



USER DOCUMENTATION (ALEPHINO 4.1) TRAINING MATERIAL

Cataloging

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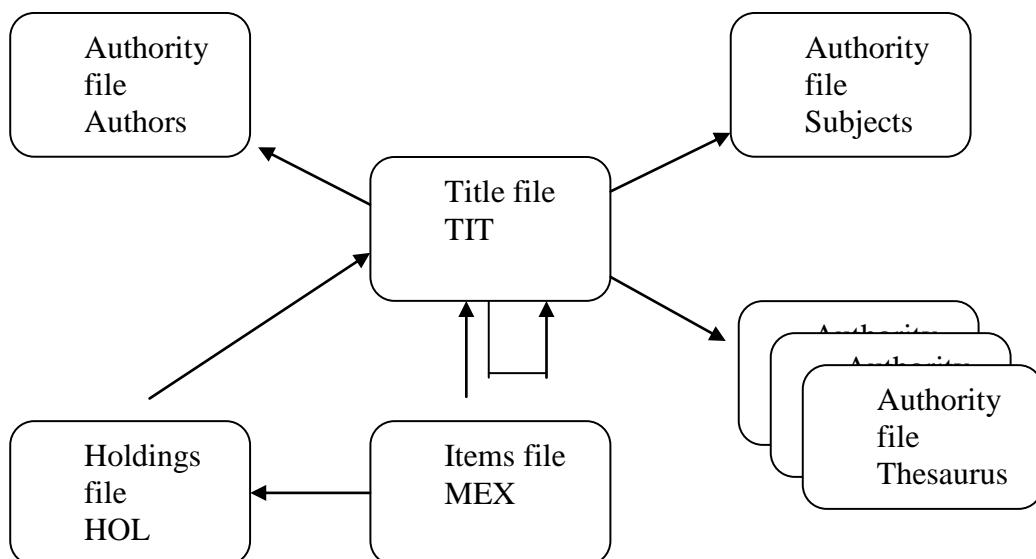
Introduction

1.1 Structure of the bibliographic data and the authority data

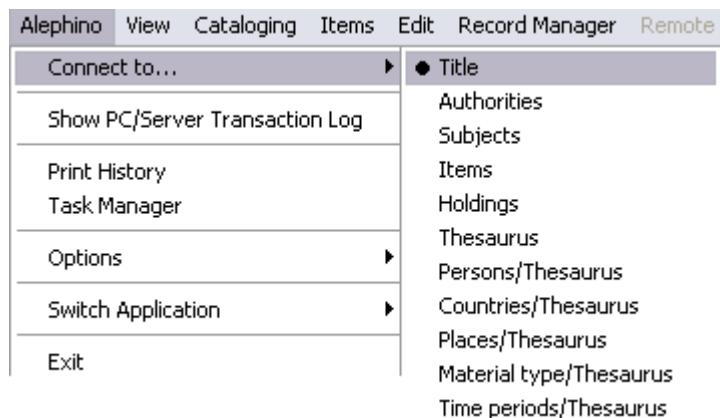
In Alephino the data is kept in so-called master files. There are the following master files:

TIT	(titles)
AUT	(authors)
MEX	(items)
SUB	(subjects)
CLA	(classification)
THS	(thesaurus)
PER	(persons/thesaurus)
ORT	(places/thesaurus)
LND	(countries/thesaurus)
MAT	(materials/thesaurus)
ZTR	(time periods/thesaurus)
HOL	(holdings)

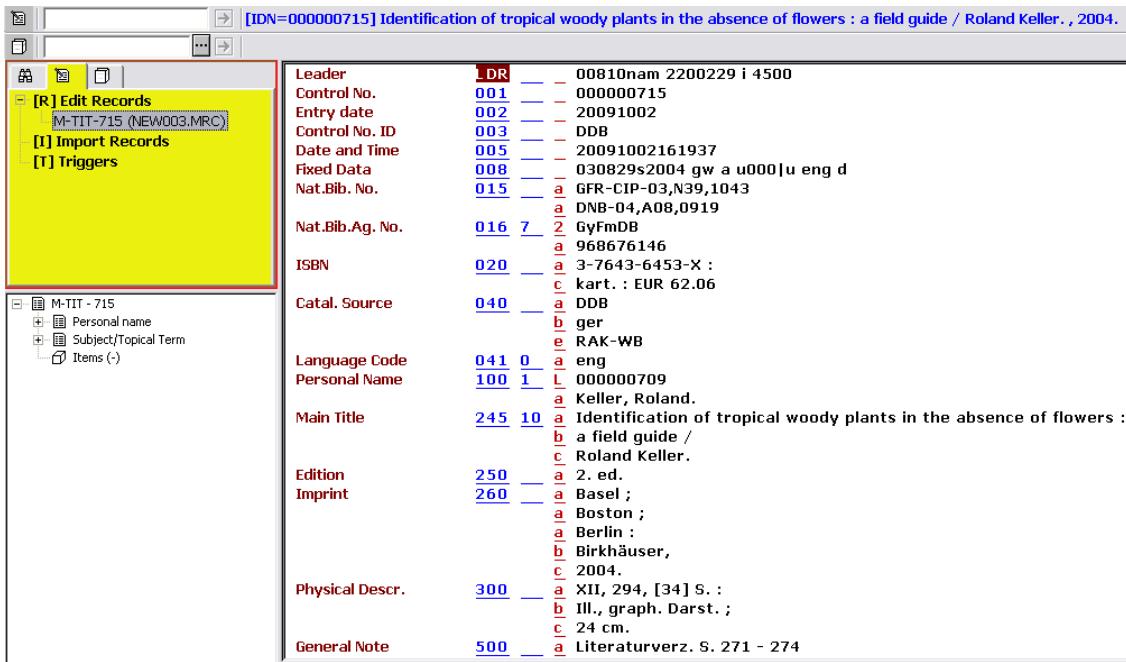
Each bibliographic record is identified by a unique system number which is automatically assigned by Alephino when you save a record on the server. Links to other records are based on this number (e.g. other title records, authorities, subjects). The linking structure is described in the chart belo. Starting from the bibliographic record links are build e.g. authority records or subject records. To create an authority record or a subject record, you need to connect to the corresponding master file. The cataloging functions are the same as in the titles master file.



You can connect to each file. When the cataloging module is started, you get automatically connected with the titles file. After activating the function **Connect** in the menu **Alephino**, the list of files will be displayed.



¶ The record



The screenshot shows a software interface for managing bibliographic records. The left pane is a tree view of the record structure:

- [R] Edit Records (highlighted)
- M-TIT-715 (NEW003.MRC)
- [I] Import Records
- [T] Triggers

Below this are collapsed sections for:

- M-TIT - 715
- Personal name
- Subject/Topical Term
- Items (-)

The right pane displays the record details:

Field Tag	Subfields	Value
Leader		00810nam 2200229 i 4500
Control No.	001	000000715
Entry date	002	20091002
Control No. ID	003	DDB
Date and Time	005	20091002161937
Fixed Data	008	030829s2004 gw a u000 u eng d
Nat.Bib. No.	015	GFR-CIP-03,N39,1043 a DNB-04,A08,0919
Nat.Bib.Ag. No.	016	7 2 GyFmDB a 968676146
ISBN	020	a 3-7643-6453-X : c kart. : EUR 62.06
Catal. Source	040	a DDB b ger e RAK-WB
Language Code	041	0 a eng
Personal Name	100	1 L 000000709 a Keller, Roland.
Main Title	245	10 a Identification of tropical woody plants in the absence of flowers : b a field guide / c Roland Keller.
Edition	250	1 a 2. ed.
Imprint	260	1 a Basel ; a Boston ; a Berlin : b Birkhäuser, c 2004.
Physical Descr.	300	1 a XII, 294, [34] s. : b Ill., graph. Darst. ; c 24 cm.
General Note	500	1 a Literaturverz. S. 271 - 274

The left frame shows the file where the record is located (M-TIT), the system number (715) and the temporary name on your local drive (normally NEWxxx.MRC).

Navigation in the record

Up/Down arrows	- moves up/down one line
Left/Right arrows	- moves left/right one space
Tab	- moves from field to field
PageUp	- moves up one page
PageDn	- moves down one page
Ctrl+Home	- moves to the beginning of the record
Ctrl+Down	- moves to the end of the record

2.1 Fields

On the left of the field name in the record window you find the tag of the input field. The tag consists of 3 digits and is shown in blue. Most of the fields are subdivided in several subfields, where you fill in the data (s.b.).

Edit fields

If you want to create or modify a bibliographic record, you may edit existing fields or add new fields. The fields work in „overwrite mode“. Simply put the cursor in the desired field and overwrite the old data with the new. Within the record you may copy, cut and paste .

Add fields

With **F5** or via the function **New field (choose from list)** in the menu **Edit** you may add a new field from a list. The list contains all available fields. Select the desired field via mouse click. You can jump to a specific point in the list by entering the first digit of the tag.

