ALEPH 500, VERSION 17

Cataloging Basic Module Navigation
Web Training

September 2006
Table of Contents

PURPOSE OF THE BASIC CATALOGING MODULE NAVIGATION WEB TRAINING................................................................. 3
STRUCTURE OF THIS DOCUMENT................................................................. 3
PRIMARY MODULES TO USE IN VIEWING CATALOGING DATA...........3
HOW TO VIEW IN THE CATALOGING MODULE............................................3
HOW TO VIEW CONVERTED DATA IN THE CATALOGING MODULE
  HOW TO FIND AND VIEW BIBLIOGRAPHIC DATA................................... 4
  SYSTEM NUMBER.................................................................................. 4
  KEYWORD SEARCH................................................................................ 5
  BROWSE SEARCH................................................................................. 7
  SHOW RECORD....................................................................................... 9
  “PUSH” BIB RECORD..............................................................................10
  PIECES OF THE CATALOGING MODULE..................................................11
HOW TO VIEW RECORD IN THE WEB OPAC...........................................13
HOW TO FIND AND VIEW HOLDINGS DATA..............................................13
HOW TO FIND AND VIEW ADMINISTRATIVE DATA....................................17
HOW TO FIND AND VIEW ITEM DATA.....................................................19
  2 WAYS TO SEARCH FOR THE ITEM RECORD...................................... 19
  ITEM BAR................................................................................................ 23
  CLEAR AN ITEM.................................................................................... 23
  ITEM LIST............................................................................................... 23
  ITEM DISPLAY........................................................................................ 24
  ITEM TABS.............................................................................................. 24
EXIT ............................................................................................................. 26
Purpose of this Basic Cataloging Module Navigation Web Training

- To learn how to navigate version 17 Cataloging Module in the GUI Client
- To outline how to view converted data within the functional module
- To point out specific fields of possible concern
- To report errors to the PALS office

This document/session is not intended to provide full training for using the functional module.
- An “Advanced Cataloging Module Web Training” is scheduled later where you will learn more about the functional use and new features in version 17.

- Use the “Getting Around the ALEPH Desktop – Introduction to version 17, ALEPH GUI Client, August 2006” powerpoint document for help in opening, closing and moving around in the ALEPH modules. This powerpoint document is found on the PALS eDesk http://pals.custhelp.com. Search for Knowledge Base answer number 3049.

Structure of this Document
- Primary Modules to be used
- What to look for
- How to get there

Primary Modules to use in viewing Cataloging data
- Cataloging Module

What to view in the Cataloging Module
- Bibliographic records
- Holdings records
- Administrative records
- Item records
How to View Converted Data in the Cataloging Module

How to Find and View Bibliographic Data

In the Cataloging Module; Connect to the SYS01 Library

Or, right click on the (Library) icon in the Operations Bar which is found on the bottom right of your screen. From this list you can connect to the SYS01 library (database):

You can retrieve a record that is located on the server by entering the system number of the record on the System Number field of the Cataloging bar.
And by choosing Bib System Number in the field below

If you do **not** know the system number of the record you want, you may retrieve it by using the Search function.

**Search (F9)**

Within the Cataloging Module, you can use the Search function. When in a module, click on F9 to do a Search.

OR ...

Click on the Search icon to open the **Search Tree** window; e.g. [F] Find, [B] Browse, [H] Show.

[F] Find is a Keyword Search

Click on the [F] Find node or do a Ctrl+Alt+F when in the Search mode.

In order to perform an **Advanced Keyword Search (Tab1)** search in a designated library (or database) for items using the following fields, choose the ‘base’ and up to 3 keyword indexes can be Boolean searched by ‘and’, ‘or’, ‘not’
CCL (Tab2) search in a designated library/base or multiple bases

Multi-field Search (Tab3) in a designated library (or database) for items using the following fields:
[B] Browse Search

Click on the Search icon tab \(\text{Browse}\) to open the *Search Tree* window, then choose [B] Browse or do a Ctrl+Alt+B

**Browse – Include Expanded AUT Data.** Displays additional authority information together with the heading
### Browse – Include BIB/HOL data

Select this option to change the browse list formatting, so that it will display: the heading, the title and main entry from the bibliographic record, and holdings (location) information from the Holdings record. It can be particularly useful for displaying holdings in a call number browse list. **NOTE:** This option should be selected only for headings lists in which each heading is linked to a small number of bibliographic records (for example, call number, title). When activated on a list that has many records linked to a single heading, a Failed to read reply (timeout) message displays.
**[H] Show**

Click on [H] to Show or Ctrl+Alt+H to display the highlighted record.

