

ADVANCE

Impact Statement

Release 6.8

November 1998

Geac

Document Version

ADVANCE Release 6.8 Impact Statement
(Release 6.8)

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Software Described

ADVANCE Library System
Release 6.8 – November 1998

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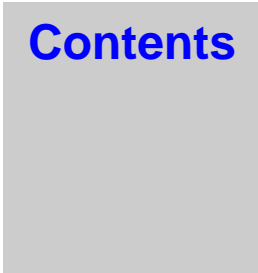
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1. Release Installation

All sites should be running under uniVerse.

Disk Space Requirements

Release 6.8 will require approximately 5% additional disk space to go from release 6.7 to release 6.8. The amount will vary depending on the site's data. The additional amount of disk space required will increase with the number of serial / multipart titles that are present on the site's system.

The following is a summary of existing file space changes :

A.MASTER	file may decrease by approximately 1%.
B.MASTER	file may decrease minimally.
A.MARC	file will increase by approximately 1.5%.
B.MARC	file will increase minimally.
PIECES	file will increase minimally.
SCPY	file will increase minimally.
SRLH	file will be deleted.
SRLM	file will be deleted.

Pre Upgrade Instructions

Install the Pre 6.8 Upgrade tape.

The pre 6.8 upgrade will not take long to install. It contains new keywords that the site needs to use to setup the tables before the installation of release 6.8. Do not proceed with the 6.8 upgrade until you have performed all the required pre-68 tasks documented in the *Pre-6.8 Upgrade Instructions*.

New files for Release 6.8

The upgrade will prompt for Modulus and Separation for the new files: LOCCPY, TOH, PARTS, PUBPAT and TOH.SHIP. Before loading the tape you should determine the file sizes, and be prepared to enter them at the run-time prompt. If the Modulus is too small, the Holdings conversion portion of the upgrade will take a very long time. Calculations to estimate the minimum modulus for each of the new files follow. They are meant as a guide to sizing but the files should be checked after the conversion to see if the files need to be resized since data can vary from site.

Required Information

The following information is needed to calculate the Modulus and separation for each file. Execute the TCL commands listed in the second column and record the results from each command in the third column. Apply the information from this table to the formulas provided for each file.

Data Element	TCL command	Value
# of PIECES	COUNT PIECES	
# of SCPYs	COUNT SCPY	
# of SRLHs	COUNT SRLH	
# of SRLMs	COUNT SRLM	
# of serial titles	COUNT B.MASTER WITH F24 # ""	
# of multivolume pieces	COUNT PIECES WITH F22 # "" OR WITH F23 # ""	
# of multivolume titles	SELECT PIECES WITH F22 # "" OR WITH F23 # "" SAVING UNIQUE F1	

1. Release Installation

LOCCPY FILE - Location/Copy

- One location/copy record is created for each separately designated copy at a specific location
- contents of each record formulates the basis for a unique 852 and, in turn, a unique MARC holdings record
- Defines one of the locations of holdings for a specific copy of a specific title including institution, sublocation, collection, call number prefixes and suffixes, call number and copy number.
- summarizes all parts/volumes held for the copy at this location
- contains leader information as well as tag information

LOCCPY File Parameters

Type = 18

Separation = 4

Average record size = 214

Overhead = 12

Number of records = # of PIECES + # of SCPYs =

Group depth = $512 * \text{separation} / (\text{record size} + \text{Overhead}) = 9$

Modulus = Number of records / group depth =

1. Release Installation

TOH FILE - Type of Holdings

- A type of holding is a unique combination of supplement/index/basic bibliographic unit and physical format
- Supports multiple active sets of publication patterns for supplements and indexes (based on 854/855 \$o).
- supports multiple active sets of publication patterns for basic bibliographic units with different physical formats (i.e. paper vs. microfiche)
- Contains a list of all possible parts that comprise this type of holding and defines the logical sequence in which the parts should display.

TOH File Parameters

Type = 18

Separation = 4

Average record size = 182

Overhead = 12

Number of records = # of serial titles * 3 + # of multivolume titles =

Group depth = 512 * separation / (record size + Overhead) = 10

Modulus = Number of records / group depth =

PUBPAT FILE - Publication pattern definition

- contains the captions/labels that identify the enumeration and chronology levels for the type of holding
- contains codes that define the frequency and regularity pattern of the publication
- one record is created for each change in publication pattern within a type of holding
- an individual part within a type of holding points to a publication pattern to get the captions/labels for proper display of enumeration and chronology
- many parts within a type of holding will use the same publication pattern to determine their captions/labels for enumeration and chronology
- the PUBPAT file will replace the current SRLM file within ADVANCE
- forms the basis of each unique 853/4/5 tag

1. Release Installation

PUBPAT File Parameters

Type = 18

Separation = 2

Average record size = 112

Overhead = 12

Number of records = # of SRLMs + # of multivolume titles =

Group depth = $512 * \text{separation} / (\text{record size} + \text{Overhead}) = 8$

Modulus = Number of records / group depth =

PARTS FILE - Parts/Volume

- One item for each known separate part/volume.
- Is equivalent to the information found in the current SRLH file for a serial-controlled title (more specifically, a PARTS record for a serial-controlled title represents a Check-in box) or the labels and enumeration assigned to numbered PIECES in the Catalogue.

PARTS File Parameters

Type = 18

Separation = 1

Average record size = 127

Overhead = 12

Number of records = # of SRLHs + # of multivolume PIECES =

Group depth = $512 * \text{separation} / (\text{record size} + \text{Overhead}) = 3$

Modulus = Number of records / group depth =

TOH.SHIP FILE - serial next expected

- one record for each unique type of holding and shipto code combination for a title
- allows different locations to have different next expected issues
- used by serials control to determine the next expected part for this shipping location
- A default TOH.SHIP record is created with a key equaling the TOH.KEY. This record contains a list of SHIPTO CODES (and SCPY records) that do predictions for this type of holding. It also contains general delay information that will be used by the system to set up TOH.SHIP records for new shiptos.

1. Release Installation

- A SHIPTO specific TOH.SHIP record is set up with a key equaling the TOH.KEY:'.':shipto.code. This record contains the next expected information for the specific shipto including any receipt delay, prediction date, etc. information

TOH.SHIP File Parameters

Type = 18

Separation = 1

Average record size = 53

Overhead = 12

Number of records = # of serial titles * 3 =

Group depth = 512 * separation / (record size + Overhead) = 8

Modulus = Number of records / group depth =

Loading and Compiling the Upgrade

The upgrade will take about 8 hours to load and compile the changed programs. There are conversions that also must be done on your database with timing calculations provided that must be added to the 8 hours to load and compile the changed programs. After the Loading, Compiling and Conversions sites are required to do a ZIPDEX - REMAP. Sites should review the timings from past ZIPDEX REMAPS to determine the timings.

Load and Compile New Software

Description	Load in new software and compile.
Can it be restarted?	Yes
Program name	SCCS.LOAD.TAPE
Timings	8 Hours

NOTE: The programs SADLIB ZIP.REBUILD.MARC.PRE and SUTILITY CONV.INDEX will not compile without errors. This is okay. These programs have been compiled as part of the pre-6.8 upgrade.

Conversions

The following conversions will be performed as part of the upgrade:

See the: Time Requirements Planning Work Sheet for a chart for calculating the conversion time.

Patron file conversion

Description	Encrypt user password in the patron file. This password is used by the system in OPAC to control access to the patron's information.
Files Affected	PATRON, CF
Can it be restarted?	No
Program name	CONV.PAT.PSWD
Timings	Rate 150,000 PATRONS /minute

1. Release Installation

1. Release Installation

Convert to New Holdings format

Description	Convert database to new holdings structure. (For more information on the conversion of holdings, see Appendix A.)
Files Affected	PUBPAT, TOH, LOCCPY, PARTS, TOH.SHIP, CALLNO, CALENDAR.XREF, CALENDAR.XREF.DATA, B.MARC, B.MASTER, POF, SCPY, PIECES, SRLM, SCLM, CF, ACQ.LISTS.
Can it be restarted?	NO
Program name	(VOC)CONV.69.HLDGS, CONVERT.HOLD.USMARC, Phantomed job to relink the PIECES to the LOCCPY file.
Timings	Rate 60,000 B.MASTER /hour

Convert CODES file for BLOCKS records.

Description	Convert CODES BLK records. Change Delete Attr. (Attr 5) from 2(Override) to 1(Manual delete)
Files Affected	CODES
Can it be restarted?	YES
Program name	CONV.BLK-CODES.DEL.ATTR
Timings	5 minutes.

Rebuild the CODES "" records*

Description	Rebuild the Codes "*" records
Files Affected	CODES
Can it be restarted?	YES
Program name	REBUILD.ALL.CODES
Expected run time	5 minutes

1. Release Installation

OPS to OHD and HDD

Description	Copy default values from OPS to OHD and HDD
Files Affected	CF
Can it be restarted?	YES
Program name	OPS.CONV.TO.OHD.HDS
Timings	5 minutes

Remove lost blocks.

Description	Program to remove lost blocks on non-lost items. Item is either checked out to another patron or not checked out at all.
Files Affected	&UFD& (report file BLOCKS.RPT), BLOCKS
Can it be restarted?	YES
Program name	CIRC.BLOCKS.LB.FIX

Conversion of B.MARC and CAT.WORK indicator.

Description	Fixer program to change indicator "B" to space in the CF ACQ.CTL*x records, B.MARC records and CAT.WORK records.
Files Affected	CF, B.MARC, CAT.WORK
Can it be restarted?	Yes
Program name	FIX.INDICATOR.B
Timings	Rate 500,000 B.MARC/30 minutes

1. Release Installation

Setup the Thesauri Handling

Description	Conversion setup routine only to be used during the release 6.8 installation. Program will read the CF SETUP.THESAURI68 setup file that should have been setup by the site as a pre6.8 setup. The CF file item contains the new DCODES for thesauri handling of the LCSH, MESH, ART, 040\$f.
Files Affected	CODES, FINSERT, SINCLUDE
Can it be restarted?	Yes (not to be used after the conversion)
Program name	CONV68.THESAURI
Timings	5 minutes.

