OCLC Amlib
Library Management System

Amlib Catalogue Training

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OVERVIEW

Catalogue records store the bibliographic details of the items within a given collection. As such they allow users to search for and identify works within a collection grouped by author, title, subject, etc.

The *Authorities* and *Stockitem* modules are closely linked with the *Catalogue* module.

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

Amlib stores the data in USMARC, which is the international standard. This is made up of hundreds of Tags, which identify data. On the whole, libraries only use approximately 10% of the available tags. In the same way that Dewey numbers become familiar, common tags become known.

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

Please Note: Nearly every tag has an "**a**" Subfield tag, with the exception of **260 | Publisher**, which can exist without the "**a**" subfield tag (Place of Publication) and **856 | URL**.

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

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

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

RDA (*Resource Description and Access*) was implemented in March 2013 and is a transition from (*Anglo-American Cataloguing Rules*, second edition), mainly to consider the variety of formats available beyond print.

Changes to make description and access more attainable with a focus on helping users more effectively includes less abbreviations

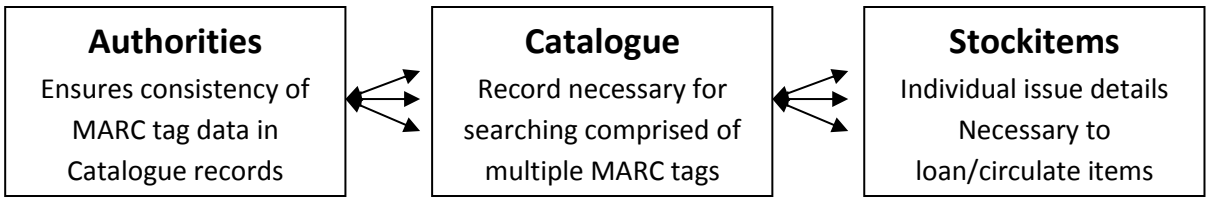
Changes in Amlib should be minimal but will include:

- New Marc Tags (for example MARC field 264 which will replace field 260 in RDA records) as well as 33x Marc Tags
- Change to Worksheet and Cataloguing Worksheet Templates (Lead Thru Sets)
- Change to Stockitem Form Display Tags
- Change to NetOpac Display Tags

See the RDA Implementation Guide available from our Content Portal

The course will cover 6 main Sections:

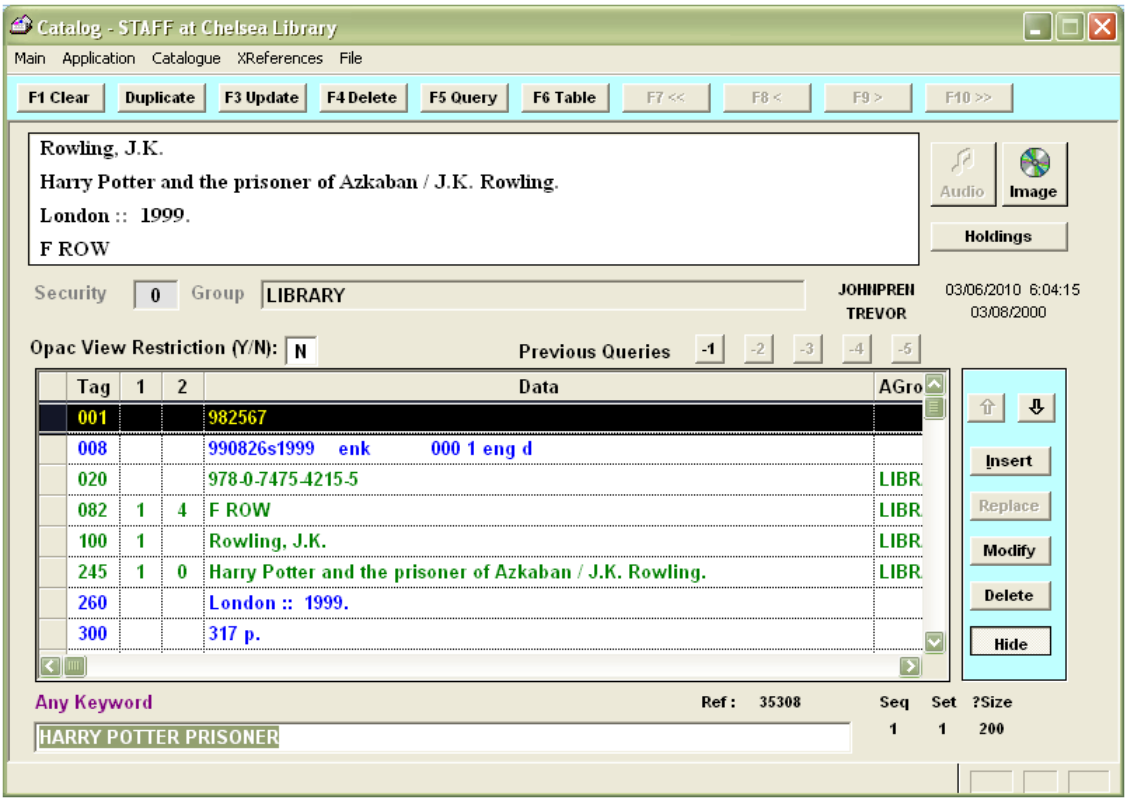
- Section 1: Main Catalogue Screen & Search
- Section 2 : Creating Catalogue Records – Manually and through Marc Import
- Section 3 : Modifying Catalogue records
- Section 4 : Parameters
- Section 5 : Maintenance
- Section 6 : Reports



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

SECTION 1: MAIN ENTRY SCREEN

1. Launch the *Amlib* client
2. Go to **Main** > **Catalogue** > **Catalogue** (or the icon) – the Catalog screen will display:

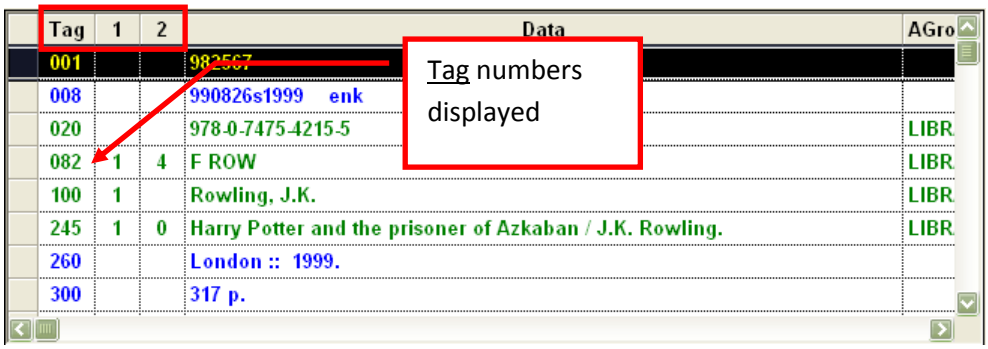


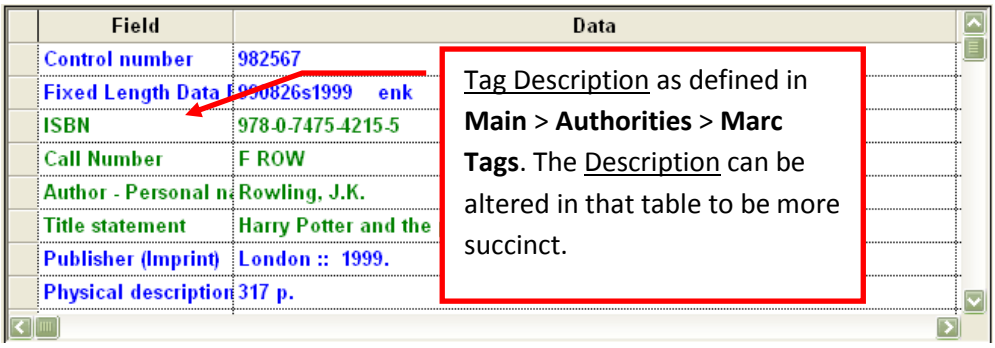
The window in the top part of the Catalog screen displays a brief summary of the bibliographic details: usually *Author*, *Title*, *Publisher* and *Call Number* details (as defined in the Set Up Display Tags screen)

The full details can be viewed with the Tag Number of Descriptor.

Tag Display

1. The display can be changed by simply clicking on the Tag heading to toggle between the Tag number and Field (Tag Description):



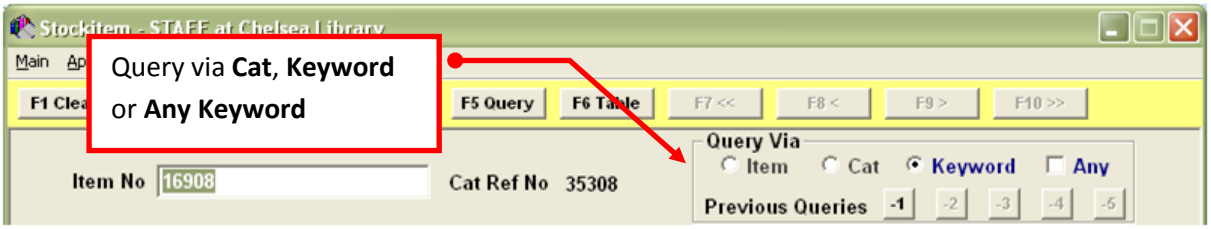


SEARCHING FOR CATALOGUE ITEMS

Catalogues may be searched in a number of ways depending upon how parameters have been defined at your installation. You may also find Catalogue records by XReferencing from the *Authorities* and *Stockitem* modules.

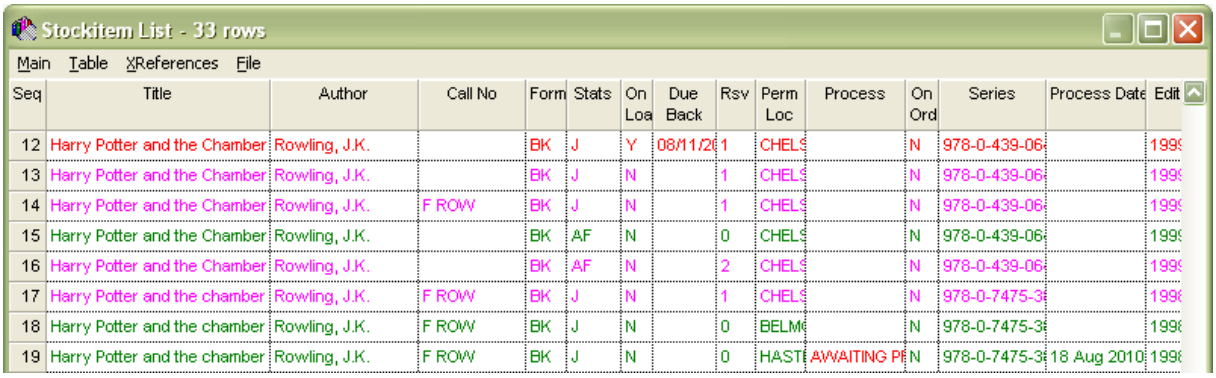
Stockitem

1. Launch the *Amlib* client
2. Go **Main** > **StockItem** > **Stockitem** – the Stockitem screen will display
3. Enter a search term

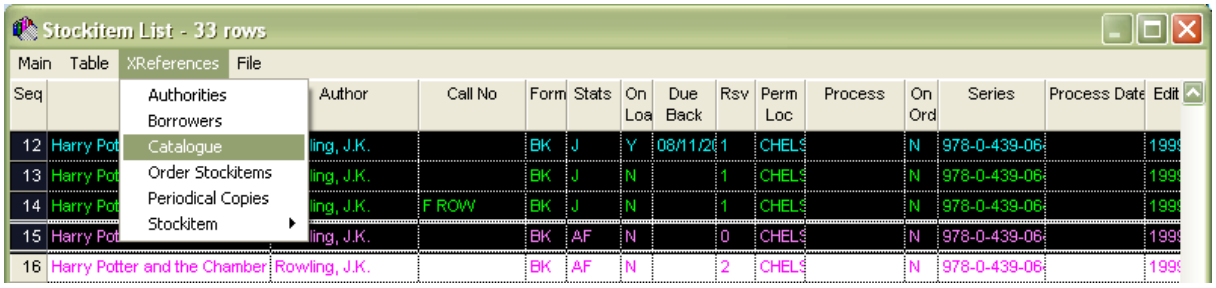


QUERY VIA	
Item	Browse search for data displayed within the Stockitem application
Cat	Browse search for data displayed within the Catalogue application
Keyword	Searches any keyword using the line the Search Term was entered (the six lines available within Stockitem are usually Title, Author, Subject, Series, Publisher or Call No). Typing in the Subject line will search only Subject keywords.
Any	Searches for any keyword, even if the Search Term was entered in the Title line, the keyword will be searched across ALL Keyword codes in Title, Author, Notes, Subject, etc.
Previous Queries	The last 5 searches are kept in case they need to be re-performed. Use the **-1** to **-5** buttons to select a previous search

4. Click the **F5 Query** button to initiate the search
5. The results will be displayed in a Stockitem List:

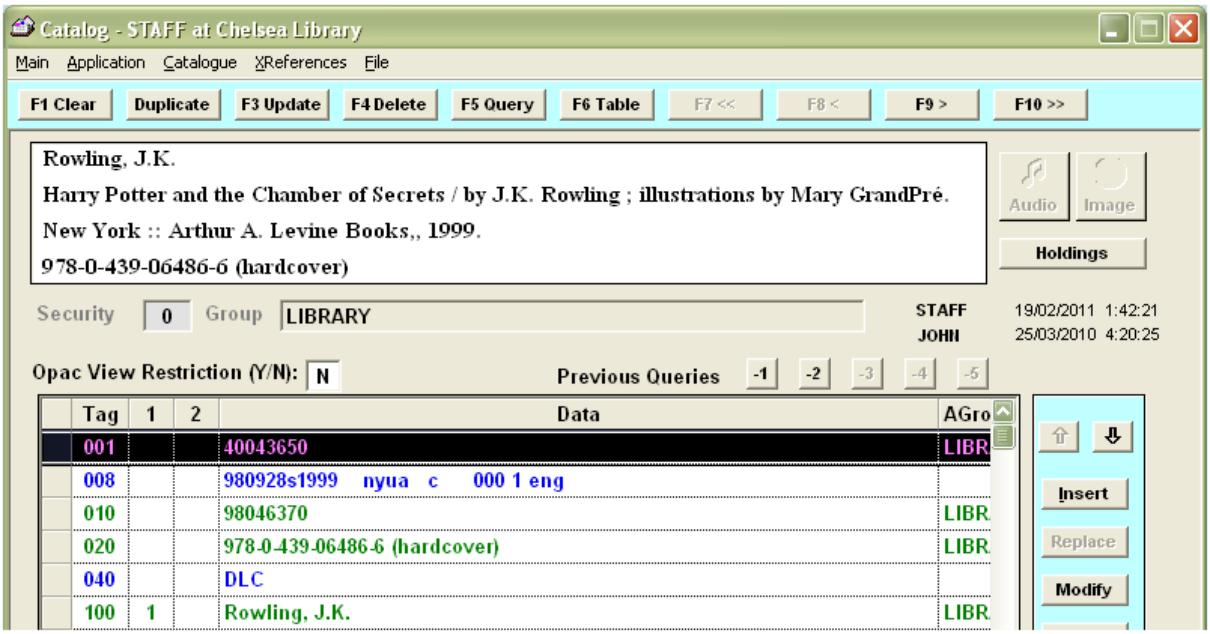


6. Highlight the Stockitems for which you'd like to see the Catalogue records and select **XReferences** > **Catalogue** from the main menu:



7. The matching catalogue records of the selected items will then display in a Catalogue List:

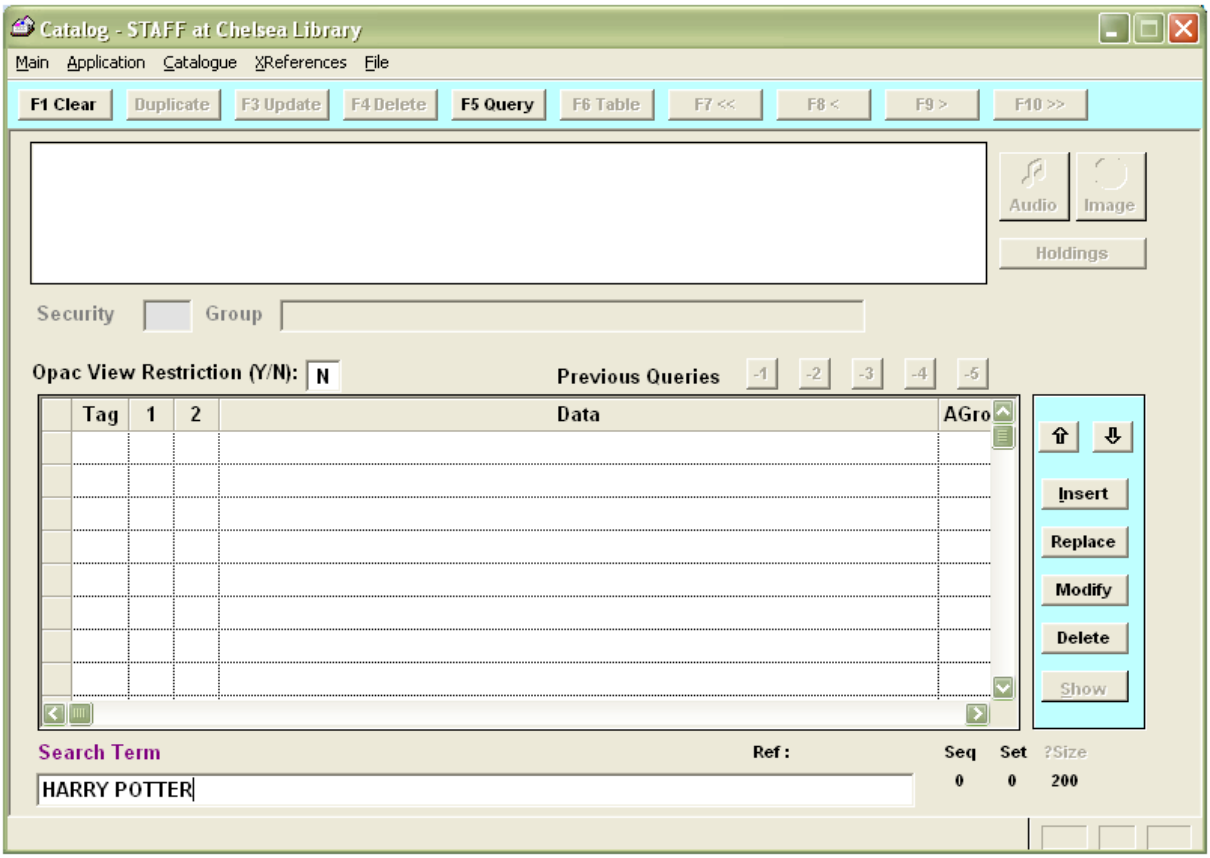
8. To view a particular Catalogue record, double-click the line (or highlight the line and select the **<Enter>** button)
9. The selected Catalogue record will then be displayed in the main Catalog screen:



10. Use the scroll bar to scroll through the listing

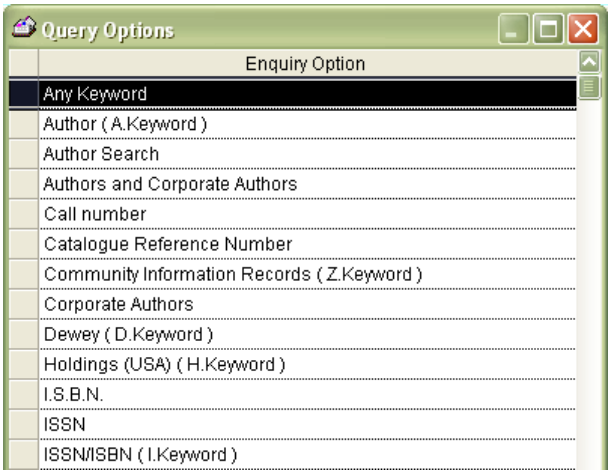
Catalogue

1. Launch the *Amlib* client
2. Go to **Main** > **Catalogue** > **Catalogue** (or the icon) – the Catalog screen will display:

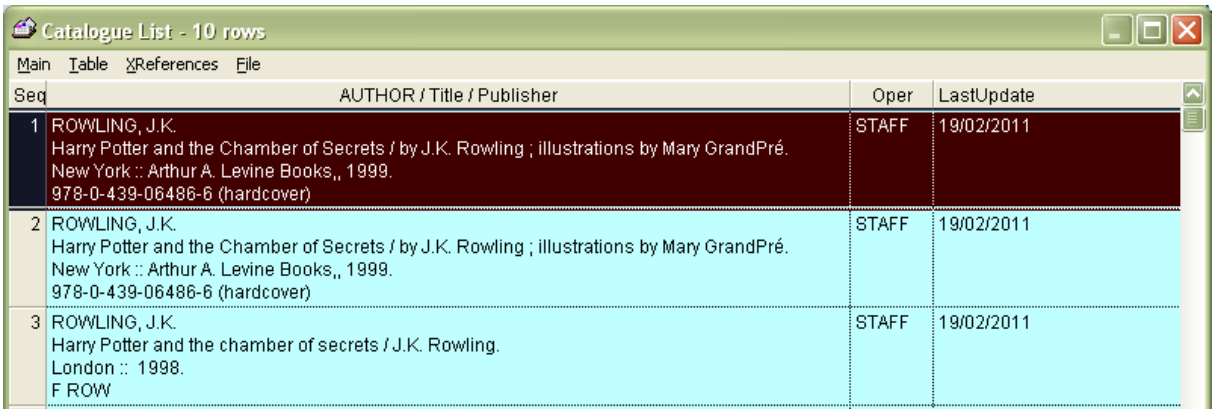


3. Type all or some of the Catalogue entry – for example: part of a Title

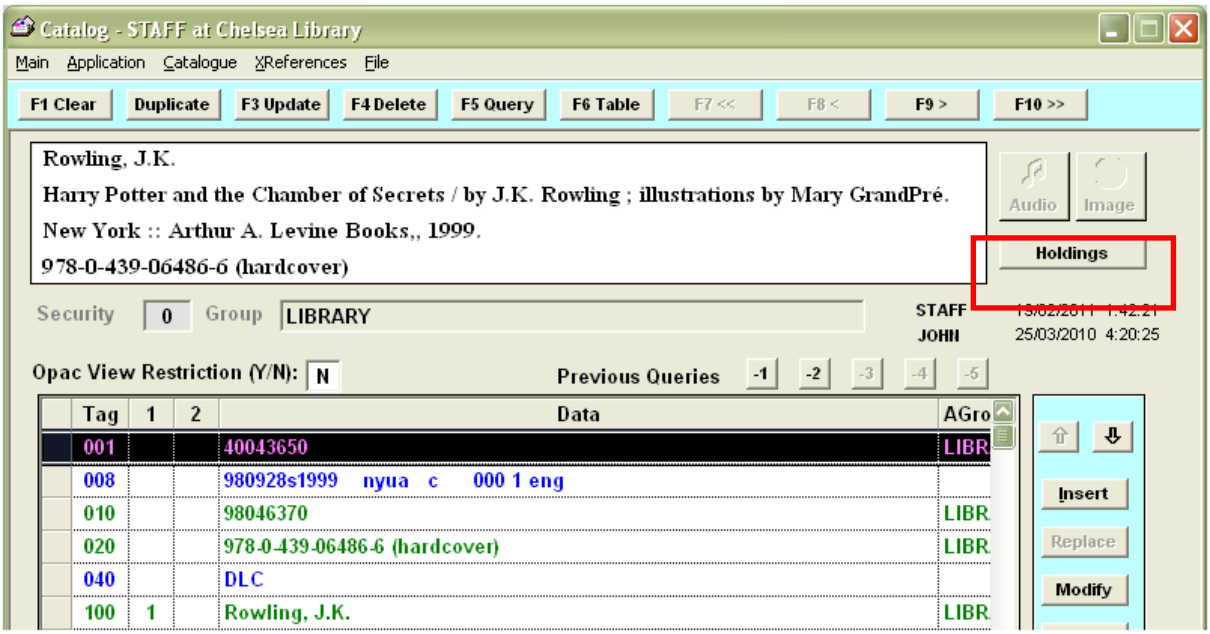
4. Click the **F5 Query** button
5. If a Query option has not previously been chosen, the Query Options listing will display:



6. Double-click on the desired Query option (or highlight the line and select the **<Enter>** button)
7. When more than one record is found, the search results are shown in a Catalogue List:



8. To view a particular Catalogue record, double-click the line (or highlight the line and select the **<Enter>** button) – the selected Catalogue record will then be displayed in the main Catalog screen:



9. Use the scroll bar to scroll through the listing

Please Note: A **Holdings** button has been included on the Catalog screen for quicker access to the Stockitem records attached to that catalogue record.

Search Options

- Catalogue records can be searched via Browse (alphabetical) or Keywords
- When not using the equal sign, anything like the term will be returned (the system automatically adds a wildcard % to the end of a search term)
- When not using the equal sign anything like the term will be returned. You may add a wildcard '**%**' anywhere in the term. The system automatically adds one to the end of the term

OPERATOR	EXPLANATION
ABCD	will return anything starting with **ABCD**
=ABC	requires exact match: will only return **ABC**
AB%D	will return anything starting with **AB** and containing a **D**
ABC\ABD	will return anything starting with **ABC** or with **ABD**. The slash means OR and may be repeated
=ABC\ABD	will return ABC plus anything starting with ABD

Keyword Searches

TERM	OPERATOR	EXPLANATION
OR	**** backward slash	**ABC \ ABD** results in **ABC** or **ABD**
AND	space	**ABC ABD** results in **ABC** and **ABD**

NOT	- minus	**ABC - ABD** = **ABC** not **ABD**

Keyword terms may be prefixed with a Library defined restrictor. For example, **t**.ABC \ **s**.ABD = title having ABC or subject having ABD (**t.** being the restrictor for Title and Series, **s.** being the restrictor for Subject).

Please Note: It is often inappropriate to use an **AND** connector with different restrictors – for example: an Authority cannot be both a Subject and a Title

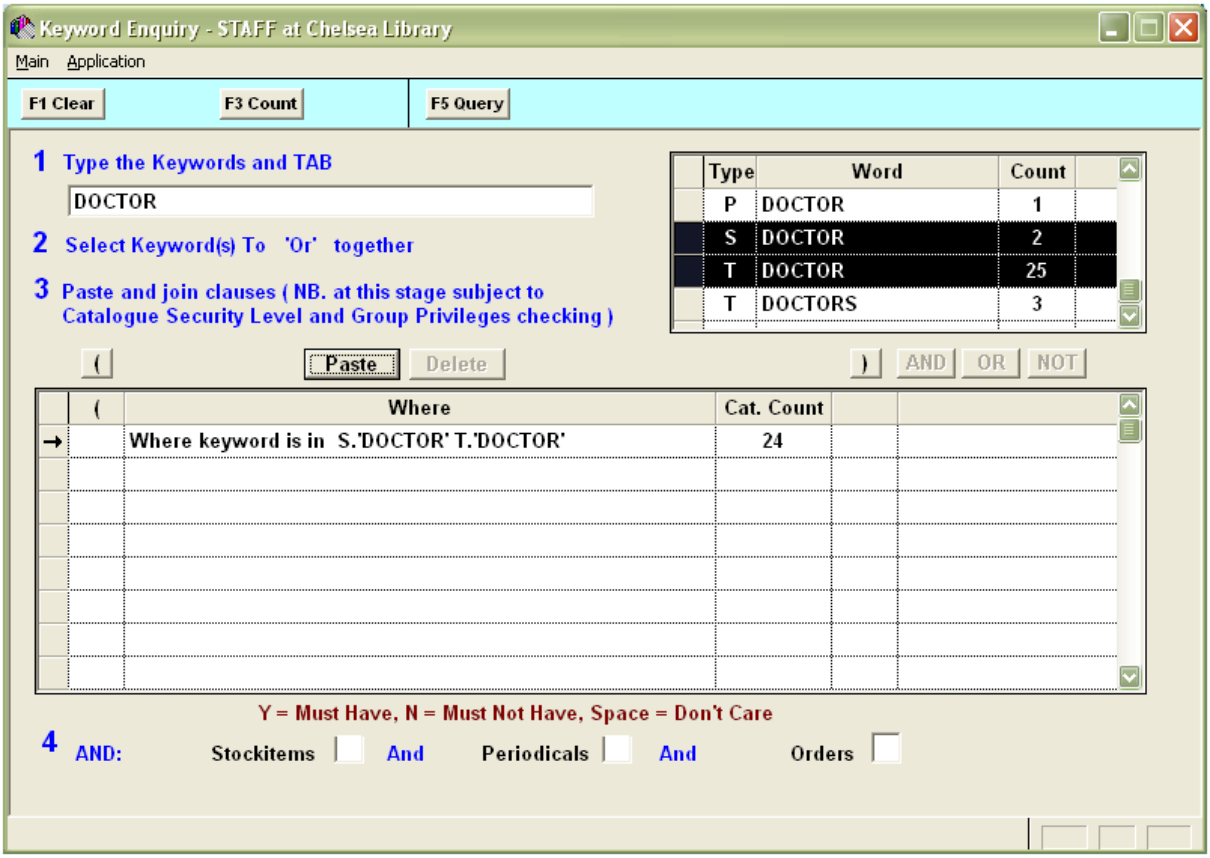
These prefixes are defined in **Main** > **Authorities** > **Authorities** – select **Application** > **KeywordDesc** and may be different according to your defaults at installation. Prefixes may be typed in UPPER or lower case.

Once you have found a set of Catalogue records, they may be saved to a file.

Cat Keyword Search

The *Catalogue* module contains an advanced Keyword search functionality.

1. Launch the *Amlib* client
2. Go to **Main** > **Catalogue** > **CatKeyword** – the Keyword Enquiry screen will display:



3. Type the search term into the Keywords field and click the **<Tab>** key
4. A series of matches will then appear in the adjacent table:

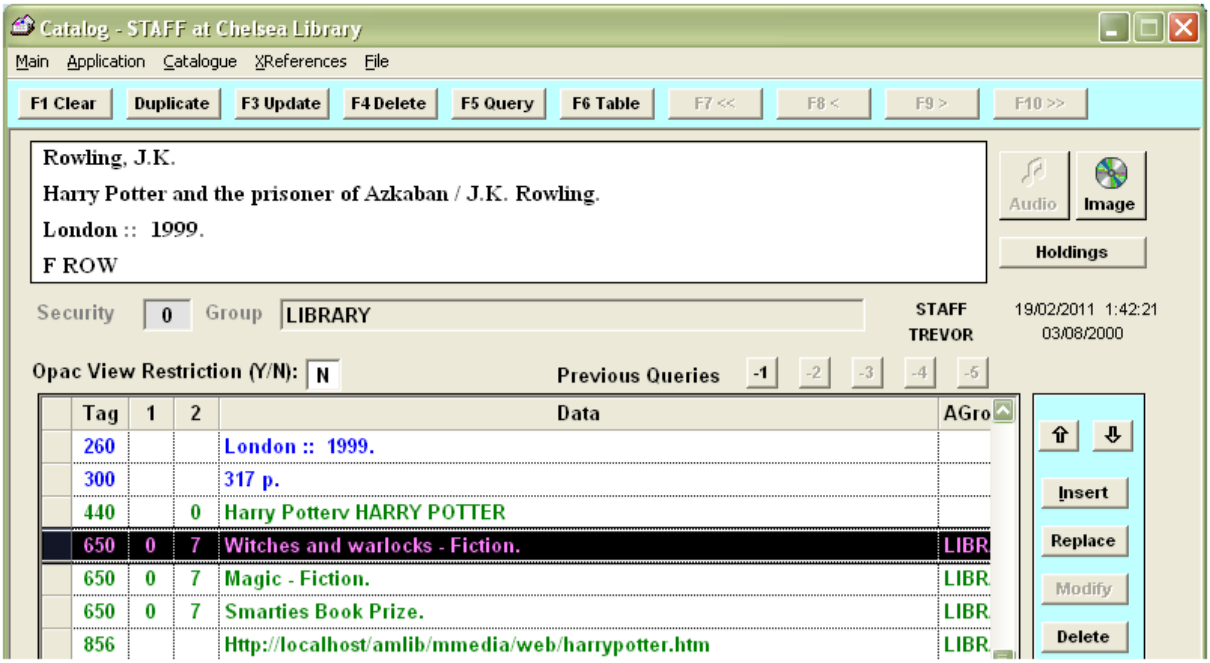
- Type: Subject (**S**), Title (**T**), Notes (**N**), etc
- Word
- Count

5. Select the terms from the Word box you would like the catalogue records for (multiple items can be selected from the Word box by holding down the **Ctrl** key and clicking with the mouse)
6. Click the **Paste** button
7. The Where term will be pasted into the table at the bottom of the screen
8. Click the **F5 Query** button to bring up the Catalogue List of results

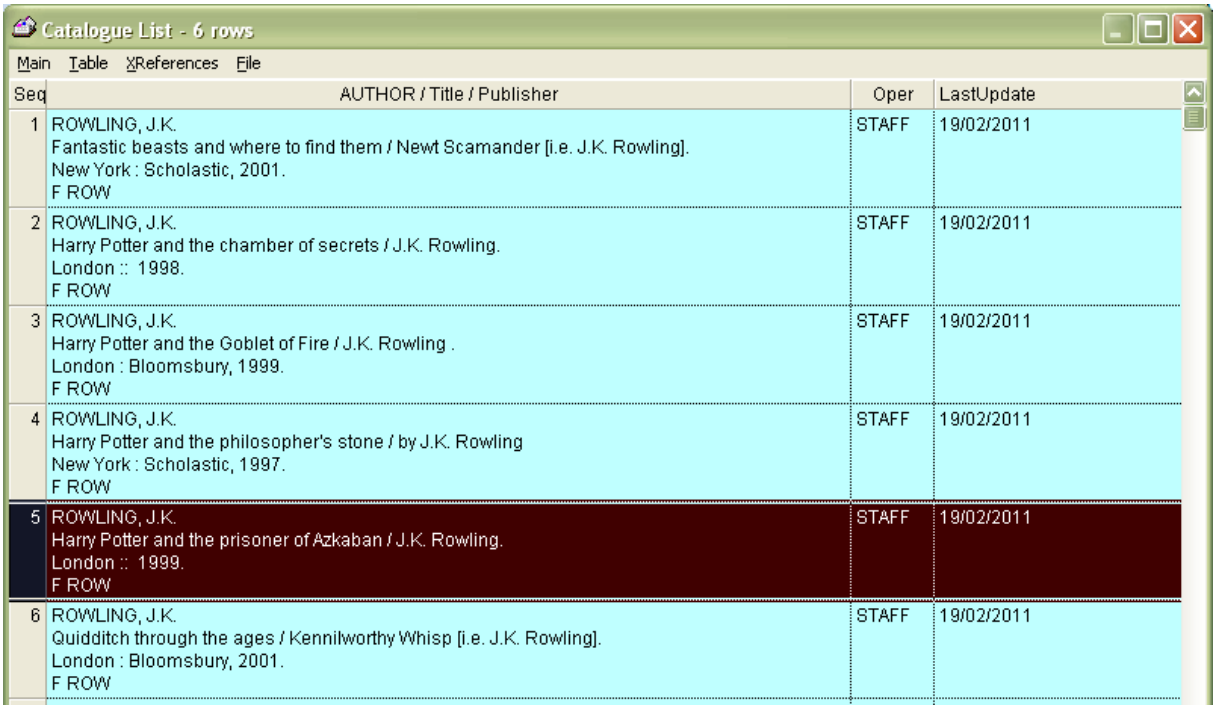
Cross Query

Once a catalogue record is displayed in the main window it is possible to use it cross-reference to other records using the same tags – for example: a particular **Subject** (**650**) tag

1. Highlight a tag – for example: **Witches and warlocks – Fiction.**



1. From the menu, select **Catalogue** > **Cross Query** – any items with matching subject headings will be displayed in a Catalogue List:



Z39.50 SEARCHING

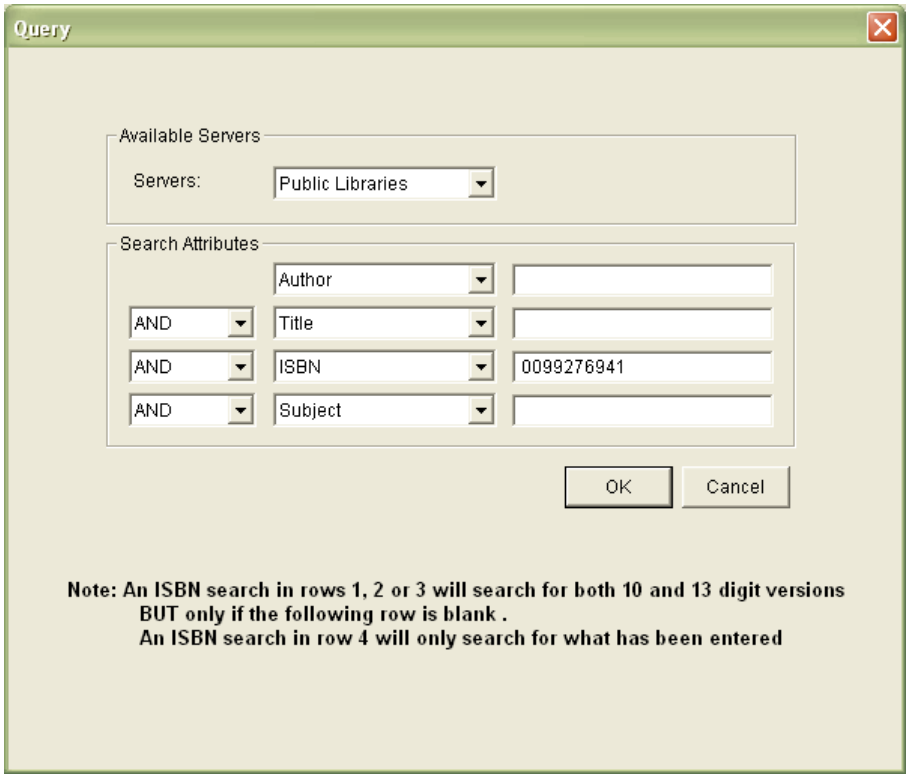
Schools can use the Z39.50 facility link to *SCIS*. You will need to contact *SCIS* directly to get your IP address authorised and they will supply the *SCIS* z39.50 details so that you can set them up as a Z39.50 Server.

1. See Appendix 4: Z39.50 Searching – Settings and Parameters for more information on how to set up New Servers and New Groups

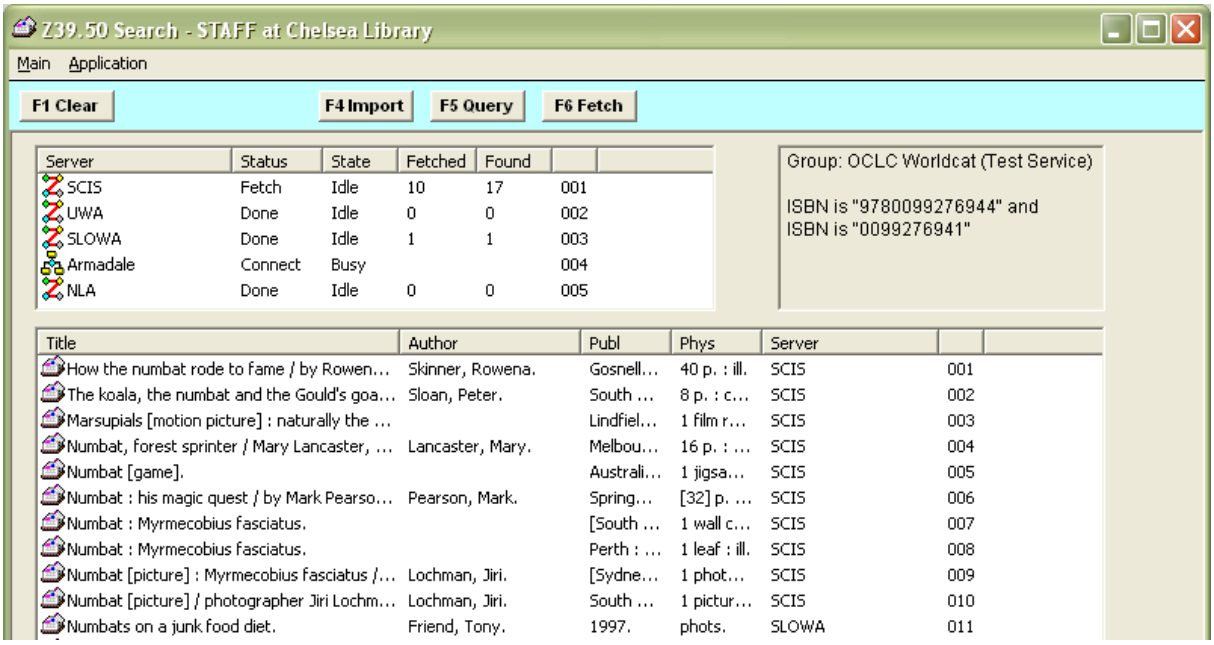
Amlib Z39.50 Client

1. Launch the *Amlib* client
2. Go to **Main** > **Catalogue** > **CatZSearch** – the Z39.50 Search screen will display:

3. Click the **F5 Query** button – Query screen will display:



4. Select the Server or Server Group from the Available Servers drop-down box – for example: **Public Libraries**
5. Type in the Search Attributes – for example: **ISBN**, **Title**, **Author**, **Subject** or combination of these
6. Click the **OK** button – the results will display in the main Z39.50 Search screen:

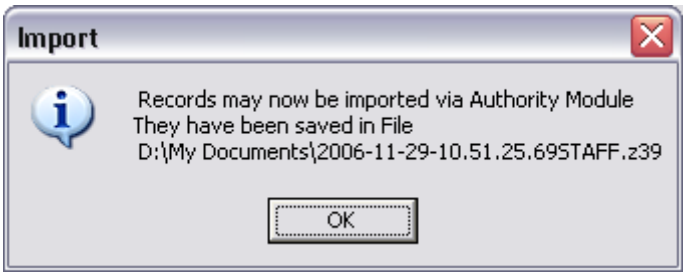


7. The columns can be sorted by clicking any of the column headings
8. Save selected records to a MARC file for import:

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

b. Click the **F4 Import** button

c. The highlighted records will saved to a MARC File shown in the dialogue box, to be imported into *Amlib* via MARC Takeup



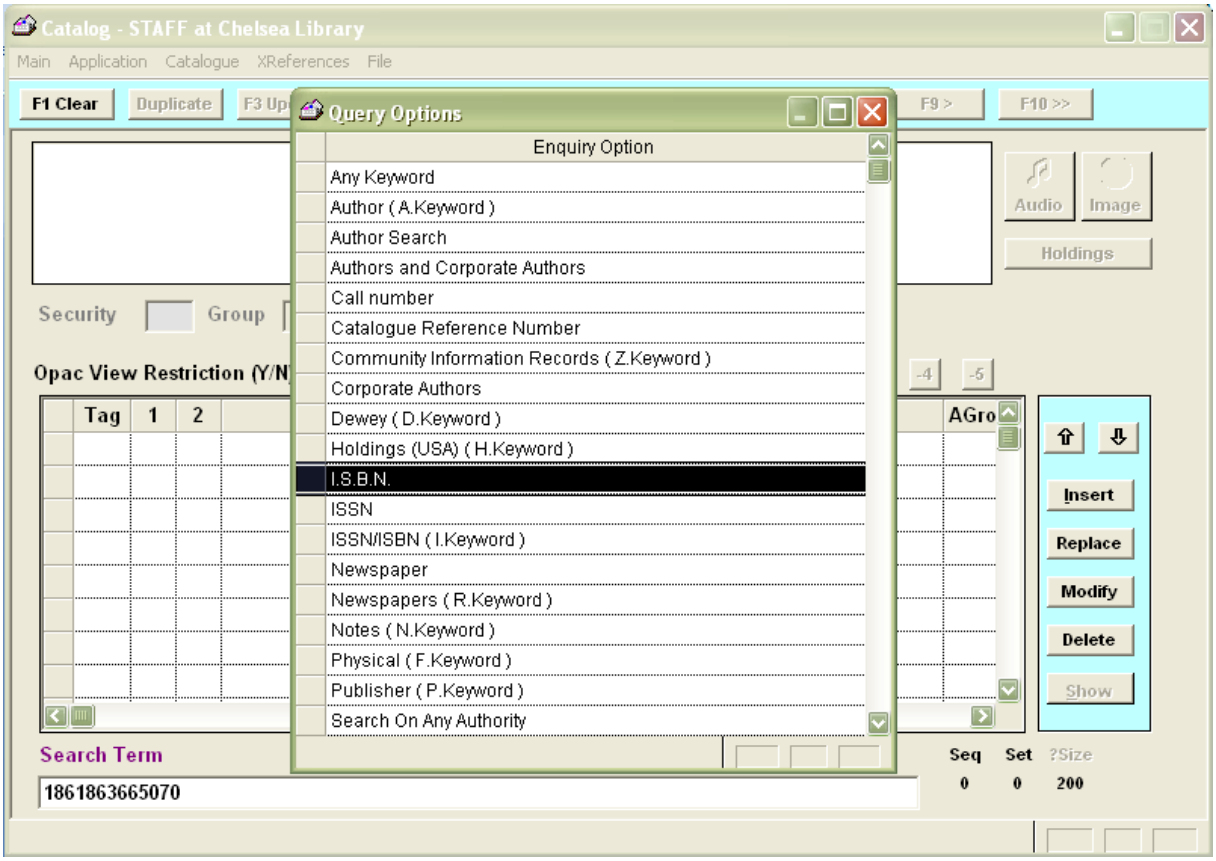
d. The MARC Takeup process will begin automatically – ensure the folder is the correct folder – for example: **My Documents**

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

SECTION 2: CATALOGUE CREATION

Check Catalogue for Existing Records

It is a good idea to search the Catalogue module to see if the item has been entered already, and just needs a Stockitem record attached. Searching for an existing record can be done in the Catalog screen (using the **ISBN**) or in the Stockitem screen (for example: using an Author or Title search). The **ISBN** can even be wanded if the Barcode reader has been ISBN enabled.



