataloguing in the CIM Database

Cataloguing in the CIM database is similar to cataloguing in the Main database except that the identifiers are different. The CIM database has separate tag definitions, and workforms from the Main database. Use the following table to compare CIM identifiers with their main database equivalents:

Cataloguing and CIM Equivalents

Cataloguing		CIM	
BCM	Bibliographic Cataloguing Menu	CCM	CIM Cataloguing Menu
BSM	Setup Menu	CCSM	CIM Cataloguing Setup Menu
BTSD	Tag & Subfield Edit Descriptions	CTSD	CIM Tag & Subfield Edit Descriptions
BTSE	Tag & Subfield Edit Checks	CTSE	CIM Tag & Subfield Edit Checks
BCW	Cataloguing Workforms	CCW	CIM Cataloguing Workforms
BWBD	Workfile Browse Delimiter	CWBD	CIM Workfile Browse Delimiter
BDBD	Deleted Records Workfile Browse Delimiter	CDBD	CIM Deleted Records Workfile Browse Delimiter
BEBD	Indexing Errors Workfile Browse Delimiter	CEBD	CIM Indexing Errors Workfile Browse Delimiter
BHBD	History Records Workfile Browse Delimiter	CHBD	CIM History Records Workfile Browse Delimiter
BCWS	Cataloguer's Work Screen	CCWS	CIM Cataloguer's Work Screen
BMC	MARC Cataloguing	CCMC	CIM MARC Cataloguing
BWC	Work File Cataloguing	CWC	CIM Work File Cataloguing
BAWM	Additional Work Files Menu	CAWM	CIM Additional Work Files Menu
BWDR	Deleted Records	CWDR	CIM Deleted Records
BWIE	Indexing Errors	CWIE	CIM Indexing Errors
BWHR	History Records	CWHR	CIM History Records
ACM	Authority Cataloguing Menu	CACM	CIM Authority Cataloguing Menu

Cataloguing and CIM Equivalents (Continued)

Cataloguing		CIM	
ASM	Set-Up Menu	CASM	CIM Set-Up Menu
ATSD	Tag & Subfield Descriptions	CATSD	CIM Tag & Subfield Descriptions
ATSE	Tag & Subfield Edit Checks	CATSE	CIM Tag & Subfield Edit Checks
ACW	Cataloguing Workforms	CACW	CIM Cataloguing Workforms
AWBD	Workfile Browse Delimiter	CAWBD	CIM Workfile Browse Delimiter
ADBD	Deleted Records Workfile Browse Delimiter	CADBD	CIM Deleted Records Workfile Browse Delimiter
AEBD	Indexing Errors Workfile Browse Delimiter	CAEBD	CIM Indexing Errors Workfile Browse Delimiter
AHBD	History Records Workfile Browse Delimiter	CAHBD	CIM History Records Workfile Browse Delimiter
ACWS	Cataloguer's Work Screen	CACWS	CIM Cataloguer's Work Screen
AMC	MARC Cataloguing	CACMC	CIM MARC Cataloguing
AWC	Workfile Cataloguing	CAWC	CIM Workfile Cataloguing
AAWM	Additional Workfiles Menu	CAAWM	CIM Additional Workfiles Menu
AWDR	Deleted Records	CAWDR	CIM Deleted Records
AWIE	Indexing Errors	CAWIE	CIM Indexing Errors
AWHR	History Records	CAWHR	CIM History Records
GBLCNG	Global Change Utility	CGBLCNG	CIM Global Change Utility

Online Catalogue

After CIM is Installed

Check that the settings for the CIM database in *Available OPAC Databases* (AODB) are correct for the library. See the *Online Search Setup* chapter in the *Online Catalogue Guide*.

OPAC Setup for Display of Records from the CIM Database

OPAC setup for the CIM database is similar to that for the Main or Citation databases. There are no setup requirements specific to CIM setup.

Use the *Privileged Information* functionality to mask sensitive information from OPAC users. See *Cataloguing* in this appendix.

F

Authority Loader

The authority loader reads incoming records from a load file and searches for the following conditions between each incoming record and the existing records in the authority database:

- no match

- matches a single 1XX

- matches a single 4XX

- matches multiple 4XXs

- near matches

You can pre-define what happens for each match condition by specifying in the loader profile (UAIX) what filing action will be taken.

If an incoming record's 1XX or 5XX matches more than one 1XX, or matches a 1XX and one or more 4XXs, this error is written to the errors workfile (AWIE).

This appendix covers:

- Profile Setup

- Using the Authority Loader

- Error Checking

Three example profiles and sample results are provided.

Profile Setup

The authority loader profile allows you to specify duplicate checking,
the local programs that will be run, and the types of authority matches to
be made.

Use the Authority Importing Menu (UAIM) in the Utilities module to
access the profile setup tables.

```
DD MMM YYYY           Geac ADVANCE Library System (#.##)         PPPPPP IIIIII
   HH:MM                      Your Library Name

                           AUTHORITY IMPORTING MENU


                    1. UAII    Import Standard MARC

                    2. UAIX    Index MARC Records

                    3. UAIS    Stop MARC Indexing

                    4. RF172   Index Report Log




          Enter the number of your selection and press <ENTER>
                  or  ?  followed by <ENTER> for Help.
              Press <ENTER> to return to previous level :
```

The profile defines:

- the institution code for the records to be indexed

- the field where the contents of the 001 field are to be transferred

- fields and subfields to be deleted

- transaction code to be added to the records

- duplicate checking criteria

- types of authority searches to be done

Select Index MARC Records (UAIX) from the Authority Importing
Menu to display the Authority Loader Screen Definition screen.

```
              AUTHORITY LOADER SCREEN DEFINITION              MASTER

     Number of records : 34
     Code      Description of Code
     --------  -------------------------------------------
  1. AB1       1xx (1) 4xx(1) 5xx(1) definitions
  2. AB111     1xx(M/R;C/T;W)   4xx(W)      5xx(W)
  3. AB112     1xx(M/R;C/T;W)   4xx(W)      5xx(FI;W)
  4. AB125     1xx(M/R;C/T;W)   4xx(FI)     5xx(FD;FD)
  5. AB2       1xx (1) 4xx(1) 5xx(2) definitions

 Options:
  # line   Add item   Forward   Backward   ? help   Exit
```