Convert the Catalogue Bibliographic Action file to new format

Description	To convert pre 6.8 CAT.BIB.ACTION file to 6.8 format.
Files Affected	CAT.BIB.ACTION
Can it be restarted?	No
Program name	CONV.CAT.BIB.ACTION
Timings	5 minutes

Convert Catalogue Authority Action file to new format

Description	To convert pre 6.8 CAT.AUTH.ACTION file to 6.8 format.
Files Affected	CAT.AUTH.ACTION
Can it be restarted?	No
Program name	CONV.CAT.AUTH.ACTION
Timings	5 minutes

1. Release Installation

Create the new files for the Cataloguing List

Description	<p>Creates new files for each additional database.</p> <p>Program asks for input :</p> <p>Do you wish to create a New database (N) or update Existing (E)?</p> <p>Answer : E for update Existing.</p> <p>Program will ask for the Modulus and Separation for each file in each database.</p> <p>Modulus : 101 mod suggested. Prime number based on number of expected lists. Not expected number of records in lists.</p> <p>Separation : 1 sep suggested.</p>
Files Affected	CLISTS.db where db is the database code
Can it be restarted?	Yes
Program name	CREATE.NEW.CIT
Timings	15 minutes

Post Upgrade Instructions

ZIPDEX

Description	<p>For release 6.8, the database(s) must be remapped. The linkages from B.MARC/B.MASTER to A.MARC/A.MASTER are recreated and all indexes are rebuilt.</p> <p>NOTE: If the site has other databases like CIM, ABI, etc., this ZIPDEX step will need to be done for each database.</p> <p>NOTE: As of Release 6.8, the ZIPDEX REMAP process no longer uses the NEW.A.MARC file.</p>
-------------	---

Databases used by the site	<p>Check the CODES DATABASE=*record (attribute 5) to determine how many databases are installed at this site. List the databases below:</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
----------------------------	---

Setup	<p>Enter the keyword ZIPDEX on the ADVANCE Master Menu. On the ZIPDEX Setup screen, set the Type of Job field to 3 – Remap. Make sure that Database is set to the correct value depending on which database the ZIPDEX is being run on. Verify that the Working Directories in the ZIPDEX setup have adequate space for a ZIPDEX to run. When the setup is complete, File the ZIPDEX Setup record and return to TCL.</p>
-------	--

1. Release Installation

Copy Release 6.8
B.INDEX/A.INDEX Check if the NEW.B.INDEX and NEW.A.INDEX files for the database you are remapping exist. If not, create the appropriate files.

Use the CREATE-FILE command at TCL to create
NEW . B . INDEX.**db**:

File name = NEW . B . INDEX.**db**

DICT Modulo = 1
 Separation = 1

DATA Modulo = 11
 Separation = 1

Use the CREATE-FILE command at TCL to create
NEW . A . INDEX.**db**:

File name = NEW . A . INDEX.**db**

DICT Modulo = 1
 Separation = 1

DATA Modulo = 11
 Separation = 1

Clear any old data out of the NEW . B . INDEX.**db** and
NEW . A . INDEX.**db** files

```
>CLEAR-FILE DATA NEW . B . INDEX.db
```

```
>CLEAR-FILE DATA NEW . A . INDEX.db
```

COPY the contents of the new 6.8 B.INDEX and A.INDEX files into
the NEW.B.INDEX.**db** and NEW.A.INDEX.**db** files.

Note: If you are converting a database other than MAIN you must add
the suffix '**db**' where **db** is the name of the database (e.g.
68.BINDEX.CIM and 68.AINDEX.CIM for CIM conversion).

```
>COPY 68 . BINDEX . db * (O
```

```
>TO: (NEW . B . INDEX . db
```

```
>COPY 68 . AINDEX . db * (O
```

```
>TO: (NEW . A . INDEX . db
```

NOTE: You should also modify NEW.B.INDEX entries for ISN and
other numbers where multiple occurrences of the subfield are to be
indexed. See the section *Indexing 1.a) Attribute 22*.

1. Release Installation

Change CF ZIPDEX.CONTROL	<pre>>ED CF ZIPDEX.CONTROL</pre> <p>Change the conversion flag (contained in subvalue 4) from “1” to “2” in each line which has “BIB.INDEX” or “AUTH.INDEX” in subvalue 1. When the # of Processes is greater than 1, there may be multiple occurrences of this line in the control record. Each one will have to be changed. The value “2” is a special value which is used to indicate that this ZIPDEX job is an upgrade to release 6.8. Any other time that you remap the database, you will not need to change this flag.</p> <hr/>
Run instructions	<pre>>PHANTOM ZIP.SLAVE</pre> <p>You can monitor the process by:</p> <pre>>CT CF ZIPDEX.CONTROL</pre> <p>After the indexing is finished:</p> <pre>>CLEAR-FILE DATA B.INDEX.db >COPY NEW.B.INDEX.db * TO:(B.INDEX.db >CLEAR-FILE DATA A.INDEX.db >COPY NEW.A.INDEX.db * TO:(A.INDEX.db</pre> <p>NOTE: Repeat the ZIPDEX instructions for the next database in your list.</p> <hr/>
Files Affected	ZIP.WORK, ZIP.WORKA, ZIP.SORT, ZIPDEX.EXCEPTION, CATALOGING.BATCH.FILE, A.MASTER, A.MARC, B.MASTER, B.MARC, A.REF, A.TREE, QUAL.BTREES, ACN, AISNO, ALCCN,CLISTS, CN, CODEN, ISNO, LCCN, PUBNUM, WORDS, WORDS.REF, MASTER.INDEX, WORDS.BACK
Can it be restarted?	No
Timings	Site should review its past ZIPDEX remap runs for timings on its machine and database.

NOTE: All databases, e.g., Citations, CIM, must be rebuilt.
You may also want to modify CF AUTHORITY.END.PUNCT.

1. Release Installation

DELETE OLD FILES

Description	Delete the database files that are no longer required.
Files Affected	SRLM, SRLH
Instructions	<pre>>CT VOC SRLM</pre> <p>(Note where the data and dict portions of the file are located.)</p> <pre>>DELETE.FILE SRLM</pre> <p>You will get the message: Cannot delete a remote file. The system will then delete the file definition record in the VOC file.</p> <pre>>CT VOC SRLH</pre> <p>(Note where the data and dict portions of the file are located.)</p> <pre>>DELETE.FILE SRLH</pre> <p>You will get the message Cannot delete a remote file. The system will then delete the file definition record in the VOC file.</p> <p>At the Unix level <code>cd</code> to the directory containing the SRLM and SRLH files. Use the <code>rm -i</code> command to remove the data and dictionary files (SRLM, D_SRLM, SRLH, D_SRLH).</p> <pre>>ED ADV.SYSTEM FILES</pre> <p>Find the lines with SRLH and SRLM and replace the line with null. Do not delete the lines. You should have the same number of lines that you started with when you edited the system files.</p> <pre>:FI</pre> <pre>>COMPILE.FILES</pre>

POST.QUALIFIER

Description	Reset database qualifiers if site uses qualifiers.
Files Affected	CF, CODES, LOCCPY, QUAL.BTREES, B.MASTER, A.MASTER
Instructions	From the ADVANCE Master Menu, type PQUAL.
Can it be restarted?	Yes
Timings	Site to review its past POST.QUALIFIER runs for timings on its machine and database.

NOTE: Review Additional DCODES.

1. Release Installation

CONTROL/OPAC/OSUP/OS - Review Dcodes

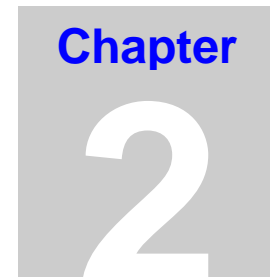
Description	Add DCODES for the various Thesauri to the OPAC Search Descriptors
Files Affected	SCOMM
Can it be restarted?	Yes
Timings	Minimal changes required. Rate 5 minutes

NOTE: If you've added thesauri Dcodes for LCSH, MESH, etc., then you need to add new thesauri Dcodes to OS codes. OPAC Searches (OS) for B.SUBJECT formerly contained only the S Dcode. Now it should contain Dcodes S \ < [] or whatever sites use for multiple thesauri.

OPTIONAL

Review the default definitions on the following tables:

- the Holdings Display Definition (HDD) on the Holding Setup Menu (CHSM)
- the OPAC Holdings Display (OHD) on the OPAC Search Setup Menu.



2. Description of Changes

General

Permissions

This is an enhancement to the system security for all modules.

Users are now assigned permissions for reports that they are allowed to run.

Function	Restriction	Permission Number
Run reports from specific report group	Qualify by REPORT GROUP codes	073
Edit reports from specific report group	Qualify by REPORT GROUP codes	074

Ability to not allow a user access to specific keywords. This is set up using the Keyword table option in EACC when editing a user's ADV permissions.

Forward option is the default option when displaying a long list of permissions for GPERM and PSSWD keywords. ADV7715

2. Description of Changes

Import / Export

1. Changes to the Bibliographic export program to allow export of holdings information. ADV8508
2. Changes to the export program (UABE) to allow:
 - Embedded holdings if applicable
 - Export of holdings from Level 1 to Level 5
 - Allow the system to export holdings in a format that can then be loaded into another ADVANCE system. The new format is defined as level 6 on the UABE screen. This format exports an 852 and 953 tag for each barcoded piece found in the system.

Refer to the Cataloguing Management Guide (November 1998) for additional information.