It is preferable to create a catalogue first and then create the holding record (Stockitem). If the Stockitem is processed first, not all the Tags are made when the Catalogue is created from the Item menu. For example: Subject headings are not transferred across.

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

MANUAL ADDITION OF NEW RECORDS

There are three manual entry methods available:

1. **Work Sheet Method**
    - After choosing a template related to the form of the data (for example: fiction/non-fiction etc.) the required fields can be filled in: Authority listings can be accessed

when appropriate (for example: for standard entry of Authors, Subjects, Publishers, etc)

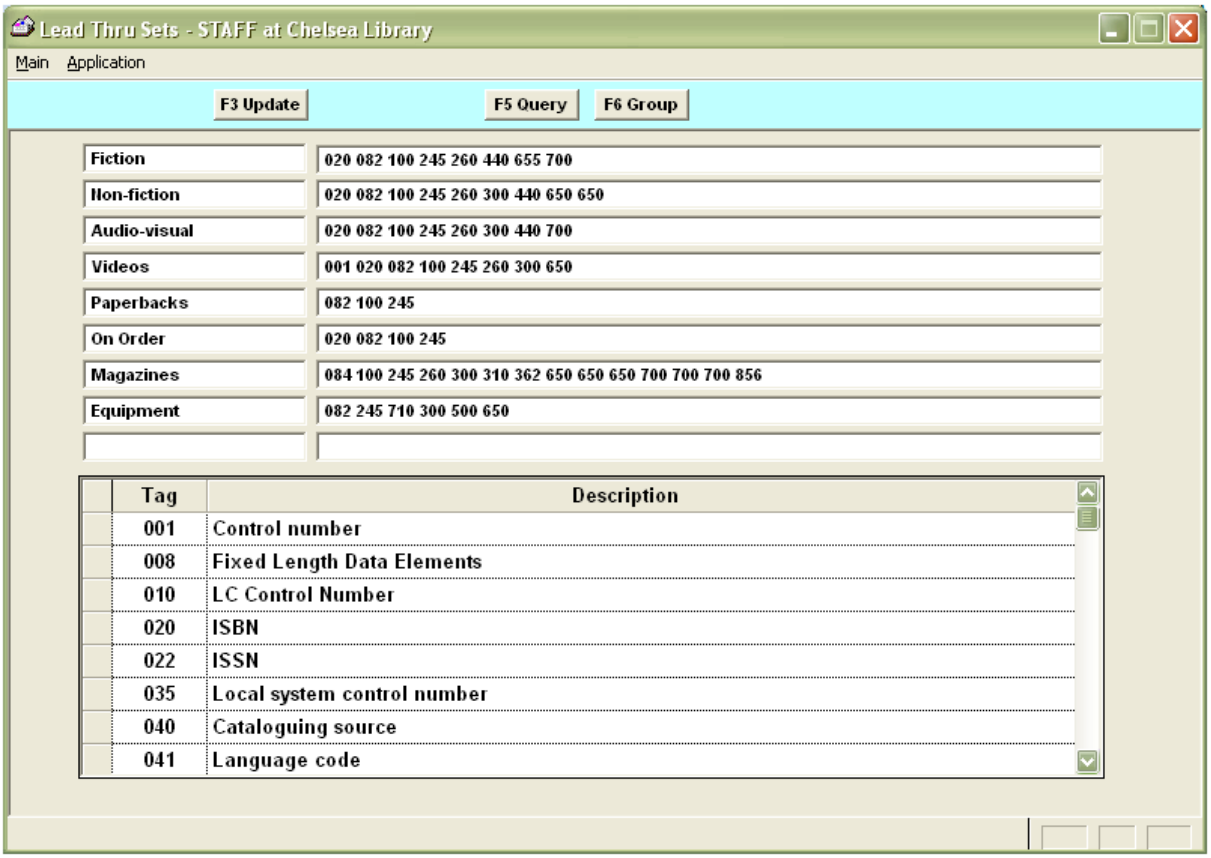
2. **Editing existing records**
    - It is possible to duplicate an existing record and alter the relevant data
3. **New record from scratch**
    - No Lead Thru method: Tags can be inserted and built up to create a full record

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

Lead Thru Sets

It is possible to set up the Lead Thru generation sets and check/modify the tags that will be presented for Data Entry when creating a Catalogue record using the Lead Thru methodology.

1. Launch the *Amlib* client
2. Go to **Main** > **Catalogue** > **CatLeadThruSets** – the Lead Thru Sets table will display:



3. To **add** a Lead Thru set:
    a. Type a Description into an empty field in the first column
    b. In the second column, type the Tag numbers in the sequence you would like them to appear – tags must be separated by a space (the tags that are available can be checked from the lower box) – for example: **020 082 100 245 260 440 650 700**

c. It is possible to use multiples of certain tags – for example: **650**

4. To **modify** the tags in an existing Lead Thru set:

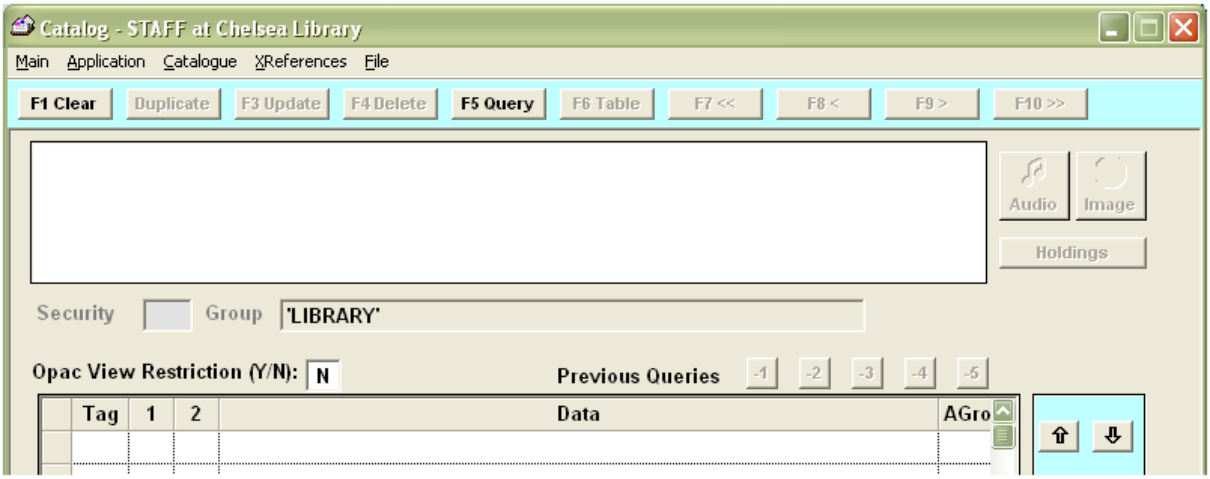
   a. Adjust the tags displayed in the second column – tags must be separated by a space (the tags that are available can be checked from the lower box) – for example: **020 082 100 245 260 440 650 700**

   b. It is possible to use multiples of certain tags – for example: **650**)

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

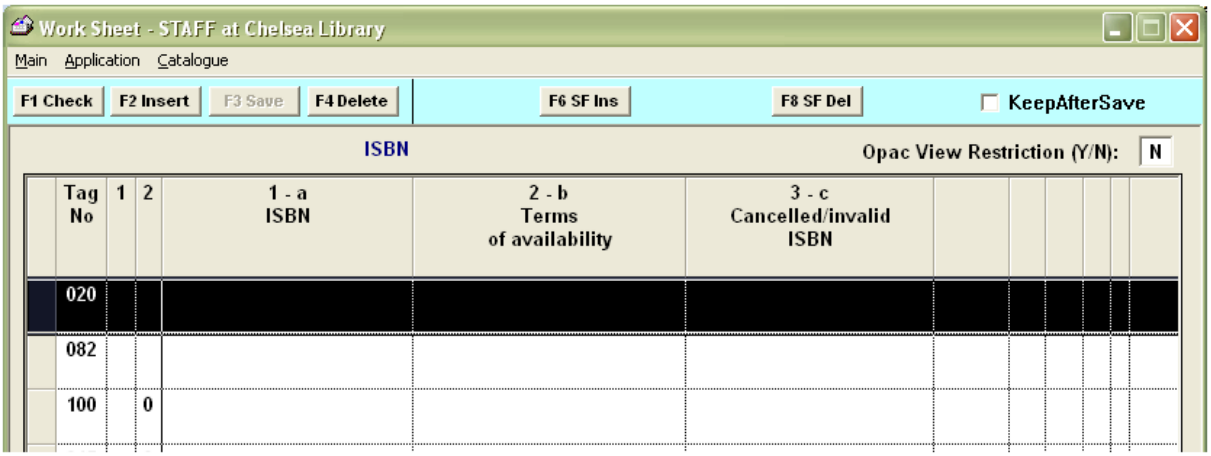
Work Sheet Method

1. Launch the *Amlib* client
2. Go to **Main** > **Catalogue** > **Catalogue** (or the icon) – the Catalog screen will display:

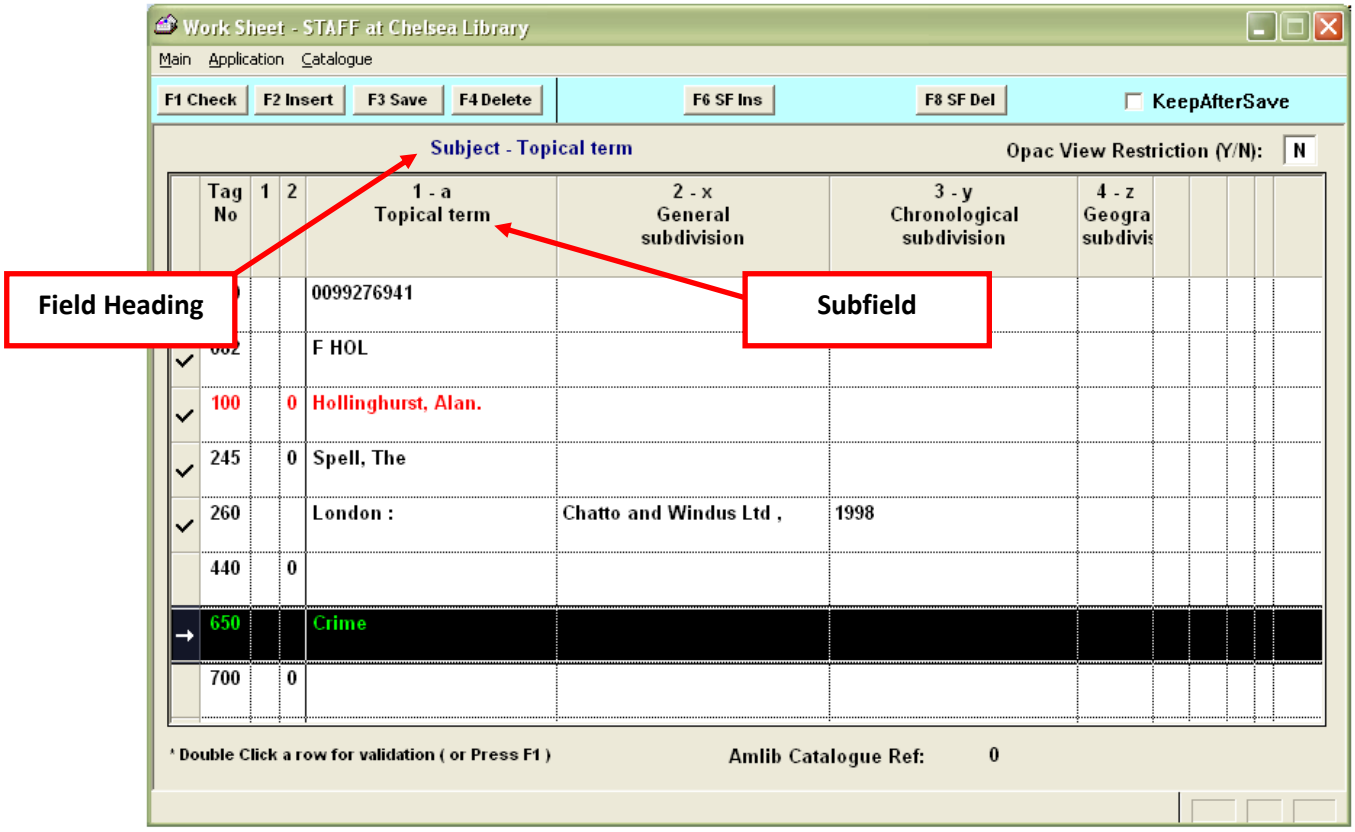


3. From the menu, select **Catalogue** > **Catalog Create** – the Select Template prompt will display:

4. Click on the button for an appropriate Lead Thru set – for example: **Fiction**
5. The Work Sheet will display with a number of preset MARC tags already populated:

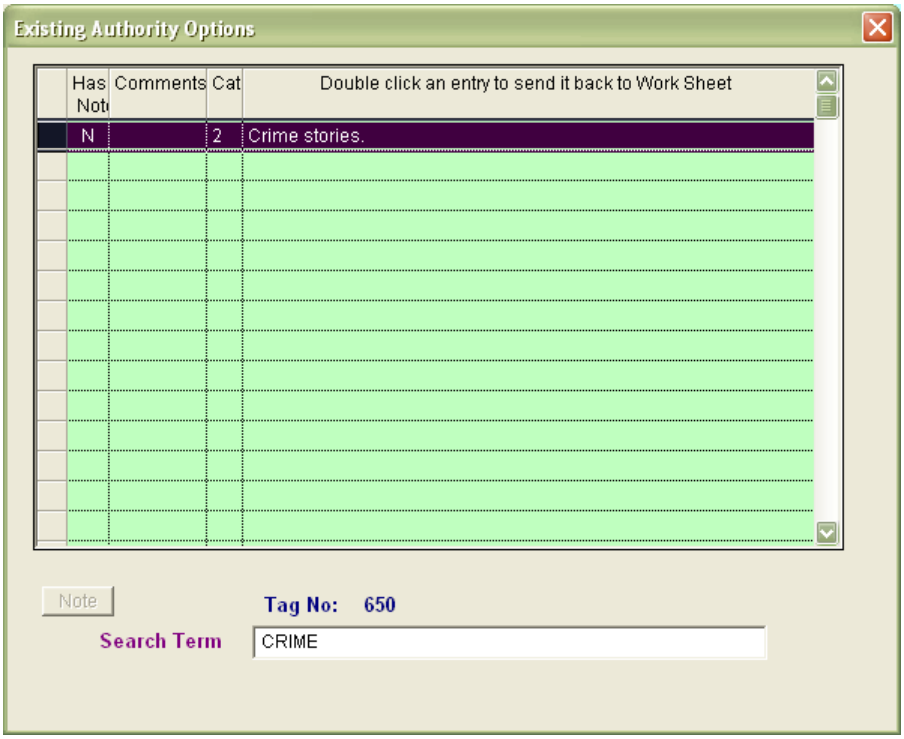


6. An item's bibliographic details can now be entered – as you move through the Work Sheet, the headings (descriptors) change, so it is possible to observe the type of data required in the subfield of the tag (see also Appendix 5: MARC Tag Subfields & Punctuation for more information)

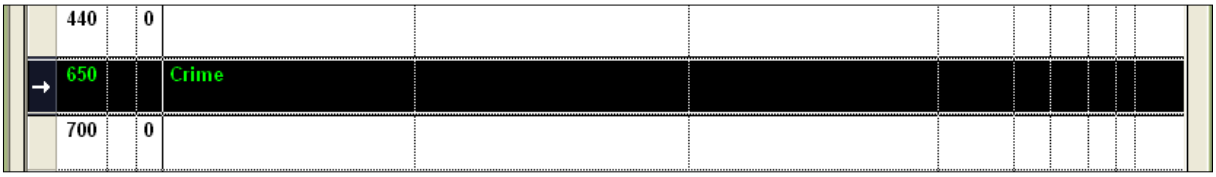


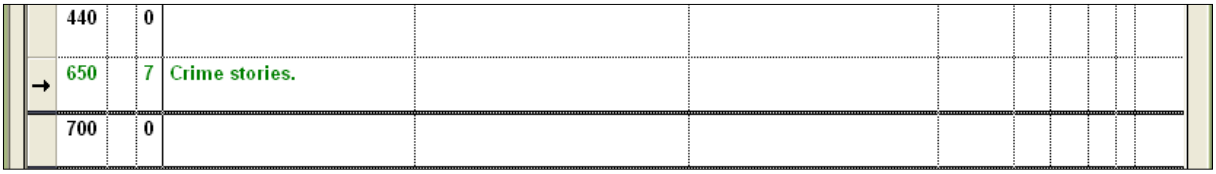
7. Where the data is Authority based (for example: *Author*, *Subject* heading, *Series*, etc.) a listing of Authorities can be viewed and selected – for example: to search for a particular Author, type the first few letters of the surname, highlight the row and click the **F1 Check** button

8. The Existing Authority Options screen will open displaying all matching Authorities and the number of Catalogue records which use each Authority:



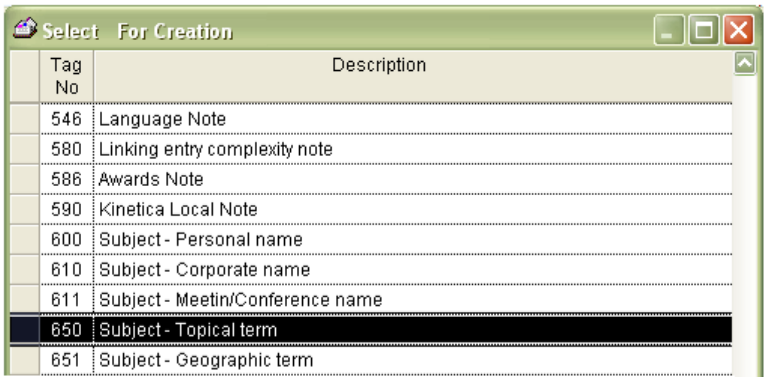
9. To select an Authority in the table, simply double-click on it: the contents of the Tag being checked will then change to match the selected Authority (the text will also change colour from black to **green**)



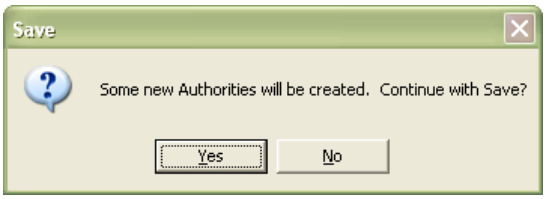


10. Once selected (or if there is no matching Authority), click on the red **[X]** to close the selection table (if there were no Authorities found the contents of the tag being checked will turn **red**, if there were Authorities found but none were selected the contents will turn **pink**)

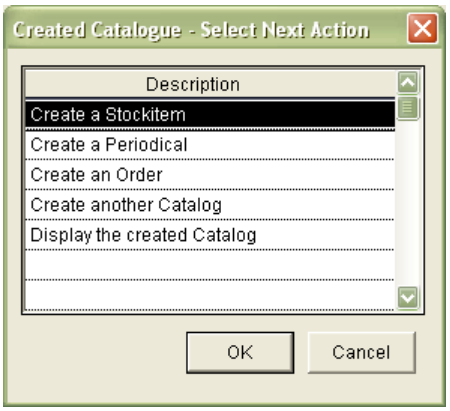
11. To enter additional tags, click the **F2 Insert** button – the Select For Creation screen will display (the preset Tags allow for up to 40 entries):



12. Find the required Tag and double-click it to select it – a new entry with the selected Tag No will appear in the Work Sheet screen
13. Click the **F3 Save** button when the record is complete
14. If new Authorities are to be created, a prompt with the following message will display: **Some new Authorities will be created. Continue with Save?** (the new Authorities will be highlighted in **red**, so you can check them)



15. Click the **Yes** button – the Created Catalogue – Select Next Action prompt will display:

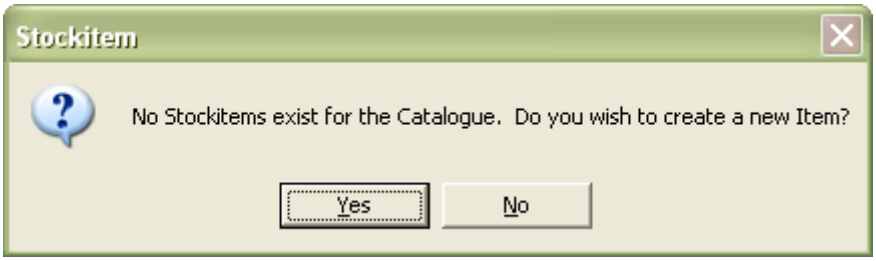


16. If you intend to create your holdings immediately, then highlight the **Create a Stockitem** and click the **OK** button (alternatively you can select the **Display the created Catalogue** if you wish to review the actual Catalogue record)

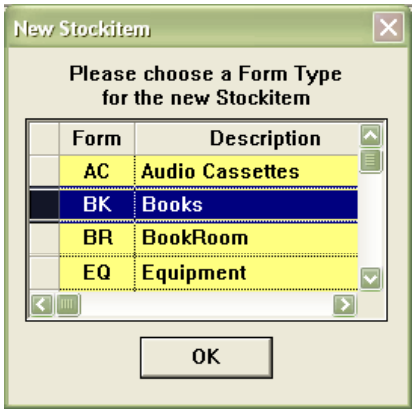
Adding Stockitems

This section continues from the section above. If you don't immediately choose to create a stockitem record, you can select **XReferences** > **StockItems** from the Catalog screen menu (or click the **Holdings** button on the Catalog screen) to initiate the process.

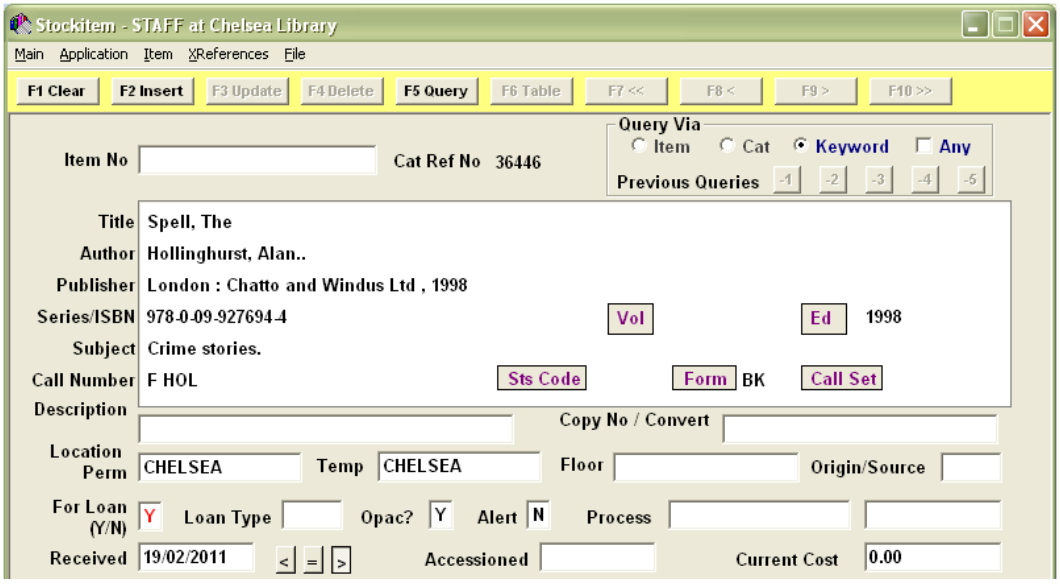
1. A prompt with the following message will display: **No Stockitems exist for the Catalogue. Do you wish to create a new Item?**



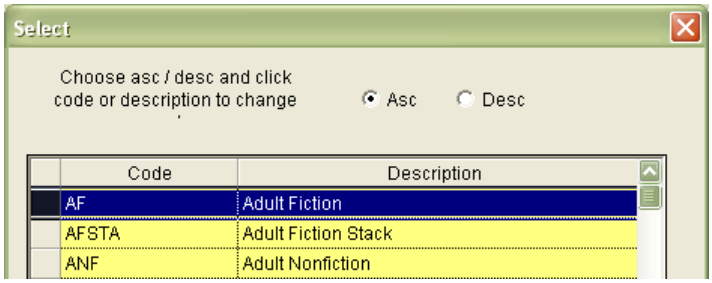
2. Click on the **Yes** button – a New Stockitem prompt will display with the following message: **Please choose a Form Type for the new Stockitem**:



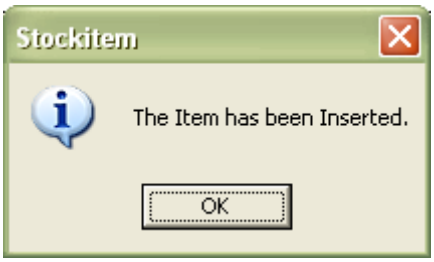
3. Choose the appropriate Form type and click on the **OK** button – the main Stockitem screen will enter creation mode (the **F2 Insert** button will appear **bolded**) and a number of fields will be automatically pre-populated:



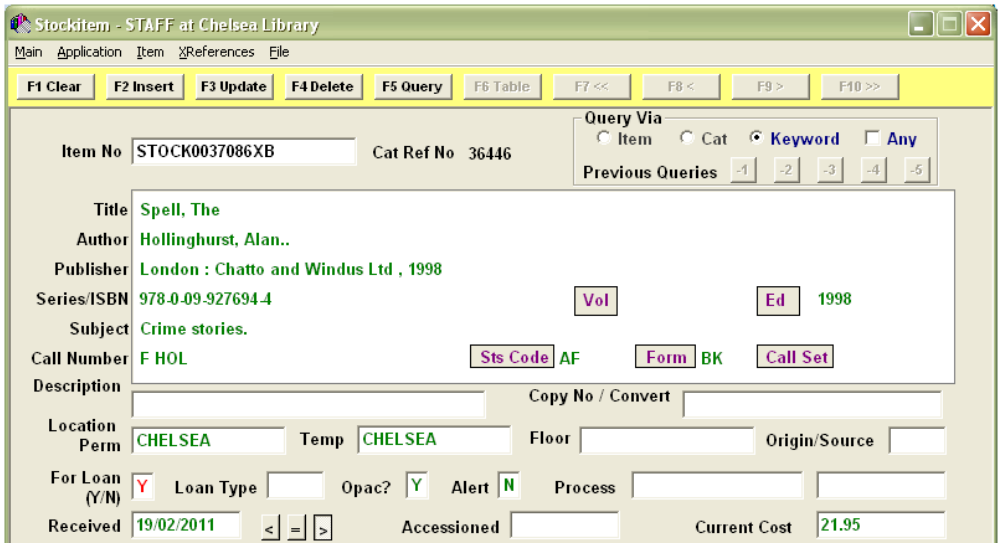
4. Complete the other fields as required – for example: St(at)s Code, Current Cost, Floor location, etc – to access a list of codes in a field enter **.<Tab>**
    - For example: in the **Stats Code** field, entering **.<Tab>** will display a list of your Stats Codes and Descriptions – double-click on a entry to select it:



5. Scan in **barcode** in the Item No field (if you wish to create a system-generated barcode, leave this field blank)
6. Click on the **F2 Insert** button when complete –a prompt with the following message will display: **The Item has been Inserted.**



7. Click the **OK** button



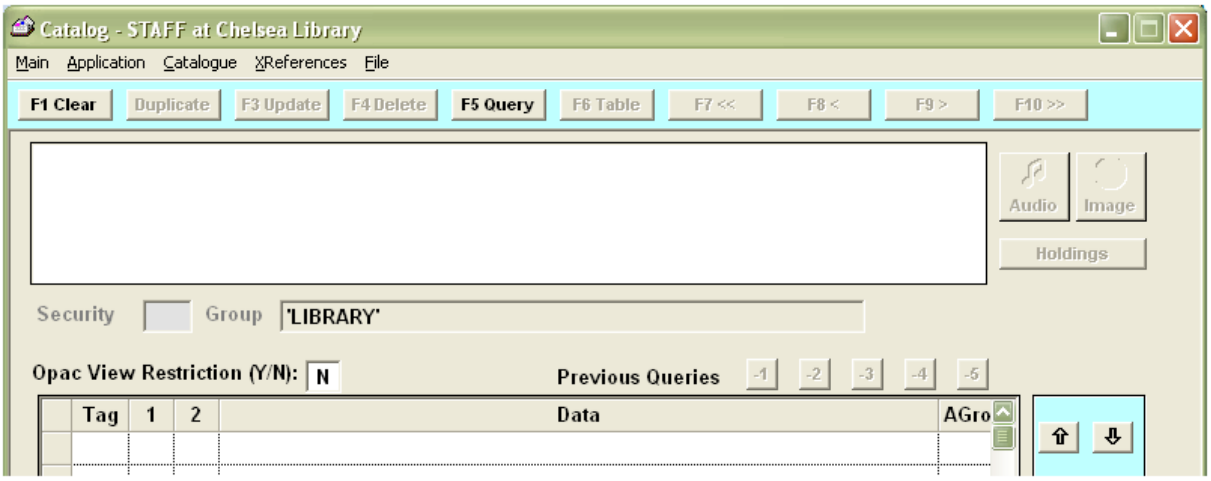
Multiple Copies

To enter multiple copies of the same catalogue item:

1. Scan in a new barcode into the Item No field – the **F2 Insert** button will once again become **bolded**
2. Change any other details as required – for example: Stats Code, Copy No and Floor location
3. Click the **F2 Insert** button when complete

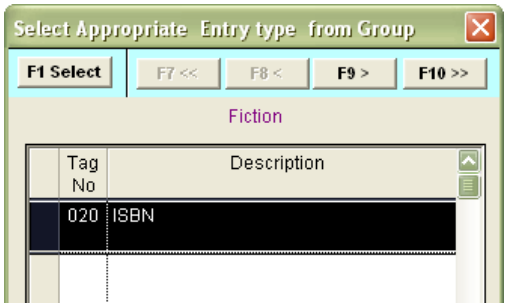
Lead Thru Generation

1. Launch the *Amlib* client
2. Go to **Main** > **Catalogue** > **Catalogue** (or the icon) – the Catalog screen will display:



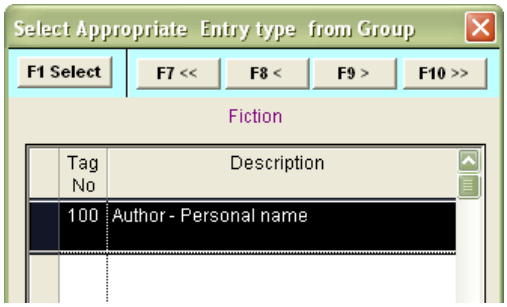
3. From the menu, select **Catalogue** > **Catalog Create** – the Select Template prompt will display:

4. **Untick** the Work Sheet Style box and click on the button for an appropriate Lead Thru set – for example: **Fiction** – the Select Appropriate Entry type from Group screen will display:

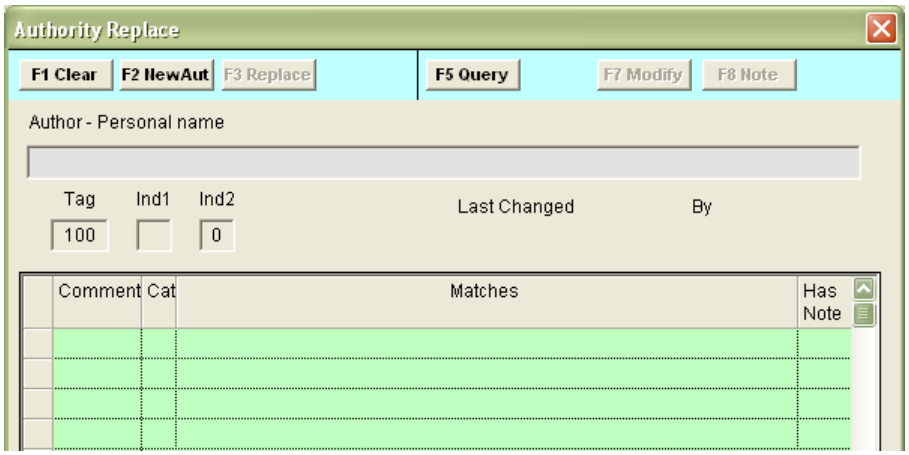


5. Once the format has been chosen, the user will be taken through preset tags to enter data (it is also possible to insert tags where appropriate)

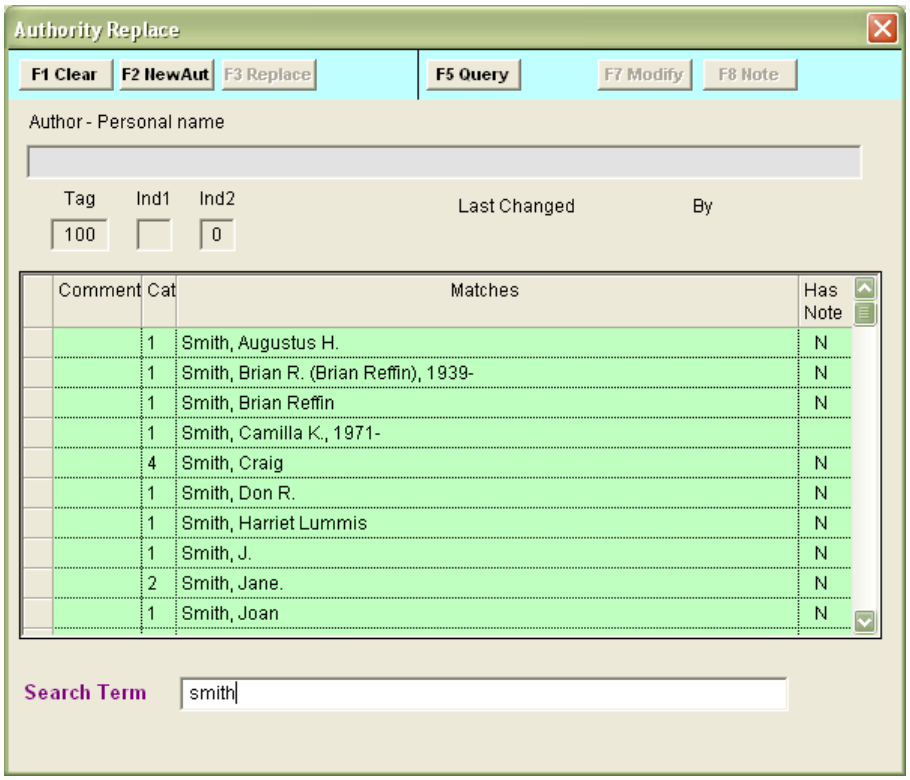
6. Double-click the chosen tag, or click the **F1 Select** button



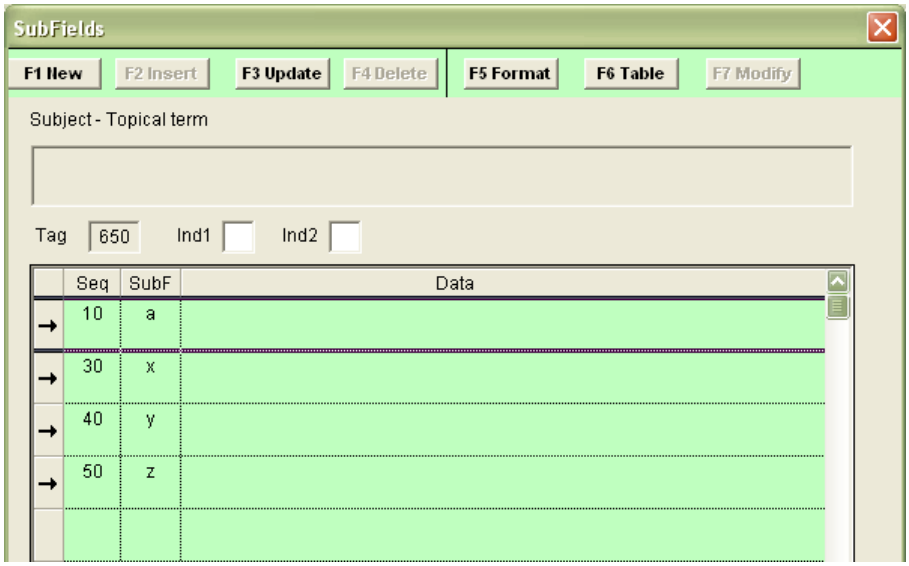
7. If the tag is Authority based, an Authority Replace screen will display:



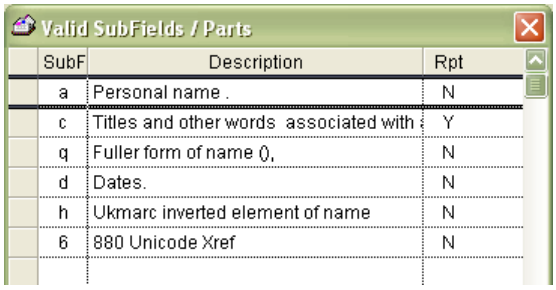
8. Type in the Search Term and click the **F5 Query** button to initiate the search:



9. If the correct term is in the list:
    a. Highlight the term and click the **F3 Replace** button
    b. The Authority Replace screen will close and the selected Authority will appear in the catalogue record
10. If the correct term is not in the list or the search gives no results:
    a. Click on the **F2 NewAut** button – the SubFields screen will display:



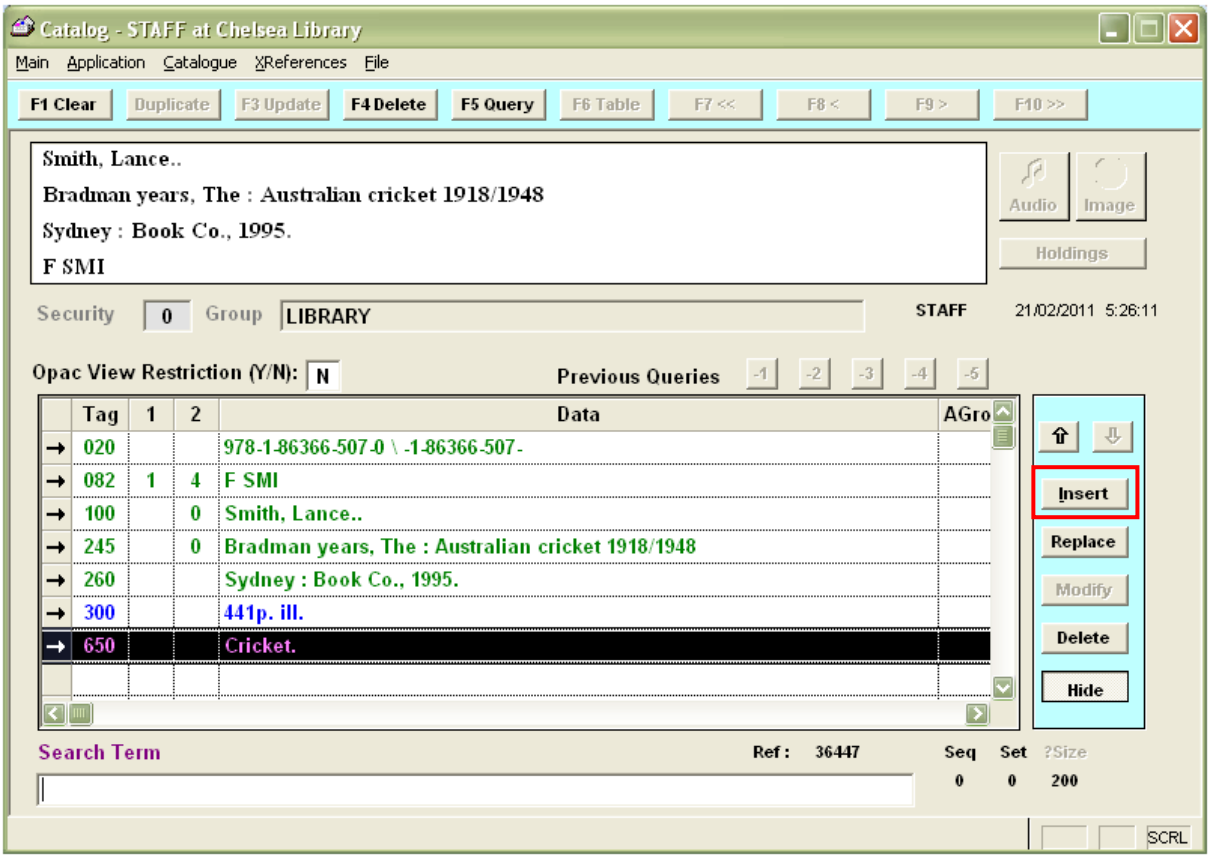
    b. Please ensure you enter the correct data into the correct subfield – clicking the **F6 Table** button gives the Valid SubFields/Parts table available for that Tag:



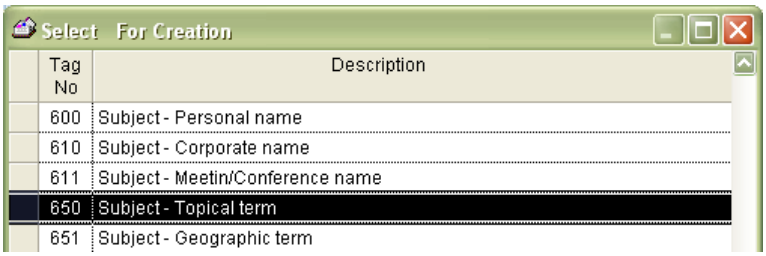
    c. Once the data has been correctly entered click the **F3 Update** button
    d. Click on the red **[X]** in top-right corner to close the SubFields screen

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

11. You will then be guided through the other preset tags, allowing you to enter data as appropriate
12. Once complete, close out of the Lead Thru set screen by clicking on the red **[X]** – you will be returned to the main Catalog screen

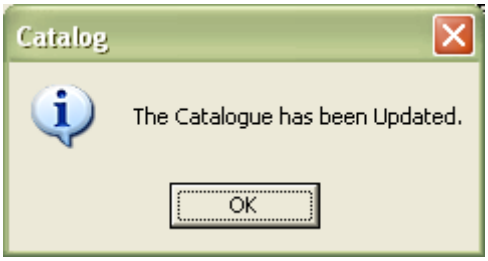


13. To enter extra Tags: click the **Insert** button on the right-hand side of the screen – the Select for Creation screen will display:



14. Select the Tag to create (for example: **650**) by double-clicking it (an Authority search can then be undertaken in the Authority Replace screen)

15. Click the **F3 Update** button when complete – a prompt with the following message will display: **The Catalogue has been Updated.**



16. Click the **OK** button

IMPORT MARC CATALOGUE DATA FROM SCIS (OR OTHER AGENCY)

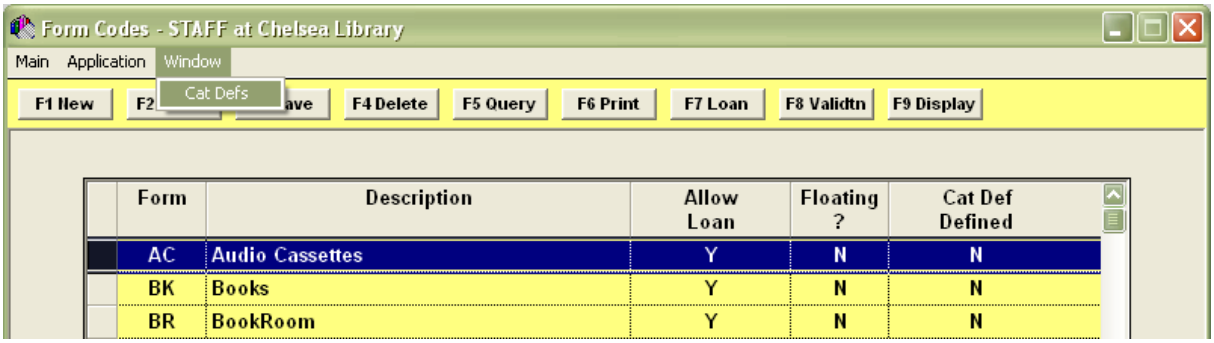
Before using Marc TakeUp….

- Check Parameters – see Section 4
- Set the Cat(alogue) Definitions for other Forms and Stats codes, the correct Stats and Form codes are given to items as they are created. The Default codes **do not** need Cat Definitions as they will automatically be inserted unless an alternative rule applies.

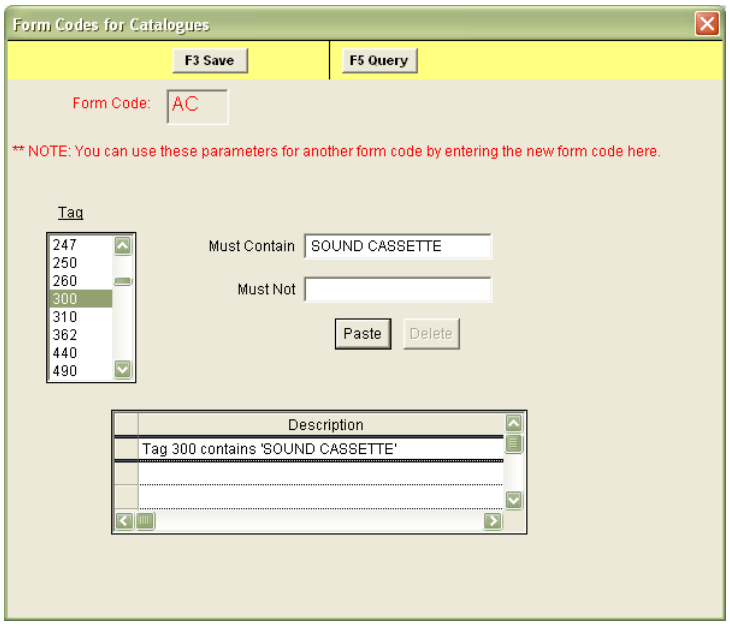
Form Codes: Cat Definitions

Form code Cat Definitions are found in the Window menu of the Stockitem Form Codes screen.