With **F6** or via the function **New field (user-defined)** in the menu **Edit** you may add a new user-defined field. In the record a new line opens (where the cursor is located). When filling in the tag, the field name appears automatically.

Delete fields

To delete fields use **CTRL+F5** or select the function **Delete ... Delete field** in the menu **Edit**.

2.1.1 Forms for fields

With **CTRL+F** or via the function **Open form** in the menu **Edit**, for fields with a fixed format, a form opens. This formular is available e.g. for the fields 006 (material characteristics), 007 (physical description) and 008 (control field).

2.1.2 Link fields

These fields are used to link a record to records from other files: e.g. a bibliographic record is linked with an authority record via field 100. Link fields consists at least of a subfield a and a subfield L. The link can be created via both fields. Subfield a contains the main title (in case of a title-title link) resp. the heading of the linked record (in case of a title-authority link), while subfield L contains the system number of the linked record.

In Subfield a of link field you can retrieve the browse list of the linked field with **F3** resp. **Strg+F3** or via the function **Search field headings of current library** resp. **other library** in the menu **Search**. When selecting an entry from the list, both the system number and the title resp. the heading is taken over into the current record. This way, the link is always definite. Using the browse list is optional but highly recommended, particularly when linking with authority records. After an authority has been created in the authority master file, the record is available in the browse list. For more detailed information see chapter 2.6

In the table below you will find all link fields in the bibliographic record.

Bibliographic record	Link field	Note
title -> title	other title (par): LKR part title -> series (hier.): BIB analytical work -> source (hier.): BIB	please note subfield b = volume enumeration
title -> persons	first person: 100 resp. 700 further persons: 700	Please note subfield e = relator term for other involved persons
title -> corporate bodies	first corporate body: 110 resp. 710 further corporate bodies: 710	
title -> meetings	first meeting: 111 resp. 711 further meetings: 711	
title -> subjects	subject (person): 600 subject (corporate body): 610 subject (meeting): 611 subject (uniform title): 630 subject (topical term): 650 subject (geographical term): 651	
title -> thesaurus	THS (repeatable)	Only for thesaurus
title -> thesaurus (persons)	PE1 (repeatable) PE2 (repeatable) PE3 (repeatable)	Only for thesaurus
title -> thesaurus (places)	ORT (repeatable)	Only for thesaurus
title -> thesaurus (countries)	LND(repeatable)	Only for thesaurus
title -> thesaurus (material)	MAT (repeatable)	Only for thesaurus
title -> thesaurus	ZTR (repeatable)	Only for thesaurus

(time
period)

2.1.3 URLs in MARC21 – external link

Via the field 856 you may link the bibliographic record with a relevant external file or program.

Put e.g. the URL of a relevant web site in 856 subfield u: <http://www.exlibrisgroup.com>.

The link can then be called up in the full view of the title record in the Search module (make sure that the correct path of your browser is defined in the file ..//SEARCH/TAB/SEAR.INI under the parameter "htm").

But the field 856 can also be used for a link with a file on a local drive or on a network drive. To do so, fill in the complete path and file name in subfield u, e.g. C:/Images/image.gif.

2.2 Title-title links

To link e.g. a part title to a series, special fields are used. Please proceed as follows:

First, create the bibliographic record for the series (record format **SE**). When saving the record on the server, Alephino assign as the system number.

Leader	LDR	-----nam--22-----u-4500
Control No.	001	000015739
Entry date	002	20100506
Date and Time	005	20100506103328
Fixed Data	008	100506s1000-----r----000-0-eng-d
Main Title	245 00	a Series with many part titles
Imprint	260	a Hamburg b Ex Libris c 2009
Language (008)	LNG	eng

Then, create the bibliographic record for the part (record format **BK**) and link the record to the series via the field BIB.

Fill in the following information in the field:

BIB \$\$a title of the series
 \$\$b volume number
 \$\$L system number of the series bibliographic record

Leader	LDR	-----nam--22-----u-4500
Control No.	001	000015740
Entry date	002	20100506
Date and Time	005	20100506103654
Fixed Data	008	100506s1000-----r----000-0-eng-d
Personal Name	100 1	L 000000173 a Abdai, Viktoria.
Main Title	245 10	a Title of part
Imprint	260	a Hamburg b Ex Libris c 2009 L 15739
Link to BIB	BIB	a Series with many part titles b vol. 1
Language (008)	LNG	eng

In the Search module you can now retrieve the part title by hightlighting the field **BIB/Downlink** in the full view of the series and then click the button **Link** and you can also retrieve the series by highlighting the field **BIB/Uplink** in the full view of the part title and and then click the button **Link**.

1. Full format (Cataloging)		2. Field format (Cataloging)	3. ISBD format
SYSID	000015740		
Control no. / ID	000015740		
Latest transaction	05/06/2010		
Personal name	Abdai, Viktoria.		
Main Title	Title of part		
Imprint	Hamburg Ex Libris 2009		
BIB/Uplink	[000015739] Series with many part titles		

1. Full format (Cataloging)		2. Field format (Cataloging)	3. ISBD format
SYSID	000015739		
Control no. / ID	000015739		
Latest transaction	05/06/2010		
Main Title	Series with many part titles		
Imprint	Hamburg Ex Libris 2009		
BIB/Downlink	1		

To link parts of a multi-volume work with the main title, create first the main title (record format BK). Then create the parts and link them to the main title as described above.

The copies of the part titles should be linked to the part titles: push part title to the Items module and create them.

2.3 Indicators

In some fields you can put insert indicators to specify the field content more clearly. There may be one or two indicators. The indicators are blue and on the right of the field tag, which is also blue.

To find out which indicators are available, simply read the help on the field via **F2** or function **Help on field** in the menu **Edit**.

2.4 Subfields

Most fields are subdivided in several subfields. Each subfield is used for a specific content. The subfields are red and on the right of the indicators. In some cases, the subfields are repeatable. Please look for this information in the help of the field.

Example: field 245 (main title):

subfield a = title
subfield b = remainder of the title
subfield c = statement of responsibility
etc.

245 \$a The charity ball :
 \$b a comedy in four acts /
 \$c by David Belasco and Henry C. DeMille.

If you want to modify a subfield code, overwrite it.

If you want to add a new subfield, use **F7** or select the function **New subfield** in the menu **Edit**. To find out which subfields are available, look at the help of the field.

If you want to delete a subfield, use **CTRL+F7** or select the function **Delete ... Delete subfield** in the menu **Edit**.

2.5 Field contents

The field contents work in „insert mode“.

To delete a single character, use the delete key (not the space bar). To delete a group of characters, select the text, then use the delete key or the space bar. You may select text to be deleted or copied by pressing the left mouse button and dragging the mouse cursor over the desired text.

To copy text use **CTRL+C** or select the function **Copy ... Copy** from the menu **Edit**.
To paste text use **CTRL+V** or select the function **Paste ... Paste** from the menu **Edit**.

2.6 Search field headings (F3 resp. Ctrl+F3)

With this function you may take over data from browse lists (e.g. authorities, subject) of the current library or of another master file. A browse list is available in all link fields.

To select an entry from a browse list, proceed as follows:

Place the cursor on the tag of the desired field or on the content area, e.g. field 100, subfield a. Enter the beginning of the main title resp. the heading that you want to link with.

For a title-title link use **F3** or select the function **Search field headings of current library** in the menu **Search**.

For a title-authority link or a title-subject link use **Strg+F3** or select the function **Search field headings of other library** in the menu **Search**.

A browse list opens, starting one entry before the text that you filled in in subfield a of the link field. Highlight the desired entry and click the button **OK**. The heading resp. the main title and the system number will be copied to the subfields a and L of your current record.



With the button **Jump to**, you can go to a different point in the list.

With the button **Expand** you can view the browse list entry in full view.

In case of an authority browse list, with the button **View Docs** you can see which titles are currently linked to the highlighted authority record.

2.7 Tag information

With **F2** or the function **Help on field** in the menu **Edit** you can retrieve the help on the current field. The help information on the formal structure of the field, how many times it is repeatable and which indicators and subfields are available.

100 MAIN ENTRY--PERSONAL NAME (NR)

Indicators

First Type of personal name entry element

0 Forename

1 Surname

2 Multiple surname OBSOLETE

3 Family name

Second Undefined; contains a blank (#)

Subfield Codes

\$a Personal name (NR)

\$b Numeration (NR)

\$c Titles and other words associated with a name (R)

\$d Dates associated with a name (NR)

\$e Relator term (R)

\$f Date of a work (NR)

\$g Miscellaneous information (NR)

\$j Attribution qualifier (R)

\$k Form subheading (R)

\$l Language of a work (NR)

\$n Number of part/section of a work (R)

>List Cataloging process

3.1 Create new records

Before creating a new record you should first search your database to make sure that the record does not exist yet.

