



Follett Software

User's Guide

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Notes

Contents

Welcome 27

- Getting started 28
 - Viewing the online User's Guide 28
 - Getting help 29
 - About our customized training 29
- Contacting Follett Software Company 29
 - Follett's toll-free number 29
 - Visit our Web site 30
 - Contacting Technical Support 30
 - What's follett-talk? 30
 - Enhancement requests 30

System Setup 31

Chapter 1 System Setup basics 31

- About the setup chapters 31
- What you'll need 32
- Getting around in System Setup 33

Chapter 2 Setting up your site 35

- Identifying your library 35
 - Obtaining a MARC Organization Code 36
- Identifying your country and first month of statistical year 36
- Setting up your barcode symbologies 37
 - Selecting a barcode symbology 38
 - Can symbologies be mixed? 38
 - How to select and define barcode symbologies 39
- Protecting your Follett applications with passwords 40
 - How to change an application password 41
 - Transferring the PHD application to a PHD 42

- How to change the PHD settings 43
- Maintaining events for Catalog Plus 43
- After setting up your site 44

Chapter 3 Preparing to catalog your collection 45

- Grouping your collection according to lending period 45
 - How to add or edit circulation types 47
- Identifying call number locations in your MARC records 47
- Setting up your call number prefixes 48
 - How to add or edit call number prefixes 50
 - Sorting your call numbers 51
- Increasing access to your collection with categories 52
 - How to add or edit categories 53
 - How to delete categories 54
- Defining the tag range for your brief MARC records 54
- Setting up miscellaneous Cataloging options 55
- After preparing for cataloging 59

Chapter 4 Setting up Acquisitions 61

- Adding vendors 61
 - Contact tab 63
 - Notes tab 63
 - Purchases tab 63
- Adding funding sources 64
 - Amount tab 65
 - Notes tab 66
- Setting the default information 66

Chapter 5 Preparing to circulate your collection 69

- Grouping your patrons by type 69
 - How to add or edit a patron type 71
- Making it easier to create new patrons 72
- Empowering your patrons 74
- Circulation policies: who can have what and for how long 76
 - How to set circulation limits for patron types 77
 - How to limit loan periods 78
- Setting time limits for items on hold 78
 - Expiring holds 79
 - Deleting holds 79

- Setting up reserves 79
- Entering the time limits 80
- Activating automatic fine calculation and refunds 81
- Customizing your overdue, bill, and ready hold notices 82
 - How to change the wording on a notice 83
- Setting your library's hours 85
- Setting up your library's current calendar 85
- Setting up alert sounds (and more) for your circulation desk 88
- After preparing for circulation 90

Chapter 6 Building your union 91

- Who should read this? 91
- Where do we begin? 91
- What is data exchange? 92
 - Participation levels 93
 - Filtering rules 94
 - How are the "best" records created? 95
- Setting up your union 95
 - Entering union catalog site information 96
 - Entering union cataloging information 98
- Setting up your members 101
 - Defining your non-DX members 102
 - Defining your DX members 106
 - Deleting a member 112
- What's next? 112
 - Considerations for non-DX members and unions 113

Circulation Desk 115

Chapter 7 Circulation Desk basics 115

- What is Circulation Desk? 115
- Starting Circulation Desk 115
- Circulation Desk security 118
 - Limiting and restoring access to Circulation Desk 118
- Receipt Printer (Transaction Tracker) setup and printing 120
- Showing and hiding patron pictures 122
- Transactions 101 122
 - Typing or scanning barcodes 123

| | |
|---|-----|
| Finding patrons or copies | 123 |
| Important messages for patrons | 126 |
| Sounds | 126 |
| Handling block conditions during a transaction | 127 |
| Adding or editing a patron record | 129 |
| Viewing and printing patron information | 130 |
| Viewing the current status of a copy | 134 |
| Sending items to the bindery or on inter-library loan | 135 |
| Troubleshooting | 136 |

Chapter 8 Checking out items 137

| | |
|--|-----|
| How to check out a copy | 138 |
| Adding or editing a patron | 139 |
| Adding a title during a checkout | 139 |
| Handling non-circulating copies | 141 |
| Showing due dates | 142 |
| Special due dates for checkouts and renewals | 143 |
| Troubleshooting | 144 |

Chapter 9 Renewing items 147

| | |
|--|-----|
| Renewing all (or some) of a patron's checkouts | 147 |
| How to renew a single copy or stack of copies | 149 |
| Troubleshooting | 150 |

Chapter 10 Checking in items 151

| | |
|-----------------------------------|-----|
| How to check in a copy | 151 |
| Handling items on hold or reserve | 152 |
| Reshelving items | 152 |
| Troubleshooting | 152 |

Chapter 11 Dealing with fines and lost copies 155

| | |
|--|-----|
| Crime and punishment: the types of fines | 155 |
| Tracking fine payments | 156 |
| Recording payment against the fine balance | 157 |
| Recording payment for a single fine | 158 |
| Creating fines | 158 |
| Editing fines | 160 |
| Giving refunds | 161 |

- Marking a patron's checkout lost 161
 - Charging a fine for the lost copy 163
- Troubleshooting 164

Chapter 12 Managing holds 165

- A brief introduction to holds 165
- A brief introduction to reserves 166
 - Readying reserves 166
 - Circulating reserves 166
- Getting around the Holds/Reserves window 167
- Placing a hold or reserve for a patron 168
- Managing holds 169
 - Extending the life of a hold 169
 - Changing the priority of a hold 170
- Interpreting the Daily Holds Processing exception report 171
- Troubleshooting 174

Chapter 13 Circulating items with a PHD 175

- Why use a PHD to circulate your collection 175
- Before recording transactions with a PHD 176
- Recording transactions with a PHD 176
- Processing remote circulation transactions 176
 - Interpreting the Remote Circulation Processing exception report 179
- Troubleshooting 182

Patrons 183

Chapter 14 Patron Maintenance basics 183

- About Patron Maintenance 183
- Using Patron Maintenance 183
- Searching for patron records 184
 - How to search for a patron record 185
 - What happens if the patron isn't found 186

Chapter 15 Maintaining individual patron records 187

- About maintaining individual patron records 187

- How to add or edit a patron record 187
 - How to add, edit, and delete addresses 188
 - How to add or edit an important message or a note 189
 - How to add, replace, or remove a patron picture 189
- How to delete individual patron records 190

Chapter 16 Maintaining patron records in batches 191

- About global maintenance 191
- Globally updating batches of patrons 191
- Updating information for a few individual patrons 192
- Updating patron records using a PHD 193
- Globally deleting patrons 195
- Deleting patrons with a PHD 196
- Interpreting the exception report 198

Chapter 17 Importing patron information 199

- About importing patron records 199
- Formatting information for the librarian's technical personnel 199
 - Follett's patron import data file formats 199
- Importing patron records 202
 - Interpreting the exception report 203
- Importing patron pictures 204
 - Interpreting the exception report 206

Chapter 18 Exporting patron records 207

- About exporting patron records 207
- How to export patron records 208

Inventory 209

Chapter 19 Inventory basics 209

- Overview of an inventory 209
 - Preparing for inventory 210
 - How will Inventory affect circulation? 210
 - After inventory 212
- Inventory Checklist 213

Starting and getting around in Inventory 215

Chapter 20 Taking inventory of your collection 217

Beginning an inventory 217
Entering copies into Inventory 218
 Entering copies directly into the Inventory main window 219
 Using a PHD to inventory your collection 221
 Using a portable computer to inventory your collection 223
 Interpreting the Remote Inventory exception report 228
Finalizing an inventory 230
 Printing reports of your Missing items 231
Resetting Missing copies 231
Marking items Missing outside an inventory 232
Deleting Missing items 232

Cataloging 233

Chapter 21 Cataloging basics 233

Cataloging 101 233
 Using MARC bibliographic and authority record formats 233
 Permanent or temporary? 234
Starting Cataloging 235
 Customizing the toolbar 236
 Cataloging Security 238
Finding MARC records in your collection 240
 Using Limiters on your local database 241
 Accelerated Reader search 242
 Lexile search 243
 Reading Counts search 244
 Find-It-All Collection 245
Searching Alliance Plus Online or Alliance Plus CDs 245
 Scanning an ISBN 247
Searching your DX union catalog 247
Using your search results 248
 TitlePeek 250
Adding, saving, copying, and editing MARC records 251
Deleting a MARC record 252
Printing MARC records 253

Chapter 22 Using the Easy Editor 255

- When to use the Easy Editor 255
- Working with bibliographic records 255
 - Brief MARC Record tab 256
 - Added Description tab 257
 - Providing access through subjects 259
 - Providing additional entries 260
 - Using the Find Headings feature 261
 - What's next? 262

Chapter 23 Using the MARC Editor 263

- Working with bibliographic records 263
 - Adding new bibliographic records 264
 - The MARC Editor: an overview 265
 - What is a "good" bibliographic record? 265
- Tags: the backbone of a MARC record 266
 - Bibliographic fixed-length tags 268
 - Variable-length tags 273
 - What's next? 277
- Working with authority records 278
 - Creating cross-references 278
 - Getting started 278
 - Adding new authority records 279
 - How are authority records different? 280
 - What's next? 284

Chapter 24 Working with copies 285

- Adding and editing copies 285
- Deleting a copy 288

Chapter 25 Importing MARC records 289

- Importing bibliographic records 289
 - Importing MARC 21/852 Holdings data 291
 - Importing MARC 21/852 Holdings Format Data by Barcode 295
 - Importing MARC 21/852 Holdings Format by Control Number 296
 - For Winnebago records: Reconstructing your barcodes and more 297
- Importing authority records 307
- Interpreting the exception report 308

Chapter 26 Exporting MARC records 311

- Getting ready to export 311
- Exporting bibliographic records 312
- Exporting authority records 318
- Splitting a collection 318
 - Using a PHD 318
 - Using categories 319
- Interpreting the exception report 321

Chapter 27 Maintaining your collection 323

- Using reports to analyze your collection 323
- Updating bibliographic headings globally 324
- Updating copy information globally 326
 - Adding funding sources or vendors to their tables 327
- Updating individual copies 330
- Deleting lost or missing copies globally 330
- Deleting subject headings by source globally 332
 - DX-enabled union catalogs and members 333
- Deleting tags globally 334
- Deleting titles without copies globally 335
- Using a scanner to delete copies 337
- Using your PHD for mass updates 338
 - Updating categories, circulation types, or copy status with a PHD 338
 - Removing categories from copies with a PHD 340
 - Deleting copies with a PHD 342
- Viewing the Weeding log 344
- Updating keywords 345
- Rebuilding cross-references 346
- Enhancing your records with the Book Cart 346
 - Adding titles to the Book Cart 346
 - Reconning titles in the Book Cart 347
 - Editing titles from the Book Cart 348
 - Transferring your records to and from MARC Magician 348
 - Printing the contents of the Book Cart 349
 - Merging copies onto one title record 351

Chapter 28 Cataloging tips 353

- Audiovisual equipment 353
- Vertical file material 353

- Videorecordings 354
- Electronic resources 355
 - Tag 856—Electronic Location and Access 355
 - System notes and considerations 357
 - Related materials 358
 - eBooks 360
 - Websites 366
 - Computer files 367
 - For further information 369

Chapter 29 Acquisitions 371

- The life-cycle of an order 371
- Adding or editing an order 372
 - Filling out an order 372
- Finding an order 375
- Editing vendor information 376
- Editing funding source information 377
- Updating address information 378
- Printing your order form 379

Alliance Plus 381

Chapter 30 Alliance Plus basics 381

- About Alliance Plus 381
- Starting Alliance Plus 381
- Choosing Alliance Plus Online or an Alliance Plus CD 382
- Using Alliance Plus 383

Chapter 31 Autorecon and Reading Program Recon 385

- About the Autorecon process 385
 - Bibliographic record modifications 386
- Preparing for an Autorecon 387
- Running an Autorecon 387
- About the Reading Program Recon process 390
- Preparing for a Reading Program Recon 391
- Running a Reading Program Recon 391

Chapter 32 Process Misses 395

- About Process Misses 395

Running Process Misses 396

Search Stations 403

Chapter 33 Setting up your search stations 403

- Accessing Setup 403
- General Setup tab 404
 - Choosing the OPAC interface 405
 - Controlling user access 406
 - Providing access to other applications 408
 - Setting up passwords 409
 - What's next? 409
- Text OPAC Setup tab 410
 - Choosing search options 410
 - Modifying the record display 412
 - Selecting limiter options 412
 - What's next? 414
- Visual OPAC Setup tab 415
 - Choosing display options 415
 - Selecting Bookbag options 416
 - Saving your settings 416
 - Importing the default buttons 416
 - Default button sets 416
 - What's next? 418
- Adding and editing action buttons 418
 - Identifying the button 420
 - Associating an image with the button 421
 - Choosing the Action of the button 422
 - Saving buttons 427
 - Deleting buttons 427
 - Putting it all together 428
- After saving your setup 429
 - Setting up multiple search stations 429

Chapter 34 Setting up WebCollection Plus 431

- Running WebCollection Plus 431
 - Shutting down a connection to the FairCom Server 431
- Accessing WebCollection Plus 432

| | |
|---|-----|
| Constructing the URL for the main page | 432 |
| Constructing the URL for the Setup Information page | 432 |
| Changing the setup password | 432 |
| A note about browser settings | 433 |
| The Setup Information page | 434 |
| Customizing the appearance of the pages | 436 |
| Changing the text on the main page | 436 |
| Changing the graphics | 437 |
| Providing tools and services for your patrons | 438 |
| Configuring the toolbar | 438 |
| Enabling the Bookbag | 439 |
| Setting up hold and interlibrary loan request options | 440 |
| Setting up WebCollection Plus for State Standards | 443 |
| Setting up WebCollection Plus for Keyword/Power and Browse searches | 444 |
| Checking a copy's status from WebCollection Plus for Union | 445 |
| Enabling Patron Empowerment | 445 |
| Setting up Visual WebCollection Plus | 447 |
| Providing more information access for your patrons | 448 |
| Accessing TitlePeek | 448 |
| Setting up QuickLinks | 448 |
| Modifying the record display | 449 |
| Viewing Follett eBooks | 449 |
| Enabling optional tabs | 450 |
| Customizing your pages | 450 |
| Information page | 450 |
| Web Links page | 451 |
| Testing your setup | 452 |
| WebCollection Plus for English/French or English/Spanish | 454 |
| Troubleshooting | 456 |

Chapter 35 Using your OPAC 457

| | |
|--|-----|
| Choosing the interface | 457 |
| Searching your library in the text interface | 458 |
| What is a Power search? | 459 |
| Accelerated Reader search | 461 |
| Lexile search | 461 |
| Reading Counts! search | 462 |
| Find-It-All Collection searches | 463 |
| Using the search results | 463 |
| Electronic Location and Access—the 856 tag in action | 466 |

- eBooks 467
- TitlePeek button 469
- Printing search results 470
- Searching tools 470
 - Customizing the limiters 470
 - Repeating a search 472
 - Patron Empowerment 472
 - Accessing other applications 474
 - Using the Bookbag 475
- Viewing events 476
- Resetting the search station 476
 - Clearing the current search 476
- Searching your library in the visual interface 477
 - Getting around in Visual OPAC 477
 - Tracing your steps 479
 - Using the Type In Search 480
 - Using the search results 481
 - Viewing the record 482
 - Using the Bookbag 484
- Clearing the search station 484

Reports 485

Chapter 36 Reports basics 485

- About Reports 485
 - Creating custom reports 486
- Starting Reports 487
- Generating a report 489
 - Selecting a report 489
 - Setting the report options 489
 - Changing the date used to run reports 494
- Printing the report 495

Chapter 37 Cataloging reports 499

- Cataloging reports overview 499
- Generating a Bibliography Report 502
- Generating a Brief Records Report 503
- Generating a Code Table List 504

| | |
|--|-----|
| Generating a Copies Added Report | 506 |
| Generating a Copies by Funding Source or Vendor Report | 507 |
| Generating a Copies With Different Call Numbers Report | 511 |
| Generating a Copies With Other Call Numbers Report | 512 |
| Generating a Copies Without Call Numbers Report | 513 |
| Printing Copy Barcode Labels | 514 |
| Generating a Copy List by Circulation Type | 516 |
| Generating a Headings Without Authorities Report | 517 |
| Generating a Lexile Report | 520 |
| Generating a Shelf List | 521 |
| Generating Spine/Pocket Labels | 522 |
| Generating a Title List | 525 |
| Generating a Titles Added/Updated Report | 529 |
| Generating a Titles by Category Report | 530 |
| Generating a Titles With Duplicate Standard Numbers Report | 531 |
| Generating a Titles Without Copies Report | 533 |
| Generating a Titles Without Standard Numbers Report | 534 |
| Generating a Used or Unused Copy Barcodes Report | 535 |

Chapter 38 Circulation reports 537

| | |
|---|-----|
| Circulation reports overview | 537 |
| Generating a Category Statistics Report | 539 |
| Generating a Checkouts/Fines Transactions Report | 540 |
| Generating a Circulation Statistics Report | 542 |
| Generating a Collection Age by Call Number Report | 545 |
| Generating a Collection Age by Subject Report | 547 |
| Generating a Collection Statistics Report | 548 |
| Generating a Collection Value Report | 550 |
| Generating a Copy List by Status | 551 |
| Generating Date Slips | 552 |
| Generating Hold Notices | 553 |
| Generating a Hold Statistics Report | 556 |
| Generating a Hold Transaction List | 557 |
| Generating an Inventory List by Call Number | 558 |
| Generating an Inventory List by Title | 559 |
| Generating Overdue/Bill Notices | 561 |
| Generating an Overdue List | 566 |
| Printing Patron Barcode Labels | 567 |
| Generating a Patron Barcode List | 570 |
| Generating Patron Cards | 572 |

- Generating a Patron Name List 575
- Generating a Patron Statistics Report 577
- Generating a Used or Unused Patron Barcodes Report 579

Chapter 39 System reports 581

- Generating your system circulation statistics 582
- Generating a System Information Report 582
 - More information for union catalogs and members 584

Chapter 40 Extracting data 585

- About extracting data 585
- How to extract data 585
- Using extracted data 586

Utilities 591

Chapter 41 Database maintenance utilities 591

- About Utilities 591
 - When should I run a utility? 591
 - What if a utility is interrupted? 592
 - Backing up your library database 592
- Starting Utilities 592
- About the Maintenance utilities 593
 - Check Database Integrity 594
 - Rebuild Keywords 595
 - Rebuild MARC Headings 596
 - Rebuild File Indexes 597
- About the Advanced utilities 598
 - Rebuild Database 599
 - Reload File 600
 - Remove Patron History 601
 - Empty Database 602
 - Enable/Disable Data Exchange 602
- Viewing your registered products 603
- Interpreting the Utilities exception report 603

Chapter 42 Backing up your database 605

- Develop a backup strategy 605

- How do I back up my database? 605
- Media rotation 606
- Backup tips 606
- Using Follett Software's Backup and Restore 607
 - Backing up your database 608
 - Restoring your database 609
- Using another vendor's backup software 610
 - Single-user sites 610
 - Multiuser sites 611
 - Restoring from backup 612

Appendices 613

Appendix A Glossary 613

Appendix B Bibliographic and authority tags 627

- Bibliographic tags 627
- Tags in the Easy Editor 632
- Reading and interest levels and the 521 tag 634
- Reading programs and the 526 tag 635
- Searchable tags 637
- Tags displayed in online public access catalogs 638
- Authority tags 639

Appendix C Bibliographic and authority templates 643

- Selecting a template 643
 - Editing the leader, 007, and 008 tags 645
 - Editing an existing tag in a template 645
 - Inserting a tag into a template 646

Appendix D Barcode symbologies 647

- What does a barcode contain? 647
- Barcode terminology 648
- What are your barcode options? 649
- Defining the barcode symbology 650
- Assigning barcodes 652

Appendix E Using a PHD+, PHD+ II, or PHD Laser+ 653

- PHD+, PHD+ II, and PHD Laser+: the Telxon models 653
 - Supported barcodes 654
- Connecting a PHD to your computer 655
- Downloading the application 655
- Using a Telxon PHD 656
 - The Telxon PHD main menu 657
 - Keys used most often 658
 - How to change key functions 658
 - PHD features 659
 - PHD task commands 659
 - Mastering barcode scanning 660
 - PHD scanning sounds 661
- Recording remote circulations 661
 - Starting circulation mode and setting the date 662
 - Checking out and renewing items 662
 - Checking in items 663
- Collecting inventory, copy, or patron data 663
- Erasing data from a PHD 664
- Troubleshooting 664
- Rebooting your Telxon PHD 667
- Maintenance information 668
 - Storing your PHD 668
 - Cleaning your PHD 668
 - Charging and recharging batteries 668
 - Backup power 669
 - Disposing of old batteries 670

Appendix F Using a PHD Dolphin+ 671

- Getting started 671
 - Loading the PHD application for the first time 671
- PHD Dolphin+ basics 672
 - Navigating the PHD Dolphin+ 672
 - Entering alpha and special characters 672
 - Supported barcodes 673
 - Scan and battery capacity 673
- Collecting circulation information 674
 - Checking in items 674
 - Checking out and renewing items 675
- Collecting inventory scans 676

| | |
|--|-----|
| Collecting patron barcodes | 676 |
| Collecting copy barcodes | 677 |
| Examining barcode scans | 678 |
| Reviewing or deleting individual scans | 678 |
| Viewing scan counts | 678 |
| Erasing scans | 679 |
| Troubleshooting | 679 |
| PHD Dolphin+ Quick Reference Guide | 682 |
| Important Keys | 682 |
| PHD Dolphin+ Main Menu | 683 |
| Procedures | 683 |

Appendix G The Bar Tender 693

| | |
|------------------------------------|-----|
| Setting up The Bar Tender | 693 |
| Specifying the label stock layout | 693 |
| Editing the barcode label contents | 693 |
| Printing sequential barcode labels | 695 |
| Saving sequential barcode setup | 695 |
| Printing patron barcode labels | 695 |
| Barcodes in The Bar Tender | 696 |

Appendix H Configuring scanners 699

| | |
|---|-----|
| Uses | 699 |
| Selecting a scanner | 699 |
| ScanTeam 3400 CCD | 700 |
| Getting ready | 700 |
| Programming codes for ScanTeam 3400 CCD scanner | 701 |
| ScanTeam 5400 Laser | 701 |
| Getting ready | 701 |
| Programming codes for ScanTeam 5400 Laser scanner | 702 |

Welcome

Welcome to Follett Software Company's suite of library automation solutions. This guide includes information about many of our integrated products, even though you may not have purchased all of them.

Circulation Plus is a complete library collection and patron management system. It circulates your collection and tracks circulation and patron statistics, fines, holds, reserves, and your library schedule. Once you set up your policies, you can use Circulation Plus to add patron, MARC, and copy records to your database; circulate materials; print reports; and take an inventory. Circulation Plus includes the basic shared modules (System Setup, Reports, Cataloging, Utilities, and Backup and Restore) and the circulation modules (Circulation Desk, Inventory, and Patron Maintenance).

Catalog Plus offers flexible searching capabilities to help you and your patrons easily locate the materials you want. Once you've set up your site and built your database, you can search your entire collection. Catalog Plus includes the basic shared modules (System Setup, Reports, Cataloging, Utilities, and Backup and Restore) plus an OPAC (On-line Public Access Catalog) for your patrons. An OPAC for your cross-platform search stations is also available.

Union Catalog Plus allows you to create a district-wide database from all the MARC records of the member sites. Follett Data Exchange Server instantly updates the union and the member databases with cataloging changes made at any of the sites. These changes are shared, or not, according to the participation preferences of each member. The search results in the OPAC show all copies of a title and their locations.

Alliance Plus lets you add or enhance library bibliographic records with information from an online database with over 5 million titles and a suite of CD-ROMs. This *User's Guide* includes information for integrating Alliance Plus into your collection maintenance tasks. Alliance Plus is also available for unions.

WebCollection Plus and the Z39.50 Server expand access to your collection. WebCollection Plus gives your patrons access to your collection over the Internet. Z39.50 Server makes your library database accessible to Z39.50 clients worldwide. Follett Software Company also offers BookWhere? 2000, a Z39.50 client that lets users search multiple Z39.50 databases at the same time. WebCollection Plus and Z39.50 Server are also available for unions.

Find-It-All Collection provides one-stop searching of multiple online resources with Find-It-All One Search, and access to over 160,000 safe, high-quality K-12 Web sites aligned to state and national standards with Find-It-All Knowledge Links. Students can access Find-It-All Collection from Follett's OPAC, WebCollection Plus, or their Internet browser. Find-It-All Collection gives your students access to the best information in the least amount of time.

A PHD (Portable Handheld Device) is a portable scanner that collects, stores, and transmits data. A PHD lets you expedite your circulation, cataloging, inventory, and reporting activities. Circulation Plus and Catalog Plus currently support four PHD models: PHD+, PHD+ II, PHD Laser+, and the PHD Dolphin+.

If you are interested in learning more about any of the Follett Software products and services mentioned here or elsewhere in this guide, please refer to “Contacting Follett Software Company” on page 29.

Getting started

We know you’re eager to get started. This *User’s Guide* is designed to help you get the information you need when you need it. The first section covers the setup tasks you need to complete. The remainder of the guide provides information on a module-by-module basis. Be sure to take a look at the end of the guide for the Glossary and information on MARC tags, the PHDs, and The Bar Tender.

Many of Follett Software Company’s applications have been developed for both the Windows and Macintosh operating systems. This guide provides instructions for using the applications on either platform. All differences between platforms are noted in the text.

This guide assumes you have a basic understanding of your operating system. If you need help with OS-specific tasks, such as changing your screen resolution, associating a program with a particular file type, assigning sounds to events, or creating shortcuts/aliases, please see your operating system’s help.

Throughout this guide, when instructing you to select several menu commands in sequence, this guide uses a vertical line to indicate a division between menus and submenus (for example: Edit | Global Update | Headings).

You’ll notice blocks of information in this guide that are preceded by a boldface word. The bold-faced word indicates the information’s importance:

- Note:** Provides additional information
- Important:** Indicates information crucial for optimal performance
- See also:** Directs you to another source of information for a given topic
- Warning:** Warns that a particular function may change or delete data

Viewing the online User’s Guide

By default, this guide is installed in an electronic format wherever you installed Circulation Plus, Catalog Plus, or Union Catalog Plus. This lets you access the guide wherever and whenever you need it. With the online guide, you can quickly search for a specific word or phrase and print pages of the guide.

Note: To use the online *User’s Guide*, you’ll need Adobe® Acrobat® Reader v5.x or higher. The current version of Adobe Acrobat Reader can be installed from the Adobe Acrobat Web site.

To open the online guide, from the computer desktop, open the Follett Applications folder and double-click the *User's Guide* icon. You can also access the Follett Applications menu from the Windows Start | Programs menu or from the Mac OS Apple menu.

Getting help

In addition to the information contained in this guide, all the Follett applications come with extensive help topics. These help topics are designed to provide you with quick access to important information about the module you're using.

To get help with a specific window or dialog, simply click the Help button. You can also select Help from the menu bar at the top of the module's window. From the Help menu, you can access the help topic for the current window, a description of the menus displayed in the current module, product information, and counts for the current number of patrons, titles, and copies in the system.

About our customized training

Follett Software Company offers several options for interactive training with a Follett representative. Visit our Web site at www.fsc.follett.com or call 1-800-323-3397 for details.

Contacting Follett Software Company

For information about our products, or if you need assistance, please contact us using any of the following methods:

Follett's toll-free number

Use the following number and enter the extension or number key to contact the departments listed below:

(800) 323-3397

7:00 A.M. to 7:00 P.M. central time

| | |
|--|-------------------|
| Customer Service (order placement and status, returns, training and workshop information) | Press 1 |
| To order product literature | Press 2 |
| Upcoming events | Press 3 |
| FSC's mailing address, additional numbers | Press * |
| Accounts Receivable | Ext. 7201 or 7415 |
| Customer Service Fax | 1-800-807-3623 |

Visit our Web site

Follett Software Company's home page is located at <http://www.fsc.follett.com>. From our home page, you'll discover:

- What's new at Follett Software Company
- How to integrate information literacy solutions with technology
- How to solve some of the technology challenges your district is facing
- Information on automating English-speaking libraries world-wide
- How to make your library more efficient and your resources more accessible

Contacting Technical Support

If you need technical support for one of our products and have a support agreement for that product, you may call, fax, or email your questions to us free of charge. Be sure to include your customer number and as much detail as possible (e.g., the contents of critical error messages, what you were doing when an error occurred, etc.).

Phone: (800) 722-7424 7:00 A.M. to 6:00 P.M. central time

Fax: (815) 578-5196

Email: techsupport@fsc.follett.com

Support Web page <http://www.fsc.follett.com/support/>

Important: If your support agreement has expired and you need service, call Customer Service at (800) 323-3397.

What's follett-talk?

As a Follett Software customer, you are entitled to subscribe to follett-talk, an Internet mailing list. This electronic discussion group lets you share your experiences with our software products and services, ask questions, and receive responses from other Follett Software customers. Anything related to Follett Software is welcome on this mailing list.

To join follett-talk, fill out the subscription form on our Web site or send an email message to: mailsrv@fsc.follett.com. In the body (not the subject line) of your message, include: **subscribe follett-talk firstname lastname** (e.g. subscribe follett-talk John Smith).

Enhancement requests

We welcome your ideas and comments. If you have ideas for enhancing our products, guides, or services, *please* copy the form at the back of this guide, fill it out, and mail it to us; or you can submit your suggestion online at http://www.fsc.follett.com/contact/suggest_feature.cfm.

Chapter 1 System Setup basics

Once you've completed installation, you're ready to set up the Circulation Plus/Catalog Plus applications. Check the details in the following sections before you start.

Note: If you're setting up Union Catalog Plus, please see Chapter 6, "Building your union."

About the setup chapters

The tasks in the setup chapters are presented in sequential order. You should complete all of the setup tasks in a chapter before proceeding to the next chapter.

If you did not purchase both Circulation Plus and Catalog Plus, the following table explains which setup chapters you are required to complete before using the software:

| If you purchased only Circulation Plus, complete the tasks in these chapters: | If you purchased only Catalog Plus, complete the tasks in these chapters: |
|--|--|
| Chapter 2, "Setting up your site" | Chapter 2, "Setting up your site" |
| Chapter 3, "Preparing to catalog your collection" | Chapter 3, "Preparing to catalog your collection" |
| Chapter 4, "Setting up Acquisitions" | Chapter 4, "Setting up Acquisitions" |
| Chapter 5, "Preparing to circulate your collection" | Chapter 33, "Setting up your search stations" |

In addition to the setup tasks described in the chapters above, you might also want to customize your MARC bibliographic and authority templates. This procedure is described in Appendix C, "Bibliographic and authority templates." This function is not available on Mac OS.

Note: The instructions in the setup chapters assume that you've already barcoded your collection and your patron library cards. If you haven't done this, you'll need to do so before you can circulate your collection using Circulation Desk or before using OPAC. If Follett Software has converted your patron and library material data for you, complete the setup chapters first, and then import your data.

What you'll need

To aid you in setting up Circulation Plus/Catalog Plus quickly and accurately, we recommend that you gather the following information before you start:

- The official name of your site as you would like it to appear on reports, and your MARC Organization Code (formerly known as holdings code), if applicable.
- Information about your barcode symbologies. If you purchased your barcodes from Follett, this information appears on the packing slip that arrived with your barcodes. If you're using another vendor, or aren't sure what kind of barcodes you're using, please read Appendix D, "Barcode symbologies," before beginning to set up your software.
- A list of the call number prefixes you use in your library, if any.
- A list of circulation descriptions based on the types of books you have in your collection. For example: "2-week checkout" (fiction, biographies, etc.), "1-hour checkout" (encyclopedias, dictionaries, maps), and "Overnight checkout" (general reference books).
- If you want to use the Acquisitions feature, pertinent vendor and funding source information.

In addition, if you purchased Circulation Plus, you'll want to gather together the following:

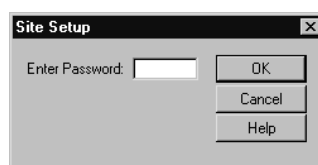
- A list of your patron groupings. For example: elementary school, middle school, high school, parents or volunteers, staff, etc.
- A copy of your library policy handbook, or a list of your circulation policies.
- A copy of your school's or site's calendar that lists all of the closed days and holidays for the current and upcoming year.

Getting around in System Setup

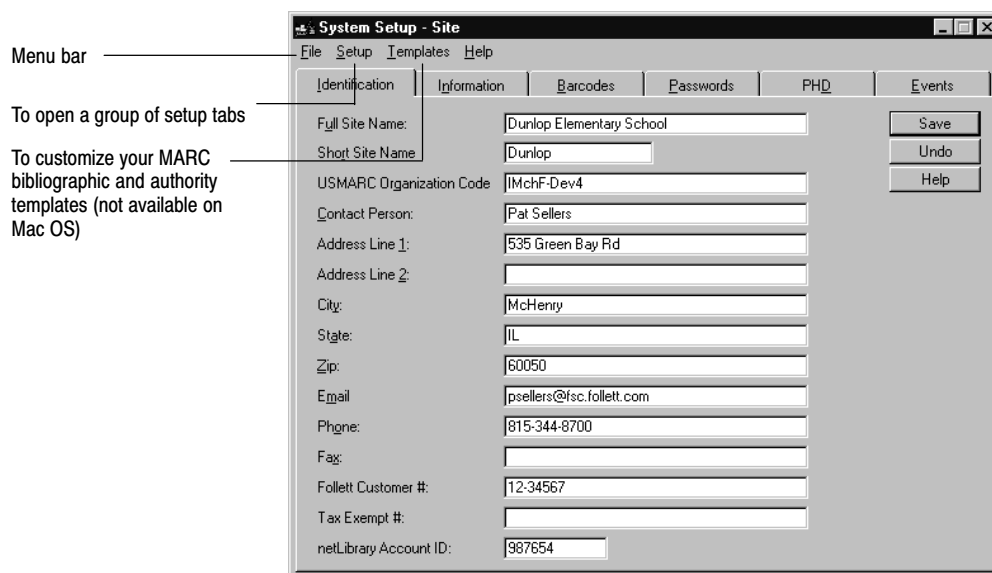
To begin setting up your software, from the computer desktop, open the Follett Applications folder and double-click the System Setup icon. You can also access the Follett Applications menu from the Windows Start | Programs menu or from the Mac OS Apple menu.

Important: When you launch System Setup for the first time, it creates files that are used by all the other Follett applications. This process may take several minutes.

The Site Setup password dialog appears:



Enter the default password, **MAKEITSO**, or your own previously defined one, and click OK. The Site tabs appear with the Identification tab open:



The menu bar in the System Setup module contains the following menus:

- File menu—Contains the Exit/Quit command used to close System Setup.
- Setup menu—Contains the options for accessing the various setup tabs. For example, to access the Site tabs, choose Site from the Setup menu. The setup tasks associated with the items on this menu are described in Chapters 2 through 5.
- Templates menu—(Not available on Mac OS) Contains options for modifying the MARC bibliographic or authority templates. The tasks associated with

these options are described in Appendix C, “Bibliographic and authority templates.”

- Help menu—Contains options for finding help pertaining to System Setup. From the About dialog you can see product information for the application, the current number of patrons, titles, and copies in the system, and run the System Circulation Statistics and System Information Reports (see Chapter 39, “System reports”).

You should begin setting up Circulation Plus/Catalog Plus by entering your site information in the System Setup - Site tabs. Proceed to Chapter 2, “Setting up your site,” for the instructions.

Chapter 2 Setting up your site

In this chapter, you'll do the following setup tasks: identify your library; identify your country and the first month in your statistical year; set up your barcode symbologies; protect your Follett applications with passwords; transfer the PHD application to your PHD, if you have one; and maintain events for OPAC.

Identifying your library

System Setup allows you to store the most relevant information about your site, such as your site's name and MARC Organization Code, in a place that's accessible to all Follett applications.

Note: For non-US sites, complete the tasks in the next section, "Identifying your country and first month of statistical year," before identifying your library.

1. After launching System Setup, a password dialog for Site Setup appears. The default password for Site Setup is MAKEITSO. Type the password and choose OK. The Site tabs appear with the Identification tab open:



To obtain a MARC Organization Code, see page 36.

The person to whom library mailings are directed

Voice phone number for the library's contact person (e.g., the head librarian)

This number—assigned to you when you purchased this software—is required by Follett's online services (e.g., Alliance Plus Online, WebPath Express, and Find-It-All Collection).

Your site's federal or state tax exemption number

A screenshot of the 'System Setup - Site' dialog box. The 'Identification' tab is selected. The form contains the following fields and values:

| Field | Value |
|---------------------------|--------------------------|
| Full Site Name: | Dunlop Elementary School |
| Short Site Name: | Dunlop |
| USMARC Organization Code: | IMchF-Dev4 |
| Contact Person: | Pat Sellers |
| Address Line 1: | 535 Green Bay Rd |
| Address Line 2: | |
| City: | McHenry |
| State: | IL |
| Zip: | 60050 |
| Email: | psellers@fsc.follett.com |
| Phone: | 815-344-8700 |
| Fax: | |
| Follett Customer #: | 12-34567 |
| Tax Exempt #: | |
| netLibrary Account ID: | 987654 |

Buttons: Save, Undo, Help

Your site's name (appears on reports and notices)

To cancel changes before saving

Your site's mailing address appears as the return address on Hold, Overdue, and Bill Notices.

Note: Field names vary based on your address format (e.g., State vs. Province).

If you purchased netLibrary eBooks, this number is required to allow checkouts.

2. In the text boxes, enter your official site information. When you're finished, choose Save. The only information that is required here is your site's name and your Follett customer number, unless you are a member of a union.

For Union Catalog Plus members: If you are a member of a union catalog, you must also enter a short site name and a MARC Organization Code. The short site name is limited to 10 characters and should be a meaningful abbreviation of the full site name. In Union Catalog Plus, the short site name appears with the copy information in Cataloging, OPAC, and WebCollection Plus for Union. If you do not have a MARC Organization Code, see the instructions below.

Obtaining a MARC Organization Code

To obtain a MARC Organization Code, fill out the online request form at <http://lcweb.loc.gov/marc/organizations/> or contact the Library of Congress directly (fax or email requests are preferred and can speed up processing):

Library of Congress
Network Development and MARC Standards Office
101 Independence Ave, SE
Washington, DC 20540-4402 Fax: (202) 707-0115

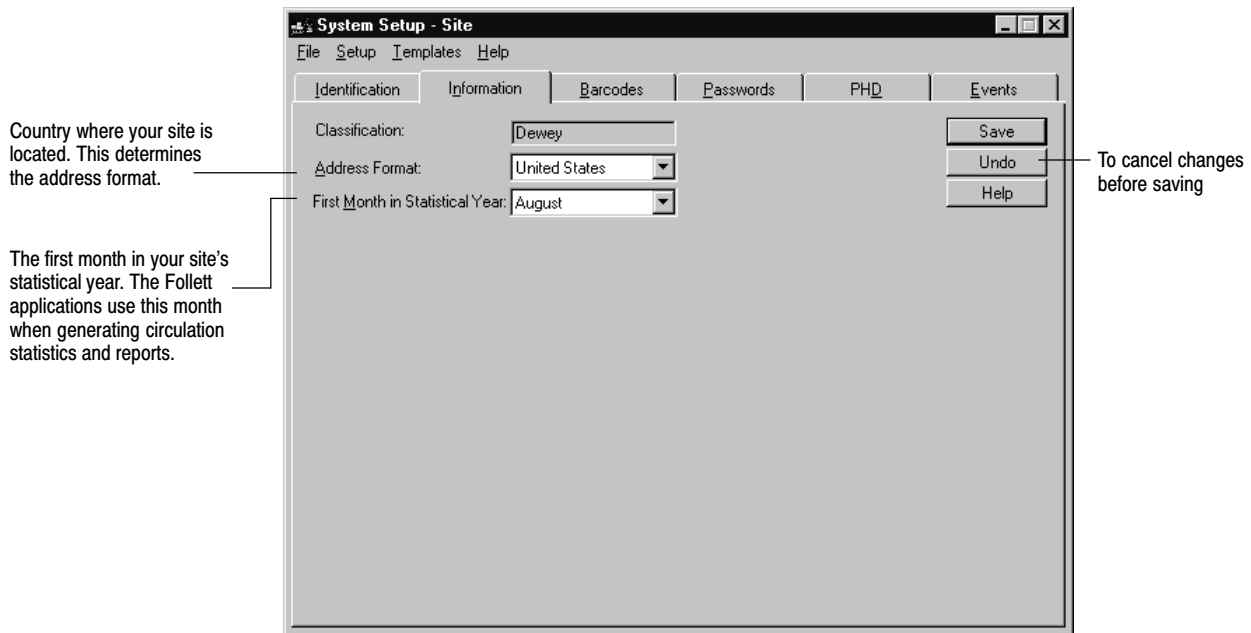
Canadian organizations should contact the National Library of Canada at illser@knoll-bnc.ca to obtain a library symbol.

Your MARC Organization Code must be unique among the sites with whom you may share records.

Identifying your country and first month of statistical year

System Setup allows you to choose from three address formats: US, Canadian, and Other Countries. Changing your address format changes the address format of the Identification tab and modifies the template you use to add patrons. To ensure accurate statistical reports, System Setup requires that you define the first month in your statistical year.

1. From the Site tabs, select the Information tab:



Note: The Follett applications track circulation statistics automatically. If you are familiar with our earlier products, this means that you no longer need to reset counters.

2. Select your address format and the first month in your statistical year from the list. When you're finished, click Save.

See also: For information about running statistical reports on your collection's circulations, see the Collection Statistics (page 548), Patron Statistics (page 577), and System Circulation Statistics (page 582) reports.

Setting up your barcode symbologies

Before you can start scanning barcodes for library items or patrons or before you start importing copies, you must inform Circulation Plus/Catalog Plus which symbology you are using, or plan to use. There are three preparative steps:

- Select the barcode symbology you are using for patrons and library items.
- Define the barcode symbologies if other than Follett Classic.
- Test the barcode symbologies.

You don't need to define Follett Classic as your symbology. Follett Classic is always recognized, and any barcode with seven digits or fewer is recognized as Follett Classic. A barcode symbology with eight or more digits must be defined.

Note: Circulation Plus/Catalog Plus let you automatically assign the next highest available barcode number to an item or a patron. For more information, see "Assigning barcodes" on page 652.

Selecting a barcode symbology

Circulation Plus and Catalog Plus can recognize the following barcode symbologies:

- Follett Classic symbologies
- Generic Codabar
- Codabar Mod 10
- Generic Code 39
- Code 39 Mod 10
- Code 39 Mod 11
- Code 39 Mod 43
- Generic Interleaved 2 of 5
- Interleaved 2 of 5 A
- Generic LabelCode 5

Follett Software applications recognize the industry-standard 14-character barcode symbologies and the Follett Classic barcode symbologies.

See also: For more information about using the above barcode symbologies, refer to Appendix D, “Barcode symbologies.”

PHD supported barcodes

You can use a PHD to simplify certain circulation, cataloging, inventory, patron maintenance, and reporting activities. Currently Follett Software supports four PHD models. For information about the barcodes supported by the PHD+, PHD+ II, or PHD Laser+, see page 654. If you’re using a PHD Dolphin+, see page 673.

Important: To use a PHD, your barcodes must include a Type Identifier regardless of the symbology you choose. Follett Classic symbologies assume a “P” for patron barcodes and a “T” for library materials.

Can symbologies be mixed?

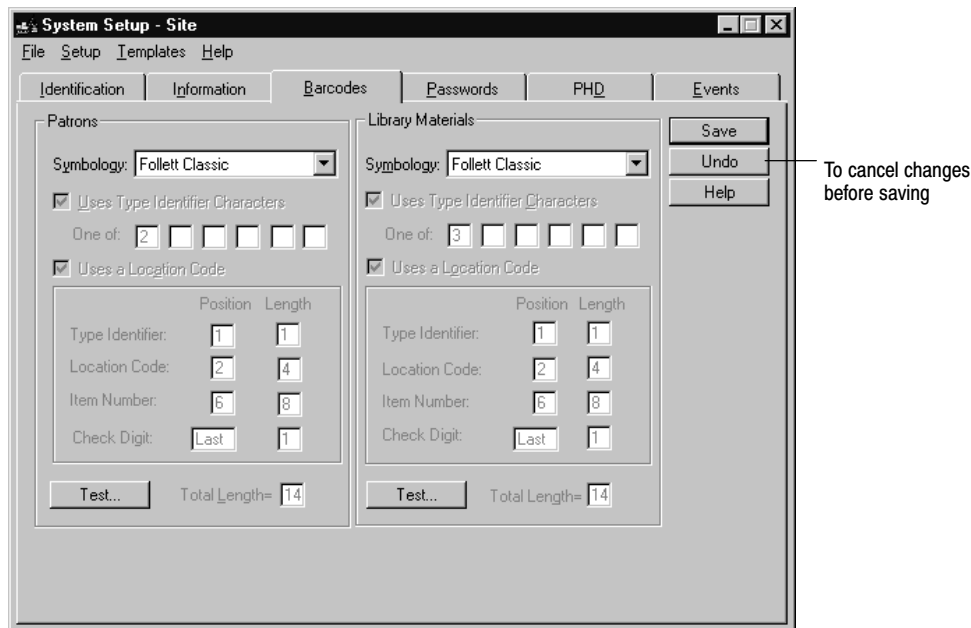
Circulation Plus/Catalog Plus allow you to use the same symbology for both your patron and your library item barcodes, or you can use different symbologies. For each type of barcode (patron and library item), you can use a Follett Classic symbology and an additional 8-to-14 digit symbology.

If you are already using a Follett Classic barcode symbology for your patrons or library items, you can still continue to use these barcodes. Even if you choose another symbology, say, Code 39 Mod 10 for your new patron barcodes, Circulation Plus will always recognize and accept those barcodes that are of a Follett Classic symbology.

If you choose to use a symbology other than Follett Classic, you can only use one additional 8- to 14-digit symbology for each type of barcode (patron or library item). For example, you could use Code 39 Mod 10 for patron barcodes and Code 39 Mod 43 for library items. However, you cannot use both Code 39 Mod 10 and Code 39 Mod 43 symbologies for patron barcodes because these symbologies use a different check digit algorithm.

How to select and define barcode symbologies

1. From the Site tabs in System Setup, select the Barcodes tab:



Note: If your site only uses Follett Classic symbologies for patrons and library materials, you're finished. Go on to the next section, "How to test a barcode."

2. From the Symbology drop-down lists, select the name of the symbology you are using for your patron and library item barcodes. If you are changing from one symbology to another, a message appears, warning you that some of your barcodes may become invalid, which might require you to re-barcode part of your collection. Choose Yes. Another message appears, explaining in detail the consequences of changing your symbology. Choose Yes.

If you use Follett Classic and a non-Follett Classic symbology, you only need to specify the non-Follett Classic symbology. Circulation Plus/ Catalog Plus always recognize and accept the Follett Classic symbologies.

If you ordered your barcodes from Follett Software, all of the information required to fill in the Barcodes tab is listed on the packing slip you received with your barcodes. If you didn't purchase your barcodes from Follett Software, and you're not sure how your barcode symbology is configured, contact your vendor.

If either of the following conditions apply to you, you may also want to refer to Appendix D, "Barcode symbologies," for more detailed information about filling out the Barcodes tab:

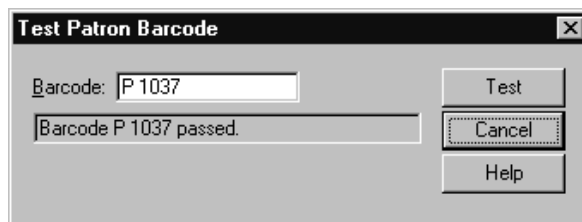
- You are converting from another software package that uses its own barcode symbology.
- You have printed, or are thinking about printing, your own barcodes. For more information, see Appendix G, "The Bar Tender."

3. Fill in the text boxes as appropriate for your symbology, and then test your barcodes using the instructions in the next section. When you're finished, click Save.

Important: You must fill in all fields that are enabled. If you don't know the information, contact your barcode vendor.

How to test a barcode

1. In the Barcodes tab, choose Test. The Test Barcode dialog appears:



2. In the Barcode text box, scan the barcode or type it, and then choose Test. When the validation process is finished, a message appears notifying you if the barcode passed or failed. If the test failed, contact your barcode vendor or Follett Software's Technical Support to ensure your symbology is set up properly in the Barcodes tab.

Protecting your Follett applications with passwords

For security purposes, Circulation Plus/Catalog Plus allow you to change the passwords you use to access the Circulation Plus/Catalog Plus applications such as Cataloging and Circulation Desk. This ensures that only those users who know the passwords can access the applications.

The Cataloging and Patron Maintenance tabs in System Setup are protected using the password for the corresponding application. For example, to access the Cataloging tabs in System Setup, you must enter the password for the Cataloging application. The Circulation tabs and the Site tabs have their own passwords, called the Circulation Setup and Site Setup passwords.

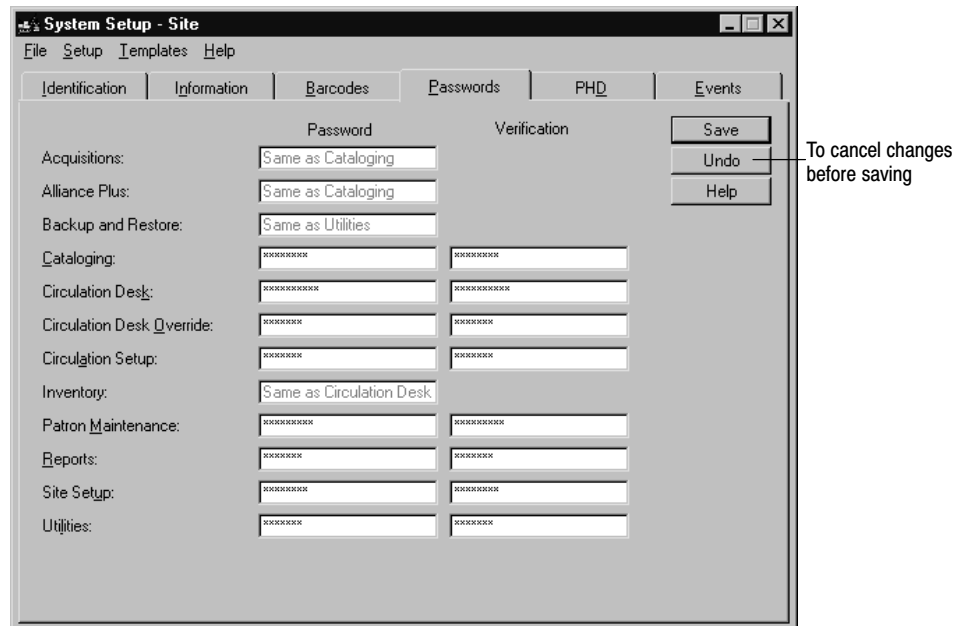
In addition to these passwords, you can also specify a password for overriding block conditions that occur during transactions in Circulation Desk. A block condition occurs when a patron violates a circulation policy, such as exceeding the maximum number of checkouts. In order to proceed with the transaction, you must enter the Circulation Desk Override password.

To use the security options in Circulation Desk, you must define a password for Circulation Desk. To use the security options in Cataloging, you need only define one on the Limit Cataloging Access dialog; you do not need to define a Cataloging password.

Note: If you don't want to use passwords, you may delete any or all of them.

How to change an application password

1. From the Site tabs, select the Passwords tab:



Tip: To remove password protection from your Follett applications, select the hidden text (*s), and then press **DELETE**.

2. In the Password column text boxes, type a password composed of up to ten alphanumeric characters. (See the following table for a list of the default passwords.) In the Verification column text boxes, type the same password again, and then choose Save.

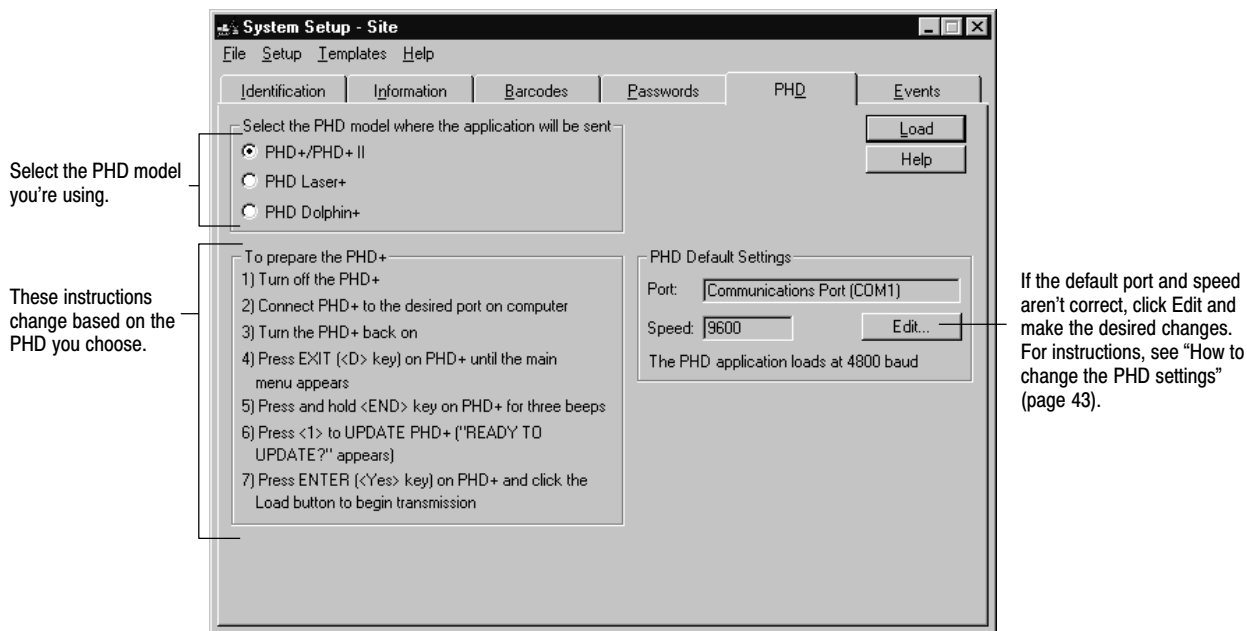
| Module | Password |
|---------------------------|---|
| Alliance Plus | Same as the password for Cataloging |
| Backup and Restore | Same as the password for Utilities |
| Cataloging | MODTITLE |
| Circulation Desk | CHECKITOUT |
| Circulation Desk Override | LETITGO |
| Circulation Setup | SOBEIT |
| Inventory | Same as the password for Circulation Desk |
| Patron Maintenance | MODPATRON |
| Reports | PRINTIT |
| Site Setup | MAKEITSO |
| Utilities | FIXDATA |

Transferring the PHD application to a PHD

Follett Software's PHD application allows your PHD to recognize your library's barcode symbologies and to work with Circulation Plus/Catalog Plus. Use the following steps to load the current version of the PHD application onto each PHD your library uses before you use it.

Once the application is loaded, you'll only need to repeat the process if:

- The PHD screen displays the message, "Ready to Update?"
 - You upgrade to a new version of Circulation Plus/Catalog Plus.
 - Your barcode symbologies change.
 - You share your PHD with other libraries that use different symbologies.
 - You're using a PHD+, PHD+ II, or PHD Laser+, and you've replaced the PHD's memory or batteries.
1. Make certain your PHD is connected to your computer. To protect your equipment, turn off the PHD and computer before connecting or disconnecting your PHD.
 2. From the Site tabs in System Setup, select the PHD tab:



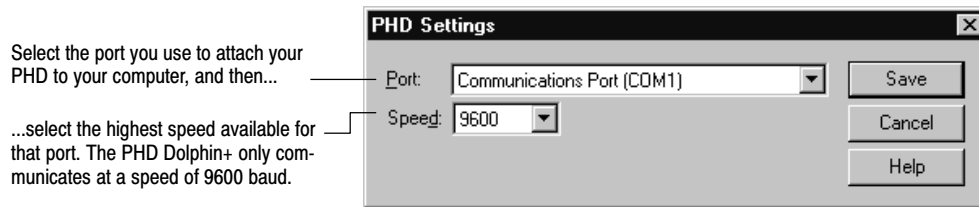
3. Once you've selected the correct PHD model and adjusted the PHD settings as desired, simply follow the instructions displayed on the screen.

Note: If you're loading the PHD application to a PHD Dolphin+ for the first time, see the instructions on page 671.

A progress dialog appears while the application is transferred to your PHD. When the process is complete, click Close to return to Site Setup.

How to change the PHD settings

If the default port and speed aren't correct for your PHD, from the PHD tab, choose Edit under PHD Settings. The PHD Settings dialog appears:



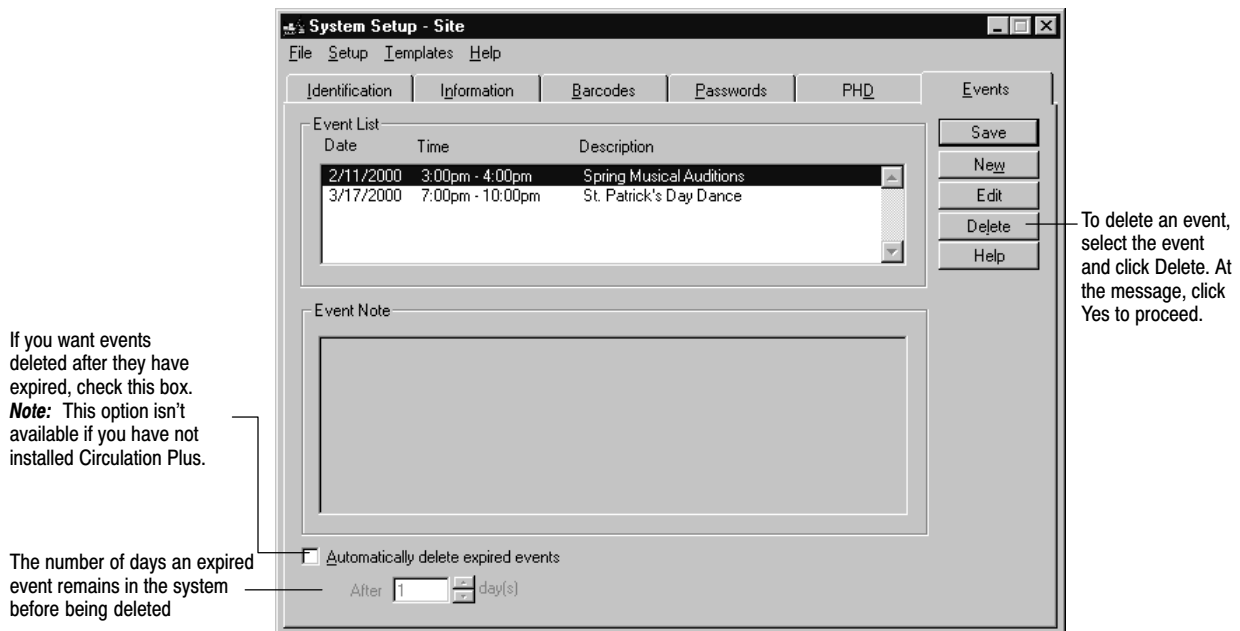
After selecting the port and speed for your PHD, click Save.

Note: The port and speed settings are saved as the defaults for this workstation only. You can change a workstation's default settings through any of the PHD features in the Circulation Plus/Circulation Plus applications.

Maintaining events for Catalog Plus

Entering event notes for specific days throughout the year is like keeping an event log or notebook of upcoming activities for the library, school, or community. If you have Catalog Plus, your library patrons can view the events you maintain in OPAC (see page 410) and with WebCollection Plus (see page 450). However, even if Catalog Plus is not installed, you can still maintain a list of events for yourself in System Setup.

1. From the Site tabs in System Setup, select Events.



- To add an event, click New. To edit an event, select the event under Event List, and click Edit. The dialog appears:

- Add or make changes under Event Information. Type the time and date that the event you are scheduling begins and ends.

Example: If the event is scheduled to begin at noon, type **12 p.** If the event starts at 9:30 in the morning, type **09:30 a.**

Type a brief description of the event. Adding a note for each event is optional. If you want to add or edit a note for a scheduled activity, put the cursor in the Event Note text box and type the note. When finished making changes under Event Information and Event Note, click Save. The Events List window reappears, displaying all events in chronological order.

After setting up your site

Whether you purchased Circulation Plus, Catalog Plus, or both, you're now ready to prepare to catalog your collection. Proceed to Chapter 3, "Preparing to catalog your collection."

Chapter 3 Preparing to catalog your collection

The Cataloging setup tasks you'll need to perform include the following: grouping your collection according to lending period; identifying probable call number locations in your MARC records; setting up your call number prefixes; increasing access to your collection with categories you define; defining the tag range for your brief MARC records; and making it easier to add copies to your collection.

Throughout this chapter there are references to MARC 21 (formerly known as USMARC), MARC records, and the MARC 21 standard. If you are not familiar with MARC, please find an appropriate reference guide before beginning, such as the *MARC Bibliographic Format Guide*, published by the Follett Software Company, or *MARC 21 Format for Bibliographic Data*, published by the Library of Congress.

See also: For more information about MARC, visit the Library of Congress Web site at <http://lcweb.loc.gov/marc>.

Grouping your collection according to lending period

As you already know, when a patron checks out a book, the circulation period (length of time he/she is allowed to keep the book) is based on the patron type (age or classification of the patron) and the circulation type (type of book). For example, libraries may only allow students to check out new books for half of the normal checkout period. To help you maintain the various lending periods based on the type of book, Circulation Plus/Catalog Plus allow you to create and assign circulation types to the copies in your collection.

Example: Let's suppose you want to limit the loan period of a new book to one week. You would create a circulation type such as "1-week checkout," or "New books," depending on how you want to group your collection, and then establish a corresponding loan period for this circulation type for each of your patron types in your circulation policies.

You assign a circulation type to a copy when you add a new copy to a title in Cataloging. You can change the circulation type of a copy by editing the copy.

Circulation types are, however, only descriptions of the loan periods for items in your collection. You establish the actual loan periods when you create your circulation policies for your patrons.

See also: For more information about how circulation types relate to loan periods, see "Circulation policies: who can have what and for how long" on page 76.

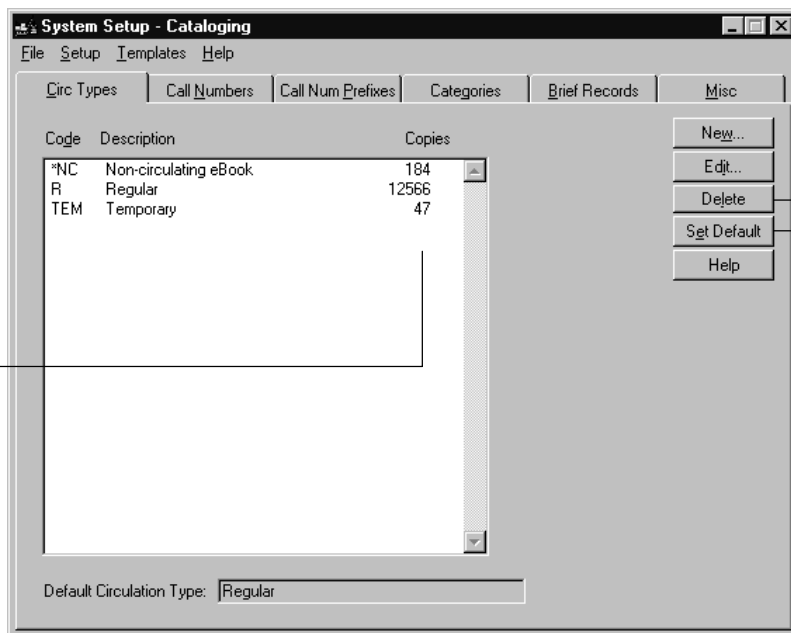
Circulation Plus/Catalog Plus have three default circulation types:

Suggested use for default circulation types

| Circulation type | Suggested use |
|-------------------------------------|---|
| Regular R | Use the Regular circulation type for library materials that can be checked out for the standard loan period set by your library. |
| Non-circulating eBook *NC | Use the *NC circulation type for electronic library materials, such as eBooks, that are not checked out through Circulation Desk. Copies with this circulation type cannot be circulated or have a hold or fine placed on them. Any block condition generated when trying to do so cannot be overridden. The inventory status is always Marked. NetLibrary eBook "copies" have this circulation type. |
| Temporary TEM | Use the Temporary circulation type for library materials that are not a part of your permanent collection and that can be checked out only on a temporary basis. This is typically used for magazines and newspapers. You can only assign the Temporary circulation type when you add a title during a checkout. Temporary titles are automatically deleted when the item is checked in. See also: For more information about temporary items, see "Adding a title during a checkout" on page 139. |

You can also use circulation types as a limiter when you generate the following reports: Overdue/Bill Notices and Checkouts/Fines Transaction Reports.

To access your circulation types, select Cataloging from the Setup menu in System Setup. If you have defined a password for Cataloging, a password dialog appears. The default password for Cataloging is **MODTITLE**. Type the password and choose OK. The Cataloging tabs appear with the Circ Types tab open:



The number of copies attributed to each circulation type increments as copies are added in Cataloging and Circulation Desk.

To delete the highlighted circulation type

To define the highlighted circulation type as the default for all new copies

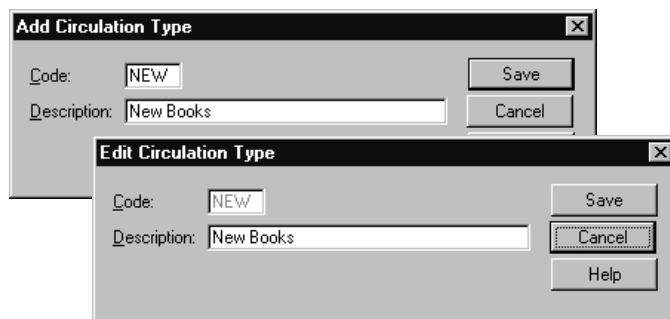
From this tab you can add, edit, or delete circulation types. You cannot, however, delete or edit the Regular (R), Non-circulating eBook (*NC), or Temporary (TEM)

circulation types. Circulation Desk automatically assigns the Temporary circulation type to temporary copies created during a checkout. You can also define any one of the Circ Types as the default. Cataloging then automatically assigns the default circulation type when adding or importing new copies to the collection that do not have a circulation type defined in the import file.

Note: You cannot delete a circulation type if it has copies assigned to it. To do this, you must first change the circulation type of the affected copies. If you have a PHD, you can do this by using Update Copies via PHD. For information about updating copies with a PHD, see “Using your PHD for mass updates,” page 338.

How to add or edit circulation types

1. To add a circulation type, choose New in the Circ Types tab. To edit a circulation type, select one from the list, and then choose Edit. The desired dialog appears:



Note: Once a circulation type is saved, you cannot edit its code.

2. Type a code and description that easily identifies the circulation type. When you finish adding or editing a circulation type, choose Save.

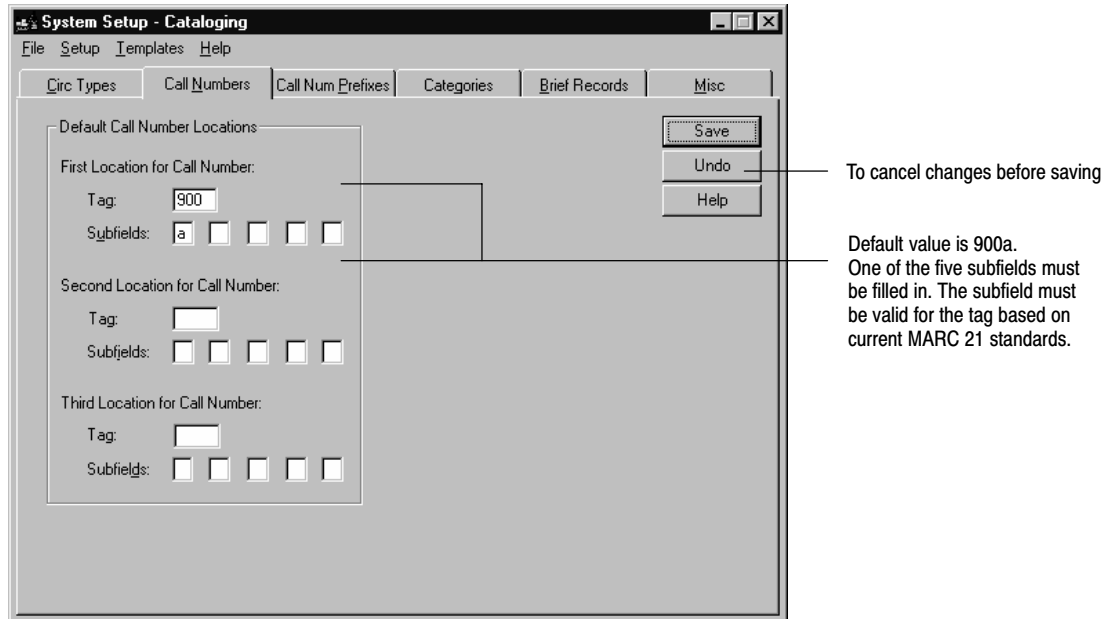
Identifying call number locations in your MARC records

When you create a copy record, unless you replicate an existing copy, Cataloging automatically retrieves the call number from the 900 tag in the copy's MARC bibliographic record. This saves you time because you don't need to retype the call number each time you create a new copy record.

System Setup allows you to customize Cataloging so that it looks for call numbers in up to three tags and in up to five different subfields for each tag. You will want to add other locations for the call numbers if the vendor of your MARC records puts the call number in a tag other than the 900, or if you are doing your own original cataloging and choose to put call numbers in another tag.

To set up the default call number locations, follow these steps:

1. From the Cataloging tabs in System Setup, select the Call Numbers tab:



2. In the Tag and Subfields text boxes, type the most probable locations for the call number in your MARC bibliographic records, and then choose Save.

Important: Enter the tag and subfield values in order of probability that a call number will be located in those locations.

Setting up your call number prefixes

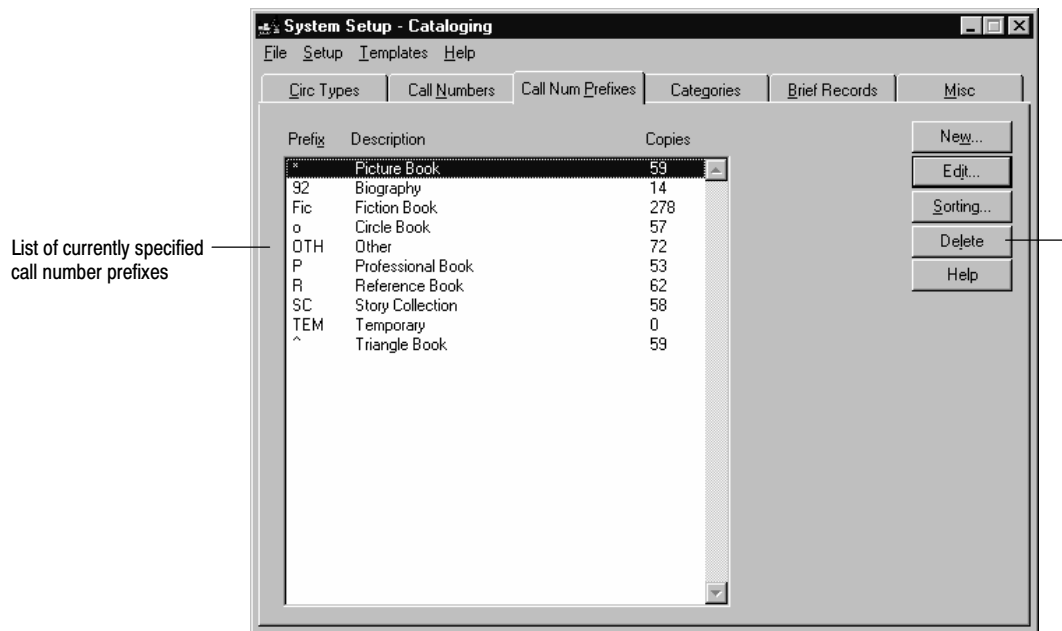
Call number prefixes are meaningful abbreviations typically used to help identify the location of a book in the library according to general content. Examples of common call number prefixes are BIO (Biography), E or EZ (Easy Reading), REF (Reference), and FIC (Fiction).

Circulation Plus/Catalog Plus use call numbers to collect circulation statistics and sort copy lists during searches and in reports (Bibliography Report, Inventory List by Call Number, and Shelf List). By creating specific call number prefixes in System Setup, you control how the library automation system collects statistics and sorts copy lists. For records with call number prefixes not defined in System Setup, Circulation Plus/Catalog Plus place the statistics under the OTH (Other) call number prefix. The system automatically tracks statistics for items using standard Dewey call numbers without prefixes.

You can also use the call number prefixes to sort copies. Using the custom sorting option (see "Sorting your call numbers" on page 51), you can adjust your sort order to match the bookshelves or to control reports of copies listed by call numbers. The default sort order is numbers followed by symbols and alphabetic characters.

If you want to use your call number prefixes to organize your collection by subject matter, we recommend you run the Copies With Other Call Numbers Report (see page 512) and address any copies in the report (change the prefixes used by the copies or add them to the prefix list maintained in System Setup).

To access your call number prefixes, select the Call Num Prefixes tab from the Cataloging tabs:



Deletes the selected call number prefix. If you delete a call number prefix, System Setup compares the deleted item to the remaining prefixes. If it finds a prefix consisting exclusively of the first, or first and second characters of the deleted prefix, it moves the circulation statistics to that prefix. Otherwise, System Setup moves the circulation statistics relating to the deleted prefix to the OTH (Other) prefix.

Important: Prefixes included in the Custom sorting list (see page 51) can't be deleted.

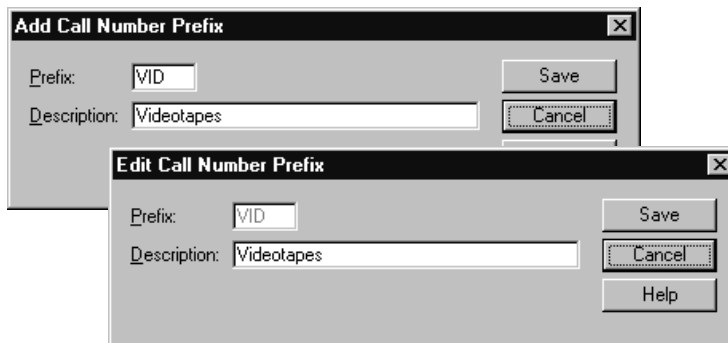
System Setup assigns the following default prefix codes automatically:

- OTH—(Other) used to track circulation statistics for copies that have a call number prefix that is not defined in the Call Num Prefixes tab.
- TEM—(Temporary) used to track circulation statistics for temporary copies that are created during checkout.

Note: You can neither edit nor delete the OTH and TEM call number prefixes. You can only edit the description of a call number prefix you have created.

How to add or edit call number prefixes

1. To add a call number prefix, choose New. The Add Call Number Prefix dialog appears. To edit the description of an existing call number prefix, select one from the list, and then choose Edit. The Edit Call Number Prefix dialog appears:



Note: Once a call number prefix is saved, you can edit the description, but you cannot edit the prefix. If a prefix is incorrect, delete the call number prefix and create a new one.

2. If you are adding a call number prefix, type up to three characters in the Prefix text box. A prefix can consist of any three characters with the exception of Dewey numbers (000-999), periods, and leading or embedded blank spaces. Whether you are creating or editing a call number prefix, type a description in the Description text box, and then choose Save.

Note: As you add each call number prefix, System Setup checks for any copies using the new prefix and moves any circulation statistics associated with those copies to the new prefix.

Important: In the interest of accurate statistics and reporting, you may want to define all the non-Dewey prefixes used in your collection. If you're a DX-enabled union member, your defined call number prefixes can also impact what data is exchanged.

If you define a prefix that consists exclusively of the first or first and second characters of undefined prefixes in your collection, the copies with the undefined prefixes will be grouped with the defined prefix. For example, defined prefix "B" would include undefined prefixes "BI" and "BIO."

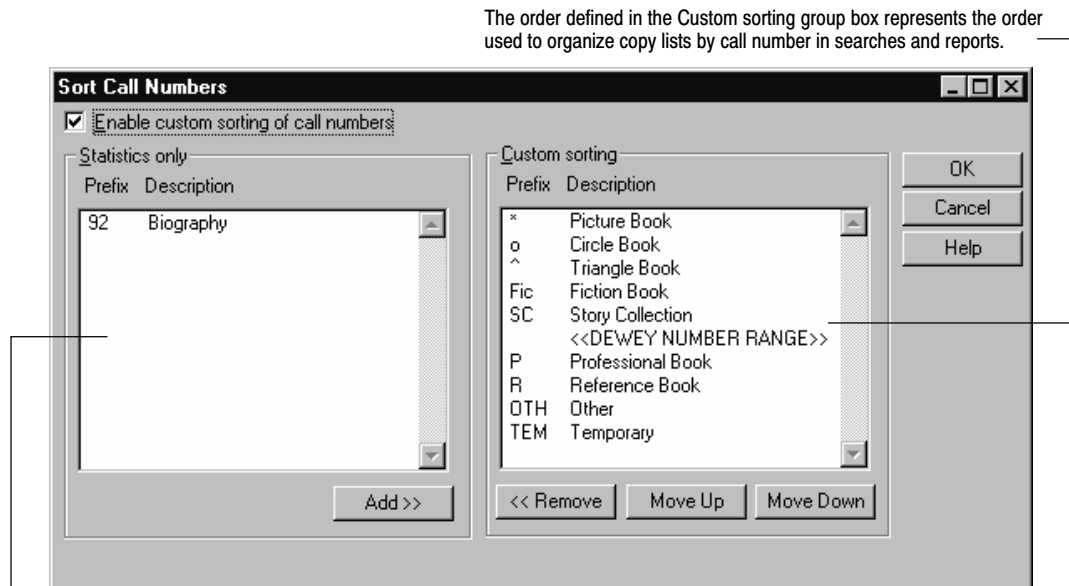
See also: If you notice that some copies in your collection are using variations of your defined call number prefixes (e.g., [Fic] vs. FIC), you can easily change them. See "Updating copy information globally" on page 326 for instructions.

If you're using the custom sorting option to organize your call numbers by prefix, any new call number prefixes are added to the Statistics only list. To place the new prefix in the desired sorting order, continue with "Sorting your call numbers" below.

Sorting your call numbers

1. To change your call number sorting order, from the Call Num Prefixes tab, click Sorting. The Sort Call Numbers dialog appears.

Note: If a partial inventory is in progress, System Setup will not allow you to change your call number sort order.



Any call number prefixes displayed in the Statistics only list are limited to collecting circulation statistics. They have no impact on sorting order. Circulation Plus/Catalog Plus incorporate copies using these prefixes into the sort order by comparing them to the prefixes in the Custom sorting list. If it finds a prefix consisting exclusively of the first or first and second characters used by the prefix in the Statistics only list, Circulation Plus/Catalog Plus sort those copies with that prefix. Otherwise, the copies are sorted with the OTH (Other) prefix titles.

2. If you want to use a customized call number sort order, the Enable custom sorting of call numbers check box must be selected. Highlight the desired call number prefix, and then use the Add, Remove, Move Up, and Move Down buttons to modify the sorting order.

Important: You'll need exclusive access to the library database if you want to save changes to the sort order. This means that no other Follett applications or services may be open on any workstation or search station. Rebuilding the call number headings may take a long time and cannot be interrupted.

3. When you have finished rearranging the call number prefix order, click OK. If you have modified the call number prefix sorting order, a message appears, informing you that System Setup must rebuild the call number index to use the updated sorting order.
4. Click Yes to proceed. The Rebuilding Call Number Headings progress dialog appears while the index is updated. When the process is finished, click Close.

Increasing access to your collection with categories

Circulation Plus/Catalog Plus let you create categories for your collection. You assign your categories to copies in your collection in Cataloging. Categories are most commonly used for report generation and curriculum support.

As an example of a report-based category, let's imagine that you wanted to see a list of books you purchased using money from an Olin Foundation grant. You would create a category, "Olin Foundation grant," and then assign that category to those copies as you purchased them. You would then generate a Titles by Category Report.

For an example of a curriculum-based category, let's look at a teacher's reading list. If you create a category for the books on Mr. Smith's biology class reading list, the Titles by Category Report you generate can then be distributed to Mr. Smith's students. Since copy call numbers are listed on the Titles by Category Report, students can go to the shelves to find the books on their reading list.

Another example of a curriculum-based category might be "Books about presidents." You can selectively assign this category to books that contain presidential biographies. When students are searching for report topics, your Titles by Category Report will save them time when finding the books they need.

The following is a list of additional reports, other than the Titles by Category Report, that you can generate according to category or limit by category: Bibliography, Inventory List by Title, and Circulation Statistics.

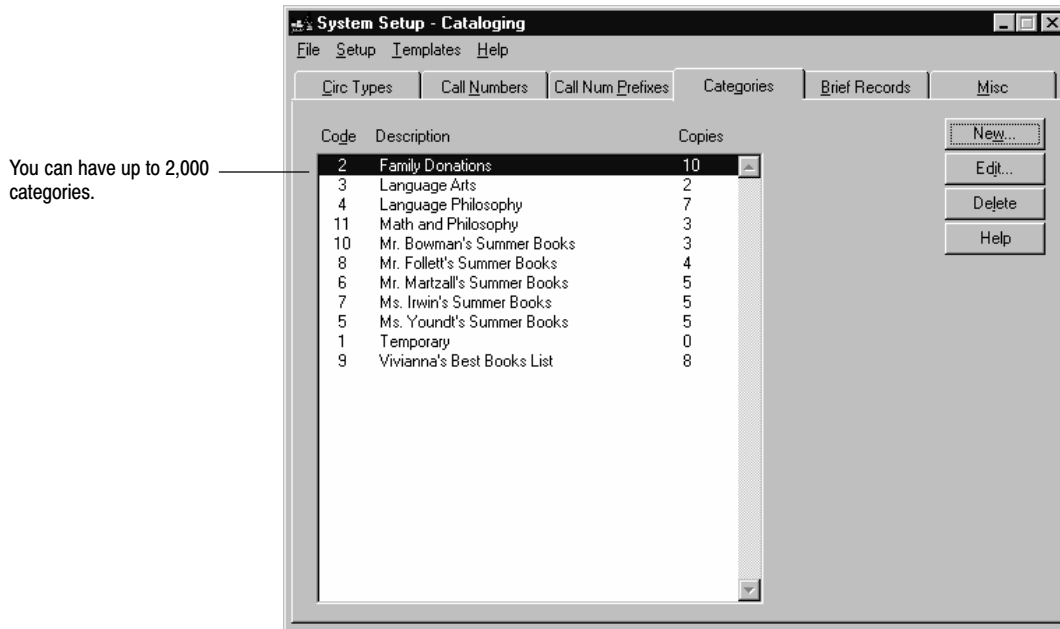
See also: For more information about the reports listed above, please see Chapter 37, "Cataloging reports," and Chapter 38, "Circulation reports."

In addition to reports, you can use categories for collection maintenance tasks. In Cataloging, you can specify a category or a range of categories when exporting MARC records or when adding them to the Book Cart for further processing.

If you have OPAC installed, you can quicken the search process by selecting Category as one of the search options available at a search station. For information about enabling category searches in OPAC, see "Choosing search options," page 410.

Except for self-generated categories created by Cataloging during MARC 21 import and the Temporary category, there are no default or built-in categories. If you import a MARC 21 record into Cataloging that contains a category code that doesn't already exist in System Setup, Cataloging creates a category with the description "<Code> <Added by Import>," where the code would be the category code number from the imported record. After the MARC records are imported, you can change this description to something meaningful to your collection. The Temporary category is automatically assigned to temporary items that are created in Circulation Desk during a checkout.

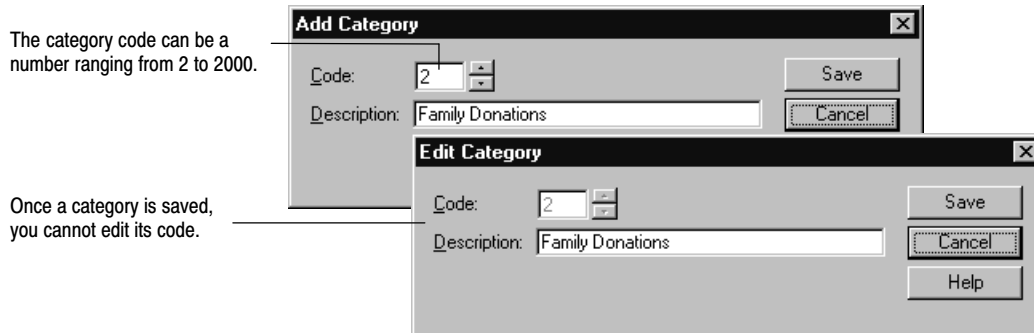
To access your categories, select Categories from the Cataloging tabs:



From this window you can add, edit, or delete a category. You cannot, however, delete or edit the Temporary category.

How to add or edit categories

1. To add a new category, choose New in the Categories tab. To edit a category, select one from the list, and then choose Edit. The desired dialog appears:



2. When you finish creating or editing a category, choose Save. The code and description appear in the Categories tab.

How to delete categories

1. On the Categories tab, select the desired category, and then choose Delete. A warning message appears, asking if you are sure you want to delete the category. Choose Yes. You will be asked if you want to continue. Choose Yes again. The Deleting Categories progress dialog appears.

When a category is deleted, the category is first removed from all of the copies to which it has been assigned. After the category is removed from all of its copies, the category itself is deleted. If you interrupt the deletion process by choosing Cancel in the progress dialog, System Setup does *not* go back and reassign that category to the copies from which it has already been removed. You will have to reassign the category to its copies based on your Titles by Category Report.

2. When processing is complete, choose Close in the Deleting Categories progress dialog.

Defining the tag range for your brief MARC records

System Setup allows you to set starting and ending tag numbers to determine if a record is brief or full. A brief record contains no information in the tags within the specified range. A full record does contain information in one or more tags in the specified range.

If you purchase Alliance Plus, changing the brief record range affects which titles are updated during an Autorecon. For more information about the Autorecon process using Alliance Plus, see Chapter 31, "Autorecon and Reading Program Recon."

You can also generate a Brief Records Report that lists brief records in your collection according to title. For more information about the Brief Records Report, see "Generating a Brief Records Report" on page 503.

Important: When redefining your brief record tag range, you must have exclusive access to the database. This means that no other Follett applications may be open at any workstation except for search modules, such as OPAC or WebCollection Plus. Redefining your brief record tag range may also take a long time. Once started, this process cannot be interrupted.

To change the tag range for a brief record, follow these steps:

1. From the Cataloging tabs, select the Brief Records tab:



The current values for the starting and ending tag numbers appear in the two text boxes.

2. In the first text box, type the first tag number for the range of tags to exclude from a brief record. In the second text box, type the last tag number for the range to exclude from brief records.
3. When you're finished, choose Save. An alert box appears, warning you that redefining your brief record tag range may take a long time. Choose Yes. The Brief Record Definition progress dialog appears.
4. When System Setup finishes processing, choose Close in the progress dialog.

Setting up miscellaneous Cataloging options

The options on the last Cataloging tab let you control a number of time-saving and search-enhancing features. You can choose the following:

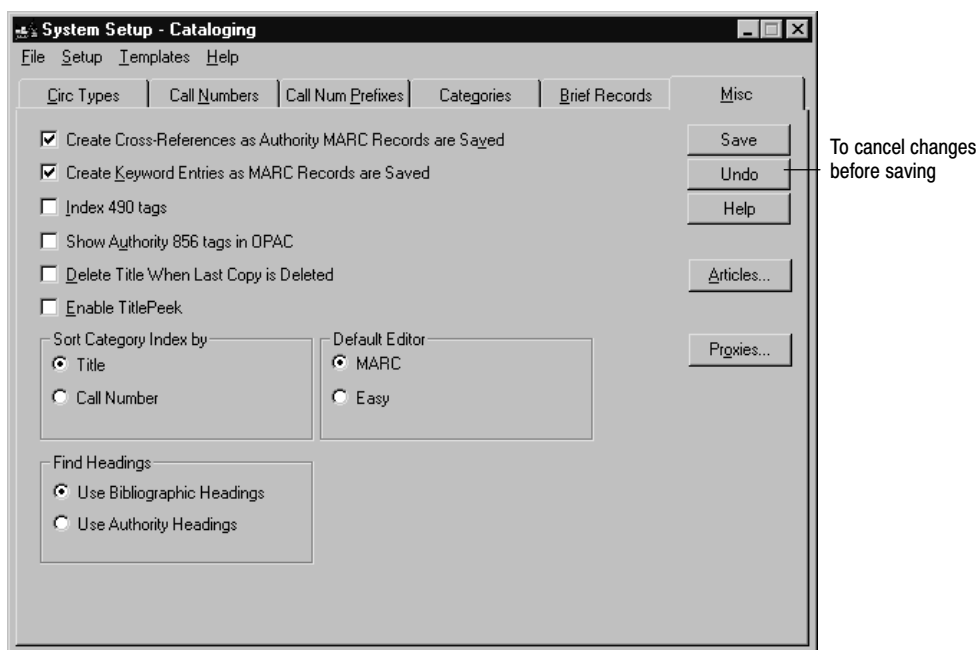
- Have keywords and cross-references created automatically.
- Include the series information cataloged in 490 tags in an index.
- Enable WebPath Express (formerly 856Express) entries or your own "virtual" 856 tags.
- Delete a MARC record automatically when its last copy is deleted.
- Enable the TitlePeek button in Cataloging and OPAC.
- Sort categories by either title or call number.
- Choose the MARC Editor or the Easy Editor as the default when adding or editing records.

- Choose either authority or bibliographic headings as the default for the Find Headings list.
- Determine how the applications handle leading articles (for example, A, An, The) during searches.
- Enter your proxy server information for Alliance Plus Online and TitlePeek.

You can set up all of these options on the Misc tab.

To set up any, or all, of these options, follow these steps:

1. From the Cataloging tabs, select the Misc tab. Select the options that meet your library's needs. For a description and important information for each option, see the following table.



| Option | Description |
|-----------------------------------|--|
| Create Cross-References... | Lets you build cross-references as you save or import authority records. If you <i>don't</i> choose this option, you can always use the Rebuild Cross-References feature in Cataloging (see page 346). |
| Create Keyword Entries... | Lets you update your keywords as you save or import bibliographic records. If you <i>don't</i> choose this option, you'll need to update the keyword index before new records can be found by a keyword search (see page 345). |
| Index 490 tags | Lets you find information in the 490 tag during series searches. Note: If you change this option, you <i>must</i> rebuild the Series MARC headings through Utilities before the change will appear (see page 596). |

| Option | Description |
|---|---|
| Show Authority 856 tags... | <p>Lets you display “virtual” Elec. Access hyperlinks in the OPACs, WebCollection Plus, and Cataloging (OPAC Display only). These virtual hyperlinks are created from information in the 856 tags of related authority records.</p> <p>If you subscribe to WebPath Express (formerly 856Express), you <i>must</i> select this option to make the WebPath Express hyperlinks appear. For information about adding 856 tags to your own authority records, see “Using ‘virtual’ 856 tags” on page 358.</p> <p>Important: If you have WebCollection Plus, you must stop and restart the WebCollection Plus service after selecting this option.</p> <p>Note: Whenever you click Save after turning off this option, you have the opportunity to delete any WebPath Express bibliographic records that may be in your database. Follett Software provides these records to WebPath Express subscribers to ensure at least one access point for each WebPath Express subject. They have little value without the virtual hyperlinks and can be easily re-imported if needed. If you choose <i>not</i> to delete these records (or cancel during processing) and later change your mind, simply enable this feature, click Save, and then disable it again.</p> |
| Delete Title When Last Copy is Deleted | <p>Automatically deletes a MARC record when the last copy attached to it is deleted. This occurs whether the copy is deleted manually or by a Cataloging feature such as Delete Copies via PHD. To globally delete existing titles without copies, see page 335.</p> <p>Note: In the MARC View window, before the actual deletion occurs, a confirmation message appears. This prevents unintentional deletions while you are cataloging.</p> <p>For Union Catalog Plus: Selecting this feature at the union has no effect on member databases; selecting it at the member has no effect on the union.</p> |
| Enable TitlePeek | <p>If you subscribe to TitlePeek, selecting this checkbox enables the TitlePeek button in Cataloging, the OPACs, and WebCollection Plus.</p> <p>For more information about accessing TitlePeek information, see page 250 for Cataloging and page 469 for the OPACs.</p> <p>Note: If you select “Disable access to other applications” on the General Setup tab in OPAC, the TitlePeek button does not appear in the OPACs.</p> |
| Sort Category Index... | <p>Lets you determine how category search results and the Titles by Category Report are sorted.</p> <p>Note: If you change this option, System Setup must reindex your categories. This means that no other Follett applications may be open except for search modules such as OPAC or WebCollection Plus. This process may take a long time and cannot be interrupted.</p> |
| Default Editor | <p>Lets you determine which editor appears when you click the +Title or Edit buttons in Cataloging.</p> <p>No matter which editor you choose as the default, both are available from Cataloging’s File menu. For more information about each, see Chapter 23, “Using the MARC Editor,” and Chapter 22, “Using the Easy Editor.”</p> |
| Find Headings | <p>Lets you determine the default list for the Find Headings feature. Set it to Bibliographic or Authority.</p> |

- By default, the Follett Software applications recognize the English articles (e.g., a, an, the) and ignore them if they are at the beginning of search terms. If you want to change how your applications handle articles, click the

Articles button on the Misc tab. Select the language options that meet your library's needs.

Select the language(s) whose articles you wish to recognize.

Note: If you change the language selection, System Setup must rebuild your keywords, which may take a long time.

Select this to ignore all recognized leading articles when searching for a title.

For a list of each language's articles, select Help.

Important: If the Remove leading articles option is selected, you must set the indicator for any nonfiling leading characters when you catalog titles (see "Editing indicators" on page 274). If you don't, you will have difficulty finding titles with leading articles.

3. After making your changes to your Articles setup, click Save. If you changed your language selection, System Setup will ask if you want to rebuild your keywords. To start the process, click Yes. When the process is complete, close the Update Keywords progress dialog.
4. If you cannot access Alliance Plus Online or TitlePeek even though you have a subscription to one or both services, you may need to enter your proxy configuration here. This information redirects the Alliance Plus Online or TitlePeek requests from your Windows workstations to your proxy server.

Please consult your technical coordinator before making this configuration. Make sure, also, that you have "write" access to the system folder. For more information about connection requirements, see Chapter 6, "Setting up online services," in the *Installation Guide*.

Click the Proxies button on the Misc tab.

Enter the address of your proxy server and its port number for these services.

Under TitlePeek, enter the IP address of your proxy server and either accept the default TCP port number of 80 or enter your custom port number. If your patrons also need access to TitlePeek, you need to enter this information in OPAC Setup (see page 405) at each Windows search station.

Note: On Macintosh computers, Cataloging and OPAC use the proxy settings in the Macintosh Internet Control Panel or in the Web browser when accessing TitlePeek. If the workstation or search station has access to the Internet, no additional configuration is necessary for TitlePeek.

Under Alliance Plus, enter the IP address of your proxy server again and accept the default TCP port number of 5151. If you have multiple cataloging workstations, at each one, you'll need to open System Setup and enter this information.

Important: If you *can* currently access Alliance Plus Online and TitlePeek, you do *not* need to change this proxy configuration.

Click Save to close the dialog box.

5. To save any changes you made to the Misc tab, click Save. If you made changes that require additional processing (see the previous table for details), System Setup prompts you to complete the processing. Once a process is complete, close the progress dialog.

Note: If you changed the Sort Category Index option, remember that the reindex process requires you to close all other Follett applications (with the exception of search modules, such as OPAC).

After preparing for cataloging

After completing the tasks in this chapter, you are ready to start creating (see page 263) or importing (see page 289) MARC records.

Note: If you are importing MARC authority as well as bibliographic records, and you've chosen to generate cross-references automatically, you should import your bibliographic records first.

Before creating new MARC records, you should consider the following tasks:

- Customize your MARC bibliographic and authority templates (not available for Mac OS). For more information about customizing your templates, see Appendix C, "Bibliographic and authority templates."
- Provide a copy of the Code Table List (see page 504) to the individuals doing the actual cataloging. This report shows a listing of all the codes and descriptions for the circulation types, categories, and call number prefixes you defined in this chapter.

If you purchased Circulation Plus, you still need to complete the tasks in Chapter 5, "Preparing to circulate your collection."

If you purchased Catalog Plus, you also need to complete the tasks in Chapter 4, "Setting up Acquisitions," and Chapter 33, "Setting up your search stations."

Notes

Chapter 4 Setting up Acquisitions



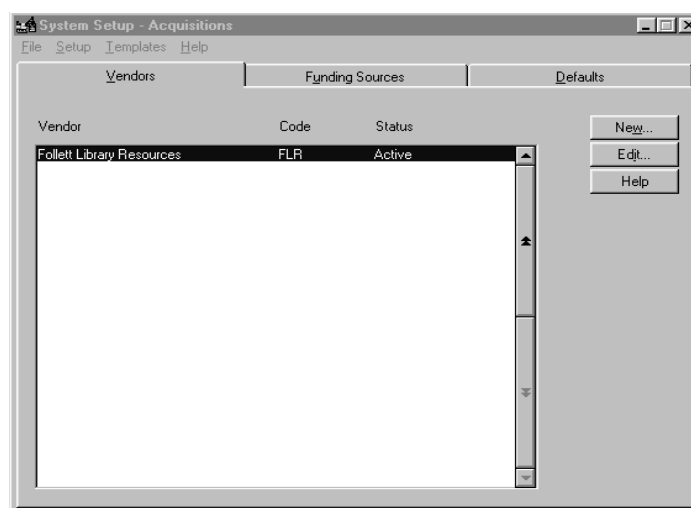
The Acquisitions setup tasks you need to perform are relatively easy. Because the Acquisitions feature allows you to create book orders and track orders and funding sources, it is helpful if you have all information pertinent to particular vendors and funding sources. This information includes names, addresses, phone numbers, Tax ID numbers, and allocated funding source amounts.

Setting up a list of vendors and funding sources in Acquisitions allows you to create new orders, accurately track existing orders, and maintain all pertinent acquisitions information in one place. Once set up, Acquisitions is available from the menu of your Cataloging module.

Adding vendors

The first tab in Acquisitions setup is the Vendors tab. Here you establish and maintain a list of vendors. By default, your Circulation Plus/Catalog Plus modules come with Follett Library Resources listed as a vendor.

Note: If you are upgrading, existing vendors defined in your copy records are not automatically added.



1. To add a vendor to the list, click New.

2. Enter a vendor description.
3. Enter a one-to-three character alphanumeric code.
4. Federal Tax ID information is available from the vendor.

Note: Currently, there is no capability to delete vendors. Use the Status switch to make a vendor you no longer use Inactive.

5. Account Number is a previously-established account number that you have with a specific vendor. This is *not* your Follett Customer Number.
6. Clicking Address opens a new window where you enter the vendor's address.

7. After entering vendor address information, click OK.
8. Click Save on the Add Vendor dialog.

Note: We recommend that you click Save at each stage (tab) when adding a vendor. If you decide to cancel an addition at any point, NONE of the changes are saved.

Contact tab

There are three extra informational tabs available for Add/Edit Vendors: Contact, Notes, and Purchases. The Contact tab is where you enter information for the person with whom you communicate.

| Contact | Notes | Purchases |
|--------------|----------------------|-----------|
| Contact Name | <input type="text"/> | |
| Title | <input type="text"/> | |
| Phone | <input type="text"/> | |
| Fax | <input type="text"/> | |
| Email | <input type="text"/> | |

Notes tab

Clicking on the Notes tab on your Vendor window opens a free-form text entry box where you can type in any notes you want to store about that vendor.

| Contact | Notes | Purchases |
|--|-------|-----------|
| <div style="border: 1px solid gray; padding: 5px;"> <!-- Free-form text entry box --> </div> | | |

Purchases tab

Clicking on the Purchases tab displays monetary amounts associated with orders with that vendor. These amount fields are read-only and display the following information:

| Contact | Notes | Purchases |
|--|-------------------------------------|-------------------------------------|
| Open Orders | <input type="text" value="\$0.00"/> | Issued Orders |
| | | <input type="text" value="\$0.00"/> |
| | | Closed Orders |
| | | <input type="text" value="\$0.00"/> |
| <input type="button" value="Recompute"/> | | Total Issued or Closed |
| | | <input type="text" value="\$0.00"/> |

- Open Orders—a total amount of all orders with a status of Open
- Issued Orders—a total amount of all orders with a status of Issued

- Closed Orders—a total of all orders with a status of Closed
- Total Issued or Closed—the combined total of all Issued and all Closed orders for that vendor

Click Save to save your changes.

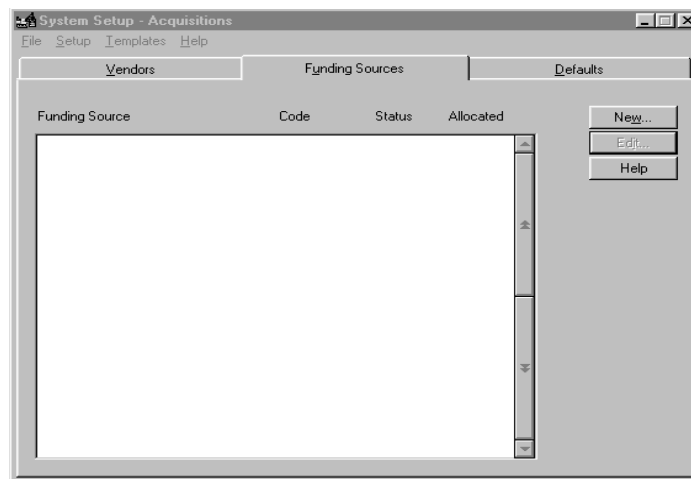
Note: We recommend that you click Save at each stage when adding a vendor. If you cancel an addition at any point, none of the changes are saved.

Clicking the Recompute button updates the figures in the previously-mentioned fields to display any changes. These new recalculated figures are read-only and are not saved by the system.

Adding funding sources

Clicking the Funding Sources tab opens a window for adding funding sources to a list. Funding source information on this window includes the source description and associated code, the status, and total funding allotment.

Note: If you use year-to-year funding source data, you may want to describe your funding source as “funding source 2002,” for example, to distinguish fiscal year changes in this information.



To add funding source information, click New from the Funding Sources tab.

1. Add your funding source description (name).

2. Enter a code specific to that funding source (1-3 alphanumeric characters).
3. If you have a funding source that you are no longer using, set the Status to Inactive. (Currently, there is no capability to delete funding sources.)

Amount tab

The Amount tab allows you to add or update funding source monies. The add/edit amount fields are defined as follows:

- **Allocated:** The total amount allocated to this source (may be set to zero).
- **Committed:** The total of the orders for this funding source with a status of Open, Issued, or both. Represented in both dollars and percentage. Resets to zero each time you click Edit in the Funding Source window.
- **Spent:** The total amount of orders for this funding source with a status of Closed. Represented in both dollars and percentage.
- **Remaining:** The total amount allocated minus the committed amount.

Note: We recommend that you click Save at each stage of an addition. If you decide to cancel an addition at any point, none of the changes are saved.

Notes tab

Use the Funding Source Notes tab to capture any notes you want to store for a particular funding source. This is a free-form text entry field.

Note: We recommend that you click Save at each stage of a funding source add. If you decide to cancel an add at any point, none of the changes are saved.

Setting the default information

The Acquisitions Defaults tab is where you enter any ship-to/bill-to information you want to use for ordering. This information includes the information a vendor would need to contact your school or library. By default, contact person name and school address established in Site Setup populate this tab, but this information is editable.

1. Enter the name of the person at your school or library who the vendor would contact concerning an order.
2. Enter the contact person's telephone number.
3. Enter the contact's Fax number.
4. Enter the contact's email address.
5. Click Bill To to enter address information in a free-form text box.

6. If the bill-to address is the same as the ship-to address, check the Same As Bill To Address check box. If not, click Ship To and enter the ship-to address.
7. Click Save.

Note: We recommend that you click Save at each stage of a Defaults add. If you decide to cancel an update at any point, none of the changes are saved.

Once you have established vendor and funding information in System Setup, that information is available from Cataloging to help you create book orders. You can update this information from Cataloging as well. Changing default information will only affect new orders.

Notes

Chapter 5 Preparing to circulate your collection

The setup features discussed in this chapter include ways to do the following: group your patrons for circulation purposes; make it easier to create new patrons; set up your circulation policies; set time limits for items on hold and on reserve; activate automatic fine calculation and refunds; customize your overdue, bill, and hold notices; set up your library's hours and current calendar; and set up alert sounds for your circulation desk.

Important: You must set up the alert sounds at the workstation where you will be using Circulation Desk.

Grouping your patrons by type

As you already know, the checkout period for a book or other library item is partially determined by who is trying to check out the item. Circulation Plus lets you create as many groups of patrons as you need to describe the various types of patrons who use your library. These groups are called patron types.

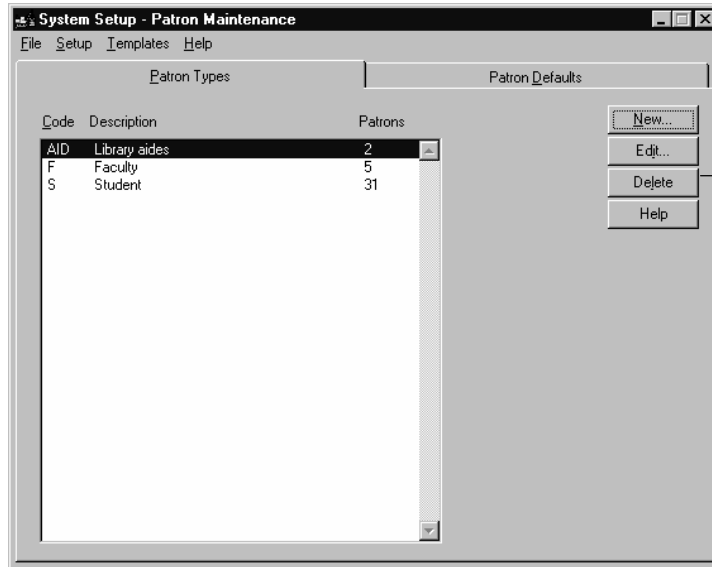
See also: For more information about how patron types relate to checkout periods, see "Circulation policies: who can have what and for how long" on page 76.

The patron types you create are also important for statistical reasons. The Checkouts/Fines Transactions Report, Patron Cards, and the Overdue/Bill and Hold Notices can all be limited according to patron type. You can also limit the Patron Name List according to patron type.

You assign a patron type to a patron when you add a patron record. You can then use patron types for global editing and updating of patron records. For more information about globally editing patron records, see Chapter 16, "Maintaining patron records in batches."



To access your patron types, select Patron Maintenance from the Setup menu in the System Setup module. If you have defined a password for Patron Maintenance, a password dialog appears. The default password for Patron Maintenance is **MODPATRON**. Type the password in the text box, and then choose OK. The Patron Maintenance tabs appear with the Patron Types tab open:



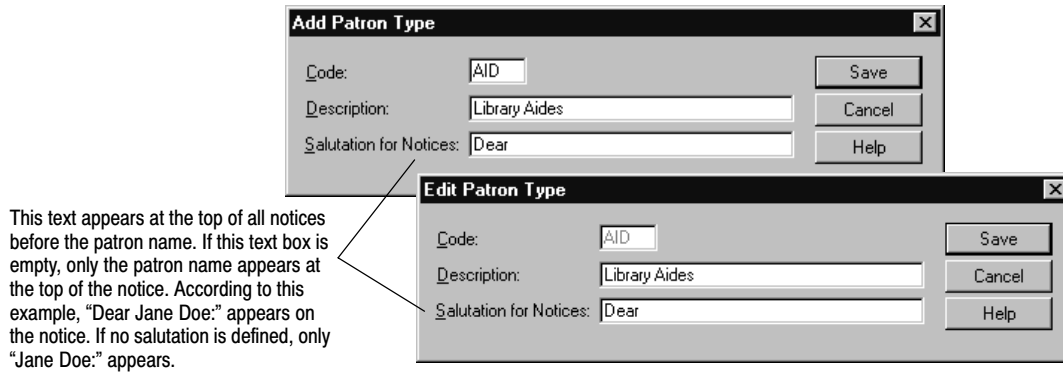
To delete the highlighted patron type

From this window you can add, edit, or delete a patron type. You cannot delete the Student (S) or Faculty (F) patron types or the patron type that has been defined as the default on the Patron Defaults tab. However, you can change the description of the Student (S) or Faculty (F) patron types. When you add or edit a patron type, you can also create or edit the salutation that appears on all notices you send to patrons of this type.

You cannot delete a patron type if there are patrons assigned to it. To do this, you must first assign the patrons to a different patron type using global editing in Patron Maintenance.

How to add or edit a patron type

1. To create a patron type, choose New in the Patron Types tab. To edit a patron type, select the patron type from the list, and then choose Edit. The desired dialog appears:



Note: Once a new patron type is saved, you cannot edit its code.

2. When you finish creating or editing a patron type, choose Save.

Making it easier to create new patrons

There are a few options in System Setup that enable you to create new patrons faster and make it easier to find patrons when searching for them.

To set up these options, follow these steps:

1. From the Patron Maintenance tabs, select the Patron Defaults tab:

These prompts apply to all patron types and appear in the Edit Patron and Patron Information dialogs. Location 1 appears in the patron information box of the Circulation Desk windows.

Select the check box to give your patrons access to the login features in OPAC. Choose the password they must enter along with the barcode or ID required above.

Select to allow your patrons to view their own information and/or place holds in OPAC.

Select the patron type representing your most frequent library visitors.

To cancel changes before saving

Select the unique identifier for your patrons. When you create or import new patrons, either the barcode, the ID, or both are required before you can save the patron record.

2. In the User-Defined Patron Field Names box, position the cursor in a text box and type a prompt that is appropriate for all your patrons. These appear in Circulation Desk, Patron Maintenance, OPAC, and on some reports.

The User-Defined Patron Field Names are indexed in your patron database so that you can use them to search for patrons in Circulation Desk. You can generate the following circulation reports sorted by the User-Defined Patron Field Names: Checkouts/Fines Transactions, Hold Notices, Overdue/Bill Notices, Patron Barcode List, Patron Cards, and Patron Name List.

The Location and User Field prompts you enter in the Patron Defaults tab appear in the Edit Patron dialog in Patron Maintenance:

When you retrieve a patron in Circulation Desk, the Location 1 prompt appears in the patron information box:

3. In the Required Patron Field(s) box, select the way you want to identify your patrons: barcode, ID, or both. Your selection here determines what information is required in order to save a patron record and could impact the way you retrieve patrons in Circulation Desk. It also determines one of the fields that the patron must enter when logging on at a search station.

Regardless of which field you require when saving a patron record, you can retrieve a patron in Circulation Desk by either his barcode or ID. However, in order to retrieve a patron by his ID, you must precede the ID by a forward slash, "/". If you print your patron IDs as barcodes so that you can scan them, you must precede the ID by a forward slash. This could impact the symbology you choose. For more information about retrieving patrons in Circulation Desk, see "Transactions 101" on page 122.

4. From the Default Patron Type list, select your most common patron type. Whenever you add a patron, Patron Maintenance automatically assigns this type to the new patron record. When you import patron records that don't have patron types, this patron type is assigned to those records.

Empowering your patrons

You can allow your patrons to log on at the search stations. You can choose to allow them to view their checkouts, fines, and holds, and to place actual holds and reserves. Just choose the applications where logging on is allowed, set up the password field, and choose the allowable activities.

To set up this option, follow these steps:

1. In the Patron Empowerment box, choose whether to allow your patrons to log on to the OPAC or to WebCollection Plus or both.
2. Choose the Password field. To log on, the patron must enter the barcode or ID that you specified in the Required Patron Field(s) box, above, (if your Required Patron Fields are Barcode *and* ID, you can choose either), plus the password field you select from the dropdown list: Last Name, First Name, Location 1 or 2, User Field 1 or 2, or Birth Date.
3. Select one or both check boxes to allow patrons to view their own information—checkouts, fines, holds, and reserves—or to place actual holds and reserves.

When you choose to allow patrons to view their information, patrons have access to the Patron Information dialog after logging on. They can view, however, only three of the seven tabs on that dialog: Checkouts, Fines, and

Holds. They cannot view any other tab or any fine notes you have created. In WebCollection Plus, the tabs appear as one page.

Patron Information

Patron Name: Ambriz, Claudia Anne Homeroom: Maroney
 Barcode: P 6154 ID: Card Expiration: 6/30/2008
 Status: Active Type: Student Grad Year: 2008

Close Print... Help

Checkouts

| Title | Price |
|--------------------------------------|---------|
| Jack, Skinny Bones, and the golden p | \$0.00 |
| Misty's twilight | \$0.00 |
| 48 goes wild | \$13.60 |
| Deep down underground | \$12.56 |

Library Search

Enter search words:

Keyword Title Author Subject Series Call Number Category Power Limiters My Info Log Out Bookbag Help

Patron Information Printer-friendly

Patron Name: Freedman, Sally J. Card Expiration: 06/30/2005

Checkouts

| Title | Call Number | Barcode | Due Date | Pending Fine | Price |
|--------------------------|-------------|---------|------------|--------------|--------|
| Margaret and I, a novel. | 813.5 WIL | T 57100 | 11/15/2002 | \$0.70 | \$0.00 |
| The book of nothing | 513 BAR | T 57098 | 12/02/2002 | | \$0.00 |
| Freddie Q. Freckle | E MES | T 57097 | 12/02/2002 | | \$0.00 |

Note: As of today, you have a total of \$0.70 in pending overdue fines. Items returned after today will increase your fine.

Fines

| Title | Call Number | Barcode | Amount Due |
|-----------------|-------------|---------|------------|
| Copying charge | | | \$0.60 |
| The friendship | F TAY | T 11666 | \$0.60 |
| A jar of dreams | F UCH | T 9165 | \$0.60 |

Holds/Reserves

| Title | Call Number | Placed On | Expires | Status |
|----------------------------|-------------|-----------|------------|----------|
| I love you, Blue Kangaroo! | | Any | 12/05/2002 | Ready |
| The story of Muhammad Ali | | Any | 12/09/2002 | Pending |
| The wonder of whales | | Any | 12/09/2002 | Pending |
| Wild about fudge | 641.6 MYE | Copy | 12/20/2002 | Reserved |

Key: = Damaged = Lost = Overdue = Refund

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If you choose to allow patrons to place holds and reserves, Hold/Reserve buttons appear on the OPAC's selection list and on the record display window. In WebCollection Plus, a Place Hold/Reserve button appears on the Title Information page. Clicking a button brings up the New Hold/Reserve dialog.

Please note that patrons can place *actual* holds and reserves, not *requests* for holds and reserves. For more information on using Patron Empowerment, see page 472.

Enabling Patron Empowerment here automatically adds the My Info and Log Out toolbar buttons in the OPACs and in WebCollection Plus, and options in the OPAC's Tools menu.

Please note that this feature does not affect the Hold and ILL request options in WebCollection Plus.

When you are finished selecting your Patron Defaults, choose Save.

Circulation policies: who can have what and for how long

Now that you've completed setting up your circulation types and your patron types, you're ready to take your existing circulation policies and define them in System Setup. The circulation policies you establish in System Setup are used by Circulation Desk to automatically monitor and control checkouts, renewals, fine calculations, refunds, holds, and reserves.

To give you an overview, you determine a set of circulation policies based on the patron types you created at the beginning of this chapter. For each patron type, you assign maximum numbers for checkouts, overdues, holds/reserves, and unpaid fines.

When a patron reaches one of the limits for his type, a block condition occurs during the next transaction. Circulation Desk alerts you with a message. You must address the block condition or override it with the Circulation Desk Override password before continuing with the transaction. For more information, see "Handling block conditions during a transaction" on page 127.

You will also be creating loan periods for each patron type based on the type of item the patron is checking out. If you did not create your circulation types in Chapter 3, do so before establishing your circulation policies.

The following table shows an example of how patron types and circulation types work together when you create your circulation policies:

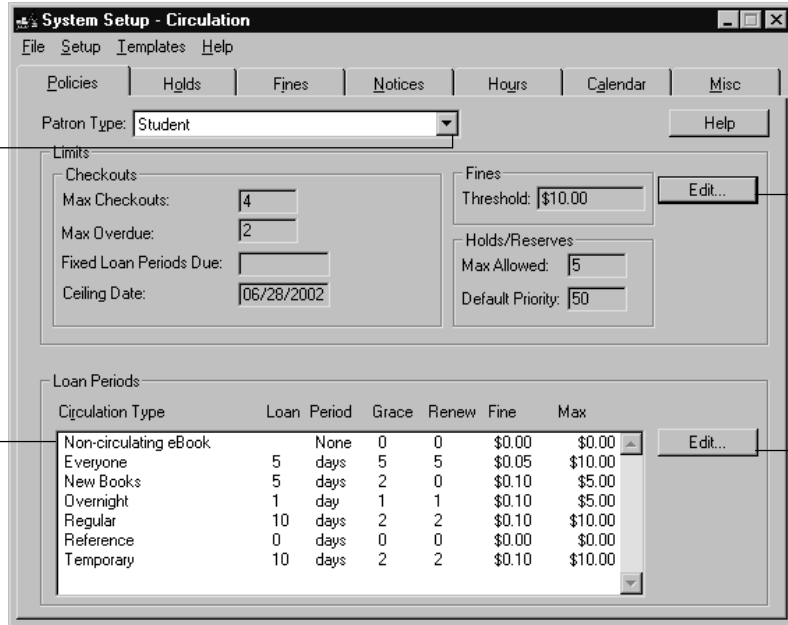
Loan policy creation—example

| Patron type | Circulation type | Your loan periods |
|-------------|------------------|---|
| Faculty | Regular | Fixed—the last day of the current semester or school year |
| | New Books | 40 days |
| | Reference | 12 hours |
| Student | Regular | 20 days |
| | New Books | 10 days |
| | Reference | 2 hours |



To access your circulation policies, from System Setup, select Setup | Circulation. If you defined a password for Circulation Setup, a password dialog appears. The default password for Circulation Setup is **SOBEIT**. Type the password in the text box, and then choose OK. The Circulation tabs appear with the Policies tab open:

To view the policies for a patron type, select the patron type from this drop-down list.



To set up the circulation limits for the selected patron type

You cannot edit the loan period for non-circulating eBooks.

To set up the loan periods for the selected patron type/circulation type combination

From this tab you create or edit your circulation limits and your circulation periods for your patron types.

How to set circulation limits for patron types

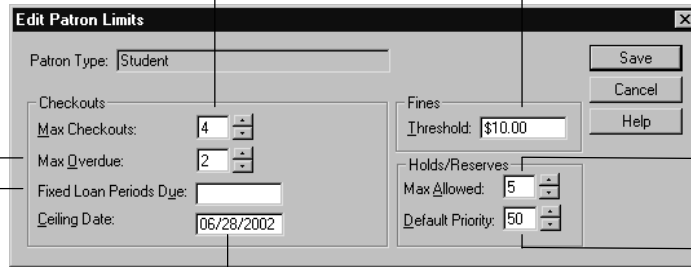
1. From the Policies tab, select the patron type for which you want to establish limits from the Patron Type list. In the Limits box, choose Edit. The Edit Patron Limits dialog appears:

The maximum number of checkouts for this patron type

The maximum amount of unpaid fines that a patron of this type can accumulate

The maximum number of overdue items for this patron type

To use a specific date for checkouts of items belonging to a circulation type, enter that date here. Then set the loan period of that circulation type to Fixed in the Edit Loan Period dialog (see the next section). Make sure to change this date each year. Circulation Desk does not do so automatically.



The maximum number of items that patrons of this type can have on hold or on reserve

The default priority for holds placed by patrons of this type. The lower the priority value, the higher the hold is in the queue. Enter a number between 1 and 99.

The ceiling date overrides the due date calculated by the system if this date is earlier than the calculated due date. A commonly used ceiling date is the last day of school so that all items are due the last day of school, no matter what their calculated due date would be. Make sure to change this date each year. Circulation Desk increments the year if needed, but the date may not be correct for your school year.

2. In the text boxes, type the circulation limits that you want applied to patrons of this type, and then choose Save to return to the Policies tab.
3. Go back to step 1 and repeat this process for the remaining patron types.

How to limit loan periods

1. In the Policies tab, select the patron type you want to establish loan periods for from the Patron Type list. All of the circulation types appear in the Loan Periods box. Select the circulation type for which you want to define loan periods, and then choose Edit in the Loan Periods box. The Edit Loan Period dialog appears:

The length of checkout (days, hours, or fixed). If you choose fixed, all items of this circulation type will be due on the fixed due date you established in the patron type limits for this patron type.

Maximum number of renewals for this circulation type for this patron type

The amount charged per day, or hour, for overdues

The number of days, or hours, a patron has to return an overdue without incurring a fine

The maximum fine amount a patron of this type can be charged for a single item of this circulation type

Maximum number of checkouts for this circulation type. The number cannot exceed the maximum checkout limit for this patron type.

Note: The amount you type in the Fine Increment text box should not exceed the amount you type in the Fine Limit text box.

2. When you finish establishing the loan period limits for this circulation type for the selected patron type, choose Save. The Policies tab appears showing the modified information.
3. To set up another circulation type for this patron type, select the circulation type from the Loan Periods box and repeat filling out the Edit Loan Period dialog. Repeat this process until you have established loan periods for all circulation types for each patron type.

Note: You cannot set up loan periods for the Non-circulating eBook (*NC) circulation type. *NC is intended for eBooks, or other electronic resources, that are non-circulating, non-inventoried, and non-holdable.

Setting time limits for items on hold

When a patron places a hold or reserve on an item, it is entered in the holds/reserves queue.

- A hold is ready if the item is available. If it is not, the hold is pending.
- A reserve is inactive until the pre-reserve processing date. When that date arrives, the reserve is ready if the item is available, pending if it is not.
- A pending hold or reserve becomes ready when the item becomes available.
- A hold expires according to the time limits you set on this tab.
- A reserve automatically expires the day after the end of the reserve period.

To keep the hold queue from building up with holds that are not retrieved or fulfilled, System Setup allows you to set time limits on them.

Expiring holds

After the assigned number of days, Circulation Desk expires a hold. By expiring a ready hold that has not been picked up by the patron, Circulation Desk can make the next pending hold ready, giving the next patron in the queue the opportunity to check the item out. By expiring a pending hold, Circulation Desk assumes that, since a lengthy time has elapsed, the patron no longer wants the item.

You can revive expired holds – that is, make them pending again; Circulation Desk has not yet deleted them. If you do so, Circulation Desk makes them ready if and when the item becomes available. You cannot, however, revive reserves.

Deleting holds

To keep expired holds from building up in the queues, System Setup allows you to assign a time frame for automatically deleting expired holds.

Expired holds are deleted from the system when Circulation Desk is started at the beginning of each day. Any holds that are deleted are listed on an exception report. For information about the Daily Holds Processing exception report, see “Interpreting the Daily Holds Processing exception report” on page 171.