1. Launch the *Amlib* client
2. Go to **Main** > **StockItems** > **StockitemForms** – the Form Codes screen will display:



3. Highlight a Form code in the table – for example: **AC – Audio Cassettes**
4. From the menu, select **Window** > **Cat Defs** – the Form Codes for Catalogues screen will display:



5. To set a Cat definition:

a. Select a Tag number – for example: **300**

b. Enter the data that MUST be present for valid items to be given this Form Code in the Must Contain field– for example: **Sound Cassette**

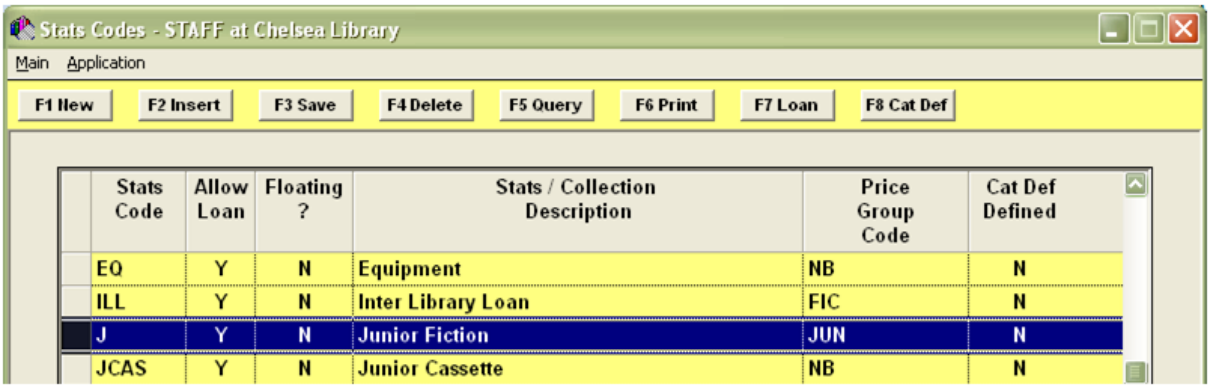
c. Enter the data that MUST NOT be present for valid items to be given this Form Code in the Must Not field – for example: **CD**

d. Click the **Paste** button

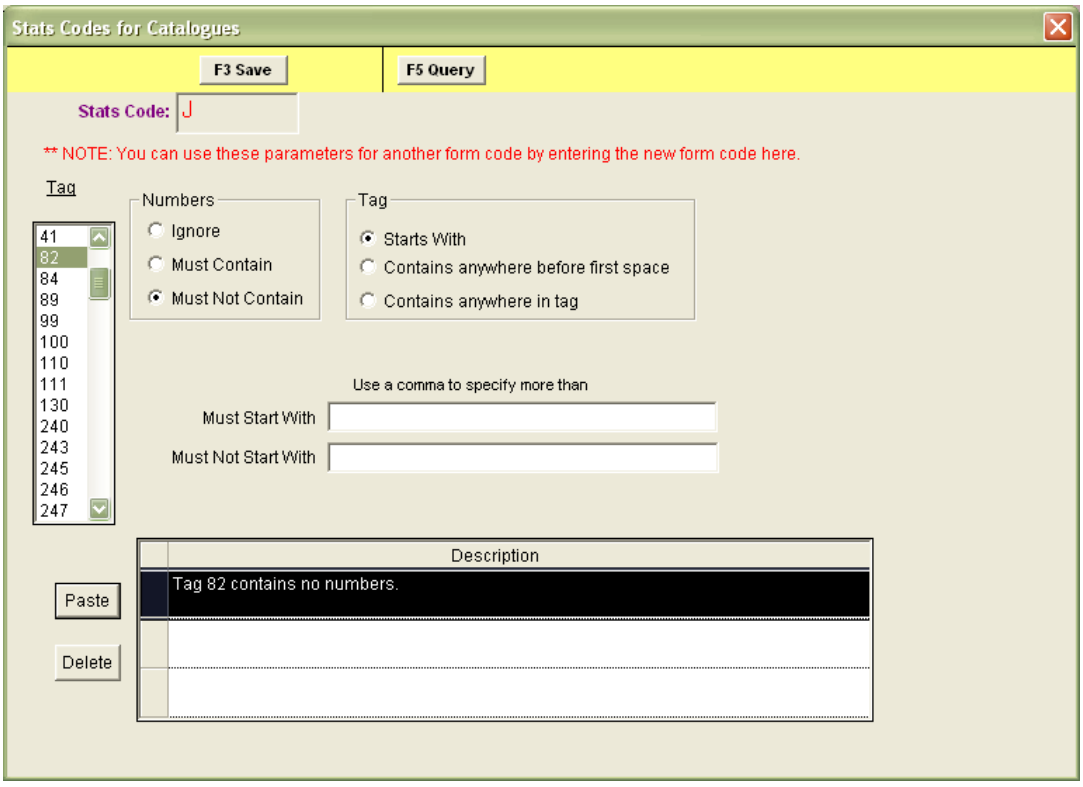
6. Click the **F3 Save** button when complete

Stats Codes: Cat Definitions

1. Launch the *Amlib* client
2. Go to **Main** > **StockItems** > **StockitemStatsCodes** – the Stats Codes screen will display:



3. Highlight a Stats Code in the table – for example: **J – Junior Fiction**
4. Click the **F8 Cat Def** button – the Stats Codes for Catalogues screen will display:



5. To set a Cat definition:
    a. Select a Tag number – for example: **82**
    b. Numbers:
        i. Select either the **Must Contain** or **Must Not Contain** radio button (the **Ignore** button is only used when creating non-numerical definitions)
        ii. Enter Must Start With and/or Must Not Start With data (optional)
        iii. Click the **Paste** button
    c. Tag:
        i. Ensure Numbers is set to **Ignore**
        ii. Select either the **Starts With**, **Contains anywhere before first space** or **Contains anywhere in tag** radio button
        iii. Enter Must Start With and/or Must Not Start With data
        iv. Click the **Paste** button
6. Click the **F3 Save** button when complete

A setup for Schools might be:

CODE	EXAMPLE
NF	DEFAULT as set up in **Main** > **Supervisor** > **Installation** – Stockitem tab or set in MARC Take up
F	**Tag 82 must not contain numbers**

A setup for Public Libraries might be:

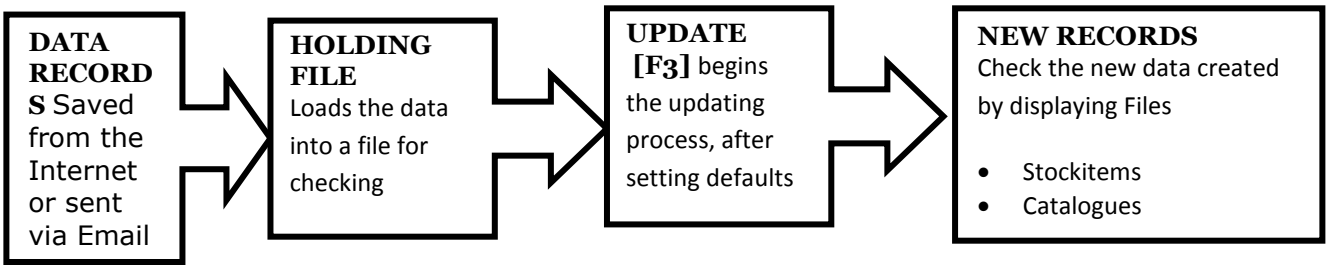
CODE	EXAMPLE
ANF	DEFAULT as set up in **Main** > **Supervisor** > **Installation** – Stockitem tab or set in MARC Take up
AF	**Tag 99 must not contain numbers.** Must contain F but not contain J before the first space.
JK	**Tag 99** Must contain JK before the first space
JNF	**Tag 99 must contain numbers** Must contain J but not contain JK before the first space.
JF	**Tag 99 must not contain numbers** Must contain J but not contain JK before the first space.

Most sites use *SCIS* (Schools) or Exchanges from *SL of WA* or *Libraries Australia* (Public Libraries) for their catalogue data.

Import MARC Catalogue Data

(From *SCIS*, *SL of WA*, *Libraries Australia*, etc.)

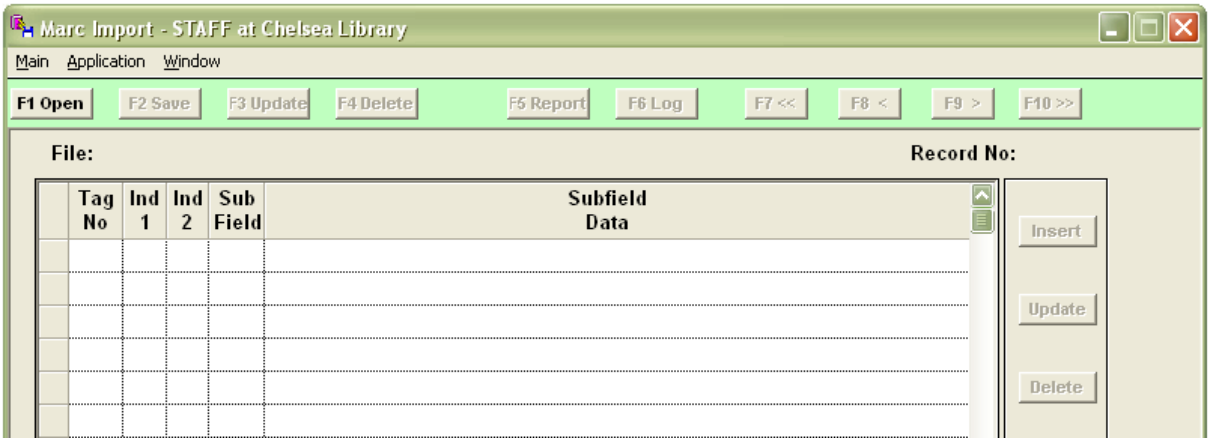
There are generally four main stages in the download process:



Please Note: The MARC Load process only uses the Tags and Subfields defined within the system. Other data loaded from external bodies may have a number of tags that you may or may not wish to capture. You may want to review your tag parameters prior to updating from an external source**.**

Accessing the Data for the Download

1. Launch the *Amlib* client
2. Go to **Main** > **Authorities** > **MarcTakeUp** (alternatively use **Ctrl + M**) – the Marc Import screen will display:

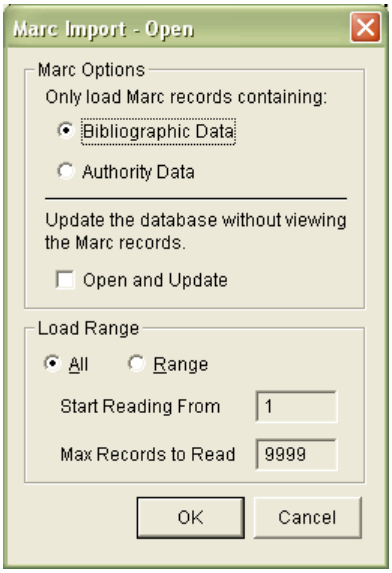


3. Select the **F1 Open** button to display the Open dialogue box
4. Locate the file to be processed by using the Look in: drop-down box – for example: if the file is on the C: drive, the Look in: box may say **Local Disk (C:)**
5. Once the file name has been located, use your mouse to select it and click on the **Open** button

There are two processing options: Bibliographic Data or Authority Data

Bibliographic Data

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



Please Note: If the Import file (*Bibliographic* or *Authority*) contains more than 9999 records, it is recommended that Open and Update is selected (ticked) so that all records can be loaded into the database. This eliminates the need to load in sections. The maximum records that can be viewed in the Holding file is 9999 records.

HEADING	FIELD	EXPLANATION/OPTIONS	EXAMPLE
Marc Options	**Bibliographic Data**	Bibliographic data to be created for the Catalogue.	Data from external source (for example: *SCIS*, *SL of WA*, *Kinetica*, etc. with USMARC Tags)
	Authority Data	Authority data for creation or updating of Authority Headings and/or cross references.	**See** and **See Also** Update from *SCIS* or other source
Update the database without viewing the Marc records	**Open and Update**	If checked (**ticked**), the imported items will not display in the Holding file.	The *Catalogue* will be **Update**d immediately
		If unchecked (**unticked**), the imported items will display in the Holding file.	Review records The *Catalogue* record will not be updated until the **F3 Update** button is selected
Load Range	**All**	All records from the file are downloaded into a holding file.	**All**
	Range	Selected records from the file are downloaded into a holding file. If Range is selected, the next 2 fields have to be updated.	For example: **1** to **50**

6. Complete the options using the above table:

    a. Marc Options = **Bibliographic Data**

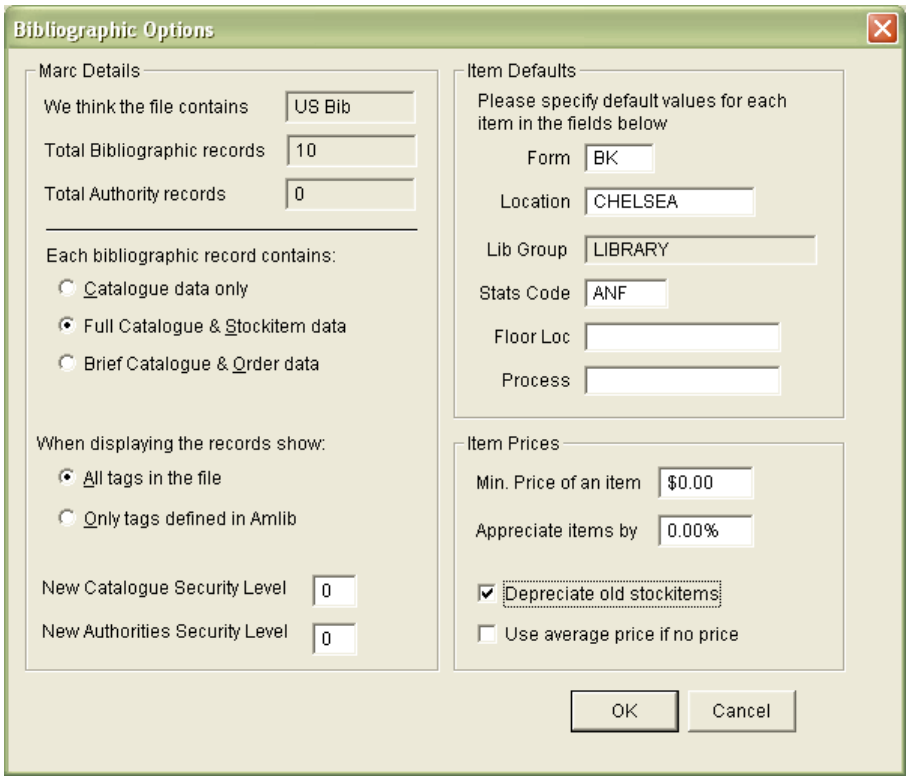
b. Open and Update = **ticked**, unless you want to review each individual MARC record

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

7. Click on the **OK** button

Bibliographic Options

1. The Bibliographic Options will then display:



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

2. Select the appropriate Each bibliographic record contains setting:

Each Bibliographic record contains:	**Catalogue data only**	The system will determine the contents of the import file. If only Catalogue data exists in the file, this will be the Default option.	**SCIS Data**

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

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

HEADING	FIELD	EXPLANATION/OPTIONS	EXAMPLE
Item Defaults **Please specify default values for each item in the fields below**	**Form**	The default values set in the **Main** > **Supervisor** > **Installation** > **Stockitem** tab will display if defined. If these fields are not yet defined, codes which will apply to the items can be entered. Rules for automatic entries of Form and Stats codes depending on the Tags that are imported, and be set in Cat Defs in the Stockitem Form and Stats codes.	If during the Import, Cat definitions cannot be created, each Stockitem will have a default Form of **BK** (for example)
	Location		**CHELSEA**
	Lib Group		**LIBRARY**
	Stats Code		**ANF**
	Floor Loc (optional)		**DISPLAY**
	Process (optional)		**IN PROCESS**
Item Prices	**Minimum price of an item**	If the item price in the Import file is less than the price set here, enter the Minimum price	The Import price is **$8.00** but the Minimum price set here is **$10.00**, the price in the Stockitem will be **$10.00**

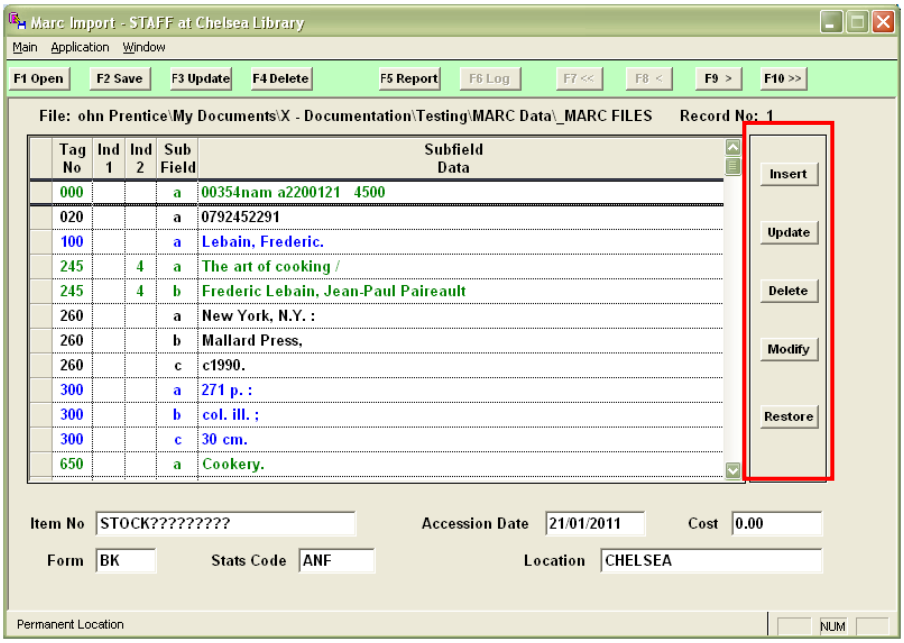
	Appreciate items by %	Items can be appreciated by a percentage – for example: GST of 10%	**10%**
	Depreciate old stockitems	Items to be depreciated will be dependent on the table set in **Stockitem** > **Application** > **Stats Group**	
	Use average prices if no price	Items will be given an average price, set in **Stockitem** > **Application** > **Stats Group**. If no price is entered in the Import File	

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

Reviewing Records to be Imported (Optional)

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

1. If the importer has decided to review the records being imported (see Bibliographic Data step above), the Marc Import screen will display:



2. If you do wish to edit the data (prior to import), use the editing buttons on the right to change or delete the individual tags

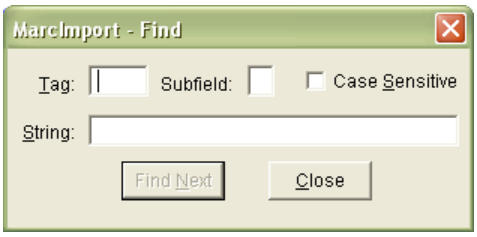
   Please Note: Editing of the data prior to import is not essential. Changes can be made after the data has been imported into the Catalogue. Remember that not all the tags will necessarily be Imported, so if editing is considered necessary, change only the tags you know will be imported!

3. Use the **F7**, **F8**, **F9** and **F10** buttons to move between records
4. Once the data has been reviewed, click the **F3 Update** button

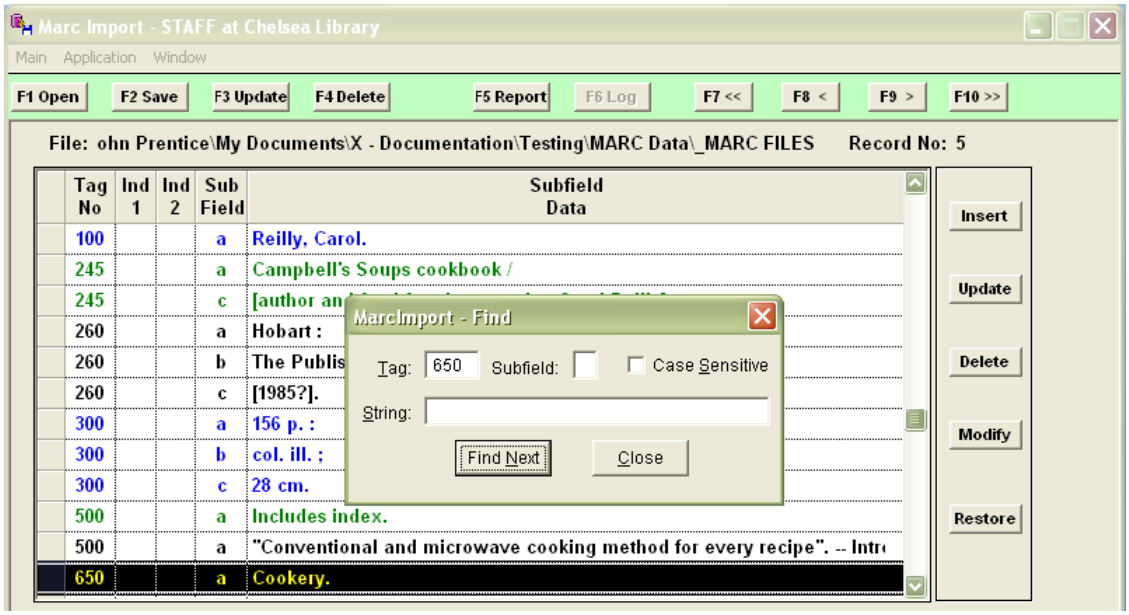
Find

It is possible to use the find function to locate any matching text, tag number or specific Subfield in the Holding File data being displayed. For example: use this facility to check all Author entries or Subject headings.

1. From the main menu, select **Window** > **Find** – the MarcImport – Find screen will display:



2. Type in the Tag, Subfield or String to find and select the **Find Next** button
3. It will then find any matching data in the record currently being displayed:

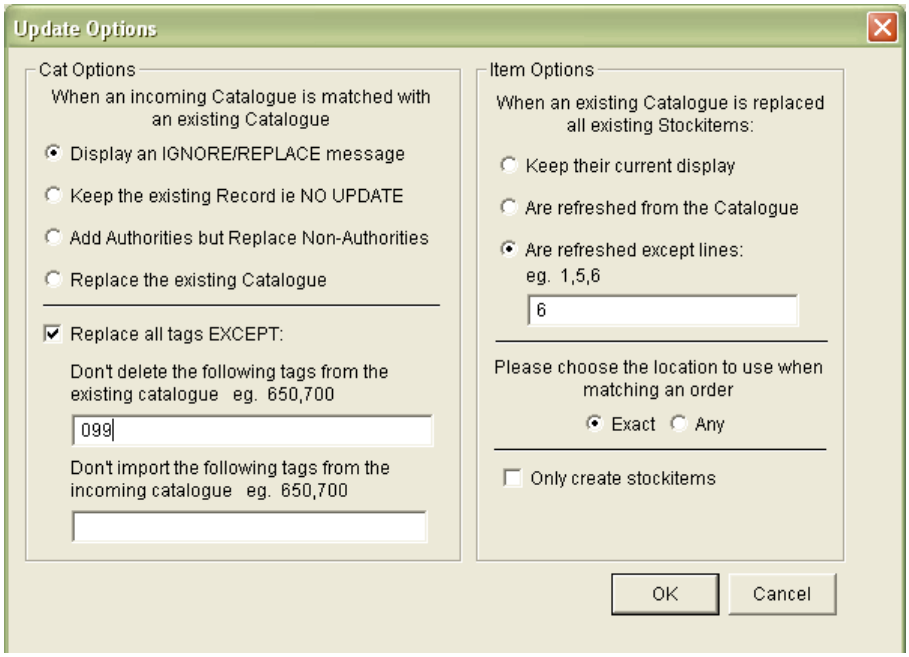


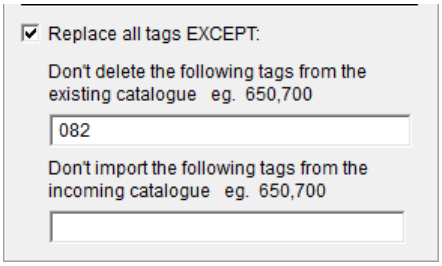
4. When the data has been checked, click the **F3 Update** button to include these items in the database

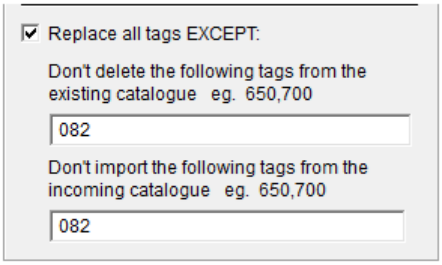
Catalogue Update Options

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

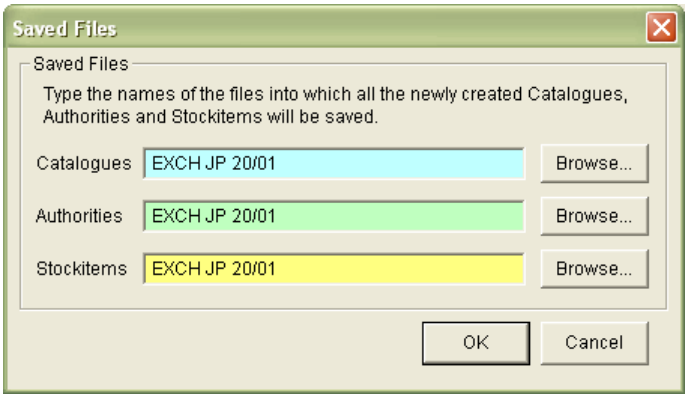
   - Cat Options: When an incoming Catalogue is match with an existing Catalogue
   - Item Options: When an existing Catalogue is replaced all existing items



HEADING	FIELD		EXPLANATION
Cat Options **When an incoming Catalogue is matched with an existing Catalogue:**	**Display an IGNORE/REPLACE message**		A message will display at each match occurs. At each match, the operator will get a choice to create a new catalog, replace the existing or to keep the existing details.
	Keep the existing Record ie NO UPDATE		No Update occurs for the Catalogue
	Add Authorities but Replace Non-Authorities		Does not replace existing Authorities but adds new Authorities to the record. However, it replaces any Non Authority data from the Import
	Replace the existing Catalogue ENTIRELY		All tags from the Import are used, overwriting any existing data
	FIELD	**OPTION**	**EXPLANATION**
	Replace all tags EXCEPT:	**Don't delete the following tags from the existing catalogue eg. 650,700**	This will vary according to the setting in **Main** > **Supervisor** > **Installation** > **Catalogue** tab: • MARCImport Replace: don't delete these tags from the existing cat • MARCImport Replace: don't import these tags from the existing cat Adds non-identical tags when importing all but specified Tags. Existing data in the specified Tags remains unchanged 

		Don't import the following tags from the incoming catalogue eg. 650,700	Adds non-identical tags when importing. Does NOT import the new data in the specified Tags. Existing data in the specified Tags remains unchanged 
HEADING	**FIELD**		**EXPLANATION**
Item Options **When an existing Catalogue is replaced, all existing Stockitems:**	**Keep their current display**		No existing Stockitems are refreshed – they remain the same
	Are refreshed from the Catalogue		All existing Stockitems are replaced by the new Catalogue details
	Are refreshed except lines: eg. 1,5,6		Enter the line numbers to be retained – for example: **6** (Line 6, which is usually Call Number). Line numbers correspond to the 6 lines of Stockitem display (for example: Line 1 is usually Title, Line 2 Author etc.)
	FIELD	**OPTION**	**EXPLANATION**
	Please choose the location to use when matching an order	**Exact**	Only order items where location is the same as the current Amlib location will be candidates for replacement
		Any	Stockitems on the file may replace any order item on the database
	Only create stockitems	**Checked**	The import of data will result in **no** Catalogue records being created. Only Stockitems will be created.
		Unchecked (Default)	Create Catalogue records as well as Stockitems

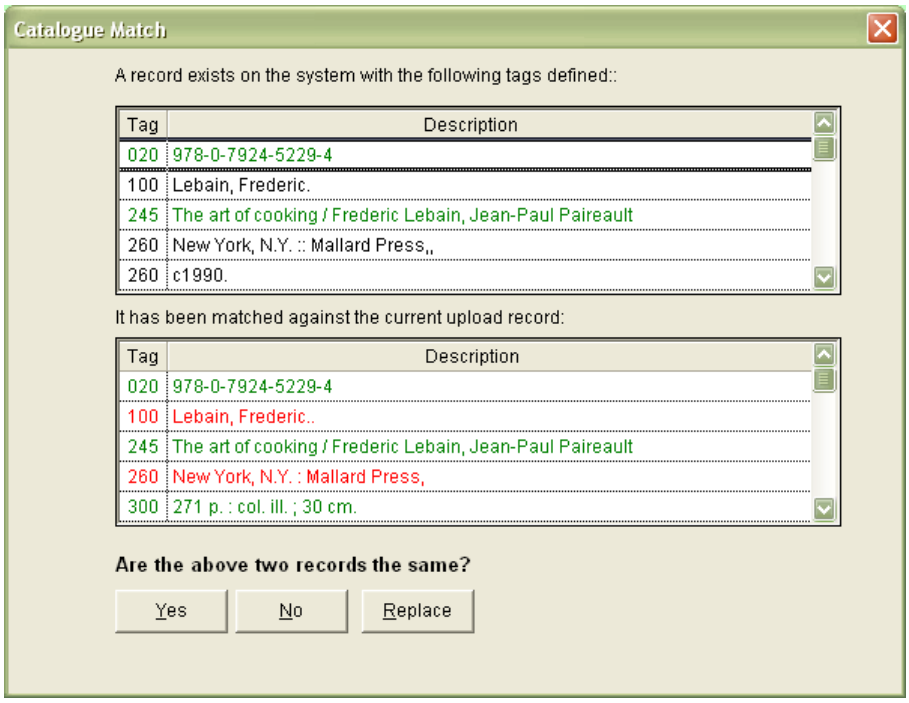
2. Enter the options you would like, then click the **OK** button – the Saved Files screen will display:



3. Type the names of the files into which all the newly created **Catalogues**, **Authorities** and/or **Stockitems** will be saved (if you do not want to check new items – for example: **Authorities**, do not enter a filename)
4. Click the **OK** button

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

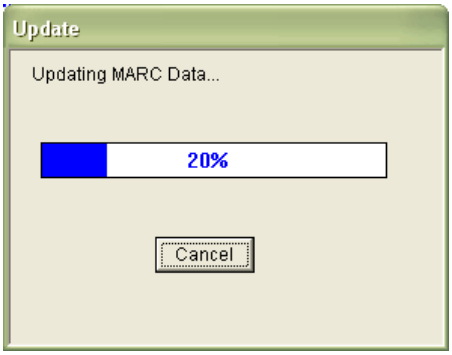
5. If confirmation of duplicate items has been requested in the parameters, a Catalogue Match screen will display every time a duplicate item is found:



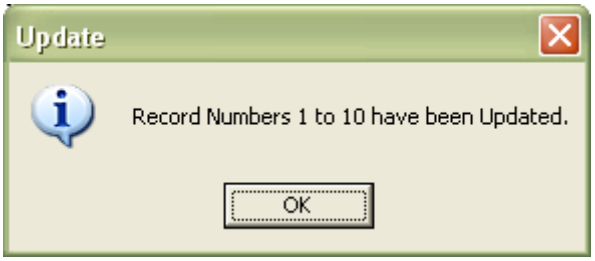
6. **Are the above two records the same?** Click the **Yes**, **No** or **Replace** button

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

7. An Update prompt will display, indicating the progress of the import:



8. When the update is finished an Update prompt will display, showing the number of records Updated: **Record Numbers X to X have been Updated.**



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

F6 Marc Log

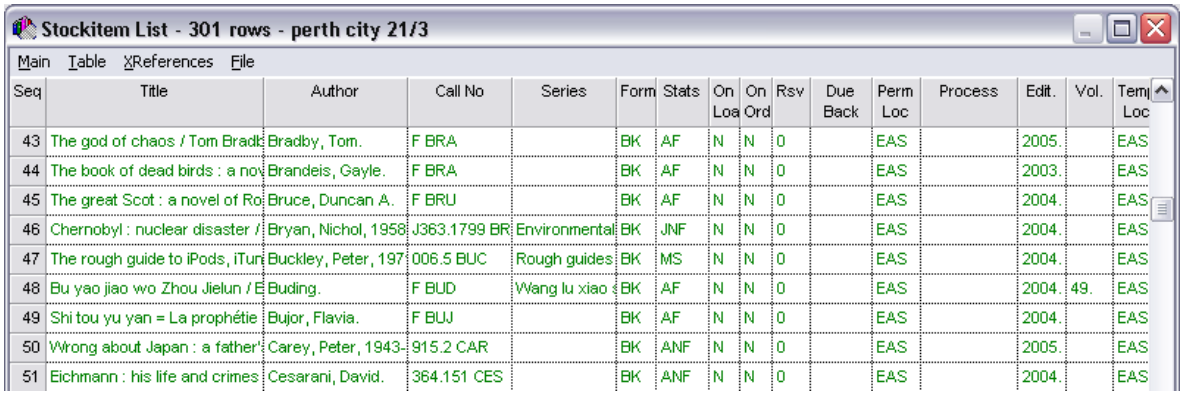
This log lists any errors that were experienced in the process of importing the file and also what action was taken with certain items. Most of the errors that display in the log are caused by the tag numbers not being defined on the Amlib database. This may be because we did not wish to use them in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

Accessing a File after Import

If you had entered file names into Catalogue, Authorities and/or Stockitems, it is possible to access these new records from the Catalogue, Authorities and/or Stockitems applications. Select **File** > **DisplayFile** from the menu in any of these modules and select the relevant file.

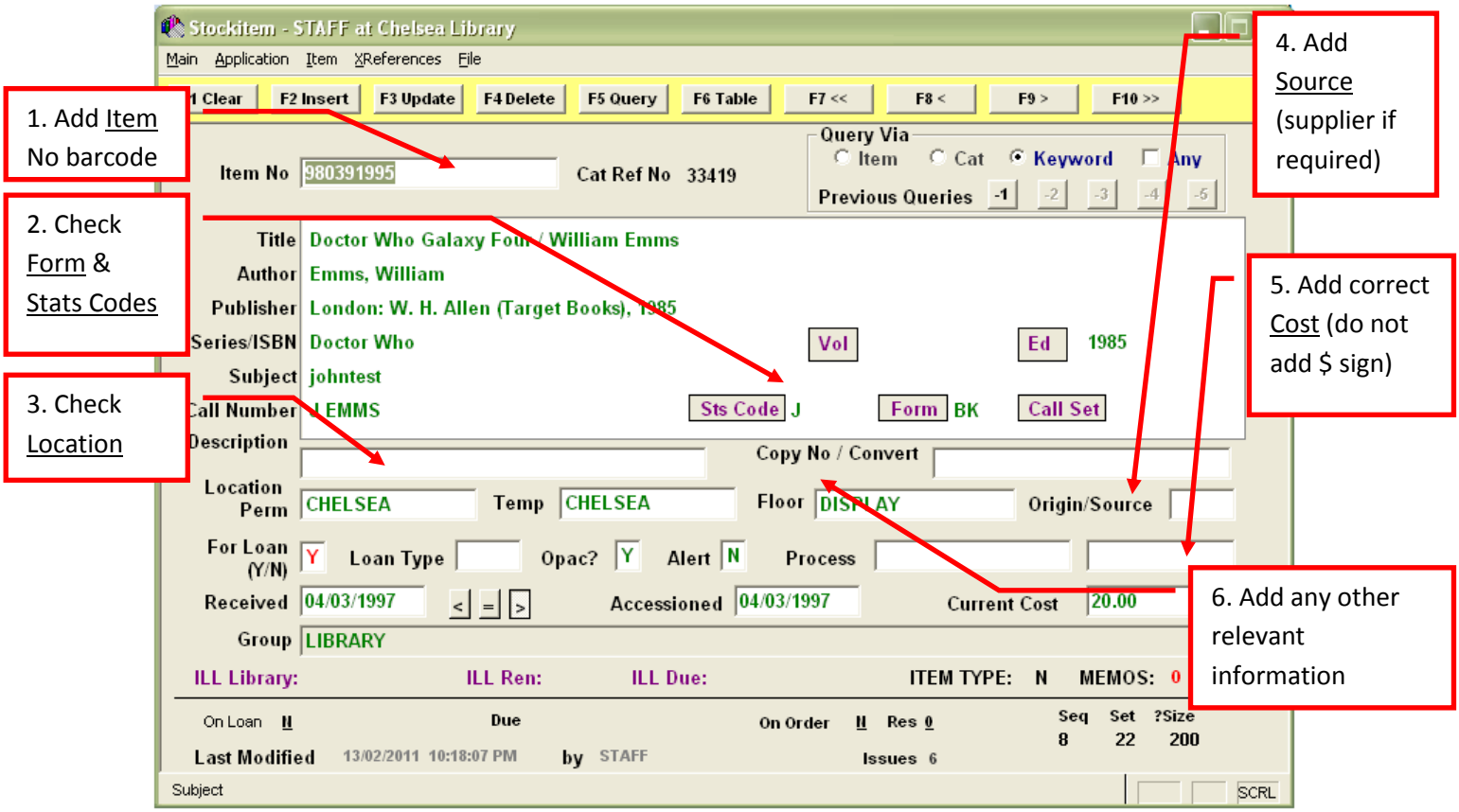
For example: (Stockitem List)

1. Launch the *Amlib* client
2. Go to **Main** > **StockItem** > **Stockitem** – the Stockitem screen will display
3. From the menu, select **File** > **DisplayFile** – the Stockitem Saved Query Results table will display
4. Highlight the file and click the **F9 Select** button – the List of items created on import will display**:**



5. Double-click on an item to display the full record

For Schools: To each new item add the correct Barcode, Current Cost (price), Stats Code, Form code, Source (if required) and generally check other details.



6. To access a list of codes in a field press the **.<Tab>** key. For example: in the Stats Code field, pressing the **.<Tab>** key will display a list of your Stats Codes and Descriptions – double click to make your selection

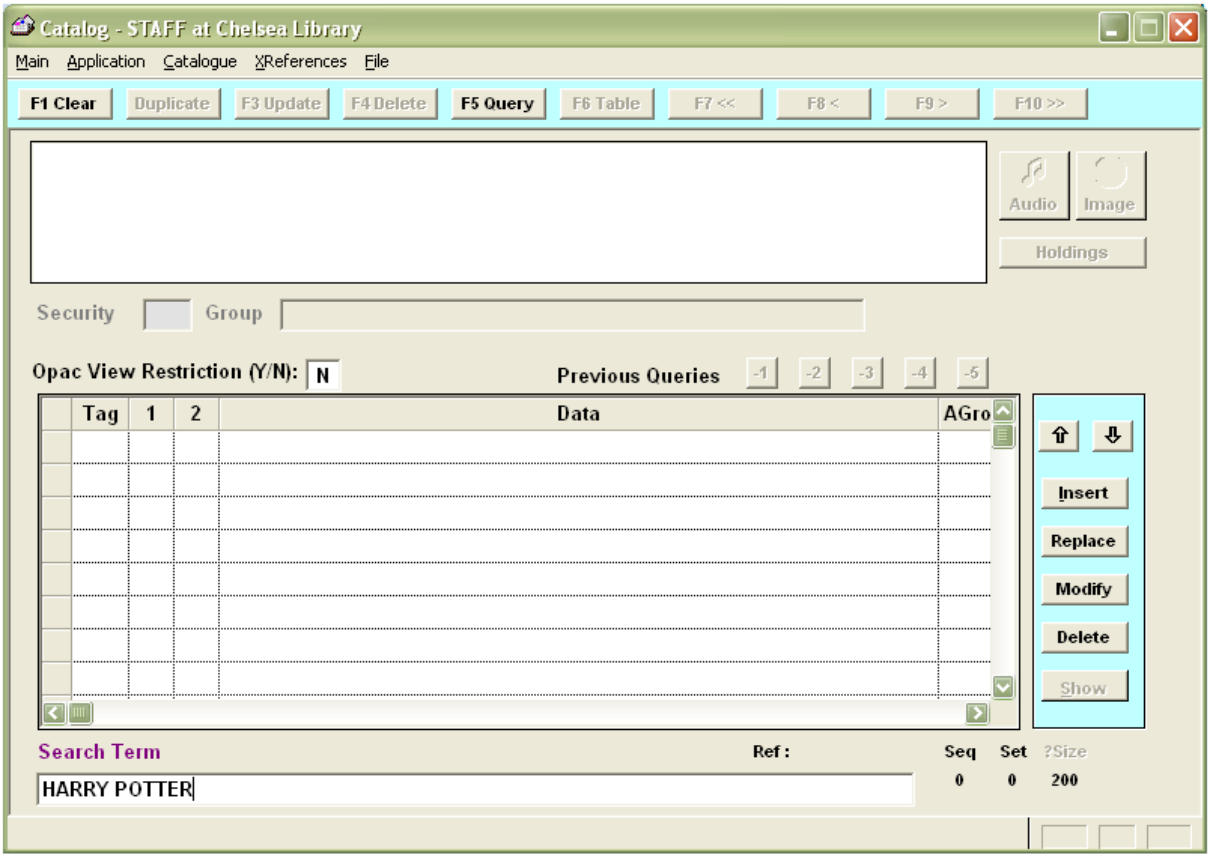
Please Note: If no Stockitems were created during import, then access the Catalogue Saved File – and refer to the Adding Stockitems process outlined as part of the Manually Adding New Records procedure below.

Duplicating Existing Records

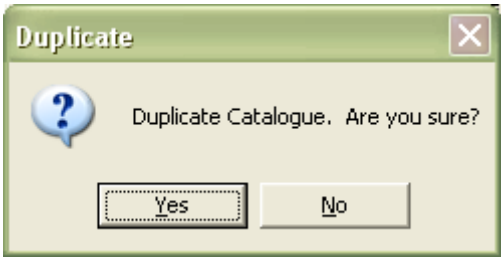
Duplicate [F2]

Used to duplicate (close copy) an existing Catalogue record.

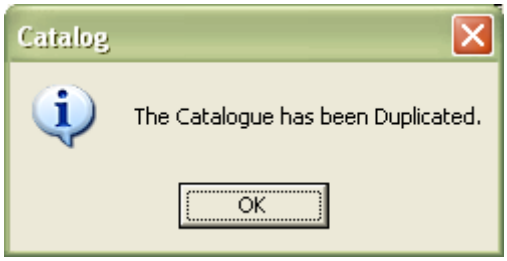
1. Launch the *Amlib* client
2. Go to **Main** > **Catalogue** > **Catalogue** (or the icon) – the Catalog screen will display:



3. Initiate a **F5 Query** to locate the existing catalogue record to be duplicated
4. Click the **Duplicate** [**F2**] button – a prompt with the following message will display: **Duplicate Catalogue. Are you sure?**



5. Clicking the **Yes** button will result in a duplicate catalogue record being created (it will have a different Ref No to the original catalogue record) – the following prompt will display with the following message: **The Catalogue has been Duplicated.**



6. Alterations to the new catalogue record can then be made

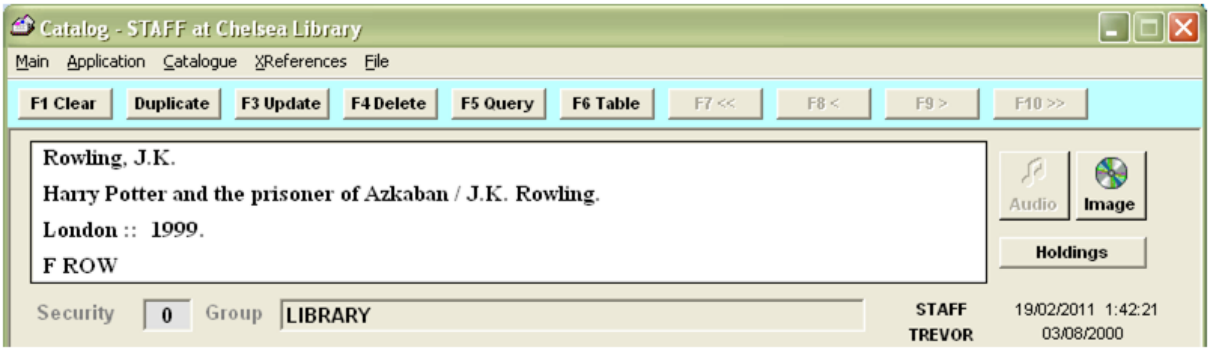
WARNING: The **Modify** button should be used with caution. When used to modify an Authority Tag, the changes will apply to all catalogues using that Authority.

7. Delete Tags you no longer wish to have or replace them with other Tags

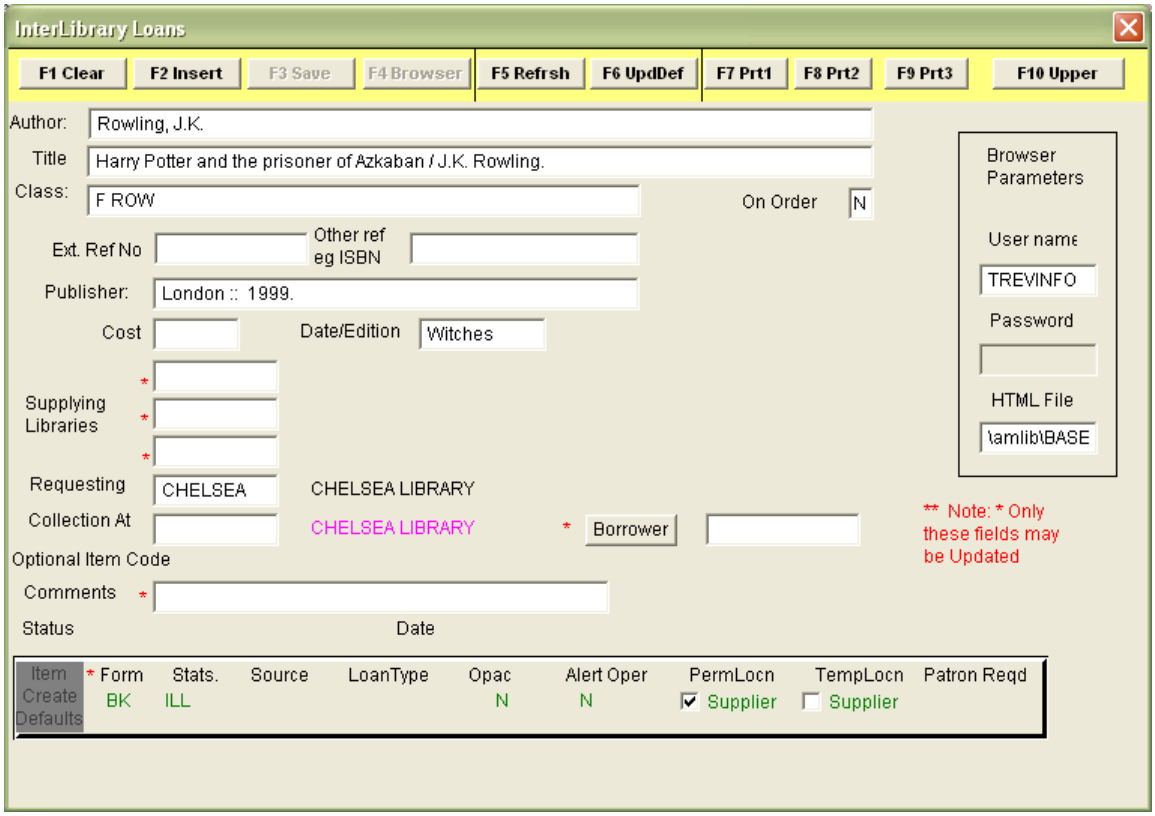
ILL from Catalogue Record

Amlib now enables the ILL screen from a Catalogue record.