Records can be created with the help of so-called templates or you can use an already existing record as a model. For this, the menu **File** provides the functions

Open template

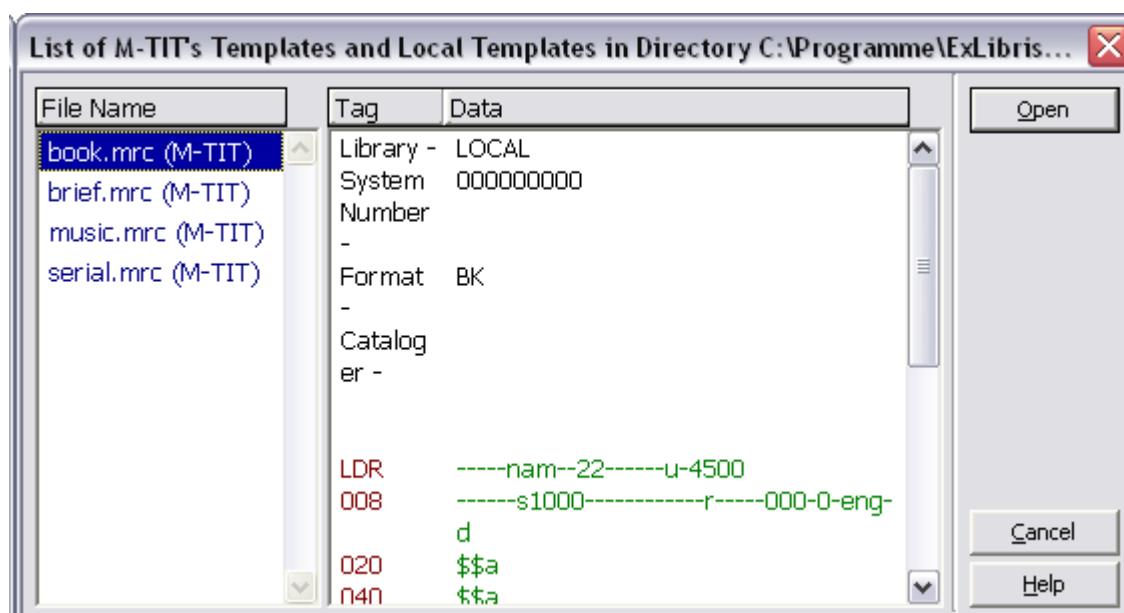
Duplicate record

If you are an experienced cataloger who knows the 3-digit field tags, you can also use the function **New record**.

3.1.1 Open template

Templates are pre-defined forms which contain selected fields. The template can be located on the server where it is available for all catalogers. You can also create local templates which will only be available on your PC.

With the button  or via the function **Open template** in the menu **Cataloging** you get a list of pre-defined templates. Select your desired template by highlighting it and then click **Open**.



3.1.2 Duplicate record

You can duplicate an existing record to use it as base for a new record (e.g. for the new edition of a title). Retrieve the record which you want to duplicate in the Search module and navigate it to the Cataloging module. Then select the function **Duplicate record** in

the menu **File** or press **CTRL+N**. The system will ask you in which master file the record should be duplicated. You can now edit the new record and then save it. To make sure that you edit the duplicate and not the original, check if the record has a system number:



Duplicate record (NEW...)
Original record (System no.)

The duplicate does not have a system number because it has not been saved on the server yet.

3.2 Edit / correct record

There are three ways to retrieve a record in the Cataloging module to edit it:

search record in Search module and navigate it to Cataloging;
load record from server;
open record on local drive.

3.2.1 Navigate record from Search module to Cataloging

Retrieve the record in the Search module. Display the record in full view. Then navigate it to Cataloging either by clicking the button in the menu bar or via the navigation map.

A screenshot of the Alephino Cataloging software showing a record in full format. The left pane displays the record details in a table format. The right pane shows navigation buttons: '<<' and '>>', 'Locate', 'Show Like', 'Headings', 'External', 'Link', 'Item List', 'Cataloging' (which is highlighted with a red box), and 'Items'.

1. Full format (Cataloging)	2. Field format (Cataloging)	3. ISBD format
SYSID Control no. / ID Latest transaction Cataloging source Language code Geograph. area code Time period code Personal name Main Title Imprint Physical description General note	0000000092 000000092 10/02/2009 Cataloging agency: AR-FUNDACION ESPIGAS spa AR 1977 Bértola, Elena de, intr. De Marziani : pinturas 1976-1977 Buenos Aires : Art Gallery International , 1977 desplegable : 4 il. 1 fot. del artista (blanco y negro) 22,5 cm. Fecha de exposición: 6 al 25 de junio 1977	1/5 << >> Locate Show Like Headings External Link Item List Cataloging Items

3.2.2 Load record from server

If you know the system number of the record that you want to edit, enter the system no. in the input field for the first search bar. Then, click on the arrow button or press **Enter**.

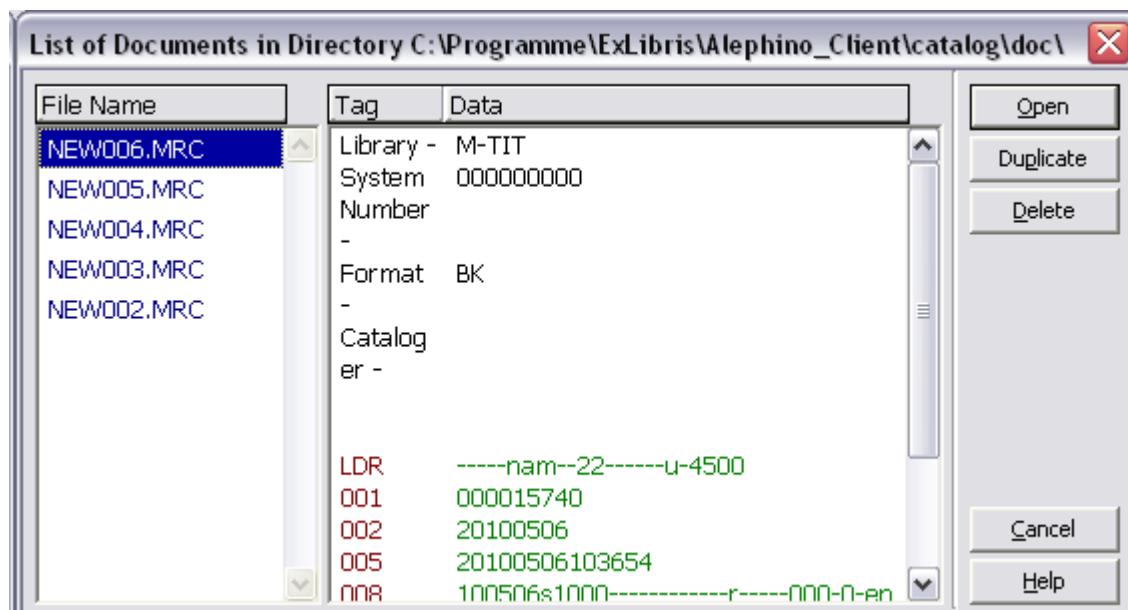


3.2.3 Open record on local drive

When editing a record the system automatically saves it on the local drive. You can also explicitly save a record locally. These local records can be opened via the Cataloging menu, or select the function **Open record on local drive**.



A window will be displayed which lists all local records:



Click **Duplicate** if you want to use the record as base for a new record.
Click **Open** if you want to edit the record.

3.3 Save record



With the button or via **F1** or via the function **Save on server and local drive** in the menu **Cataloging**, records will be saved on the server. Each record will also be saved locally on your PC.

When you save a new bibliographic record, the following message appears:



When you click **Continue**, the record will be saved on the server and locally. The system assigns a system number and an ID number (field 001).

The box „Change cataloguer level“ is not relevant in Alephino.

Before the record is saved, the system performs plausibility checks and a duplicate check (s.b.).



Via the button the new bibliographic record will be displayed in full view in the Search mode.

3.3.1 Save on local drive

Next to the saving on the server you can also explicitly save a record only locally (= on your PC), e.g. when the cataloguing has not been completed and you want to continue with the record later. To save the currently active bibliographic record on your PC, select the function **Save on local drive** in the menu **Cataloging**.

The records are saved in the directory `../catalog/doc` of your client installation under the name `NEWnnn.MRC`.

3.3.2 Save all on local drive

You can also save all records which are currently opened in the Cataloguing module via the function **Save all on local drive** in the menu **Cataloguing**.