Please note:

- You can revive expired holds; you cannot revive deleted holds.
- You can edit the expiration date of a hold, either before or after it expires.
- You can edit the priority of a hold.

Setting up reserves

A reserve is slightly different from a hold. A patron places a hold when he would like to have the item as soon as possible. For a reserve, a patron specifies a future date when he would like to have the copy.

The copy’s status is unaffected by the reserve until the pre-reserve processing date arrives. On that date, when processing reserves, the Daily Holds Processing initially changes the reserve status to pending. When processing holds, it changes the reserve status to ready and the copy status to On Hold, if the item is available. If the item is unavailable, the reserve status remains pending until it is available.

System Setup allows you to set the number of pre-reserve processing days. This allows you time to locate the reserved copies, place them on the hold shelf, and remind the patron to retrieve them.

Example: If you enter **2**, the Daily Holds Processing exception report alerts you to an upcoming reserve 2 days before the reserve date. Because the copy status of an available item becomes On Hold that day, any attempted transaction on the reserved item causes Circulation Desk to display an alert message.

A reserve has a reserve period equal to its loan period. For example, if a patron reserves an item for March 18th, and the loan period is 10 days (2 weeks) for that circulation type, the reserve period is March 18-April 1. A reserve automatically expires a day after the end of the reserve period. For more information about reserves, see “A brief introduction to reserves” on page 166.

Entering the time limits

To set up the time limits for items on hold and the number of processing days needed for preparing reserves, follow these steps:

1. From the Circulation tabs in System Setup, select the Holds tab:

The number of days a hold remains pending before expiring

The number of days a hold remains ready before expiring

The number of processing days you need to prepare a reserve

To activate automatic deletion of expired holds and reserves

The number of days the expired holds and reserves remain in the queue before being deleted

To cancel changes before saving

2. In the Holds tab, set up your time limits for pending and ready holds, and decide if and when you want Circulation Desk to delete expired holds and reserves automatically.
3. Select the number of pre-reserve processing days that you need to make a reserve ready for retrieval by the patron. On that day, the Daily Holds Processing changes the copy status to On Hold and the exception report lists the upcoming reserve.
4. When you're finished, choose Save.

See also: For more information about deleting holds manually, extending hold expiration dates, and processing reserves, see Chapter 12, “Managing holds.”

Activating automatic fine calculation and refunds

System Setup lets you decide whether you want to charge fines, and if so, how they're calculated. Depending on library policy, you may not want all fine options active.

You can create additional fine types as needed. Unlike the default fine types of Damaged, Lost, Overdue, and Refund, user-defined fine types are not associated with copy information.

To set up the fines options, follow these steps:

1. From the Circulation tabs in System Setup, select the Fines tab:

To activate automatic calculation of overdue fines

To increment overdue fines, even on grace days

To increment overdue fines, even if the library is closed

To generate a refund whenever a partially paid fine (overdue, damaged, lost, or used-defined) is deleted in Circulation Desk

To add a new fine type to the list, click New. Highlight an existing fine type and click Edit to change the fine type description (no duplicates). You cannot edit default fine types or codes for user-defined fine types. To edit a user-defined code, delete the fine type and create a new fine type and code.

To use the Fine Limit, specified in the Edit Loan Period dialog, as the replacement cost for lost copies that do not have a price recorded in their copy records

To cancel changes before saving

| Code | Description |
|------|---------------------|
| BND | Band Uniform Rental |
| DAM | Damaged |
| LOS | Lost |
| OD | Overdue |
| REF | Refund |

2. Select the fine options that correspond to your current policies, and then click Save. For more information about fine options, see the following table.

| Option | Selected | Cleared |
|--|---|---|
| Include grace days in fine calculation | Example: A copy is due on Monday, but not returned until Thursday. There is a two-day grace period and a \$0.10 fine increment for this patron type. The patron is charged \$0.30 for the overdue copy. | Example: A copy is due on Monday, but not returned until Thursday. There is a two-day grace period and a \$0.10 fine increment for this patron type. The patron is charged \$0.10 for the overdue copy. |
| Include closed days in fine calculation | Example: You are closed for the weekend. A copy is due on Friday, but not returned until Monday. If there are zero grace days for this transaction situation, then the patron is charged \$0.30 . If there is a one-day grace period in effect, and grace days are not included in fines, the patron is charged \$0.20 . | Example: You are closed for the weekend. A copy is due on Friday, but not returned until Monday. If there are zero grace days for this transaction situation, then the patron is charged \$0.10 . If there is a one-day grace period in effect, and grace days are not included in fines, there is no charge . |
| Use fine limit if the copy price has not been entered | The fine limit is the most money a patron can be charged for a single copy. If this is selected, and you choose to show the copy price on Notices, then the fine limit also appears on Notices if no copy price is specified. In addition, if this is selected, the fine limit is used when you create a lost copy fine if there is no price. | No predetermined fine is charged for a lost copy. You type the amount you want charged at the time the lost copy fine is created. |

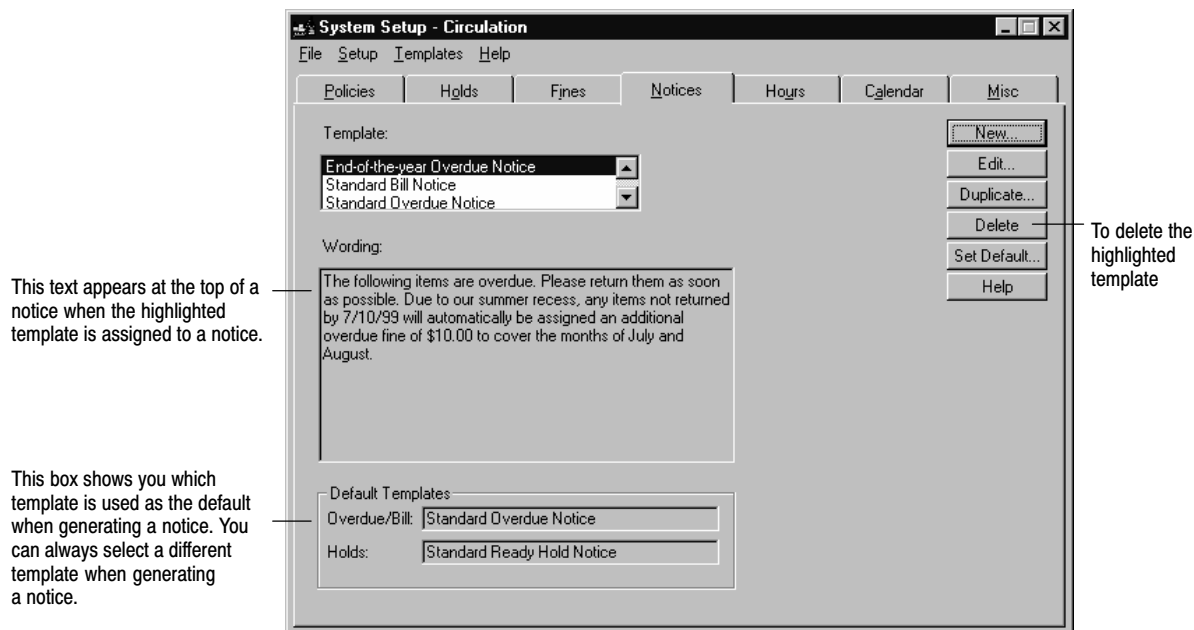
Note: Currency format changes are defined in Windows from the Control Panel | Regional Settings Properties | Currency tab. On Mac OS, you change the currency format through the Numbers Control Panel.

Customizing your overdue, bill, and ready hold notices

When you print out a notice, the message at the top of the notice states the reason you are sending the notice and the urgency with which the recipient should treat it. Circulation Plus allows you to customize the message. For example, you might want your overdue notices to include a special message before the summer break to make sure that all of your overdue items are returned before the break begins.

When Reports creates a notice, it takes the wording that appears at the top of the notice from a notice template. Circulation Plus comes with three standard templates. To create your own notice templates and to edit those templates when needed, use the following instructions.

To access your templates, select the Notices tab from Circulation in System Setup:



The following table lists the wording of each of the standard notice templates:

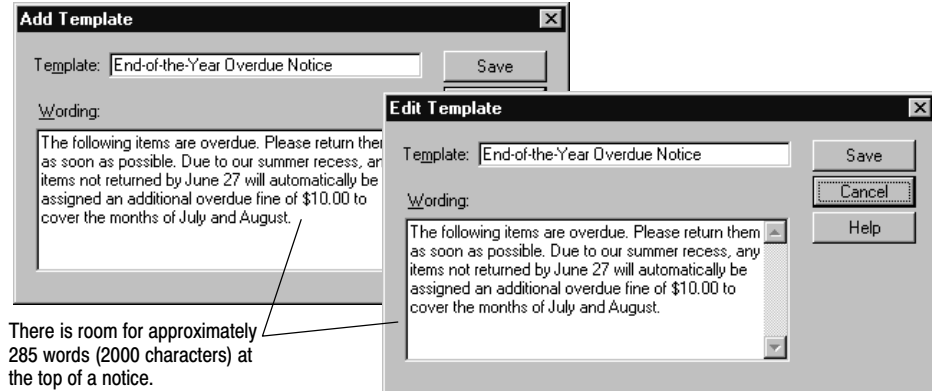
| Template | Wording |
|----------------------------|--|
| Standard Bill Notice | The following items are long overdue and assumed to be lost. Please pay the amount listed below as soon as possible. |
| Standard Overdue Notice | The following items are overdue. Please return them as soon as possible. |
| Standard Ready Hold Notice | The items you requested are now available in the library. Please bring this notice to the library as soon as possible. |

You cannot delete or edit any of the standard notice templates. If you want to edit a standard template, choose Duplicate, and then create a new template based on the existing wording.

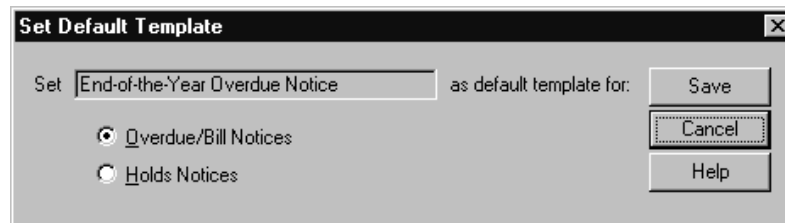
How to change the wording on a notice

- Decide how you want to go about changing the wording on a notice:
 - If you want to change the Default Template assignment, skip to step 3.
 - If you want to change the wording of a listed template, other than the standard templates, highlight the template, and then choose Edit. The Edit Template dialog appears.
 - If you want to create a new template based on the wording of a listed template, such as one of the standard templates, highlight the template, and then choose Duplicate. The Add Template dialog appears.

- If you want to create a new template with completely new wording, choose New. The Add Template dialog appears.



2. After you type in the new wording and name the template, choose Save.
3. From the list under Template, highlight the name of the template that you want to assign as the default, and then choose Set Default. The Set Default Template dialog appears:



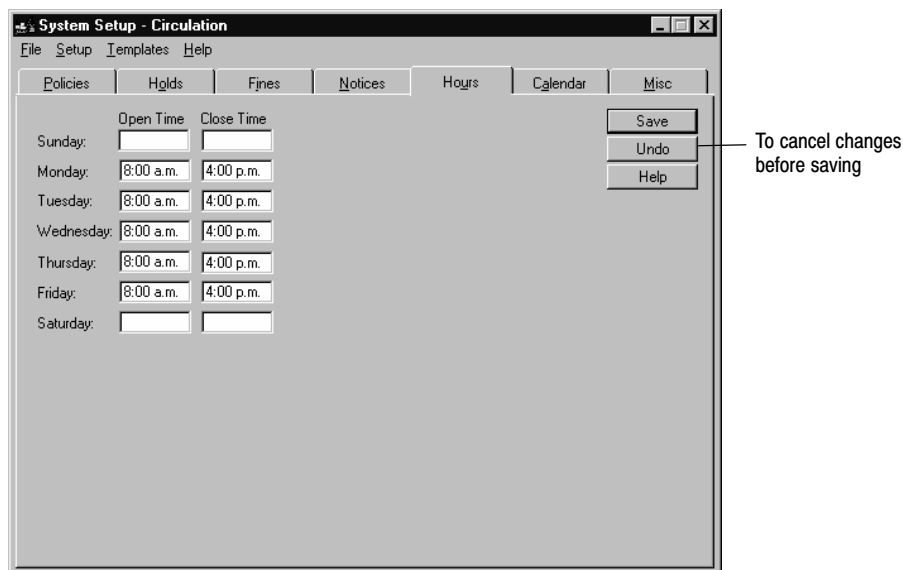
4. In the Set Default Template dialog, select the notice you want to assign your template to, and then choose Save.

Setting your library's hours

Setting up your library hours in System Setup is important because Circulation Desk uses this information when calculating due dates and fines for hourly checkouts. Be sure to define opening and closing times for each day of the week you are open, even if you are only open once a month on that day.

To set up the opening and closing times for your library, follow these steps:

1. From Circulation in System Setup, select the Hours tab.



2. In the Sunday through Saturday text boxes, enter the default opening and closing times for your library. Remember to add **am** or **pm**. When you're finished, click Save.

Setting up your library's current calendar

You record your library's closed days in the calendar in System Setup. Circulation Desk uses this calendar to determine due dates, calculate overdues, and monitor grace periods.

Important: Any changes you make to your calendar take effect when you reopen Circulation Desk. These changes, however, are *not* applied retroactively to checkout due dates. For example, if you close a day that lies less than two weeks in the future—assuming your maximum circulation period is two weeks—copies already checked out that come due on that day are still due on that day. If a copy is checked in late because the library was closed on the due date, a fine is still calculated and assessed based on the settings in the Fines tab.

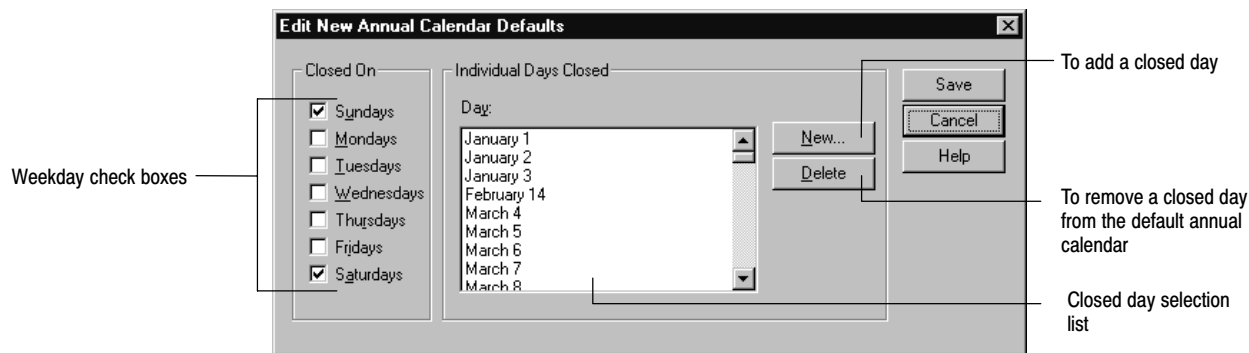
Make sure that you have hours of operation defined in the Hours tab for each day you are open. Circulation Desk treats days without defined hours of operation as if they were closed.

System Setup uses the default annual calendar as a template when you create a calendar for the new year. You are not required to change any of the settings in the default annual calendar.

Circulation Desk also uses the default annual calendar to automatically create a new calendar year for you when the due date for a checkout extends into the coming year for which no calendar has been created.

To set up or change your current calendar, follow these steps:

1. From the Circulation tabs, select the Calendar tab. If a calendar exists for the current year, the Calendar tab appears. Skip to step 4. If a message appears informing you that the system was not able to locate the current calendar, you must set up your default annual calendar. In the warning message, choose Yes. The Edit New Annual Calendar Defaults dialog appears:



Note: If you already created a calendar for the current year and then change the default annual calendar, these changes won't take effect until you create a calendar for the next year.

2. Select the weekday check boxes for the days you want to close for the *entire* year. Make sure that you do not leave any days open for which you have not defined Open and Close times in the Hours tab. Circulation Desk treats days without defined hours of operation as if they were closed.

If there are certain dates on which you know the library will always be closed—such as January 1 or December 25—you can mark them as closed on the default calendar by closing the individual day. If you want to close an individual day, choose New. The New Closed Day dialog appears:



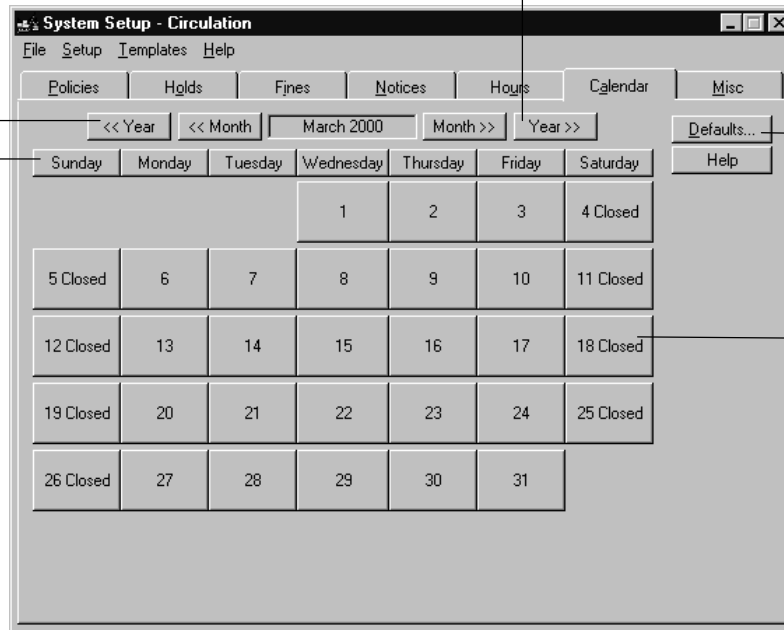
3. From the Closed On drop-down lists, select the month and the day of the month. Choose OK to add that date to the list of closed days and return to the Edit New Annual Calendar Defaults dialog. To add another closed day, click New in the Edit New Annual Calendar Default dialog, and repeat this step.

When you're finished, choose Save on the Edit New Annual Calendar Defaults dialog. The Calendar tab appears:

Use the scrolling buttons to move from month to month or from year to year.

Use the Year forward scroll button to create a calendar for the coming year based on the default annual calendar.

To open or close a day of the week for every week of the year, click on the weekday button. System Setup uses the first day of the month as its reference. For example, if you choose the Tuesday button, and the first Tuesday in the month you're viewing is closed, then all of the Tuesdays for the entire year are opened, regardless of the previous open/closed status.



To edit the default annual calendar, choose Defaults and go back to step 2.

To open or close a single day, click on the date. If the day was marked closed, it will now be cleared, meaning that it's open.

Warning: You cannot undo your mistakes in the Calendar tab. For example, if you open the first Saturday of every month, and then accidentally click the Saturday weekday button, all the Saturdays for the entire year are closed. You must now reopen those first Saturdays individually for each month of the year.

4. Open and close the days in the current month to match your calendar. If you try to open a day for which no library hours are defined, a message appears. Use the scroll buttons to move from month to month or year to year.

If you scroll past December and there is no calendar defined for the coming year, a message appears informing you that the system was not able to locate the current calendar. You have two options:

- If you want to use the current default calendar to set up next year's calendar, choose Yes in the warning message. Next year's calendar is created based on the current default calendar.
- If you want to edit your default calendar, choose No in the warning message, and then choose Defaults on the Calendar tab. The Edit New Annual Calendar Defaults dialog appears. Go back to step 2 to edit your calendar defaults.

When you're finished, go on to the next setup task, "Setting up alert sounds (and more) for your circulation desk."

Setting up alert sounds (and more) for your circulation desk

System Setup lets you set up sounds for certain Circulation Desk events (including block conditions). From the Misc tab, you also set your default circulation type and, if you want, set an inactivity timeout period for Circulation Desk. If necessary, you can also adjust your system date from the Misc tab.

Important: The sounds, today's date, and inactivity timeout options are specific to the current workstation. You must set up these options at each workstation where you will be using Circulation Desk.

To set up these options, select the Misc tab from the Circulation tabs in System Setup. Please note that while the options on the Misc tab are identical on Mac OS and Windows workstations, the way you set up certain options varies:

The sounds you choose will play whenever the associated event occurs.

Select your most common circulation type.

To clear all the Circulation Desk fields automatically after a period of inactivity, select this option.

On Mac OS, to select a sound, click the popup button. To test a sound, click Play.

On Windows, to select a sound, click Edit. From the Windows Sounds Properties dialog, locate the Circulation Desk event you want to change, and then locate and select the sound you want to use.

To include patron information when extracting data, check this box. For more information, see "Extracting Data" on page 585.

When this check box is checked, patrons will be associated to transactions recorded in the statistics records. When this check box is not checked, there will not be a link between statistic records and patrons.

If today's date isn't correct, click Change. On Windows, the Date/Time Properties dialog appears automatically. On Mac OS, a message appears telling you to go to the Date & Time Control Panel. After making your changes, click OK to return to the Misc tab.

Important: Changing the date/time changes the operating system date/time, not just the date/time used by the Follett applications.

When you're finished setting up the rest of the options, choose Save.

Important: Windows workstations need a sound card for you to set up sounds for Circulation Desk. If your workstation doesn't have a sound card, Circulation Desk plays a beep through the computer speaker each time one of the specific events occurs.

Important: Changing the Collect Patron Transaction Histories check box will only affect future statistics records. Statistics currently in the database will remain the same until you perform Remove Patron History in Utilities.

Additional sounds are available on your Follett Software Installation CD. To use them at your workstation, insert the CD into the CD drive. From the CD, locate the EXTRAS\SOUNDS folder, and open the folder that matches your workstation's operating system:

- On Windows, drag the sounds you want from the CD to your FOLLETT\CC40\WMEDIA folder (by default located in C:\PROGRAM FILES). To set up the new sounds, follow the instructions on page 88.
- On Mac OS, locate but don't open your hard drive's System Folder. Drag the sounds you want from the CD to the System Folder and click OK on the message that appears. The next time you start System Setup, the new sounds will be available from the popup buttons (see page 88).

See also: For more information about the Sound Properties, Date/Time Properties dialogs, or Date & Time Control Panel, please refer to your operating system's help or documentation. For more information about block conditions, see "Handling block conditions during a transaction" on page 127.

After preparing for circulation

After completing all of the setup tasks in this chapter, you are ready to add patrons to your database. For instructions, see Chapter 15, "Maintaining individual patron records," and Chapter 17, "Importing patron information."

If you purchased Catalog Plus, you also need to complete Chapter 33, "Setting up your search stations."

Chapter 6 Building your union

A union catalog can mean something very different from one district to the next. While one district might process and distribute all records from a central location, the next may rely on catalogers at each member site. No matter what your situation, this version of Follett's Union Catalog Plus—with or without Follett Data Exchange Server—is the most flexible district solution ever. The instructions in this chapter assume that you have already decided on the type of union catalog your district needs.

Who should read this?

Building a union catalog is a cooperative effort. No matter what type of union catalog you're setting up, you'll need to be familiar with the members in your district. For sites that won't be using Data Exchange (DX, for short), you'll need a general idea of the quality of each member's MARC records so you can import the highest quality records first. Setting up DX members not only requires knowledge of your members' cataloging practices — you'll also need to know their participation preferences. DX members also require some additional, rather technical, setup tasks, which are explained in the *Follett Data Exchange Guide* (fscdx.pdf).

Important: We strongly recommend that you enlist the aid of your technology coordinator or arrange to have Follett Software Company help you set up the Follett Data Exchange Server.

Where do we begin?

To help you build your union catalog, we have included the following checklist to guide you through the process:

Steps for building your union catalog

- 1. Before you begin, make sure you have all the information you'll need:
 - If you'll be doing original cataloging at the union catalog, you'll want a list of the non-Dewey call number prefixes used in your district.
 - If you'll be setting up any non-DX members, make sure you have the current setup information for each, including the barcode symbology they use for library materials and any circulation types or categories they use. If you haven't already, this would also be a good time to request that they export their collections (MARC 21/852 holdings format) and send you the files for import. See page 112 for more information.
 - If you'll be setting up any DX members, make certain each has installed and set up Circulation Plus/Catalog Plus. The Union Catalog Plus, Follett Data Exchange Server, and member applications must all be the same version for a new union/DX installation (currently, v5.0). Determine each member's level of participation (see page 93), and any material types, categories, call number prefixes, or circulation types the member wants to exclude from the union catalog database (see page 94).

Important: It is critical that **all** sites (member and union catalog, DX or not) have a full and short version of their site name and a unique MARC Organization Code.

Steps for building your union catalog

- 2. Enter your union catalog's site and cataloging information through the union catalog's System Setup. For instructions, see page 95.
 - 3. If your union catalog will be using data exchange, the union catalog database and DX member databases must be linked to a Follett Data Exchange Server before you can add the DX members to the union catalog. For more information and instructions, see the *Follett Data Exchange Guide* (fscdx.pdf). After completing all the steps outlined in the checklist, continue with the following steps.
 - 4. Enter the site and cataloging information for your non-DX members through the union catalog's System Setup. For instructions, see page 101.
 - 5. Configure your DX members through the union catalog's System Setup. Instructions begin on page 101, with DX member-specific information starting on page 106. Also see the *Follett Data Exchange Guide* (fscdx.pdf).
 - 6. To finish building your union catalog, see "What's next?" on page 112.
-

What is data exchange?

The Follett Data Exchange Server lets you make the most of the union catalog's best cataloging practices. Data Exchange (DX for short) is a behind-the-scenes way to transfer collection data between members and the union catalog. Follett Data Exchange Server's setup options let you customize the flow of data.

By setting participation levels and filtering rules, the union catalog can control how and what data is exchanged with its member sites. Once these rules are set, the Follett Data Exchange Server updates district and member data automatically. Selected Database Sources in Cataloging lets DX members search the union catalog database for MARC records, even if they choose not to share their data with the union catalog.

Rather than the union catalog and all members sharing the same static records, Follett Data Exchange Server lets each member send and receive MARC records appropriate to its own quality needs automatically. For example, a member site with an expert cataloger would not have to receive records from other members, or even the union catalog. With seven levels of participation, union catalogs and members can share at the level appropriate for each site.

Behind-the-scenes rules for merge, match, survival, and bounce-back determine which record will be added to a database. Typically, the record with the most complete information is the one that is saved to the union catalog database and then transmitted to members. For example, a brief MARC record is sent to the union catalog, where it encounters a better record. A merged record is created and that better record of "merged" data is bounced back to the sending member site.

Note: Data exchange transfers bibliographic and copy records. However, within these records certain *tags* are not exchanged: 59x (local notes) tags, 9xx tags (except for the 940 tags), and any WebPath Express bibliographic tags you may have in your collection.

Participation levels

Follett Data Exchange Server's seven levels of participation let you explicitly define the relationship between the union catalog and each member. The participation levels determine how information moves between the union catalog and the member. Before setting this option, you need to know how much partnering of records each member wants to have. Each level is described below.

Level 1 - In this scenario, no data is shared between the union catalog and the member. This option is intended for sites that want to manually maintain a central repository of MARC data, but do not want to have that data automatically transferred between a site and the union catalog. This option requires that data either be manually entered or imported at the union catalog. It is not recommended that data for a specific member be exported from the union catalog and imported into the member since the member will usually have the most recent record. Importing data does not ensure that the most robust MARC record survives.

Level 2 - In this scenario, the member sends all of its data to the union catalog, but the union catalog sends no data to this member. This option ensures that this member's data is never replaced by MARC or copy updates or additions at the union catalog. Level 2 might be applied across an entire union catalog in those situations where the union catalog database acts solely as a resource for union catalog OPAC search stations. The downside to this option is that more robust MARC records at the union catalog never find their way down to the member. For example, if your district were sharing electronic hyperlinks (856 tags) or curriculum objectives, these tags would not be transferred to the members.

Level 3 - In this scenario, the member sends no data to the union catalog, but the union catalog sends all of its data to this member. This option would be ideal for districts that do all cataloging and distribution at the union catalog. This environment is commonly referred to as central processing. Items are cataloged and barcoded at the district level and distributed to member sites.

Level 4 - In this scenario, the member sends added MARC records and all copies to the union catalog. The union catalog, in turn, sends all data to this member. The union catalog is protected from having MARC data replaced by updated records from this member. This option is for member sites who have bad data or who rely on a part-time or volunteer cataloger. It would be appropriate for sites that do little or no original cataloging but are in charge of managing their own acquisitions. Level 4 allows the site to create a MARC record and, if a better record reaches the union catalog later, that record will be sent back down to the member due to its holdings.

Level 5 - In this scenario, the member sends all data to the union catalog. The union catalog sends added MARC and copy records to this member. This member is protected from having its data replaced with records from the union catalog. It accepts no changes from the district cataloger. This option could be used in environments where very little original cataloging takes place at the union catalog, but the member and the union catalog share acquisition responsibilities. In this situation, the member would be responsible for original cataloging (if any) and would be charged with managing its own acquisitions.

This option protects the member from any MARC changes from the union

catalog, but it also prevents “better” records from another level 5 member replacing its own records. For example, if your district were sharing electronic hyperlinks (856 tags) or curriculum objectives, these tags would not be transferred to the Level 5 members.

Level 6 - In this scenario, the member sends all data to the union catalog. The union catalog only sends changes made by the district cataloger. This could be a member with an expert cataloger who wants to send records to the union catalog where there is another expert cataloger for the district. This member does not want to get records from other member sites, however. If a member participates at Level 6, it receives all of the benefits of Level 7, but does not receive MARC changes that originate at any other point in the district other than at the union catalog database. This option might either be appropriate in a district where most cataloging is done at the union catalog or at a Level 6 member.

Level 7 - In this scenario, all data is shared equally between the union catalog and this member. This option is recommended for sites that share cataloging and acquisition responsibilities with the union cataloger. This option is ideal for districts that want to share all of their MARC information, including data such as electronic hyperlinks and curriculum objectives.

Levels 3, 4, 6, and 7 assume that there is a professional cataloger at the union catalog who performs some central processing. Certain types of MARC changes should be performed at the union catalog if any members participate at these levels. If, say, an 856 tag changed on a record already in the union catalog database and a Level 7 member removed that tag and sent the new record to the union catalog, because the tag wasn't removed at the union catalog, it would be put back when the record merged with the existing data. Basically, members participating at these levels agree to accept changes from the union catalog.

Note: Regardless of the participation level chosen, every DX member running Catalog Plus on Windows has access to the union catalog database through the Selected Database Sources (on-demand data sharing) feature (see page 247). This feature is *not* available on Mac OS.

Filtering rules

You also have control over which part of each member collection is shared with the union catalog. This is done through filtering rules set for each member site. These filters apply only for member-to-union catalog data and are configured on a member-by-member basis. These filters are MARC-specific: Material Types; and copy-specific: Categories, Circulation Types, and Call Number Prefixes. The copy-specific filters for Categories, Circulation Types, and Call Number Prefixes filter out information a member would not want to share with the union catalog. If you catalog a record or copy at the union catalog, however, no filters are applied; all records will go to the member sites if the participation level allows it.

Sharing MARC records depends on MARC-specific and copy-specific filters. A MARC record is sent to the union catalog if it passes the MARC filters and there is at least one qualifying (non-filtered) copy record attached. A record need only fulfill one filter criterion before it is stopped from being transferred to the union

catalog. For example, the MARC-specific filter for Material Types could keep a member's cataloged AV equipment from being transferred to the union catalog.

A copy record is sent if it passes the copy-specific filters and if its associated MARC record passes the MARC-specific filters. Copy records at the union catalog are only sent to the member who owns the copy. A scenario for copy-specific filtering might be a private source of funding cataloged locally as a Category if the private funding specified that the funds were to purchase materials to be used only at the site. By filtering this category, the records for these items could be excluded from the union catalog. Likewise, you may not want items with a circulation type of Temporary to go up to the union catalog.

How are the “best” records created?

Once a record is transferred to the union catalog, some non-configurable filters are used to create the best possible record.

Matching rules determine whether a remote site already contains a record. If no match is found, the record is added to the destination database. If a match is found, the rules are applied and a replacement attempt is made. Further rules determine if replacing the existing record or merging the two records would produce the best results. This helps ensure that the best record is in the database.

Bounce-back rules help the better union catalog record go back to the member. If the incoming record loses, the winning record is sent back to the sending database (if allowed by participation and filter rules). If the incoming record wins, the record is redistributed to other members based on holdings information and participation rules.

Setting up your union

The first step in building your union catalog is entering your union catalog's site and cataloging information in System Setup. To help set up your union catalog quickly and accurately, we recommend that you gather the following information before starting:

- The official name of your union catalog as you would like it to appear on reports and your union catalog's MARC Organization Code.
- A list of the non-Dewey call number prefixes you need when cataloging at the union catalog.

To start System Setup, open the Follett Applications folder on the computer desktop, and double-click the Union System Setup icon. The System Setup window appears (see page 33).

Note: You can also access the Follett Applications menu from the Windows Start | Programs menu or from the Mac OS Apple menu.

Important: The first time you launch System Setup, it creates files that are used by all the other Follett applications. This process may take a few minutes.

Entering union catalog site information



1. To enter your union catalog's site information, from the union catalog's System Setup menu bar, select Setup. If Union is checked, select Site; if it isn't, select Union, and then select Setup | Site.

If you're using a Site Setup password, a password dialog appears. Enter the Site Setup password (by default, **MAKEITSO**) and click OK. The Site tabs appear with the Identification tab open. Only the tabs you need are enabled:

The dialog box contains the following fields and callouts:

- Identification Tab:**
 - Full Union Name: Stratford District Union (Callout: Your union catalog's name)
 - Short Union Name: Stratford
 - USMARC Organization Code: IIMchF-Dev1 (Callout: These three fields are required. If you need to obtain a MARC Organization Code, see page 36 for instructions.)
- Information Tab:**
 - Contact Person: Terrence Fenzel (Callout: The person to whom all union catalog mailings are directed)
 - Address Line 1: 535 Belvedere Rd (Callout: Your union catalog's mailing address. Some field names depend on your address format (e.g., State/Province).)
 - Address Line 2: (Empty)
 - City: McHenry
 - State: IL
 - Zip: 60050
 - Email: tfenzel@myschool.edu
 - Phone: 815-344-8700 (Callout: Voice phone number for your contact person (district librarian, for example))
 - Fax: 815-344-8774
 - Follett Customer #: 12-34567 (Callout: The number assigned to you when you purchased your software)
 - Tax Exempt #: (Empty)
 - netLibrary Account ID: 987654 (Callout: Your union catalog's federal or state tax exemption number)
- Buttons:** Save, Undo, Help (Callout: To cancel changes before saving)
- Additional Callout:** If your union catalog owns netLibrary eBooks, enter the account number to enable previews and checkouts.

Important: For non-US union catalogs, see step 2 before entering your information.

Enter your information: the Full and Short Union Names and MARC Organization Code are required. When you're finished, click Save.

- By default, the Identification tab uses the address format for the United States. To choose a different address format, select the Information tab:

Country where your union catalog is located. This will determine the address format on the Identification tab for the union catalog and all members.

The screenshot shows the 'System Setup - Site - McHenry District Libraries' dialog box with the 'Information' tab selected. The 'Address Format' dropdown menu is set to 'United States'. The 'Classification' dropdown menu is set to 'Dewey'. On the right side, there are three buttons: 'Save', 'Undo', and 'Help'.

To cancel changes before saving

After selecting your address format, click Save.

- For security purposes, Union Catalog Plus lets you change the passwords you use to access the applications. To change the application passwords, select the Passwords tab:

The System Setup Cataloging tabs use the Cataloging password.

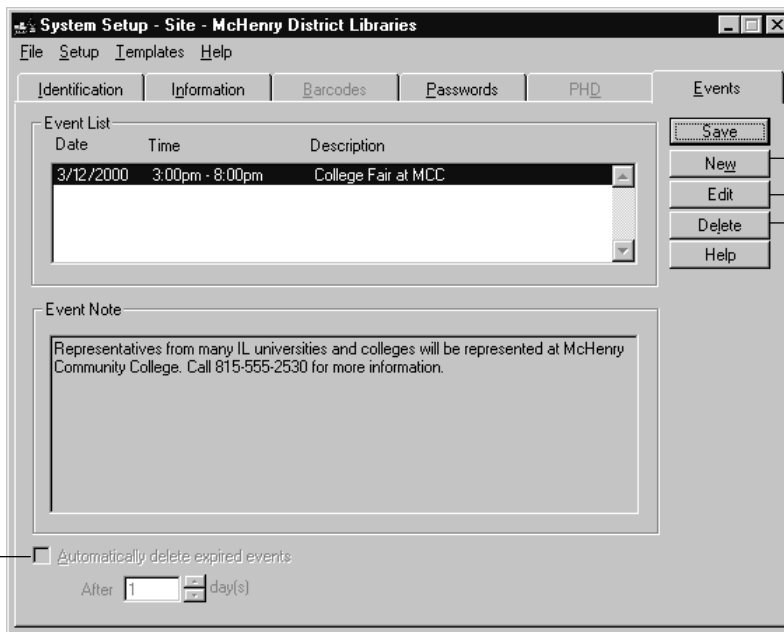
See also: For a list of the default application passwords, see page 41.

The screenshot shows the 'System Setup - Site - McHenry District Libraries' dialog box with the 'Passwords' tab selected. The 'Alliance Plus' field is set to 'Same as Cataloging'. The 'Backup and Restore' field is set to 'Same as Utilities'. The 'Cataloging' field has two password input fields, both containing 'XXXXXXXX'. Below this, there are three rows of password input fields for 'Reports', 'Site Setup', and 'Utilities', each with two fields containing 'XXXXXXXX'. On the right side, there are three buttons: 'Save', 'Undo', and 'Help'.

To cancel changes before saving

You can change any passwords you like. If you don't want to use passwords, you may delete any or all of them. After making your changes, click Save.

- Through the union catalog’s System Setup, you can enter events for patrons to view in the union catalog OPAC (see page 410) or with WebCollection Plus for Union (see page 450). To add or maintain events for the district, select the Events tab:



To add or edit an event, see the instructions on page 44.

To delete an event, select the event and click Delete. At the message, click Yes to proceed.

Events entered at the union catalog cannot be deleted automatically.

The events you enter here are not shared (exchanged) with members. After making your changes, click Save.

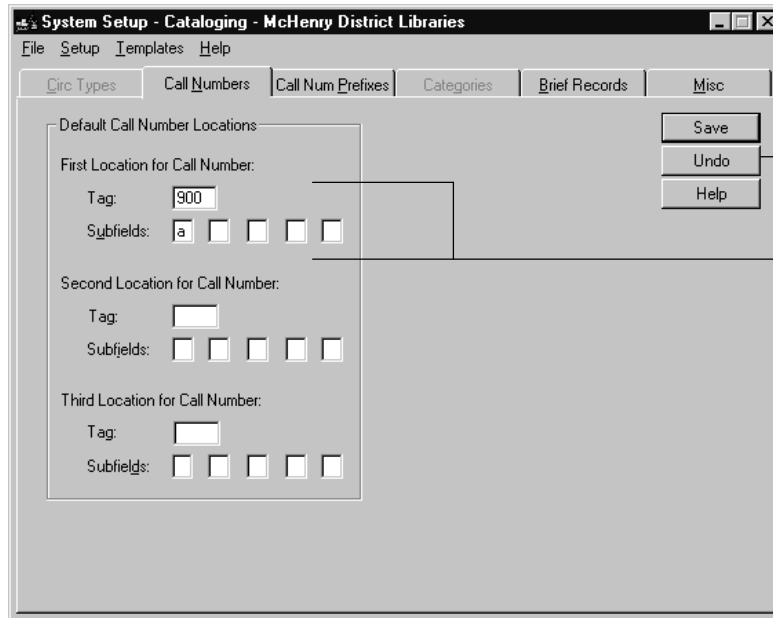
Entering union cataloging information

- To enter your union catalog’s cataloging information, from the union catalog’s System Setup menu bar, select Setup. If Union is checked, select Cataloging; if it isn’t, select Union, and then select Setup | Cataloging.

If you are using the Cataloging password option, a password dialog appears. Enter the Cataloging password (by default **MODTITLE**) and click OK. The



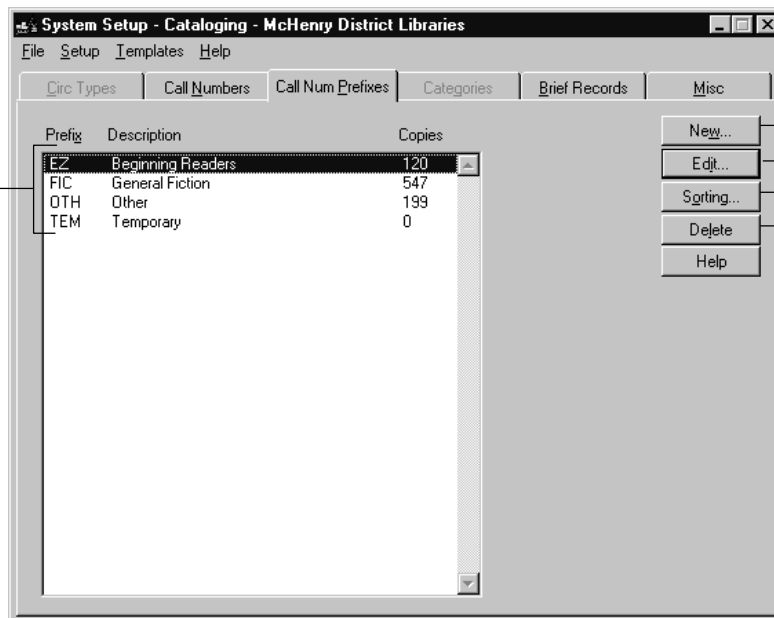
Cataloging tabs appear with the Call Numbers tab open. Only the tabs you need are enabled:



To cancel changes before saving

To save you time when you add a new copy record, Cataloging looks in the locations you define here for a default call number for the copy record. This information is also used by several reports. For more information, see page 47.

- In the Tag and Subfields text boxes, type the most probable locations for the call number in your MARC bibliographic records, and then choose Save.
- To define the call number prefixes for the union catalog, select Call Num Prefixes:



Currently defined call number prefixes

To add or edit a call number prefix, see the instructions on page 50.

By default, numeric call numbers are followed by symbols and alphabetic prefixes. To control how call numbers are sorted, see page 51.

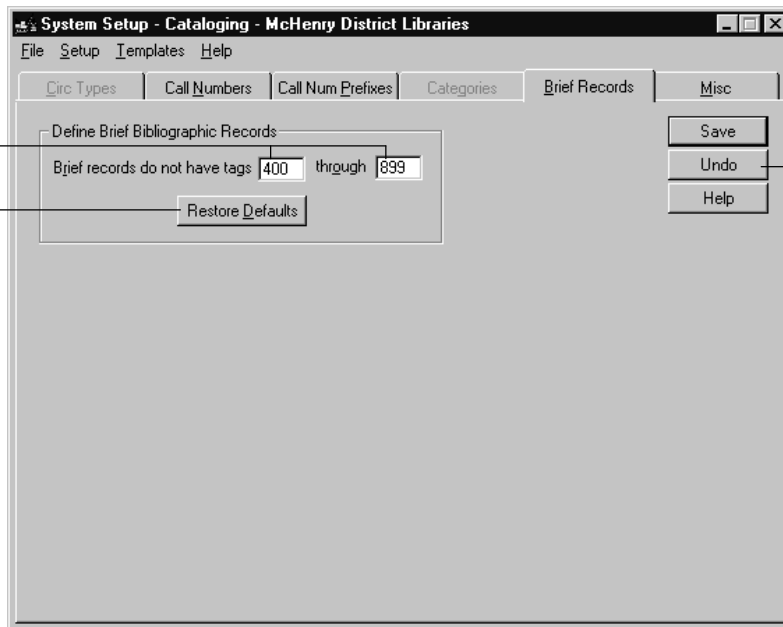
Deletes the selected call number prefix. Prefixes that are included in the Custom sorting list (see page 51) can't be deleted.

A prefix can contain any three characters except for Dewey numbers (000-999), periods, and leading or embedded blank spaces. For additional information on call number prefixes, see page 50.

3. System Setup lets you set starting and ending tag numbers to determine if a record is brief or full from the Brief Records tab:

A brief record has no information in the specified tag range. For more information, see page 54.

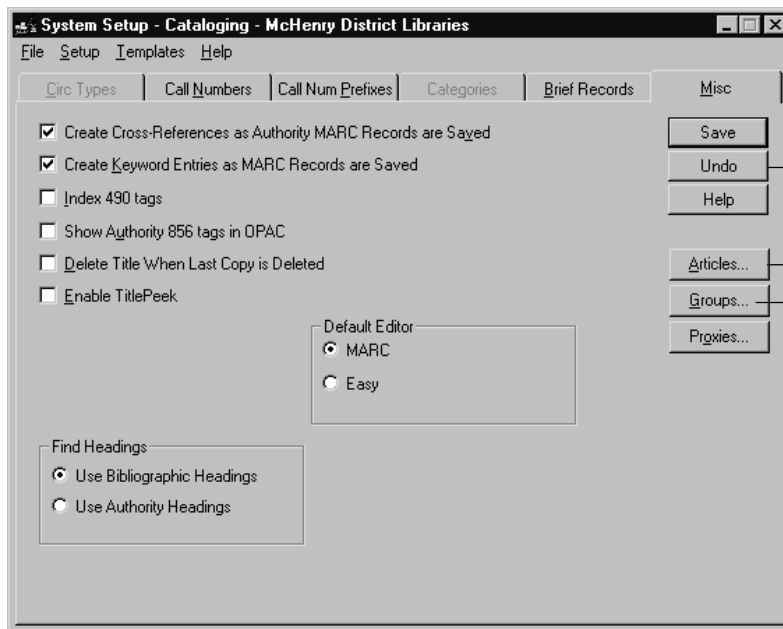
Resets the brief record range to the defaults: 305 through 899



To cancel changes before saving

After making any desired modifications, click Save.

4. A number of settings are controlled from the Misc tab. For information about these options, see the table of miscellaneous Cataloging options on page 56:



To cancel changes before saving

To ignore leading articles in selected languages, see page 57.

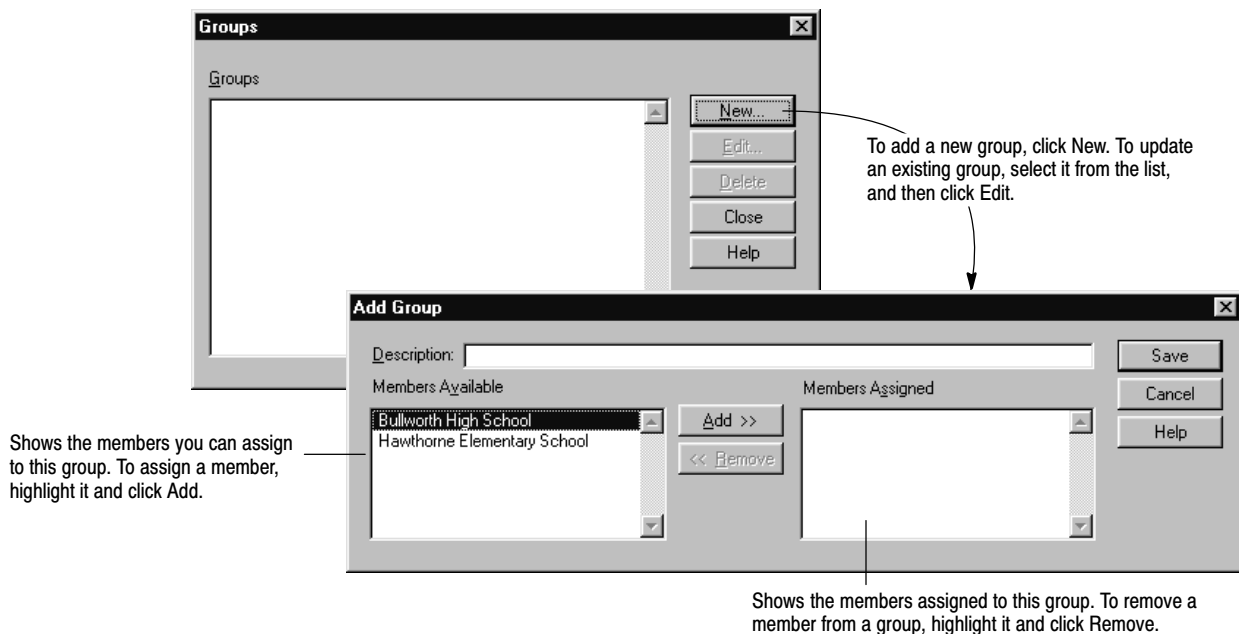
To arrange your member databases in groups

Make certain to save the changes you made to the Misc tab.

From the Misc tab, you can also arrange your member databases into groups. In WebCollection Plus for Union, users can limit their searches to these groups.

Important: You must set up your members before you can create groups. See “Setting up your members” below for more information.

To group your member databases, click the Group button on the Misc tab. From the Groups dialog, you can add, edit, or delete groups.



Each group should have a meaningful description. For example, a group name like “Elementary school libraries” would be more meaningful to a patron than “Bob’s library group.” After assigning (or removing) the appropriate members, click Save to retain your changes.

If you need to delete a group, just select the description from the Groups list and click Delete.

After entering your union catalog information, see the following section, “Setting up your members.”

Setting up your members

Once your union catalog is set up, you’re ready to begin incorporating your members.

Important: If you’re creating a union catalog that will use data exchange, *before* you can add any DX-enabled members, the union catalog database and DX member databases must be linked to a Follett Data Exchange Server. For more information, see the *Follett Data Exchange Guide* (fscdx.pdf). After configuring the Follett Data Exchange Server(s), use the following sections to finish setting up your members.

You add and maintain members through System Setup. To start System Setup, from the computer desktop, open the Follett Applications folder and double-click the Union System Setup icon. The System Setup window appears (see page 33).

Note: You can also access the Follett Applications menu from the Windows Start | Programs menu or from the Mac OS Apple menu.

To add or modify a member, from the System Setup menu bar, select Setup | Member. The Members dialog appears:

This list identifies your defined members and whether they are participating in data exchange (DX) or not (Non-DX).

| Member Name | Type |
|-------------------------------|--------|
| Jackson Elementary Library | DX |
| Messer Junior High Library | Non-DX |
| Star Lake Public Library | Non-DX |
| Sunnydale Junior High Library | DX |

Lets you access a member's site and cataloging setup. Please note that you cannot modify this information for a DX member at the union catalog.

Removes the selected member, their copies, and their setup information. See page 112 for important information.

These options only apply to DX members. For more information, see "Updating DX member information" on page 112.

From this dialog you can add, update, or remove both DX and non-DX members. You'll find the instructions for setting up your non-DX members in the following section, "Defining your non-DX members." Instructions for setting up your DX members begin on page 106.

Important: For information about deleting members, see page 112.

Defining your non-DX members

To add non-DX members to your union catalog, you must enter each member's site and cataloging information in the union catalog's System Setup. To help set up your members quickly and accurately, gather the following information before you start:

- Each member's official name, as it should appear on reports, and a short but recognizable version of their name, which will identify their holdings in the union catalog's Cataloging, OPAC, and WebCollection Plus applications.
- Member contact information.
- Each member's MARC Organization Code.
- The barcode symbology each member uses for library materials.
- A list of each member's circulation types—the codes and descriptions they use to identify their different lending periods (e.g., overnight, one-week, etc.).
- A list of each member's categories—the codes and descriptions they use to group related items in their collections (e.g., new items, reading lists, etc.).

Important: The setup information you enter for the member must match the setup information at the member's site. If there are differences, you may encounter problems when you import the member's data.

Entering member site information

- To add a new non-DX member, from the Members dialog (see page 102), click New. A message appears, asking if this member will participate in automated data exchange. Click No.

Note: To update the setup information for a non-DX member, select the member and click Edit.

If you're using a Site Setup password (see page 97), a password dialog appears. Enter the Site Setup password (by default **MAKEITSO**) and click OK. The Site tabs appear with the Identification tab open. Only the tabs you need are enabled:

These three fields are required. If the member needs to obtain a MARC Organization Code, see page 36 for instructions.

The person to whom all mailings are directed

Voice phone number for your contact person (head librarian, for example)

The member's federal or state tax exemption number

Member's name

To cancel changes before saving

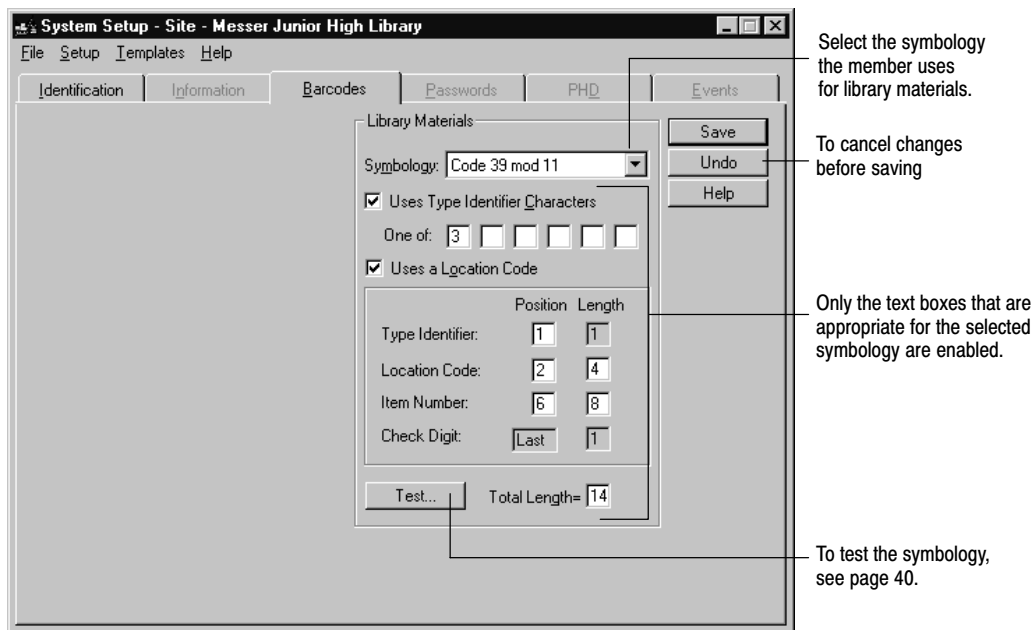
The member's mailing address. The field names use the address format of the union catalog (see page 97).

If the member owns netLibrary eBooks, enter the account number to enable previews and checkouts.

| Field | Value |
|---------------------------|------------------------|
| Full Site Name: | Fenzel Freshman Center |
| Short Site Name: | Fenzel |
| USMARC Organization Code: | 1MchF-Dev6 |
| Contact Person: | Anita Siems |
| Address Line 1: | 247 Section St |
| Address Line 2: | |
| City: | McHenry |
| State: | IL |
| Zip: | 60050 |
| Email: | asiems@myschool.edu |
| Phone: | 815-344-8700 |
| Fax: | 815-344-8774 |
| Follett Customer #: | 12-34567 |
| Tax Exempt #: | |
| netLibrary Account ID: | 987654 |

Enter the member's information: Full and Short Site Names and MARC Organization Code are required. When you're finished, click Save.

- To define the barcode symbology the member uses for their library materials, select the Barcodes tab:



Each member can use a Follett Classic symbology plus one additional 8- to 14-digit symbology for their library materials. If they do use Follett Classic and a non-Follett Classic symbology, you only need to specify the non-Follett Classic symbology. After making and testing your changes, click Save.

See also: For more information, see “Setting up your barcode symbologies” on page 37 and Appendix D, “Barcode symbologies.”

Entering member cataloging information



- To enter the non-DX member's cataloging information, from the System Setup menu bar, select Setup | Cataloging.

Note: If you don't already have the member selected, from the Members dialog (see page 102), select the member and click Edit. When the member is open, select Setup | Cataloging.

If you are using the Cataloging password option, a password dialog appears. Enter the Cataloging password (by default **MODTILE**) and click OK. The Cataloging tabs appear with the Circ Types tab open. Only the tabs you need are enabled:

| Code | Description | Copies |
|------|-----------------------|--------|
| *NC | Non-circulating eBook | 347 |
| NEW | New Books | 84 |
| OVR | Overnight | 133 |
| R | Regular | 9145 |
| RES | Reserve | 211 |
| TEM | Temporary | 62 |

The number of copies attributed to each circulation type

To add or edit circulation types, see page 47.

Deletes the selected circulation type

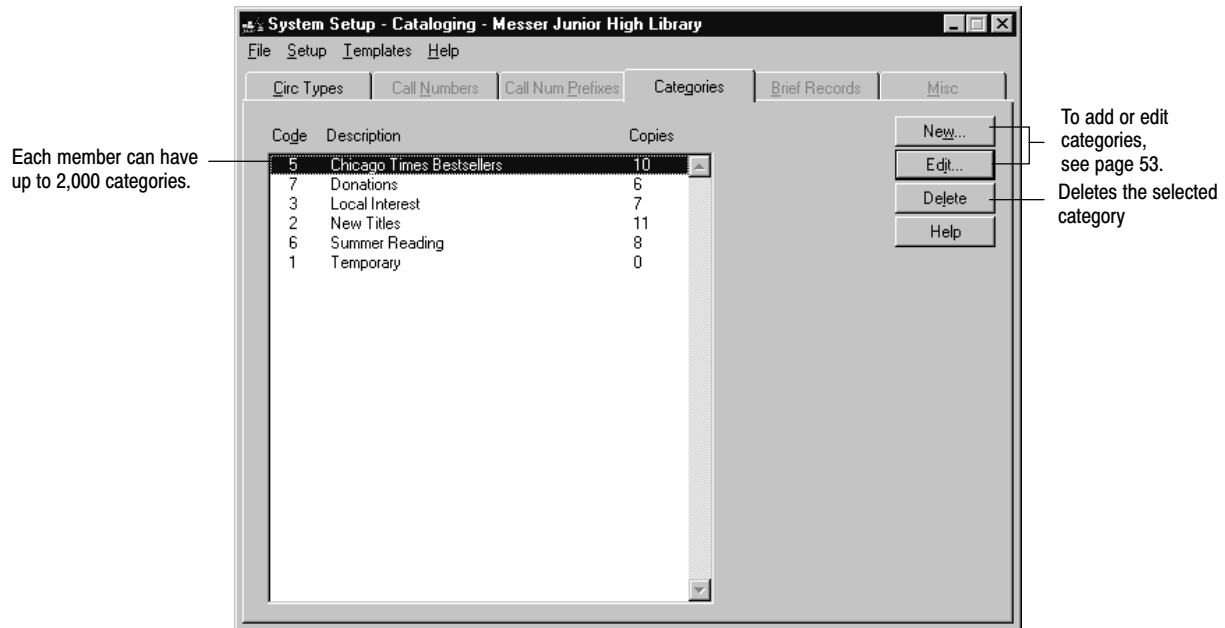
Sets the selected circulation types as the default for all new copies

Default Circulation Type: Regular

Circulation types are descriptions of the loan periods for items in the member's collection. From this tab you can add, edit, or delete circulation types and define one of them as the default. Cataloging automatically assigns the default when new copies are added or imported to the collection.

Note: You cannot delete or edit the Regular (R), Non-circulating eBook (*NC), or Temporary (TEM) circulation types. You cannot assign the Temporary circulation type to a copy through the union catalog applications.

- If the member uses categories to group related items in their collection, select the Categories tab:



From this tab you can add, edit, or delete categories for the member. For more information about categories, see page 52.

Note: You cannot delete or edit the Temporary category. You cannot assign the Temporary category to a copy through the union catalog applications.

If you're building your union catalog, repeat these steps for each non-DX member in your union catalog. If you need to add any DX members, see the following section, "Defining your DX members." After you add all your members to the union catalog, see "What's next?" on page 112.

Defining your DX members

To add DX members to your union catalog, you must connect the Follett Data Exchange Server(s) supporting the union catalog's database and each member's database and set up certain data exchange rules for each member in the union catalog's System Setup.

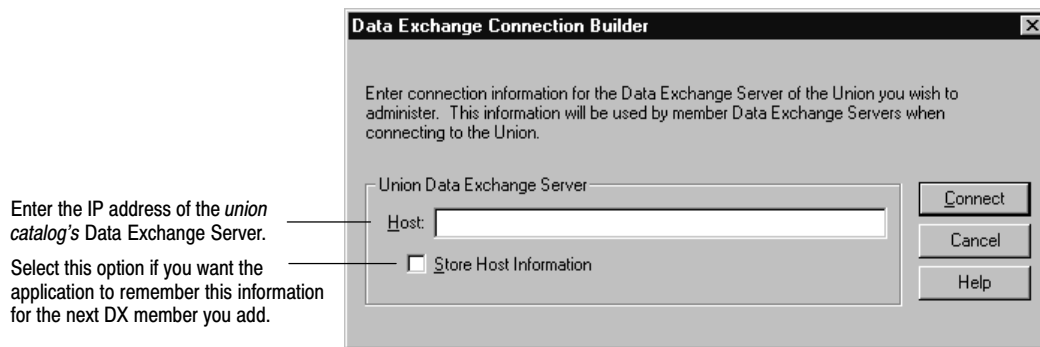
Important: Before you can add any DX-enabled members, the union catalog database and each DX member database must be linked to a Follett Data Exchange Server. For more information, see the *Follett Data Exchange Guide* (fscdx.pdf).

Setting up DX members requires knowledge of your members' cataloging practices and preferences as well as some technical information. To help set up your members quickly and accurately, we recommend that you gather the following information before you start:

- Connection information for the Follett Data Exchange Server(s) supporting the union catalog's database and each member's database, including IP addresses and any user IDs or passwords that may be required.
- Each member's level of participation (see page 93).
- Any material types, categories, call number prefixes, or circulation types the member wants to exclude from the union catalog database (see page 94).
- The location where you want to monitor any errors that might occur.

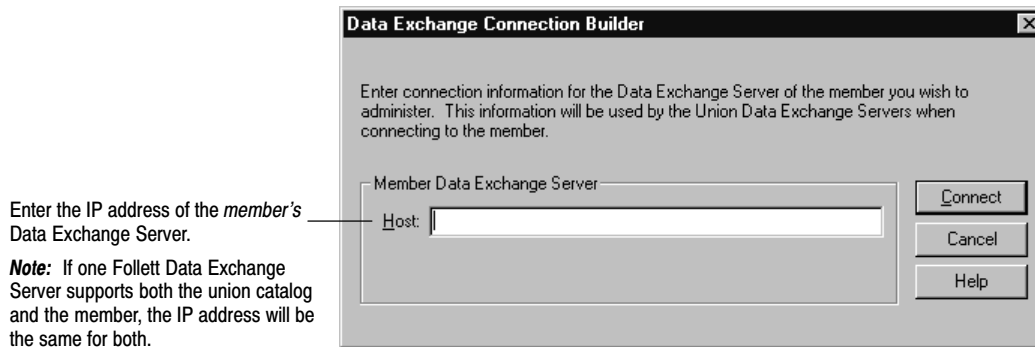
Connecting the Data Exchange Servers

1. To add a new DX member, from the Members dialog (see page 102), click New. A message appears, asking if this member will participate in automated data exchange. Click Yes. Once you confirm that you want to proceed with the connection, the first Data Exchange Connection Builder dialog for the union catalog appears:



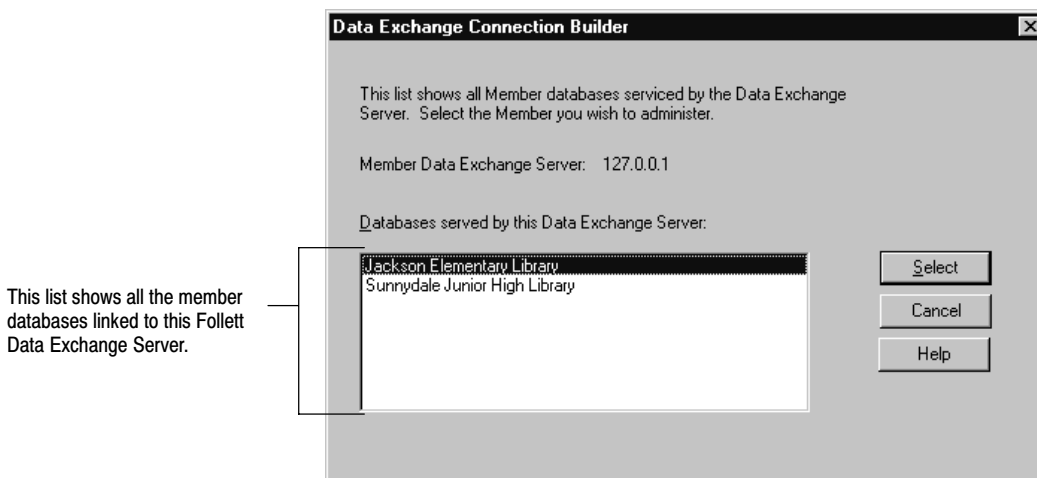
Enter the IP address of the union catalog's Data Exchange Server, and click Connect.

2. The Data Exchange Connection Builder dialog for the member appears:



Enter the IP address of the member's Data Exchange Server, and click Connect.

3. If more than one member database is supported by the Data Exchange Server you specified in step 2, a list of the supported member databases appears:



Choose the member you want to add to the union catalog and click Select.

The Data Exchange Properties dialog for the selected member appears. To define how this member participates in the union catalog, see the following section, "Setting the data exchange rules."

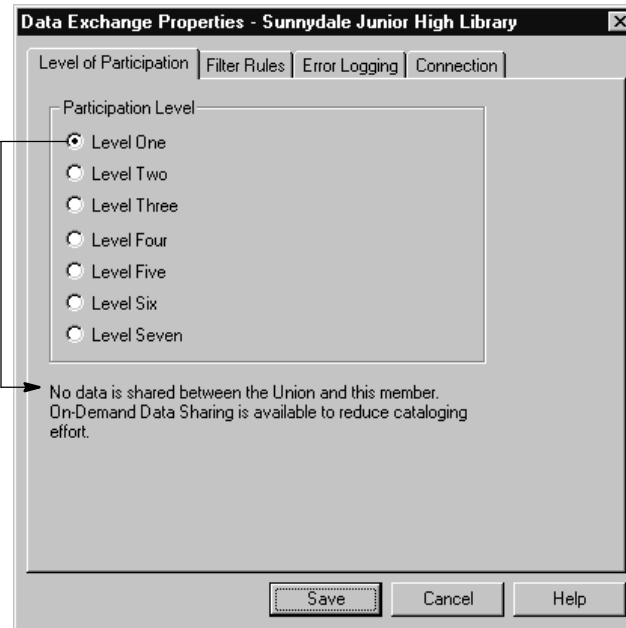
Setting the data exchange rules

From the member's Data Exchange Properties dialog, you specify exactly how the member participates in the union catalog.

Important: To avoid unnecessary network traffic, we recommend that you click Save only after all of your setup options have been selected.

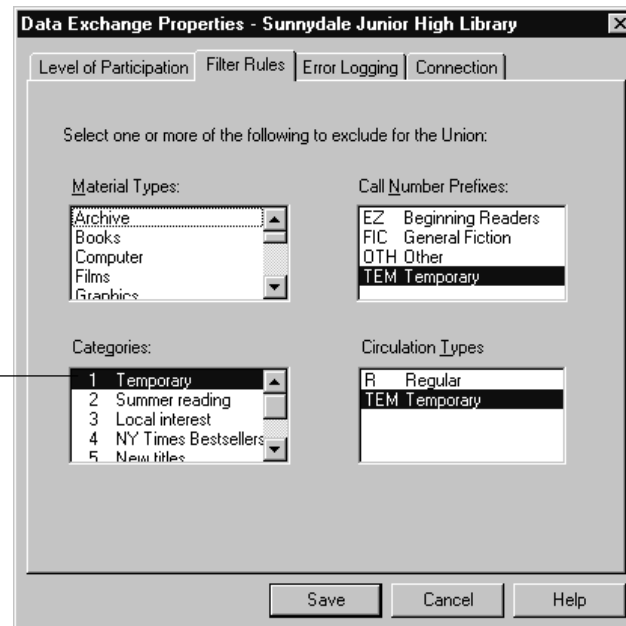
1. To define the relationship between the member and the union catalog, select one of the options on the Level of Participation tab. This selection determines what information moves between the member and union catalog databases:

When you select an option, a brief explanation appears on the dialog. For a complete explanation of the levels of participation, see page 93.



2. If there are any material types, categories, call number prefixes, or circulation types the member wants to exclude from the union catalog database, select them from the Filter Rules tab:

Highlighted items will not be sent to the union catalog database. If necessary, you can select multiple items from each list.



Note: Since filter rules prevent records from being sent to the union catalog, reports run at the union catalog may not exactly reflect the member's collection.

3. From the Error Logging tab, you specify the types of errors that should be logged and where to log them. Where you choose to log the errors depends on the availability and location of your district's technical personnel:

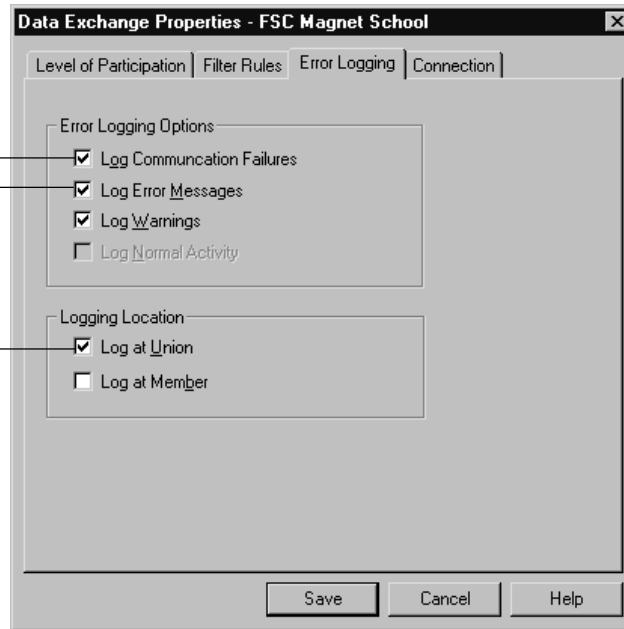
If communications fail, any pending transactions will simply wait until communications resume.

Error messages usually indicate a transaction that couldn't be completed (e.g., the record was in use by the partnering database).

Data Exchange will automatically attempt to resend these transactions in the next batch of updates.

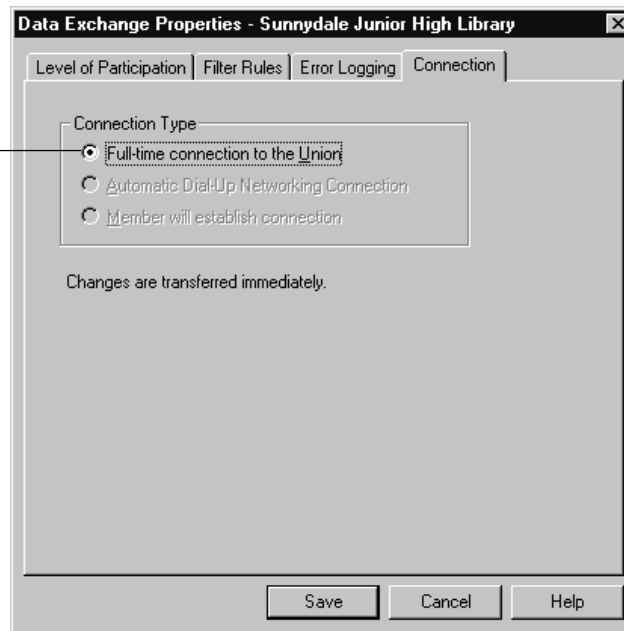
Errors are logged at the specified Follett Data Exchange Server in the Windows NT/2000 Event Viewer's Application Log (see the *Follett Data Exchange Guide* (fscdx.pdf)).

Note: If one Follett Data Exchange Server supports both the union catalog and the member, select only one location.



- From the Connection tab, you specify the member's connection type:

Currently, a full-time connection to the union catalog (i.e., a LAN or a WAN) is the only supported connection type.



- To save your settings, click Save. A message appears, asking if you want to reload the data from the member. If you've just added the member, click Yes.

Note: If you're editing a member's connection, we recommend reloading the data if you changed the participation level or filters.

Once the DX member's information has loaded, you can view (but not edit) their site and cataloging information. From the Members dialog (see page 102), select the DX member, and click View. Any changes the member makes to this information will be reflected at the union catalog. For information on the site and cataloging information, see page 103.

To obtain a brief summary of the DX information, generate a System Information Report at the union. For the union catalog, it lists the number of DX records in the transfer queue, the database ID, the retry time, and the IP address of the union catalog's Data Exchange Server. In the Member Information section are the full site name, MOC, member ID, the member's Data Exchange Server IP address, participation levels, and filters of each DX member. The information for each non-DX member is limited to the full site name, MOC, and member ID. For more information about this report, see page 581.

If you're building your union catalog, repeat these steps (starting with "Connecting the Data Exchange servers" on page 107) for each DX member in your union catalog. Once all your members have been added to the union catalog, see "What's next?" on page 112.

Updating DX member information

At some point, you may need or want to update a DX member's information:

- To change a member's participation level or filtering rules, from the Members dialog (see page 102), select the member and click Connect. The member's Data Exchange Properties dialog appears. See "Setting the Data Exchange rules," starting on page 108.
- If a DX member needed to restore their database from a backup, you'll want to reload the member's data so that the union catalog database remains accurate. To reload the member's data, from the Members dialog (see page 102), select the member and click Reload.

When you reload a member, the member's holdings are deleted from the union catalog database and then reloaded using their current participation level and filters.

Important: Reloading a member's data, either by selecting Reload or after making changes to their connection information, happens automatically, but the process may take several hours to complete.

Deleting a member

You can remove a member from the union catalog database through System Setup. However, while deleting a member will remove the member's holdings, it won't affect the title record. After deleting a member, you may find titles in the union catalog database without any copies. To delete these records, run the Global Delete Titles Without Copies feature in Cataloging (see page 335), or, before you delete the member, export their holdings (see page 317) and select the Delete Titles/Copies After Export option. Only titles that aren't held by another member are deleted.

To delete a member, from the Members dialog (see page 102), select the member and click Delete. A message asking you to confirm your choice appears. To proceed, click Yes.

Warning: Deleting a member removes all of that member's holdings and their setup information from the union catalog database. This process may take a long time. Once confirmed, the process cannot be stopped.

Important: To completely remove a DX member from the union catalog, *after* you delete them in System Setup, the link between their database and their Follett Data Exchange Server must also be deleted. For instructions, see the *Follett Data Exchange Guide* (fscdx.pdf).

What's next?

Now that you've finished setting up your union catalog and all your members, there are still a few tasks to complete:

- Import the records from your non-DX sites. To ensure that your union catalog contains the best MARC records possible, you'll need to import all of your

non-DX members' full records before importing any brief records. You also need a general idea of the quality of each member's MARC records and attempt to import the highest quality records first:

1. Have your non-DX members export all their full records and then export all their brief records. Make certain they include copies with both and indicate which export file is which.
 2. Once you have the records from all your members and have decided which files to import first, you can import them into your union catalog database through Cataloging. For instructions, see page 295. Make certain to select the options to skip existing MARC records and barcodes, unless you want the imported records to overwrite records in the union catalog database. If you're not certain that your non-DX members set up a MARC Organization Code before exporting, choose the option to "Assign copies to member," and then click Select member to choose the appropriate member.
- If you have search stations for the union catalog OPAC, there are many features you can customize. For details, see Chapter 33, "Setting up your search stations."
 - Prior to v4.x of the Follett applications, vendors were identified by a code. As of v4.x, each vendor can be identified by a 30-character description instead. If you want to replace vendor codes with descriptions, use Cataloging's Global Update Copy. For instructions, see page 326.

Considerations for non-DX members and unions

If your union catalog isn't using data exchange for some or all of your members, you'll periodically need to update their holdings if you want to maintain an accurate union catalog. Either of the following options requires some extra effort and cooperation on the part of both the union catalog and the non-DX members:

- Have your non-DX members export their records (with copies) by Title Date Added/Updated on a regular basis and send you the file to import. However, importing this file won't reflect any copies that have been removed from the member's collection. Ask your non-DX members to track and report any copies they delete. Cataloging does generate an exception report with a barcode whenever a copy is deleted; you could suggest that your members save these reports and send them to you with the import file. You could then delete these holdings from the union catalog database.
- Have your non-DX members periodically export all their records (with copies) and send you the file. You could then export all their holdings, selecting the Delete Titles/Copies After Export option (see page 317), and repeat the build process (see the bullets on page 112). If you choose this option, remember that you want to import the highest quality records first.

Notes

Chapter 7 Circulation Desk basics

The basic features of Circulation Desk discussed in this chapter include the following: starting Circulation Desk; limiting access for Circulation Desk workstations; configuring your Receipt Printer (Transaction Tracker); displaying patron pictures; basic Circulation Desk transactions—typing or scanning barcodes, selecting patrons or copies with the Find Patron and Find Title buttons; handling block conditions; viewing and printing patron information; viewing the status of a copy; and designating items as at the bindery or on inter-library loan.

What is Circulation Desk?

The Circulation Desk is a software equivalent of your library or media center circulation desk. From the Circulation Desk application, you perform all the same functions by computer as you would manually from your physical circulation desk. Checking out copies, renewing, checking in, placing copies on hold or reserve, managing patrons, and assessing fines are all done from the Circulation Desk windows.

Note: Before you begin using Circulation Desk, you must complete all of the tasks in Chapter 2, “Setting up your site,” Chapter 3, “Preparing to catalog your collection,” and Chapter 5, “Preparing to circulate your collection.” These chapters contain instructions for setting up your site information, patron types, and circulation types and policies. You must also create or import all of your patron records and MARC bibliographic records and copies. See the Patrons and Cataloging units for more information.

Starting Circulation Desk

To start Circulation Desk, from the computer desktop, open the Follett Applications folder and double-click the Circulation Desk icon. If you defined a password for Circulation Desk in System Setup, a password dialog appears. The default password for Circulation Desk is CHECKITOUT. Type the password in the text box and choose OK.

Note: You can also access the Follett Applications menu from the Windows Start | Programs menu or from the Mac OS Apple menu.

If this is the first time you’ve started Circulation Desk on the current date, a message appears asking you to confirm the system date and time. If you’re running Circulation Desk on:

- **Windows:** To accept the date and time stated in the message, click No. To change the system date or time, click Yes and the Windows Date/Time Properties dialog appears. After you make your changes, the date/time confirmation message displays the new settings. You can change the system date/time again, if necessary. Otherwise, choose No to continue.
- **Mac OS:** To accept the date and time stated in the message, click OK. To change the date or time, from the Mac OS Apple menu, select Control Panels | Date & Time. After making your changes, click OK to close the message.

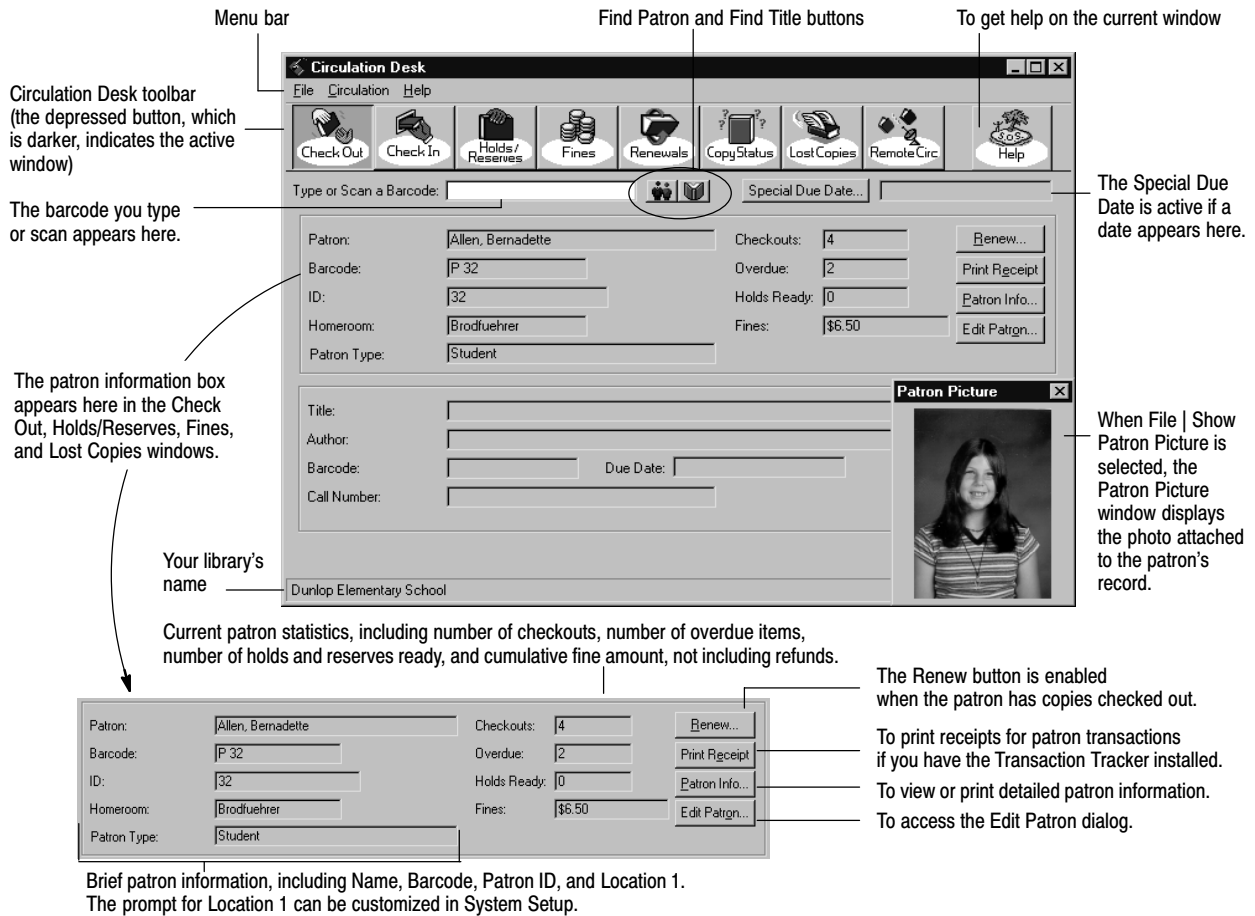
Important: Changing the date/time changes the operating system date/time, not just the date/time used by Circulation Desk.

When you start Circulation Desk for the first time each day, Circulation Desk does a few housekeeping tasks. If there are any events in the system and you specified automatic deletion for expired events (see page 43), the system checks the date of all events. Any deleted events are indicated on the Daily Events Processing progress dialog.

If there are any holds or reserves in the system, the Daily Holds Processing progress dialog appears after Circulation Desk processes the events. If Circulation Desk takes any action on a hold, such as readying or deleting a hold, this information is sent to the Daily Holds Processing exception report. If the pre-reserve processing date for a reserve has arrived, information about the items you need to retrieve is included in the Daily Holds Processing exception report. For more information about the Daily Holds Processing exception report, see page 171.

After you respond to all the startup messages, Circulation Desk opens at the Check Out window. The following shows the Check Out window after a

successful checkout and describes the basic elements of many of the Circulation Desk windows:



From the menu bar, you can access the following submenus and help:

- **File**—Contains the commands for setting up receipt printing, showing or hiding patron pictures, and limiting or restoring access to Circulation Desk. Use the Exit/Quit command to close Circulation Desk. On Mac OS, it also contains a Page Setup command.
- **Circulation**—Use these commands to switch between the Circulation Desk windows, find a patron or title, add or edit a patron, preview due dates, or set a special due date.
- **Help**—Contains the commands used to access the help topic, menus, and glossary. From the About dialog you can see product information, the current number of patrons, titles, and copies in the system, and run the System Circulation Statistics and System Information Reports (see Chapter 39, “System reports”).

To switch between the Circulation Desk windows, select the toolbar button that corresponds to the activity you want to perform, or select it from the Circulation

menu on the menu bar. You can also switch between windows by using the key combinations on the Circulation menu. When you switch windows, Circulation Desk retains the current patron. Because it does so, if you discover during a renewal that the patron owes a fine, you can switch to the Fines window and record a payment without scanning or entering the patron barcode again. Pressing **ESC** clears the current patron.

To switch between circulation functions without using a mouse or keyboard, you can use the laminated Circulation Desk Command Sheet. Scan the barcode of the function you would like to perform and then continue with the operation.

Important: Scanning command barcodes works only when you are in the Check Out, Check In, Holds/Reserves, Fines, Renewals, Lost Copies, or Copy Status windows.

Circulation Desk security

Circulation Desk provides several ways of ensuring security:

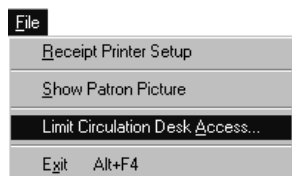
- There are three passwords that you define in System Setup for protecting Circulation Desk: a password for starting Circulation Desk, a password for overriding block conditions, and a password for changing the Circulation setup options (see page 40).
- Pressing the **ESC** key clears all patron and title information from any Circulation Desk window. You can also set up an inactivity time-out option in System Setup to automatically clear all patron and title information from a Circulation Desk window after a specified period of time (see page 88). You can use both of these features to protect patron information.
- If you want to limit the access that student helpers or aides have to your system, you can configure the individual Circulation Desk workstations for limited operation. You can limit access to Check Out, Check In, or both. You can also limit the ability to search for a patron or title. For more information, see the next section, "Limiting and restoring access to Circulation Desk."

Limiting and restoring access to Circulation Desk

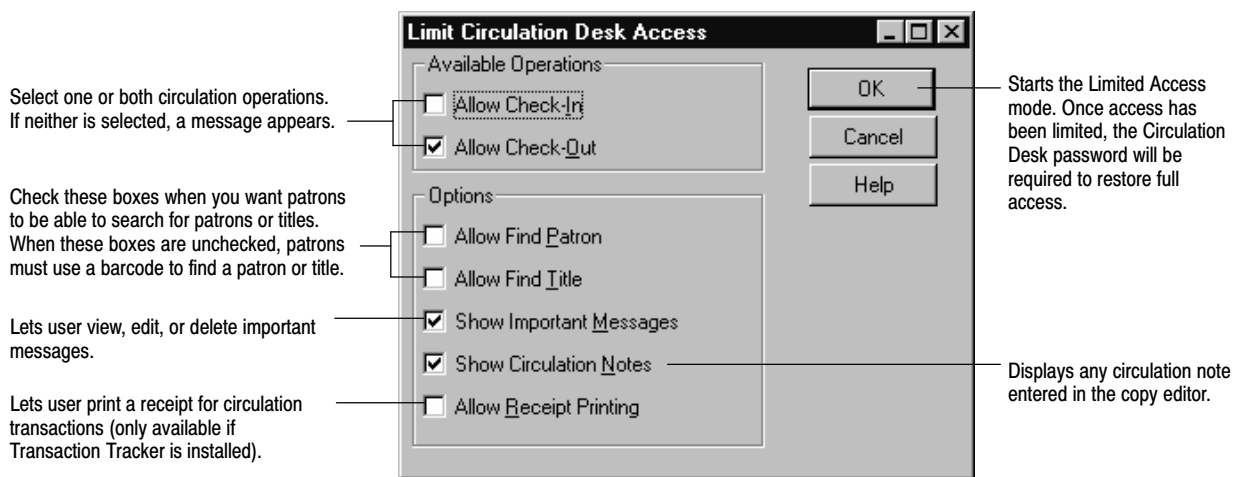
When you want to limit the access that your student helpers or aides have in Circulation Desk, you can configure the individual workstations they use by doing the following:

1. From the File menu, select File | Limit Circulation Desk Access. To set up limited access, you must define a password for Circulation Desk in System Setup. Type the password in the text box and choose OK.

Important: You cannot continue with this feature until you set up a Circulation Desk password in System Setup.



- Once you enter the password, the Limit Circulation Desk Access dialog appears:



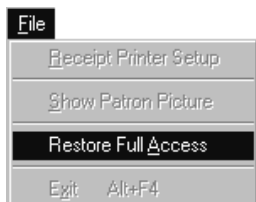
Note: Since the Limited Access options are applied to the individual workstations, you must set up each workstation separately.

Limiting access to Circulation Desk affects certain features:

- **Special Due Date**—If you wish to use a Special Due Date for your check out transactions, the date must be set before entering Limited Access mode. The Special Due Date button is disabled in Limited Access mode.
- **Renewals**—When you enter the Limited Access mode, the Renewals button is disabled. However, you can renew items by simply checking them out again.
- **Record In-Library Usage**—During checkin, if you want to record the in-house usage of books not checked out, make sure that Record In-Library Usage is selected on the Check In window before you enter the Limited Access mode. For more information, see “Reshelving items” on page 152.
- **Block Conditions**—To stop workstation users from clearing all block conditions, even in Limited Access mode, you must set up the Circulation Desk Override password in System Setup (see page 40).
- **Add/Edit Patron**—The Add and Edit Patron functions are disabled while in Limited Access Mode.
- **Patron Pictures**—To show or hide patron pictures, the File menu choice must be made before entering Limited Access mode.
- **Patron Information**—Patron information such as address, fine history, and holds, is never available from the Limited Access mode.

When you want to restore the workstation to full operation, do the following:

- From the File menu, select File | Restore Full Access. In the password dialog, type the password you defined for Circulation Desk in System Setup and then choose OK.



Important: You cannot continue with this process until the correct password is entered.

- 2. Once you enter the password, full access to Circulation Desk is restored.

Receipt Printer (Transaction Tracker) setup and printing

If your library prints receipts for patrons, you can customize the information printed on the receipts. These options are only available if you have purchased and installed the Transaction Tracker for Circulation Plus. You also need to install a printer driver. For Mac OS workstations, there isn't a driver to install; however, the Transaction Tracker must be connected directly to the computer.

Note: Since the Transaction Tracker setup options are applied to the individual workstations, you must set up each workstation separately.

See also: For more information about how to install the Receipt Printer (Transaction Tracker) software and driver, see the *Installation Guide*.

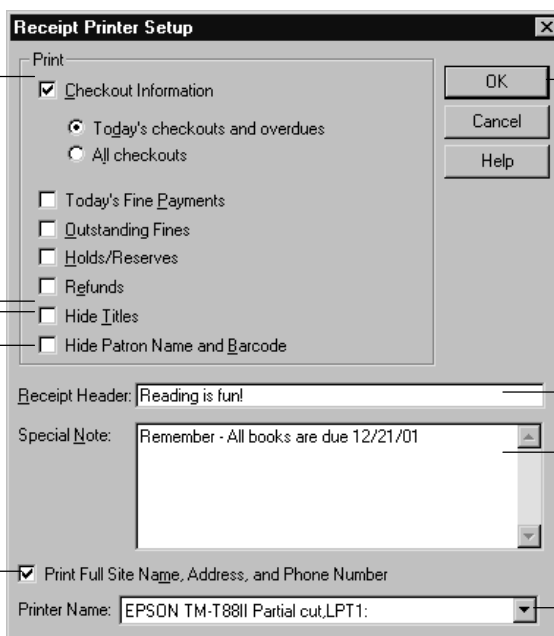
From the Circulation Desk File menu, choose Receipt Printer Setup.



Select the items you wish to appear on the printed receipt.

When these items are selected, they will *not* be printed on the receipt.

When this option is selected, the site information prints on the receipt.



Saves the Transaction Tracker settings

Prints at the top of each receipt

Prints at the bottom of each receipt

Select the printer that has been set up to print receipts. On Mac OS, select the port to which the printer is attached.

Receipts can be printed from several areas of the Circulation Desk, including Check Out, Holds/Reserves, Fines, and Lost Copies. Each receipt will be printed based on the setup defined. The following graphic is an example of a receipt:

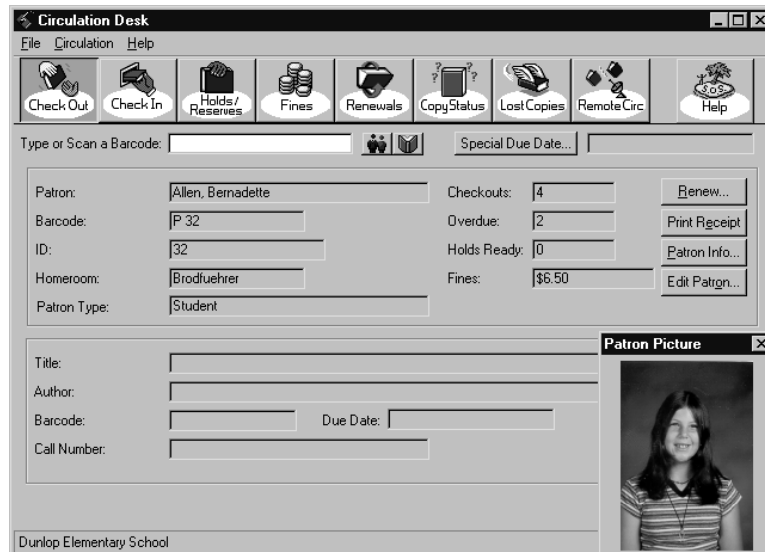
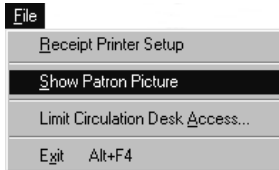
| |
|--|
| <p>Follett High School 55 North Street McHenry, Illinois 99999</p> <p>03/29/2002 @ 12:01pm</p> <p>Reading is Fun!</p> <p>Adams, Michael P 2135430</p> <p>Today's Check Outs</p> <hr/> <p>Tom Sawyer Barcode: T 100029 Due Date: 04/12/2002</p> <p>Overdue</p> <hr/> <p>Huckleberry Finn Barcode: T 100031 Due Date: 03/25/2002 Pending Fine: \$0.40</p> <p>Note: Pending fines are calculated as of the report date, and reflect fines that may be charged if overdue items were returned on this date.</p> <p>Outstanding Fines</p> <hr/> <p>Ten little circus mice Barcode: T 102347 Fine Type: DAMAGED Fined On: 03/04/2002 Amount Due: \$1.25</p> <p>Total Fines Due: \$1.25</p> <p>Holds/Reserves</p> <hr/> <p>The bears' Christmas Placed On: T 100004 Expires: 04/30/2002 Status: Pending</p> <p>A B Cedar : an alphabet of trees Placed On: T 4939 Expires: 06/15/2002 Status: Reserved 05/15/2002–05/29/2002</p> <p>Remember – all library books are due by 7/1/2002.</p> |
|--|

Showing and hiding patron pictures

If your library has patron pictures for patron records, you will have the option to show those pictures.

See also: For information on attaching pictures to patron records, see page 189.

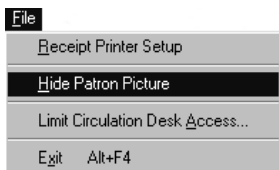
From the Circulation Desk File menu, choose Show Patron Picture.



The patron's picture appears in the lower right corner of the Circulation Desk. The Patron Picture window can be moved to a different location on the desktop.

Note: If no patron picture is available when Show Patron Pictures is selected, the patron picture window will display the message, "No picture available."

To stop displaying patron pictures on the Circulation Desk, choose Hide Patron Picture from the Circulation Desk File menu.



Transactions 101

The basic transactions you can perform using Circulation Desk include: checking out and checking in copies, renewing copies, creating fines and collecting fine payment, marking copies lost, and placing holds and reserves for patrons.

To perform any transaction, you need to retrieve a patron, a copy, or both. There are three ways to retrieve the patron or title you want:

- Scan a barcode label in the Type or Scan a Barcode text box.
- Type a barcode in the Type or Scan a Barcode text box. To look up a patron by their ID number, type a "/" followed by the patron's ID.
- Select the patron or title using the Find Patron and Find Title buttons to the right of the Type or Scan a Barcode text box.

To ensure that you retrieve all of your patrons and copies quickly and accurately, we recommend you use a scanner.

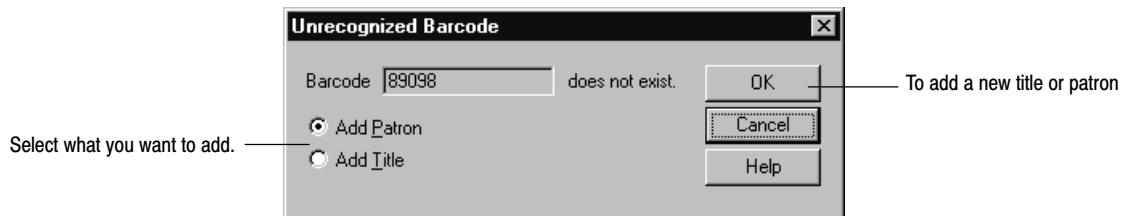
Typing or scanning barcodes

When you successfully scan a barcode, it immediately appears in the Type or Scan a Barcode text box.

Note: If you type your barcodes and are using a Follett Classic barcode symbology for both patrons and copies, we recommend that you type the preceding “P” or “T” (the type identifier). If you do not, there could be confusion between patron and library material barcodes.

If the barcode matches the symbology defined in System Setup, but doesn’t match a patron or a copy in your database, a message appears asking if you want to add the title or patron, depending on the situation.

While in the Check Out window, if you have already scanned a patron successfully, and then scan a barcode that Circulation Desk cannot identify as either a patron or a copy, the Unrecognized Barcode message box appears:



See also: For information about adding titles from Circulation Desk, see “Adding a title during a checkout” on page 139. To add patrons from Circulation Desk, see “Adding or editing a patron” on page 139.

Finding patrons or copies

If a barcode is damaged, or not present, you can still search for patrons or library materials using the Find Patron and Find Title buttons.

Circulation Desk allows you to search for patrons by name, barcode, patron ID number, and by a phonetic equivalent of the last name (name sounds like).

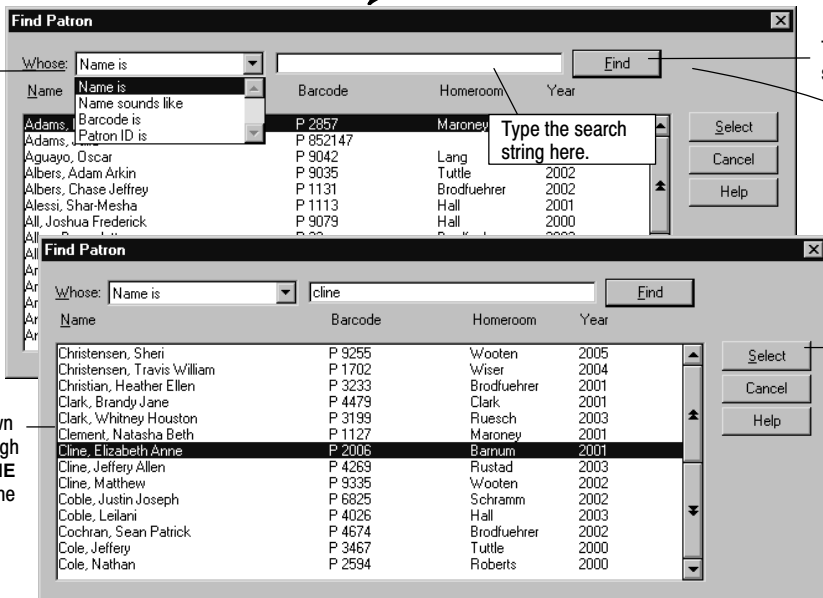
From the Circulation Desk window, select the Find Patron button. The Find Patron dialog appears:



From the Whose drop-down list, select the type of search you want to perform. If searching by name, type the name as Last, First. If searching by Name sounds like, type in the closest phonetic equivalent of the patron's last name.

If you have trouble finding a patron one way, try another type of search.

You can use the up and down arrow keys to navigate through the list of patrons. The HOME key takes you to the top of the list, and the END key takes you to the end of the list.



To initiate the search

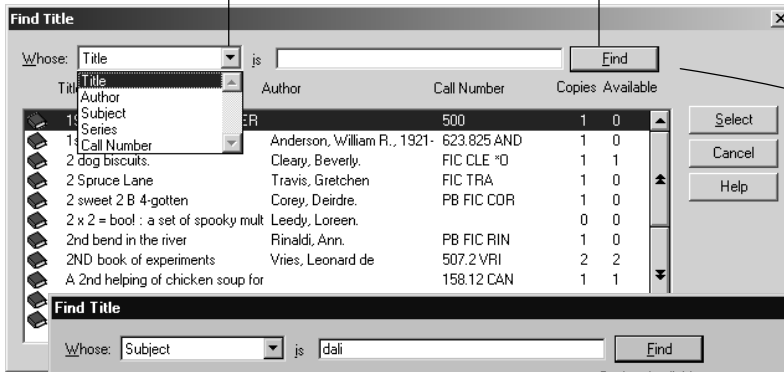
To select the highlighted patron

From the Circulation Desk window, select the Find Title button. The Find Title dialog appears:



From the Whose list, select the type of search you want to perform. If you have trouble finding a title one way, try another type of search.

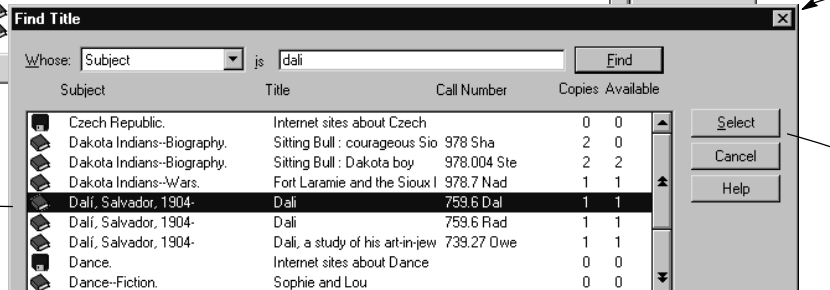
Type the search string in the text box and choose Find.



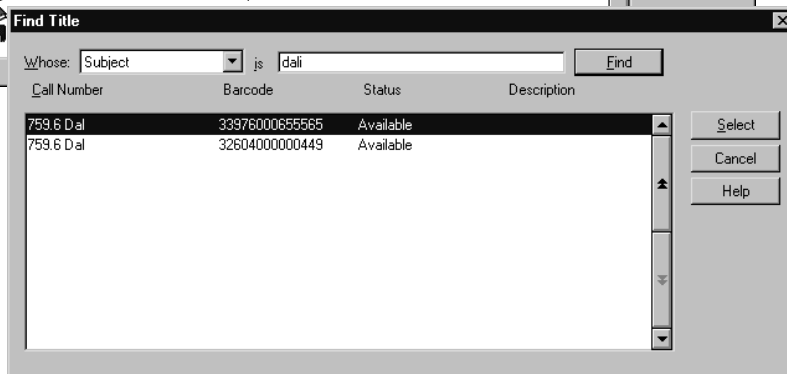
To initiate the search

From the list of titles, highlight the desired title and choose Select. The list of titles changes to show a list of copies for the title.

You can use the up and down arrow keys to navigate through the list of titles and copies. The HOME key takes you to the top of the list, and the END key takes you to the end of the list.

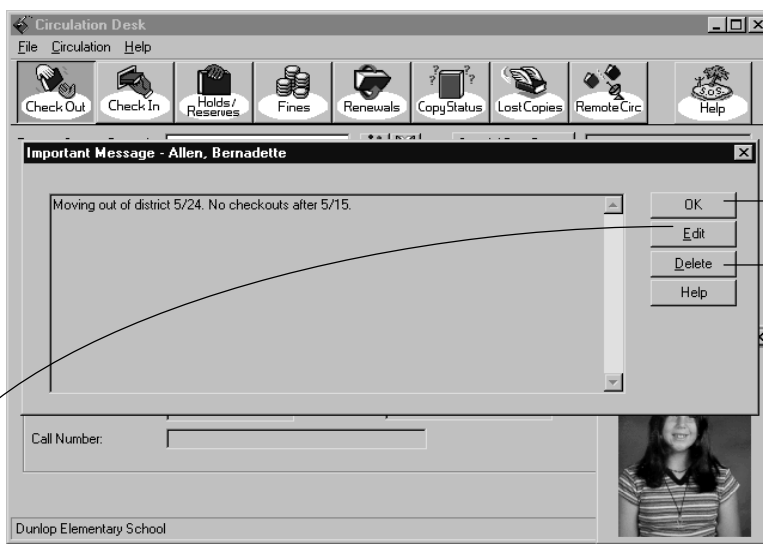


Highlight the desired copy and choose Select.



Important messages for patrons

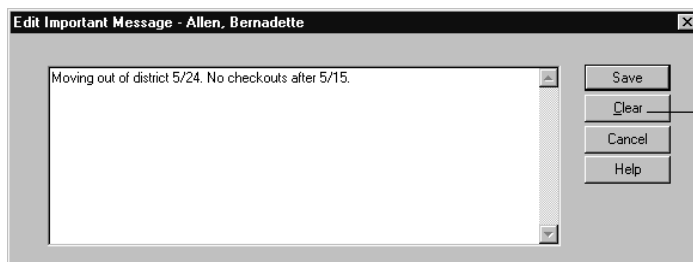
Once a patron is selected by scanning, typing, or using the Find Patron dialog, if an important message exists for the patron, this message is displayed. An important message must be created for the patron in Patron Maintenance or from the Edit Patron button in Circulation Desk (see "How to add or edit an important message or a note," page 189).



To edit the Important Message, click Edit. If a password has been defined for Patron Maintenance, enter the password. Edit the message, and then click Save.

To close the Important Message and return to the Circulation Desk window, click OK.

To remove the Important Message from the patron's record, click Delete. If a password has been defined for Patron Maintenance, enter the password.



To remove the message from the patron's record, click Clear and then click Save.

Sounds

The following table describes the reasons that sounds might occur when you scan or type a barcode in Circulation Desk. These sound events are defined in System Setup and are intended to help you monitor transactions without having to keep your eyes constantly focused on your computer screen. More than one of these sounds can occur when you scan a barcode. For information about setting up sounds for Circulation Desk, see "Setting up alert sounds (and more) for your circulation desk" on page 88.

Note: If your Circulation Desk workstation does not have a sound card, you cannot define sounds for these events. However, even if you do not have a sound card, there are default sounds associated with these events that are emitted by your system speaker.

Circulation Desk barcode scanning sounds

| Circulation Desk sound event | Cause for sound |
|--|---|
| Successful Barcode Entry | Each time you scan a valid barcode, and successfully retrieve the patron or copy, you hear this sound. If you are scanning barcodes, this sound plays in addition to the beep from the scanner. |
| Block Condition | If you try to perform a transaction that violates the circulation policies you define in System Setup, you hear this sound. |
| Checkout of Non-Standard Circ Type | If you check out a copy with a circulation type that is different than the Standard Circ Type defined in System Setup (see page 88), you hear this sound. |
| Patron has Fines or Overdues | If this sound is defined, when you scan a patron's barcode, you hear this sound if the patron has any overdue copies or any fines. |
| Checkin Readies Hold/Reserve | If this sound is defined, when you scan a copy's barcode, you hear this sound if the copy readies a hold or reserve. |
| Checkin Creates Fine | If this sound is defined, when you scan a copy's barcode, you hear this sound if the copy generates a fine. |
| Checkin for In-Library Usage | If this sound is defined, when you scan a copy's barcode, you hear this sound if the copy checked in is In-Library Usage. |
| Checkin of Non-Standard Copy Status | If this sound is defined, when you scan a copy's barcode, you hear this sound if the copy has a non-standard copy status. |
| Checkin of Temporary Item | If this sound is defined, when you scan a copy's barcode, you hear this sound if the copy is a temporary item. |

Note: A checkin of an item with a non-standard copy status includes an item that has a status of "At The Bindery," "Loaned Out," "Missing," "Lost," or "Refund Due." It also includes the checkin of an item that is not checked out when In-Library Usage is turned off.

Handling block conditions during a transaction

The circulation policies you define in System Setup regulate transactions in Circulation Desk with the help of block conditions. Whenever a patron violates a policy, a message appears listing the policy or policies that the patron has violated. The following table describes the block messages:

Transaction block conditions

| Message | Cause |
|---|---|
| Checkout limit reached | The patron is attempting to exceed the maximum number of copies allowed to this patron type. The Checkout limit may be set to "0". You can change it in System Setup. |
| Checkout limit reached for this circ type. Proceeding with the transaction will override the maximum limit for ALL circ types. | The patron is attempting to exceed the maximum number of copies allowed to the circulation type set up for this patron type. |
| Expired library card | The patron's library card has expired. |
| Fine threshold reached | The patron's accumulated fines have reached the fine threshold defined for this patron type. The Fine threshold may be set to "0". You can change it in System Setup. |
| Holds limit reached | The patron has attempted to place more holds than is allowed by this patron type definition. The Holds limit may be set to "0". You can change it in System Setup. |
| Inactive or restricted patron | This patron has a status of inactive or restricted. This usually means that you have restricted or suspended the patron's borrowing privileges. |
| Overdue limit reached | The patron is trying to check out or renew more copies after reaching the patron type limit for number of overdue copies. The Overdue limit may be set to "0". You can change it in System Setup. |
| Renewal limit reached | The patron is trying to renew a copy that has already been renewed before and has reached the renewal limit. The Renewal limit may be set to "0". Change it in System Setup. |
| Special due date now obsolete | The special due date is in the past. If you override this block, anything you check out or renew for this patron is automatically overdue. |
| <title> (barcode: <barcode>) is a Non-circulating copy | Non-circulating eBook (*NC) is a special Circulation Type. You cannot circulate this circulation type nor override the block condition message. If you wish to check out this copy, you must first change its circulation type in Cataloging. |

If a block condition exists for a patron, a block condition informational message will appear each time you attempt to perform a transaction for that patron. In order to complete the transaction, you need to override the block condition. Once the block condition has been overridden, the block condition message will not appear again during the current checkout session. If you perform transactions for other patrons, returning to the patron with block conditions will begin a new session, and the block condition messages will again appear until overridden.

If you prefer greater control over the ability to override block conditions, then you may want to define the Circulation Desk Override password. Once you have defined the Circulation Desk Override password in System Setup, you must enter the password to complete the transaction.

Note: You cannot override the block condition, "<Title> (barcode: . . .) is a Non-circulating copy."

See also: For more information about setting up the block condition password, see "Protecting your Follett applications with passwords" on page 40.

If block conditions appear too frequently while checking out or renewing copies, you might want to reevaluate and update your circulation policies in System Setup. For information about setting your circulation policies, see "Circulation policies: who can have what and for how long" on page 76.

Adding or editing a patron record

You can add a new patron from the Checkouts, Holds/Reserves, Fines, or Lost Copies window by selecting Add Patron from the Circulation menu and defining the patron information exactly the same way you would when adding a patron in Patron Maintenance. If a scanned patron barcode is not associated with a patron in your patron list, Circulation Desk prompts you to add the patron and opens the Add Patron dialog if you choose to do so. For information about adding patrons, see "How to add or edit a patron record" on page 187.

To edit a patron you must first select a patron from the Find Patron dialog, or by scanning a patron barcode, then select Edit Patron from the Circulation menu or click the Edit Patron button to the right of the Patron Group Box. You are presented with the Edit Patron dialog where you can make your changes.

Viewing and printing patron information

You can view the following information about a patron from either Circulation Desk or Patron Maintenance: current checkouts; transaction statistics including current and accumulated counts; personal information including addresses, and location and user fields; current and pending fines; current holds and reserves; and any patron note or important message that has been entered for the patron.

You can print the following information about a patron from either Circulation Desk or Patron Maintenance: current checkouts, overdues, holds, and reserves; pending fines, assessed fines; and circulation statistics.

To view or print detailed patron information from a Circulation Desk window, select a patron and choose Patron Info in the patron information box. The Patron Information dialog appears with the Checkouts tab open:

The screenshot shows a 'Patron Information' dialog box with the following fields and tabs:

- Patron Identification:** Name: Cook, Jacqueline May; Homeroom: Maroney; Barcode: P 6749; ID: ; Card Expiration: 6/30/2004; Status: Active; Type: Student; Grad Year: 2004.
- Buttons:** Close, Print..., Help.
- Tabs:** Checkouts (selected), Stats, Personal, Fines, Holds, Note, Message.
- Checkouts Table:**

| Title | Price | Call Number | Barcode | Due Date |
|----------------------|---------|-------------|---------|-----------|
| Living in space | \$17.95 | 629.47 Ber | T 3288 | 3/17/2000 |
| The blind Connemara. | \$12.95 | FIC And | T 3271 | 3/21/2000 |
| Horses of heaven | \$20.00 | 813.54 Bra | T 5444 | 3/21/2000 |

Annotations:

- Basic patron identification always appears at the top.
- To view the various types of patron information, select the corresponding tab.
- The Checkouts tab shows a list of the patron's current checkouts sorted by due date.
- To print checkouts, overdues, holds, reserves, and fines.

Each tab shows detailed information about the patron:

The Stats tab shows the current transaction counts, the circulation limits defined in System Setup, and some cumulative circulation statistics.

This column shows the limits defined for patrons of this patron type. These limits are defined in the Policies tab in System Setup.

Click to view or print circulation statistics for the selected patron. For information about the Patron Circulation Statistics dialog, see page 133.

The Personal tab shows detailed personal information, including primary and secondary addresses and phone numbers.

The Fines tab shows a list of the patron's current assessed fines, including the balance due for each fine. If the fine has a note, double-click on the fine to display the note.

If you chose to automatically calculate overdue fines in System Setup and the patron has overdue items, a note at the bottom of this tab contains the current pending fine amount for those overdue items.

The Note tab displays any note you created in Patron Maintenance for this patron. This is the only place this patron note displays in Circulation Desk.

The Holds tab shows a list of the patron's current holds and reserves, including the current status; when it expires; and whether it is on the first available copy or a specific copy.

The Message tab displays any important message you created in Patron Maintenance. This message displays each time a patron is selected in Circulation Desk.

Stats Tab Data:

| Transactions | Current | Limit |
|--------------|---------|---------|
| Checkouts: | 3 | 3 |
| Overdue: | 2 | 3 |
| Fines: | \$12.26 | \$15.00 |
| Holds: | 2 | 3 |
| Ready: | 0 | |

Circulation Statistics:

Lifetime: 6
 Last Year: 37
 This Year: 6
 This Month: 3

Personal Tab Data:

Primary Address: 1486 John Henry Ln, Canton NC 28716, 520-774-2116, jcook@aol.com
 Gender: Female
 Birth Date: 6/15/1989
 Secondary Address: P O Box 432, Canton NC 28716
 Homeroom: Maroney
 Locker No.:
 Library period:
 User Field 2:

Fines Tab Data:

| Title | Call Number | Barcode | Amount Due |
|---|-------------|---------|------------|
| Black Beauty : the autobiography of a horse | FIC Sew | T 4076 | \$9.50 |
| Horses | 636.1 Dev | T 8523 | \$0.20 |
| The girl who loved wild horses | E Goble | T 1223 | \$0.70 |
| The horses of Central Park | FIC Sla | T 9654 | \$5.00 CR |

Holds Tab Data:

| Title | Call Number | Placed On | Expires | Status |
|---|-------------|-----------|------------|----------|
| The crooked colt | | Any | 10/31/2001 | Ready |
| Caballos, cabillos, cabillos | 636.1 Fow | Copy | 1/9/2002 | Pending |
| A practical guide to riding and pony care | 798.2 RAW | Copy | 1/9/2002 | Pending |
| All color world of horses | 636.1 CHU | Copy | 1/22/2002 | Reserved |

Note Tab: Looking for books on horse trails in the Appalachians.

Message Tab: Remind her to pay her fines.

Note: If the Collect Patron Transaction Histories check box in System Setup is unchecked and you have removed patron history in Utilities, no statistical information will be displayed on the Stats tab.

To take action on any checkouts, fines, holds, or reserves, switch to the appropriate Circulation Desk window.

To print patron information from one of the tabs, choose Print on the Patron Information dialog. The Print Patron Information dialog appears:

The following sample shows what the printout might look like:

| Springtree Montessori | | Page 1 | |
|--|-----------|--------------------|-----------|
| 10/14/2002 @ 03:21 pm | | Patron Information | |
| ----- | | | |
| Name: Mulder, Dana | | | |
| Barcode: P 20 | | | |
| CHECKED OUT | Barcode | Due Date | Call # |
| ----- | | | |
| Artificial intelligence, fulfilling the dream. | | | |
| | T 21054 | 10/21/2002 | VIS 006.3 |
| Everyday life in Bible times. | | | |
| | T 88008 | 10/28/2002 | REF 220.9 |
| Semantics: studies in the science of meaning, | | | |
| | T 21103 | 10/28/2002 | 412 |
| OVERDUE | Barcode | Due Date | Est. Fine |
| ----- | | | |
| Patron does not have overdue items. | | | |
| FINES OWED | Barcode | Fined On | Amount |
| ----- | | | |
| Area handbook for Japan. | | | |
| | T 21081 | 09/16/2002 | 10.00 |
| Artificial intelligence : opposing viewpoints | | | |
| | T 21056 | 09/27/2002 | 2.00 |
| Semantics: studies in the science of meaning, | | | |
| | T 21103 | 09/18/2002 | 10.00CR |
| HOLDS/RESERVES | Placed On | Expires | Status |
| ----- | | | |
| Metaphor and meaning. | | | |
| | T 21127 | 10/21/2002 | Pending |
| Poetry, language, thought. | | | |
| | T 20531 | 09/10/2002 | Expired |
| The key. | | | |
| | T 8053 | 10/20/2002 | Reserved |

To view the number of circulation and holds transactions recorded for the selected patron during a given time period, select the Details button on the Stats tab. The Patron Circulation Statistics dialog appears:

Enter a number from 1 to 90.

| Period | Circulations | Holds Placed |
|---------|--------------|--------------|
| 03/2000 | 4 | 1 |
| 02/2000 | 3 | 0 |
| 01/2000 | 2 | 2 |
| 12/1999 | 8 | 0 |
| 11/1999 | 6 | 0 |
| 10/1999 | 6 | 0 |
| TOTAL | 29 | 3 |

List includes hours, days, months, and years.

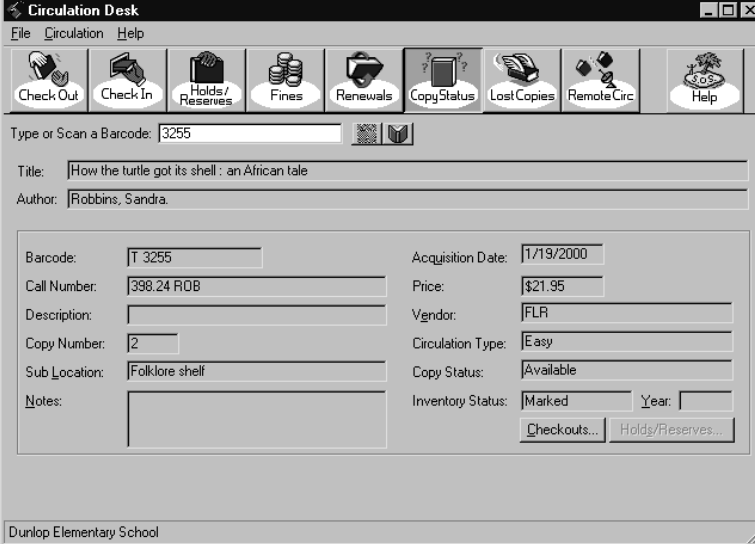
Updates the current data with the patron's circulation statistics for the selected period.

Prints the patron's circulation statistics.

Note: If the Collect Patron Transaction Histories check box in System Setup is unchecked and you have removed patron history in Utilities, no statistical information will be displayed in this dialog.

Viewing the current status of a copy

From the Copy Status window you can retrieve the status of any copy in your collection by scanning its barcode or by selecting it using the Find Title button. This feature enables you to find out quickly when a copy is due. The Copy Status window appears as follows:



The screenshot shows the 'Circulation Desk' software interface. At the top, there is a menu bar with 'File', 'Circulation', and 'Help'. Below the menu bar is a toolbar with icons for 'Check Out', 'Check In', 'Holds/Reserves', 'Fines', 'Renewals', 'Copy Status', 'Lost Copies', 'Remote Circ', and 'Help'. The 'Copy Status' button is highlighted. Below the toolbar, there is a search bar labeled 'Type or Scan a Barcode:' with the value '3255'. Below the search bar, there are fields for 'Title:' (How the turtle got its shell : an African tale) and 'Author:' (Robbins, Sandra). Below these fields, there is a grid of fields for copy details:

| | | | |
|---------------|----------------|-------------------|--------------|
| Barcode: | T 3255 | Acquisition Date: | 1/19/2000 |
| Call Number: | 398.24 ROB | Price: | \$21.95 |
| Description: | | Vendor: | FLR |
| Copy Number: | 2 | Circulation Type: | Easy |
| Sub Location: | Folklore shelf | Copy Status: | Available |
| Notes: | | Inventory Status: | Marked Year: |

At the bottom right of the grid, there are buttons for 'Checkouts...' and 'Holds/Reserves...'. The bottom of the window displays 'Dunlop Elementary School'.

You can access and manage the hold queue from the Copy Status window by choosing the Holds/Reserves button in the Copy Status window. For more information about the hold queue, see page 165.

To view the recent checkouts of a copy, choose Checkouts in the Copy Status window. The Checkouts dialog appears:

| Current Checkout | | Last Checkout | |
|------------------|----------------------|-----------------|------------------|
| Due Date: | 3/21/2000 | Date Returned: | 3/7/2000 |
| Patron Name: | Cook, Jacqueline May | Patron Name: | Arellano, Manuel |
| Patron Type: | Student | Patron Type: | Student |
| Patron Barcode: | P 6749 | Patron Barcode: | P 7979 |
| ID: | | ID: | |
| Homeroom: | Maroney | Homeroom: | Barnum |
| Locker No.: | 687 | Locker No.: | 523 |

| Circulation Statistics | | | |
|------------------------|----|------------|----|
| This Month: | 3 | This Year: | 18 |
| Last Year: | 29 | Total: | 47 |

To view circulation and hold statistics for the selected copy, choose Copy Details. To view circulation and hold statistics for the title, choose Title Details.

Statistics for: How the turtle got its shell : an African tale (Std. Number: 91175269 /AC)

Show statistics for: Copy Circulation Statistics

Statistics for: How the turtle got its shell : an African tale (Barcode: T 3255)

Show statistics for the prior: 6 Months

| Period | Circulations | Holds Placed |
|---------|--------------|--------------|
| 03/2000 | 3 | 0 |
| 02/2000 | 5 | 1 |
| 01/2000 | 1 | 0 |
| 12/1999 | 6 | 1 |
| 11/1999 | 0 | 0 |
| 10/1999 | 3 | 0 |
| TOTAL | 18 | 2 |

Period list: 03/2000, 02/2000, 01/2000, 12/1999, 11/1999, 10/1999, TOTAL

List includes hours, days, months, and years.

Updates the current data with the system's circulation statistics for the selected period.

Prints the circulation statistics for the title or copy selected.

Sending items to the bindery or on inter-library loan

Circulation Desk does not track items that you loan to other libraries or items that you send to a bindery for repairs. You must create your own manual tracking system for these situations. However, you can change the copy status of an item in Cataloging to At the Bindery or On Loan to indicate the location of the item. When the items return, you can check them in in Circulation Desk to change the copy status back to Available. Items that have a copy status of At the Bindery or On Loan will have a status of OUT in the OPAC.