1. Launch the *Amlib* client
2. Go to **Main** > **Catalogue** > **Catalogue** (or the icon) – the Catalog screen will display
3. Locate a catalogue record using the **F5 Query** function

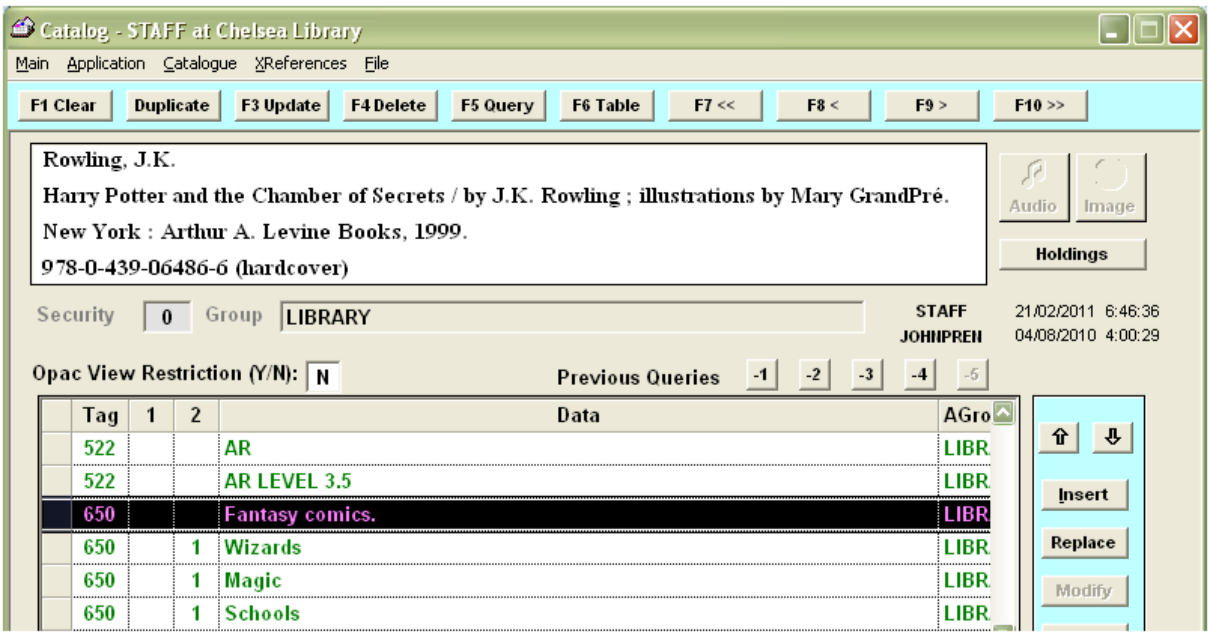


4. From the menu, select **XReferences** > **CreateILL** – the InterLibrary Loans screen will display:


InterLibrary Loans
F1 Clear
F2 Insert
F3 Save
F4 Browser
F5 Refrsh
F6 UpdDef
F7 Prt1
F8 Prt2
F9 Prt3
F10 Upper
Author:
Rowling, J.K.
Title
Harry Potter and the prisoner of Azkaban / J.K. Rowling.
Class:
F ROW
On Order
N
Ext. Ref No
Other ref eg ISBN
Publisher:
London :: 1999.
Cost
Date/Edition
Witches
Supplying Libraries
Requesting
CHELSEA
CHELSEA LIBRARY
Collection At
CHELSEA LIBRARY
Borrower
Optional Item Code
Comments
Status
Date
Item Create Defaults
Form
Stats.
Source
LoanType
Opac
Alert Oper
PermLocn
TempLocn
Patron Reqd
BK
ILL
N
N
Supplier
Supplier
Browser Parameters
User name
TREVINFO
Password
HTML File
\amlib\BASE
** Note: * Only these fields may be Updated

SECTION 3: MODIFYING CATALOGUE RECORDS

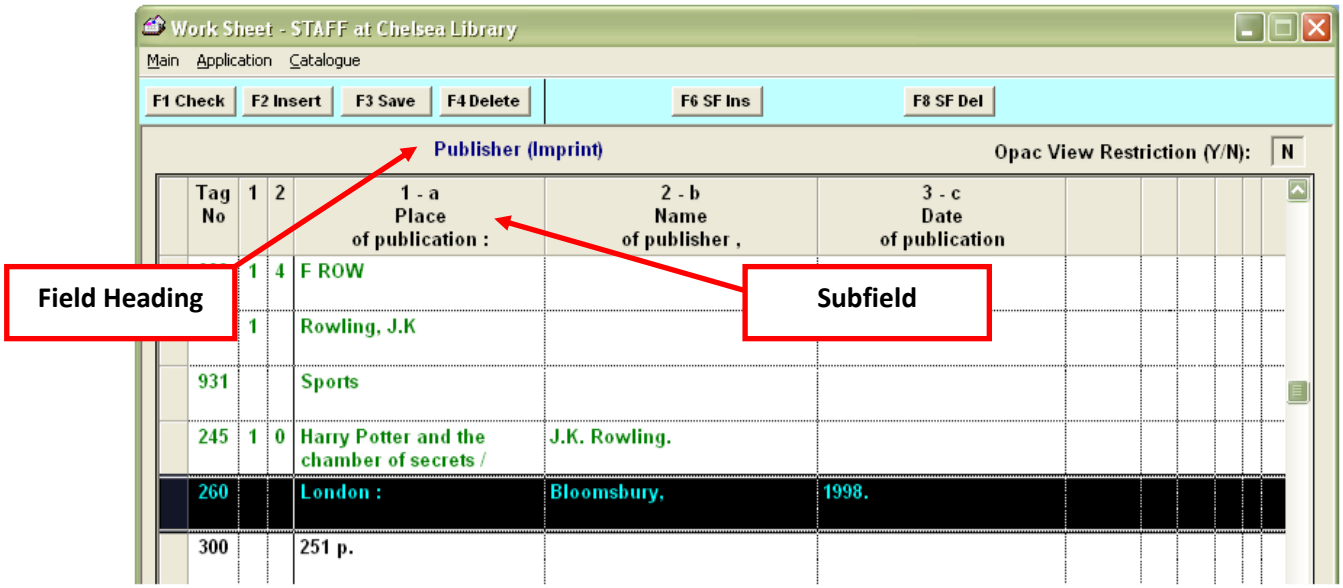
1. Launch the *Amlib* client
2. Go to **Main** > **Catalogue** > **Catalogue** (or the icon) – the Catalog screen will display
3. Initiate a **F5 Query** to locate the Catalogue record that requires editing (alternatively, if the item record is open in the Stockitem module, select **XReferences** > **Catalogue**)



Modify Using the Work Sheet

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

1. From the menu, select **Catalogue** > **Catalog Modify using Worksheet** – the Work Sheet screen will open



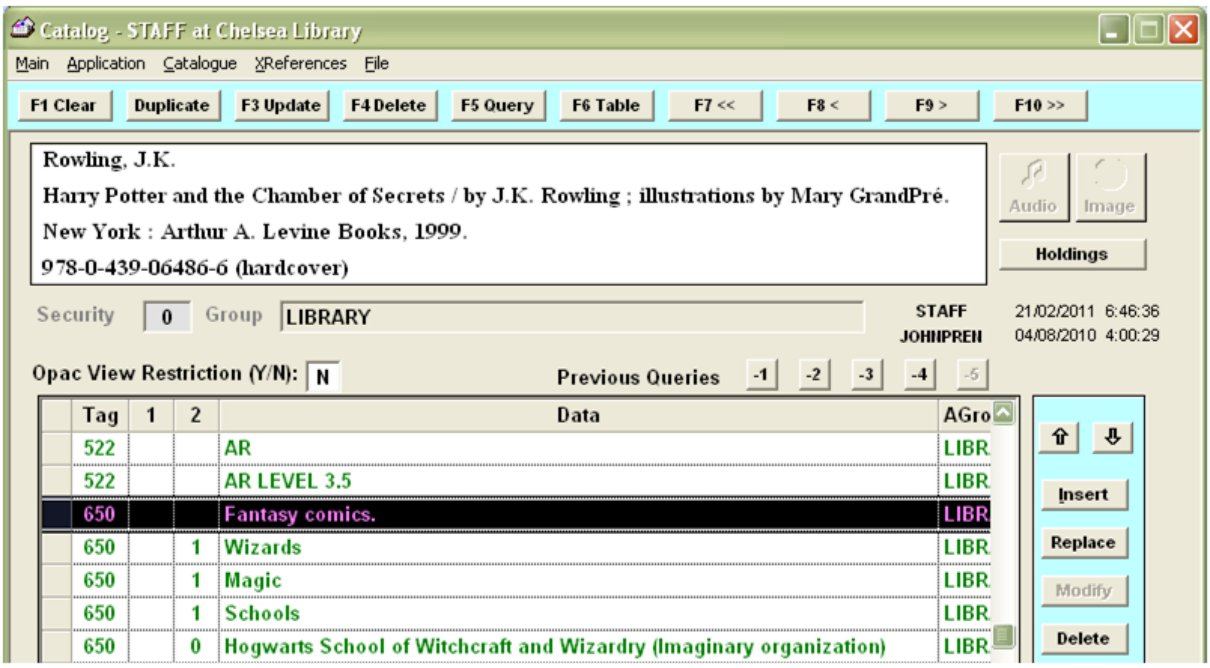
2. The catalogue record can then be edited/modified in the same manner as a new Catalogue record (see above)

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

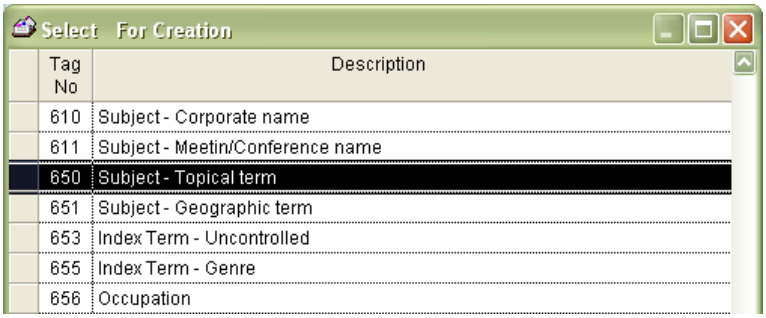
Insert

Inserts a new Tag for the Bibliographic record.

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



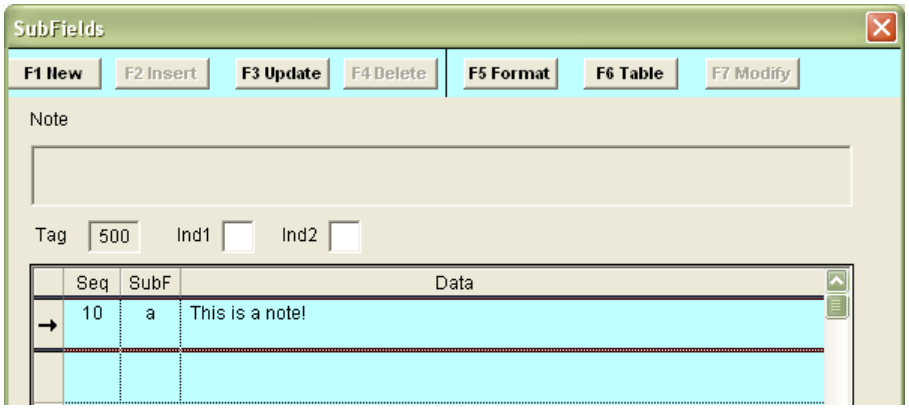
1. Click the **Insert** button on the right-hand side of the screen – the Select For Creation table with a list of Tag Nos will display:



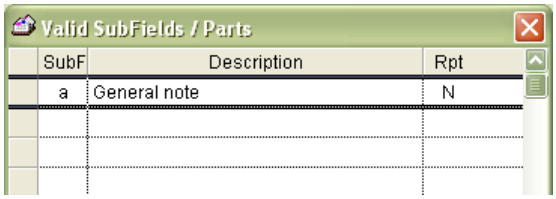
2. Double-click on the desired Tag

Insert Non Authority Tag

1. If the selected Tag is a Non-Authority – the SubFields window will display:



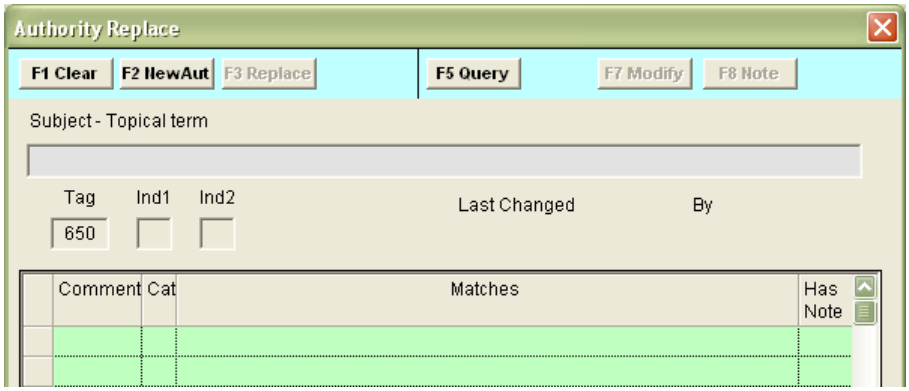
2. Please ensure you enter the correct data into the correct subfield – clicking the **F6 Table** button gives the Valid SubFields/Parts table available for that Tag:



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

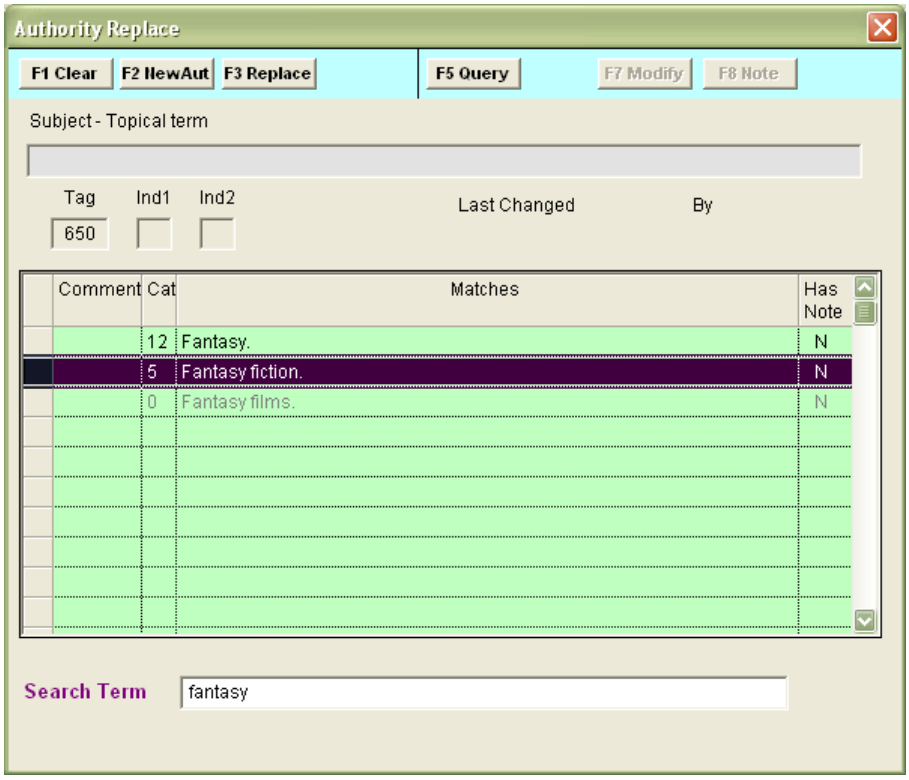
Insert an Authority Tag

1. If the selected Tag is an Authority – the Authority Replace screen will display:



Please Note: Notice the **green** colour of the list (in this example: a **650 | Subject Heading**)? This is because the headings shown come from the *Authorities* module.

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



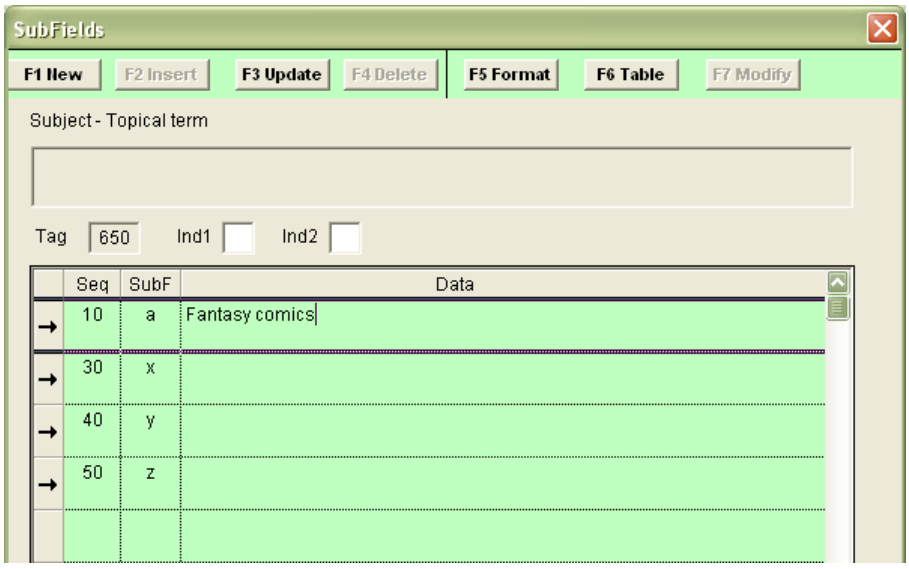
3. If the correct term is in the list:

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

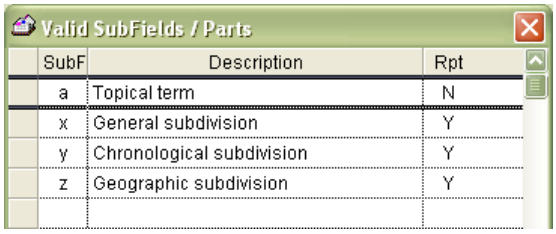
   b. The Authority Replace screen will close and the selected Authority will appear in the catalogue record

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

   a. Click the **F2 NewAut** button – the SubFields screen will display:

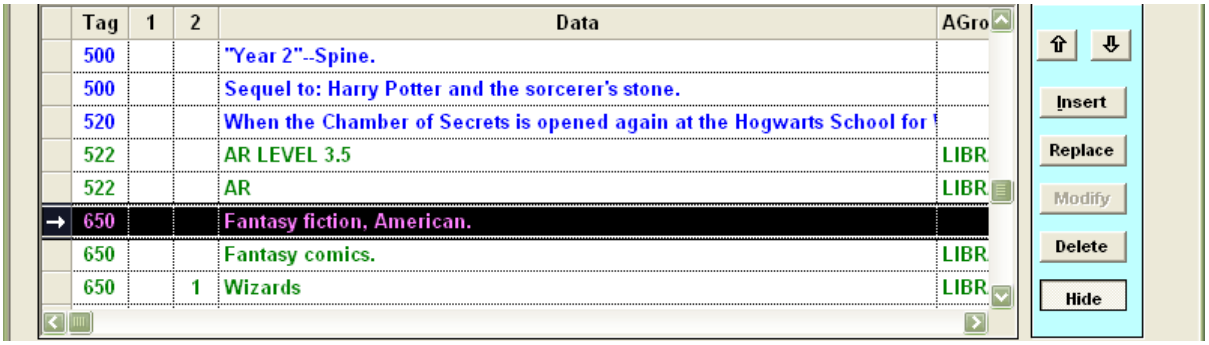


b. Please ensure you enter the correct data into the correct subfield – clicking the **F6 Table** button gives the Valid SubFields/Parts table available for that Tag:



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

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

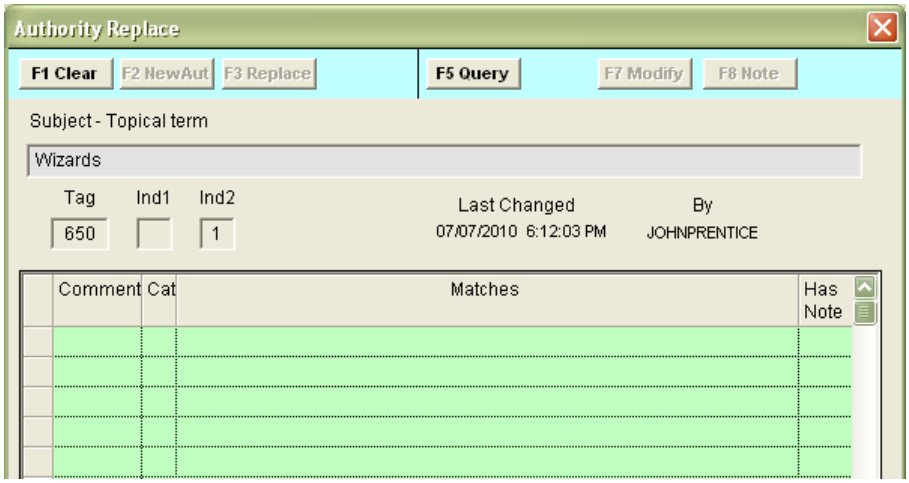


Once the Authority has been entered, it is available for use in subsequent catalogue records.

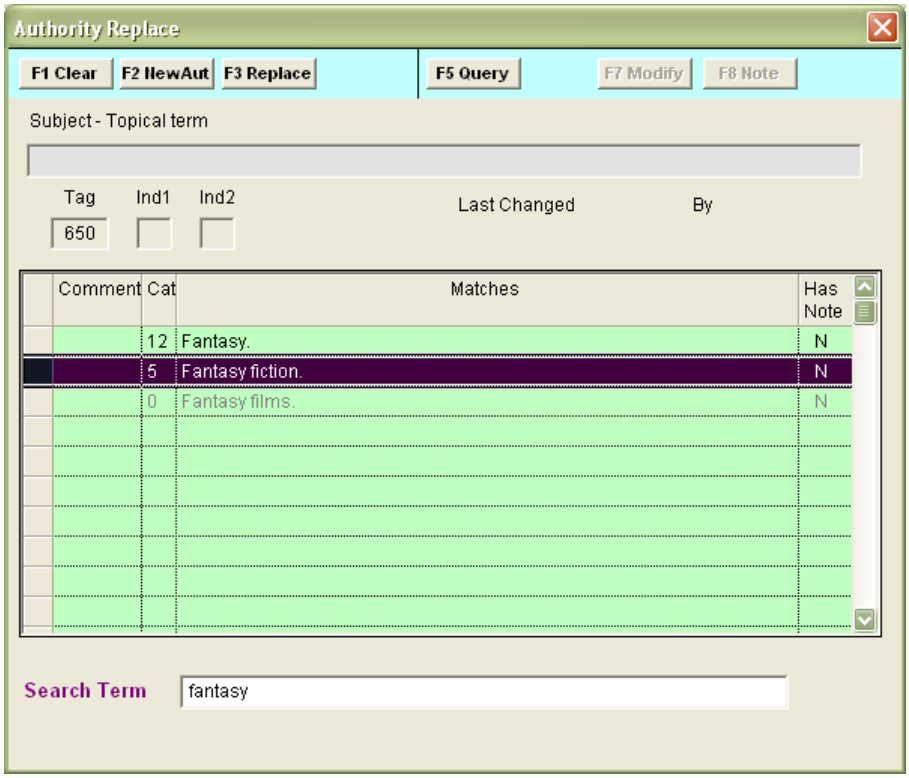
Replace

Replaces the Tag data with an alternative heading.

1. Highlight an Authority to be replaced
2. Click the **Replace** button on the right-hand side of the screen – the Authority Replace screen will display with highlighted Authority:



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



4. If the correct term is in the list:

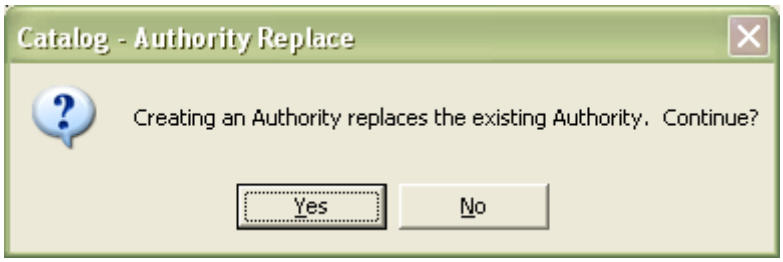
    a. Highlight the term and click the **F3 Replace** button

    b. The Authority Replace window will close and the selected Authority will appear in the catalogue record

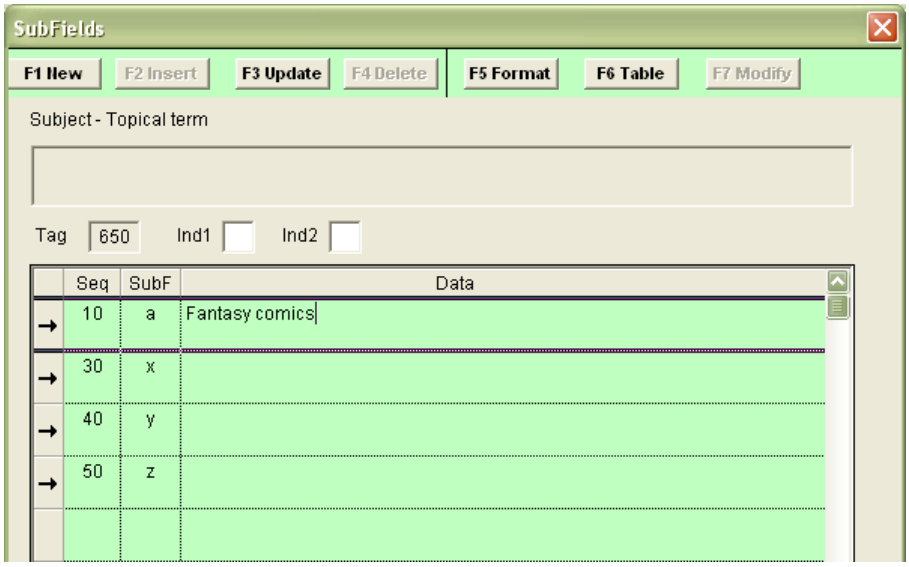
5. If the correct term is NOT in the list or your search gives no results:

    (Please Note: this option **NOT** available if User settings have been set to DISABLE modification of Authorities in the catalogue screen – the **Insert** button should be used to create a new Authority and the existing Authority removed from the record using the **Delete** button)

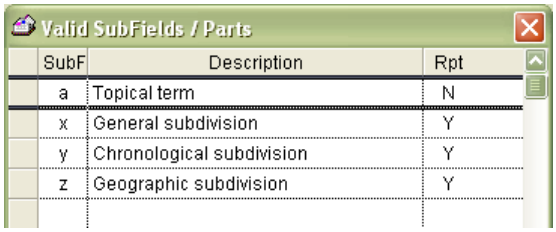
    a. Click the **F2 NewAut** button – a prompt with the following message may display: **Creating an Authority replaces the existing Authority. Continue?**



b. Click on the **Yes** button – the SubFields table will display:

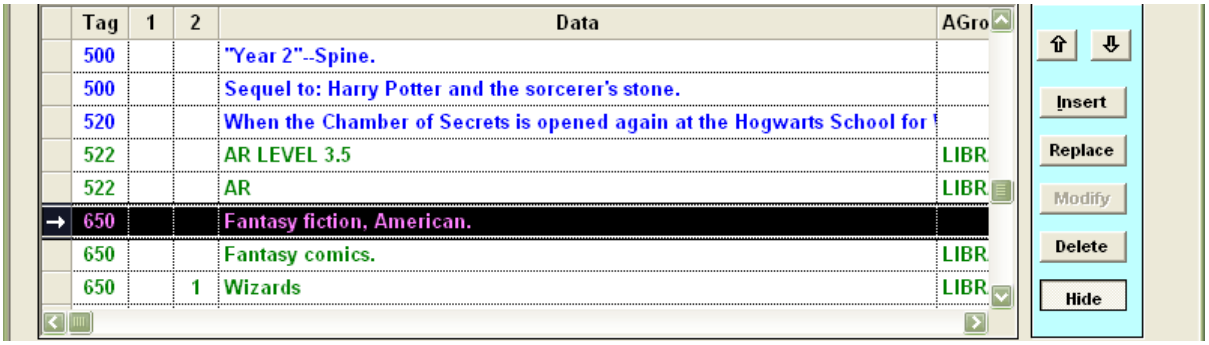


c. Please ensure you enter the correct data into the correct subfield – clicking the **F6 Table** button gives the Valid SubFields/Parts table available for that Tag:



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

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



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

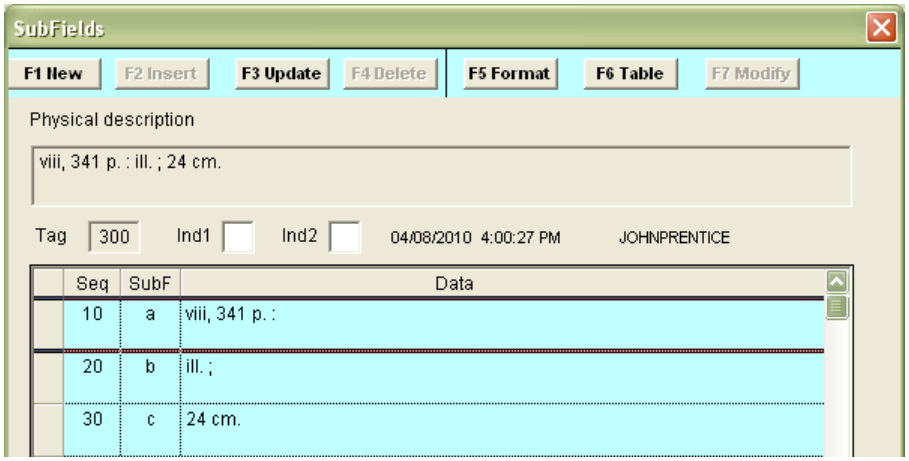
Modify

Please Note: It is possible to update User Name security so as to DISALLOW the editing of Shared Authorities using the **Modify** button. This helps ensure the integrity of the Shared Authorities (which

may be in use in other Catalogue records). Authorities can then be modified by XReferencing to the *Authorities* module.

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

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

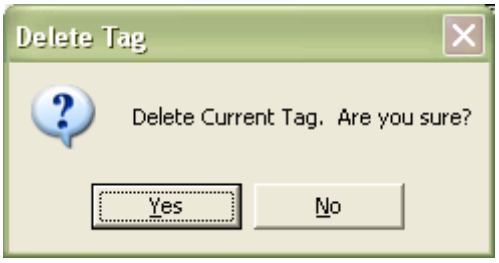


2. Make the changes
3. Click the **F3 Update** button when complete

Delete

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

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



2. Click the **Yes** button
3. The Tag will be deleted

Hide/Show

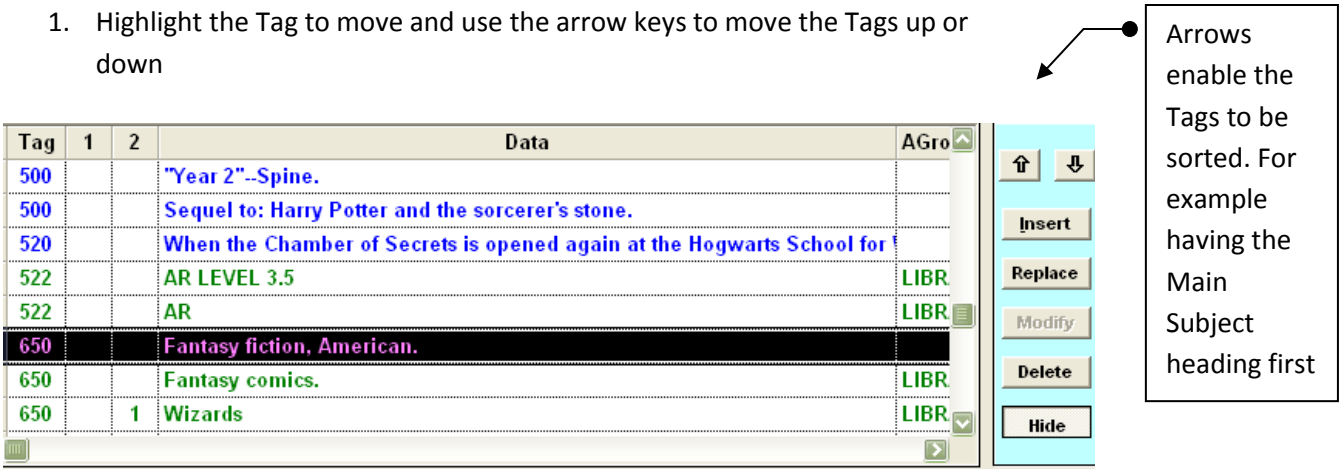
Alternates between hiding/showing tags for this record.

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

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

Movement of Tags

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

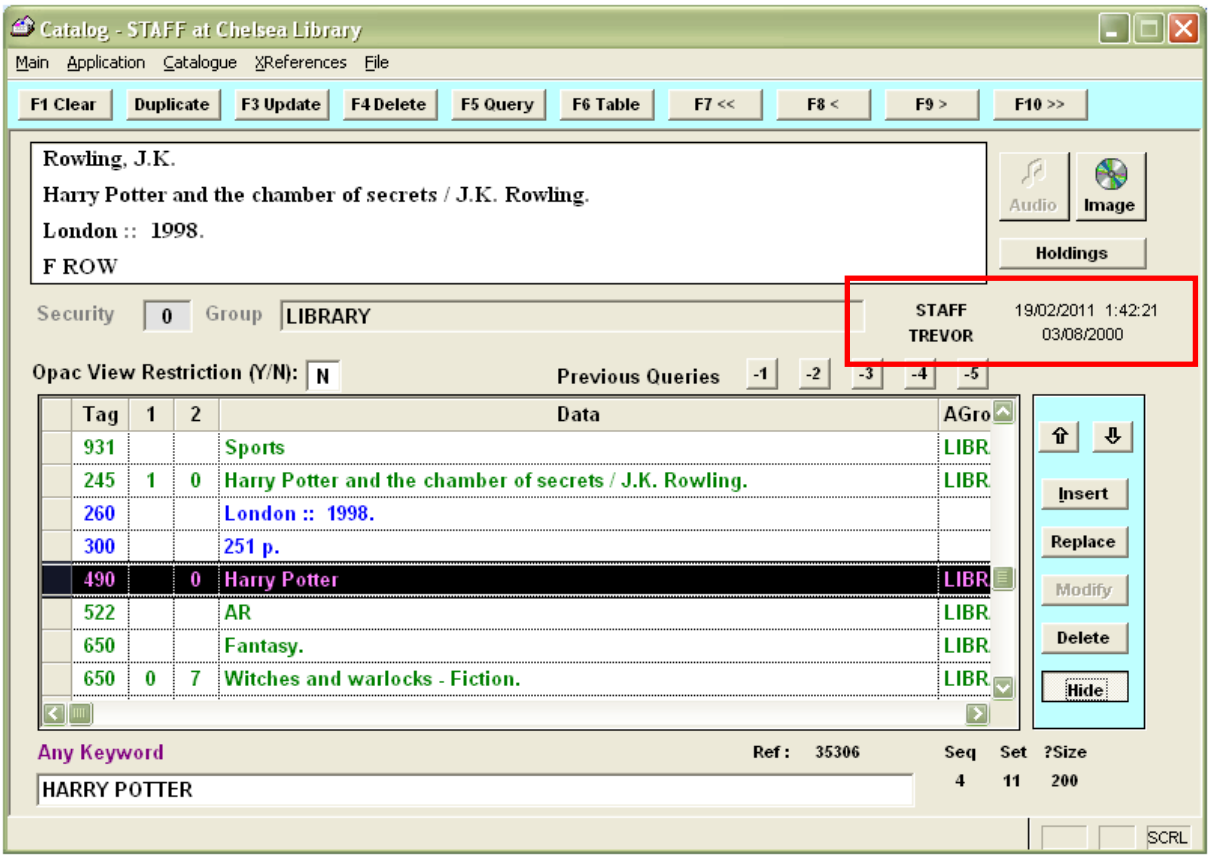


Please Note: This sequencing possible within the record depends on what is set in the **Main** > **Supervisor** > **Installation** – Catalogue tab parameter line: **Allow tags to be sequenced anywhere within a catalogue (Y/N)** – see here for further details.

- If it is left at the default **Y**, staff will be able to use the up and down arrows on the Catalogue record to reposition any MARC Tag within that record
- If it is changed to **N**, this will then restrict the ability for adjusting the sequence of a MARC tag in a specific record to its specific range only. This means that if there is only one MARC tag to that record it cannot be moved, but if there is more than one MARC tag, for example subject headings, then these can be moved within this group only

Catalogue Record Created / Last Edited Information

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



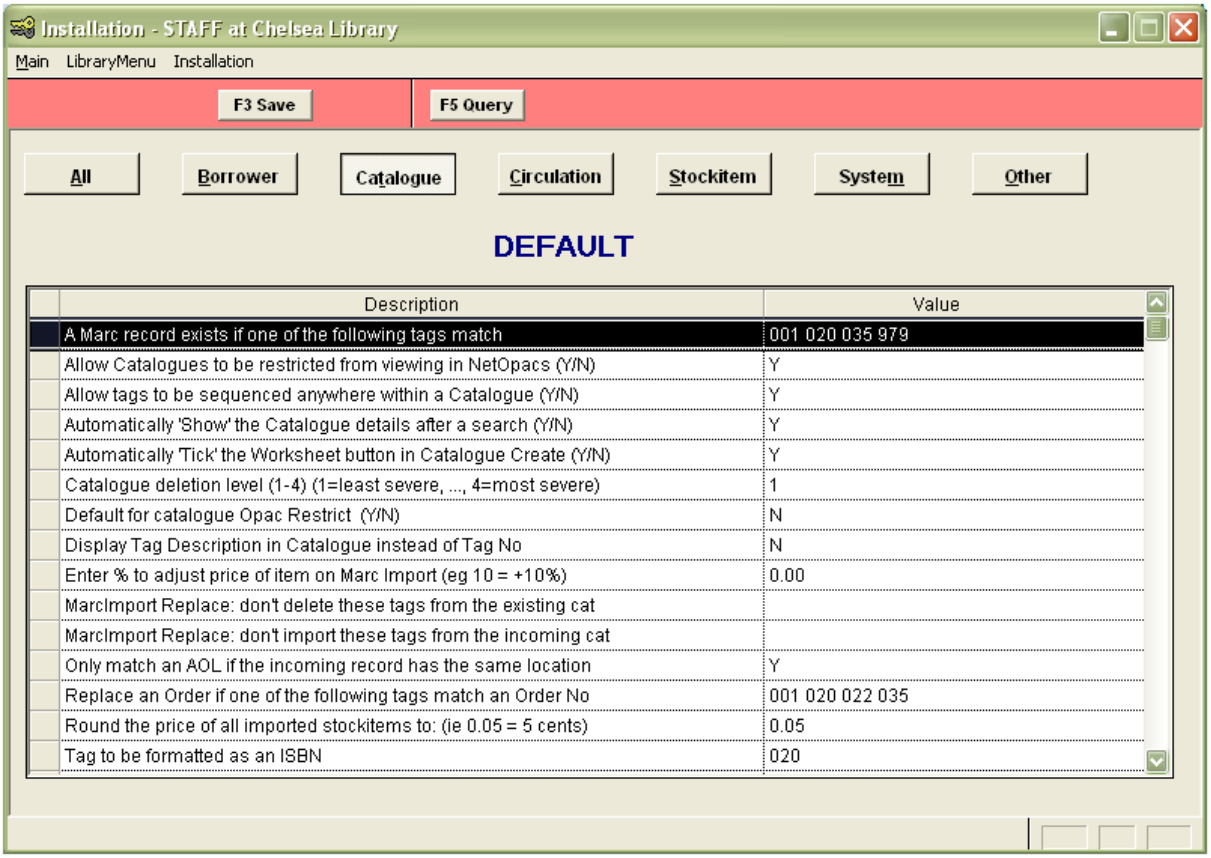
SECTION 4: PARAMETERS

Supervisor

Installation: Catalogue Defaults

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

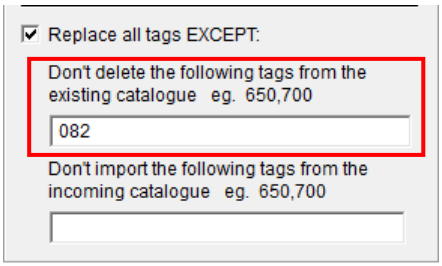
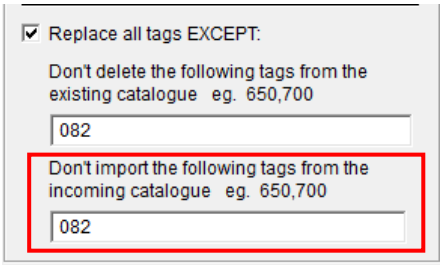
1. Launch the *Amlib* client
2. Go to **Main** > **Supervisor** > **Installation** – the Installation (DEFAULT) screen will display
3. Select the **Catalogue** tab:



4. Type the desired settings into the Value column (see the following list for parameters to adjust)
5. Click the **F3 Save** button when complete
6. Exit and restart the *Amlib* client for these settings to take effect

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

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

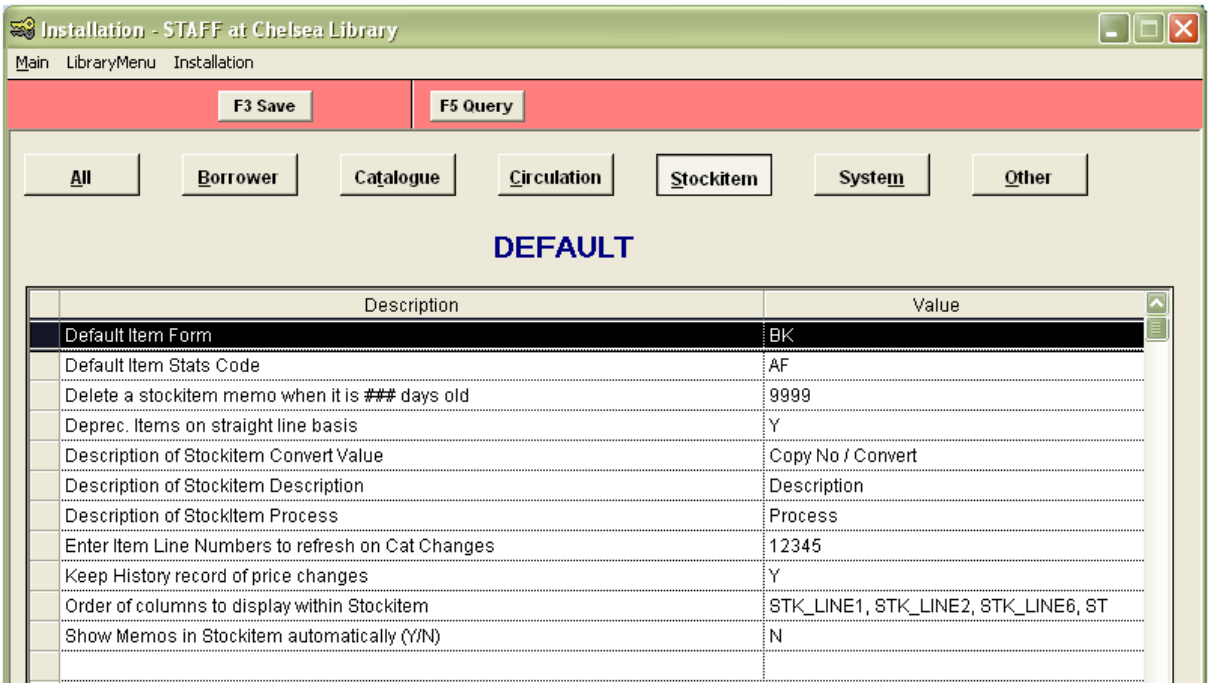
Enter % to adjust price on item on Marc Import (eg 10 = +10%)	The percentage entered will be the default price adjustment in the Bibliographic Option screen during the Marc Import. This allows for the Item Price during Marc Import to be appreciated automatically. For example: to allow for GST. This default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

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

Installation: Stockitem Defaults

The setting for this is contained in the Installation settings:

1. Launch the *Amlib* client
2. Go to **Main** > **Supervisor** > **Installation** – the Installation (DEFAULT) screen will display
3. Select the **Stockitem** tab:



4. Type the desired setting into the Value column (see the following list for parameters to adjust)
5. Click the **F3 Save** button when complete
6. Exit and restart the *Amlib* client for these settings to take effect

It is also possible to adjust these settings by individual Location (see above).