Z39.50 Server

1. Export the 953 (Geac holdings tag) when exporting holdings to the client. ADV7744
2. Implementation of Cataloguing lists searching on GeoPac. ADV8751
The cataloguing lists index can be searched via the Geos Clients using the Concept Reference use attribute(1015). ADV8733
3. Added ability to update the CIM database through GeoCat. ADV8762
4. New functionality added to produce holdings information in the format required by the Geos Clients. For USMARC syntax: If the title is a serial, an 852 tag is produced containing the summary holdings statement in the repeating \$3 subfield. If the title is not a serial, an 852 tag is produced for each barcoded piece. The \$y subfield, in this case, contains the item's circulation status. If the piece has part information attached, the numbering information for the piece is contained within the \$3 subfield. For OPAC syntax: The Geos client will get back a level5 holdings record for each copy of the title. Within the level 5 record will be 957 tags containing the summary holdings statement that would have appeared at the level 4 holdings level. This summary holdings statement will be displayed by the client before detailed holdings information are displayed. ADV8684
5. Added the '<Prov.>' and bibliographic usage counts to the authority database scans for z39.50. This enables sites to identify provisional name records (created by the system) from LC names without having to display the authority record. ADV8062

2. Description of Changes

Utilities

1. At the end of the zipdex job, clean up the control records which were used during the zipdex. These control records did not cause any problems by being left around. ADV7768
2. Changes to ZIPDEX to allow new databases to be created with holdings information. To test this, export using UABE (Level 6) and then use ZIPDEX (type 1 - new database) to load in a new database. ADV8716
3. Changes to the ZIPDEX remapping process. A ZIPDEX remap no longer uses the NEW.A.MARC file. Please update any existing ZIPDEX documents that may have instructions to copy the NEW.A.MARC to the A.MARC file at the end of the ZIPDEX process. This instruction is no longer valid.

Holdings

Overview

The ADVANCE holdings database has been modified so that it reflects the architecture of the USMARC holdings information defined in the USMARC Format for Holdings Data standard, Update No. 2, July 1994. Within this new design, the holdings database structures of serial and monographic records are aligned. This results in a consistent presentation of holdings information for serial and monographic records.

Holdings maintenance functions are available using the :

- CEHI keyword in the CAT, ACQ and SER modules and then choose the Holdings edit option
- CEH keyword in the CIRC module and then choose the Holdings edit option
- CHKM keyword in the SER module

Holdings maintenance functions include:

- Creation, maintenance and deletion of barcoded material
- Creation maintenance and deletion of any other holdings that are not barcoded including physical as well as electronic holdings
- Checkin of serial issues
- Transfer of holdings information between physical locations
- The ability to transfer holdings information from one title to another
- The ability to edit the bibliographic record from Holdings edit.
- The ability to see how the title will display to users of the OPAC without leaving the holdings edit function
- The ability to see the Acquisitions orders for a particular title without leaving the holdings edit function
- Binding of serial issues into a barcoded piece
- Ability to sequence the numbered parts that make up a title and thereby control the sequence that pieces display to the OPAC user
- Standardization of the labels (captions) used for numbered pieces on a title by allowing the user access to labels already used for this title. In previous releases, labels were entered onto a pieces record as free text fields and, if consistency of labels between pieces on a title was

2. Description of Changes

required, the user creating the pieces record was required to type exactly the same label.

- The ability to jump (using the Go to option) between functions within Holdings edit
- The ability to create the holdings structure as one integrated maintenance or by updating each component of the structure separately. You do not have to back out of a function to do something else. For example, when creating a piece, the user can create parts records for each numbered part as required without having to create the parts record first.
- Allow the user to maintain minimum binding information such as colour, number of parts and binding notes
- The ability to enter and maintain public notes, staff notes and notes about the physical condition of an item. The library now choose to display public notes to the OPAC user.

Cataloguing

New Permissions.

Users are now assigned permissions for tasks that they are allowed to perform. This is similar to the permissions implemented in ACQ.

- ADDITIONAL DETAILS Tag Definition Table for changing, adding, and deleting tags.
- Ability to not allow a user access to specific keywords. This is set up using the Keyword table option in EACC when editing a user's cataloguing permissions.

Function	Restriction	Permission Number
Add MARC records	qualified by 'A' - Authority or 'B' - Bibliographic	075
Change MARC records	qualified by 'A' - Authority or 'B' - Bibliographic	068
Delete MARC records	qualified by 'A' - Authority or 'B' - Bibliographic	076
Merge and replace MARC records	qualified by 'A' - Authority or 'B' - Bibliographic	077
Add holdings	qualified by SUBLOCATION codes	078
Change current information for holdings	qualified by SUBLOCATION codes	069
Change owning information for holdings	qualified by SUBLOCATION codes	106
Delete holdings	qualified by SUBLOCATION codes	079
Move holdings between locations	qualified by SUBLOCATION codes	070
Move holding records between bibs	qualified by SUBLOCATION codes	080
Change Call numbers		107

2. Description of Changes

2. Ability to prevent users from changing an authority record which was created by another institution (040\$a) or which is not under local control of this library (attribute LOCAL.CTL of MARC record) except to add, change or delete a local 4xx cross reference (\$5 = library's NUC symbol). This check is controlled via the CSOP Cataloguing Enhanced Setup Options "1. Restrict authority record changes by institution." ADV7694
3. When editing the MARC record, the permission validation logic is such that the specific add, change and delete permissions for tags (defined in the Tag definition table) are determined by the first match that the tag makes within the table. For example, if you have a specific permission required for tag 100, make sure that tag 100 appears in the Tag definition table before the definition for 1** (any tag starting with 1). ADV7704
4. Allow creation of barcoded pieces from Bibliographic Edit through the use of 852 and 953 tag pairs. The definition of the 852 subfield 3 has been enhanced to allow the specification of chronology as well as enumeration information.
5. Added (CSOP keyword) Cataloguing Enhanced Setup Options to enable/disable additional USMARC bibliographic and authority record checking and authority matching rules. These checks are additional to the site-specified record checking defined in BTSD/BTSE and ATSD/ATSE. This table is installed with all options set to blank (optional checks not applied). For details see the Cataloguing Management Guide (November 1998). ADV8648
6. The Holdings Setup Menu (CHSM) in CAT has been changed to have more setup options. The new keywords are in italic and bold in the following sample screen.

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 Label Codes.

The Cataloguing Holdings Display Definition (HDD) menu contains tables for the Library's definition of 14 holdings Summary displays. Note that the former OPAC Setup table OPAC Pieces Setup (OPS) is replaced and enhanced by the HDD table and the OPAC Holdings Display (OHD) tables. The OPS settings are

2. Description of Changes

converted during the upgrade. Defaults are provided for the new table.

The screen identifier (keyword) 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.

```
16 SEP 1998          Geac ADVANCE Library System (6.8)          DEFAULT1 AU
13:45                ADVANCE Development 6.8

                          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 :
```

The Holdings Display Definition (HDD) 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 columns by identifying a source code that links the required information to a list of available codes. This replaces the previous method utilized by OPS to specify content.

2. Description of Changes

```
16 SEP 1998          Geac ADVANCE Library System (6.8)          DEFAULT1 AU
   13:50              ADVANCE Development 6.8

                          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 or <ENTER> to exit :
```

Indexing

1. Three new attributes have been added to B.INDEX: 22, 23, 24
 - a) Attribute 22: Create separate access points for repeated subfields (i.e. 010\$z, cancelled/invalid LC Control Numbers; 020\$z, cancelled/invalid ISBN.)

Prior to release 6.8, indexing of ADVANCE was mostly based on indexing headings.

An indexing profile that included a repeatable subfield created a single access point with all occurrences of that subfield concatenated together. This was perfectly correct for subfields like subject subdivisions but it was not for cases like the USMARC 010‡z.

Release 6.8 allows the indexing profile to specify whether to create a single access point for all occurrences of the subfield or whether to create a separate access point for each occurrence of the subfield. This is specified in attribute 22 in B.INDEX/A.INDEX and defined by either a zero or one. This field is repeatable (multi valued) for each index access point defined for a tag.

If the attribute value is:

- 0 — all subfields are to be concatenated together and indexed as one entry.
- 1 — each occurrence is to be indexed separately. Cannot be used in conjunction with an authority (field 11=1).

2. Description of Changes

Example: in uniVerse

```
Example : TAG 010
0001: a}b}z
0007: LCCN}LCCN}LCCN
0008: LCCN}LCCN}LCCN
0022: 1}1}1
```

- b) Attribute 23: Allow extraction of the subfields which relate to the name or title portion of a tag.

This field in B.INDEX can contain a 'pivot' subfield to be used for extraction. Its purpose is to allow the extraction of subfields which relate to the name portion or the title portion of a tag without getting the subfields of the other. Some subfields are present in both parts of the field and therefore only their position (before or after) the subfield tells us which portion the subfield belongs to. The pivot field can be set to "<x", ">=x" or left blank. "<x" will limit the extraction to only those subfields prior to the subfield x. ">=x" will limit the extraction to only those subfields after (and including) the x. This field applies to the creation of authority records, indexing, and joining of tags. It will affect the display in the Browse Summary screen. This field is repeatable (multivalued) for each index access point defined for a tag.

The B.PIVOT attribute is defined for B.INDEX and A.INDEX in attribute 23.

Example 1: Tag 100

```
0001: a{b{c{d{k{q
0007: A.TREE
0010: 1AM
0023: <t
```

For tag 100, the B.PIVOT value defined for indexing the author (the first value mark) is set to '<t'. This means that only the subfields that are prior to the \$t in the 100 tag will be used as the author portion. If there is no value in attribute 23 then all valid subfields from the B.INDEX field 1 and field 2 in the tag can be used as the author portion.

Example 2 : Tag 400

```
0001: a{b{c{d{f{k{l{n{p{q{t | f{k{l{n{p{t|x
0007: A.TREE | A.TREE | ISNO
0010: 1QM | T
0023: | >=t
```

2. Description of Changes

For tag 400, the B.PIVOT values defined for indexing the title (second multivalued - DCODE T) is set to '>=t'. This means that only the subfields that are after and including the \$t in the 400 tag will be used as the title portion. If there is no value specified in attribute 23 then all valid subfields from B.INDEX field 1 and field 2 in the tag can be used as the author or title portion.