3.3.3 Check routines

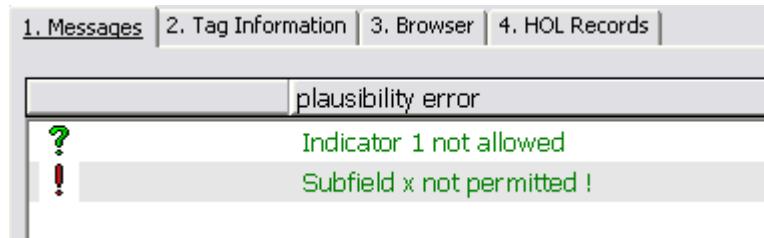
When saving a record, the system performs several check routines:

Plausibility checks

In Alephino there are two different forms of plausibility checks:

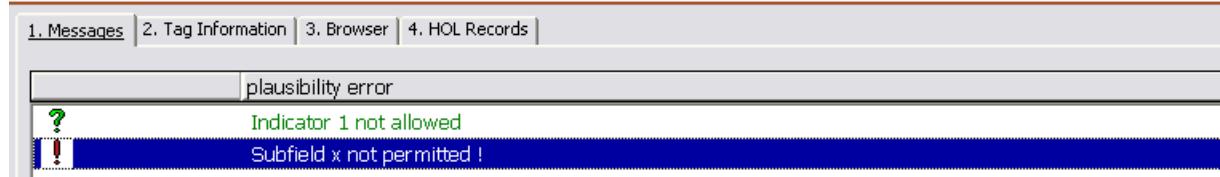
formal checks, e.g. „Subfield x not permitted“. These error messages are marked with a red exclamation mark. The record can only be saved after the error has been corrected.

plausibility checks, e.g. „Indicator 1 not allowed“. These error messages are marked with a green question mark. The error message can be ignored and the record still be saved.



When you then click **Cancel**, the following window appears:

Language Code	<u>041</u> <u>0</u>	<u>a</u> eng
Personal Name	<u>100</u> <u>1</u>	<u>L</u> 000000709 <u>a</u> Keller, Roland.
Main Title	<u>245</u> <u>10</u>	<u>a</u> Identification of tropical woody plants in the absence of flowers : <u>b</u> a field guide / <u>c</u> Roland Keller.
Edition	<u>250</u>	<u>a</u> 2. ed.
Imprint	<u>260</u> <u>1</u>	<u>a</u> Basel ; <u>a</u> Boston ; <u>a</u> Berlin : <u>b</u> Birkhäuser, <u>c</u> 2004.
Physical Descr.	<u>300</u>	<u>a</u> XII, 294, [34] S. : <u>b</u> Ill., graph. Darst. ; <u>c</u> 24 cm.
General Note	<u>500</u>	<u>x</u> Literaturverz. S. 271 - 274
Subj. Top.term	<u>650</u> <u>7</u>	<u>x</u> SWD <u>a</u> Tropischer Wald <u>x</u> Zweikeimblättrige <u>x</u> Kryptogamen



In the record, the field to which the highlighted error refers, is marked red or green, depending on the type of error (s.a.).

You can also initiate these checks without saving the record by clicking the button or **CTRL+U** or via the function **Check record** in the menu **Edit**.

Duplicate checks

Alephino checks if there are duplicate records in the title file by looking for the following fields:

various non-regional control numbers like e.g. 010, 016, 020
ISBN/ISSN/ISMN/ISRC

main title

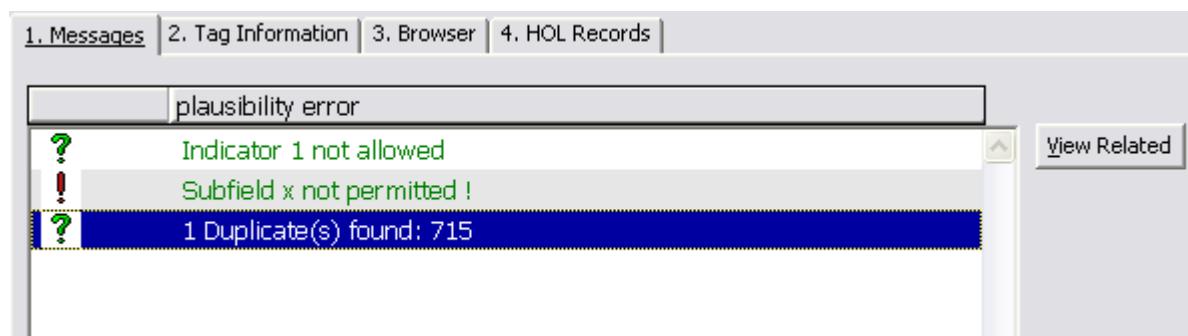
personal name

corporate name

meeting name

publication year

If a duplicate is found, the following message appears:



To find out if the record is identical click on the function **View Related** that is displayed next to the message. The duplicate records will be loaded into Cataloging. If these are duplicates, go back to the new record and cancel the saving. If these are not duplicates, override the duplicate warning and save the new record.

3.4 Delete record

If you want to delete a record which has been saved on the server, select the function **Delete ... Delete record from server** in the menu **Edit**. The system checks if there are linked records for that record. E.g. a title can't be deleted if there are linked item records. In that case, the item records must be deleted first. The system number of a deleted record is not re-assigned.

If you want to delete all local records, select the function **Delete New* records** in the menu **Edit**. If there is a New* record that you want to keep, rename it first via the function **Rename on local drive** in the same menu.

3.5 Lock record

You can lock a record while editing it to prevent that changes on this record from other colleagues are saved on the server. Only records with a system number can be locked. To lock your currently active record, select the function **Lock record** in the menu **Cataloging**. The record is locked immediately without any further message.

Effects

If you lock a record, other cataloguers can still load, view and edit the record. Only their changes will not be saved on the server while the record is locked.

After you saved your changes on the server, the record will be automatically unlocked but other cataloguers cannot save their changes on the server.

If you unlock the record without saving your changes on the server via the function **Unlock record** in the menu **Cataloging**, another cataloguer can save his changes on the server after the record has been unlocked.

Automatic unlock

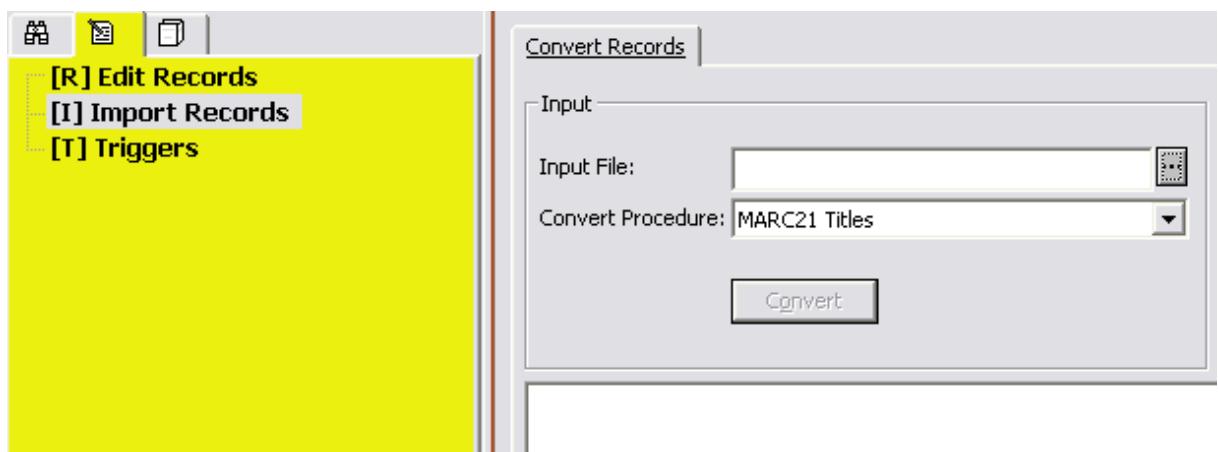
Under the following conditions the record will be automatically unlocked:

Once you save a locked record on the server, the record is automatically unlocked;
The record is automatically unlocked after a period of 20 minutes from the time you lock it.

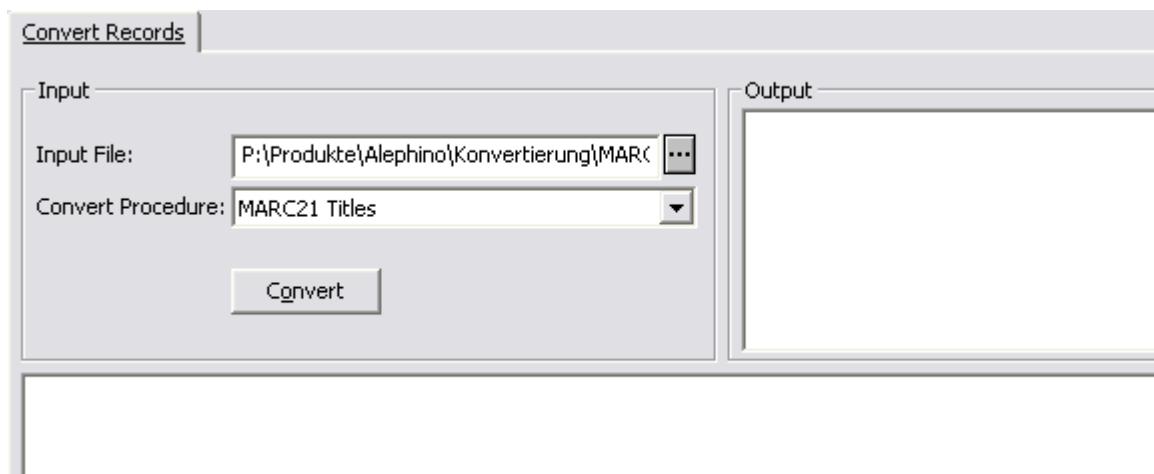
If a locked record is used to create a template (via the function **Create template on local drive** in the menu **File**), the record will be automatically unlocked.