Select *# line* to display a profile or *Add item* to create a new profile definition.

```
              Convert / Index Loaded Authority MARC Records

     Authority profile ID  :  AB1

  1. Index Type Description:  1xx (1) 4xx(1) 5xx(1) definitions
  2. Institution of Tape   :  AU
  3. Tag 001 moves to tag  :  35
  4. Tag/Sub. Del. Code    :
  5. Add Transaction Code  :
  6. Cancelled Trans Code  :

  7. Duplicate Check CONTROL Number :        8. Required   (1 = Yes) :
  9. Duplicate Check LCCN Number    :       10. Required   (1 = Yes) :
 11. Duplicate Check ISBN Number    :       12. Required   (1 = Yes) :
 13. Duplicate Check ISSN Number    :       14. Required   (1 = Yes) :

 15. Local Conversion Subroutine   :
 16. Local Duplicate Subroutine    :
 17. Local Error Check Subroutine  :
 18. Merge Method                  :

 Options:
  ? help   Line by line   # line   Match conditions   Test   Start   Delete
  File   Print   Copy   Exit
```

1. Index Type   Descriptive field only.
   Description

2. Institution of Tape	Code for the institution where the records will be indexed. This becomes the institution code of the authority records. Specify a valid code from the *Holdings Institution Codes* table (CHIC) in Cataloguing.
3. Tag 001 moves to tag	Field where the contents of the incoming 001 should be put.
4. Tag/Sub. Del. Code	Indicates the fields and subfields that should be deleted from the records before loading. Specify a valid code from the *Tag/Subfield Deletion Codes* table (CSMDC) in Cataloguing.
5. Add Transaction Code	Indicates how the record was entered into the system (for example, OCLC). Specify a valid code from the *MARC Transaction Code* table (MTC).
6. Cancelled Trans Code	Used only if the incoming records already have a transaction code that should be deleted. For example, records imported from another ADVANCE system.
Duplicate Checking	The system checks for duplicate records according to the criterion entered. You can choose no checking by leaving all fields blank or you can supply some or all of the following information. There are two criteria for each number check: the *Duplicate Check ...* field and the *Required* field.

Use fields 7 to 14 to set up duplicate checks on the key fields of the incoming record.

Fields 7, 9, 11, and 13 can have a value in the range 1 through 4 to indicate the order in which you want to check these fields, where 1 is the highest priority and 4 the lowest. For example, if you want to do an ISSN check before the LCCN check and ignore both the CONTROL number and ISBN checks, you would leave fields 7 and 11 blank, put a 1 in field 13 and a 2 in field 9. Leaving any of the fields 7, 9, 11, or 13 blank cause that duplicate check to be skipped.

Fields 8, 10, 12, and 14 can have the value 0 or 1 to indicate whether the loader record must contain one of these numeric fields.

7. Duplicate Check CONTROL Number		Enter a priority rating from 1 to 4, or <Enter> to skip duplicate checking on this field. (The supplier control number, such as an OCLC number, is commonly defined in the MARC field 035 $a $z.)

8. Required

1	Required
0 or blank	Not required.

9. Duplicate Check LCCN Number		Enter a priority rating from 1 to 4, or <Enter> to skip duplicate checking on this field.

10. Required

1	Required
0 or blank	Not required.

11. Duplicate Check ISBN Number		Enter a priority rating from 1 to 4, or <Enter> to skip duplicate checking on this field.

12. Required

1	Required
0 or blank	Not required.

13. Duplicate Check ISSN Number		Enter a priority rating from 1 to 4, or <Enter> to skip duplicate checking on this field.

14. Required

1	Required
0 or blank	Not required.

15. Local Conversion Subroutine		Enter the name of the local conversion program to be called during indexing. If your loader file contains trailing punctuation that you want to remove, use the program CAT.AUTH.STRIP.PUNC.

16. Local Duplicate Subroutine		Enter the name of the local duplicate checking program.

17. Local Error Check Subroutine	Enter the name of the local error checking program.

18. Merge Method	Enter the number that indicates how you want the merge option to work. If no choice is made, the system defaults to *3. Any unique field*.

When the merge option is selected, determines which fields from the database record will be added to the incoming authority record. During merging, only repeatable fields are merged. For matching purposes the $w, $i, $5 and $6 subfields are ignored. When fields are added to or replaced in the incoming record, a 040 subfield d is added with the NUC (National Union Catalog) symbol for the library.

- **1. Any unique field with $5**

    Adds to the incoming record all the database fields with $5 subfields equal to the local library's NUC Symbol if they do not already occur in the incoming record.

- **2. Any field with $5**

    Replaces or inserts the fields from the incoming record with the fields from the database record which contain a $5 subfield equal to that of the library.

- **3. Any unique field**

    Adds all the database fields that do not already occur in the incoming record to the incoming record.

- **4. Any unique field; add $5**

    Adds the $5 subfield to the database record, and adds all the database fields that do not already occur in the incoming record to the incoming record.

Selecting a Merge Method	The following guidelines are offered as suggestions for selecting a merge method:

- Libraries that want to maintain their own local *See* and *See Also* references should use method 4 until all locally maintained authorities have been identified and then switch to method 2. You should also modify A.INDEX and add subfield 5 to the exclusion list (field 2) for any tags to which subfield 5 will be added.

- Libraries that have no intention of using subfield 5 should use method 3.

Cataloguing Management Guide   (September 2000)

• Libraries that intend to add their own unique references with a subfield 5 should use method 1.

The following examples are intended to illustrate how the system works. The data used does not represent information derived from a cataloguing source.

Method 1   **Any unique field with $5.**

Before loading into database	
Existing database records	**Incoming records**
| ```
040 BB a AUlibrary
       d AUlibrary
150 BB a Optical storage devices
450 BB a CD-ROM
550 BB w g
       a Computer storage devices
550 BB a Laser recording
550 BB a Computers
       x Optical equipment
550 BB a Mass storage devices
       5 AUlibrary
``` | ```
040 BB a DLC
       d DLC
150 BB a Optical storage devices
550 BB w g
       a Computer storage devices
550 BB a Laser recording
550 BB a Computers
       x Optical equipment
``` |

Database result **after** the Authority Loader has loaded the records. The unique heading "Mass storage devices" heading is added to the incoming record. The heading 450 a CD-ROM is not added.