Troubleshooting

This table lists some problems that may occur while using Circulation Desk:

Basic troubleshooting for Circulation Desk

| Problem | Suggestion |
|--|--|
| Copy barcode won't scan Patron barcode won't scan | If a barcode won't scan properly, try cleaning your scanner head, then consult the documentation that came with your scanner, or see the Appendix. If you receive a message stating that the barcode is invalid, test the patron or copy barcode in System Setup Setup Site Barcodes to verify that the symbology is valid for your system. |
| Can't find the patron | If you're searching for a patron and you've only tried searching by Name, try searching by barcode and typing the barcode that appears on the patron's library card. If that fails, try searching by Patron ID. You can also try searching by the phonetic equivalent of the last name (Name sounds like). |
| Can't find the title | If you can't find the title from Circulation Desk using the Find Title button, which allows you to search by title, author, subject and series, try switching to Cataloging and using a different search method, such as by call number. |

The following table lists some error messages that might appear while starting Circulation Desk or while searching for a copy.

Circulation Desk startup and Find Title error messages

| Message | Cause |
|---|---|
| The end of the year is approaching. Be sure to create a calendar for . . . | You need to create a calendar for the coming year in System Setup. See also: "Setting up your library's current calendar" on page 85. |
| There are no copies for this title. | This message appears in the Find Title dialog when you are attempting to select a title for which there are no copies. |
| There are no loan periods defined. You will not be able to circulate until loan periods have been defined in System Setup Setup Circulation Policies. | In order to perform any checkouts or renewals, you must start System Setup from Start Programs Follett Applications and define your loan periods for all of your patron types for each of your circulation types. See also: For information about setting up your loan policies, see "Circulation policies: who can have what and for how long" on page 76. |
| Unable to locate . . . calendar. Create a calendar in System Setup Setup Circulation Calendar. | Circulation Desk was not able to locate the calendar for the current year during startup. Exit Circulation Desk before creating a calendar in System Setup. You should not try to perform any checkouts or renewals until you set up your calendar. See also: For information about creating a calendar, see "Setting up your library's current calendar" on page 85. |

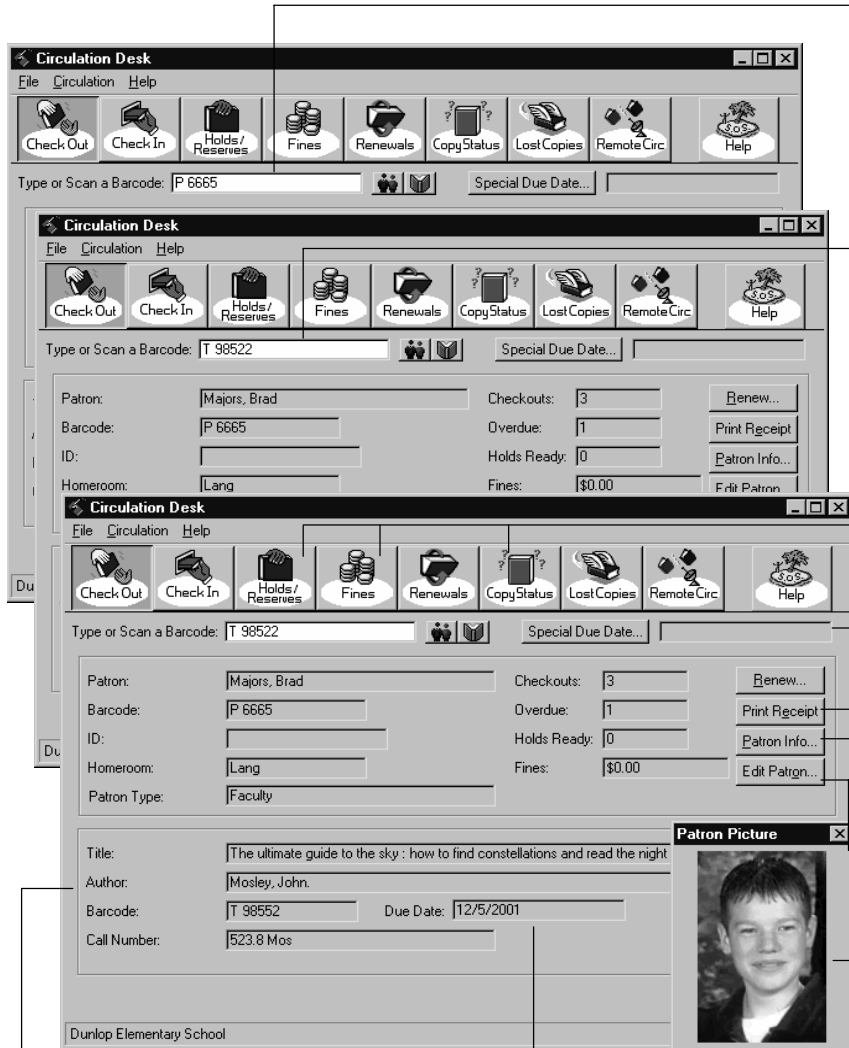
Chapter 8 Checking out items

This chapter provides instructions for checking out copies, adding or editing patrons during a checkout, adding titles during a checkout, handling non-circulating items, showing due dates, and setting special due dates for checkouts and renewals.

Important: It is very important to set up your calendar in System Setup for the coming year before you check out items in Circulation Desk that will be due after year's end. If you don't have a calendar defined, Circulation Desk creates a new calendar for you based on your default annual calendar. For more information about defining a calendar, see "Setting up your library's current calendar" on page 85.

How to check out a copy

The basic checkout procedure involves entering two barcodes: the patron barcode and the copy barcode:



Type or scan the patron barcode. If the patron barcode is missing or damaged, use the Find Patron button.

When Circulation Desk retrieves the patron successfully, the Important Message dialog displays (if there is a message) and brief patron information appears in the patron information box.

To know more about important messages, see "Important messages for patrons," page 126.

Next, scan the copy barcode. If the copy barcode is damaged or missing, use the Find Title Button.

Block messages appear if the patron has violated any circulation policies. If the Circulation Desk Override password is defined in System Setup, you must enter that password to complete the transaction.

To see the current patron's fines or holds and reserves, select the appropriate toolbar button.

To get information about a copy's previous checkouts, choose Copy Status. See "Viewing the current status of a copy," page 134.

Before checking out or renewing copies, check to see if a special due date is active.

To print a receipt for the patron's current transaction

See Receipt Printing setup and printing on page 120 for more information.

To view and print detailed information about the current patron

To access the Edit Patron dialog

When Show Patron Picture is selected from the File menu, a picture displays if a photo is attached to the patron's record.

If the checkout is successful, relevant copy information appears in the title information box.

If no special due date is active, the due date for the checkout is determined by the circulation policies defined in System Setup (see page 77). If a ceiling date was used to determine the due date, Ceiling Date Used appears next to the Due Date.

If the copy you are checking out requires special attention, a circulation note may appear. Circulation notes are attached to the copy record in Cataloging. For more information about circulation notes, see Chapter 24, "Working with copies."

If Circulation Desk cannot find the patron or the title in your database, you can add them during a checkout. For more information, see "Adding or editing a patron" and "Adding a title during a checkout," both on page 139.

If the loan period for the copy is defined as zero, a message appears stating that the copy is non-circulating. For more information about non-circulating copies, see “Handling non-circulating copies” on page 141.

If you try to check out or renew a copy that has a pending or ready hold or reserve on it for another patron, a message appears asking you to confirm this action. Since this message does not require a password to override it, you may want to communicate your policy regarding holds and reserves to your staff.

If you try to check out a copy that has a future reserve on it, and the normal circulation period would overlap the reserve period, Circulation Desk alerts you with a message. It also automatically shortens the loan period so that the item is due on the day before the pre-reserve processing date.

If the reserving patron retrieves the item *before* the reserve period, you need to delete the reserve before checking out the item. This avoids any loan-period shortening intended to protect the reserve.

See also: For more information about searching for patrons or copies, see “Finding patrons or copies” on page 123.

See also: For more information about block conditions, see “Handling block conditions during a transaction” on page 127.

Adding or editing a patron

You can add a new patron from the Circulation Desk main window by selecting Add Patron from the Circulation menu and defining the patron information exactly the same way you would when adding a patron in Patron Maintenance. You return to the Check Out window upon saving the patron record. You can also add a patron from the Holds/Reserves, Fines, and Lost Copies windows. Additionally, if a scanned patron barcode is not associated with a patron currently in your patron list, you are prompted to add the patron and taken to the Add Patron dialog if you choose to do so. For information about adding patrons, see “How to add or edit a patron record” on page 187.

To edit a patron you must first select a patron from the Find Patron dialog, or by scanning a patron barcode, then select Edit Patron from the Circulation menu or click the Edit Patron button to the right of the Patron Group Box. You are presented with the Edit Patron dialog where you can make your changes. As when adding a patron, you return to the Check Out window upon saving the patron record.

Note: You can turn off the ability to add or edit patrons during checkout by using the Limit Circulation Desk Access function. See “Limiting and restoring access to Circulation Desk” on page 118 for more information. You must still use Patron Maintenance to delete patrons.

Adding a title during a checkout

When adding titles during checkout, Circulation Desk gives you the option of creating temporary or permanent records. Whether you add a temporary or a

permanent record, Circulation Desk assigns a material type of Book (Monograph) to all titles created during a checkout.

A temporary title record is for titles that change frequently or have short circulation periods. For example, you might use temporary title records to circulate paperbacks and unbound magazines. Note, however, that you cannot change temporary records to permanent records later.

When you create a temporary title, Circulation Desk automatically assigns the Temporary category and circulation type and the TEM call number prefix to it. Circulation Desk does this so that you can collect circulation statistics on temporary copies. In addition, Circulation Desk does not create keywords for temporary titles when you save the record, and temporary titles cannot be exported or enhanced with Alliance Plus.

The temporary title and its copy are deleted when the copy is checked in. If, however, there are any fines or holds on the temporary copy, the temporary title and copy are not deleted until all pending transactions have been addressed.

Tip: If you intend to add temporary titles from Circulation Desk, you may want to keep a stack of cards with unused barcodes at the circulation desk. When you check out a temporary copy, you paper-clip the card to the temporary item. When the item is checked in again, and Circulation Desk deletes the temporary title and its copy, you can put the card back into the stack so that it can be reused with the next temporary item.

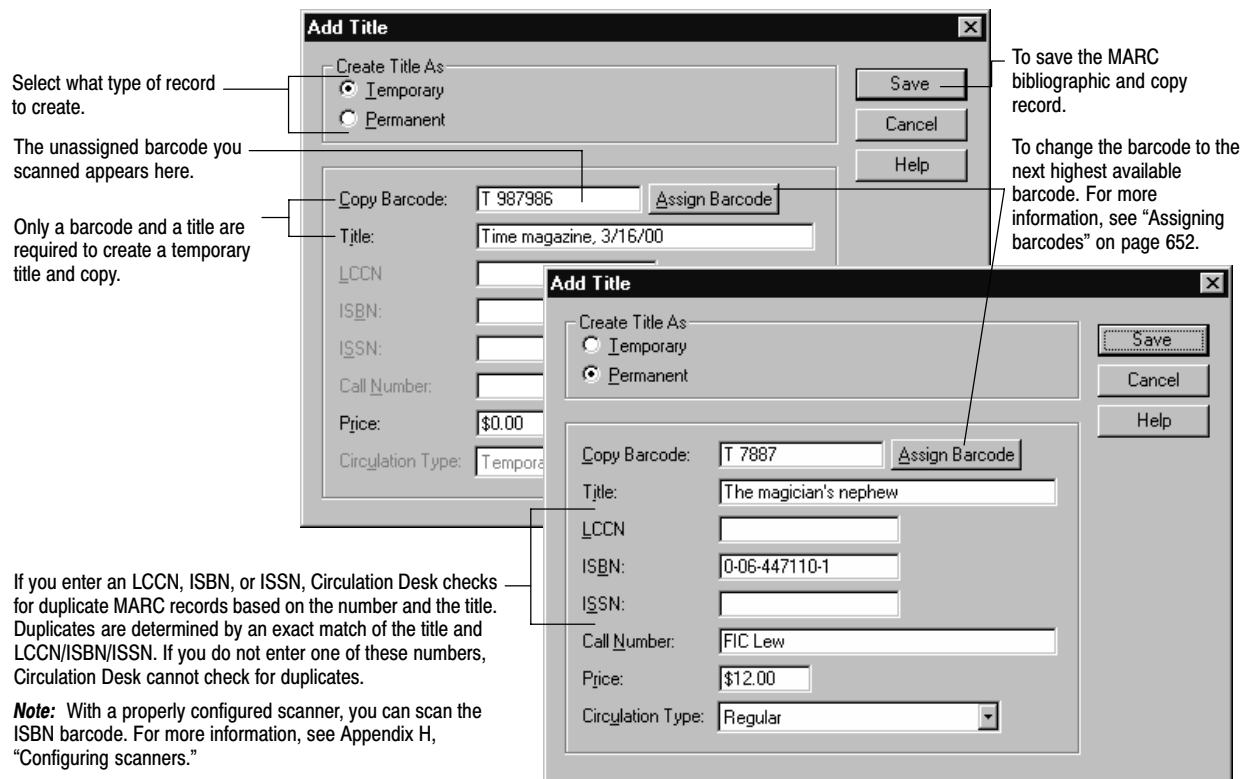
The option to add permanent title records allows you to quickly create a brief title record without leaving Circulation Desk and disrupting the checkout procedure. Note, however, that when you create a permanent title record during a checkout, Circulation Desk checks to see if the bibliographic record you are adding is a duplicate if you enter an LCCN, ISBN, or ISSN. If you enter one of these numbers, Circulation Desk only checks for duplicate titles by looking for records that contain an identical title and identical LCCN, ISBN, or ISSN. While it is convenient to add brief records from Circulation Desk, this feature is probably best used for temporary records. If you do catalog permanent title records from Circulation Desk, we recommend that you periodically run a Brief Records Report and enhance your brief records in Cataloging. For more information about the Brief Records Report, please refer to Chapter 37, "Cataloging reports."

Tip: Instead of adding brief records during a checkout, if you use the multiuser Follett applications and have Cataloging available from your Circulation Desk workstation, you can open Cataloging to create a full record. If Cataloging has already been started, you can press **ALT + TAB** to switch to it.

See also: For more information about cataloging brief and full records, see Chapter 23, "Using the MARC Editor."

Note: You can turn off the ability to add titles during checkout by using the Limit Circulation Desk Access function. See "Limiting and restoring access to Circulation Desk" on page 118 for more information.

1. In the Type or Scan a Barcode text box, type or scan an unassigned barcode. If your patron and copy barcodes are distinct, a message appears asking you if you want to add a title. If Circulation Desk cannot distinguish your patron from your copy barcodes, a message box appears, giving you the option of creating a patron or a title record. In either case, if you choose to add a title, the Add Title dialog appears:



2. When you finish defining the title/copy information, select Save.

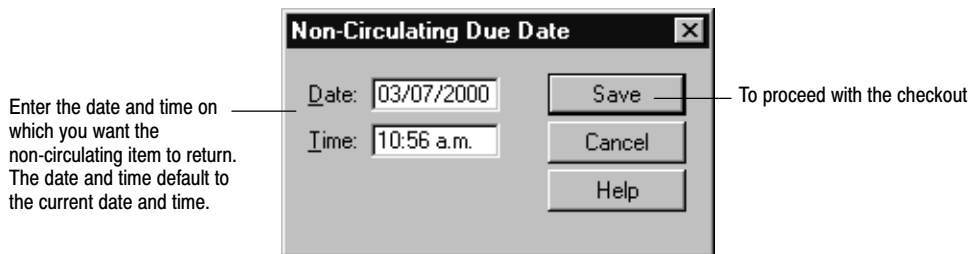
If Circulation Desk determines that you may be adding a duplicate MARC record when you are adding a permanent title, a message appears giving you the option of either adding a copy to the existing title or adding a new title and copy to your collection. Choose the appropriate option and select Save to save the record or Cancel to return to the Add Title dialog.

Handling non-circulating copies

When defining your circulation policies in System Setup, you may decide that certain materials in your collection, such as reference books, bound periodicals, or eBooks, should not circulate. There are two ways to handle these items:

You can create a circulation type (in System Setup/Cataloging/Circ Types) and then edit its loan period (in System Setup/Circulation/Policies), entering 0 (zero) days. Assuming that there is no special due date in effect, whenever a patron tries to check out a copy that has a loan period of zero, a message appears, asking you

if you want to check out the non-circulating copy. If you choose Yes, the Non-Circulating Due Date dialog appears:



If you proceed with the checkout, the non-circulating due date you defined appears in the title information box on the Check Out window as the due date of the copy.

Note: Since there is no option to define a password for checking out or renewing non-circulating copies, you may want to communicate your library policy regarding non-circulating copies to your library staff.

The second method for handling non-circulating items is to use the Non-circulating eBook (*NC) circulation type. *NC is a default circulation type intended for, but not limited to, electronic resources. Its loan period is fixed at 0 (zero) days. Assigning this circulation type to a copy has several effects:

- You cannot circulate the copy. When scanning its barcode in the Checkout window, a block condition message appears. You cannot override the message, nor enter a non-circulating due date as shown above.
- You cannot place a hold, reserve, or fine on the copy. When attempting to do so, a non-overridable message appears.
- You do not inventory the copy. Its inventory status is always Marked.

See also: For information about electronic resource copies, see page 365.

See also: For information about setting up loan policies, see “Circulation policies: who can have what and for how long” on page 76.

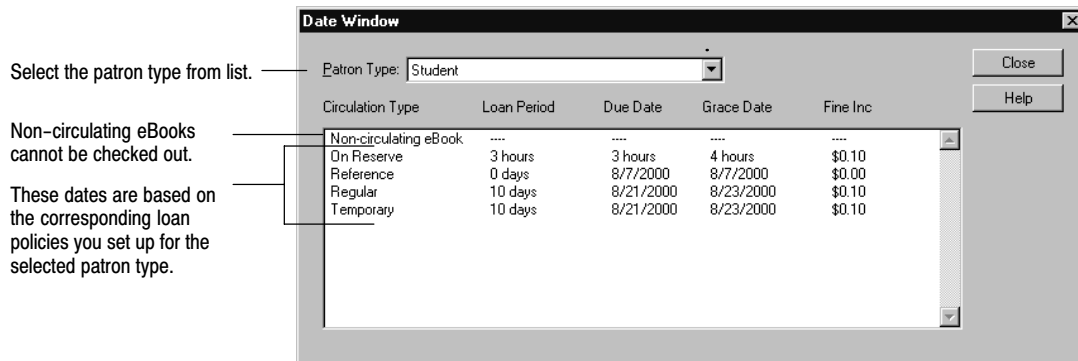
Showing due dates

| Circulation | |
|-----------------------|--------|
| Check Out... | Ctrl+O |
| Check In... | Ctrl+I |
| Holds... | Ctrl+H |
| Fines... | Ctrl+F |
| Renewals... | Ctrl+R |
| Copy Status... | Ctrl+S |
| Lost Copies... | Ctrl+L |
| Remote Circulation... | Ctrl+M |
| | |
| Find Patron... | Ctrl+P |
| Find Title... | Ctrl+T |
| | |
| Add Patron... | |
| Edit Patron... | |
| | |
| Show Date Window... | Ctrl+W |
| Special Due Date... | Ctrl+D |

If you want to check the length of time a patron type can check out an item, you can do so by using the Show Date Window option. This allows you to view the loan policies set up for your patron types.

See also: For more information about setting up your default patron type, circulation types, and patron loan periods, see Chapter 5, “Preparing to circulate your collection.”

From the Circulation menu, select the Show Date Window option. The Date Window displays:



Note: If a Ceiling Date is being used, the Grace Date is based on the Ceiling Date. Special Due Dates do not affect the Due Dates shown for a given Circulation Type.

Special due dates for checkouts and renewals

If you want to override all loan periods (except that for Non-circulating eBooks) defined in the Policies tab in System Setup, you can do so by using a special due date. For example, you might want to check out a collection of reference materials to a teacher for the entire semester for him/her to have in the classroom.

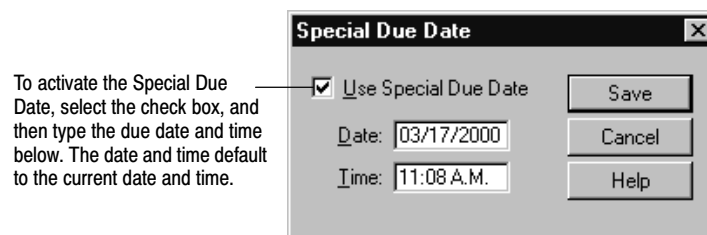
Important: Once activated, the special due date applies to every copy checked out or renewed afterwards. Be sure to turn it off when you finish checking out and renewing copies with the special due date.

When a special due date is in effect, a date appears in red in the text box underneath the Help button on the Circulation Desk toolbar:



Be sure to glance at this text box before checking out or renewing copies.

From the Check Out or Renewals windows, select the Special Due Date button. The Special Due Date dialog appears:



Important: If you try to save a special due date that has already passed, an alert box appears giving you the option of correcting it.

To turn off the special due date, clear the Use Special Due Date check box, and choose Save.

Troubleshooting

The following table lists some of the error messages you might see in Check Out:

Check Out error messages

| Message | Cause |
|---|---|
| A copy that was at the bindery must be checked in before it can circulate. | According to Circulation Desk, the copy the patron is attempting to check out is at the bindery. You must check in the copy before you can check it out. If you keep any records on items that you send to the bindery, you should update them now. |
| A copy that was loaned out must be checked in before it can circulate. | According to Circulation Desk, the copy the patron is attempting to check out is loaned out to another institution. You must check in the copy before you can check it out. If you keep any records on items that you lend to other institutions, you should update them now. |
| Deleted temporary . . . Barcode . . . can now be reused. | This message only appears when you create a temporary copy, but the transaction was not completed, for example, because you decided to discontinue a transaction in response to a block condition. Since the transaction fails, there is no reason for Circulation Desk to create the temporary title and copy. |
| Fine threshold reached. | The total net amount of the patron's fines (not including refunds) is greater than the amount you selected in System Setup Setup Circulation Policies Fines Threshold. |
| Hourly due date is beyond today. Allow? | The patron is checking out a copy that has an hourly circulation period, and the calculated due time extends beyond the library's open hours for today. If you choose Yes, Circulation Desk continues calculating the due time beginning with the opening time on the library's next open day. If you choose No, the closing time on the current date becomes the due time. |
| <title> <barcode> is a non-circulating copy. Check it out anyway? | The copy is non-circulating because the loan period for the circulation type/patron type combination is 0 (zero). See also: For information about setting up your circulation policies, see page 76. |
| <title> <barcode> is a *NC non-circulating copy. | The copy is non-circulation because its circulation type is *NC. To check out this copy, you must first change the circ type. |
| No loan period set up for patron type . . . , circulation type . . . This copy cannot be checked out until the loan period is defined in System Setup Setup Circulation Policies. | This message indicates that not all of your circulation policies have been defined in System Setup. The transaction cannot proceed. See also: For information about setting up your circulation policies, see "Circulation policies: who can have what and for how long" on page 76. |

Check Out error messages (Cont.)

| Message | Cause |
|---|---|
| There are pending holds on . . . Are you sure you want to check it out to . . . instead? | The copy the patron is renewing could satisfy a pending hold. If you continue with the renewal, the hold remains pending and could possibly expire before it becomes ready. If you do not continue, check the copy in to ready the hold. |
| There is no fixed due date defined for patron type . . . | This message indicates that the patron is checking out a copy that has a loan period type of fixed. However, there is no fixed due date defined for the patron type in System Setup. The transaction cannot proceed. |
| This copy has been missing since . . . | The copy the patron is checking out was not accounted for during the inventory for the specified year. After you acknowledge the message, the checkout proceeds. When you check out a copy that was missing, the copy status changes from missing to checked out and the inventory status changes from missing to marked. See also: For more information, see Chapter 19, "Inventory basics." |
| This copy is checked out to . . . Proceed? | The copy the patron is checking out is currently checked out to someone else. This could indicate that the item was reshelved before it was checked in. It could also indicate that the barcode was entered improperly. Make sure the correct barcode has been entered. If you allow the checkout, Circulation Desk checks in the copy and checks it out to the current patron. If you do not allow the checkout, the copy remains checked out to the previous patron. |
| This copy is on hold for . . . If you override the hold and proceed with the checkout, the hold status will revert to "pending" and will become "ready" again at a later date. Proceed with the checkout? | The copy this patron is attempting to check out is intended for the patron who placed a hold on it. If you proceed with the checkout, the status of the hold changes from ready back to pending. When the patron who placed the hold comes to retrieve the copy, you must explain that the hold will be ready again when a copy returns. |
| This copy is on reserve for <reserve date> by <patron> and must be returned by <duedate>. Due date has been adjusted. Proceed with checkout? | The copy this patron is attempting to check out has had a reserve for a future date placed on it. If you proceed with the checkout, the loan period is automatically shortened to accommodate the reserve. |
| This copy was lost. | The copy the patron is checking out or renewing had a copy status of lost. This means that someone reported the copy lost and was most likely assessed a lost copy fine. If so, and if the patron has paid all or part of the fine, Circulation Desk generates a refund. If the patron has not made payment on the fine, then Circulation Desk deletes the fine. |
| Unable to locate default calendar. Create a calendar in System Setup Setup Circulation Calendar. | This message appears if you have not set up a calendar in System Setup Setup Circulation Calendar. |

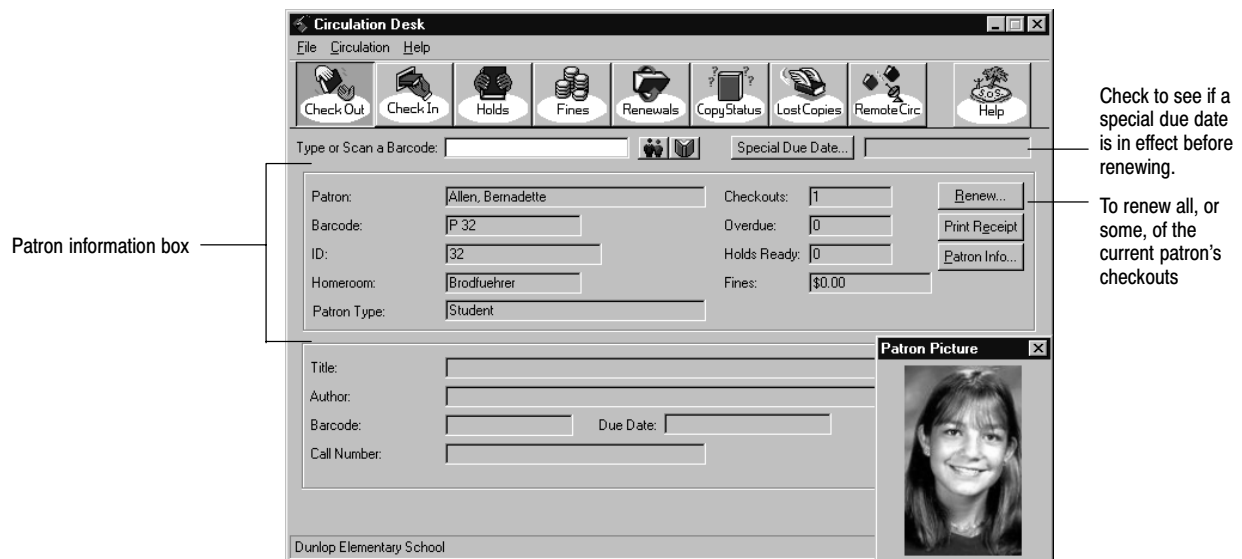
Notes

Chapter 9 Renewing items

In Circulation Desk, you can renew some or all of a patron's checkouts from the Check Out window. You can also renew stacks of copies quickly from the Renewals window, even if they're checked out to different patrons. This chapter provides instructions for both renewal procedures.

Renewing all (or some) of a patron's checkouts

The most common way to renew copies is from the Check Out window. After retrieving a patron, if the patron has any checkouts, the Renew button in the patron information box is activated:



When you choose Renew, the Renew dialog appears:

Choose Renew Selected Copies if only renewing some copies.

List of patron's current checkouts. If only renewing some copies, highlight them on this list.

To renew all or just the selected copies

If Overdue or Renewal Limit icons appear here, block conditions appear if you try to renew these copies. If the Hold Pending icon appears here, a message appears asking you to confirm that you want to renew this checkout.

| Title | Barcode | Due Date | Conditions |
|----------------------------------|----------|------------|--------------|
| Alpha Centauri, the nearest star | T 3605 | 12/10/2001 | |
| Astronomy and planetology | T 4448 | 11/4/2001 | Overdue |
| Project Apollo | T 655573 | 11/4/2001 | Overdue |
| The Milky Way; galaxy number one | T 4447 | 11/21/2001 | Hold Pending |

When you choose Renew in the Renew dialog, the Checkout Renewal progress dialog appears. If Circulation Desk encounters any block conditions during the renewal process, a block message appears. When renewal processing is complete, you can review the new due dates in the Renew dialog. To return to the Check Out window, choose Cancel in the Renew dialog.

If overdue fines are generated during renewal processing, a message appears when processing is complete showing the total of the new fines. You can record payment for those fines by switching to the Fines window. For information about recording fine payments, see Chapter 11, "Dealing with fines and lost copies."

If you try to renew a copy that has a hold pending on it, a message appears asking you to confirm this action. Since there is no option to define a password for overriding holds, you may want to communicate your policy regarding holds to your library staff.

If you try to renew a copy that has a reserve on it, and the normal circulation period would overlap the reserve date, Circulation Desk automatically shortens the loan period so that the renewal is due the day before the pre-reserve processing date. If the processing date has passed and the reserve is pending, a message appears asking you to confirm the renewal.

See also: For more information about block conditions, see "Handling block conditions during a transaction" on page 127.

How to renew a single copy or stack of copies

If a patron, such as a teacher, brings a stack of items to the circulation desk and wants to renew them, you can renew them quickly without retrieving the patron information for each item. To do this, switch to the Renewals window and scan the copy barcode:

Scan or type the copy barcode here.

Brief copy information appears in the title information box.

Brief patron information appears in the patron information box.

Check to see if a special due date is in effect before renewing.

If any block conditions apply to the patron who is trying to renew the item, a block message appears. For more information about block conditions, see “Handling block conditions during a transaction” on page 127.

If the copy you’re renewing requires special attention, a circulation note may appear. Circulation notes are attached to the copy record in Cataloging. For more information about circulation notes, see Chapter 24, “Working with copies.”

If the copy you are renewing is overdue, and if a fine is generated, a message appears. You can record a fine payment by switching to the Fines window. For information about recording fine payments, see Chapter 11, “Dealing with fines and lost copies.”

Troubleshooting

The following table lists some messages that might appear while renewing copies from the Renewals window. For other messages that appear while renewing copies, see Troubleshooting at the end of Chapter 8, “Checking out items.”

Renewal error messages

| Message | Cause |
|--|---|
| This copy is at the bindery and cannot be renewed. Please check it in. | According to Circulation Desk, the patron is attempting to renew a copy that is at the bindery. This might indicate the item was not checked in when it came back from the bindery. To proceed, check the copy in. A message similar to this one appears. Make a note that the copy has returned from the bindery. You can now check the copy out to the patron. |
| This copy is lost and cannot be renewed. Please check it in. | This message might indicate the patron has found a copy that he has previously reported lost and is trying to renew it. To proceed with the transaction, check it in. A message similar to this one appears. You can now check the copy out to the patron. Note: When you check in the copy, if the patron has paid all or part of the lost copy fine, Circulation Desk generates a refund for the amount paid. If the patron has not made payment on the fine, then Circulation Desk deletes the lost copy fine. |
| This copy is missing and cannot be renewed. Please check it in. | The patron is attempting to renew a copy that was not accounted for during a previous inventory. To proceed, check the copy in, then switch to the Check Out window, and check the copy out to the patron. |
| This copy is not checked out and cannot be renewed. | According to Circulation Desk, the patron is attempting to renew a copy that hasn't been checked out. This could indicate that the barcode didn't scan properly. Try scanning the barcode again. |
| This copy is on hold for . . . Since the copy is not checked out, it cannot be renewed. | According to Circulation Desk, the copy should have been on the hold shelf. If you want to allow the transaction, switch to the Check Out window and check the copy out to the patron. |
| This copy is on loan and cannot be renewed. Please check it in. | According to Circulation Desk, someone is trying to renew a copy that is loaned out. If you want to allow this transaction, check the copy in and then check it out to the patron. Be sure to inform the borrowing library that the item has returned, and update your records. |
| Recirculating temporary material. Proceed? | The copy the patron is renewing is a temporary copy, meaning that you intended this copy to have a limited circulation life. If you renew this copy for the patron, the temporary title and copy will remain in the system until the copy is checked in. See also: For information about temporary copies, see “Adding a title during a checkout” on page 139. |

Chapter 10 Checking in items

This chapter provides instructions for checking in copies and handling items on hold or on reserve.

How to check in a copy

Circulation Desk prompts you for the copy barcode at the start of a checkin:

When you scan or type the copy barcode, it appears here.

If the copy's barcode is missing or damaged, try searching for the copy by title. For information about the Find Title dialog, see page 125.

When the copy checks in, brief copy information appears in the title information box.

Brief information about the patron who had the copy checked out appears in the patron information box.

This records circulation statistics for items used in the library even though they were not checked out. See "Reshelving items" on page 152 for more information.

If Circulation Desk assesses an overdue fine for the copy, a message appears after the Due Date, displaying the amount.

To view or print more detailed patron information

To edit the patron record

If the copy you are checking in requires special attention, a circulation note may appear. Circulation notes are attached to the copy record in Cataloging. For more information about circulation notes, see Chapter 24, "Working with copies."

If Circulation Desk creates a refund for a copy that had been marked lost, or if the copy you just checked in satisfies a hold or reserve, a message appears.

If you check in an overdue copy, a message appears after the Due Date in the title information box. If the patron is at the circulation desk and wants to pay the fine, you can record fine payment by switching to the Fines window.

If you want to be alerted by sound when a copy that was checked in readies a hold or reserve, creates a fine, represents In-Library Usage, has a non-standard copy status, or was a temporary item, see the section on setting up alert sounds on page 88.

See also: For information about recording a fine payment, see Chapter 11, “Dealing with fines and lost copies.”

See also: For information about recording items scanned with a PHD for reshelving, see Chapter 13, “Circulating items with a PHD.”

Handling items on hold or reserve

When a patron returns a copy, Circulation Desk checks the hold/reserve queue for any pending holds or reserves on the copy or the title. If it finds either, the copy status for the copy just checked in changes to On Hold and a message appears stating that the hold (or reserve) is ready for the requesting patron. Place the copy on the hold shelf and notify the waiting patron. You can print Ready Hold Notices in Reports.

If you want to be alerted by sound when a copy that was checked in readies a hold or reserve, see the section on setting up alert sounds on page 88.

If you check out, to another patron, a copy that has a hold on it, a message appears, asking you to confirm the checkout. If you do so, the hold status of that item changes back to pending.

If you check out, to another patron, a copy that has a reserve on it, and the normal circulation period would overlap the reserve date, Circulation Desk automatically shortens the loan period so that the item is due on the day before the pre-reserve processing date. If the processing date has passed and the reserve is pending, a message appears asking you to confirm the checkout. If you do so, the reserve status of that item changes back to pending.

See also: For more information about holds and reserves, see Chapter 12, “Managing holds.”

Reshelving items

Record In-Library Usage lets you track items that have been used in your library but not checked out before you reshelve them. The usage statistics are incremented for each item that is scanned to show that the item was used, even though it was not checked out.

If you want to be alerted by sound when a copy that was checked in represents In-Library Usage, see the section on setting up alert sounds on page 88.

If you deselect the Record In-Library Usage check box, you cannot check in an item that has not been checked out. A message appears when you try to check in such an item, stating that the item has not been checked out.

Troubleshooting

The following table lists some other messages that can appear during a checkin.

| Message | Cause |
|--|--|
| The copy cannot be checked in. It has not been checked out. | <p>This message might appear if you are checking in copies that had not been checked out. You do not need to check these copies in before reshelving them.</p> <p>Note: You do not receive this message if Record In-Library Usage check box is selected.</p> |
| Fine threshold reached. | <p>The total net amount of the patron's fines (not including refunds) is greater than the amount you selected in System Setup Setup Circulation Policies Fines Threshold.</p> |
| ... paid a fine for the lost book and will be credited with a refund of \$... | <p>If a patron pays a fine for a lost copy, and the copy is later checked in, Circulation Desk generates a refund for the amount paid when the item is checked in. If this message appears during checkin, and if the patron is there to collect the refund, you can pay the refund by switching to the Fines window.</p> <p>See also: For more information about paying refunds, see "Giving refunds" on page 161.</p> |
| Temporary ... cannot be deleted because there is a fine on it, or there is a hold. Do not reuse barcode ... | <p>The copy you checked in is a temporary copy. Since there are fines or holds pending on this copy, Circulation Desk cannot delete the temporary title or its copy. The temporary title and copy will be deleted when the fine or hold has been addressed.</p> <p>See also: For more information about temporary titles and their copies, see "Adding a title during a checkout" on page 139.</p> |
| Temporary ... deleted. You can now reuse barcode ... | <p>The copy you checked in is a temporary copy. Since there are no fines or holds pending on this copy, Circulation Desk deletes the temporary title and its copy.</p> <p>See also: For more information about temporary titles and their copies, see "Adding a title during a checkout" on page 139.</p> |
| This copy has been missing since ... | <p>The copy being checked in was not accounted for during the inventory for the specified year. The copy status changes from Missing to Available and the inventory status changes from Missing to Marked.</p> |
| This copy is on hold and should be placed on the hold shelf. | <p>This message appears when you try to check in a copy that is not checked out and has a copy status of On Hold. To find out who is waiting to retrieve the hold, you can switch to the Copy Status window and check the hold queue.</p> <p>See also: For more information about viewing the hold queue from the Copy Status window, see "Viewing the current status of a copy" on page 134.</p> |
| This copy of ... is on hold for: ... (Barcode: ...) | <p>This message appears when you check in a copy that fulfills a hold. You should place the copy on the hold shelf and send the patron a Hold Notice as soon as possible.</p> <p>See also: For more information about generating a Hold Notice, see "Generating Hold Notices" on page 553.</p> |
| This copy was at the bindery. | <p>The copy being checked in was at the bindery. Since you probably keep track of copies you send to the bindery, you should update your paperwork before you check in these copies. The copy status changes from At The Bindery to Available.</p> |

| Message | Cause |
|--|--|
| This copy was loaned out. Please update your records. | The copy being checked in was loaned out to another library. Since you probably keep track of copies you loan to other libraries, you should update your paperwork before you check in these copies. The copy status changes from Loaned Out to Available. |
| This copy was lost. | The copy being checked in was reported lost by a patron. The patron was probably charged a lost copy fine. A message may appear if a refund is generated. The copy status changes from Lost to Available. |

Chapter 11 Dealing with fines and lost copies

This chapter contains a brief explanation of the kinds of fines you can create in Circulation Desk and instructions for the following: recording payment for a single fine or for the total current fine balance; creating fines for damaged and overdue copies; editing fines; giving refunds; marking checked out copies lost and generating a fine for a lost copy.

Crime and punishment: the types of fines

Circulation Desk lets you create fines for your four default fine types as well as any user-defined fine types you have set up:

- Overdue fines are the most common and can be automatically generated during a checkin. When you set up your Follett applications, you can decide whether or not to have Circulation Desk automatically calculate overdue fines. Even if you don't enable automatic overdue fine calculation, you can still create damaged, lost, and overdue fines manually.

Note: The way overdue fines are calculated depends on how you selected your options in the Fines tab in System Setup. For more information about the fines option in System Setup, see "Activating automatic fine calculation and refunds" on page 81.

- Lost copy fines can be charged when a patron reports losing a copy. You must first mark the copy lost, then charge the patron for the copy. For more information about lost copy fines, see "Marking a patron's checkout lost" on page 161.
- Damaged copy fines can be charged when a returned copy shows signs of careless handling by the patron.
- Refunds can be tracked from the circulation desk. Refunds can be paid on a lost copy that has been found after the fine has been paid, for instance. For more information about lost copy fines, see "Marking a patron's checkout lost" on page 161.

Note: User-defined fine types are not associated to copy information.

You can switch to the Fines window from any other window at any time to take action on a patron's fines. If you have a sound card at your circulation desk, you can define a sound event in System Setup to alert you when you retrieve a patron who has fines or overdues.

The following shows the Fines window and describes its features:

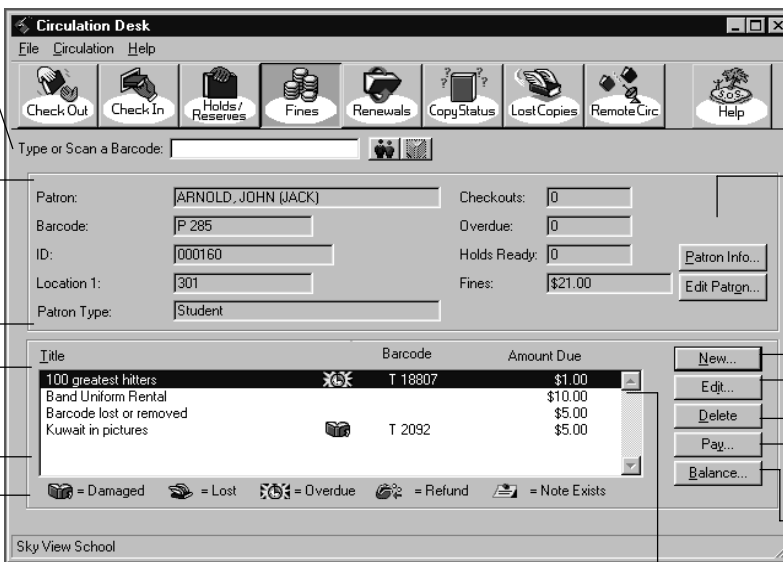
Scan or type the patron barcode.

An important message may appear. See "Important messages for patrons" on page 126. If enabled, the patron's picture displays.

Brief patron information appears in the patron information box.

All of the patron's current fines and refunds appear in the fines list. User-defined fine types will display a description instead of a title.

Use the legend to identify the type of fine charged to the patron and whether the fine contains a note. User-defined fines display no icon.



To print a receipt for the patron, choose Print Receipt. See "Receipt Printer (Transaction Tracker) setup and printing" on page 120 for more information.

To create a damaged, overdue, or user-defined fine

To edit the amount owed for the highlighted fine

To delete the highlighted fine

To record payment against the highlighted fine

To record payment against the balance of all fines, excluding refunds

A "CR" after the amount due also indicates that the patron is owed a refund.

Tracking fine payments

Except in the case of lost copy fines, Circulation Desk does not keep a history of a fine after it has been paid in full or deleted. Information about a lost copy fine is retained in the event that the copy returns. To keep a history of a patron's paid fines, you'll need to track fines some other way.

Whenever you create, edit, or apply payment to a fine or the fine balance, Circulation Desk lets you print a receipt with the patron's fine, payment, and balance to your workstation's default printer. Each 8.5" x 11" page contains two copies of the receipt, one for the patron and one for your records. The following shows a patron's receipt after applying payment to a fine balance (see page 157):

| Sky View School Library | | | | | | |
|---|---------------------------------|----------|----------|--------|---------|--|
| Receipt for paid fines (patron copy) | | | | | | |
| 10/13/2001 @ 3:10pm | | | | Page 1 | | |
| ----- | | | | | | |
| Receipt to John Arnold for the following: | | | | | | |
| BARCODE | TITLE | PREV BAL | AMT PAID | WAIVED | NEW BAL | |
| ----- | | | | | | |
| T 11971 | 100 greatest basketball players | \$10.95 | \$8.00 | \$2.95 | <paid> | |
| T 7845 | Barefoot book of giants, ghosts | \$5.00 | \$1.00 | \$0.00 | \$4.00 | |
| T 1302 | The glorious flight: across the | \$0.80 | \$0.80 | \$0.00 | <paid> | |
| | Band uniform rental | \$10.00 | \$0.00 | \$0.00 | \$10.00 | |
| ----- | | | | | | |
| TOTAL: | | \$26.75 | \$9.80 | \$2.95 | \$14.00 | |

For more information on printing fine receipts, see the following sections.

See also: For an example of a refund receipt, see page 161. For information about printing a patron's current fines, see page 130.

Recording payment against the fine balance

Tip: Since Circulation Desk doesn't deduct refunds from the total fine amount, apply any refunds to the individual fines before accepting payment on the remaining balance. For more information on applying refunds, see page 161.

If a patron wants to pay some or all of his/her fines, you can apply payment by choosing Balance in the Fines window. The Pay Balance dialog appears:



Type the amount of payment here. Do not enter an amount greater than the Amt Due.

Type the amount you want to waive, if any, here. Make sure that the total of the Payment and Waive amounts is not greater than the Amt Due.

To print a receipt for paid fines, select this option. When you click Save, the receipt prints at this workstation's default printer.

When you click Save, the Applying Payment progress dialog appears. Since you do not have to pay the entire balance, Circulation Desk applies payment to the oldest fines first and continues applying payments to each fine until the entire payment is used. When Circulation Desk finishes applying payment, you return to the Fines window. When a fine is paid in full, Circulation Desk deletes it from the patron's record. Any note associated with the fine is also deleted.

If you selected the Print Fine Receipt Upon Save option, a receipt prints to your workstation's default printer. Each 8.5" x 11" page contains two copies of the receipt, one for the patron and one for your records. For a sample of the patron's receipt, see page 156.

Recording payment for a single fine

To record payment for a single fine, select the fine the patron wants to pay from the list of fines in the Fines window and choose Pay. The Pay Fine dialog appears:



To print a receipt for the paid fine, select this option. When you click Save, the receipt prints at this workstation's default printer.

Type the amount of payment here. Do not enter an amount greater than the Amt Due.

Type the amount you want to waive, if any, here. Make sure that the total of the Payment and Waive amounts is not greater than the Amt Due.

Choose Save to update the patron's record. If the fine is paid in full, Circulation Desk deletes it from the patron's record. Any associated note is also deleted.

If the Print Fine Receipt Upon Save option is selected, a receipt prints to your workstation's default printer. Each 8.5" x 11" page contains two copies of the receipt, one for the patron and one for your records. For a sample of the patron's receipt, see page 156.

Creating fines



Circulation Desk allows you to create several types of fines manually from the Fines window. You can create new fines for the defaulted fine types of Overdue and Damaged. You can create fines for any user-defined fine types you have added from System Setup as well, but these fines types will not be associated with copy information. Remember, Circulation Desk can automatically generate overdue fines for you.

If you want to be alerted by sound when a copy that was checked in creates a fine, see the section on setting up alert sounds on page 88.

For information about creating lost copy fines, see the section titled "Marking a patron's checkout lost" later in this chapter. For information about changing your fines options, see "Activating automatic fine calculation and refunds" on page 81.

To create fines manually, choose New from the Fines window. The New Fine dialog appears:

To print a receipt for the fine, select this option. When you click Save, the receipt prints at this workstation's default printer.

Select the type of fine you want to create. Choose from the list.

Scan or type the barcode of the copy for which you want to create the fine. If you cannot scan the barcode, click Find to search for the copy.

If you are creating an overdue fine and want to record when the copy was due and when it was returned, enter the dates and times here. This information is not required.

A fully editable text box for any fine-specific notes

Type the amount you want to charge here.

If you want to apply payment or waive part of the fine at this time, enter the amounts here.

When you finish creating the fine, choose Save. If the Print Fine Receipt Upon Save option is selected, a receipt prints to your workstation's default printer. Each 8.5" × 11" page contains two copies of the receipt, one for the patron and one for your records. For a sample of the patron's receipt, see page 156.

Note: If you are creating an overdue fine, you cannot create the fine for more than the Fine Limit amount defined in the Policies tab in System Setup. You can exceed the Fine Limit for a damaged fine, but you must confirm that you want to do so. For information about setting the Fine Limit, see "How to limit loan periods" on page 78.

Note: You cannot create a fine for a copy with the Circulation Type of Non-circulating eBook (*NC).

Editing fines



After creating a fine, you can change the amount of the fine, the amount paid, or the amount waived.

To edit a fine, highlight the fine you want to edit from the list of fines in the Fines window and choose Edit. The Edit Fine dialog appears:

To print a receipt for the fine, select this option. When you click Save, the receipt prints at this workstation's default printer.

Type the corrected amounts in the Amount, Paid, or Waived text boxes.

The Amt Due is updated automatically.

When you finish editing the fine, choose Save. If the Amt Due is reduced to zero, Circulation Desk deletes the fine from the patron's record. If the Print Fine Receipt Upon Save option is selected, a receipt prints to your workstation's default printer. Each 8.5" x 11" page contains two copies of the receipt, one for the patron and one for your records. A sample of the patron's receipt is on page 156.

Note: If you are editing an overdue fine, you cannot charge a fine that is greater than the Fine Limit amount defined in the Policies tab in System Setup. You can exceed the Fine Limit for a damaged or lost fine, but you must confirm that you want to do so. For information about setting the Fine Limit, see "How to limit loan periods" on page 78.

Giving refunds

Circulation Desk only generates refunds in two situations:

- If a patron has reported a lost copy and has made payment on the lost copy fine, Circulation Desk generates a refund equaling the amount paid if the copy is checked in.
- If the Generate a refund when a partially paid fine is deleted check box on the Fines tab in System Setup is selected, Circulation Desk generates a refund for the amount already paid on a fine if it is deleted.



Before you give a patron a refund, however, check to see if the patron owes any fines. Refunds are not deducted from the total current fine amount. Therefore, if you are giving a patron a refund and if the patron has any outstanding fines, you should delete the refund and apply the refund amount as payment toward individual fines before giving the patron any money.

To give a patron a refund, highlight the refund, marked CR in the Fines window, and then choose Pay. Circulation Desk asks you to confirm this refund. If you choose Yes, the refund is deleted from the patron record. Refund is also available as a fine type from the Pay Fine and New Fine windows.

When you issue a refund, you're given the option to print a refund receipt. Click Yes to print a receipt to the workstation's default printer. Each 8.5" x 11" page contains two copies of the receipt, one for the patron and one for your records.

| Sunnydale Junior High Library | | |
|---|----------------|---------|
| Receipt for refund (patron copy) | | |
| 10/13/2000 @ 3:10pm | | Page 1 |
| ----- | | |
| Receipt to Adam Albers for the following: | | |
| BARCODE | TITLE | AMOUNT |
| ----- | ----- | ----- |
| T 1077 | Cats from away | \$12.56 |
| ----- | ----- | ----- |
| | TOTAL: | \$12.56 |

Marking a patron's checkout lost

When a patron reports losing one of the items he/she has checked out, you can mark the copy lost, and then decide whether or not to charge the patron for the copy. If you mark a copy lost, please note the following:

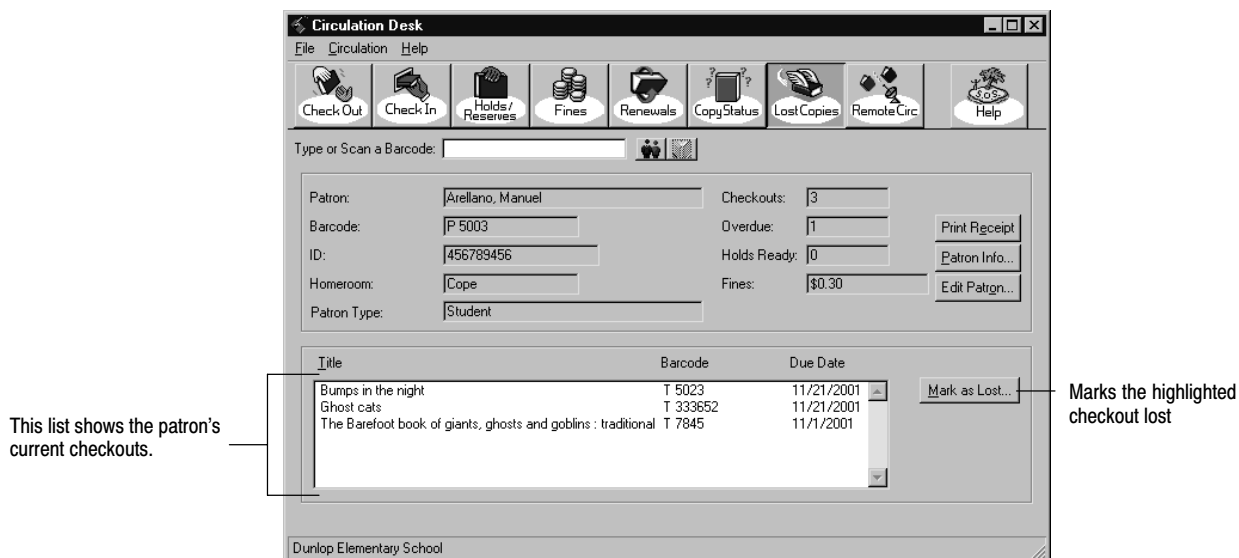
- If you mark a patron's checkout lost, Circulation Desk changes the copy status from Checked Out to Lost. However, the inventory status of a lost copy remains Marked because the copy is still checked out. Circulation Desk does not consider the copy to be missing because you know who had the copy checked out, and the item might return in the future. Lost copies,

therefore, do not show up as missing on an inventory report. For more information about copy status and inventory status, see “Overview of an Inventory” on page 209.

- If you mark a patron’s checkout Lost, and the copy is checked in later, Circulation Desk automatically generates a refund for the amount paid for the lost copy fine. A message appears when the copy is checked in alerting you that Circulation Desk is generating a refund for a lost copy. If the patron has not made any payment on the lost copy fine, then the fine is just deleted. The copy status changes to Available.

Note: You cannot mark a copy Lost without knowing who has checked it out. If a copy shows up as available in the system but cannot be found in your library, you can change the inventory status to Missing in Cataloging. Once this change is saved, the copy status will change to Missing.

To mark a patron’s checkout Lost, select Lost Copies from the toolbar:



When you choose Mark as Lost, a message appears asking you to confirm that you want to mark the copy Lost. Choose Yes. Another message appears asking you if you want to create a fine for the patron who lost the copy. If you choose No, you return to the Lost Copies window. If you choose Yes, continue with the next section, “Charging a fine for the lost copy.”

See also: For more information about printing a list of lost copies, see “Generating a Copy List by Status” on page 551. To globally delete lost copies from your database, see page 330.

Charging a fine for the lost copy

While marking a copy lost, if you choose to create a fine for a lost copy, the New Fine dialog appears:

To print a receipt for the fine, select this option. When you click Save, the receipt prints at this workstation's default printer.

The amount in the Amount text box normally comes from the copy information or the Fine Limit. See the following note for more information.

If you want to apply payment or waive part of the fine at this time, enter the amounts here.

The Amt Due is updated automatically.

Note: The amount in the Amount text box normally comes from the copy information. The Fine Limit—defined in the Policies tab in System Setup—appears in the Amount text box if: 1) there is no price defined for the copy in the copy information, and 2) the Use Fine Limit if the copy price has not been entered check box in the Fines tab in System Setup is selected. If both the copy price and the Fine Limit are undefined, you must manually enter the amount of the lost copy fine.

When you finish creating the lost copy fine, choose Save. If the Print Fine Receipt Upon Save option is selected, a receipt prints to your workstation's default printer. Each 8.5" x 11" page contains two copies of the receipt, one for the patron and one for your records. For a sample of the patron's receipt, see page 156.

Troubleshooting

If you want to disable the automatic fine calculation, or change the way fines are calculated, see “Activating automatic fine calculation and refunds” on page 81.

The following table lists some error messages that might appear while creating, editing, or paying fines:

Error messages associated with fines

| Message | Cause |
|--|--|
| Amounts waived and/or paid cannot exceed the amount of the fine. | This message appears if the total of the Waived and Paid text boxes exceeds the Amount text box. Even if the patron gives you more money than the Amount, you cannot enter that value here because Circulation Desk does not keep track of change due. |
| The fine amount cannot be zero. | You cannot create a fine of \$0.00. To cancel creation of a fine, choose Cancel. |
| The fines for this patron have been altered since you began applying payment. Please re-view this patron's fines and try again. | This message might appear while applying payment toward a patron's fine balance and indicates that the patron's fines have changed since you began applying payment. This can only happen in a multiuser environment when the patron is being edited at two different Circulation Desk workstations. |
| Temporary . . . deleted. You can now reuse barcode . . . | This message appears if a fine on a temporary copy is paid in full or deleted. The temporary title and its copy are deleted from your collection. |

Chapter 12 Managing holds

This chapter contains instructions for placing holds and reserves, managing and editing holds and reserves, and interpreting the Daily Holds Processing exception report. Circulation Desk allows you to place holds and reserves for patrons; OPAC allows patrons to place holds and reserves for themselves.

See also: For more information on allowing patrons to place their own holds and reserves, see page 74 to set up Patron Empowerment and page 472 to use it.

A brief introduction to holds

Circulation Desk allows you to place a hold for a patron on any copy or a specific copy. The following scenarios provide examples for the use of a hold:

A patron wants a certain copy and goes to the OPAC only to discover that the copy isn't available. His library has enabled Patron Empowerment so he logs on and places a hold for the copy he wants. During his next library period, he logs on and checks his Patron Information to see if his hold has become ready.

Another patron calls or sends an e-mail message about a particular title. A copy is available, but the patron can't get to the library until tomorrow afternoon. To ensure that the patron gets the item he wants, you create a hold for him. The next day, the patron retrieves the copy.

Placing a hold on a copy that is checked out, at the bindery, or loaned out, results in a pending hold. Placing a hold on an available copy results in a ready hold.

You cannot place a hold, however, on copies that are already checked out or on hold to that patron, or that are missing or lost, or have a circulation type of *NC.

When you check in a copy with a pending hold, the hold status changes to ready and Circulation Desk alerts you about the hold. This allows you to place the copy on the hold shelf so that it won't be reshelfed. You can then tell the patron that the hold is ready. You can print Ready Hold Notices in the Reports module.

If you want to be alerted by sound when a copy that was checked in readies a hold or reserve, see the section on setting up alert sounds on page 88.

Holds can also become ready during the Daily Holds Processing when you start Circulation Desk at the beginning of the day. When this happens, a message on the Daily Holds Processing exception report informs you that the hold is ready.

If the patron does not retrieve the copy in the time allotted, the ready hold expires. If a certain item is popular, a pending hold can expire before a copy

becomes available. Circulation Desk allows you to extend the expiration date of a hold at any time.

A brief introduction to reserves

Circulation Desk allows you to place a reserve for a patron. A reserve is basically a hold for a specific copy for a specific future date. The following scenarios provide examples for the use of a reserve:

A student wants to have a certain book for a class presentation two weeks from now. Her library has enabled Patron Empowerment so she logs on to her OPAC, locates the item, and places a reserve for the copy she wants. Two weeks later, she returns to pick up the copy.

Another patron, a faculty member, would like you to set aside several books he needs for his lesson plan in two months. To ensure that the teacher gets the items he wants, you create reserves for him. Two months later, the teacher retrieves the copies that have circulated in the interim.

You can place a reserve on copies that are available, on hold, checked out, at the bindery, or loaned out. You cannot place a reserve on copies that are missing, lost or temporary, or have a circulation type of *NC. You can place a reserve for any date in the future that the library is open.

When reserving an item, you specify a copy and the date that the patron wants the item. The copy is then reserved for the length of the loan period. Note that the shortest reserve period is one day; items with an hourly loan period would use this minimum reserve period.

Example: If a patron reserves an item for March 18th, and the loan period is 10 days (2 weeks), the reserve period is March 18–April 1.

Readying reserves

To ensure that the reserved item is ready for pickup, you select, in System Setup | Setup | Circulation | Holds, the number of pre-reserve processing days that you need. If you set it to, say **2**, then two days before a reserve date, Circulation Desk performs the following actions:

- The Daily Holds Processing changes the hold status of the reserved item to Pending. After further processing, if the item is available, the hold status changes to Ready and its copy status becomes On Hold.
- The Daily Holds Processing exception report lists the reserved items that are processed each day. You have those two days to locate the copies, place them on the hold shelf, and remind the patrons to pick them up. For more information, see “Interpreting the Daily Holds Processing exception report” on page 171.

Circulating reserves

Because the copy status of a reserved item does not change until the processing date, it is available for circulation until then. If another patron checks out a

reserved item, and the normal loan period would overlap the reserve period, Circulation Desk automatically shortens the loan period so that the item is due the day before the processing date. In addition, Circulation Desk does not allow another patron to place a reserve on the same item for a date that is within the existing reserve period. These measures help to ensure that the reserving patron receives their copy when needed.

If the reserving patron retrieves the item before the processing date, you need to delete the reserve before checking out the item. This avoids any loan-period shortening intended to protect the reserve.

If the patron does not retrieve the reserved copy in the time allotted, the reserve automatically expires the day after the end of the reserve period. Circulation Desk does not allow you to revive a reserve. Because the reserve is for a specific date, and that date has passed, Circulation Desk assumes the patron no longer needs the item.

Additionally, you cannot change the priority of a reserve. In the queue, a reserve always has priority over a hold.

See also: Define the number of pre-reserve processing days that you need in System Setup | Setup | Circulation | Holds. For more information, see page 79. Generate a pick list for upcoming reserves with the Hold Transactions Report sorted by call number (see page 557).

Getting around the Holds/Reserves window

The Holds/Reserves window shows a list of the current patron's holds and reserves. The following shows an example of the Holds/Reserves window for a patron who has a reserve, a ready hold, a pending hold, and an expired hold:

The screenshot shows the 'Circulation Desk' window with the 'Holds/Reserves' tab selected. The window displays the following information:

Patron Information:

- Patron: DeLeon, Jeffrey Allen
- Barcode: P 2858
- ID: [Empty]
- Homeroom: Maroney
- Patron Type: Student
- Checkouts: 2
- Overdue: 1
- Holds Ready: 1
- Fines: \$2.56

Hold/Reserve List:

| Title | Placed On | Expires | Status |
|--|-----------|------------|----------|
| Alpha Centauri, the nearest star | Copy | 10/22/2001 | Expired |
| Project Apollo | Any | 11/21/2001 | Ready |
| Project Mercury | Copy | 1/30/2002 | Pending |
| The ultimate guide to the sky : how to find co | Copy | 12/27/2001 | Reserved |

Annotations:

- The patron information box:** Points to the fields for Patron, Barcode, ID, Homeroom, and Patron Type.
- The patron's current holds and reserves, arranged alphabetically by title:** Points to the table listing holds and reserves.
- The number of ready holds and reserves waiting to be picked up appears in the patron information box each time you retrieve the patron:** Points to the 'Holds Ready: 1' field.
- To place a hold or reserve for the current patron:** Points to the 'New...' button.
- To edit the expiration date or priority of a hold or to view a reserve:** Points to the 'View/Edit...' button.
- To delete the highlighted hold or reserve:** Points to the 'Delete' button.
- To view the Hold Queue:** Points to the 'Holds/Reserves...' button.

Footer: Dunlop Elementary School

Legend:

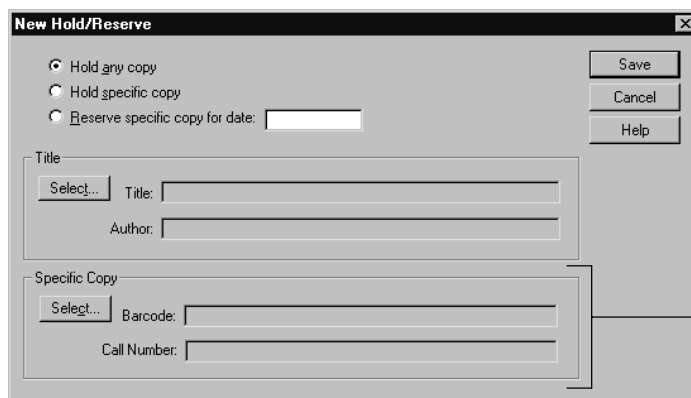
- A hold can be placed on the first available copy (Any) or on a specific copy (Copy). A reserve is for a specific copy only.
- The expiration date
- The current status

You can view the status of a hold or reserve from the Holds/Reserves window or the Hold Queue. The queue lists all the patrons waiting to receive a copy of an item. You can get to the Hold Queue from either the Holds/Reserves window or the Copy Status window (see page 134) by clicking Holds/Reserves.

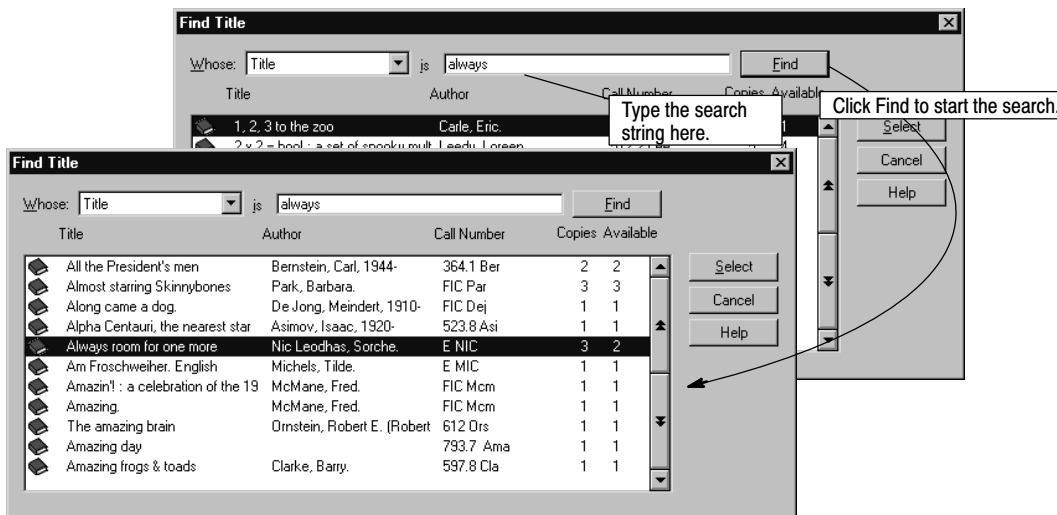
Placing a hold or reserve for a patron

To place a hold or reserve for a patron, follow these steps:

1. In the Holds/Reserves window, click New. The New Hold/Reserve dialog appears:

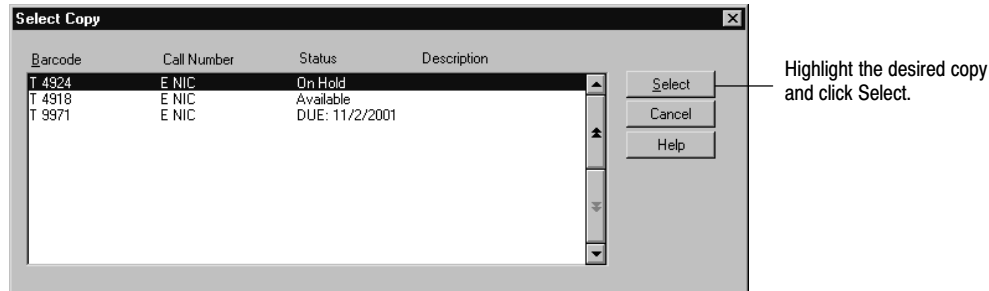


2. To select the type of hold or reserve, click the appropriate radio button. For a reserve, enter the date that the patron needs the item.
3. To select the title on which to place the hold, click the Select button under Title. The Find Title dialog appears:



4. After locating the title, highlight it and click Select. If you are placing a hold on the first available (any) copy, click Save on the New Hold/Reserve dialog.

- To place a hold on a specific copy or to reserve it for a future date, click the Select button under Specific Copy. The Select Copy dialog appears. Highlight the desired copy, and click Select.



- To create the hold or reserve, click Save. A message appears informing you of the hold or reserve's expiration date. For a hold, the message includes its position in the queue. A reserve is always at the top of the queue.

When a copy that fulfills a pending hold is checked in, Circulation Desk alerts you to place the copy on the hold shelf. When the processing date for a reserve arrives, the Daily Holds Processing exception report lists the reserved items so that you can retrieve them and place them on the hold shelf.

See also: For information about placing holds and reserves in OPAC, see page 473.

Managing holds

Circulation Desk allows you to edit the expiration date of a hold. You can also move a hold up or down in the queue by changing its priority.

Circulation Desk does not allow you to revive a reserve by editing its expiration date. Because the reserve is for a specific date, and that date has passed, Circulation Desk assumes that the patron no longer needs the item. In addition, Circulation Desk does not allow you to change the priority of a reserve. Once the pre-reserve processing date arrives, a reserve has priority over any hold. You can, of course, delete a reserve and create a new one.

Extending the life of a hold

The most common reason to extend the expiration date of a hold is that the hold has expired and you want to make it pending again.

When an expired hold becomes pending again, Circulation Desk assigns it a new position in the Hold Queue. The new position is based upon the hold's priority at the time it expired and the date that the hold was placed originally, not the date that the hold becomes pending again.

To extend the expiration date of a hold, from the Holds/Reserves window (see page 167), highlight the hold and click View/Edit. The Edit Hold dialog appears:

Enter the new expiration date, and click Save.

Note: If the hold expired and copies are now available, a message appears asking you to confirm that you want to revive the hold.

The priority helps control placement of a hold in the hold queue.

Even if the copy is available when an expired hold is made pending, the hold will not become ready until you start Circulation Desk the next day. The holds that have been made ready will be listed on the Daily Holds Processing exception report. For more information, see “Interpreting the Daily Holds Processing exception report” on page 171.

See also: Define your hold expiration settings for each patron type in System Setup | Setup | Circulation | Holds. For more information, see “Setting time limits for items on hold” on page 78.

Changing the priority of a hold

The Hold Queue lists all the patrons waiting to receive a copy of a specified title. You can open the queue from either the Holds/Reserves or Copy Status window.

From the Holds/Reserves window (see page 167), highlight the desired title and click the Holds/Reserves button. From the Copy Status window (see page 134), scan or select the copy, and click the Holds/Reserves button. The Hold Queue dialog appears:

The lower the number, the higher the position in the queue. Reserves are always at the top.

| Patron | Placed On | Priority | Expires | Status |
|-----------------|-----------|----------|------------|-------------------------------|
| Yamamoto, Colin | Copy | N/A | 12/14/2001 | Reserved 12/6/2001-12/13/2001 |
| Ancrum, Lee | Copy | 10 | 9/26/2001 | Ready |
| Santiago, Joyce | Any | 10 | 10/25/2001 | Pending |
| Garvey, Malcolm | Copy | 50 | 10/25/2001 | Pending |

To edit the priority or expiration date of a hold, or to view a reserve, click View/Edit.

The date range of a reserve is the normal loan period for that item.

A hold can be placed on any available copy or on a specific copy.
A reserve must be on a specific copy.

The expiration date

The current status: reserved, expired, ready, or pending

The queue is sorted as follows: Reserves are always at the top, in order of reserve date. Below reserves are the holds, sorted by status: expired holds first, ready

holds second, and pending holds last. Holds with the same status are sorted in ascending order according to priority and the date placed. The lower the priority value, the higher the hold's position is in the queue.

To change the priority of a patron's hold, highlight the hold that you want to edit and click View/Edit. The Edit Hold dialog appears:

The screenshot shows a dialog box titled "Edit Hold" with a close button (X) in the top right corner. The dialog contains several input fields and three buttons. The fields are: Patron (Garvey, Malcolm), Title (The Delaware Colony), Author (Fradin, Dennis B.), Barcode (33976000648834), Call Number (975.1 FRA), Expires (10/25/2001), and Priority (50). The buttons are Save, Cancel, and Help.

Type the new priority value, and click Save. A message appears informing you of the hold's new position in the queue.

If you move a hold to the top of the pending holds by changing its priority, it will be the next hold made ready. However, you cannot change a hold's status. Circulation Desk changes the status from pending to ready when a copy becomes available. To change an expired hold's status to pending, you must edit its expiration date. See "Extending the life of a hold" on page 169.

See also: Define the default priority for each patron type in System Setup | Setup | Circulation | Policies. For more information, see "How to set circulation limits for patron types" on page 77.

Interpreting the Daily Holds Processing exception report

Circulation Desk processes holds and reserves the first time you start Circulation Desk on a given date if there are any holds or reserves in the system. As Circulation Desk processes them, it sends information about any actions it takes to the Daily Holds Processing exception report. This report is available by opening the Exception Report folder within your Follett folder. Although most hold situations are addressed as they occur throughout the day, Circulation Desk processes holds and reserves on a daily basis for the following reasons:

- When the pre-reserve processing date arrives for a reserve, Circulation Desk must notify you so that you can retrieve the reserved item and place it on the hold shelf.
- If you chose, in System Setup, to delete expired holds and reserves automatically, Circulation Desk does so during the Daily Holds Processing.
- When copies are added or imported, they may fulfill a pending any-copy hold. Circulation Desk looks at all copies in your collection during the Daily Holds Processing to see if there are any new copies that might have become available to fulfill a pending hold. This might also happen if a Missing or Lost copy is returned.
- In the rare event that all the copies for a title were deleted, Circulation Desk must delete any holds or reserves for that item during the Daily Holds Processing. If there are no copies, Circulation Desk cannot fulfill a hold.

The Daily Holds Processing exception report will help you maintain your ready hold shelf and keep patrons informed of the status of their holds.

Note: If you are unfamiliar with the terms "Ready," "Pending," and "Expired," please refer to the first sections in this chapter, starting on page 165.

The following is an example of the Daily Holds Processing exception report:

```

Daily Holds Processing

10/13/2001 @ 10:09am

Reserves Processed:
-----
PENDING:   A reserve for Lee Ancrum, Barcode # 43, on "Babe Ruth",
           barcode # T 564472, has been processed. A hold for the
           item has been created and should be readied in the
           "Pending Holds Readied:" section below.

Pending Holds Expired:
-----
EXPIRE:   The pending hold for Eric Michael Ramus, barcode # P 6, on
           "Arabic", has expired.

Ready Holds Expired:
-----
EXPIRE:   The ready hold for Gwynneth Fraser, barcode # P 7, on
           "Coyote : a trickster tale from the American Southwest",
           barcode # T 915234, has expired.

EXPIRE:   The ready hold for Robert Adam Green, barcode # P 5, on
           "Karate", barcode # T 22779, has expired.

Pending Holds Readied:
-----
READY     The pending hold for Lee Ancrum, Barcode # 43, on "Babe
           Ruth", barcode # T 564472, has been readied. Please notify
           the patron.

Daily holds processing has completed. To generate a more complete
listing of your holds or reserves, open the Circulation Reports tab in
the Reports module and highlight Hold Transactions. You can specify
holds and/or reserves, and limit it to those that are reserved,
pending, ready, or expired.

Reserves Processed:      1
Illegal Holds Deleted:   0
Pending Holds Expired:  1
  Ready Holds Expired:   2
Expired Holds Deleted:   0
Pending Holds Readied:   1
  Failures:              0
Total Holds:            29

```

The exception report is divided into sections that show what action Circulation Desk has taken on the holds and reserves. The following table describes the cause of each message and gives recommended actions:

Follow-up for the Daily Holds Processing exception report

| Holds processing section | Cause |
|---------------------------------|---|
| Illegal Holds Deleted | Circulation Desk rarely encounters illegal hold situations. As an example, if you place a hold and then delete all of the copies of an item, Circulation Desk can never fulfill the hold. This can also occur if all of the copies of a title are marked Lost or Missing after a hold is placed. |
| Reserves Processed | Circulation Desk processes a reserve on the pre-reserve processing date (selected in System Setup). It temporarily sets the hold status to pending. If the copy is available, the report also lists the copy under Pending Holds Readied (see below). |
| Pending Holds Expired | Circulation Desk expires a pending hold or reserve if the current date is beyond its expiration. Since an expired hold is never made ready, you can extend the expiration date, making it pending again. You cannot extend the expiration date of a reserve. If expired holds and reserves are not automatically deleted, you need to delete them manually. |
| Ready Holds Expired | Circulation Desk expires a ready hold or reserve if the current date is beyond its expiration date. Since the patron did not retrieve the ready hold, you can extend the expiration date, making it ready again. You cannot extend the expiration date of a reserve. If expired holds and reserves are not automatically deleted, you need to delete them manually. |
| Expired Holds Deleted | If you chose, in System Setup, to delete expired holds and reserves automatically, Circulation Desk does so, after the specified number of days, during the Daily Holds Processing. If you chose not to delete them automatically, they remain in the system until you manually delete them. See also: For more information about deleting expired holds and reserves automatically, see "Setting time limits for items on hold" on page 78. |
| Pending Holds Readied | If a copy becomes available to fulfill a pending hold, Circulation Desk makes the hold ready and changes the copy status to On Hold. If a reserved copy is available, and the processing date is today, Circulation Desk makes the reserve ready and changes the copy status to On Hold. When a hold or reserve is readied, inform the patron as soon as possible so that the hold (or reserve) does not expire before the patron retrieves it. You may also need to retrieve the copy that fulfills the hold or reserve from your shelves. |

Troubleshooting

The following table lists messages that might appear while creating, editing, deleting, or managing your holds and reserves:

Hold and reserve error messages

| Message | Cause |
|---|--|
| <p>All copies are lost, missing, or are Non-circulating eBooks — a hold cannot be placed.</p> <p>There are no holdable copies available to this patron.</p> | <p>There are no holdable copies available. For a copy to be holdable, the copy status must be Available, Checked out, At The Bindery, Loaned out, or On Hold. Copies with a circulation type of Non-circulating eBook (*NC) are not holdable.</p> |
| <p>Holds/reserves limit reached.</p> | <p>The patron's number of pending holds, ready holds, and reserves is greater than or equal to the value you defined in System Setup Setup Circulation Policies Max Holds/Reserves.</p> |
| <p>Patron has a copy checked out — hold cannot be placed.</p> | <p>A patron is not allowed to place a hold on an item if he already has a copy of the same title checked out.</p> |
| <p>Patron already has a copy hold — hold cannot be placed.</p> <p>Patron already has a hold on this copy — hold cannot be placed.</p> <p>Patron already has a hold on this title — hold cannot be placed.</p> <p>There are no holdable copies available to this patron.</p> | <p>In all of these cases, the patron cannot place the hold because she already has a hold on the same item or one of its copies. A patron is only allowed one hold per title.</p> |
| <p>Temporary . . . deleted. You can now reuse barcode # . . .</p> | <p>If you delete a hold that was on a temporary copy, this message appears if no other transactions are pending on the copy. The temporary title and its copy are deleted from your collection.</p> |
| <p>Temporary . . . cannot be deleted because there is a fine on it, or there is a hold. Do not reuse barcode # . . .</p> | <p>If you delete a hold that was on a temporary copy, this message appears if there are transactions pending on the copy. You are advised not to reuse the barcode. When the pending transactions have been addressed, a message appears informing you that you can reuse the barcode.</p> |
| <p>There are no copies available for the reservation period.</p> | <p>You have attempted to reserve a copy that is checked out and has a due date later than the selected reserve date, or the selected reserve date conflicts with an existing reserve on the copy, or the copy is a temporary copy.</p> |

Chapter 13 Circulating items with a PHD

This chapter starts with a brief explanation of why you would want to use a PHD to circulate your collection and some suggestions regarding what to do before you start. After that you'll find instructions for processing your remote circulation data and for interpreting the resulting exception report.

Note: The term "PHD" is a generic term for all of the portable hand-held devices sold by the Follett Software Company: the PHD+, PHD+II, PHD Laser+, and the PHD Dolphin+.

Why use a PHD to circulate your collection

In addition to being a valuable tool during an inventory, you can also use a PHD to circulate your collection. This is called remote circulation because you can record checkins, checkouts, and renewals outside your library or resource center using a PHD.

When you use a PHD to circulate, you do not see any block conditions or error messages as you would when circulating using Circulation Desk. Since your PHD does not contain your patron records or your circulation policies, it won't warn you when a patron is violating a circulation policy.

For this reason, we recommend that you transfer the transaction data you collect with your PHD as soon as you return to your Circulation Desk workstation. Circulation Desk generates an exception report that alerts you to any situations where a patron has violated your library's circulation policies.

Here are some suggested situations for using a PHD to circulate copies:

- If you have a bookmobile, take a PHD with you on your rounds.
- Take part of your collection on a book cart to a classroom.
- Use a PHD to record transactions in the event that Circulation Desk is unavailable.
- Use a PHD to record the in-library usage of items not checked out before you reshelve them.

Before recording transactions with a PHD

Because your PHD does not store information about your patrons, if you use it to circulate your collection, transactions that would normally produce block conditions continue as if the patron had violated none of your loan policies. You can help reduce the size of the Remote Circulation exception report by printing the following reports from Reports and using them to monitor transactions before you record them with your PHD:

- Patron Name List — You should print two of these: one that shows patrons that have a status of restricted, and one that shows patrons that have graduated or are inactive. You probably do not want to check out or renew any copies to restricted patrons. It is also unlikely that you want to circulate items to patrons who have graduated. For more information, see page 575.
- Checkouts/Fines Transactions — This report is sorted according to patron name and shows every overdue and fine each patron currently has. Using this report to monitor patrons as they check out and renew copies is the equivalent of the block conditions that would normally appear in Circulation Desk during a transaction. For more information, see page 540.

Recording transactions with a PHD

Follett Software currently supports four PHD models. For instructions on recording transactions with the PHD+, PHD+ II, or PHD Laser+, see “Recording remote circulations” on page 661. To record transactions with a PHD Dolphin+, see “Collecting circulation information” on page 674. When you finish collecting transactions, connect your PHD to your computer.

See also: For more information about using your PHD, please see the manufacturer’s user documentation as well as Appendix E, “Using a PHD+, PHD+ II, or PHD Laser+,” or Appendix F, “Using a PHD Dolphin+.”

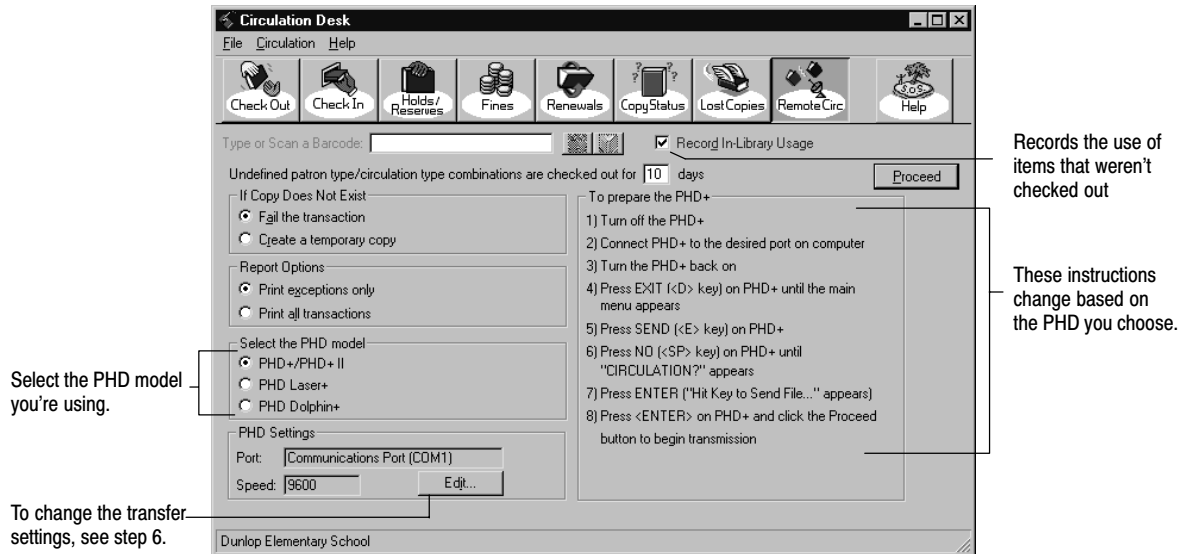
Processing remote circulation transactions

Before Circulation Desk can process your scans, you must decide how to process problematic transactions.

An example of a problematic transaction would be a checkout where either the patron barcode or the copy barcode does not exist in your database. Anytime Circulation Desk encounters a problem while processing the remote circulation data, it sends a message to the exception report. The above example would also cause the transaction to fail.

To make sure that the scans you collect with your PHD are processed the way you want, follow these steps:

1. From the toolbar in the Circulation Desk window, select Remote Circ. The Remote Circulation window appears:



2. Select the Record In-Library Usage option to include the use of any items not checked out but not on the shelves in your circulation statistics.

See also: You can also collect circulation statistics for all the items in your library that get used, even if they aren't checked out, when you check them in from the Check In window. See "Reshelving items" on page 152.

3. The circulation type/patron type combinations represent the circulation policies defined in System Setup. For each patron type, you define a loan period for each circulation type. If you have many patron types and many circulation types, you might not have defined all of the combinations. In cases where Circulation Desk cannot find a defined loan period, it uses the number of days you enter in the Remote Circulation window as the loan period. To avoid this situation, check your policies in System Setup to make sure that all loan periods are defined for each patron type before transferring the scans. For information about setting up your loan periods, see "Circulation policies: who can have what and for how long" on page 76.

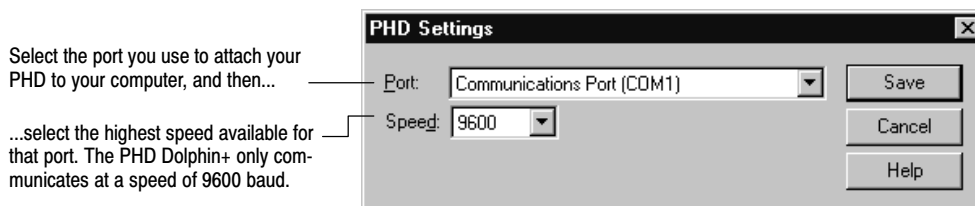
Important: If an undefined patron type/circulation type combination is encountered during processing, Circulation Desk defines the policies for this combination. It sets the fine limit at \$25.00 and the fine increment at \$0.10 for this patron type/circulation type combination. It sets all other maximum limits to zero.

4. Under If Copy Does Not Exist, choose how you want to handle nonexistent copies:
 - To fail all transactions involving copies not found in the database, choose Fail the transaction.

- To create a temporary title record and copy for each copy not found in the database during processing, choose Create a temporary copy.

Note: All temporary title records created during remote circulation data processing have the title: “Temporary created by Remote Circ on MM/DD/YYYY,” where the date is the date on which you transfer the data from your PHD to a workstation. Each time a copy cannot be found, a temporary title and copy are created with identical title information. For more information about temporary copies, see “Adding a title during a checkout” on page 139.

5. Under Report Options, choose an option for presenting the remote circulation data in the exception report.
 - If you want the exception report to contain only those transactions that produced exceptions, or caused problems during processing and require follow-up, choose Print exceptions only.
 - If you want the exception report to contain every transaction that occurred, choose Print all transactions.
6. Select the PHD model you’re using. If you do not want to change the transfer settings, skip to step 7. Otherwise, choose Edit. The PHD Settings dialog appears:



Set the port and speed for your PHD, and click Save. You return to the Remote Circulation window.

7. Once you’ve selected the correct PHD model and adjusted the PHD settings as desired, simply follow the instructions displayed on the dialog.

Once the scans are transferred, the Remote Circulation Processing progress dialog appears. When processing is complete, click Close. A message appears asking if you want to view the exception report. Choose Yes. A report viewer window appears containing the Remote Circulation Processing exception report. Make sure you save or print the exception report. When you are finished, select File | Exit. The Remote Circulation window reappears. After you are finished processing the remote circulation data, you can erase the scans.

See also: For instructions on erasing scans from a PHD+, PHD+ II, or PHD Laser+, see page 664. To erase them from a PHD Dolphin+, see page 679.

Interpreting the Remote Circulation Processing exception report

If there were any exceptions encountered during processing, the Remote Circulation Processing exception report appears in the report viewer. The following shows how the beginning of this exception report might appear:

Remote Circulation Processing

10/13/2000 @ 3:20pm

Alicia Hicks (Barcode: P 12), performed the following transactions:
 SUCCESSFUL: "Charlotte's web", Barcode # T 34523 was renewed for the patron.
 This copy was overdue. A fine of \$2.00 was assessed.
 SUCCESSFUL: "Debussy; musician of France", Barcode # T 43297 was checked out to the patron.
 Patron checkout limit was exceeded.
 SUCCESSFUL: "The magician's nephew", Barcode # T 62659 was checked out to the patron.
 Patron checkout limit was exceeded.

This copy was not checked out - No patron information:
 FAILED: "Mozart", barcode # T 9170 could not be checked in.
 This copy cannot be checked in. It has not been checked out.

Dana Mulder (Barcode: P 20), performed the following transactions:
 SUCCESSFUL: "Matilda", barcode # T 887769, was checked in for the patron.
 This copy was overdue. A fine of \$3.00 was assessed.
 This copy is now on hold for Daneille White (Barcode: P 35)

Patron information always appears above transaction information.

A block condition message can appear after each transaction after a policy has been violated.

Each transaction is classified as either SUCCESSFUL or FAILED.

The Remote Circulation exception report always ends with a summary, such as the following:

| Remote Circulation Summary | |
|----------------------------|--------------------------|
| Total transactions..... 6 | Titles checked out.... 2 |
| | Titles checked in.... 1 |
| | Titles renewed..... 1 |
| | Failed transactions... 2 |
| Holdings made ready..... 1 | Fines assessed..... 2 |
| | Total fines..... 5.00 |
| | Refunds created..... 0 |
| | Total refunds..... 0.00 |

The transaction information on the exception report is always presented in the same way: patron information followed by any conditions that apply to the patron, then transaction information, including its success or failure, followed by any conditions that apply to the transaction.

This exception report resides in the Exception Report folder within your Follett Applications folder.

The word FAILED or SUCCESSFUL appears to the left of the transaction information. A successful transaction is just that: a checkout, renewal, or check-in for which both the copy barcode and the patron barcode are found in your database. A transaction fails if either or both of these are unknown.

The following table lists the remote circulation exception messages that may require follow-up:

| Message | Cause |
|---|--|
| Ceiling date used (MM/DD/YY). | The ceiling date was used to determine the due date for this copy. |
| Circulation type checkout limit reached. | The patron checked out an item when their number of checkouts for a specific Circ Type is already at the maximum limit set in System Setup. |
| Copy barcode is invalid. | <p>The symbology of the copy barcode you scanned does not match the symbology defined for your library materials in System Setup.</p> <p>If you are certain that the patron barcode scanned is valid, try contacting the patron to ask what she checked out or checked in.</p> |
| Copy barcode was not found. | <p>The symbology of the copy barcode you scanned matches the symbology you defined for your library materials in System Setup, but the barcode does not correspond to a copy in your database.</p> <p>This message only appears if you selected the "Fail the transaction" option in Remote Circulation window (see page 177). It appears after the failed checkin or a checkout. Review the transactions that precede or follow this transaction and try to verify that the copy exists in your collection.</p> |
| This copy is now on hold for . . . | <p>The copy that was checked in satisfies a pending hold or reserve. The copy status changes from checked out to on hold. Put the copy on the hold shelf and send the patron a Hold Notice.</p> <p>See also: For information about Hold Notices, see "Generating Hold Notices" on page 553.</p> |
| This copy is on hold and should be placed on the hold shelf. | The copy being checked in is already a ready hold for someone else. Nothing is done with the circulation counts. |
| This copy is on reserve for <reserve date> by <patron>. The due date is past the requested reserve date. | The copy that was checked out had a reserve placed on it for a date within the current checkout's circulation period. You may want to retrieve the copy or notify the reserving patron of its unavailability. |
| This copy was at the bindery. | A copy that was at the bindery has been checked in. The copy status changes from at the bindery to available. If you keep records on copies that you have sent to the bindery, make sure to update them. |
| The copy was loaned out. Please update your records. | A copy that was on loan to another library has been checked in. The copy status changes from on loan to available. If you keep records on copies loaned out to other institutions, make sure you update them. |

| Message | Cause |
|---|--|
| This copy was on hold for . . . The hold status has been changed to “pending” and will become “ready” again at a later date. | <p>The copy that was checked out was a pending hold for another patron. You might want to extend the expiration date of the hold to make sure that it does not expire before becoming ready.</p> <p>See also: For more information about extending holds, see “Extending the life of a hold” on page 169.</p> |
| This copy was overdue. A fine of \$. . . was assessed. | <p>The patron that checked in or renewed this copy now owes a fine for an overdue copy. Be sure to generate an Overdue/Bill Notice.</p> <p>See also: For information about the Overdue/Bill Notices Report, see “Generating Overdue/Bill Notices” on page 561.</p> |
| Library hours are not set up; cannot calculate due date. | <p>This message indicates that there are no hours of operation defined in the Hours tab in System Setup. Since Circulation Desk cannot calculate due dates for checkouts and renewals unless the library hours are defined, items will be due at the beginning of the next open day.</p> <p>Be sure to set up your hours in the Hours tab in System Setup before circulating with your PHD again.</p> <p>See also: For information about setting up library hours, see “Setting your library’s hours” on page 85.</p> |
| No copies for this patron. | <p>This message usually indicates that two patron barcodes were scanned consecutively during a checkout, or that a patron barcode was scanned and then your PHD was switched to Check-in. Follow-up isn’t required unless you know the patron checked out a copy.</p> |
| Patron barcode/ID was not found—items will be marked Missing. | <p>The symbology of the patron barcode matches your barcode setup, but the barcode does not correspond to a patron in your database. Circulation Desk changes the copy and inventory statuses of the copies checked out to this patron to Missing.</p> <p>Keep a list of the copy barcodes, and if possible, try to follow up as soon as possible with the patron to see if there is a problem with the barcode on her library card.</p> |
| Patron barcode was invalid—items will be marked Missing. | <p>The symbology of the patron barcode you scanned with your PHD does not match the symbology defined for your patrons in System Setup. Circulation Desk changes the copy and inventory statuses of the copies checked out to this patron to Missing.</p> <p>Keep a list of the copy barcodes, and if possible, try to follow up as soon as possible with the patron to see if there is a problem with the barcode on her library card.</p> |

| Message | Cause |
|--|--|
| This patron is restricted. | <p>This patron has a restricted status. This usually indicates that you do not want to check out or renew any copies to this patron.</p> <p>To prevent this message from appearing, print out a list of restricted patrons from Reports before circulating with your PHD. Use this list to monitor transactions.</p> <p>See also: For more information about printing patron lists, see “Generating a Patron Name List” on page 575.</p> |
| This patron’s card has expired. | <p>The patron has not renewed his library card. This usually indicates that this patron would normally not be allowed to checkout or renew any copies.</p> <p>To prevent this message from appearing, print out a list of patrons with expired library cards from Reports before circulating with your PHD. Use the list to monitor transactions.</p> <p>See also: For more information about printing patron lists, see “Generating a Patron Name List” on page 575.</p> |
| The temporary copy cannot be deleted because there is a fine on it, or there is a hold. Do not reuse the barcode. | <p>A temporary copy has been checked in. Since there are fines or holds pending on this copy, Circulation Desk cannot delete the temporary title or its copy. The temporary title and copy will be deleted when the fine or hold has been addressed.</p> <p>If you reuse your barcodes for temporary items, make sure that you do not reuse this barcode until the fines or holds have been addressed.</p> <p>See also: For more information about temporary titles and their copies, see “Adding a title during a checkout” on page 139.</p> |
| There are pending holds on this copy. | <p>The copy that was checked out or renewed had pending holds associated with it. You may want to extend the expiration date of these holds to make sure that they do not expire before becoming ready.</p> <p>See also: For more information about extending holds, see “How to extend the life of a hold” on page 169.</p> |
| There is no loan period defined . . . | <p>This message indicates that there is no loan period defined for this transaction type in the Policies tab in System Setup. Circulation Desk will use the loan period defined in the Remote Circulation window.</p> <p>Be sure to set up your circulation policies in the Policies tab in System Setup before circulating with your PHD again.</p> <p>See also: For information about setting up loan periods, see “How to limit loan periods” on page 78.</p> |

Troubleshooting

The most common problems encountered with the PHD involve battery or scanner tip problems. If you have problems using the PHD, please see the manufacturer’s user documentation as well as Appendix E, “Using a PHD+, PHD+ II, or PHD Laser+,” or Appendix F, “Using a PHD Dolphin+.”

Chapter 14 Patron Maintenance basics

This chapter contains general information and instructions for using Patron Maintenance, including searching for patron records.

See also: For information about how to prepare for Patron Maintenance by setting the default patron type or changing the prompts in user-defined fields, see “Making it easier to create new patrons” on page 72.

About Patron Maintenance

Patron Maintenance provides librarians and library staff with an easy way to maintain the patron database. With Patron Maintenance, you can add new patron records by creating or importing them. You can update or delete patron records individually or in groups. You can also import patron pictures. From Patron Maintenance and Circulation Desk, you can view, add, or edit patrons and print a summary of information about your patron’s checkouts, transaction statistics, holds, fines, and personal information.

See also: For more information about viewing and printing patron information from within Circulation Desk and Patron Maintenance, see “Viewing and printing patron information” on page 130.

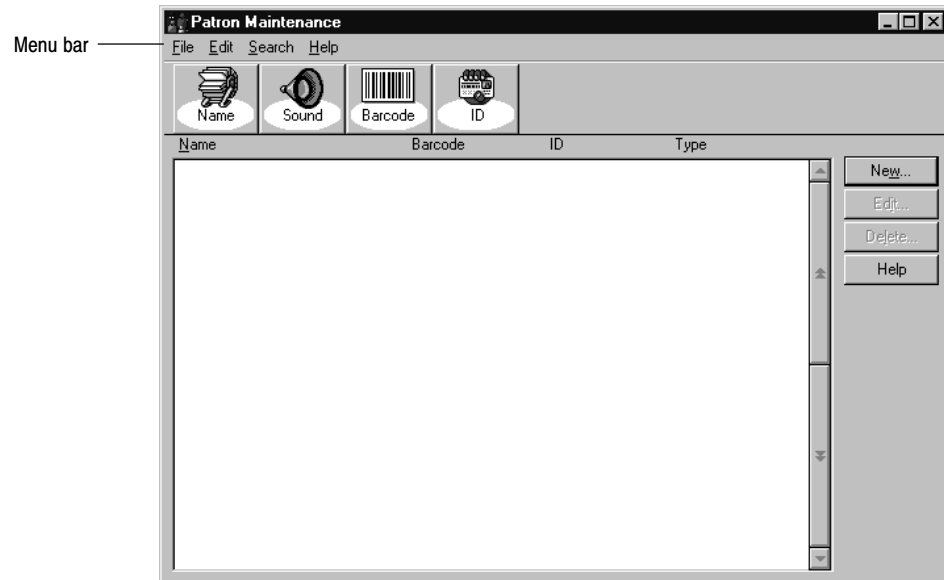
Using Patron Maintenance

From the computer desktop, open the Follett Applications folder and double-click the Patron Maintenance icon.

Note: You can also access the Follett Applications menu from the Windows Start | Programs menu or from the Mac OS Apple menu.

If you are using the password protection option in the System Setup module to limit access to the Patron Maintenance module, a password dialog appears. Type

the password and click OK. The Patron Maintenance default password is **MODPATRON**. The Patron Maintenance main window appears:







From the Patron Maintenance main window, you can choose to search for a record, create a record, edit or delete existing records once they are found, or access the menu bar. From the menu bar, you can access each of the following submenus, as well as the online help features:

- File Menu—Contains the commands to import and export patron information and to close Patron Maintenance.
- Edit menu—Contains five options for maintaining patrons globally, individually, and with a PHD.
- Search menu—Contains four options for finding patron records.
- Help menu—Contains options for finding the help pertaining to Patron Maintenance, and the About dialog. From the About dialog, you can see product information for the application, the current number of patrons, titles, and copies in the system, and run the System Circulation Statistics and System Information Reports (see Chapter 39, “System reports”).

Searching for patron records

Although you can search for patron records at any time, you’ll need to search for a patron record before you can edit or delete it. Both the toolbar and the Search menu provide quick access to search strategies. The Patron search options table describes the search strategy associated with each search button on the Patron Maintenance toolbar and gives examples of the data needed for each search.

Patron search options

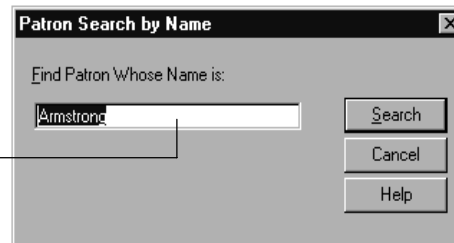
| Button | Description |
|---|--|
|  | Search using the patron's last name. Example: Schmidt, Betty or Schmidt |
|  | When you're not sure of the spelling, start the search with a name that sounds like the patron's last name. Type at least the first two letters for a truncated search. Example: To search for a patron named Nowles, type No or Noles |
|  | Search using the patron's barcode. Example: 70900934532110 |
|  | Search using the patron's ID number, which is often the social security number or student number. Example: If you are using social security numbers for the ID, type 630-98-1823 |

How to search for a patron record**Search**

by Name...
by Sounds like...
by Barcode...
by ID...

1. On the Patron Maintenance toolbar, click one of the search buttons or select a search option, such as by Name, from the Search menu. A Patron Search dialog appears, similar to the following example:

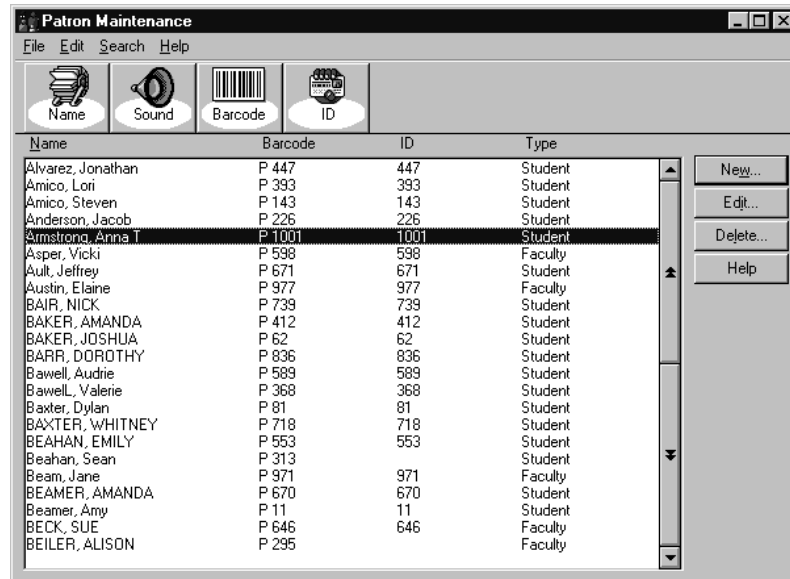
It's okay to enter partial names, but numbers must be exact.



2. In the text box, depending upon which method you chose, type the last name, barcode number, ID number, or the "sounds-like" version of the name,

and then click Search. Patron Maintenance displays a list of patrons in the Patron Maintenance main window, with the patron's name highlighted:

Use the arrow keys to move up or down the list. Use the **HOME** key to go to the top of the list, or the **END** key to go to the bottom.



What happens if the patron isn't found

When a search doesn't result in an exact match, Patron Maintenance displays one of the following:

- A list of patrons with the closest matching patron name highlighted for name or "sounds-like" searches. If one of the displayed names isn't correct, try another search entry.
- A message informing you that the number you entered is not valid for the barcode or alternate ID searches. Click OK to close the box and try again.

Chapter 15 Maintaining individual patron records

This chapter contains general information about maintaining individual patron records and specific instructions for the following maintenance tasks: adding and editing a patron record; adding, editing, and deleting addresses; adding and editing an important message or a note; adding, replacing, and removing patron pictures; and deleting individual patron records.

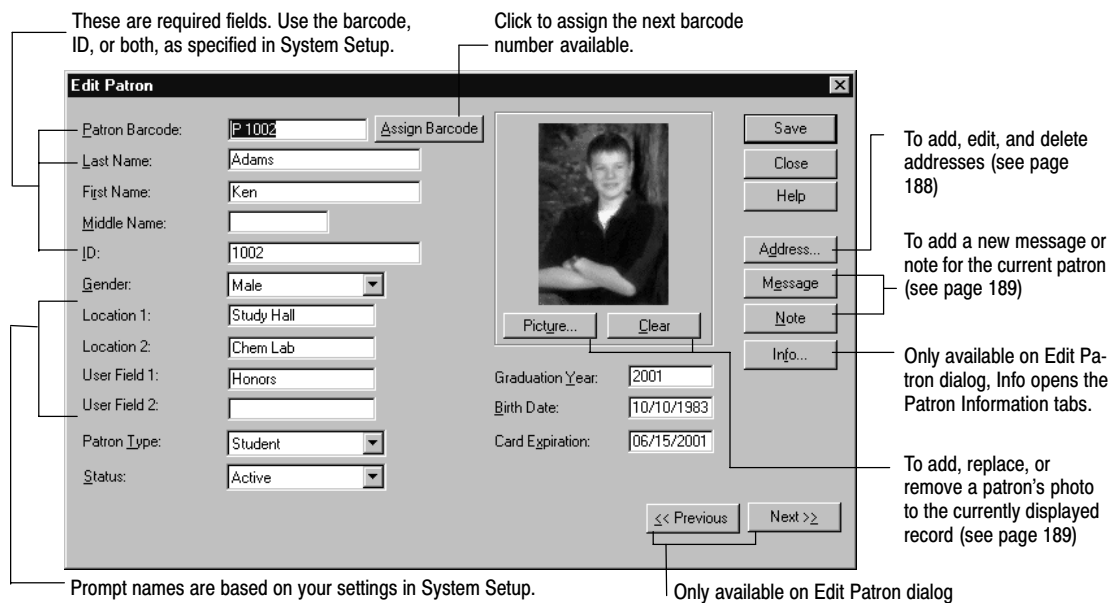
About maintaining individual patron records

Depending on your settings in System Setup, each patron record requires a last name and barcode or identification number. All other fields are optional. You can add patrons, edit and delete the primary or secondary address information, and delete patrons in Patron Maintenance. You can also add or edit patron records from Circulation Desk (see “Adding or editing a patron” on page 139).

See also: For information about the global maintenance of records, see Chapter 16, “Maintaining patron records in batches.”

How to add or edit a patron record

1. To add a patron record in Patron Maintenance, click New on the Patron Maintenance main window. To edit an existing patron record, first find the patron’s record by using any search method. Select the appropriate patron in the list, and click Edit. The desired dialog appears:

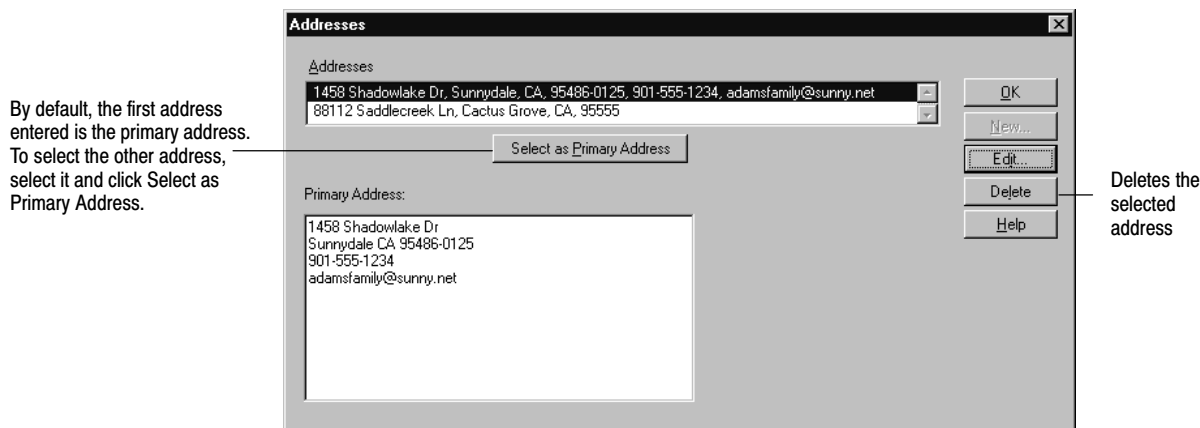


2. Fill in the new or updated information. To save the record, click Save. If you are adding patrons, the dialog clears so you can add more patrons.

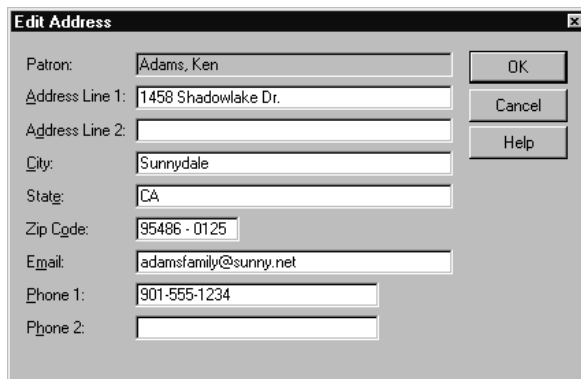
How to add, edit, and delete addresses

Patrons can have up to two addresses in their records. You can add addresses when you are creating a patron record or later when you are editing the record. When there is more than one address, the address identified as the patron's primary address will be used for patron notices. You can also edit the address or delete one or both of the addresses.

1. On the Add Patron or Edit Patron dialog, click Addresses. The Addresses dialog appears:



2. Click New to add a new address or Edit to change the highlighted address. The Add Address or Edit Address dialog appears:



3. In the dialog, add or edit the necessary information. A complete address for one location can include two lines of street address (such as street number and name on the first line and the rural route or postal box number on the second line) and two phone numbers. When you're finished, click OK. The Addresses dialog reappears, displaying the address information you entered. Click OK to return to the Add or Edit Patron dialog, and then click Save.

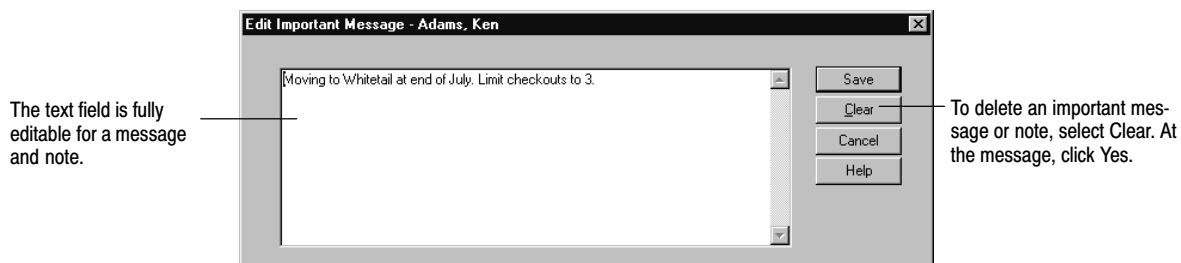
How to add or edit an important message or a note

To display miscellaneous information about a patron when his or her record is accessed, Patron Maintenance lets you attach **important messages** and **notes** to patron records.

An important message appears automatically when anyone accesses the patron's record in Circulation Desk and Patron Maintenance (see "Important messages for patrons," page 126). Use an important message to alert library staff to special issues regarding individual patrons, such as having a large fine or a change in borrowing privileges.

A note appears only when the Note tab is selected from the Patron Information dialog (see "Viewing and printing patron information," page 130). Use a note to inform the staff of non-critical information about a patron, such as a reminder that the patron is looking for literature about organized bicycle rides in Iowa.

1. From the Add or Edit Patron dialog, click Message or Note. The appropriate dialog appears:



2. When you finish adding, editing, or clearing the information, click Save. Once the Add or Edit Patron dialog reappears, click Save.

How to add, replace, or remove a patron picture

Once a patron's picture is added to a record, any time the patron's information displays in a window, the patron picture will also appear in a floating window that the user can move around. In Circulation Desk, the picture displays when the patron's record is accessed for Checkouts, Checkins, Ready Holds, Fines attached, Renewals, Copy Status, and Lost Copies.

Note: A Show Patron Picture/Hide Patron Picture toggle is available from the File menu in Circulation Desk (see page 122).

See also: For information about importing patron pictures, see page 204.

1. To add a patron picture, from the Add or Edit Patron dialog, click Picture. The Add Patron Picture dialog appears. Select the file that contains the patron's photograph and click Open. The image is added to the Patron Picture window. If the image can't be loaded, a message appears. Make sure your pictures meet the format, color, and size requirements outlined in the table on page 190. To save the image in the patron database, click Save on the Add or Edit Patron dialog.

Patron picture format requirements

| Picture Property | Valid specifications |
|----------------------|---|
| Windows file formats | JPEG File Interchange Format (*.jpg), Windows Bitmap (*.bmp), Tagged Image File Format (*.tif), and PC Paintbrush (*.pcx). |
| Mac file formats | Windows (.bmp), Graphics Interchange (.gif), JPEG/JFIF compliant (.jif, .jpg, .jpeg), MacPaint painting (.mac), Photoshop (R) file (.psd), PICT (.pct), Portable Network Graphics (.png), QuickDraw GX image, QuickTime image file (.qti), Silicon graphics image (.sgi), TIFF, Targa (.tga). |
| Colors | Only 8-bit (256 color) or 24-bit pictures are allowed (no 1-bit or 4-bit). |
| Size | No greater than 100K. We do not support LZW compression. |

- To replace an existing patron picture, open the patron’s record from the Add or Edit Patron dialog and follow the instructions in step 1. To remove the patron’s picture from the database, open the patron’s record from the Add or Edit Patron dialog and click Clear.

How to delete individual patron records

Use any search method to locate the desired patron. The patron list appears in the Patron Maintenance window:

Highlight the patron you want to delete.

Click Delete. A warning message appears, asking you to verify that you've selected the correct patron. Click Yes to proceed.

Warning: Once you confirm the deletion, you cannot stop or undo the process.

| Name | Barcode | ID | Type |
|-------------------|---------|------|---------|
| Alvarez, Jonathan | P 447 | 447 | Student |
| Amico, Lori | P 393 | 393 | Student |
| Amico, Steven | P 143 | 143 | Student |
| Anderson, Jacob | P 226 | 226 | Student |
| Armstrong, Anna T | P 1001 | 1001 | Student |
| Asper, Vicki | P 598 | 598 | Faculty |
| Ault, Jeffrey | P 671 | 671 | Student |
| Austin, Elaine | P 977 | 977 | Faculty |
| BAIR, NICK | P 739 | 739 | Student |
| BAKER, AMANDA | P 412 | 412 | Student |
| BAKER, JOSHUA | P 62 | 62 | Student |
| BARR, DOROTHY | P 836 | 836 | Student |
| Bawell, Audrie | P 589 | 589 | Student |
| Bawell, Valerie | P 368 | 368 | Student |
| Baxter, Dylan | P 81 | 81 | Student |
| BAXTER, WHITNEY | P 718 | 718 | Student |
| BEAHAN, EMILY | P 553 | 553 | Student |
| Beahan, Sean | P 313 | | Student |
| Beam, Jane | P 971 | 971 | Faculty |
| BEAMER, AMANDA | P 670 | 670 | Student |
| Beamer, Amy | P 11 | 11 | Student |
| BECK, SUE | P 646 | 646 | Faculty |
| BEILER, ALISON | P 295 | | Faculty |

Highlight the patron, and click Delete. A confirmation message appears. If overdues, holds, fines, or checkouts still exist for the patron, the message displays the totals for the checkouts, fines, and refunds. To continue with the deletion, click Yes. The patron’s record is then completely deleted from the database.

Important: The copy status of any copy currently checked out to the deleted patron is changed from Checked Out to Lost. Any holds placed on lost copies are deleted during the next morning’s daily startup.

Chapter 16 Maintaining patron records in batches

This chapter provides general information about globally editing patron records. It also provides instructions for making sequential and global updates, making updates using a PHD, making global deletes, and deleting patrons with a PHD. The chapter also contains explanations for the exception reports that may result when the system processes the data stored in a PHD.

About global maintenance

Global maintenance lets you make the same changes to a group of patron records. The patron records in the group are selected either by a common element, such as patron type or homeroom, or from a PHD file of barcode scans. The contents of certain fields in the patron records can then be changed, or the records themselves deleted. In addition, individual records can be updated sequentially. Global maintenance functions include: Global Update; Update via PHD; Global Delete; Delete via PHD; and Individual Update.

Global Update is a search and replace feature you can apply to a group of patron records. You first select the patron records to update (e.g., all seniors, or all patrons with a certain Location 2). You then select which field in the record to update. You can use Update via PHD to update patrons whose barcodes are stored in your PHD.

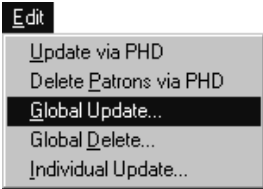
You can use Global Delete to delete all patrons whose library cards expired or who graduated in a certain year or who have a certain status or patron type. You can use Delete Patrons via PHD to delete all patrons whose barcodes are currently stored in your PHD.

Individual Update lets you update multiple fields at once for individual patrons. The individual patrons are identified by typing or scanning the patron barcodes. This saves you the time you'd otherwise spend editing each individual record.

Globally updating batches of patrons

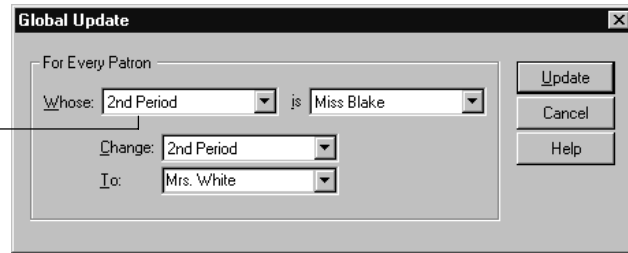
Editing a group of patron records at one time is a two-part procedure. First, identify the group of patron records to update. You can use the following patron record fields as the basis for a global change: Status, Patron Type, Location 1 or 2, or User Field 1 or 2. Then, select the field that you want changed and what you want the contents of that field to be. Patron Maintenance will find every record in the group and update the contents of the field selected.

Warning: All changes are immediate. You cannot undo them by canceling the process.



1. On the Patron Maintenance main window, open the Edit menu and select Global Update. The Global Update dialog appears.
2. From the Whose and Is lists, select the name and contents of the patron field that you want to use as a basis for the change. This selection determines which records will be updated. (The prompt names of the location and user fields are based on what you entered in System Setup.)

The selections in this field are: Status, Patron Type, Location 1, Location 2, User Field 1, and User Field 2.



3. From the Change list, select the name of the field that you want to change in the patron records. In the To combo box, select or type the new contents.
4. When you finish making your selections, click Update. A confirmation message appears next. To start the update, click Yes. The Global Update progress dialog appears. When the process is complete, Cancel changes to Close. Select Close, then Cancel to exit to the Global Update dialog.

Example: You want to change the name of one of the 2nd period teachers. You've entered teacher names in the User Field 1 (and changed the prompt to "2nd Period") of the patron records, and you want to update them all at once. From the Whose list, select "2nd Period." From the Is list, select "Miss Blake." From the Change list, select "2nd Period." In the To combo box, type **Mrs. White**. Click Update. Patron Maintenance will find all patron records with "Miss Blake" in the "2nd Period" field, and change the "2nd Period" field to contain "Mrs. White."

Updating information for a few individual patrons

When you want to update one or more fields in a few individual patron records, use Individual Update. Again, let's say you want to change the classroom assignments for part of one grade to Room 204.

Warning: All changes are immediate and can only be reversed manually.



1. On the Patron Maintenance main window, open the Edit menu and select Edit | Individual Update. The Individual Update dialog appears.
2. In the left column, select Change, Do Not Change, or Clear from the list box for the fields that apply to these patrons. If you select Change, a list box appears to the right. In this box, select or type the new contents of the field. You can select and change any or all of the fields listed at the same time.

Scan or type the patron's barcode number after making the choices below.

Do Not Change is the default. If you select Change, a list of possible values for that field appears. Clear deletes any data in the field.

Selecting Change displays and activates these To list boxes.

These prompts depend on the entry made in System Setup.

3. Click in the Barcode text box. Scan or type a patron's barcode number, and then select Update. As the record is processed, the patron's name, ID number, and barcode number appear under Last Patron Processed.
4. Scan or type the remaining barcodes to change and update the information as needed.

Example: For Homeroom (Location 1), select Change and type **204** in the To combo box. Click in the Barcode text box. Type **P 962** and click Update. Continue entering individual barcodes. For every barcode you scan, the Homeroom of that patron changes to **204**.

Updating patron records using a PHD

You can quickly change Patron Status, Patron Type, User Field 1 or 2, or Location 1 or 2 for a group of patrons scanned into your PHD. Only one field can be updated at a time. If you want to change several different fields, process the data once for each field you want to change.



Warning: All changes are immediate. You cannot undo them by canceling the process. Remember to erase any previous scans in your PHD so that no patron record is unintentionally updated. To erase scans from a PHD+, PHD+ II, or PHD Laser+, see page 664. For a PHD Dolphin+, see page 679.

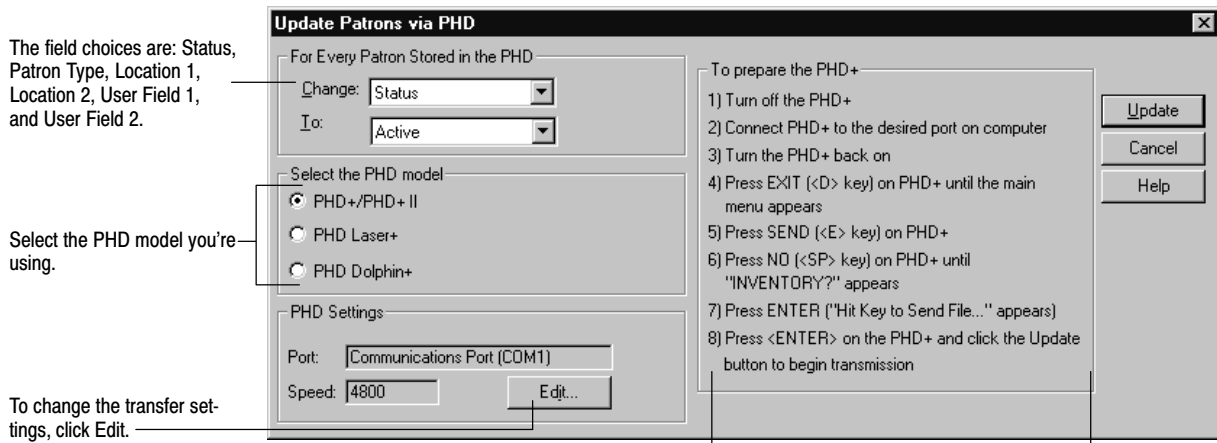
Example: A class moves to a new homeroom and you need to update the patron records with the new homeroom and you need to update the patron records with the new Location 1. Using your PHD, you could scan the barcodes on all of the students' cards, select the information you want changed, and then update the selected patron information for all students in the classroom at once.

1. With your PHD, scan the barcodes of the patrons you want to update. For instructions on collecting patron scans with the PHD+, PHD+ II, or PHD Laser+, see "Collecting inventory, copy, or patron data" on page 663. To collect patron scans with a PHD Dolphin+, see page 676.

When you finish collecting scans, connect your PHD to your computer. See the manufacturer's documentation or Appendix E, "Using a PHD+, PHD+ II, or PHD Laser+," or Appendix F, "Using a PHD Dolphin+," for instructions.

Note: To make sure you have scanned the correct barcodes, generate a list of the patron names stored in your PHD before updating their records. (See "Generating a Patron Name List" on page 575.)