The highlighted record in the upper pane will display in the lower pane in any of 4 view; e.g. Full + Link, MARC Tags, Public View (Web full record), or Citation.
“PUSH” Bib record to Cataloging

Click on the button in the top pane or click on the button in the lower pane.
Bib record in Cataloging Module

Pieces of the Cataloging Window

Main Tab (Cataloging Module):

- The record icon or F2 will open the Navigation Tree of the Cataloging Module. This allows you access to cataloging functions of the module for a BIB, HOLding or ADMinistrative record.
- The item record icon or F8 will open the Item Tree.
- The binoculars icon or F9 will perform a Find or Browse search.
Navigation Tree (Cataloging Module): 1) Edit Records: The highlighted record is seen in the middle, upper pane which is called the ‘Catalog editor’, 2) Import Records, 3) Triggers

Record Manager: displays information regarding the record currently being edited in the Catalog Editor (upper pane of the Cataloging tab).

Catalog Editor: This pane displays the cataloging record in editing format. Through the catalog editor the user can create, modify and delete cataloging records.
How to VIEW record in WebOPAC

The **Browser** tab displays the record in the Web OPAC format. To view the record in the WebOPAC you can:
- choose the **Cataloging** dropdown menu/View in WebOPAC or do a **Ctrl+O**

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How to Find and View Holdings Data

The **HOL Records** tab lists the holdings records linked to the record displayed in the Catalog Editor.
To load a holdings record, **highlight** the selected record from the list and click **Edit**.
The record is loaded and displayed in the Catalog Editor for you to view.

1. The Holding System number is displayed in the **cataloging record bar**.

2. The highlighted record in the **Navigation Tree** is displayed in the **Catalog Editor** window.

The **Holdings Record** window contains the linker (L.KR) to the Bibliographic Record.  
- Be sure the LKR $b$ is the correct ALEPH bib system number.  
- Be sure the 852 tagfield - Location (Library, Sub-library, Collection and Call Number) are correct.
A Bibliographic record may have several linked Holdings Records, one per location.

The following is a **Serial Bibliographic Record**:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>MARC Field</td>
<td>001</td>
</tr>
<tr>
<td>Control No.</td>
<td>005</td>
</tr>
<tr>
<td>Date and Time</td>
<td>007</td>
</tr>
<tr>
<td>Phys.Descr.</td>
<td>008</td>
</tr>
<tr>
<td>Fixed Data</td>
<td>010</td>
</tr>
<tr>
<td>LC Control No.</td>
<td>022</td>
</tr>
<tr>
<td>ISSN</td>
<td>035, 3511759</td>
</tr>
<tr>
<td>System No.</td>
<td>035, 3511759</td>
</tr>
<tr>
<td>Catalog Source</td>
<td>040, OKO, PIT, DLC, NL, MNI</td>
</tr>
<tr>
<td>Authent. Code</td>
<td>042, lc</td>
</tr>
<tr>
<td>Local Holdings</td>
<td>049, MINE</td>
</tr>
<tr>
<td>Local Call No.</td>
<td>090, GV561, .5733</td>
</tr>
<tr>
<td>Local Call No.</td>
<td>092, x</td>
</tr>
<tr>
<td>Key Title</td>
<td>222, Sports Illustrated</td>
</tr>
<tr>
<td>Main Title</td>
<td>245, Sports Illustrated [microform]</td>
</tr>
<tr>
<td>Imprint</td>
<td>260, [Chicago : Time, Inc.], 1954-</td>
</tr>
<tr>
<td>Physical Des.</td>
<td>300, v. ; ill. ; 30 cm.</td>
</tr>
<tr>
<td>Current Fre.</td>
<td>310, Weekly</td>
</tr>
<tr>
<td>General Note</td>
<td>500, Title from cover.</td>
</tr>
<tr>
<td>Citation Note</td>
<td>510, Biography index</td>
</tr>
</tbody>
</table>
The following is the **Serial Holding Record**