FIELD	EXPLANATION	EXAMPLE
Default Item Form	Allows you to define the default Form code to be automatically generated for new items (this also sets the default labels used on the Stockitem screen)	**BK**
Default Item Stats Code	Allows you to define the default Stats Code to be automatically generated for new items	**ANF**
Delete a stockitem memo when it is ### days old	When creating an Stockitem memo you may supply an expiry date. Otherwise the system will calculate the expiry as being the current date plus the number of days entered in this field. A report can be run to identify memos that should be deleted from the system.	**365**

Deprec. Items on a straight line basis	Regardless of the depreciation method, the same depreciation tables are used within *Amlib*. The essential difference is in the calculation and which cost price is used for the calculation. Set to Y: Depreciate using Original cost and percentage to calculate number of years for depreciation Set to N: Depreciate using Current cost and percentage to give the item a Reducing Balance based on number of years for depreciation. See: **Stockitem** screen > **Application** > **StockStatsGroup** – **F7 AccPri**	**Y**
Description of Stockitem Convert Value	This allows you to define you own label for this field on the Stockitem screen.	**Copy No / Convert**
Description of Stockitem Description		**Description**
Description of Stockitem Process		**Process** or **Status**
Enter Item Line Numbers to refresh on Cat Changes	Stockitem lines entered will automatically be refreshed if the associated Tags are updated in the Catalogue module. Line Numbers are entered, without spaces or commas. If the automatic refresh is not required, enter **0**.	**12345**
Keep History record of price changes	If set to **Y**, an audit is kept of depreciation changes made to Stockitem prices, which can be reported using a Stockitem History report	**Y**
Order of columns to display within Stockitem	The order of columns in the Stockitem List screen may be changed using this parameter. (If you do change this you may have to adjust your Stockitem List screen report template: **$ITELIST.QRP**) The names of the columns need to be typed in CAPITALS, comma separated (,) in the order that you want them to display. You do not need to type in all the column names. The column names you type in will be placed at the beginning of the table and the default will continue for any column names you have not typed in The Table below displays the fields that can be used for the display.	See Table below
Show Memos in Stockitem automatically (Y/N)		**Y**

Stockitem Fields for Table Sequence

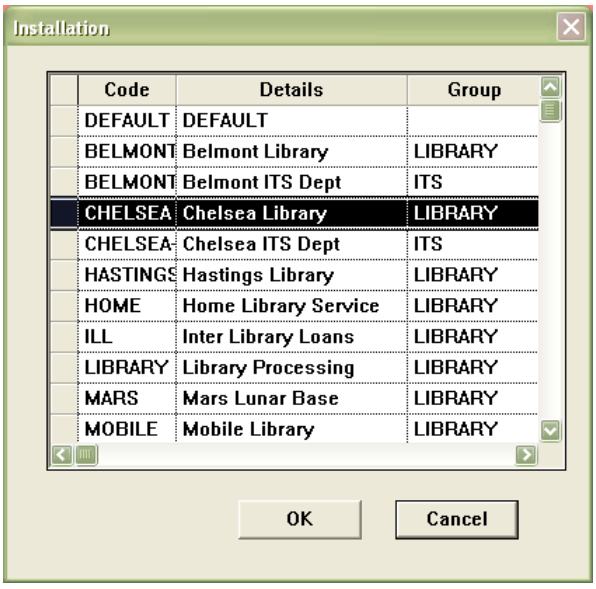
The following fields can be used to create the list:

TITLE IN TABLE	COLUMN NAME	TITLE IN TABLE	COLUMN NAME
Title	**STK_LINE1**	Volume	**STK_VOLUME**
Author	**STK_LINE2**	Temp Location	**STK_LOC_TEMP**
Call No	**STK_LINE6**	Floor Location	**STK_LOC_FLOOR**
Form	**STK_FORM**	Item No (barcode)	**STK_ITEM_NO**
StatsCode	**STK_STATS_CODE**	Convert Val.	**STK_CONVERT_VALUE**
On Loan?	**STK_IS_ON_LOAN**	Description	**STK_DESCRIPTION**
On Order?	**STK_IS_ON_ORDER**	Borrower barcode	**STK_BOR_BAR_NO**
Reserved?	**STK_IS_RESERVED**	Borrower Name	**STK_BOR_NAME**
Due Date	**STK_ISS_DUE**	ILL Supplier	**STK_ILL_SUPP**
Perm Location	**STK_LOC_PERM**	ILL Renew	**STK_ILL_RENEW**
Process	**STK_PROCESS**	ILL Due Date	**STK_ILL_DUE**
Edition	**STK_EDITION**	Call Set	**STK_CALL_SET**

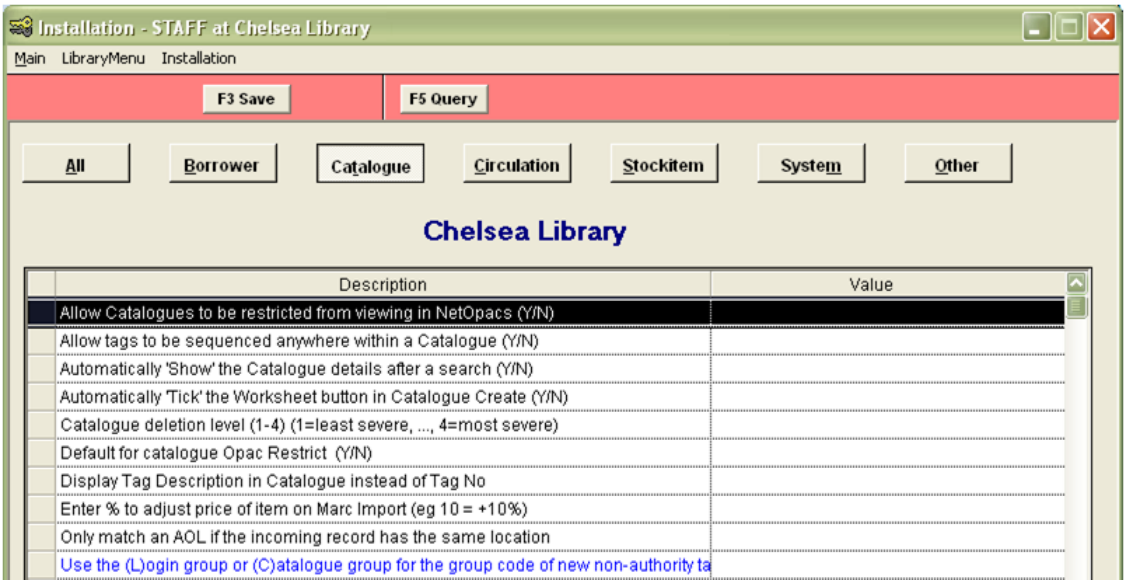
Installation: Defaults by Individual Location

It is also possible to adjust some Catalogue and Stockitem settings by individual Location.

1. In the *Supervisor* module Installation screen menu, select **Installation** > **Choose Location** – the Installation location prompt will display:



2. Select a location (for example: **Chelsea Library**) and click the **OK** button – the Installation screen for that location will then display
3. Select the **Catalogue** (or **Stockitem**) tab:



If you would like to use the DEFAULT setting for any parameters, then you can leave the settings in this table blank (any changes to the settings on this screen will only apply to that location)

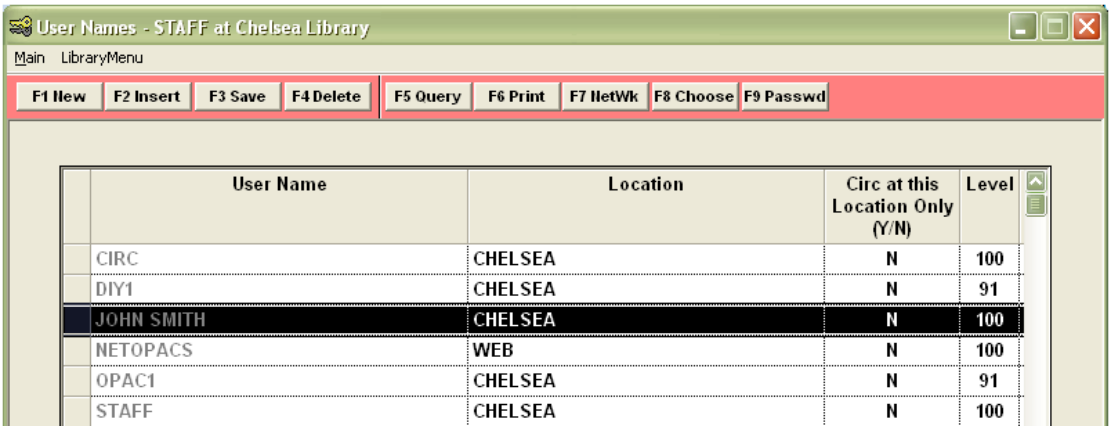
4. Type the desired settings into the Value column
5. Click the **F3 Save** button when complete
6. Exit and restart the *Amlib* client for these settings to take effect

User Security: Modify a Shared Authority in the Catalogue Screen

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

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

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

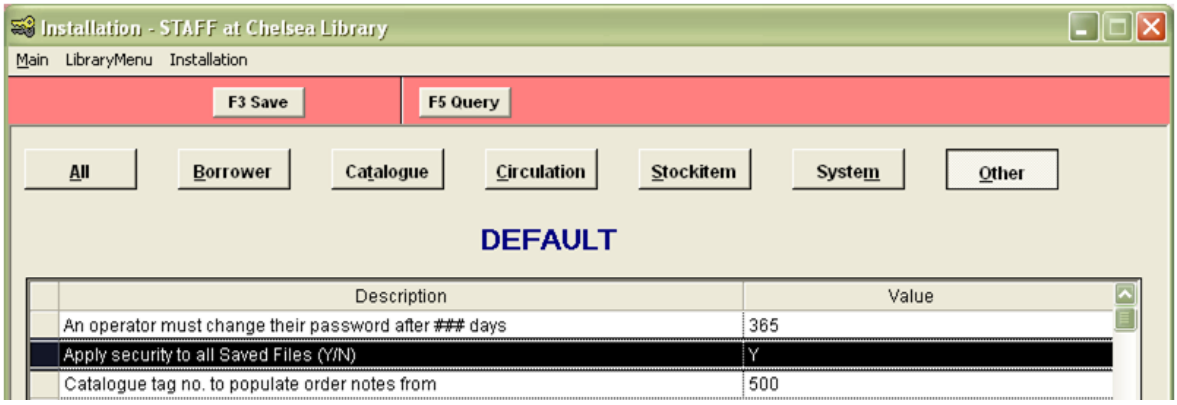


3. Select a **User Name** in the table and click the **F8 Choose** button – the User Security screen will display:

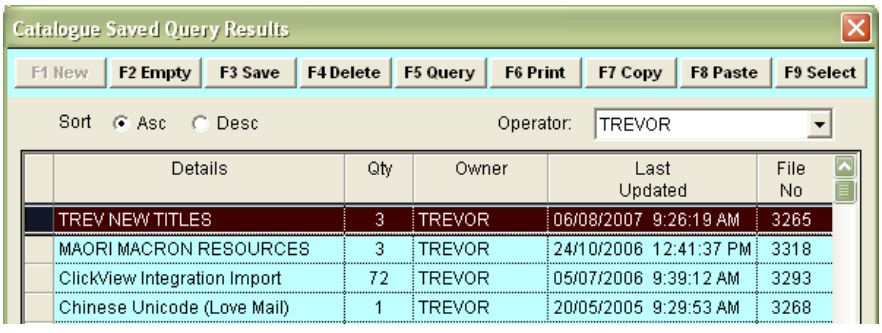
4. From the main User Security menu, select **ActualMainMenu** > **Catalogues** > **Catalogue – NoSharedAuthUpdate**
5. Menu Chosen display should now be: **Catalogue.NoAuthUpdate**
6. Click the green **Give** button to DISABLE the Users ability to modify a Shared Authority in the Catalogue module
7. Close the User Security screen by clicking on the red **[X]**
8. Exit and restart the *Amlib* client for these settings to take effect

All Modules: Saved Files

1. Launch the *Amlib* client
2. Go to **Main** > **Supervisor** > **Installation** – the Installation (DEFAULT) screen will display
3. Select the Other tab:

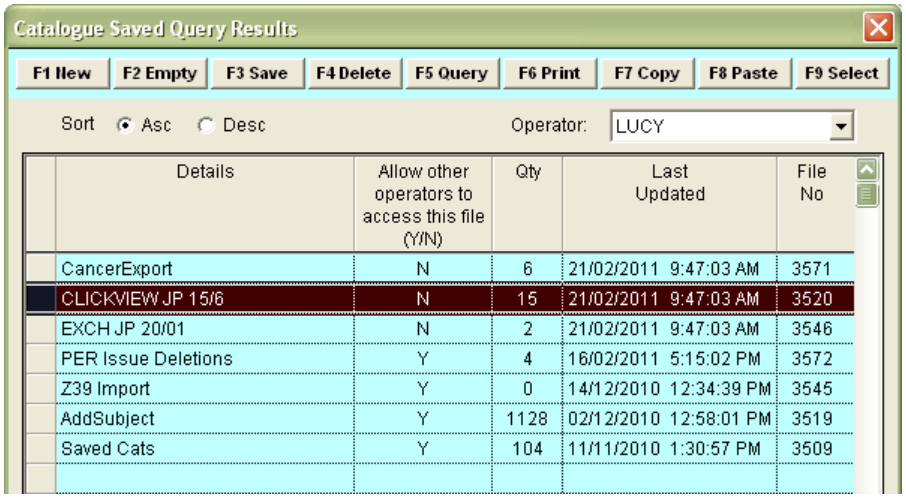


4. Apply security to all Saved Files (Y/N) can be set for all saved files in any module that has this function available. If this is set to **N** (for **No**) when saved files are viewed, the screen displays as shown:



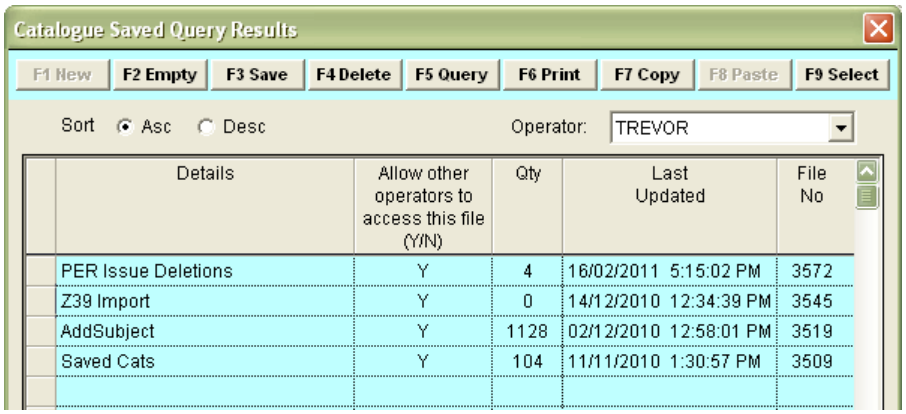
If the parameter value is **Y** (for **Yes**) this allows the operator to stipulate whether other operators are able to access this file when the file is being created. The operator who created this file can also modify

the column at a later time. When other operators select to view another operator's files, only the ones with a **Y** (for **Yes**) in the Allow other operators to access this file (Y/N) column will be displayed:



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

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



5. Change the setting as desired and click the **F3 Save** button
6. Exit and restart the *Amlib* client for these settings to take effect

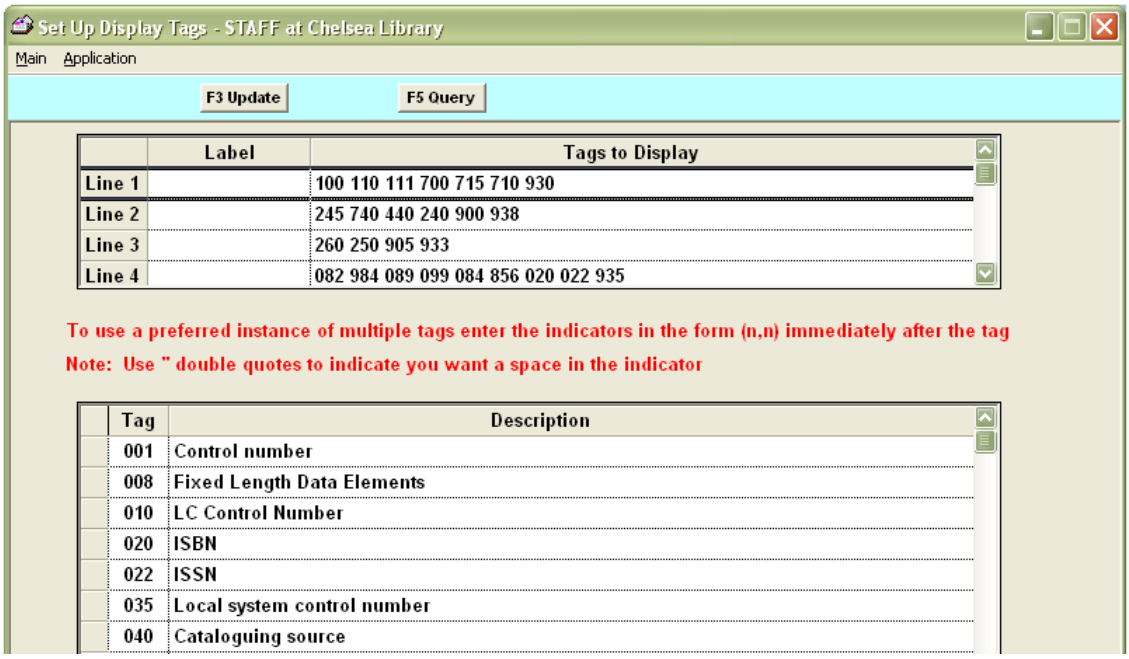
This setting can also be set by Individual Location.

Catalogue

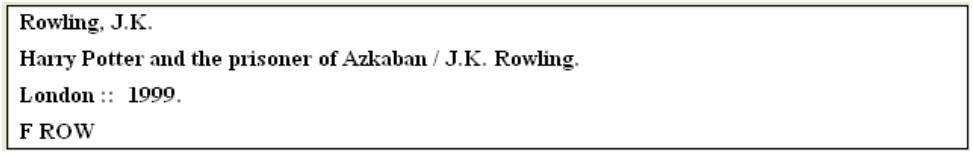
Display Tags

This screen allows you to set up which Tags display in the Display Tags for the brief catalogue record that appears in the window at the top of the Catalog screen (which is also what appears in the Catalogue List). This table is usually set up when your system is first loaded or perhaps after a major re-organisation of the system.

1. Launch the *Amlib* client
2. Go to **Main** > **Catalogue** > **CatDisplayTags** – the Set Up Display Tags table will display:



3. Define the Label and Tags to Display for each Line – these Tags (and their Labels) define how the brief details of a catalogue record display at the top of the Catalog screen:



More than one tag can be added to the Tags to Display column. The tags should be added in order of preference – for example: **100 110 700**. If the **100** tag is present in a Catalogue record then the contents will display for that Line. If no **100** tag is present, then the contents of the **110** tag will display, and so on.

4. Click the **F3 Save** button when complete
5. Close the *Catalogue* module for these settings to take effect

Please Note: You will then need to rebuild the catalogue display for the existing catalogue records.

- See: Appendix 6: Catalogue Maintenance Tasks for more information

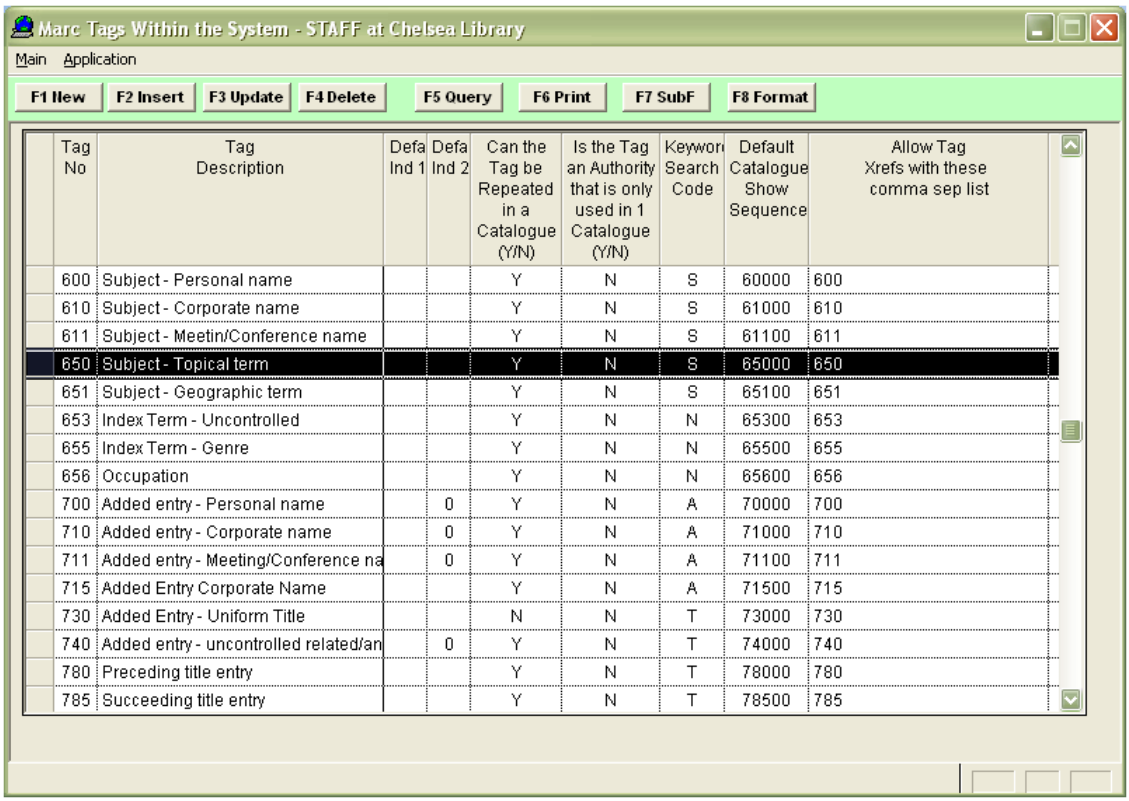
Authority

Punctuation

Punctuation usually comes with the imported data. An exception to this is the inclusion of hyphens between Subject Headings and the subdivision. This formatting is set up in the *Authorities* module (usually **Standard**).

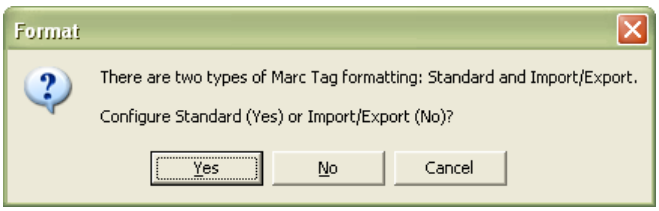
WARNING: Adding punctuation to other MARC tags may affect the importing of records from cataloguing agencies where punctuation is taken from the imported record rather than the *Amlib* system. If punctuation is added using **F8 Format**, duplicated punctuation may result.

1. Launch the *Amlib* client
2. Go to **Main** > **Authorities** > **MarcTags** – the Marc Tags Within the System table will display:

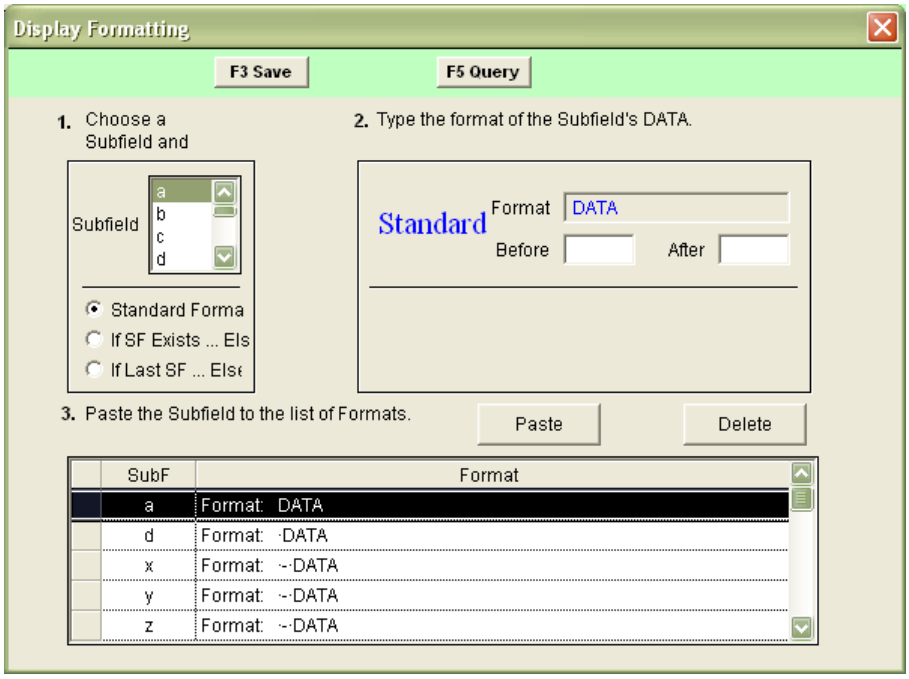


Tag No	Tag Description	Defa Ind 1	Defa Ind 2	Can the Tag be Repeated in a Catalogue (Y/N)	Is the Tag an Authority that is only used in 1 Catalogue (Y/N)	Keywor Search Code	Default Catalogue Show Sequence	Allow Tag Xrefs with these comma sep list
600	Subject - Personal name			Y	N	S	60000	600
610	Subject - Corporate name			Y	N	S	61000	610
611	Subject - Meetin/Conference name			Y	N	S	61100	611
650	Subject - Topical term			Y	N	S	65000	650
651	Subject - Geographic term			Y	N	S	65100	651
653	Index Term - Uncontrolled			Y	N	N	65300	653
655	Index Term - Genre			Y	N	N	65500	655
656	Occupation			Y	N	N	65600	656
700	Added entry - Personal name		0	Y	N	A	70000	700
710	Added entry - Corporate name		0	Y	N	A	71000	710
711	Added entry - Meeting/Conference na		0	Y	N	A	71100	711
715	Added Entry Corporate Name			Y	N	A	71500	715
730	Added Entry - Uniform Title			N	N	T	73000	730
740	Added entry - uncontrolled related/an		0	Y	N	T	74000	740
780	Preceding title entry			Y	N	T	78000	780
785	Succeeding title entry			Y	N	T	78500	785

3. Highlight a Subject-related MARC tag – for example: **650**
4. Click the F**8 Format** button – a prompt with the following message will display: **There are two types of Marc Tag formatting: Standard and Import/Export. Configure Standard (Yes) or Import/Export (No)?**



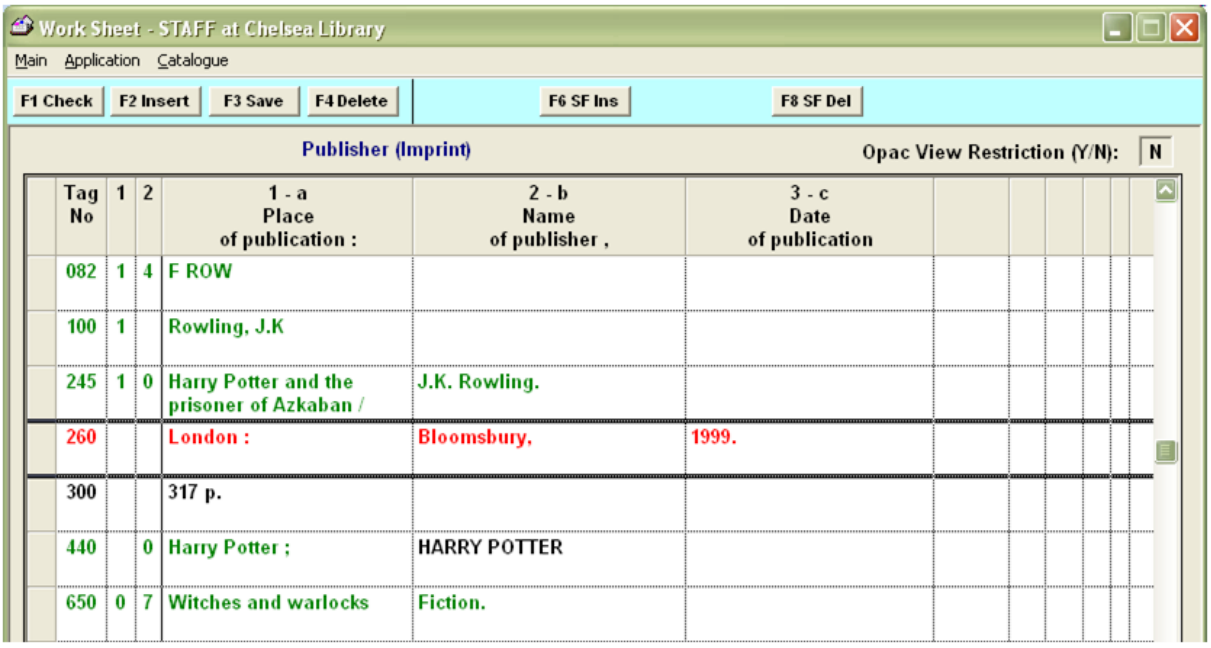
5. Click the **Yes** button – the Display Formatting screen will display:



6. Adjust the punctuation as required
7. Click the **F3 Save** button when complete

Please refer to the *Authorities Training Manual* for further information about setting up formatting on MARC tags.

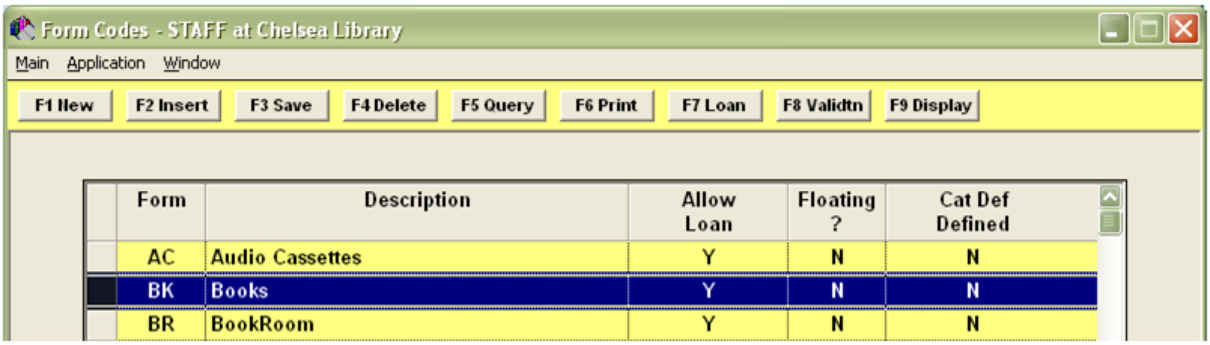
- Punctuation in manually created records is usually entered manually with the exception of the Subject Heading divisions (as described above). Refer to the **AACR2** for exact punctuation requirements when cataloguing an item.



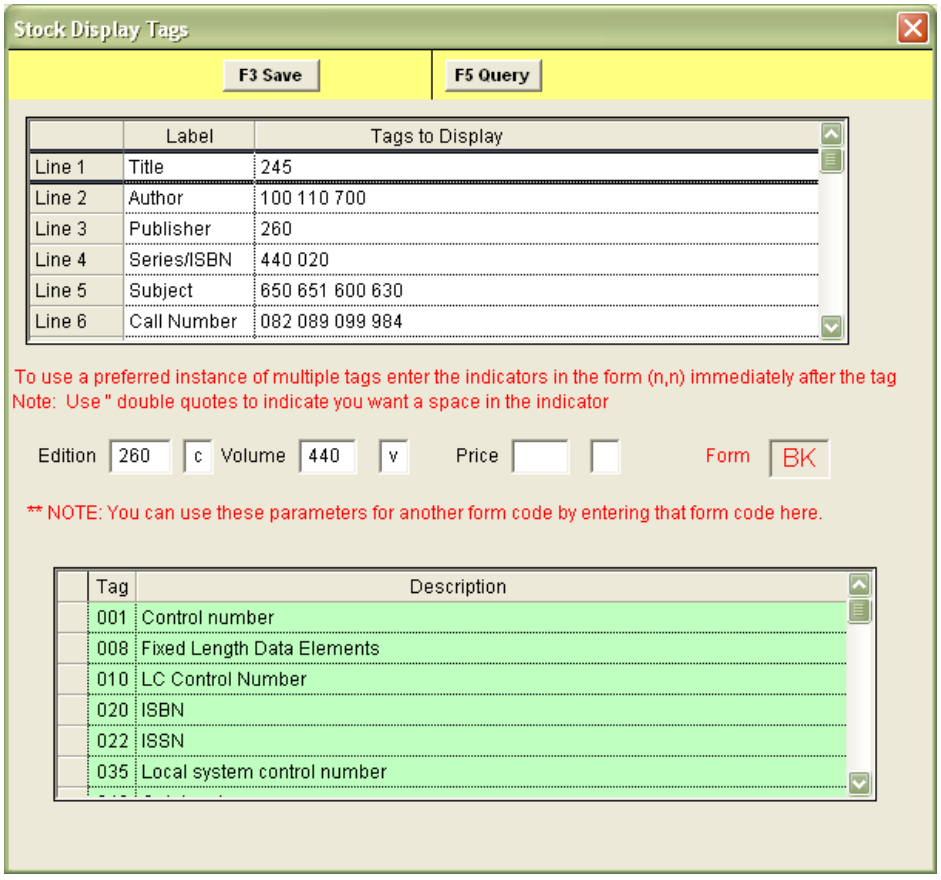
Stockitem Display

Determines which Tags from the Catalogue record will display in the Stockitem Display Lines.

1. Launch the *Amlib* client
2. Go to **Main** > **StockItems** > **StockitemForms** – the Form Codes screen will display:



3. Highlight a Form code in the table – for example: **BK - Books**
4. Click the **F9 Display** button – the Stock Display Tags screen will display:



SECTION 5: CATALOGUE MAINTENANCE

It is preferable to delete Catalogue records from the Stockitem, as this deletes the item and if the item is the last for the Catalogue gives an option to also delete the Catalogue record.

Single Deletions

Catalogue Records can be deleted using the **F4 Delete** button within the Catalog screen. You may not delete a record which has associated Stockitems. More commonly Catalogue records are deleted using the **F4 Delete** button with the Stockitem screen, which allows the operator to delete the item, as well as the Catalogue record if it is the last Stockitem associated with that catalogue record.

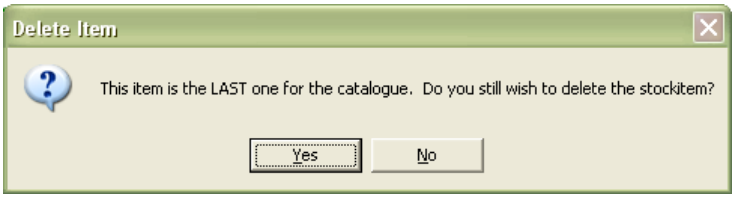
1. Launch the *Amlib* client
2. Go to **Main** > **StockItem** > **Stockitem** – the Stockitem screen will display
3. Initiate a **F5 Query** to locate the item to be deleted

4. Once the item is displayed, click the **F4 Delete** button
5. If there is more than one item attached to the catalogue record:
    a. A prompt with the following message will display:
    Delete this Stockitem. Are you sure?

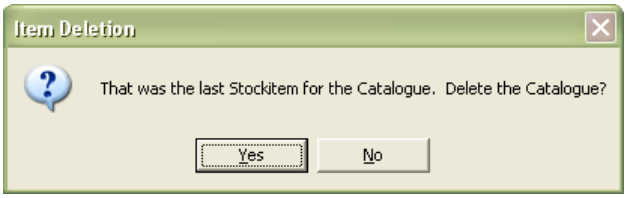
    b. Click the **Yes** button
    c. The item will be deleted

6. If there is only one item attached to the catalogue record:

    a. A prompt with the following message will display:
    This item is the LAST one for the catalogue. Do you still wish to delete the stockitem?



    b. Click the **Yes** button – the item will be deleted and another prompt with the following message will then display:
    That was the last Stockitem for the catalogue. Delete the Catalogue?



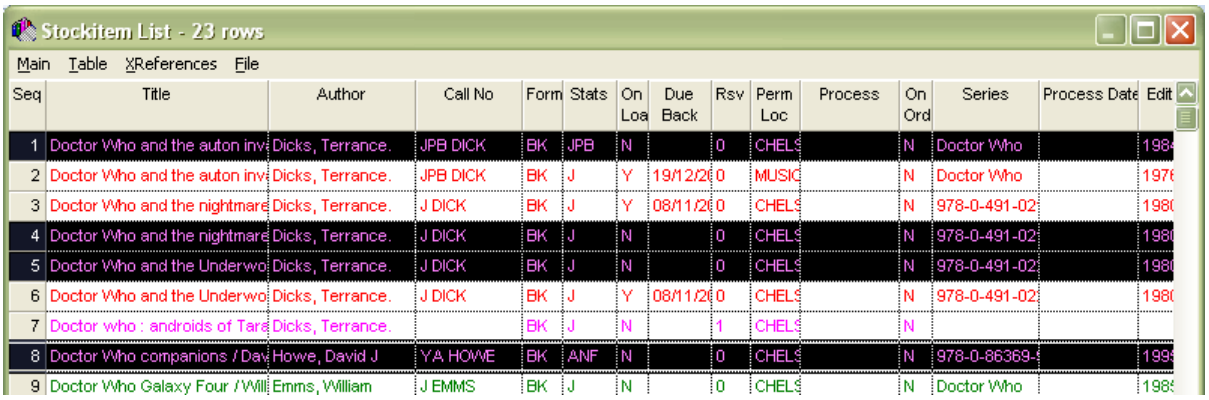
    c. Click the **Yes** button to delete the Catalogue record

Mass Deletions

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

Stockitem List

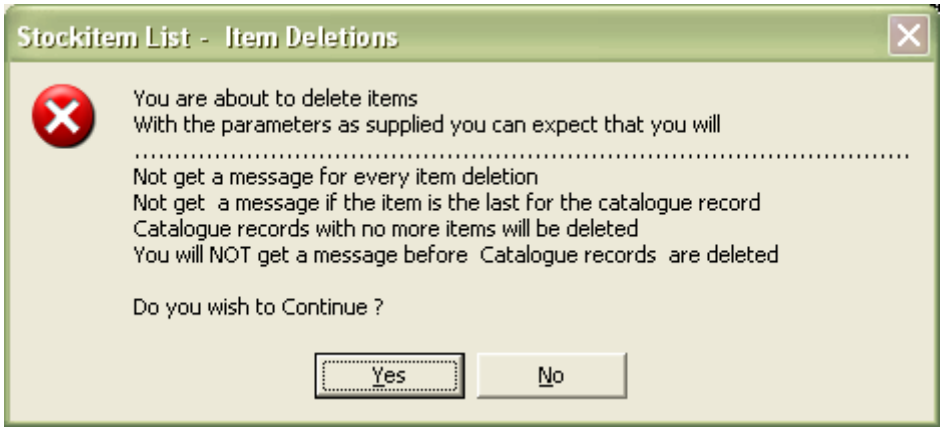
1. Launch the *Amlib* client
2. Go to **Main** > **StockItem** > **Stockitem** – the Stockitem screen will display
3. Initiate a **F5 Query** or Stockitem Where search to bring up a list of items to be deleted (alternatively, you may decide to use a Saved File as the basis of your deletions – select **File** > **Display File** > select a saved File > **F9 Select**)



4. Highlight the items to be deleted

5. From the Stockitem List main menu, select **Table** > **Mass Item Deletion** – the Mass Delete Items screen will display:

6. Add a **tick** in the Catalogue: Delete Catalogue if Last ? box
7. Click the **OK** button – the following prompt will appear:

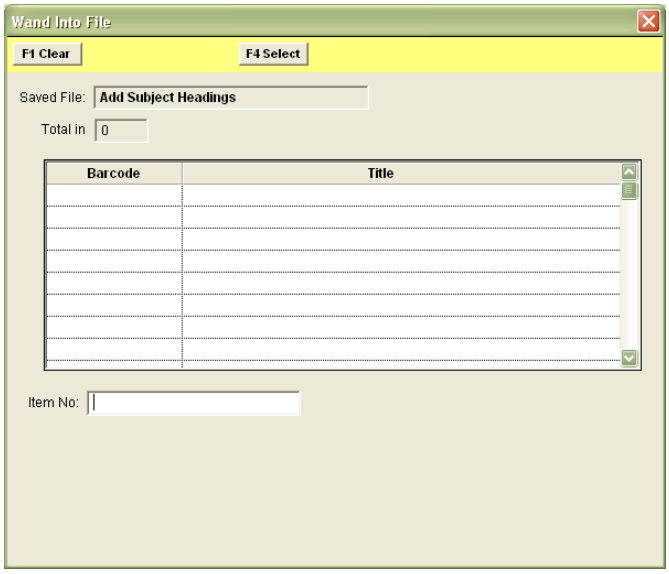


8. Click the **Yes** button
9. The items (and any associated Issue Catalogue records) will be deleted

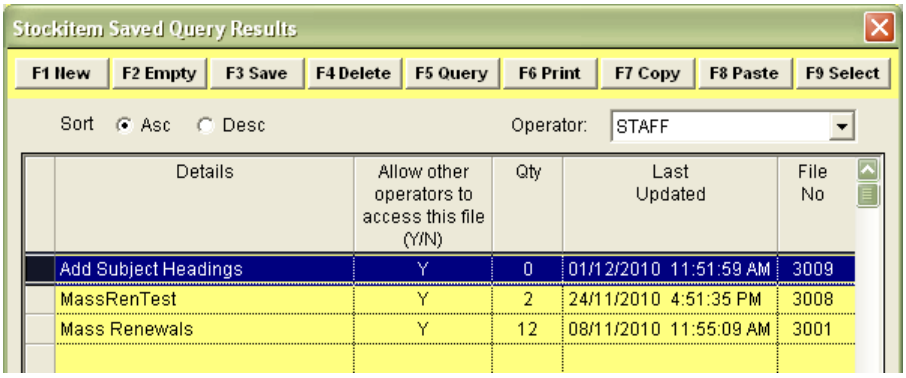
Wand Into File

1. Launch the *Amlib* client
2. Open the Stockitem module

3. Select **File** > **WandIntoFile** – the Wand Into File screen will display
4. Click the **F4 Select** button – the Stockitem Saved Query Results screen will display
5. Highlight an existing file, or click the **F1 New** button to add a new file (name it and then click the **F3 Save** button)
6. Saved File: = selected file (for example: **Add Subject Headings**)



7. Scan all items
8. Close out of Wand Into File window when complete
9. In Stockitem module, select **File** > **DisplayFile** – the Stockitem Saved Query Results screen will display:



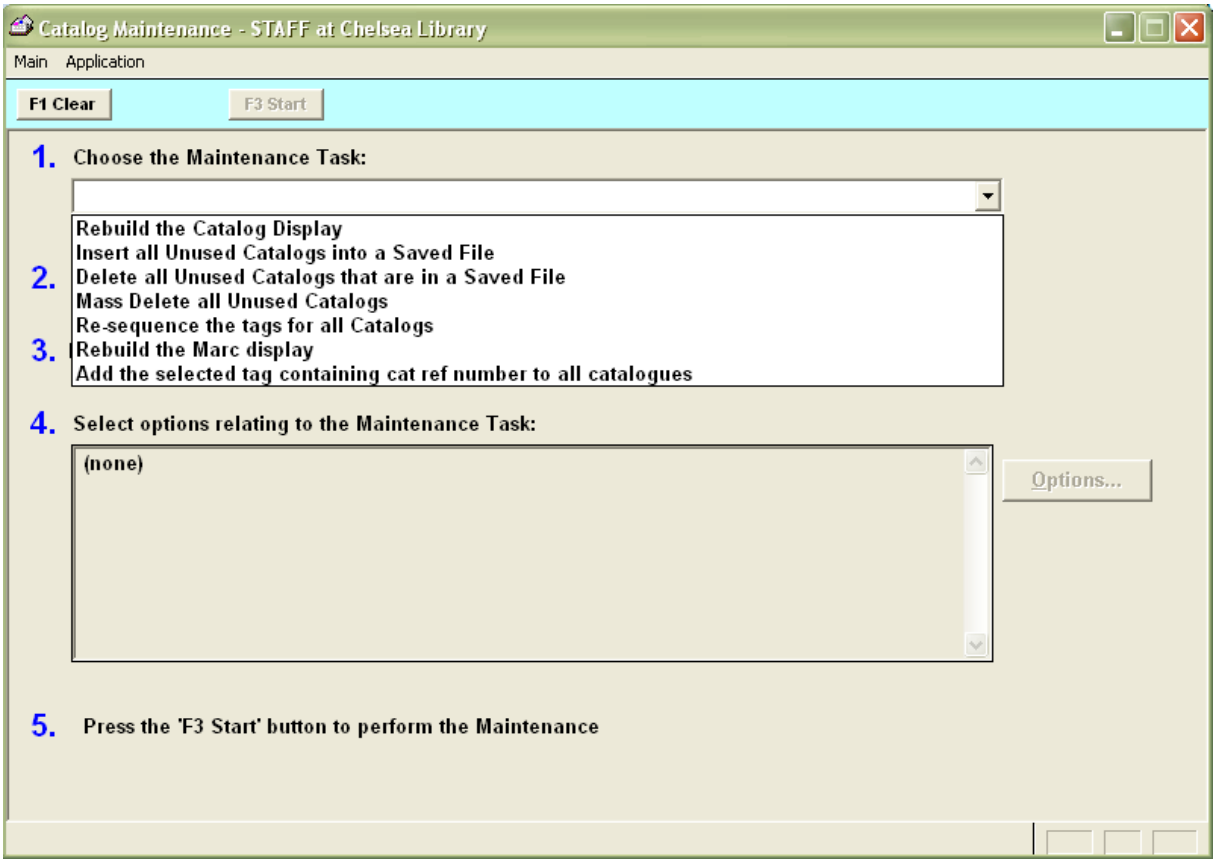
10. Highlight the saved file (for example: **Add Subject Headings**) and click the **F9 Select** button
11. Highlight all the items in the table
12. Select **XReferences** > **Catalogue**
13. This will bring up the table in the Catalogue module
14. Select **File** > **Save All**
15. Highlight an existing file, or click the **F1 New** button to add a new file (name it and then click the **F3 Save** button)

16. Click the **F9 Select** button

Catalogue Maintenance Facility

Catalog Maintenance is used for various tasks, including Mass Delete of Unused Catalogues.