3.6 Import records

You can convert external bibliographic records into Alephino format via the function **Import records**. Select this function from the navigation frame.



To select the input file, click on the button next to the input field that is called 'Input file:'.



Select drive, directory and name of the file with the record that you want to convert and click **Convert**.

The file will be converted and a list of the converted records will be displayed in the middle part of the window. The content of the currently active record appears in the lower part of the window. To edit a record, highlight it in the middle part of the window and click **Edit**. The record is then displayed in the Cataloging module ready for editing.

The screenshot shows the Alephino Cataloging software interface. The top section, 'Convert Records', has an 'Input' panel with 'Input File' set to 'P:\Produkte\Alephino\Konvertierung\MARC...' and 'Convert Procedure' set to 'MARC21 Titles'. A 'Convert' button is below. The 'Output' panel shows a list of converted records, with the first one selected: 'marc.txt.06110346' (06-05-10, 11:03). A 'Remove' button is to the right. Below the output list, a list of titles is shown: 'Manuel de Falla :', 'Tipper Gore :', 'Careless love :', 'The International Sweethearts of Rhythm :', 'Mariah Carey revisited :', and 'Music of the common tongue :'. The bottom section, 'Record Info.', displays detailed bibliographic information for the selected record. The 'Library' is listed as 'M-TIT', 'System Number' as '000000000', and 'Format' as 'Cataloger'. The 'LDR' and 'Data' sections show the following MARC data:

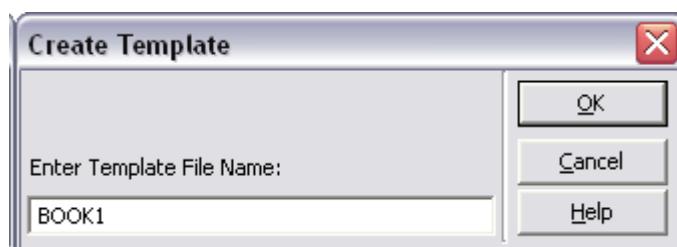
LDR 01102pam 2200289 a 4500
001 726648
005 19990920090932.0
008 980612s1998 ctua bk 001 0 eng
010 \$\$a 98028638
020 \$\$a0313302928 (alk. paper)
040 \$\$aDLC\$\$cDLC\$\$dDLC
05000 \$\$aML134.F18\$\$bH37 1998
08200 \$\$a780/.92\$\$221
1001 \$\$aHarper, Nancy Lee.
24510 \$\$aManuel de Falla :\$\$ba bio-bibliography /\$\$cb by Nancy Lee Harper.
260 \$\$aWestport, Conn. ;\$\$bGreenwood Press,\$\$c1998.
300 \$\$a280 p. ;\$\$bill. ;\$\$c24 cm.
440 0 \$\$abio-bibliographies in music,\$\$x0742-6968 ;\$\$vno. 68
504 \$\$aIncludes discography (p. [219]-232) and index.
60010 \$\$aFalla, Manuel de,\$\$d1876-1946\$\$xBibliography.
60010 \$\$aFalla, Manuel de,\$\$d1876-1946\$\$xDiscography.

Creating templates

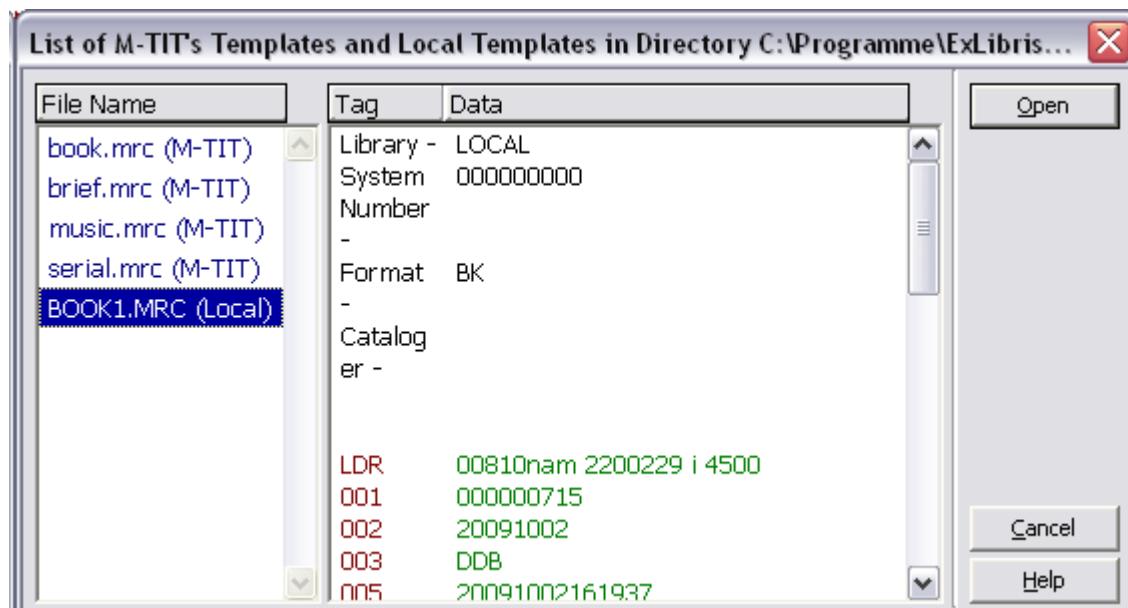
Each cataloger can create local templates for his own specific needs. These templates can then be selected from the list of templates. Templates can contain empty fields and fields with a default content.

To create a template, proceed as if you were creating a new record. Note that you should put the fields in the order that you want them to appear in the template. The system does not sort the fields when saving the template.

When you are finished, select the function **Create template on local drive** in the menu Cataloging. The following window will be displayed:



Enter here a name for your template and then click **OK**. You can now call up your template from the list of templates at any time:



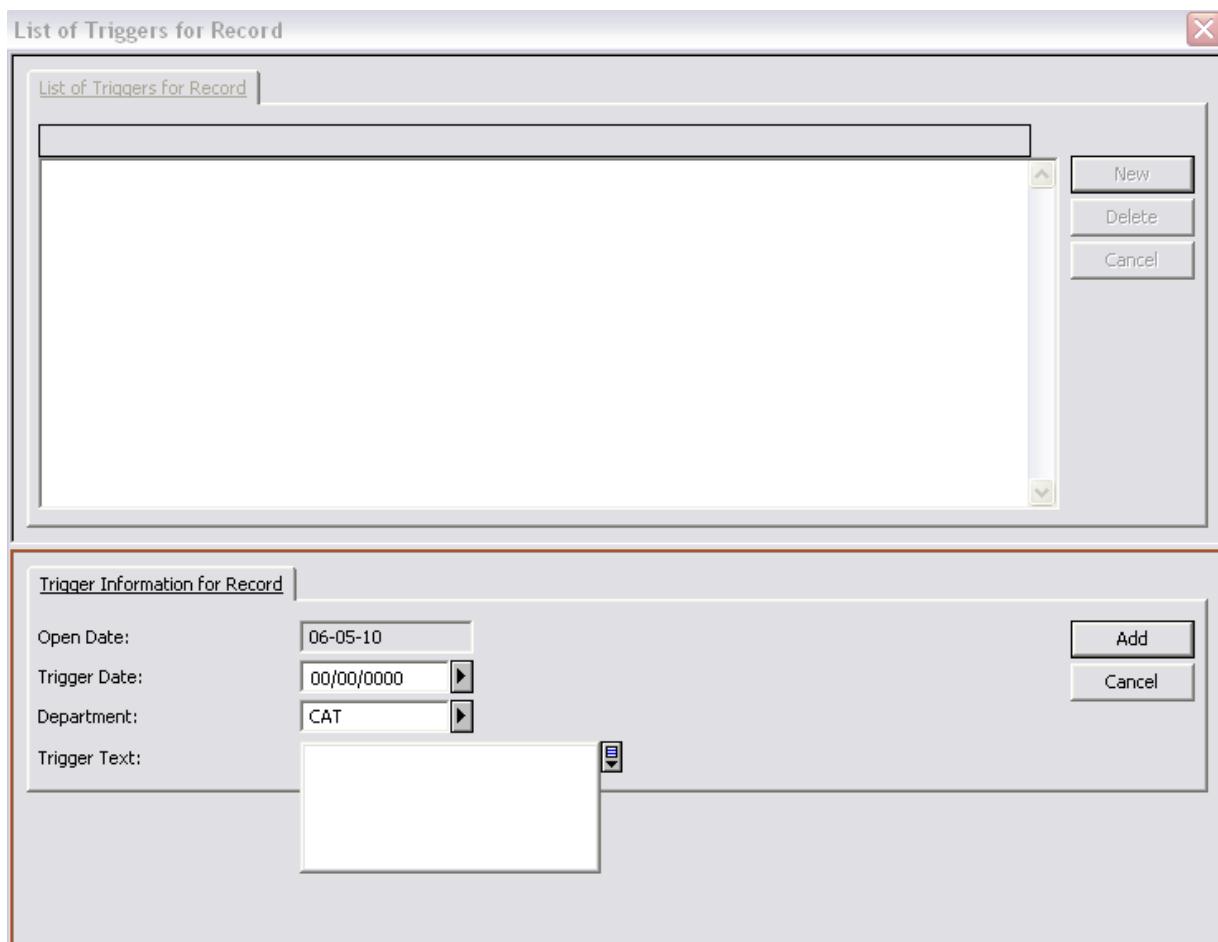
If you want to modify a template, select it from the list, edit it and then save it under the same name. The old template will be overwritten with the new template.