Database records

```
040 BB a DLC
       d DLC
       d AUlibrary
150 BB a Optical storage devices
550 BB w g
       a Computer storage devices
550 BB a Laser recording
550 BB a Computers
       x Optical equipment
550 BB a Mass storage devices
       5 AUlibrary
```

Method 2   **Any field with $5.**

Before loading into database	
Existing database records	**Incoming records**

<pre>040 BB a AUlibrary
       d AUlibrary
150 BB a Optical storage devices
550 BB w g
       a Computer storage devices
550 BB a Laser recording
550 BB a Computers
       x Optical equipment
550 BB a Mass storage devices
       w g
       5 AUlibrary</pre>
	<pre>040 BB a DLC
	       d DLC
	150 BB a Optical storage devices
	550 BB w g
	       a Computer storage devices
	550 BB a Laser recording
	550 BB a Computers
	       x Optical equipment
	550 BB a Mass storage devices</pre>

Database result **after** the Authority Loader has loaded the records. The "Mass storage devices" heading overrides incoming heading. The local modification with the $w is maintained. The 040 tag is updated.

Database records

```
040 BB a DLC
       d DLC
       d AUlibrary
150 BB a Optical storage devices
550 BB w g
       a Computer storage devices
550 BB a Laser recording
550 BB a Computers
       x Optical equipment
550 BB a Mass storage devices
       w g
       5 AUlibrary
```

Method 3 **Any unique field.**

Before loading into database	
Existing database records	**Incoming records**
| ```
040 BB a AUlibrary
       d AUlibrary
150 BB a Optical storage devices
550 BB w g
       a Computer storage devices
550 BB a Laser recording
550 BB a Computers
       x Optical equipment
550 BB a Mass storage devices
``` | ```
040 BB a DLC
       d DLC
150 BB a Optical storage devices
550 BB w g
       a Computer storage devices
550 BB a Laser recording
550 BB a Computers
       x Optical equipment
``` |

Database result **after** the Authority Loader has loaded the records. The "Mass storage devices" heading is added from the database to the incoming record. No $5 subfields are added. A $d is added to 040.

Database records

```
040 BB a DLC
       d DLC
       d AUlibrary
150 BB a Optical storage devices
550 BB w g
       a Computer storage devices
550 BB a Laser recording
550 BB a Computers
       x Optical equipment
550 BB a Mass storage devices
```

Method 4   **Any unique field; add $5.**

Before loading into database	
Existing database records	**Incoming records**
| ```
040 BB a AUlibrary
       d AUlibrary
150 BB a Optical storage devices
450 BB a CD-ROM
550 BB w g
       a Computer storage devices
550 BB a Laser recording
550 BB a Computers
       x Optical equipment
550 BB a Mass storage devices
``` | ```
040 BB a DLC
        d DLC
150 BB a Optical storage devices
550 BB w g
       a Computer storage devices
550 BB a Laser recording
550 BB a Computers
       x Optical equipment
``` |

Database result **after** the Authority Loader has loaded the records. The "Mass storage devices" heading is merged into the incoming record. A $5 subfield with the library's NUC symbol is added to the tag to identify this as a locally maintained heading. A $d subfield with the library's NUC symbol is also added to the 040 tag. Unlike Method 1, the 450 a CD-ROM heading is also added to the incoming record.

Database records

```
040 BB a DLC
       d DLC
       d AUlibrary
150 BB a Optical storage devices
450 BB a CD-ROM
       5 AUlibrary
550 BB w g
       a Computer storage devices
550 BB a Laser recording
550 BB a Computers
       x Optical equipment
550 BB a Mass storage devices
       5 AUlibrary
```

Match Conditions

Select the *Match conditions* option to specify the Options and Filing Actions you want to occur when incoming authority records are loaded into your database.

The loader builds a matrix of match conditions and you can specify the database action that should occur when any of these conditions is met. This matrix consists of three search types and five possible match conditions.

The following table displays the filing actions and options that are allowed for each match condition.

Possible Options and Filing Actions for Each Match Condition					
Search Type	**Match on Existing Authority Database**				
	No Match	**Matches a Single 1XX**	**Matches a Single 4XX**	**Matches Multiple 4XXs**	**Near Match(es)**
Incoming 1XX or Direct Key	*Report*	*Report* *Merge*	*Report* *Merge* *Trace*	*Report* *Merge* *Trace*	*Report*
	Discard Create Workfile	Discard Replace Workfile	Discard Replace Create Workfile	Discard Replace Create Workfile	
Incoming 4XX	The See tracing is created if the record is filed into the database.	*Report* *Merge* Discard Flip Incoming Flip Database Workfile	If the incoming tracing matches exactly a tracing in an existing authority record, no action is taken.	If the incoming tracings match exactly existing tracings in the authority record, no action is taken.	*Report*
Incoming 5XX	The authority is created if the record is filed into the database.	The tracing from the incoming record is added to the existing authority record.	*Report* Discard Flip Incoming Flip Database Workfile	*Report* Discard Flip Incoming Flip Database Workfile	*Report*

Report option (R)   Report whether or not a match occurred.

Merge option (M)   Merge the contents of the matched record(s) with the incoming record by copying all repeatable fields from the matched record(s) into the incoming record. If the matched record(s) contain fields that also appear in the incoming record, do not copy these fields.

	NOTE: The Merge option is not allowed when the Filing Action is *Discard*, *Flip Incoming* (when a 4XX matches a single 1XX), or *Create Database* (when a 1XX matches one or more 4XXs).
Trace option (T)	Add the appropriate See or See Also tracing by copying the 1XX from the matched record(s) into the incoming record. If the Filing Action is Create, add 5XXs; if the Filing Action is Replace, add 4XXs.
Discard action (D)	Discard the incoming record.
Create action (C)	Create a new database record. Commonly used with the *Trace* option.
Replace action (R)	Replace the database record(s). Commonly used with the *Trace* option.
Workfile action (W)	Create a workfile record in the area specified in the loader profile.
Flip Incoming action (FI)	Change the incoming record to match the database record(s).
	For 4XX searches, change the incoming 4XX to a 5XX.
	For 5XX searches, change the incoming 5XX to a 4XX.
Flip Database action (FD)	Change the database record(s) to agree with the incoming record.
	For 4XX searches, change all bibliographic and authority records that point to the database record to point to the incoming record. Remove the database authority record.
	For a 5XX search, change all 4XXs in the database record(s) to 5XXs.