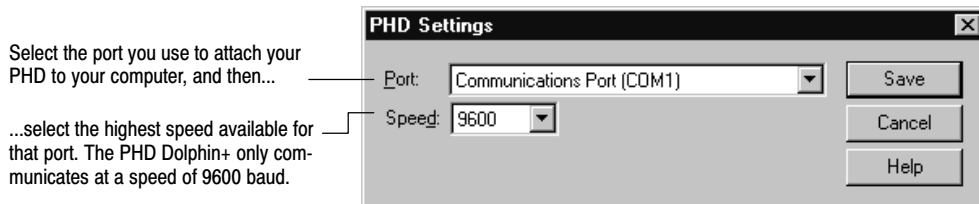
2. From the Patron Maintenance main window, select Edit | Update via PHD. The Update Patrons via PHD dialog appears. From the Change list, select the name of the field you want to update. Then select or type the new contents for that field in the To combo box.



These instructions change based on the PHD you choose.

Warning: To protect your equipment, make sure you turn off your PHD and computer before connecting or disconnecting the PHD.

3. Select the PHD model you're using. If you don't need to change the transfer settings, go to step 4. Otherwise, click Edit. The PHD Settings dialog appears:



Set the port and speed for your PHD, and click Save.

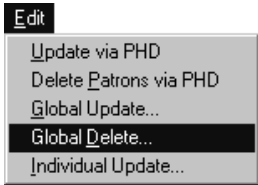
4. Once you've selected the correct PHD model and adjusted the PHD settings as desired, simply follow the instructions displayed on the screen.

When you click Update, a confirmation message appears. To continue, click Yes. Once the data transfer process begins, a progress dialog appears. If any problems occurred during the patron update process, an exception report is generated. Carefully check the report. It is located in the Exception Reports folder within your Follett folder.

Globally deleting patrons

With Global Delete, you can delete multiple patron records at one time. This is especially useful when a large number of patrons are no longer associated with your library. You can delete patrons based on their Graduation Year, Card Expiration Date, Patron Status, or Patron Type. You can also choose whether or not to delete those patrons with outstanding checkouts, fines, refunds, or holds. If you choose to do so, any copies checked out to them are marked as lost, and any fines, refunds, or holds are deleted.

Warning: All deletions are immediate. You cannot undo them by canceling the process. The data cannot be recovered.



1. On the Patron Maintenance main window, open the Edit menu and select Edit | Global Delete. The dialog appears. Select the field (Graduation Year, Card Expiration Date, Status, or Patron Type) on which you want to base the deletions, and then specify your criteria:

To delete patrons based on their **Graduation Year**, select the year and the patron type.

To delete patrons based on their **Card Expiration Date**, type the starting and ending dates and select the patron type.

To delete patrons based on their **Status or Patron Type**, select the appropriate setting from the list.

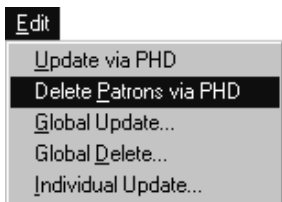
If you want to keep patrons that have active checkouts, holds, fines, or refunds due, clear this option.

2. After you make your selections, click Delete. A confirmation message appears. Click OK. While deleting the selected patrons, Patron Maintenance displays a progress dialog. When the delete process ends, Patron Maintenance produces an exception report that lists, for each patron meeting the criteria, the patron name, barcode number, ID number, and whether the patron was deleted or skipped (and the reason). If you chose to delete patrons with active transactions, any copies that were checked out are marked as lost, and any fines, refunds, or holds are deleted.

Deleting patrons with a PHD

This feature lets you delete multiple patron records based on barcode data that is stored in a PHD. You can also determine whether you are going to delete patrons with outstanding checkouts, fines, refunds, or holds.

Warning: All deletions are immediate. You cannot undo them by canceling the process. The data cannot be recovered. Remember to erase any previous scans in your PHD so that no patron records are unintentionally deleted. To erase scans from a PHD+, PHD+ II, or PHD Laser+, see page 664. For a PHD Dolphin+, see page 679.

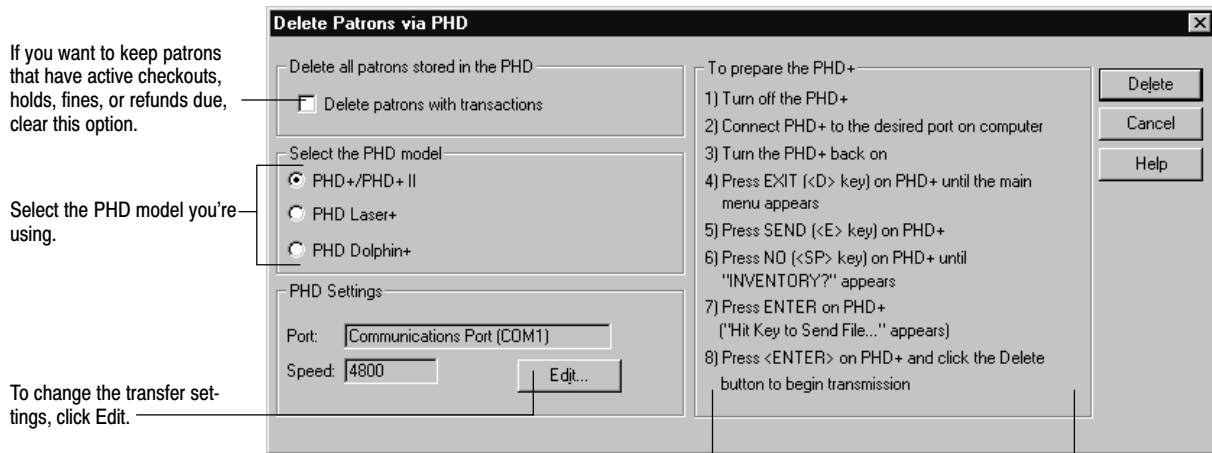


1. With your PHD, scan the barcodes of the patrons you want to delete. For instructions on collecting patron scans with the PHD+, PHD+ II, or PHD Laser+, see "Collecting inventory, copy, or patron data" on page 663. To collect patron barcodes with a PHD Dolphin+, see page 676.

When you finish collecting scans, connect your PHD to your computer. See the manufacturer's documentation or Appendix E, "Using a PHD+, PHD+ II, or PHD Laser+," or Appendix F, "Using a PHD Dolphin+," for instructions.

Note: To make sure you have scanned the correct barcodes, generate a list of the patron names stored in your PHD before deleting their records. (See "Generating a Patron Name List" on page 575.)

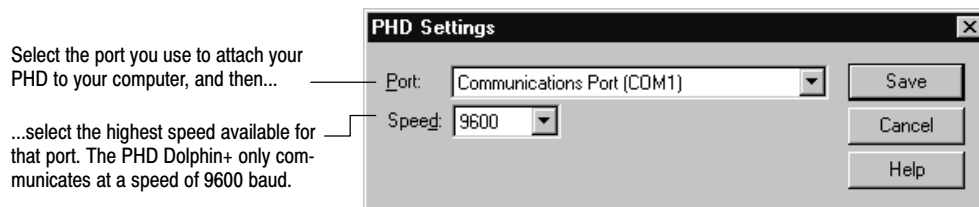
- From the Patron Maintenance main window, select Edit | Delete Patrons via PHD. The following dialog appears:



These instructions change based on the PHD you choose.

Warning: To protect your equipment, make sure you turn off your PHD and computer before connecting or disconnecting the PHD.

- Decide if you want to delete patrons with active transactions, and then select the PHD model you're using. If you don't need to change the transfer settings, go to step 4. Otherwise, click Edit. The PHD Settings dialog appears:



Set the port and speed for your PHD, and click Save.

- Once you've selected the correct PHD model and adjusted the PHD settings as desired, simply follow the instructions displayed on the screen.

When you click Delete, a confirmation message appears. Click OK. While deleting the selected patrons, Patron Maintenance displays a progress dialog. When the delete process ends, Patron Maintenance produces an exception report that lists, for each patron barcode scanned, the patron name, barcode number, ID number, and whether the patron was deleted or skipped (and the reason). If you chose to delete patrons with active transactions, any copies that were checked out are marked as lost, and any fines, refunds, or holds are deleted.

Interpreting the exception report

The following table lists messages that may be generated when the system checks your patron barcodes during the processing of your PHD data:

Patron Maintenance exception messages

| Exception message | Meaning |
|---|---|
| Barcode <patron barcode> not found | Patron barcode transferred from your PHD for processing cannot be found in system database. |
| Invalid barcode | Patron barcode does not follow the symbology defined in Barcode Setup for patrons. Verify Barcode Setup is valid for symbology used. |

Chapter 17 Importing patron information

This chapter contains general information about importing patron records and patron pictures, formatting information, getting ready to import, importing patron records, importing patron pictures, and interpreting the exception report.

About importing patron records

If your administration sends you disks containing new patron records, you can decrease the amount of time required for annual updating. You can use the Import Patrons option on the Patron Maintenance File menu to add new patron records or to update existing records.

To be imported successfully, the source file must be in the correct format. If the patron information you want to import was exported from a pre-Unison database or from another vendor, you can either use the Patron Conversion Utility or create your own import file with a text editor. For instructions on using the Patron Conversion Utility, see the *Patron Conversion Guide*. If you prefer to create your own import file, the following section explains the formatting for a patron import file.

If you already have a properly formatted file and are ready to import, skip the following section and go to “Importing patron records” on page 202.

Formatting information for the librarian’s technical personnel

The following patron file format information is provided to help you or your technical personnel prepare a patron file for import into Patron Maintenance. If you don’t have experience creating or editing comma-delimited text files, you may want to seek additional assistance.

Follett’s patron import data file formats

This type of file can be created with any text editor, such as the Windows Notepad application. You can also export patron records using the Export Patrons function, modify the data in a text editor, and then re-import the data (choosing to replace existing records).

The import file format is flat ASCII text, comma-delimited. Each patron record takes up one line of the file. Each line in the file must end with a carriage return. String fields in the record are surrounded by quotes (e.g., “Smith”). Numbers, including dates, are the actual numeric value. Each field is separated from the one after it by a comma. Empty fields contain no characters.

Header portion of the file

The first line in the import file must be a header line. The third field, Patron file format version, *must* contain **4.00** if the file is in the 31-field format described in “Patron record portion of the file.” Do *not* enter the current application version that you are running. Although it is not required that the other header fields contain data, each field, listed in the following table, must exist in the header.

| Field | Format | Maximum length | Example |
|----------------------------|----------------|--------------------------|----------------------|
| School name | String | 30 | “Anytown Elementary” |
| Program name | String | 20 | “Patron Maintenance” |
| Patron file format version | String | 10 | “4.00” |
| Date created | Num, YYYYMMDD | 8 (exactly) | 19990901 |
| Patron count | Num | 4 (exactly, zero-padded) | 0009 |
| Disk number | Num | 2 (exactly, zero-padded) | 01 |
| Final disk? | String, Y or N | 1 | “Y” |

The following example of a file header indicates that patrons from Anytown Elementary were exported by Patron Maintenance module version 4.00 on Sept. 1, 1999 (19990901). There are 9 (0009) patron records. This is the first disk (01) in the series and is also the last disk (“Y”) in the series.

“Anytown Elementary”, “Patron Maintenance”, “4.00”, 19990901, 0009, 01, “Y”

Patron record portion of the file

The remaining lines in the import file are patron records. Each record must contain *all* of the 31 fields, whether or not they contain data. String fields must be surrounded by quotation marks, and all fields are separated (delimited) by commas. Each record must end with a hard return; there must not be any trailing space after the last field.

The Last Name field must contain data. In addition, the Barcode and/or Alternate ID field(s) must contain data. This second requirement depends on your preference. Refer to your System Setup | Patron Maintenance | Patron Defaults for your required patron field(s).

The following table contains the specific information for each field:

Patron fields

| Field | Format | Maximum length | Example |
|--------------|--------|----------------|-------------|
| Barcode | String | 14 | “P 52” |
| Alternate ID | String | 20 | “241661234” |
| Last name | String | 20 | “Sellers” |
| First name | String | 20 | “Patty” |

Patron fields (Cont.)

| Field | Format | Maximum length | Example |
|------------------------------------|-----------------|-----------------------|------------------|
| Middle name | String | 10 | "Jo" |
| Card expiration date | Num YYYYMMDD | 8 (exactly) | 20050630 |
| Graduation year | Num, YYYY | 4 (exactly) | 2005 |
| Birth date | Num YYYYMMDD | 8 (exactly) | 19880214 |
| Gender | String | 1 (M, F, U, or blank) | "F" |
| Patron Type | String | 3 (all caps) | "S" |
| Patron status | String | 1 (A, I, or R) | "A" |
| Location 1 | String | 15 | "Johnson" |
| Location 2 | String | 15 | "Gymnasium" |
| User field 1 | String | 15 | "4th Period" |
| User field 2 | String | 15 | "ESL" |
| Address 1 Line 1 | String | 32 | "19 Ridge St" |
| Address 1 Line 2 | String | 32 | "Route 3" |
| Address 1 Line 3 / City | String | 32 | "Sycamore" |
| Address 1 Line 4 State/Province | String | 32 | "Illinois" |
| Address 1 Zip/Postal Code | String | 20 | "60987" |
| Address 1 Email | String | 32 | "pjo@aol.com" |
| Address 1 Phone 1 | String | 28 | "815-828-9598" |
| Address 1 Phone 2 | String | 28 | "(895) 982-8518" |
| Address 2 Line 1 | String | 32 | "1037 Tame Rd" |
| Address 2 Line 2 | String | 32 | "P O Box 1972" |
| Address 2 Line 3 / City | String | 32 | "McHenry" |
| Address 2 Line 4 State/Province | String | 32 | "Wisconsin" |
| Address 2 Zip/Postal Code | String | 20 | "70998" |
| Address 2 Email | String | 32 | "red@school.org" |
| Address 2 Phone 1 | String | 28 | "(724) 737-8487" |
| Address 2 Phone 2 | String | 28 | "724-887-3754" |

The patron in the following example is Patty Sellers, whose record data is the same as that shown in the above table. In the export file, this record would appear as a single line terminated by a hard return. Please note that there are no trailing spaces at the end of the record.

"P52","241661234","Sellers","Patty","Jo",20050630,2005,19880214,"F","S","A","Johnson","Gymnasium","4th Period","ESL",
"19 Ridge St","Route 3","Sycamore","Illinois","60987","pjo@aol.com","815-828-9598","(895) 982-8518","1037 Tame Rd","P
O Box 1972","McHenry","Wisconsin","70998","red@school.org","(724) 737-8487","724-887-3754",¶

Note: The paragraph symbol (¶) in the previous example is being used to show the hard return at the end of the record. It would not normally be visible.

Error checking in importing

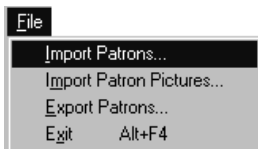
- Import checks the maximum length of each field. Any field larger than the maximum length is truncated when imported.
- Any trailing spaces in string fields are deleted. Leading spaces are not.
- Barcodes may not be longer than 14 characters.
- All date fields are stored as numbers, YYYYMMDD. Standard month/day checking is applied. Years must be between 1900 and 2037.
- Any record that is invalid generates a line in the exception report listing the patron name (if possible) and a brief error message.

Importing patron records

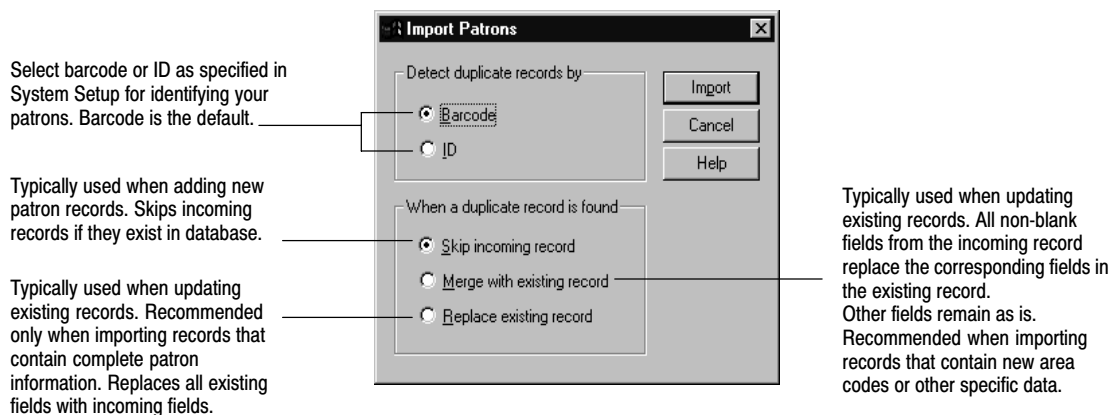
Before you start, it is very important to check four factors that impact the importing of your data. If they are not correctly set up, your records will not be imported successfully.

- Check the barcodes used in the records being imported. They must match the barcode symbology set up for patrons in System Setup | Site | Barcodes, including the Type Identifier character(s).
- Check the default patron type in System Setup | Patron Maintenance. If you are importing patron records that don't have patron types, Patron Maintenance assigns this default patron type to the records being imported.
- Check the required patron fields in System Setup | Patron Maintenance. If the records in the import file do not contain the field(s) specified, the import will fail.
- Check the file format used for the records. Make sure that the records were sent to you in the Follett patron file format. If they're not in the Follett format, Patron Maintenance will not import them into your database. For information on creating a file in the correct format, see the previous sections.

1. On the Patron Maintenance main window, open the File menu and select Import Patrons. The Import Patrons dialog appears. Select a basis for detecting duplicates, and then select the subsequent action, either Skip,



Merge, or Replace, that Patron Maintenance executes when a duplicate record is found.



2. If you are importing patrons from a floppy disk, insert the disk into the floppy drive of your computer. On the Import Patrons dialog, click Import. The Open dialog of your operating system appears.
3. Select the patron file you want to import from the disk, and click Open. The system begins to import the records, displaying the progress of the import in the Patron Import progress window. To interrupt the import at any time, click Cancel on the progress window.
4. When the import is complete, a message appears asking if you want to import another file. When you are finished importing, click Close. The application generates an exception report with the number of patron records processed and a description of any errors encountered.

Interpreting the exception report

Any errors encountered during the import patron process are entered into an exception report. The exception report resides within the Follett folder in Exception Reports. This table lists the possible errors and their meanings.

Patron Maintenance errors during a patron import

| Error message | Meaning |
|---|--|
| Barcode <number> is not a valid patron barcode. | Patron barcode does not follow the symbology defined for patrons in System Setup. Verify that the barcode setup is valid for the symbology used. |
| Birth date field invalid: Defaulted to blank. | Invalid birth dates are set to 0. |
| Card expiration date field invalid: Defaulted to blank. | Invalid card expiration dates are set to 0. |
| Duplicate <Barcode or ID>: <value> exists. | A duplicate record was found and since duplicates are to be skipped, this record is so noted. Verify duplicates. |
| <Field name> field too long. Truncated. | One of the fields is longer than the maximum length allowed. The data is truncated to the maximum length during import. Check Follett's patron import data file formats, starting on page 199. |

Patron Maintenance errors during a patron import (Cont.)

| Error message | Meaning |
|--|--|
| Graduation year field invalid: Defaulted to blank. | All blank and invalid dates are set to (blank). |
| Graduation year field two digit year adjusted to <four digit year>. | If only 2 digits are provided for the graduation year, it is converted to a 4-digit date: 19 is prefixed to 38-99, 20 is prefixed to 00-37. |
| The import record does not contain the proper number of fields. | Patron record does not contain the proper number of fields. Check Follett's patron import data file formats, starting on page 199. |
| Invalid patron gender: Set to (U) unknown. | The patron's gender is not "M" (male), "F" (female), "U" (unknown), or blank. If none exists or entry is incorrect, the gender is set to "U." Verify patron's gender. |
| Invalid patron status: Set to Inactive. | The valid patron status types are: Active (A), Inactive (I), and Restricted (R). If none exists, the status is set as Inactive during import. Verify the patron's status. |
| <Last name, Barcode, or ID> may not be blank. | Patron record does not contain a last name, barcode, or ID as defined for patrons in System Setup. Verify the name field and your patron type defaults as described in "Making it easier to create new patrons" on page 72. |
| <Zip Code/Postal Code> is invalid: Defaulted to blank. | The library Address Format is set as United States, Canada, or Other Countries, and the Zip Code/Postal Code field does not match the format defined in System Setup. The field is left blank during import. Verify zip/postal code. |

Importing patron pictures

When you want to import a file of patron pictures into your existing patron records, use Import Patron Pictures. You can import a group of patron photos that were compiled into a database file by another company, such as Lifetouch National School Studios or Herff Jones.

Important: Before you start, make sure the import file is formatted correctly. Each patron picture takes up one line of the file. Each line of the file must contain: "<barcode or ID>" , "<picture file name>" (the quotes are optional). Each line in the file must end with a carriage return. There is no header line.

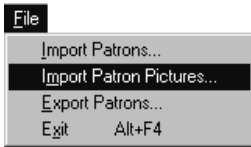
The following is an example of a patron picture import file:

```

"639465","00002.JPG"
"688692","00003.JPG"
"859228","00004.JPG"
"971657","00005.JPG"
"752899","00006.JPG"

```

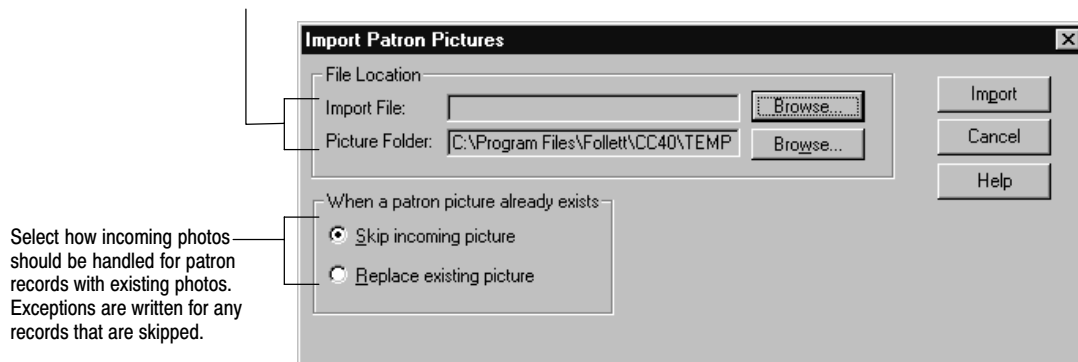
See also: For information about the valid formats for the actual patron pictures, see the table of "Patron picture format requirements" on page 190.



1. On the Patron Maintenance main window, select File | Import Patron Pictures from the menu. The Import Patron Pictures dialog appears. Select the locations of the import file and the patron photos you want to import, and choose how the system should handle duplicates.

Patron Maintenance automatically checks your CC40\TEMP folder for an import file from Lifetouch National School Studios. If found, the path to the file appears in the Import File text box. If you use another vendor, click the Browse buttons to select the proper locations.

- Import File—Points to the text file that associates each picture file with each patron barcode/ID.
- Picture Folder—Points to the folder that contains all the picture files.



If you are using a Herff Jones CD, place the disc into your CD drive. Click the Import File Browse button; select your CD drive (it should display “Herff_jones”); highlight the file “Pref_jpg.txt” and click Open. Back on the Import Patron Pictures dialog, click the Picture Folder Browse button; again navigate to the Herff Jones CD; highlight the folder Jpegs and click OK.

If you are using a Lifetouch CD, you must export the pictures first. To do so, launch your Lifetouch Administrator’s CD v4.0. In the first window, select Follett Software Company from the list and click OK. On the next window, select your CD drive and click OK. The Student List Selection dialog appears. For Student Records, click All. For Export, click Images. The Export Images dialog appears.

If the path to the Image File Folder is incorrect, click Change Location. Select your CC40\TEMP folder or another *existing* folder. Select the same folder for the data linking file (that we call the Import File) named IDLINK.TXT. When both locations are correct, record the path, click Export, and click Yes to the warning message. After the export, select File | Quit. Use these same two location paths on the Import Patron Pictures dialog.

2. When you finish making your selections, click the Import button on the Import Patron Pictures dialog. The system begins to import the patron pictures, displaying its progress in the Import Patron Pictures progress window. To interrupt the import, click Cancel on the progress window.
3. When the import process is complete, Patron Maintenance generates an exception report with the number of patron pictures processed and a description of any errors encountered. If you chose to skip incoming pictures, the exception report also identifies the patron records that were skipped. This report resides within your Follett folder in an Exception Reports folder.

Interpreting the exception report

Any errors encountered during the import patron pictures process are entered into an exception report. This table lists the possible errors and their meanings:

Patron Maintenance errors during a patron picture import

| Error message | Meaning |
|---|--|
| Error occurred finding Patron <Barcode/ID>. | Could not find patron barcode/ID. Verify that the patron's record exists and the barcode is correct in Patron Maintenance. Verify that the barcode in the patron record and in the import file are the same. |
| An error occurred loading Patron <Barcode/ID>'s picture. | Patron's picture failed to load from the database. The file may be invalid. Retry or obtain another copy of the image. |
| An error occurred saving Patron <Barcode/ID>'s picture. | Failed to save picture. The file may be invalid. Retry or obtain another copy of the image. |
| Failed to load Patron <Barcode/ID>'s file <filename>. Error: file was not found. | Unable to load patron barcode/ID, filename (bad file, invalid file). Verify that the patron's record exists and the barcode is correct in Patron Maintenance. |
| Patron <Barcode/ID> cannot be found. | Failed to find patron barcode/ID. Verify that the patron's record exists and the barcode is correct in Patron Maintenance. Verify that the barcode in the patron record and in the import file are the same. |
| Patron <Barcode/ID> was skipped. | Patron already has a picture, and the user chose the Skip option. |
| Unable to display Patron <Barcode/ID>'s file <filename>. | Unable to display picture for patron. The file may be invalid. Retry or import another copy of the image. |

Chapter 18 Exporting patron records

This chapter contains general information about exporting patron records, discusses what you'll need to get ready, and provides instructions on how to export patron records.

About exporting patron records

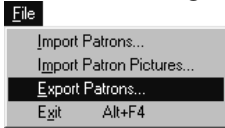
The Export Patrons option allows you to "clean up" your patron database at the end of a school year, send patron records to another school within a district, or allow district-wide access to patron records. Schools within a district can then share patron records, even those exported from different platforms (such as Windows, Macintosh, or DOS). By using the "search and replace" option of a text editor, you can globally update your exported files and re-import them into your database, allowing global updates not found in the Patron Maintenance Global Update functions.

Note: Bar Tender can read exported patron files, allowing you to print your own barcodes using Bar Tender. See Appendix G, "The Bar Tender," for additional information on using Bar Tender with Circulation Plus and Catalog Plus.

Before you begin exporting records, decide whether you want to export your data to your hard drive or to floppy disk.

Make sure you have enough floppies to handle your exported patron records. The actual amount of space required for patron records can vary, based on how much patron data you actually record in the records. A 3.5" disk should hold approximately 4,000 patron records.

How to export patron records



On the Patron Maintenance main window, select File | Export Patrons. In the dialog, select the criteria you want to use to define your export records and check the destination path displayed in the File Name text box. What appears in your Select By and Patron Types drop-down lists will depend on what you defined in System Setup.

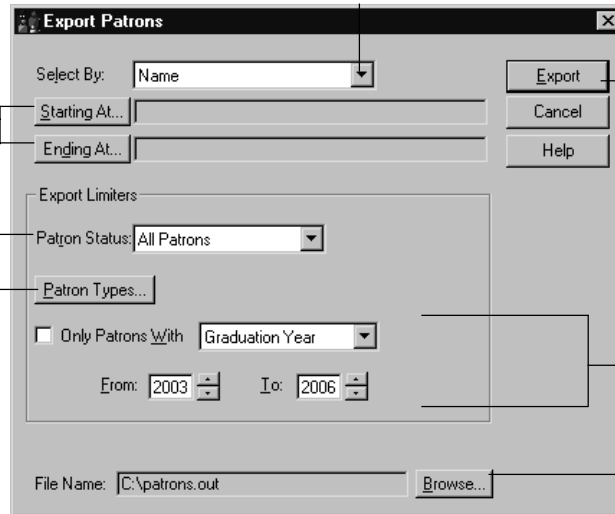
Identify how you want to select patron records to export. The available options include Name, ID, Barcode, Location 1 or 2, and User Field 1 or 2.

Note: The Location and User Fields are customizable patron record prompts. For additional information on changing these prompts, see "Making it easier to create new patrons" on page 72.

Select the range of patrons you want to include in the export. For instructions on selecting the starting and ending records, see "Defining a range" on page 489.

Select patron status to export.

To limit the patron types included in the export, click Patron Types (see page 493).



Click to begin exporting.

To limit the export to certain graduation years or library card expiration dates, select the Only Patrons With check box, choose Graduation Year or Card Expiration Date, and enter the desired years.

To choose another file destination or to specify a different filename, click Browse.

When you click Export, a progress window appears. The scrolling display shows the names and types of patrons being exported. When the export is complete, a message appears at the end of the scrolling display list, and the Cancel button changes to Close.

You can interrupt this process by clicking the Cancel button. If interrupted, the records exported before canceling are saved in the specified file. If you restart the export process with the same selection criteria, a message appears asking whether you want to replace this file.

Chapter 19 Inventory basics

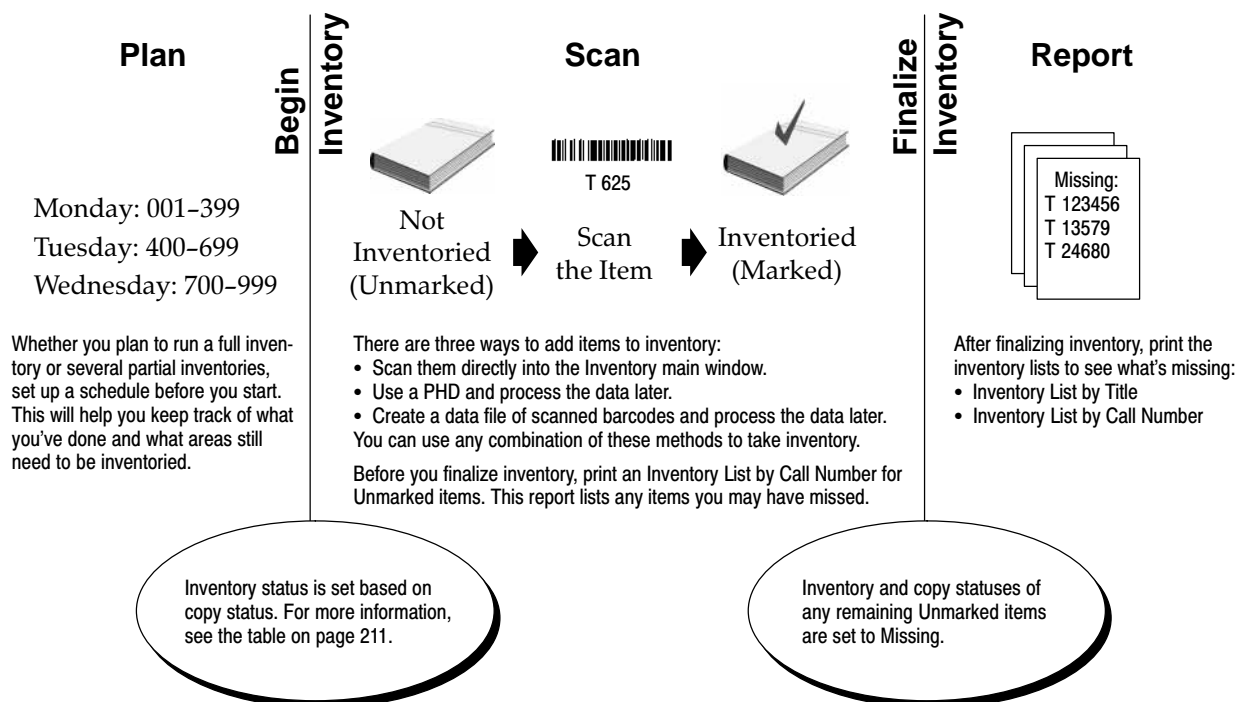
After circulating your collection, you may notice that some items just aren't where they're supposed to be. Inventorying your collection lets you know exactly what you have and what is missing or just misshelved. Once you know what's in your collection, you'll also be in a better position to make acquisition decisions.

With Follett Software's Inventory application, you can choose to take stock of your entire collection or inspect one section at a time. This chapter includes an overview of the inventory process, detailed planning instructions, a checklist to help you during inventory, and instructions for starting and getting around Inventory.

Overview of an inventory

Inventory works with Circulation Desk and Cataloging. This means you can continue to circulate your collection and add new titles and copies while an inventory is in progress. When you finish an inventory, you can print reports by title or call number that list all of the items that are missing from your collection.

The following diagram gives the "big picture" overview of how Inventory works:



Preparing for inventory

Before you start inventory, there are a few steps you can take to help things run smoothly:

- Create a schedule. At some point during the year, you'll probably want to inventory your entire collection. Do you want to run a full inventory or run a series of partial inventories? Please note that each partial inventory must be finalized before beginning the next one. Perhaps you just want to take a look at the status of your high-traffic areas. In any case, divide your library into sections by call number, and record when each section should be inventoried. This helps ensure that you'll inventory your entire collection. After a day of scanning items into inventory, you can also print a list of Unmarked items for that day's range of call numbers to see if any sections or shelves were missed (see "Generating an Inventory List by Call Number" on page 558).
- Determine whether or not the items that are marked Missing are really missing. Print a list of items with a copy status of Missing (see "Generating a Copy List by Status" on page 551). If you find some "missing" items, you can change their copy status to Available by checking them in. This ensures that all items that are Available start inventory with an inventory status of Unmarked (see the table on page 211).
- Print a list of items without call numbers (see "Generating a Copies Without Call Numbers Report" on page 513) and assign call numbers to them. If you have imported MARC bibliographic records with copies, you might have imported them without call numbers. Items without call numbers will not appear on the Inventory List by Call Number, which you'll print before finalizing inventory.
- Make sure you have a current backup of your database. For information, see Chapter 42, "Backing up your database."

How will Inventory affect circulation?

When you begin an inventory, you specify whether you want to run a full inventory or just examine a specific range of call numbers. Inventory then sets the appropriate inventory status for each item included in your inventory. It does this by examining each item's copy status.

Important: The Begin Inventory processing cannot be canceled and requires restricted access to the database. This means that no other Follett applications may be open at any workstation except for the search modules such as OPAC and WebCollection Plus. Once the Begin Inventory processing is complete, normal activities can resume.

The following table shows the relationship between an item's copy status and its beginning inventory status:

| Copy status | Beginning inventory status |
|--|---|
| Available | Unmarked —Items with a copy status of Available should theoretically be somewhere on your library's shelves and need to be accounted for during your inventory. Inventory initially sets the inventory status of these items to Unmarked. Items can only have an inventory status of Unmarked while an inventory is in progress; otherwise, they're Marked or Missing. |
| On Hold Checked Out At The Bindery Lost* Loaned Out Copies with a *NC circulation type | Marked —Inventory marks all items in your collection that are currently accounted for by the system. For each item that has one of these copy statuses, you already have information regarding the current location of the item. |
| Missing | Missing —Any item that was identified as Missing during a previous inventory, or had its status changed in Cataloging, will remain Missing. |

* Lost copies are not considered Missing because the items were checked out before being marked Lost. The person who checked out the item and lost it is held accountable for the item. For more information about marking copies Lost, see "Marking a patron's checkout lost" on page 161.

Note: If you run a partial inventory, only Available copies within your selected range will be assigned an inventory status of Unmarked. All copies outside the range remain Marked or Missing.

Note: Any copies with the circulation type of Non-circulating eBook (*NC) remain Marked. (*NC is intended for eBooks that are non-circulating, non-inventoried, and non-holdable.)

After the Begin Inventory processing is complete, your goal is to enter the barcode of each Unmarked item into inventory. Detailed instructions for the various methods of entering items into inventory are given in Chapter 20, "Taking inventory of your collection."

Normal library activities, such as adding new items to your collection or circulating items, can resume without affecting the results of your inventory:

- If you check out an Unmarked item during an inventory, Circulation Desk automatically changes the inventory status to Marked.
- If you check in an item during an inventory that was checked out before you began the inventory, the inventory status remains Marked.
- At the Inventory main window, if you scan an item that is checked out, Inventory checks the item in for you. It does this because it assumes that you are only inventorying items that you find on your shelves. Since you shouldn't have an item on your shelves that is checked out, Inventory checks the item in. However, when Inventory encounters an item that is checked out while processing remote inventory data, it does *not* check the item in. For more details, see "Using a PHD to inventory your collection" on page 221.

- If you add an item to your collection at any time, during or outside an inventory, Cataloging automatically assigns an inventory status of Marked.

After inventory

Before finalizing an inventory, we recommend that you print an Inventory List by Call Number for the Unmarked items in your collection (see page 558). If you missed a section or shelf or discover a cart full of items that were not reshelfed, they're still Unmarked. Go back and enter those items into inventory before you finalize it.

When you finalize your inventory, Inventory changes the inventory and copy statuses of all Unmarked items to Missing. Inventory also notes the year in which the item is identified as Missing. You can print a list of these items by generating an Inventory List by Title for just Missing items (see page 559). This report shows you which items can no longer be accounted for in your collection.

If you discover that you missed some items or an entire section of your library after finalizing your inventory, don't worry. Even after you finalize, you can reopen your last inventory, which resets the Missing items from your last inventory to Unmarked. If you don't discover your error immediately, you can always reset the Missing items from a specific year or even reset all the Missing items in your collection. You can then scan the missed items into Inventory and finalize your inventory again. For more detailed information about resetting Missing items, see "Resetting Missing copies" on page 231.

Note: When you reopen your last inventory or reset Missing items from a specific year, Inventory only resets the specified Missing items to Unmarked. It does not reset items identified as Missing in other years. None of these options will touch items that have already been Marked.

Inventory Checklist

As you take inventory of your collection, use this checklist to keep track of your progress. You may copy this page (front and back) for future use. For detailed information about these ten steps, please consult the Inventory, Reports, and Backup and Restore chapters and the PHD appendices in the User's Guide. Before taking inventory for the first time, we recommend that you read the preceding sections, starting with "Preparing for inventory" on page 210, and all of chapter 20.

Steps for inventory

- 1. Create an inventory schedule.
 - Decide whether to run a full inventory or a series of partial inventories.
 - Divide your library into sections by call number and determine the order in which you will inventory them.

 - 2. Prepare your collection.
 - Reshelve items on carts, in classrooms, on display, etc.
 - Run a Copy List by Status, selecting Missing from the list. If you find any "missing" items, check them in.
 - Run a Copies Without Call Numbers Report. Assign call numbers to these items. Items without call numbers do not appear on inventory reports.

 - 3. Prepare your equipment.
 - Visually inspect your PHD and charge the batteries (or have extra disposables on hand).
 - Load the PHD application. This will ensure that the correct version is loaded and serve to verify that a valid connection exists between the PHD and the application.
 - Erase any pre-existing scans in the PHD.
 - Prepare remote batch disks and portable computers (if using).
 - Format floppies for saving downloaded inventory files (if not using the hard drive).

 - 4. Make sure you have a current backup of your database.

 - 5. Run Begin Inventory.

Specify whether you want to run a full or partial inventory. You cannot have more than one inventory (full or partial) open at a time. You must finalize one before beginning another.

If you select to perform a partial inventory, only Available copies within the specified call number range become Unmarked; copies outside the range remain Marked.

Important: The Begin Inventory process cannot be canceled and requires exclusive database access. No other Follett applications may be open at any workstation except for the search modules, such as OPAC and WebCollection Plus. Once this unmarking process is complete, normal circulation and cataloging activities can resume.

 - 6. Review the Inventory Statistics at the bottom of the window.
 - Copies Marked are those currently checked or loaned out, on hold, at the bindery, lost, or having a circulation type of *NC.
 - Copies Unmarked are those that need to be inventoried.
 - Copies Missing are those that became missing in previous inventories or changed to missing in Cataloging.
-

Steps for inventory

7. Enter all the Unmarked copies in your collection into Inventory. Use the schedule you created in step 1 as a guide. You can use any combination of the following inventory methods:
- Scan copies directly into the Inventory main window.
 - Scan copies using a PHD.
 - Use a portable computer to collect inventory scans.
- Remember to:
- Save the inventory file (scans) when prompted. Use a different file name each time.
 - Erase the scans from the PHD after they are downloaded, processed, and saved to file.
 - Charge the PHD every night.
 - Back up your database every night, especially if you are entering barcodes directly in the main window where you cannot create an inventory file to save.
- Note:** Normal library activities, such as adding new items to your collection and circulating items, can be done while inventory is open.
8. Periodically, run an Inventory List by Call Number for Unmarked items. Select the range of call numbers you just scanned. Review this report to determine if you have missed any items, shelves, or sections. Also, right before finalizing your inventory, run this report, selecting your entire call number range, and review it thoroughly.
9. Run Finalize Inventory. Any unmarked copies will be made missing.
- Important:** The Finalize Inventory process cannot be canceled and requires exclusive database access. Please make sure that OPAC or WebCollection Plus are the only Follett Software programs running on any library workstation.
10. Print an Inventory List that shows your Missing items.
- Note:** If you discover that you missed a section of your library after finalizing your inventory, you can open a partial inventory, specifying the skipped range of call numbers. Alternatively, you can go back and reopen the last inventory. For more information, see "Resetting Missing copies" on page 231.
-

Starting and getting around in Inventory

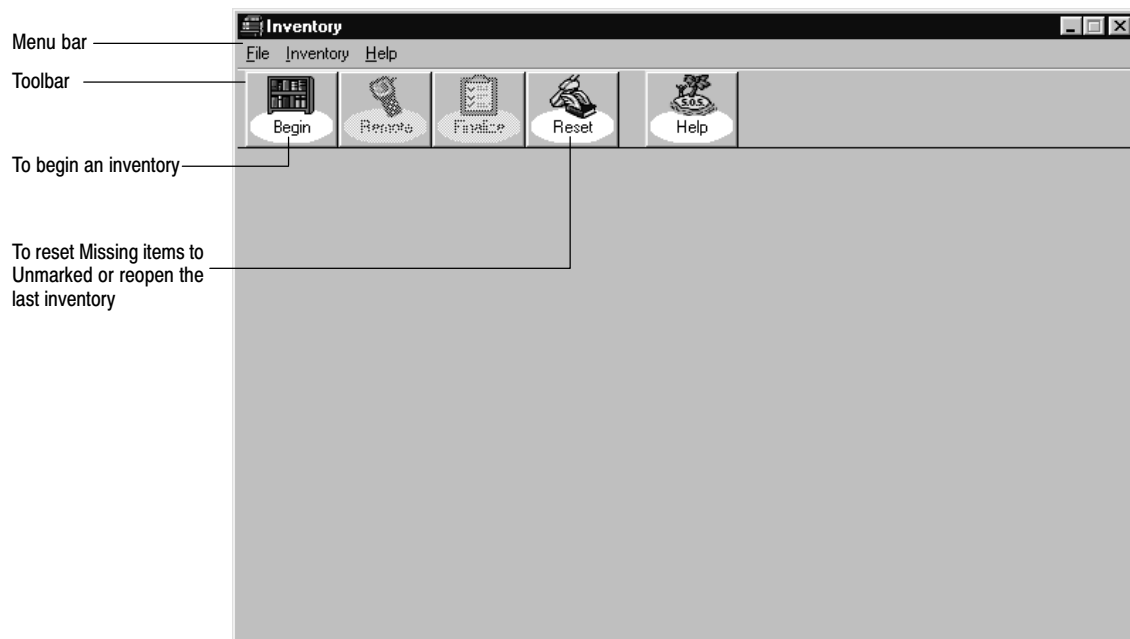
From the computer desktop, open the Follett Applications folder and double-click the Inventory icon.

Note: You can also access the Follett Applications menu from the Windows Start | Programs menu or from the Mac OS Apple menu.

If you are using the password option for Circulation Desk from System Setup's Site setup (see page 41), a password dialog appears. (Inventory and Circulation Desk share the same password.) Enter the Circulation Desk password (by default **CHECKITOUT**) and click OK.

Note: If you are starting Inventory before Circulation Desk at the beginning of the day, Inventory must perform the daily housekeeping tasks, which may generate a Daily Holds Processing exception report. For more information, see "Starting Circulation Desk" on page 115.

When Inventory starts, the main window appears. The following graphic shows the Inventory main window as it appears before an inventory is begun:



From the menu bar, you can access each of the Inventory functions and help:

- **File**—Contains the command used to close Inventory.
- **Inventory**—Contains all Inventory commands that appear on the toolbar.
- **Help**—Contains the commands used to access the help topics and glossary. From the About dialog, you can see product information for the application, the current number of patrons, titles, and copies in the system, and run the Circulation Statistics and System Information Reports (see Chapter 39, "System reports").

Notes

Chapter 20 Taking inventory of your collection

This chapter provides detailed instructions for the entire inventory process, including the different methods of entering items into inventory. You'll also learn what to do if you finalized inventory too soon and how to indicate that an item is missing without running an inventory.

Note: If you are taking inventory of your collection for the first time, we recommend that you read Chapter 19, "Inventory basics."

Beginning an inventory

Before you start the Begin Inventory process, make certain that you've completed the necessary preparations (see "Preparing for inventory" on page 210).

Important: The Begin Inventory processing cannot be canceled and requires exclusive access to the database. While it is running, no other Follett applications may be open at any workstation except for the search modules, such as OPAC and WebCollection Plus. Once the Begin Inventory processing is complete, normal activities can resume.



To start an inventory, from the Inventory main window, click Begin or select Inventory | Begin Inventory. From the Begin Inventory dialog, select whether you want to run a full or a partial inventory:

To inventory your entire collection, select this option.

To inventory a particular section of your library, select this option, and then click Starting at and Ending at to specify the call number range you want to inventory.

 A screenshot of the 'Begin Inventory' dialog box. The dialog has a title bar with 'Begin Inventory' and a close button. Inside, there are two radio button options under the heading 'Partial or Full Inventory': 'Full Inventory' (which is selected) and 'Partial Inventory by Call Number'. Below these options are two text input fields labeled 'Starting at' and 'Ending at'. On the right side of the dialog, there are three buttons: 'Begin', 'Cancel', and 'Help'.

After making your selection, click Begin. Once you've confirmed your inventory choice, the Begin Inventory progress dialog appears. When processing is

complete, close the progress dialog. The Inventory main window now allows you to enter barcode scans directly, and enables all of the other Inventory options:

This information only appears when a partial inventory is in progress.

To enter inventory data from a PHD or data file, see pages 221 and 227, respectively.

Shows the number of copies accounted for (Marked), that need to be accounted for (Unmarked), and that were Missing when you began this inventory.

Note: If you're running a partial inventory, the copies outside the inventory range are included in the Copies Marked and Copies Missing totals.

Entering copies into Inventory

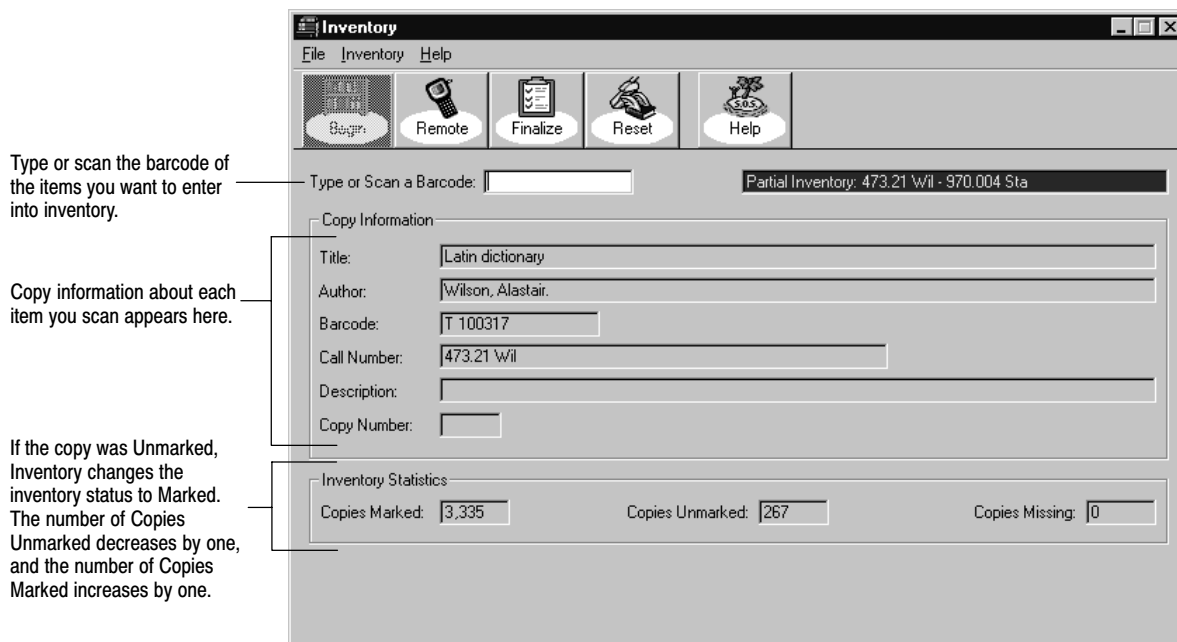
Now that Inventory has assigned the appropriate inventory status to each item in your collection, your goal is to inventory every Unmarked item. There are three ways to enter the barcodes into Inventory. You can use any combination of these three methods to inventory your collection:

- Enter copy barcodes directly into the Inventory main window. This method requires that you bring the books from your shelves to a workstation with access to the Inventory module. For more information, see “Entering copies directly into the Inventory main window” on page 219.
- Scan copy barcodes with a PHD and process the data at a workstation. Perhaps the fastest and most efficient method is to go straight to the shelves and scan the copies with a PHD. If you scan the items as you find them on the shelf, you can generate a list of items that are shelved out of order when you process the data. For more information, see “Using a PHD to inventory your collection” on page 221.
- Enter copy barcodes from a remote inventory data file created on a portable computer or laptop. The portable computer can be moved throughout the library to take inventory at the shelves. At the shelves, scan or type the barcodes into a remote inventory data file using the Remote Batch Disk utility. Once you complete a section of the library, the data file you have created and saved to a remote batch disk can be processed at your circulation

or cataloging workstation. This method lets you use multiple, non-networked computers for taking inventory. If you add items to the data file as you find them on the shelf, you can generate a list of items that are shelved out of order when you process the data. For more information, see “Using a portable computer to inventory your collection” on page 223.

Entering copies directly into the Inventory main window

When the Begin Inventory processing is complete, the Inventory main window allows you to enter items directly into inventory:



Note: At the Inventory main window, if a scanned item is checked out, Inventory checks in the item.

The following table lists the messages that might appear after scanning a barcode at the Inventory main window:

Inventory messages

| Message | Cause |
|---|--|
| Barcode does not exist. | The symbology of the barcode you scanned matches the symbology defined in System Setup, but the barcode does not correspond to an item in your collection. Also called Inactive. |
| Barcode . . . is not a valid copy barcode. | The symbology of the scanned barcode does not match the symbology defined in System Setup. Also called Invalid. |
| Copy . . . has been checked in. It was checked out to . . . | This message appears if the scanned barcode corresponds to an item that has a copy status of Checked Out. Inventory checks in the item and the inventory status remains Marked. |


Inventory messages (Cont.)

| Message | Cause |
|---|--|
| ... fine has been assessed to ... | This message appears if the scanned barcode corresponds to an item that has a copy status of Checked Out and is overdue. Inventory checks in the item and generates a fine. The inventory status remains Marked. |
| ... paid a fine for the lost book and will be credited with a refund of \$... | If a patron pays a fine for a lost copy, and the copy is later checked in when you inventory the item, Inventory generates a refund for the amount paid when the item is checked in. See also: For more information about paying refunds, see "Giving refunds" on page 161. |
| Temporary ... cannot be deleted because there is a fine on it, or there is a hold. Do not reuse barcode ... | The copy you inventoried is a temporary copy. Since there are fines or holds pending on this copy, Inventory cannot delete the temporary title or its copy. The temporary title and copy will be deleted when the fine or hold has been addressed. See also: For more information about temporary titles and their copies, see "Adding a title during a checkout" on page 139. |
| Temporary ... deleted. You can now reuse barcode ... | The copy you inventoried is a temporary copy. Since there are no fines or holds pending on this copy, Inventory deletes the temporary title and its copy. See also: For more information about temporary titles and their copies, see "Adding a title during a checkout" on page 139. |
| This copy has been missing since ... | The copy being inventoried was not accounted for during the inventory for the specified year. The copy status changes from Missing to Available and the inventory status changes from Missing to Marked. |
| This copy of ... is on hold for: ... | This message appears when you inventory a copy that fulfills a hold. Since the copy was checked out, Inventory checks it in for you. You should place the copy on the hold shelf and send the patron a Hold Notice, or delete the hold if no longer applicable. See also: For more information about generating a Hold Notice, see "Generating Hold Notices" on page 553. |
| This copy was at the bindery. | The copy being inventoried was at the bindery. Since you probably keep track of copies you send to the bindery, you should update your paperwork. The copy status changes from At The Bindery to Available and the inventory status remains Marked. |
| This copy was loaned out. Please update your records. | The copy being inventoried was loaned out to another library. Since you probably keep track of copies you loan to other libraries, you should update your paperwork. The copy status changes from Loaned Out to Available and the inventory status remains Marked. |
| This copy was lost. | The copy being inventoried was reported lost by a patron. The patron was probably charged a lost copy fine. A message may appear if a refund is generated. The copy status of the item changes from Lost to Available and the inventory status remains Marked. |

Using a PHD to inventory your collection

Using a PHD to inventory your collection eliminates the extra work of bringing the books to a workstation, thereby decreasing your overall inventory time. If you scan the items in the order you find them on the shelves, Inventory can check your shelf order when you process the data.

Before you start scanning, make sure to check the batteries in your PHD. We recommend that you have extra batteries on hand in case the battery charge runs low while collecting inventory scans:

- The PHD+, PHD+ II, and PHD Laser+ will alert you to a low battery charge with three beeps and a LOW BATTERY message.
- A charge symbol () in the lower left-hand corner of the PHD Dolphin+ display indicates the charge level of the main battery. The symbol blinks when the battery is low.

If you have not used your PHD since last year, or if you borrowed your PHD from another school, be sure to load the PHD application (see page 42) before scanning barcodes.

Important: We recommend that you process your scans as soon as possible. If you continue to circulate during an inventory, an item you scanned may be checked out before you process the remote inventory data from the PHD. Processing the scans will *not* check in the items in the PHD file. It will, however, generate an exception report indicating the items that already have a marked status. You can use this report to review the shelves for items that have a status of checked out, loaned out, at the bindery, on hold, or lost. Re-scan these items directly in the Inventory main window to correct the copy status.

1. With your PHD, scan the barcodes of the items you want to enter into inventory. For instructions on collecting inventory scans with the PHD+, PHD+ II, or PHD Laser+, see “Collecting inventory, copy, or patron data” on page 663. To collect inventory scans with a PHD Dolphin+, see “Collecting inventory scans” on page 676.

Note: Make sure to erase any existing scans before you begin. To erase scans from a PHD+, PHD+ II, or PHD Laser+, see page 664. For a PHD Dolphin+, see page 679. You may need to collect and process inventory scans several times before your inventory is complete.

When you finish collecting scans, connect your PHD to your computer. See the manufacturer’s documentation or Appendix E, “Using a PHD+, PHD+ II, or PHD Laser+,” or Appendix F, “Using a PHD Dolphin+,” for instructions.

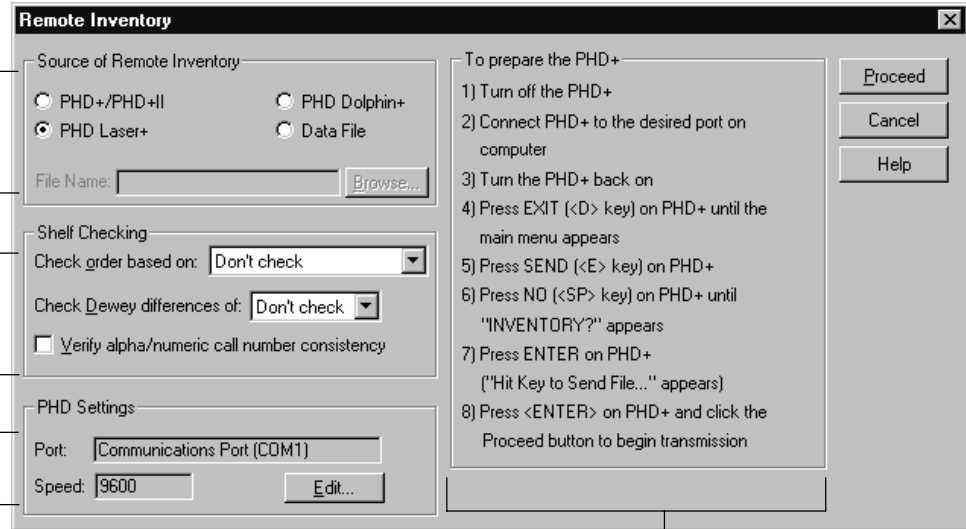


- To transfer the scans from the PHD, from the Inventory main window, click Remote or select Inventory | Remote Inventory. The Remote Inventory dialog appears:

Select the PHD model you're using.

To identify items that are shelved out of order, set the Shelf Checking options. For more information, see the following table.

To change the transfer settings, see step 3.



Warning: To protect your equipment, make sure you turn off your PHD and computer before connecting or disconnecting the PHD.

These instructions change based on the PHD you choose.

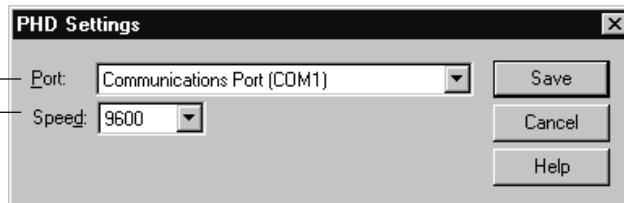
| Shelf Checking Option | Description |
|--|---|
| Check order based on | Select one of these options to make sure that copies on the shelf are in call number order. You can select how thorough you want the checking to be: by call number alone; by call number then by author; or by call number, then author, and then title. |
| Check Dewey differences of | Select one of the Dewey differences to discover incorrectly shelved Dewey range titles. This option also helps you verify that you didn't skip a shelf when scanning books. |
| Verify alpha/numeric call number consistency | Select this check box to make sure that consecutively scanned copies have similar call number components. This option alerts you to those items on the shelf that are not in consistent call number order. |

Note: For examples of exception messages that could be generated when you select these options, please refer to the sample Remote Inventory exception report on page 228.

- After selecting your options, select the PHD model you're using. If you don't need to change the transfer settings, skip to step 4. Otherwise, choose Edit. The PHD Settings dialog appears:

Select the port you use to attach your PHD to your computer, and then...

...select the highest speed available for that port. The PHD Dolphin+ only communicates at a speed of 9600 baud.



Set the port and speed for your PHD, and click Save.

4. Once you've selected the correct PHD model and adjusted the PHD settings as desired, simply follow the instructions displayed in the window.

After the data is processed, a message appears asking if you want to save the remote inventory data (barcode scans). We recommend that you always save your remote inventory data until inventory has been completed.

Choosing No removes the temporary inventory file from your computer but does not affect your processed data. To save your remote inventory data, select Yes. On the Save As dialog, enter a file name and use **txt** as the extension. The remote inventory data file's default location is in FOLLETT\CC40\TEMP\.

Note: If you need to, you can reprocess the scans using the instructions under "Processing the remote inventory data file" on page 227.

When you click Close from the Remote Inventory progress dialog, Inventory generates an exception report to alert you to items that may require follow-up (see "Interpreting the Remote Inventory exception report" on page 228). We recommend that you use Print Preview to view all of your Remote Inventory exception reports. After previewing them, you may want to print or save your exception reports to facilitate following up on the items indicated on the report.

Important: Before you begin collecting additional scans, remember to erase the previous scans from your PHD. To erase scans from a PHD+, PHD+ II, or PHD Laser+, see page 664. For a PHD Dolphin+, see page 679.

Using a portable computer to inventory your collection

In addition to entering copies directly into the Inventory main window and using a PHD, it is possible to collect inventory data on almost any portable PC or Macintosh. After collecting the data and saving it to floppy disk, you can process it at any Inventory workstation. You can repeatedly collect and process inventory data with remote batch disks until you have processed your entire collection.

To collect scans with a portable computer, you'll need a PC, Macintosh, or laptop with a 3 1/2" floppy disk drive, a barcode scanner (if you'll be using one), and a movable cart for the computer. You'll also need a number of formatted high-density diskettes to create remote batch disks or files (see the following sections for instructions).

Note: If you intend to use a laptop with a scanner, the laptop must have a keyboard port and an external keyboard. Follow the instructions for the operating system of the laptop.

The following sections contain procedures for Windows (page 223), Mac OS (page 225), and DOS (page 226) workstations.

Windows workstations

If the operating system of the computer is Windows 95, 98, NT, or 2000, use the following instructions for creating remote batch disks and collecting scans.

To make disks for use on the portable computer, the program files must be copied onto them. Use the following steps to create as many remote batch disks as you'll need to inventory your collection. We recommend that you do not exceed 1500 scans on any one remote batch disk.

1. Insert a blank, formatted, high-density disk into the floppy drive of a Circulation Plus workstation. From the Windows Desktop, double-click the My Computer icon. The My Computer dialog appears.
2. From the My Computer dialog, locate and open the FOLLETT\CC40\WCIRC folder. (The default location is C:\Program Files.)
3. Copy the following two files from WCIRC to each floppy disk: RMTBAT.EXE, RMTBAT.HLP.
4. Close the My Computer dialog.

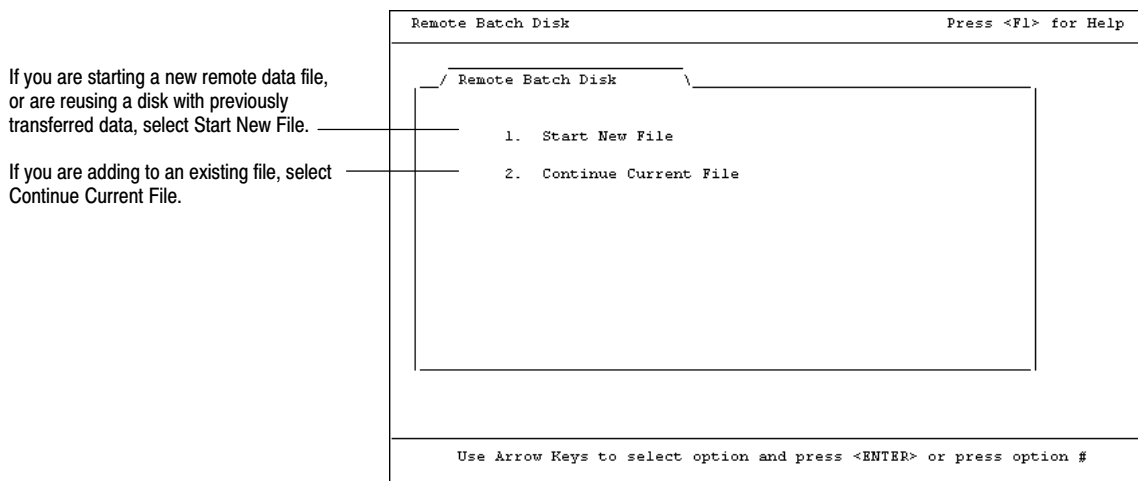
Note: Remember to label your remote batch disks.

With the portable computer turned off, move it to the section you'll be scanning and connect the scanner. Turn the computer on. After it boots up, insert the floppy disk made with the above directions. From the Windows Desktop, double-click the My Computer icon. Then double-click the 3 1/2 Floppy icon, and then double-click RMTBAT.EXE. The Remote Batch Disk utility will start.

Warning: To protect your equipment, turn off your computer before moving it or connecting or disconnecting the scanner.

Running the Remote Batch Disk utility

The main screen appears:



From the Barcode Entry screen, type or scan the copy barcode for each item you want to enter into inventory:

As you enter items, the number of records (scans) in the data file increases, as does the number of bytes.

Note: We recommend that you do not exceed 1500 records on a remote batch disk.

The different values in "Records in file" and "Records this session" show that you are adding to an existing data file.

```

Remote Batch Disk | Barcode Entry | Press <F1> for Help
-----|-----|-----
Barcode.....
Last barcode:      T 1596
Records in file:   73
Bytes in file:     600
Records this session: 59
Bytes this session: 472
Total disk space: 1457664
Disk space free:  970240
Resource pct. free: 66

Options |
-----|-----|-----
<F2> ----- <F5> ----- <F8> -----
<F3> ----- <F6> ----- <F9> -----
<F4> ----- <F7> ----- <F10> -----

Enter barcodes. Press <ESC> to return to menu.

```

After scanning the section, press **ESC** to close the Barcode Entry screen, and press **ESC** again to exit the Remote Batch Disk utility. The remote inventory data file is stored on the remote batch disk in a file named DATA.TXT. Remember to mark each remote batch disk with the range of call numbers it contains.

Proceed to "Processing the remote inventory data file" on page 227 to process the remote batch disk.

Mac OS workstations

Warning: To protect your equipment, turn off your computer before moving it or connecting or disconnecting the scanner.

Use the following instructions to create the remote batch files and collect scans on a Mac OS workstation:

1. On your Macintosh portable computer, open a word processing application and create a new file.
2. The first line of the file must be 5 digits. These digits represent the number of scans in the file. The number does not need to be exact. It is perfectly acceptable to enter **00000**.

Note: The number entered only affects the status bar in the Remote Inventory progress window. If you choose a large number, possibly 10000, and enter only 500 scans, the progress bar may only show 20% completion although the entire file has been successfully loaded.

3. The second line of the file must be 7 digits. It is the number of bytes in the file. Again, it is acceptable to enter **0000000**.
4. The third line must be INVENTORY. It must be uppercase.
5. The scans begin on the fourth line. They can be entered by scanning or by typing. If typing, they must be typed as they would appear if scanned.

Example: A Follett Classic barcode, T 12345, is scanned as T<space>0012345. If you type in this barcode, you must type in **T<space>0012345** and press the **Return** key before entering the next barcode.

6. After you have scanned or typed the barcodes you want to include in this remote batch file, you must save the file as a TEXT file. Inventory uses ASCII text only; it cannot read other word-processor-specific formats, such as ClarisWorks or Word. Save the file to a floppy disk that can be inserted in your Inventory computer for processing.

The following is an example of a remote batch file created with the steps above:

```
00000
0000000
INVENTORY
T 0012345
T 0012346
T 0012347
T 0012348
T 0012349
```

Proceed to “Processing the remote inventory data file” on page 227 to process the remote batch disk.

DOS workstations

Use the following steps to create as many bootable remote batch disks as you’ll need to inventory your collection on older computers:

1. Insert a blank, formatted, high-density disk into the floppy drive of a Circulation Plus workstation. From the Windows Desktop, double-click the My Computer icon. The My Computer dialog appears.
2. Copy the system files to the disk. Select the 3 1/2 Floppy drive (usually A:) and choose File | Format. From the Format dialog, copy the system files to the disks you’ll be using, and then close the Format dialog.
3. From the My Computer dialog, locate and open the FOLLETT\CC40\WCIRC folder. (The default location is C:\Program Files.) Copy the following files from WCIRC to each floppy disk, and then close the My Computer dialog:
 - RMTBAT.EXE
 - RMTBAT.HLP
 - UKREG.COM
 - UKMIC.COM
4. Create an AUTOEXEC.BAT file on each disk. From the taskbar, select Start | Programs | MS-DOS Prompt. From the DOS prompt, switch to the floppy drive by typing **A:**.
5. To create the file, type **COPY CON AUTOEXEC.BAT**. Press **ENTER** to move the cursor to the next line. Type **CLS** and press **ENTER**. The remainder of the file depends on the type of scanner you use:
 - Keyboard interface scanner: Type **RMTBAT** and press **ENTER**. To complete the file, press **F6** (which inserts a ^Z) and press **ENTER**.

- Game card interface scanner: Type either **UKMIC** (IBM Micro-Channel computers only) or **UKREG** (any other game card interfaced scanner) and press **ENTER**. Type **RMTBAT** and press **ENTER**. To complete the file, press **F6** (which inserts a ^Z) and press **ENTER**.

After all your disks are ready, type **EXIT** to close the MS-DOS window.

With the portable computer turned off, move it to the section you'll be scanning and connect the scanner. Insert a remote batch disk into the floppy drive and turn on the PC. The Remote Batch Disk utility starts automatically.

Warning: To protect your equipment, turn off your computer before moving it or connecting or disconnecting the scanner.

To collect scans in the Remote Batch Disk utility, see "Running the Remote Batch Disk utility" on page 224.

Processing the remote inventory data file

After you collect your remote inventory data (see the preceding sections), you need to process the data file. These instructions can also be used to process a file of saved PHD scans (see page 223).

To process the data, from the Inventory main window, click Remote or select Inventory | Remote Inventory. The Remote Inventory dialog appears:



To process an inventory data file, select Data File. Click Browse to locate the file you want to process.

Select how you want to identify items that are out of order on the shelf. For more information, see the table on page 222.

After selecting your data file and shelf checking options, click **PROCEED**. The Remote Inventory progress dialog appears.

When the data has been processed, Inventory generates an exception report to alert you to items that may require follow-up (see the next section, "Interpreting the Remote Inventory exception report"). We recommend that you use Print Preview to view all of your Remote Inventory exception reports. After previewing them, you may want to print or save your exception reports until inventory is complete.

Interpreting the Remote Inventory exception report

The Remote Inventory exception report alerts you to items that may require some follow-up on your part. Only Missing items are checked in and made Available when you process remote inventory data. Inventory does not change the copy status of items that are Checked Out, On Loan, At The Bindery, On Hold, or Lost. The exception report is available from the Exception Reports folder inside of your Follett folder.

For example, if you scanned the items in your check-in drop box, you would want to check in those items in Circulation Desk using the barcode listed on the Remote Inventory exception report. If there is a problem on the exception report that you are unable to resolve, contact Follett Software’s Technical Support department.

The Remote Inventory exception report always includes the first and last barcode you scanned and ends with a summary of the copies that were processed. The following graphic contains a sample Remote Inventory exception report with several shelf order errors:

The report header includes the shelf checking options you selected.

```

Remote Inventory
10/13/2000 @ 2:53pm

File Name: C:\Program Files\Follett\CC40\TEMP\PHD00001.TXT
Check order based on: Call number
Check Dewey difference of: 100
Verify call number consistency: Yes
-----
First:    428.1          Steckler, Arthu  101 more words  T 21104
-----
Previous: E SPA        Spanjian, Beth.  Baby Brontosaur  T 88011
Current:  E SPA        Spanjian, Beth.  Baby Stegosauru  T 88010
Next:    796.9 Lyt     Lyttle, Richard  Basic hockey st  T 887766
WARNING: Call number of current copy is inconsistent with call number of
next copy.
-----
Previous: E SPA        Spanjian, Beth.  Baby Stegosauru  T 88010
Current:  796.9 Lyt     Lyttle, Richard  Basic hockey st  T 887766
Next:    780 Rac       Rachlin, Ann.    Beethoven        T 48973
WARNING: Shelf is out of order. Current copy has a Call Number that is
greater than the next copy.
-----
Previous: 796.9 Lyt     Lyttle, Richard  Basic hockey st  T 887766
Current:  780 Rac       Rachlin, Ann.    Beethoven        T 48973
Next:    973.929 Cwi    Cwiklik, Robert  Bill Clinton :   T 2000
WARNING: Difference between call numbers of current and next copy is
greater than the selected difference of 100.

```

To help you locate the copy on the shelf, the exception report provides you with the call number, author, title, and barcode for the previous, current, and next copy.

The following table lists messages that may appear on the Remote Inventory exception report:

Remote Inventory exception messages

| Exception message | What it means |
|---|--|
| INACTIVE: <barcode number> | Inventory couldn't find a match for the barcode in your database. First, try rescanning the barcode. Since the title probably already exists, you may need to add a new copy for the title. For more information, see Chapter 24, "Working with copies." |
| INVALID: <barcode number> | Inventory encountered a barcode that does not match your site's barcode symbology. First, try rescanning the barcode. You may want to verify that your barcode symbology setup is valid for the barcodes you are using in your collection. For more information, see "Setting up your barcode symbologies" on page 37. |
| WARNING: Call number of current copy is inconsistent with call number of next copy. | Based on the selection you made in the Remote Inventory dialog under Shelf Checking, Inventory determined that the current item has a call number that is inconsistent with the next copy. |
| WARNING: Current copy had been missing since <year> and has been set to available. | Inventory marked an item that had a copy status of Missing and changed the copy status to Available. |
| WARNING: Current copy is at the bindery. | Inventory marked an item that has a copy status of At The Bindery. If you want to change the copy status to Available, you must scan the item in the Inventory main window. |
| WARNING: Current copy is checked out to <patron's name>, Barcode: <patron's barcode>. Due Date: <date>. | Inventory marked an item that has a copy status of Checked Out. This message probably indicates that the item has been checked out by a patron before you processed the remote inventory data. This item should not be checked in unless you are certain that the item is not currently checked out. |
| WARNING: Current copy is loaned out. | Inventory marked an item that has a copy status of Loaned Out. If you want to change the copy status to Available, you must scan the item in the main Inventory window. |
| WARNING: Current copy is lost. | Inventory marked an item that has a copy status of Lost. If you want to change the copy status to Available, you must scan the item in the Inventory main window. |
| WARNING: Current copy is on hold for <patron's name>, Barcode: <patron's barcode>, Phone Number: <number>, <Location 1>, <Location 2>. | Inventory marked an item that has a copy status of On Hold. If the item is not on the hold shelf, we recommend that you place it there and send the patron a Hold Notice. For information about printing Hold Notices, see "Generating Hold Notices" on page 553. |

Remote Inventory exception messages (Cont.)

| Exception message | What it means |
|---|---|
| WARNING: Difference between call numbers of current and next copy is greater than selected difference of <Check Dewey option>. | Based on the selection you made in the Remote Inventory dialog under Shelf Checking, Inventory determined that the Dewey number span between two consecutive items is greater than the value you specified. |
| WARNING: Shelf is out of order. Current copy has a <Check order option> that is greater than the next copy. | Based on the selection you made in the Remote Inventory dialog under Shelf Checking, Inventory determined that the indicated item is not shelved in the proper order. |

Finalizing an inventory

After you enter a barcode for every Unmarked item that you can locate, you are ready to finalize your inventory. Make sure to:

- Check the Inventory Statistics at the bottom of the Inventory main window.
- Print an Inventory List by Call Number to identify any Unmarked items. This lets you see if any sections or shelves were missed.
See “Generating an Inventory List by Call Number” on page 558.

During the Finalize Inventory processing, Inventory changes the inventory status of each remaining Unmarked item to Missing and records the year. After you finalize your inventory, the number of items identified as Marked and Missing will equal the total number of records in your system.

Important: To finalize your inventory, you must have exclusive access to the database. This means that no other Follett applications may be open at any workstation except for the search modules, such as OPAC and WebCollection Plus.



To finalize an inventory, from the Inventory main window, click Finalize or select Inventory | Finalize Inventory. A message appears asking if you are sure you want to finalize your inventory. To continue, click Yes. The Finalizing Inventory progress dialog appears.

When the finalizing process is finished, check the number shown for Copies Missing and close the Finalize Inventory progress dialog. If you are certain you inventoried your entire collection, see the next section, “Printing reports of your Missing items.” However, if you think you missed a section of your collection, see “Resetting Missing copies” on page 231.

Printing reports of your Missing items

After you finalize your inventory, print an Inventory List by Title and an Inventory List by Call Number that show your Missing items. The call number report will not show items that have a copy status of Lost because they have an inventory status of Marked. If you also want to see a list of your Lost items, you can print a Copy List by Status and select Lost as the copy status.

If you finalized too early, you may see a long list of items on the Inventory List by Call Number for Missing items. To correct your inventory results, see the following section.

See also: For information about printing the Copy List by Status and Inventory List, refer to Chapter 38, "Circulation reports."

Resetting Missing copies

If you finalize your inventory too soon, don't panic. Even after you finalize, you can reopen your last inventory, which resets the Missing items from only that inventory to Unmarked. If you don't discover your error immediately, you can also reset the Missing items from a specific year or even reset all the Missing items in your collection. You can then scan all of the items you missed into Inventory and finalize your inventory again.

Warning: Do not reset Missing items until you have finalized at least one inventory.

Important: The Reset Missing process cannot be canceled and requires exclusive access to the database. No other Follett applications may be open at any workstation except for the search modules, such as OPAC and WebCollection Plus.



To reset the inventory status of Missing items to Unmarked, from the Inventory main window, click Reset or select Inventory | Reset Missing. The Reset Missing Copies dialog appears:

To reset all the items that were marked missing in a specific year, select this option and enter the year.

To reset every Missing item in your collection, select this option.

To reopen your last full or partial inventory and reset the items made missing in the that inventory, select this option. If an inventory is already in progress, this option isn't available.

After selecting your option, click Reset. The Resetting Missing Copies progress dialog appears. Inventory changes the inventory status of qualified items from Missing to Unmarked. When the process is complete, close the progress dialog. Inventory is now ready for you to enter the items you missed. Once you enter all your Unmarked items, re-finalize your inventory.

Marking items Missing outside an inventory

Occasionally there will be items that are missing from the shelf but have a copy status of Available and an inventory status of Marked. If you're not in the middle of an inventory, you can still change the inventory status of these items to Missing in Cataloging.

Changing an item's inventory status from Marked to Missing also changes the copy status from Available to Missing. For information about changing an item's inventory or copy status in Cataloging, see Chapter 24, "Working with copies."

Note: You can only change the inventory status of items that have a copy status of Available. To change the copy status of a Lost or At the Bindery item to Available, you must check in the item in Circulation Desk.

Deleting Missing items

If you are satisfied that your inventory is correct, you can delete the Missing copies from your database. Or, if you prefer, delete only those copies that have been missing for, say, three years. For instructions on the Global Delete Missing Copies process, see page 330.

Chapter 21 Cataloging basics

This chapter provides a brief introduction to the Cataloging module and MARC records. You'll also find instructions for customizing the Cataloging toolbar, setting up security, searching different databases for the records you want, and adding, deleting, or printing out MARC records.

Cataloging 101

Cataloging helps you maintain your library materials database. From Cataloging, you can add and update individual MARC records and access the global and PHD maintenance features. You also use Cataloging to import and export MARC records.

Your library database can contain two types of MARC records: bibliographic and authority. Each type of MARC record has a very specific role.

A bibliographic record represents a physical item in your library's collection. In addition to the title, author, and subjects, a bibliographic record also describes the item and contains information about each copy of the item (for example, call number, price, and acquisition date).

An authority record contains the preferred form of names, uniform titles, series titles, and subject headings. It may also contain variant, unauthorized, or related headings, and a list of sources consulted in the process of deciding upon the authorized heading and its variant and related forms. Cataloging uses authority records to create cross-references that help patrons achieve success in searching.

Using MARC bibliographic and authority record formats

Today, many new books come with MARC records that you can import (see Chapter 25, "Importing MARC records"). But that won't work for donated books, audiovisual equipment, or items that have been on your shelves for years. In the cases where you have to create your own MARC records, you'll want them to be usable and contain the needed information.

Cataloging provides you with two options for adding and editing bibliographic records: the Easy Editor and the MARC Editor.

The Easy Editor lets users with little or no knowledge of the MARC standard perform routine cataloging tasks. In the Easy Editor, simple prompts identify the information needed to catalog a title. The MARC Editor lets more advanced users take full advantage of the detail and flexibility of the MARC standard for both bibliographic and authority records.

Note: Although you selected a preferred editor in System Setup, both editors are always available from Cataloging's File menu (see "Setting up miscellaneous Cataloging options" on page 55).

The details of the MARC standard are beyond the scope of this guide. However, if you would like additional information about the MARC bibliographic or authority record standard, we recommend the following publications:

| Document | Description | Available from: |
|--|---|--|
| <i>MARC Bibliographic and MARC Authority Format Guides</i> | Two separate desktop flip-charts. One contains the more common MARC bibliographic tags, in numeric order, with examples. The other covers creating authority records to build cross-references. | Follett Software Company 1391 Corporate Drive McHenry, IL 60050-7041 (800) 323-3397 |
| <i>Understanding MARC Bibliographic</i> | Discusses what MARC is and why it's important. Published by the Library of Congress in conjunction with Follett Software Company, this free pamphlet contains a wealth of information. | Follett Software Company 1391 Corporate Drive McHenry, IL 60050-7041 (800) 323-3397 Or online at: http://lcweb.loc.gov/marc |
| <i>MARC 21 Format for Bibliographic Data</i> | Defines the codes and conventions (tags, indicators, subfield codes, and coded values) in MARC bibliographic records. | The Library of Congress Washington, DC 20540-4020 |
| <i>Anglo-American Cataloging Rules, 2nd ed. (AACR2)</i> | Describes how to formulate catalog entries (titles, notes, author names, and so forth). | Follett Library Resources 1340 Ridgeview Drive McHenry, IL 60050 (800) 435-6170 catalog number 00-150-M |
| <i>MARC 21 Format for Authority Data</i> | Defines the codes and conventions (tags, indicators, subfield codes, and coded values) in MARC authority records. | The Library of Congress Washington, DC 20540-4020 |

Note: In 1999, the term *MARC 21* replaced *USMARC*. This change is a result of the harmonization of the U.S. and Canadian formats.

Permanent or temporary?

You can also create new bibliographic records from Circulation Desk during checkout (see page 139). Circulation Desk gives you the option to create permanent or temporary records. What does this mean?

Most items should have permanent records, especially if you want patrons to be able to find them with keyword searches. While you can create permanent records through Circulation Desk, it's best to create all permanent records in Cataloging because you'll be able to create a more complete record. (If you're a multiuser site, you can have both modules running and switch between them.)

Titles that change frequently or have short circulation periods are good candidates for temporary records (for example, individual issues of periodicals). When the item is checked back in, the temporary record is deleted. Please note that temporary records don't generate keywords, so you and your patrons won't have that point of access. For additional information, see page 139.

Starting Cataloging

To start Cataloging, from the computer desktop, open the Follett Applications folder and double-click the Cataloging icon. You can also access the Follett Applications menu from the Windows Start | Programs menu or from the Mac OS Apple menu.

If you are using the password option from System Setup's Site setup (see page 40), a password dialog appears. Enter the Cataloging password (by default **MODTITLE**) and click OK.

If Alliance Plus is installed, you can search the contents of your Alliance Plus data sources through Cataloging. When you start Cataloging, it automatically checks your workstation and network for an Alliance Plus Online connection and any mounted Alliance Plus CDs. (To update your CD selections, select File | Refresh CDs.)

From the Cataloging main window, you can click one of the toolbar buttons to search for or add a record and to access window-specific help:



From the menu bar, you can also access the following submenus and help:

- **File**—Contains commands for adding, editing, printing, importing, and exporting MARC records. To update the Alliance Plus CDs shown in the database drop-down list after starting Cataloging, select Refresh CDs. You can also configure the Cataloging toolbar buttons, limit access to the features, and switch between the MARC Proof Sheet and the OPAC displays. Select Exit/Quit to close Cataloging.

- Edit—Contains commands for editing text and inserting diacritics in MARC records (see page 276), accessing the global and individual update and delete features, and several PHD options (see Chapter 27, “Maintaining your collection”). Individual update and PHD options aren’t available in Union Catalog Plus.
- Search—Contains the commands for all Cataloging’s searches (see page 240).
- Tag and Subfield—Contain the commands for maintaining tags and subfields in the MARC Editor (see pages 266 and 274, respectively).
- Tools—Contains the commands for setting limiters and data sources (see pages 241 and 245), updating keywords, rebuilding cross-references (see page 346), managing the Book Cart (see page 346), accessing the Titlewave and netLibrary Web pages, and launching MARC Magician (if you have it).
- Help—Contains the commands used to access the help topics and glossary. From the About dialog you can see product information, the current number of patrons, titles, and copies in the system, and run the System Circulation Statistics and System Information Reports (see Chapter 39, “System reports”).



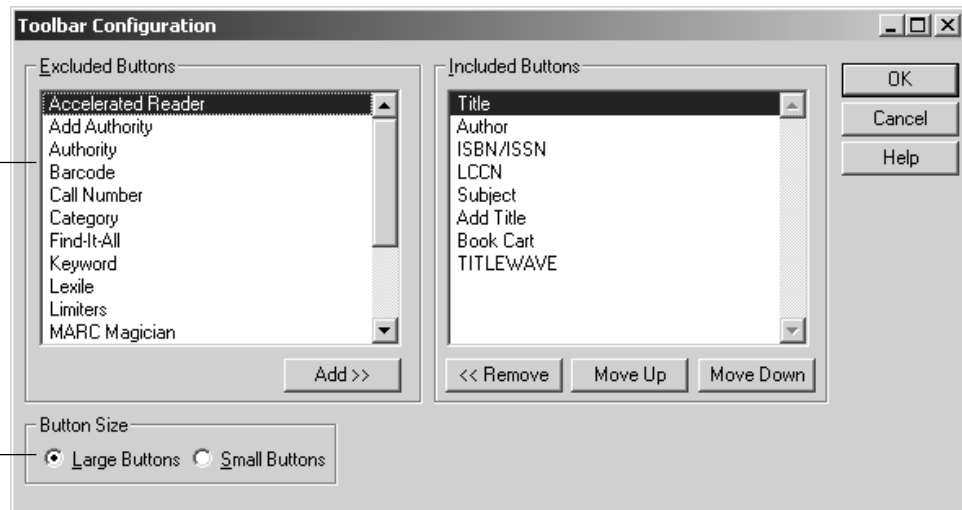
Customizing the toolbar

Do you prefer large or small buttons? Are there certain searches or features that you use often? Cataloging lets you easily change the appearance of the toolbar. To customize your toolbar, select File | Toolbar Configuration:

Use the Add >> and << Remove buttons to include and exclude buttons from the toolbar. Use the Move Up and Move Down buttons to define the order they should appear.

Any search or command button in the Excluded Buttons group box will not appear on the toolbar.

Select the button size you prefer.



The Help button does not appear in this dialog. It is always available on the toolbar.

For Union Catalog Plus: The Category and MARC Magician buttons are not available.

In addition to search buttons, there are several linking buttons:

- The Find-It-All button launches your browser and opens the Find-It-All Collection (if you have purchased a subscription) from Cataloging. From this Web page, you can search your local collection, subscription databases, and the Internet, all from the same interface.
- TITLEWAVE launches your browser and opens Follett Library Resources' TITLEWAVE Web site, where you can create collection development lists, search for individual titles, obtain the printed results to quote requests, and submit orders.
- netLibrary opens netLibrary's Library Resource Center Web site. There, you can read about their eBooks and services. If you have a netLibrary account, you can log on to create and edit user accounts, create and manage categories, set up loan periods, and generate several reports.
- MARC Magician launches that program if you have MARC Magician version 2.0 or higher installed on your workstation. In addition to launching it directly from Cataloging, you can easily transfer records between the Book Cart and MARC Magician for enhancement. For more information, see page 348. (This option is not available for Mac OS or Union Catalog Plus.)

The number of buttons that fit on the toolbar depends on the monitor's desktop area and the size of the buttons. The following table shows the maximum number of buttons that display at each standard monitor resolution.

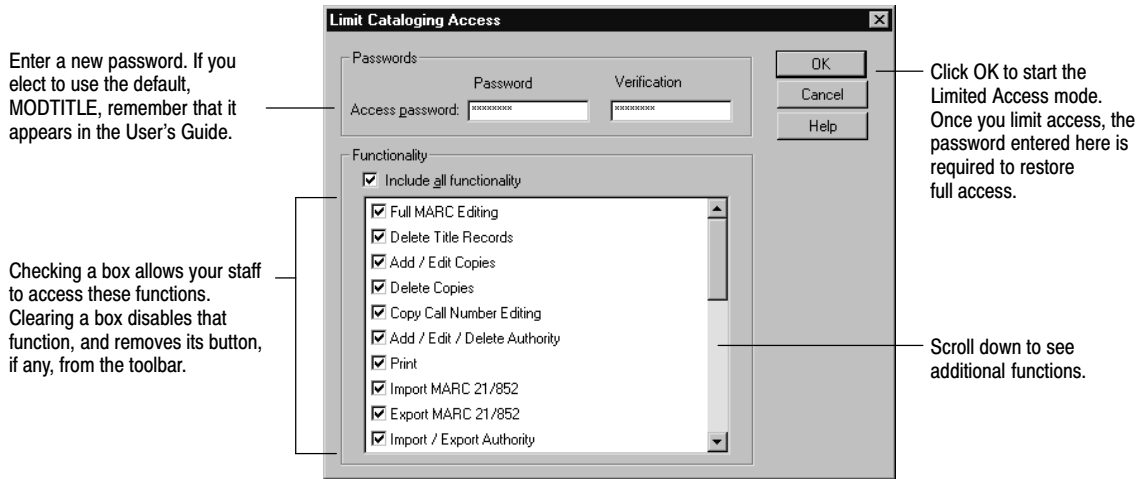
The buttons do not wrap to a second row. If you select more buttons than can be displayed, some of your buttons will not be accessible.

| Button Size | 640 x 480 | 800 x 600 | 1024 x 768 | 1280 x 1024 |
|---------------|-------------------|-----------|-------------------|-------------|
| Large buttons | 9 | 12 | 15 (14 on Mac OS) | 19 |
| Small Buttons | 15 (14 on Mac OS) | 19 | 24 | 25 |

Cataloging Security

When you want to limit the access that your student helpers or aides have in Cataloging, you can configure the individual workstations they use by following these steps:

1. From the File menu, select File | Limit Cataloging Access. The Limit Cataloging Access dialog appears:



2. To set up limited access, enter a password. The default masked password is **MODTITLE**.

Note: Because this default password appears in the User’s Guide, we recommend that you create a new Access password.

3. Clear the check boxes for the functions that you want to disable. The following table lists the effects of clearing a check box:

| Clearing this check box: | Has this effect (it also removes any toolbar button) : |
|--------------------------|---|
| Full MARC Editing | Disables File Add title MARC Disables File Edit title MARC Disables the second through fourth tabs in the Easy Editor Clicking the Edit button in the MARC Viewer or the Book Cart launches the Easy Editor, regardless of the default editor selection in System Setup |
| Delete Title Records | Disables File Delete Record Disables the Delete button in the MARC Viewer Disables the Delete Titles/Copies After Export check box on any of the Export MARC 21/852 Holdings Format dialogs Disables the Delete Title When Last Copy Deleted check box on the Delete Copies via PHD dialog |
| Add/Edit Copies | Disables Edit Update Copies via PHD Disables Edit Remove Category via PHD Disables the Add Copy and Edit Copy buttons in the MARC Viewer |

| Clearing this check box: | Has this effect (it also removes any toolbar button) : |
|-----------------------------------|---|
| Delete Copies | Disables Edit Delete Copies via PHD Disables Edit Delete Copies via Scanner Disables the Delete Copy button in the MARC Viewer Disables the Delete Titles/Copies After Export check box on any of the Export MARC 21/852 Holdings Format dialogs |
| Copy Call Number Editing | Disables the Call number text box on the Edit Copy dialog |
| Add/Edit/Delete Authority | Disables File Add Authority Disables File Edit Authority Disables File Delete Record Disables the Edit and Delete buttons in the MARC Viewer |
| Print | Disables File Print Disables Tools Book Cart Print Options |
| Import MARC 21/852 | Disables File Import MARC 21/852 Holdings Format Disables File Import MARC 21/852 Holdings Format by Barcode Disables File Import MARC 21/852 Holdings Format by Control Number |
| Export MARC 21/852 | Disables File Export MARC 21/852 Holdings Format |
| Import/Export Authority | Disables File Import MARC 21/852 Authority Format Disables File Export MARC 21/852 Authority Format |
| Toolbar Configuration | Disables File Toolbar Configuration |
| MARC Proof Sheet/OPAC View Toggle | Disables File MARC Proof Sheet Display or Disables File OPAC Display |
| Global Update Copy | Disables Edit Global Update Copy |
| Global Update Headings | Disables Edit Global Update Headings |
| Individual Update | Disables Edit Individual Update |
| Global Delete | Disables Edit Global Delete Lost Copies Disables Edit Global Delete Missing Copies Disables Edit Global Delete Subject Headings By Source Disables Edit Global Delete Tag Disables Edit Global Delete Titles Without Copies |
| Data Source Selection | Disables Tools Data Sources |
| Alliance Functionality | Disables File Refresh CDs Disables the Alliance Plus check box and drop-down list on the Data Source Setup dialog Removes any Alliance Plus CDs from the Search drop-down list |

| Clearing this check box: | Has this effect (it also removes any toolbar button) : |
|--------------------------|--|
| Update Keywords | Disables Tools Update Keywords |
| Rebuild Cross-References | Disables Tools Rebuild Cross-References |
| TITLEWAVE | Disables Tools Go to TITLEWAVE |
| netLibrary | Disables Tools Go to netLibrary |
| Limiters | Disables Tools Limiters |
| Book Cart | Disables Tools Book Cart |
| Book Cart Recon | Disables Tools Recon in the Book Cart |
| Acquisitions | Disables Orders access |

Disabling access to a function does not affect the options that you previously set in those functions.

Example: You previously checked Local Database and Alliance Plus in the Data Sources Setup dialog. If you clear the Data Source Selection in this dialog, users still have the ability to search the local and the Alliance Plus databases. They cannot, however, change those choices.

To limit access, click OK, and Yes to the confirmation message.

To restore the workstation to full operation, select File | Restore Full Access. In the password dialog, type the password you defined previously, and click OK.

Cataloging saves your password and functionality settings, allowing you to limit access easily again. Because Cataloging saves the information locally, you can set up each workstation differently.

Closing and reopening the application does not change its access mode; if you close Cataloging while access is limited, access is limited when you reopen it.

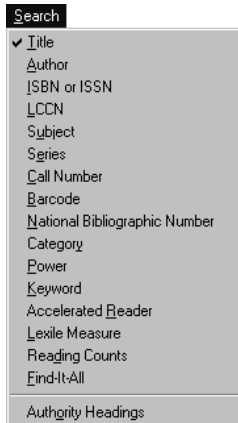
For Union Catalog Plus: If you run the site application and the union catalog application on the same workstation, you can set up their Limit Cataloging Access dialogs differently. The passwords and settings are saved in separate locations.

Finding MARC records in your collection

Almost every cataloging task starts with a search for a MARC record. Depending on which Follett applications and products you purchased, you may have several sources to search for MARC records.

Before you add a new record, it's a good idea to search your library (or union catalog) database to make certain it doesn't already exist. Duplicate titles can confuse your patrons, enlarge your database, and skew your statistics. You might also find an existing record that would require only minor modifications to meet your needs.

Try more than one type of search. Start with one of the standard numbers, such as the LCCN, ISBN, or ISSN to find a specific record. If you don't have one of these numbers, try searching by the title, author, or subject.



1. Enter your search term in the search text box. The success of your search can depend on your search term; enter as much of the search term as you can.
2. Choose Local Database from the drop-down menu to the right.
3. Select the appropriate Search menu item or button to start your search.

If your searches are not producing the desired results, make sure that you are aware of the following:

- Keyword and Power searches require a properly maintained keyword index. See “Setting up miscellaneous Cataloging options” on page 55. For more information on keyword or Power (Boolean) searches, see page 459.
- LCCN and barcode searches require an exact match (a message appears if no exact match is found). Enter the complete number and, for LCCNs, include the hyphen.

For Union Catalog Plus: When searching by barcode, you must scan or enter the barcode, and select a member site. The search results, however, list all the copies in the union catalog database for that title.

- ISBN searches of your local database do not require an exact match. For the fastest results for a book in hand, scan the book's ISBN barcode, usually found on the back cover. Make sure to select ISBN from the toolbar and not Barcode. You may have to configure your scanner first. See “Configuring scanners” on page 699 for a list of configurable scanners, instructions on configuring yours, and additional uses for this feature.
- Searches for titles with leading articles follow your setup choice about ignoring articles in search terms. See page 55 for information about the miscellaneous Cataloging settings.
- Cataloging searches specific tags when you choose a search button. For a list of the tags used in different searches, see page 637.

Using Limiters on your local database

Limiters let you make the searches on your local database more specific. If you just received, say, a shipment of videos, you might want to limit your searches to the material type “Films.” When using limiters though, keep in mind that if a record doesn't contain the required information, Cataloging ignores it. While all MARC records contain the material type, many do not have reading or interest levels. For example, in a search limited by interest level, Cataloging skips records without a 521 tag and without the specified interest level in the 521 tag.

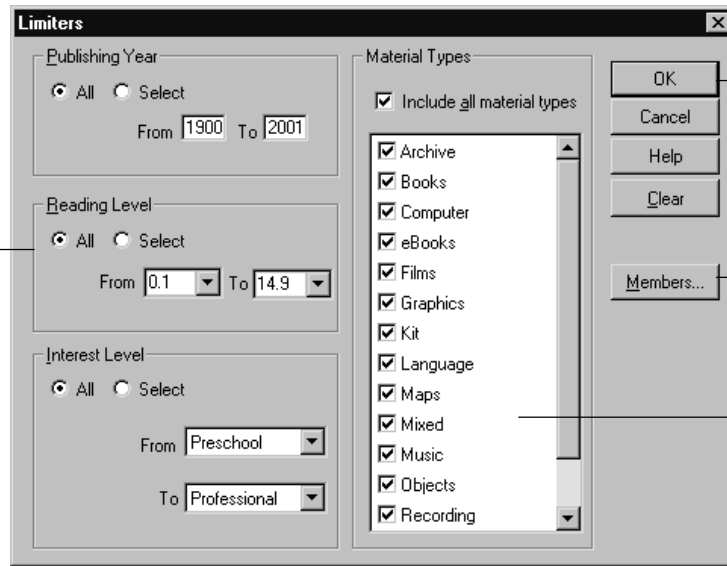
Limiters are only supported when searching your local database. They are, however, ignored during authority, call number, category, Accelerated Reader, Reading Counts!, and Lexile searches.



To set your limiters, select Limiters from the Tools menu or toolbar:

Reading levels can range from 0.1 to 20.0. To enter a number above 14.9, type it in the text box.

Note: For the reading and interest levels limiters to be effective, your records must contain information in a 521 tag. For more information on cataloging reading and interest levels, see page 634.



Click to save the limiters.

To limit the search to one member database - available only for Union Catalog Plus

Allows you to select multiple material types

To limit by publishing year, reading level, or interest level, choose Select and define the desired range. To limit searches by material type, select or clear the check boxes so only the material types you want to include are checked. Remember, the more restrictive you make the limiter options, the longer it takes to get search results.

For Union Catalog Plus: In addition to using the above limiters, you can choose to search the entire union catalog database or only the collection of one member site. By default, the entire union catalog database is searched. To search a single member’s collection, click the Members button on the Limiters dialog, and select the desired member. When you limit by member, the search results include only the titles owned by that member, but the Copy Information in the MARC Viewer shows *all* the copies attached to the record. To clear the member limitation and resume searching the entire union catalog database, click Clear and OK on the Limiters dialog.

Accelerated Reader search



In both Cataloging and OPAC, you can search for items belonging to the Accelerated Reader program. You can limit the search by reading level, point value, subject, and/or author.

To retrieve them, you must have either “Accelerated Reader” or “AR” in subfield a of the 526 tag in the item’s MARC record. To limit by reading level, the reading level must be in the 526 subfield c. The search does not examine the 521 tag (Target Audience Note). To learn more about cataloging Accelerated Reader information in the 526 tag, see page 635.

In OPAC, the full MARC record display in the text interface includes subfields a, b, c, d, and z (at Union Catalog Plus sites, subfield 5 also appears). The record display in the visual interface includes subfields a, c, d, and z.

To begin a search, enter a range of Reading levels between 0.0 and 15.0, or select All. Each title in the Accelerated Reader program is worth a certain number of points, ranging from 0.0 to 130.0. To limit your search to titles that are above or below a certain point value, enter a point value range. If you want to find a title about a particular subject, or by a certain author, make sure you enter that information too. When you're ready, click Search.

The screenshot shows the 'Cataloging' application window. At the top, there is a menu bar with 'File', 'Edit', 'Search', 'Tag', 'Subfield', 'Tools', and 'Help'. Below the menu bar is a search bar with a dropdown menu set to 'Local Database'. A row of icons includes 'Title', 'Author', 'ISBN', 'LCCN', 'Subject', 'AR', '+ Title', 'Book Cart', and 'Help'. The 'Accelerated Reader Search' dialog box is open, featuring two sections: 'Reading Level' and 'Point Value'. Each section has radio buttons for 'All' and 'Select', and 'From'/'To' input fields. The 'Subject' and 'Author' fields are located below these sections, with an 'AND' label between them. On the right side of the dialog box are 'Search', 'Cancel', and 'Clear All' buttons. Annotations with lines point to the 'Reading Level' and 'Point Value' sections, the 'Search' button, and the 'Subject' and 'Author' fields.

To narrow the search, select the reading level, and/or the point value.

Click to open the AR dialog, or use the Search menu.

Any entries here are also optional.

Titles in Book Cart: 0

Lexile search



Lexile measures refer to numeric ranges from 1 to 2400 of the Lexile Framework for Reading—an educational tool that links text and readers under a common metric without subjective evaluation.

You must have Lexile information in the 521 tag of your MARC records for this search to yield results. To learn more about cataloging Lexile information in the 521 tag, see page 634.

To begin a search, enter a Reading level. To limit your search to your reading level, select 0 in the Search for titles above and below box, or select 50 or 100 above and below for a broader search. If you want to find a title about a

particular subject, or by a certain author, enter that information too. When you are ready, click Search.

Enter a Lexile Measure. The search can be narrowed to plus or minus 0, 50, or 100 Lexiles.

Click to open the Lexile dialog, or use the Search menu.

Any entries here are optional.

In addition to searching for Lexile measures, you can include Beginning Reader and Non-Prose Titles. To include titles intended specifically for beginning readers, select the Include Beginning Reader Titles check box. Selection of the Include Non-Prose Titles check box displays items containing at least 50% nonstandard prose that do not have Lexile measures. Examples of non-prose materials include poems, plays, songs, and books with incorrect or no punctuation.

Reading Counts search



The Reading Counts search allows you to search Scholastic Reading Counts! titles by subject, author, reading level, and/or point values. The resulting list includes a reading level number and the number of points a student can earn by reading certain titles.

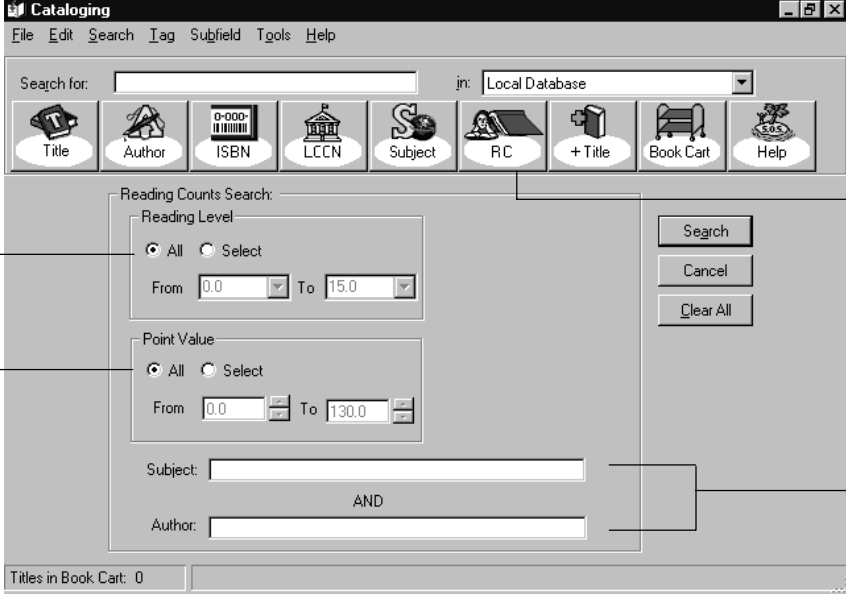
You must have Reading Counts! information in the 526 tag of your MARC records for this search to yield results. To limit by reading level, the reading level must be in the 526 subfield c. The search does not examine the 521 tag (Target Audience Note). For more about cataloging the 526 tag, see page 635.

In Cataloging and the OPAC, the full MARC record display includes subfields a, b, c, d, and z (at Union Catalog Plus sites, subfield 5 also appears) in the 526 tag. The record display in the visual OPAC interface includes subfields a, c, d, and z.

To begin a search, enter a range of Reading levels, or select All. Reading levels can range from 0.0 to 15.0.

Each title in the Reading Counts program is worth a certain number of points. Point values can range from 0.0 to 130.0. To limit your search to titles that are above or below a certain point value, enter a point value range.

If you want to find a title about a particular subject, or by a certain author, make sure you enter that information too. Only the first five hundred titles display, so you are more likely to receive relevant titles if you use specific point values and keywords. When you're ready, click Search.



The screenshot shows the 'Cataloging' software window. At the top, there is a menu bar with 'File', 'Edit', 'Search', 'Tag', 'Subfield', 'Tools', and 'Help'. Below the menu bar is a search bar with a 'Search for:' field and a 'jn: Local Database' dropdown. A toolbar contains icons for 'Title', 'Author', 'ISBN', 'LCCN', 'Subject', 'RC', '+ Title', 'Book Cart', and 'Help'. Below the toolbar is the 'Reading Counts Search' section, which includes 'Reading Level' and 'Point Value' filters. The 'Reading Level' filter has radio buttons for 'All' and 'Select', and 'From' and 'To' dropdown menus set to '0.0' and '15.0'. The 'Point Value' filter has radio buttons for 'All' and 'Select', and 'From' and 'To' dropdown menus set to '0.0' and '130.0'. Below these filters are 'Subject:' and 'Author:' text input fields, with an 'AND' button between them. To the right of the filters are 'Search', 'Cancel', and 'Clear All' buttons. At the bottom left, it says 'Titles in Book Cart: 0'.

To narrow the search, select the reading level, and/or the point value.

Click to open the RC dialog, or use the Search menu.

Any entries here are optional.

Find-It-All Collection



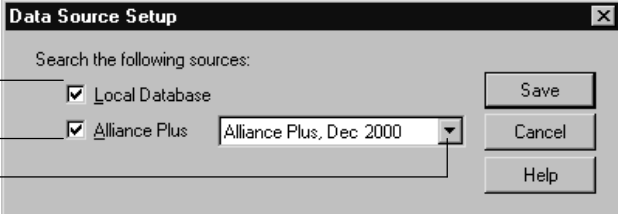
In both Cataloging and OPAC, you can conduct a search of your local library, Internet sites, and subscription databases through a Find-It-All One Search interface. You can access over 160,000 safe, high-quality, K-12 Web sites with Find-It-All Knowledge Links. When you purchase a subscription, clicking the Find-It-All button on the toolbar, or the Search menu entry, launches your browser and opens the Find-It-All One Search or Knowledge Links search page.

Note: When you purchased Find-It-All, the information for setting up and administering your Find-It-All Collection came as a separate document.

Searching Alliance Plus Online or Alliance Plus CDs

If you've installed Alliance Plus and have access to either Alliance Plus Online or one or more Alliance Plus CDs, your searching capabilities are greatly increased.

To search Alliance Plus, from the menu, select Tools | Data Sources. The Data Source Setup dialog appears:



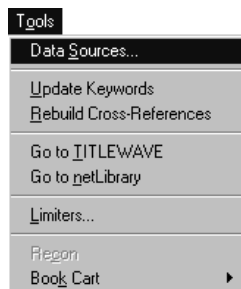
The screenshot shows the 'Data Source Setup' dialog box. It has a title bar with 'Data Source Setup' and a close button. The main area contains the text 'Search the following sources:' followed by two checked checkboxes: 'Local Database' and 'Alliance Plus'. To the right of the 'Alliance Plus' checkbox is a dropdown menu showing 'Alliance Plus, Dec 2000'. At the bottom right are 'Save', 'Cancel', and 'Help' buttons.

Select the data sources you want to search.

Click here to select a CD or Alliance Plus Online.

1. Select one or both of the check boxes.
2. Choose Alliance Plus Online or one of your Alliance Plus CDs in the list.
3. To close the dialog when you are finished, click Save.
4. Back in the main window, on Cataloging's toolbar, choose Selected Database Sources from the database drop-down list.

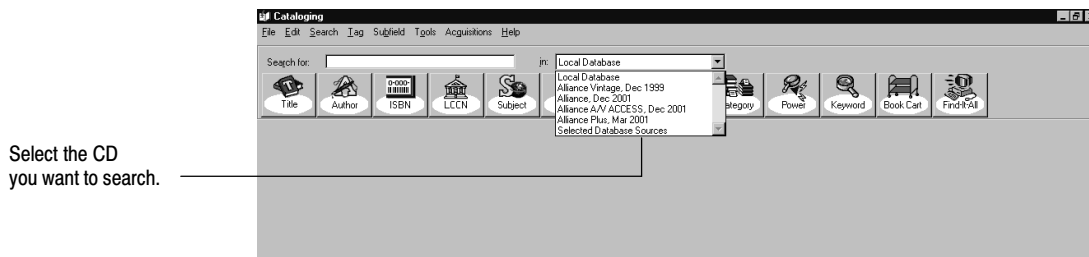
Your search options vary based on the data source you choose:



| Search | Local Database | Alliance Plus CD | Selected Database Sources |
|-------------------------------|----------------|------------------|---------------------------|
| Title | • | • | • |
| Author | • | • | • |
| ISBN or ISSN | • | • | • |
| LCCN | • | • | • |
| National Bibliographic Number | • | | |
| Subject | • | • | • |
| Series | • | • | • |
| Call Number | • | | |
| Category* | • | | |
| Power | • | | |
| Keyword | • | | |
| Accelerated Reader | • | | |
| Lexile | • | | |
| Reading Counts | • | | |
| Barcode | • | | |
| Authority Headings | • | | |

* Category searches are not available in Union Catalog Plus.

You may not have access to Alliance Plus Online and are searching only Alliance Plus CDs. If so, instead of selecting your database on the Data Source Setup dialog, it's quicker to select the desired CD from the list on the toolbar:



If you've added or switched Alliance Plus CDs since starting Cataloging, select File | Refresh CDs to update the database drop-down list. To switch Alliance Plus CDs from a Mac OS workstation, select Local from the database list, eject the current CD by dragging the current CD to the Trash. Insert the new CD, and select File | Refresh CDs to update the database list.

See also: If you have a subscription to Alliance Plus Online but cannot connect to it from Windows workstations, you may need to re-enter and save your Follett Customer Number in System Setup | Site | Identification, or you (or your technician) may need to enter your proxy server information on the System Setup | Cataloging | Misc tab. For more information, see page 58 in Chapter 3, "Preparing to catalog your collection," or for more technical information, see the *Installation Guide*.

Scanning an ISBN

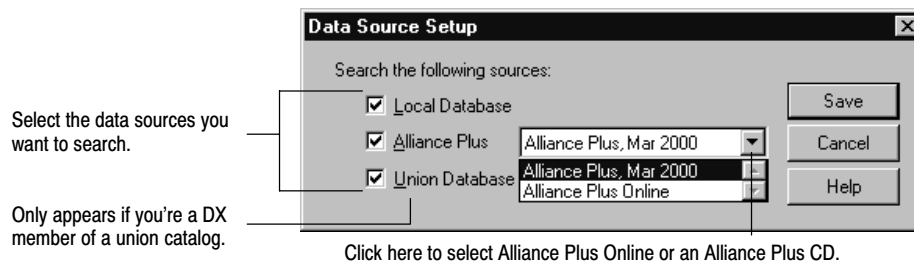


The fastest way to find the exact record you need to catalog a book in hand is to scan its ISBN barcode. When you search Alliance Plus by ISBN or ISSN, you must enter the number *exactly*. By scanning it with a properly configured scanner, you'll eliminate typing errors and speed up searches. Make sure to select the ISBN button on the toolbar, not the Barcode button.

See "Configuring scanners" on page 699 for a list of configurable scanners, instructions on configuring yours, and additional uses for this feature.

Searching your DX union catalog

If you're a DX-enabled member of a union catalog, you can search your union catalog at the same time as your local database and/or an Alliance Plus source. Select the Union Database check box on the Data Source Setup dialog:



Using your search results

After most search requests, a selection list highlighting the closest match appears. The selection list identifies the search type and search term used. If your search required an exact match (e.g., LCCN and barcode searches), the record opens in the MARC Viewer. If so, skip to page 249.

Note: Keyword and Power searches return a list of the bibliographic records that meet your keyword criteria. If a keyword can't be found, Cataloging returns a subject hitlist with the closest match highlighted.

To open any item, double-click on it, or highlight it and press the Enter key.

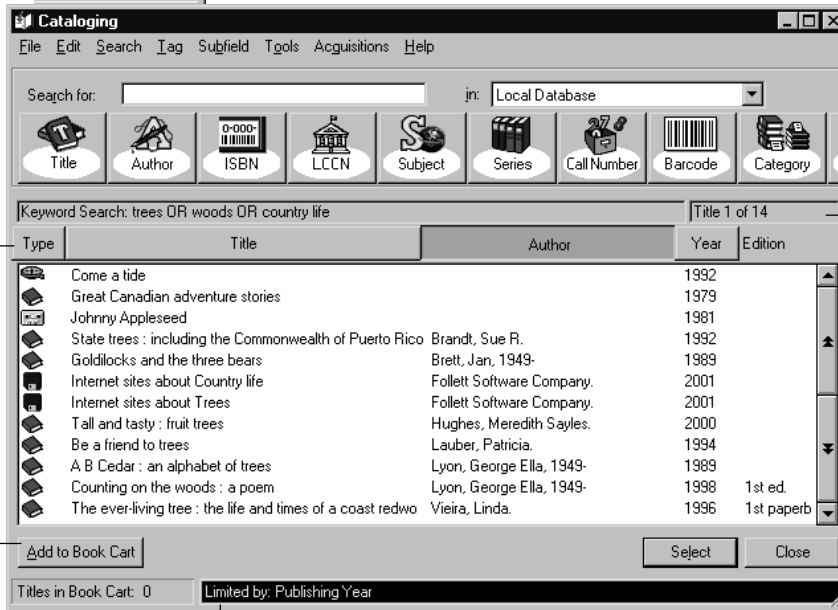
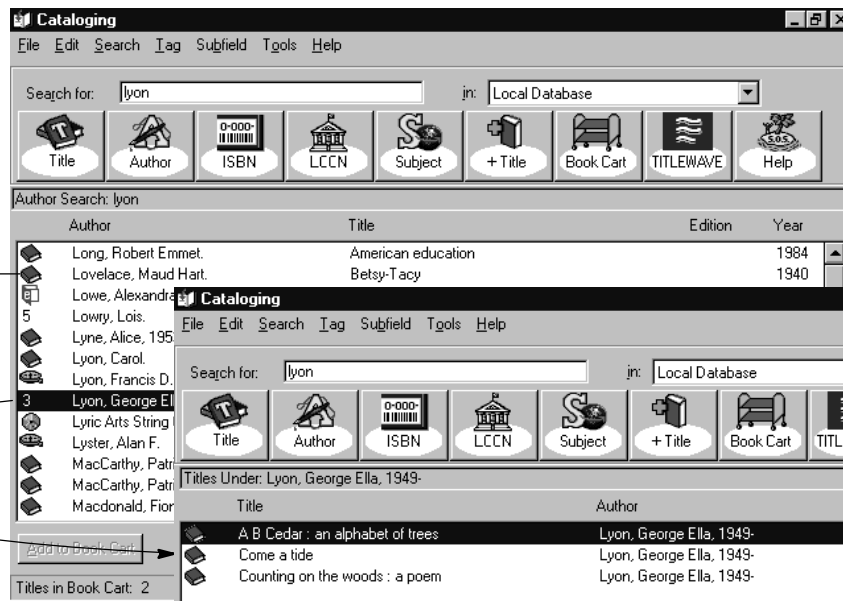
Items with a material type icon open in the MARC Viewer.

Items with multiple entries generate a secondary selection list.

Click the column header to sort a Power or Keyword Search selection list.

The Add to Book Cart button is enabled only when titles that can be added to the Book Cart are selected.

Any limiters being applied to the search appear in the status bar.



Shows the number of entries in a Power or Keyword Search selection list

To return to the previous window, click Close.

If you're searching Selected Database Sources, the selection list shows (from left to right) the title, the matching entry, and the source of each record. If you're searching for authority records, the selection list shows the heading, usage, and the date the record was last updated.

If the selection list doesn't include the item you want, try another type of search. When you're sure that there isn't even a close match, see "Adding, saving, copying, and editing MARC records" on page 251.

If you think you've found a match, double-click on it, or highlight it and press Enter. The selected record appears in the MARC View window.

The MARC View window gives you two ways to view a record: MARC Proof Sheet Display and OPAC Display. To switch between the different MARC View displays, select the appropriate option from the File menu:

In OPAC Display, a bibliographic record appears almost exactly as your patrons see it in the OPAC, including the hyperlinks to electronic resources.

This lets you check the record's content and the validity of any Electronic Access links you've cataloged.

Note: For netLibrary eBooks only, a hyperlink (856 tag) does not appear in OPAC Display. To view the netLibrary eBook, click the Preview button in the lower right corner of the window.

In OPAC Display, authority records display only the authority heading with the associated 4XX (SEE) and/or 5XX (SEE ALSO) tags.



The MARC Proof Sheet Display shows all of the record's tags and subfields. This lets you make certain that you've found the right record.

If you're searching Alliance Plus or the union catalog database, make certain you check the MARC Proof Sheet Display before you save the record to your database.

In both views, a bibliographic record shows the call number, barcode, status, and description for each copy.

Note: In Union Catalog Plus, Copy Information shows the member's name, call number, barcode, and description.

Shows the number of titles in the Book Cart and any copy circulation status



Return to the selection list

Access more information about this title

Available only with a TitlePeek subscription

Shows the material type

When you display a netLibrary eBook, there is an additional button on the lower right corner of the window for previewing the item. Click the Preview button to launch your browser and open the eBook at the netLibrary Web site. In OPAC Display, the netLibrary hyperlink (856 tag) does not appear.

In some bibliographic records, you might notice certain electronic access (Elec. Access) hyperlinks (856 tags) appear and print from the OPAC Display but not in the MARC Proof Sheet Display. You're seeing "virtual" 856 tags in action. To edit, delete, or export a virtual 856 tag, find the *authority* record that contains the information; the authority heading matches one of the bibliographic record's subject headings.

Note: You control whether or not virtual 856 tags display; see the "Show Authority 856 tags in OPAC" option on System Setup's Cataloging Misc tab (see page 57). For more information on virtual 856 tags, see page 358.

For Union Catalog Plus: Copy Information differs slightly at the union catalog. Each copy listing shows the short site name of the member that owns it. Availability (status) does not display. Even if the search was limited to a single member, Copy Information shows *all* the copies attached to the record.

| Member | Call Number | Barcode | Description |
|------------|-------------|----------|-------------|
| Can Elem | FIC HOP | T 428 | |
| Troy JHS | E HOP | T 5955 | |
| Sellers HS | FIC HOP | T 48092 | |
| Fenzel FC | F HOP | T 654871 | |
| Jensn Elem | Fic HOP | T 9334 | |

TitlePeek

If you have a subscription to TitlePeek, you may see a button on the right (next to the Save button). Clicking this button launches your browser and displays additional bibliographic information about the title. This may include: cover image, table of contents, publisher summary, author notes, and journal reviews.

This service allows you to "browse the shelves" without leaving your workstation and can assist you in collection development, curriculum support, and the assessment of readability and interest levels. The button appears in the MARC View window only when the MARC record contains an ISBN *and* information is available for the title *and* you have a subscription to TitlePeek. You can access this information through MARC records that are in your local database, your union catalog, or from Alliance Plus Online.

See also: If you have a subscription to TitlePeek but cannot connect to it from Windows workstations, you (or your technician) may need to enter your proxy server information on the System Setup | Cataloging | Misc tab. For more information, see page 58 in Chapter 3, "Preparing to catalog your collection," or for more technical information, see the *Installation Guide*.

The screenshot shows the 'Cataloging' software window with a search for 'harry' in the 'Local Database'. The MARC record for 'Harry Potter and the Chamber of Secrets' is displayed. The 'TitlePeek' button is highlighted, and an arrow points to a browser window showing the book's title information and journal reviews.

To access title information, click the TitlePeek button.

The available information appears in your browser.

Available Information:

Book Title: BOOK AUTHOR
Harry Potter and the chamber of secrets by J. K. Rowling

Library Journal Review

Gr 3-8 With a year at Hogwarts School under his belt, Harry expects the new term to go smoothly, but a wizard's share of surprises and adventures await the likable lad and his friends. Rowling works her magic and leaves readers begging for more. (July) Copyright 1999 Cahners Business Information, Inc.

School Library Journal Review

Gr 3-8 Fans of the phenomenally popular Harry Potter and the Sorcerer's Stone (Scholastic, 1998) won't be disappointed when they rejoin Harry, now on break after finishing his first year at Hogwarts' School of Witchcraft and Wizardry. Reluctantly spending the summer with the Dursleys, his mean relatives who fear and detest magic, Harry is soon whisked away by his friends Ron, Fred, and George Weasley, who appear at his window in a flying Ford Anglia to take him away to enjoy the rest of the holidays with their wizardly family. Things don't go as well, though, when the school term begins. Someone, or something, is (literally) petrifying Hogwarts' residents one by one and leaving threatening messages referring to a Chamber of Secrets and an heir of Slytherin. Somehow, Harry is often around when the attacks happen and he is soon suspected of being the perpetrator. The climax has Harry looking very much like Indiana Jones, battling a giant serpent in the depths of the awesome and terrible Chamber of Secrets. Along with most of the teachers and students introduced in the previous book, Draco Malfoy has returned for his second year and is more despicable than ever. The novel is marked throughout by the same sly and sophisticated humor found in the first book, along with inventive, new, matter-of-fact uses of magic that will once again have readers longing to emulate Harry and his wizard friends. -Susan L. Rogers, Chestnut Hill Academy, PA Copyright 1999 Cahners Business Information, Inc.

Booklist Review

Gr. 4-8. Given the furor this book has already caused in the U.S., it seems almost redundant to review it, however. . . . Harry Potter's exploits during his second year at Hogwarts School for Witchcraft and Wizardry completely live up to the bewitching measure of Harry Potter and the Sorcerer's Stone, a Booklist Editors' Choice, 1998. Harry's summer with the spiteful Dursleys is as dismal as his life with them before Hogwarts, and not only that, a neurotic house-elf suddenly appears to warn him against returning to school. Harry, of course, goes back to school. Once there, he finds himself in danger, as predicted by the house-elf

Adding, saving, copying, and editing MARC records

If the record you want doesn't exist in your database, you can create a new record from scratch, or copy or import it from another source. If you find the record on Alliance Plus Online, on an Alliance Plus CD, or at your union catalog, you can copy it into your collection and add your local copy information. If you find a close—but not exact—match (an earlier edition, for example), you can copy and modify it to meet your needs. From either the selection list or the MARC View window, you can add a new record or duplicate (copy) the selected record:

- To copy a bibliographic record from Alliance Plus Online, an Alliance Plus CD, or your union catalog database, into your local database: In the MARC

View window, click Save; or, from the selection list, highlight the desired record, select File | Add Title, and click Yes to the message asking if you want to duplicate the record. You can then edit it, if needed, and add copies.