<table>
<thead>
<tr>
<th>Leader</th>
<th>000nx^^a22^^1n^4500</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>005 20040203140756.0</td>
</tr>
<tr>
<td>Fixed Data</td>
<td>008 0402032u^^8^^4001cueng0040203</td>
</tr>
<tr>
<td>Link</td>
<td>LKR a HOL SYS01 001834037</td>
</tr>
<tr>
<td>Location</td>
<td>852 b MnWSinS</td>
</tr>
<tr>
<td></td>
<td>c WSU</td>
</tr>
<tr>
<td></td>
<td>dB PERIODICALS</td>
</tr>
<tr>
<td>Capt. Bib.Unit</td>
<td>853 c v.</td>
</tr>
<tr>
<td></td>
<td>i (year)</td>
</tr>
<tr>
<td></td>
<td>j (month)</td>
</tr>
<tr>
<td>Capt. Bib.Unit</td>
<td>853 X i</td>
</tr>
<tr>
<td></td>
<td>j 1996</td>
</tr>
<tr>
<td></td>
<td>j 1-6</td>
</tr>
<tr>
<td></td>
<td>j 19960903</td>
</tr>
<tr>
<td>Capt. Bib.Unit</td>
<td>853 Z i</td>
</tr>
<tr>
<td></td>
<td>v1YM6, vB4Y1996M1-6</td>
</tr>
</tbody>
</table>

“Acquisitions/Serials Basic Module Navigation Web Training” will cover information on Holdings Records as they pertain to Serials, especially the prediction pattern (853 and 853X) fields.

### How to Find and View Administrative Data

It may not be necessary in your situation, but if you need to view the **Administrative Record**, be sure the relevant Bibliographic Record is active (e.g. you have a BIB record open and see the BIB record data in the right-hand upper pane).
In order to see the ADM record, you need to double-click on the Record Tab in the Navigation Tree. If it’s highlighted in the Navigation Tree/Root [R] Edit Records any SYS01 record, the BIB record will appear in the Catalog Editor (upper pane).

In the Record Manager, highlight and double-click the ADM record; e.g. WSU50 - 2905827
The **Administrative Record** will then be displayed in the right-hand upper pane. The Administrative Record contains the **LKR** field; this is the link between the Bibliographic Record and the Administrative Record. This link enables you to connect to Administrative non-MARC records, so that you can create orders, link vendors and also link serial prediction patterns.

- Check that LKR $b is the correct ALEPH bib system number.

Converted data that was not mapped directly from the PALS system to the ALEPH system (i.e is not placed in with the BIB records or the HOL records) may have been placed in the ADM records according to the conversion specifications. Some Serial Notes were placed in the ADM record. They were: Receive note to 961 $a, Binding note to 963 $a, Decision note to 964 $a, Series note to 491 $a, Routing note to 965 $a, Claiming note to 966 $a; and Missing note to 967 $a.

### How to Find and View Item Data

#### 2 ways to find the Item Record

1. If you have the bib record visible in the Catalog Editor, in the Record Manager expand the Administrative Record by clicking on the plus (+).

   ![Diagram of how to find item data]  

   The item record will appear. Double click the word 'Items'.
The left pane will be the **Item Tree**

[L] **Items List** - The Items List displays all items associated with a bibliographic record and enables access to various items functions. The upper pane is the **Items List**. If there are multiple item records, the first one in the sequence will be highlighted.

[A] **All Items History** – The [A] node displays the history of all the items in the list.

[I] **Item** - The Item root displays details regarding a specific item.

[H] **History** - The History node displays this item’s history for loans, hold requests, and item changes.

[S] **Circ Summary** - The Circ Summary node displays this item’s current and historical circulation summary.

[B] **Bibliographic Info.** - The Bibliographic Info node displays bibliographic details.
The upper pane is the **Items List**. If there are multiple item records, the first one in the sequence will be highlighted.