Match Conditions Screen

```
                Convert / Index Loaded Authority MARC Records

  Profile   :  MC1 1xx(1) 4xx(1) 5xx(1) definitions
  ---Search Results---
  1xx tag / Direct Key      Filing Action          Options
   1. No match              C=Create               R=Report
   2. Matches one 1xx       R=Replace              R=Report, M=Merge
   3. Matches one 4xx       C=Create               R=Report, T=Trace
   4. Matches multiple 4xxs W=Workfile (COLLIER)   R=Report
   5. Near match(es)                               R=Report

  4xx tag
   6. Matches one 1xx       W=Workfile (COLLIER)   R=Report
   7. Near match(es)                               R=Report

  5xx tag
   8. Matches one 4xx       W=Workfile (COLLIER)   R=Report
   9. Matches multiple 4xxs W=Workfile (MASTER)    R=Report
  10. Near match(es)                               R=Report

  Options:
   Accept   # line   Line by line   Print   Test   Start   ? help   Exit
```

Profile

Authority profile ID and Index Type Description. Display field only.

Filing Actions and Options

Under *Filing Actions*, you may select one action. Under *Options*, in some instances you may select one or more options, but they must be separated by a comma.

Enter all selections as a single letter in upper case.

If the Filing Action is *Discard*, *Create* or *Flip Incoming*, the *Merge* option is **not** allowed.

If the Filing Action is *Discard* or *Workfile*, the *Trace* option is **not** allowed.

NOTE: The system restricts you to specific Filing Actions and Options. If you enter an invalid choice, a prompt appears at the bottom of the screen. Enter one of the allowed actions or <Enter> to exit.

1XX searches or Direct Key Searches

1. No match   Discard, Create, Workfile

Filing Actions   Enter D to discard the incoming record.

                          Enter C to create a new authority from the incoming record.

                          Enter W to create a workfile record.

                          The system prompts: `Enter a valid workfile ID.` <Enter> to accept the system provided default or enter an existing workfile ID.

Options   Enter R to report the match/non-match condition and the Filing Action on the Authority Import Load Report (RF172).

2. Matches one 1XX   Discard, Replace, Workfile

Filing Actions   Enter D to discard the incoming record.

                          Enter R to replace the existing authority with the incoming record.

                          Enter W to create a workfile record.

                          The system prompts: `Enter a valid workfile ID.` <Enter> to accept the system provided default or enter an existing workfile ID.

Options   Enter R to report the match/non-match condition and the Filing Action on the Authority Import Load Report (RF172).

                          Replace or Workfile actions. Enter M to merge the incoming record and the database record.

3. Matches one 4XX   Discard, Create, Workfile, Replace

Filing Actions   Enter D to discard the incoming record.

                          Enter C to create a new authority from the incoming record

                          Enter R to replace the authority that the 4XX is linked to with the incoming record.

                          Enter W to create a workfile record.

                          The system prompts: `Enter a valid workfile ID.` <Enter> to accept the system provided default or enter an existing workfile ID.

Options	Enter R to report the match/non-match condition and the Filing Action on the Authority Import Load Report (RF172).

Create action: T and/or R.

- Enter T to trace. ADVANCE adds a 5XX to the incoming record for any matched 1XX found in the database.

- Enter R to report.

Replace action: R, T, M.

- Enter R to report.

- Enter T to trace. ADVANCE adds a 4XX to the incoming record for any matched 1XX found in the database and links all bibliographic records to the incoming authority record.

- Enter M to merge the incoming record and the database record.

Workfile action: M and/or R.

- Enter M to merge the incoming record and the database record.

- Enter R to report.

4. Matches multiple 4XX	Discard, Create, Workfile, Replace
Filing Actions	Enter D to discard the incoming record.

Enter C to create a new authority from the incoming record.

Enter W to create a workfile record.

Enter R to replace the existing authority with the incoming record.

The system prompts: Enter a valid workfile ID. <Enter> to accept the system provided default or enter an existing workfile ID.

Options	Enter R to report the match/non-match condition and the Filing Action on the Authority Import Load Report (RF172).

Create action: T and/or R.

- Enter T to trace. ADVANCE adds a 5XX to the incoming record for any matched 1XX found in the database.

- Enter R to report.

Replace action: R, T, or M.

- Enter R to report.

- Enter T to trace. ADVANCE adds 4XX to the incoming record for any matched 1XX found in the database and links all bibliographic records to the incoming authority record.

- Enter M to merge the incoming record and the database record or R to report.

Workfile action: M and/or R.

- Enter M to merge the incoming record and the database record or R to report.

- Enter R to report.

5. Near match(es)

Filing Actions   None.

Options   Near matches are reported only.

4XX searches

6. Matches one 1XX   Discard, Workfile, Flip incoming, Flip database

Enter D to discard the incoming record.

Enter W to create a workfile record.

The system prompts: Enter a valid workfile ID. <Enter> to accept the system provided default or enter an existing workfile ID.

Enter FI to change the incoming 4XX to a 5XX to agree with the database.

Enter FD to change all bibliographic and authority records links from the database 1XX to the incoming authority record. The previously linked database authority record will be removed.

Options   Enter R to report the match/non-match condition and the Filing Action on the Authority Import Load Report (RF172).

Workfile action: M and/or R.

- Enter M to merge the incoming record and the database record.

- Enter R to report.

Flip database action: M and/or R. Enter M to merge the incoming record and the database record or R to report.

7. Near match(es)

Filing Actions   None.

Options   Near matches are reported only.

5XX searches

8. Matches one 4XX

Discard, Workfile, Flip incoming, Flip database

Enter D to discard the incoming record.

Enter W to create a workfile record.

The system prompts: Enter a valid workfile ID. <Enter> to accept the system provided default or enter an existing workfile ID.

Enter FI to change the incoming 5XX to a 4XX.

Enter FD to change the 4XX in the database to a 5XX.

Options   Enter R to report.

9. Matches multiple 4XXs

Discard, Workfile, Flip incoming, Flip database

Enter D to discard the incoming record.

Enter W to create a workfile record.

The system prompts: Enter a valid workfile ID. <Enter> to accept the system provided default or enter an existing workfile ID.

Enter FI to change all incoming 5XX to 4XX.

Enter FD to change all 4XX in the database to 5XX.

Options   Enter R to report the match/non-match condition and the Filing Action on the Authority Import Load Report (RF172).

10. Near match(es)

Filing Actions   None.

Options   Near matches are reported only.