The ADVANCE release 6.8 pre-release conversion sets up default values for the B.PIVOT (attribute 23) field in the B.INDEX and A.INDEX files. The defaults are as follows:

- Tag 100, 110, 111 B.PIVOT first multivalued is set to <t.
 - Tag 400, 410, 411, 600, 610, 611, 700, 710, 711, 800, 810, 811 with DCODE set to "T" is set to >=t.
- c) Attribute 24: Prior to release 6.8, all non authorized subfields in a tag in the bibliographic record would appear after the authorized subfields even if entered into the bibliographic tag in another order. In release 6.8, the user can specify the relative order that the system will use to interfile authorized and non-authorized subfields in a bibliographic tag when an authority record is changed. This new field for ordering subfields only needs to be defined for bibliographic tags that have both authorized and non-authorized subfields and when the non-authorized subfields would not naturally appear in the bibliographic tag after the authorized subfields. The system only needs to do any ordering when the authority record is altered and it is reapplied back into the bibliographic record. If there is a value in the B.SUBFLD.ORDER field for the B.INDEX entry, the system will use the order of the subfields in the authority record and the order of the non-authorized subfields in the bibliographic record and the contents of the B.INDEX B.SUBFIELD.ORDER field to interfile them back together. The order of the non-authorized subfields remains the same but may have the new authorized subfields intermixed.

This new field in B.INDEX is a grouping of subfields that is comma ',' delimited for subfield ordering. From the B.SUBFLD.ORDER field for the B.INDEX entry, ADVANCE determines which group authorized or non authorized subfields are in and thereby determines whether one subfield is filed before or after another subfield. (A subfield in the first group will file before a subfield in the second group.) This field is NOT repeatable (multivalued) for each index access point defined for a tag. There is only one subfield order.

Example 1: B.INDEX 100

2. Description of Changes

0006: a{b{c{d{k{q

0024: abcdequ4,fglnpt,6

^ ^----third group

^ ^-----second group

^-----^first group

Start with a Bibliographic tag :

100 \$a \$b \$c \$e \$u \$q

The subfield 'e' and 'u' are not authorized.

The Authority tag has the following subfields:

100 \$a \$b \$c \$q

Add subfield 'd' to the Authority tag

100 \$a \$b \$c \$d \$q

The Bibliographic tag is changed to :

100 \$a \$b \$c \$d \$e \$u \$q

The user has inserted the new subfield 'd' after subfield 'c' and before subfield 'q' in the authority tag. This will create the same order of authorized subfields in the bibliographic tag but the system will interfile the non-authorized bibliographic subfields that are between the subfield 'c' and subfield 'q' in the bibliographic tag. The subfield 'd' is in the first group and the non-authorized subfield 'e' from the bibliographic tag is also in the first group. The authorized subfield 'd' will interfile before the non-authorized subfield 'e' because the authorized subfields take priority over the non-authorized subfields of the same group.

Example 2. If the authorized subfield is in the first group and the non-authorized is in the second group then the authorized subfield will appear before the non-authorized.

Example 3. If the authorized subfield is in the first group and the non-authorized is also in the first group then the authorized subfield will

2. Description of Changes

appear before the non-authorized. The authorized takes priority over the non-authorized.

Example 4. If the authorized subfield is in the second group and the non-authorized is in the first group then the authorized subfield will appear after the non-authorized.

The system does NOT sort the subfields into the order in attribute 24. It is only used for the interfiling of the authorized and non authorized subfields in the bibliographic record.

The system is not limited on the number of groups that can be setup for one tag.

The system will always keep the order of the subfields as keyed in when entering them from the bibliographic record.

If a subfield is not in the B.SUBFLD.ORDER field for the B.INDEX entry then it floats. It is treated as if it belongs to the same group as the subfield that appears before it in the bibliographic tag.

NOTE : This field replaces the setup in Tag & Subfield Descriptions (BTSD). BTSD displays this field. ADV8768

The ADVANCE release 6.8 pre-release conversion sets up default values for the B.SUBFLD.ORDER (attribute 24) field in the B.INDEX and A.INDEX files. The defaults are as follows:

<u>Tag</u>	<u>B.SUBFLD.ORDER</u>
100	abcdequ4,fglnpt,6
110	abceu4,flpt,6
111	acdegqu4,flpt,6
130	adfgghklmnoprst,6
240	adfgghklmnoprs,6
243	adfgghklmnoprs,6
400	abcdequ4,fglnptvx,6
410	abceu4,flptvx,6
411	acdegqu4,flptvx,6
440	anpvx,6
600	abcdequ4,fgghlmnoprst,vxyz,236
610	abceu4,fgghlmnoprst,vxyz,236
611	acdegqu4,fgghlpst,vxyz,236
630	adfgghklmnoprst,vxyz,236
650	abcde,vxyz,236

2. Description of Changes

651	a,vxyz,236
653	a,6
654	abc,vxyz,236
655	abc,vxyz,236
656	ak,vxyz,236
657	a,vxyz,236
690	abcde,vxyz,236
700	abcdequ4,fghlmnoprstx,356
710	abceu4,fhlmoprstx,356
711	acdegqu4,fhklpstx,356
730	adfgghklmnoprstx,356
740	adfgghklmnoprstx,356
755	a,vxyz,236
800	abcdequ4,fghlmnoprstv,6
810	abceu4,fhlmoprstv,6
811	acdegqu4,fhklpstv,6
830	adfgghklmnoprstv,6
840	adfgghklmnoprstv,6

ADV7611, ADV7612, ADV7753

- d) New Dictionaries for the B.INDEX file. B.EACH for indexing each occurrence of a tag's subfield. B.PIVOT to be used for extraction. B.SUBFLD.ORDER ordering of subfields only needs to occur on tags that have both authorized and non-authorized subfields together. ADV8767
2. Ending punctuation logic longer strips '...' from the record. Also, a new default CF AUTHORITY.END.PUNCT is provided for new installations. See the Patch 14 Impact Statement.
3. The sorting normalization sequence has been standardized. The sequence now deals with the non-filing indicator, then diacritics, case, leading articles (through stopword article code and associated lists), punctuation and finally numbers. The stopword article code processing is used for something which is either not MARC based or a MARC format which does not use non-filing indicators.
4. Leading Articles. Added a new option to the CART/DART commands to check whether to apply the system leading articles when the non-filing count in a bibliographic tag is zero. If this new option is set to 1 (yes), a zero non-filing count would mean do not strip any characters and do not apply the leading articles list. This is new for release 6.8. In previous releases, the system would always apply the

2. Description of Changes

system leading articles list even if the non-filing count was zero. To keep the option the same as prior releases, sites would answer 0=no. Blank, null and 0=no are all treated the same. ADV8586

5. Standardized all usages of diacritics conversions which appeared in various programs to use the standard includes SFINSERT DIACRITICS.REPL.ANSI (use common area initialized by CAT.COMMON.INIT) and SINCLUDE STRIP.DIACRITICS. This will make the display of converted and stripped diacritics consistent.
6. Keyword normalization changed to deal with diacritics, then case and then punctuation. ADV7611
7. Improvements to ADVANCE indexes. A.MARC file content left intact (ie. looking at A.MARC from TCL, the 4xx/5xx subfields are left in the record). The system still rebuilds the record when related authorities have changed, but simply makes it so that they don't have to be rebuilt all of the time. A.MARC was done at this time to facilitate note word indexing of the title portion of 4xx name-title cross references. Without making this change, the ZIPDEX NOTE step would have had to rebuild all the A.MARCS again. ADV7753
8. Index the words of the 4xx field to the authority. In this way, word searches for words contained in the 4xx will find the authority. Note that sites could also use the new feature of B.INDEX setup, the Pivot subfield, to put the title portion of the name-title 4xx into the title word index. This allows an authority search "TW=WAR AND PEACE" search to find the Tolstoy authority:

```
100 a Tolstoy, Leo
      t Voina i mir
      l English
400 a Tolstoy, Leo
      t War and Peace
```

ADV7753

9. Cataloguing changes include ZIPDEX conversion routines. - added ability for ZIPDEX to index authority control numbers - JOIN logic works from a sub valued list of join tags - leave subfield codes in MARC records for authorized data - updated ZIPDEX routines to 6.8 cataloguing specifications. ADV7613
10. Do not index cross references with \$w/3=a. ADV7699
11. Do not index see references by keyword. ADV7738

2. Description of Changes

12. Do display cross references in keyword searches. ADV7738
13. Authority searches (scan/browse) automatically return the referenced heading(s) for any see reference. It currently does this for bibs. ADV7738
14. When doing a ZIPDEX, if one of the new provisional records matches with an existing provisional record, take the new provisional record instead of the existing. In this way, new defaults (which are created from improved logic) will be used. ADV7761
15. Cosmetic enhancement to the PQUAL output. The system was displaying each and every authority key when processing the see references. This could tie up communications lines when run remotely. Changed it so that only every 1000 keys are displayed. ADV7771
16. Added tag 953 to B.MARC.TAGS to allow the creation of PIECES records during Bibliographic editing. ADV8718

Authority Control

1. Esc1 hot key search now gives an extra feature when the user retrieves the authority. If the retrieved authority is not compatible with the current bibliographic tag, the tag is changed. (i.e. from a 700 tag search out and retrieve an authority with a 710 tag, the bib tag is automatically changed to 710). Also makes it so that when a name-title entry is retrieved into a 1xx, it will only insert the appropriate name portion. When it is again retrieved into a 240, it inserts the appropriate title portion. ADV7753
2. Enable the editing of cross reference records. Previously the authority representing 4XX tracings could not be retrieved and edited. The system now creates 1XX traced reference authority records which can be retrieved by LCN and edited; updates are reflected in the 4XX in the established heading record. ADV7611
3. When the user attempts to Delete an authority, ADVANCE checks for both bibliographic and cross-reference linkages. If the current authority record is traced as a 5XX on other authorities, these tracings must be removed before the current authority can be deleted. The bib 6XX 2nd indicator is now reset to the correct value based on the current authority for the tag. ADV7698
4. Handle the situation where a 110 first indicator 1 and only a subfield \$a maps to a 151 authority entry. When updating bibs with authority changes, since 151 indicators are undefined, the bib gets indicators 1B.