- To create a bibliographic record from scratch, select File | Add Title, and then either Easy (Editor) or MARC (Editor). If it appears, click No to the message asking if you want to duplicate the record. If you choose the MARC Editor, you'll need to select the appropriate template.
- To duplicate one of your own bibliographic records for editing, highlight it and select File | Add Title and either Easy (Editor) or MARC (Editor). Click Yes to the message asking if you want to duplicate the record.
- To create an authority record, select File | Add Authority or click + Authority. If it appears, click No to the message asking if you want to duplicate the record. Select the appropriate template.
- To duplicate an authority record for editing, highlight it and select File | Add Authority. Click Yes to the message asking if you want to duplicate the record.

To continue, see Chapter 22, "Using the Easy Editor," or Chapter 23, "Using the MARC Editor."

Tip: To open your preferred editor, click + Title. To change your preferred editor, see "Setting up miscellaneous Cataloging options" on page 55.

If you have another source of records, use one of Cataloging's import options to add the records to your database. For more information, see Chapter 25, "Importing MARC records."

From the MARC View window, you can edit the record or work with its copies:

- To edit a bibliographic record, select File | Edit Title, and either the Easy Editor or the MARC Editor, click the Edit button on toolbar, or from the Book Cart double-click a record or highlight a record and click the Edit button. For instructions on creating and editing records, go to Chapter 22, "Using the Easy Editor," or Chapter 23, "Using the MARC Editor."
- To edit an authority record, click Edit. To continue, see Chapter 23, "Using the MARC Editor."
- To add, edit, or delete a copy, see Chapter 24, "Working with copies."

To run an autorecon on a group of records, or transfer them to MARC Magician, start by adding them to the Book Cart. For more information, see page 346.

Deleting a MARC record

To delete a MARC record and all its copies, bring up the MARC record in the MARC View window. Click Delete, or select File | Delete Record.

Warning: Once you verify the deletion, you cannot stop or reverse the process.

If the MARC record has copies that were checked out or have some other pending transaction, a message appears asking you to confirm the deletion. If an exception report is generated, you are given an opportunity to view and save it.

Cataloging can automatically delete a MARC record when its last copy is deleted. To enable this feature, open the System Setup module, select Setup | Cataloging | Misc, and select the Delete Title When Last Copy is Deleted check box.

You can also globally delete MARC records that have no copies. See page 335 for more information about Global Delete Titles Without Copies.

Printing MARC records

Cataloging also lets you print a variety of information. You can print the visible portion of your selection lists, the title and copy or authority information from the MARC View window, or a MARC record proof sheet from the MARC Editor.

To print the contents of a window, select File | Print.

Notes

Chapter 22 Using the Easy Editor

This chapter provides information and instructions for adding and editing bibliographic records in the Easy Editor. Even if you have little or no cataloging experience, the Easy Editor lets you create solid MARC records and perform other routine cataloging tasks.

Note: Although identified by descriptive prompts, when you enter information into the Easy Editor, you are creating a MARC record. To see how the fields in the Easy Editor correspond to MARC tags and subfields, see “Tags in the Easy Editor” on page 632.

When to use the Easy Editor

Easy Editor is just that. It’s ideal for adding uncomplicated records to your database. If you’re cataloging a book, much of the information you’ll need can be found on the title and copyright pages. If you use Alliance Plus to enhance your records, it’s even easier (see “Brief MARC Record tab” on page 256).

There may be situations where you may want to use the MARC Editor rather than the Easy Editor. Since the Easy Editor has a limited number of fields, there might be information that you want to include that can’t be entered through Easy Editor. Also, if the item you’re cataloging doesn’t match the default material type settings, you may need to make changes in the MARC Editor.

When duplicating a record, consider how much of the original record you want to retain; the Easy Editor discards the information it can’t display. If you only want to duplicate the basic title information, use the Easy Editor. However, if you only want to change a few fields, use the MARC Editor.

When editing a record with the Easy Editor, if the record contains information that isn’t visible, this message appears at the bottom of the dialog: Title has additional information that can only be maintained in the MARC Editor. If you see this message, you may want to edit the record in the MARC Editor instead. (See Chapter 23, “Using the MARC Editor.”)

Working with bibliographic records

Before you can update or duplicate an existing bibliographic record, or create a new one, you’ll need to either locate the record or verify that it doesn’t already exist. For searching instructions, see page 240.

- To add a new record or to duplicate the selected record, from the selection list or MARC View window (see pages 248 and 249), choose File | Add Title | Easy. If the Easy Editor was selected as your preferred editor (see “Setting up miscellaneous Cataloging options” on page 55), just click + Title. A message

appears, giving you the option to duplicate the selected record. Select Yes to duplicate the record or No to start from scratch.

- To edit a record, from the MARC View window (see page 249), select File | Edit Title | Easy. If the Easy Editor was selected as your preferred editor (see “Setting up miscellaneous Cataloging options” on page 55), just click Edit.

The Easy Editor opens on the Brief MARC Record tab.

Brief MARC Record tab

The Brief MARC Record tab contains the basic information about the item you’re cataloging: title, standard numbers, material type, author, publication information, and physical format. Entering information on this one tab creates a brief record; it contains only tags 000 through 300.

Note: If you plan to recon the records with Alliance Plus, you need to enter just the title and any standard numbers (LCCN, ISBN, or ISSN) and select the correct material type. Alliance Plus adds the rest (see Chapter 31, “Autorecon and Reading Program Recon”).

Tip: To make this even easier: Enter the title; put the cursor in the ISBN field; and just scan the ISBN barcode on the back cover of the book. See Appendix H (page 699) for information on scanning ISBN barcodes.

To enter your information, use the table on page 257. For additional information, click Help.

You must enter a title before you can save the record.

If you’re adding a new record, select the material type that most closely matches the item you’re cataloging (see page 264 for descriptions). Please note: microfiche reproductions should use the material type of the original; there is also a selection in the list specifically for eBooks.

Find Headings button is enabled when you are in the Author fields.

The screenshot shows the 'Easy Editor' window with the 'Brief MARC Record' tab selected. The form contains the following fields and values:

- Title: How mountains are made /
- Subtitle: (empty)
- Responsibility: Weidner Zoehfeld ; illustrated by James Graham Hale. Edition: 1st ed.
- LCCN: 93045436 /AC
- ISBN: 0060245107
- ISSN: (empty)
- Material Type: Book (Monograph)
- Author: Zoehfeld, Kathleen Weidner. Dates: (empty)
- Publication Place: New York :
- Publisher: HarperCollins, Date: c1995.
- Physical Format Extent: 29 p. ; Other Detail: col. ill., col. maps ; Size: 21 x 26 cm.

Buttons on the right include Save, Find Headings, Cancel, and Help. A note at the bottom of the form states: 'Entering information beyond this tab will create a Full MARC record.'

Examples: 149 p.
 1 score (16p.)
 1 sound disc (20 min.)
 160 slides
 8 reels of 8 (7557 ft.)

Indicate any photos, illustrations, color plates, etc. Item’s dimensions (in cm. or in.)

| Group/Field | What it contains | Tips |
|------------------------|---|--|
| Title | | |
| Title | Main title | Usually only the first word of the main title and proper nouns are capitalized. If you're cataloging a book, you can find most of this information on the title page. Note: Easy Editor adds the ending punctuation in these fields. |
| Subtitle | Additions to the main title | |
| Responsibility | People who created this title (author, editor, narrator, illustrator, etc.) | |
| | Note: You must enter "uniform titles" (e.g., Bible, Arabian nights, or Beowulf) in the MARC Editor. | |
| Author | Person primarily responsible for the title | Enter names with the last name first (e.g., Canfield, Jack). |
| Dates | Any dates associated with the name. Typically these are the dates of birth and death (e.g., 1902-1986 or 1968-). | Note: Names without dates, should end in a period. Names with dates should end in a comma. Dates should end with a period, unless they end with a dash (e.g., Kraft, Jim, 1954-). |
| | Note: The following types of authors must be entered in the MARC Editor: | |
| | <ul style="list-style-type: none"> • Personal names with titles or numeration or with the full name in parenthesis (e.g., John Paul II, Pope, 1920- or Smith, Elizabeth A. (Elizabeth Ann), 1923-1989.) • Names based on a forename or family name (e.g., Farquar family or Aristotle) • Corporations (e.g., Ford Motor Company) • Conferences (e.g., World Peace Conference) | |
| Publication | | |
| Place | City of publication or distribution | If it isn't a major city, you may also want to enter the state, province, or country. |
| Publisher | Full name of the publisher or distributor | Note: Easy Editor adds the ending punctuation in these fields. |
| Date | Date of publication or distribution | |
| Physical Format | | |
| Extent | Number of pages, volumes, playing time | The ending punctuation depends on the information you enter. If you include a size, the field before it should end with a space and semicolon. If you include Other Details, add a space and a colon to the end of the Extent information. |
| Other Detail | Other physical details of the item | |
| Size | Item's dimensions | |

To catalog eBooks, select eBook from the Material Type list, enter the URL on the Added Description tab, and fill in the other fields as applicable. For more information about cataloging electronic resources, see page 355.

Added Description tab

Use the fields on the Added Description tab to provide your patrons with information about the title's series and volume, notes, and audience. You can also add a link to a Web site.

Notes provide your patrons with additional information about a title's contents. The words in these notes are added to the keyword index, and, thus, provide better access through keyword searches. Enter a general note, a summary note,

the interest grade level, or study program information. You can often locate this information on a book's copyright page.

If your library participates in the Accelerated Reader program, enter either "Accelerated Reader" or "AR" in the Study Program text box. If you have Reading Counts!, enter either "Reading Counts" or "RC" there. You can, then, locate the items by using the reading program's search dialog in Cataloging and in the text OPAC. If you wish to add a reading level, point value, or test number, please use the Marc Editor.

Lets you provide general information about the title or its contents.

Provides a brief description of the title's plot or content.

Identifies the target audience. You can search Cataloging and OPAC or create a Bibliography Report with this information.

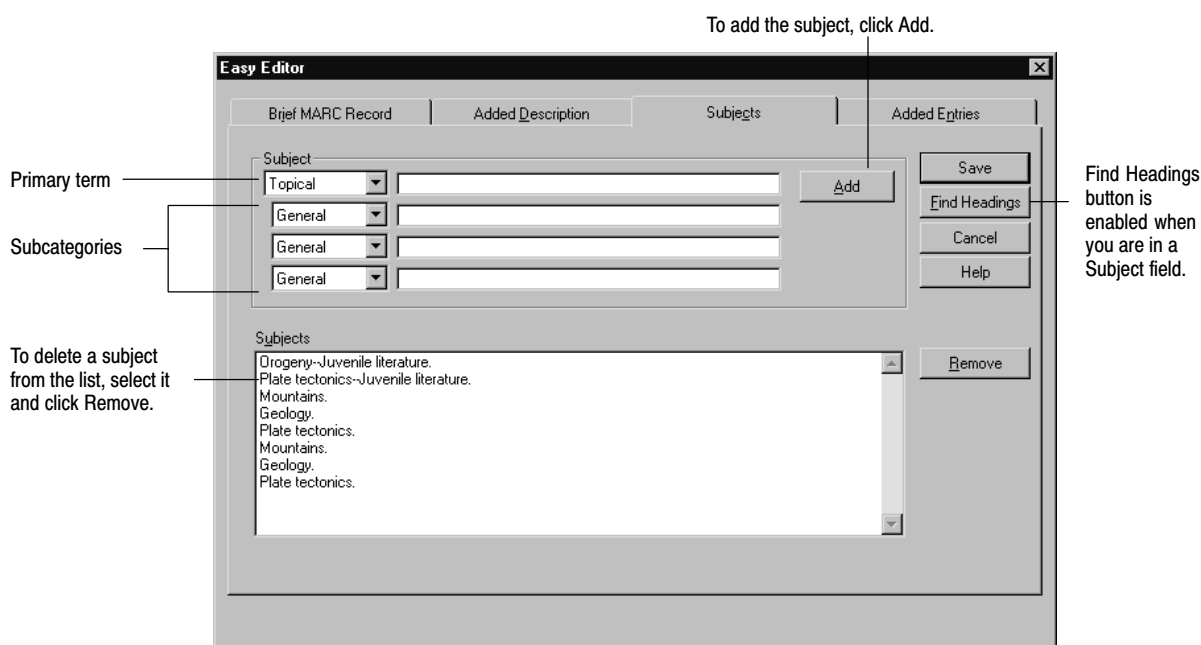
| Group/Field | What it contains | Tips |
|----------------------------|--|--|
| Series | The series title, if any. | Follows the same rules as the title. |
| Volume | Any information that shows the title's position in the series (e.g., 124). | Note: If a series has volume number, add a space and semicolon to the end of the series title (e.g., Goosebumps ; #4). |
| Electronic Resource | | |
| Web URL | A Web site's URL | This information creates a hyperlink to the Web site in OPAC and the MARC View window (in OPAC Display). For accuracy, copy and paste it from your browser's address bar. Note: For more information about cataloging electronic resources, see page 355. |
| Description | Brief description of the Web site | |
| Interest level | Interest grade level | Select the appropriate grade level. The Easy Editor assigns a first indicator of 2. Note: This field displays only the Interest grade level, not the Interest age level. |

Providing access through subjects

Subjects help your patrons find titles with a common topic. Use the options on this tab to maintain subjects for this title. To enter a new subject, from the first drop-down list select the category that matches the subject's primary term. If the subject needs additional definition, you can select up to three subcategories.

Tip: To maintain consistency if you're not sure of which headings to use, select the Find Headings button to access a list of existing subject headings.

Note: Subjects based on the name of a corporation or conference, genre, form, or uniform title must be entered in the MARC Editor. Personal names that include titles or numeration (e.g., John Paul II, Pope), the full name in parenthesis, or that are based on a forename (e.g., Aristotle) or family name must also be entered in the MARC Editor.



To enter your information, use the information in the following table. For additional information, click Help.

| Option | What it contains | Tips |
|----------------------|--------------------------------------|---|
| Topical | General terms or phrases | Add a period to the end of the last entry for a subject, unless it ends with a dash or a closing parenthesis. |
| Personal | Straightforward personal names | |
| Geographic | Names of locations | Note: Names can also be subjects. If there are dates associated with the name, the name should end with a comma. Select the Chronological option from the second drop-down list, and enter the associated dates in the text field. |
| Local | Subjects of local design or interest | |
| General | General terms or phrases | |
| Chronological | Specific dates or time periods | |
| Form | Specific genres or material types | |

Providing additional entries

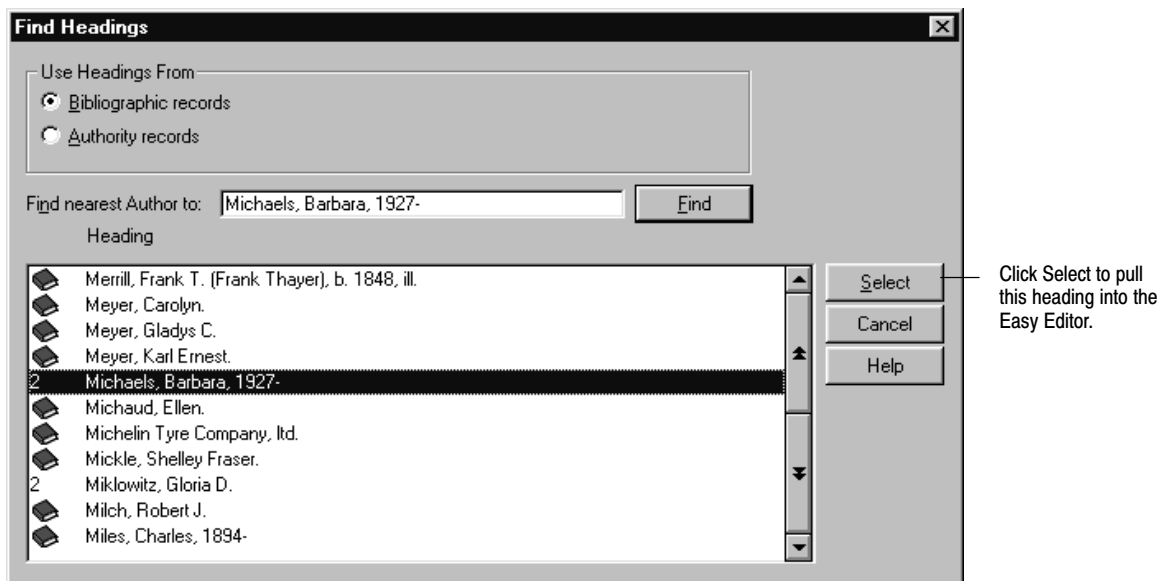
On the last tab, enter any personal names (other than the main entry author) that are associated with the title. Add co-authors, illustrators, compilers, or editors, to provide additional access to the record.

Add any additional personal names associated with this title: authors, illustrators, editors.

| Option | What it contains | Tips |
|----------------|--|---|
| Authors | | |
| Name | Co-authors, illustrators, etc. | Enter names with the last name first (e.g., Canfield, Jack). |
| Dates | Any dates associated with a name. Typically these are the dates of birth and, if appropriate, death (e.g., 1902–1986 or 1968–). | Note: Names without dates should end in a period. Names with dates should end in a comma. Dates should end with a period, unless they end with a dash (e.g., Kraft, Jim, 1954–). |

Using the Find Headings feature

To create consistency in your collection, Find Headings allows you to quickly retrieve a list of existing author, subject, or series headings from which to select. The Find Headings button becomes enabled whenever you are in an author, subject, or series field within the Easy Editor.



To use Find Headings from the Easy Editor, you must have your cursor in an Author, Subject, or Series field.

1. Click the Find Headings button to open the dialog.
2. If there is already data in the Author, Subject, or Series field, it appears in the Find Nearest text box. If the Find Nearest text box is empty, enter your search text to search for an author's name, a subject heading, or a series name, and press the Find button. A list of headings appears.
3. Highlight the desired heading in the list. Click Select to copy the heading to the Easy Editor. Then click Add to enter it into your MARC record. Only the subfields existing in the Easy Editor appear in the Subjects group box, but all the subfields in the selected heading are added to the MARC record. Saving the new record populates any field that existed in the original record.

Important: Selecting a heading *overwrites* any information in the tag that you may have entered before selecting the heading.

What's next?

After making all the necessary changes to a record, click Save. When you save a bibliographic record, Cataloging checks that you entered the required title information, formats the standard numbers (LCCN, ISBN, ISSN), and verifies that you haven't inadvertently duplicated a standard number from another record. Once the record is saved, Cataloging displays it in the MARC View window (see page 249):

- If you are cataloging a new title, you'll need to add copy information. See Chapter 24, "Working with copies."
- If you aren't creating keywords as you save records (see "Setting up miscellaneous Cataloging options," page 55), once you've finished cataloging, update your keywords. For more information, see page 345.

See also: For information on deleting MARC records, see page 252.

Chapter 23 Using the MARC Editor

This chapter provides information and instructions for manually adding and editing bibliographic and authority records in the MARC Editor.

If you are comfortable with the MARC standard, the MARC Editor lets you take full advantage of its detail and flexibility. Although the details of the MARC standard are beyond the scope of this guide, if you would like additional information, we recommend the publications listed on page 234.

You can apply many of the procedures for working with bibliographic records to authority records. Information specific to authority records begins on page 278.

Working with bibliographic records

Before you can update or duplicate an existing bibliographic record, or create a new one, you'll either need to locate the record or verify that it doesn't already exist. For searching instructions, see "Finding MARC records in your collection" on page 240.

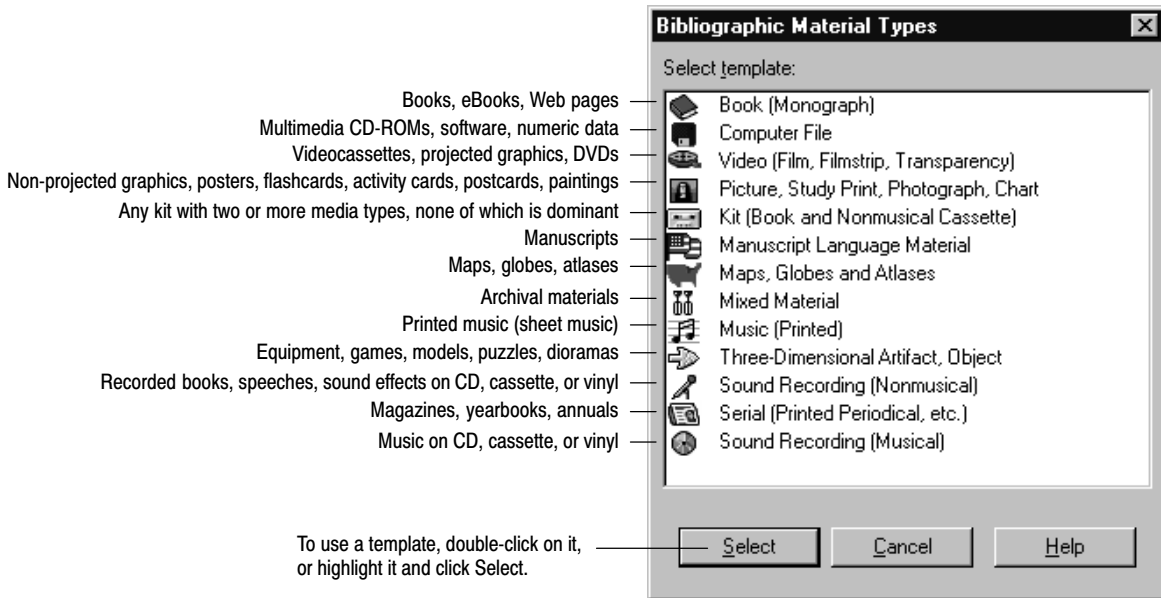
- To add a bibliographic record from scratch, continue with the following section, "Adding new bibliographic records."
- To duplicate the selected bibliographic record, from the selection list or MARC View window (see pages 248 and 249), select File | Add Title | MARC. Or if the MARC Editor is selected as your preferred editor, click + Title (see "Setting up miscellaneous Cataloging options" on page 55). A message appears, giving you the option to duplicate the selected record. Select Yes. The record opens in the MARC Editor window. Continue with "The MARC Editor: an overview" on page 265.
- To edit a bibliographic record, from the MARC View window (see page 249), select File | Edit Title | MARC. Or if the MARC Editor is selected as your preferred editor, click Edit (see "Setting up miscellaneous Cataloging options" on page 55). The record opens in the MARC Editor window. Continue with "The MARC Editor: an overview" on page 265.

See also: Instructions for cataloging some common non-book materials, from audiovisual materials to Web sites, are located in Chapter 28, "Cataloging tips."

Adding new bibliographic records

To add a bibliographic record from scratch, you first need to select a template for the title information.

From the selection list or MARC View window (see pages 248 and 249), choose File | Add Title | MARC. Or if the MARC Editor is selected as your preferred editor, click + Title (see “Setting up miscellaneous Cataloging options” on page 55). If a message appears giving you the option to duplicate the selected record, select No. The Bibliographic Material Types dialog appears:



Select the template that most closely matches the item you’re cataloging. The MARC Editor window opens with the template’s default information. Continue with the following section, “The MARC Editor: an overview.”

See also: For information about customizing templates, see Appendix C, “Bibliographic and authority templates.”

See also: If you are cataloging eBooks, please see page 360 for requirements and instructions.

The MARC Editor: an overview

With the MARC Editor window opened, you're ready to enter or edit the record's information. The MARC Editor organizes the MARC record into tags and their subfields:

Insert a new tag or delete the current tag and its subfields (see page 267).

Insert or delete a single subfield (see page 274).

Find Headings button (cursor in Author field)

MARC Editor has its own toolbar.

Tag descriptions

Tag numbers

Indicator buttons (see page 274)

Subfield codes

Subfield data

For help with a specific tag, put your cursor anywhere in the tag's subfield data and click Help.

Note: Tag-specific help is not available for the MARC Editor on Mac OS.

Shows your cursor's position and provides descriptions of the tag and subfield

The following sections provide information for working with the MARC record's tags, including instructions for adding and deleting tags and subfields, editing fixed-length tags, modifying indicators, and entering information in the subfields of variable-length tags.

See also: For more specific information on cataloging non-book materials such as audiovisual equipment, vertical file material, videorecordings, and electronic resources, see Chapter 28, "Cataloging tips," starting on page 353.

What is a "good" bibliographic record?

When creating a bibliographic record, the amount of information you include depends on your objectives and the tag range you defined in System Setup (see "Defining the tag range for your brief MARC records," page 54).

If you plan to recon records using Alliance Plus (see Chapter 31), you can enter the briefest of brief records, consisting of the title tag, at least one standard number (LCCN, ISBN, or ISSN), and any other required tags.

Note: The template you're using may require entries in certain tags before you can save the record. (For information on changing a template's required tags, see Appendix C, "Bibliographic and authority templates.")

Brief records contain enough information to let you circulate the item. However, they lack detail, which can make them difficult to locate during a search. Additionally, brief records may not have enough information to prevent them from being duplicated during Cataloging's import process.

Full records provide a greater level of detail, including the fields for brief records plus subject headings and notes. You might also consider following the CEMARC (Curriculum-Enhanced MARC) standard. CEMARC records include curriculum objectives along with grade level and target audience information.

The following table shows the suggested minimums for these three record types:

| Information needed | Tag number | Brief | Full | CEMARC |
|--|------------------|-------|------|--------|
| Standard number (LCCN, ISBN, or ISSN) | 010, 020, or 022 | • | • | • |
| Title, medium, statement of responsibility | 245 | • | • | • |
| Imprint (place, publisher/producer, date) | 260 | • | • | • |
| Physical description (units, size) | 300 | • | • | • |
| Author (if applicable) | 1XX | | • | • |
| Variant titles (if applicable) | 246 | | • | • |
| Series (if applicable) | 440 | | • | • |
| Subject-related index terms | 6XX | | • | • |
| Other authors or responsible parties | 7XX | | • | • |
| Review (if applicable) | 520 | | | • |
| Target audience | 521 | | | • |
| Curriculum-related index terms | 658 | | | • |

Cataloging does have the following size limitations for bibliographic records; however, it's possible that you may never exceed some of them:

| Record component | Maximum |
|-------------------------------|--------------------------|
| Record length | 10,240 characters |
| Tags and subfields per record | 256 tags, 1024 subfields |
| Single tag length | 2048 characters |
| Copies per record | 4000 copies |

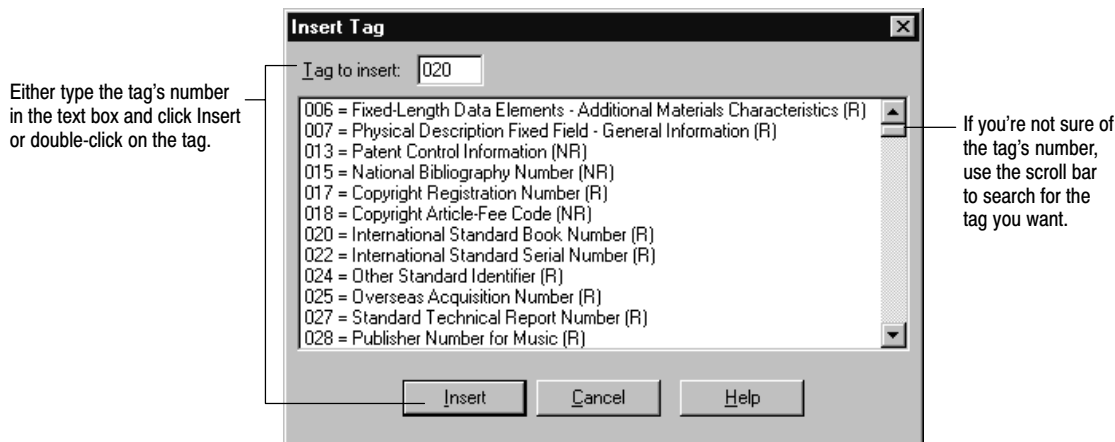
Tags: the backbone of a MARC record

Every MARC record contains fixed-length tags and variable-length tags (usually just called tags). By choosing the template that matches your material type, you

will find that many of the tags you need are already listed. From that starting point, you can add tags as you need them. (For a complete listing of the tags recognized by Cataloging, see Appendix B, “Bibliographic and authority tags.”)



To insert a tag, position your cursor above the desired insertion point and click the Insert tag button, or select Tag | Insert Tag. The Insert Tag dialog lists all the repeatable (R) tags and all of the unused nonrepeatable (NR) tags:



Warning: Cataloging supports importing and exporting holdings data in the 852 tag. But don't add 852 tags for your copy information. The copy editor, accessed from the MARC View window, provides you with a much easier way to enter the information (see Chapter 24, “Working with copies”). Upon export, Cataloging places that copy information in 852 tags.



If you inserted a tag in the wrong place, you can always delete it. Likewise, if you base a new record on an existing one, and it contains information you don't need, you can delete the data a tag at a time.

Note: If a tag is required, the delete option is unavailable. For example, a 245 tag is always required in bibliographic records and can't be deleted. (Required tags are specified in the Template Editor; see Appendix C, “Bibliographic and authority templates.”)

Don't bother deleting unused tags. When you save the record, unused tags don't take up any extra space, and any tags that you added but didn't use are removed. Besides, if a tag is a default selection for the template, that tag always appears when you open the record in the MARC Editor.

To delete a tag, place the cursor in any subfield for that tag and click the Delete tag button, or choose Tag | Delete Tag, and then confirm that you really want to delete it.

Bibliographic fixed-length tags

As the name implies, fixed-length tags have a pre-defined number of spaces. Each space (or position) in a fixed-length tag has a specific meaning. For example, positions 35-37 of the 008 tag contain an item's 3-digit language code.

Normally, the fixed-length tags (000-009) won't require much modification. Even when you add a fixed-length tag to a record, Cataloging uses the record's template to supply the most common settings for that material type. However, some templates are used for multiple material types. For instance, if you use the video template to catalog a filmstrip, you'd have to edit the fixed-length tags because they are set up for videos. Similarly, the template for maps, globes, and atlases defaults to maps.

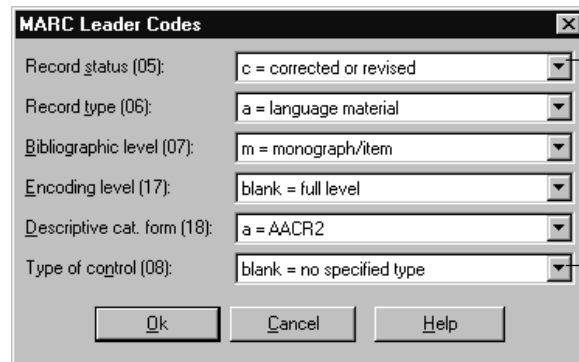
The fixed-length tags you can edit are the Leader, 006, 007, and 008 tags. The 001 (Control Number), 003 (Control Number Identifier), and 005 (Date and Time) tags generate automatically when you save a record and are display only.

See also: For information about authority fixed-length tags, see page 281.

Leader tag

The Leader contains a record's processing data. Cataloging provides most of this information automatically. It usually isn't necessary, but you can change the default codes for record status, record type, bibliographic level, encoding level, descriptive cataloging form, and type of control.

To change the Leader, double-click in the Leader data, or choose Tag | Edit Leader. The MARC Leader Codes dialog appears:

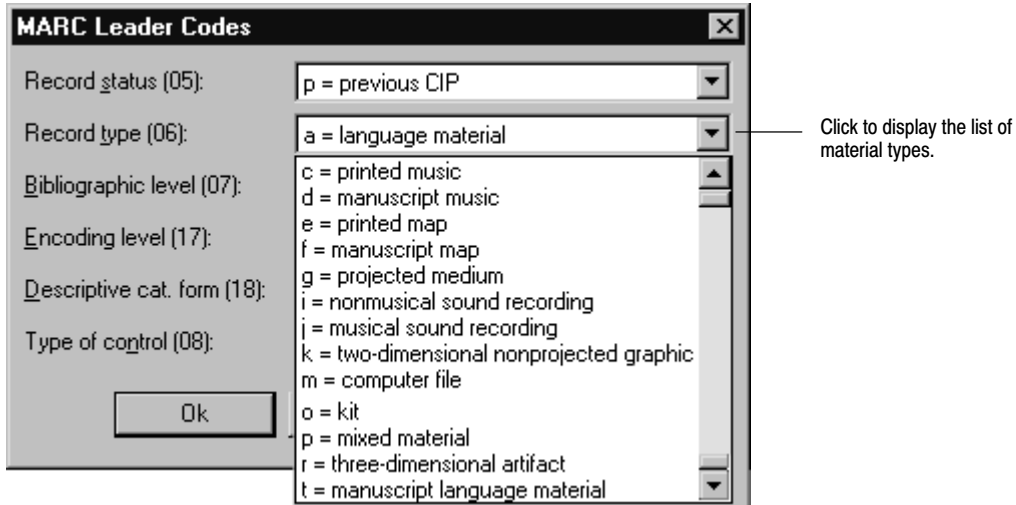


Select the appropriate values from the drop-down lists, and click OK.








Changing the material type (and its display icon)








The material type of an item is identified by the entry in position 6, Record type, in the Leader tag. If you choose the template that matches your material type, position 6 contains the correct entry, and the correct material type icon displays in all the Follett applications.

To change the material type and its icon, access the MARC Leader Codes dialog as instructed above, and select the correct Record type (06) from the list:

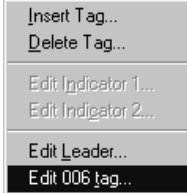


To choose the right one, use the following table:

| Record type code | Material type | Uses | Its icon |
|------------------|----------------------------|---|---|
| a | language material | monographic textual items: books, eBooks, Web pages, that are bound, electronic, or microform |  |
| | | <i>Note:</i> For eBooks, Web pages, and other electronic resources, also change Form of item, position 23, in the 008 tag to s = electronic form . |  |
| | | <i>Note:</i> For serials (periodicals, newspapers, yearbooks), also change Bibliographic level, position 7, of the Leader to s = serial . |  |
| c | notated music and | sheet music |  |
| d | manuscript notated music | | |
| e | printed maps and | maps, globes, atlases, digital maps |  |
| f | manuscript maps | | |
| g | projected medium | films, filmstrips, videocassettes, projected graphics, DVDs |  |
| i | nonmusical sound recording | recorded books, speeches, sound effects, on CD, cassette, or vinyl |  |

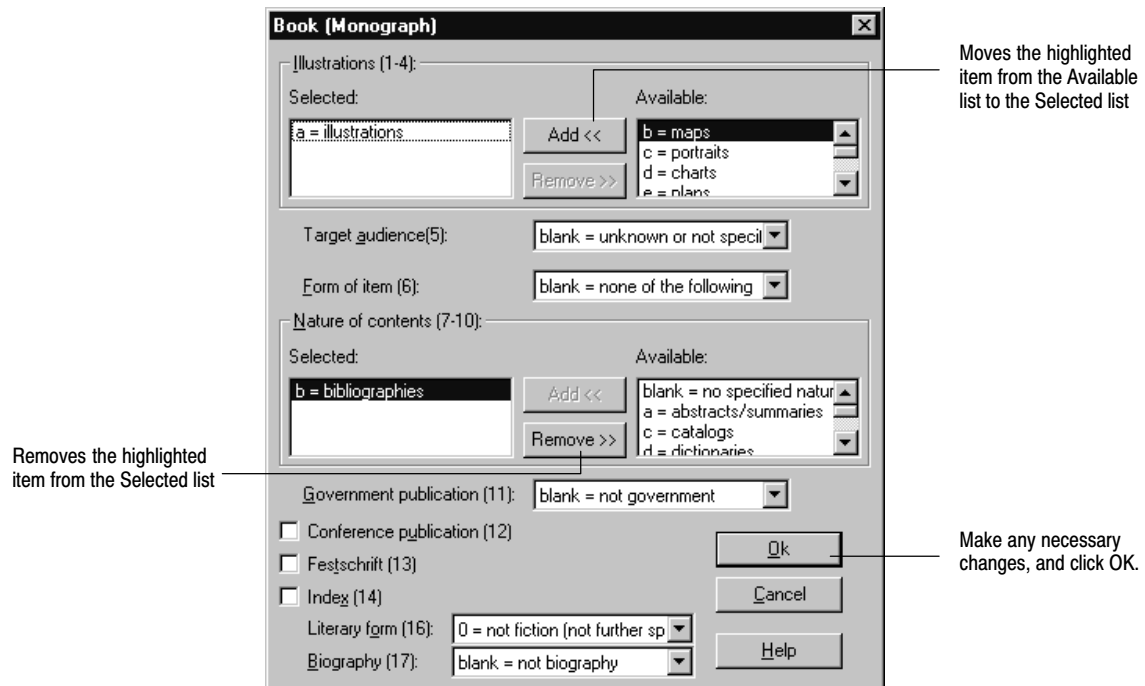
| Record type code | Material type | Uses | Its icon |
|-------------------------|--------------------------------------|---|---|
| j | musical sound recording | music on CD, cassette, or vinyl |  |
| k | two-dimensional nonprojected graphic | activity cards, charts, drawings, flash cards, paintings, photographs, pictures, postcards, posters, prints, study prints, technical drawings |  |
| m | computer file | software, numeric data, multimedia, online systems or services |  |
| o | kit | any kit with two or more media types, none of which is dominant |  |
| P | mixed material | materials in two or more forms that are usually related; archival fonds, manuscript collections |  |
| r | three-dimensional artifact | models, dioramas, games, puzzles, sculptures, exhibits, equipment, machines, microscope specimens, clothing, toys |  |
| t | manuscript language material | monographic textual items that are in manuscript form. |  |

When you close the MARC Leader Codes dialog, a message may inform you that you need to modify the 008 tag. The 008 tag is a fixed-length field and has 40 positions. Positions 18 through 34 are different for each material type. Go to page 272 for instructions on editing the 008 tag, and, if you would like further information on cataloging non-book materials, see page 353.

Tag**006 tag**

The 006 tag is a repeatable material type tag that lets you identify accompanying materials or an item with multiple characteristics (for example, an item that is both a map and a puzzle).

By default, the 006 tag isn't included in any of the bibliographic templates. To add it, position your cursor above the desired insertion point and click the Insert tag button, or select Tag | Insert Tag. On the Insert Tag dialog that appears, enter **006** and click Insert. The Bibliographic Material Types dialog appears (see page 264). Select the material type you want to use. (If you're editing an existing 006 tag, double-click in the 006 data, or with your cursor in the 006 field choose Tag | Edit 006 tag.) A dialog containing the options for the selected template appears:



Tag

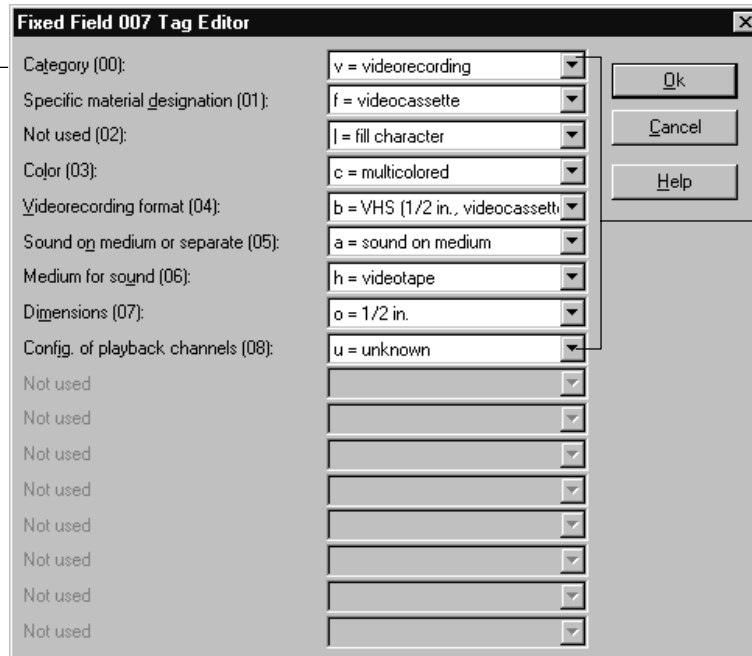


007 tag

The 007 (Physical Description) tag is an optional, repeatable tag. Some bibliographic records have multiple 007 tags, while some audiovisual material records have none. The information in the 007 tag must agree with the 008 tag, and vice versa.

By default, the 007 tag isn't included in any of the bibliographic templates. To add it, follow the instructions on page 267. (If you're editing an existing 007 tag, double-click in the 007 data, or with your cursor in the 007 field, choose Tag | Edit 007 tag.) The Fixed Field 007 Tag Editor dialog appears:

The number of editable positions in the 007 tag depends on the category (position 00). For example, if you change the category from "videorecording" to "motion picture," there are 22 editable positions.



Select the appropriate value for each position, and click OK.

The default category is based on the template you're using. You'll only need to change the category if the template can be used for multiple material types (e.g., the video or map template).

Tag

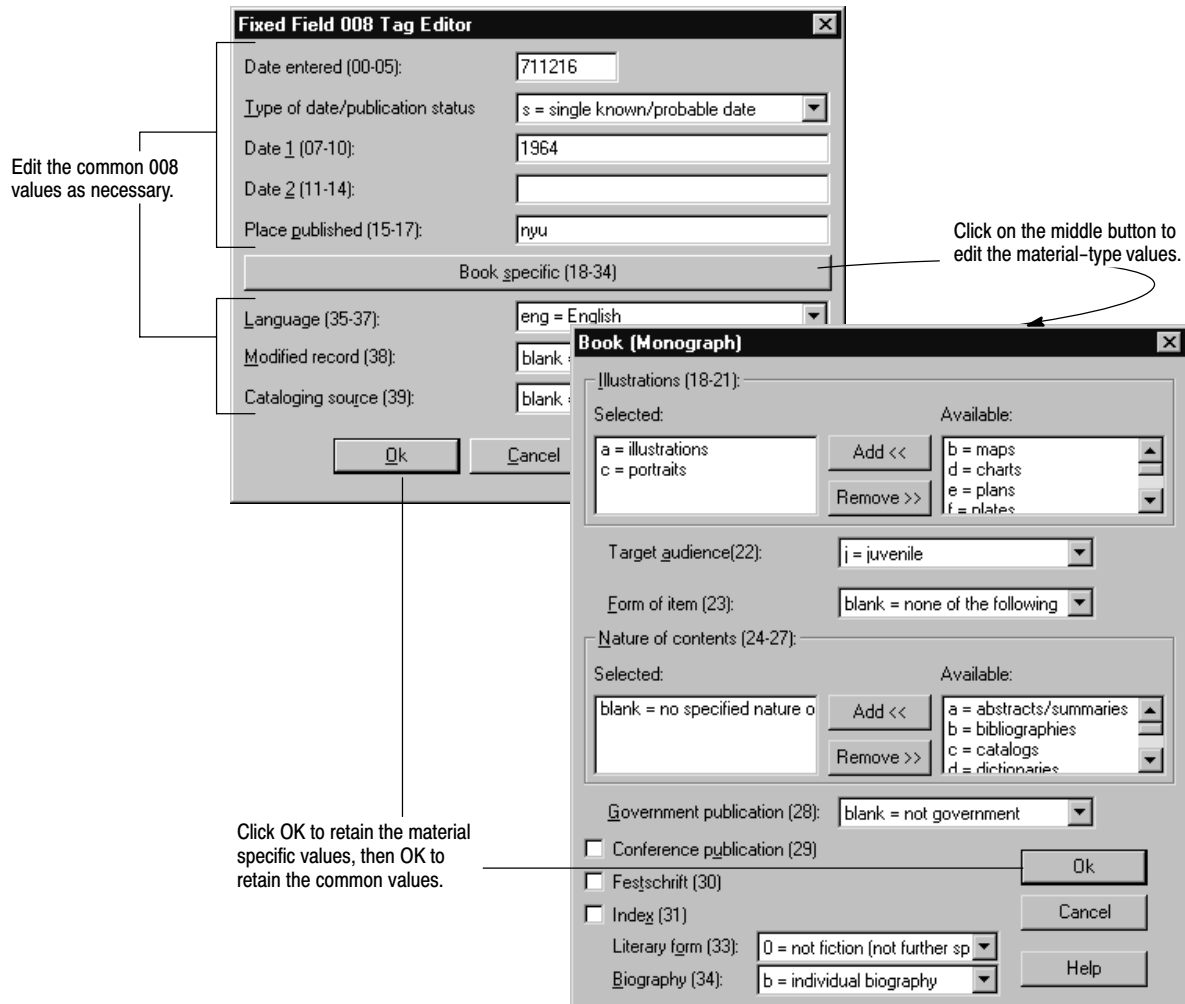


008 tag

The 008 (Fixed Data) tag has 40 character positions. Positions 00 through 17, and 35 through 39, contain general information about the item and appear in all material types. Positions 18 through 34 are material-type specific and must agree with the contents of the Leader and the 007 tag.

Important: Cataloging, Reports, and OPAC look for publication dates in the 008 tag. (All records should have a 008.) If the 008 tag has a blank publication date field, the applications look in subfield c of the 260 tag. If no date is found in either location, they assume the record does not have a publication date. Searches that are limited by publishing year do not find these titles.

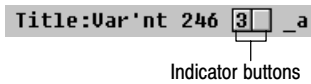
To edit the 008 tag, double-click in the 008 data, or with your cursor in the 008 field, choose Tag | Edit 008 tag. The Fixed Field 008 Tag Editor dialog appears:



If you are changing the material type of an item and have changed the Record Type in the Leader, click the "<material type> Specific (18-34)" button. Check the position for Form of item or Type of material and edit as necessary. Also look for any occurrence of "invalid item" and select the entry that applies to the material you are cataloging. If necessary, set these positions to "Not specified" or "Unknown." When you are finished, click OK (twice) and save and close the record.

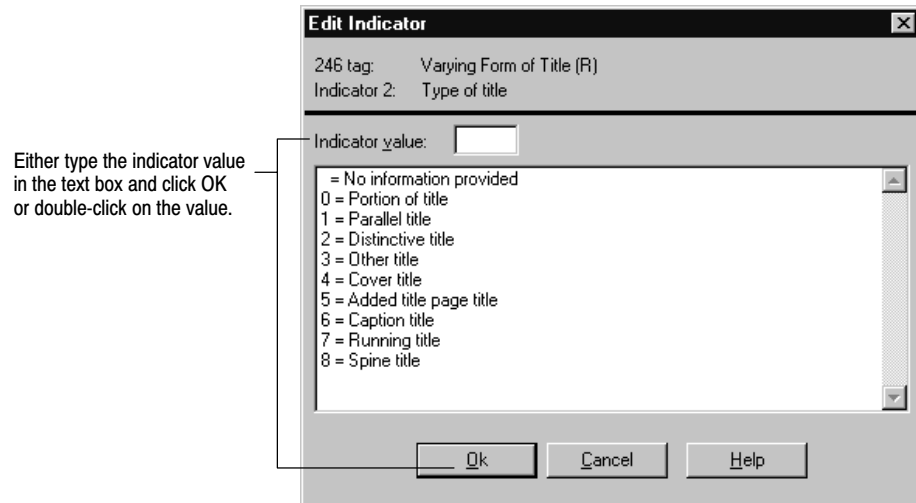
Variable-length tags

When you're using the MARC Editor, you'll typically be working with the variable-length tags (010-9XX): editing indicators, inserting or deleting subfields, and working with the data in the subfields.



Editing indicators

To edit a tag's indicator, click on the indicator button. (If there are no defined values for that indicator, a message appears asking if you want to proceed.) The Edit Indicator dialog appears:



Be sure to set the indicator for any nonfiling characters. This ensures that the application skips the leading article (a, an, the) and indexes the title correctly so that it is easily found during searches. This is especially important if you selected to remove articles in search terms (see "Setting up miscellaneous Cataloging options" on page 55).

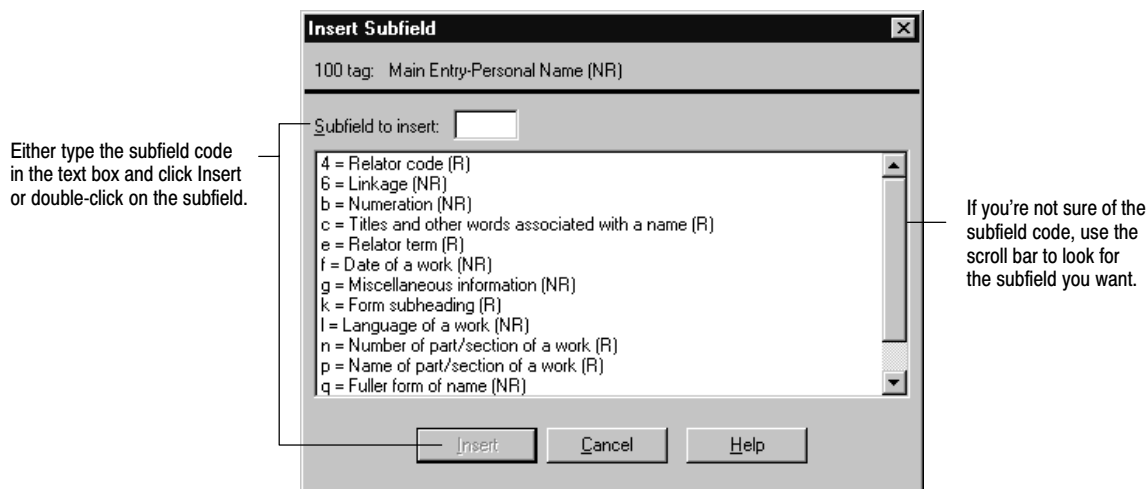
Common tags that have nonfiling-character indicators are the 245, 240, and 440 (2nd indicator), and the 130, 730, and 740 (1st indicator). When entering the number of nonfiling characters, include the space that follows the leading article. For example, *The Yearling* has 4 nonfiling characters (T, H, E, space).

Inserting and deleting subfields

The information in variable-length tags is divided into subfields. The template you're using includes the most common subfields for each tag. From that starting point, you can insert subfields as you need them.



To add a subfield to a tag, position your cursor in the tag and click the Insert subfield button, or select Subfield | Insert Subfield. The Insert Subfield dialog lists all of that tag's repeatable (R) subfields and all the unused nonrepeatable (NR) subfields:



Note: Depending on your cursor's position, you may receive a message asking you to confirm the placement of the subfield.



If you inserted a subfield in the wrong place, you can always delete it. Likewise, if the data in a subfield becomes unnecessary, you can delete the subfield. However, if there is only one subfield left in a tag, the only way to delete it is by deleting the tag (unless the tag is required; see page 267).

Don't bother deleting unused subfields. When you save the record, unused subfields don't take up any extra space, and any subfields that you added but didn't use are removed. Besides, if a subfield is a default selection for the template, it always appears when you open the record in the MARC Editor.

To delete a subfield, place the cursor in the subfield and click Delete subfield, or choose Subfield | Delete Subfield, and then confirm your decision.

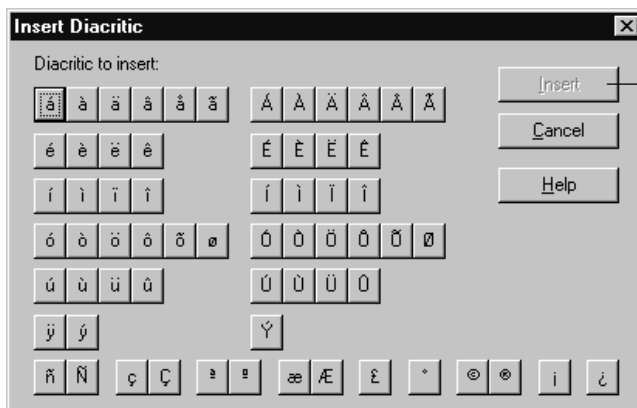
Working with subfield data

You modify subfield data just as you would the text in any document. Simply place your cursor in the subfield and type your changes. The MARC Editor automatically wraps the text within a subfield.

Note: When you edit data, all of the common text-editing commands are available from the Edit menu, including an Undo command for your last editing action. You can only select the contents of one subfield at a time. If you try to paste in more text than the tag can hold (see the record size limit table on page 266), a message appears and the excess is truncated.



If you need to, you can also add diacritics and other common symbols to your subfield data. To insert a diacritic or symbol, place your cursor where you want the diacritic, then click the Diac's button or select Edit | Insert Diacritic. The Insert Diacritic dialog appears:



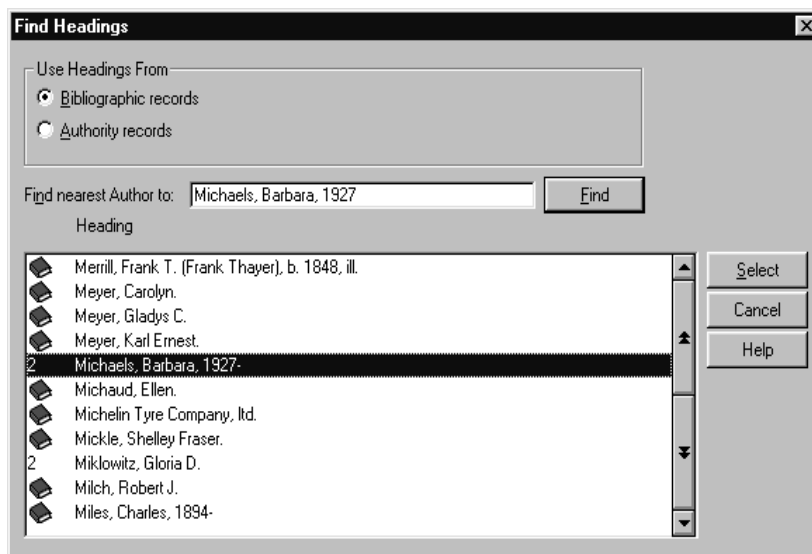
Select the character you want and click Insert.



Using the Find Headings feature

To create consistency in your collection, Find Headings allows catalogers to quickly retrieve a list of existing author, subject, or series headings. The Find Headings button becomes enabled whenever you are in an author, subject, or series field within the MARC Editor.

Note: Find Headings is not available on Mac OS.



To use Find Headings from the MARC Editor, you must have your cursor on an Author, Subject, or Series field. If there is already data in the Author, Subject, or Series field, it appears in the Find nearest text box.

1. Click the Find Headings button. This populates the list of headings from which to choose.

2. If there is already data in the Author, Subject, or Series field, it appears in the Find nearest text box.
If the Find nearest text box is empty, enter your search text to search for an author's name, a subject heading, or series name, and press the Find button. A list of headings appears.
3. Highlight the desired heading in the list. Click Select to copy all of the heading's subfields to your MARC record.

Important: Selecting a heading *overwrites* any information in the tag that you may have entered before selecting the heading.

What's next?



After making all the necessary changes to a record, click Save or choose File | Save Record. When you save a bibliographic record, Cataloging checks for the 008 and 245 tags, and any other required tags. It also verifies that the standard numbers (LCCN, ISBN, ISSN) are formatted correctly and that you haven't inadvertently duplicated a standard number from another record.

After saving the record:

- If you are cataloging a new title, you'll need to add copy information. See Chapter 24, "Working with copies."
- Print a proof sheet of the record from the MARC Editor. A proof sheet shows all the tag, indicator, and subfield information, which is useful for checking your own or someone else's work. To print, select Print from the File menu.
- If you aren't creating keywords as you save records (see "Setting up miscellaneous Cataloging options," page 55), once you've finished cataloging, update your keywords. For more information, see page 345.



To leave the MARC Editor window, click Close.

See also: For information on deleting MARC records, see page 252.

Working with authority records

In everyday conversation and writing, we refer to people, physical objects, and abstract concepts by different names. For example, cars can be called automobiles or motor-cars. If entries into a library catalog were this random, it would be nearly impossible to find everything on a given subject or by a certain author.

The solution is the use of authorized headings. One term or form of a name is selected as “preferred,” meaning that all related catalog entries should use that heading. Typically, this decision is made by the national library, or the library assuming its role, or by private publishers (e.g., Library of Congress or Sears).

Each authority record contains a single authorized heading (1XX tag). It also contains unauthorized headings (4XX tags), related authorized headings (5XX tags), and/or electronic resource information (856 tags).

See also: You can use the 856 tags in authority records to create “virtual” Elec. Access hyperlinks in the OPACs, Cataloging (OPAC Display only), and WebCollection Plus. For information about the 856 tag and virtual electronic resources, see pages 355 and 358, respectively.

Creating cross-references

If a bibliographic record uses the authorized heading in an indexed subject, author, or series heading, Cataloging can use the tracing information in the authority record’s 4xx and 5xx tags to create cross-references in the OPACs, WebCollection Plus, and Cataloging.

When a user searches for an unauthorized heading, a “SEE” reference to the authorized heading appears in the selection list. If a user searches for a related heading, a “SEE ALSO” reference to the authorized heading appears.

Example: Suppose your collection contains bibliographic records with the subject heading “Folklore” and the following authority record:

```
150 _a Folklore
450 _a Folk beliefs
550 _a Mythology
```

A subject search for “Folk beliefs” results in “Folk beliefs SEE: Folklore.” If your collection includes at least one bibliographic record with the subject heading “Mythology,” a subject search for “Mythology” will result in the option to view that record. However, the results will also include the suggestion “Mythology SEE ALSO: Folklore.” In both cases, the cross-references point to the bibliographic records that use “Folklore” as a subject heading.

See also: For more information on creating cross-references, see “008 tag” on page 281 and “Fine tuning cross-references” on page 283.

Getting started

Before you can update or duplicate an existing authority record, or create a new one, you’ll either need to locate the record or verify that it doesn’t already exist. For searching instructions, see “Finding MARC records...” on page 240. Or, to

quickly locate a record, use the Find Headings button in the MARC Editor to search the existing authority headings for an author, subject, or series.

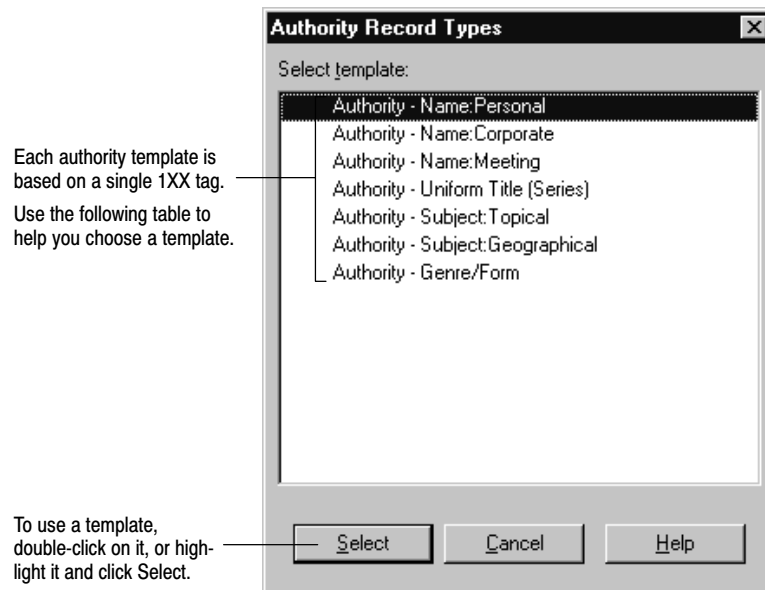
- To add an authority record from scratch, continue with the following section, “Adding new authority records.”
- To duplicate the selected authority record, from the selection list or MARC View window (see pages 248 and 249), select File | Add Authority or click + Authority. A message appears, giving you the option to duplicate the selected record. Select Yes. The record opens in the MARC Editor window (see page 265). Continue with “How are authority records different?” on page 280.
- To edit an authority record, from the MARC View Window (see page 249), click Edit, or select File | Edit Authority. The record opens in the MARC Editor window (see page 265). Continue with “How are authority records different?” on page 280.

Note: If you are running Union Catalog Plus with Data Exchange Server (DX), please note that DX does not automatically exchange authority records. If you add or update your authority records and want to share them with your members, you must manually export and distribute them. For instructions, see “Exporting authority records” on page 318.

Adding new authority records

To add an authority record from scratch, you first need to select a template for the authority information.

From the selection list or MARC View window (see pages 248 and 249), choose File | Add Authority or click + Authority. If a message appears giving you the option to duplicate the selected record, select No. The Authority Record Types dialog appears:



The following table shows the relationship between the authority templates, their authority tags, and some of the bibliographic tags they parallel. Some terms can have multiple applications in bibliographic records. For example, Elizabeth Smith can be the author or subject of a book. Topical, geographic, and genre terms aren't usually used as author or uniform title entries.

| Authority template | Contains authority tag | Parallels bibliographic tags |
|-------------------------------|--|--|
| Name: Personal | 100 Personal Name (e.g., Smith, Elizabeth Jones) | 100 Main Entry Personal Name 600 Subject Heading Personal Name 700 Added Entry Personal Name 800 Series Added Entry Personal Name |
| Name: Corporate | 110 Corporate Name (e.g., Follett Software Company) | 110 Main Entry Corporate Name 610 Subject Heading Corporate Name 710 Added Entry Corporate Name 810 Series Added Entry Corporate Name |
| Name: Meeting | 111 Meeting Name (e.g., Centennial Exhibition) | 111 Main Entry Meeting Name 611 Subject Heading Meeting Name 711 Added Entry Meeting Name 811 Series Added Entry Meeting Name |
| Uniform Title (Series) | 130 Uniform Title (e.g., New York Times) | 130 Main Entry Uniform Title 440 Series Statement Added Entry 490 Series Statement 630 Subject Heading Uniform Title 730 Added Entry Uniform Title 830 Series Added Uniform Title |
| Subject: Topical | 150 Topical heading (e.g., Schools) | 650 Subject Heading Topical Form |
| Subject: Geographical | 151 Geographical name heading (e.g., Mississippi River) | 651 Subject Heading Geographic Term |
| Genre/Form | 155 Genre/Form heading (e.g., Cartoons) | 655 Index Term-Genre/Form |

See also: For information about customizing templates, see Appendix C, "Bibliographic and authority templates."

When you select a template, the MARC Editor window opens with the template's default information (see page 265). To enter an authority record, continue with the following section.

How are authority records different?

Just like bibliographic records, authority records contain both fixed-length and variable-length tags. By choosing the template that matches your needs, you'll find most of the tags you need are already listed. From there, you can add tags as you need them (see "Tags: the backbone of a MARC record" on page 266).

The mechanics of entering or editing authority data in the variable-length tags is virtually identical to working with bibliographic data (see "Variable-length tags,"

page 273). However, as described in the following sections, authority records have a few special considerations when it comes to fixed-length tags and cross-reference creation.

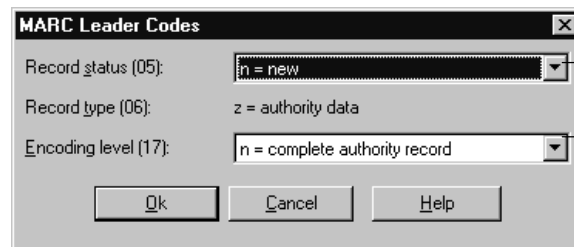
Authority fixed-length tags

These authority fixed-length tags are slightly different than the bibliographic tags with the same names.

Leader tag

The Leader contains a record's processing data. Cataloging provides most of this information automatically. It usually isn't necessary, but you can change the default codes for record status and encoding level.

To change the Leader, double-click in the Leader data, or choose Tag | Edit Leader. The MARC Leader Codes dialog appears:



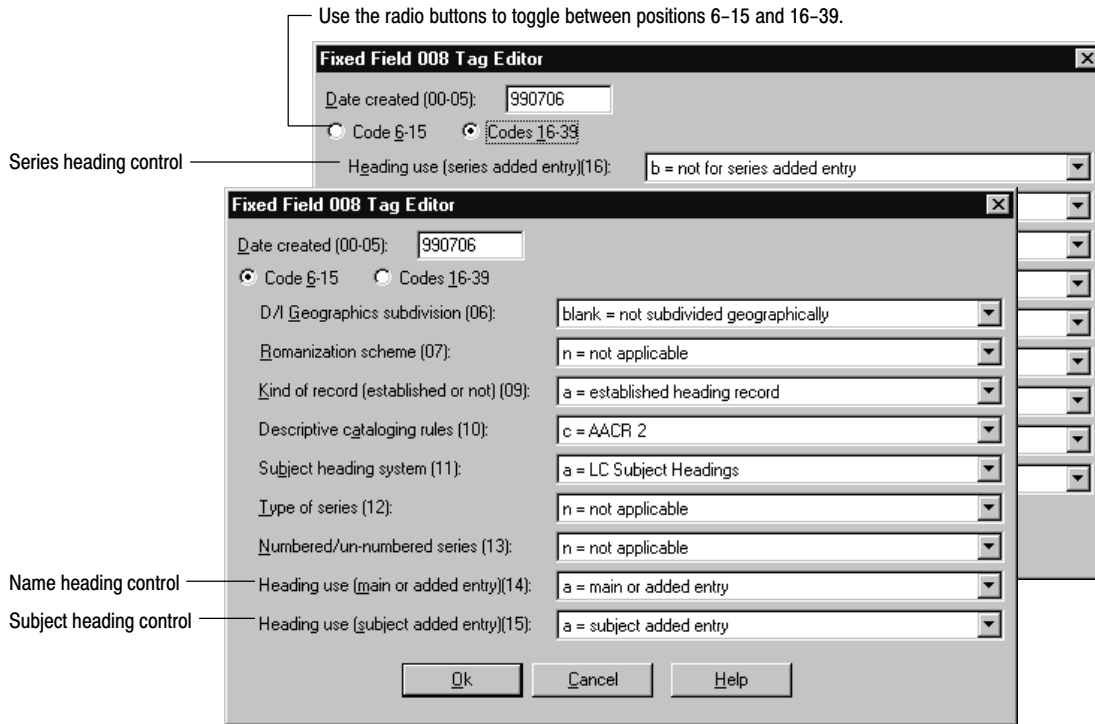
Select the appropriate values from the position lists, and click OK.



008 tag

The 008 tag provides coded information about the entire record and about certain aspects of the 1XX heading and 4XX/5XX tracing fields. Normally, the 008 tag won't require any modification. Cataloging uses the record's template to supply the most common settings.

To edit the 008 tag, double-click in the 008 data, or with your cursor in the 008 field, choose Tag | Edit 008 tag. The Fixed Field 008 Tag Editor dialog appears:



Part of the 008 tag’s function is to determine how the authority record should be used when creating cross-references. Code “a” in any of positions 14–16 means that the record is appropriate for the particular use; code “b” means it is not.

Example: Consider the following authority record:

100 _a Smith, Elizabeth Jones.
 400 _a Jones-Smith, Elizabeth.
 500 _a Smith, Elizabeth.

If positions 14–16 of the 008 tag are coded “aab,” a search for the author or subject “Jones-Smith, Elizabeth” results in “Jones-Smith, Elizabeth SEE: Smith, Elizabeth Jones.” Author and subject searches for “Smith, Elizabeth,” will include the cross-reference “Smith, Elizabeth SEE ALSO: Smith, Elizabeth Jones.”

On the other hand, if positions 14–16 of the 008 tag are coded “abb,” the cross-references would only appear in searches for the author.

Important: Any changes made to positions 14–16 affect all the cross-references generated by a record. To modify a single cross-reference in a record, see “Fine tuning cross-references” on page 283.

Entering authority information

Every authority record must contain information in a 1XX tag (the authorized heading) and can contain multiple 4XX (SEE) and 5XX (SEE ALSO) tags with tracing information. (For instructions on working with variable-length tags and subfield data, see page 273.)

If a bibliographic record uses the authorized form in an indexed subject, author, or series heading, Cataloging can use the tracing information in the authority record to create cross-references.

Important: Cross-references are created automatically if you choose to create them as authority records are saved (see “Setting up miscellaneous Cataloging options,” page 55). However, in order to create a cross-reference, the bibliographic record must exist when the authority record is saved.

Whenever you do significant maintenance to your database, you’ll need to rebuild your cross-references to ensure that they stay accurate (see “Rebuilding cross-references,” page 346).

See also: For information about authority tags or to see which bibliographic tags are indexed by Cataloging, see Appendix B, “Bibliographic and authority tags.”

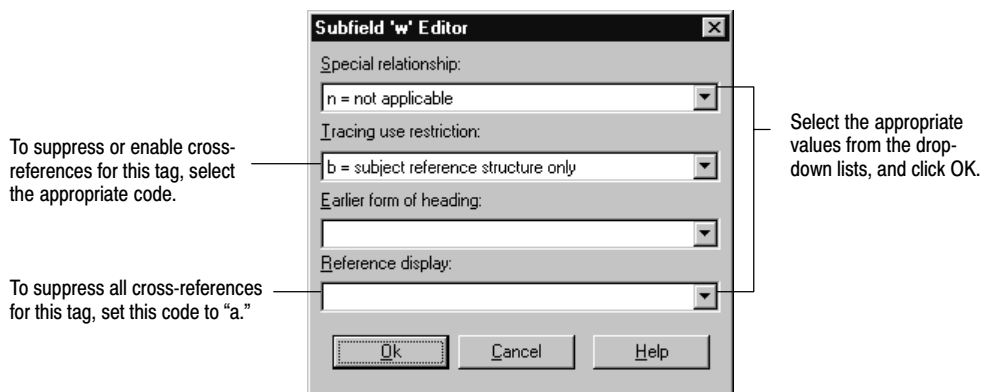
Fine tuning cross-references

As explained on page 281, positions 14–16 of the 008 tag define how Cataloging uses the authority record to create cross-references. You can create exceptions for individual 4XX/5XX tags by adding the Control subfield `_w` to a tag and making some minor modifications.

Note: Control subfield `_w` is only available for 4XX/5XX tags.

By default, subfield `_w` isn’t included. To add subfield `_w` to a 4XX/5XX tag, use the instructions on page 275. It is accepted cataloging practice to put subfield `_w` first in the tag. (To edit an existing subfield `_w`, double-click the subfield data, or with your cursor anywhere in the tag, choose Subfield | Edit subfield ‘w’.)

The Subfield ‘w’ Editor dialog appears:



Note: The four coded positions in subfield `_w` are filled from the left. If you don’t select codes for the leading positions, the system automatically fills them with “n” (not applicable) when you click OK.

Example: Consider the example on page 282. To limit the SEE ALSO reference to author searches without affecting the other cross-reference, you would add subfield `_w` to the 500 tag, and in the Tracing use restriction drop-down list, select “a = Name reference structure only.”

If you wanted to suppress all cross-references from that tag, from the Reference display drop-down list you would select “a = Reference not displayed.” Now the related heading is recorded in the authority record, but is not cross-referenced in Cataloging or OPAC.

What's next?



After making all the necessary changes to a record, click the Save button or choose File | Save Record. When you save an authority record, Cataloging checks for the 008 and 1XX tags. It also verifies that you haven't inadvertently duplicated an authority heading from another record.

After saving the record:

- Print a proof sheet of the record from the MARC Editor. A proof sheet is useful for checking your own or someone else's work. It shows all the tag, indicator, and subfield information. To print, select Print from the File menu.
- If you aren't creating cross-references as you save (see “Setting up miscellaneous Cataloging options” on page 55), once you've finished cataloging, rebuild your cross-references. For more information, see page 346.
- Verify that your cross-references are appearing as you intended by searching the appropriate index (author, subject, or series) for your 4XX/5XX entries.



To leave the MARC Editor window, click Close.

See also: For information on deleting MARC records, see page 252.

Chapter 24 Working with copies

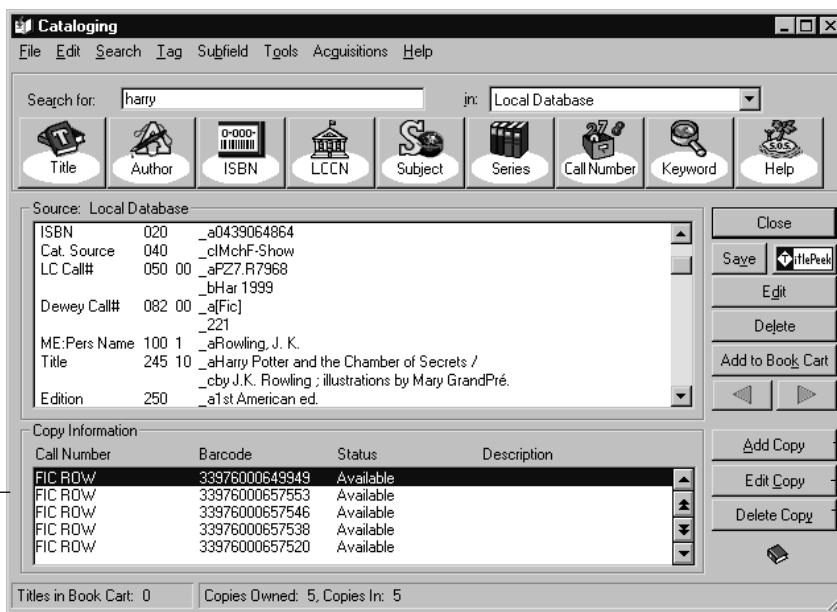
Each item in the library—book or otherwise—needs a place to store its unique information, such as the copy barcode and call number. The Copy Editor provides you with an easy way to enter and maintain copy information. This chapter provides instructions for adding, editing, and deleting individual copies.

Note: If you need to modify the same information in several copies, you may want to use Cataloging's other copy update options, which are described in Chapter 27, "Maintaining your collection."

Adding and editing copies

Whether you're adding the first copy to a new bibliographic record, adding additional copies to an existing record, or modifying a copy's information, you start by displaying the bibliographic record for the item in the MARC View window.

If you just saved a new bibliographic record, you're already there; otherwise, you must locate the record (see "Finding MARC records..." on page 240). From the MARC View window, you can add, edit, or delete copy information:



For Union Catalog Plus, the Copy Information window contains a Member column and omits the Copy Status column. For more information see page 250.

To add a new copy from scratch or by replicating the highlighted copy, click Add Copy.

To make changes to a copy, highlight it and click Edit Copy.

To ensure that you have the right copy, check the call number and barcode.

To delete the highlighted copy, click Delete. For more information see page 288.

Note: You can't add copies to a temporary title. You can only edit the existing copy. (See "Permanent or temporary?" on page 234.)

If a title already has a copy, you can choose to duplicate (replicate) the highlighted copy after clicking Add Copy. The duplicate retains most of the original's information and updates the Inventory Status (to Marked), Copy Status (to Available), and Acquisition Date (to today's date).

From the Add or Edit Copy dialog you can add or update the copy's information:

You can scan or type a barcode for the copy, or click Assign Barcode. Assign Barcode assigns the next highest available barcode number (see page 652).
 To ensure accurate reports, remember to leave a space between the call number prefix and the call number, and to define any call number prefixes you use (see page 48).
See also: To create a list of available copy barcodes, see "Generating a Used or Unused Copy Barcodes Report" on page 535.

Type in category numbers (separated by commas) or click the button to open the Copy Categories dialog.

If the copy requires enumeration (Volume, Issue, Number, Year, etc.), select or enter the descriptions here, and then enter the number.

Refers to an area in the library or building

Bibliographic information. The call number is taken from the default call number location you selected in Setup (see page 47).

Displays the copy's recent circulation history and statistics (see page 135)

Select the one that defines this copy's borrowing limits. To define new circulation types, see page 45.

If there is something unique about this particular copy (e.g., the author signed this copy), enter that information here. This note only appears in the Copy Status windows of Circulation Desk.

To alert library staff to special issues regarding this item's circulation (e.g., a CD-ROM is included), enter the information here. This note appears whenever this copy is accessed in Circulation Desk.

Shows the categories assigned to this copy. Each copy can have 8 categories. To remove a category, highlight it and click Remove.

Shows categories that can be assigned to this copy. To assign a category, highlight it and click Add. For more information on categories, see page 52.

Every copy must have a unique barcode and a call number. Use the remainder of the fields as needed. After entering the appropriate copy information, click Save.

In addition to the information on the previous page, there are a few things to keep in mind when adding or editing copies:

- For accurate updates and reports, be sure to leave a space between any call number prefix and the call number.
- You can attach Vendor or Funding Source information to a copy by clicking Select next to each field and choosing from the stored list. To add vendors or funding sources to the lists, click New. See page 61 for complete instructions.
- Be sure to specify a price if you want to include that information on overdue and bill notices (see page 561) or to calculate your collection value accurately (see page 550).
- Copy status is disabled if the copy is At the Bindery, Loaned Out, Lost, Missing, Checked Out, or On Hold. To change the copy status from At the Bindery, Loaned Out, Missing, or Lost, back to Available, check the item in through Circulation Desk.
- If an inventory is in progress, you cannot make changes to the inventory status. If an inventory is not in progress, you can change the inventory status of an Available copy from Marked to Missing.
- You can't change the call number, circulation type, or categories of a temporary copy. You can't export a temporary copy. You also can't change a temporary copy into a permanent one (see "Permanent or temporary?" on page 234). When the temporary copy is checked in, the temporary record is deleted. You can then create a permanent record with copies to replace the temporary record.
- You can't change the inventory status if the circulation type is Non-circulating eBook (*NC). This circulation type is intended for electronic materials. You must change the circulation type first. For more information, see "Grouping your collection according to lending period" on page 45.

For Union Catalog Plus: There are several differences when adding or editing copies for the union catalog:

- When adding a copy, you must specify the member to which the copy belongs. After you click Add Copy, highlight the member from the Select Member dialog that appears, then click Select.
- The member's full site name appears in the title bar in both the Add Copy and the Edit Copy dialogs.
- The Assign Barcode button is not available.

Important: If you catalog new copies at both the union catalog and the member, we recommend that the union catalog and the member assign barcodes in different ranges. This prevents the possibility of assigning the same barcode to different copies.

- Only the selected member's categories can be assigned to a copy.

- The Checkouts button is not available.
- The Description/Enumeration, Vendor, and Funding Source drop-down lists contain the entries of the union catalog, not those of the members.
- The Copy Status drop-down box is not available. The copy status is set to Available when adding a copy.
- The Inventory Status drop-down box is not available. The status is set to Marked when adding a copy.
- The Copy Note and Circulation Note text boxes are not available.

See also: To print new or replacement spine and pocket labels, see “Generating Spine/Pocket Labels” on page 522.

Deleting a copy

When a copy is no longer a part of your collection, you can delete its information. Keep in mind that deleting a copy also deletes its holds, fines, and statistics. Deleting a copy is an irreversible action. However, if you delete a copy with pending transactions, the application generates an exception report listing the copy's barcode, former copy status, and any actions taken on related patron records, including fine amounts.

To delete an individual copy, first locate the record (see “Finding MARC records...” on page 240). From the MARC View window (see page 285), highlight the copy you want to delete, and click Delete Copy. At the message, click Yes.

Warning: Once you verify the deletion, the process can not be stopped or reversed.

See also: If you need to delete several copies at once, and the library has a PHD, see page 342 for instructions.

To delete several copies at once using a scanner, see page 337.

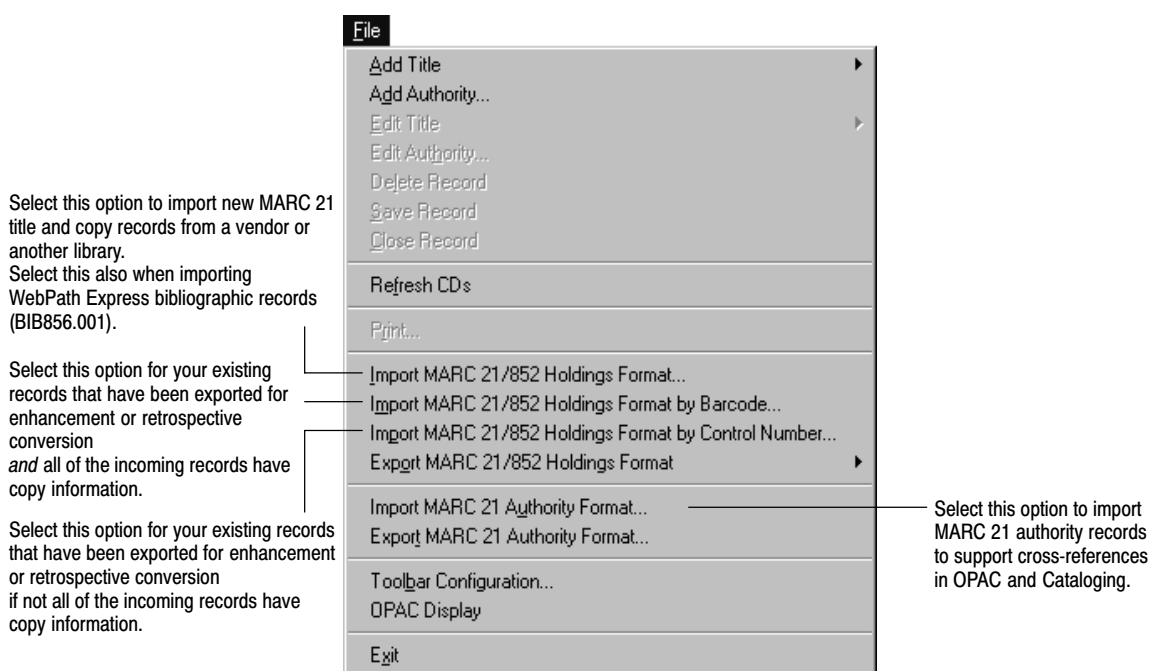
To globally delete copies with copy status of Lost or an inventory status of Missing, see page 330.

To automatically delete a title record when its last copy is deleted, open the System Setup module, select Setup | Cataloging | Misc, and select the Delete Title When Last Copy is Deleted check box. A title record deletion then occurs whether the copy is deleted manually or by a Cataloging feature such as Delete Copies via PHD, Delete Copies via Scanner, Global Delete Lost Copies, or Global Delete Missing Copies. If you manually delete a copy in the MARC View window, before the actual title deletion occurs, a confirmation message appears. This prevents any unintentional deletions while you are cataloging.

Chapter 25 Importing MARC records

This chapter includes instructions for the different methods of importing bibliographic and authority records and interpreting the exception report.

Use the import options on the File menu to transfer MARC records in the MARC 21/852 Holdings format or MARC 21 Authority format:



Note: In 1999, the term *MARC 21* replaced *USMARC*. This change is a result of the harmonization of the U.S. and Canadian formats.

Importing bibliographic records

Cataloging converts your MARC 21/852 Holdings data into bibliographic and copy records as they are imported. Make sure your data vendor is preparing your copy information in the 852 tags as indicated in the following table:

| Subfields in the 852 tag | Copy fields |
|--------------------------|---|
| _a | MARC Organization Code (up to 30 characters) entered in System Setup |
| _b | Sub Location (up to 20 characters) |
| _k, _h, _i, _m | Call Number (up to 30 characters). The subfields are combined in the order shown. |

| Subfields in the 852 tag | Copy fields |
|--------------------------|--|
| <code>_p</code> | Barcode (up to 14 characters) |
| <code>_t</code> | Copy Number (up to 5 characters) |
| <code>_9</code> | Price (up to 10 digits total—8 before a decimal point and 2 after). Prices without a decimal point are considered to have two decimal places (e.g., <code>_9150</code> would appear in the copy record as \$1.50). |
| <code>_x</code> | <p>Your data vendor can use subfield <code>_x</code> (a repeatable, non-public note) for additional copy information. Ask your data vendor to use the following formats:</p> <p>FSC<followed by any or all of the following <code>@</code> codes></p> <ul style="list-style-type: none"> @a Circulation Type code (up to 3 characters). If not included, your default circulation type, or the one selected on the Import Options dialog, is used. Circulation types identify lending periods for copies in the library collection (see page 45). @b Category number (up to 4 characters). Number must be between 1 and 2000, inclusive. Categories are created in the Categories tab (see page 52) under Cataloging setup in System Setup. Each copy can be assigned as many as 8 categories (e.g., a copy with three categories, <code>@b2@b28@b34</code>). @c Acquisition Date (8 characters). Date must be in YYYYMMDD format. @e Volume number (up to 20 characters). Stored in the Description/Enumeration fields. You can also identify a volume number using codes <code>@i</code> and <code>@j</code> below. @f Vendor (up to 30 characters) @i Enumeration (up to 20 characters). Can be repeated up to 3 times. @j Description (up to 20 characters). Can be repeated up to 3 times. <p>Note: Each copy can have up to 3 levels of enumeration, including a volume number. The Description/Enumeration fields are populated in the order the data occurs in the record. For example, a copy with <code>@i2@jVolume@i12@jNumber</code> would show “Volume 2, Number 12” in the first and second Description/Enumeration fields.</p> <p>FUND: Funding Source (up to 24 characters)</p> <p>All FSC data should be in one subfield <code>_x</code> and the FUND information in another.</p> <p>Example: A copy that is part of your summer reading program (category number 2) was added to your database May 4, 1999. The copy is the first volume of a set and is available for regular circulation (circulation type code R). It was purchased from Follett Library Resources with funding from an Olin Foundation grant. The contents of the 852 tag should include:</p> <pre style="margin-left: 40px;">_xFSC@aR@b2@c19990504@fFollett Library Resources@i1@jVolume _xFUND:Olin Foundation</pre> |

Before you import bibliographic records, check the following:

- Does your library have a MARC Organization code? If so, make sure it is defined in System Setup (see page 35).
- Is your barcode symbology set up correctly? See “How to select and define barcode symbologies” on page 39.
- If your import records contain vendor information (852_xFSC@f subfield), or a funding source (852_xFUND subfield), make sure they are entered in the Vendor or Funding Source tables in System Setup | Setup | Acquisitions.
- How are you creating keywords? For information on setting up your keyword options, see “Create Keyword Entries as MARC Records are Saved” in the table on page 56. If you don’t create keyword entries during import,

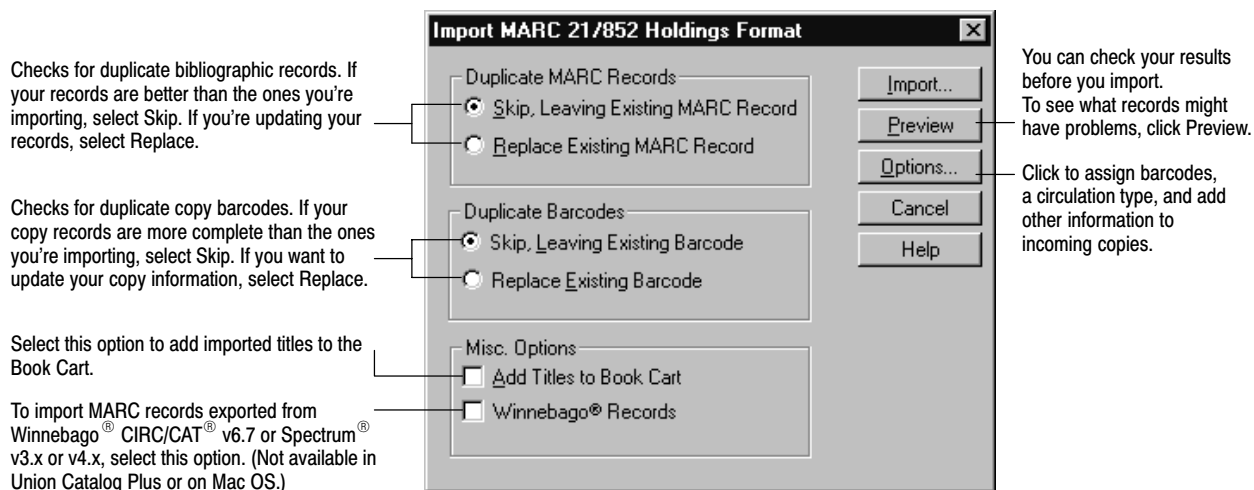
the import runs faster, but you then need to run the Update Keywords utility before you can perform keyword searches (see page 345).

Important: If you need to import records from a Winnebago® database, there are some additional steps you should take. See page 297 for details.

Importing MARC 21/852 Holdings data

This feature lets you import MARC 21/852 Holdings title/copy records from a vendor or another library. Use it also for importing WebPath bibliographic records (BIB856.001).

1. From the Cataloging menu bar, choose File | Import MARC 21/852 Holdings Format. The Import MARC 21/852 Holdings Format dialog appears:



- Select the manner in which the import process handles duplicate records for both MARC records and copies. Choose Skip to preserve your existing record; choose Replace to overwrite the existing one with the incoming record.

The import process determines whether an incoming MARC record is a duplicate by comparing control numbers, standard numbers, or, if those are missing, by comparing title, author, and publication information.

The process determines whether an incoming copy is a duplicate by comparing barcode numbers. All incoming copies must have a barcode, either existing in the import record, or assigned in the Options dialog (see Step 2).

- To create a list, sorted by call number, author, or title, of the titles imported, check Add Titles to Book Cart. Because this option adds to the Book Cart only the titles that were successfully imported, the resulting printout complements the exception report.

In the Book Cart, you can perform an autorecon on just the imported records. You can also transfer them to and from MARC Magician, if you have that program. For more information on the Book Cart, see page 346.

- **Important for Winnebago Imports:** When you select the Winnebago® Records option, you're alerted that some additional processing may be necessary. If your database already contains records, you will also be reminded to run a backup before proceeding (see page 607).

When importing Winnebago records, the Import button is disabled because you must first preview the results of your import. However, *before* you proceed, make certain that you review the information starting on page 297.

See also: If you're running Union Catalog Plus, see page 295 for instructions on assigning copies to a member.

2. To assign barcodes or add other information to your incoming copies, press the Options button. The Import Options dialog appears:

Note: This feature does not create copies; the incoming MARC records must have existing 852 tags.

In Assign Barcodes, you can use the incoming barcodes for the copies, assign new barcodes to those copies without them, or assign new barcodes to all incoming copies:

- “Always use incoming barcode” assigns the barcode in the incoming 852_p subfield to the copy. If the incoming copy has no barcode, Import creates no copy and makes an entry in the exception report.
- “Use incoming barcode number” assigns the barcode in the incoming 852_p subfield to the copy. If the incoming copy has no barcode, Import assigns one starting with the number in the If none available, start at text box. Import does not assign any barcode that already exists in your database.

Example: If you enter 1000 in the text box, Import assigns that barcode number to the first copy record without a barcode, 1001 to the next, and 1002 to the next. If 1003 is already in use by a copy in your database, Import skips 1003 and assigns 1004 next.

- “Always assign next available barcode” ignores any barcode in the incoming 852_p. Import assigns a new barcode to every incoming copy, starting with the number in the Starting at text box. Import does not assign any barcode that already exists in your database.

Important: In the text box, if you enter a number larger than 7 digits, it must be one that agrees with the symbology you defined in System Setup | Site | Barcodes. To start the numbering at the highest barcode in your database, press the Assign Barcode button. To fill gaps in your barcode sequence, enter the lowest number in your symbology.

For every barcode assigned, Import makes an entry in the exception report, listing the title, control number, LCCN, and barcode(s).

In “Assign default copy values,” you can assign a vendor, funding source, circulation type, categories, and/or a sub location to incoming copies. Import adds the values entered here *only* if the corresponding subfield in the import record is blank. That is, information in the import file takes precedence over any values entered in the Assign default copy values group box. If you choose Replace Existing Barcode (on the Import dialog), this combined information is entered in the corresponding subfields in the existing copy record *only* if those subfields are blank.

- To add a vendor to your copies, select one from the list. Import adds this information to the copy record if the incoming 852_xFSC@f subfield is blank.
- To add a funding source to your copies, select a funding source from the list. Import adds this information to the copy record if the incoming 852_xFUND subfield is blank.
- Select a circulation type. Import assigns it to any incoming copy without one in the incoming 852_xFSC@a. This selection overrides the Default Circulation Type that you selected in System Setup | Cataloging | Circ Types.
- To add categories to the incoming copies, enter the existing category codes, separated by commas, hyphens, or slashes. If you prefer to assign categories by name, click the Categories button to do so.

Cataloging allows a maximum of 8 categories per copy. Import adds any that are in the incoming copy record first (852_xFSC@b), and if space permits, adds the ones entered here. If it cannot add all the categories, Import lists, in the exception report, the ones omitted.

Note: If you import records with categories from another Follett system, be aware that categories are matched by number, not by name.

The category names that are defined in your System Setup are used. If an incoming copy has an undefined category code, a new one is created and named “*n* Added by Import” (“*n*” is the undefined category code). You can change this name, or delete the category altogether, in System Setup (see page 53).

In Cataloging, you can assign additional categories to the copies—with a PHD (see page 338), in the Copy Editor (page 286), or in the Individual Update dialog (page 330).

- To add a sub location, enter up to 20 characters in the last text box. Import adds this information to the copy record if the incoming 852_b subfield is blank.

After you choose your copy options, click OK to save them and to return to the Import MARC 21/852 Holdings Format dialog.

3. After selecting your options, insert the import file disk (if necessary), and click Import. Or, if you want to check the results before importing, click Preview. Preview reads the incoming records, compares them to the existing records, and generates an exception report, but does not actually import the records. A standard Open File dialog then appears. Locate and select your import file, and click Open. A progress dialog appears.

Warning: All changes made to your database are immediate. You cannot reverse the changes by canceling the import process. (The Preview process, however, does not alter your data.)

4. When the process is complete, a message appears asking if you want to import another file with the same options. If you choose No, the Import dialog and the Import Options dialog entries revert to the default settings. When you are finished, click Close. The application generates an exception report listing any errors that were encountered during the process (see “Interpreting the exception report,” page 308). If the Import process assigned barcodes or skipped any categories entered on the Import Options dialog, the report lists these also.

If you’re previewing an import, look over the exception report and decide whether your import settings need any adjustments before you do the actual import.

For Union Catalog Plus: Assigning copies on import

The import dialog is slightly different if you are importing to Union Catalog Plus. To assign the copies to a member, select the option which best suits your needs. After selecting your assignment method, continue with step 2 on page 292.

To assign the copies to the union catalog member whose MOC is in the MARC record's 852a tag, select this radio button.

Note: The MOC must be defined in Member setup.

To assign the copies to a union catalog member of your choice, select this radio button and click Select member.

Then from the Select Member dialog that appears, highlight the member and click Select. The member's full site name then appears here and in the title bar of the progress window.

Important: If you select the Assign to member option, the import process ignores any MARC Organization Code (MOC) that may be in the 852_a tag and assigns the copies to the member you specify.

On the Import Options dialog, the Assign Barcode buttons are not available. If you selected Assign to member based on 852, the Assign Barcodes group box, Circulation Type, and the Category Codes options are also not available.

Importing MARC 21/852 Holdings Format Data by Barcode

If you recently sent your bibliographic and copy records to Follett Software Data Services or some other vendor for a retrospective conversion and now want to import them back into your database, use the Import MARC 21/852 Holdings Format By Barcode option. This function does not add titles or copies to your database. This function replaces your bibliographic records with the ones contained in the import file.

Important: The Import MARC 21/852 Holdings Format by Barcode function should only be used to update your existing bibliographic records with enhanced data. Do not use this function to import new bibliographic records that you received with new materials.

1. From the Cataloging main window, choose File | Import MARC 21/852 Holdings Format by Barcode. The dialog appears, warning you that this option updates your database, and recommending that you back up your system before proceeding.
Checking Add Titles to Book Cart creates a list of the titles imported that you can recon, or sort by call number, author, or title, and print. For more information on Book Cart features, see page 346.
2. Insert the disk with the import file, and click Import. Or, if you want to check the results before importing, select Preview. A standard Open File dialog appears. Locate and select your import file, and click Open. A progress dialog appears.

Warning: All changes made to your database are immediate. You cannot reverse changes that have been made by canceling the process. (Please note that the Preview process does not alter your data.)

3. When the import is complete, a message appears asking if you want to import another file. When you are finished importing, click Close. The application generates an exception report if any errors were encountered during the import (see "Interpreting the exception report," page 308.)

Important: To use Import by Barcode in Union Catalog Plus, the records *must* have a MARC Organization Code (MOC) in tag 852_a.

Importing MARC 21/852 Holdings Format by Control Number

Use Import MARC 21/852 Holdings Format By Control Number if you have exported and updated your bibliographic records and now want to import them back into your database. Import by control number looks at the control number in the 001 tag. Cataloging creates this unique identifier for each new record.

This function does not add titles or copies to your database; it replaces your MARC records with the ones in the import file. Use this function, instead of Import by Barcode, if the incoming, updated MARC records do not have copies attached to all records. If the import file does contain copy records, it updates any copy fields that have changed, with one exception. It does not replace categories. It adds any categories in the incoming copy record to the existing ones.

1. From the Cataloging main window, choose File | Import MARC 21/852 Holdings Format by Control Number. A dialog appears, warning you that this option updates your database, and recommending that you back up your system before proceeding.
Checking Add Titles to Book Cart creates a list of the titles imported that you can recon, or sort by call number, author, or title, and print. For more information on Book Cart features, see page 346.
2. Insert the disk with the import file, and click Import. Or, if you want to check the results before importing, click Preview. A standard Open File dialog appears. Locate and select your import file, and click Open. This begins the process. A progress dialog appears.

Warning: All changes made to your database are immediate. You cannot reverse changes that have been made by canceling the process. (The Preview process does not alter your data.)

3. When the import is complete, a message appears asking if you want to import another file. When you are finished importing, click Close. The application generates an exception report if any errors were encountered during the import (see “Interpreting the exception report,” page 308).

For Winnebago records: Reconstructing your barcodes and more

Not all MARC records are created equal. To import title and copy records from Winnebago’s CIRC/CAT® v6.7 or Spectrum® v3.x or v4.x, some special handling may be necessary. Before you *export* your material records from Winnebago, you need to look at your collection and the information in the Winnebago database. Use the information in the next few sections to help guide you through the examination, export, and import processes.

Examining your barcodes

Standard 14-character barcodes contain a type identifier, location code, item number, and possibly a check digit. Typically, only part of the barcode (the item number) is stored in the Winnebago database. When importing your old records into your new Follett Software database, the barcodes may need to be reconstructed. Before that can happen, however, you need to determine how much of the information on your barcode labels is actually in the database.

Gather a sample of items from your collection, preferably items that were added at different times (e.g., last week, six months ago, two years ago, etc.). Use your Winnebago software to look up each item and compare the material/barcode number that appears in the Winnebago application with the number on the barcode label.

Note: The Follett applications support barcodes with 14 characters or less. If your barcodes are longer, please contact Follett Software’s Customer Service.

Do the numbers on the barcode labels *exactly* match the material/barcode numbers in the application? If they do, see “Scenario 1” below for more information. If they don’t, see “Scenario 2” on page 298.

Scenario 1: Are the numbers on the barcode labels the same as the numbers in the application? Make a note of the length of each material number.

In this scenario, material/barcode numbers with *seven* digits or less are “Follett Classic” barcodes. If you have material/barcode numbers between *eight* and *fourteen* digits long, you must set up a temporary Generic Code 39 or Generic Codabar barcode symbology for your library materials (see page 39). Do not select a type identifier or location code. To ensure that the incoming material is imported “as is,” the item number must start in the first position, and its length must equal the total length of the barcode. After importing, if necessary, you can change the setup of your barcode symbology to accurately reflect their contents (e.g., specifying type identifiers).

Important: Not counting any Follett Classic barcodes (seven digits or less), in this scenario the rest of the material/barcode numbers must be the same length (e.g., eight digits long). If you have numbers of varying lengths, you must choose the *one* length (i.e., symbology) you want to use. Before exporting the rest of the items, you'll need to give them new barcodes that conform to either Follett Classic guidelines or to your selected barcode symbology.

Scenario 2: Are some of the numbers on the barcode labels not displayed in the application? If it isn't displayed in the application, then it cannot be exported. Make a note of what is displayed in the application and what isn't. You should start to see a pattern between the barcode label numbers and the material numbers in the application: an extra digit or character added before or after the material number, a number or sequence of numbers that appears on every label, etc.

In this scenario, when you import your records, you'll need to provide the Barcode Wizard with the missing information (see page 301). Typically, the item number is the only part of the barcode that is stored in the Winnebago database. For help dissecting your barcodes, see "What does a barcode contain?" on page 647.

Important: If you notice differences in barcode length or content, your collection may be using multiple symbologies. If that is the case, you'll need to decide which symbology you want to use. Remember that the Follett applications let you use any "Follett Classic" symbology (seven digits or less) plus *one* other symbology (see page 39). Before exporting the rest of the items, you'll need to give them new barcodes that conform to either Follett Classic guidelines or to your selected barcode symbology.

Do *both* scenarios apply to your collection? Based on the item's material/barcode number (in the Winnebago software), can you determine which items fall into which scenario? If so, it may be possible to reconstruct your barcodes accurately; re-read both of the scenarios carefully. If you *can't* tell which items belong to which scenario, contact Follett Software's Customer Service department.

Exporting your records

When you export your material records from a Winnebago database, there are a few points you need to remember.

- Select the USMARC/852 Holdings Format export option.
- If you're exporting from a Spectrum v3.x or v4.x database, you have the option to include your 961 tags. Among other information, the 961 tag contains the volume numbers you assigned. If you decide to include the 961 tags, see the following section for details on how the information is handled.
- To help ensure that your barcodes are reconstructed accurately, it is critical that you export (and import) only *one* symbology at a time. Depending on the contents of your collection and database, multiple exports may be necessary.

For example, if your collection contains both Follett Classic barcodes and Code 39 Mod 10 barcodes, export the Follett Classic barcodes to one file and the Code 39 Mod 10 barcodes to a second file. Make certain to note what symbology each file contains.

Note: If your collection contains items that you received from another library, they may still be using their original barcodes. If they are and have 14-digit barcodes, it's likely that their barcodes contain different location codes. If they do, you must export these items separately.

To limit your export to items that use a certain symbology, you'll need to define a range of material numbers. How do you know where one symbology ends and another begins?

- If the numbers on the barcode labels exactly match the material/barcode numbers in the application, the *length* of the material number is the key (see "Scenario 1" on page 297).
- If some of the numbers on the barcode labels are not displayed in the application (see "Scenario 2" on page 298), the *actual* material number is the key. An item's material number should be the basis for its barcode.

When you ordered your barcodes, in addition to specifying a symbology, you probably also provided your vendor with a range of item/material numbers for the labels. These numbers should match the material numbers of the items that use that symbology; simply export the items in that material number range.

Note: If you do not have a record of the barcode item numbers you purchased, please check with your barcode vendor.

When you look up your barcode information, you must also take note of the *type identifier* specified for each order. Even if the symbology is the same, the type identifier can be different from one order to the next. Although your symbology can use up to six defined type identifiers (see page 39), you need to export each type identifier separately.

If you *can't* limit your export to a single symbology or type identifier, contact Follett Software's Customer Service department.

See also: Before importing your records, make certain that you have also checked the pre-import criteria listed at the bottom of page 290.

How your records will change

In addition to reconstructing your barcodes, some special handling may be needed to ensure that your records are compatible with the Follett Software applications. The following table indicates (with an X) the information in the Winnebago applications that could be affected and what the change involves.

| Field name | v6.7 | v3.x | v4.x | Changes |
|-------------------|------|------|------|--|
| Call number | | X | X | Call numbers with more than 30 characters are truncated and a message indicating the affected record is written to the exception report. |
| Fund | | X | X | Funding source information in tag 852_x is moved to tag 852_xFUND: and truncated to 24 characters. A message indicating the truncated record is written to the exception report. |
| Location | X | X | X | Tag 852_a is reserved for your library's MARC Organization Code (MOC). If the information in this subfield doesn't match the MOC defined in System Setup (see page 35), it's moved to 852_b (Sub Location) and truncated at 20 characters. A message indicating the truncated record is written to the exception report. |
| Material category | | | X | <p>The Leader (000 tag) is updated to match the material category indicated in tag 007 of the incoming record: book, videorecording, or sound recording.</p> <p>Note: The Follett Software uses the term <i>material type</i> when referring to an item's physical category (e.g., book, video, sound recording). This information provides a visual clue when searching in Cataloging and the OPACs and a method for limiting searches. This information is included in many reports.</p> <p>Records cataloged with the Spectrum v4.x <i>sound</i> template will be assigned a material type of Sound Recording (Nonmusical) on import. To change the material type to Sound Recording (Musical), after import, use the MARC Editor to edit the record type in the Leader (page 268) and make the necessary changes to the 008 tag (page 272).</p> |
| Material type | X | X | X | <p>The contents of tag 961_t are copied to a 590 tag. Please note that your export/import file contains the material type number <i>not</i> the description.*</p> <p>Note: Winnebago's material types are similar to Follett Software's <i>circulation</i> types, in that our circulation types are used (with patron types) to set up circulation policies. For more information about circulation types, see page 45.</p> |
| Price | X | | | Prices with more than 10 digits are set to zero. A message indicating the affected record and the original price is written to the exception report. |
| Volume number | | X | X | Volume numbers are moved from tag 961_v to tag 852_xFSC @i<Enumeration>@j<Description> and @e<Volume #>. |
| User defined 1 | X | X | X | The contents of tag 961_u are copied to a 590 tag. Please note that your export/import file contains the contents of the field, <i>not</i> the field name.* |

| Field name | v6.7 | v3.x | v4.x | Changes |
|----------------|------|------|------|---|
| User defined 2 | | X | X | The contents of tag 961_u are copied to a 590 tag. Please note that your export/import file contains the contents of the field, <i>not</i> the field name.* |

* This information was displayed with your copy information in the Winnebago catalog applications. As a rule, the Follett Software OPACs do not display the local information stored in 9xx tags. However, to ensure that this information would remain visible to your patrons, a 590 tag (Local Note) is created for *each* copy (852 tag and its 961 tag) that is added to the title record during import. The contents of that copy's tag 961_t and _u are then copied to 590_a.

For example, tag 961_t<material type number>_u<user defined 1>_u<user defined 2> will be converted to tag 590_a[w] <material type number>---<user defined 1>---<user defined 2>. The "[w]" lets you easily identify which 590 tags in your records were created from 961 tags.

Note: The import *also* adds the 961 tag to the title record for each copy added. After import you can globally delete these tags (see page 334). If a title record reaches its maximum size during import (see the record size limit table on page 266), copies will still be added to the record, but neither the 961 tag nor 590 tag will be added. A message indicating the affected record and the contents of the skipped 590 tag is written to the exception report.

See also: For more information about how Follett Software formats the information in the 852 tag, see page 289.

The Barcode Wizard

To accurately reconstruct your barcodes, you must provide the Barcode Wizard with some specific information about your barcodes. Before you start an import, you'll need the information outlined below.

- The *barcode format* uses the following key to show how long your barcodes are and what they contain.

I = Type Indicator/Identifier L = Location Code
 B = Item/Material Number F = Fill Character or Check Digit

For example, a typical 14-digit barcode—3123400010001E—contains a type identifier (3), location code (1234), item/material number (00010001), and a check digit (E). The format for this barcode would be ILLLLBBBBBBBBBF.

Important: You should use a *B* to indicate each digit that is stored in your Winnebago database as a material/barcode number. What should you do if, as in the example above, the item/material number has leading zeros, which may or may not be in your database? You can either use *B* (as above), which will automatically pad the number with leading zeros, or *F* set to a value of zero (see "fill character" below).

If you're importing from Winnebago's CIRC/CAT v6.7 or Spectrum v4.x, you can look up the barcode format.

- In Spectrum v4.x, from any program window, select Winnebago | Setup | Location. On the Location Setup dialog, open the Numbers tab and click the Configurations button.

- In CIRC/CAT v6.7, start from the system’s main menu and select Winnebago CIRC/CAT | Setup/Utilities | System Utilities | Setup Barcodes.

If you’re importing from a Winnebago Spectrum v3.x database, you’ll need to examine your barcodes to determine what they contain. For help, see “What does a barcode contain?” on page 647.

- Unless it’s “Follett Classic,” you’ll need the name of the *barcode symbology* you’re importing. For descriptions of the different symbologies, see page 649.
- If the barcode format includes a *type indicator*, you must know the alpha or numeric character that is used. Please note that even though a symbology can have up to six type identifiers, you must import only one identifier at a time.
- You’ll need the four-digit *location code* that identifies your library if the barcode format includes one. If you’re importing from Winnebago Spectrum v3.x or v4.x, the location code is stored with your setup information.
 - In Spectrum v3.x, from any window, select Winnebago | Setup | System. The location code appears on the Partition tab.
 - In Spectrum v4.x from any program window, select Winnebago | Setup | Location. The location code appears on the General tab.

If you’re importing from Winnebago’s CIRC/CAT v6.7, you’ll need to examine your barcodes to determine the location code. For help, see “What does a barcode contain?” on page 647.

- If your barcode format includes any *fill characters*—not including the check digit, the last character in the barcode—you must know the alpha or numeric character that is used. Typically, the fill character is a leading zero.

Important: The barcode information you enter in the Barcode Wizard must match the symbology you defined in System Setup (see page 39).

With this information, the Barcode Wizard can rebuild almost any barcode. However, to make sure that the reconstructed barcodes are accurate, it is crucial that you provide the right information. One extra character in the barcode format can make a difference.

For example, assume that an incoming copy (holding) has the material/barcode number **25674**. The following table shows how the Barcode Wizard will reconstruct the barcode based on the information you provide:

| Barcode format | Type indicator | Location code | Fill character | Reconstructed barcode |
|---------------------------------|----------------|---------------|----------------|---|
| 1. BBBBbbb (Follett Classic) | | | | T 0025674 (Appears as T 25674. Follett Classic barcodes do not display leading zeros.) |
| 2. BBBBbbb | | | | 00025674 |
| 3. FFFBBBBbbb | | | 1 | 11100025674 |

| Barcode format | Type indicator | Location code | Fill character | Reconstructed barcode |
|----------------|----------------|---------------|----------------|-----------------------|
| 4. BBBBFFFIF | 3 | | 0 | 002567403R |
| 5. ILLLFBBBBBF | 3 | 1234 | 1 | 3123411025674\$ |
| 6. ILLLBBBBBBF | 3 | 1234 | | 3123400025674. |
| 7. ILLLBBBBBB | 3 | 1234 | | 31234000025674 |
| 8. ILLLFBBBBB | 3 | 1234 | 0 | 31234000025674 |
| 9. ILLLFBBBBB | 3 | 1234 | 1 | 31234110025674 |

Note: The check digits in examples 4–6 were reconstructed using the Code 39 Mod 43 algorithm.

Importing Winnebago records

After gathering the necessary information (as described in the previous section), select your import options as described on page 291. When importing Winnebago records, we recommend that you *skip* duplicate records and copies.

Note: If you have a subscription to Alliance Plus, you may want to select the Add Titles to Book Cart option so that you can recon them against an Alliance Plus data source after import.

The Import Options dialog is not available for a Winnebago® import.

1. After confirming the selection of the Winnebago Records option, click Preview. A standard Open File dialog appears. Locate and select your import file, and then click Open. The Barcode Wizard dialog appears.

The first piece of information you need to provide is your barcode format. In addition to showing your barcodes' length and setup, the barcode format tells the Barcode Wizard what is *missing* from the material/barcode numbers in the import file.

Select or enter the barcode format for the records you're importing.

Important: The Bs (item number) in your barcode format must not be separated by any other letter.

Barcode Wizard

What is your Barcode Format?

The barcode format shows how long your barcodes are and what they contain.

I = Type Indicator L = Location Code
F = Fill Character B = Item Number

Example : ILLLFBBBBBF (Typical 14 digit barcode with check digit)

The Type Indicator identifies the barcode as a material barcode or patron barcode.
The Location Code identifies the library to which the item belongs.
The Item Number is the core of the barcode number used to reference the item.
The Fill Character relates to any other character in the barcode.

Barcode Format :

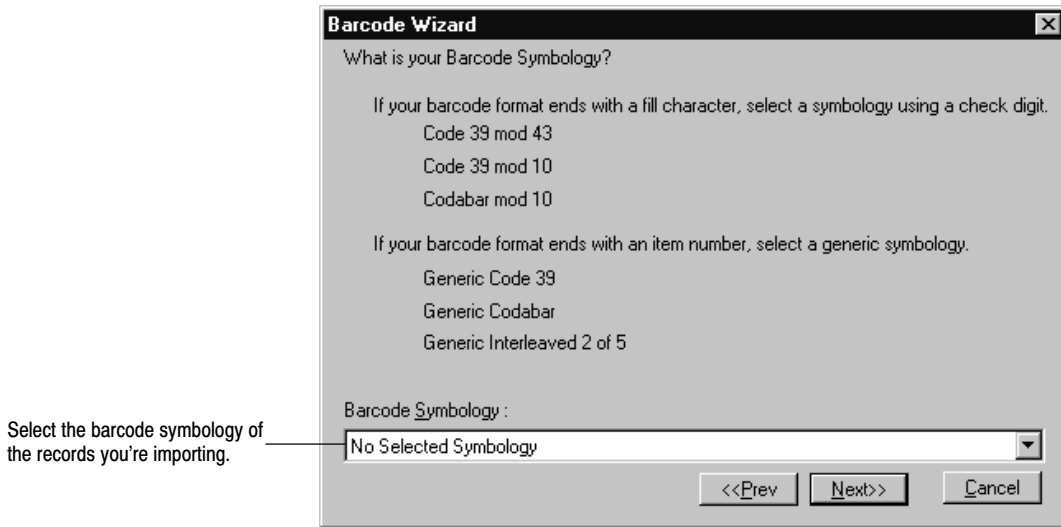
Next>> Cancel

After entering your barcode format, click Next to proceed.

Important: All the barcode information you enter in the Barcode Wizard must match the symbology you defined in System Setup (see page 39).

- 2. If your barcode format indicates that the barcodes in the import file are intact and are a Follett Classic symbology (e.g., BBBBbbb), the Barcode Wizard skips to step 6 (page 306).

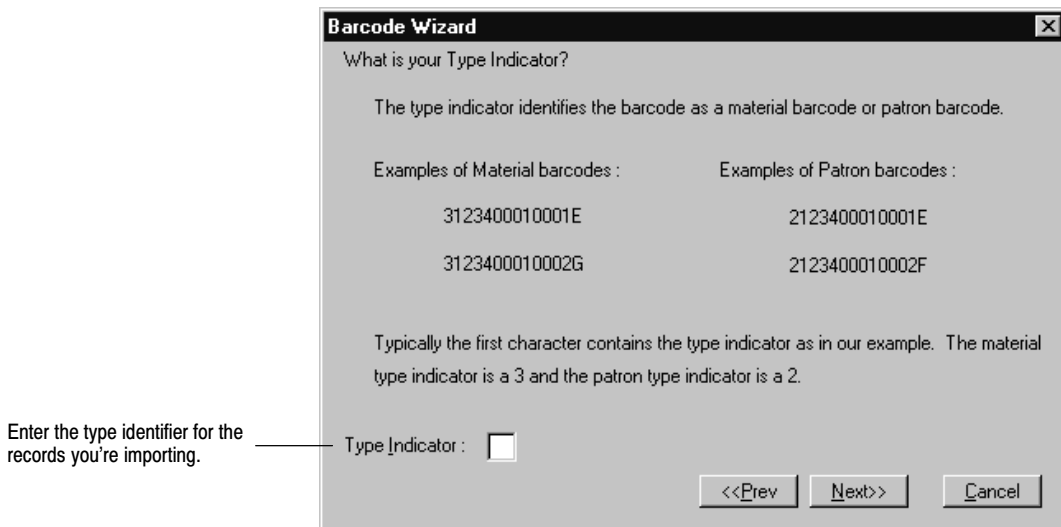
If your barcodes need to be reconstructed or are longer than seven characters, you'll need to supply the name of your barcode symbology.



After selecting your barcode symbology, click Next to proceed.

- 3. If your barcode format doesn't include a type identifier (indicated by an I), the Barcode Wizard skips to step 4.

If your format does include a type identifier, enter the alpha or numeric character that is used by this set of barcodes.

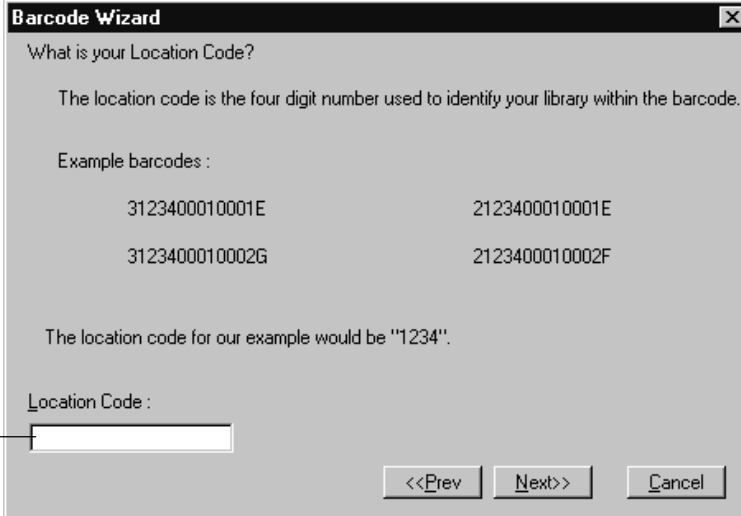


Note: Remember that even though a symbology can have up to six type identifiers, you must import only one identifier at a time.

After entering the type identifier, click Next to proceed.

4. If your barcode format doesn't include a location code (indicated by four *Ls*), the Barcode Wizard skips to step 5.

If your format does include a location code, enter the four-digit code that identifies your library.



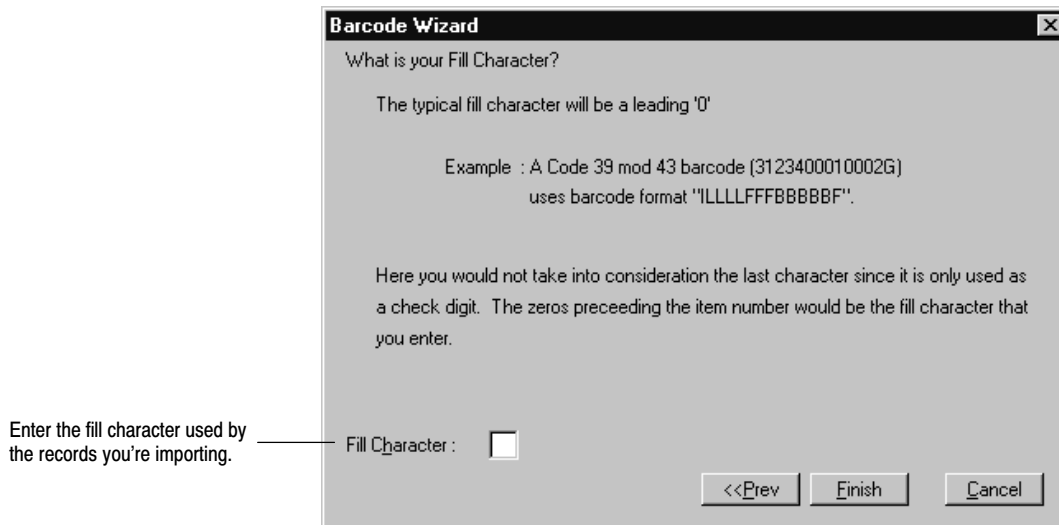
The screenshot shows a dialog box titled "Barcode Wizard" with a close button in the top right corner. The main text asks "What is your Location Code?" and explains that the location code is a four-digit number used to identify the library within the barcode. It provides two example barcodes: "3123400010001E" and "2123400010001E" on the first line, and "3123400010002G" and "2123400010002F" on the second line. Below the examples, it states "The location code for our example would be '1234'". At the bottom, there is a label "Location Code:" followed by a text input field. An arrow points from the text "Enter the four-digit location code for your library." to this input field. To the right of the input field are three buttons: "<<Prev", "Next>>", and "Cancel".

After entering the location code, click Next to proceed.

5. If your barcode format doesn't include any fill characters (indicated by an *F*), the Barcode Wizard skips to step 6.

Note: Remember to disregard the last character in your barcode format if it's represented by an *F*. It's a check digit, not a fill character.

If your format does include fill character(s), enter the alpha or numeric character that is used. Typically, the fill character is a leading zero.



After entering the fill character, click Finish.

6. Once you've entered all the information that the Barcode Wizard needs to rebuild your barcodes, a message appears informing you that the preview process is ready to begin. Click OK to continue. A progress dialog appears.

When the preview process is complete, close the progress dialog. If any errors were encountered, the application generates an exception report and prompts you to review it. Examine the exception report carefully. If you need to make modifications to the import file or your barcode format *before* you can proceed with the import, we recommend that you print the exception report and save it when prompted.

Note: There are three types of exception messages: notes, warnings, and errors. While messages marked "Note" and "Warning" are primarily informational (e.g., a field was truncated, a duplicate record skipped), "Error" conditions *may* indicate a more serious problem.

For example, an "Error" is created if an incoming copy's material number is longer than the barcode format's item number. Since the barcode can't be rebuilt, the copy is skipped. One or two "Error" statements of this sort could mean that you have a few nonconforming items that need to be rebarcoded. Numerous "Error" statements could mean that your barcode format isn't defined correctly or that your import file contains more than one barcode symbology.

A message appears, asking if you want to proceed with the import. To import your records, click Yes. The import progress dialog appears.

Warning: Once you start the actual import, you cannot reverse any changes that the import process makes to your database. Canceling the process only prevents additional changes from being made.

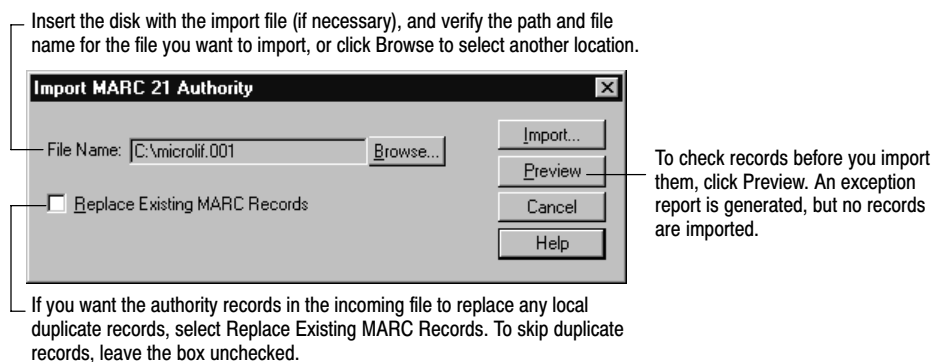
When the import process is complete, close the progress dialog. If any errors were encountered, the application generates an exception report. The majority of these errors will be identical to those encountered during the preview. However, since some errors may require you to make manual changes to your records, we recommend that you print the exception report and save it when prompted.

Importing authority records

If you have a MARC 21 file containing authority records that you want to use for cross-references, use the Import MARC 21 Authority function. Cataloging lets you import authority records with the following headings: 100 - personal name, 110 - corporate, 111 - meeting, 130 - uniform title, 150 - topical, 151 - geographical, and 155 - genre/form.

Note: If you want to build cross-references as authority records are imported, first select the Create Cross-References as Authority MARC Records are Saved option in System Setup (see page 56). Make sure to close and reopen Cataloging for the change to take effect.

1. From the Cataloging main window, choose File | Import MARC 21 Authority. The Import MARC 21 Authority dialog appears:



Duplicate records are found by comparing control numbers, LCCNs, then 1xx headings. If any of these match, the incoming record is a duplicate.

Note: If you subscribe to WebPath Express, we recommend that you leave the Replace Existing MARC Records box *unchecked* whenever you import WebPath Express authority records. If a duplicate authority record is found, the import simply adds the WebPath Express tags from the incoming record to the existing authority record.