Using the Authority Loader

When the Authority Loader reads a record from the load file (normally A.MARC.NEW), it performs the following functions.

1. Standard conversions are done first.

   a. Moves the control number from field 001 of the incoming record (if any) to the field specified in field 3 (*Tag 001 moves to tag*) of the first screen of Index MARC Records (UAIX). If the 003 tag is present and if the specified *move to* field is the 035 tag, then the NUC symbol for the 003 and the number for the 001 are moved to the 035 field in the format *(NUC) number*.

   b. Deletes tag 005 if it exists and stores the contents in a local field (Attribute 8 of the MARC record).

   c. Deletes whichever fields and subfields are specified in field 4 (*Tag/Sub. Del. Code*) of the first screen of the profile.

   d. Adds the transaction code specified in field 5 (*Add Transaction Code*) of the first screen of the Index MARC Records (UAIX).

2. If a conversion is specified in field 15 (*Local Conversion Subroutine*) on the first screen of the Index MARC Records (UAIX), the loader does that conversion next. The ADVANCE subroutine, CAT.AUTH.STRIP.PUNC, can be called at this point to strip trailing punctuation from the authorities being loaded.

3. For USMARC and UNIMARC, the only check the loader performs is to verify that there is a 1XX heading in the incoming record. If there is not, an error condition is set and a 1XX heading with the string `*** 1XX heading not found ***` is inserted into the record and the record is written to the errors workfile. No further checks are done on this record.

4. If an error check routine is specified in field 16 (*Local Duplicate Subroutine*) on the first screen of the Index MARC Records (UAIX), the loader calls it next.

5. Standard duplicate checks are done next.

   a. The 1XX heading of the loader record is checked for a match. The sort string generated by the 1XX in the loader is used to search the main index file (A.TREE). All authority keys that match this string are returned and then each A.MARC record is

compared to the loader record at the field, indicator, subfield, and data levels.

If it matches at all these levels, it is considered an exact match, otherwise it is considered a near match.

b. The 4XX headings of the loader record are checked for a match. (Matching the 4XX headings is done in the same way as for the 1XX.)

c. The 5XX headings of the loader record are checked for a match. (Matching the 5XX headings is done in the same way as for the 1XX.)

d. If no authority key matches the 1XX match, or if there are no 4XX links to a 1XX, then the duplicate checks for CN, LCCN, ISBN, and ISSN are made, if specified in the authority loader profile. If you request duplicate checking and specify it as a required field and the system does not find the control number, this condition is reported as an error and is written to the indexing errors workfile.

6. If a duplicate check routine is specified in field 17 (*Local Error Check Subroutine*) on the first screen of the Index MARC Records (UAIX), the loader calls it next.

7. When doing the duplicate checks, the loader checks for two error conditions:

a. The 1XX exactly matches more than one 1XX heading on the database.

b. The 1XX exactly matches one 1XX and matches a 4XX which may be linked to more than one established heading.

In either situation, the loader cannot determine which is the correct record to replace and the loader record is written to the indexing errors workfile.

8. All the match conditions in the table which have been found are reported, if so specified in the loader profile.

9. The loader determines the Filing Action in the following order of precedence. Once one of the conditions is met, the Filing Action is decided and no other checks are done.

a. Discard. If any of the match conditions has the Filing Action *Discard*, the loader record is discarded. For example, if the

incoming 4XX matched a 1XX on the database and this condition was set to write to the workfile, but the 1XX found no match and this condition was set to discard, the discard would take precedence and the loader record would be discarded.

b. Workfile. If any of the match conditions has the Filing Action *Workfile*, the loader record is written to the workfile.

c. Replace. If any of the match conditions has the Filing Action *Replace*, the matched database record is replaced by the loader record.

d. Create. If any of the match conditions is set to create, then a new database record is created.

e. If none of the Filing Actions is found, the loader record is discarded.

Note: The main Filing Action is normally determined by the 1XX match condition, but can be overridden by the 4XX or 5XX match condition.

10. If the Filing Action is *Create* or *Replace*, the loader checks for Flip Incoming or Flip Database actions that were generated by the 4XX or 5XX match condition and processes them.

11. If there were any other options specified with the main Filing Action, such as *Merge* or *Trace*, these are processed. For the *Trace* option, the appropriate type of tracing is added to the incoming record using the 1XXs of the matched records. If the Filing Action is *Create*, then See Also tracings (5XX) are added; if the filing Action is *Replace*, then See tracings (4XX) are added.

12. The *Replace* or *Create* action is processed and the record is written to the database.

Sample Profiles

Three examples profiles and sample record changes are provided in this section.

NOTE: Only the *Match conditions* screen is displayed for reference.

Example 1

This profile:

- preserves your database records,

- adds new records from the load file if the incoming records do not match anything in your database,

- updates existing records with additional data from the loader.

If there is a conflict between an existing record and an incoming record, a new established heading is created and a 5XX tracing is made from the existing heading.

```
              Convert / Index Loaded Authority MARC Records

Profile   : LOAD1 Preserve existing data
---Search Results---
1xx tag / Direct Key      Filing Action          Options
 1. No match              C=Create               R=Report
 2. Matches one 1xx       R=Replace              R=Report, M=Merge
 3. Matches one 4xx       C=Create               T=Trace, R=Report
 4. Matches multiple 4xxs C=Create               T=Trace, R=Report
 5. Near match(es)                               R=Report

4xx tag
 6. Matches one 1xx       FI=Flip incoming       R=Report
 7. Near match(es)                               R=Report

5xx tag
 8. Matches one 4xx       FI=Flip incoming       R=Report
 9. Matches multiple 4xxs FI=Flip incoming       R=Report
10. Near match(es)                               R=Report
```

Results

Before loading into database	
Existing database records	**Incoming records**
| ```
Database 1
150 Optical disks
450 Discs, Optical
``` | ```
Incoming 1
150 Storage devices
550 Discs, Optical
``` |
| ```
Database 2
151 Kampuchea
451 Cambodia
``` | ```
Incoming 2
151 Cambodia
``` |
| Database result **after** the Authority Loader has loaded the records. | |
| **Database records** | |
| ```
Database 1
150 Optical disks
450 Discs, Optical
``` | |
| ```
Incoming 1
150 Storage devices
450 Discs, Optical   (incoming 550 flipped)
``` | |
| ```
Incoming 2
151 Cambodia
551 Kampuchea     (trace added to incoming record)
``` | |
| ```
Database 2
151 Kampuchea     (conflicting 451 tracing removed)
``` | |