1. Launch the *Amlib* client
2. Go to **Main** > **Catalogue** > **CatMaintenance** – the Catalog Maintenance screen will display:



Process each task in 5 steps:

1. Choose the Maintenance Task from the dropdown list
2. Insert Only consider catalogue records created before date (defaults to 1 year ago)
3. For Cat Ref insertion enter tag number here (if applicable – only for Task: **Add the selected tag containing cat ref number to all catalogues**)
4. Select Options relating to the Maintenance Task... using the **Options...** button
5. Click the **F3 Start** button to begin the process

OPTION	EXPLANATION	EXAMPLE
Rebuild the Catalog Display	If a catalogue parameter is altered for the Tags to be displayed in the brief Catalogue display at the top of the Catalog screen, this maintenance task will rebuild the display of all existing Catalogue records	If Line 4 changes from **099 082** to be **099 082 020**, the rebuild is needed to refresh existing items

	Carey, Peter, 1943- Oscar and Lucinda Melbourne : Australian Large Print, 1989 LP CARE	
Insert all Unused Catalogs into a Saved File	A file is created which contains all the Catalogue records that have no related Stockitem, Periodical or Order records. This enables the Catalogue records to be viewed before running the Mass Delete	File of Catalogues to be Deleted in the Mass Delete Maintenance Task
Delete Unused Catalogues that are in a Saved File	Only Catalogue records from a selected Saved File, and are not referenced by a Facility will be deleted without User Intervention.	A File has already been created that contains Catalogues to be mass deleted. Select this File when prompted
Mass Delete all Unused Catalogues (Purge)	All Catalogue records that are not referenced by a Stockitem, Periodical or Order records *will be deleted* without User intervention. If the Catalogue records are to be checked prior to running this, the Unused Catalogues can be inserted into a Saved File, using the first choice within this facility	Level of deletion of associated Authorities is set in **Main** > **Supervisor** > **Installation** > **Catalogue** tab – Catalogue deletion level parameter
Re-sequence the tags for all Catalogues	Refreshes the MARC display based on the Default Catalogue Show Sequence column on the Marc Tags Within The System screen (**Main** > **Authorities** > **MarcTags**)	Correct "Floating Tags" where the sequence has been corrupted. For example the Subject displays before ISBN
Rebuild MARC display	Refreshes the MARC display of Catalogue records based on the Used in Marc Display (Y/N) column on the Tag Subfields screen (**Main** > **Authorities** > **MarcTags** – **F7 SubF**). Can be **Y** or **N**.	If this column is changed this task must be performed for the changes to be seen when the catalogue record is displayed
Add the selected tag containing cat ref number to all catalogues	Add the Catalogue Reference Number to each Catalogue record. Mostly this will be used for adding the Catalogue Reference Number as the **035** Tag	Mainly used for integration with Libraries Australia batch deletion process – the need to export the **035** Tag to *Libraries Australia*

- See Appendix 6: Catalogue Maintenance Tasks for more information

Add an Authority to Catalogue Records in a File

It is possible to add an Authority – like a subject heading – to all the catalogue records in a file.

1: Create a **Saved File** of bibliographic records in the Catalogue module. One method to do this:

a) Launch the *Amlib* client

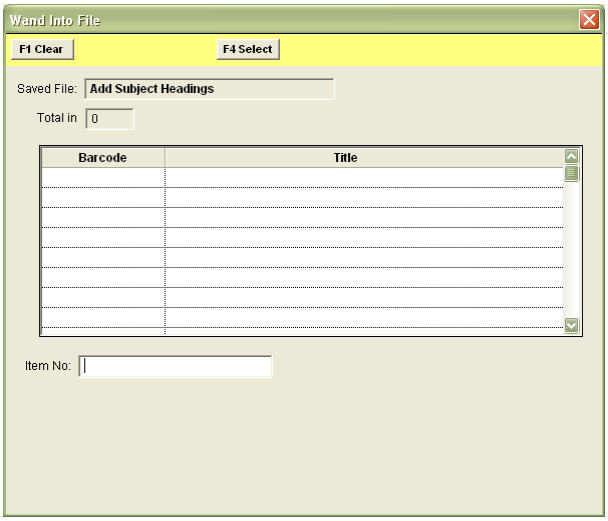
b) Open the Stockitem module

c) Select **File** > **WandIntoFile** – the Wand Into File screen will display

d) Click the **F4 Select** button – the Stockitem Saved Query Results screen will display

e) Highlight an existing file (or click the **F1 New** button to add a new file, name it and then click the **F3 Save** button) and click the **F9 Select** button

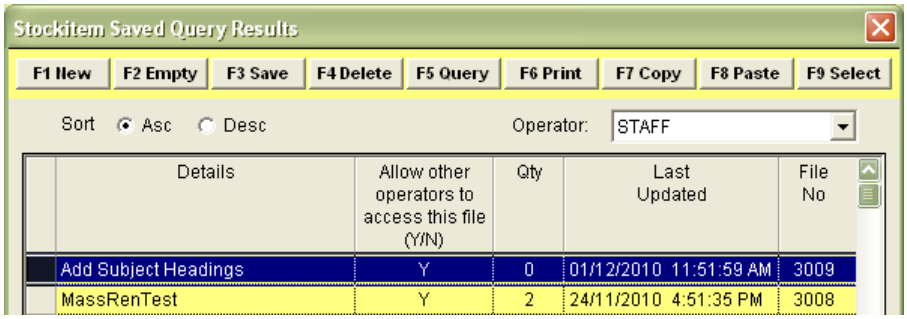
f) Saved File: = selected file (for example: **Add Subject Headings**)



g) Scan all items

h) Close out of Wand Into File screen when complete

i) In Stockitem screen menu, select **File** > **DisplayFile** – the Stockitem Saved Query Results screen will display:



j) Highlight the saved file (for example: **Add Subject Headings**) and click the **F9 Select** button

k) Highlight all the items in the table

l) Select **XReference** > **Catalogue** – this will bring up the table in the Catalogue List screen

m) Select **File** > **Save All** – the Catalogue Saved Query Results screen will display

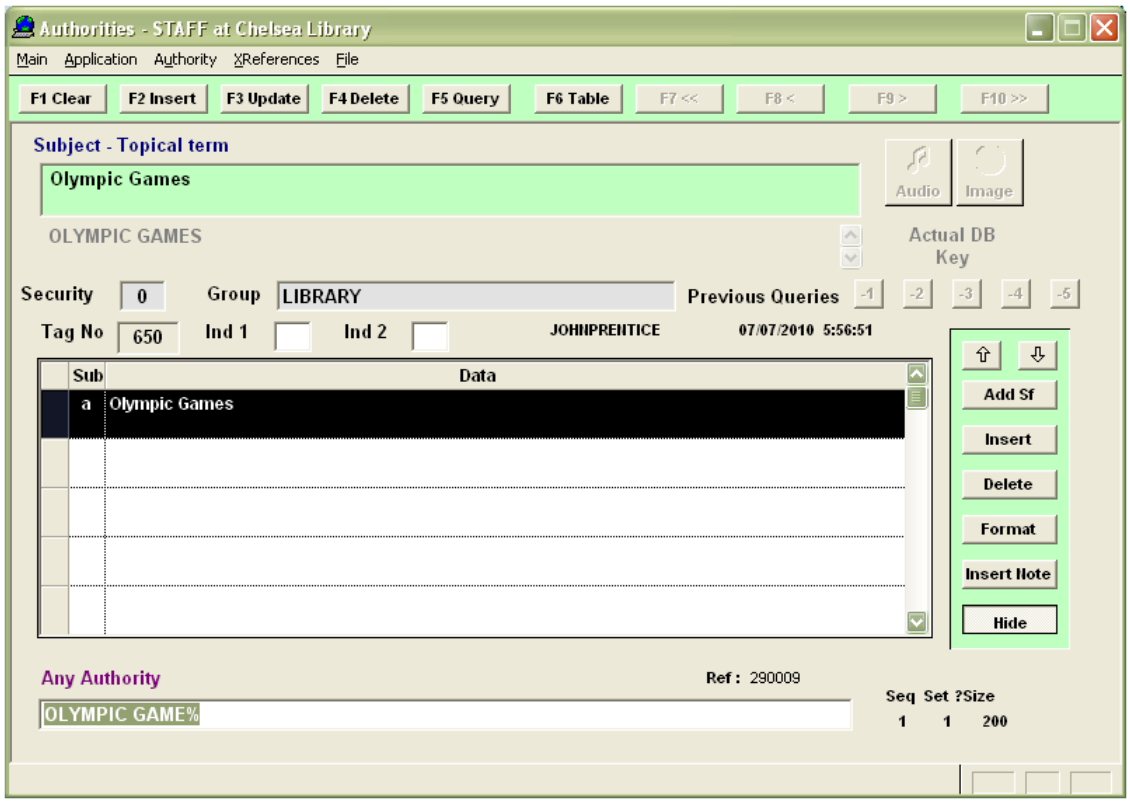
n) Highlight an existing file (or click the **F1 New** button to add a new file, name it and then click the **F3 Save** button) and click the **F9 Select** button

Ultimately, how you create the Catalogue File is really up to you.

2: Once you have the File, you then need to find the Authority to add. Go into the *Authorities* module, type in your search term and then click the **F5 Query** button

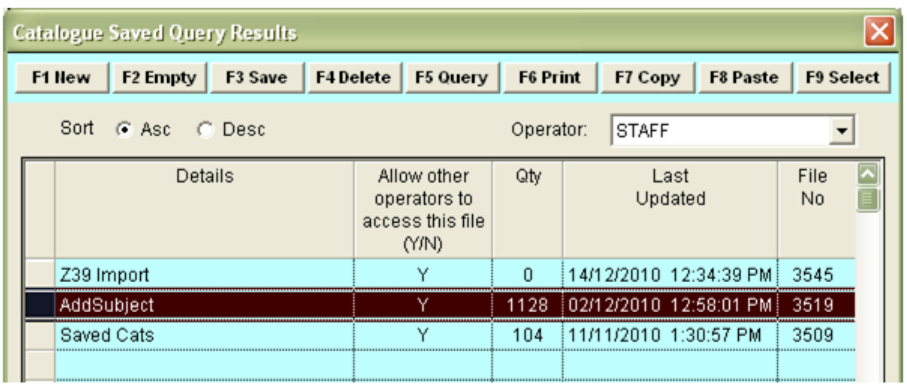
3: Select your term from the list

For example: you may want to add the subject **Olympic Games** to a number of bibliographic records (within the File).

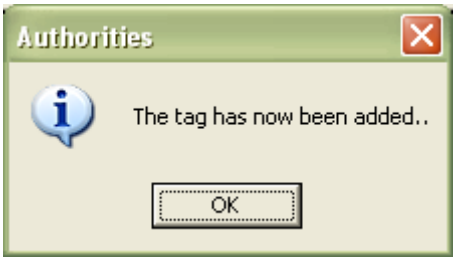


4: Once the Authority is showing in the Authority module, select **File** > **AddToCatsInFile** – the Catalogue Saved Query Results screen will display

5: Highlight the relevant file in the Catalogue Saved Query Results list



6: Click the **F9 Select** button – a prompt with the following message will appear: **The tag has now been added..**



7: Click the **OK** button when complete

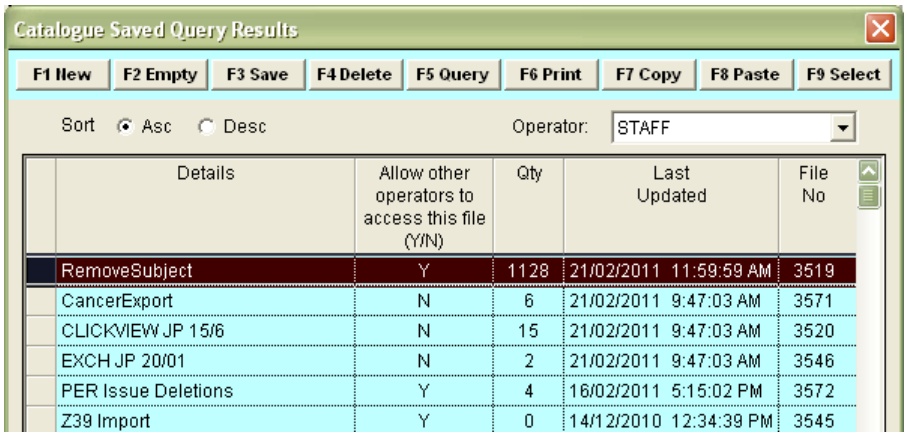
Remove from Cats in File

It is also possible to remove an authority, like a subject heading from a file of catalogue records in a similar way.

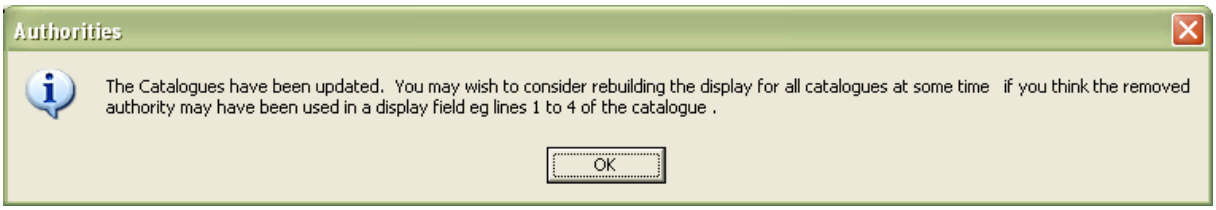
1: Find the Authority (for example: Subject) to remove

2: Once the Authority is displaying on the screen

3: Go to **File** > **RemoveFromCatsInFile** – the Catalogue Saved Query Results list will display:



4: Highlight the relevant file in the Catalogue Saved Query Results list and click the **F9 Select** button – a prompt with the following message will appear: **The Catalogues have been updated. You may wish to consider rebuilding the display for all catalogues at some time if you think the removed authority may have been used in a display field eg lines 1 to 4 of the catalogue .**



5: Click the **OK** button when complete

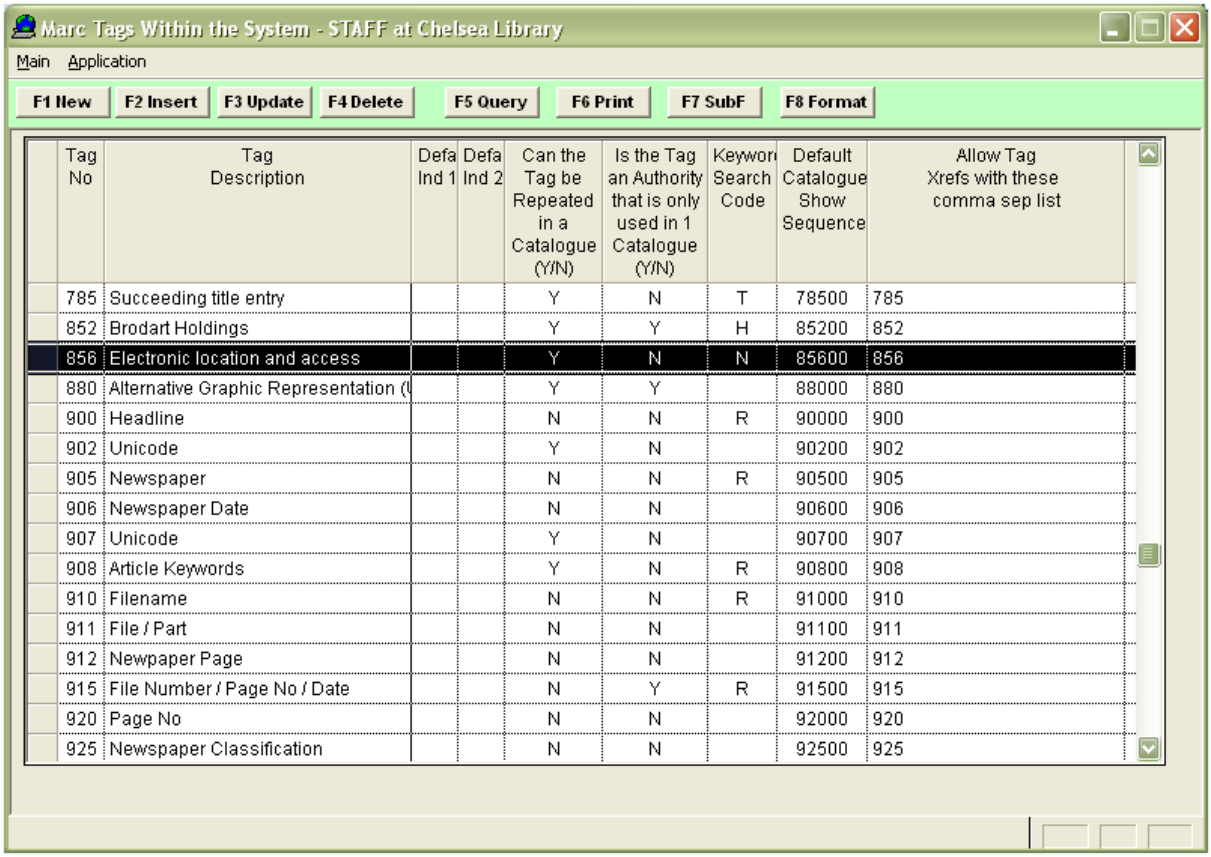
CATALOGUING URLS (UNIFORM RESOURCE LOCATORS)

The *SCISWeb* database now contains catalogue records for websites. Further details are at http://www.curriculum.edu.au/scis/productinfo/sciswebsites.htm . As these websites have either been reviewed by an agency such as CMIS Evaluation or the NSW *SCIS* team or are government sites containing useful information, the likelihood of them quickly disappearing into Cyberspace are less likely than merely creating links to sites yourself.

Authority Module

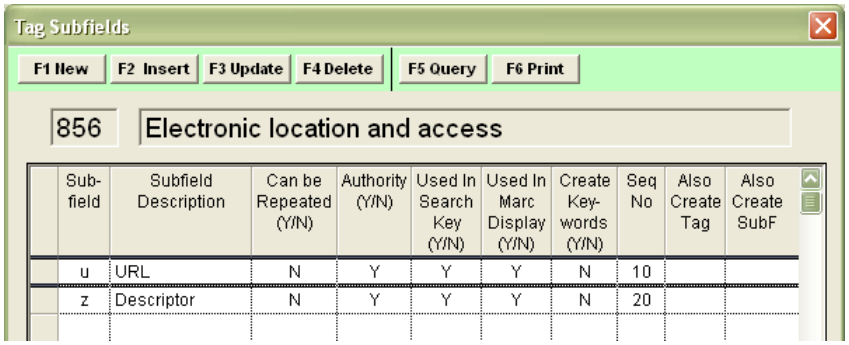
The URL tag has to be created in the Authority module, if it does not exist already. Once created it will be then available when creating catalogue items.

1. Launch the *Amlib* client
2. Go to **Main** > **Authorities** > **MarcTags** – the Marc Tags Within the System table will display:



Tag No	Tag Description	Defa Ind 1	Defa Ind 2	Can the Tag be Repeated in a Catalogue (Y/N)	Is the Tag an Authority that is only used in 1 Catalogue (Y/N)	Keywor Search Code	Default Catalogue Show Sequence	Allow Tag Xrefs with these comma sep list
785	Succeeding title entry			Y	N	T	78500	785
852	Brodart Holdings			Y	Y	H	85200	852
856	Electronic location and access			Y	N	N	85600	856
880	Alternative Graphic Representation (U			Y	Y		88000	880
900	Headline			N	N	R	90000	900
902	Unicode			Y	N		90200	902
905	Newspaper			N	N	R	90500	905
906	Newspaper Date			N	N		90600	906
907	Unicode			Y	N		90700	907
908	Article Keywords			Y	N	R	90800	908
910	Filename			N	N	R	91000	910
911	File / Part			N	N		91100	911
912	Newpaper Page			N	N		91200	912
915	File Number / Page No / Date			N	Y	R	91500	915
920	Page No			N	N		92000	920
925	Newspaper Classification			N	N		92500	925

3. If no **856** Tag exists, then click the **F1 New** or **F2 Insert** button
4. Create a Tag with the following details:
    a. Tag No = **856**
    b. Tag Description = **Electronic location and access**
    c. Can the tag be repeated in a Catalogue (Y/N) = **Y**
    d. Is the Tag an Authority that is only used in 1 Catalogue (Y/N) = **N**
5. Click the **F3 Update** button to save the new tag
6. Highlight the new **856** field and click the **F7 SubF** button – the Tag Subfields table will display:



7. The tag should have 2 subfields set as follows:

Sub-field	Subfield Description	Can be Repeated (Y/N)	Authority (Y/N)	Used in Search Key (Y/N)	Used in Marc Display (Y/N)	Create Key-words (Y/N)	Seq No
u	URL	N	Y	Y	Y	N	10
z	Descriptor	N	Y	Y	Y	N	20

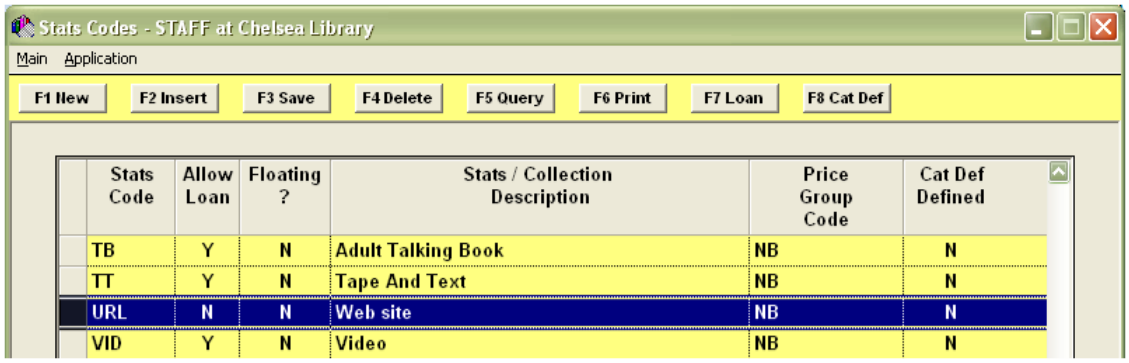
8. Click the **F3 Update** button when complete

Stockitem Module

1. Launch the *Amlib* client
2. Go to **Main** > **StockItems** > **StockitemStatsCodes** – the Stats Code table will display:
3. Click the **F1 New** or **F2 Insert** button to create a new entry
4. Set up a code with the following parameters:

   - Stats Code = **URL**
   - Allow Loan = **N**
   - Floating = **N**
   - Stats / Collection Description = **Web site**
   - Price Group Code = as per the other Stats codes on your list

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

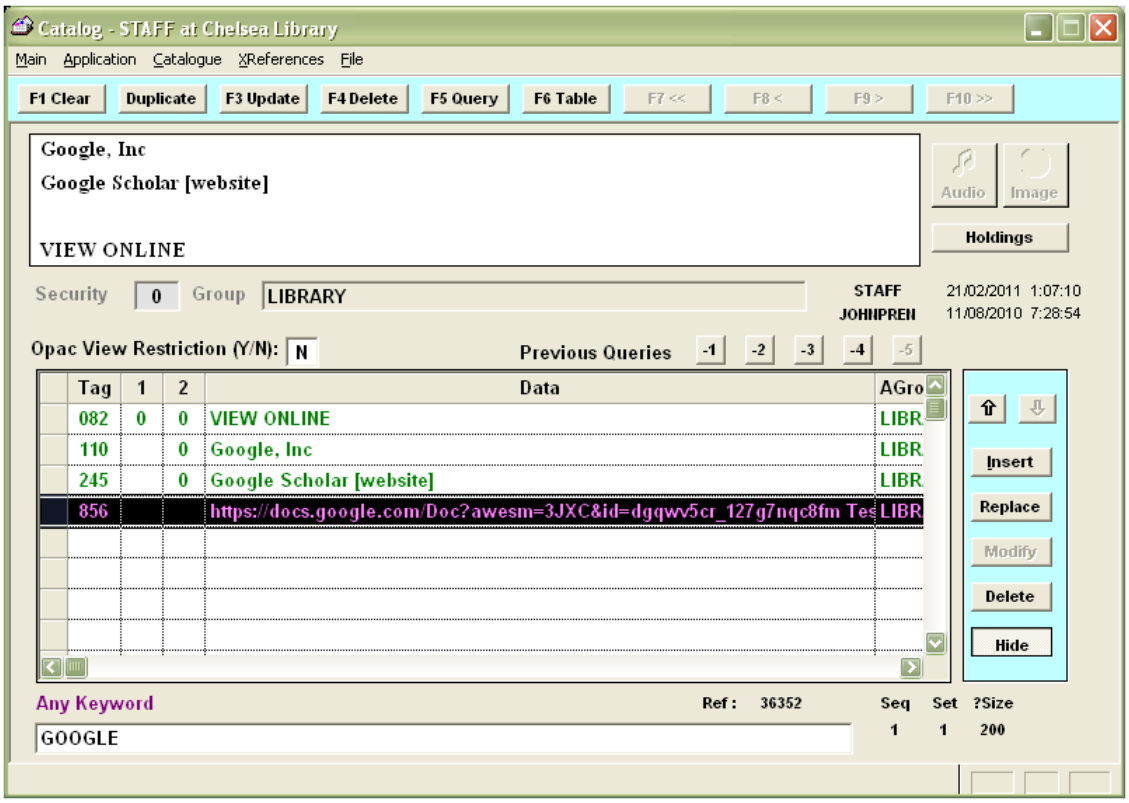


Please Note: You could set up a specific Stockitem Form code (for example: **WEB**) if you wish, or choose Computer Software if required.

Catalogue

If required, you could set up a Lead through set for URLs. Create the catalogue as desired e.g. using Worksheet, No Lead Thru etc., adding the URL into the **856** tag and adding the Title of the URL into the **245** tag.

HINT: You could type **website** in square brackets after the Title if you wish – for example: **Google Scholar [website]**

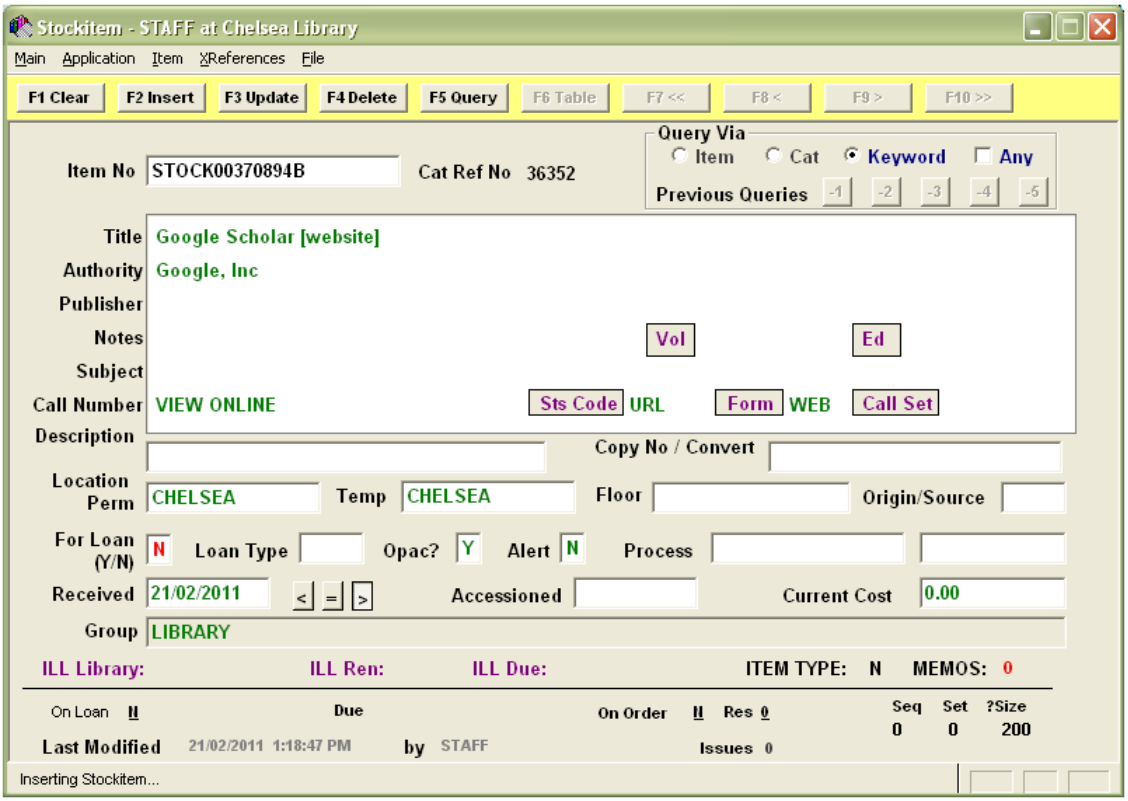


Even though a URL will never be circulated, it will be necessary to create a Stockitem so that the item will be seen in *NetOpacs*.

1. With record displayed in the Catalog screen, click the **Holdings** button – a prompt with the following message will display: **No Stockitems exist for the Catalogue. Do you wish to create a New Item?**
2. Click on the **Yes** button – a New Stockitem prompt will display with the following message: **Please choose a Form Type for the new Stockitem**
3. Choose **WEB** and click on the **OK** button – the main Stockitem screen will display and enter creation mode (the **F2 Insert** button will appear bolded) and a number of fields will be pre-populated
4. Complete the other fields as required – for example: St(at)s Code, Current Cost, Floor location, etc – to access a list of codes in a field enter **.<Tab>**

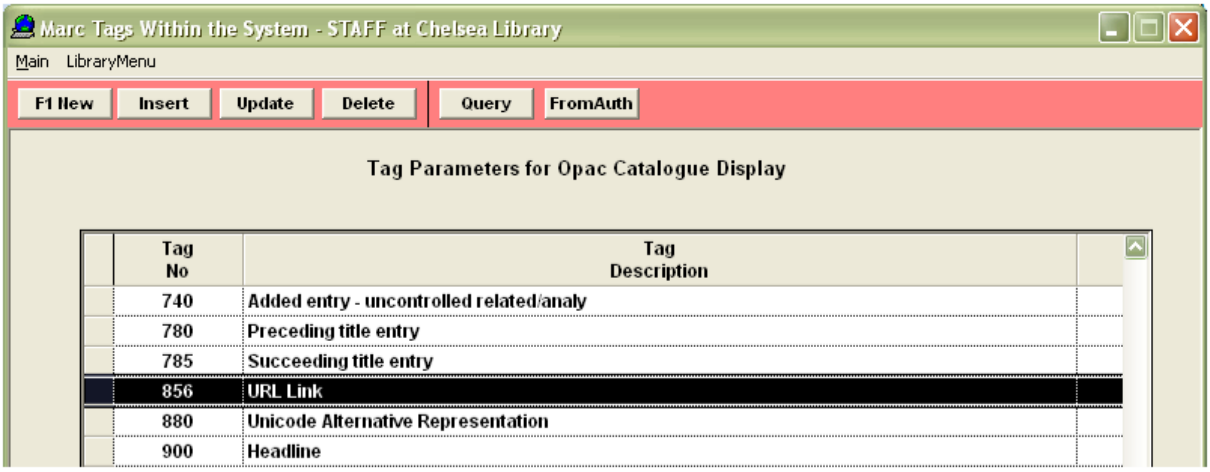
   For example: in the Sts (Stats) Code field, entering full stop (**.**) and pressing the **<Tab>** key will display a list of your Stats Codes and Descriptions – double-click on URL to select it
5. Leave the Item No field **blank**
6. Click on the **F2 Insert** button when complete – the following prompt will display: **Do you want the system to supply a barcode?**

7. Click the **Yes** button – the following prompt will display: **The Item has been Inserted.**
8. Click on the **OK** button when complete



Supervisor

1. Launch the *Amlib* client
2. Go to **Main** > **Supervisor** > **Supervisor** – the Locations table will display
3. From the menu select **LibraryMenu** > **Opacs** > **OpacDisplayTags** – the Marc Tags Within the System: Tag Parameters for Opac Catalogue Display screen will display:



4. Ensure that Tag **856** is available
5. If it isn't, click either the **F1 New** or **Insert** button to create a new entry with the following details:

a. Tag No = **856**

b. Tag Description = **URL Link**

6. Click the **Update** button to save any changes
7. The *NetOpacs* Web Console or service manager will then need to be restarted

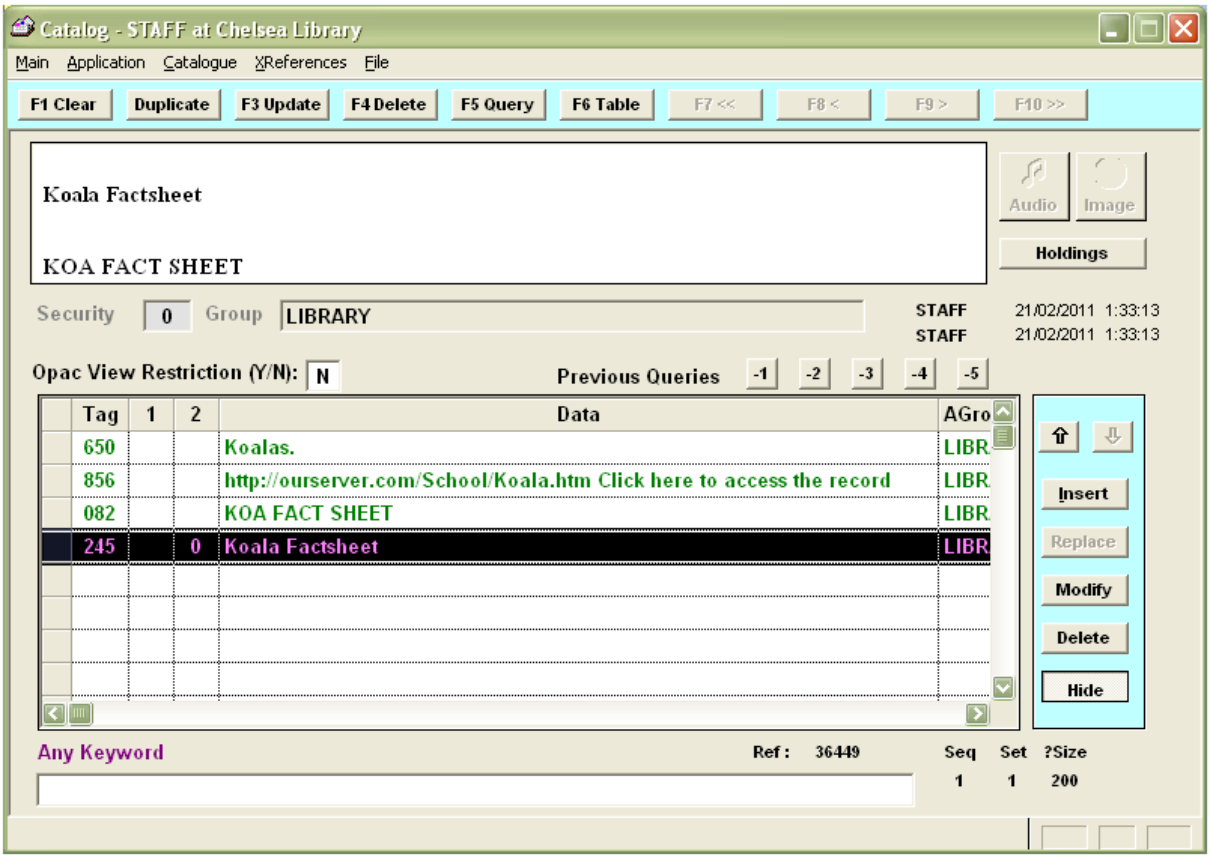
If a URL has been catalogued it will pop up in the *NetOpacs* screen and the user can just click on the hyperlink and get directly to the Website.

Please Note: Now that you have catalogued your URLs, they would need to be checked occasionally. To get a listing of the URLs on your database, in the main Stockitem screen, type the Form code: **URL** and select the **F5 Query** button

Documents

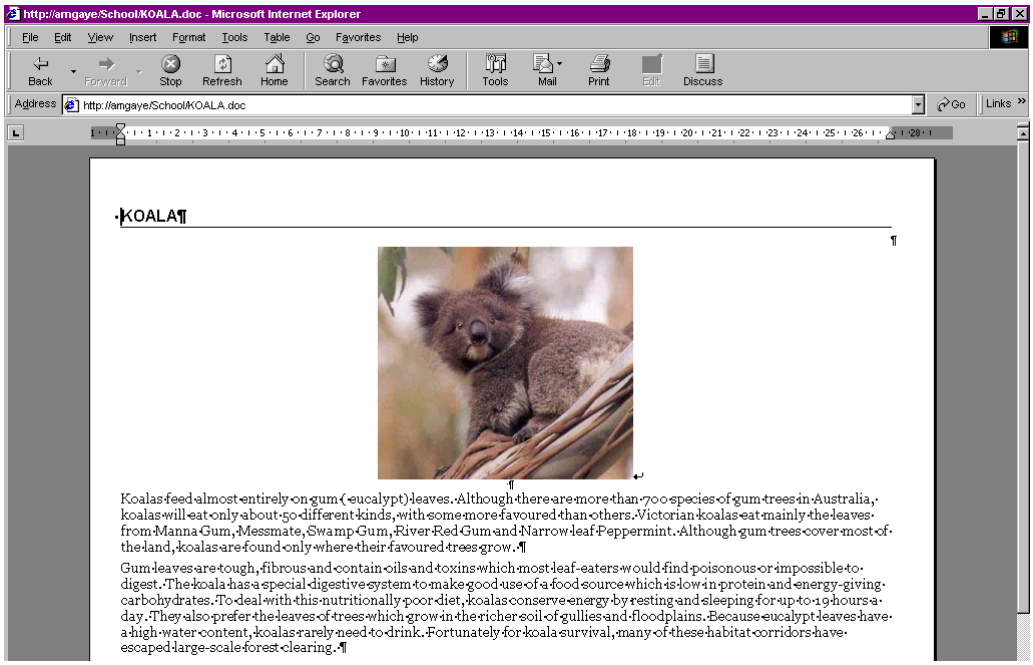
Links to documents can be catalogued in a similar way to URLs (see above).

1. Create a catalogue record with an **856 | URL** link to the document



2. In the Search screen, the Catalogue display points to the path of the document (the source of the document would have to be on a folder that is Web-shared across the network)

3. On clicking the hyperlink, the document is displayed:

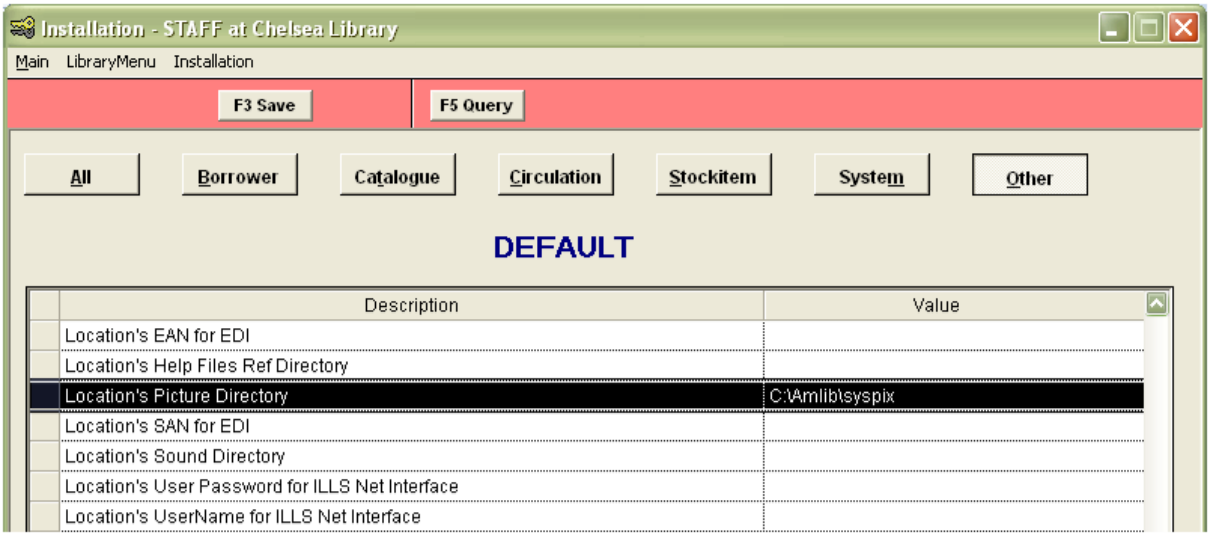


4. With the documents, it would still be an HTTP file, and the path would be http://servername

Please Note: We suggest that the documents to be viewed are saved to the *NetOpacs* server, as then it doesn't have to break through firewalls, etc. to get to view the document. In the **NetOpacs** folder there is an **amlibweb** folder - you could create a new folder in there called **docs** or similar. The path then would be http://servername/amlibweb/docs/koala.htm or whatever you saved it as. It is quite easy in Word to save as an htm file. You may have to get special permissions on the Network to save to that directory (for example: **amlibweb**) - if you save it to the **C:** drive, if someone else is looking for the document, the computer will be searching on the **C:** drive of their particular machine. It needs to be a path that everyone can see.

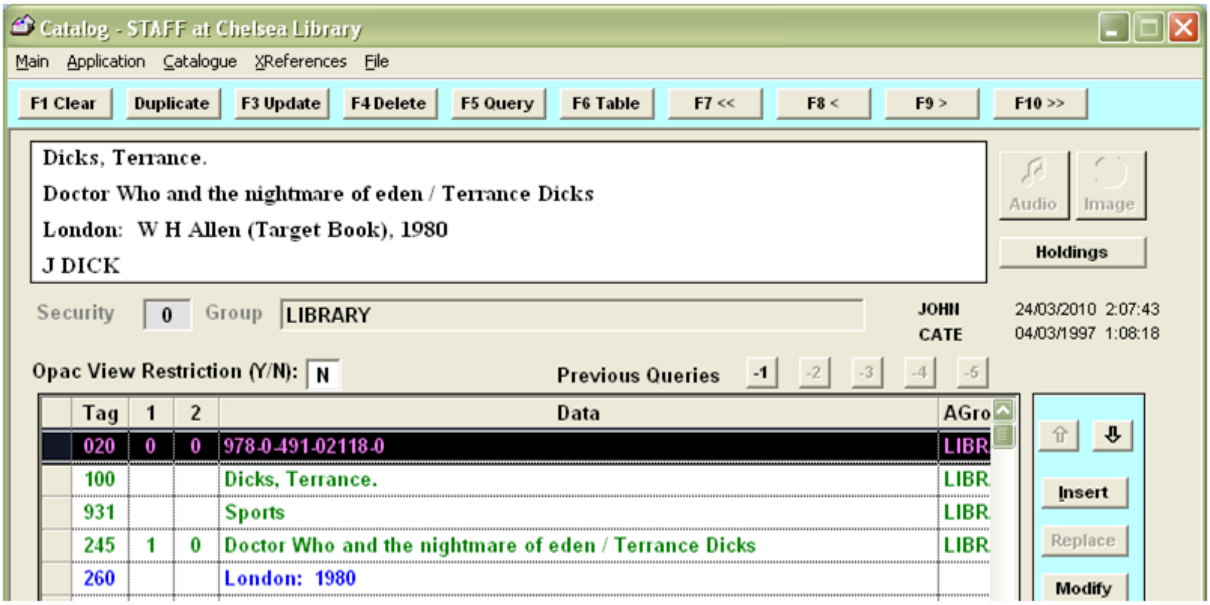
IMAGES

Images can be attached to Catalogue records for Local History, Art Collections, School Archives, Current events etc. You will need to check that the Location's Picture Directory exists as a path in **Main** > **Supervisor** > **Installation** – Other tab (also configurable by individual Location). This would need to be a shared folder which could be seen by both the *Amlib* clients and the *NetOpacs*.



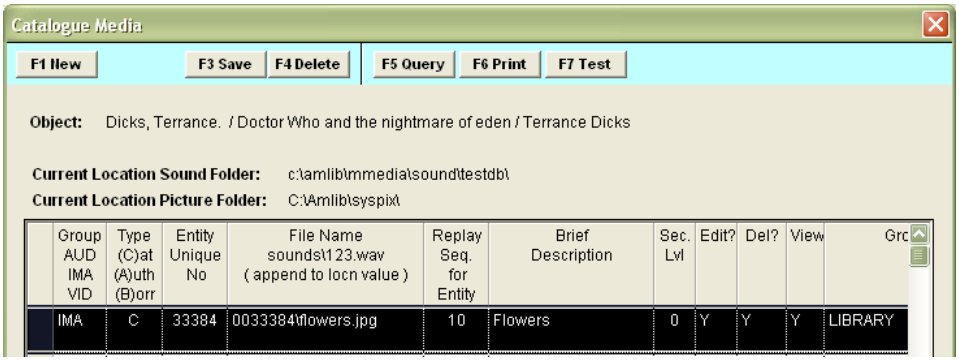
JPEGs would be best for ease of use, simplicity, and the fact that they could be viewed without needing viewing software.