■ Triggers

Triggers can be created per record and are used

to attach a message for another department/library, e.g. „record corrected“
to retrieve the error messages and warnings which have automatically been saved by the system

To create trigger select the function **Record's triggers** in the menu **Edit**. A list will be displayed of all existing triggers for the record. Via the button **New** you can create a new trigger. You may specify a department.



To retrieve a trigger select the function **Retrieve triggers** in the menu **Alephino**. This function is available in the Acquisitions and Circulation module.



Enter the period and optionally also a department, then click **Go**.

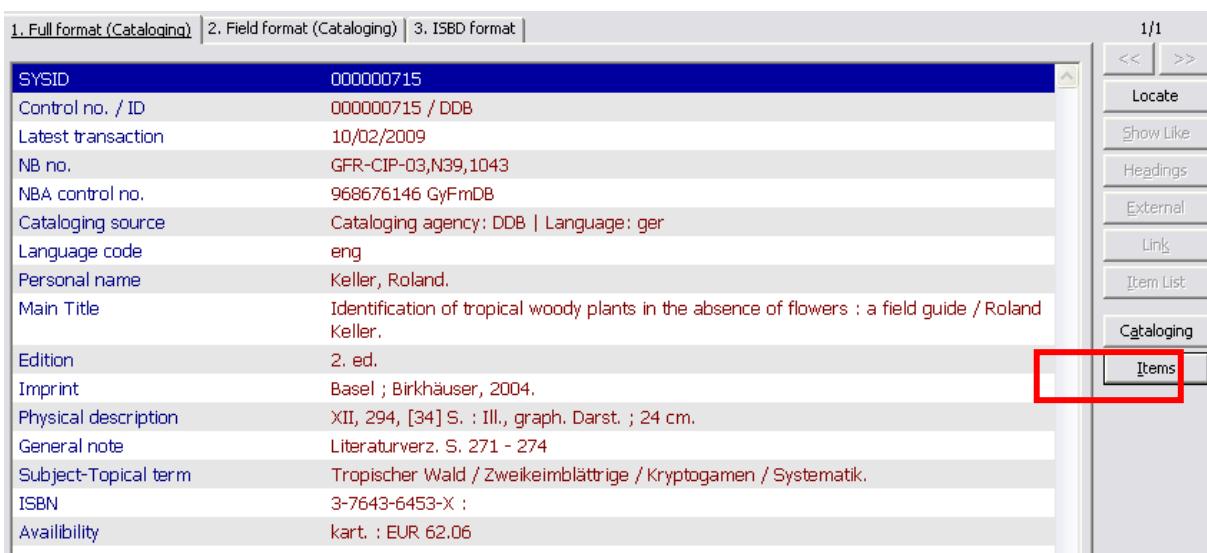
A screenshot of a window titled 'Trigger List'. The window contains a 'Trigger List' tab and a 'Filter' section. The 'Filter' section includes fields for 'Days Before Today' (set to 2), 'Days After Today' (set to 2), and a 'Department' dropdown. Below the filter is a table with columns: Date, IDN, Dep., and Text. The table currently has no data rows.

⌚ Items

6.1 Create item records

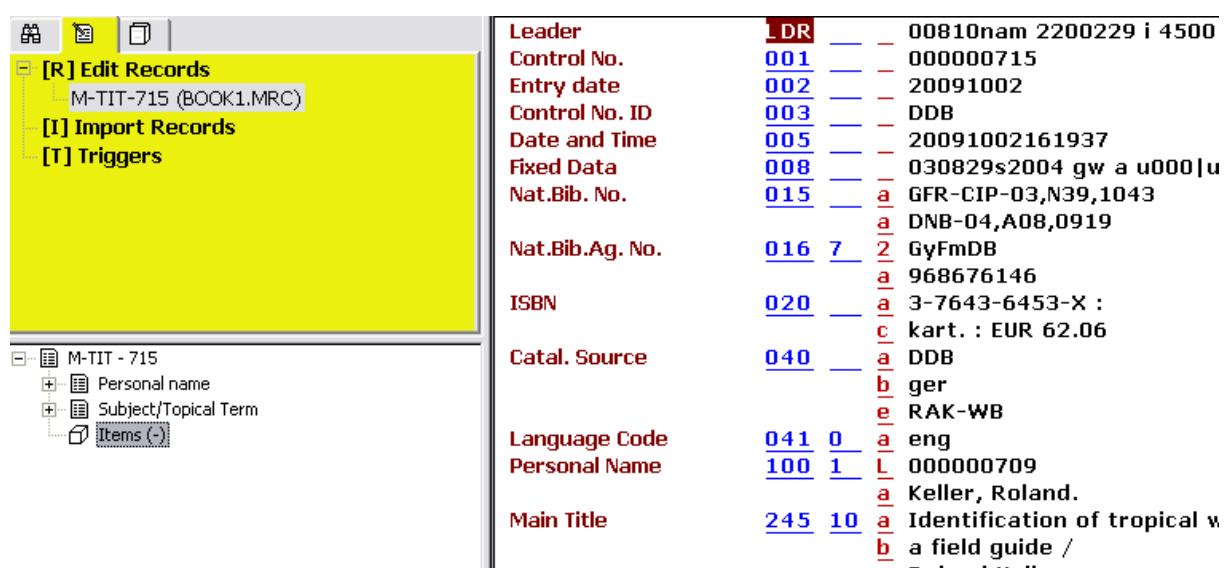
To create item records, retrieve the bibliographic record for which you want to create an item record either in the Cataloging module or in the Search module and then navigate it to the Items module:

Search module: retrieve the title and then click the button **Items** (either in the full view or in the brief list). In the navigation window then click the button **Items**.



The screenshot shows a cataloging record for a book. The record includes fields such as SYSID, Control no. / ID, Latest transaction, NB no., NBA control no., Cataloging source, Language code, Personal name, Main Title, Edition, Imprint, Physical description, General note, Subject-Topical term, ISBN, and Availability. On the right side, there is a navigation bar with buttons for Cataloging, Item List, and Items. The 'Items' button is highlighted with a red box.

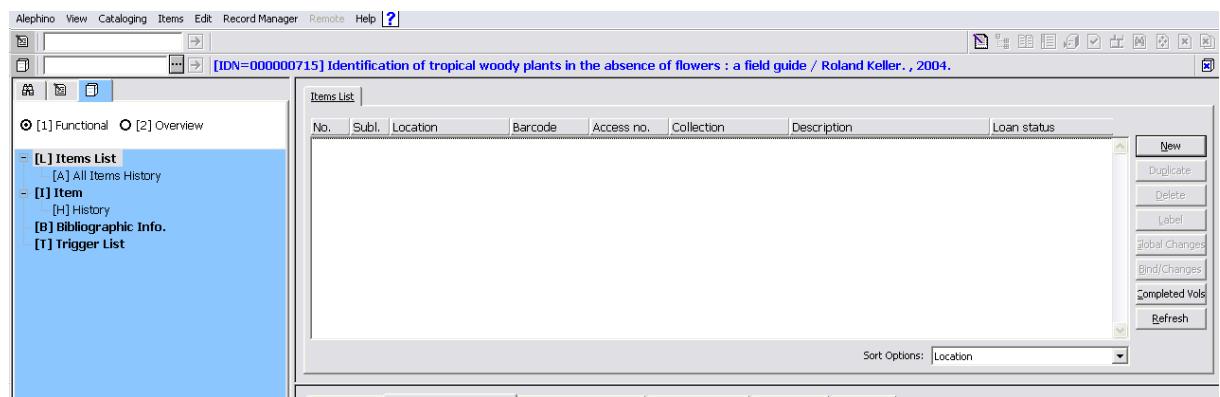
Cataloging module: retrieve the record and then double-click on Items in the Record Manager.



The screenshot shows the Record Manager with a tree view on the left. The 'Items' node under 'M-TIT-715' is selected and highlighted in yellow. On the right, a detailed view of the bibliographic record is shown with various fields and their corresponding data values.