Example 2

This profile:

- accepts the contents of the incoming records

- changes your existing database records to agree with the incoming records, without creating new records.

```
              Convert / Index Loaded Authority MARC Records

Profile    : LOAD2 Accept all loader records
---Search Results---
1xx tag / Direct Key      Filing Action          Options
 1. No match              D=Discard              R=Report
 2. Matches one 1xx       R=Replace              M=Merge, R=Report
 3. Matches one 4xx       R=Replace              M=Merge, R=Report, T=Trace
 4. Matches multiple 4xxs R=Replace              M=Merge, R=Report, T=Trace
 5. Near match(es)

4xx tag
 6. Matches one 1xx       FD=Flip database       R=Report
 7. Near match(es)                               R=Report

5xx tag
 8. Matches one 4xx       FD=Flip database       R=Report
 9. Matches multiple 4xxs FD=Flip database       R=Report
10. Near match(es)                               R=Report
```

Results

Before loading into database	
Existing database records	**Incoming records**
| ```
Database 1
150 Optical disks
450 Discs, Optical
``` | ```
Incoming 1
150 Storage devices
550 Discs, Optical
``` |
| ```
Database 2
151 Kampuchea
451 Cambodia
``` | ```
Incoming 2
151 Cambodia
``` |
| Database result **after** the Authority Loader has loaded the records. | |
| **Database records** | |
| ```
Database result
Database 1
150 Optical disks
550 Discs, Optical (450 flipped to 550)
``` | |
| ```
Incoming 1
150 Storage devices
550 Discs, Optical
``` | |
| ```
Database 3 created by incoming 550
150 Discs, Optical
``` | |
| ```
Incoming 2 replaces Database 2
151 Cambodia
451 Kampuchea    (trace added to incoming record)
``` | |

Example 3

This profile:

- adds any new records from the incoming tape,

- updates existing records to conform to incoming records,

- if there is a conflict between incoming and existing records, writes the record to a workfile, so that it can be checked or edited at a later point.

```
              Convert / Index Loaded Authority MARC Records

Profile    : LOAD3 Conflicts to workfile
---Search Results---
1xx tag / Direct Key      Filing Action          Options
 1. No match              C=Create               R=Report
 2. Matches one 1xx       R=Replace              R=Report, M=Merge
 3. Matches one 4xx       W=Workfile (MARY)      R=Report
 4. Matches multiple 4xxs W=Workfile (JOHN)      R=Report
 5. Near match(es)                               R=Report

4xx tag
 6. Matches one 1xx       W=Workfile (JOHN)      R=Report
 7. Near match(es)                               R=Report

5xx tag
 8. Matches one 4xx       W=Workfile (FRED)      R=Report
 9. Matches multiple 4xxs W=Workfile (JOHN)      R=Report
10. Near match(es)                               R=Report
```

Results

Before loading into database	
Existing database records	**Incoming records**
| ```
Database 1
150 Optical disks
450 Discs, Optical
``` | ```
Incoming 1
150 Storage devices
550 Discs, Optical
``` |
| ```
Database 2
151 Kampuchea
451 Cambodia
``` | ```
Incoming 2
151 Cambodia
``` |
| Database result **after** the Authority Loader has loaded the records. | |
| **Database records** | |
| ```
Database result
Database 1
150 Optical disks
450 Discs, Optical
``` | |
| ```
Incoming 1 written to workfile FRED\A
150 Storage devices
550 Discs, Optical
``` | |
| ```
Database 2
151 Kampuchea
451 Cambodia
``` | |
| ```
Incoming 2 written to workfile MARY\A
(linked to Database 2)
151 Cambodia
``` | |

Error Checking

If the authority loader encounters more than one 1XX, or a 1XX and one or more 4XXs, this condition is reported in the errors workfile.

Error Workfile

Indexing errors are written to the authority cataloguing workfile. You can display the errors (if you have the correct authorization) by selecting Indexing Errors (AWIE) from the Authority Work Files Menu.

Indexing errors are identified by *ERR* in the *ID* column.

```
                    CATALOGUING WORKFILE BROWSE
     Browsing : a

      Code  LCN      ID        Heading
     --------------------------------------------------------------------------
      1.  A 10000830 *ERR*    *** 1xx Heading not found ***
      2.  A 10000971 *ERR*    Guelf, House of
      3.  A 10000970 *ERR*    Guelf, House of
      4.  A 10000961 *ERR*    Guelf, House of
      5.  A 10000960 *ERR*    Guelf, House of







      ** Last Screen **
     Options:
      # line   Forward   Backward   Search jump   Exit   New search   ? help
```

Error Report

Use the Authority Index Report Log (RF172) to determine whether matches were made between incoming and database records and to see the results of the any filing actions.

Select Index Report Log (RF172) from the Authority Importing Menu. (See the *Reports Guide* for information about producing reports.)

RF172

```
RF172                    Authority import load report            Page   1
05-08-96                       Your Library Name                   17:53:10
                               From: 07 MAY 1996


Stat
0=Ok  Date    Load                                          Filing
1=Err Time.... ID... Dup LCN. Matched Heading. Message........ Action.........



0    05/07/96   21                             1xx has no match Database record
                                                               created
      02:55PM
1    05/07/96   13 10005167 Arlen, Harold      1xx matches a   Error: 1xx
                            1905-1995          1xx             matches more
                            Bloomer girl                       than 1 1xx
                                                               heading
      01:06PM     10005578 Arlen, Harold      1xx matches a
                            1905-1995          1xx
                            Bloomer girl
0    05/08/96   45 10005219 Jones, Xaviera     1xx matches a   Database record
                                               1xx             replaced
      02:11PM     10005224 Jones, Doctor      4xx matches a
                            Xaviera            1xx
                  10005220 Wilson,            5xx matches a
                            Georgette          4xx on multiple
                                               records
                  10005224 Jones, Doctor      5xx matches a
                            Xaviera            4xx on multiple
                                               records
0    05/08/96   45 10005219 Jones, Xaviera     1xx matches a   Database record
                                               1xx             replaced
      03:55PM     10005581 Jones, Doctor      4xx matches a
                            Xaviera            1xx
                  10005220 Wilson,            5xx matches a
                            Georgette          4xx on multiple
                                               records
                  10005581 Jones, Doctor      5xx matches a
                            Xaviera            4xx on multiple
                                               records
0    05/08/96   45 10005219 Jones, Xaviera     1xx matches a   Database record
                                               1xx             replaced
      04:37PM     10005585 Jones, Doctor      4xx matches a
                            Xaviera            1xx
                  10005220 Wilson,            5xx matches a
                            Georgette          4xx on multiple
                                               records
                  10005585 Jones, Doctor      5xx matches a
                            Xaviera            4xx on multiple
                                               records
0    05/08/96   45 10005219 Jones, Xaviera     1xx matches a   Database record
                                               1xx             replaced
      05:46PM     10005588 Jones, Doctor      4xx matches a
                            Xaviera            1xx
                  10005220 Wilson,            5xx matches a
                            Georgette          4xx on multiple
                                               records
                  10005588 Jones, Doctor      5xx matches a
                            Xaviera            4xx on multiple
                                               records

6 records listed.
```