1. Launch the *Amlib* client
2. Go to **Main** > **Catalogue** > **Catalogue** – the Catalog screen will display
3. Initiate a **F5 Query** search to locate the record to which you wish to attach an image

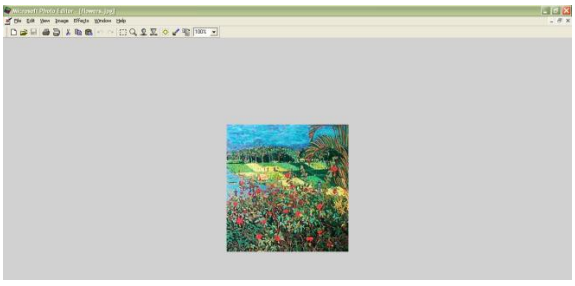


4. From the menu, select **Catalogue** > **Picture Sounds** – the Catalogue Media screen will display
5. Click the **F1 New** button – and navigate to the source of the image

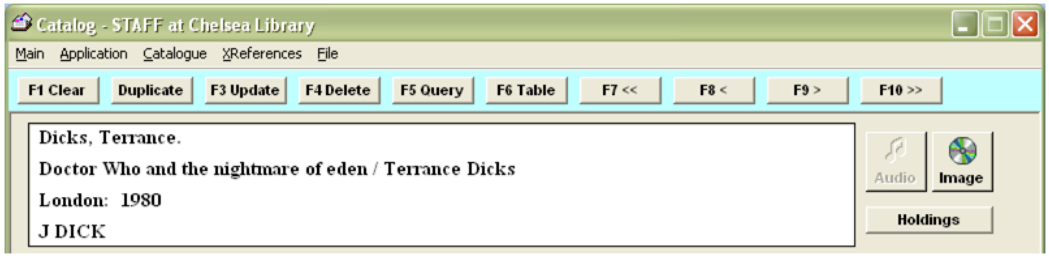
6. Select the image (for example: **flowers.jpg**) and click the **Open** button
7. Enter the following details:
    a. Brief Description
    b. Replay Seq. for Entity – for example: **10** (if there are multiple images attached to a single Catalogue record, should be sequenced: **10**, **20**, **30**, etc)



8. Click the **F3 Save** button when complete
9. Select the **F7 Test** button to preview the image



- The **Image** button in the Catalog screen will be active if there is an image associated with the Catalogue record

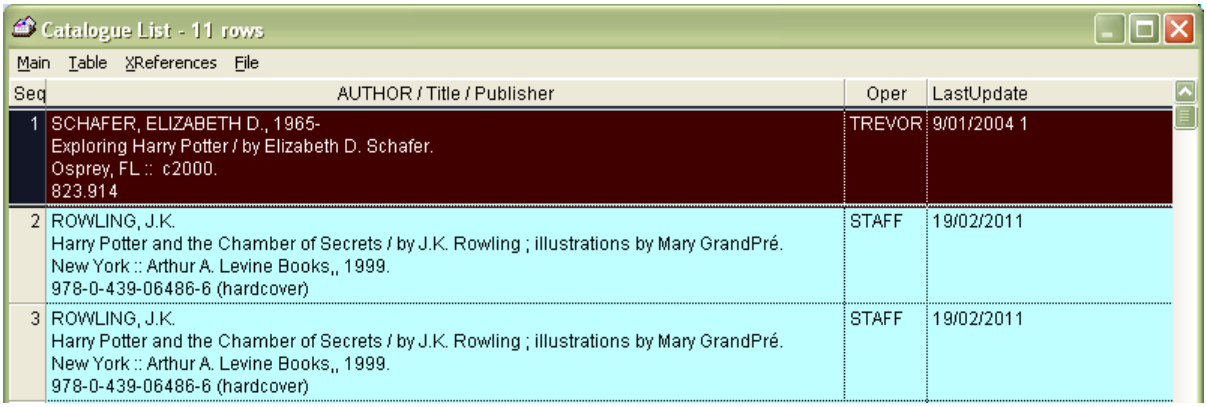


- The image can be viewed in *NetOpacs* or *OPACS* if set up correctly

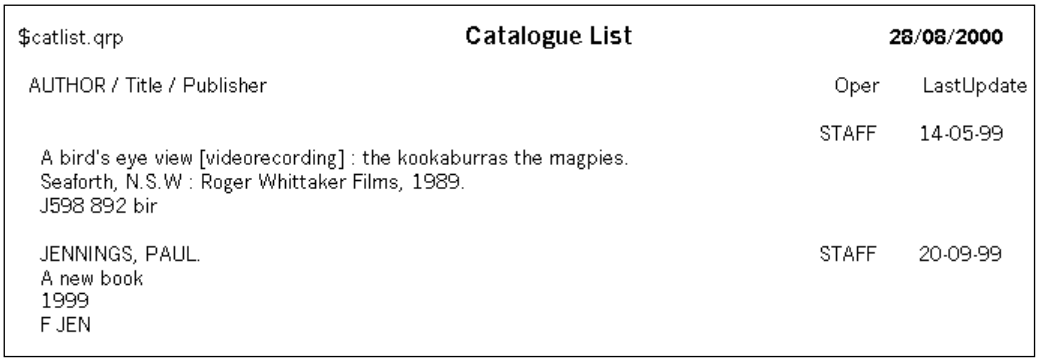
SECTION 6: REPORTS

Catalogue Module

1. Launch the *Amlib* client
2. Go to **Main** > **Catalogue** > **Catalogue**– the Catalog screen will display
3. Initiate a **F5 Query** search – the results will display in the Catalogue List screen:

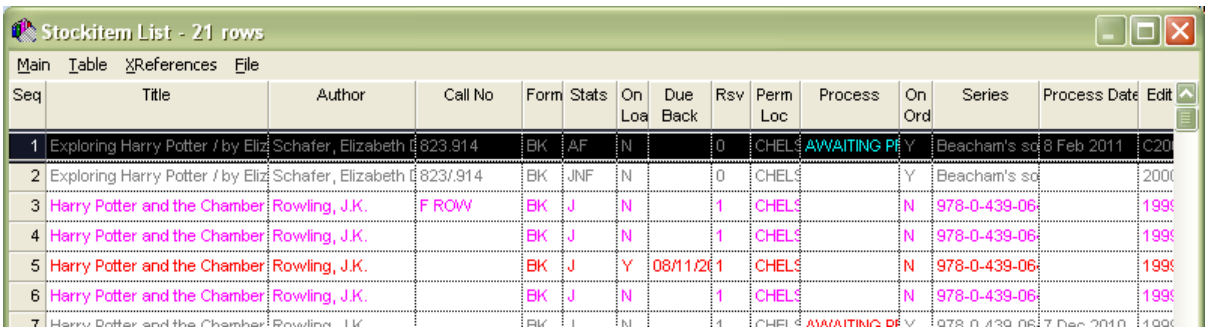


4. From the menu, select **Table** > **Report** – the list will display in print view:



You are able to use the list to create a Stockitem report:

1. Highlight the Catalogue items
2. From the menu, select **XReferences** > **StockItems** – the results will display in a Stockitem List

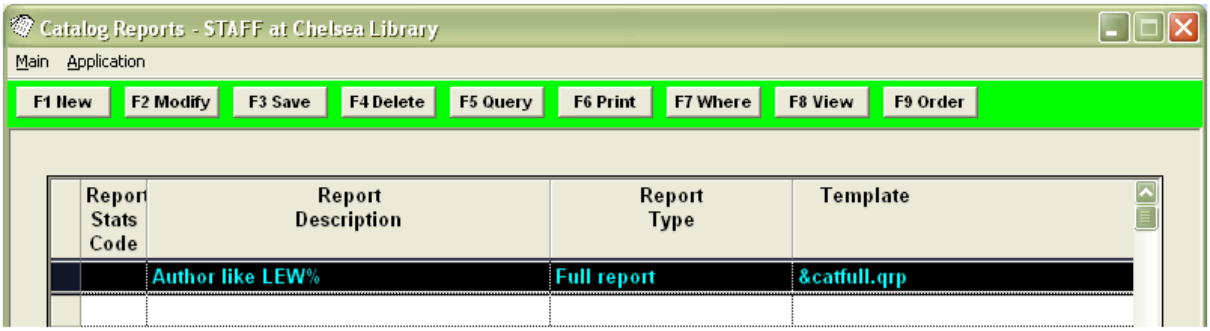


3. Again highlight the Stockitem to be included in the report
4. From the main menu, select **Table** > **Report** – the list will open in print view

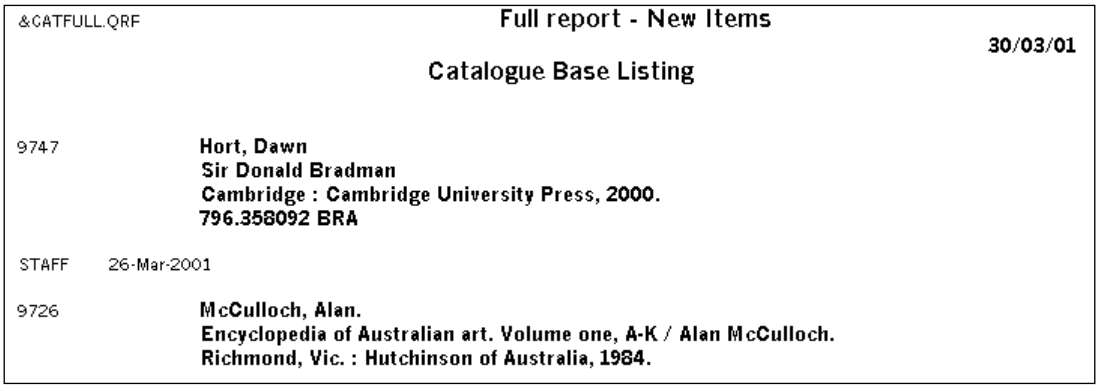
Reports Module

RepCatalogue

1. Launch the *Amlib* client
2. Go to **Main** > **Reports** > **RepCatalogue**– the Bibliographic Reports screen will display:

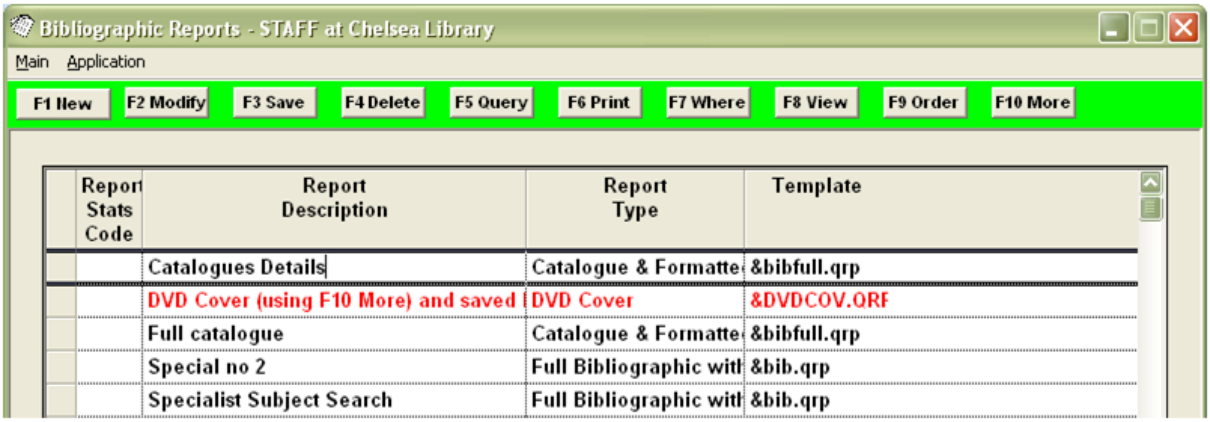


- **&CATFULL.QRP**



RepBibliographic

1. Launch the *Amlib* client
2. Go to **Main** > **Reports** > **RepBibliographic** – the Bibliographic Reports screen will display:



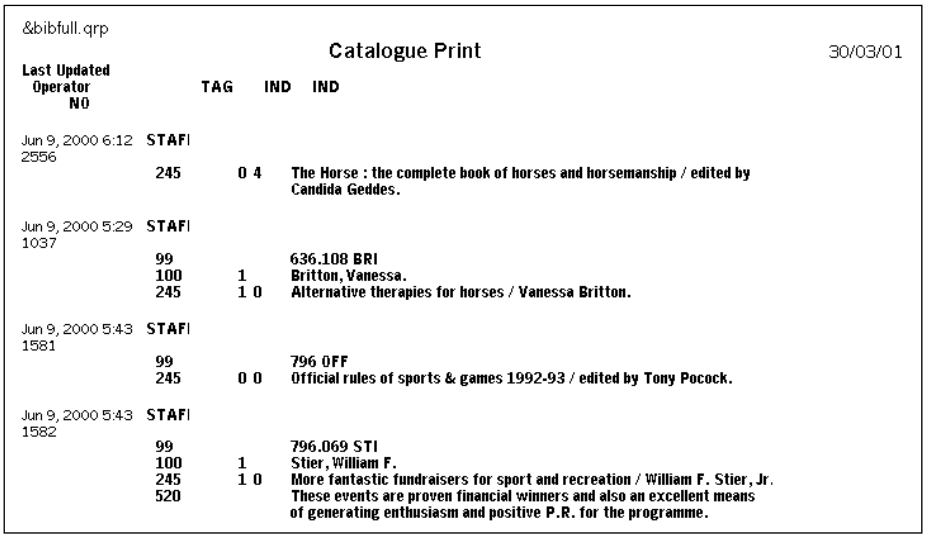
Below is table containing a list of the available reports that can be set up in RepBibliographic:

TEMPLATE	DESCRIPTION	REPORT TYPE
&BIB.QRP	Full Bibliographic without TAG Numbers	**Bibliographic (Default)**
&BIB2.QRP	Full Bibliographic without TAG Numbers (in 2 columns)	**Bibliographic (Default)**
&BIBCSV.QRP	Bibliographic Export	**Fixed layout Reports**
&BIBFULL.QRP	List of catalogue records with full bibliographic details	**Bibliographic (Default)**
&BIB2431.QRP	Full list of bibliographic details	**Use &BIBFULL.QRP**
&BIB2432.QRP	Summary of bibliographic details	**Use &BIBFULL.QRP**
&BIBFIXD.QRP	Fixed Layout Catalogue Print	**Fixed layout Reports**
&BIBFL10.QRP	Fixed Layout 10 fields	**Fixed layout Reports**
&BIBFL28.QRP	Fixed Layout 2 columns 8 fields	**Fixed layout Reports**
&CTITEMX.QRP	Fixed Layout with Image	**Bib with Image + stock**
&DVDCOV.QRP	DVD Cover	**Fixed layout Reports**
&VIDCOV.QRP	Video Cover	**Fixed layout Reports**

Where Search

1. Select the report from the list and click on the **F7 Where** button – the Reports – Where screen will open
2. There are three unique parameters:
    - **Auth Tag**: Search for a particular MARC tag
    - **Auth Key**: Check for particular data contained in the MARC tag
    - **Tags to Display**: MARC tags to display in report
3. The statement can include the following settings:
    a. Auth Tag – for example: **Auth Tag = 245** (Title)
    b. Auth Key – for example: **Auth Key LIKE Harry Potter** (looks for all matching items where the Title BEGINS with **Harry Potter**)
    c. Tags to Display – for example: **Tags to Display IN 100, 245** (will display Author and Title in report)
    d. (Optional) Enter a start date: **Date >=** enter a date in DD/MM/YYYY format – for example: **01/01/2010**
    e. (Optional) Enter a finish date: **Date <=** enter a date in DD/MM/YYYY format – for example: **10/10/2010** (a finish date is optional – if not inserted, the report will go up to the current date).
    f. You may also want to limit by **Catalogue Number**(s)
4. Click the **F3 Save** button when complete

- **&BIBFULL.QRP** – Displays the Tag Numbers for each Tag

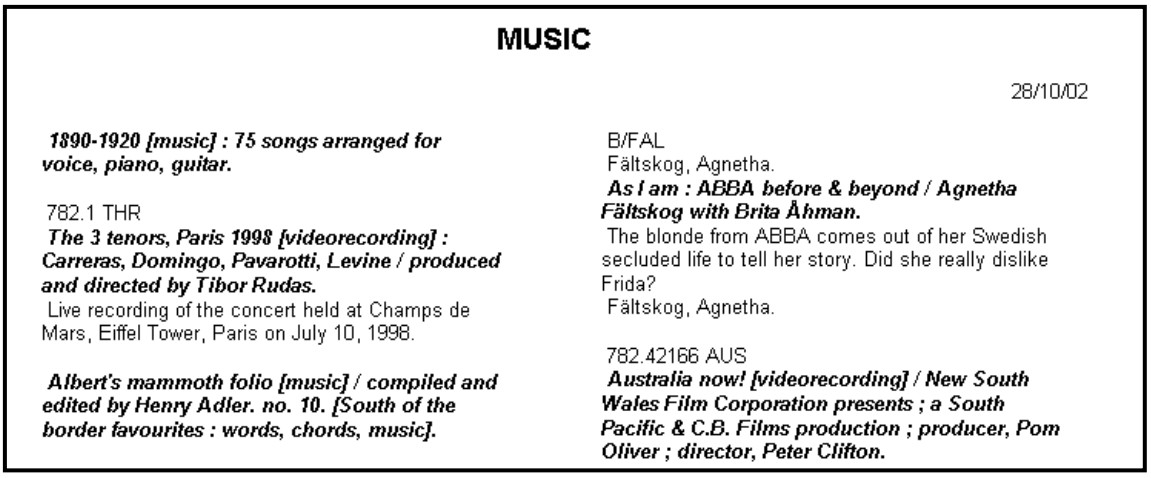


&bibfull.qrp

Catalogue Print 30/03/01

Last Updated Operator NO	TAG	IND	IND	
Jun 9, 2000 6:12 2556	STAFI			
	245	0	4	The Horse : the complete book of horses and horsemanship / edited by Candida Geddes.
Jun 9, 2000 5:29 1037	STAFI			
	99			636.108 BRI
	100	1		Britton, Vanessa.
	245	1	0	Alternative therapies for horses / Vanessa Britton.
Jun 9, 2000 5:43 1581	STAFI			
	99			796 OFF
	245	0	0	Official rules of sports & games 1992-93 / edited by Tony Pocock.
Jun 9, 2000 5:43 1582	STAFI			
	99			796.069 STI
	100	1		Stier, William F.
	245	1	0	More fantastic fundraisers for sport and recreation / William F. Stier, Jr.
	520			These events are proven financial winners and also an excellent means of generating enthusiasm and positive P.R. for the programme.

- **&BIB.QRP -** Create a File within Catalogue and view this file for the report
- **&BIB2.QRP** – Bibliography with 2 columns



MUSIC

28/10/02

1890-1920 [music] : 75 songs arranged for voice, piano, guitar.

782.1 THR
The 3 tenors, Paris 1998 [videorecording] : Carreras, Domingo, Pavarotti, Levine / produced and directed by Tibor Rudas.
Live recording of the concert held at Champs de Mars, Eiffel Tower, Paris on July 10, 1998.

Albert's mammoth folio [music] / compiled and edited by Henry Adler. no. 10. [South of the border favourites : words, chords, music].

B/FAL
Fältskog, Agnetha.
As I am : ABBA before & beyond / Agnetha Fältskog with Brita Åhman.
The blonde from ABBA comes out of her Swedish secluded life to tell her story. Did she really dislike Frida?
Fältskog, Agnetha.

782.42166 AUS
Australia now! [videorecording] / New South Wales Film Corporation presents ; a South Pacific & C.B. Films production ; producer, Pom Oliver ; director, Peter Clifton.

Sorting of these Bibliographic reports is different to normal reports. The Tag that you wish to sort by is set in the Where Parameters – for example: **245 | Title** and the Order is set to be Order Key. Once this is set, you must remember to say Yes to the File message when it comes up as it will no longer list the Files once the Tag is set as one of the Where parameters.

Fixed Layout Reports

The **F10 More** function is used for mapping data to fields in Fixed Layout reports – for example: the DVD Cover template (**&DVDCOV.QRP**).

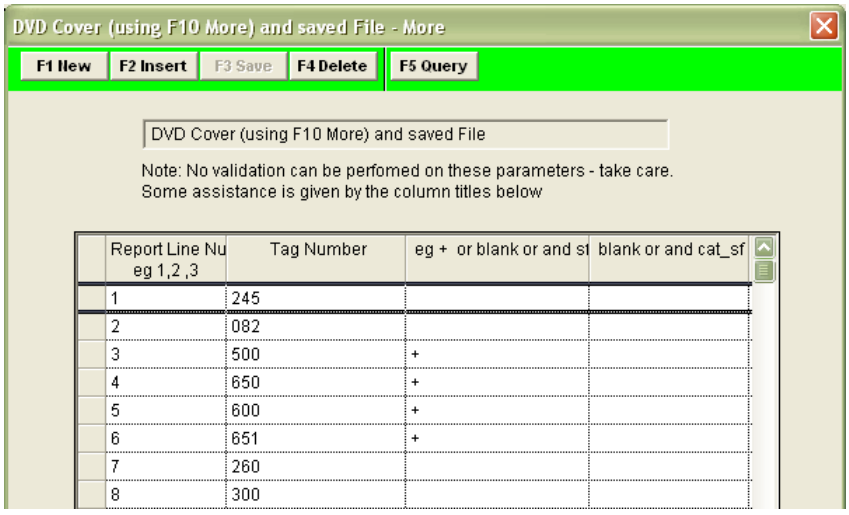
Each row of this table may be used to collect 1 of the 20 fields on the report template. These first 20 fields contain Tag or Subfield data (**Fields 1-20**), and the next 20 fields (**Fields 1A – 20A**) contain the associated Tag Descriptions (Go to **Main** > **Authorities** > **MarcTags** to see a complete list of Tag Nos and Tag Descriptions). The report outputs all the MARC data to the report. The inclusion of **Fields 1A – 20A** in the report is optional.

	COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5
HEADING	Report Line	Tag Number	eg **+** or **blank**	**blank** or **and**	Not used

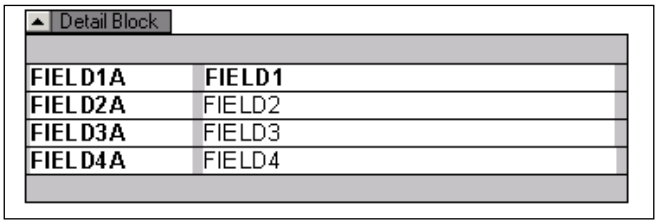
	Number		or **and sf in ('a', 'b')**	**cat_sf in ('a', 'b')**	
EXAMPLE	**1**	**100**			
	2	**245**			
	3	**082**			
	4	**650**			
COMMENT	Can be any number between **1** and **20**	MARC Tag field number – for example: **245** (Title) Any Tag can be matched to ant Line Number	Specify which part of the MARC tag to send - see table below for more details	Specify which part of the MARC tag to send - see table below for more details	

The table below explains how the user can specify which parts of the MARC tag to send:

OPERATOR	DESCRIPTION	EXPLANATION
blank (Default)	The entire MARC tag is printed	If the column is left blank, then the entire MARC tag is printed
+	All data in the specified tag is printed no matter how many tags are included in the record	All Subject listings are printed, where there is only one or several or hundreds!
and sf in ('p', 'n')	Only the subfields specified to be printed within this **Authority** Tag	If 440 (Series) tag, only the Series name and number printed
and cat_sf in ('c')	Only the subfields specified to be printed within this **Non-Authority** Tag	If 260 (Publisher) tag, only the 'c' (Date) subfield printed (and not Place or Publisher)



A fixed layout template displaying the Tag (or Subfield) data (**Fields 1-20**), and Tag Descriptions (**Fields 1A – 20A**):

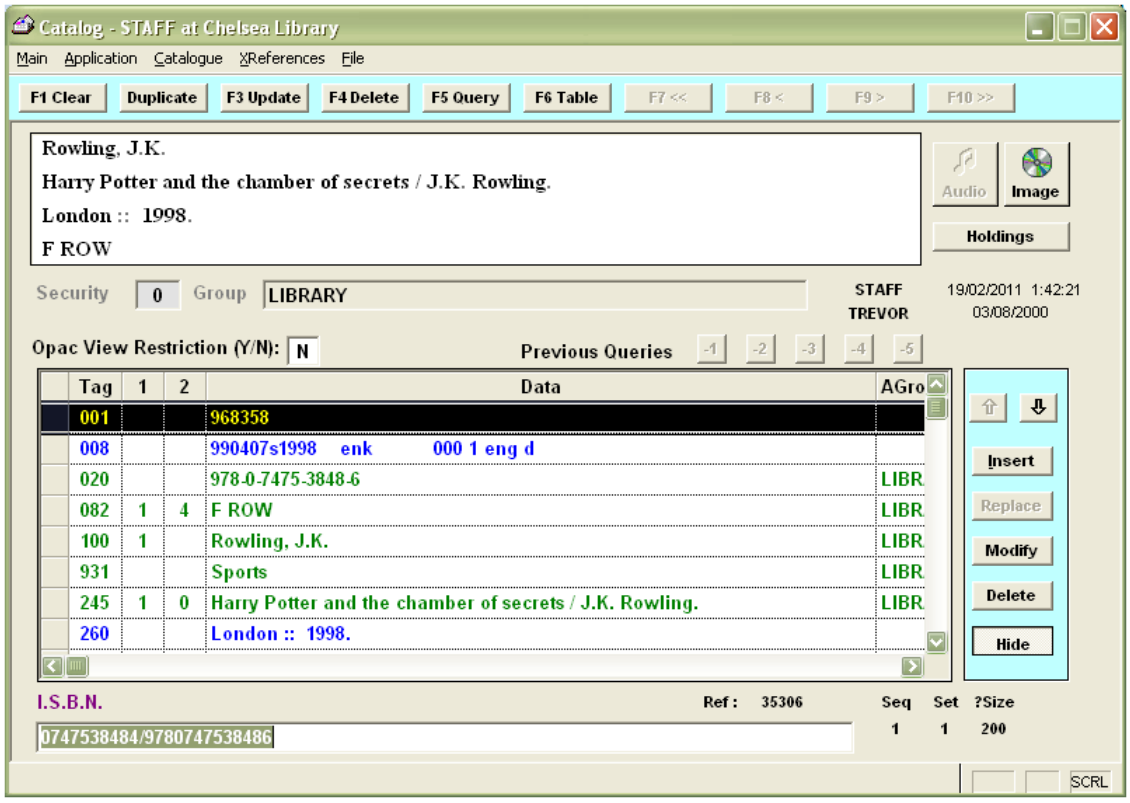

Detail Block
FIELD1A
FIELD1
FIELD2A
FIELD2
FIELD3A
FIELD3
FIELD4A
FIELD4

APPENDICES

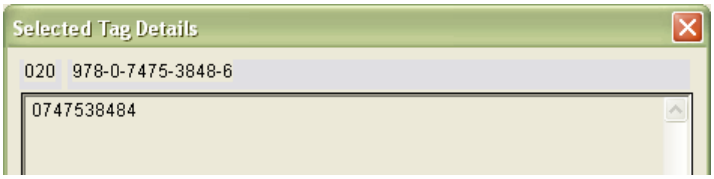
Appendix 1: 10 Digit and 13 Digit ISBN Formats

Amlib will search both 10 and 13-digit ISBN formats:

1. Launch the *Amlib* client
2. Go to **Main** > **Catalogue** > **Catalogue**– the Catalog screen will display
3. Type in a 10-digit ISBN and the 13-digit ISBN – separated with a **/** - for example: **0747538484/9780747538486**
4. Click the **F5 Query** button – any matching record will then be displayed:



5. Double-click the **020 | ISBN** field to display of the 10-digit version of a 13-digit ISBN:



- **Starting with the ISBN-10:** 1-844137-94-5
- **Eliminate the check digit:** 1-844137-94
- **Add the prefix 978:** 978-1-844137-94
- **Calculate a new check digit to get the ISBN-13:** 978-1-844137-945

Both ISBNs: **978-0-7475-3848-6** and **0-747538-48-4** represent the same Bibliographic record.

Appendix 2: USMARC

MARC is an acronym for **MA**chine **R**eadable **Catalogue**. USMARC was developed by *the Library of Congress* and was formerly named LC MARC.

Amlib uses USMARC because:

- It is now the international standard for cataloguing
- Each record is written in a format that can easily be read, retrieved and manipulated by a computer
- As the data contains consistent "signposts", computers can read and interpret records so that the Bibliographic data can be inserted correctly into any software in any country of the World. That is, the "signposts" are written for machines, not for people so there is no problem with different languages, etc.
- Using this standard enables better sharing of data between libraries and compatibility with outside agencies – for example: *ABN*, *SL of WA*, *SCIS*
- The format is compact, taking less storage space to hold data than a text-based system

Sample MARC record

00491nam 2200181 a
4500001000700000005001700007007000300024008004100027020001500068040001100083082001600094100002300110245004500133260003800178300001100216650004800227650003400275-985170-19990927105630.0-t -990923s1999 at 000 1 eng d- a0140279083- aN.S.W.-14aFbMET2a13-1 aMetzenthen, David.-10aStony heart country /cDavid Metzenthen.- aRingwood, Vic. :bPenguin,c1999.- a208 p.-07aCountry lifezAustraliaxFiction.2scisshl.-07aAustralian stories.2scisshl.-

↓

00491nam 2200181 a
4500**001***0007*00000**005***0017*00007**007***0003*00024**008***0041*00027**020***0015*00068**040***0011*00083**082***0016*00094**100***0023*00110**245***0045*00133**260***0038*00178**300***0011*00216**650***0048*00227**650***0034*00275-985170-19990927105630.0-t -990923s1999 at 000 1 eng d- a0140279083- aN.S.W.-14aFbMET2a13-1 aMetzenthen, David.-10aStony heart country /cDavid Metzenthen.- aRingwood, Vic. :bPenguin,c1999.- a208 p.-07aCountry lifezAustraliaxFiction.2scisshl.-07aAustralian stories.2scisshl.-

- First 24 positions, *ending with* **4500.**: Leader
- Tag directories: 12 characters long
- Each Tag directory composed as follows: Tag No –for example: **100**, length of field – for example: *0023*, starting point of this field – for example: 00110
- Each Marc record can consist of "signposts" that Tags, Indicators and Subfields. The Tag, Indicator and Subfield makes up each Field of the Marc record.

Tags

Each data field is identified by a 3-digit number.

In *Amlib* the Tag is often associated with a Description – for example: Tag 245 is always Title and Tag 260 is always Publisher.

Tag "Families"

TAG	DESCRIPTION
000s	Control fields, number & codes
100s	Main entries – usually author
200s	Title and Title related fields
300s	Physical description
400s	Series related fields
500s	Notes
600s	Subject related fields
700s	Added entries – other than Subject or Series
800s	Series added entries
900s	Locally defined entries. For example holdings information (often used in conversions)

Even though there are hundreds of MARC Tags, only 10% are used commonly

Indicators

Each indicator is identified by a number between **0** to **9** (letters can be used but are not common). The numbers often are an indication as to how to "treat" text or categorise a tag.

For example: the 2nd indicator for title indicates the number of non-filing characters to ignore, including spaces. In the **245** tag below, the 2nd indicator shows **4**, to ignore **The_** so that filing begins with the letter **Q** in **Quasar**. Usually *Amlib* sorts out the filing of these characters for us – we do not usually have to enter data in these columns when manually entering items.

The first indicator in the **600 | Subject – Personal Name** entry indicates the type of entry (for example: **1** Surname, **3** Family name). Therefore, most would have a **1** as the first indicator.

Parallel Content

The **100**s, **400**s, **600**s, **700**s and **800** tags usually follow the following numbering to maintain consistency.

TAG	DESCRIPTION
X00	Personal Names
X10s	Corporate Names
X11	Meeting Names
X30	Uniform Titles
X40	Bibliographic titles
X50	Topical Terms
X51	Geographic names

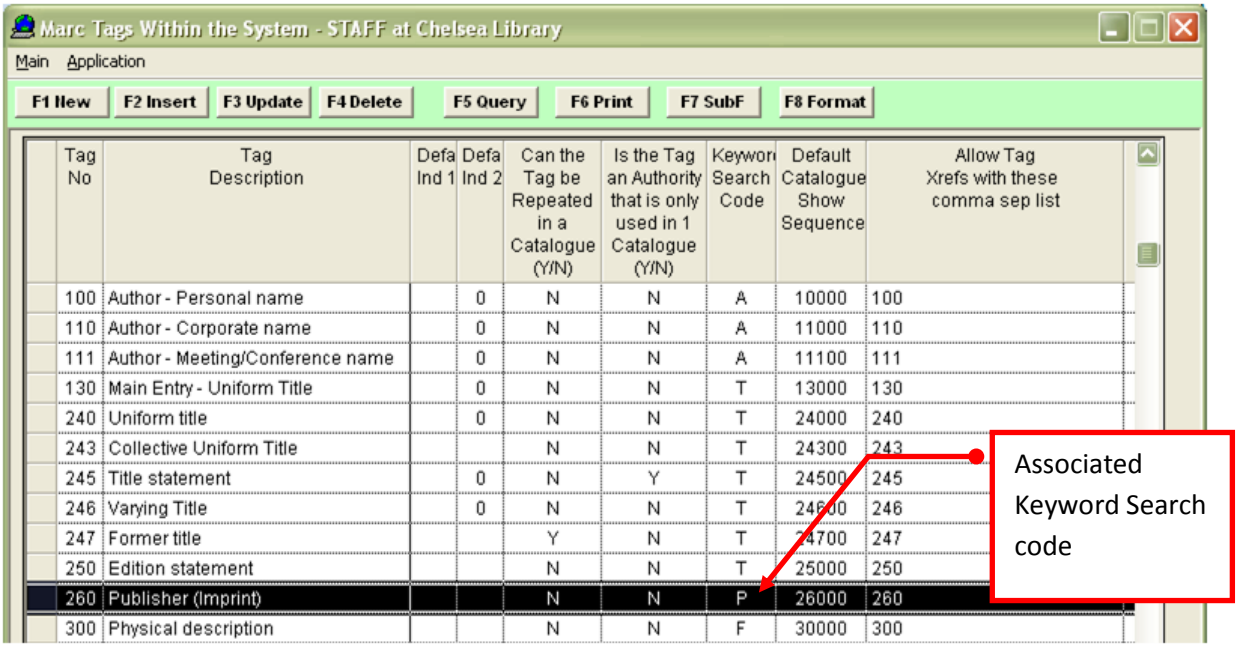
Therefore **610** would be **Subject Heading, Corporate name** and **110** would be **Author, Corporate name**.

Subfields

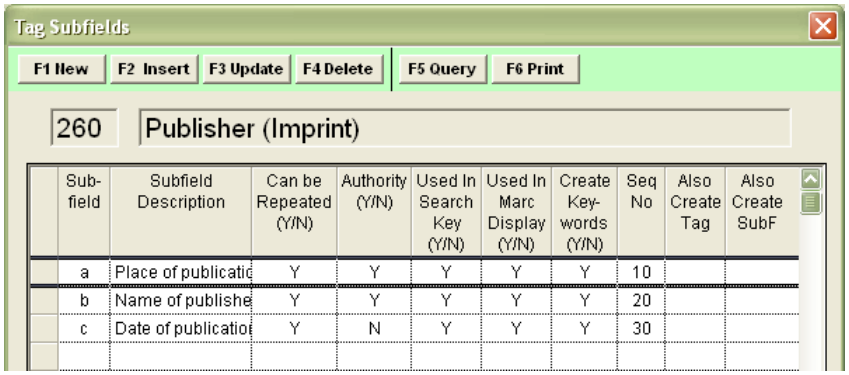
A lower case letter or occasionally a number identifies each Subfield. In general, if you are using a tag, it MUST contain a Subfield **a**. Publication and URL data is an exception to this rule.

The MARC Tags used by *Amlib* can be accessed via:

1. Launch the *Amlib* client
2. Go to **Menu** > **Authorities** > **MarcTags** – the Marc Tags Within the System table will display:



3. Each Subfield can be checked by highlighting the Tag, and selecting the **F7 SubF** button – the Tag Subfields table will display:

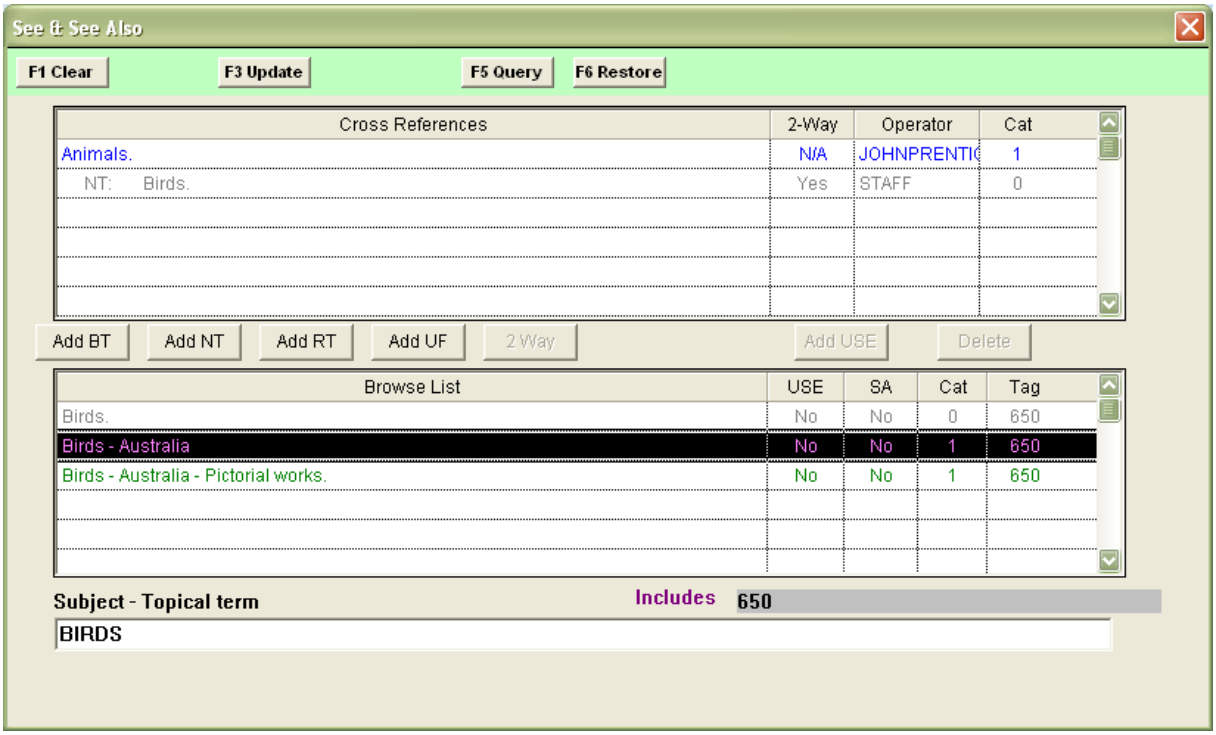


Sub-field	Subfield Description	Can be Repeated (Y/N)	Authority (Y/N)	Used In Search Key (Y/N)	Used In Marc Display (Y/N)	Create Key-words (Y/N)	Seq No	Also Create Tag	Also Create SubF
a	Place of publicatic	Y	Y	Y	Y	Y	10		
b	Name of publishe	Y	Y	Y	Y	Y	20		
c	Date of publicatio	Y	N	Y	Y	Y	30		

Appendix 3: Cross References (See and See Also)

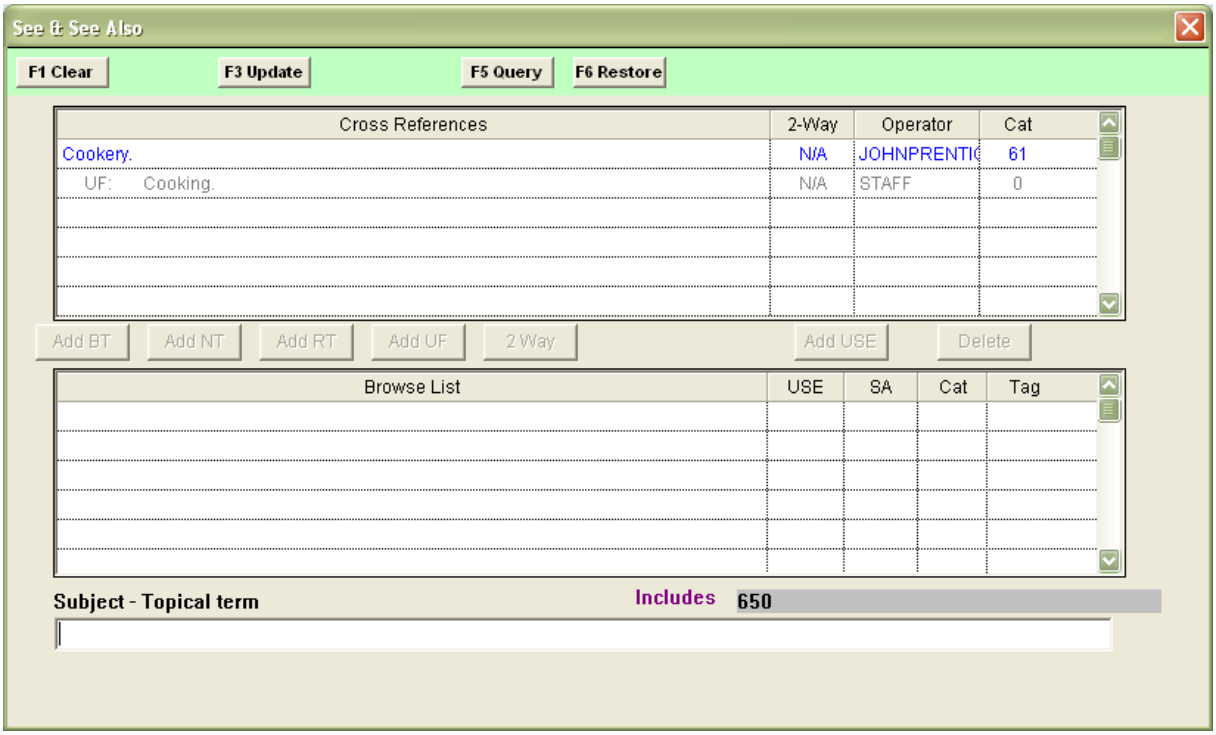
Patrons are guided to alternative headings. The ability to put *See* and *See Also* references into the system is useful for library operators (for example: **Roller Blading** *see* **Inline Skating**) as it enhances search possibilities. Nothing found when searching **Shares** or **Stock Market**? (Preferred terms are **Stocks** and **Stock Exchange**). Nothing found when searching **Renovations**? (Preferred term is **Interior Decoration**). **Tidal Waves** found 6 entries, **Tsunamis** found more than 30. Should have **Tidal Waves** *see also* **Tsunamis** to link the two headings.

1. Launch the *Amlib* client
2. Go to **Menu** > **Authorities** > **MarcTags** – the Marc Tags Within the System table will display
3. Search for and select an Authority using the **F5 Search** button
4. From the menu, select **Authority** > **See & See Also** – the See & See Also screen will display:



SEE ALSO	SEEN BY	SEE
BT (Broader Term), **NT** (Narrower Term), **RT** (Related Term)	*Use For*	*Use*

Allows reference to other related headings (from a preferred headings to other preferred, related headings). An Authority can have many *See Also* references.



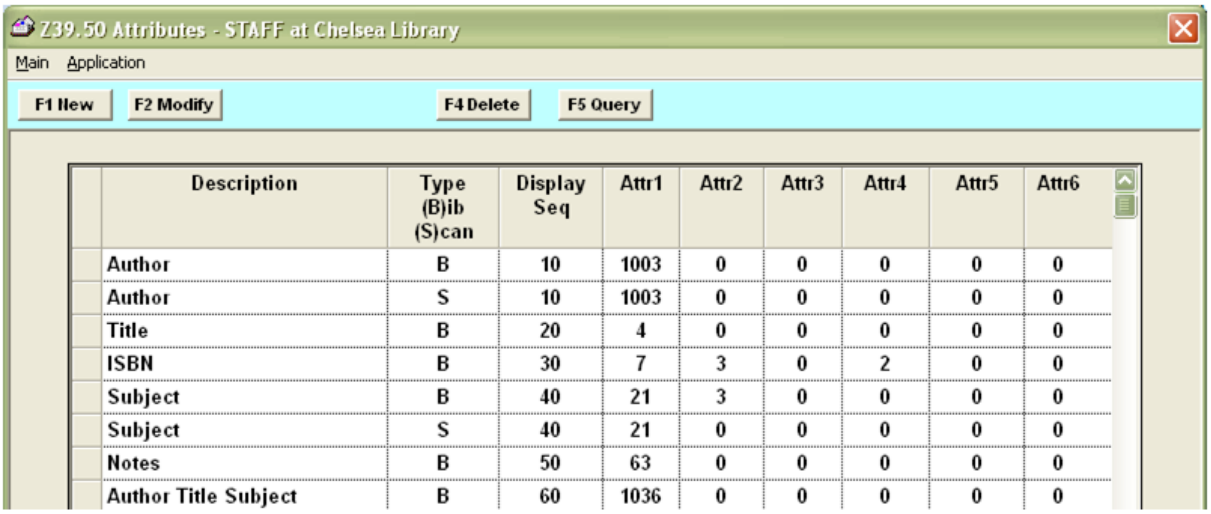
When searching for a commonly used term (for example: **Cooking**) the *NetOpacs* user will be given a result instead of a message that there are no items found for that term.

Appendix 4: Z39.50 Searching – Settings and Parameters

CatZAttributes

Attributes create the sequence of display of the records returned. Bib searches return MARC records, Scan searches return Authorities. Scan searches are not currently supported in Amlib. Attr1 concerns the Use attributes and should be set up as displayed here.