2. Description of Changes

151 authorities with 008/14=a are now included in the author index.
ADV7702

5. Do not update the tag 005 date for any authority that has not been created locally. Retain the original 005 from the LC database so that cataloguers can compare whether they are using the LC current version and they do not want their local editing of the authority (adding local 4xx's) to change the date. ADV7716, ADV7717
6. All the defaults for the authority 008's are now coded in the program SINCLUDE CAT.BIB.AUTH.CREATE.US. The values are based upon the source field/subfields and indicators for USMARC.
ADV7718
7. Changes for the provisional authority record defaults:
 - 008/10 is 'c' if bib leader/18=a otherwise 'a'
 - 008/12 is 'b' (multi part series) for personal name-title series
 - 040\$f goes between a and c subfields.ADV7732
8. Even though the USMARC authority manual says that 008/32 should be 'n' for all series entries, do not test this during the edit checks. LC's records do not conform to this standard. ADV7748
9. Even though the USMARC interdependencies section of the authority manual dictates that 008/17 must be 'n' for an established heading, all of LC's records created in the past decade or so have '|'. This change allows the position to be 'n' or '|' for an established heading so that LC records will pass the filing validation. ADV7731
10. Improvements for the handling for displaying LOCAL in the authority browse for z39.50. Only display LOCAL if 008/33 is equal to "c".
ADV7825
11. Change the Cataloguing MARC edit checks so that when records are being merged, a check is done to ensure that the user has permission to change the starting records to the newly merged records. This applies to editing permissions and validation of what can be done to the record. ADV7726
12. Automatically delete any provisional record that is no longer required (when the last record gets unlinked from it). Only delete those records which were originally created by ADVANCE, have a 'level of

2. Description of Changes

establishment' of 'c' (008/33) and contain no fields other than 8, 40 and 1XX. ADV7727

13. In Authority Cataloguing AMC if the user tries to file a blind provisional record with only tags 008,040, 1XX, warn the user that the system will delete it. ADV8668
14. Improved the logic for the record comparison used to create the edit logs. Previously, if the only difference between a field's indicators was that in one of the records the indicators were padded out with more blanks, it was reporting this as a change. It should not. Most of the time this change only occurred because the system ran through the record padding with blanks in order to fill the indicators out to the maximum length. This wasn't really a change by the user. ADV7762
15. The release 6.8 authority merging is improved in that it will allow headings to merge that didn't before (before it would sometimes abandon a user requested merge because the nonfiling indicators were different). The system now allows any two authorities to be merged provided that the new authority meets the needs of existing usages for both records being used. That is, you cannot merge a 100 & 150 authority which both have bibliographic usages and keep the 150 tag as the heading, if there are bibliographic 1xx, 4xx, 7xx or 8xx references. However it works as long as all the users of the 100 were 600's. ADV7763
16. Authority loader has been brought up to 6.8 specifications. Handling for tracking the cataloguing reports. Bib and authority merges now handle multiple merges and always retain the first key that you started with. ADV7822
17. The CSOP check for 245 1st indicator must not be zero if there is a 1XX is not applied to bibliographic level s (serial) or record types c and d (printed music and music manuscripts). ADV8060
18. Enhanced the authority loader so that it always does both the heading match and control number matching. This resolves instances where a heading (which is already loaded and has the LCCN) changes but before the library has a chance to load the tape they load a bib record from some MARC supplier which already uses the new form of the heading. When this happens, at the time the library does get around to load the authority tape both the old full authority with the old heading exists and so too does the provisional record for the new heading. We want to match and replace both records in this case (i.e. merge the two headings and replace with the new authority record). ADV8061, ADV8065

2. Description of Changes

19. Logic for the A87X and A9SEE prep processing has been moved to CAT.BIB.INDEX.A87X and CAT.BIB.INDEX.A9SEE respectively. ADV7611, ADV8734

DCODES

1. Added 11 new DCODES to the system. The new DCODES are: [\] > ! # \$ % () ~ . ADV8621
2. The setup of the Subject Thesauri DCODES is now soft coded. There are FINSERTS AND SINCLUDES to tailor the Thesauri options. Default Thesauri DCODES are LCSH = \, MESH = [, ARTS=] and OTHER = >. Tailoring of these DCODES can be done as part of the Pre-release 6.8 (THES68 Thesauri DCODE Setup). ADV8621
3. Put in see/see also tracing if equivalent DCODE. An equivalent DCODE is any DCODE which for the same usage flag of the 008 could generate a different DCODE based on the information in the cross reference record. Thesauri differences would not be an example of this because all cross references must belong to the same thesauri as the host record. A & T are examples since it is only the tag 130 vs 100, 110, 111. Set up AUTH.DCODES.EQUIV.advmarc. ADV7611
4. Coded index DCODES for authorities. Non-authorities can only use letters. They cannot use the digits.

ADVANCE release 6.8 now reserves specific DCODES to be assigned to the authority controlled tags based on the content of the USMARC authority record. Tag 8 positions 14-16 and the 1XX tag will determine what DCODES are assigned. This is to improve the assignment of DCODES.

The reserved DCODES are “M,C,A,G,S,P,Q,B”.

- a. Check for tag 008 position 9 (kind of record)
If the tag 008 position 9 (Kind of record) is equal to a “c” (traced reference) then the DCODE is set to “C”. Otherwise the DCODE will be an “M”.
- b. Check for authority 1XX tag number.
 - If the tag is a 100 then it also gets a DCODE of ‘1’.
 - If the tag is a 110 then it also gets a DCODE of ‘2’.
 - If the tag is a 111 then it also gets a DCODE of ‘3’.
 - If the tag is a 130 then it also gets a DCODE of ‘4’.
 - If the tag is a 150 then it also gets a DCODE of ‘5’.
 - If the tag is a 151 then it also gets a DCODE of ‘6’.

2. Description of Changes

- If subfield = 'a' then it also gets a DCODE of '2'
 - If the tag is a 153 then it also gets a DCODE of '7'.
 - If the tag is a 154 then it also gets a DCODE of '7'.
 - If the tag is a 155 then it also gets a DCODE of '8'.
 - If the tag is a 156 then it also gets a DCODE of '7'.
 - If the tag is a 157 then it also gets a DCODE of '7'.
- c. Check tag 008 position 14 (heading use - main or added entry)
If tag 008 position 14 (heading use - main or added entry) is equal to 'a' (appropriate) then check:

- if the database is the Community Information Module 'CIM'
- check if tag is a 110 it gets a DCODE of "B".

If tag 008 position 14 (heading use - main or added entry) is equal to 'a' (appropriate) and not 'CIM' then check if the tag is 130 then it also gets a DCODE of "G". If it is not a tag 130 then it gets a DCODE of "A".

- d. Check tag 008 position 15 (heading use - subject added entry)

If tag 008 position 15 (heading use - subject added entry) is equal to 'a' (appropriate) then check is tag 008 position 11 (subject heading system / thesaurus) = "z" (other) then check for a tag 040 subfield 'f' (Cataloging source, subject heading/thesaurus conventions). If the tag 040 subfield f equals 'rbgenr', 'rbbin', 'rbpap', 'rbpro', 'rbpri' then it also gets the DCODE of "OTHER".

If tag 008 position 11 (subject heading system / thesaurus) is equal to "a" then it also get the DCODE for "LCSH".

If tag 008 position 11 (subject heading system / thesaurus) is equal to "c" then it also get the DCODE for "MESH".

If tag 008 position 11 (subject heading system / thesaurus) is equal to "r" then it also get the DCODE for "ARTS".

If none of the above number 4 checks match then it also gets the DCODE of "S".

- e. Check for tag 008 position 16 (heading use - series added entry)

If tag 008 position 16 (heading use - series added entry) is equal to 'a' (appropriate) then check is the tag 130 then it also gets a DCODE of "P". If it is not a tag 130 then it also gets a DCODE of "Q".

2. Description of Changes

5. Must move linkage codes to link on 'Z' or 'C' plus lower case letters of their linkage type. The 'Z' and 'C' links are there to handle the link for cross references which through their particular values (e.g. 008/14-16=bbb) have no linkage DCODES.
6. M and C Dcodes are not available for library definition. A.MASTER keyword indexes are reserved to the 'M' and 'C' and are only indexed according the overall DCODES of the authority (i.e. ATDCODES - built by AUTH.DCODES.ADV MARC).

Cataloguing / General

1. Changes to the cataloguing reports RF253,254,255,256,258,259,260, & 261 and all the setup tables in CSAL regarding the catalogue edit reports. The control tables in cataloguing (for the cataloguing reports) are now consolidated in one table (CSAL) rather than 3 separate tables (CSAE, CSAR, CSAS which were available from the menu CSAL). The system now allows you to report: additions, changes, deletions and/or merges (via the catalogue editing reports (bib & auth, brief or detailed), you can report the creation of provisional authority records (including a description of the conflict which caused the creation of the provisional record) and you can choose to flip or not flip conflicts with 4xx and/or report on them. ADV7821
2. Allow the user to enter repeating tags and subfields into a Cataloguing workflow record by defining the Occurrence number of the tag or subfield that they are entering/updating. One benefit of this change is that users can now enter repeating b subfields in their 852 and 953 tags within a workflow. ADV8575, ADV8576
3. Global Change Utility. Summary of Changes. ADV8583

The Global Change function has several new features:

- All Global change profiles are able to be stored for retrieval at a later date
- The user is now be able to select records based upon a TCL SELECT statement, a TCL GET.LIST, an OPAC search, in addition to control number range.
- The user is able to look for multiple strings in a single process.
- The user is able to search for strings that span subfields.
- The user can make multiple change to records in a single process.
- Actions available:

2. Description of Changes

- Change: string, tag number, subfield code, indicator(s), fixed field offset data.
 - Delete: string, record, tag, subfield
 - K = count only
 - Any change in an Authority record will cause the application to check if a potential duplicate authority will be created.
 - The Count action, and the Report only action have been moved to a run-time option.
 - The Change confirmation and the Delete confirmation actions have been removed. The request to be prompted for confirmation of a change has been moved to a run-time option.
 - The current entry Search Criteria will be reduced to one line for display. If selected a new screen will be presented.
 - The current entries "2. Function", "3. Search String", "4. Case Sensitive", "5. Exact Word", "6. Replacement String", "7. Case Sensitive" and "9. MARC Fields" are replaced by "Action table".
4. Two new dictionary routines for locating/displaying MARC tag data have been created. DICT.MARC.FND.TAG.SUBF will locate the specified tag (passed from the "I" type dictionary), prefix the subfield data with a dollar sign, followed by the subfield character and a space then the subfield data. DICTs using this subroutine can then be used in an ACCESS statement to find specific tag and subfield data records (ie SELECT B.MARC WITH FND.650a = "\$x History.")
DICT.MARC.DSP.TAG.SUBF will locate the specified tag, convert the SVM marker(s) to a blank in the tag's data. If subfield(s) are passed in either SUBR call, then only the data from those subfields will be returned/displayed. ADV8673, ADV8674

Example dictionary:

```
ED DICT B.MARC DSP.650ab
001: I
002: SUBR( "DICT.MARC.DSP.TAG.SUBF" ,@ID,@RECORD,650,"ab" )
003:
004: Tag 650 $a & $b
005: 35T
006: M
```

OPAC

1. All keyword searches now proceed to Title Summary without first displaying the Heading Summary .
2. Ability to not allow a user access to specific keywords. This is set up using the Keyword table option in EACC when editing a user's Online Public Catalogue permissions.
3. New OPAC Holdings Display Definition (OHD). Replaces the OPS Pieces display setup. ADVANCE supports level 1,2,4 and 5 holdings. All levels of holdings screen layouts are site definable. In addition the OPAC Holdings threshold table allows the Library to specify the maximum number of copies that can be displayed at Level 2 and Level 4. When exceeded, the Level 1 holding will be displayed. The threshold is defined for institution, sublocation, collection. The system is installed with a default of no threshold, i.e., blank.
4. Self renewal from Patron Inquiry. ADV7535, ADV7537
5. Ability for patrons to change their own passwords from Patron Inquiry. ADV7535, ADV7537
6. Enable OPAC users to see all orders, including cancelled ones. For cancelled orders, display the cancellation date. Setup via the OPC port control keyword. ADV7540
7. Cataloguing List.

Allows the library to add a bibliographic record to library-defined cataloguing lists by adding 9xx tags (default 958) into the

2. Description of Changes

9. Insert ' / ' between multiple notes (public and non-public) when displaying in OPAC and on the PIECES SUMMARY screen.
ADV8418
10. Last received issue and last received date display following the holdings statement for each type of holding that is serial controlled.
This is set up in the OPAC Display (OHD) Level 4. ADV8482

Circulation

Holdings edit

1. New Permissions : Users are now assigned permissions for tasks that they are allowed to perform, which is similar to the permissions implemented in ACQ. Defaults to Y for all permissions except 087 which defaults to N.

Function	Restriction	Permission Number
Change Checkout date and time		081
Change due date and time		082
Override administrative hold on patron		083
Override max items checked/time limit		085
Override max items in possession limit		084
Override patron group loan period		086
Override maximum renewal limit		087
Change Checkin date and time		088
Suspend/Resume charging fine at Checkin		089
Waive overdue fines during Checkin		090
Remove traces for missing items		091
Cancel holds		092
Change hold scope		093
Allow copy specific hold		094
Change hold priority level		095
View patron records	qualified by Sublocation codes	096
Change patron records	qualified by Sublocation codes	097
Add patron records	qualified by Sublocation codes	098
Delete patron records	qualified by Sublocation codes	099
Add patron blocks	qualified by Patron Block codes	100
Delete patron blocks	qualified by Patron Block codes	101
Process payment transactions		102
Waive fines in Accounts Receivable		103

2. Description of Changes

Function	Restriction	Permission Number
Open and Close cash registers		104
Access to RBR processing		105

Ability to not allow a user access to specific keywords. This is set up using the Keyword table option in EACC when editing a user's Circulation permissions.

2. In CCT, fields 7 (access to patron details) and 8 (update patron details) have been removed and the functionality replaced and enhanced by two new circulation permissions.:

Function	Restriction	Permission Number
View patron records NOTE: Patron display in CPR, COUT, HRT, CLPC, & CLPD requires this permission. In OPAC - PAT, user also needs this permission to see the details of the patron	by patron home sublocation	096
Change patron records NOTE : If the patron record only has Institution code but no Sublocation code then it can be edited by the user who has access to any of the sublocations of this institution. Circulation reports 137, 138 and 177 have permission 096 applied to them. ADV8010	by patron home sublocation	097

Acquisitions

Permission Changes

1. The following permission has been added to the Acquisitions module:
 - Allow user to see financial data in vendor records qualified by Library code 071. Default is N.
2. Ability to not allow a user access to specific keywords. This is set up using the Keyword table option in EACC when editing a user's Acquisitions permissions.

Code Changes

1. In ACP, the UPMDB processing code and its related process (Acquisitions to OPAC Transfer) has been deleted.

Keyword Changes

1. Added a new keyword, FUNT, that allows the user to do fund amount totaling online at any level in the fund structure hierarchy (ADV8386)

Report Changes

1. Added new reports for exchange agreements (ADV8405)
2. Added a new Audit Trail report showing journal entries, orders and invoices that have affected a fund's balances during the current fiscal year. (ADV8411)

Ordering Changes

1. When an order is created, filed or received and the Transfer flag is set to 'Y', the update to the Catalogue is done immediately. No more ACP / UPMDB (Acquisitions to OPAC Transfer) since the transfer is now done online in real-time.
2. A serial order is now linked to Type of Holding records instead of Publication patterns. The Serial publication option has been replaced by the Type of holdings option on the ORDERING DATA screen

2. Description of Changes

3. It is now possible to link an order to specific numbered parts in the Catalogue
4. When an order cancellation is transferred to the Catalogue and the bibliographic record is left with no holdings after the system has deleted the location and piece records originally created by the order, the system issues a message to the user, 'All holdings have been deleted from this bib XXXXXXXX'. The purpose of the message is to bring the user's attention to the bibliographic record because it may need to be deleted from the Catalogue. This information used to be conveyed to the user via the Cancelled Order report that was produced by the UPMDB job.
5. When an order for a multipart is originally transferred to the Catalogue, instead of creating an 'on order' piece for each ordered copy, the system will create a location copy record for each ordered copy.
6. In previous releases, if you filed a request/order record and the library had chosen to edit check ACQ MARC records, the MARC record would be edit checked and any errors would be displayed to the screen. If the user then attempted to file the record again, the edit checks were ignored and the user was allowed to file the record. In Release 6.8, if you have edit checking turned on, you can only file the record if it passes the MARC edit checking routine.
7. The prompt, "Do you wish to delete the bibliographic record from the workfile ?" now appears when you have filed or exited from the order screen.

Receiving Changes

1. The MULTIPART ORDER DISPLAY – NUMBERING screen has been changed to allow the user to link an order to specific numbered parts in the Catalogue.
2. The Type of Holding option is available from the STANDARD LOCATION DISPLAY screen in Receiving

Serials Control

Permission Changes

1. The following permissions have been added to the Serials Control module:

Function	Restriction	Permission Number
Edit publication patterns		072
Checkin serials	qualified by SHIPTO codes	073

2. Ability to not allow a user access to specific keywords. This is set up using the Keyword table option in EACC when editing a user's Serials Control permissions.

Code Changes

1. CHK.IDENT - Checkin Identifier (keyword CHKI) - removed from the system
2. CHK.TYPE - Checkin Type (keyword CHKT) - new prompts added to allow the library to identify gap and non-gap breaks in its holdings.
3. CHRONOLOGY - Chronology codes (keyword CHRN) - new prompts for handling chronology that contains split years
4. FREQUENCY - Frequency codes (keyword FREQ) - new description for specifying frequencies of 'every 4 years', 'every 5 years' and 'every 10 years'
5. PHYSICAL.FMT - Physical format codes (new keyword PHYS) - each code contains a description. The system is released with all of the valid codes present.
6. PUB.REGULAR - Publication Regularity (keyword PREG) - added another valid type that allows the user to specify exactly the dates in a year on which an item is published. This is released as code U in the PREG table.
7. In SCP, the SDEL processing code and its related process (Delete COPY SETS and their HOLDINGS) have been deleted.

2. Description of Changes

8. In SCP, the SHLD processing code and its related process (Build Summary Holdings) have been deleted. The system now builds summary holdings statements on the fly.
9. Serial User Defaults (keyword CUDEF) - new prompt for a default checkin SHIPTO code has been added
10. PUB.PATTERN - Publication Pattern Type codes - keyword used to be PATT but has now been changed to PUBP

Keyword Changes

1. The QCHKM, HLDM and PUBM keywords have been removed from the Serials Control module. These functions are all available from the SERIAL COPY SET SUMMARY screen in CHKM after choosing the Go to option.

Prediction Changes

The prediction algorithm has been enhanced as follows:

1. Ability to predict split year chronology
2. Ability to predict serials that are published every 4 years, every 5 years and every 10 years.
3. Ability to specify exactly which dates a title is published using the new PREG code 'U'
4. Ability to specify expected date, receipt delay and claim delay based on the SHIPTO location of the material . This allows different SHIPTO (receiving) locations to have different expected dates.
5. Implementation of the Calendar change field for material with continuous numbering on one of its enumeration levels. This allows the library to specify when the next higher level of enumeration increments (by specifying either months or dates).
6. When entering chronology values for chronology levels that have valid predictions defined (see Valid predictions field in the CHRN code record), case sensitivity is no longer required. The valid predictions field in the CHRN(Chronology Codes) table can contain upper and lower case characters. The user can now enter any combination of upper and lowercase characters into the chronology field and still get a valid match. For example, if the CODES record contains Jan]Feb]March as valid predictions, the user can enter MARCH,

2. Description of Changes

march, March, etc and the system will respond by accepting the value of March into the record.