Stat 0=Ok 1=Err		Status of the match condition between incoming and database records.
	0	Indicates that the authority loader completed the requested match test.
	1	An error condition was recognized when the authority loader attempted to complete the match test.

Date Time   Time and date when the loader resolved the match condition.

Load ID   Identification number of the incoming record.

Dup LCN   Local control number of the matched record in the database.

Matched Heading   Heading of the matched record in the database.

Message   Authority match condition that resulted from the comparison of the incoming record and the database record.

Filing Action   Action the authority loader executed as a result of the selections made in the authority loader profile.

Online Reporting of Errors   Errors that appear in the *Message* column of report RF172 also appear on the CATALOGUING WARNING/ERROR LIST screen if you attempt to file the record into the database.

The record can be edited in the authority cataloguing workfile.

Cataloguing Management Guide   (September 2000)

G

User Permissions

Introduction

In the Utilities Function, library administration staff can define user-specific permissions for many of the Cataloguing functions and tasks (see the *Utilities Management Guide*). This appendix lists and briefly describes these permissions.

Levels of Permission

There are three levels of permission: `Y`, `N`, and `P`.

`Y`   The user has permission for the specified function or task, perhaps qualified by special restrictions. In addition, other permissions may be required — for example, you cannot move holdings between sublocations (permission 070) unless you change current holdings information (permission 069).

`N`   The user does not have permission for the specified function or task.

`P`   The user must enter a library-specified password to have permission. With the correct password, this is equivalent to `Y`; without the correct password, this is equivalent to `N`.

The `P` level is useful at libraries in which people share terminals and a single user `ID` is defined for an area of work (such as ordering). The high-security tasks (such as authorizing an order) can be password controlled. The people who know the password can enter the password when they need to perform the task, then afterward leave the terminal as is — they do not need to log off, log in as a higher-level user, perform the task, and afterward log back off and then on again as a lower-level general user.

Restrictions

Qualifiers or restrictions are not used with some types of permissions. Any permission designated as a type 2 on the General Permissions Setup table will not have a qualifier. Types of General Permissions are Geac assigned and cannot be changed by the library. (See the *Utilities Management Guide*.)

MARC Database
Permissions may be restricted to the authority or bibliographic database.

Sublocation Code
Restricts access to holdings maintenance by sublocation code. If an Institution Code with sublocations is specified, then any activity that can be performed at the institution can also be performed at any of the sublocations. If no sublocations are specified then the Institution Code is used to access holdings maintenance.

Additional Details and Keyword Table
Two tables, *Additional details* and *Keyword table,* on the UPDATE MODULE ACCESS RECORD screen provide additional ways to limit access to certain functions. The *Additional details* option restricts access to MARC record editing by specifying which MARC fields or subfields can be changed, added, or deleted. The *Keyword table* option allows you to specify by screen identifier which menus are accessible.

Permission List by Permission ID Number

Permission ID Numbers are assigned by the system. To display Permission ID Numbers grouped by module use MODULE PERMISSIONS (MPERM) on the SECURITY MENU.

068 - Change MARC records
069 - Change current information for holdings
070 - Move holdings between locations
075 - Add MARC records
076 - Delete MARC records
077 - Merge and replace MARC records
078 - Add holdings
079 - Delete holdings
080 - Move holding records between bibs
106 - Change owning information for holdings
107 - Change Call numbers
113 - Edit Publication Patterns

068 - Change MARC records

Y / P   Allows you to edit MARC record. MARC fields and subfields may be modified.

MARC fields and subfields may be added, deleted, or changed.

When a record is filed, changes are validated against the Tag Definition tables. The source of the record does not matter, for example, it may be a GeoCat record.

ADVANCE allows you to make changes to the record that you may not have permission to make. In this case, when you attempt to file the changes the system displays the Cataloguing Warning/Error List. In some instances you can file a record into the Workfile even if you do not have all the required permissions. However, you will not be allowed to file the record into the Main database.

N   The system displays the message: You can look at this item but changes are not permitted.

Prerequisite   None.

Restriction   By MARC database.

Access to specific MARC fields and subfields can be restricted from the *Additional details* option on the USER GROUP ACCESS CODE SETUP screen.

069 - Change current information for holdings

Y / P   Allows you to edit holdings information for current data. The holdings information not only includes the information in the piece record but also the location copy record, type of holdings record, parts record, serial copy set record and the publication pattern record. This permission is not required for creating temporary pieces records from Conversion-on-the-Fly.

If you have this permission only, you cannot add or delete pieces.

In Serials Control, this permission determines which copy set issues can be modified. For a specified sublocation, staff may claim, receive, or return issues. This permission also determines which copy set records can be changed.

N   The system displays the message: `You can look at this item but changes are not permitted.`

Prerequisite   None.

Restriction   By sublocation.

070 - Move holdings between sublocations

Y / P   Allows you to change the Current institution and sublocation codes. Provides access to the *Move #(s)* option on the PIECES SUMMARY and PIECES/PARTS SUMMARY screen.

You must have this permission to change the Current institution and sublocation codes in Mass Holdings Update (`CMHU`).

This permission does not allow you to change the owning location.

N   The system displays the message: `You are not permitted to move holdings from this location: CAM1`

Prerequisite   Permission 69. Staff must have permission to change current holdings information.

Restriction   By sublocation.