Leader	1 DR	00810nam 2200229 i 4500
Control No.	001	000000715
Entry date	002	20091002
Control No. ID	003	DDB
Date and Time	005	20091002161937
Fixed Data	008	030829s2004 gw a u000 u
Nat.Bib. No.	015	a GFR-CIP-03,N39,1043 a DNB-04,A08,0919
Nat.Bib.Ag. No.	016	7 2 GyFmDB a 968676146
ISBN	020	a 3-7643-6453-X : c kart. : EUR 62.06
Catal. Source	040	a DDB b ger e RAK-WB
Language Code	041	0 a eng
Personal Name	100	1 L 000000709 a Keller, Roland.
Main Title	245	10 a Identification of tropical w b a field guide /

In the Items module, the item list opens:



To create a new item record, click the button **New**. The item form will be displayed in the lower pane which consists of 4 parts (General information (1), General information (2), Serial information, Serial levels).

For some of the fields you can activate a drop-down menu by clicking on .

Barcode: In this field you fill in the barcode of the item. You can enter the barcode manually via the keyboard or use your barcode reader to scan it in.

Sublibrary: Here, you assign the item to a sublibrary. You may choose the sub-library from the drop-down menu. Please note that you can only create or modify items if you have the corresponding privileges for the sublibrary.

Collection: Your library may designate special collections such as Closed stacks. You may choose from a list of collections that are valid for the selected sub-library by clicking on the button to the right of the field.

Copy Number: The Copy Number field is optional. It can be used when performing Global Changes.

Material type: Choose the material type from the drop-down menu.

HOL Link: This field is used to link the item record to a holding record. This field cannot be filled manually. It is filled automatically by the system with the system number of the holdings record if a link has been created via the function **Retrieve HOL** in the item list.

Location type - Location: Location Type - Location Note that there are two sets of Location type-Location. In most instances it is expected that a library will use the first set only. However, the second set is available for libraries that have a double-location for items, one location for open stack/reading room, and the other for the closed stack. If this is the case, the first location should be used for the closed stack, and the second location for the open shelf.

Location type: The Location Type is the method your library will use to arrange this item on the shelf. This field is optional.

Location: This is an alphanumeric code that identifies the shelf location of the item. You may assign a location by typing in text or choosing a location number pattern from a drop-down menu to activate an automatic counter. In that case, the system will automatically assign a location as soon as you click the Update button.

Description: This field is used to display information on the item which is of local importance. This may be the bibliography on which the item should appear or a note from the cataloger. To separate multiple entries in this field use a blank or another character. For serial items, this field contains the issue description, e.g. vol. 1 (2004), no. 4. If you use the Serials module, this field is filled in automatically

Item status: The whole circulation process is based on the item status (e.g. calculation of due dates, limits, fines or delinquencies). These parameters are defined by the library for each item status.

Item Process Status: This field describes the item's current process status.

Enum. Level (A) Volume: This information is intended for the volume of a serial item. If you use the Serials module, the volume is filled in automatically from the issue record.

Enum. Level (B): When managing multiple subscriptions, each serial item is automatically assigned to a subscription. If you use the Serials module, this field is filled in automatically. Otherwise, the field remains empty.

1. Item Display		2. General Information (1)		3. General Information (2)		4. Serial Information		5. Serial Levels		6. HOL Links	
Inventory Number:	<input type="text"/>	Statistic:	<input type="text"/>	<input type="button" value="..."/>		<input type="button" value="..."/>		<input type="button" value="..."/>		<input type="button" value="..."/>	
Inventory Date:	<input type="text" value="00/00/0000"/>	<input type="button" value="..."/>								<input type="button" value="Add"/>	
Last Invent. Report D	<input type="text" value="00/00/0000"/>	<input type="button" value="..."/>	Open Date:	<input type="text" value="06-05-10"/>						<input type="button" value="Save Defaults"/>	
Price:	<input type="text"/>	<input type="button" value="..."/>	Update Date:	<input type="text" value="06-05-10"/>						<input type="button" value="Refresh"/>	
OPAC Note:	<input type="text"/>										<input type="button" value="..."/>
Circ. Note:	<input type="text"/>										<input type="button" value="..."/>
Internal Note:	<input type="text"/>										<input type="button" value="..."/>
Order Number:	<input type="text"/>										<input type="button" value="..."/>
Invoice Key:	<input type="text"/>										<input type="button" value="..."/>
Invoice Note:	<input type="text"/>										<input type="button" value="..."/>

Inventory number: This information is optional. Depending on how your system administrator has set up the Items module, you may type in a number or choose an

inventory number pattern pattern from a drop-down menu to activate an automatic counter. In this case, the system will automatically assign an inventory number as soon as you click the Update button.

Inventory date: This is the date on which the Inventory Number is assigned. If you leave this field blank and enter an Inventory Number, the system will automatically fill in the Inventory Date when you click the Update button.

Last Inventory Report Date: Not implemented.

Price: If the item is created in the Acquisitions process, the price is computed by the system, using information that was entered in the Order form and dividing the local price by the number of units. If the price is modified, or if the item record was created at a different time, the price must be manually reported.

OPAC note: This information is optional. The text entered here will appear in the OPAC for the borrower to read.

Circ. note: This information is optional. The text entered here may be displayed when an item is loaned or returned (if the Circulation module's setup options have been defined to display this note).

Internal note: This information is optional. The text entered here will appear only on this form and is intended for library staff only.

Order Number: this information is optional. It is the **Order Number** as it appears in the Acquisitions record. In order to fill this field, click the **List** button to the right of the field to invoke the **Order Index List**, and then select the relevant line.

Invoice Key: this information is optional. The **Invoice Key** includes details that are assigned to the order number quoted in the **Order Number** field. These details are: vendor code; general invoice number; and invoice line item sequence number. In order to fill this field, use the **List** button to the right of the field to invoke the **Invoice List for Order Number** window, and then select the relevant line.

Invoice Note: read-only field. If you filled in the **Invoice Key** field, the **Invoice Line Item** note will be displayed here.

Statistic: This information is optional. You can enter here the statistic groups (e.g. the subject groups of the DBS) or information such as the department or collection for which the item was purchased.

Open date: The Open Date is the date the item record was created. It is set automatically by the system and cannot be updated.

Update date: The Update Date is the date the item record was last modified. It is set automatically by the system and cannot be updated manually.

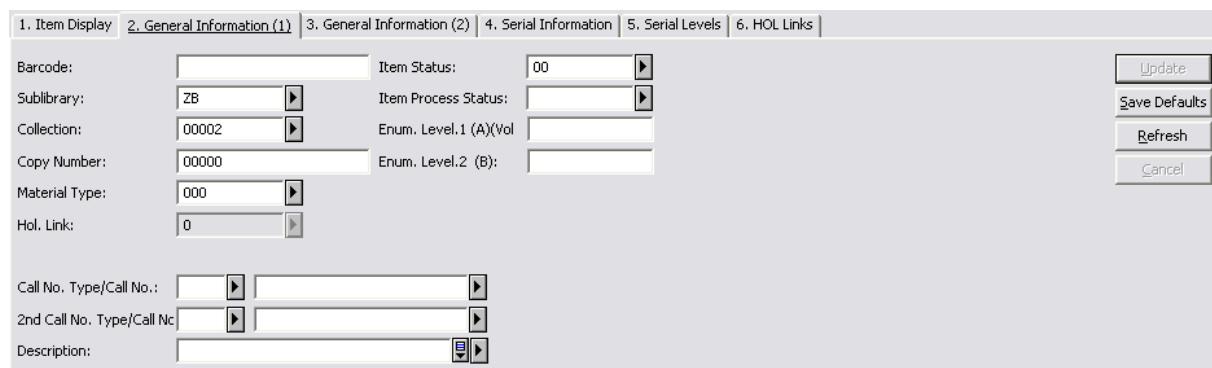
The fields on the "serials information" tab will not be explained here as they are only relevant in connection with the Serials module and need not be filled manually.

Create holding records

Holding records are only necessary for library participating in a consortium, e.g. for local subject terms, serial holdings etc. A holding record can be created in the Items module or in the Cataloging module.

7.1 Create a holding record in the Items module

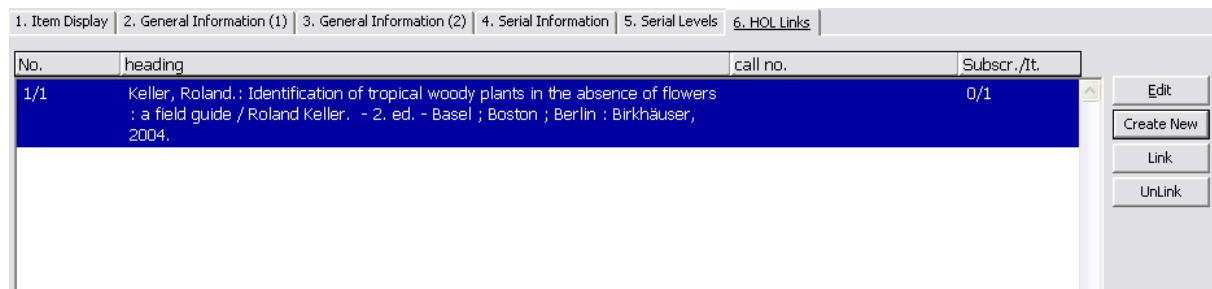
After you created an items record in the Items module, you can retrieve resp. create a new holding record via the tab **HOL Links** that appears in the Item form.