7. There is no limit to the number of sets of publication patterns that can be defined for predicting the arrival of material for a title. In previous releases, a limit of one Issue, one Index and one Supplement type set of publication patterns was allowed. Through the use of type of holding records, the library may define as many sets as needed.
8. The library may now define which types of material are expected for specific copy sets. In previous releases, all copy sets for a title expected all of the possible types of material. Using this feature, the library can set up subscriptions for paper copies of a journal that expect monthly issues as well as other subscriptions for microfiche copies that are expected every 6 months. In previous releases, separate title records would have to be set up to accomplish this.

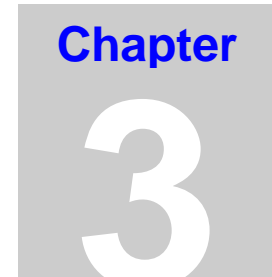
Checkin Changes

The serials checkin process has been enhanced as follows:

1. Ability to checkin issues for a specific receiving (SHIPTO) location without affecting issues at other receiving locations
2. Ability to choose which type of material (issues, indexes, loose leaf, etc) is being checked in
3. Ability to see the vendor code, purchase order number, routing status, order type and notes for the copy set that is being checked in
4. The name of the checkin screen has changed to include the receiving (SHIPTO) location and type of material that is being checked in. For example, CHKM - CHECKIN FOR Central – Paper Issues.
5. The contents of the checkin box have been rearranged as per user suggestions. For example, the enumeration and chronology fields are now combined and the date field has been moved from the first line of the box to the second last line.
6. The user may now set a default receiving (SHIPTO) location in his/her CUDEF (User Defaults) record.
7. When items are checked in for copy sets that are to be routed, let the user know if there is no printer defined for printing the routing slips. Also, when the printer setup is okay, inform the user that routing slips are printing with the message, 'Routing slip(s) are now printing'.

2. Description of Changes

8. The Prior screen option has been added to the Checkin screen. This option will take you back to the screen you were on prior to the Checkin screen
9. Access to all of the holdings functions (publication pattern maintenance, copy set maintenance, bibliographic editing, etc) is available from the checkin function
10. The system no longer automatically retrieves a record after searching the OPAC. The Retrieve option must be used to bring the record into Serials before checkin can be done.
11. The SERIAL COPY SET SUMMARY screen which replaces the CHKM - COPY SET SUMMARY DISPLAY screen from previous releases is user definable using the HDD keyword in CAT.
12. The Binding list option which appears on the SERIAL COPY SET DETAIL screen prompts the user for a barcode when the user changes the status of issues from 'In bindery' to 'Bound'. If a barcode is specified by the user, the system will create a PIECES record for this barcode.
13. A new Checkin Type code, 'Not expected', has been created which displays when a checkin box exists for a specific numbered part but the copy sets that are being checked in (based on SHIPTO code) neither expect nor hold the specific part.



3. Upgrade Timing Data

Time Requirements Planning Worksheet

Description	Guideline	Computed Time	Actual Time
Load and Compile	8 hours		
Patron password encryption	150,000 PATRONS/minute		
RF Index Rebuild	5 minutes		
Setting up User Access records	2 minutes		
CODES Conversion Program	5 minutes		
Convert database to new holding structure	60,000 B.MASTER /hour		
ZIPDEX PIECES relink	545,000 B.MASTER /hour		
Converting Block codes	5 minutes		
Rebuild CODES master records	5 minutes		
Setting up default data on OHD and HDD	5 minutes		
Extraneous block LB fix	11,000 BLOCKS/minute		
Fix blank Marc Indicators	500,000 B.MASTER /hour		
Setup Thesauri handling	5 minutes		
Convert Bib. Edit log files	5 minutes		
Convert Auth. Edit log files	5 minutes		
Existing Citation Databases	15 minutes		
Reset application file checksum	5 minutes		
Reset option file	5 minutes		
Compile server programs	5 minutes		
Total for automated upgrade			

Post-Upgrade Process

Description	Guideline	Computed Time	Actual Time
Remap ALL Databases	Site should review its past ZIPDEX remap runs for timings on its machine and database.		
Post qualifiers	Site should review its past POST.QUALIFIER runs for timings on its machine and database.		
Create DCODES for Thesauri	5 minutes		
Total post-upgrade process			
Total Upgrade time			



A. Holdings Conversion Details

Description

General - New Holdings format

- Chronology values that contain dates with '-' (dashes) have been converted to contain '/' (slashes) instead of dashes.
- Chronology code records that predict dates with '-' (dashes) in their formats have been converted to contain '/' (slashes) instead of dashes.
- Copy set (SCPY) records that do not have a SHIPTO code defined will be assigned a default SHIPTO code as defined in the SHP68 keyword that is part of the pre-release setup.
- Each 856 tag present in the bibliographic record (B.MARC) is removed from the bibliographic record and is added to the MARC Holdings portion of the electronic location record created for the title. The location information for the electronic location record is defined in the ELS68 keyword that is part of the pre-release setup.
- Captions (labels) for enumeration and chronology are standardized using the CAPTION ABBREVIATION STANDARDIZATION table defined in the CAS keyword that is part of the pre-release setup. This standardization allows the library to control which captions (labels) are used in its system. For example, the library may wish to change all of the variant spellings of the volume caption (v, vol, V, Vol, Volume) to one standard caption, v.

A. Holdings Conversion Details

- All captions (labels) used for enumeration and chronology are converted to include punctuation (i.e. a ‘.’ at the end of the caption).
- Any ‘on order’ pieces that are linked to multipart or serial orders are deleted from the title. For a multipart order, each ‘on order’ piece is replaced by a location copy (LOCCPY) record that represents one copy of the multipart order.
- Each change in captions (labeling) results in the creation of a new publication pattern (PUBPAT) record. This is true for both multipart and serial titles.

Single-part titles – a bibliographic record is converted as a single-part if none of the pieces for the title have numbering and the title does not have copy sets

- Single-part titles (those) are converted by moving the location information from each PIECES record and creating a location copy (LOCCPY) record containing this information. Each location copy record is then linked to the specific PIECES record that it was created for. There is a one-to-one correspondence between PIECES and LOCCPY records for a single-part title.

Serial titles - a bibliographic record is converted as a serial if the title has copy set (SCPY) records attached to it

- If the serial record has basic issue, index or supplement publication pattern sets defined, a type of holding (TOH) record is created for each set of publication patterns. The publication patterns for each of these types are then created and linked to the new type of holding record. The descriptions of these type of holding (TOH) records are ISS, IND and SUP respectively. All copy sets (SCPY) for a serial are linked to each of the type of holding records representing the sets of publication patterns from the previous release. After conversion, the library may choose to change the linkages for specific copy sets.
- All active copy set (SCPY) records on a title, regardless of SHIPTO code, will be converted with the same next expected date, claim delay and receipt delay. After conversion, these values can be changed so that material for one SHIPTO location has a different expected date than the material for other locations.
- The location information is removed from each copy set (SCPY) record and a new location copy record is created to contain this information. There is a one-to-one correspondence between the SCPY and LOCCPY records.
- A parts (PARTS) record is created for each serial checkin box that appeared in the previous release. Data from the previous release’s SRLH records is converted into the new PARTS file structure and

A. Holdings Conversion Details

linkages to the SCPY, LOCCPY, PIECES and PUBPAT files are created.

- PIECES that were linked to copy set (SCPY) records in the previous release are checked to determine if the location information on the PIECES record exactly matches the information on the LOCCPY record that was created for the copy set. If the information is not exactly the same, a new location copy (LOCCPY) record is created for the title and the PIECES record is linked to the new LOCCPY.
- Retrospective holdings notes for copy sets that were previously defined using the 'Local holding edit' option are linked to the first type of holding created for the copy set during the conversion. These notes will display prior to the system generated holdings statement for the first type of holding.

Multipart and Serial titles - a bibliographic record is converted as a multipart if any of the title's PIECES records has information in the Volume/Part# field in the previous release and the title does not have copy sets

- One type of holding (TOH) record is created for the title. The description of this type of holding is 'Bound PIECES'.
- PIECES that are not linked to a copy set (SCPY) will not be linked to the copy set's location copy (LOCCPY) during the conversion.
- If a PIECES record on a serial or multipart title has no data in the Volume/Part# field in the previous release, the PIECES record is assigned a caption of (Unknown.) and numbering of '???'. This new publication pattern (PUBPAT) record containing the label of (Unknown.) and the new part (PARTS) record containing the numbering of '???' are linked to a type of holding (TOH) record with a description of 'Bound PIECES'.
- For each unique set of location information (as determined from the information in the previous release's PIECES records that are not linked to copy sets), a new location copy (LOCCPY) record is created. Multiple pieces can then share the same location copy (LOCCPY) record. This structure is equivalent to having a multivolume set consisting of multiple barcoded volumes that reside in one physical location.
- SERIALS ONLY: for each new and unique numbering found on a PIECES record, a new part (PARTS) record is created on the title. All of the different locations that have PIECES with that exact numbering

A. Holdings Conversion Details

and labeling are then linked to the part (PARTS) record. If two pieces with exactly the same location and numbering information exist, the system will create a second part with the same numbering as the first. This is equivalent to having two checkin boxes with the same numbering information but different checkin information.

- **MULTIPART ONLY:** each unique combination of numbering and labeling found on a PIECES record results in the creation of a publication pattern (if one does not already exist with the same captions) and a part (PARTS) record (if one with the same numbering and linked to the same captions does not already exist). The part (PARTS) record is then updated to include the location copy (LOCCPY) record for the piece. If the part (PARTS) record is already linked to the PIECE's location (the part already exists at this location), a new location copy record is created and the new location is linked to the part record. This is equivalent to having a multivolume set consisting of volumes 1 through 3 at Location 1 and a second set consisting of only volume 2 at Location 1. Even though the locations are the same, we want to keep track of the fact that there is a second, even if incomplete, set .