Once they've been added to your authority records, you never need to worry about accidentally replacing your WebPath Express tags in future imports. The WebPath Express tags *always* survive the import process.

2. After selecting your import options, insert the disk with the import file, and click Import (or Preview). A standard Open File dialog appears. Locate and select your import file, and click Open. A progress dialog appears.

Warning: All changes made to your database are immediate. You cannot reverse changes that have been made by canceling the process. (Please note that the Preview process does not alter your data.)

- When the import is complete, a message appears asking if you want to import another file. When you are finished importing, click Close. The application generates an exception report if any errors were encountered during the import (see “Interpreting the exception report,” page 308).

Note: Whenever the import adds a new WebPath Express authority tag, you’re given the opportunity to delete any WebPath Express *bibliographic* tags that may be in your collection. To simplify future maintenance, we recommend that you delete them. If you choose not to delete your WebPath Express bibliographic tags at this time, you can always remove them with the Global Delete Tag feature (see page 334 for instructions).

Interpreting the exception report

The import process validates incoming records against MARC standards (which require certain fields and have some size stipulations). If any problems are encountered during import, they appear in an exception report. This report resides in an Exception Reports folder within your Follett folder.

| Exception message | What it means |
|---|--|
| Barcode <number> contained a MARC Organization Code of <code> which did not match the one specified in Site Identification. | The union catalog import encountered a MARC Organization Code that was not found in any member configuration in System Setup Member Site Identification. The record was added if new, but the copy was skipped. |
| Barcode on copy <barcode number> does not match symbology defined in System Setup. | The import encountered a copy with a barcode that was inconsistent with the symbology chosen in System Setup under Site setup. The copy was skipped. |
| Barcode <barcode number> was not found. | During an import of MARC 21/852 holdings data by barcode, the import could not locate an incoming barcode in the database. The copy was skipped. |
| Call number is too long... Truncated. | The import encountered a copy with a call number of more than 30 characters. The import shortened the call number to the proper length. |
| Category for copy entry <number of copy> is not between 2 and 2000. | The import encountered a copy with a category code that falls outside the 2–2000 range. The category was removed from the copy record before the copy was added to your database. None of the valid copy fields were affected. |
| Conversion error <error number>. | The import could not properly convert a MARC record. The entire record was skipped. |
| Copies in record exceed 4000. | The import encountered a MARC record with more than 4000 copies attached to it. The first 4000 copies were added to your database, but the additional copies were skipped. |

| Exception message | What it means |
|---|---|
| Copy entry <number of copy> contains no barcode. | The import encountered a copy without a barcode and the Assign Barcode option was not used. The copy was skipped. |
| Copy entry <number of copy> has more than eight categories. | The import encountered a copy with more than eight categories. The first eight categories were saved and the rest discarded. None of the valid copy fields were affected. |
| Copy not saved <error code>. | The copy record could not be saved due to a database error. The copy was skipped. |
| Copy with Barcode <barcode number> already exists. | The import encountered a duplicate barcode record. This message only appears if you selected to skip duplicate barcodes during import. The copy was skipped. |
| Copy with Barcode <barcode number> already exists for another title. | The import encountered a copy barcode that was already assigned to a copy of a different MARC record. This message appears even if you selected to replace duplicate barcodes. The copy was skipped. |
| Funding is too long... Truncated. | The import encountered a copy with a funding source of more than 24 characters. The import shortened the funding source to the proper length. |
| Invalid 008 tag adjusted to a proper length of 40 bytes. | The import encountered a record with an 008 tag longer than 40 characters. The import shortened the 008 tag to the proper length and added the record to your database. |
| MARC directory too large to process. | The import encountered a MARC record that exceeded the size limitation. The entire record was skipped. |
| MARC header not updated -- <error code>. | The attempt to replace the MARC record failed due to a database error. The entire record was skipped. |
| MARC record contains an 003 without an 001 tag. | The import encountered a MARC record with an 003 tag but no 001 tag. Since the 003 tag identifies the control number in the 001 tag, the entire record was skipped. |
| MARC record contains no 008 tag. | The import encountered a MARC record without an 008 tag. Since a MARC record must have an 008 tag to be valid, the entire record was skipped. |
| MARC record contains no title tags. | The import encountered a bibliographic record without any of the main title tags (130, 240, 245, 246, or 247). Since a MARC record must have a main title tag to be valid, the entire record was skipped. |
| MARC record exceeded 10240. | The import encountered a MARC record longer than 10,240 characters (the maximum length). The length of a record includes 4 characters per tag, 2 characters per subfield, and the actual data in each subfield, including spaces and punctuation. 852 tags are not included in the total length. The entire record was skipped. |

| Exception message | What it means |
|--|--|
| The MARC record does not contain a 245 tag, Title Statement. 245 tag created from existing <main title tag>. | The import encountered a MARC record that did not contain a 245 tag. Since the Follett Software applications require each bibliographic record to contain a 245 tag (also recommended by the Library of Congress), one was added to the record using the contents of another main title tag (130, 240, 246, or 247) in the record. Since this is an automated process, you should verify that the new 245 tag is complete and correct. |
| MARC record is invalid. | The import encountered an unprintable character serving as an indicator, an invalid (non-alphanumeric ASCII character) or incomplete subfield marker, or a subfield without data. The entire record was skipped. |
| Not a valid MARC record. | The import encountered a MARC record with a MARC directory that was incorrectly structured or was too short to be valid. The entire record was skipped. |
| Price "<incoming price>" is too long. Copy price will be set to zero. | The import encountered a copy with a price that contained more than 8 digits before a decimal point, more than 2 digits after a decimal, or more than 10 digits total. If the copy was added to your database, the price was set to zero. |
| Price "<incoming price>" has been modified. | The import encountered a copy with a price field that had more than one price (e.g., "\$34.95 (\$51.95 Canada)"). If the copy was added to your database, only the first price was included. |
| Record exceeded 256 tag maximum. | The import encountered a MARC record with more than 256 tags. The entire record was skipped. |
| Record less than 40 characters. | The import encountered a MARC record with less than 40 characters. Since the record isn't large enough to contain an 008 tag, the entire record was skipped. |
| This file does not appear to be in MARC 21/852 Holdings Format. | The import file did not contain MARC 21 records. |
| This file does not appear to contain updates to your existing titles and copies. | The first 10 records all produced errors. Import by Barcode and Import by Control Number are used only to re-import existing records that have been updated. |
| Title already exists - found via <method used to determine duplicate record>. | The import encountered a duplicate MARC record. This message only appears if you selected to skip duplicate MARC records during import. The bibliographic record was skipped, but the attached copies were still evaluated. |
| Title not saved. | The MARC record could not be saved due to a database error. The entire record was skipped. |
| Unable to acquire a lock on the MARC header. | The attempt to replace the MARC record failed because the record was being updated by another user. The entire record was skipped. |

Chapter 26 Exporting MARC records

Eventually, you'll need to make copies of some or all of the MARC records in your database. Perhaps you want to share records with other libraries or schools, or you have to divide your collection because of a change in the school district. Maybe you need to send your data to Follett Software or another vendor for a retrospective conversion. The export options in Cataloging allow you to do this. This chapter includes instructions for exporting bibliographic and authority records, splitting a collection, and interpreting an exception report.

Getting ready to export

Before you start exporting, make sure you have enough formatted floppy disks to hold your records. Record sizes vary greatly; but as a very general estimate, a 3.5" floppy disk holds 1000 full or 5000 brief MARC records. If you need to format disks, see your operating system's manual for instructions. Also be sure you have specified your library's MARC Organization Code, as described in "Identifying your library" on page 35.

Note: In 1999, the term *MARC 21* replaced *USMARC*. This change is a result of the harmonization of the U.S. and Canadian formats. All import and export dialogs now use this term.

Exporting bibliographic records

To export title and copy records, from the Cataloging main window, choose File | Export MARC 21/852 Holdings Format:

From the submenu, choose the export method you want to use.

To export all the titles in your collection, select No Range. To export a specific range of titles, select one of the other export options.

Refers to the copy call number

Lets you select individual records

Refers to the copy acquisition date

Exports records that were added, updated, or that received a new copy within the specified date range

To export authority records, see page 318.

1. After choosing from the submenu, the Export MARC 21/852 Holdings Format dialog appears. If you selected to limit the export by a range or to export individual titles by LCCN, ISBN, or ISSN, the appropriate range group box also appears on the dialog. If you selected No Range, a smaller version of the Export dialog appears. Make your selections for the export.

If you're exporting without any range, the dialog looks like this:

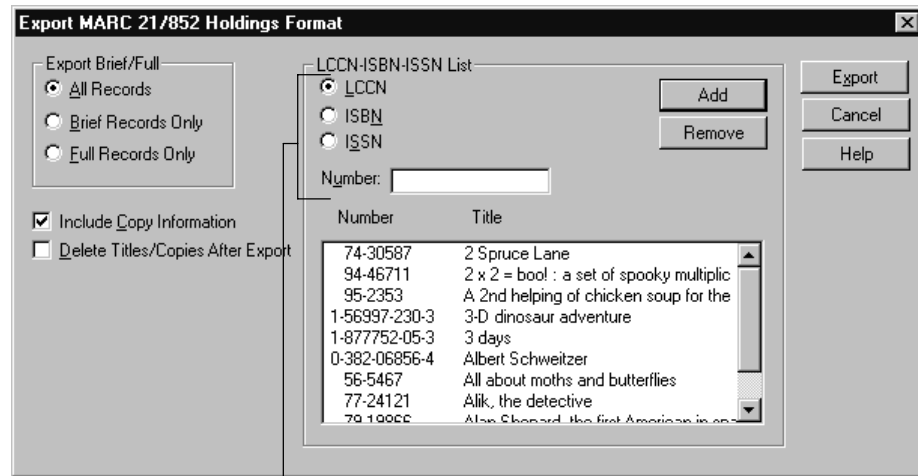
You can choose to export all records, brief only, or full only. Brief records do not contain tags between 305 and 899 (unless you changed the definition in System Setup; see page 54).

You can export records with or without their copy information.

Important: Use this option with **caution**. If you check this box, exported titles and copies are deleted from your database at the end of the process.

Click here to begin the export.

If you are exporting by a list of LCCN, ISBN, or ISSN numbers, the dialog looks like this:

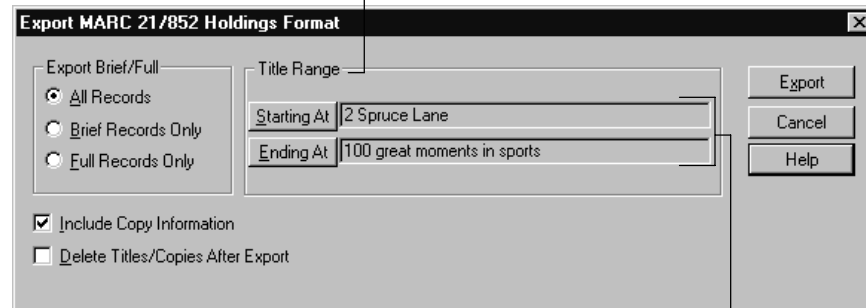


Select one of these radio buttons for your standard number. You can use all three types in one list. Type or scan the number in the text box, and click Add.

Note: With a properly configured scanner, you can scan ISBN barcodes. Select the ISBN radio button, position your cursor in the Number text box, and then scan the barcode. A successful scan automatically adds the record to your list. For more information, see Appendix H, "Configuring scanners."

If you are exporting by title, author, call number, subject, acquisition date, title date added/updated, or category, the appropriate dialog appears (see the following graphic and table for details). If the selected items are disqualified because of your brief/full selection, they are NOT exported.

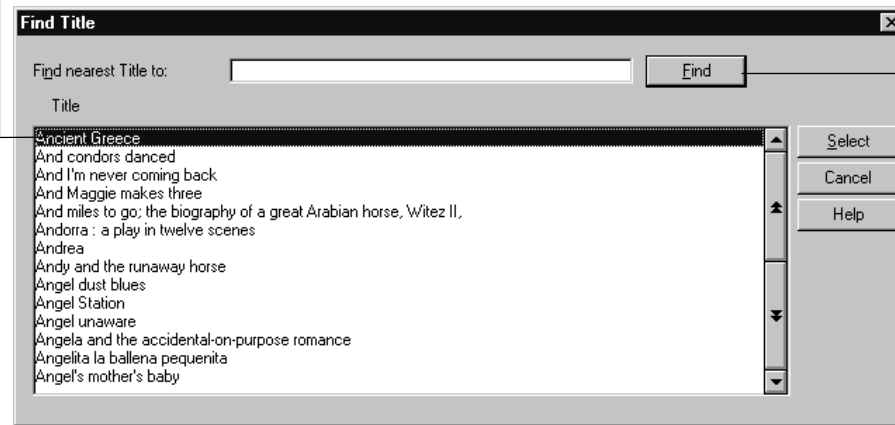
This group box changes according to your selection.



Select a range of records to export.

To search for records to define your range, click Starting At or Ending At. A dialog, specific to your search, appears:

If you clicked the Starting At button first, Cataloging highlights the first item in the library database.
If you clicked the Ending At button first, it highlights the last item in the database.



Type your search term in the text box, and then click Find.

The closest match to the search term is highlighted in the selection list. Highlight the desired record, and then click Select.

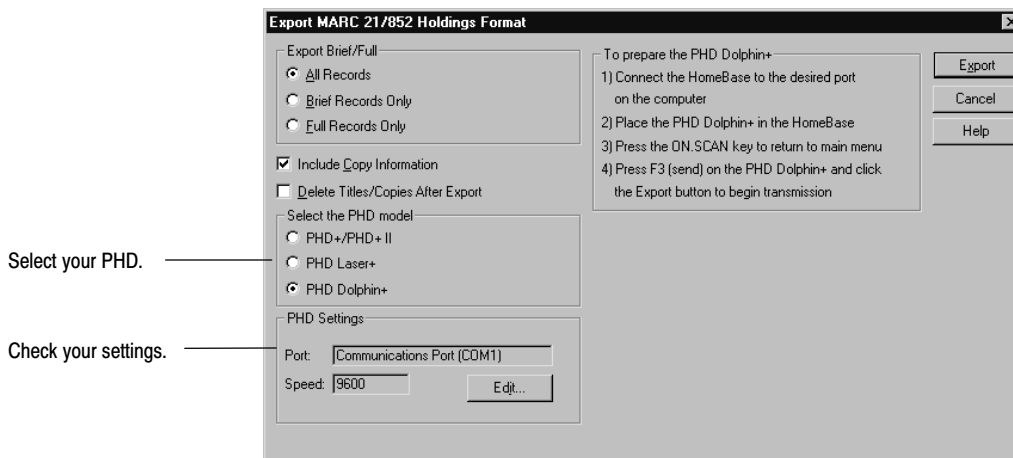
Note: To jump to the beginning of the selection list, click an item on the list, and then press **HOME**.
To skip to the bottom of the selection list, click an item on the list, and then press **END**.

If you do not select a starting and ending point, Cataloging displays a message asking if you want to include all the records in your collection with this type of heading.

| Selected range | Things to remember |
|-----------------------|---|
| No range | If you're not exporting by range, you can still limit the export to full or brief records. |
| Title | Click on the Starting At and Ending At buttons to find the starting and ending entries for the range. |
| Author | Click on the Starting At and Ending At buttons to find the starting and ending entries for the range. |
| Call number | Checks the copy record for the call number. Click on the Starting At and Ending At buttons to find the starting and ending entries for the range. Note that the titles exported may have copies with call numbers that fall outside the range; however, only copies with call numbers within the range are exported. |
| LCCN-ISBN-ISSN | You can add up to 100 numbers to the list for exporting. Choose the correct radio button to indicate the type of number you are entering, type the number, and then click Add. To remove a number from the list, highlight it and click Remove. Important: You can enter ISBNs and ISSN's with or without hyphens. If you enter them without hyphens, the application adds them automatically. When entering LCCNs, you must either include the hyphen (e.g., 72-75015) or replace the hyphen with a zero (e.g., 72075015). |
| Subject | Click on the Starting At and Ending At buttons to find the starting and ending entries for the range. |

| Selected range | Things to remember |
|---------------------------------|--|
| Acquisition date | Checks the copy record for this date. Specify a starting and ending date between 1/1/1980 and 12/31/2037. Note that the titles exported may have copies with other acquisition dates that fall outside the range. Only copies with acquisition dates within the range are included in the export. |
| Title date added/updated | Checks the title record 005 tag and the copy record for this date. Specify a starting and ending date between 1/1/1900 and 12/31/2037. |
| Barcode | Click on the Starting At and Ending At buttons to find the starting and ending entries for the range. |
| Category | Click on the Starting At and Ending At buttons to find the starting and ending entries for the range. Cataloging exports by the category description, not the code number. Note that the titles exported may also have copies that do <i>not</i> have a category in the specified range. Only copies with categories within the range are included in the export. Copies with the Temporary category are not exported. |

If you are exporting by PHD, the standard PHD dialog appears. Select your PHD model and connect your PHD to your computer. For instructions on collecting copy barcodes, see page 663 for a Telxon PHD, or page 677 for the PHD Dolphin+.



- Decide if you want to include the copy information with the exported title information, and if you want the title and copy records deleted after export.
 - Include Copy Information:** There may be rare occasions when you do NOT include copy information; but normally, you do include it in your export, especially if you're sending data in for enhancement. When this box is checked, ALL the copies for the title are exported except:
 - When you've chosen an Acquisition date, Call Number, or Category range, where only the copies in the selected range are exported.
 - An Export via PHD, where only the copies scanned are exported.

Export includes all the copy fields except two: The Copy Note and the Circulation Note are not exported to a MARC file. These fields are actually text files that have no corresponding subfield in the 852 tag.

- **Delete Titles/Copies After Export:** This option is usually used for clean-up, or splitting a collection. Title records and all copies attached to the title are deleted, even if you're not exporting copy information. There are four exceptions:
 - If you're exporting by acquisition date, barcode, call number, or category range, *only* the copies in the selected range are deleted.
 - If you're exporting by PHD, only the copies scanned are deleted.
 - If a copy's status is not Available, Lost, or Missing, it is not deleted.
 - If a copy has a transaction (a fine, hold, or reserve) attached, it is not deleted.If any copies remain, the title record is not deleted.

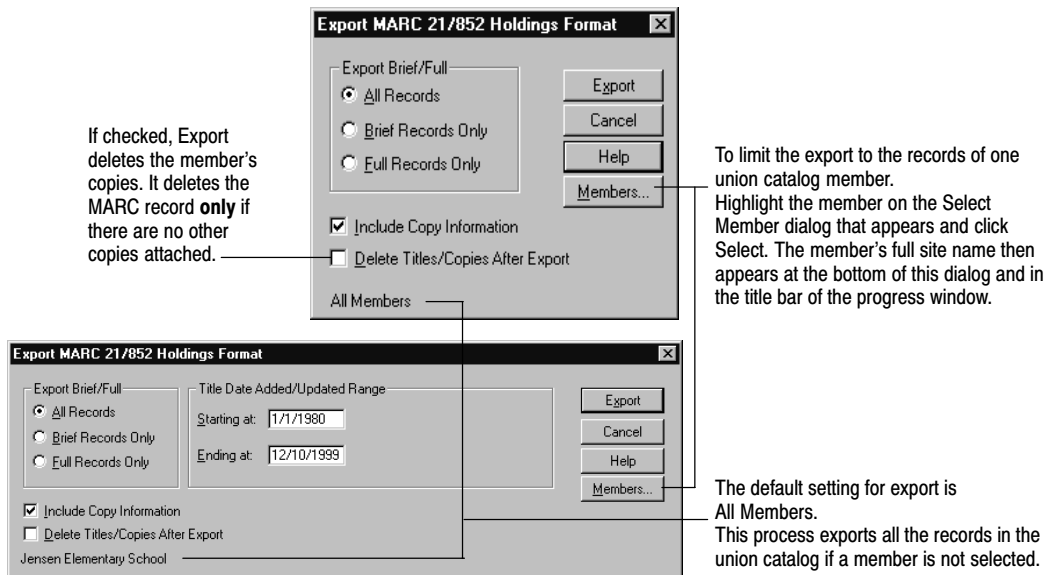
3. Once you have made your selections, click Export. A standard Save As dialog appears, where you specify the target destination drive and filename. After you enter the information, the export begins and a dialog appears, showing the progress. You can interrupt the export by clicking Cancel.

Note: If you are exporting via PHD, you will first see a PHD Communication progress dialog, or for a PHD Dolphin+, its File Transfer dialog. After the scans are transferred to the computer, the Save As dialog appears.

4. When the export is finished, if you selected to delete titles/copies after export, a message asks if you still want to delete those records. Choose Yes if you want to delete those records from your database, then respond to the next confirmation message. When the deletion is finished, click Close. An exception report may appear, listing any problems encountered during export (see page 321).

For Union Catalog Plus: Exporting MARC 21/852 Holdings Format

If you are cataloging in Union Catalog Plus, you have slightly different export dialogs. On each of them, you can choose to export all the records in the union catalog or select one member's holdings. The dialogs include a Members button and, at the bottom, either "All Members" (by default) or the name of the selected member. Export via PHD and by Category, however, are not available for union catalogs.

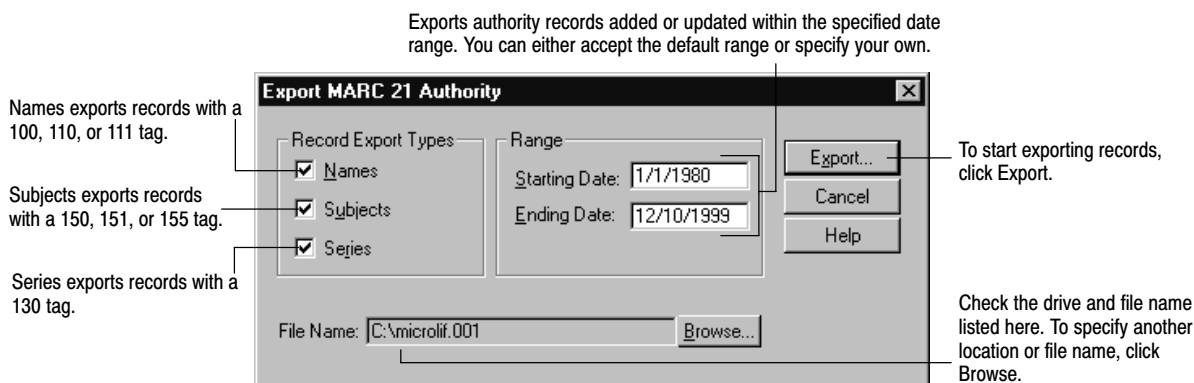


Note: If you choose a member and select to include copy information, only the copies of that member are exported with the MARC records.

Note: If you choose a member and select to delete titles/copies after export, the MARC record is not deleted if there are other members' copies attached to it. As a safety measure, any deletions of titles and copies are not transferred to member databases in Data Exchange.

Exporting authority records

To export authority records, from the Cataloging main window, choose File | Export MARC 21 Authority. The Export MARC 21 Authority dialog appears:



After selecting your export options, click Export. A progress dialog appears. To interrupt the export, click Cancel. When the export is complete, click Close.

Splitting a collection

At some time you may need to divide your collection because of a realignment in the school district, or the opening or closing of a school. Besides determining which library materials to move, and pulling them from the shelves, you'll need to remove their records from your database and add them to the destination library's database. Using the Follett applications, this process involves three tasks: identifying the copies that are moving to another library; creating MARC record files of those titles and copies for the "new" library's database; and deleting those records from the "old" library database.

There are two ways to accomplish these tasks, depending on the equipment you have. If you have access to a PHD, follow the instructions in the next section, "Using a PHD." If you do not have a PHD, follow the instructions in "Using categories" starting on page 319.

Before you begin, make sure that you have a current backup of the library database (see page 608), and that both libraries have set up the same barcode symbology in System Setup | Setup | Site | Barcodes | Library Materials.

Using a PHD

This method is the easiest to use. Make sure that you are familiar with your PHD. If not, refer to Appendix E or F for information about using your model. Also make sure your PHD is fully charged (or has new batteries), and that you have loaded the PHD application and erased any pre-existing scans in the PHD.

1. Scan the barcodes of the library materials as you collect them for packing. If the library materials are moving to more than one other library, scan the copies for one destination and process them before moving on to the next.

- If you are using a PHD+, PHD+ II, or a PHD Laser+, select the Inventory mode (press **I** on the main menu). The SCAN BARCODE prompt appears. Scan or type in the barcodes.
 - If you are using a PHD Dolphin+, choose **F1**–Circulation Plus from the main menu, then **F4**–Copies, and then **F1**–Scan Copies. Use the **ON SCAN** button to scan the barcodes.
2. When you have collected several scans, your next step is to export and delete the MARC records for those items.
 - a. Open Cataloging, and from the menu, select File | Export MARC 21/852 Holdings Format | via PHD.
 - b. On the Export MARC 21/852 Holdings Format dialog that appears, select All Records, select Include Copy Information (see page 315 for details), select Delete Titles/Copies After Export (see page 316 for details).
 - c. Select your PHD model and follow the on–screen instructions to connect the PHD and transmit the scanned barcodes.
 - d. When prompted, select the destination and name for the file. If the new library is on the same network, you can save the files to a network drive. If not, you can use floppy disks. Since you’ll probably create several files, number them sequentially. For example, split.001, split.002, split.003, and so on.
 3. When the export/delete process is finished, erase the scans in the PHD, and repeat steps 1 and 2 for all the library materials that are moving.
 4. When you are finished, import these MARC record files into the new library’s database. From the main menu of their Cataloging module, select File | Import MARC 21/852 Holdings Format. (See the previous chapter, “Importing MARC records,” for complete information.)

Using categories

If you don’t have access to a PHD, you’ll need some way to mark the copy records so that you can export and delete the records as a group. The easiest way is to assign a category to the copies that are moving, and then export and delete by that category. After importing the MARC records into the new library’s database, you can globally delete the category from the copies.

1. Open the System Setup | Setup | Cataloging | Categories tab at both libraries. Create a new category, perhaps named Split. Make sure to use the same code name and number at both libraries. If the library materials are moving to more than one other library, create a category for each destination (for example, Smith HS Materials, Jones HS Materials).
2. Open the Cataloging module. Select Edit | Individual Update from the main menu.
3. On the Individual Update dialog that appears, select Category from the Assign list, and your new category from the Of list.

4. From your shelves, collect the library materials that are moving. Scan or type their barcodes into the To Copy Barcode text box on the Individual Update dialog.

5. When you have scanned all the materials that are moving, your next step is to export the MARC records for the new library's database and delete them from the old library's database.
 - a. Close the Individual Update dialog, and from the menu, select File | Export MARC 21/852 Holdings Format | Category.
 - b. On the Export MARC 21/852 Holdings Format dialog that appears, select All Records, select Include Copy Information (see page 315 for details), and select Delete Titles/Copies After Export (see page 316 for details).
 - c. For the Category Range, select your new category for both the Starting At and the Ending At text boxes.
 - d. Click Export.
 - e. When prompted, select the destination and name for the file. If the new library is on the same network, you can save the file to a network drive. If not, you can use removable media. Export will prompt you to insert disks as needed. Remember to number them sequentially.
6. When you are finished, import this MARC record file into the new library's database. From the main menu of their Cataloging module, select File | Import MARC 21/852 Holdings Format, and click Import. (See the previous chapter, "Importing MARC records," for complete instructions.) Close the dialog when the import processing is finished.
7. In the new library, open the System Setup | Setup | Cataloging | Categories tab. To remove the category from all of the copies, highlight it in the list and click Delete.

After performing the steps for either method above, the splitting process is complete. Make sure to perform a new backup of both library databases.

Interpreting the exception report

When exporting bibliographic and copy records, you only have exceptions if you choose to delete the bibliographic records after export, and if, for some reason, a copy could not be deleted. When exporting authority records, exception messages are not generated. This report resides in the Follett folder in a folder named Exception Reports.

| Exception message | What it means |
|--|---|
| Title: <Title> Title not deleted due to Copy Status of <copy status> on Copy <barcode> | The record contained one or more copies that did not have a status of Available, Lost, or Missing, and so were not deleted. You may need to check in the copies to make them available before they can be deleted as part of the export processing. |
| Title: <Title> Title not deleted due to outstanding <fines, holds, fines and holds> on Copy <barcode> | One or more copies contains outstanding fines or holds (except expired holds). You need to address the outstanding fines or holds before these titles and copies can be deleted as part of export processing. |

Notes

Chapter 27 Maintaining your collection

In this chapter you'll learn how to use reports to analyze your collection, globally update selected headings and copy fields or delete specific tags, update selected fields in individual copies, and use your PHD for mass updates. You'll also learn why you might want to update keywords and rebuild your cross-references. Finally, you will see how to use the Book Cart to enhance your records.

Using reports to analyze your collection

It's important to keep a clean database for a number of reasons: your statistics are accurate; your data truly reflects your collection; and your patrons can locate more easily the materials they need. The Reports module comes with a number of cataloging and circulation reports to help you maintain your database. These reports may also show a need to create or update library policies. For details on running these and other reports, see the Reports section, beginning on page 485.

Brief Records: This report identifies records that need to be enhanced. Make sure these records have standard numbers and correct titles so they can match against Alliance Plus and imported records.

Copies by Funding Source or Vendor: Retrieve detailed or summary information about your funding sources or vendors. In the copy list form, you can use the report to identify the copies you purchased with certain funds or from certain vendors. In summary form, you can see your total acquisitions for each funding source or vendor.

Copies With Other Call Numbers/Copies Without Call Numbers/Copies With Different Call Numbers: Call number searches look at the copy record. So, when you or your patrons search by call number, you may not locate them. In addition, when these copies are circulated, the statistics might not go to the right call number prefix. Statistics on unrecognized or missing call number prefixes accumulate in the OTH call number prefix group.

Copy List by Circulation Type: This report identifies copies that have a particular circulation type assigned to them. Run this report for assistance when removing or changing circulation types.

Headings Without Authorities: If you maintain authority records, you can examine your bibliographic records to discover the headings in them that do not have corresponding authority records. With this report, you can correct the headings in the bibliographic records, or create new authority records, or add entries to them. Also use this report when running Global Update Headings.

Titles With Duplicate Standard Numbers: Duplicates can cause problems in your database. Make sure the correct numbers appear in your records. (It's

possible that you may legitimately get duplicate LCCNs; in those cases, try to get a unique ISBN for the record.) Correct standard numbers are important to support matching against Alliance Plus and when importing records.

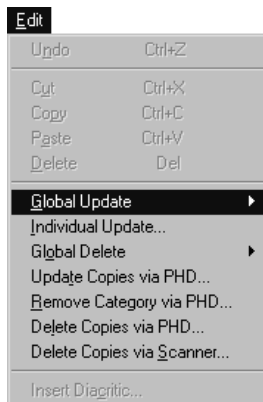
Titles Without Copies: Look at this report when ordering materials. If you are not replacing the copies, you may want to delete the titles. If you keep them, they show up in OPAC, but there won't be any copies for your patrons. Print this report before running Global Delete Titles Without Copies to preview the results.

Titles Without Standard Numbers: Without standard numbers, these records will not match when running an Alliance Plus autorecon, and will not be enhanced. The MARC import process does not recognize these records either, and may create duplicates in your database.

Copy List by Status (Missing or Lost) or Inventory List by Call Number or Title (Missing): Do you have a policy on how long to keep records for lost or missing copies? You may want to order replacements for the copies on these lists. If not, you can delete the copy records with Global Delete Lost Copies or Global Delete Missing Copies.

Weeding Log: Every time you delete a copy, Cataloging adds an entry to this cumulative log, located in your Exception Reports folder. View this log when ordering replacement materials, creating budgets, or year-end reports.

Updating bibliographic headings globally



The Global Update Headings feature lets you quickly find and update selected subfields in your bibliographic records. This lets you improve the consistency of the author, subject, and series headings in your database, consequently making it easier for you and your patrons to find items.

For example, when you search on *Huckleberry Finn*, you notice that most of the copies are attributed to Mark Twain, but several of the older records in your collection refer to the author as Samuel Langhorne Clemens. Global Update Headings lets you update all of these headings at one time rather than editing each record separately.

1. From the Cataloging main window, choose Edit | Global Update | Headings. The Global Update Headings dialog appears:

Identify the method you want to use to search the library database. To search all the bibliographic records in the database, choose All Records.

Select a range of authors, subjects, or series to search. For instructions on selecting the starting and ending records, see page 314.

Select the type of tags you want to update. Please note that only indexed tags are updated. For a list of the indexed tags, see Appendix B.

Enter the subfield codes and text you want to update. To ensure that you find the correct heading, it's a good idea to include the complete heading. The sequence of the subfields, and the spelling and punctuation of the text, must match the tags you want to change exactly.

To disregard capitalization, select "Ignore case."

Enter the new subfield codes and text. Please note, the subfield information you enter replaces all of the subfields used to define your search. So, if you searched for the complete heading, you need to replace the complete heading, even if the information in certain subfields isn't changing. For example, in this instance since subfield `d` is being used to help find the correct heading, it must be included in the replacement criteria, even though it's not changing.

After entering your search and replacement criteria, click Search to locate the first matching record. While Cataloging searches for a match, a progress dialog appears.

- When Cataloging finds the first match, the Global Update Heading - Replace Tag dialog appears. Use the information in this dialog to help you decide whether to update the tag or not:

The bibliographic record with the matching tag

The current contents of the tag

How the tag will look after Cataloging updates the subfields

Updates this tag and then searches for the next match

Skips this tag and searches for the next match

Updates all the matching tags, within your search range

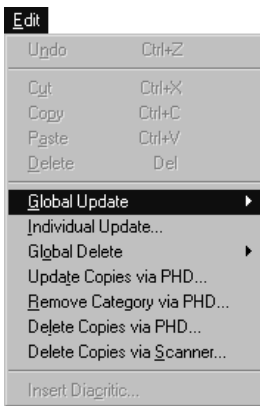
- 3. After reviewing the information, indicate how you want to proceed with the update. Unless you click Cancel, a progress dialog appears while the record is updated (or skipped) and Cataloging searches for the next match.

Note: Cataloging won't apply changes that would invalidate the tag. Even if you choose Update, a message appears instructing you to skip the tag.

If you select Update All, once processing is complete, the application generates an exception report. This report identifies each record and tag that was updated without being reviewed, as well as the changes made.

Warning: All changes made to your records are immediate. You cannot reverse changes that have been made by canceling the process.

Updating copy information globally



Global Update Copy lets you quickly search your entire collection for specific copy information and replace it. Using this feature, you can update the call number prefix, circulation type, sub location, vendor, funding source, or enumeration description for all the copies in your collection.

For example, to make the call numbers of your general fiction titles consistent, you might want to change all instances of the prefix [Fic] to FIC.

Note: In the context of this application, a call number prefix is the non-Dewey data to the left of the first blank space or period in the copy record's call number field (see page 286). When the application updates a prefix, the remainder of the call number is unchanged.

From the Cataloging menu, choose Edit | Global Update | Copy.

For Union Catalog Plus: You'll need to select all members or a single member.

The Global Update Copy dialog appears:

 Two screenshots of the 'Global Update Copy' dialog box. The top screenshot shows the 'Copy Information' dropdown set to 'Call Number Prefix' and the 'Search for' field empty. The bottom screenshot shows the 'Copy Information' dropdown set to 'Vendor' and the 'Replace with' field empty. Annotations with arrows point to the 'Copy Information' dropdown, the 'Search for' field, and the 'Replace with' field.

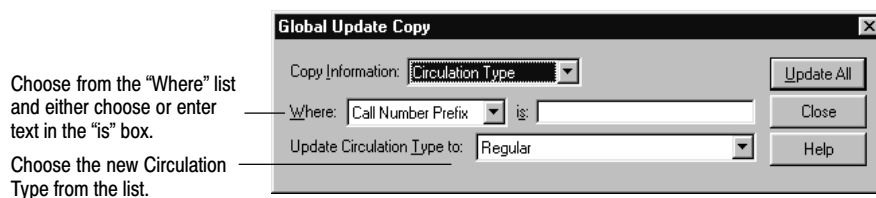
Enter the text you want to change. Please note that the search is case sensitive. For example, a search on [Fic] does not find the prefix [fic]. You'll need to run a second update with [fic] as your search term. Enter the replacement text for that field.

Select the copy information field you want to update.

Tip: If you are updating Sub Location, you can add information to blank fields or delete data by leaving either text box empty. To update vendor or funding source, click Select to choose from your list.

You can globally update circulation type by call number prefix, category, and even circulation type in much the same way as the other global updates.

Choosing Circulation Type, in the Global Update Copy dialog, lets you quickly update materials for new units or research projects. (For instance, you could change a circulation type of Regular to a circulation type of Non-Circulating to keep those materials in the library.)



After entering your selections, click Update All. While Cataloging searches for matching copies, a progress dialog appears. When the process is finished, the application generates an exception report if any errors were encountered.

Warning: All changes made to your copy records are immediate. You cannot reverse changes that have been made by canceling the process.

Adding funding sources or vendors to their tables

For version 5.0, we created the Acquisitions module. It added indexed tables to the database for funding sources and vendors that replace the drop-down (MRU) lists in the Copy Editor. These new tables allow you to edit the contents and record additional information about your funding sources and vendors.

Adding your existing funding source and vendor names to the tables involves three steps: generating a report; adding the funding sources and vendors to the tables; and then updating your copy records so that they link to the tables.

For brevity, the following instructions are for updating your vendors. The procedure for updating your funding sources is the same.

1. To discover which of your vendors are not in the vendor table, generate a Copies by Funding Source/Vendor Report (page 507). Under "Copies by," choose Vendor. Under Report, choose Summary. Leave the other options at the default settings. The resulting Vendor List marks any non-indexed (that is, not in the tables) vendors with two asterisks. (For complete information about this report, see page 507.)

Example: You generate the Vendor List (as above) and notice that many vendors are preceded by **. You also see (because the old drop-down list was not editable) that there are multiple entries for the same vendor as in the following illustration. This procedure can update your copy records and combine these vendor variations into one entry in the table.

| Vendor List | | | |
|------------------------------------|--------|---------------------|-------------|
| Vendor | Copies | Copies w/o price | Total Price |
| | | | |
| | | | |
| **Folet A/V | 43 | 27 | \$328.95 |
| **Follett A/V | 178 | 36 | \$2,810.45 |
| **Follett Media Distribution | 594 | 122 | \$9,340.63 |
| | | | |
| | | | |
| *** indicates a non-indexed Vendor | | | |

2. To add a vendor to the table, open the Select Vendor dialog. Since we'll be using the Global Update Copy dialog, we can access the Select Vendor dialog from there. (You can also access this dialog from the Select button next to the Vendor field in the Copy Editor, or from System Setup | Setup | Acquisitions | Vendor tab, among others.)

On Cataloging's menu, choose Edit | Global Update | Copy.

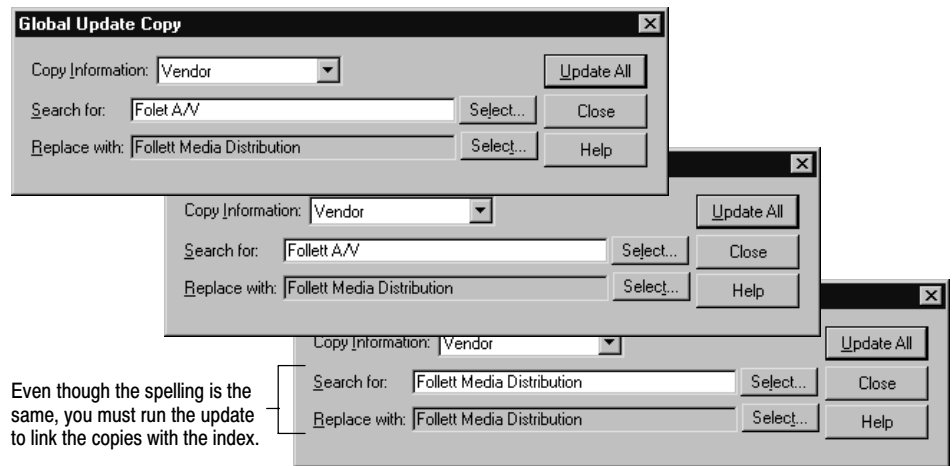
- a. On the Global Update Copy dialog that appears, choose Vendor from the Copy Information list.
- b. Click the Select button next to the Replace with text box.
- c. On the Select Vendor dialog that appears, click New.
- d. Enter your preferred vendor name and a code (three alphanumeric characters). The other fields are optional. You can change any of the fields at a later date. (Use System Setup | Setup | Acquisitions to edit the vendor name.)
- e. When you are finished, click Save on the Add Vendor dialog.
- f. Back on the Select Vendor dialog, highlight the vendor you just created, and click Select. The vendor name then appears in the Replace with text box on the Global Update Copy dialog.

Example: To continue the above example: You decide to use "Follett Media Distribution" as the preferred term and "FMD" for the code. The top of the Add Vendor dialog would look like this:

3. To update your copy records and link them to this vendor:
 - a. In the Search for text box on the Global Update Copy dialog, type in the non-indexed vendor name, *exactly* as it appears on the Vendor List (but *without* the asterisks).

- b. Click Update All and then Yes to the message.
- c. In the Global Update Copy progress dialog, verify that the number of Copies Updated matches the number under Copies on the Vendor List. Click Close.

Example: To update the copies that have “Folet A/V,” “Follett A/V,” and “Follett Media Distribution” in the vendor field and link them with the table entry “Follett Media Distribution” that you just created, run Global Copy Update three times, once for each entry on the Vendor List. Even if your copy records already have “Follett Media Distribution” in them, you must run the update to link them with the indexed table entry, “Follett Media Distribution.”



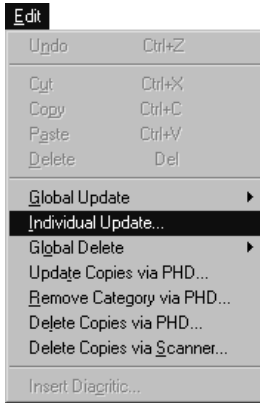
- 4. Working with your Vendor List, continue adding new vendor names to the table, and then updating and linking the copies to them.

When you are finished, run the Vendor List again. You should see entries without asterisks. Note that the following entry (from our example) shows the preferred name and the correct totals for copies and prices from this vendor:

| Vendor List | | | |
|----------------------------|--------|------------------|-------------|
| Vendor | Copies | Copies w/o price | Total Price |
| | | | |
| | | | |
| Follett Media Distribution | 815 | 185 | \$12480.03 |
| | | | |
| | | | |

If any Vendor List entries are still preceded by asterisks, repeat this procedure.

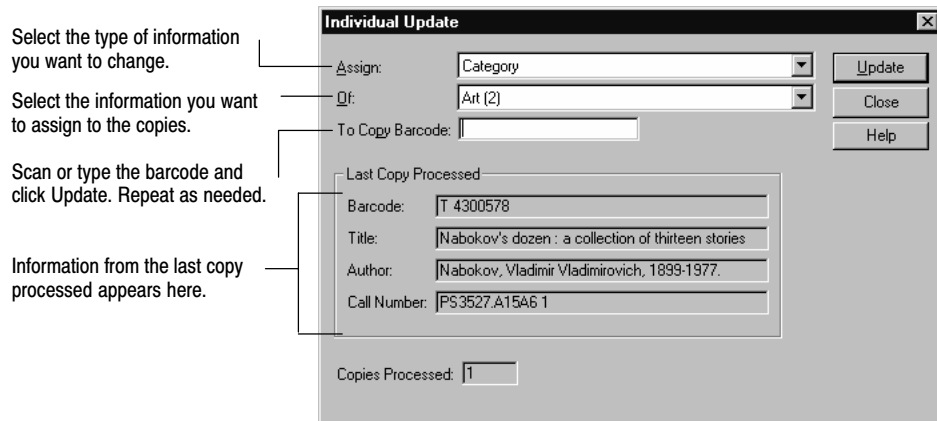
Updating individual copies



This feature lets you assign a category, circulation type, or copy status quickly and easily to a number of copies one at a time. It's useful when you want to make the same change to a group of copies. For example, if you maintain a category for items purchased using funds from Title VI, you can quickly assign the appropriate category to an entire box of items. Likewise, you could update the copy status of books that you're sending to the bindery.

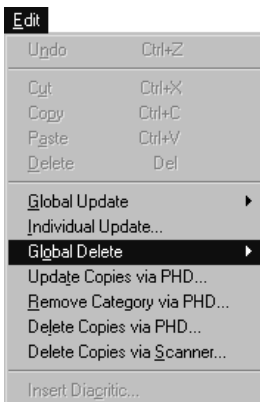
For Union Catalog Plus: This feature is not available.

First gather the copies you want to update or make a list of their barcode numbers. Then, from the Cataloging main window, choose Edit | Individual Update. The Individual Update dialog appears:



If you accidentally assign the wrong category, circulation type, or status to copies, you can remove it en masse with a PHD (see "Removing categories from copies with a PHD," page 340) or individually through the copy record (see page 286). You can also completely delete the category from the system (see page 54).

Deleting lost or missing copies globally



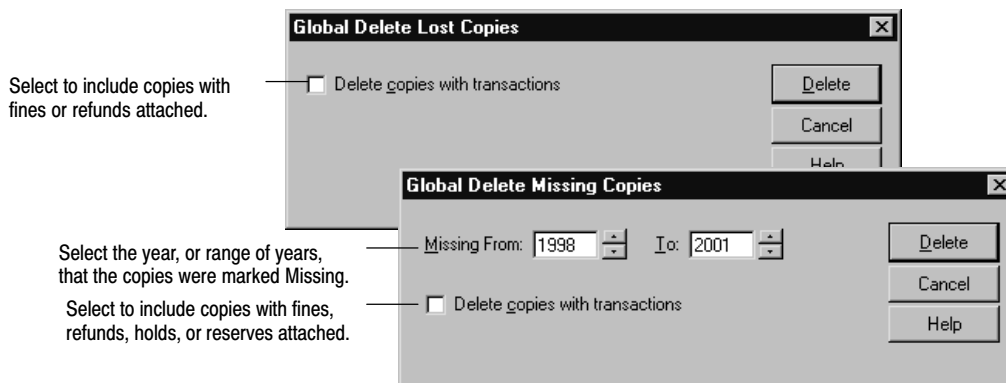
With Global Delete Lost Copies or Global Delete Missing Copies, Cataloging searches your entire collection and deletes copy records that have a copy status of Lost or an inventory status of Missing. These features (available only if you purchased Circulation Plus) allow you to remove any unneeded copy records from your database that were made lost or marked Missing in a particular year or range of years.

Deleting your Lost and Missing copy records helps to maintain an accurate database. It also reduces the occurrence, in OPAC, of patrons locating copies with a status of OUT that may never become IN.

Warning: All deletions are immediate. You cannot undo them by canceling the process. The data cannot be recovered.

To delete your Lost or Missing copies:

1. From the menu, select Edit | Global Delete | Lost (or Missing) Copies. The Global Delete Lost (or Missing) Copies dialog appears:



2. For Missing copies, select the year or range of years that the copies to be deleted became Missing. The range is inclusive. Selecting 1998 to 2001, as in the above dialog, will delete copies that were marked Missing over four years.

Example: If you want to delete all the copies that have been Missing for, say, three years or longer, and it is now the year 2002, you would set the two date boxes to **1990** (the approximate year that you took your first Inventory in Circulation Plus) and **1999**. Any copies that were marked Missing after Inventory in 2000, 2001, or 2002 remain in your database.

3. To delete copies that still have fines or refunds due, select the check box.
4. To begin the processing, click Delete and confirm your choice. A progress window appears.
5. When processing is finished, click Close to return to the main window.

Cataloging generates an exception report for this process. The report lists the title, standard number, and copy barcode of each deletion, includes any errors, and provides a total count of deletions and of errors.

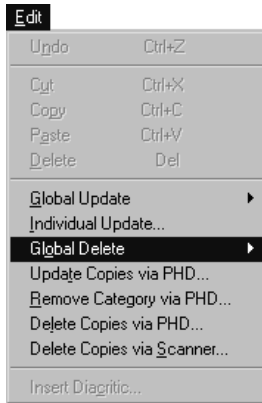
To determine, beforehand, which copies the process would delete, generate a Copy List by Status, selecting either the Lost or Missing copy status, and for Missing, choosing the desired year range (see page 551).

To also delete the title's MARC record if no other copies are attached to it, select the Delete Title When Last Copy is Deleted check box on the System Setup | Cataloging | Misc tab. (For this setup change to take effect, make sure to close and reopen the Cataloging module before running Global Delete.)

Or, for the same purpose, run the Global Delete Titles without Copies process afterwards (see page 335).

For Union Catalog Plus: These features are not available.

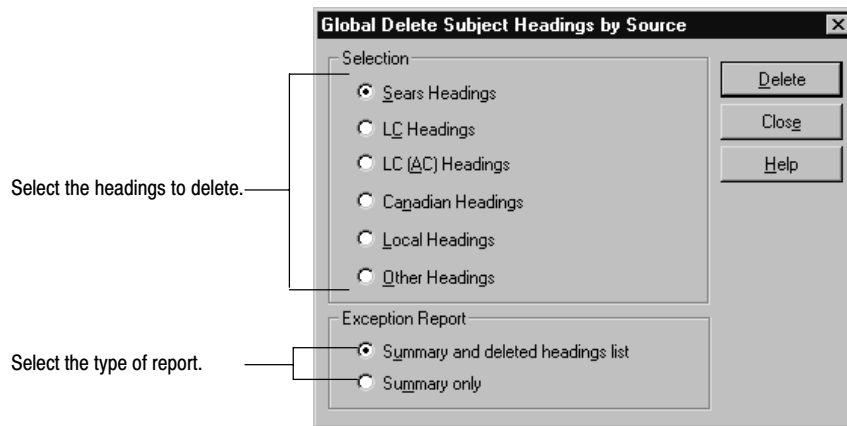
Deleting subject headings by source globally



The Global Delete Subject Headings by Source feature lets you quickly find and delete selected subject tags in your bibliographic records. This lets you improve the uniformity, and reduce duplication, of the subject headings in your database.

If you purchase our Authority Record Service and opt to import LC or Sears headings only, this feature can help you align your bibliographic records with your authority records. This makes it easier for you and your patrons to find items in your collection.

From the Cataloging main window, choose Edit | Global Delete | Subject Headings By Source. The dialog appears:



To delete your subject headings:

1. Choose the type of headings that you want to remove from your records.

This feature looks at each 600, 610, 611, 630, 650, 651, and 655 tag (and 690–699, if you choose Local Headings) in your bibliographic records. It deletes the entire tag if it matches these criteria:

| If you choose to delete: | The tags with these contents are deleted: |
|--------------------------|---|
| Sears headings | 2nd indicator of 7 and a subfield 2 containing “sears” |
| LC headings | 2nd indicator of 0 |
| LC (AC) headings | 2nd indicator of 1 |
| Canadian headings | 2nd indicator of 5 or 6 |
| Local headings | 2nd indicator of 7 and subfield 2 containing “local” plus all 690—699 tags regardless of indicators |
| Other headings | 2nd indicator of 2, 3, or 4 (or 8 or 9) or 2nd indicator of 7 and a subfield 2 that does not contain “sears” or “local” |

2. Choose whether you want the exception report to include a list of the deleted subject headings. For faster processing, choose Summary only where the report includes only summary information and processing errors.
3. Click Delete. A progress dialog appears.

Warning: All changes made to your copy records are immediate. You cannot reverse changes that have been made by canceling the process.

4. When its Cancel button changes to Close, click it to return to the main window of Cataloging.

After the processing finishes, Cataloging generates an exception report. The Summary contains the number of records modified and the number of tags deleted, along with any processing errors. The Summary and Deleted Headings List includes a list of the deleted subject headings. Neither one lists the titles of the bibliographic records that were modified.

If you have authority records and cross-references in your database, you may have some blind cross-references after running this deletion. We recommend that you rebuild your cross-references (from the Tools menu) after performing the Global Delete Subject Headings by Source. Please allow extra time for this. For instructions on rebuilding cross-references, see page 346.

If you would like to “preview” the results of deleting one or more types of headings:

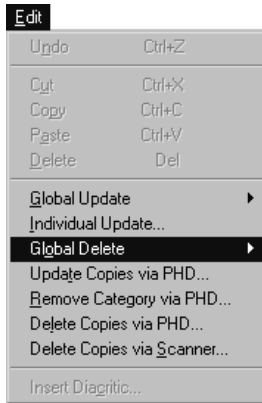
1. Perform an export of all your MARC records. To minimize the file size, do not select the Include Copy Information check box.
2. Run the Global Delete Subject Headings by Source.
3. Rebuild your cross-references.
4. Perform several searches in Cataloging or OPAC.
5. If you find that this global delete reduced your subject access points to an unacceptable level, import the exported file. Make sure to import by control number (see page 296).
6. Rebuild your cross-references again.

DX-enabled union catalogs and members

Please note that the deletions occur only in the local database. DX (Data transfer) is automatically suspended while the Global Delete Subject Headings by Source feature is running. Once the processing is finished, DX resumes automatically. This suspension ensures that the deletions are not propagated throughout the union.

Also be aware that you may need to repeat this global delete periodically. Data Exchange transmits records according to its survival rules, where the records with the most complete information are saved to the union catalog database and sent to members. Depending on your participation level and on the completeness of the records in your union catalog, you may later receive records that contain the deleted heading type.

Deleting tags globally

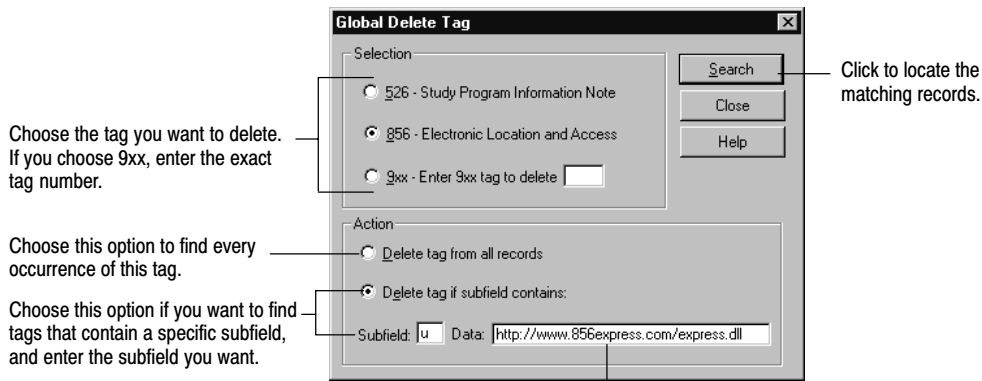


With Global Delete Tag, you can find and delete any of the following bibliographic tags that contain obsolete, unwanted, or incorrect information:

- 526—Study program information note
- 856—Electronic location and access (hyperlinks)
- 9xx—Local information

This feature allows you to delete all occurrences of a tag, tags that have a certain subfield, or only tags that have a certain subfield containing specific information.

1. To delete the bibliographic tags, from the Cataloging main window, choose Edit | Global Delete Tag. The Global Delete Tag dialog appears:



If you want to locate tags that contain specific information, enter the subfield data you want to find here. If you specify a subfield and leave the Data text field blank, the process finds every occurrence of the specified tag/subfield combination.

If you specify the subfield contents, you can enter up to 100 characters, but you do not *need* to enter the entire contents of the subfield. If the data you enter is at the beginning of the subfield, the process considers it a match. Please note that the search is case-sensitive.

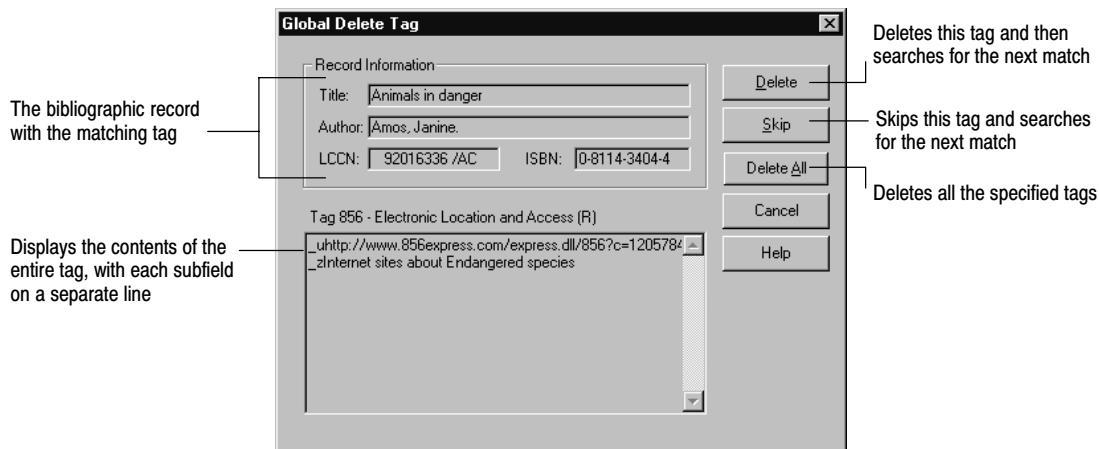
Examples: To delete WebPath Express bibliographic tags from your records, you need to find specific data in subfield u of the 856 tag. From the Global Delete Tag dialog, select the “856 - Electronic Location and Access” and the “Delete tag if subfield contains” options. In the Subfield text box, enter **u**. Since all WebPath Express URLs begin with the same characters, in the Data text box, enter **http://www.856express.com/express.dll**.

If you want to delete 526 tags containing Accelerated Reader information, enter **a** in the Subfield box and **Accel** in the Data text box. The process considers any 526 tag, with that string of characters at the beginning, to be a match.

After entering your search criteria, click Search to locate the first matching record. While Cataloging searches for a match, a progress dialog appears.

2. When Cataloging finds the first match, the Global Delete Tag dialog appears, displaying the first matching record, listing the title, author, standard

numbers, and the targeted tag. Use this information to help you decide whether to delete the tag or not:

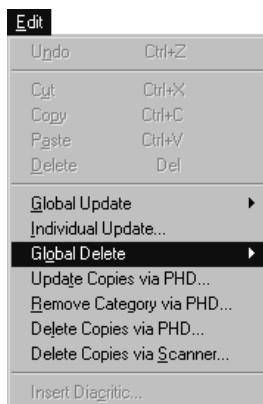


- After reviewing the information in the dialog, indicate how you want to proceed. Unless you click Cancel, a progress dialog appears while the tag is deleted or skipped and Cataloging searches for the next match.

If you select Delete All, once processing is complete, the application generates an exception report. This report identifies all of the records edited by the Delete All process. This report identifies the title, LCCN, and the tag number that was deleted.

Warning: All changes made to your records are immediate. You cannot reverse changes that have been made by canceling the process.

Deleting titles without copies globally



With Global Delete Titles Without Copies, Cataloging finds and deletes all title MARC records in your database that have no copies attached to them. Optionally, you can choose to preserve certain MARC records that have no copies but *do* have usable links to electronic resources. Use this feature to remove unneeded or duplicate records from your database. Search results in OPAC then include only titles with actual copies (or links) for your patrons.

Warning: All deletions are immediate. You cannot undo them by canceling the process. The data cannot be recovered.

To delete the title records:

1. From the menu, select Edit | Global Delete | Titles Without Copies. The Global Delete Titles Without Copies dialog appears:



2. To preserve eBook records, select the first check box. Cataloging considers any MARC record with **a** in position 6 of the 000 (Leader) tag and **s** (= electronic) in position 23 of the 008 tag to be an eBook.

To preserve WebPath Express bibliographic records (this process does not examine authority records), select the second check box.

To preserve any record containing information in an 856 tag, such as a cataloged Web site or link to other electronic media, select the last check box.

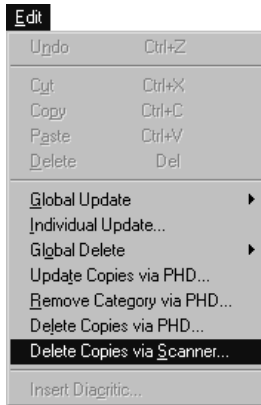
3. To begin the processing, click Delete and confirm your choice. A progress dialog appears.
4. When processing is finished, click Close to return to the main window.

Cataloging generates an exception report for this process. The report lists the title and standard number of each deletion, includes any errors, and provides a total count of deletions and of errors.

To determine, beforehand, which titles would be deleted by this process, you may want to generate a Titles Without Copies Report (see page 533).

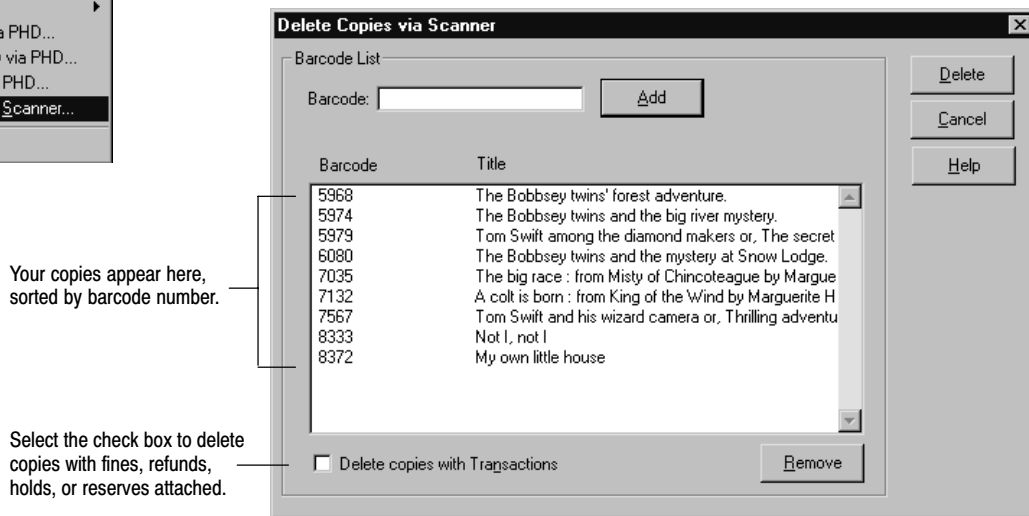
To *automatically* delete a title record when you delete its last copy, open the System Setup | Cataloging | Misc tab and select the Delete Title When Last Copy is Deleted check box. Remember, for this setup change to take effect, you must close and reopen the Cataloging module.

Using a scanner to delete copies



Delete Copies via Scanner lets you remove copies from your database by creating a list of their barcodes. You can create the list either by scanning the barcodes or by manually typing in the barcode numbers. Use this feature when weeding books from your collection.

1. From the menu in Cataloging, select Edit | Delete Copies via Scanner. The dialog appears:



2. Scan the barcodes of the copies that you want to delete. You do not need to press Enter or click Add for each one.
If you are typing in the barcode numbers, press Enter or click Add after entering each one.
To delete a number from the list, highlight it and click Remove.
3. Choose whether to delete the copies if they have fines, refunds, holds, or reserves attached to them.
4. To begin the processing, click Delete, and then click Yes to the confirmation message. The progress dialog appears.

Warning: All deletions are immediate. You cannot undo them by canceling the process. The data cannot be recovered.

5. When the Cancel button changes to Close, click it to view the exception report, then return to the main window of Cataloging.

If you also want the title record deleted if no other copies exist, make sure you have selected the check box in System Setup | Setup | Cataloging | Misc.

The deleted copies are listed on the exception report along with any errors encountered during the processing.

For Union Catalog Plus: This feature is not available.

Using your PHD for mass updates

With a PHD, you can assign categories, circulation types, or copy status to copies, remove categories from copies, and delete entire copy records. As with all PHD functions, you should already have loaded the PHD application (see page 42) before scanning barcodes.

Warning: Remember to erase any previous scans in your PHD so that no records are unintentionally changed or deleted.
To erase scans from a PHD+, PHD+ II, or PHD Laser+, see page 664.
For a PHD Dolphin+, see page 679.

See also: For instructions on collecting copy scans with the PHD+, PHD+ II, or PHD Laser+, see “Collecting inventory, copy, or patron data” on page 663.
To collect copy scans with a PHD Dolphin+, see page 677.
To generate a Title List, see page 525.

For Union Catalog Plus: The PHD features are not available.

Updating categories, circulation types, or copy status with a PHD

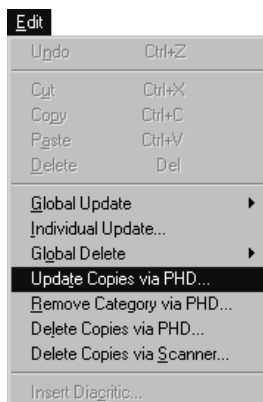
You typically assign categories and circulation types after importing records that don't contain that information, or when changing circulation types or adding new categories to existing records. You can assign a copy status to the copies stored in the PHD. Use the copy status option for items you are loaning out to another library or sending off to the bindery.

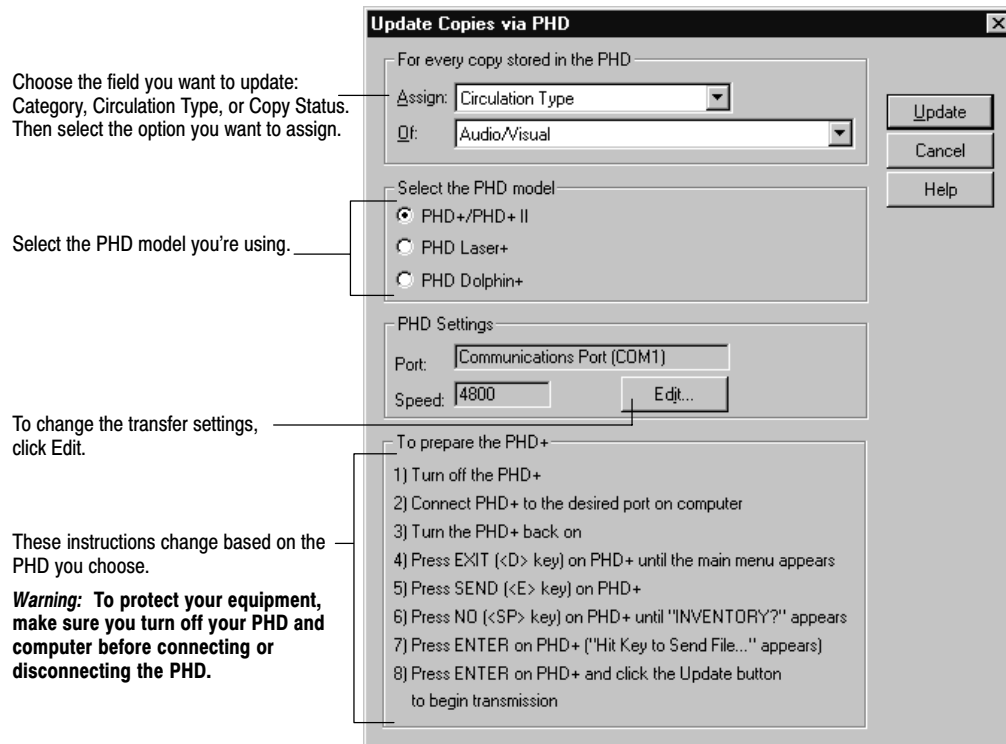
Warning: All changes made to your copy records are immediate. You cannot reverse changes that have been made by canceling the process. Remember to erase any previous scans in your PHD so that no records are unintentionally changed. To erase scans from a PHD+, PHD+ II, or PHD Laser+, see page 664. For a PHD Dolphin+, see page 679.

1. With your PHD, scan the barcodes of the copies you want to update. When you finish collecting scans, connect your PHD to your computer.

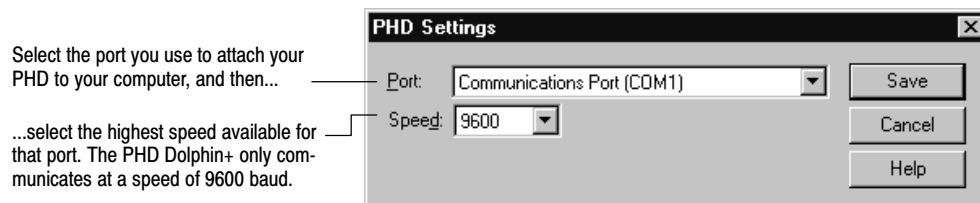
To make sure you've scanned the correct barcodes, you may want to generate a list of the copies stored in your PHD before updating them.

2. From Cataloging's main window, choose Edit | Update via PHD. The following dialog appears. Select the field you want to update and how you want to change it:





3. Select the PHD model you're using. If you don't need to change the transfer settings, skip to step 4. Otherwise, choose Edit. The PHD Settings dialog appears:



Set the port and speed for your PHD, and click Save.

4. Once you've selected the correct PHD model and adjusted the PHD settings as desired, simply follow the instructions displayed on the dialog.

When you click Update, a confirmation message appears. To continue, click Yes. Once the data transfer process begins, a progress dialog appears. When the process is complete, close the progress dialog and carefully check the exception report.

Interpreting the exception report

Any errors encountered during the update are entered on an exception report. This table lists the possible errors and their meanings:

| Error message | Meaning |
|--|--|
| Can't add more than eight categories to copy <barcode> | The copy already has the maximum number (8) of categories assigned to it. |
| Copy <barcode> not found | The barcode coming in from the PHD couldn't be found in the database. |
| Copy status of <status> for copy <barcode> cannot be changed | The copy's current status is checked out, lost, or missing. |
| <X> of <Y> is already assigned for copy <barcode> | The copy was found, but it already had the selected category, circulation type, or copy status assigned to it. |

Removing categories from copies with a PHD

This option removes categories from copies (for example, the books you're taking off the "New fiction" list). If you want to permanently delete categories from the system, see "How to delete categories" on page 54.

Warning: All changes made to your copy records are immediate. You cannot reverse changes that have been made by canceling the process. Remember to erase any previous scans in your PHD so that no records are unintentionally changed. To erase scans from a PHD+, PHD+ II, or PHD Laser+, see page 664. For a PHD Dolphin+, see page 679.

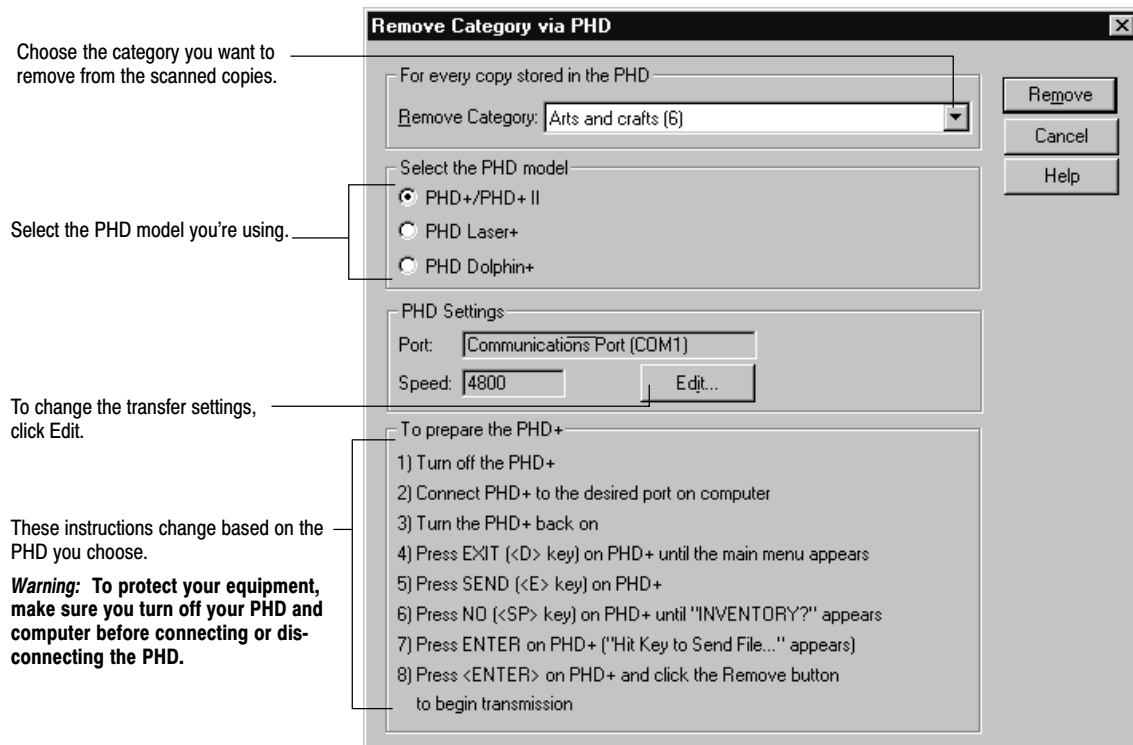
1. With your PHD, scan the barcodes of the copies from which you want to remove categories. When you finish collecting scans, connect your PHD to your computer.

To make sure you've scanned the correct barcodes, you may want to generate a list of the copies stored in your PHD before updating them.

See also: For instructions on collecting copy scans with the PHD+, PHD+ II, or PHD Laser+, see "Collecting inventory, copy, or patron data" on page 663. To collect copy scans with a PHD Dolphin+, see page 677. To generate a Title List, see page 525.



- From Cataloging's main window, choose Edit | Remove Category via PHD. The following dialog appears. Select the category you want to remove:



- Select the PHD model you're using. If you don't need to change the transfer settings, skip to step 4. Otherwise, choose Edit. The PHD Settings dialog appears. Set the port and speed for your PHD, and click Save.
- Once you've selected the correct PHD model and adjusted the PHD settings as desired, simply follow the instructions displayed on the dialog.

When you click Remove, a confirmation message appears. To continue, click Yes. Once the data transfer process begins, a progress dialog appears. When the process is complete, close the progress dialog and carefully check the exception report.

Interpreting the exception report

Any errors encountered during the process are entered on an exception report. This table lists the possible errors and their meanings:

| Error message | Meaning |
|--|--|
| Category not assigned to copy <barcode> | The copy was found, but it didn't have the selected category assigned to it. |
| Copy <barcode> not found | The barcode coming in from the PHD couldn't be found in the database. |

Deleting copies with a PHD

This option removes copies from your database (for example, the books you're weeding from the collection).

Warning: All deletions are immediate. You cannot undo them by canceling the process. Copies are deleted even if they're checked out, on hold, at the bindery, or missing. The data cannot be recovered. Remember to erase any previous scans in your PHD so that no copies are unintentionally deleted. To erase scans from a PHD+, PHD+ II, or PHD Laser+, see page 664. For a PHD Dolphin+, see page 679.



1. With your PHD, scan the barcodes of the copies you want to delete. When you finish collecting scans, connect your PHD to your computer.

To make sure you've scanned the correct barcodes, generate a list of the copies stored in your PHD before deleting them.

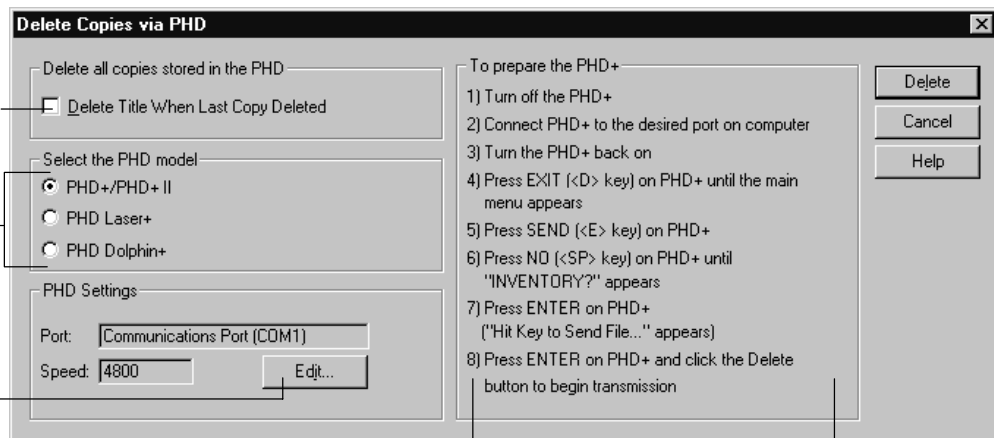
See also: For instructions on collecting copy scans with the PHD+, PHD+ II, or PHD Laser+, see "Collecting inventory, copy, or patron data" on page 663. To collect copy scans with a PHD Dolphin+, see page 677. To generate a Title List, see page 525.

2. From Cataloging's main window, choose Edit | Delete Copies via PHD. The following dialog appears. Decide whether you want to delete the title when its last copy is deleted. (If you selected the Delete Title When Last Copy is Deleted check box in System Setup, this check box is selected and disabled.)

To avoid ending up with titles in your database that have no copies attached to them, check this box.

Select the PHD model you're using.

To change the transfer settings, click Edit.



These instructions change based on the PHD you choose.

Warning: To protect your equipment, make sure you turn off your PHD and computer before connecting or disconnecting the PHD.

3. Select the PHD model you're using. If you don't need to change the transfer settings, skip to step 4. Otherwise, choose Edit, set the port and speed for your PHD, and click Save.
4. Once you've selected the correct PHD model and adjusted the PHD settings as desired, simply follow the instructions displayed on the dialog. When you click Delete, a confirmation message appears. To continue click

Yes. Once the data transfer process begins, a progress dialog appears. When the process is complete, close the progress dialog and carefully check the exception report.

Interpreting the exception report

Any errors encountered during the process are entered on an exception report. This table lists the possible errors and their meanings:

| Error message | Meaning |
|--|--|
| Copy checked out to <name> <barcode> made available | The copy is checked out. It's status is changed to available, then it is deleted. |
| Copy checked out to <name> <barcode> made available; Deleted Pending hold for patron <name> <barcode> | The copy has a pending hold (checked out to one patron with a hold on it from another patron). The hold is deleted, the status changed to available, and the copy deleted. |
| Copy deleted | Appears for each copy that's deleted. |
| Copy <barcode> not found | The barcode coming in from the PHD couldn't be found in the database. |
| Copy of status At bindery made available | The copy is located at the bindery. It's status is changed to available, then it is deleted. |
| Copy of status Loaned out made available | Copy is loaned out to another library. It's status is changed to available, then it is deleted. |
| Copy of status Lost made available | Copy is lost. It's status is changed to available, then it is deleted. |
| Copy of status Missing made available | Copy is missing. It's status is changed to available, then it is deleted. |
| Copy of status On hold made available; Deleted Ready hold for patron <name> <barcode> | Copy has a ready hold (is checked in and ready for the patron who has a hold on it). The hold is deleted, the status changed to available, and the copy deleted. |
| Deleted [refund or fine] of \$\$. \$\$ for patron <name> <barcode> | Copy has a refund or unpaid fine outstanding. The fine or refund is deleted, and the copy is deleted. |
| Title deleted | If you've selected to delete the title when the last copy is deleted, this message appears when that happens. |

Viewing the Weeding log

Every time a copy is deleted, Cataloging adds an entry to this cumulative log. View this log when ordering replacement materials or creating budgets and year-end reports. If you want a new log started at the beginning of a school or fiscal year, make sure to delete the old one.

Cataloging adds an entry to the log when deleting copies manually in the MARC Viewer, deleting copies after an export, deleting them via PHD or scanner, or globally deleting lost or missing copies. Please note that the Weeding log does not include copies deleted by DX or Utilities.



To access the log, from the computer desktop, open the Follett Applications folder and double-click the Exception Reports icon. You can also access the Follett Applications menu from the Windows Start | Programs menu or from the Mac OS Apple menu. The log resides in your CC40\TEMP folder. Its file name is WEEDING.TXT. (If Cataloging cannot write to the WEEDING.TXT file, it creates another one, WEEDING1.TXT, and enters the information there.)

Note: If you installed Catalog Plus to your individual workstations, and not to a server, each Cataloging workstation will have its own Weeding log. In this case, you'll need to combine the information in the logs.

The log is in a fixed-length ASCII format. That is, every field in the record is a fixed length. The first record in the log is a header line, containing the names of the fields included in the file. These fields and their widths are:

| | |
|------------------|------------------------------|
| Date deleted | 12 |
| Member ID | 12 (Union Catalog Plus only) |
| Barcode | 16 |
| Title | 42 |
| Author | 27 |
| Standard number | 18 |
| Call number | 18 |
| Acquisition date | 12 |
| Price | 12 |

Files in this format can be imported into a number of applications. For instance, if you import the file into a spreadsheet program, you can delete any fields you don't want, and then sort and filter the data to create custom lists and reports.

For example, to import your Weeding log into MS Excel, launch Excel and open your Weeding log. When you open any text file, Excel automatically launches a three-step Import Wizard:

1. Set the Original data type to Fixed width.
2. Set the field widths using the list (above).
(The number of hyphens in the second row indicates the field width.)
3. Keep the default column data format of General.

Excel imports the file, placing each field in a column with the field name in the first row and hyphens in the second.

Tip: For easier viewing, disable word wrapping in your text editor.

To edit the Weeding log easily . . .

. . . import it into a spreadsheet program.

| Deleted | Barcode | Title | Author | LCCN/ISBN/ISSN | Call Number |
|------------|----------------|-------------------------------|-------------------------|----------------|-------------|
| 2003-02-14 | 33976000650277 | Is there life in outer space? | Branley, Franklyn Mansi | | |
| 2003-02-14 | 3260400000563 | 1 + 1 take away two! | Berenstain, Michael. | | |
| 2003-02-14 | 33976000657348 | Baseball : run, throw & catch | Lloyd, Bryant, 1942- | | |
| 2003-02-14 | 33976000658387 | All creatures great and | | | |
| 2003-02-14 | 33976000659294 | Alsaciens et Lorrains en | | | |
| 2003-02-14 | 33976000658536 | Ancient cities | | | |
| 2003-02-14 | 33976000658585 | Classics : a very short | | | |
| 2003-02-14 | 33976000647729 | The ancient Greek Olympi | | | |
| 2003-02-14 | 33976000647737 | And then what happened. | | | |
| 2003-02-14 | 33976000647745 | Andrew Jackson | | | |
| 2003-02-14 | 33976000657306 | Andrew Johnson : sevente | | | |
| 2003-02-14 | 33976000647760 | Androcles and the lion | | | |
| 2003-02-14 | 33976000658627 | The concise guide to Jud | | | |
| 2003-02-14 | 33976000647778 | Angels, prophets, rabbis | | | |
| 2003-02-14 | 33976000648057 | The Ben Franklin book of | | | |
| 2003-02-14 | 33976000647802 | Animals in winter | | | |
| 2003-02-14 | 33976000658452 | Animals of the oceans | | | |
| 2003-02-14 | 33976000647810 | Ant cities | | | |
| 2003-02-14 | 33976000657314 | Antarctica | | | |

You can delete, rearrange, sort, and filter the rows or columns. You can run the Find feature to locate specific certain data, or, in combination with Replace, update it.

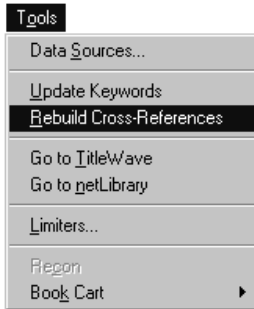
Updating keywords



If you set up Cataloging to create keyword entries as MARC records are saved (see the table on page 56), they are automatically entered into the keyword index as you add or modify records. If you did not set this up, you must periodically run the Update Keywords option (which indexes keywords from records recently added or updated) to make all your records available through keyword searches.

From Cataloging's main window, choose Tools | Update Keywords. A message appears, saying the process may take a long time. Click Yes to begin. As keywords are updated, the progress is shown in a scrolling display. You can cancel processing by clicking Cancel and verifying your choice. Otherwise, the update continues scrolling through each record until they've all been processed. Then the Cancel button changes to Close.

Rebuilding cross-references



Use the Rebuild Cross-References function to:

- Build an initial cross-reference index
- Rebuild a corrupted cross-reference index
- Remove blind cross-references (cross-references to indexable headings that no longer exist in the database because the bibliographic records containing them or the headings themselves have been deleted)

See also: For information about how authority records are used to create cross-references, see Chapter 23, “Using the MARC Editor.”

1. From Cataloging’s main window, choose Tools | Rebuild Cross-References. A message appears, asking you to confirm that you want to build the cross-references. To continue, choose OK. A progress dialog appears to track the process. When the process is complete, the Cancel button changes to Close. To close the progress dialog and return to the Cataloging main window, choose Close. A message appears informing you that an exception report was generated and asking if you want to view the report.
2. To view the exception report, choose Yes. If you don’t want to view the report, choose No. A message appears asking if you want to delete the report. If you choose Yes, the Cataloging main window reappears. No saves the report as a text file in the TEMP directory for viewing later.



Enhancing your records with the Book Cart

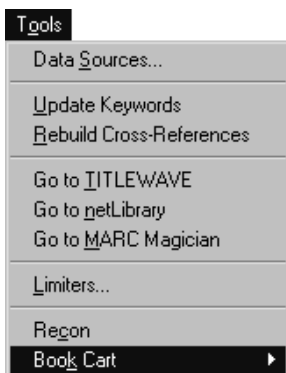
Use the Book Cart to improve the quality of your MARC records. You can place a selected group of records into the Book Cart and enhance them. Running an autorecon in the Book Cart, unlike Alliance Plus, does not require that the MARC records have copies attached. You can edit records using your preferred editor. If you have the MARC Magician program installed on your workstation, you can transfer records directly to and from MARC Magician, using the Book Cart. (MARC Magician is a separately-purchased application that corrects control field errors, punctuation, and indicators, and allows you to perform global editing. It is not, however, available for Mac OS.)

To open the Book Cart, select Tools | Book Cart from the Cataloging menu bar.

Adding titles to the Book Cart

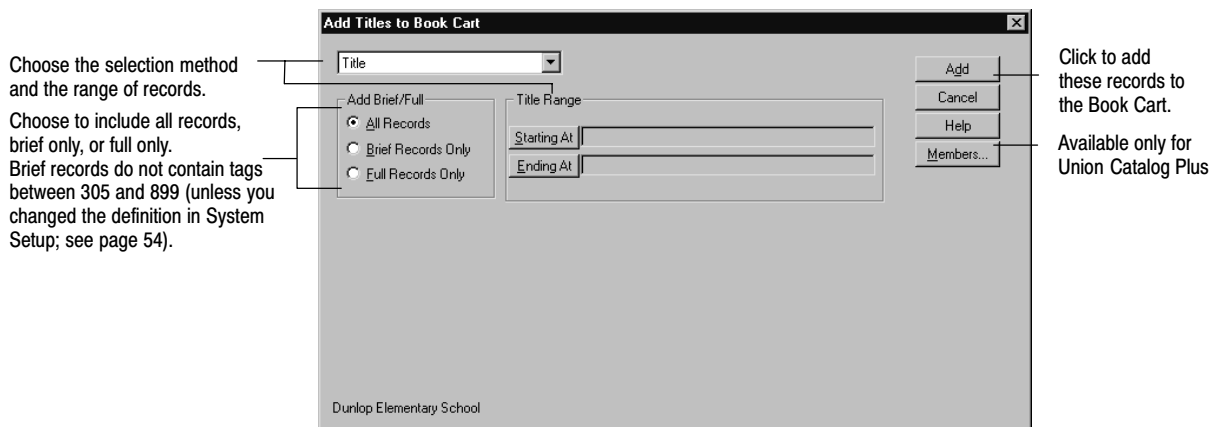
You can add an unlimited number of titles to the Book Cart using any combination of the following three methods:

- On import: Select the Add Titles to Book Cart check box on any Import MARC 21/852 Holdings Format dialog.
- One by one: Highlight a title in the selection list in Cataloging and click the Add to Book Cart button at the bottom of the search window, or select Tools



| Book Cart | Add Title from the menu. In the MARC Viewer, click the Add to Book Cart button.

- By range: To add a group of existing records to the Book Cart, select Tools | Book Cart | Add to Book Cart. The Add Titles to Book Cart dialog appears:



Select the method to search the database: Title, Author, Call Number, standard number, Subject, Acquisition Date, Title Date Added/Updated, Barcode, Category, or No Range (all records). Then select the range, or, if you chose standard number, enter your list of numbers. Choose to include brief, full, or both types of records.

For Union Catalog Plus: The Category selection method is not available.

Note: The MARC records added to the Book Cart include *all* the copy records attached to a title, even if you choose a copy field—call number, acquisition date, barcode, or category—and select just one copy.

The total number of titles in the Book Cart appears in the lower left corner of the window. Titles remain in the Book Cart until you close Cataloging or manually remove them, or until automatically removed by the recon or transfer process.

Reconning titles in the Book Cart

Using the Book Cart to recon records provides two advantages over running an Alliance Plus autorecon: You can select a subset of your collection to process; and the titles do not need to have any copies attached to them. The Book Cart does not distinguish between full and brief records; it reconns all the titles on its list.

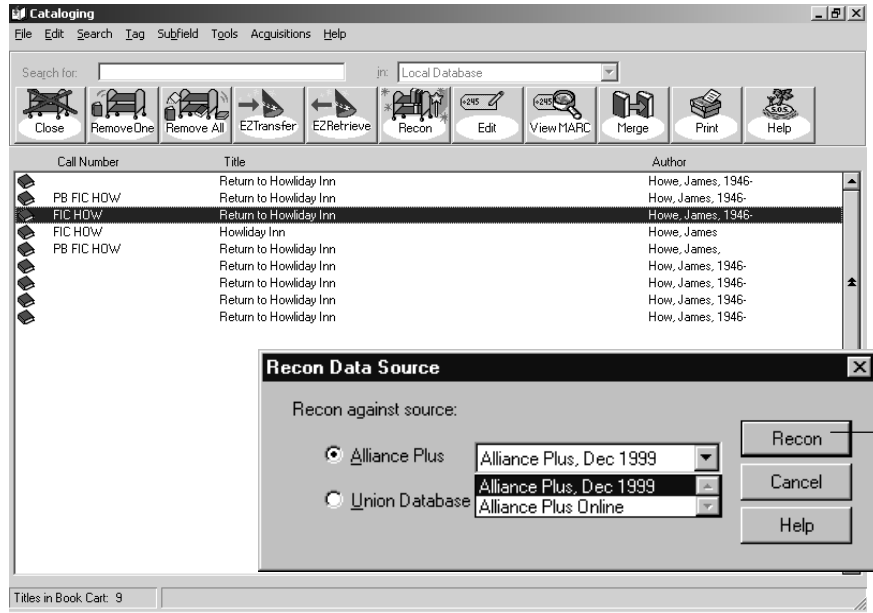
Once you have placed your titles into the Book Cart, open the Book Cart by clicking the Book Cart button, or by selecting Tools | Book Cart | View from the menu. To start the recon, click the Recon button and choose the data source against which you wish to recon. Click Recon to begin.

Once the recon is complete, records that have been replaced or updated are removed automatically from the Book Cart. Those remaining either have no standard number or have no matching record in the data source. Double-click the record or highlight a record and click the Edit button to enhance these records in

your default editor. You could also print a list of these misses and then process any brief records manually with the Process Misses feature in Alliance Plus (titles *do* need copies for this).

Note: Depending on the number of titles and the CD drive speed or the available bandwidth of your network, the recon process may take several hours.

See also: For more information about the autorecon process, see page 385.



The number of titles in the Book Cart appears on the status line.

Choose the data sources you wish to recon against and click Recon to begin.

Editing titles from the Book Cart

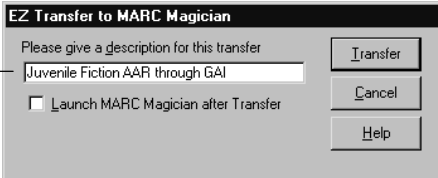
You can edit titles directly from the Book Cart. Double-click a record or highlight a record and click the Edit button to enhance the record in the default editor defined in System Setup or according to your Cataloging Access Setup.

Transferring your records to and from MARC Magician

If you have purchased MARC Magician (version 2.0 or higher) and installed it on your Windows workstation, you can transfer records to MARC Magician, enhance them, and send them back to the Book Cart. Make sure, in MARC Magician, that your Cataloging Option for Easy entry holdings is set to Follett Catalog Plus 5.0. (This feature is not available for Mac OS or Union Catalog Plus.)



To transfer records to MARC Magician, click the EZ Transfer button or select Tools | Book Cart | EZ Transfer from the menu. The EZ Transfer dialog appears:



Enter up to 60 characters to describe this group of records.

EZ Transfer to MARC Magician

Please give a description for this transfer

Juvenile Fiction AAR through GAI

Launch MARC Magician after Transfer

Transfer
Cancel
Help

Enter a description, up to 60 alphanumeric characters, for the group of records that are currently in the Book Cart. The description does not need to be in the form of a file name. You can use terms like "October shipment from FLR" or "Dewey 133.1-296.43."

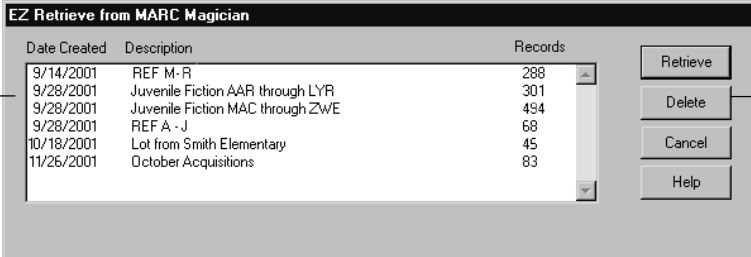
The transfer includes all copies attached to the titles. Please note that, because this is an export, copy or circulation notes are not transferred. These copy record fields are text files and cannot be included in the 852 tag.

To automatically launch MARC Magician after the transfer, select the check box before clicking Transfer. The transfer removes the records from the Book Cart.

After editing your records, or creating new ones, in MARC Magician and transferring them to Follett, you can retrieve them in the Book Cart. Click the EZ Retrieve button or select Tools | Book Cart | EZ Retrieve from the menu. The EZ Retrieve dialog appears:



Highlight a description and click Retrieve. Cataloging imports the records into your database and places them back in the Book Cart.



EZ Retrieve from MARC Magician

| Date Created | Description | Records |
|--------------|----------------------------------|---------|
| 9/14/2001 | REF M - R | 288 |
| 9/28/2001 | Juvenile Fiction AAR through LYR | 301 |
| 9/28/2001 | Juvenile Fiction MAC through ZWE | 494 |
| 9/28/2001 | REF A - J | 68 |
| 10/18/2001 | Lot from Smith Elementary | 45 |
| 11/26/2001 | October Acquisitions | 83 |

Retrieve
Delete
Cancel
Help

Click to permanently delete the highlighted group.

Highlight the description in the EZ Retrieve list and click Retrieve. When you retrieve the records, they are added to the Book Cart and imported into your database, replacing the existing records. New records are added.

To delete a transfer group from the EZ Retrieve dialog, highlight the description and click Delete. Close the dialog by clicking Cancel. If you are finished with the records in the Book Cart, click Remove All, then Close.

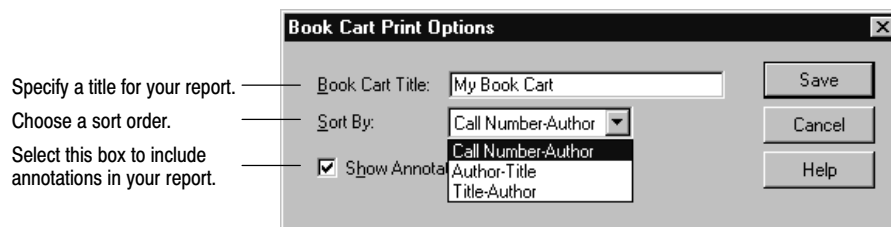
For Union Catalog Plus: Directly transferring records to and from MARC Magician is not available.

Printing the contents of the Book Cart

The Book Cart contents can be printed and the report customized. Prior to printing the report, you can set the print options by going to Tools | Book Cart | Print Options. There you can add a title for the report, set the sort order to Call

Number—Author, Author—Title, or Title—Author, and choose to display annotations (tags 505 _a, 511 _a, or 520 _a).

Tip: To print a list of new items, add titles to the Book Cart by Acquisition Date.



Merging copies onto one title record

Important: If your library is a member of a union using Union Catalog Plus and Data Exchange, merging functionality is not available through the Cataloging module. The Merge and View MARC buttons will not be visible in the Book Cart toolbar. The merging functionality is available in Union Catalog Plus

With the Merge feature, you can move copies from one record to another with the click of a button. Because records you receive from vendors may vary in quality and content, your database may contain several MARC records for the same item. With the Merge feature, you can add all the duplicate MARC records to the Book Cart, select the best one, move all the copy records onto it, and delete the others.

1. Add all the duplicate records to the Book Cart. Either select Tools | Book Cart | Add to Book Cart from Cataloging menu, and add a range of records (see page 346) or add them individually from the main window.
2. Open the Book Cart by selecting Tools | Book Cart | View or click the Book Cart button on the toolbar.
3. Decide on the “best” record to preserve. To help you in selecting the best record, use the Proof Sheet Viewer: Highlight a record and click View MARC. You can also edit a record by double-clicking it or highlighting it and clicking the Edit button.
4. Once you determine the best record, make sure to highlight it, then click Merge. All of the copy records from all of the records in the Book Cart are transferred onto the highlighted record. All transactions including statistics and holds associated with copies being merged will remain intact. The remaining MARC records with no copies are then automatically deleted (regardless of the “Delete Title when last copy deleted” setting in System Setup).

Warning: All deletions are immediate. You cannot cancel the processing once it starts. The data cannot be recovered.

This process leaves your catalog with the one “best” MARC record with all of the copies attached to it. The exception report contains information about each move, each deletion, and any processing errors.

Select the best record.

Click to view the record. The Merge button is available when two or more titles have been added to the Book Cart.

All copies are merged to one MARC record. The call number is taken from the first copy. If a copy isn't available, it's taken from the MARC record.

| Call Number | Title | Author |
|-----------------------|-----------------------|--------------------|
| PB FIC HDW | Return to Howlday Inn | Howe, James, 1946- |
| Return to Howlday Inn | Return to Howlday Inn | How, James, 1946- |
| FIC HDW | Return to Howlday Inn | Howe, James, 1946- |
| FIC HDW | Howlday Inn | Howe, James |
| PB FIC HDW | Return to Howlday Inn | Howe, James, 1946- |
| Return to Howlday Inn | Return to Howlday Inn | How, James, 1946- |
| Return to Howlday Inn | Return to Howlday Inn | How, James, 1946- |
| Return to Howlday Inn | Return to Howlday Inn | How, James, 1946- |
| Return to Howlday Inn | Return to Howlday Inn | How, James, 1946- |

| Call Number | Title | Author |
|-------------|-----------------------|--------------------|
| PB FIC HDW | Return to Howlday Inn | Howe, James, 1946- |

For DX-enabled union catalogs: The application transfers the resultant “best” record to the appropriate members. The participation level and filter rules determine whether or not the record is transferred to a particular member; the DX matching rules determine whether or not the member’s record is actually updated. In any case, the copy information and statistics at the member are preserved. Please note that this process does not move the copies in the member databases, only the union’s.

Chapter 28 Cataloging tips

This chapter briefly covers some common non-book materials that people often catalog. More detailed information on cataloging these materials is available at our Web site at www.fsc.follett.com or from our Marketing department at 1-800-323-3397.

Audiovisual equipment

You may want to create MARC records for audiovisual equipment because you want to track it and also maintain information on it, such as price, date purchased, vendor address, serial number, and bulb type and size. See AACR2R, Chapter 10, for specific cataloging rules for A/V equipment. The chief source of information is the object itself along with accompanying material. You'll find most of the information on the manufacturer's placard or sticker attached to the item. When creating the record, use the template for Three-Dimensional Artifacts, Objects, and fill in as needed. Here are some suggestions:

```
LDR00444nrm 22      a 4500
008      960916s19uu  xx nnn          rneng d
037      _bName and address of manufacturer or vendor
040      _aCataloging source
          _cTranscribing agency
245  00  _aName of item
          _h[realia].
260      _aLocation of manufacturer ;
          _bName of manufacturer,
          _cDate of manufacture.
300      _a# specific name of item ;
          _cDimensions
500      _aGeneral note.
590      _aSerial number.
590      _aOther local note.
650  7  _aTopical subject heading.
          _2sears
710  2  _aCorporate name added entry for manufacturer.
900      _aCall number
```

Tip: Create a copy for each piece of equipment. Then, in the Add Copy dialog, use the three Description/Enumeration fields to record serial, model, or replacement part numbers.

Vertical file material

Librarians worldwide are holding an ongoing Internet discussion on the use and necessity of locally constructed and maintained vertical files because of Internet access for library patrons. Most material in vertical files is available on the Internet at a much more reasonable cost and is updated much more frequently.

With this new source of information, many libraries are giving up their vertical files for all materials except for local, historical, genealogical, and similar types of information. If you still want to catalog your vertical file materials, here are two approaches you can take:

- Option 1: Catalog each physical vertical file cabinet as a separate record, with subject headings for the file folders and title added entry access. Use the Three-Dimensional Artifact, Object template.
- Option 2: Catalog each subject file folder as a separate record, with subject heading access and title added entry access. Use the Serials (Printed Periodical, etc.) template.

You can also create authority records to generate cross-references (SEE and SEE ALSO) to the vertical file to provide even more access to these resources.

These topics are very lengthy and we can't cover all the details here. However, more information is available on our Web site at www.fsc.follett.com.

Videorecordings

It's becoming more and more important to catalog videorecordings, especially so that patrons can search on them through the OPAC. See AACR2R, Chapter 7 for the cataloging specifics. The chief source of information is the title screen(s) or the container or container label. Use the template for Video (Film, Filmstrip, Transparencies), and fill in as needed. Here are some suggestions:

```
LDR1579ngm 22      a 4500
007      Codes for physical description
008      951018s19uu          vlang d
010      _a  LCCN
020      _aISBN ;
          _cPrice
028 00  _aPublisher number
          _bSource
037      _bName and addresses of publisher or distributor
040      _aCataloging source
          _cTranscribing agency
100 1  _aMain entry.
245 10  _aTitle proper
          _h[videorecording] :
          _bsubtitle /
          _ccorporate bodies with their functions first ; persons having
          overall responsibility second (such as producers, directors, and
          writers).
246 3  _aVarying titles
250      _aEdition statement.
260      _aPlace of publication :
          _bPublisher,
          _cDate.
300      _a# [videocassette(s) or videodisc(s)] (# min.):
          _bsd., col. ;
          _cdimensions
          _eguide or other accompanying material.
538      _aFormat. (VHS, Beta, Laser optical, etc.)
500      _aGeneral note.
505 0  _aContents.
508      _aCredits -- photographer/camera/cinematographer ; animator ;
          artist/illustrator/graphics ; (film/photo) editor ; music ;
          consultant/advisor. (disregard: assistant/associate producers,
          supervisors/coordinators, project/executive editors, technical
          minor or purely technical contributors)
511 0  _aCast names.
```

```

521    _aAudience note.
520    _aSummary note.
546    _aLanguage note.
600 17 _aPersonal or family name subject heading.
      _2sears
610 27 _aCorporate name subject heading.
      _2sears
611 27 _aMeeting name subject heading.
      _2sears
630 07 _aUniform title subject heading.
      _2sears
650 7  _aTopical subject heading.
      _2sears
651 7  _aGeographical name subject heading.
      _2sears
700 1  _aAdded entry -- personal name.
710 2  _aAdded entry -- corporate name.
711 2  _aAdded entry -- meeting name.
730 0  _aAdded entry -- uniform title.
740 02 _aUncontrolled related/analytical title.
900    _aCall number

```

Electronic resources

The rapid expansion of the Internet, along with the introduction of eBooks (electronic books) and eJournals, has resulted in a vast number of electronic resources available to the library patron. To identify and access these resources, you can create MARC records that contain information about, linking entries for, and direct access to, these electronic resources. To enable this access, the Library of Congress has added or changed several field (tag) definitions in its guidelines for cataloging. If your library is networked or Internet-enabled, the 856 tag can provide a direct hyperlink to many of these resources.

In the following sections, you'll find general guidelines for the 856 tag and information on some of the cataloging options available to you. Following that, you'll find system requirements and considerations. You'll also find guidelines for adding links to related (or additional) materials to a record and for cataloging specific electronic resources, such as eBooks and Web sites.

Each section includes information on many of the necessary tags and examples of completed MARC records.

Note: Because of the evolving nature of electronic resources and the ongoing changes in cataloging them, this information may become outdated. For the latest information, please see the sources listed on page 369.

Tag 856—Electronic Location and Access

The 856 tag, Electronic Location and Access, has been assigned by the Library of Congress to identify and locate electronic resources from within a MARC record. You can use the 856 tag to provide access to related material, such as a Web page about an author or an image file on your network that contains pictures of the subject of the book. The 856 tag can also provide direct access to the item described in the MARC record (e.g., an eBook or Web site) or to an electronic *version* of the cataloged item.

The large number of subfields defined for the 856 tag make it seem more complicated than it is. Although there are many subfields available, only a few are required to enable access.

Cataloging tips for the 856 tag — Electronic Location and Access (R)

| Essential components | Cataloging guidelines |
|---|---|
| Indicator 1 Access method 4 HTTP | To create an active link for this tag in the OPACs, Cataloging (OPAC Display only), and WebCollection Plus, set the first indicator to 4 . |
| Indicator 2 Relationship to source 0 Resource 1 Version of resource 2 Related to resource | If the main entry of the record is an electronic resource (e.g., an eBook or Web site), and the 856 tag provides access to it, enter a 0 . If the 856 tag is a link to an <i>electronic version</i> of the physical item in the main entry, enter a 1 . If the 856 tag is a link to <i>related</i> Web sites or files, enter a 2 . |
| Subfields _u Uniform Resource Locator (NR) | Enter the complete URL, including the access method (e.g., http, file, mailto). Unless you also enter a subfield z , this subfield displays in the OPACs, Cataloging (OPAC Display only), and WebCollection Plus. |
| _z Public note (R) | Enter a user-friendly link that displays in the OPACs, Cataloging (OPAC Display only), and WebCollection Plus. If the 856 tag contains a _z , only the contents of _z are displayed. Otherwise, the URL in _u displays. |
| _3 Materials specified (NR) | If the electronic resource is a subset of, or an addition to, the MARC record's main entry, use this subfield to describe the materials in the electronic resource. Examples: Table of contents Part I |

Note: If a tag or subfield can occur more than once, it is marked (R) for repeatable. If a tag or subfield indicates (NR), it can only occur once per record or tag, respectively.

Example: A bibliographic record for *Moby Dick* has the following main entry:

```
245 10 _aMoby Dick, or, The whale /
      _cHerman Melville ; illustrated by Rockwell Kent.
```

This record might *also* include an 856 tag for the electronic version of the book:

```
856 41 _uhttp://www.melville.org/download.htm
      _zClick here to read the book!
```

An 856 tag for a Web site with related information:

```
856 42 _uhttp://www.robinsonresearch.com/literate/authors/Melville.htm
      _zBiographical data on Herman Melville
```

An 856 tag for a local file containing images and facts on whaling:

```
856 42 _ufile://myserver/hypertext_files/whaling.htm
      _zWhaling facts and images
```

Or an 856 tag for sending email messages:

```
856 42 _umailto:librarian@myschool.edu
      _zSend your comments on this book to your librarian!
```

See also: For more information on adding tags to MARC records, see page 266.

Cataloging local electronic resources

Not all electronic resources are on the Internet. You can use the 856 tag to access electronic resources that are stored on your local library or school network. For example, you can provide access to locally created or collected files (much like a vertical file), and eBooks and graphics can be downloaded and stored locally.

There are two different protocols that you can use to access local resources:

- **HTTP:** If you have a Web server and an Internet connection, you can access local files through a *virtual* directory. A virtual directory, or “alias,” is an artificial directory that you create through your Web server software. This subdirectory links your Web server to a specific directory on your network. Once you create the alias, you can use this path in the 856 tag.

Example: To let your patrons access the TIGER.AVI file, stored on your library server at “g:/media/ref_lib1/wildlife/vids/” create an alias in your Web server software called “animalvideos” and point it to the “vids” directory. The URL (u) would appear as follows:

```
856 42 _3avi file
      _uhttp://www.myschool.edu/animalvideos/tiger.avi
      _zA tiger video clip
```

- **FILE:** If you don’t have a Web server and want to store electronic resources on your library server, you must use UNC pathing to identify the shared drive and the file scheme as the access method.

Example: To create a link to the TIGER.AVI file stored on your library server, include the name of the server and drive in the path. In the following 856 tag, the library server is called “lib_serv” and the shared drive is “media”. Remember to create a share for that particular drive.

```
856 42 _3avi file
      _ufile://lib_serv/media/ref_lib1/wildlife/vids/tiger.avi
      _zA tiger video clip
```

Important: WebCollection Plus can *only* access electronic resources through your Web server. Electronic resources that use the file protocol are displayed in WebCollection Plus but are not hyperlinked.

System notes and considerations

To take advantage of electronic resources, search stations and workstations need to have the appropriate software to access and to view these resources.

In addition to an Internet connection and Web browser, each search station may need some other remote access applications or services. For example, to send an email, the station must have an email account and application; other protocols, such as ftp and file, are supported by most *current* browsers.

Search stations may also need a word processor, multimedia player, or an eBook reader to use the resources. Operating systems often include many of these programs; others must be purchased or downloaded from the Internet.

Note: WebCollection Plus can *only* access electronic resources through a Web server. Electronic resources that use the file protocol are displayed in WebCollection Plus but are not hyperlinked.

Cataloging electronic resources, especially Web sites, can be a time-consuming task. Here's a list of questions to ask before investing your time:

- Audience: Will your patrons use this resource?
- Stability: If the 856 tag connects to a Web site, how confident are you that the site will exist tomorrow?
- Validity: Who will determine if a Web site is appropriate for your patrons and what are the implications of providing this information?
- Accuracy: How often will you verify that a site still exists and is still valid? Who will do this?
- Time: How much time can be allotted to creating and maintaining these references?

Note: Follett Software Company's WebPath Express service can provide you and your patrons with maintenance-free access to thousands of high-quality Web sites. For more information, please contact Customer Service or see our Web site at <http://www.fsc.follett.com>.

Related materials

The 856 tag can direct patrons to electronic resources *related* to the item described in the MARC record. Just add an 856 tag with a second indicator of 2.

Example: A print book with references to related electronic files:

```
245 10 _aMoby Dick, or, The whale /
      _cHerman Melville ; illustrated by Rockwell Kent.
. . .
856 42 _uhttp://www.robinsonresearch.com/literate/authors/Melville.htm
      _zBiographical data on Herman Melville

856 42 _uhttp://www.melville.org/corresp.htm
      _zMelville's Letters to Hawthorne

856 42 _uhttp://www.kwm.org/
      _zKendall Whaling Museum Online

856 42 _uhttp://www.whalesci.org/
      _zThe Institute of Cetacean Research home page

856 42 _ufile://myserver/hypertext files/whaling.htm
      _zWhaling facts and images
      _2file
```

Using "virtual" 856 tags

Perhaps you've found an educational Web site about polar bears. Wouldn't it be nice if you could add a *single* 856 tag and have it appear in *every* bibliographic record about polar bears? If you use authority records and have good subject headings in your bibliographic records, you can.

Authority records can be used to create "virtual" 856 tags in the OPACs, Cataloging (OPAC Display only), and WebCollection Plus. This means that if you add an 856 tag to an authority record, you can *display* the contents of that tag with every *related* bibliographic record.

Note: To enable this feature, you must select the Show Authority 856 tags in OPAC option from System Setup's Cataloging Misc tab (see page 55).

If an authority record and related bibliographic records contain identical 856 tags, both links appear in the applications. You may want to delete duplicate bibliographic 856 tags to ease future maintenance. To globally delete these tags, see page 334.

To be related, a bibliographic record must contain a subject heading (6xx tag) that matches the authority record's main entry (1xx tag). The contents of the *indexed* subfields in the tags must be identical, excluding capitalization and punctuation.

Example: To see how the applications determine whether or not a bibliographic record matches an authority record, imagine that you've added the following authority record to your database:

```
150      _aPolar bears.
856 42  _uhttp://www.seaworld.org/polar_bears/pbindex.html
        _zFacts about polar bears
```

The following bibliographic record matches because the 650 *_2 isn't* indexed:

```
245 10  _aWorld of the polar bear /
        _cFred Bruemmer.
.
.
.
650   1  _aPolar bears.
        _2sears
```

This bibliographic record doesn't match because the 650 *_x is* indexed:

```
245 10  _aLittle polar bear and the brave little hare /
        _cby Hans de Beer ; translated by J. Alison James.
.
.
.
650   7  _aPolar bears
        _xFiction.
```

Tip: You could make the previous record match by adding a new subject heading based on the authority record (see "Using the Find Headings feature" on page 276).

See also: To see a list of the indexed subfields for a particular tag, refer to the tables in Appendix B, "Bibliographic and authority tags."

Of course, you *won't* want to use authority records to catalog all of your electronic resources. As a rule, we recommend that you use authority 856 tags for related resources only. If the electronic resource is a copy of the main entry, or is the main entry, add the 856 tag to the *bibliographic* record.

Note: If you would like to use "virtual" 856 tags, but aren't using authority records, Follett Software's authority record service can provide the authority headings you need. For more information, please contact Customer Service or see our Web site at <http://www.fsc.follett.com>.

eBooks

eBooks are electronic versions of printed books. The actual file containing the text can reside on a floppy disk, the hard drive of a workstation, your library server, or out on the Internet.

You can either include information about an electronic version in a print-version record, or create a separate record for the electronic version. If you create a separate record, you can take advantage of the new material-type icons for eBooks. When the following tags have the correct information, the eBook icon appears in the hitlist, and you can limit searches to eBooks in the OPAC.



Generic
eBook icon

- Position 06 of the Leader (000 tag), which is Record type, must be **a = language material**. If you select the Book (Monograph) template in Cataloging, the Leader is correct.
- Position 23 of the 008 tag, which is Form of item, must be **s = electronic**. You can edit this position by placing the cursor in the subfield, selecting Tag/Edit 008 tag from the menu, clicking the Book-specific button, and selecting **s** in the list box next to Form of item (23).

Note: If you are using the Easy Editor, just select **eBook** from the Material Type list on the Identification tab.



netLibrary
eBook icon

- For netLibrary eBooks, in addition to the above two settings, the netLibrary URL must be in subfield u of the 856 tag. If you receive netLibrary MARC records from FLR, they will have the appropriate information.

You must also have the correct software to view eBooks. Some require a proprietary reader, like Gemstar REBs or Glassbooks. Others need just a word processor or Adobe Acrobat (available on our installation CD). You can read many eBooks (like netLibrary's) that reside on Web sites with just the browser.

Single-record method

If you have print and electronic versions of the same item, they do not need separate MARC records. One item is the primary item of the record, and one, the secondary. In this table, the print version is primary, and the electronic version, secondary. If you already have a MARC record for the print version, add the following tags when adding an electronic version to your collection:

| | |
|-------------------------------|--|
| 007 | Physical Description Fixed Field (R) |
| Position 00 | Using the menu or toolbar button, insert a 007 tag. Select c = computer file from the list. |
| Category | |
| Position 01 | Select r = remote for an Internet or network resource, or another code that's appropriate for the carrier. |
| Specific Material Designation | |
| Position 02 | Leave blank. |
| Positions 03–05 | Select as appropriate. |
| 020 | ISBN (R) |
| | Add another 020 and enter the electronic book's ISBN. You can add (electronic bk.) after the number. |
| 530 | Additional Physical Form Available Note (R) |
| | Contains the information about the electronic version: |
| _a | Enter an introductory phrase. Example: Also available as an electronic reproduction. |
| _b | Enter the vendor information. Example: netLibrary, Inc., Boulder, Colo. |
| _c | Enter any availability conditions. Example: Requires an eBook device. |
| 740 | Added Entry --Uncontrolled Related/Analytical Title (R) |
| | Enter the title of the electronic book if it differs from the print version's title in the 245 tag. |
| 856 | Electronic Location and Access (R) |
| | Use a second indicator of 1 and enter the URL in _u. |

Example: You have several copies of Cooper's *The Deerslayer* in print and have just acquired an eBook copy of the same publication. In this example, the print version is primary; the electronic is secondary. The tag additions are bolded in this example:

```
LDR      cam a
007      cr cnu
008      870324s1987    nyuaf          s000 1 eng
010      _a 87009928
020      _a0873953614
020      _a0873957903 (pbk.)
020      _a0123456789 (electronic bk.)
040      _aDLC
         _cDLC
100      1  _aCooper, James Fenimore,
         _d1789-1851.
245      14 _aThe deerslayer, or, The first war-path /
         _cJames Fenimore Cooper ; historical introduction and explanatory
         notes by James Franklin Beard ; text established by Lance
         Schachterle, Kent Ljungquist, and James Kilby.
260      _aAlbany :
```

```

        _bState University of New York Press,
        _cc1987.
300    _alviii, 682 p., [16] p. of plates :
        _bill. ;
        _c24 cm.
490 1  _aThe writings of James Fenimore Cooper
530    _aAlso available as an electronic reproduction;
        _bScanitall, Inc., Chicago, Ill.
650 0  _aBumppo, Natty (Fictitious character)
        _xFiction.
650 0  _aFrontier and pioneer life
        _zNew York (State)
        _xFiction.
650 0  _aDelaware Indians
        _xFiction.
650 0  _aIroquois Indians
        _xFiction.
651 7  _aUnited States
        _xHistory
        _yFrench and Indian War, 1755-1763
        _xFiction.
655 7  _aWar stories.
        _2gsafd
655 7  _aHistorical fiction.
        _2gsafd
700 1  _aBeard, James Franklin,
        _d1919-
740 01 _aFirst war-path.
800 1  _aCooper, James Fenimore,
        _d1789-1851.
        _tWorks.
        _f1980.
856 41 _uhttp://www.scanitall.com/lit/cooper/drslr.html
        _zClick here to read the eBook
900    _a813.2 Co

```

Multiple-record method

If you are creating a MARC record specifically *for* an electronic book, create or obtain the record for the print version. Then, add the tags in the following table:

| | | |
|-----------------|---|--|
| 000 | Leader | |
| | | <p>For this tag to contain the correct information, select the appropriate Bibliographic Material Type template for the item you are cataloging. For an eBook, choose Book (Monograph).</p> <p>If you are editing an existing print-version record, make sure that the Record Type (position 06) is a=language material. Change any other positions as needed.</p> <p>Select Computer File <i>only</i> for the following:</p> <ul style="list-style-type: none"> • Computer software • Numeric data • Computer-oriented multimedia • Online systems or services |
| 007 | Physical Description Fixed Field (R) | |
| | | Using the menu or toolbar button, insert a 007 tag. |
| Position 00 | Category | Select c = computer file from the list. |
| Position 01 | Specific Material Designation | Select r = remote for an Internet or network resource; or use another code that's appropriate for the carrier (i.e., magnetic disk, cartridge). |
| Position 02 | | Leave blank. |
| Positions 03-05 | | Select as appropriate. |
| 008 | Fixed-Length Data Elements (NR) | |
| Position 23 | Form of item | Place the cursor in the 008 tag, and click Tag/Edit 008 tag on the menu. Click on the Book Specific (18-34) button. Click the Form of item (23) list and select s = electronic . Change any other positions as needed. |
| | | Note: The choice, s = electronic , is only available for the book material type. For other types, use the default entry for Form of item. |
| 020 | ISBN (R) | |
| | | Move the print version's ISBN to a 534_z. |
| _a | | Enter the eBook ISBN. You can add (electronic bk.) after it. |
| 245 | Title (NR) | |
| _h | Medium | Add a subfield _h after the _a and enter [electronic resource]. Move the punctuation from the end of the _a to the end of the _h. |
| 256 | Type and extent of resource (NR) | |
| | | Both indicators are undefined. |
| _a | | Enter Electronic data . |
| 500 | Source of Title Proper (R) | |
| | | Both indicators are undefined. Enter the source of the title. |
| _a | | Example: Title from main page (viewed on 2/2/02). |

| | |
|------------|--|
| 506 | Restrictions on Access Note (R) |
| | Both indicators are undefined. Use if applicable. Example: Restricted to account members having a user id and password. |
| 533 | Reproduction Note (R) |
| | Both indicators are undefined. Contains the information about the electronic version when it differs from that of the item being cataloged. |
| _a | Enter the form. Example: Electronic reproduction. |
| _b | Enter the place of reproduction. Example: Boulder, Colorado: |
| _c | Enter the agency that reproduced the item. Example: netLibrary, |
| _d | Enter the date of reproduction. |
| _f | Enter a series statement of the reproduction, if applicable. |
| _n | Enter a note, if applicable. Note: You can add a 530 tag, Also available as an electronic reproduction , to a print-version MARC record, if applicable. |
| 534 | Original Version Note (R) |
| | Both indicators are undefined. |
| _z | Enter the ISBN of the print version (from the 020 tag). |
| 538 | Mode of Access Note (R) |
| | Both indicators are undefined. |
| _a | Enter the mode of access. Examples: Mode of access: World Wide Web. Access through local school network. |
| 538 | System Details Note (R) |
| | Both indicators are undefined. This tag is needed only when access to the electronic book requires special hardware or software. Example: System Requirements: SoftBook Reader. |
| 856 | Electronic Location and Access (R) |
| | Use a second indicator of 0. Use first indicator and subfields as outlined in the previous section. |

See also: For more information on adding tags to MARC records, see page 266.

Example: An eBook record for *The Deerslayer*:

```
LDR      cam a
007      cr cnu
008      000627r19872000couabf s s000 1 eng
010      _a 87009928 //r943
020      _a058507710X (electronic bk.)
040      _aDLC
         _cDLC
100 1    _aCooper, James Fenimore,
```

```

    _d1789-1851.
245 14 _aThe deerslayer, or, The first war-path
      _h[electronic resource] :
      _cJames Fenimore Cooper ; historical introduction and explanatory
        notes by James Franklin Beard ; text established by Lance
        Schachterle, Kent Ljungquist, and James Kilby.
256  _aElectronic data.
260  _aAlbany :
      _bState University of New York Press,
      _ccl1987.
300  _alviii, 682 p., [16] p. of plates :
      _bill. ;
      _c24 cm.
490 1  _aThe writings of James Fenimore Cooper
500  _aTitle from title frame.
506  _aRestricted to library patrons having a password.
533  _aElectronic reproduction.
      _bBoulder, Colo.:
      _cnetLibrary,
      _d1999.
534  _z0873953614
534  _z0873957903 (pbk.)
538  _aMode of Access: Internet.
650 0  _aBumppo, Natty (Fictitious character)
      _xFiction.
650 0  _aFrontier and pioneer life
      _zNew York (State)
      _xFiction.
650 0  _aDelaware Indians
      _xFiction.
650 0  _aIroquois Indians
      _xFiction.
651 7  _aUnited States
      _XHistory
      _yFrench and Indian War, 1755-1763
      _xFiction.
655 7  _aWar stories.
      _2gsafd
655 7  _aHistorical fiction.
      _2gsafd
700 1  _aBeard, James Franklin,
      _d1919-
740 01 _aFirst war-path.
800 1  _aCooper, James Fenimore,
      _d1789-1851.
      _tWorks.
      _f1980.
856 40 _uhttp://www.netlibrary.com/summary.asp?ID=7515
      _znetLibrary's eBook
900  _a813.2 Co

```

You can also add MARC records for eBooks in the Easy Editor. Fill out the text boxes as you would for a print book. Make sure to do the following: select eBook from the Material Type list on the Identification tab; enter the URL and, optionally, a public note on the Description tab.