1. Item Display | 2. General Information (1) | 3. General Information (2) | 4. Serial Information | 5. Serial Levels | 6. HOL Links

Barcode:	<input type="text"/>	Item Status:	<input type="text"/> 00	<input type="button" value=""/>
Sublibrary:	<input type="text"/> ZB	Item Process Status:	<input type="text"/>	<input type="button" value=""/>
Collection:	<input type="text"/> 00002	Enum. Level.1 (A)/Vol:	<input type="text"/>	<input type="button" value=""/>
Copy Number:	<input type="text"/> 00000	Enum. Level.2 (B):	<input type="text"/>	<input type="button" value=""/>
Material Type:	<input type="text"/> 000			<input type="button" value=""/>
Hol. Link:	<input type="text"/> 0			<input type="button" value=""/>
Call No. Type/Call No.:	<input type="text"/>	<input type="button" value=""/>	<input type="text"/>	<input type="button" value=""/>
2nd Call No. Type/Call No.:	<input type="text"/>	<input type="button" value=""/>	<input type="text"/>	<input type="button" value=""/>
Description:	<input type="text"/>			

Here, you can click on **Create new** to create a new holdings record. An empty holding record with information on the local library has been automatically created. To add further information to your holding record, click on the button **Edit**. The holding record will be displayed in the Cataloging module for editing.



1. Item Display | 2. General Information (1) | 3. General Information (2) | 4. Serial Information | 5. Serial Levels | 6. HOL Links

No.	heading	call no.	Subscr./It.
1/1	Keller, Roland.: Identification of tropical woody plants in the absence of flowers : a field guide / Roland Keller. - 2. ed. - Basel ; Boston ; Berlin : Birkhäuser, 2004.	0/1	

7.2 Create a holding record in the Cataloging module

In Cataloging module retrieve the title. Then click on the fourth Tab called 'HOL Records'. A holdings record will be created automatically. To add further information to your holding record, click on the button **Edit**. The holding record will be displayed in the Cataloging module for editing.

Leader **LDR** 00810nam 2200229 i 4500
Control No. **001** 000000715
Entry date **002** 20091002
Control No. ID **003** DDB
Date and Time **005** 20091002161937
Fixed Data **008** 030829s2004 gw a u000|u eng d
Nat.Bib. No. **015** a GFR-CIP-03,N39,1043
a DNB-04,A08,0919
Nat.Bib.Ag. No. **016** 7 2 GyFmDB
a 968676146
ISBN **020** a 3-7643-6453-X :
c kart. : EUR 62.06
Catal. Source **040** a DDB
b ger
e RAK-WB
Language Code **041** 0 a eng
Personal Name **100** 1 L 000000709
a Keller, Roland.
Main Title **245** 10 a Identification of tropical woody plants in the absence of flowers :
b a field guide /
c Roland Keller.
Edition **250** a 2. ed.

[1. Messages](#) | [2. Tag Information](#) | [3. Browser](#) | [4. HOL Records](#) |

HOL Library **M-HOL**

No.	heading	call no.	Subscr./It.	
1/1	Keller, Roland.: Identification of tropical woody plants in the absence of flowers : a field guide / Roland Keller. - 2. ed. - Basel ; Boston ; Berlin : Birkhäuser, 2004.		0/1	Edit Create

⌚ Appendix A: Functions in the menu “EDIT”

Function	Hotkey	Description
Undo	Ctrl+Z	Enables you to undo your last keystroke. For each previous keystroke that you want to undo, activate the Undo function again.
Redo	Ctrl+Y	Enables you to reverse an Undo action (which in many cases means to put back what you took away).
Open form	Ctrl+F	Opens a form that enables you to edit the contents of a field. If no form is available, the system will open the sub-field(s) for you to edit directly in the catalog record.
Expand from template	Ctrl+E	Adds fields and sub-fields from a template to your current record.
Help on field	F2	Provides a guide to the use of valid indicators and sub-field codes
Locate similar record	none	Finds a record in another database that is similar to the one currently being edited.
Record's triggers	none	A trigger is a reminder to perform a task related to the record. This function enables you to view, add and delete triggers from the Cataloging module that relate to the record currently being edited. These triggers may include messages produced by the system, regarding errors found when the Check Record function was used.
Change record's format	none	Changing the record's format will also change the forms (for entering field data) and the checks that are performed on the record.
New field (choose from list)	F5	Enables you to add a new field by choosing from a list of fields
New field (user-defined)	F6	Lets you add a field whose tag, indicator and subfields you may define by yourself
New sub-field	F7	Opens a new sub-field below the current sub-field
Copy	Ctrl+C	Copies highlighted text into the clipboard
Copy sub-field	Ctrl+S	Copies the current sub-field into the Windows clipboard. Both the sub-field code and contents will be copied.
Copy field	Ctrl+T	Copies the current field into the Windows clipboard. The tag, indicator, sub-field codes and the contents will all be copied.

Copy record	Ctrl+D	Copies the entire contents of the current record into the Windows clipboard. Used with Paste Record, this option can be used to merge records.
Paste	Ctrl+V	Inserts the copied field below the current field. The field's tag, indicator, letters of the sub-fields and the contents will all be pasted.
Paste sub-field	Alt+S	Inserts the copied subfield below the current sub-field. Both the sub-field code and the contents will be pasted.
Paste field	Alt+T	Inserts the copied field below the current field. The field's tag, indicator, letters of the sub-fields and the contents will all be pasted.
Paste record	Alt+D	Paste the entire contents of the copied record into the current record. Duplicated fields will appear one after the other. This option can be used to merge records.
Delete sub-field	Ctrl+F7	<p>You have the option of deleting only the contents of the current sub-field, or both the sub-field code and the contents. You can control which is deleted by the placement of the cursor. To delete only the contents of the sub-field, place the cursor anywhere in the contents. To delete both the sub-field code and the contents, place the cursor on the sub-field code.</p> <p>Note that if only an "a" sub-field remains, you will be able to delete its contents, but not the letter "a" (even if the cursor is on the sub-field code). If any other sub-field is the only remaining sub-field, for example, only a "c" sub-field remains, you may delete both the sub-field code and its contents. In their place, an "a" sub-field with empty contents will be displayed.</p>
Delete field	Ctrl+F5	Deletes the current field. To delete a field, place the cursor anywhere in the desired field (on the tag, the indicator, the code of any sub-field, or the contents of any sub-field).
Delete record from server	None	The record will not actually be deleted, but all fields except the LDR field will be removed. In addition, all links from the record to the OPAC indexes will also be removed.
Check field	Ctrl+W	<p>For the current field, this function:</p> <ul style="list-style-type: none"> checks that the indicators and/or sub-field codes are valid for the tag checks that mandatory sub-fields are present checks that non-repeatable sub-fields are not repeated checks dependencies between the selected field and other fields in the record
Check record	None	Checks the current record to ensure that:

		the indicators and/or sub-field codes are valid for the tag required fields and sub-fields are present non-repeatable fields and sub-fields are not repeated all dependent fields are present
Sort record	None	Sorts the fields of the current record according to the order defined in the Alephino table of codes. However, within the 5xx, 6xx and 7xx groups of fields, the order of the fields remains as they were entered by the cataloger.
Fix record	None	Automatically fixes the current record according to standard library-defined procedures which make changes such as:

⌚ Appendix B: MARC21 tags

Segment	Description
001 - 008	Control fields
010 - 048	Number and Code Fields
050 - 088	Classification and Call Number Fields
100 - 130	Main Entry Fields
210 - 247	Title and Title-Related Fields
250 - 270	Edition, Imprint, etc. Fields
300 - 362	Physical Description, etc. Fields
400 - 490	Series Statement Fields
500 - 535	Note Fields (Part I)
536 - 599	Note Fields (Part II)
600 - 658	Subject Access Fields
700-754	Added Entry Fields
760 - 787	Linking Entry Fields
800 - 830	Series Added Entry Fields
841 - 887	Holdings, Location, Alternate Graphics, etc. Fields

For further information see

<http://lcweb.loc.gov/marc/marcdocz.html>



Hands-on exercises

Duplicate a record which you retrieved in the Search module and save it with a different edition and a different year of publication.

What is the purpose of the system number of a record?

Which fields are used to link common title and part title?

Create an own template for cataloging a monograph. Include those fields which you often use in your daily work: do you e.g. need input fields for classifications? Should there be a 2nd personal name? Do you want to fill certain fields with default contents, e.g. a publishing place and/or a publisher name?