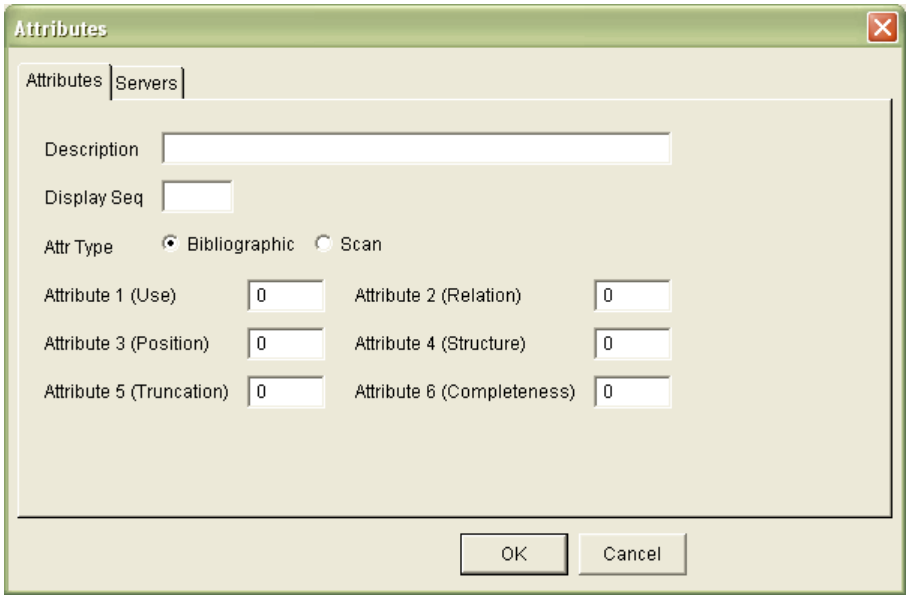
1. Launch the *Amlib* client
2. Go to **Menu** > **Catalogue** > **CatZSearch** – the Z39.50 Search screen will display
3. From the menu, select **Application** > **CatZAttributes** – the Z39.50 Attributes screen will display:



Description	Type (B)ib (S)can	Display Seq	Attr1	Attr2	Attr3	Attr4	Attr5	Attr6
Author	B	10	1003	0	0	0	0	0
Author	S	10	1003	0	0	0	0	0
Title	B	20	4	0	0	0	0	0
ISBN	B	30	7	3	0	2	0	0
Subject	B	40	21	3	0	0	0	0
Subject	S	40	21	0	0	0	0	0
Notes	B	50	63	0	0	0	0	0
Author Title Subject	B	60	1036	0	0	0	0	0

FIELD	EXPLANATION			EXAMPLE
Description	User defined description of the search			Author
Type (B)ib (S)can	**B**	Biblio	Returns Bibliographic records (Catalogue details)	Returns all the Bibliographic records associated with the Author search term (e.g. Catalogue records by Jennings
	S	Scan	Returns Authority records	Returns all the Authority records associated with the Author search term (For example: Authors with the surname of Jennings)
Display Seq	Sequence : Sets the order in which the 4 default search will display in CatZSearch			Author search first as it has the lowest Sequence number
Attr(ibute) Sets	Six sets which determine the Search option functions			See below for details of the Search Attributes and Values

4. To enter a parameter, click the **F1 New** button – the Attributes screen will display:

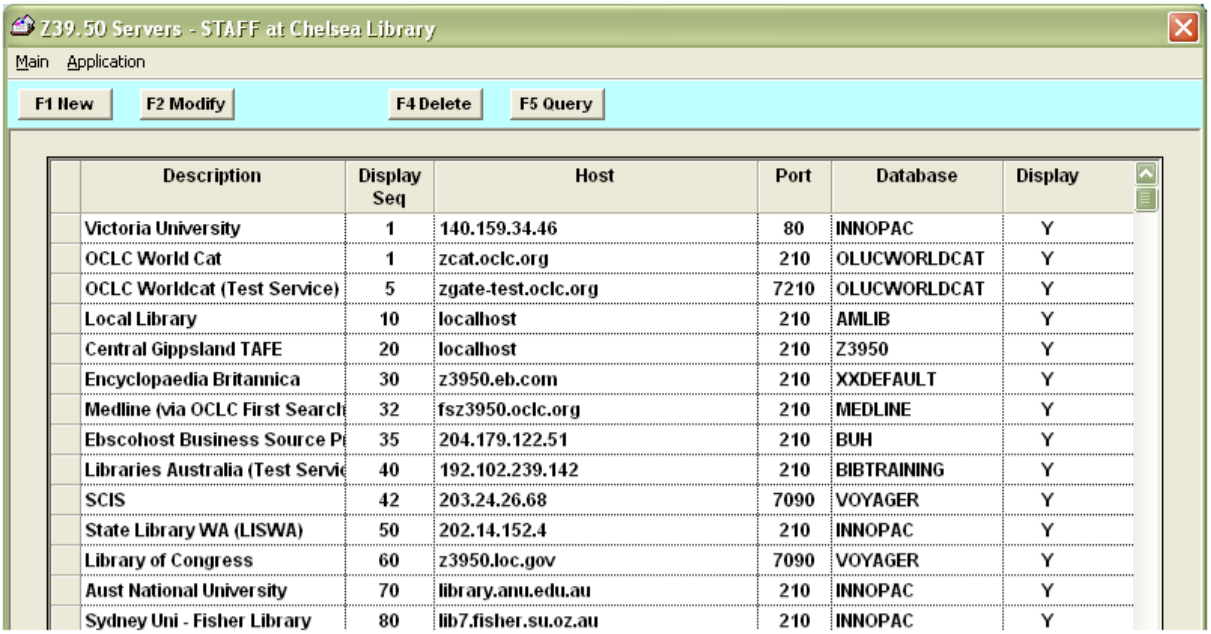


5. Type in the Attributes and the Servers to apply to details
6. Click the **OK** button when complete

CatZServers

Servers are the Libraries or databases you wish to search.

1. Launch the *Amlib* client
2. Go to **Menu** > **Catalogue** > **CatZSearch** – the Z39.50 Search screen will display
3. From the menu, select **Application** > **CatZServers** – the Z39.50 Servers table will display:

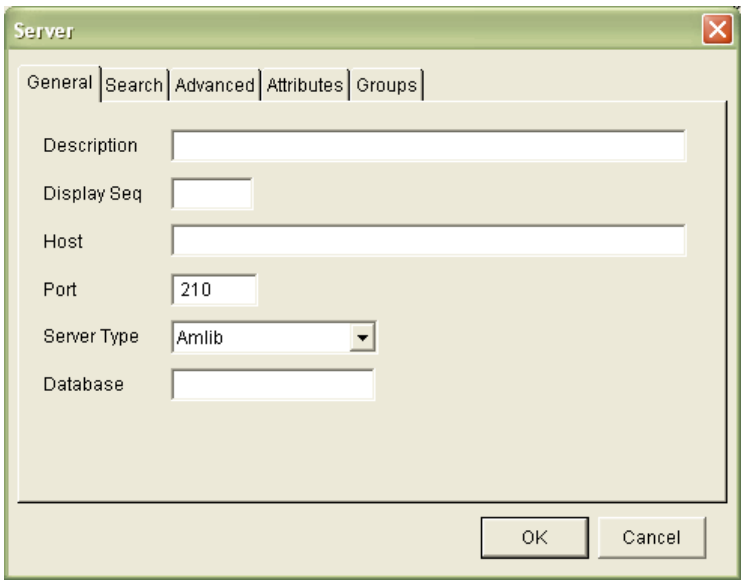


Description	Display Seq	Host	Port	Database	Display
Victoria University	1	140.159.34.46	80	INNOPAC	Y
OCLC World Cat	1	zcat.oclc.org	210	OLUCWORLDCAT	Y
OCLC Worldcat (Test Service)	5	zgate-test.oclc.org	7210	OLUCWORLDCAT	Y
Local Library	10	localhost	210	AMLIB	Y
Central Gippsland TAFE	20	localhost	210	Z3950	Y
Encyclopaedia Britannica	30	z3950.eb.com	210	XXDEFAULT	Y
Medline (via OCLC First Searcl	32	fsz3950.oclc.org	210	MEDLINE	Y
Ebscohost Business Source P	35	204.179.122.51	210	BUH	Y
Libraries Australia (Test Servi	40	192.102.239.142	210	BIBTRAINING	Y
SCIS	42	203.24.26.68	7090	VOYAGER	Y
State Library WA (LISWA)	50	202.14.152.4	210	INNOPAC	Y
Library of Congress	60	z3950.loc.gov	7090	VOYAGER	Y
Aust National University	70	library.anu.edu.au	210	INNOPAC	Y
Sydney Uni - Fisher Library	80	lib7.fisher.su.oz.au	210	INNOPAC	Y

FIELD	EXPLANATION	EXAMPLE

Description	The description visible in Amlib for the Library or Database	**National Library of Australia**
Display Seq	The order in which the Libraries or Database display	**10,20,30**
Host	The Internet or IP Address of the Library or Database.	**ilms.nla.gov.au**
Port	TCP/IP port. The most common port number for *Z39.50* is **210**	**210**
Database	Name of the Database – usually supplied by the Library or Database being searched	**NLA**
Display		

4. To enter a parameter, click the **F1 New** button – the Server screen will appear:



5. Enter details
6. Click the **OK** button when complete

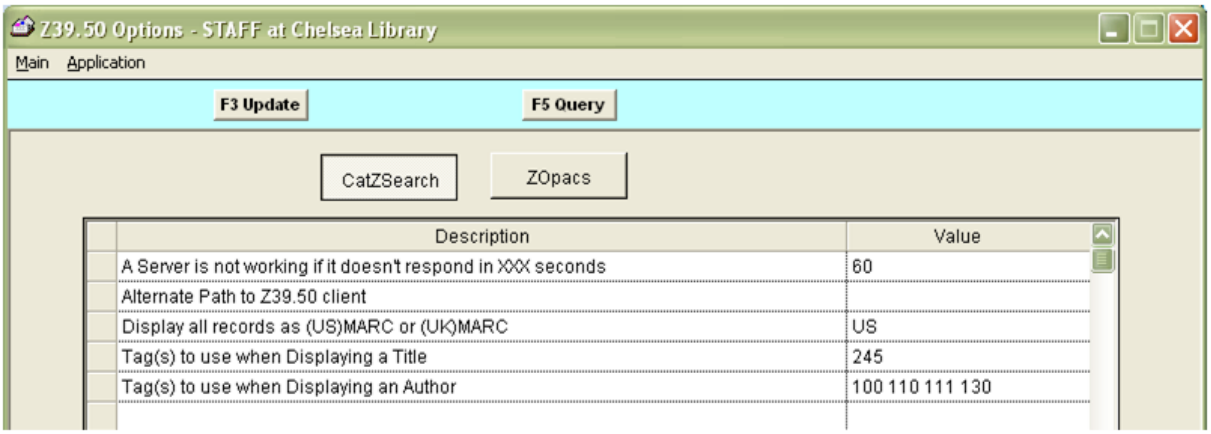
A list of accessible *Z39.50* target databases in Australia can be found at the following link from the *National Library*:

- http://www.nla.gov.au/libraries/z3950/z3950list.html

CatZOptions

Some options can be configured individually for each site using *Z39.50* Catalogue or Opac searches, according to requirements.

1. Launch the *Amlib* client
2. Go to **Menu** > **Catalogue** > **CatZSearch** – the Z39.50 Search screen will display
3. From the menu, select **Application** > **CatZOptions** – the Z39.50 Optionstable will display:



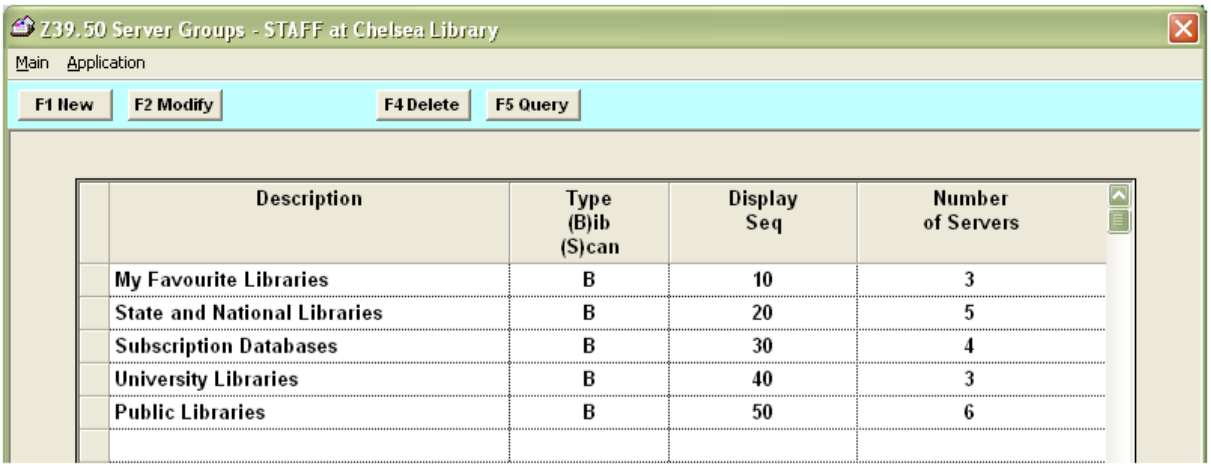
DESCRIPTION	EXPLANATION	VALUE
A server is not working if it does respond in XXX seconds	Can be any amount of time you want to wait.	**60**
Alternate path to Z39.50 client	Is not currently used	
Tag(s) to use when Displaying a Title	Can be as many Tags as you like.	**245**
Tag(s) to use when Displaying an Author	Can be as many Tags as you like.	**100,110**
Registration Key	Is not currently used	
Display all records as (US)MARC or (UK)MARC	Display MARC records in US or UK version.	**US**

CatZGroups

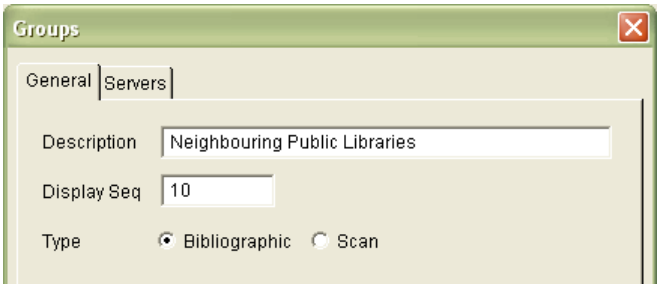
The Servers being searched can be grouped together so that parallel searches are performed across multiple databases.

1. Launch the *Amlib* client
2. Go to **Menu** > **Catalogue** > **CatZSearch** – the Z39.50 Search screen will display

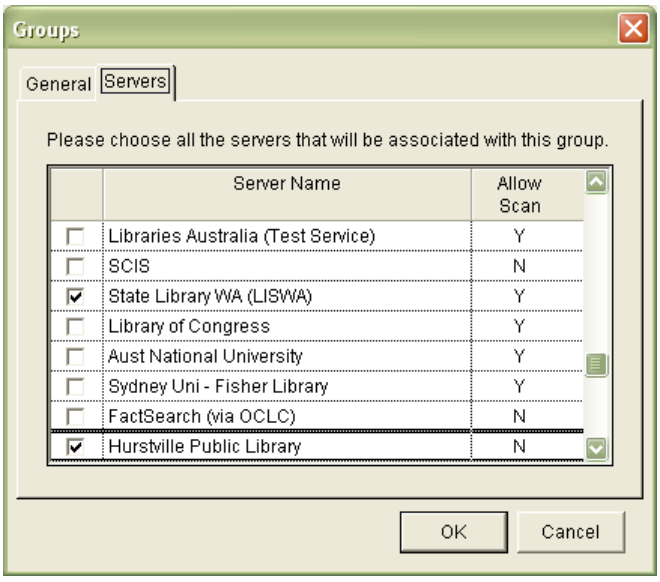
3. From the menu, select **Application** > **CatZGroups**– the Z39.50 Server Groups table will display:



4. To enter a parameter, click the **F1 New** button – the Groups screen will display:



5. On the General tab enter the following details: Description, Display Seq and Type
6. Click on the Servers tab



7. Select the Servers to be used for this Group
8. Click the **OK** button when complete

Appendix 5: MARC Tag Subfields & Punctuation

To understand MARC tag subfields you need to consider that most MARC tags (or fields) contain several related pieces of data. Each piece of data within the field is called a **subfield**, and each subfield is identified by a subfield code.

For example: the **245** MARC tag is used for the Title Statement and commonly contains the following three subfields (there are in fact many more):

- **$a** for the title proper
- **$b** for the remainder of the title (for example: subtitles)
- **$c** for the statement of responsibility

The **$** combined with a letter is called a delimiter (for example: **$a**). Each of the subfields has its own delimiter, which designates the beginning of that subfield. Subfields end either with another delimiter for the next subfield or the "end of field" mark. This mark tells the computer where to end the variable field.

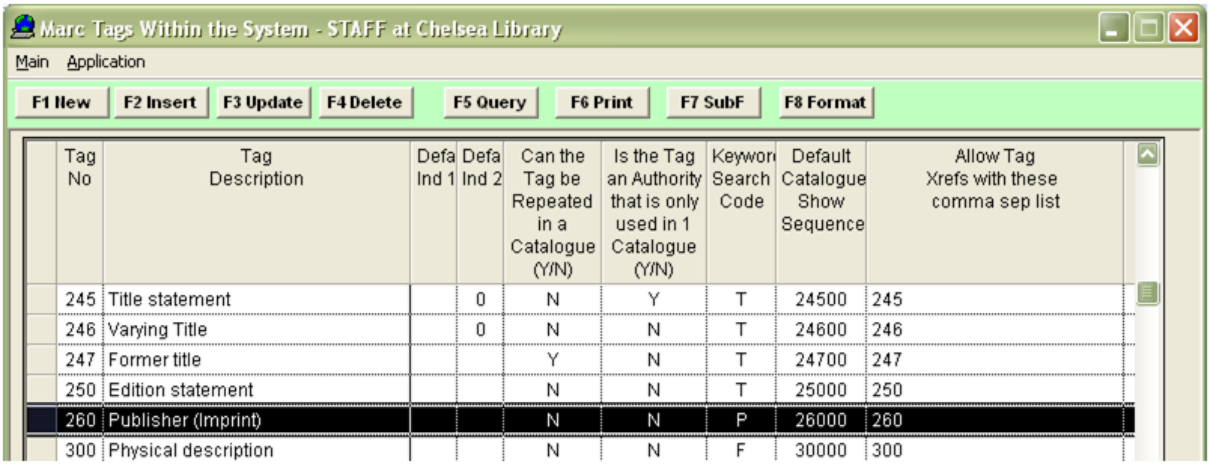
A MARC tag also contains 2 **indicators** just after the tag number. The two indicators contain values which interpret or supplement the data found in the tag. In the **245** tag, the **first** indicator is used to denote whether a title added entry is made (where no author main entry is present). The **second** indicator specifies the number of character positions associated with a definite or indefinite article (for example: **Le**, **An**) at the beginning of a title that are disregarded in sorting and filing processes.

- **245 14$a**The people of Perth : **$b**a social history of Western Australia's capital city.

Punctuation

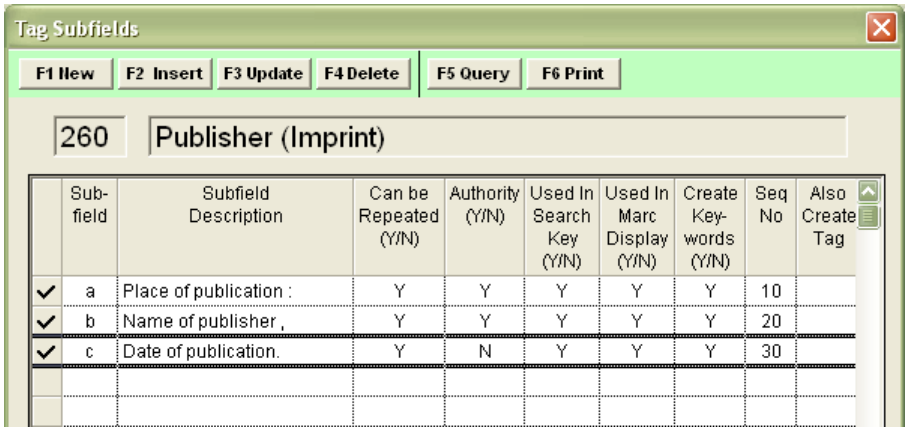
Whilst it is possible to have the *Amlib* system automatically create the required punctuation for the various tags whilst cataloguing (see Authorities – Punctuation) this can lead to issues with regard to importing MARC records. As a result, you might like to adjust the Subfield headings that appear in the Cataloguing Worksheet to indicate the necessary punctuation to be manually inserted.

1. Launch the *Amlib* client
2. Go to **Menu** > **Authorities** > **MarcTags** – the Marc Tags Within the System screen will display:



Tag No	Tag Description	Defa Ind 1	Defa Ind 2	Can the Tag be Repeated in a Catalogue (Y/N)	Is the Tag an Authority that is only used in 1 Catalogue (Y/N)	Keywor Search Code	Default Catalogue Show Sequence	Allow Tag Xrefs with these comma sep list
245	Title statement		0	N	Y	T	24500	245
246	Varying Title		0	N	N	T	24600	246
247	Former title			Y	N	T	24700	247
250	Edition statement			N	N	T	25000	250
260	Publisher (Imprint)			N	N	P	26000	260
300	Physical description			N	N	F	30000	300

3. In the list, select the Tag to be modified (for example: **260 – Publisher (Imprint)**), and click the **F7 SubF** button – the Tag Subfields screen will display:



4. In the Subfield Description field, adjust the text to indicate the necessary punctuation – for example: **Place of Publication :**
5. Click the **F3 Update** button when complete
6. Close the *Authorities* module for the changes to be visible in the Catalogue Worksheet

Appendix 6: Catalogue Maintenance Tasks

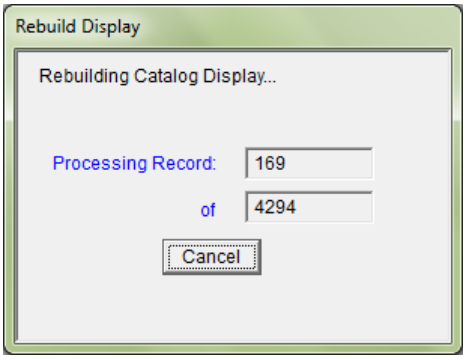
1. Launch the *Amlib* client
2. Go to **Main** > **Catalogue** > **CatMaintenance** – the Catalog Maintenance screen will display

Rebuild the Catalogue Display

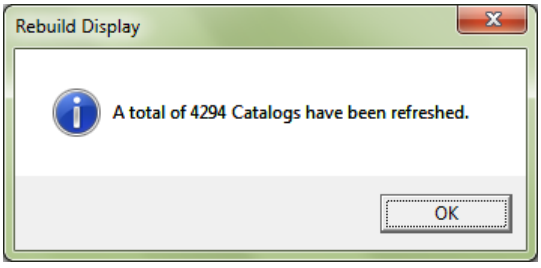
- If the Tag Numbers are altered for the 4 lines of the brief Catalog screen display (**Main** > **Catalogue** > **CatDisplayTags**), the rebuild will refresh all existing Catalogue records to the new settings

Carey, Peter, 1943-
Oscar and Lucinda
Melbourne : Australian Large Print, 1989
LP CARE

1. Choose the Maintenance Task: **Rebuild the Catalog Display**
2. Only consider catalogue records created before: Enter the date to which this process will apply (defaults to a year ago): enter today's date if the rebuild is to apply to all Catalogue records
3. Leave For cat ref insertion enter tag number here field blank
4. There are no Select Options relating to the Maintenance Task options so the **Options...** button will be ***greyed*** out
5. Click the **F3 Start** button to begin the process – a Rebuild Display prompt will display:



6. Once the process is completed a prompt will display how many catalogue records were refreshed: **A total of XXXX Catalogs have been refreshed.**

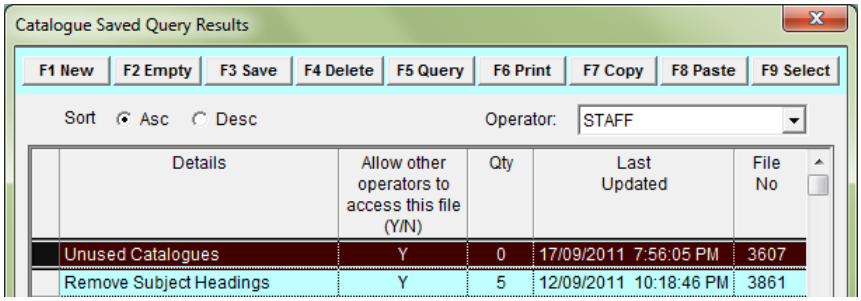


7. Click the **OK** button

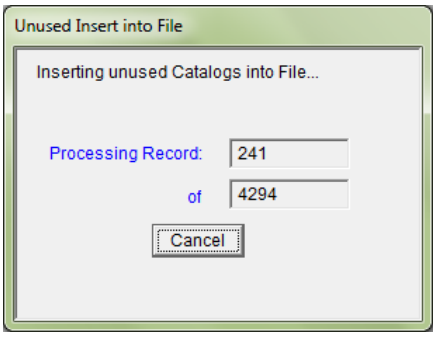
Insert all Unused Catalogs into a Saved File

Inserts all the Catalogue records that have no related Stockitem, Periodical or Order records into a Saved File. This enables the Catalogue records to be viewed before deleting. Further processing can be done using the Delete all Unused Catalogues that are in a Saved File if required.

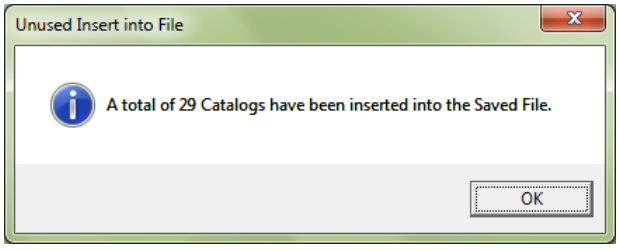
1. Choose the Maintenance Task: **Insert all Unused Catalogs into a Saved File**
2. Only consider catalogue records created before: Enter the date to which this process will apply (defaults to a year ago): enter today's date if the insertion is to apply to all Catalogue records
3. Leave For cat ref insertion enter tag number here field blank
4. Click the **Options...** button – the Catalogue Saved Query Results screen will display:



5. Highlight a file (or click **F1 New** to create a new file, enter the Details description and click the **F3 Save** button) and click the **F9 Select** button
6. Click the **F3 Start** button to begin the process – a Unused Insert into File prompt will display:



7. Once the process is completed a prompt will display how many catalogue records were inserted into the Saved File: **A total of XXXX Catalogs have been inserted into the Saved File.**



8. Click the **OK** button

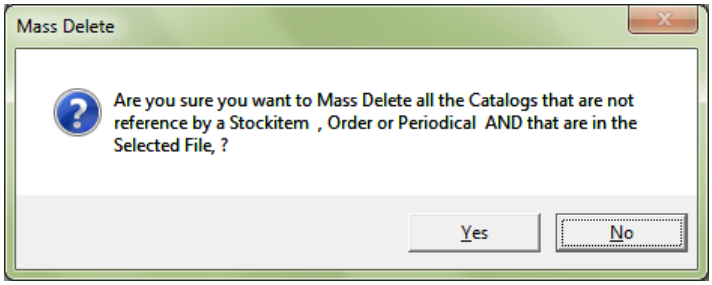
Delete all unused Catalogues that are in a Saved File

Delete the Catalogue records that are not referenced by a Stockitem, Order or Periodical record **from a selected File**.

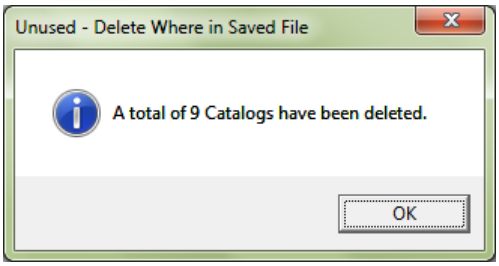
When catalogues are deleted, all the Non-Authorities are automatically deleted.

These Authorities will be deleted based on the Level set in **Main** > **Supervisor** > **Installation** – Catalogue tab – Catalogue deletion level (1-4) (1=least severe, …, 4=most severe) parameter.

1. Choose the Maintenance Task: **Delete Unused Catalogs that are in a Saved File**
2. Only consider catalogue records created before: Enter the date to which this process will apply (defaults to a year ago): enter today's date if the deletion is to apply to all Catalogue records
3. Leave For cat ref insertion enter tag number here field blank
4. Click the **Options...** button – the Catalogue Saved Query Results screen will display:
5. The Catalogue Saved Query Results box will display, from which the Saved File created during the Insert all Unused Catalogs into a Saved File maintenance task can be selected by highlighting the Saved File and clicking the **F9 Select** button
6. Click the **F3 Start** button – a prompt with the following message will display:
   Are you sure you want to Mass Delete all the Catalogs that are not reference by a Stockitem, Order or Periodical AND that are in the Selected File?



7. Click the **Yes** button to begin the deletion process – once the process is completed a prompt will display how many catalogue records were deleted: **A total of XXXX Catalogs have been deleted.**



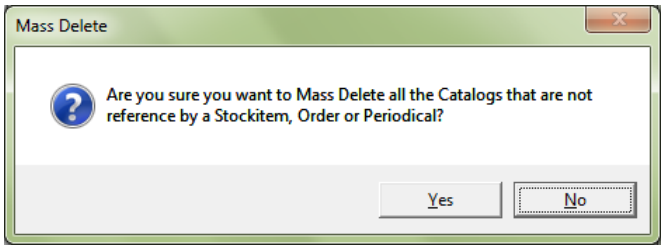
8. Click the **OK** button

Mass Delete all Unused Catalogues

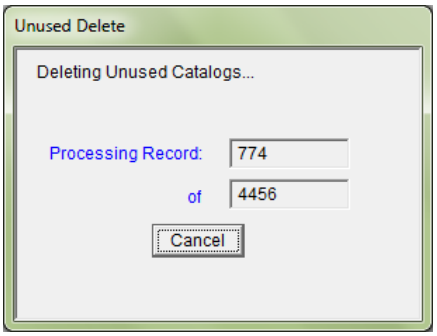
This option will delete all Catalogues not linked to an Order, Stockitem or Periodical record. There are no options for this facility. The associated Authorities will be deleted based on the Level set in Supervisor setting: **Catalogue deletion level (1-4) (1=least severe, 4=most severe)**

Please Note: Prior to deleting the Unused Catalogues, they can be viewed by selecting the Maintenance Task: **Insert all Unused Catalogues into a Saved File**. This enables the Catalogues to be viewed before running the Mass Delete.

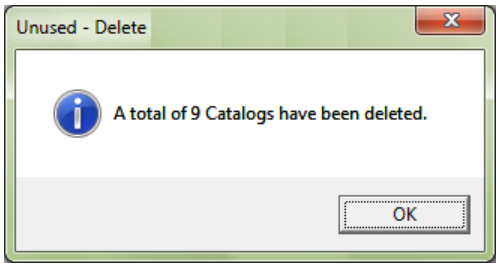
1. Choose the Maintenance Task: **Mass Delete all Unused Catalogs**
2. Only consider catalogue records created before: Enter the date to which this process will apply (defaults to a year ago): enter today's date if the deletion is to apply to all Catalogue records
3. Leave For cat ref insertion enter tag number here field blank
4. The **Options...** button will be ***greyed*** out
5. Click the **F3 Start** button – a prompt with the following message will display:
   Are you sure you want to Mass Delete all the Catalogs that are not reference by a Stockitem, Order or Periodical?



6. Click the **Yes** button to begin the deletion process – an Unused Delete prompt will display:



7. Once the process is completed a prompt will display how many catalogues were deleted:
   A total of XX Catalogs have been deleted.

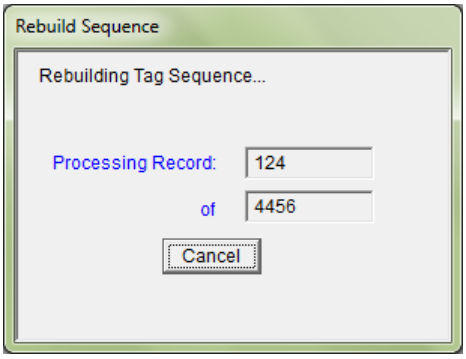


8. Click the **OK** button

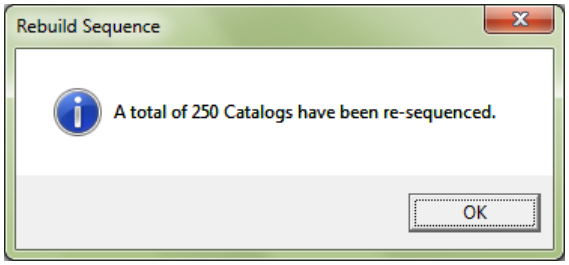
Re-sequence the Tags for all Catalogs

Refreshes the MARC display based on the Default Catalogue Show Sequence column on the Marc Tags Within The System screen (**Main** > **Authorities** > **MarcTags**).

1. Choose the Maintenance Task: **Re-sequence the tags for all Catalogs**
2. Only consider catalogue records created before: Enter the date to which this process will apply (defaults to a year ago): enter today's date if the deletion is to apply to all Catalogue records
3. Leave For cat ref insertion enter tag number here field blank
4. There are no Select Options relating to the Maintenance Task options so the **Options...** button will be ***greyed*** out
5. Click the **F3 Start** button – a Rebuild Sequence prompt will display:



6. Once the process is completed a prompt will display how many catalogues were re-sequenced: **A total of XX Catalogs have been re-sequenced.**



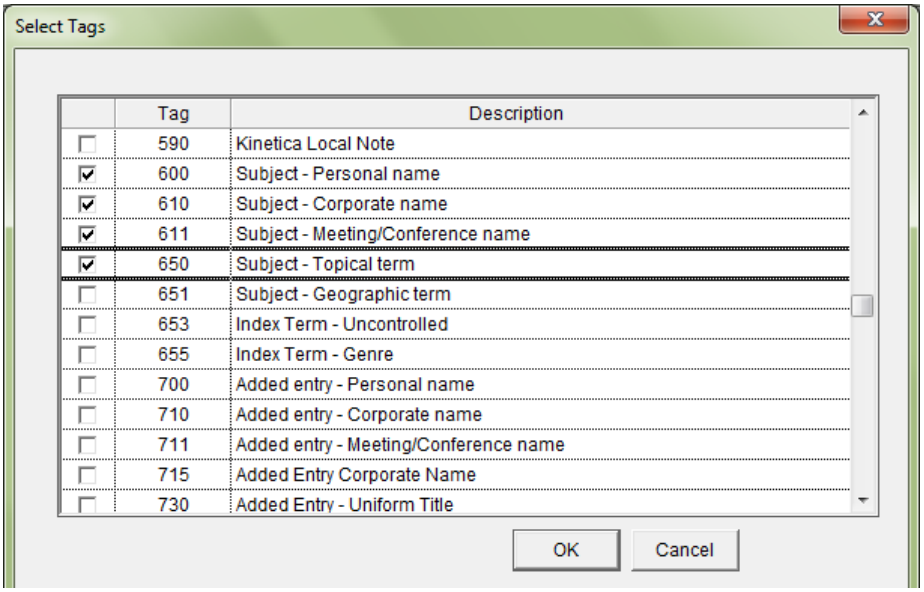
7. Click the **OK** button

Rebuild the Marc Display

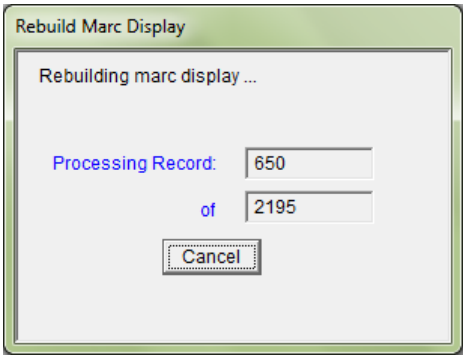
Refreshes the MARC display (the list of Marc Tags in the Catalogue record) based on the Used in Marc Display (Y/N) column on the Tag Subfields screen (**Main** > **Authorities** > **MarcTags** – **F7 SubF**). Can be **Y** or **N**.

1. Choose the Maintenance Task: **Rebuild the Marc Display**
2. Only consider catalogue records created before: Enter the date to which this process will apply (defaults to a year ago): enter today's date if the deletion is to apply to all Catalogue records

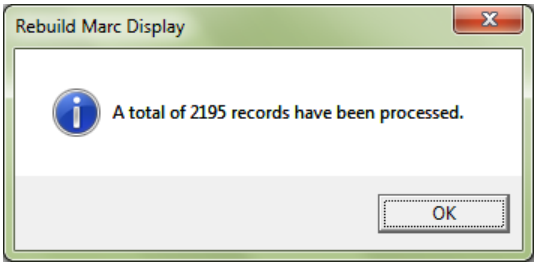
3. Leave For cat ref insertion enter tag number here field blank
4. Click the **Options...** button – the Select Tags screen will display:



5. Select the Tag(s) which to rebuild and click the **OK** button
6. Click the **F3 Start** button – a Rebuild Marc Display prompt will display:



7. Once the process is completed a prompt will display how many catalogues were re-sequenced: **A total of XX records have been processed.**

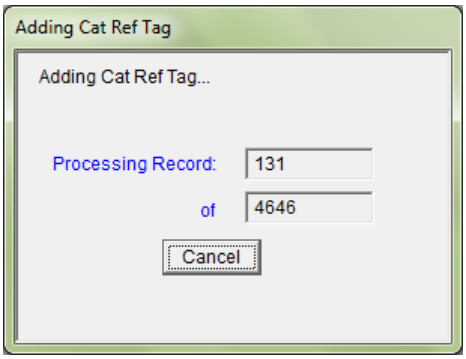


8. Click the **OK** button

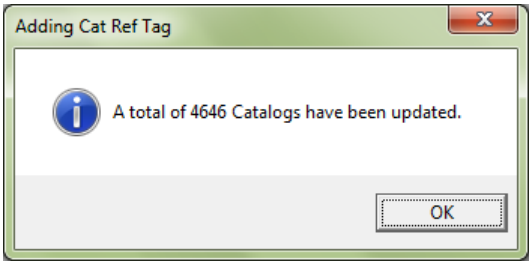
Add the Selected Tag containing Cat Ref number to All Catalogues

Add the Catalogue Reference Number to each Catalogue record. Mostly this will be used for adding the Catalogue Reference Number as the **035** Tag

1. Choose the Maintenance Task: **Add the selected tag containing cat ref number to all Catalogues**
2. Only consider catalogue records created before: Enter the date to which this process will apply (defaults to a year ago): enter today's date if the deletion is to apply to all Catalogue records
3. Enter the For cat ref insertion enter tag number here tag – generally **035**
4. There are no Select Options relating to the Maintenance Task options so the **Options...** button will be ***greyed*** out
5. Click the **F3 Start** button – an Adding Cat Ref Tag prompt will display:

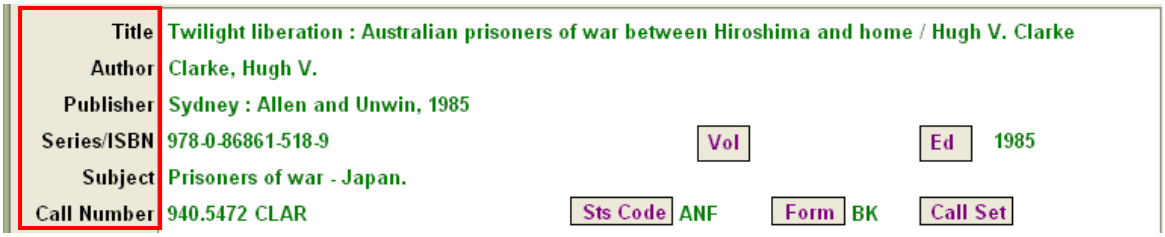


6. Once the process is completed a prompt will display how many catalogues were re-sequenced: **A total of XX Catalogs have been updated.**



7. Click the **OK** button

1. Define the Label and Tags to Display for each Line – these Tags (and their Labels) define how items with a particular Form code type display in the Stockitem screen:



More than one tag can be added to the Tags to Display column. The tags should be added in order of preference – for example: **100 110 700**. If the **100** tag is present in a Catalogue record then the

contents will display for that Line. If no **100** tag is present, then the contents of the **110** tag will display, and so on.

2. Click the **F3 Save** button when complete
3. Repeat for all other Form codes
4. Close the *Stockitem* module for these settings to take effect

Appendix 7: USMARC: Some Common Tags

There are literally hundreds of MARC tags that can be used. However only about 10% of these are used commonly.

COMMON TAGS	INDICATORS 1	2	SUBFIELDS Many of these Subfield will never be used. In most cases a tag MUST have a Subfield **a**. (**R**) indicates Repeatable Subfields. All others are (**NR**) Non-Repeatable		
001 Control Number Assigned by the organisation creating or distributing the record			Contains no subfield codes – for example: *SL of WA*, *Innopac* Number (8 characters)		
			1367061X		
020 **ISBN** **(R)** Repeatable Indicators undefined	0	0	**a** *Subfield most often used ISBN	**c** Terms of Availability	**z** Cancelled or Invalid **(R)**
			0732248493	**$14.50**	**0397318487**
022 **ISSN** **(Periodicals often have an ISSN)** Indicators undefined	0	0	**a** ISSN		
			1077-7199		
082 **Dewey No.** *Used by SCIS* **(R)** Repeatable Ind 1: Type of edition – for example: **0** Full edition Ind 2: Source of call no – for example: **4** SCIS	0	0	**a** Base Number	**b** Item Note	
			523.8	SMI	

100 **Personal name added entry (usually main author)** (**NR**) Non-Repeatable Ind 1: Type of personal name entry element – for example: **1** Surname Ind 2: Undefined	0	0	**a** Personal Name	q Qualifier (Full name)	b Roman numeral	d Dates	c Qualifier ®			
			Asimov, Isaac L.	**(Isaac Leo),**	**XV**	**1920-**	**Dr**			
245 **Title statement** (**NR**) Non-Repeatable Ind 1: Title added entry – for example: **0** No title added entry Ind 2: Non-Filing characters – for example: **4** Miss 4 characters when filing – ie: For the word "**The** "	0	4	**a** Title proper	**b** Other title information (remainder)	**h** Medium	**l** Parallel Title	**c** First Statement	**n** **Volume Number** (**R**)	**p** Volume Title (**R**)	**f** Second Statement
			The Quasars, pulsars, and black holes of space :	**a study**	**[sound recording]**	**Canto por las palams**	**/Isaac Asimov**	**Book 4**	**Taxonomy**	**Pictures by El Stymes.**
260 **Publication information** (NR) Non Repeatable Indicators undefined	0	0	**a** Place of Publication or Distribution (**R**)	**b** Name of publisher/ distributor (**R**)	**c** Date of Publication (**R**)					
			Sydney :	**Collins,**	**1988.**					
300 **Physical description** (**R**) Repeatable Indicators undefined	0	0	**a** Extent (**R**)	**b** Illustration Statement	**c** Size (**R**)	**e** Other material				
			38p. :	**Ill. (col.), maps. ;**	**13cm.**	**1 teacher's guide.**				
490 **Series statement** (**R**) Repeatable Ind 1: Undefined Ind 2: Non Filing characters – for example: **4** Miss 4 characters when filing – ie:For the word "**The "**	0	0	**a** Series Title	**x** ISSN	**v** Numbering					
			Isaac Asomov's library of the Universe	**0077-8923**	**No.34**					

500 **General Notes** (**R**) Repeatable Indicators undefined	0	0	**a** General Note								
			Includes glossary								
520 **Summary** (**R**) Repeatable Ind 1: Display constant controller e.g. 1 Review Ind 2: Undefined	0	0	**a** Summary Notes								
			Contains information on several of marine life. Keywords: fish, anemones, octopus, crayfish								
600 **Subject Heading (Personal name)** (**R**) Repeatable Ind 1: Type of personal name – for example: **1** Surname Ind 2: Source of Heading – for example: **0** Library of Congress	1	0	**a** Entry element	**q** Qualifier (full name)	**t** Title of a work	**c** Qualifier – Titles ass. (**R**)	**d** Dates	**v** Form Subdivision (**R**)	**x** General Subdivision (**R**)	**y** Period Subdivision (**R**)	**z** Place Subdivision (**R**)
			Leakey, L.S.B.	**(Louis Seymour Bazett)**	**Sea songs**	**King of France**	**1903-1972**	**Biography**	**Drama**	**To 1970**	**United States**
650 **Subject Heading (Topical)** (**R**) Repeatable Ind 1: Blank Ind 2: Source of Heading – for example: **0** Library of Congress			**a** Entry Element	**v** **Form Subdivision** (**R**)	**x** General subdivision (**R**)	**y** Period Subdivision (**R**)	**z** Place Subdivision (**R**)				
			Astronomy	**Dictionaries**	**Fiction**	**19th Century**	**Western Australia**				
651 **Subject Heading (Geographical)** (**R**) Repeatable Ind 1: Undefined Ind 2: Source of Heading – for example: **0** Library of Congress			**a** Entry Element	**v** Form Subdivision (**R**)	**x** Subject or Form subdivision (**R**)	**y** Period Subdivision (**R**)	**z** Place Subdivision (**R**)				
			Australia	**Dictionaries**	**History**	**1800-1899**	**Kimberley**				

700 **Personal Name (added entry)** **Usually other authors** (**R**) Repeatable Ind 1: Type of personal name entry element – for example: **1** Surname Ind 2: Type of added entry # No information provided			**a** Entry	**c** Additions to name (**R**)	**q** Fuller form	**d** Dates	**t** Title element
			Kick, M. A.	**Dr**	**(Marion Anne)**	**1901-1975-**	**Works**
856 **Electronic location and access** (**R**) Repeatable			**u** Uniform Resource Locator (URL)	**x** Descriptor			
			http://www.amlib.net	**Click here**			
945 **Item Area**			**a** *SL of WA* classification No Only present if different to Tag **99**	**b** *SL of WA* author Only present if different to Tag **99**	**f** *SL of WA* size prefix Only present if different to Tag **99**	**i** Item barcode	**p** Item price
			421.1	**BAL**	**QJ**	**ASLIB4417531B**	**$21.00**

Appendix 8: AOL Tags

COMMON TAGS AOL data	INDICATORS 1	 2	SUBFIELDS
001 **Control Number** assigned by the organisation creating or distributing the record			Contains no subfield codes – for example: SLofWA Innopac Number (8 characters) **1367061X**
955 **SL of WA AOL Number**			**a** AOL Number **9607**
956 **SL of WA Category**	0	0	a Category a NF; f AF; ,j JF; k JK; n JNF **f**
957 **SL of WA Format** Field definition and scope			**a** Format **b=**Book; **h**=Hardback; **p**=Paperback; **l**=Large Print; **c=**Cassette; **v**=VHS; **r**=CD-ROM; **s**=Serial; **n**=Newspaper; **m**=Microfiche; **u**=Map; **f**=Film; **i**=Infomat; **e**=Music Score **b**

Appendix 9: Some Useful MARC Resources

1. Especially for Librarians & Archivists Library of Congress Home Page: http://www.loc.gov/library/ and http://www.loc.gov/MARC/umb/
2. Ending Punctuation for MARC Tags Webpage: http://www.itcompany.com/inforetriever/punctuation.htm
3. SCIS Resource: http://www1.curriculum.edu.au/scis/managing/standards.htm
4. Education Dept: http://www.det.wa.edu.au/education/cmis/cat/class.htm
5. Comprehensive MARC Tag & Subfield list and information: http://www.itsmarc.com/crs/bib1468.htm