075 - Add MARC records

Y / P   Allows you to add MARC records. All tags are considered new and are validated with the Tag Definition Table for Adding Tags which is defined from the *Additional details* option on the UPDATE MODULE ACCESS RECORD screen. If you create tags that you do not have permission to add, the Cataloguing Warning/Error List appears when you file the record. A message appears for each field that you are not specifically allowed to add. You will not be able to file the record into the main database or the workfile until the errors are corrected.

N   The system displays the message: `Access not permitted.`

Prerequisite   None.

Restriction   By MARC database.

076 - Delete MARC records

Y / P   Allows you to delete MARC records.

If you have created a record and filed it into your workfile, you are allowed to delete the record you created even if you do not have permission to delete MARC records. All tags are validated with the Tag Definition Table for Deleting Tags which is defined from the *Additional details* option on the UPDATE MODULE ACCESS RECORD screen

N   When you attempt to delete the record from the main database, the system displays the Cataloguing Warning/Error List with the message: You are not permitted to delete MARC records.

Prerequisite   None.

Restriction   By MARC database.

Access to specific MARC fields and subfields can be restricted from the *Additional details* option on the UPDATE MODULE ACCESS RECORD screen.

077 - Merge and replace MARC records

Y / P   The *Merge* and *Replace* options display.

N   The *Merge* and *Replace* options are not available on the option line.

Prerequisite   None.

Restriction   By MARC database.

078 - Add holdings

Y / P   Allows you to use to the *Add item* option on the PIECES SUMMARY, TYPE OF HOLDING SUMMARY, PUBLICATION PATTERN SUMMARY, LOCATION COPY SUMMARY, and SERIAL COPY SET SUMMARY screens. This permission and the permission to checkin serials (permission 108) determine whether the *Insert at line #* option appears on the PARTS SUMMARY. Either one permits you to access this option.

If you checkin a serial item (permission 108) or change the status of a part to *Received* on the PARTS DETAIL screen, the system considers this action equivalent to adding holdings and you must have either permis-

sion 078 or 108. Moreover, when you select the *Location add* option on the PARTS DETAIL screen, the system displays a list of location copies that you can add. This list is qualified by the permission 078 or 108.

For a conversion-on-the-fly item, this permission allows staff to change the sublocation of the item.

This permission is not required for adding a conversion on the fly item.

N   The *Add item* option does not display on the PIECES SUMMARY screen

Prerequisite   None.

Restriction   By sublocation.

079 - Delete holdings

Y / P   Allows you to use the *Delete item(s)* option on the PIECES SUMMARY,TYPE OF HOLDING SUMMARY, PUBLICATION PATTERN SUMMARY, LOCATION COPY SUMMARY, and SERIAL COPY SET SUMMARY screens. This permission also allows you to use the *Delete item(s)* option on the Detail screen equivalents of each of these screens. Access to the *Delete item(s)* option on the PARTS SUMMARY and the PARTS DETAIL screen is governed by this permission or the permission to checkin serials (Permission 108).

N   The *Delete item(s)* options does not display on the PIECES SUMMARY, TYPE OF HOLDING SUMMARY, PUBLICATION PATTERN SUMMARY, LOCATION COPY SUMMARY, and SERIAL COPY SET SUMMARY screens.

Prerequisite   None.

Restriction   By sublocation.

080 - Move holdings records between bibs

Y / P   Allows you to use the *Move #(s)* option on the PIECES SUMMARY, TYPE OF HOLDING SUMMARY, LOCATION COPY SUMMARY, and PIECES/ PARTS SUMMARY screen. For the PIECES SUMMARY and PIECES/ PARTS SUMMARY screen, the *Move* option is available if you have either permission 080 or 070.

N   The *Move #(s)* option does not display on the PIECES SUMMARY, TYPE OF HOLDING SUMMARY, LOCATION COPY SUMMARY, and PIECES/ PARTS SUMMARY screen.

Prerequisite   None.

Restriction   By sublocation.

106 - Change owning information for holdings

Y / P   Allows you to change the owning information when the *Owning Locn* field is selected on the PIECES DETAIL screen (single or multiparts). When an item is filed, if the current location and the owning location is different, the system prompts "Update owning info from current info? Y/N". If you answer yes, you need this permission. You also need this permission if you update the owning information from Mass Holdings Update (CMHU).

This permission also allows you to change the institution and/or sublocation code of the owning institution.

Permission 070 *Move holdings between locations* is not the same as changing the owing information. Permission 070 moves items between locations.

N   You are allowed to see the owing information but changes are not permitted.

Prerequisite   None.

Restriction   By sublocation.

107 - Change Call numbers

Y / P   Allows you to change the Call Numbers for an item if you have permission to change the current information for holdings (Permission 69). If you have permission 69 and you have permission to change the owning information for holdings (Permission 106), you can change the Call Numbers and update the owning information too.

N   The system displays the message: You are not permitted to change the Call numbers.

Prerequisite   You must be able to change the current information for holdings (Permission 069). If you want to update the call number for owning information you must be able to change the owning information for holdings (Permission 106).

Restriction   None.

113 - Edit Publication Patterns

Y / P   You need this permission to update the information **for non-serials** on the PUBLICATION PATTERN DETAIL screen, or to use the *Add* and *Delete* options on the PUBLICATION SUMMARY screen. The system validates permissions whenever you access any function that changes publication pattern information. In addition, if you have this permission and you want to change, add, or delete publication pattern records, the system also checks that you have permissions 069, 078, and 079 (add, delete, change holdings respectively). In order to verify these permissions, the system checks which Type of Holding record is linked to this publication pattern. If permission is granted to all the parts that use this publication pattern and Type of Holding record, you will be allowed to make the changes.

If permission is not granted, the system displays the message:

`You can look but changes are not permitted.`

Serials module permission 072 (Edit serial publication patterns) is required when you update the Publication Pattern from *Publication pattern* field on the Parts Detail screen. Note that users who have permission 072 should also be given permission 113, which is needed to be able to create the first serial publication pattern for a new type of holding.

N   Access to the *Add item* option on the PUBLICATION PATTERN SUMMARY screen is not available **for non-serials**. Access to the *Delete* and *File* options on the PUBLICATION PATTERN DETAIL screen are not available. The message:

`You can look but changes are not permitted`

appears when you enter the PUBLICATION PATTERN SUMMARY and DETAIL screens.

Prerequisite   To change, add, or delete publication patterns permissions 069, 078, and 079 may be required.

Restriction   None.

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