Copies: Direct or remote access?

Direct access is the term used for electronic resources residing on a tangible carrier (e.g., floppy disk, CD-ROM, cartridge) on your shelf. For these items, add a copy in the Copy Editor instead of using the 856 tag. The copy (holdings) information would be similar to that of a print version of the item — call number, barcode, circulation type, price, etc. You can then circulate and inventory the disk. Make sure that position 01 of tag 007 indicates the carrier type.

Remote access is the term used for resources residing in a file on a computer, either on your own network or out on the Internet. For these items, the “copy information” is the location of the file entered in the 856 tag. If you want to record

additional information, such as price, category, or acquisition date, you can add a copy in the Copy Editor. The netLibrary MARC records from FLR do contain copy information.

Note: There is a default circulation type of Non-circulating eBook (*NC) to use for non-physical copies. If you assign this circulation type, you cannot circulate the copies. They cannot be placed on hold, and always have an inventory status of Marked; in the OPACs, they are always listed as In.

See also: For more information on circulation types, see page 45 in System Setup.

Web sites

You can provide appropriate Internet information to patrons by creating a MARC record for a Web page. Follow the guidelines in the previous eBooks section. Use either the Book (Monograph) template, changing position 23 of the 008 tag to **s = electronic**, or the Computer File template. Then, add subject headings and notes to provide subject and keyword access to the Internet addresses most used by your patrons. Through the software's links to these sites, patrons can access the sites directly via the 856 tag displayed in OPAC.

The chief source of information is the resource itself. You can take the information from any formally presented evidence, such as the home page or title screen, main menus, encoded metadata, and program statements.

Examples:

The Dilbert home page on the World Wide Web:

```
LDR      nam a
001      fsc00009657
005      19960926155126.0
007      cr cnu
008      000613p1998    xxua    s      000 c eng d
245  00  _aDilbert
         _h[electronic resource] :
         _bhome page.
256      _aElectronic data.
260      _a[S.l.] :
         _bUnited Feature Syndicate,
         _cc1998.
500      _aTitle from home page (viewed on August 22, 2002).
538      _aMode of access: World Wide Web.
600  17  _aAdams, Scott,
         _d1957-
         _tDilbert
         _xElectronic programs.
         _2sears
650   7  _aDilbert (Fictitious character)
         _xCartoons and caricatures
         _xElectronic programs.
         _2sears
650   7  _aComic books, strips, etc.
         _xElectronic programs.
         _2sears
655   7  _aWeb sites.
         _2lcsh
690      _aInternet address.
856  40  _uhttp://www.unitedmedia.com/comics/dilbert
```

A document available on the Web:

```
Ldr      nam a
007      cr cnu
008      000629s1999    xxuab s      000 0 eng d
245 00  _aCalifornia Condor Restoration
        _h[electronic resource].
256      _aElectronic data.
260      _a[S.l.] :
        _bPeregrine fund,
        _cc1999.
500      _aTitle from title page (contents viewed May 4, 2000).
538      _aMode of access: Internet.
650 0  _aCalifornia condor.
650 0  _aEndangered species
        _xUnited States.
650 7  _aCondors.
        _2sears
856 40  _uhttp://www.peregrinefund.org/conserv_cacondor.html
        _zPeregrine Fund's Web page on California condors
```

300 tag — Physical Description

Because there is no physical description for a Web page, there is no entry for the 300 tag. By default, the Cataloging module requires this tag to exist. However, you can edit the Book (Monograph) template so that the 300 tag is *not* required. See Appendix C, “Bibliographic and authority templates,” for instructions on editing templates.

Note: Bibliographic and authority templates cannot be modified on Mac OS.

Computer files

According to current guidelines, the material type Computer File should only be used for the following:

- Computer software (including programs, games, and fonts)
- Numeric data
- Computer-oriented multimedia
- Online systems and services

All other electronic items are cataloged based on their most significant aspect. For example, eBooks and Web pages are cataloged as Books (Monographs). See the previous sections and the sources listed on page 369 for guidelines.

Select the Computer file template, enter the content tags, and the following ones:

| | |
|-------------------------------|--|
| 007 | Physical Description Fixed Field (R) |
| Position 00 | Using the menu or toolbar button, insert a 007 tag. Select c = computer file from the list. |
| Category | |
| Position 01 | Select a code that's appropriate for the carrier (e.g., magnetic disk, tape). |
| Specific Material Designation | |
| Position 02 | Leave blank. |
| Positions 03-05 | Select as appropriate. |
| 245 | Title (NR) |
| _h | Add a subfield _h after the _a and enter [electronic resource] . |
| Medium | Move the punctuation from the end of the _a to the end of the _h. |
| 256 | Type and extent of resource (NR) |
| | Both indicators are undefined. |
| _a | Enter Electronic data or Electronic program . |
| 300 | Physical Description (R) |
| | Enter the description of the carrier. |
| 500 | Source of Title Proper (R) |
| | Both indicators are undefined. |
| _a | Enter the source of the title. Example: Title from label. |
| 506 | Restrictions on Access Note (R) |
| | Both indicators are undefined. |
| | Use if applicable. |
| 538 | System Details Note (R) |
| | Both indicators are undefined. |
| _a | This tag is needed only when use of the item requires special hardware or software. Example: System Requirements: Requires a PC with Windows 95 O/S. |

See also: For more information on adding tags to MARC records, see page 266.

Example: A network operating system disc.

```
LDR      nmm a
007      co ng
008      990916p19981993utu    g    b          eng d
037      _bNovell, Inc., 1555 N. Technology Way, Orem, UT, 84057
040      _aIMchF-TS
          _cIMchF-TS
245 00   _NetWare 5
          _h[electronic resource] :
          _boperating system /
```



```

        _cNovell.
256    _aComputer operating system program.
260    _aOrem, Ut. :
        _bNovell,
        _c1998, c1993.
300    _a1 CD-ROM ;
        _c4 3/4 in.
538    _aSystem requirements: Server-class PC with Pentium processor,
        CD-ROM drive.
500    _aTitle from label.
520    _aNetwork operating system.
630 00 _aNetWare (Computer file)
630 07 _aNetWare (Computer file)
        _2sears
650 7  _aComputer networks
        _xSoftware.
650 0  _aLocal area networks (Computer networks)
650 0  _aOperating systems (Computers)
710 2  _aNovell, Inc.
856 42 _uhttp://www.support.novell.com
        _zWeb site for technical support

```

For further information

The information in this section has been extracted from the guidelines of the LOC, OCLC, and ISBD(ER). Because of the evolving nature of electronic resources, and, thus, their cataloging needs, the guidelines are subject to change. For more complete information, consult the cataloging materials at the following Web sites or their printed publications, and those of AACR2.

Library of Congress:

- <http://www.loc.gov/marc/856guide.html>
- <http://www.loc.gov/marc/holdings/echdloca.html>
- http://www.loc.gov/catdir/cpso/dcmb19_4.html

Online Computer Library Center:

- <http://www.oclc.org>

International Standard Bibliographic Description for Electronic Resources:

- <http://www.ifla.org/VII/s13/pubs/isbd2.htm>

See also: For more detailed instructions on adding and editing tags, subfields, and indicators in the MARC editor, see Chapter 23, “Using the MARC Editor,” which starts on page 263.

Notes

Chapter 29 Acquisitions

Acquisitions

Orders

Located within the Cataloging module, Acquisitions lets you create orders for purchasing items for your collection. When creating an order, you can access the Funding Source and Vendor lists so that you can add either to an order. Various “Find by” searches allow you to retrieve information on existing orders, no matter what their status. From the Copy Editor in Cataloging you can attach vendor and funding source information to copies.

When adding a line item to a new order, you have the option of searching for titles already in your database and moving the existing copy information to the order. This lets you order replacements for worn out copies easily and quickly.

First, you’ll need to set up your Acquisitions information in System Setup. This includes vendors, funding sources, and bill-to/ship-to information. See Chapter 4, “Setting up Acquisitions, that begins on page 61.

Open Acquisitions by selecting it from the Cataloging menu bar.

The life-cycle of an order

Acquisitions order statuses allow you to keep track of an order throughout its life cycle. An order status gives you a quick assessment of an order:

| Order | Order status in Acquisitions |
|----------------------------------|---|
| Order is placed | Order Status: Opened Line Items: Pending |
| Order is issued (sent to vendor) | Order Status: Issued Line Items: Pending |
| Order is received | Order Status: Closed Line Items: Complete (all line items either are Received or Canceled) |

Adding or editing an order

The on-screen dialog for adding or editing orders is the same. To create a new order, click New from the Acquisitions Orders dialog in Cataloging. To retrieve an existing order, search for it (see page 375), highlight it, and click Edit.

Filling out an order

To create a new order, complete the information on the four tabs on the Add Order dialog. The first tab contains general order information:

- The Order Number is provided by the application and displays the current available order number upon opening the window. You can accept or edit this number.
- Select a vendor by clicking Select. If the vendor is not on the list, you can add one by clicking New from the Select Vendor window.
- The Contact Person information is taken from the information you added on the System Setup | Setup | Acquisitions | Defaults tab. You can accept or edit this information.
- The order Status defaults to Opened. Other choices are Issued and Closed. Changing the status to Issued sets the Issued date to the current date. You can change the order status to Closed only if all the line items have been either received or canceled.

Note: An order may be closed only after it has been issued. Changing the order status affects the Funding Sources allocated and spent amounts.

- The Opened date defaults to the current date.
- Checking the Send electronic catalog records on disk check box prints the message, "Please send electronic catalog records with this order," on your order form.

Calculating amounts

The Amount tab is used to calculate additional monetary amounts associated with an order. You can enter shipping charges, a discount amount, and your estimated tax. Or, if you know your tax rate, the tax can be calculated accurately by entering a tax percentage and clicking Compute Tax. A default tax rate can be entered in System Setup, but remains editable.

| Order | Amount | Address | Notes |
|--------------------|---------|-------------------------------|--|
| Subtotal: | \$55.00 | 2 line item(s) for this order | |
| Discount: | \$0.00 | | |
| Estimated Tax: | \$0.00 | Tax Rate: | 0.00% <input type="button" value="Compute Tax"/> |
| Shipping and Misc: | \$0.00 | | |
| Total | \$55.00 | | |

Billing and shipping addresses

The Address tab contains the information you added in System Setup. If selected in System Setup, the Same as Bill To check box is selected here by default. To change the Ship-to address, clear the check box and enter a new address. The address information will be part of your printed order.

| Order | Amount | Address | Notes |
|---|--------|---|-------|
| <input type="button" value="Bill To..."/> | | <input type="button" value="Ship To..."/> <input checked="" type="checkbox"/> Same as Bill To | |
| David Ramos 1793 New Bridge Road McHenry, Illinois 60050 USA | | David Ramos 1793 New Bridge Road McHenry, Illinois 60050 USA | |

Notes for and about an order

Use the Notes tab to enter any special instructions that will appear on the printed order and any internal notes that you want stored with the order but not printed on the order form.

| Order | Amount | Address | Notes |
|--|--------|----------------------|-------|
| Special Instructions to print on order | | Internal Notes | |
| <input type="text"/> | | <input type="text"/> | |

Adding a line item

Clicking Add or Edit in the Line Items box on the Edit Order dialog lets you add or edit individual line items for your order on the Add or Edit Line Item dialog:

1. Enter title information for a new title. Or, if the title is in your database, click Find title, enter a search term and click Find. The fields under Title Details are then filled in with information taken from your MARC record. This way you can easily reorder a title previously cataloged.
2. Select a Funding Source. If the source is not on the list, you can add it by clicking New from the Select Funding Source dialog.
3. The Status defaults to Pending, but you can change it to Complete or Canceled. You can cancel a line item only if the Received box displays a zero.
4. Enter the amounts for Quantity, Unit Cost, and Received (once issued).
5. Use the Notes tab to enter additional details pertaining to a line item that are to be printed on the order form, or that you want to save. Remember, internal notes do not appear on the printed order.

New amount totals appear once you have clicked Save.

Finding an order

There are several ways you can find an existing order: order number (default), vendor, order status, opened date, issued date, and closed date.

1. To use the Find by options, choose one of the Find by methods from the list.

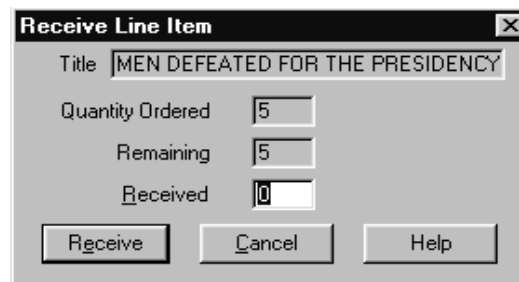
2. The fields that appear below the Find by list vary depending on what you choose from the list:

- Order Number – Starting/Ending number
- Vendor – highlight and click Select on the Select Vendor dialog
- Order Status – choose Open, Issued, or Closed
- Opened Date – Starting/Ending date range
- Issued Date – Starting/Ending date range
- Closed Date – Starting/Ending date range

Once selected, any of these Find by methods opens an Edit Order dialog:

Receive and Receive All buttons

At the bottom of the Line Items dialog are two receiving buttons. These buttons are inactive until you have an Issued order. Once active, you can use these buttons to update either the status of either individual line items by clicking Receive or a whole order by clicking Receive All.



What if an item is unavailable?

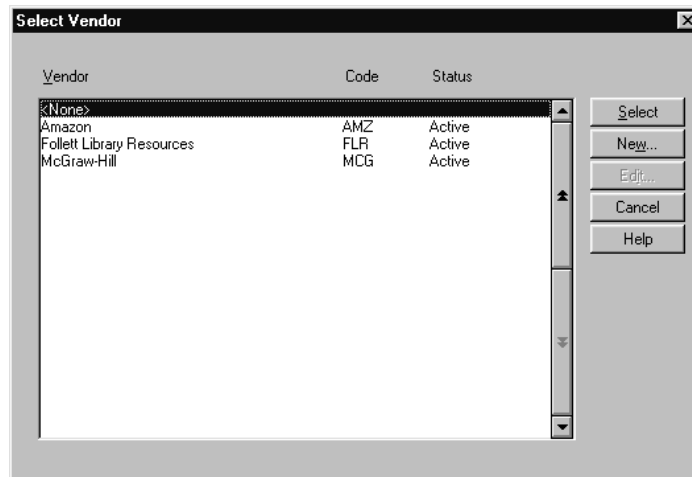
You cannot edit the quantity ordered or delete an item unless the order status is changed back to Open. Under normal circumstances, the order should remain Issued until all items are received. We recommend marking line items that are unavailable as Complete rather than trying to remove them from the order. For example, if you ordered five items but you will be receiving only two, change the Received number to 2 and change the line item Status to Complete. Once all the line items are Complete, you can edit the order, giving it a status of Closed.

If you make a mistake on an order, you may delete it if you first delete all the line items. The system will treat this as if the order and line items never existed with regard to available funds and vendor purchase totals.

Editing vendor information

To edit the vendor list, click the Select button that appears next to a vendor description. The Select Vendor dialog opens. Use the Edit button to open the Edit

Vendor dialog. Notice that these are the same dialogs you used to establish this information in System Setup.

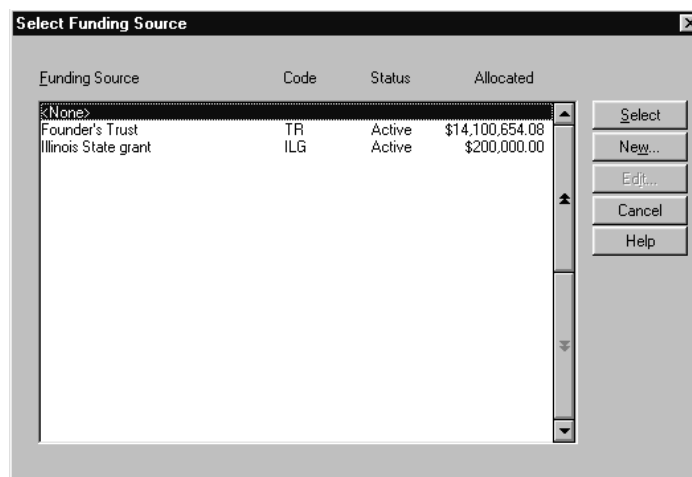


Update vendor information and click Save. For help, see Chapter 4, “Setting up Acquisitions.”

Important: If you add or edit vendor information from an Orders dialog in Acquisitions, you must click Save on *both* the Add/Edit Vendor dialog and the Order dialog for the changes to be saved.

Editing funding source information

To edit a funding source, click the Select button that appears next to a Funding Source description on an Add or Edit Line Item dialog. The Select Funding Source window opens. Use the Edit button to open the Edit Funding Source window. Notice that these are the same windows you used to establish this information in System Setup.

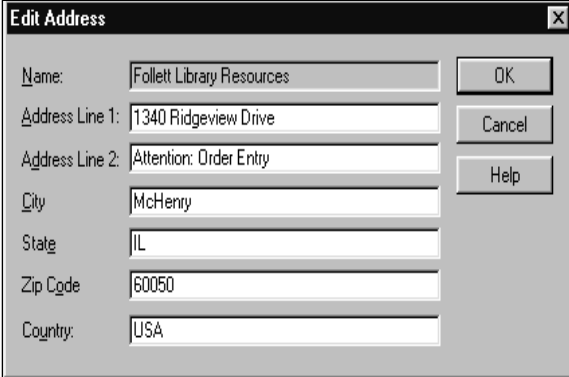


Update the funding source information and click Save. For help, see Chapter 4, “Setting up Acquisitions.”

Important: If you add or edit funding source information from an Orders dialog in Acquisitions, you must click Save on *both* the Add/Edit Funding Source dialog and the Order dialog for the changes to be saved.

Updating address information

To open the Edit Address dialog, click the Bill To or Ship To button (on the Address tab in the Add/Edit Order dialog), or the Address button (on the Add/Edit Vendor dialog) :



The screenshot shows a dialog box titled "Edit Address" with a close button (X) in the top right corner. The dialog contains several text input fields and three buttons. The fields are labeled as follows:

- Name: Follett Library Resources
- Address Line 1: 1340 Ridgeview Drive
- Address Line 2: Attention: Order Entry
- City: McHenry
- State: IL
- Zip Code: 60050
- Country: USA

On the right side of the dialog, there are three buttons: "OK", "Cancel", and "Help".

Update the information for either the vendor or school contact and click OK.

Printing your order form

Once you have completed the order, clicking Print sends the information to your printer formatted like a book order. This is an example of a printed order:

| ORDER | | Page 1 |
|---|--|--------|
| Vendor: | Follett Library Resources 1340 Ridgeview Drive McHenry, IL 60050 | |
| Attention: | Order Entry | |
| Phone: | 888-511-5114 | |
| Issued Date: | 11/01/2001 | |
| Account Number: | SKYVW244 | |
| Order Number: | 4 | |
| Tax Exempt ID: | | |
| Bill To: | David Ramos 1793 New Bridge Road McHenry, IL 60050 USA | |
| Ship To: | David Ramos 1793 New Bridge Road McHenry, IL 60050 USA | |
| Contact: | David Ramos dramos@skyview.edu 815-555-1001 815-555-8774 | |
| ***** Special Instructions ***** | | |
| Please send electronic catalog records with this order. | | |
| ***** | | |

| Item Number | | Title | | Publisher | Language | Edition | Year |
|---|--------------------|------------|--------------------------|-----------|----------|--------------|----------|
| Author | Material Type | Binding | Quantity | Price | Extended | Details | |
| ----- | | | | | | | |
| ORDER Page 2 | | | | | | | |
| Issued Date: 11/01/2001 | | | | | | | |
| Account Number: SKYVW244 | | | | | | | |
| Order Number: 4 | | | | | | | |
| ----- | | | | | | | |
| MAG 114 | Magic time | | | | | | |
| Andrews, Kristi. | | | Galaxy Press | | | | 1987 |
| Sound Recording | | | | Clingon | | 1st | |
| Please wrap books separately. | | | 8 | \$1.00 | | | \$8.00 |
| ----- | | | | | | | |
| HM 123 | Harry's Mad | | | | | | |
| King-Smith, Dick. | | | Running Tree Publisher | | | | 1987 |
| Book (Monograph) | | Spiral | | English | | 1st American | |
| This is an additional note for the order. | | 4 | | \$24.95 | | | \$99.80 |
| ----- | | | | | | | |
| THT 149-618 | The Halloween tree | | | | | | |
| Bradbury, Ray, 1920- | | | Running Press Publishers | | | | 1972 |
| Picture, Study Print | | Soft cover | | English | | 1st ed. | |
| | | | 12 | \$13.69 | | | \$164.28 |
| ----- | | | | | | | |

| Items Ordered: | | Total: | |
|---|----|----------------|----------|
| ORDER Page 3 | | | |
| Issued Date: 11/01/2001 | | | |
| Account Number: BUZZ244 | | | |
| Order Number: 4 | | | |
| ----- | | | |
| Items Ordered: | 24 | Total: | \$272.08 |
| | | Discount: | \$27.20 |
| | | Shipping/Misc: | \$14.25 |
| | | Sum: | \$259.13 |
| ----- | | | |
| Signature(s): | | | |
| _____ | | | |
| _____ | | | |

Chapter 30 Alliance Plus basics

This chapter contains a description of Alliance Plus and instructions for starting Alliance Plus. These instructions are also valid for Alliance Plus for Union.

About Alliance Plus

Alliance Plus lets you add or enhance library bibliographic records with information from Alliance Plus Online, any Alliance Plus CD (MARC, A/V ACCESS, Vintage, or Alliance Plus for Books in Canada), or your union catalog database. If you have a subscription to Reading Program Recon, you can also enhance your records with reading program information in the 526 tags. As a result of these enhancements, you can expect an increase in your collection circulation and in the effectiveness of searches conducted by your patrons. Alliance Plus provides you with three methods for updating the library database:

- **Autorecon:** During this automated process, Alliance Plus examines the bibliographic records in the library database and compares them to the records on the selected Alliance Plus data source. When it finds matching records, the application uses the information contained in the records of the data source to enhance the library records.
- **Process Misses:** This manual process relies on you to examine each library record skipped during an Autorecon. It lets you decide whether any matches exist and what modifications are in order. We recommend that you run a Process Misses after each Autorecon.
- **Reading Program Recon:** During this automated process, Alliance Plus examines your uploaded quiz file and enhances matching bibliographic records with 526 tags.

These methods limit the process to the bibliographic records and have no effect on any copies associated with the records being enhanced.

You can also use an Alliance Plus data source with Cataloging to add individual bibliographic records from the data source to the library database. For details about using Alliance Plus databases with Cataloging, see “Finding MARC records in your collection” on page 240.

Starting Alliance Plus

Important: Only one workstation can access Alliance Plus at a time. If you attempt to start Alliance Plus while the application is running at another workstation, you receive a warning message.

From the computer desktop, open the Follett Applications folder and double-click the Alliance Plus icon. You can also access the Follett Applications from the Windows Start | Programs menu or from the Mac OS Apple menu.

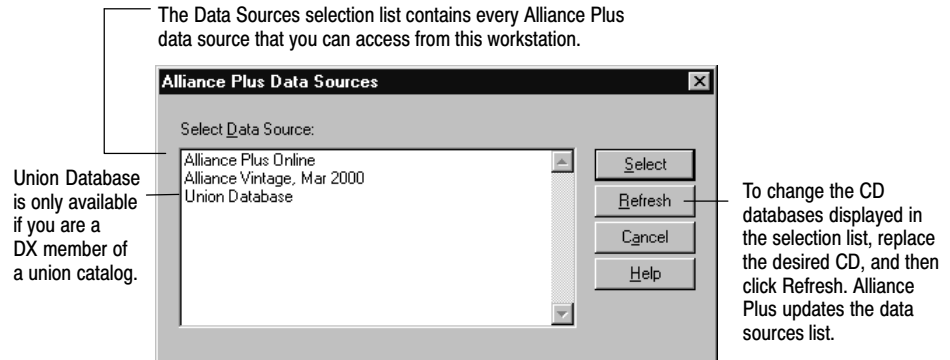
If you are using the password protection option in System Setup to limit access to Cataloging, a password dialog appears. Enter the Cataloging password (by default **MODTITLE**), and click OK.

Note: Cataloging and Alliance Plus share the same password.

See also: For more information about password protection, see “Protecting your Follett applications with passwords” on page 40.

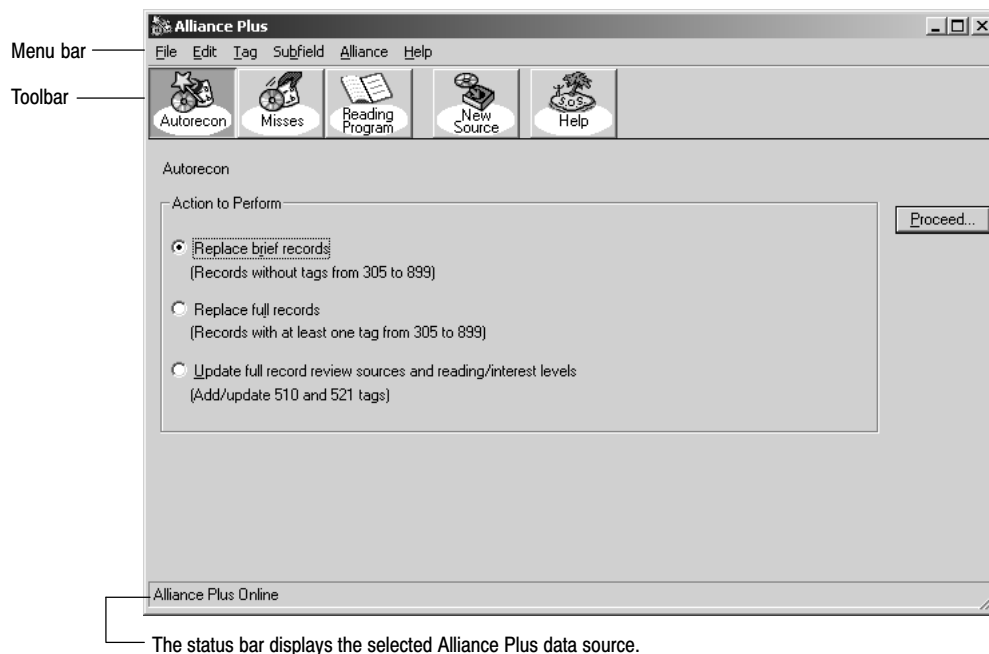
Choosing Alliance Plus Online or an Alliance Plus CD

During startup, Alliance Plus determines if Alliance Plus Online or any Alliance Plus CDs are available. If you are a DX-enabled member of a union catalog, it also checks your union catalog connection. Alliance Plus then displays its Data Sources dialog with your resources listed:



Highlight the Alliance Plus data source you want to use, and then click Select. The Alliance Plus main window appears, showing your choice at the bottom:

Note: To perform a Reading Program Recon for Accelerated Reader or Reading Counts!, Alliance Plus Online must be selected.



The status bar displays the selected Alliance Plus data source.

See also: If you have a subscription to Alliance Plus Online but cannot connect to it from your Windows workstation, you may need to re-enter and save your Follett Customer Number in System Setup | Site | Identification, or you (or your technician) may need to enter your proxy server information on the System Setup | Cataloging | Misc tab. For more information, see page 58 in Chapter 3, “Preparing to catalog your collection;” or for more technical information, see the *Installation Guide*.

Using Alliance Plus

From the menu bar, you can access each of the functions included in Alliance Plus, as well as the help features.

- **File**—Contains the commands for saving, closing, and printing updated bibliographic records. These commands are only available when you are editing a bibliographic record during a Process Misses session. This menu also contains the Exit command. Use this command to close Alliance Plus.
- **Edit**—Contains the standard text editing commands and the insert diacritic option. These options are only available when you are editing a bibliographic record during a Process Misses session.
- **Tag**—Contains the commands for adding and deleting tags from bibliographic records. From this menu, you can also update the record’s

leader or fixed-length tags and modify the indicators for the tag currently occupied by the cursor. These options are only available when you are editing a bibliographic record during a Process Misses session.

- **Subfield**—Contains the commands for adding and deleting subfields from the tag currently occupied by the cursor. These options are only available when you are editing a bibliographic record during a Process Misses session.
- **Alliance**—Contains the commands used to access the Autorecon, Process Misses, and Reading Program Recon options or change the data source currently used by Alliance Plus. The Autorecon, Misses, Reading Program, and New Source buttons displayed in the toolbar let you access the same features.
- **Help**—Contains the commands used to access the help topics, glossary, and product information for Alliance Plus. The Help button on the toolbar lets you access the appropriate topic for the current Alliance Plus feature.

Chapter 31 Autorecon and Reading Program Recon

This chapter contains a description of the Autorecon process and instructions for conducting an Autorecon (automated retrospective conversion) and a Reading Program Recon.

About the Autorecon process

Autorecon enhances the library's bibliographic records with information from Alliance Plus Online or an Alliance Plus CD database.

Important: Depending on the size of your database, the available bandwidth of your network, and CD drive speed, the Autorecon process may take several hours. We suggest you run this process overnight. However, if this is not convenient, you can spread the Autorecon process out over a number of days by running it a few hours at a time, interrupting the process, and then restarting it as desired. If you do decide to interrupt the Autorecon process, we strongly recommend that you keep any maintenance activities (adding or editing records) to a minimum until the Autorecon is finished.

During Autorecon, Alliance Plus processes bibliographic records in the library database by comparing the record's LCCN, ISBN, or ISSN, record type, and the first eighty characters of the title, stored in the 245 tag, with the records on the Alliance Plus data source. If both the number and the title match, Alliance Plus replaces the brief or full bibliographic record or updates the full bibliographic record in the library database with information from the matching record on the Alliance Plus data source. If Alliance Plus does not find a match, it skips the record. The application also skips temporary records and any record that doesn't have at least one copy record with a call number.

This process is limited to the bibliographic records and has no effect on any copies associated with the record being enhanced.

The brief and full record ranges described in the following Autorecon process options are based on the definition you provided in the Brief Records tab under Cataloging setup in System Setup (see page 54):

- Replace brief records—Replaces local brief records with records from the Alliance Plus data source.
- Replace full records—Replaces local full records with records from the Alliance Plus data source.
- Update full record review sources and reading/interest levels—Replaces the local record's reading and interest levels with information from the Alliance

Plus data source and adds any new review sources to the local record. You can use this option to enhance your local full bibliographic records by adding interest and reading levels or to update local records previously processed with an older Alliance Plus data source.

Note: Your patrons can use the reading and interest levels to limit the scope of searches conducted with OPAC. See page 470 for more information.

Bibliographic record modifications

The following sections describe how Alliance Plus modifies bibliographic records during the Autorecon process. Refer to the section that applies to the Autorecon process option in question.

Replace brief or full bibliographic records

When Alliance Plus finds a data source record that matches a record in the library database, it deletes all the tags from the local record with exception of the following locally-defined tags:

- 521
- 526
- 590-599
- 658
- 690-699
- 790-799
- 856
- 900-939
- 941-999

It then inserts new tags from the matching record on the Alliance Plus data source, and copies the information from the local 001 and 003 tags to the new 035 tag. If the record doesn't have a 003 tag, it copies the contents from the 040 tag instead. The 035 tag contains the system control number and identifies the record as being from another computer system.

Alliance Plus also copies reading and interest level and review source information from the data source record's 940 tag into the library record. The application follows the current MARC 21 standard by storing the copied information in subfield a of each of the following tags:

| Information | Library record tag |
|----------------|--|
| Review source | 510 Note: Since the subfields in the 510 tag are not repeatable, Alliance Plus adds a separate 510 tag for each review source stored in the 940 tag. |
| Reading level | 521 (first indicator: 0) |
| Interest level | 521 (first indicator: 2) |

Update review sources and reading/interest levels

Alliance Plus compares the reading and interest level and review source information in each library bibliographic record against the information in the

matching data source record. If the library record doesn't contain any reading or interest level information or if the information does not match, Alliance Plus replaces the data in the library records with the information from the data source. If the data source contains different review source information, Alliance Plus adds the new information to the review sources already in the library record.

The table on page 386 displays the tags that Alliance Plus uses to store the reading and interest levels and review sources.

Preparing for an Autorecon

If you are not certain that an Autorecon will benefit your library, we suggest you run a Brief Records Report (see page 503). This report gives you a list of the bibliographic records Alliance Plus examines during the Autorecon process. By running the same report after the Autorecon, you can determine the effectiveness of the process and generate a list of the brief records you may encounter during the Process Misses session.

Since Autorecon uses standard numbers to compare the bibliographic records stored in the library database to the records in the data source database, it's important that the standard number information in your library's records be as complete as possible. If Alliance Plus cannot find a matching standard number in the data source database or encounters a local record without a standard number, it skips the record. To help you make the most of the Autorecon feature, we suggest you run the Titles Without Standard Numbers Report (see page 534) before starting the process. The information contained in this report gives you the opportunity to locate and correct any bibliographic records without an ISBN, ISSN, or LCCN.

Bibliographic records that share a standard number and title can also pose a problem for the Autorecon feature. If Alliance Plus discovers two or more records that share the same standard number and title, and that match a record on the data source, it may replace all matching records in the library database with the data source version (depending on the Autorecon option you selected). To avoid any potential problems related to this situation, we suggest you run the Titles With Duplicate Standard Numbers Report (see page 531) and make any necessary corrections before starting the Autorecon process.

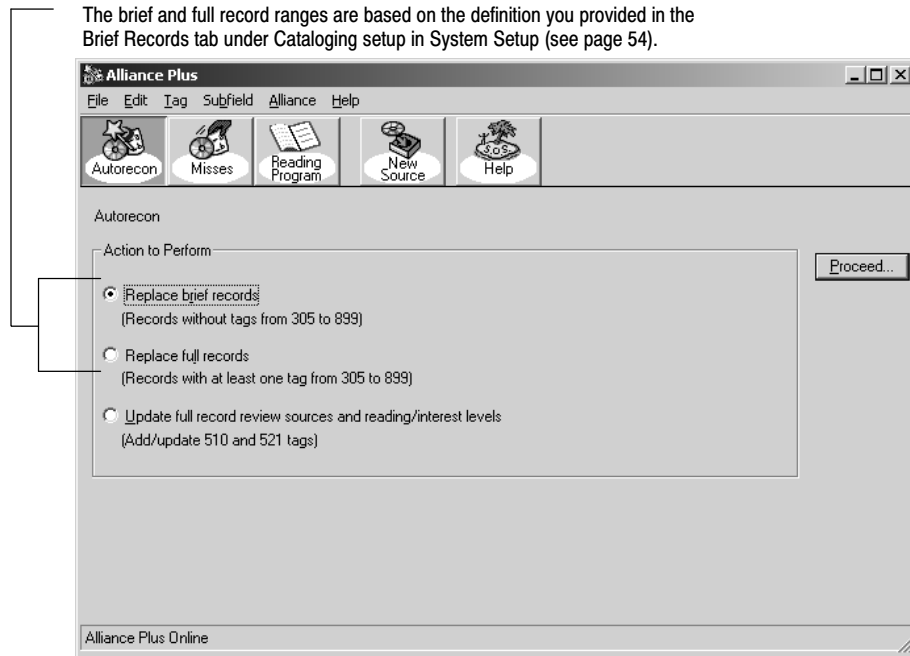
Autorecon only examines bibliographic records with at least one copy that contains a call number. To help you make the most of the Autorecon feature, we suggest you run the Titles Without Copies and the Copies Without Call Numbers Reports before starting the process. The information contained in these reports gives you the opportunity to locate and correct any bibliographic records without copies or copies without call numbers.

Running an Autorecon

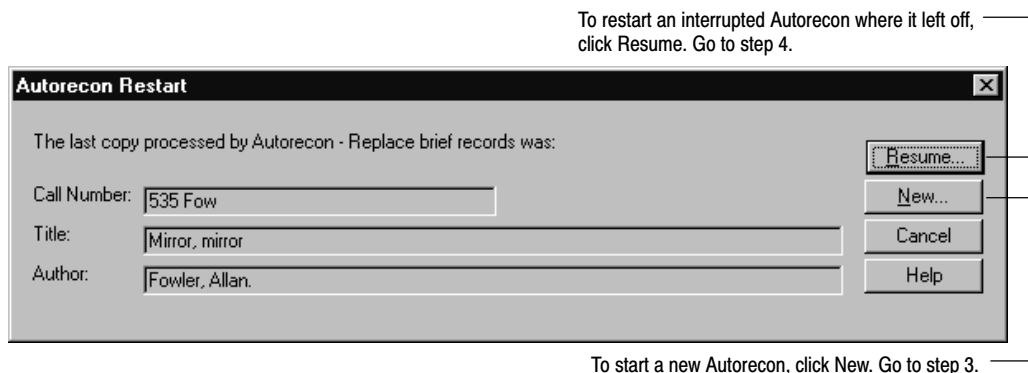
Important: Only one workstation can access the Alliance Plus module at a time. If you attempt to start Alliance Plus while the application is running at another workstation, you receive a warning message.

Before starting Autorecon, make sure no one is adding, updating, or importing bibliographic records into the library database. This reduces the likelihood that Alliance Plus will encounter any problems during the process and ensures that the application checks every bibliographic record in the library database.

1. From the Alliance Plus main window, click Autorecon. The Autorecon options appear:

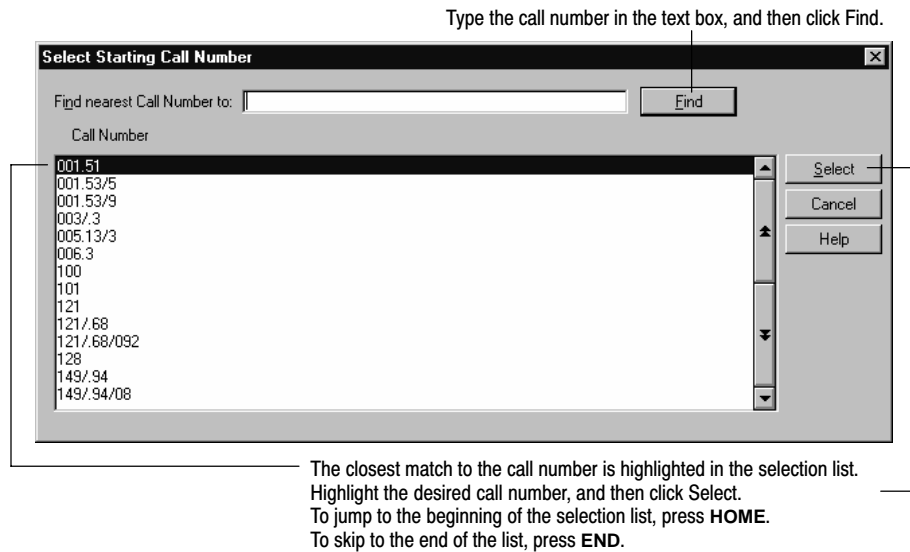


2. Select the desired Autorecon process option, and then click Proceed. If you selected Replace full records or Update full record review sources and reading/interest levels, a confirmation message appears. To continue, click Yes. If the last Autorecon you ran was the same process option and was interrupted, the Autorecon Restart dialog appears:



Important: If you want to continue with an interrupted Autorecon, make sure you select the same Alliance Plus data source that was used during the interrupted process (see page 382).

If you have not run an Autorecon or completed the last Autorecon, the Select Starting Call Number dialog appears:



3. In the Select Starting Call Number dialog, enter the copy call number you want to start with during the Autorecon process and click Select. An Autorecon progress window appears while Alliance Plus processes the bibliographic records in the library database.

See also: For a description of the changes made to the library's bibliographic records, see "Bibliographic record modifications" on page 386.

Important: If the library has installed Catalog Plus, Alliance Plus deletes the keywords from the records being replaced. However, if you selected the "Create Keyword Entries as MARC Records are Saved" option in System Setup (see page 55), Alliance Plus rebuilds the keywords for the replacement record. If this option is not selected, you should run the Update Keywords option in Cataloging (see page 345) after running Autorecon.

As Alliance Plus processes each bibliographic record, the progress window displays the results of the record comparison. The progress window also keeps track of the number of records processed and missed (not found).

The figure displayed in the Records Not Found field represents the bibliographic records Alliance Plus couldn't match during the Autorecon process. Use the Process Misses feature to enhance these records after the Autorecon is complete (see Chapter 32, "Process Misses").

| | | | |
|-----------------------|--------------|--------------------|-----------|
| Starting Call Number: | 94.27 SEGUR | Records Replaced: | 32 (16%) |
| Current Call Number: | PB KING 1011 | Records Not Found: | 160 (83%) |
| Total Records: | 243 | | |
| Records Processed: | 192 | | |
| Processing Errors: | 0 | | |

To interrupt the Autorecon process, click Cancel. The Alliance Plus main window reappears.

Note: Stopping the process does not undo the changes on the processed records.

When the process is complete, the Cancel button changes to Close.

4. Click Close. The Alliance Plus main window reappears. If any errors occurred during the Autorecon process, Alliance Plus generates an exception report and uses the application associated with text files to display the report.
5. If you are using Alliance Plus CDs and want to run the autorecon against another one, replace the processed CD and click New Source. On the Data Sources dialog, click Refresh, highlight the CD, click Select, and then repeat the Autorecon process.

Tip: For best results, we encourage you to run Autorecon against Alliance Plus Online or the most current Alliance Plus MARC and Vintage CD databases that you have, before you start a Process Misses session. This lets Alliance Plus automatically process as many bibliographic records as possible and reduces the number of records you need to address manually using Process Misses.

6. Use the instructions presented in Chapter 32, "Process Misses," to search the Alliance Plus data source database for bibliographic records missed during the Autorecon.

About the Reading Program Recon process

Reading Program Recon enhances the library's bibliographic records with reading program information from Alliance Plus Online. If you do not have a

subscription to Alliance Plus Online, the Reading Program option will be disabled.

Important: Depending on the size of your database and the available bandwidth of your network, the Reading Program Recon process may take several hours. We suggest you run this process overnight.

Note: Unlike Autorecon, if you decide to interrupt the Reading Program Recon process, it will always start at the beginning. You do not have the option to select your starting call number.

Preparing for a Reading Program Recon

In order to process a reading program recon, you must extract a quiz file from Accelerated Reader or Reading Counts. It is important to have this file available before you begin the recon.

Reading Program Recon examines all bibliographic records with a standard number and at least one copy that contains a call number. To help you make the most of the Reading Program Recon feature, we suggest you run the Titles Without Copies and the Copies Without Call Numbers Reports before starting the process. The information contained in these reports gives you the opportunity to locate and correct any bibliographic records without copies or copies without call numbers.

We also suggest you run the Titles Without Standard Numbers Report (see page 534) before starting the process. The information contained in this report gives you the opportunity to locate and correct any bibliographic records without an ISBN, ISSN, or LCCN.

Important: Bibliographic records that do not contain a standard number or bibliographic records that represent a temporary copy will be skipped by this process.

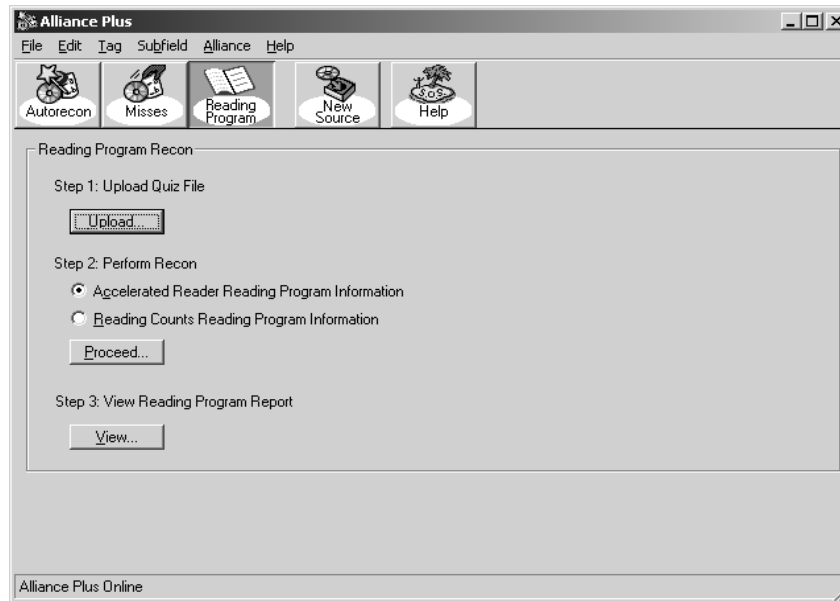
Note: To perform a Reading Program Recon for Accelerated Reader or Reading Counts, Alliance Plus Online must be selected.

Running a Reading Program Recon

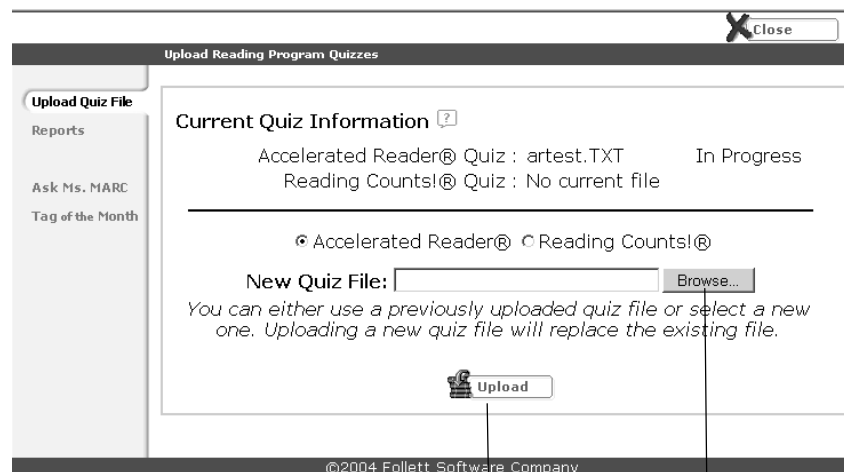
Important: Only one workstation can access the Alliance Plus module at a time. If you attempt to start Alliance Plus while the application is running at another workstation, you receive a warning message.

Before starting Reading Program Recon, make sure no one is adding, updating, or importing bibliographic records into the library database. This reduces the likelihood that Alliance Plus will encounter any problems during the process and ensures that the application checks every bibliographic record in the library database.

1. From the Alliance Plus main window, click Reading Program.



2. Select Upload to upload a quiz file.



After the quiz file has been selected, click the Upload button.

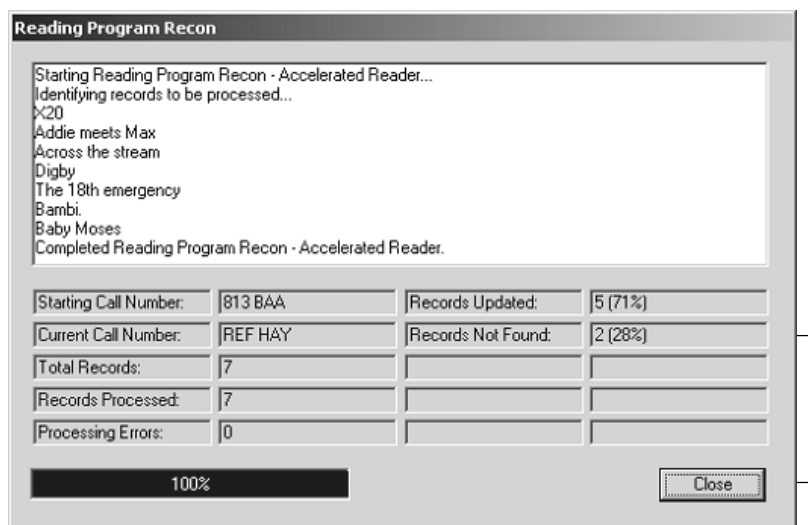
To upload a new quiz file, select browse.

Once the quiz file has been uploaded, click the Close button.

- After the quiz file has been uploaded, select the radio button for either Accelerated Reader or Reading Counts. Click Proceed to start the recon.

As Alliance Plus processes each bibliographic record, the progress window displays the results of the record comparison. The progress window also keeps track of the number of records processed and missed (not found).

The figure displayed in the Records Not Found field represents the bibliographic records Alliance Plus couldn't match during the Reading Program Recon process.



Click Close when the recon is completed.

- Click Close. If any errors occurred during the Recon Reading process, Alliance Plus generates an exception report and uses the application associated with text files to display the report.
- Click the View button to review a summary of the process. A list of quizzes without titles is also displayed.

Summary

Program: Accelerated Reader

Status: Completed 2004-02-11 16:05:13

Quizzes Read: 2,278

Titles Processed: 89

Titles Updated: 36

Quizzes with no matching titles: 2,273

The 18th Emergency LCCN: 80-028196 ISBN: 0-14-031451-2

20,000 Baseball Cards under the LCCN: 90-040704 ISBN: 0-679-81569-4

213 Valentines LCCN: 91-007151 ISBN: 0-8050-1536-1

The 89th Kitten ISBN: 0-590-42413-0

Abe Lincoln's Hat LCCN: 93-031867 ISBN: 0-329-02938-X ISBN: 0-679-84977-7

Notes

Chapter 32 Process Misses

This chapter contains a description of Process Misses and instructions for conducting a Process Misses session.

About Process Misses

Process Misses enhances the brief bibliographic records in the library database with information from an Alliance Plus data source. The difference between this feature and Autorecon is that Process Misses is not automatic. It allows you to examine each brief record in the library database, search the Alliance Plus data source for a match, and then decide whether to enhance the individual library record or not.

Process Misses is normally used after an Autorecon and is designed to process any brief bibliographic records that were not processed during an Autorecon. By running Autorecon before you start a Process Misses session, you have far fewer brief records to address manually.

Example: If a brief bibliographic record in the library database has a title of “Encyc Brit,” Alliance Plus does not recognize it as being an abbreviation of “Encyclopedia Britannica” and skips it during an Autorecon. By using the Process Misses feature after running Autorecon, you can recognize the obvious abbreviation and can enhance the bibliographic record in your library database accordingly.

Note: The brief and full record ranges are based on the definition you provided in the Brief Records tab under Cataloging setup in System Setup.

Process Misses automatically skips temporary records, full records, and any record that doesn't have at least one copy record with a call number.

Alliance Plus offers the following Process Misses options:

- Examine close matches—This option limits the library records to those brief records skipped during an Autorecon that have at least one LCCN, ISBN, or ISSN that matched an Alliance Plus record.
- Examine all brief records—This option allows you to process all the brief records in the library database.

For the best results, use the Examine close matches option. This option focuses on the library records which are most likely to yield positive results. The Examine all brief records option goes through each brief record in the library database

without considering whether the local record has standard numbers. As a result, examining all brief records can be extremely time consuming.

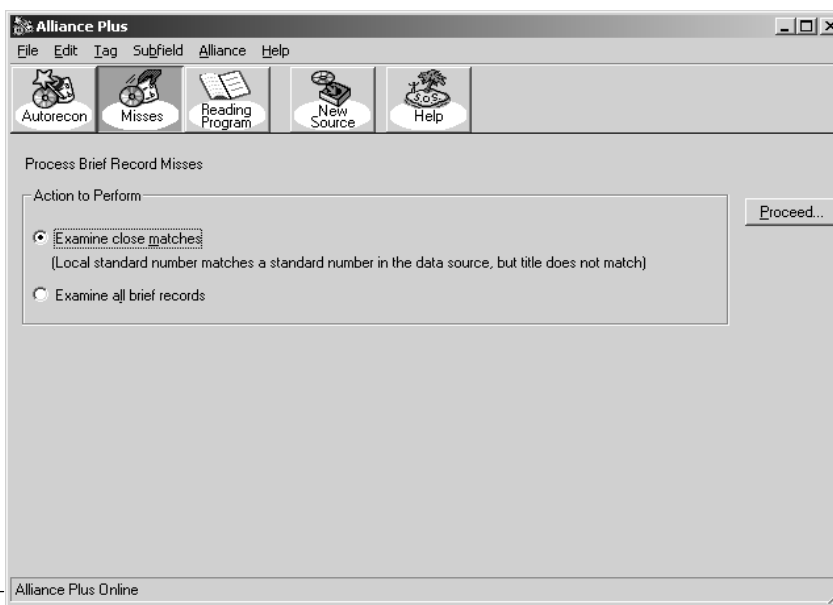
Running Process Misses

Before starting the Process Misses session, we strongly encourage you to run an Autorecon for all available Alliance Plus data sources. This lets Alliance Plus automatically process as many bibliographic records as possible and reduces the number of records you need to address manually using Process Misses. After Autorecon is complete, make sure you run a Brief Records Report (see page 503). This report gives you a list of the brief records you may encounter during the Process Misses session.

Use the following instructions to process records missed during the Autorecon process:

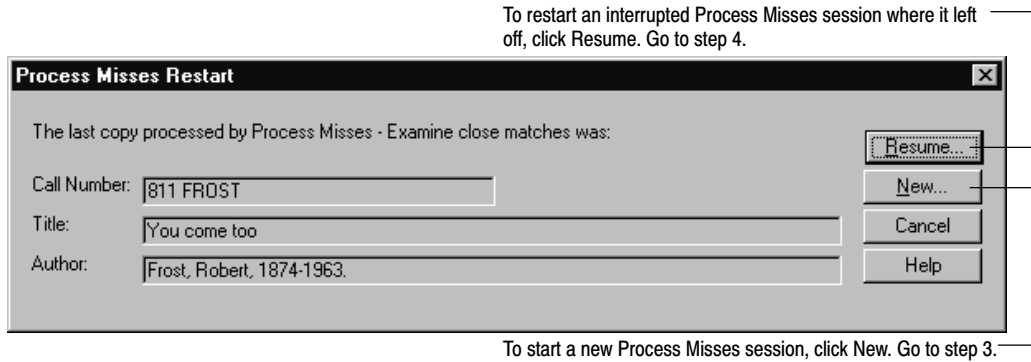
Important: Only one workstation can access Alliance Plus at a time. If you attempt to start Alliance Plus while the application is running at another workstation, you receive a warning message.

1. From the Alliance Plus main window, click Misses. The Process Brief Record Misses options appear:

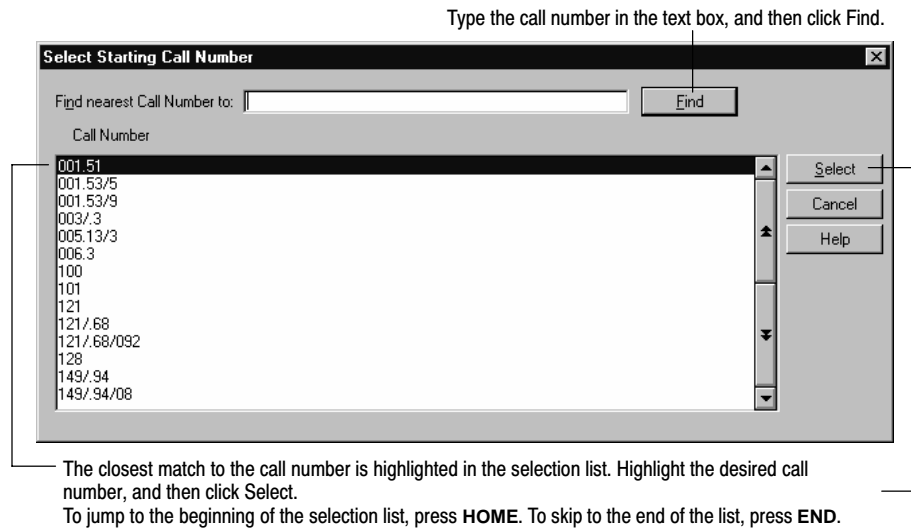


Displays the selected Alliance Plus data source

2. Select the option you want to use to process the records missed during Autorecon, and then click Proceed. If you interrupted the last Process Misses session, the Process Misses Restart dialog appears:



If you have never started a Process Misses session, have finished the previous Process Misses session, or have run an Autorecon since the last Process Misses session, the Select Starting Call Number dialog appears:



3. Type the copy call number you want to start with during the Process Misses session and click Select. The brief record processing options appear:

The brief bibliographic record from your library database

The selection list containing the full bibliographic record from the Alliance Plus data source

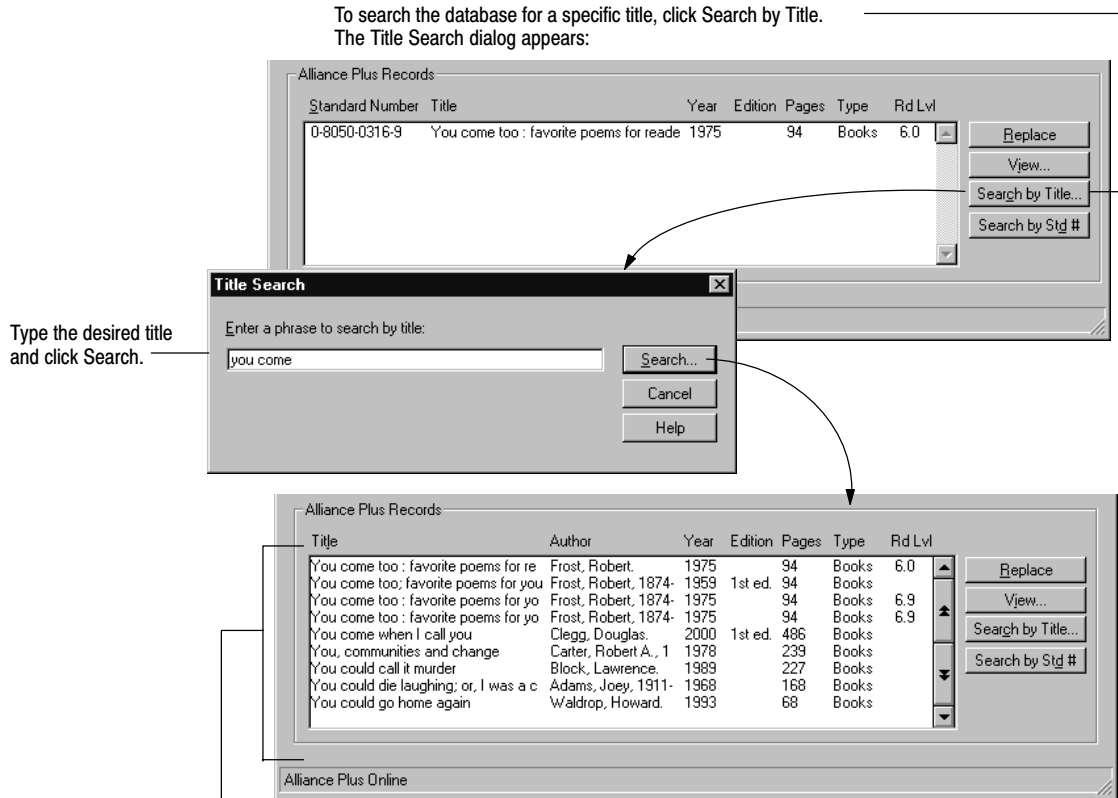
To skip to the next brief bibliographic record in the library database that matches the selected Process Brief Record Misses option, click Next.

4. From the selection list, highlight the bibliographic record in the Alliance Plus data source that matches the brief record in your library database. Use the Search by Std# and Search by Title options to locate the matching data source record.

To search the database for a matching ISBN, ISSN, or LCCN, click Search by Std #.
Note: If the bibliographic record in the library database does not have a standard number, this option is not available.

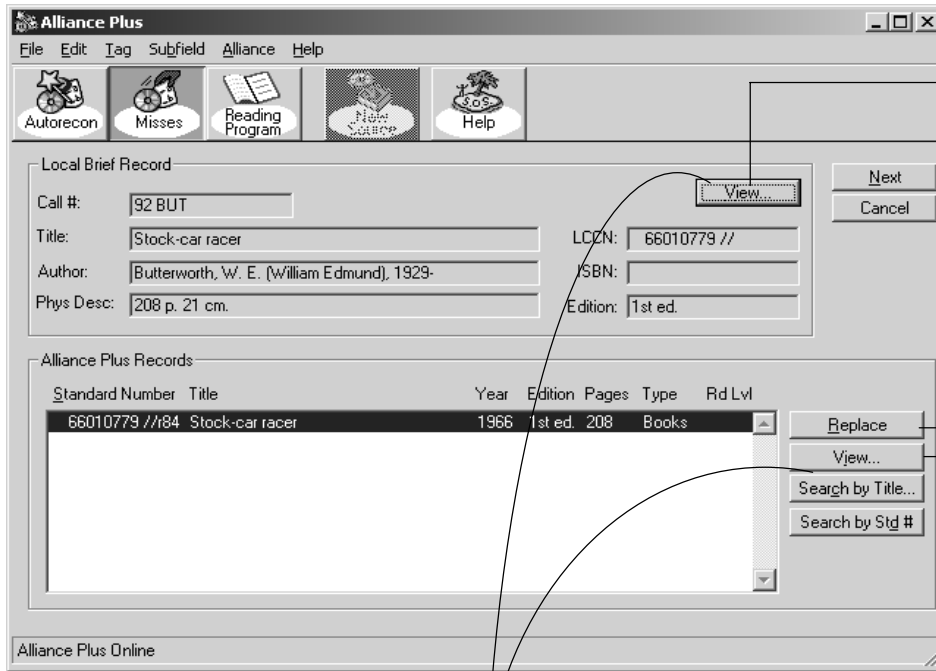
The selection list changes to display the records in the data source containing standard numbers that match the record stored in the library database, and the column headings change to match the selected search method.

To search the database for a specific title, click Search by Title.
The Title Search dialog appears:



Alliance Plus highlights the closest matching title in the selection list when searching a CD, and an exact match when searching Alliance Plus Online. The column headings change to match the selected search method.

- Once you have identified the bibliographic record on the Alliance Plus data source that best matches the record in the library database, you are ready to replace or update the library record.



To examine or edit the bibliographic record in the library database, click View.

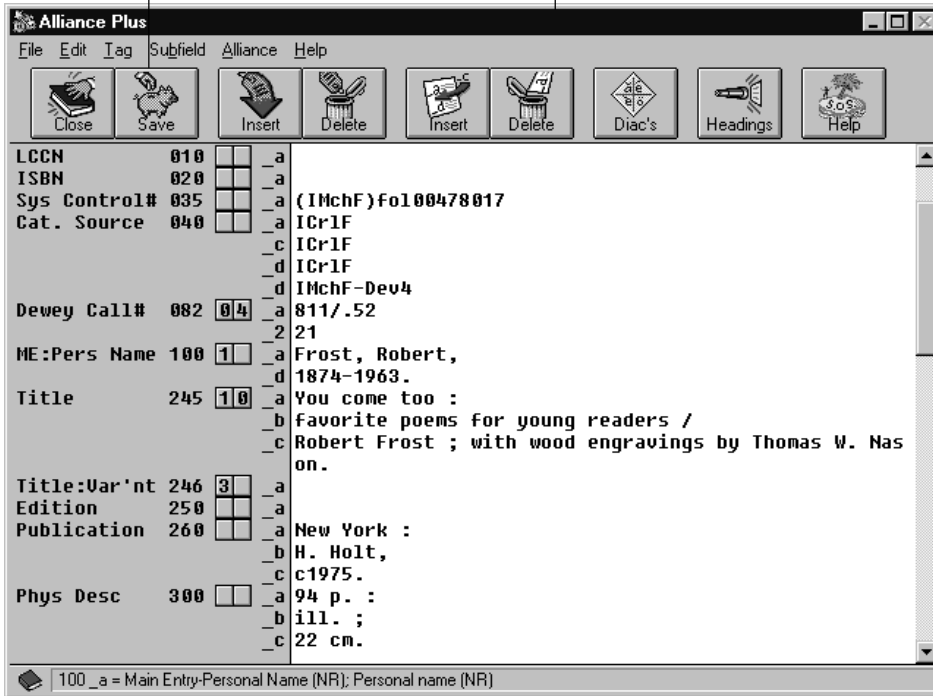
To skip to the next brief bibliographic record in the library database that matches the selected Process Brief Record Misses option, click Next.

To replace the brief record in the library database with the highlighted record from the Alliance Plus database, click Replace.

To examine or edit the bibliographic record in the Alliance Plus database before copying it into the library database, click View.

Clicking Save replaces the record in the library database with the edited version being viewed. For a description of the changes made to the library's bibliographic records, see "Replace brief or full bibliographic records" on page 386.

Make the desired changes to the bibliographic record. For instructions on updating MARC records, see the instructions beginning on page 265.



100 _a = Main Entry--Personal Name (NR); Personal name (NR)

Important: If the library has installed Catalog Plus, Alliance Plus deletes the keywords from the records being replaced. However, if you selected the Create Keyword Entries as MARC Records are Saved option in Cataloging setup, Alliance Plus rebuilds the keywords for the replacement record. If this option is not selected, you should run the Update Keywords option in Cataloging after running Process Misses.

See also: For a description of the changes made to the library's bibliographic records, see "Replace brief or full bibliographic records" on page 386.

As you skip, replace, or update each record in the library database with information from the data source, Alliance Plus advances to the next brief record in the library database that matches the selected Process Brief Records Misses option. Once you have addressed all available brief records, the Process Brief Records Misses options reappear. For a list of the brief records not processed during the Process Misses session, run a Brief Records Report (see page 503).

Notes

Chapter 33 Setting up your search stations

Use the information in this chapter to set up your OPACs. You can choose which interface—text or visual—to display to your patrons; whether they have access to other applications; and what search and print options are available to them.

The setup is applied to the individual search station. This lets you define each station with a unique set of options. If you wish to modify the default settings, you must do so at each search station, or see page 429 for information on copying setups from one search station to another.

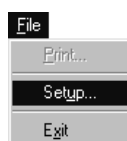
To set up the Patron Empowerment feature, in which patrons can log on to view their circulation information or place holds and reserves, go to System Setup | Setup | Patron Maintenance | Patron Defaults. Instructions for the setup begin on page 74. Instructions for using Patron Empowerment in OPAC begin on page 472, for WebCollection Plus, on page 445.

Accessing Setup

To start OPAC, from the computer desktop, open the Follett Applications folder and double-click the OPAC icon. You can also access the Follett Applications menu from the Windows Start menu or from the Mac OS Apple menu.

Note: On a Windows computer, you can access Setup from anywhere in the OPAC by pressing **Ctrl + S**.

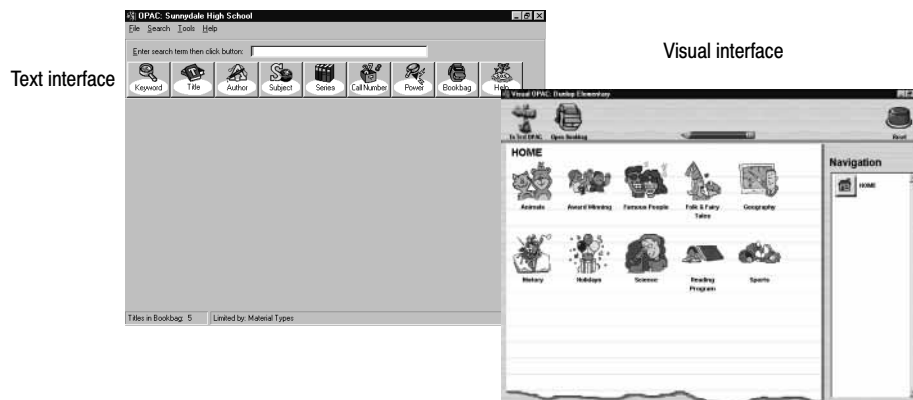
From the text interface File menu, choose Setup. If you previously defined a password for the Setup dialog, a password dialog appears. Enter the Setup password (by default **MODOPAC**) and click OK. The Setup dialog appears:



Saves all the settings and closes the Setup dialog

Abandons any changes on any tab and closes the Setup dialog

Many of the setup options depend on which interface, text or visual, or both, you use on your search stations. Each has its own windows and search options:



- The *text* interface lets the patron enter a term and choose one of the many indexes in your database to search. Patrons can narrow a search to find items belonging to a reading program or that meet Boolean search criteria, and set limiters on their searches. Search results are detailed and contain hyperlinks that let patrons expand or refine their searches. The Text OPAC Setup tab (see page 410) has options that apply only to the text interface.
- The *visual* interface is designed for less-experienced patrons. Its windows have abbreviated information, a graphical appearance, easy-to-use buttons, and larger fonts than the text interface. It incorporates pre-configured searches and a simplified type-in window. This interface is easier for patrons to use, but requires more time to set up. The Visual OPAC Setup tab (see page 415) has options that apply only to the visual interface.

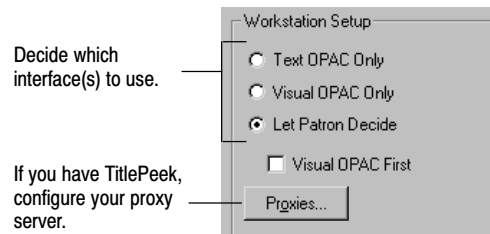
Both interfaces can provide patrons with many research tools. These include launching other applications, linking to Web pages, building bibliographies, viewing their search history, and printing selection lists, title records, and bibliographies.

The General Setup tab (see below) has settings for choosing the interface and options that apply to both interfaces.

General Setup tab

On the General Setup tab, you determine: which interface—text or visual, or both—to use at your search stations; whether or not patrons can access the printer, the Bookbag, other applications, or the Internet; and your passwords.

Choosing the OPAC interface



In the Workstation Setup box, you can choose to display the Text OPAC Only, the Visual OPAC Only, or give patrons the option of choosing the interface.

Note: If you choose Visual OPAC Only, the *only* way to access Setup on a Windows computer is by pressing **Ctrl + S**.



If you choose Let Patron Decide, there is a button on the visual interface toolbar for the patron. Clicking that button changes the window to the text interface. If you also want a toolbar button in the text interface, include the Go to Visual OPAC button in Toolbar Configuration on the Text OPAC Setup tab (see page 411).

To display the visual interface when you first launch the OPAC, and when the station automatically resets, select the Visual OPAC First check box.

Important: If you are using the visual interface, the color depth of your search station monitors should be greater than 256 (8-bit). This optimizes the speed in displaying the windows, and improves the clarity of the graphics. Please see your operating system documentation for checking or changing this setting.

Important: If you are using the visual interface on Mac search stations, you must increase the memory allocation. See your technical administrator, or highlight the OPAC icon inside the CC40\MOPAC folder, and click on File | Get Information | Memory. Set both the Minimum size and the Preferred size to 10240K. This is a local setting, so you must change it at each search station using the visual interface.

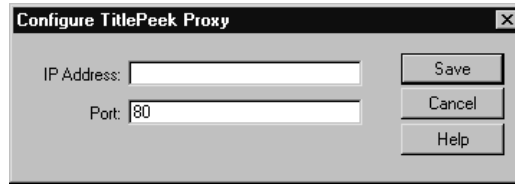
In the Union Catalog OPACs: The visual interface option is not available and its setup tab is disabled.

Entering your proxy server information

If your patrons cannot access TitlePeek from your Windows search stations even though you have a subscription to the service, you may need to enter your proxy configuration. This information redirects the TitlePeek requests from your Windows search stations to your proxy server.

Please consult your technical coordinator before making this configuration.

Enter the address of your proxy server and its port number for this service.



Click the Proxies button. Enter the IP address of your proxy server and either accept the default TCP port number of 80 or enter your custom port number. Click Save to close the dialog box.

Important: If your patrons *can* currently access TitlePeek, you do *not* need to change this proxy configuration.

Controlling user access

These options control whether or not patrons can print, save to file, use other applications, or exit the OPAC. They apply to both interfaces, text and visual.

Lets your patrons build a bibliography (up to 500 titles)

Disables access to other applications and the 856 tag hyperlinks, and limits the ability to exit the OPAC

Lets you provide your patrons with access to additional applications by adding links to your text interface's Tools menu (see "Providing access to other applications" on page 408)

Lets patrons print search results, Bookbag, patron information, and events

In the text interface, lets patrons save Bookbag list to hard drive or floppy disk

Resets the search station after the specified time (up to 99 minutes)

Selecting Let patrons print allows patrons to print search results, the Bookbag contents, their patron information (if you allow them to log on and access it), and Events. Clearing it removes the Print buttons from both interfaces.

The Let patrons use the Bookbag option allows your patrons to create a bibliography list that can be edited, and printed (if enabled above). It can also be saved to a file or floppy disk if Enable save to file is selected.

Selecting Disable access to other applications disables *all* links to any other applications. This includes 856 hyperlinks, netLibrary Preview and Check Out buttons, Find-It-All, TitlePeek, Follett eBooks, Print Preview, Save to File, and any links to outside applications that you may have added to the Tools menu.

Note: If you disable links to other applications, you must also define the Exit password (see "Setting up passwords" on page 409).

See also: For more information about accessing the Internet and other electronic media using the 856 tag, see page 466.

To deter patrons from exiting the OPAC, the following also occurs when you select the Disable access to other applications option:

- The OPAC launches in full screen mode.
- On a Macintosh workstation, all other processes stop when the OPAC is launched.
- When the OPAC is open, the operating system functions in the table below are modified on Mac OS and Windows 95/98 and NT workstations:

| Button, Key Combination, or Menu Function | Windows 95 and 98 | Windows NT | Mac OS |
|--|--------------------------|-------------------|--|
| Alt + Esc | Disabled | Not modified | N/A |
| Alt + F4 | Requires password | Requires password | N/A |
| Alt + Tab | Disabled | Not modified | N/A |
| Close Window button | Requires password | Requires password | Requires password |
| Cmd + Option + Esc | N/A | N/A | Returns user to Finder |
| Cmd + Q | N/A | N/A | Requires password |
| Cmd + Shift + Power | N/A | N/A | [System reboots] |
| Ctrl + Alt + Delete | Disabled | Not modified | N/A |
| Ctrl + Esc | Disabled | Not modified | N/A |
| Control Menu button | Requires password | Requires password | N/A |
| File Exit on menu | Requires password | Requires password | N/A |
| Maximize button | Hidden | Hidden | Not modified |
| Minimize button | Hidden | Hidden | Not modified [No other applications running] |
| Shortcut menu | Requires password | Requires password | N/A |
| Start key | Disabled | Not modified | N/A |
| Start button / Taskbar | Hidden | Hidden | N/A |
| System bar | N/A | N/A | Available [No other applications running] |
| Title bar (double-click) | Disabled | Disabled | N/A |

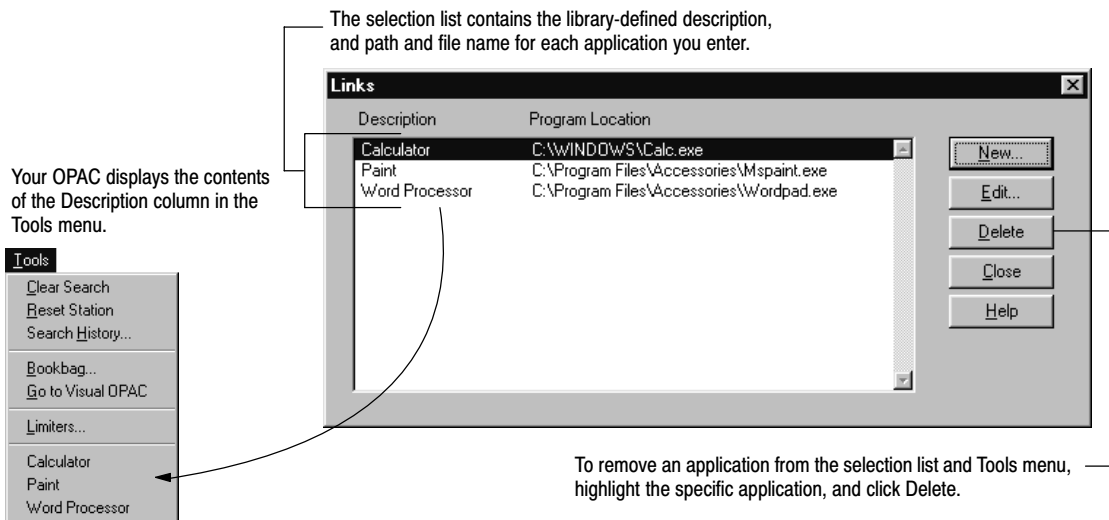
| Button, Key Combination, or Menu Function | Windows 95 and 98 | Windows NT | Mac OS |
|---|-------------------|-------------------|--------|
| Title bar (right-click) | Requires password | Requires password | N/A |
| Windows key | Disabled | Not modified | N/A |

Note: If you want to further restrict your patrons' access to your system, you may want to purchase third-party security software. There are, also, some security features in the Windows operating system that you can set up to restrict access to other applications. For more information, consult the user manuals for your operating system or a third-party consultant.

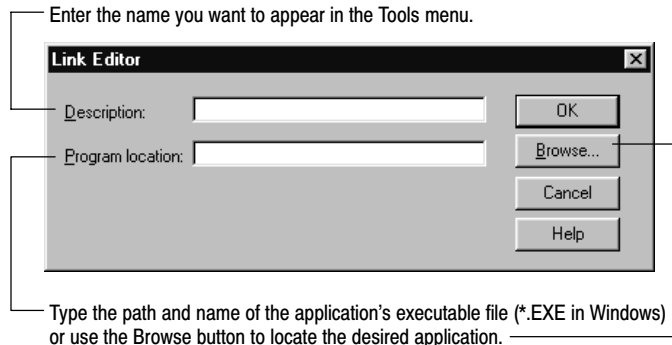
If you select the Reset inactive search station option, after the specified time the application clears the current search information, Bookbag, and search history, returns the limiter options to the default settings, logs the patron out, and redisplay the default interface.

Providing access to other applications

1. To add links to other applications used by your library, click the Edit Links button on the General Setup tab dialog. The Links dialog appears:



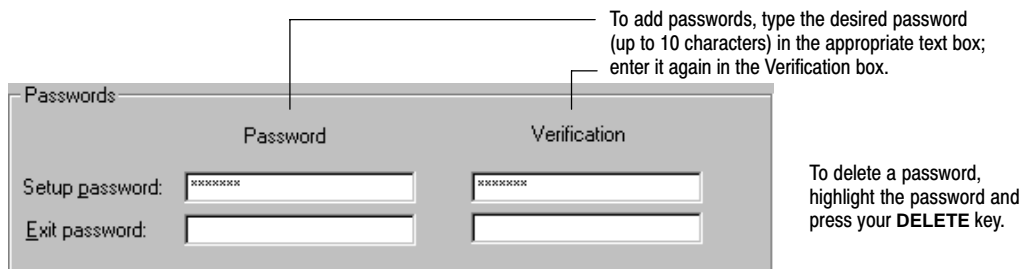
2. To add a new application to the selection list and Tools menu, click New. To update an existing application, click Edit. The Link Editor dialog appears.



3. After entering an appropriate name in the Description field and identifying the application's path and file name in the Program location field, click OK.

Setting up passwords

In the Passwords box, defining a Setup password (by default **MODOPAC**) prevents patrons from accessing the Setup dialog and changing the settings or passwords at this search station. Defining an Exit password prevents them from closing your OPAC. Asterisks mask the passwords as you type; you must type them again for verification. We strongly recommend the use of passwords.



Clicking Save closes the Setup dialog and returns you to the main window of OPAC in the interface you chose in Workstation Setup on the General Setup tab.

Important: When you select Visual OPAC only or Let Patron Decide (and you have no action buttons defined yet), and click Save on any of the three Setup tabs, a message asks if you want to import the default button set for Visual OPAC.

If you plan to use the visual interface or would just like to explore it, click Yes to add the button set to your database. You can edit or delete any of these buttons later.

If you choose No, you must create and configure your own buttons and sets. See page 418 for instructions. Once you create a button, you do not have the option of importing the default set.

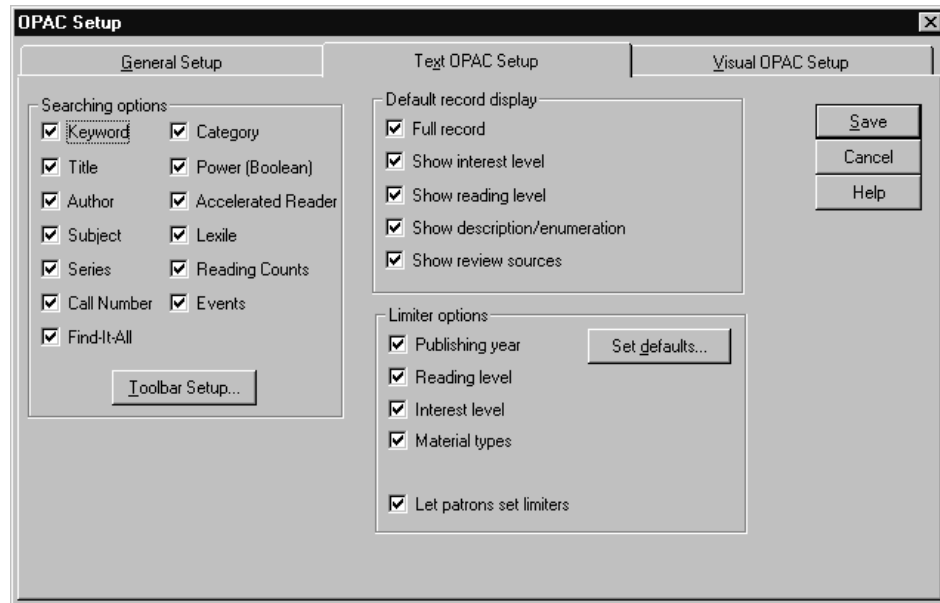
What's next?

Now that you have determined which interface to use at your search stations, what access the patrons have, and your passwords, you can set up the

interface-specific options. If you are using the text interface, continue below. If you are using the visual interface only, go to page 415.

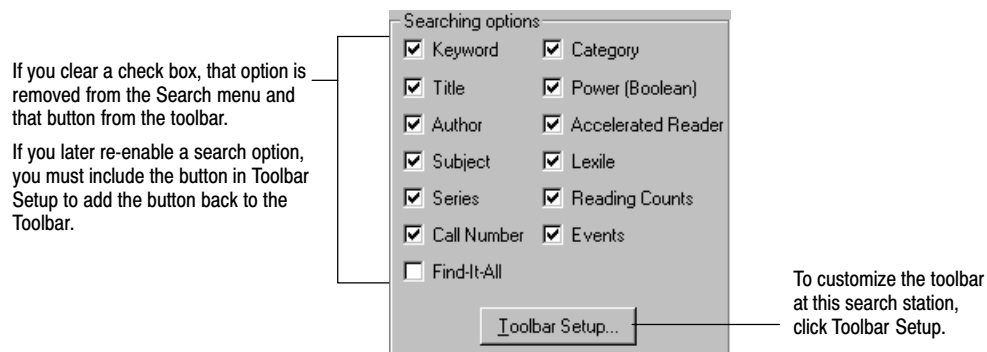
Text OPAC Setup tab

On the Text OPAC Setup tab are controls that apply only to the text interface:



Choosing search options

The searching options determine what searches are available at this search station.



Consider the following when you select the searching options:

- If you do not maintain keywords, clear the Keyword and Power check boxes.

- Unless your copies are assigned categories that are meaningful to your patrons, clear the Category check box.
- If you do not enter Events in System Setup, clear the Events check box.
- If purchased, select Find-It-All to search free and subscription-only informational databases, such as Grolier or Britannica or gain access to over 160,000 safe, high-quality Web sites aligned to both state and national standards.
- If your MARC records have Accelerated Reader information in the 526 tag, select the Accelerated Reader check box.
- If your MARC records have Reading Counts information in the 526 tag, select the Reading Counts check box.
- If your MARC records have Lexile Measure information in the 521 tag, select the Lexile check box.

For Union Catalog Plus: The Category, Visual OPAC, and Patron Empowerment buttons are not available. The Events displayed are those of the union catalog, not the members.

Customizing the toolbar

Do you prefer large or small buttons? Are there certain searches or features that you want to make readily accessible? OPAC lets you easily change the appearance of the toolbar. To customize your toolbar, from the Text OPAC Setup tab's Searching options, click Toolbar Setup.

The Included Buttons list displays all the options you have enabled on the General and Text OPAC Setup tabs, and in Patron Empowerment in System Setup. The Help button does not appear in this dialog. It is always available on the toolbar.



Use the Add >> and << Remove buttons to include and exclude buttons from the toolbar. Use the Move Up and Move Down buttons to define the order they should appear.

Any search or command button in the Excluded Buttons group box will not appear on the toolbar.

Select the button size you prefer.

The number of buttons that fit on the toolbar depends on the monitor’s desktop area and the size of the buttons. The buttons do not wrap to a second row. If you select more buttons than can be displayed, some of the buttons will not be accessible. The following table lists the number of buttons that can display at each standard monitor resolution.

Number of buttons per resolution on OPAC toolbar

| Button Size | 640 x 480 | 800 x 600 | 1024 x 768 | 1280 x 1024 |
|---------------|-----------|-------------------|------------|-------------|
| Large buttons | 9 | 12 (11 on Mac OS) | 15 | 19 |
| Small Buttons | 14 | 18 | 20 | 20 |

Whether or not you add a button for a feature to the toolbar, all the features you enable are accessible from one of OPAC’s menus.

Modifying the record display

These options determine how much of the MARC record is visible when title and copy information is displayed in your OPAC:

The image shows a dialog box titled "Default record display" with five checked checkboxes. Callout boxes provide instructions for each:

- Full record:** To have the full MARC record information appear by default, select Full record. Otherwise, the brief record appears.
- Show interest level:** To include interest or reading grade level notes (521 tag) in title information, select the appropriate check box. If a check box is cleared, the information does not appear or print.
- Show reading level:** (This option is grouped with 'Show interest level' in the callout.)
- Show description/enumeration:** To include the description/enumeration with the copy information, select this box. If the check box is cleared, the information does not appear or print.
- Show review sources:** To include review sources (510 tag) in title information, select this check box. If a check box is cleared, the information does not appear or print.

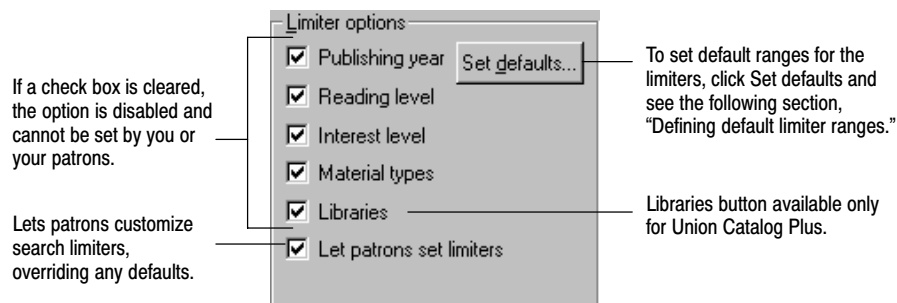
Patrons can always switch between brief and full records when viewing. For a list of the MARC tags used in full and brief record displays, see page 638.

Selecting limiter options

The limiter options you choose determine what limitations can be placed on searches at the current workstation.

Important: When using limiters, remember that if a record doesn’t contain the limiting information, your OPAC never displays it. This is particularly important when using reading and interest level limiters. To use these limiters effectively, your records must contain specific information in a 521 tag. For more information, see “Reading and interest levels and the 521 tag” on page 634.

To allow limiting by Publishing year, Reading level, Interest level, or Material types, select the appropriate check boxes.



Note: If all the limiter options are cleared, the Limiters option is inaccessible from either the toolbar or the Tools menu, and the Let patrons set limiters check box is disabled.

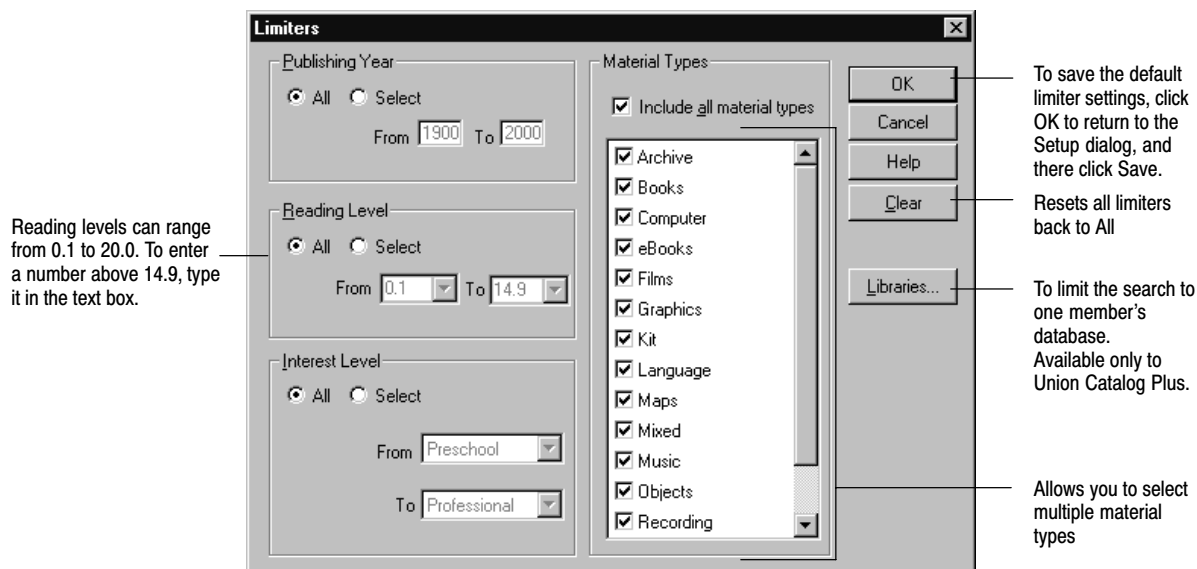
If you plan to let patrons limit their searches, but do not wish to set any default limitations, continue with “What’s next” on page 414.

For Union Catalog Plus: A Libraries option is available. Selecting this box allows limiting the search to the collection of a specific member. Clearing the box disables the Libraries button in the Limiters dialog. For ease of use to the patron, “Member” is referred to as “Library” in the OPAC.

Defining default limiter ranges

By default, your text OPAC uses any limiters defined here. If patrons are allowed to change the limiters (see page 470), their selections override these defaults.

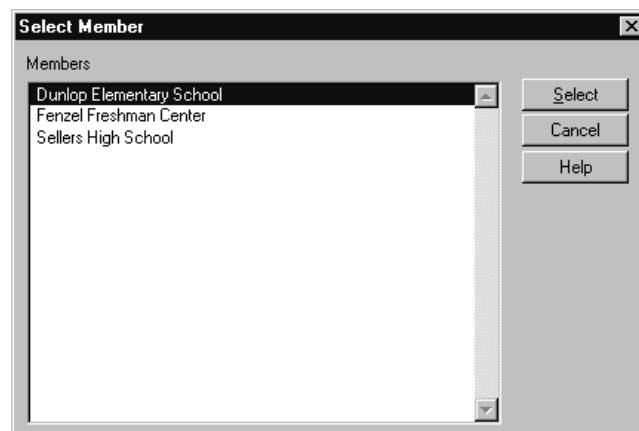
You can set defaults for publishing year, reading level, interest level, and material type. To set the defaults, from the Setup dialog’s Limiter options, click Set defaults. The Limiters dialog appears:



To limit by publishing year, reading level, or interest level, choose Select and define the desired range. To limit searches by material type, select or clear the check boxes so only the material types you want to include are checked. Remember, the more restrictive you make the limiter options, the longer the response time is for search results.

Note: Limiters are ignored in Accelerated Reader, Reading Counts, Lexile, authority, call number, and category searches. Limiters set here have no effect in the visual interface.

In Union Catalog Plus, you can set the default search scope to one member's collection. Click the Libraries button and select the desired site from the list. The selected member name appears at the bottom of the main search window.



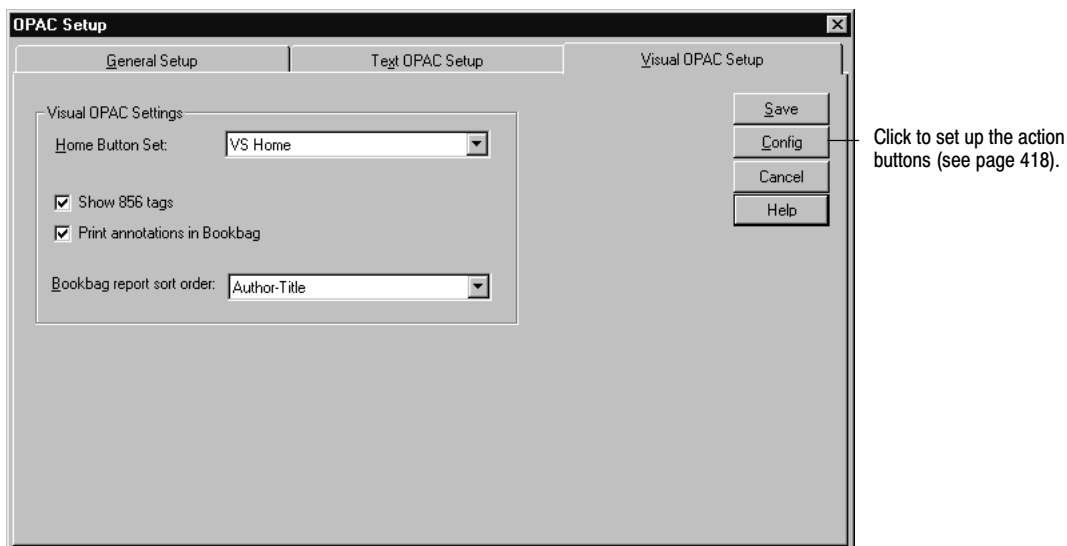
What's next?

Now that you have determined the search and limiter options, and set any default limiters, you can continue with the visual interface options. If you are not using the visual interface, you have completed your tasks in Setup. To save your settings and exit Setup, click Save.

If you exit Setup, please note that all of the settings on these three tabs apply only to the workstation you are now on. If you would like to copy these settings to your other search stations, see page 429.

Visual OPAC Setup tab

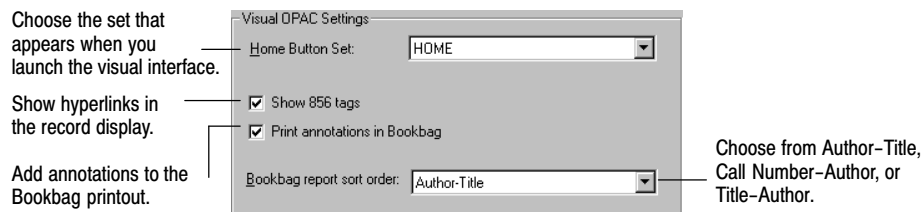
On the Visual OPAC Setup tab, you can: choose your home button set; decide whether or not to show hyperlinks in the record display; include annotations in the Bookbag printout; and select the Bookbag Report sort order. You also can access the button configuration dialog from this tab:



Choosing display options

The visual interface presents sets of graphical action buttons to the patron instead of a search text box and search buttons. The Home Button Set is the set of buttons that appears when the visual interface is launched, the station automatically resets, or the patron clicks the Home button in Navigation. It is the top level in a search hierarchy.

Until you choose to either load the default button set when prompted or create your own sets, the list contains only the name "HOME," which is the name of the default home set. After loading the default buttons or creating your own, it contains the names of all existing sets. You can choose any one to be the home set. Click the arrow next to the list and select the desired set. It can be changed at any time.



To show 856 tags (Electronic Location and Access) in the record display window, check the Show 856 tags check box. Any netLibrary eBooks, however, are not accessible in the visual interface.

Note: If you did not select the Disable access to other applications check box on the General Setup tab and your search station is Web-enabled, the hyperlinks function.

Selecting Bookbag options

To include, in the Bookbag printout, annotations (505a, 511a, 520a tags) from the MARC record, select the Print annotations in Bookbag check box. The annotations always appear in the record display window.

For the visual interface, you, not the patron, determine the Bookbag Report sort order. Choose from Author-Title, Call Number-Author, or Title-Author.

Saving your settings

To remove any changes you made to these settings, reverting to the previously saved ones, and return to the main window of OPAC in the interface selected in Workstation Setup on the General Setup tab, click Cancel.

To save any changes, close the Setup dialog, and return to the main window of OPAC in the interface you chose in Workstation Setup on the General Setup tab, click Save.

Importing the default buttons

When you select Visual OPAC Only or Let Patron Decide (and you have no action buttons defined yet), and click Save on any of the three Setup tabs, or Config on this one, a message asks if you want to import the default button set for Visual OPAC.












If you plan to use the visual interface or would just like to explore it, select Yes. The button set is added to your database. You can edit or delete any of these buttons later. See the table, below, for the default button configurations. If you choose No, you need to create and configure your own buttons and sets. See page 418 for instructions.

Note: Once you create an action button, you do not have the option of importing the default set.

Default button sets

There are over fifty default buttons that are pre-configured. That is, we have already set them up for you — naming them, selecting the picture, setting them to perform keyword or power searches, and organizing them into sets. All of the home set buttons have been configured to load another set of buttons. The buttons in the secondary sets perform bibliographic or keyword searches that should produce a list of results for patrons.

The table below outlines the default sets. You can see, for example, that, when clicked, the Famous People button loads a set (named Famous People) of buttons named Athletes, Heroes and Heroines, Inventors, and US Presidents. These four buttons, in turn, perform keyword searches on your collection.

| Home Set button | Secondary set buttons | Home Set button | Secondary set buttons |
|---|---|--|---|
| Animals:  | Bears Birds Cats Dinosaurs Dogs Horses | Insects: Insects Pets Pigs Rabbits Reptiles | History:  Exploration Pioneer life Native Americans |
| Award Winning:  | Caldecott Medal Newbery Medal | Holidays:  Christmas Halloween Jewish holidays Thanksgiving Day | |
| Famous People:  | Athletes Heroes and Heroines Inventors US Presidents | Reading Program:  None (If you create your own, there are button images in the WOPAC\ARTWORK folder for numbers 1-9) | |
| Folk and Fairy Tales:  | Dragons Nursery Rhymes Tall tales | Science:  Endangered species Experiments Minerals Oceanography Plants Rocks Solar system Weather | |
| Geography:  | Africa Antarctica Asia Australia Europe North America South America | Sports:  Baseball Basketball Football Soccer | |
| Find-It-All:  | Opens the Find-It-All Web page | | Tip: You can find these, and more, images in your CC40\WOPAC (or MOPAC)\ARTWORK folder. |

What's next?

If you choose to load the default button set when you click Save, you need go no further. You can use these buttons as is. When you exit Setup, open the visual interface. Check to see that all the searches are productive for your database, and determine your needs for any changes or additions.

Important: Make sure that your keyword index is up-to-date. You can generate keywords automatically whenever you save a bibliographic record by selecting the Create Keyword Entries as MARC Records are Saved option on the Misc tab under Cataloging setup (see page 55).

You can also build the keywords for new or modified records with the Update Keywords feature in Cataloging (see page 345) or regenerate the keywords for the entire library database by running the Rebuild Keyword utility in Utilities (see page 595).

If these buttons do not meet your needs, continue on to the next section to reconfigure them, or add new ones.

If you exit Setup, please note that all of the settings on these three tabs (except the action button configurations) apply only to the workstation you are now on. If you would like to copy these settings to your other search stations, see page 429.

If you plan to make the Visual interface available to your patrons through WebCollection Plus, make sure to open the Setup Information page and import the buttons. For more information about Visual WebCollection Plus, see page 447.

Adding and editing action buttons

To create your own action buttons or edit the default set, click Config on the Visual OPAC Setup tab. This opens the visual interface main window in Configuration (setup) mode.

This is the same window that the patrons see in Search mode, with two differences. "Configuration Mode" appears in the title bar and the toolbar contains setup buttons. Here you can add and edit the action buttons, organize them into sets, and see how they appear to the patron.

Click to add an action button to this set.

Click to end Configuration Mode and return to Search Mode.

Click a button to edit it.

If the button loads another set of buttons, right-click to edit it; left-click to load its set. On a Mac, hold down the **COMMAND** key while clicking to edit it.

Click a button to go back to that set.

If you chose to load the default buttons, you see the home button set in the window. If not, the “paper” is blank, allowing you to create your own buttons.

The action buttons are completely configurable. You can edit, delete, deactivate, or rearrange them. You can move them into different sets. You can create additional buttons for these sets or organize them into new sets.

A set is a group of buttons that displays at any one time and can contain up to 99 buttons. Since the window only holds about eight action buttons, you view the others in the set by clicking the left and right arrows.

There is no limit to the number of sets you can create. You then, on the Visual OPAC Setup tab, choose any set to be the home button set — the buttons that appear when you launch the visual interface or click Home in Navigation.

You can set up an action button to do one of several things:

- Open another application
- Launch the browser and open a specific Web page
- Perform a bibliographic search
- Perform a keyword search
- Load another set of action buttons to implement hierarchical searching
- Display the Type In Search window—a simplified version of the text OPAC

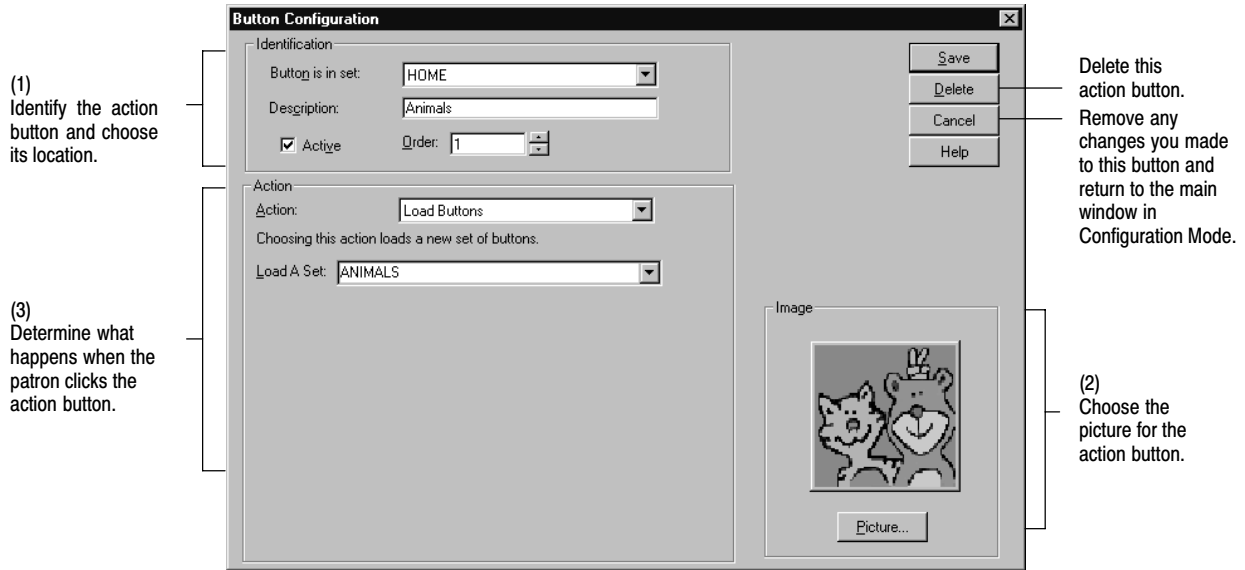
To configure a button, move to the set in which it resides (or will reside, if new). For example, if you want to change the Inventors button, click the Famous People button in the Home button set.

To add a new action button to the set, click the Add button on the toolbar. To edit an existing button, click the button itself. This opens the Button Configuration dialog.



Note: To edit an action button that loads another set of buttons, you must *right-click* it on a Windows computer. On Mac OS, hold down the **COMMAND** (open apple) key while clicking it. Otherwise, the set that it loads appears.

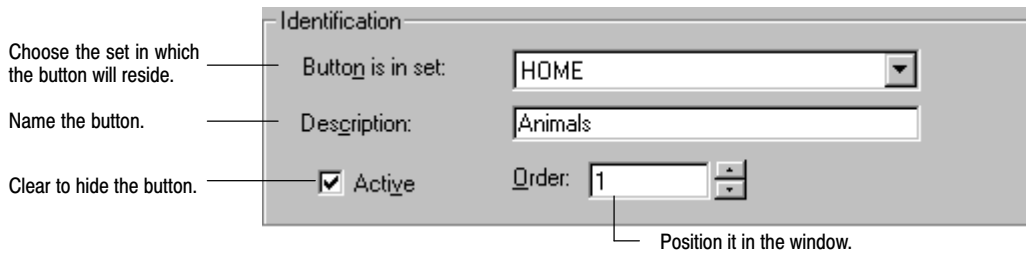
This image shows the configuration for the Animals button; for a new button, the fields contain the default settings:



The button configuration process is broken into three parts: Identification — naming and placing the button; Image — choosing its appearance; and Action — determining what it does.

Identifying the button

In the Identification box, enter the button’s name, and determine where the button appears:



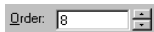
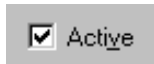
1. Assign the action button to a set from the Button is in set list. By default, the current set is selected. To change it, click the arrow and select another one from the list.

Example: You want to move the Geography button into the Science set. Click the Geography button in the Home button set. In its Button Configuration dialog, select Science from the Button is in set list and click Save.

2. Give the action button a Description (name). It appears under the button in the main window.

When working with buttons, there are a few things to remember:

- A button and a set can have the same name.
- A particular button resides in only one set (you could, manually, create a duplicate in another set).
- A set can contain up to 99 buttons.



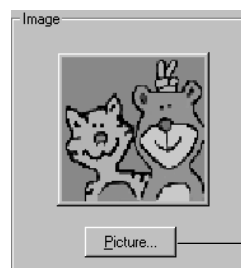
3. You can hide the action button by clearing the Active check box. The button still exists but does not display. Hiding a button is convenient for seasonal buttons (e.g., those producing a list of holiday or summer books) or for class-appropriateness. The remaining buttons shift over to fill the gap left by the inactive one. You can reactivate it at any time by checking the box.
4. Place the action button anywhere in the set by selecting the Order number. The buttons are numbered from left to right, top to bottom. By default, the first empty position appears. If you choose a number that has already been taken, the new button takes that position and the others shift down.

Example: If you choose to assign a button the number 3, the existing buttons, numbered 3 through 10, become numbers 4 through 11.

Associating an image with the button

You can select the image that appears on the action button. All of the default button images plus some extra ones are located in your CC40\WOPAC (or MOPAC)\ARTWORK folder.

Click Picture and browse to locate the image file. Double-click it to copy it onto the Button Configuration dialog.



Click to locate the image file.

Making the best image

You can create or obtain your own images. Any image or clip art with an acceptable format, color depth, and size can be used:

| Image Property | Valid specifications |
|----------------------|---|
| Windows file formats | JPEG File Interchange Format (*.jpg), PC Paintbrush (*.pcx), Tagged Image File Format (*.tif), and Windows Bitmap (*.bmp). |
| Mac file formats | Graphics Interchange (*.gif), JPEG/JFIF compliant (*.jif, *.jpg, *.jpeg), MacPaint painting (*.mac), Photoshop (R) file (*.psd), PICT (*.pct), Portable Network Graphics (*.png), QuickDraw GX image, QuickTime image file (*.qti), Silicon graphics image (*.sgi), Tagged Image File Format (*.tiff), Targa (*.tga), Windows Bitmap (*.bmp). |
| Colors | Only 8 bit (256 color) or 24 bit pictures are allowed (no 1-bit or 4-bit). |
| Size | No greater than 100K when converted to a bitmap (*.bmp). |

To best display them as action button icons, please note the following information:

The application converts the acceptable file types (see above table) into bitmaps. Even if your file is less than 100K, it may be larger than that when converted to a bitmap. If it is, you receive an error: "Error loading image file — buffer is too small." You must then reduce the size of your image or use another one. (The default button bitmaps are 7K.)

The application uses an image that is 80 pixels wide by 72 high. If your image is larger or smaller, it is stretched or contracted to fit. If its height/width ratio is different, the image may appear distorted.

To make the background of your image transparent, the background color must be a gray shade with color values of Red 136, Green 136, and Blue 136. If the foreground of your image has this color in it, that part of the image appears transparent when imported.

Tip: If you have a Windows workstation, you can use MS Paint to edit your images and clip art. To make the background transparent, go to Options | Edit colors and define a custom color by entering **136** in the Red, Green, and Blue text boxes. Fill the background with this color. After editing, save the file as a 256 color bitmap (*.bmp).

Important: For optimal speed and clarity, the color depth of your search station monitors should be greater than 256 (8-bit). Please see your operating system documentation for checking or changing this setting.

If you are creating new buttons on a Mac and the background is not transparent, you may need to set your monitor's color depth to 256 while you are in Setup.

Choosing the Action of the button

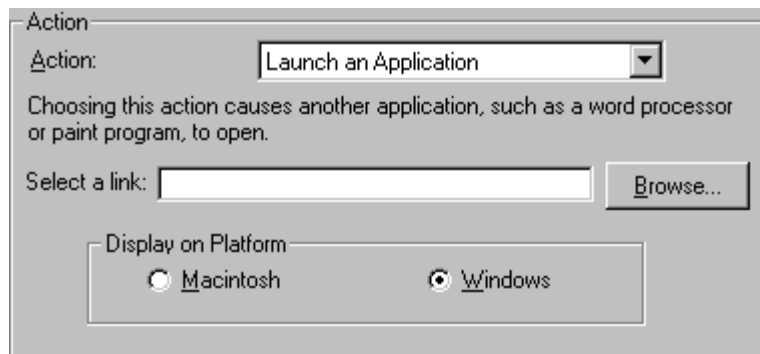
You can choose one of six actions that happen when the patron clicks the button. When you choose an action from the list, the Action box contents on this dialog change to show the applicable options.

Launch an Application

This action functions the same as the Tool Link option in the text interface. In the visual interface, however, the patron clicks an action button to open the link.

You can configure an action button to launch any application that's available to the search station. Enter the path and file name or click the Browse button to locate and select the desired executable file (*.exe).

Important: Because the button configurations are shared by all of your search stations, the path and name entered here must be valid at all of them.



The screenshot shows a dialog box titled "Action". At the top, there is a dropdown menu labeled "Action:" with "Launch an Application" selected. Below this, a line of text reads: "Choosing this action causes another application, such as a word processor or paint program, to open." Underneath is a text input field labeled "Select a link:" followed by a "Browse..." button. At the bottom, there is a section titled "Display on Platform" with two radio buttons: "Macintosh" (which is unselected) and "Windows" (which is selected).

The platform selection defaults to the workstation type you are now working on.

Important: If you have both Windows and Mac search stations, you must set up two buttons, one for each platform. You should set up the Mac button on a Mac and the Windows button on a Windows workstation. Only the appropriate button appears in the set at each search station.

If you choose this action and choose Disable access to other applications on the General Setup tab, the button is hidden from the patrons.

If you also have WebCollection Plus, please note that any buttons that you configure to launch an application are hidden in WebCollection Plus. Because patrons can use any Web-enabled computer to access WebCollection Plus, the path, availability, or name of the application may not be valid for them.

Link to a URL

If your search station is connected to the Internet, you can configure a button to launch your browser and open the Web page you specify in the text box. Enter the complete address (e.g., <http://www.fsc.follett.com>). Validate the address by clicking the button in the visual interface main window after setting it up.

If you choose this action and choose Disable access to other applications on the General Setup tab, the button is hidden from the patrons.



The screenshot shows a dialog box titled "Action". At the top, there is a dropdown menu labeled "Action:" with "Link to a URL" selected. Below this, a line of text reads: "Choosing this action causes your Internet browser to open and connect to the Internet site you enter here." Underneath is a text input field labeled "Enter a URL:" which is currently empty.

Tip: It's easiest to open the desired Web page on your browser, copy the address, and paste it here.

Example: Configure a button named NASA to open the NASA Kid's Space Web page by entering <http://www.nasa.gov/kids.html>.

Load Buttons

This action causes another set of buttons to display. You can use this action repeatedly to set up a search hierarchy. This allows the patron to move from a broad topic to a specific one, by delving through sets of buttons. When you choose this action, a list of all existing button sets appears.

Choose a set from the Load a Set list, or, enter a new, unique name. If you enter a new name, a new set is created with one non-configured button in it. You then configure that button and add any others that you want.

Important: When creating a new set, we recommend that the name you enter here in Load a Set be the same name that you entered above in Description.

The screenshot shows a configuration window for the 'Load Buttons' action. At the top, the 'Action' dropdown menu is selected and shows 'Load Buttons'. Below this, a descriptive text reads 'Choosing this action loads a new set of buttons.' At the bottom, the 'Load A Set' dropdown menu is selected and shows 'SCIENCE'.

When working with buttons, there are a few things to remember:

- Entering a new name here is the only way to create a new set.
- No two sets can have the same name.
- A button and a set *can* have the same name.
- You can load a particular set of buttons more than once.
- There is no limit to the number of sets you can create.

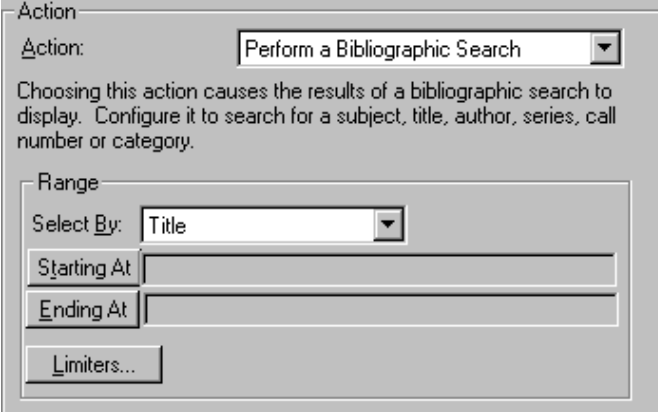
Example: Add a button to the Famous People set named Legendary Heroes. Configure it to Load a Set. Name the set Legendary Heroes and create new buttons (e.g., Norsemen, Greek Heroes, and Old West) in it. You can also create another Legendary Heroes button, in the Folk and Fairy Tales set, and configure it to load this same set.

Example: Configure buttons named Kindergarten, 1st Grade, 2nd Grade, etc., to load button sets. Configure the buttons in the new button sets to search for, or link to, grade-appropriate materials or sites. When a patron clicks a grade button, and then searches, he/she retrieves only appropriate information.

Perform a Bibliographic Search

If you choose this action, the Range selection options appear. Choose Title, Author, Subject, Series, Call Number, or Category. Define the range and apply

any limiters. Please see page 412 for instructions on setting limiters and page 470 for instructions on using them.



Action

Action: Perform a Bibliographic Search

Choosing this action causes the results of a bibliographic search to display. Configure it to search for a subject, title, author, series, call number or category.

Range

Select By: Title

Starting At

Ending At

Limiters...

Examples: Choose Select by Author and set both Starting At and Ending At to Hope, Laura Lee. When the patron clicks this action button, he/she gets a list of all items written by Laura Lee Hope.

In System Setup, create a category called Ms. Smith's Summer Reading List. In Cataloging, assign that category to the desired items. Configure this button to Select By Category, set Starting At and Ending At to Ms. Smith's Summer Reading List. The patron now has easy access to the items on the list. Please see page 52 for creating categories, and page 285 for assigning them to copies.

Perform a Keyword Search

If you choose this action, the power search dialog appears. You can either enter a single word or term, or set up a Power (Boolean) search. You can also set limiters for the search. Clicking the Clear Value button clears all three text boxes. Page 459

provides an explanation and examples of power searches, page 412 has instructions on setting limiters, and page 470, on using them.

Wildcards (? and *) can be used in a keyword search.

For more information on wildcards, see page 459.

Note: Any limiters set up on the Text OPAC Setup tab, or in the text interface’s Limiters dialog, have no effect when searching in the visual interface.

Show User Type In

You can configure a button to open a simplified type-in search window where patrons can enter a search word or term. By clearing the check boxes, you can limit the search buttons that appear in the window. You must leave at least one box checked. You can create multiple type-in buttons, giving each one different limiter settings.

See also: Please see page 412 for instructions on setting limiters and page 470 for instructions on using them.

Examples: Name a button “Movie Finder” and set the limiters to include only the Films material type, or name a button “3rd Grade Lookup” and set the limiters to include only Reading Level 3.0 to 3.9 materials.

Saving buttons

Clicking Save saves the configuration for this button and returns you to the visual interface main window, still in Configuration mode. The new button appears in its set immediately on your workstation.

Important: The button configurations are saved in the FairCom Server database, not, like the setup options, on the local workstation. All search stations, therefore, access the same button sets; you do not need to configure the buttons at each search station. You can configure at any workstation that has Catalog Plus installed.

If you make changes to the button configurations, it may take up to ten minutes for the changes to appear on the other search stations. For an immediate refresh, close and restart the OPACs.

Since the option of selecting the home set is on the Visual OPAC Setup tab (and, therefore, saved locally), you can select a different set to be the home set at each search station.

If you've made the Visual interface available to your patrons through WebCollection Plus, make sure to open the Setup Information page and re-import the buttons. For more information about Visual WebCollection Plus, see page 447.

Deleting buttons

To delete an action button, click Delete.

Note: If you want to delete a whole set of buttons, delete each button in the set before deleting the button that loads the set. This avoids the existence of "orphan" buttons — those still existing in the database, but inaccessible.

To remove any changes you made to this button's settings and revert to the previously saved ones, click Cancel. This also returns you to the visual interface main window in Configuration mode

There, you can click the Exit setup button to change the mode of the main window from Configuration to Search.

In Search mode, check to see that all of your action buttons perform as expected.



Putting it all together

There are many possibilities for configuring buttons and sets. You can create them to support your school's curriculum, draw attention to certain resources, or fill special needs or interests. In the example below, we demonstrate the creation and configuration of buttons to support the research efforts of a class focusing on space exploration. Keep in mind that these are only suggestions. You can configure the buttons and populate the sets in many different ways to best suit your patrons' needs and direct them to the resources available to them.

In the Home button set, click the Science button.
In the Science set, click Add to create a button. Name it Astronomy.

Configure the Astronomy button to load a set.
Name the set Astronomy. Since this is a new set name, a new set is created.
In that new set, create new buttons named Galaxies, Neutron stars & Black holes, and Space Exploration.

Configure the Space Exploration button to load a set.
Name the set Space Exploration. Since this is a new set name, a new set is created.
In that new set, create new buttons named Telescopes & Observatories, Space Stations, Satellites, and NASA.

Then configure the Space Stations button to perform a Subject search on Space stations. A patron can get a list of titles about space stations with only four clicks.

The screenshots illustrate the following configuration steps:

- HOME:** The 'Science' button is selected.
- SCIENCE:** An 'Add' button is used to create a new set named 'ASTRONOMY'.
- ASTRONOMY:** Three buttons are added: 'Galaxies', 'Neutron stars & Black holes', and 'Space Exploration'.
- SPACE EXPLORATION:** Four buttons are added: 'Telescopes & Observatories', 'Space Stations', 'Satellites', and 'NASA'.
- SEARCH RESULTS:** The 'Space Stations' button is clicked, resulting in a list of titles such as 'Artificial satellites: helpers in space' and 'Cities in the sky: a beginner's guide to living in space'.
- NAVIGATION:** The 'Navigation' pane shows the path taken: HOME > SCIENCE > ASTRONOMY > SPACE EXPLORATION.
- NASA KIDS WEB:** The 'NASA' button in the Space Exploration set is configured with a URL action pointing to <http://www.nasa.gov/kids.html>.

The patron can see his progression from a general topic to a specific one in Navigation, and can find his way back.

After saving your setup

Since the settings (except the Visual OPAC button configurations) are search station specific, if you need to make changes to the default settings, remember to set up each search station.

Setting up multiple search stations

You can copy the setup from one search station to another. If all your search stations will be identical but require a lot of changes to the default settings, this can save you some time.

Note: This option is not available for Mac OS search stations.

1. After saving your OPAC settings, use Windows Explorer or My Computer to open the search station's Windows folder.
2. Locate the FSC.INI file and copy it to a floppy disk or network drive.
3. At each search station, copy FSC.INI from the floppy disk or network drive to the Windows folder, replacing the search station's existing file.

Notes

Chapter 34 Setting up WebCollection Plus

After completing the WebCollection Plus installation and connecting it to the FairCom database(s) in the Administrator, you can run WebCollection Plus with its default settings. This chapter contains directions for the following:

- Accessing it on the Internet
- Setting up and using its optional features, including State Standards and WebPath Express
- Customizing your Web pages
- Using the English/French or English/Spanish versions

For installation, configuration, and troubleshooting information, please see the *WebCollection Plus Guide* (wcp.pdf) in the EXTRAS\MANUALS folder on the Follett Software CD.

Running WebCollection Plus



Services

WebCollection Plus starts and stops automatically whenever you start or shut down the Windows NT/2000 server on which it's installed. Because you don't need to log on to the server, you can leave WebCollection Plus running without making the NT/2000 server accessible to unauthorized individuals.

WebCollection Plus will start even if your FairCom Server is unavailable (that is, not started or being accessed in exclusive mode by Utilities). If your FairCom Server is unavailable, patrons will receive an error message when they attempt to search. However, WebCollection Plus continually attempts to contact your FairCom Server. As soon as the FairCom Server is available, a connection is made. You do not need to stop and restart WebCollection Plus to re-establish a connection.

Shutting down a connection to the FairCom Server

Some processes, such as Utilities, Restore, and Begin Inventory, require the exclusive use of a FairCom database. These processes cannot run if WebCollection Plus is connected to the FairCom database. You do *not*, however, have to stop the WebCollection Plus services. You only need to temporarily disconnect the Database Connector from the FairCom Server.

To disconnect it, either click the Shut Down button on the Setup Information page, or, from the Administrator module, click Stop next to the appropriate site.

When the process requiring the exclusive use finishes, click Start Up on the Setup Information page, or Start in the Administrator module.

Accessing WebCollection Plus

Constructing the URL for the main page

Once you've started the WebCollection Plus services, you can access the main Library Search page by entering the name or IP address of your server followed by **/webopac/main**, a question mark (?), **siteid=**, and the correct Site ID in the Location or Address text box of your Web browser.

Examples: <http://192.168.0.1/webopac/main?siteid=smithhs>
<http://www.myserver.edu/webopac/main?siteid=smithhs>

If you entered a different port number during installation, insert a colon (:) and the port number after the IP address.

Example: <http://192.168.0.1:4000/webopac/main?siteid=smithhs>

Your patrons will need this complete address to access WebCollection Plus. If you have established a Web page for your school, you can create a link from it to WebCollection Plus.

Type the URL in the address box of your browser and press Enter. The main page of WebCollection Plus appears. To test the connection to the FairCom database, enter a search word in the text box, and click the Title icon. You should see a list of results.

Constructing the URL for the Setup Information page

To access the Setup Information page, in the Location or Address text box, substitute "config" for "main" in the address.

Examples: <http://192.168.0.1/webopac/config?siteid=smithhs>
<http://www.myserver.edu/webopac/config?siteid=smithhs>

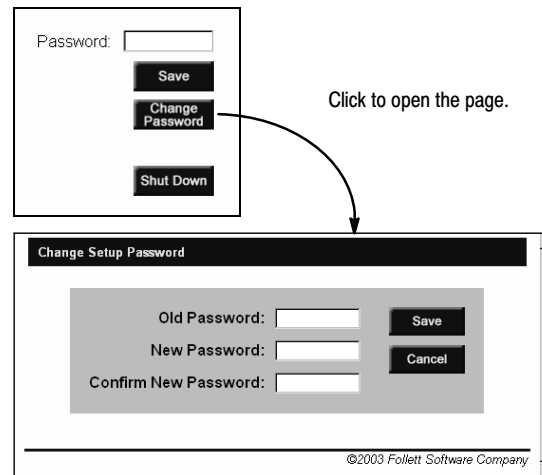
Changing the setup password

Defining a Setup password (by default **MAKEITSO**) prevents patrons (or any visitor) from changing the settings or password on the Setup pages. To change or delete it, click Change Password on the Setup Information page.