The lower pane is the **Item Information**.

2. To view the item information for a bibliographic record; click on the Item Icon in the Main Tab.

Enter a BIB system number, ADM system number, Barcode, or Call number.
OR …

click on the icon to get the following Item List by Call Number window:

Highlight a call number on the list and hit SELECT
Item Bar

The Item bar contains brief information about a selected item, such as BIB system number, ADM system number, title and author.

Clear an Item

Click the Clear Item icon to clear the loaded item and empty the item tree and its panes.

Items List

The Items list will display in the upper right-hand pane:

If there were multiple items, to view an individual item, double click or highlight the record to see the Item Display in the lower right-hand pane:
The lower pane has six tabs.

Review the **1.Item Display** tab for data such as *Sub-library, Collection, Call No., and Item Status* to be sure it converted correctly.

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
</table>
| 1. Item Display | Item Display (Item Sequence) 2005827 1.0  
Item Sublibrary: WSU Main Library  
Item Collection: Main Collection  
Item Call No.: G330 .E36 2004  
Item Call No. 2  
Item Description  
Item Status: Books  
Item Process Status: Not in process  
Item Barcode: 30106060443990  
Item Copy No.  
Last return date |

Use the **2nd General Information** tab to further check for Barcode number, Call Number Type, Sublibrary, Call Number, Collection, Copy Number, Material Type, Item Status, HOL record number (Hol. Link)

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
</table>
| 2. General Information (1) | Barcode: 30106060443990  
Sublibrary: WSU  
Collections: M31N  
Copy Number:  
Material Type: BOOK  
Hol. Link: 3010620  
ISS Type/Linking Number:  
Call No. Type/Call No.: G330 .E36 2004  
2nd Call No. Type/Call No.:  
Descriptions: |

Look at the **3rd General Information** tab to make sure the *Search (Web OPAC), Circ., and Internal notes* correctly converted.
### Serial Information

4. **Serial Information** is the first of two Serial Information tabs. Verify the *Description* and *Arrival (receipt) Date*, if individual serial records were converted:

```plaintext
<table>
<thead>
<tr>
<th>Schedule:</th>
<th>0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subscription No.:</td>
<td></td>
</tr>
<tr>
<td>Pages:</td>
<td></td>
</tr>
<tr>
<td>Description:</td>
<td>x,100 (Apr.-June 1975)</td>
</tr>
<tr>
<td>Issue Date:</td>
<td>09/01/2000</td>
</tr>
<tr>
<td>Exp. Arrival Date:</td>
<td>09/01/2000</td>
</tr>
<tr>
<td>Arrival Date:</td>
<td>09/05/2000</td>
</tr>
<tr>
<td>Gift Indicator:</td>
<td></td>
</tr>
</tbody>
</table>
```
5. **Serial Levels** contain the *Enumeration* and *Chronology* information (based on the MARC 21 Format for Holdings Data) that control the item sort, along with the Material Type, on Tab 2, must be “ISSUE”

<table>
<thead>
<tr>
<th>Enum. Level 1 (A) (Vol.)</th>
<th>Chron. Level 1 (Y/Year)</th>
<th>1999</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enum. Level 2 (B)</td>
<td>Chron. Level 2 (Y)</td>
<td></td>
</tr>
<tr>
<td>Enum. Level 3 (C)</td>
<td>Chron. Level 3 (L)</td>
<td></td>
</tr>
<tr>
<td>Enum. Level 4 (D)</td>
<td>Chron. Level 4 (L)</td>
<td></td>
</tr>
<tr>
<td>Enum. Level 5 (E)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enum. Level 6 (F)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The **6. HOL Links** tab is used to link the item record to a holdings record. Check to see the Holding Record column has the correct Holding record number. To see the Holding Record, click on the **EDIT** button.

**EXIT the Cataloging Module**

To Exit the Cataloging Module or a single module
- click on the red X in the upper right hand corner.
- Select ALEPH/Exit from ALEPH menu or use Alt+F4

EXIT all open Modules and close ALEPH

To Exit all open Modules and close ALEPH with one click.
- click the gold X in the lower right hand corner of the Operations Bar.