B. Cataloguing Lists

Cataloguing Lists allows you to create library-defined search categories, such as a Bestseller List or a New Books List. Because the bibliographic tag used to define these lists is repeatable, the same title can appear in more than one list. These selections can be added to your search screen.

Set-up Summary

1. Select a tag 9xx that will be used for the Cataloguing list, i.e.: 958
2. Define the tag in BTSD
 - add subfields \$a and \$b
 - \$a - Cataloguing list code
 - \$b - Date
 - Privilege Level set to 0
3. Define the tag in BTSE
 - Tag is repeatable, not required and is not a fixed field
 - Valid indicators are blanks
 - \$a is not repeatable, required and not a fixed field
 - \$b is repeatable, not required and not a fixed field
4. Modify SFINSERT GEAC.MARC.TAGS if you don't want to use tag 958
 - Change 'TO 958' to 'TO nnn' where nnn is the tag number you use
5. In TCL, create an item in B.INDEX
 - Record ID = the tag # that is chosen in step 1, e.g.: 958
 - This record should have 9 attributes
 - Attribute 1 contains 'a'
 - Attribute 5 contains '958' **regardless** of which tag # is chosen in step 1.
 - Attribute 7 contains the Index file name CLISTS
e.g.: ED B.INDEX 958

```
          958
0001: a
0002:
0003:
0004: 958
0005:
0006:
0007: CLISTS
0008:
0009:
```

B. Cataloguing Lists

6. In OSC, add a search command, e.g.:CL
Define Bibliographic Search to L.CATLIST
7. Run CLIST in OPAC
 - Add the Cataloguing list codes, eg: BESTSELLER
8. Set up a search button on the Search Selection screen for a default search:
 - In OSSS, add a field
 - Set the Type to 3 (Subroutine)
 - Set the Subroutine to call :
OPAC.CATALOGUING.LIST=BESTSELLER (BESTSELLER is the Cataloguing list code defined in CLIST. You can use any valid code after the '=' sign)

Implementing Cataloguing Lists - Detailed Description of Steps

1. Create a table for Cataloguing List codes:

A new keyword CLIST has been created in OPAC, and appears on the Online Search Setup menu (OSUP). CLIST sets up a table for defining Cataloguing list codes. Each code has only a description associated with it.

CLIST

```

                                CATALOGUING LISTS

Number of records : 2
Code                Description of code
-----
1. BESTSELLER      Best seller book list
2. NEWTITLES       New book list

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

2. Define a tag to associate with the Cataloguing list:

GEAC.TAG.958 (defined in SFINSERT GEAC.MARC.TAGS) is set to define the tag that will be used for the Cataloguing list.

You may select your own tag and assign it to the variable GEAC.TAG.958, and then compile the program CAT.MARC.EDIT.CHECKS:

```
CB SADLIB CAT.MARC.EDIT.CHECKS
```

Set up the tag i.e.:958 in TAG AND SUBFIELD VALIDATION (BTSD) and TAG & SUBFIELD EDIT CHECKS (BTSE):

- There are only 2 valid subfields for this tag

B. Cataloguing Lists

- \$a - Cataloguing list code
- \$b - Date
- Tag is repeatable, not required and is not a fixed field
- Valid indicators are blanks
- \$a is not repeatable, required and not a fixed field
- \$b is repeatable, not required and not a fixed field

BTSD

```

TAG AND SUBFIELD VALIDATION

Tag : 958

1) Description      : Cataloguing list tag
2) Short Label     : T958
3) Reorder Subfields :
   1 = All    0 = Non-Authority Only
   null = No reordering

Valid Subfields   : a,b

4) Subfield       : a
   Description    : Cataloguing list code
   Short Label    :

5) Subfield Reordering and Combinations:

6) Privilege Level for Tag: 0

Options: Please enter number(s) for this option
? help # line Del subfield Delete File Exit
```

BTSE

```

TAG & SUBFIELD EDIT CHECKS

MARC tag or (L)eader : 958      Cataloguing list tag
Format               : BK Book & monographs

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

Subfields entered : a,b

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

Valid Subfields : a,b

Options: Enter specified line number
? help # line Line by line Del subfield Delete File Exit
```

Create a B.INDEX item with ID = the tag number, and assign

B. Cataloguing Lists

```
line 1 : a  
line 4 : 958  
line 7 : CLISTS
```

‘a’ and ‘958’ are mandatory and cannot be changed.

Line 4 should be 958 regardless of the tag you have chosen in step 2.

‘CLISTS’ is the file that is used to contain the indexes.

3. Validate the Cataloguing tag (958):

In Bibliographic MARC Cataloguing (BMC), when the Cataloguing list tag, i.e.:958 is entered in the MARC record, if the code is not a valid Cataloguing list code, the system will display this message when filing or reformatting:

```
1) 958$a: Invalid Cataloguing list code.
```

4. Index the Cataloguing list tag (958):

When filing the record, the system indexes the MARC record ID into the index file (i.e.: CLISTS). If it is the first item in the Cataloguing list, it will create the list. When removing the tag 958, it will also de-index it. If it is the last item in the list, the list will be deleted. The tag 958 is repeatable, so you can index a title into more than one Cataloguing list.

5. Set up a search command:

To make use of the Cataloguing lists, you should set up a search command in OPAC.

A new Search type called ‘L’ has been created.

In OPAC Searches (OS), the search code L.CATLIST should be used to search the Cataloguing list. Create a Search command (i.e. :CL) in Search Commands (OSC), which makes use of this L.CATLIST search code.

The index file as specified in L.CATLIST should be ‘CLISTS’ which is the same as in B.INDEX attribute 7.

B. Cataloguing Lists

6. Search the OPAC using the Cataloguing List code

By specifying the command i.e.: CL with the Cataloguing list code, for example:

CL=BESTSELLER

you can search the Cataloguing list and a list of titles will be displayed on the Title Summary screen.

If the Cataloguing list code is not correct, the system displays the Search Syntax Analysis screen:

```
Search Syntax Analysis

Your search was:
CL=BEST

Invalid Cataloguing List Code specified

Options:  Edit Search Command
          Edit search  Browse search  Prior screen  New search  Reset  ? help
```

If you select the Browse search here, you get a list of valid Cataloguing list codes. Once you select the correct code, you will proceed to the Title Summary screen.

7. Set up a default search button on the OPAC Search screen:

- a.) In Search Selection Screens (OSSS), add a field
- b.) Set the Type to 3 (Subroutine)
- c.) Set the Subroutine to call :
OPAC.CATALOGUING.LIST=BESTSELLER
(BESTSELLER is the Cataloguing list code defined in CLIST.
You can use any valid code after the '=' sign).

B. Cataloguing Lists

Example: OSSS screen

SEARCH SELECTION SCREEN FIELD DEFINITIONS		MASTER
SCREEN CODE : DETAIL	FIELD NUMBER : 40	
1. Column : 48		
2. Row : 8		
3. Display Label :	Bestseller List	
4. Highlight for Display Label (0=No highlight , OR 1-18) :	0	
5. Type (0=text , 1=menu , 2=command , 3=subroutine) :	3	
6. Help text (only if type = 1 , 2 or 3) :	Browse Titles from the BESTSELLER List	
7. Database Code (only if type = 2):	Command Code:	
8. OPAC Screen (only if type = 1) :		
9. Subroutine to call : OPAC.CATALOGUING.LIST=BESTSELLER		
Options: Enter specified line number		
Accept	Line by line	# line Show menu Delete ? help Exit

When the button is set up, you can position the cursor to the button on the search screen, and simply press <return>. It will display the Title Summary screen for the specified cataloguing list.

B. Cataloguing Lists

8. View the OPAC Title Summary screen:

Main Online Catalogue - Title Summary		
Browsing Cataloguing List: CL=BESTSELLER		
Author/Title		Year
1. Sandburg, Carl, 1878-1967		1950
The great Toni sound PIII		
2. Trusted, Jennifer		1979
The logic of scientific inference : an introduction		
3. Fischer, Wolfram		1975
Sozialgeschichtliches Arbeitsbuch		
4. American Holistic Medical Association		1980
Journal of holistic medicine		
5. Helen Dwight Reid Educational Foundation		1972
History		
6. Lanl: The New York times [microform]		1857
7. Sullivan, Eloise		
Library Journal		
8. Suny sequence test, number 1		

68 titles in list
Options: Enter lines (e.g. 1 or 1,2 or 1,2,4 or 1-4 or 1,3-4 etc.)
line(s) Forward Prior screen Sort All Review search
OPAC parms New search Reset Output #(s) ? help

Options

Sort - The Sort option gives you a list of options for sorting

Review search – The Review search option displays one of the following messages on the Review search screen, ie:

You executed the search:

CL=BESTSELLER

or

if you come from the default search button, you will see:

You searched the Cataloguing List : BESTSELLER

OPAC parms - You can apply the Qualifier on the Cataloguing list.

File Structure

The structure of the index file CLISTS :

Record ID : Cataloguing list code

Attribute 1 : A list of LCN separated by VM

Implementation of Cataloguing List Searches in GEOPAC

1. Define the attribute number used by Z39.50

In OPAC Searches (OS), select L.CATLIST item and assign 1015 to the Z39.50 - Bib Use Attribute on the second screen.

OS

```
OPAC SEARCHES

OPAC SEARCH : L.CATLIST
----- ( Page 2 of 2 )
1. Z39.50 - Bib Use Attr.      : 1015

Options:  Enter specified line number
Backward ? help # line Line by line Copy Print Delete Exit
```

2. Activate attribute 1015 – Concept-reference index on Client

In GEOPARMS – Activate the search index ‘Concept-reference’ (1015)

3. GEOPAC Search

To search by Cataloguing list code, select the Concept-reference index and enter the Cataloguing List code.

If it is not a valid Cataloguing list code, the system will return the message “No records found”.

Click the Scan button if you want to browse the valid Cataloguing list codes (It displays from the beginning of the list). You may then click the code to do the search.