On the Change Setup Password page, enter your preferred password; use up to 10 alphanumeric characters. Asterisks mask the password as you type; you must type it again for verification. Then click Save.

If you prefer to save your setup preferences without entering a password, enter the default password in the Old Password text box, enter nothing in the other two, and click Save. However, we strongly recommend the use of passwords.

Warning: If you clear the password, it then becomes possible for *anyone* accessing the Setup Information page to define a new password.



A note about browser settings

WebCollection Plus requires a few of the optional settings available in many browsers. In order for your patrons to open and use its Web pages, please make sure that JavaScript, cascading style sheets, and cookies are enabled.

JavaScript is a World Wide Web scripting language—an extension of HTML. It allows WebCollection Plus to include functionality, not just static display, in its Web pages.

Cascading style sheets (CSS) act as templates that control the formatting of the WebCollection Plus Web pages. They specify particulars such as font types and sizes, and background colors.

A cookie is a file that the server for a Web application (like WebCollection Plus) writes to your hard drive. It stores your user preferences, as well as pages and graphics so that the server does not have to resend them.

WebCollection Plus uses a cookie file to store the following information:

- The contents of the Bookbag
- The Limiters preferences of the user
- The preferred language of the user, if you have WebCollection Plus for English/French or English/Spanish

By default, cookies are enabled. If you did not disable cookies when you installed your browser, you do not need to change the setting.

The Setup Information page

The WebCollection Plus Setup Information page provides numerous options that let you tailor your Web OPAC to accommodate your patrons' needs.

Important: Starting with version 5.10, you must enter a password to save any changes on the setup pages. By default, this password is **MAKEITSO**. To change or eliminate the password, see page 432.

When you enter the URL (see page 432), the Setup Information page appears (for WebCollection Plus for Union, see page 435):

The screenshot shows the 'Setup Information - Washington Elementary School' page with several sections:

- Appearance:** Includes fields for 'Display Site Name' (English: Welcome), 'Display Announcement' (English:), 'Display Footer' (URL: and English Text:), and 'Use Custom Graphics' (Edit Graphics button).
- Information Access:** Includes checkboxes for 'Enable Events Page', 'Enable Information Page', 'Enable Web Links Page', and 'Enable QuickLinks' (with an 'Edit QuickLinks' button).
- Default Record Display:** Includes checkboxes for 'Include Interest Level', 'Include Reading Level', and 'Include Review Sources'.
- Follett eBooks:** Includes radio buttons for 'Use IP Authentication' and 'Use Password Authentication'.
- Tools and Services:** Includes a checked checkbox for 'Enable Bookbag' with a 'Limit (1 - 150): 100' field and an 'Edit Toolbar' button.
- Visual Setup:** Includes checkboxes for 'Show 856 Tags' and 'Print Annotations in Bookbag', a 'Bookbag Report Sort Order' dropdown (set to 'none'), and a 'Home Button Set' dropdown (set to 'none') with an 'Import Buttons' button.
- E-mail Requests:** Includes fields for 'Outgoing Mail Server' (Example: smtp.myschool.edu), 'Sender's E-mail Address' (radio buttons for 'Not Required', 'Require Patron To Enter', and 'Use Default If Left Blank'), and checkboxes for 'Allow Hold Requests and Send E-mails to:' and 'Allow ILL Requests and Send E-mails to:'.
- Integrate with State Standards and WebPath Express:** Includes checked checkboxes for 'State Standards' and 'WebPath Express', and a 'WebCollection URL:' field (Example: http://www.myschool.edu/webopac/main?siteid=elem).
- Bottom:** Includes a 'Password:' field and buttons for 'Save', 'Change Password', and 'Shut Down'.

Callout boxes provide additional instructions:

- 'To personalize the text and graphics, see page 436.' (points to Appearance section)
- 'To enable email requests for holds and interlibrary loans, see page 440.' (points to E-mail Requests section)
- 'If you have a subscription to State Standards or WebPath Express, select the appropriate check box(es) to add the search button to the toolbar... and enter your URL.' (points to Integrate with State Standards and WebPath Express section)
- 'To make these additional Web pages available, see page 450.' (points to Information Access section)
- 'To create a drop-down list of Web links for the toolbar, see page 448.' (points to Enable QuickLinks)
- 'To include these notes in the title information, select the appropriate check box.' (points to Default Record Display section)
- 'To allow patrons to view Follett eBooks, see page 449.' (points to Follett eBooks section)
- 'To let patrons create a bibliography, see page 439.' (points to Enable Bookbag)
- 'To customize the toolbar, see page 438.' (points to Edit Toolbar button)
- 'To set up Visual WebCollection Plus, see page 447. (This feature is not available for WebCollection Plus for Union.)' (points to Visual Setup section)
- 'To change or eliminate the password, see page 432.' (points to Password field)
- 'To temporarily disconnect from—and reconnect to—the FairCom Server, when another process requires exclusive use of the database, see page 431.' (points to Shut Down button)

When you complete your changes on the Setup Information page, enter your password if necessary, and click Save.

Important: Before you click any of the buttons (Import Buttons, Edit Graphics, Edit QuickLinks, Edit Toolbar) that take you to another page, enter your password if necessary, and click Save to preserve the settings you changed on this page.

WebCollection Plus For English/French or English/Spanish: There are several additional language-specific options. See page 454 for more information.

For WebCollection Plus for Union

You have some additional options for your member sites on the Setup Information page:

Setup Information - School District 100

| | |
|--|---|
| <p>Appearance</p> <p><input checked="" type="checkbox"/> Display Union Name English: <input type="text" value="Welcome"/></p> <p><input type="checkbox"/> Display Announcement English: <input type="text"/></p> <p><input type="checkbox"/> Display Footer URL: <input type="text"/> English Text: <input type="text"/></p> <p><input type="checkbox"/> Use Custom Graphics <input type="button" value="Edit Graphics"/></p> | <p>Information Access</p> <p><input type="checkbox"/> Enable Events Page <input type="checkbox"/> Enable Information Page <input type="checkbox"/> Enable Web Links Page</p> <p><input type="checkbox"/> Enable QuickLinks <input type="button" value="Edit QuickLinks"/></p> |
| <p>E-mail Requests</p> <p>Outgoing Mail Server <input type="text"/> <small>Example: smtp.myschool.edu</small></p> <p>Sender's E-mail Address</p> <p><input checked="" type="radio"/> Not Required <input type="radio"/> Require Patron To Enter <input type="radio"/> Use Default If Left Blank: <input type="text"/> <small>Example: name@myschool.edu</small></p> | <p>Default Record Display</p> <p><input checked="" type="checkbox"/> Include Interest Level <input checked="" type="checkbox"/> Include Reading Level <input checked="" type="checkbox"/> Include Review Sources</p> |
| | <p>Follett eBooks</p> <p><input checked="" type="radio"/> Use IP Authentication <input type="radio"/> Use Password Authentication: <input type="text"/></p> |
| | <p>Tools and Services</p> <p><input checked="" type="checkbox"/> Enable Bookbag Limit (1 - 150): <input type="text" value="100"/> <input type="button" value="Edit Toolbar"/></p> |
| | <p>Member Information <input type="button" value="Edit Members"/></p> |

Password:

To access your list of members, enable hold and interlibrary loan email requests and enter their site URLs so that users can check an item's availability (see pages 441 and 445).

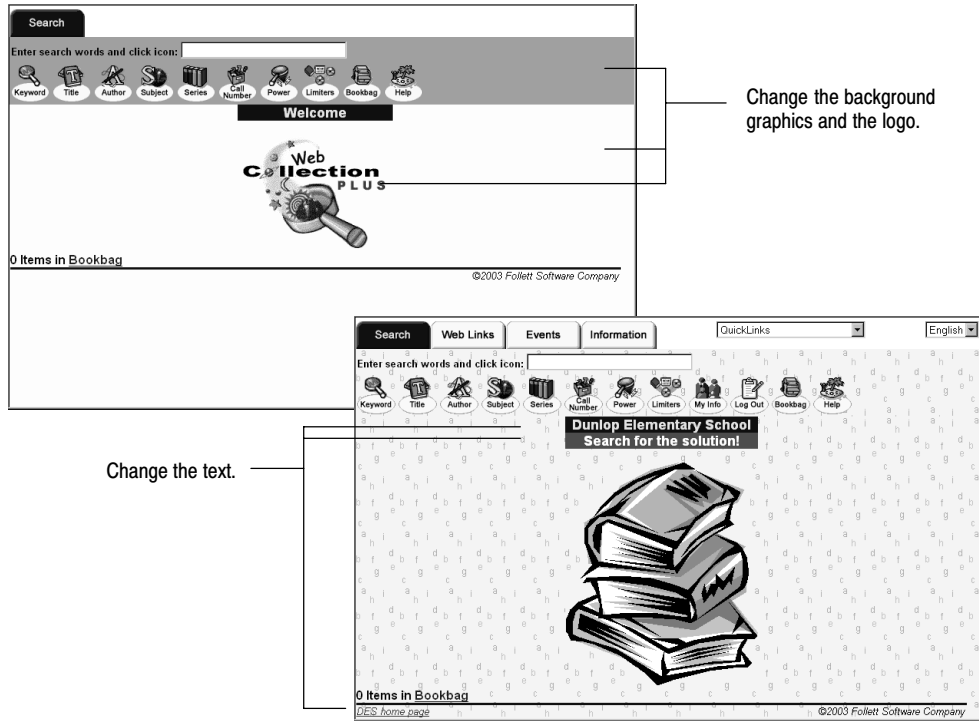
Every member defined in Union System Setup automatically appears in the Member Information section. Use the options next to each member's name to enable their services:

- Choose to allow Hold and ILL email requests (see page 441)
- Choose to allow patrons to retrieve a copy's availability (see page 445)

In addition, you can group your member catalogs to make it easier for patrons to search a portion of the union catalog (see page 439). For information on creating groups in Union System Setup, see page 101.

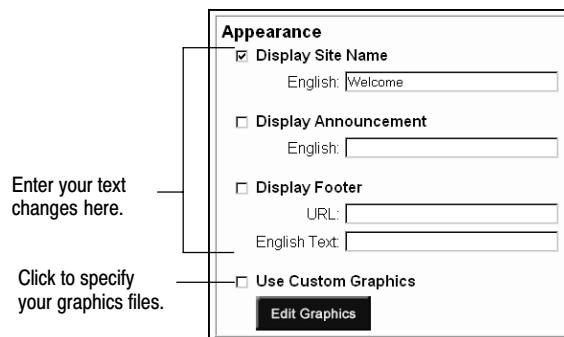
Customizing the appearance of the pages

WebCollection Plus lets you personalize some of the text and graphics elements on the home and search pages:



Changing the text on the main page

You can change the text that appears on the first page and on the footer that appears throughout the application.



- The information in the Display Site (or Union) Name text box appears on the first page and in the Web browser's title bar. By default, WebCollection Plus displays WELCOME. To change the default name, just enter your institution's name and make certain the check box is selected. If you don't

want to display this information, clear the Display Site (or Union) Name check box.

- The Display Announcement option lets you show a short message (up to 100 characters) on the first page. This lets you alert your patrons to important events, such as library or school closings, or to remind them to return checked-out items prior to vacations or holidays.

To set up an announcement, select the Display Announcement check box and enter your message in the text box. If you don't want to display this information, clear the Display Announcement check box.

- The Display Footer option lets you add a custom message (up to 100 characters) to the bottom of each page. The footer can be a simple message or a hyperlink.

To set up a footer, select the Display Footer check box and enter a message in the Text field. To make the message a hyperlink, enter an Internet address or an internal path in the URL text box. If you enter an Internet address, you must include the protocol (e.g., "http://").

Changing the graphics

If you'd like to select your own background graphics for the pages or add your own logo on the first page, you *first* need to copy the new graphics files into the POLARIS\WWWROOT\WR\USER\

Note: To ensure that the images you use will be compatible with all browsers and are supported by the Web standard, we strongly recommend that your graphics be in either the .jpg, .gif, or png file format. In addition, do not use spaces in your graphic file name. For example, "birchtree.gif" will appear, but "birch tree.gif" will not.

Once you place your graphics in the folder, select the Use Custom Graphics check box (under Appearance) and click the Edit Graphics button. The Custom Graphics setup page appears:

Sets the background image of the toolbar for the search page.

Sets the background image for the main frame of the main page. The Information, Web Links, and help pages are not affected.

Sets the image that appears in the middle of the first page.

Sets the background image of the toolbar for the search page.

Use Custom Graphics - Sunnydale Elementary School

Copy the graphics file into the /wrr/user/SunnydaleES/ folder under your library's WebCollection Plus installation, and then enter the name of the file in the appropriate text field.

Toolbar Background:

Main Background:

Logo:

Password:

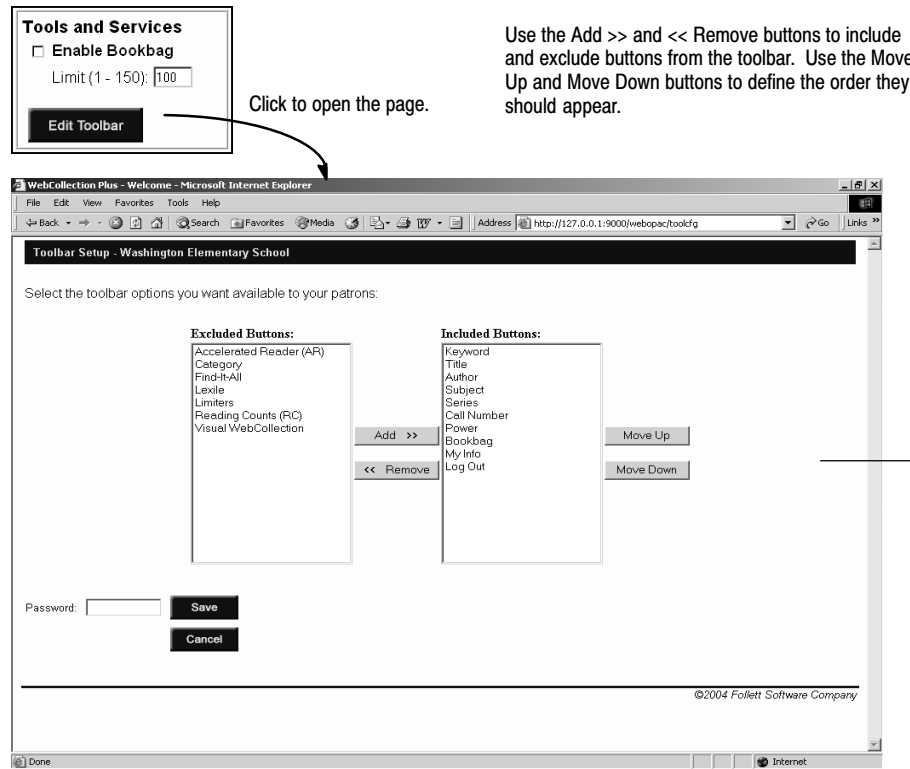
Once you specify the images you want to use, enter your password if necessary, and click Save.

To disable this feature, clear the Use Custom Graphics check box on the Setup Information page, enter your password if necessary, and click Save. Once you do so, the default graphics appear on the pages. So that you can quickly re-enable them, any graphics file names you entered on this Custom Graphics Setup page remain in the text boxes.

Providing tools and services for your patrons

Configuring the toolbar

You determine what searches and tools are available by defining what buttons appear on the toolbar. To edit the toolbar, click the Edit Toolbar button (under Tools and Services). The Toolbar Setup page appears:



Select the options you want to include (the Help button is always available), then enter your password if necessary, and click Save.

Note: If you enable Patron Empowerment on the System Setup | Setup | Patron Maintenance | Patron Defaults tab, the My Info and the Logout buttons automatically appear on the WebCollection Plus toolbar. These buttons can be reordered, but cannot be excluded.

Important: If you select more buttons than can be displayed, some won't be accessible. For example, a monitor with a screen resolution of 640 by 480 pixels can display only thirteen buttons.

For WebCollection Plus for Union: The Category search option and Visual WebCollection are not available.

The Limiters dialog contains a “Libraries to be searched” section that allows patrons to select the collections to search—the entire union catalog, one of the member catalogs, or a predetermined group of catalogs. To group your member catalogs in Union System Setup, see page 101.

Libraries to be searched

All Libraries

Specific Group

Specific Library



Toolbar buttons for Patron Empowerment

If you enable Patron Empowerment on the System Setup | Setup | Patron Maintenance | Patron Defaults tab, the My Info and the Logout buttons automatically appear on the WebCollection Plus toolbar, and the Place Hold/Reserve button appears on the Title Information page. For further information, see the Patron Empowerment section on page 445.



Enabling the Bookbag

The Bookbag option lets patrons create a bibliography of the items that interest them. If you want to let your patrons build bibliographies, select the Enable Bookbag check box (under Tools and Services) on the Setup Information page; its toolbar button is then selected automatically. If the check box is cleared, the Bookbag is not accessible.

Tools and Services

Enable Bookbag

Limit (1 - 150):

You can limit the size of a patron’s Bookbag by entering the maximum number of entries (up to 150) in the text box. The Bookbag does not empty automatically. The patron must click the Remove All button in the Bookbag. A counter on most pages displays the number of items in the Bookbag.

To print, save, or mail a Bookbag, the patron can open the printer friendly version, and then use the browser’s menu commands or toolbar buttons.

Important: WebCollection Plus uses a browser cookie file to store the contents of the Bookbag. By default, all browsers accept cookies. If you’ll be using WebCollection Plus on internal search stations and want to use the Bookbag, make certain that no one has changed this option.

Setting up hold and interlibrary loan request options

The Allow Hold Requests and Allow ILL (InterLibrary Loan) Requests options let your patrons and associated libraries submit requests via email. If you want to allow your patrons to place actual holds and reserves, see the Patron Empowerment section on page 445.

E-mail Requests

Outgoing Mail Server

 Example: smtp.myschool.edu

Sender's E-mail Address
 Not Required
 Require Patron To Enter
 Use Default If Left Blank:

 Example: name@myschool.edu

Allow Hold Requests and Send E-mails to:

Allow ILL Requests and Send E-mails to:

Important: Since the request forms are not password protected, unqualified individuals can submit requests. For security purposes, these requests do not touch your library's database. Instead, they simply supply the information needed to process the request.

1. Under Email Requests, in the Outgoing Mail Server text box, enter the name of your mail server (for example, smtp.washington.edu).
2. Choose whether or not the patrons must include their email address.
 - Select Not Required if you (the library administrator) do not require the patron's email address *and* your SMTP mail server does not require a sender's email address. (Some SMTP mail servers reject incoming email messages that don't include a return email address.)
 - Select Require Patron To Enter if you *do* require the patron's email address.
 - Select Use Default If Left Blank if you do *not* require the patron's email address but your SMTP mail server *does*. Then enter an appropriate default address in the text box.
3. To allow hold or interlibrary loan requests, select the appropriate check boxes and enter the email addresses for the requests (for example, librarian@washington.edu).

For WebCollection Plus for Union

Union catalogs can choose to allow Hold and ILL requests for each member catalog. Click Edit Members in the Member Information box. The Member Information list appears:

The screenshot shows a web interface titled "Member Information - Fellowship Union Catalog". At the top, there is a "Member Information" box with an "Edit Members" button. An arrow points from this button to the main page. Below the title bar, there is a "Password:" field with a "Save" button and a "Cancel" button. The main content area is a table listing four schools: Coyle Elementary School, Gedzyk Grammer School, Iden Elementary School, and Merio Middle School. Each school entry has a "WebCollection URL:" field, two checkboxes labeled "Allow Holds" and "Allow ILLs", and a "Send E-mail Requests to:" field. An arrow points from the text "Select the check boxes for email requests for each member, and enter their email address." to the checkboxes and email field of the first school entry.

To allow patrons to email requests to the member, select one or both check boxes. Then enter the member's email address. This entry places an Email Request button next to the member's copies on the Copy Information page.

To disable hold or interlibrary loan requests, clear the appropriate check boxes.

Important: Before you allow holds and ILLs on the Member Information page, you must *first* define and save your Outgoing Mail Server on the Setup Information page.

Customizing the hold and interlibrary loan request forms

Since every library's rules regarding who may request a hold or interlibrary loan vary to some degree, WebCollection Plus lets you edit the instructions that appear on the request forms.

The text files for the hold (hold.txt) and interlibrary loan (ill.txt) instructions are located in the POLARIS\WWWROOT\WR\USER\\ENGLISH folder. You can use any text editor to edit the request forms' instructions. Make sure to save the file with a ".txt" extension on the file name.

Hold Request Form

Please complete the form below to request a hold.

Library: Gedzyk Grammer School
 Title: Lou Gehrig : one of Baseball's greatest.
 Author: Van Ripper, Guernsey, 1909-
 Call Number: 796.357 VAN

Your Name: (required)
 Barcode/ID:
 Your E-Mail Address:
 Date Needed:

Comments:

Interlibrary Loan Request Form

Please complete the form below to request an interlibrary loan.

Library: Gedzyk Grammer School
 Title: Lou Gehrig : one of Baseball's greatest.
 Author: Van Ripper, Guernsey, 1909-
 Call Number: 796.357 VAN

Requesting Library: (required)
 Name: (required)
 Your E-Mail Address:
 Phone Number:
 Date Needed:

Comments:

This text is customizable. Edit the file hold.txt.

To send the hold request, a name is required.

An email address lets the mail server notify the sender of any problems delivering the request.

This text is customizable. Edit the file ill.txt.

An interlibrary loan request requires the names of the library and of the individual requesting the loan.

For WebCollection Plus For English/French or English/Spanish: You can edit both the English and French (or Spanish) instructions. The French (or Spanish) versions of these instructions are located in POLARIS\WWWROOT\WR\USER\\FRENCH (or SPANISH).

For WebCollection Plus for Union: The same instructions appear on the request forms for every member library. You can not individualize them.

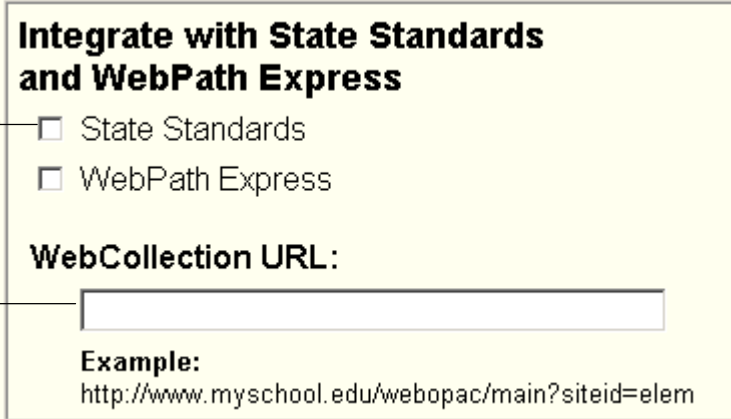
Setting up WebCollection Plus for State Standards

If you have a subscription to State Standards, once you've installed or updated your WebCollection Plus, you'll need to configure it for State Standards:

1. Open the WebCollection Plus Setup Information page.
(Substitute "config" for "main" in your WebCollection Plus URL.)

Examples: <http://192.168.0.1/webopac/config?siteid=smithhs>
<http://www.myserver.edu/webopac/config?siteid=smithhs>

2. Scroll to the Integrate with State Standards and WebPath Express box.



Select this check box,

and enter your URL.

Integrate with State Standards and WebPath Express

State Standards

WebPath Express

WebCollection URL:

Example:
<http://www.myschool.edu/webopac/main?siteid=elem>

3. Select the State Standards check box.
4. Enter the URL that takes your patrons to the main page of your WebCollection Plus.
Make sure to include the protocol (e.g., http) and the "main?siteid=..." at the end.
5. Enter your password, if any, and click Save. This automatically adds the State Standards button to the toolbar.

Important: Make sure, also, that your browser accepts third-party cookies. The State Standards service uses these to retain your search settings. Changing browser settings varies from browser to browser, so refer to the browser's online help for instructions.

Setting up WebCollection Plus for Keyword/Power and Browse searches

If you have a subscription to WebPath Express, once you've installed or updated your WebCollection Plus, you'll need to configure it for WebPath Express:

1. Open the WebCollection Plus Setup Information page.
(Substitute "config" for "main" in your WebCollection Plus URL.)

Examples: <http://192.168.0.1/webopac/config?siteid=smithhs>
<http://www.myserver.edu/webopac/config?siteid=smithhs>

2. Scroll to the Integrate with State Standards and WebPath Express box.

Select this check box,

and enter your URL.

Integrate with State Standards and WebPath Express

State Standards

WebPath Express

WebCollection URL:

Example:
<http://www.myschool.edu/webopac/main?siteid=elem>

3. Select the WebPath Express check box.
4. Enter the URL that takes your patrons to the main page of your WebCollection Plus. Make sure to include the protocol (e.g., http) and the "main?siteid=..." at the end.
5. Enter your password, if any, and click Save.

Checking a copy's status from WebCollection Plus for Union

If any of your union catalog members are running WebCollection Plus, your patrons can find out if a copy is available. Open the Member Information page by clicking Edit Members. On the Member Information page, enter each member's complete URL in their WebCollection URL text box. This places an Availability button next to that member's copies on the Copy Information page. When clicked, it displays the copy's Call Number, Status, Sub Location, and Description (if available). Make sure to enter the full URL, including "http://".

Note: Your member catalogs can be running *any* version of WebCollection Plus.

Member Information

Edit Members

Click to open the page.

Member Information - Fellowship Union Catalog

Password: Save Cancel

| | | |
|--------------------------------------|-------------------------------------|---|
| Coyle Elementary School | WebCollection URL: | <input type="text"/> |
| <input type="checkbox"/> Allow Holds | <input type="checkbox"/> Allow ILLs | Send E-mail Requests to: <input type="text"/> |
| Gedzyk Grammer School | WebCollection URL: | <input type="text"/> |
| <input type="checkbox"/> Allow Holds | <input type="checkbox"/> Allow ILLs | Send E-mail Requests to: <input type="text"/> |
| Iden Elementary School | WebCollection URL: | <input type="text"/> |
| <input type="checkbox"/> Allow Holds | <input type="checkbox"/> Allow ILLs | Send E-mail Requests to: <input type="text"/> |
| Merlo Middle School | WebCollection URL: | <input type="text"/> |
| <input type="checkbox"/> Allow Holds | <input type="checkbox"/> Allow ILLs | Send E-mail Requests to: <input type="text"/> |

Enter the complete URL of the member's WebCollection Plus.



Enabling Patron Empowerment

You can allow your patrons to log in to WebCollection Plus. You can choose to allow them to view and print a list of their checkouts, fines, and holds, or to place actual holds and reserves, or do both.

There are no options on the Setup Information pages for Patron Empowerment. To enable Patron Empowerment in WebCollection Plus, you must select it on the System Setup | Setup | Patron Maintenance | Patron Defaults tab. In the Allow Patrons to Log in list, choose OPAC & WebCollection Plus, or WebCollection Plus Only. Make sure to choose the password field and the feature(s) allowed, and to distribute the passwords to your patrons.

Once you enable this feature in System Setup, WebCollection Plus automatically adds the My Info and Log Out buttons to its toolbar, and a Place Hold/Reserve button to the Title Information page.

While the Login dialog is almost identical to that in OPAC, the Patron Information page has a different format—a list instead of a tabbed dialog:

For privacy, only the patron's name and card expiration date appear at the top.

Pending,

and assessed fines appear.

Patrons can check the status of their holds and reserves.

Library Search
Enter search words: _____
Keyword Title Author Subject Series Call Number Category Power Limiters My Info Log Out Bookbag Help

Patron Information Printer-friendly

Patron
Name: Freedman, Sally J. Card Expiration: 06/30/2005

Checkouts

| Title | Call Number | Barcode | Due Date | Pending Fine | Price |
|--------------------------|-------------|---------|------------|----------------|--------|
| Margaret and I, a novel. | 813.5 WIL | T 57100 | 11/15/2002 | Overdue \$0.70 | \$0.00 |
| The book of nothing | 513 BAR | T 57098 | 12/02/2002 | | \$0.00 |
| Freddie Q. Freckle | E MES | T 57097 | 12/02/2002 | | \$0.00 |

Note: As of today, you have a total of \$0.70 in pending overdue fines. Items returned after today will increase your fine.

Fines

| Title | Call Number | Barcode | Amount Due |
|-----------------|-------------|---------|----------------|
| Copying charge | | | \$0.80 |
| The friendship | F TAY | T 11666 | Overdue \$0.60 |
| A jar of dreams | F UCH | T 9155 | Overdue \$0.60 |

Holds/Reserves

| Title | Call Number | Placed On | Expires | Status |
|----------------------------|-------------|-----------|------------|----------|
| I love you, Blue Kangaroo! | | Any | 12/05/2002 | Ready |
| The story of Muhammad Ali | | Any | 12/09/2002 | Pending |
| The wonder of whales | | Any | 12/09/2002 | Pending |
| Wild about fudge | 641.6 MYE | Copy | 12/20/2002 | Reserved |

Key: [Icon] = Damaged [Icon] = Lost [Icon] = Overdue [Icon] = Refund

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Like the Bookbag, clicking the Printer Friendly button produces a black on white text version of the patron information for printing, saving, or mailing.

To protect your patrons' privacy, there is an inactivity timeout of five minutes. This timeout is not configurable. WebCollection Plus logs the patron out if there is no activity (mouse movement or keyboard entry) on the Login, My Info, or New Hold/Reserve page for five minutes. Patrons are allowed to log back in any number of times.

See also: To learn more about setting up Patron Empowerment, see "Empowering your patrons" on page 74. To learn more about using it, see "Patron empowerment" on page 472 in the chapter, "Using your OPAC."

For WebCollection Plus for Union: This feature is not available.

Setting up Visual WebCollection Plus

To make the Visual OPAC interface available to your patrons in WebCollection Plus, select the check box for its toolbar button on the Toolbar Setup page (see page 438). Then, on the Setup Information page, you have the same options in WebCollection Plus as in your regular OPAC.

Important: To move between the Visual WebCollection button sets, do *not* use your browser's Back button. Instead, use the Navigation buttons on the right. Using the Back button may cause the wrong page to appear.

Visual Setup

Show 856 Tags

Show Annotations in Bookbag

Bookbag Sort Order:

Call Number - Author

Home Button Set:

home

Import Buttons

To enable the other controls, import your buttons first.

- You must first click Import Buttons the first time you choose to use Visual WebCollection Plus. Then, whenever you make any changes to the buttons in OPAC Setup, you'll need to re-import the buttons.

Before you can use Visual WebCollection, you must have already loaded or created the buttons in your regular OPAC. For instructions, see page 415.

Note: Any buttons that are configured to launch an application are hidden in Visual WebCollection. Because patrons can use any Web-enabled computer to access WebCollection Plus, the path, availability, or name of the application may not be valid for them.

- To show any 856 tags (Electronic Location and Access) on the Title Information page, select the Show 856 tags check box.
- To include annotations (tags 505a, 511a, and 520a) from the MARC record in the Bookbag, select the Show annotations in Bookbag check box.
- For Visual WebCollection Plus, you, not the patron, determine the Bookbag sort order. Choose from Author-Title, Call Number-Author, or Title-Author.
- The Home Button Set is the set of buttons that appears when the patron clicks the Visual toolbar button, or the Home button in Navigation. The list contains the names of all existing sets. Choose any one to be the home set.

Note: When patrons access Visual WebCollection with a Netscape 4.7 browser, there are two slight differences in functionality:

- To open a title information page from the search results list, the patron must click on the title hyperlink; the whole entry is not a clickable button.
- To remove one title from the Bookbag, the patron must click the Remove button adjacent to the title; there is no Remove One button.

For WebCollection Plus for Union: This feature is not available.

Providing more information access for your patrons



Accessing TitlePeek

There are no options on the Setup Information pages for enabling TitlePeek. Once you select the check box that enables TitlePeek on the System Setup | Setup | Cataloging | Misc tab, the TitlePeek button appears on the Title Information page. It appears, however, only when the title’s record contains an ISBN *and* information is available for the title *and* you have a subscription to TitlePeek.

The button appears as either a cover image of the book (if available) or a blue-and-white TitlePeek square. Clicking this button displays additional information about the title. This may include the large cover image, table of contents, an excerpt, publisher’s summary, author notes, and journal reviews. This service allows your patrons to “browse the shelves” from outside the library and can assist them in the assessment of the title’s readability and contents.

Setting up QuickLinks

QuickLinks lets you easily enter up to fifteen hyperlinks that can be selected from a drop-down list above the search page’s toolbar. These links can point to any site, internal or Internet, that you deem useful to your patrons.

To set up QuickLinks, click the Edit QuickLinks button. The QuickLinks Setup page appears:

The screenshot shows a web interface. On the left, a box titled 'Information Access' contains four checkboxes: 'Enable Events Page', 'Enable Information Page', 'Enable Web Links Page', and 'Enable QuickLinks'. The 'Enable QuickLinks' checkbox is checked. Below it is a button labeled 'Edit QuickLinks'. An arrow points from this button to a larger window titled 'QuickLinks Setup - Iden Middle School'. This window contains a text prompt: 'Enter the name and URL (e.g., http://www.yoursite.com/) for your QuickLinks'. Below the prompt are ten rows, each with a 'Name:' label and an input field, followed by a 'URL:' label and an input field.

Enter a name and a complete URL for each link that you want to add. The name appears in the drop-down list. The URL must be the complete Internet site address, including “http://”. When you are finished, enter your password if necessary, and click Save.

Then, before you leave the Setup Information page, select the Enable QuickLinks check box, enter your password if necessary, and click Save.

To disable this feature, clear the Enable QuickLinks check box, enter your password if necessary, and click Save. If this box isn't checked, the drop-down list won't appear. Any links you have set up remain on the QuickLink Setup page.

Modifying the record display

These options determine how much of the MARC record is visible when title information is displayed within WebCollection Plus:

Default Record Display

Include Interest Level

Include Reading Level

Include Review Sources

To include interest or reading grade level notes (521 tag) in title information, select the appropriate check box.

To include review sources (510 tag) in title information, select this check box.

If a check box is cleared, the information does not appear or print.

Viewing Follett eBooks

If you purchased Follett eBooks and want to make them available from outside your school network, you'll need to set up a password. When a patron clicks the Electronic Access entry on the Title Information page for a Follett eBook, a password dialog appears. After the patron enters the common password and clicks OK, a new browser window opens and displays the Follett eBook. Patrons must enter the password whether they access WebCollection Plus from search stations within your network or from home.

If you prefer to allow access to Follett eBooks only from the workstations and search stations inside your school network, leave the Use IP Authentication option selected. With that setting, only computers with an IP address within the registered range can access Follett eBooks. When a patron clicks the Electronic Access entry, a browser window opens and displays the Follett eBook.

Regardless of the setting you choose here for WebCollection Plus, your OPACs always use IP authentication.

To set up a password, select the Use Password Authentication option and enter the password. It can be from one to ten characters. It must be alphanumeric, with no punctuation or special characters; it is not case-sensitive. When you are done,

enter your Setup Information page password, and click Save. Make sure to distribute the eBook password to your patrons.

Follett eBooks

Use IP Authentication

Use Password Authentication:

Select to allow access only from within your network.

Select to allow access from any browser and enter 1 - 10 alphanumeric characters.

While a Follett eBook is open, there is an inactivity timeout (currently 15 minutes). If no mouse or keyboard activity is detected in that time, the Follett eBook Web server presents a message to the patron. To resume reading, the patron must return to the Title Information page and click the link again.

Enabling optional tabs

By default, the Library (or Union) Search tab is the only available tab in WebCollection Plus. However, you can add tabs for Events, Information, and Web Links.

WebCollection Plus displays Event information based on the events entered in System Setup | Setup | Site | Events, or Union System Setup | Setup | Union | Site | Events (see pages 43 and 98, respectively). The Information and Web Links pages are yours to customize.

See also: For ideas on customizing the Library (or Union) Information and Web Links pages, see the following section, “Customizing your pages.”

To enable the Events, Information, or Web Links tabs, select the appropriate check boxes. To disable any of them, clear the check boxes.

Customizing your pages

WebCollection Plus provides two additional pages you can customize as you choose—the Information page and the Web Links page. To enable these pages, see “Enabling optional tabs” above.

Unless you possess a working knowledge of HTML code, you’ll need HTML editing software to edit these pages. If you have no experience with HTML code, consider a “what you see is what you get” HTML editor, such as Microsoft FrontPage Editor.

The HTML files for the Information and Web Links pages reside in the POLARIS\WWWROOT\WR\USER\

Information page

By answering questions that you are asked frequently, the Information page can be a handy reference for patrons and a time saver for you. For example, you could:

- Post library hours
- List your policies
- Provide a map of the library
- List new additions to your library's collection
- Incorporate your school's colors or mascot
- For union catalogs, post the member libraries' hours, policies, or locations

Important: There's virtually no limit on what you can do to this page. Do not, however, change the file's name or location.

To edit the Information page, open POLARIS\WWWROOT\WR\USER\\ENGLISH\LIBINFO.HTM in any HTML editing application.

The Information page initially contains only the title bar. By default, the Information page has a white background. This color can only be changed by editing the HTML file for the page.

For English/French or English/Spanish WebCollection Plus: You have access to both a French (or Spanish) and an English Information page. These files are located in the POLARIS\WWWROOT\WR\USER\\FRENCH (or SPANISH) folder.

Web Links page

By providing links to other libraries and on-line services, the Web Links page becomes an important resource for your students, faculty, and community. The types of sites you could link to include:

- Search engines designed for students
- Other libraries in your district
- National libraries
- Research sources
- Sites that relate to current curriculum topics

Important: As with the Information page, you can change the appearance of the Web Links page. Do not, however, change the file's name or location.

To edit the Web Links page, open POLARIS\WWWROOT\WR\USER\\LINKS.HTM in any HTML editing application.

The Web Links page initially contains only the title bar. By default, the Web Links page has a white background. This color can only be changed by editing the HTML for the page.

For English/French or English/Spanish WebCollection Plus: You can set up both an English and a French (or Spanish) Web Links page. These files are located in POLARIS\WWWROOT\WR\USER\\FRENCH (or SPANISH).

Testing your setup

After saving your setup information, the main WebCollection Plus Library (or Union) Search page appears.

Perform the following checks on the appearance and functionality:

1. On the main search page:
 - If you've added your name, an announcement, or a footer, or customized the graphics, verify that these appear as expected. (See page 436.)
 - The toolbar buttons that you enabled should appear. (See page 438.)
 - If you set up any QuickLinks, make sure the drop-down list appears and that all the links appear and take you to the correct site. (See page 448.)

Note: Some sites may open in a new window, not in the WebCollection Plus frame.

- The tabs that you enabled should appear at the top. (See page 450.)
2. To test the Patron Empowerment feature, click the My Info button on the toolbar. Log in with your ID and Password. Your Patron Information page should appear. Click the Log Out or Back button to return to the main page. (See page 445.)

If the toolbar buttons do not appear, check your settings on the System Setup | Setup | Patron Maintenance | Patron Defaults tab. (See page 74.)

3. From your Library (or Union) Search page, enter a search term and click a search icon to start the search.

Note: If you chose a keyword search and the keyword couldn't be found, WebCollection Plus returns a Subject Search hitlist with the closest subject match at the top of the page.
4. From the list of search results that appears, pick an entry and click its title or its Material type button on the left. The Title Information page appears.
5. To test the Place Hold/Reserve button, click the button (and log in, if necessary). The New Hold/Reserve Form should appear. Place a hold on the item and click Save. Back on the Title Information page, click the My Info button and verify that the hold is now listed in the Holds/Reserves section of your Patron Information page. (See page 445.)

If the Place Hold/Reserve button does not appear on the Title Information page, verify that you set up the Patron Empowerment feature on the System Setup | Setup | Patron Maintenance | Patron Defaults tab. (See page 74.)

6. If the E-mail Request button does not appear on the Title Information page, verify that you selected the Allow Hold Requests and/or Allow ILL Requests check boxes and entered an email address in Setup. (See page 440.)

For WebCollection Plus for Union: From the Title Information page, click Show Libraries. The Libraries page appears. Verify that the E-mail Request

button appears as desired. If not, return to the Setup Information page to change the settings. Return to the Title Information page and proceed with the next step. (See page 445.)

7. To test the Allow Hold Requests or Allow ILL Requests setup information, click E-mail Request on the Title Information page. The Hold/ILL Request Form appears. Enter your name and email address and click Send. A message appears informing you whether or not your request was sent successfully. (See page 440.)
8. Verify that the request arrives at the email address(es) you specified in Setup Information.

If a request could not be sent, make certain that the mail server is running. If you do not receive the requests or receive an error message from the mail server, check the email addresses and SMTP Mail Server information. (See page 440.)

Your SMTP Mail Server may require a sender email address. If so, either select Require Patron To Enter or select Use Default If Left Blank and specify a default address for patrons who don't have one. After saving any Setup Information changes, return to the Library Search page and repeat the test.

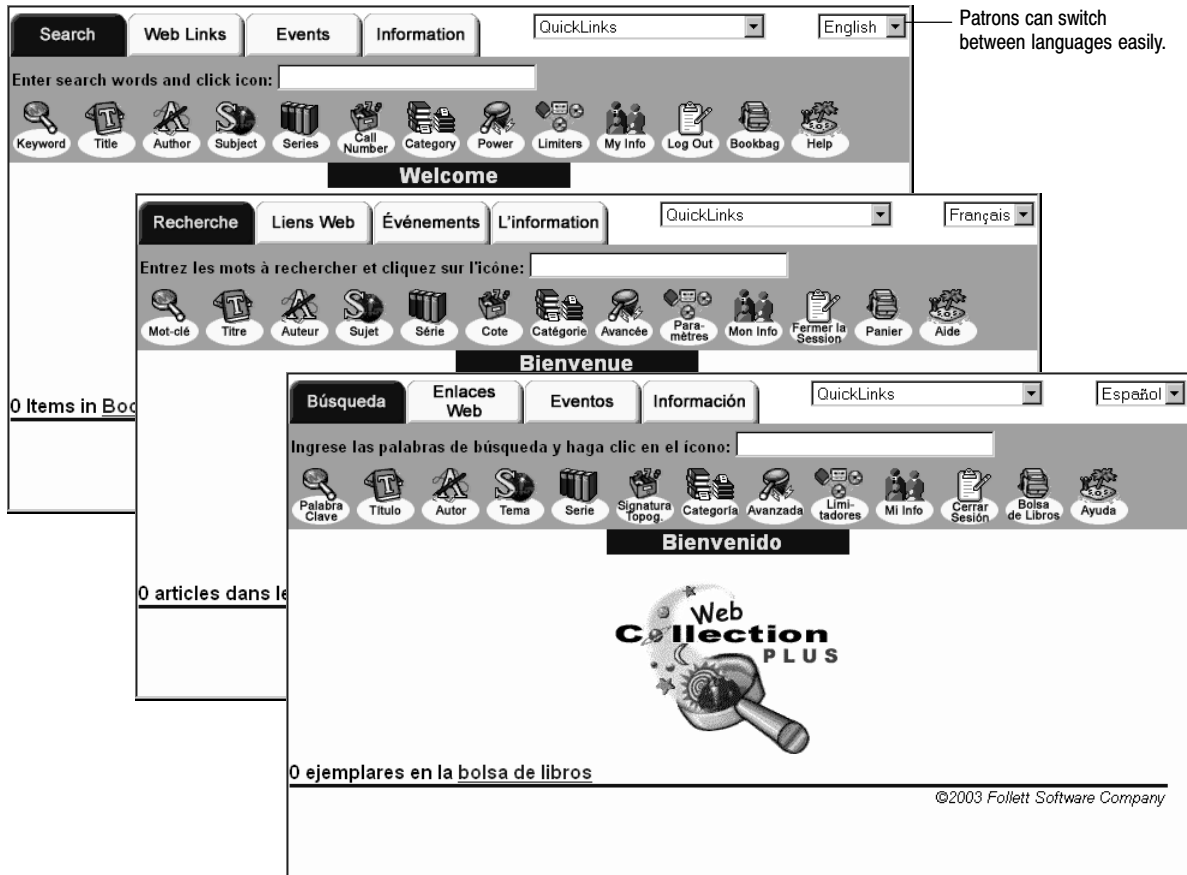
For WebCollection Plus for Union: We recommend that you repeat steps 6 through 8 for every member you've set up to receive email requests. You should also check any member URLs you entered by clicking the Availability button. If a connection to the member's WebCollection Plus can't be made, recheck the URL you entered on the Member Information page (see page 445). Contact the member, as well, to verify that its WebCollection Plus application is running. Then, check your Limiters page to verify your member groupings. (See page 439.)

9. If you have Follett eBooks, verify that the Electronic Access link (856 tag) appears on the Title Information page. To verify that patrons can retrieve the Follett eBook, click the link, enter the password (if you set one up), and click OK. The Follett eBook should appear in a new browser window.

If you selected to use password (and not IP) authentication *and* your network uses a proxy server *and* you use WebCollection Plus from within your network, you may need to call Follett Technical Support for your proxy server configuration options.

WebCollection Plus for English/French or English/Spanish

The dual-language versions of WebCollection Plus give your patrons the option of using the application in either language. Once a patron selects a language, it is stored in his browser's cookie file, and is displayed by default whenever the patron visits your WebCollection Plus.



In addition to the usual options available on the Setup Information page for WebCollection Plus or WebCollection Plus for Union, these versions provide you with several language-specific options. To access the Setup Information page, see the instructions on page 432.

Appearance
Default Language: French

Display Site Name
English: _____
French: _____

Display Announcement
English: _____
French: _____

Display Footer
URL: _____
English Text: _____
French Text: _____

Use Custom Graphics
Edit Graphics

Appearance
Default Language: English

Display Site Name
English: Welcome
Spanish: _____

Display Announcement
English: _____
Spanish: _____

Display Footer
URL: _____
English Text: _____
Spanish Text: _____

Use Custom Graphics
Edit Graphics

Select the default language for your patrons.

Enter your institution's name, an announcement, and a custom footer in both languages.

The Default Language option determines what language appears by default when a patron accesses your WebCollection Plus for the first time. The selected language appears on the toolbar buttons, the search and results page headings, the help files, and the text on the hold and interlibrary loan email notices.

Several features let you enter information in both languages so that it displays in the language the patron selects. In addition to the options on the Setup Information page, you can provide two versions of the following:

- Instructions for the Hold and ILL request forms
- Information page
- Web Links page

The French (or Spanish) versions of these files are located in the POLARIS\WWWROOT\WR\USER\\FRENCH (or SPANISH) folder; the English versions are in POLARIS\WWWROOT\WR\USER\\ENGLISH. For more information about editing hold and interlibrary loan request instructions, see page 442. For more information about creating custom Information or Web Links pages, see page 450.

You can define, however, only one set of custom graphics and one QuickLinks list. The same ones display, regardless of the language the patron has selected. Instructions on changing the graphics begin on page 436 and the QuickLinks on page 448. If you enable the Events tab, the events display in the language that you used when entering them in System Setup | Site | Events.

With these language options in mind, please return to page 434 to follow the complete instructions for setting up all your WebCollection Plus features.

Troubleshooting

When starting or running WebCollection Plus, error messages may appear in the Windows NT/2000 Event Viewer or in your browser during a search. The following table contains some of the error messages that may appear.

| Error message | Cause/Solution |
|--|--|
| Could not initialize database, error: [error description]. | Additional errors when attempting to initialize database. Contact Follett Software Company's Technical Support department. |
| Could not load resource file. | Resource file (WPACSPEN.TRF) not found. Contact Follett Software Company's Technical Support department. |
| The database is being exclusively used by [application name] since [date] at [time]. Please try again later. | The database cannot be accessed because it is being accessed in exclusive mode (e.g., the Rebuild Keywords utility). Wait until processing is complete and try again. WebCollection Plus will contact the database on the next search request. |
| The database server could not be found. | FairCom Server is not running. Restart FairCom Server. |
| The database server is unavailable. Please try again later. | FairCom Server was not started before starting WebCollection Plus. WebCollection Plus will contact the database on the next search request after FairCom Server is started. |
| Not enough memory for operation. | Low memory error. Close any unnecessary applications running on the Web server and check the TEMP directories for unnecessary files. |
| Port [number] is already in use. | WebCollection Plus may already be running. Check the Services dialog. If not, see "Configuring WebCollection Plus v5.10" in the <i>WebCollection Plus Guide</i> to change the port number. |
| You cannot access OPAC at this time. A critical process did not complete successfully. Please contact the librarian for assistance. | A critical process started and was unable to complete. Contact Follett Software Company's Technical Support department. |

Chapter 35 Using your OPAC

An on-line public access catalog (OPAC) lets your patrons search your library's collection quickly and easily. This chapter discusses how to use the different searches, their results, and the tools available in your OPAC.

Note: Before your patrons use your OPAC, review Chapter 33, "Setting up your search stations," and make any desired changes to the setup.

To start OPAC, from the computer desktop, open the Follett Applications folder and double-click the OPAC icon.

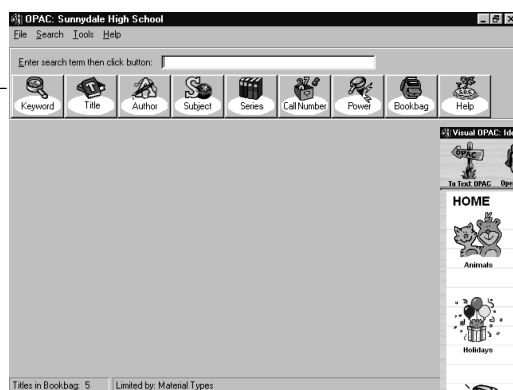
Note: You can also access the Follett Applications menu from the Windows Start | Programs menu or from the Mac OS Apple menu.

To exit, choose File | Exit or Quit. If password protection has been set up, type your exit password in the dialog that appears, and click OK.

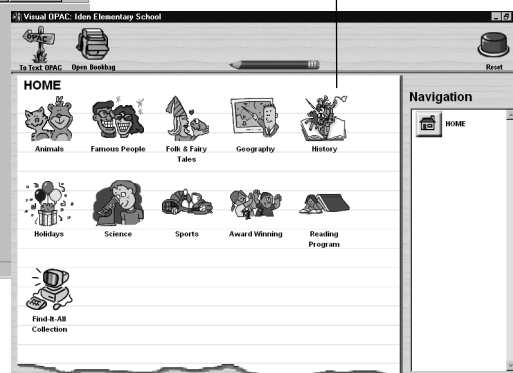
Choosing the interface

There are two different interfaces that the patron can use to search your collection: text and visual. Each has its own windows and search options:

Enter a search term and Click an index button to produce a selection list in the text interface.



Click a pre-configured action button to produce a selection list in the visual interface.



- The text interface allows the patron to enter a term and choose one of the many indexes in your database to search. The patron can narrow a search to find items belonging to a reading program or meeting Boolean search

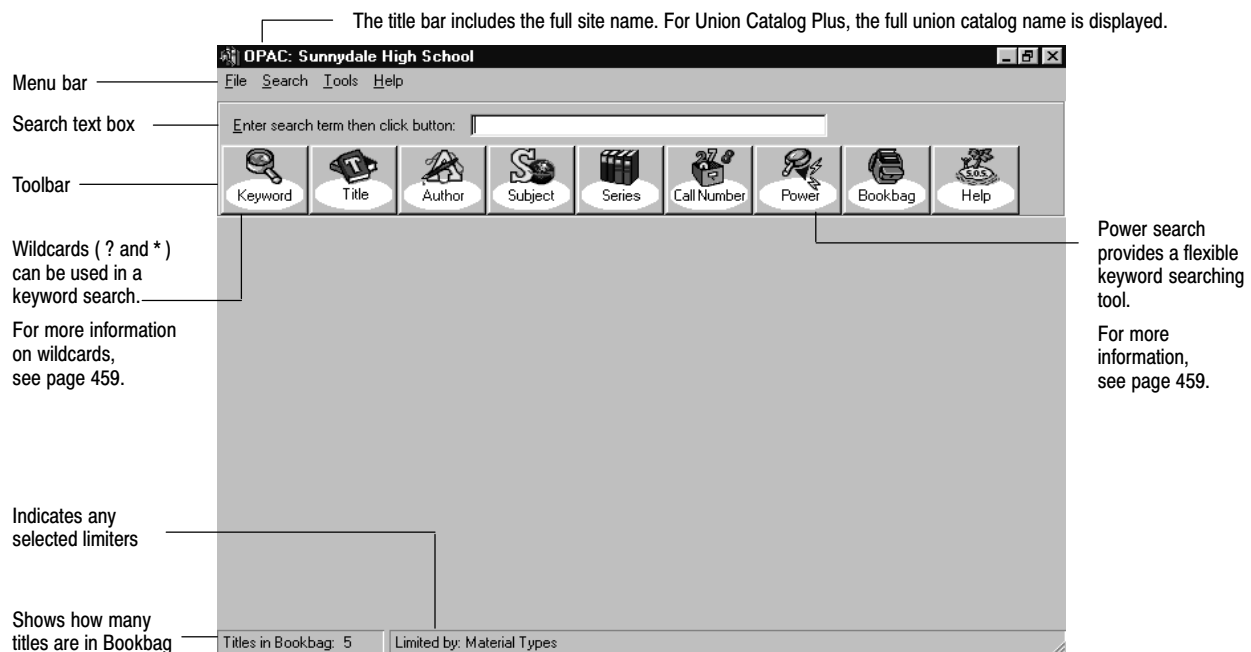
criteria, and set limiters on their searches. The search results are detailed and contain hyperlinks that allow the patron to expand or refine the search.

- The visual interface is designed for the less-experienced patron. Its windows have abbreviated information, a more graphical appearance, easy-to-use buttons, and larger fonts than the text interface. It incorporates pre-configured searches and a simplified type-in window. This interface is easy for the patron to use, but requires more time to set up.

Both interfaces can provide the patron with many research tools. These include launching other applications, linking to Web pages, building a bibliography, viewing their search history, and printing selection lists, title records, and bibliographies. The information on using the text interface begins below. The section on using the visual interface begins on page 477.

Searching your library in the text interface

Your OPAC supports a variety of searches to meet your patrons' needs. Patrons can access all the search options using the toolbar or Search menu.



Note: If a search option was disabled in Setup or is not selected by default (see page 410), it does not appear.

To search by keyword, title, author, subject, series, call number, or category, enter all or part of a word or phrase in the search text box. Click the appropriate button or Search menu item to start the search.

If you press **ENTER** after typing a search term, the search method defaults to that of the first button on the toolbar, not that of a previous search.

Important: Keyword and Power searches require a properly maintained keyword index. See "Setting up miscellaneous Cataloging options" on page 55.



What is a Power search?

Power search, an advanced keyword searching tool, allows patrons to search for several words or phrases. Search terms can be from 2 letters (or a single number) up to 40 alphanumeric characters. To access the Power search dialog, select Power from the toolbar or Search menu.

Wildcards

Wom?n finds “woman” and “women.”

Teach* finds “teach,” “teacher,” “teaches,” and “teaching.”

For more information on wildcards, see page 459.

Boolean operators define the relationship between search terms.

For an explanation of Boolean search logic, see page 460.

Clears the current search

By default, your OPAC searches the entire keyword index. You can specify that a word or phrase should be part of the title, author's name, notes, subject, or series title by selecting it here.

Some words are so common that searching on them isn't productive. To save time, your OPAC disregards these “stop words” during Keyword or Power searches. A list of stop words is located in the online help Glossary.

When searching on a phrase (e.g., United States), the words must be next to each other in the MARC record to be considered a match. Keywords separated by stop words are also valid. Your OPAC considers any group of letters surrounded by spaces to be a word.

See also: For a list of the MARC tags used in keyword searches, see page 637.

Wildcards (? and *)

Wildcards help your patrons if they're not certain how to spell a keyword. A question mark (?) replaces a single letter. You can use more than one question mark in a word, but it can't be the first character. An asterisk (*) replaces any number of characters at the end of a word. However, the asterisk can't be a word's first or second character.

Boolean search logic

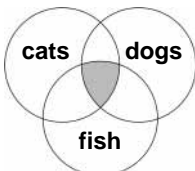
In addition to refining their keyword searches by selecting a searchable field for each search term, your patrons can use Boolean operators (AND, OR, BUT NOT) to define the relationship between search terms:

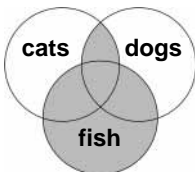
cats AND dogs  You get only titles that mention both cats and dogs.

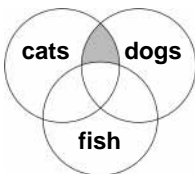
cats OR dogs  You get all titles that include cats, dogs, or both.

cats BUT NOT dogs  You get only titles about cats that do not mention dogs.

Using a second Boolean operator to add a third keyword or phrase can either contract or expand the search results. The search order follows the same logic as the equation $(a + b) + c$:

(cats AND dogs) AND fish  You get only titles that mention cats, dogs, **and** fish.

(cats AND dogs) OR fish  You get all titles that include both cats and dogs, plus **all** the titles that mention fish.

(cats AND dogs) BUT NOT fish  You get only the titles that include cats and dogs and do **not** mention fish.

Keep in mind that OR always expands a search. If the second Boolean operator is OR, the search could have some unexpected results. For example, imagine you're looking for books about cats that also mention either dogs or fish. The results of a search on (cats AND dogs) OR fish will be dominated by titles about fish. Instead, you should search for (dogs OR fish) AND cats.

Accelerated Reader search



Your patrons can search the database for titles that meet the requirements of the Accelerated Reader® program. They can retrieve them if the MARC records have the necessary information in the 526 tag (see page 635).

When the patron clicks the AR button, the Accelerated Reader Search appears:

To narrow the search, select the reading level.

Select a point value.

Click to open the AR dialog.

Any entries here are also optional.

The patron selects or enters a reading level range, point value range, and, optionally, a subject and/or an author. The patron then clicks Search to produce a list of items that meet the requirements.

The full MARC record display in the text interface includes subfields a, b, c, d, and z (at Union Catalog Plus sites, subfield 5 also displays). The record display in the visual interface includes subfields a, c, d, and z.

Lexile search



Lexile measures refer to numeric ranges from 0 to 2400 of the Lexile Framework® for Reading, an educational tool that links text and readers under a common metric without subjective evaluation.

When the patron clicks the Lexile button, the Lexile Search appears:

The screenshot shows a window titled "OPAC: Sellers High School" with a menu bar (File, Search, Tools, Help) and a search input field. Below the input field is a row of search buttons: Keyword, Title, Author, Subject, Series, Power, Lexile, Bookbag, and Help. The Lexile button is highlighted. A callout points to the Lexile button with the text "Click to open the Lexile dialog." Below the buttons is the "Lexile Settings" dialog box. It contains an "Enter a Lexile Measure" input field, a "Search for titles" dropdown menu set to "50" with the text "above and below the Lexile Measure", and two checkboxes: "Include Beginning Reader Titles (BR)" and "Include Non Prose Titles (NP)". There are also "Search", "Cancel", and "Clear All" buttons. A callout points to the checkboxes with the text "Any entries here are optional." Below the dialog box is a "Search For:" section with two input fields and an "AND" button between them. At the bottom left, it says "Titles in Bookbag: 0". A callout on the left points to the "Enter a Lexile Measure" field with the text "Enter a Lexile Measure. The search can be narrowed to plus or minus 0, 50, or 100 Lexiles."

Your patrons can search the database for titles with Lexile Measures within 0, 50, or 100 measures of a measure they enter. Patrons can also provide up to two keywords to search by.

In addition to searching for Lexile Measures, patrons can list Beginning Reader and Non-Prose titles. To include titles intended specifically for beginning readers, check the Include Beginning Reader Titles check box. Selection of the Include Non-Prose Titles check box displays items containing at least 50% nonstandard prose that do not have Lexile Measures. Examples of non-prose materials include poems, plays, songs, and books with incorrect or no punctuation. (You must have Lexile information in the 521 tag of your MARC records.)

Reading Counts! search



The Reading Counts search allows your patrons to search Scholastic Reading Counts!™ titles by subject, author, reading level, and/or point values. The resulting list includes a reading level number and the number of points a student can earn by reading certain titles.

When the patron clicks the RC button, the Reading Counts Search appears:

To narrow the search, select a reading level range, and/or the point value.

Click to open the RC dialog, or use the Search menu.

Any entries here are optional.

The patron selects or enters a reading level range, point value range, and, optionally, a subject and/or an author. The patron then clicks Search to produce a list of relevant titles. The list of titles the patron receives is limited to the first five hundred titles, so they are more likely to receive relevant titles if they use specific point values and keywords.

Important: You must have Reading Counts information in the 526 tag of your MARC records for this search to yield results. You must also rebuild the Reading Counts headings before a Reading Counts search may be performed. See page 596 for details on rebuilding Reading Counts headings. To limit by reading level, the reading level must be in the 526c. The search does not examine the 521 tag (Target Audience Note). To learn more about cataloging the 526 tag, see page 635.

Find-It-All Collection searches



Find-It-All One Search is a subscription-only service, available from FSC, that allows your patrons to search local library, Internet, and subscription databases from one window.

If you have purchased a subscription, the Find-It-All button on the toolbar and in Visual OPAC, or the Search menu item, provides your patrons with access to the Find-It-All One Search.

Using the search results

From the selection lists to the detailed view of the record, the search results contain features that help patrons find what they want.

After every search request, a selection list appears with the closest match highlighted. Selection lists also identify the search type and search term used. To see more about an item, double-click it, or highlight it and click Select.

Note: If a keyword can't be found, your OPAC returns a subject list highlighting the closest match.

Select a cross-referenced item to go directly to the recommended topic.

Select an item with multiple entries to access a secondary selection list.

Select an item with a material type icon to access the complete title and copy information.

Status shows copy availability. If there are no copies for the title, or if Circulation Plus is not installed, the column is blank.

Click the column header to sort a Keyword or Power Search selection list.

If Patron Empowerment is enabled, opens the Login dialog or the New Hold/Reserve dialog.

Adds the highlighted title to the Bookbag. For more information on the Bookbag, see page 475.

Shows the number of entries in a Keyword or Power Search selection list.

OPAC: FSC Magnet School
File Search Tools Help
Enter search term then click button: folklore
Keyword Title Author Subject Series Call Number Power Bookbag Help
Subject Search: folklore
Subject
Folk beliefs SEE: Folklore
Folk literature.
Folk music
Folk song
Folk stories
28 Folklore.
2 Folklore-A
Folklore-C
3 Folklore-E
Folklore-E
Folklore-F
2 Folklore-G

OPAC: FSC Magnet School
File Search Tools Help
Enter search term then click button: folklore
Keyword Title Author Subject Series Call Number Power Bookbag Help
Titles Under: Folklore.
Add to Bookbag
Titles in Bookbag:
Title Author Call Number Status
Aesop's fables 398.2 AES In
Aunt Pitty Patty's piggy 398.22 AYL In
The Barefoot book of giants, ghosts and goblins : traditio Matthews, John. 398.2 MAT Out
Beauty and the beast Carr, Jan. 398.2 CAR In
Best loved fairy tales Apsley, Brenda. 398.2 APS In
A book of enchantments and curses Manning-Sanders, R 398.2 MAN In

OPAC: FSC Magnet School
File Search Tools Help
Enter search term then click button: folklore
Keyword Title Author Subject Series Call Number Power Bookbag Help
Keyword Search: folklore
Title 1 of 46
Type Title Author Year Call Number Status
Internet sites about Folklore Follett Software Company. 1998
America in legend: folklore from the colonial perio Dorson, Richard Mercer, 1916- 1973 398 Dor In
Half-a-Ball-of-Kenki : an Ashanti tale retold Aardema, Verna. 1979 398.2 AAR In
Aesop's fables 1991 398.2 AES In
American folklore and legend. 1978 398.2 Ame In
Best loved fairy tales Apsley, Brenda. 1987 398.2 APS In
Stone soup : an old tale Brown, Marcia. 1947 398.2 BRO In
Beauty and the beast Carr, Jan. 1993 398.2 CAR In
The silver cow : a Welsh tale Cooper, Susan. 1983 398.2 COO In
Brother Anansi and the cattle ranch De Souza, James. 1989 398.2 DES In
Eleven nature tales : a multicultural journey DeSpain, Pleasant. 1996 398.2 DES In
Eleven turtle tales : adventure tales from around t DeSpain, Pleasant. 1994 398.2 DES In
Add to Bookbag Hgld/Reserve Select Close
Titles in Bookbag: 3

See also: For information on printing search results, see page 470.

Depending on your setup (see page 412), the record appears in full or brief format, but patrons can always switch between the two formats. But this window provides more than title details:

The image shows two screenshots of the OPAC interface for 'FSC Magnet School'. The top screenshot shows a full record for 'Horses / Frederick L. Devereaux, Jr.' with fields for Title, Author, Published, and Description. The bottom screenshot shows a brief record for the same title, including a 'Notes' field with highlighted search terms and a 'Copy Information' table.

Annotations:

- To find information that is related to this record, click any hyperlink.** (Points to the 'Horses' search term in the title field of the full record.)
- Full vs. Brief record** (Points to the 'Full' and 'TitlePeek' buttons in the right sidebar.)
- This button is dynamic. Click it to switch between brief and full record display.** (Points to the 'TitlePeek' button.)
- Opens the New Hold or Login dialog** (Points to the 'Hold/Reserve' button.)
- To view the record above or below this one on the selection list, click the Previous or Next arrow.** (Points to the left and right arrow buttons.)
- Access more information about this title. Available only with a TitlePeek subscription.** (Points to the 'Brief' button.)
- Keywords or Power Search terms are highlighted in the record.** (Points to the highlighted word 'horses' in the 'Notes' field.)
- To see a list of the titles shelved near a particular copy, double-click it, or highlight it and click Shelf Browse.** (Points to the 'Shelf Browse' button.)
- Displays the location, availability and description of each copy** (Points to the 'Copy Information' table.)
- Summarizes the circulation status for all copies** (Points to the 'Titles in Bookbag' and 'Copies Owned' summary at the bottom.)

For Union Catalog Plus: Copy Information differs slightly. The short site name for each copy is shown; status and barcode numbers are not displayed.

| Library | Call Number | Sub Location |
|------------|-------------|--------------|
| Fenzel FC | F HOP | |
| Jensn Elem | Fic HOP | |
| Sellers HS | FIC HOP | Series shelf |
| Troy JHS | E HOP | |

Note: For ease of use to the patron, a "Member" is referred to as a "Library" in the OPAC.

See also: For a list of the MARC tags used in full and brief record displays, see page 638.

Electronic Location and Access—the 856 tag in action

If you include information in the 856 tag (Electronic Location and Access), patrons can access electronic media (e.g., eBooks, CD-ROMs, or related Web sites). In full record view, Elec. Access appears after the Notes information.

Note: If you choose to disable links to other applications in Setup (see page 406), the Elec. Access information is not hyperlinked.

The screenshot shows the OPAC interface for Dunlop Elementary School. The search term is 'pecos bill'. The record for 'Pecos Bill : a tall tale / retold and illustrated by Steven Kellogg' is displayed. The ELEC. ACCESS field contains the text 'Internet sites about Folklore'. An arrow points from the text 'To access electronic media, click the Elec. Access hyperlink.' to this field. Below the record, a 'Copy Information' table shows call numbers 398.2 KEL and 398.2 KEL. An arrow points from the text 'The electronic resource is launched in a browser.' to a browser window showing 'WebPath Express results on Folklore - Microsoft Internet Explorer'. The browser window displays a page titled 'Folklore' with 7 sites total, including links to 'Aaron's Storybook - Folktales', 'Hans Christian Andersen fairy tales and stories', 'Encyclopedia Mythica - Folklore', 'FolkArt & craft exchange', and 'Norwegian folktales'.

Certain Elec. Access hyperlinks, such as those for the WebPath Express service, are not actually part of the bibliographic record in which they appear; they are “virtual” 856 tags. To edit or delete a virtual 856 tag, you must look up the *authority* record that contains the information through Cataloging; the authority heading will match one of the bibliographic record’s subject headings.

Note: You control whether or not virtual 856 tags display; see the Show Authority 856 tags in OPAC option on System Setup's Cataloging Misc tab (see page 55). For more information on virtual 856 tags, see page 358.

eBooks

eBooks are electronic versions of printed books. The actual file containing the text can reside anywhere—on a floppy disk, the hard drive of a workstation, your library server, or out on the Internet. You can purchase eBooks from several vendors. You can also download free eBooks from several sites, like that of Project Gutenberg.

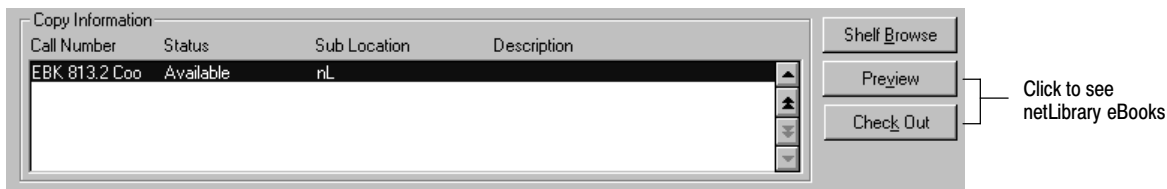
In order for patrons to find eBooks in the OPAC, there are two material-type icons for them. When the MARC records contain the correct information (see page 360), the eBook icon appears in the hitlist and on the record view, making them readily identifiable. Patrons can also limit searches to eBooks by selecting eBook in the Material Types list in the Limiters dialog.

netLibrary eBooks



netLibrary
eBook icon

When you purchase eBooks from netLibrary, you do not download the text. Instead, the actual file resides on the netLibrary Web site. To facilitate the access and use of these remote resources, netLibrary eBooks have been integrated into the Catalog Plus application. This allows patrons to link directly to the eBook from the OPAC. Two extra buttons, Preview and Check Out, appear on the lower right side when the Title Information is for a netLibrary eBook.



Preview allows your patrons to view the eBook. This is an ideal way for patrons to access reference materials, do research, or decide if they want to check out the eBook. In addition, they can do a full-text keyword search of the item. A Preview session lasts 15 minutes, and is automatically renewed as long as the patron is active at the site. Preview does not require logging in.

Check Out allows your patron to check out the eBook. There are two ways to check out: Online and Download. To check out the eBook either way, your patron must have his/her netLibrary user name and password. The checkin is automatic at the end of the loan period.

An Online checkout gives the patron the exclusive right to view the eBook. After checking it out, the patron can read the eBook from any Web-enabled computer, even one at home. To read the eBook at another computer, your patron merely opens a browser, enters the netLibrary address, www.netlibrary.com, logs in with a user name and password, and clicks My eBooks.

The other checkout option, Download, allows the patron to download the eBook for reading off line. An application, netLibrary eBook Reader, is needed to read the eBook offline. This software is available on the checkout page for downloading at no charge. Once the Reader is downloaded, it can be used for all Download checkouts at the search station. The option of using the netLibrary eBook Reader is not available for Mac OS.

Note: Before you can access netLibrary eBooks, you must enter your netLibrary account number on the Site | Identification tab in System Setup.

For Union Catalog Plus: If your union catalog has a netLibrary account and the account number is entered on the System Setup | Union | Site tab, the Title Information page contains the Preview and Check Out buttons in the upper right corner. If the member has a netLibrary account and has WebCollection Plus, the buttons appear when the patron clicks the Availability button.

Other eBooks



Generic
eBook icon

The generic eBook icon appears next to all other eBooks (including Follett eBooks) in the OPAC. In the full record view, the Electronic Access hyperlink (856 tag) is enabled. Clicking the hyperlink opens the eBook file in its appropriate application. This could be the search station's Web browser if your eBooks reside on a Web site, a word processor for eBooks in text file format, or proprietary reader software such as Microsoft Reader or Adobe Acrobat eBook Reader. Patrons can read Follett eBooks in a browser window or download them for reading in Adobe Acrobat eBook Reader.

Follett eBooks display the generic icon and have a clickable Electronic Access hyperlink (856 tag). Clicking the hyperlink opens the eBook in the search station's Web browser. Follett eBooks also have an inactivity timeout (currently 15 minutes). If no mouse or keyboard activity is detected in that time, the Follett eBook Web server closes the eBook and presents a message to the patron. To continue reading the eBook, the patron needs to return to full the record view in OPAC and click the link again.

See also: For information on cataloging electronic resources, see page 355. If the correct icons do not appear next to eBooks, follow the instructions on page 360 to edit the MARC records.

TitlePeek button

If your library has a subscription to TitlePeek, you may see a button on the right (next to the Brief/ Full button). Clicking this button launches your browser and displays additional information about the title. This may include: cover image, table of contents, publisher's summary, author notes, and journal reviews.

This service allows you to preview a selection without leaving your search station, and can assist you in the assessment of the title's readability and contents. The TitlePeek button appears only when information is available for the title.

Note: If your patrons cannot access TitlePeek, you may need to enter your proxy server information in OPAC Setup. For more information, see page 405.

The image shows a screenshot of an OPAC interface. The main window is titled "OPAC: Follett Software Company Demo". It features a search bar with the text "harry" and several search filters: Keyword, Title, Author, Subject, Series, Call Number, Power, Bookbag, and Help. Below the search bar is a "Title Information" section for the book "Harry Potter and the Chamber of Secrets / by J.K. Rowling ; illustrations by Mary GrandPré". The information includes the author, publisher (New York : Arthur A. Levine Books, 1999), description (341 p. : ill. ; 24 cm.), edition (1st American ed.), and notes (Sequel to: Harry Potter and the sorcerer's stone. Wilson's Children, June 2000. Elem. School Library Collection, June 2000. School Library Journal starred, July 1999). To the right of the title information is a "FIC ROW" label and a "Close" button. Below the title information is a "Copy Information" section with columns for Call Number, Status, Sub Location, and Description. A "TitlePeek" button is located to the right of the "Brief" button. An arrow points from the "TitlePeek" button to a browser window titled "TitlePeek - Microsoft Internet Explorer". The browser window displays the book's cover and additional information, including the book title "Harry Potter and the chamber of secrets" by J. K. Rowling, a "Book Cover" button, and a "Table of Contents" button. The cover image shows the title "Harry Potter AND THE CHAMBER OF SECRETS" by J.K. ROWLING.

To access additional title information, click the TitlePeek button.

The available information appears in your browser.



Printing search results

If printing is set up (see page 406), patrons may print their lists of search results, complete title information, and event notices. To print the contents of a window, select Print from the toolbar or File menu. Please note, the Print button and the File | Print option are disabled until a search is initiated.

Only the visible portion of lists prints out. When printing title information, your OPAC prints either the full or brief MARC record, depending on which is currently displayed, and includes a complete list of the title's copies. When printing events, your OPAC also includes the associated notes.

Searching tools

In addition to a wide variety of search options, your OPAC provides patrons with a number of tools to help make their search sessions more effective.

Customizing the limiters

Each time the application is started, your OPAC automatically uses the default limiter settings. If allowed in Setup (see page 412), patrons can override these settings and customize the limiters for their searches. Once they do so, the limitations display at the bottom of the window.

Note: You may want to ask your patrons to reset the search station after they've finished searching. Choosing Reset Station from the Tools menu clears the current search and search history, and reapplies the default limiters.

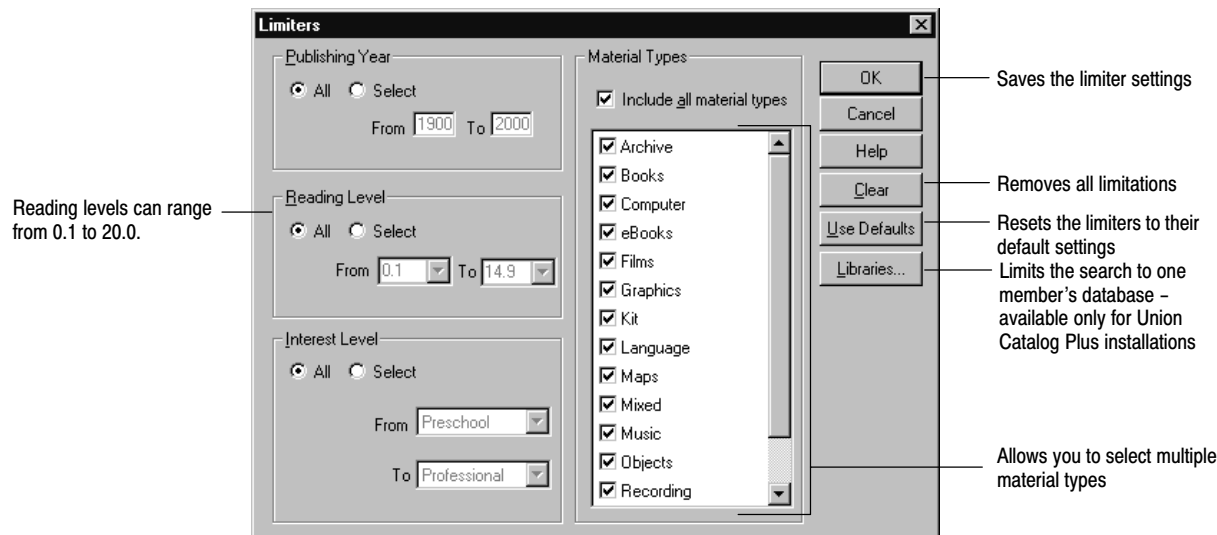
Limiters let your patrons make their searches more specific. For example, to find recent books, limit the search to titles published between 1995 and the current year. To find books appropriate for students with a fourth grade reading ability, limit the search to titles with a reading level between 4.0 and 4.9.

Your patrons can limit searches by publishing year, reading level, interest level, or material type. If a particular limiter option is not allowed in Setup (see page 412), that option is disabled.

Important: When using limiters, keep in mind that if a record doesn't contain the limiting information, that record is ignored. This is particularly important for reading and interest levels limiters. To use these limiters effectively, your records must contain information in a 521 tag.



To access the Limiters dialog, select Limiters from the toolbar or Tools menu. The Limiters dialog appears with the current limiter settings. Limiters set to All do not restrict searches in any way:



Note: Limiters are ignored during Accelerated Reader, Reading Counts, Lexile, authority, call number, and category searches.

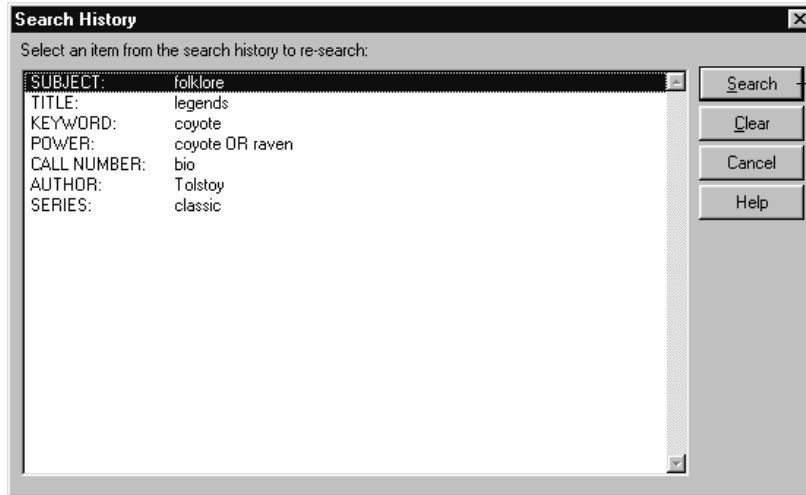
For Union Catalog Plus: In addition to the above limiters, your patrons can choose to search the entire union catalog database or the collection of one member library. By default, the entire union catalog database is searched.

To search a single member's collection, the patron clicks the Libraries button on the Limiters dialog, highlights the desired member library, clicks Select, and clicks OK on the Limiters dialog. The full site name of the selected member displays at the bottom of the search window. The search results show only titles belonging to that member, but the Copy Information window does include all copies belonging to that title. The Copy Information window includes a Library column showing the short site name of the member library with the copy, the call number and sub location. Copy status and barcode numbers are omitted.

To clear the member limitation and search the entire union catalog database, the patron must click Clear and click OK on the Limiters dialog.

Repeating a search

The search history contains a record of the last 14 searches. This allows patrons to quickly repeat a prior search. To access the Search History dialog, choose Tools | Search History:

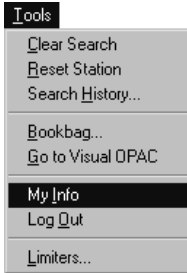


To repeat a search, either double-click the search term or highlight it and click Search.

The search history does not include searches that did not specify a search term. From the Search History dialog, patrons can also clear the search history without affecting any of the other settings at the search station.

Patron Empowerment

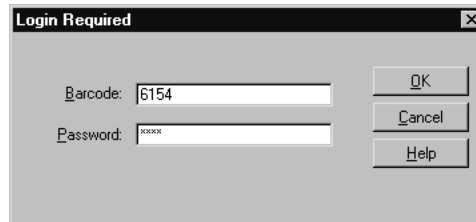
If allowed in System Setup | Setup | Patron Maintenance | Patron Defaults (see page 74), your patrons can log in to view their checkouts, fines, and holds, and even to place holds and reserves. Once you enable this feature, the application adds the My Info and Log Out menu items and toolbar buttons.



Logging in

To log in, a patron clicks the My Info toolbar button, a Hold/Reserve button, or selects Tools | My Info from the menu. The login dialog appears:

Set up your login fields in System Setup.



The patron enters his barcode or ID number, and his password, and clicks OK. Regardless of the field selected to be the password, the patron must enter it exactly as it appears in the patron record. Please note the following details:

- Patrons with printed barcodes can use a scanner to enter the information.
- Neither field is case-sensitive; the patron can enter upper- or lower-case letters, regardless of the case used in Patron Maintenance.
- If you chose Birth Date as the password, the patron must use the MMDDYYYY format. For example, for May 13, 1990, the patron must enter **05131990**. The patron should not enter any slashes, dashes, or spaces.
- The patron must enter the entire contents of the field. For example, if you chose Last Name as the password, then John Adams, Jr., whose patron record has "Adams, Jr." in the Last Name field, must enter **adams, jr.** —not **adams**.
- For privacy, the password entry is masked by asterisks.

Viewing My Info

If the patron selects My Info, the Patron Information dialog appears after a successful login:

Patrons have access to three of the seven tabs in the Patron Information dialog: Checkouts, Fines, and Holds. They cannot edit any of the information; it is read-only. In addition, the Help button is not available.

| Title | Price | Call Number | Barcode | Due Date |
|--------------------------------------|---------|-------------|---------|-----------|
| Jack, Skinny Bones, and the golden p | \$0.00 | 398.22 HEL | T 5411 | 9/15/2001 |
| Misty's twilight | \$0.00 | FIC HEN | T 20974 | 9/18/2001 |
| 48 goes wild | \$13.60 | FIC Gil | T 9095 | 9/28/2001 |
| Deep down underground | \$12.56 | E DUN | T 1033 | 9/28/2001 |

The dialog is the same one displayed in Circulation Desk and Patron Maintenance. In the OPAC, however, only three of the seven tabs appear: Checkouts, Fines, and Holds.

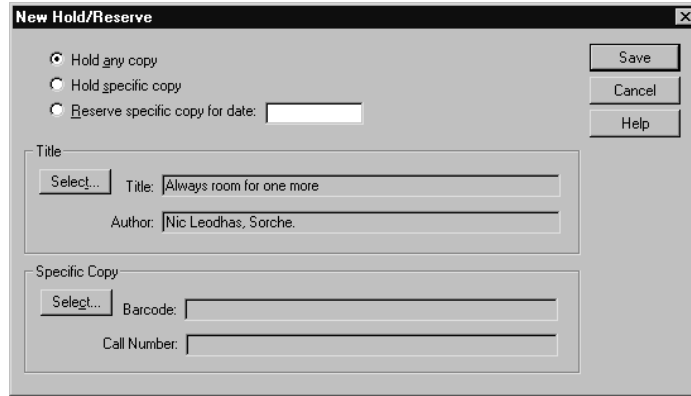
On the Fines tab, any fine notes you created do not appear. If you chose to automatically calculate fines (in System Setup | Setup | Circulation | Fines) and the patron has any pending fines, the Fines tab includes a note containing the current pending fine amount for overdue items not yet returned.

If you allowed (on the OPAC General Setup tab) patrons to print, they can print the information on the three tabs.

Placing holds or reserves

A patron can place a hold or reserve from three different windows in OPAC: the selection list, the record display window, and the Bookbag (if enabled). The

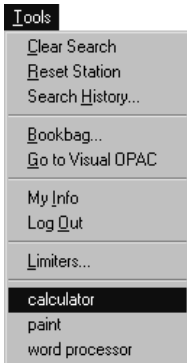
patron highlights the desired item and clicks the Hold/Reserve button. If the patron has not yet logged in, the Login Required dialog appears. After a patron logs in successfully, the New Hold/Reserve dialog appears:



The OPAC automatically enters the highlighted title into the dialog. To place an any-copy hold, the patron merely clicks Save. To place a specific-copy hold or a reserve, the patron selects the appropriate radio button, enters a reserve date (if required), selects a copy, and clicks Save. A message appears, either confirming the transaction and providing the date and position in the queue, or reporting a conflict that prevents the transaction. The hold or reserve appears immediately on the Holds tab in the Patron Information dialog.

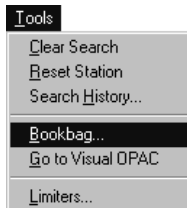
Logging out

To log out, the patron either clicks the Log Out button or chooses Tools | Log Out or Tools | Reset Station from the menu. If the patron forgets, the Reset inactive search station function includes an automatic logout.



Accessing other applications

If you set up your OPAC to allow access to other applications (see page 406), the links you enter are added to the Tools menu. To launch an application, simply select it from the Tools menu.



Using the Bookbag

If allowed in Setup (see page 406), your patrons can collect the titles that interest them, and edit and print or save the list. If allowed in System Setup, they can place holds or reserves on items in the Bookbag. To open the Bookbag, select Bookbag from the toolbar or Tools menu:

Bookbag

Bookbag contents:

| Call Number | Title | Author |
|-------------|-------------------------------------|---------------------------------------|
| FIC And | The blind Connemara. | Anderson, C. W. (Clarence William), 1 |
| FIC Sew | Black Beauty : the autobiography | Sewell, Anna, 1820-1878. |
| FIC KEN | Trixie Belden and the mystery at S | Kenny, Kathryn. |
| 798.2 RAW | A practical guide to riding and pon | Rawson, Christopher. |
| 636.1 CHU | All color world of horses | Churchill, Peter, 1933- |

Buttons: Print..., Print Preview..., Save to File..., Remove Title, Remove All, Close, Help

Bookbag output options:

Bookbag Title: My Bookbag Sort By: Call Number-Author

Show Annotations

Annotations:

- Sends the report to the printer
- Uses the output options to show how the report will print or save
- Saves the report to a file
- Deletes the selected title, or empties the Bookbag
- By default, the Bookbag Report is sorted by Call Number-Author when printed or saved. You can also sort the report by Title-Author or Author-Title.
- Shows the titles in the order they were selected
- Enter the title you want for the report. "My Bookbag" is the default title.
- This option adds the following note tag contents to the report:
 - 505 tag, subfield a
 - 511 tag, subfield a
 - 520 tag, subfield a

The Bookbag information is printed or saved in bibliographic format. The following is an example of a Bookbag Report using the default settings:

```

Sunnydale High School
10/13/2000 @ 11:53 am           My Bookbag           Page 1
-----
398.2 LAN
    Lang, Andrew, 1844-1912, ed.  The orange fairy book.  New York, :
    Random House, c1964.

398.2 MAC
    MacDonald, George, 1824-1905.  At the back of the North Wind.
    New York, : F. Watts, [1964].

398.2 NES
    Ness, Evaline.  Tom Tit Tot : an English folk tale.  Scribner,
    1965.

398.22 SMA
    Small, Ernest.  Baba Yaga.  Boston : Houghton Mifflin, c1966.
  
```

Viewing events

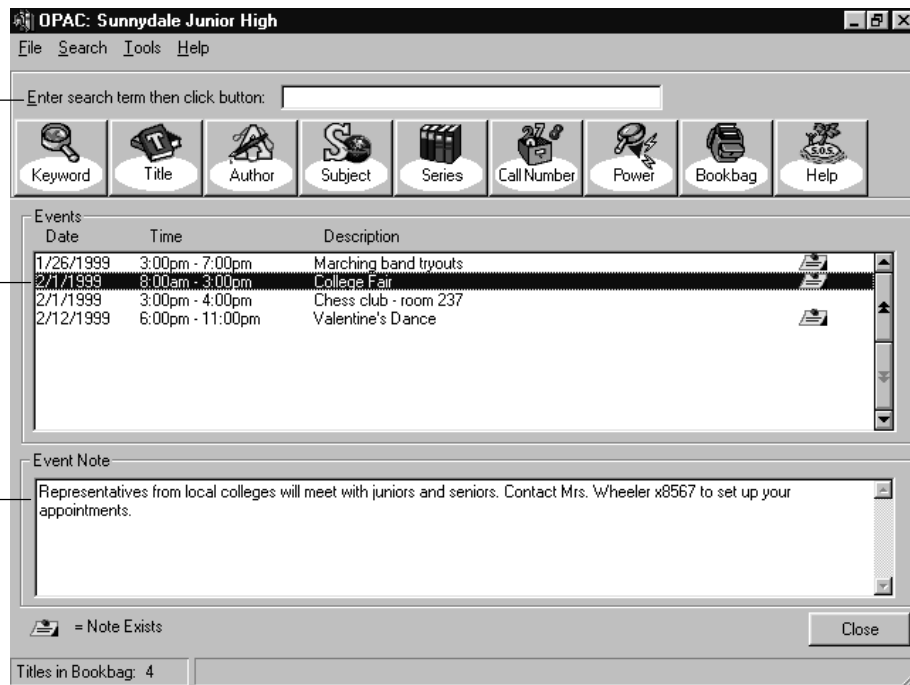
The Events calendar is a tool for increasing participation in library or school activities, or for offering a bulletin board for community happenings. All events are entered and modified through System Setup (see page 43). Your OPAC's Events calendar is a read-only option.

For Union Catalog Plus: The events listed are for the union catalog. Member events are not transferred or displayed at the union catalog.

To display event information in your OPAC, select Events from the toolbar or Search menu. The Events list appears, highlighting the next scheduled event:



To search for an event listing by date, enter the date (e.g., 2/1/1999) in the search text box, and click Events.

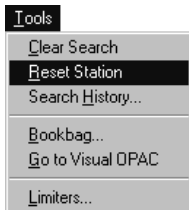


If the highlighted event has a note, it appears here.

Resetting the search station

After patrons have finished searching, they should be encouraged to prepare the search station for the next patron. Reset Station clears the current search information, Bookbag, and search history, returns the limiter options to the default settings, logs the patron out, and redisplay the default interface.

To reset the search station, choose Reset Station from the Tools menu.



Clearing the current search

Clear Search, the first option on the Tools menu, clears the current search. The limiters, Bookbag, search history, and patron login are unchanged.

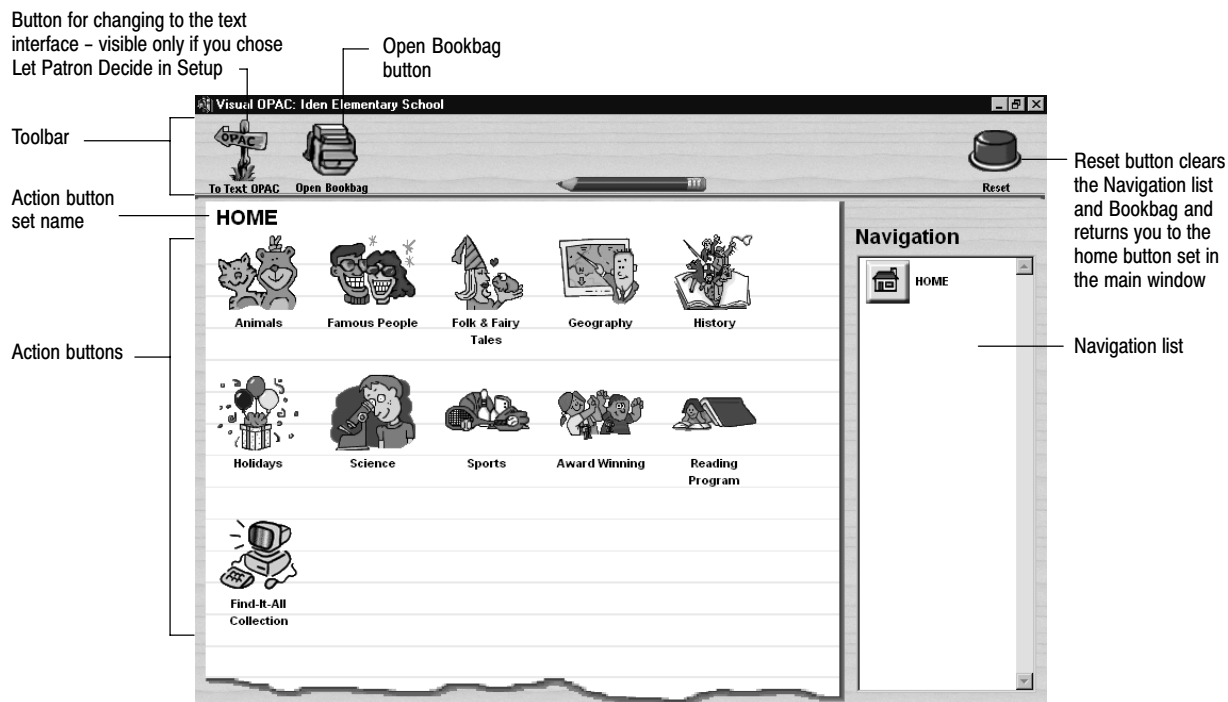
Searching your library in the visual interface



The visual interface is designed for the less-experienced patron. Its windows have abbreviated information, easy-to-use controls, and a more graphical appearance than the text interface. It incorporates pre-configured searches, a simplified type-in window, and access to other applications and the Internet.

Unlike the text interface, where the patron must enter a search term and select an index, in the visual interface, the patron merely clicks an action button to get results. The visual interface comes with several pre-configured action button sets; you can use these buttons and sets, change them, or create your own in Setup (please see page 415 for more information).

To open the visual interface, you must first enable it in Setup by choosing Visual OPAC Only or Let Patron Decide on the General OPAC Setup tab (see page 405). If you chose Let Patron Decide, launch the visual interface by selecting Tools | Go to Visual OPAC on the menu or by clicking the toolbar button. If you chose Visual OPAC Only, you see the following image when you launch your OPAC. This is the main window, populated with the default home button set:



Getting around in Visual OPAC

At the top of the window is the toolbar. From left to right, depending on the choices you made in Setup, the toolbar buttons are To Text OPAC, Open Bookbag, and Reset. In other windows, the Add to Bookbag and Print buttons also appear.

To distinguish these and the action buttons from non-functioning icons, your mouse pointer changes to a hand when it moves over a clickable button. In



addition, when you pause your mouse pointer over a functioning icon (except action buttons), a tool tip appears, explaining the use of the icon. The hand and the tool tips are not available on Mac OS.

Important: Users must use a mouse or touchscreen to navigate in the visual interface. The Tab, arrow, and Enter keys do not function here.



Below the toolbar is the home button set (if you chose to load the default buttons in Setup). The home button set is the starting point for all visual searches at this search station. By clicking an action button, a patron could access:

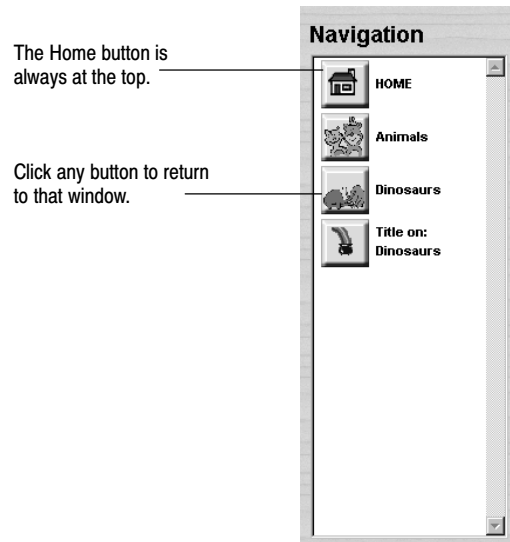
- The results of a bibliography search;
- The results of a keyword search;
- Another set of action buttons, taking the search from a broad term to several, more specific, terms;
- Another application;
- A specific Web page in your browser;
- The Type In Search window, a simplified version of the text interface.

The default home set buttons have been configured to load other sets of buttons. These secondary sets have been configured to perform keyword searches on your collection. Please check to see that all the searches are productive for your database and that your keyword index is up-to-date. See page 55 for information on automatically generating keywords as you catalog, and page 345 for information on updating your keywords. For a table outlining the default buttons, go to page 417. To reconfigure an action button, see page 418.

Note: If a button opens another application, the patron must close, not minimize, the application when the patron finishes using it. This avoids having multiple instances of the same application open at the same time on a search station.

Tracing your steps

As the patron progresses through the visual interface, the Navigation list, on the right side of the window, records the steps:



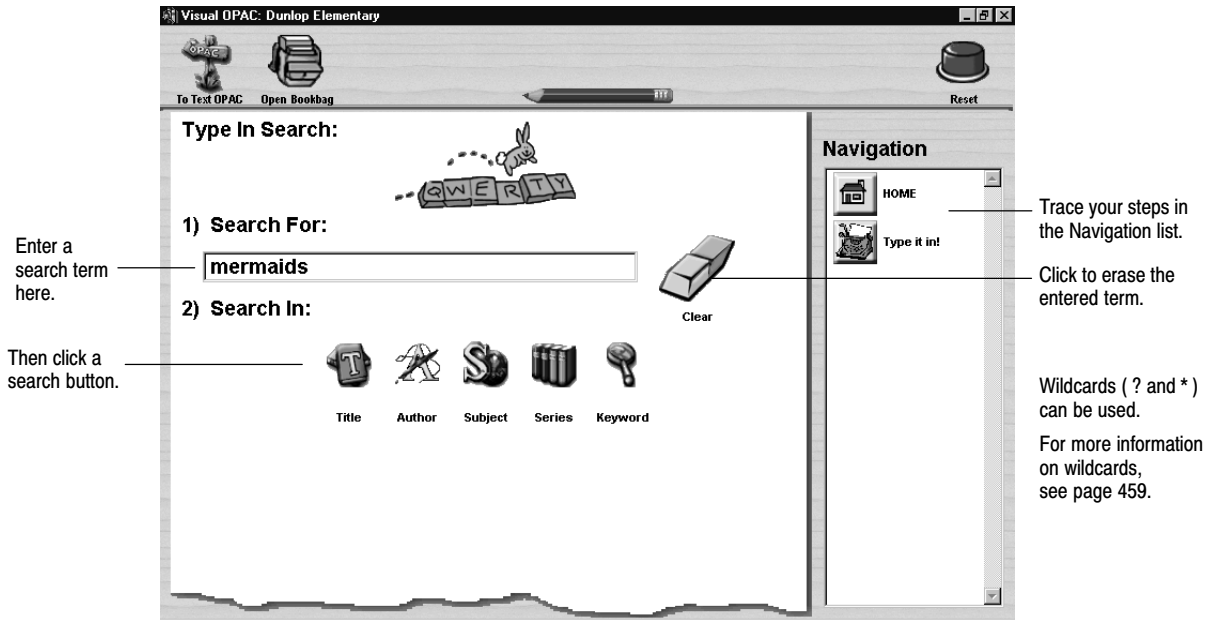
At the top is the Home button. Every time the patron moves to another button set, a selection list, or a record display window, a button representing that window is added to the Navigation list in top-down order. Using this list, the patron can see how he or she has progressed through the levels of the hierarchy, and can retrace their footsteps. The patron can click any button in the list to return to that window, or use the **ESC** key to return to the previous one.



The patron's searches are also added to the Search History window of the text interface. If you chose Let Patron Decide in Setup, the patron can change to the text interface and view the searches made in the visual interface. The Search History dialog lists any keyword searches as Power searches.

Using the Type In Search

Clicking an action button, configured to open the Type In Search, displays this window:



This is a simplified version of the text OPAC main window. The patron enters a term and clicks one of the search buttons (this window can be configured in Setup to show from one to all five search buttons). The patron must enter a complete word, but does not have to enter a complete term to produce results. The patron can also use wildcards (see page 459 for more information on these).

The Type In Search performs a keyword search in the title, author, subject, or series index, or if Keyword is selected, all indexes. In the text interface, the Search History dialog lists any Type In searches as Power searches.

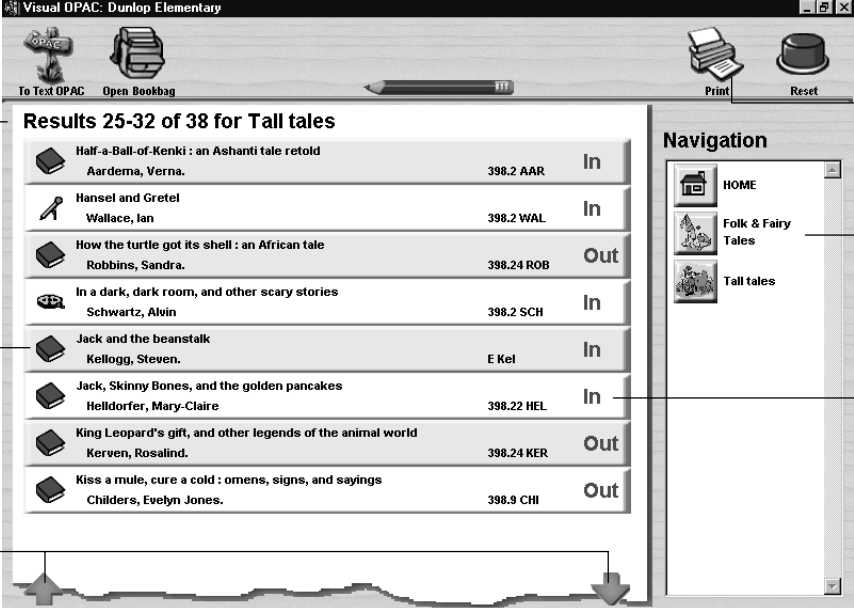
Examples:

The patron enters **HOUSE** and clicks the Title search button. The results include *Little house on the prairie* and *The napping house* as well as *The house cat*.

The patron enters **WALSH** and clicks the Author search button. The search results include books by Joan Walsh Anglund as well as those by Abigail M. Walsh.

Using the search results

When the patron clicks a button that is configured to search the collection, or uses the Type In Search window, a selection list of up to 500 results, sorted by title/author, appears:



The screenshot shows a web browser window titled "Visual OPAC: Dunlop Elementary". The main content area displays "Results 25-32 of 38 for Tall tales". The results are listed in a table with columns for material type icon, title, author, call number, and availability. A "Navigation" sidebar on the right shows a breadcrumb trail: HOME > Folk & Fairy Tales > Tall tales. At the bottom of the results list, there are up and down arrows for pagination. A printer icon is visible in the top right corner.

Annotations on the screenshot:

- View the total number of titles in the selection list. (Points to the "Results 25-32 of 38 for Tall tales" header)
- Click a button to see its record display. (Points to the "In" button for the first record)
- Click to page through the list. (Points to the up and down arrows at the bottom of the list)
- Click to print this portion of the list. (Points to the printer icon in the top right)
- Trace your steps in Navigation. (Points to the "Tall tales" link in the navigation sidebar)
- View the availability. If at least one copy is available, the button shows In. (Points to the "In" button for the second record)

| Material Type Icon | Title | Author | Call Number | Availability |
|--------------------|--|-------------------------|-------------|--------------|
| | Half-a-Ball-of-Kenki : an Ashanti tale retold | Aardema, Verna. | 398.2 AAR | In |
| | Hansel and Gretel | Wallace, Ian | 398.2 WAL | In |
| | How the turtle got its shell : an African tale | Robbins, Sandra. | 398.24 ROB | Out |
| | In a dark, dark room, and other scary stories | Schwartz, Alvin | 398.2 SCH | In |
| | Jack and the beanstalk | Kellogg, Steven. | E Kel | In |
| | Jack, Skinny Bones, and the golden pancakes | Heildorfer, Mary-Claire | 398.22 HEL | In |
| | King Leopard's gift, and other legends of the animal world | Kerven, Rosalind. | 398.24 KER | Out |
| | Kiss a mule, cure a cold : omens, signs, and sayings | Childers, Evelyn Jones. | 398.9 CHI | Out |



The selection list contains the material type icon, title, author, call number, and availability for each title. The patron can page through the list by clicking the Up and Down arrows. If enabled in Setup, the patron can print the displayed portion of the selection list:

| Dunlop Elementary | | |
|-------------------|---|--------|
| 10/13/2000 | Tall Tales | Page 1 |
| 1. | Author: Aardema, Verna. Title: Half-a-Ball-of-Kenki : an Ashanti tale retold Call Number: 398.2 AAR | |
| 2. | Author: Wallace, Ian Title: Hansel and Gretel Call Number: 398.2 WAL | |
| 3. | Author: Robbins, Sandra. Title: How the turtle got its shell : an | |

Viewing the record

Each of the entries in the selection list is an oversize button that, when clicked, opens the record display window. This window includes the material type icon, title, author, call number, and availability, plus the number of pages, annotations (505a, 511a, and 520a tags), and any reading program information (521, 526 tags).

The window also displays (if enabled on the Visual OPAC Setup tab) any hyperlinks (856 tags). Clicking on a hyperlink launches (if enabled on the General Setup tab) the browser and opens that Web page, file, or eBook. netLibrary eBooks, however, are not accessible in the visual interface.

See also: For more about the 856 tag in the OPAC, see page 466. For instructions on cataloging electronic resources, see page 355.



The Add to Bookbag button appears only in the record display window. Click it to add the item to the Bookbag. If you chose Let Patron Decide in Setup, the patron can move to the text interface and view the same Bookbag contents.

Click to add the item to the Bookbag.

The screenshot shows a web browser window titled "Visual OPAC: Dunlop Elementary". At the top, there are navigation buttons: "To Text OPAC", "Open Bookbag", "Add to Bookbag", "Print", and "Reset". The main content area displays "Result #29 out of 38 for Tall tales" and details for the book "Jack and the beanstalk" by Kellogg, Steven. The record includes the title, author, page count (28 p.), a brief description, and several hyperlinks: "Internet sites about folklore", "Jack and the beanstalk and Jack the giant-killer project", and "Accelerated Reader Level 3.6 0.50 Points Test 6122". A "Navigation" sidebar on the right lists "HOME", "Folk & Fairy Tales", "Tall tales", and "Title on: Tall tales". A scroll bar is visible at the bottom of the main content area.

Click to print the title information.

Trace your steps in the Navigation list.

View hyperlinks and reading program information.

Click to scroll through the records.



From the record display window, the patron can print the information for an individual record:

```

                                Dunlop Elementary
10/13/2000           Title Information           Page 1
-----
      Title: Jack and the beanstalk

      Author: Kellogg, Steven.

      Call Number: E Kel

      Availability: This title is IN.

      Size: 28 p.

      Description: A boy climbs to the top of a giant beanstalk,
                  where he uses his quick wits to outsmart a
                  giant and make his and his mother's fortune.

      Reading Program: Accelerated Reader Level 3.6  0.50 Points
                    Test 6122
```

This printout includes reading program information.

Using the Bookbag



From the record display window, the patron can add the item to the Bookbag (if enabled in Setup). The items are listed in order of addition. The Bookbag includes a counter and space for the patron to enter his/her name. It can be accessed from either the text or visual interface. In the visual interface, the Open Bookbag button appears in every window.

View the number of entries.
Enter the patron's name. It appears on the printout.



The screenshot shows a window titled "Bookbag" with a close button (X) in the top right. Below the title bar is a printer icon labeled "Print" and a text input field with a pencil icon. The main area displays "Bookbag for Amanda Sellers contains 2 items". The items are listed in a table:

| Item Icon | Title | Author | Call Number | Status |
|-----------|--|------------------|-------------|--------|
| | Ling-Li and the Phoenix fairy : a Chinese folktale | Greene, Ellin | 398.2 GRE | In |
| | Jack and the beanstalk | Kellogg, Steven. | E KEL | In |

On the right side of the window, there are four buttons: "Close Bookbag" (with a door icon), "Remove One" (with a printer icon), and "Remove All" (with a printer icon). A "Print" button is also visible at the top right.

Click to print the Bookbag contents.
Click to close the Bookbag.
Click to remove the highlighted title.
Click to remove all of the titles.

The patron can print the Bookbag contents (if enabled in Setup). The report lists, in the order chosen in Setup, the author, title, call number, and includes annotations (if enabled in Setup), and the patron's name in the title:

| | | |
|--------------------------|--|--------|
| Dunlop Elementary School | | |
| 10/13/2002 | Bookbag for Amanda Sellers | Page 1 |
| ----- | | |
| Author: | Greene, Ellin | |
| Title: | Ling-Li and the Phoenix fairy : a Chinese folktale | |
| Call Number: | 398.2 GRE | |
| | Retells a Chinese tale in which a girl's colorful wedding jacket is stolen and torn into pieces, which ultimately become the flowers we know as impatiens. | |
| Author: | Kellogg, Steven. | |
| Title: | Jack and the beanstalk | |
| Call Number: | E Kel | |
| | A boy climbs to the top of a giant beanstalk, where he uses his quick wits to outsmart a giant and make his and his mother's fortune. | |

Clearing the search station



When patrons finish searching, they can click the Reset Station button. This returns them to the home button set, empties the Bookbag, and clears the Navigation list and the Search History.

Chapter 36 Reports basics

This chapter provides a brief overview of Reports. It includes instructions for starting the application and the common tasks associated with generating reports, lists, notices, spine/pocket labels, and patron cards.

About Reports

Reports lets you use information collected during the daily circulation and cataloging activities to create an assortment of reports, lists, and notices. Using these reports, you can determine which copies are being heavily circulated, identify materials with incomplete MARC records, examine lists of missing copies or patrons with outstanding fines, and much more.

Reports divides the reports, lists, and notices into two groups:

- Cataloging reports are designed to help you maintain the library collection. They include reports for sorting your collection, identifying deficiencies in MARC records, and printing spine and pocket labels.
- Circulation reports are designed to help you manage and track transactions. They include statistics reports, patron cards, barcode lists and labels, and patron notices for overdues, fines, and items on hold.

The following table contains the reports, lists, labels, and notices included in Reports. For information on specific reports, see Chapter 37, “Cataloging reports,” and Chapter 38, “Circulation reports.”

Report list

| Groups | Reports |
|----------------------------|--|
| Cataloging reports | <ul style="list-style-type: none"> • Bibliography Report • Brief Records • Code Table List • Copies Added • Copies by Vendor / Funding Source • Copies With Different Call Numbers • Copies With Other Call Numbers • Copies Without Call Numbers • Copy Barcode Labels • Copy List by Circulation Type • Headings Without Authorities • Lexile Report • Shelf List • Spine Labels/Pocket Labels • Title List • Titles Added/Updated • Titles by Category • Titles With Duplicate Standard Numbers • Titles Without Copies • Titles Without Standard Numbers • Used/Unused Copy Barcodes Report |
| Circulation reports | <ul style="list-style-type: none"> • Category Statistics • Checkouts/Fines Transactions • Circulation Statistics • Collection Age by Call Numbers • Collection Age by Subject • Collection Statistics • Collection Value • Copy List by Status • Date Slips • Hold Notices • Hold Statistics • Hold Transactions Report • Inventory List by Call Number • Inventory List by Title • Overdue/Bill Notices • Overdue List • Patron Barcode Labels • Patron Barcode List • Patron Cards • Patron Name List • Patron Statistics • Used/Unused Patron Barcodes |

Note: If you have not installed Circulation Plus, you are limited to the Cataloging reports.

For Union Catalog Plus: You are limited to the Cataloging reports. In that section, the Titles by Category Report and the options to select by category or via PHD are not available. Most report dialogs have a Member button for limiting the information on the report to that of one member. Please see the following chapter for specific options and limitations.

Creating custom reports

There are a couple of options available to you for creating custom reports: extracting data from the database with the Extract Data option in Reports; and using SQL tools with the Follett ODBC Driver available on the installation CD-ROM. Both of these options allow you to access some of the fields in your patron and bibliographic databases and to export them for use in custom reports. This capability allows you to use the data from your database with other database or spreadsheet programs, where you may choose to create charts, reports, or other presentation materials.

Examples: Common reporting tasks might include:

- Locating patrons with missing or incomplete addresses by extracting patron data and filtering the address columns for blanks.
- Determining how many checkouts occur between 3:00 and 4:00 by extracting copy transaction data and analyzing the date and time columns.
- Seeing which students are actually reading books in the Geography category by checking the Extract Patron Data check box in System Setup, and then extracting category transaction data.
- Determining the number of patrons graduating in given years and graphing this information using any SQL capable reporting tool, database, or spreadsheet to access the config and patron databases, and using the graduation year and number of patrons to calculate percentages.

See also: Chapter 40 for more information on extracting data and the *Follett ODBC Driver Guide* for information on the FairCom ODBC Driver.

Starting Reports

From the computer desktop, open the Follett Applications folder and double-click the Reports icon.

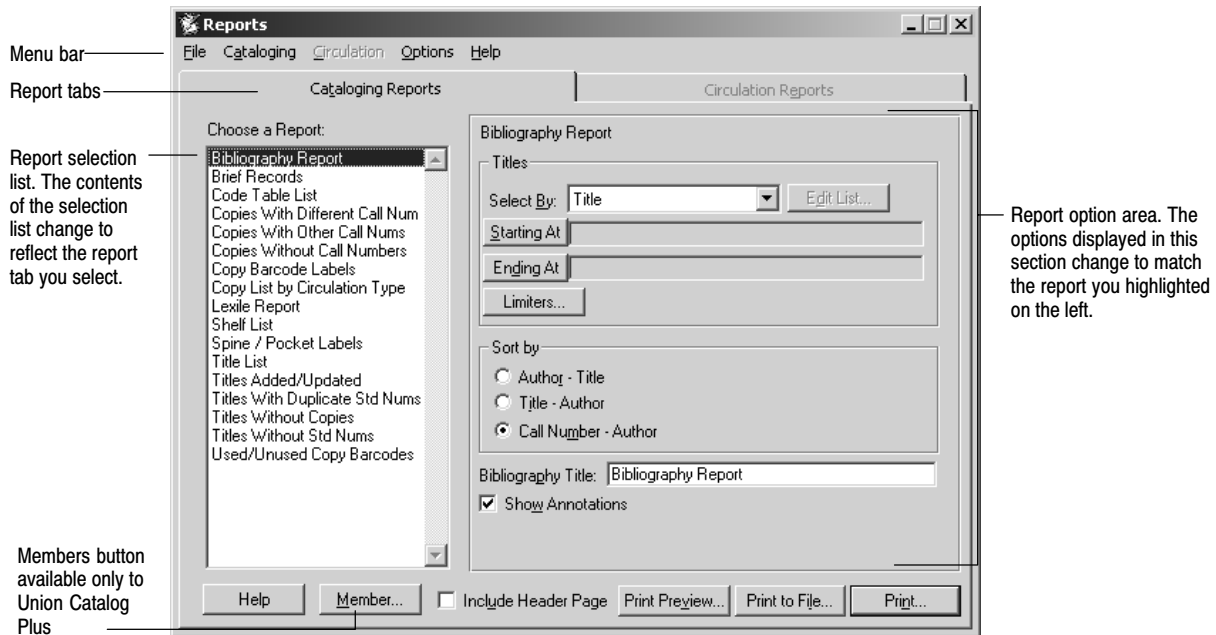
Note: You can also access the Follett Applications menu from the Windows Start | Programs menu or from the Mac OS Apple menu.

If you are using the password protection feature from System Setup to limit access to Reports, a password dialog appears. Type the Reports password and click OK.

Note: The default password for Reports is PRINTIT.

See also: For more information about password protection, see “Protecting your Follett applications with passwords” on page 40.

The Reports main window appears:



From the menu bar, you can access each report, list, and notice in Reports as well as the help topics:

- **File**—Contains the commands for printing and previewing your reports and closing Reports. At Mac OS workstations, this menu also includes a Page Setup command that lets you adjust your printer's page settings.
- **Cataloging**—Contains the commands used to access the specialized cataloging reports. The commands displayed on this menu are identical to the reports listed under the Choose a Report selection list on the Cataloging Reports tab. For information about the reports listed under this menu, see Chapter 37, "Cataloging reports." This menu is not available on Mac OS.
- **Circulation**—Contains the commands used to access the specialized circulation reports. The commands displayed on this menu are identical to the reports listed under the Choose a Report selection list on the Circulation Reports tab. For information about the reports listed under this menu, see Chapter 38, "Circulation reports." This menu is not available on Mac OS.
- **Options**—Contains the command to set the date for circulation reports. For more information, see "Changing the date used to run reports" on page 494.
- **Help**—Contains the commands used to access the help topics and glossary. From the About dialog, you can see product information for the application, the current number of patrons, titles, and copies in the system, and run the System Circulation Statistics and System Information Reports (see Chapter 39, "System reports").

Generating a report

Use the following sections to create any of the reports included with Reports.

Selecting a report

From the Reports main window, click on the Reports tab containing the desired report. The reports, lists, and notices displayed in the Choose a Report selection list change to reflect the tab you selected.

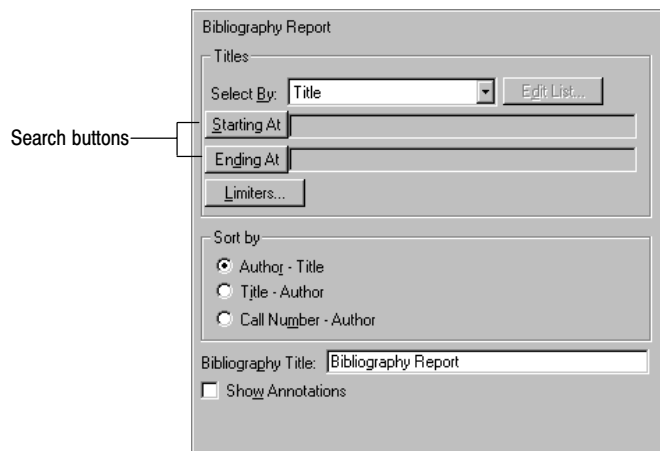
From the Choose a Report selection list, highlight the desired report, list, or notice. The option area on the right side of the Reports main window changes to match your selection.

Setting the report options

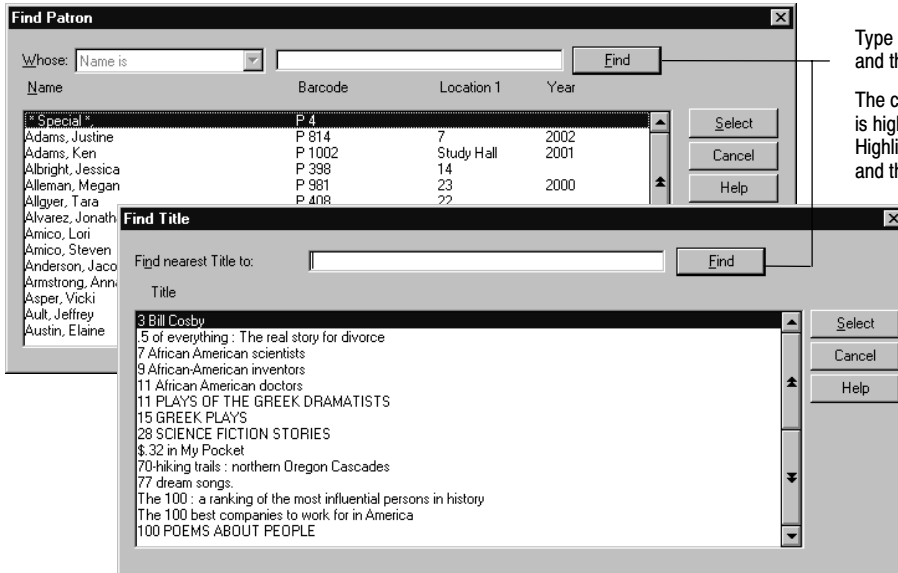
In the option area of the Reports main window, address the options for the selected report. The following sections provide instructions for the most common report options. For information on the options not covered here, see the specific report in Chapter 37, “Cataloging reports,” or Chapter 38, “Circulation reports.”

Defining a range

Most reports let you choose the way in which the database is sorted for the report. Click on the drop-down arrow next to Select By, and click on the method you prefer. (e.g., call numbers, categories, patrons, subjects, or titles). Then, limit the range that will be included in the report by clicking on the Starting At and Ending At search buttons.



A specific search dialog appears for the information in the report range. For example, if the report lets you limit the range of patrons in the report, the Find Patron dialog appears. If you can limit the titles, the Find Title dialog appears.



Type your search term in the text box, and then click Find.

The closest match to the search term is highlighted in the selection list. Highlight the desired patron or title, and then click Select.

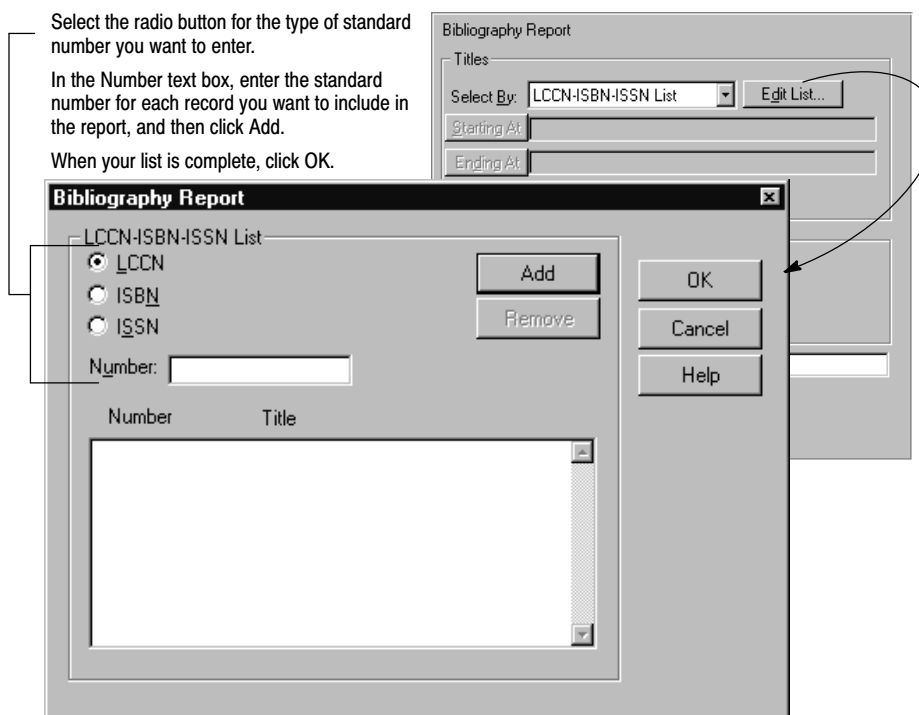
If you clicked Starting At, Reports highlights the first call number, category, patron, subject, or title in the library database. To jump to the beginning of the selection list, click an item on the list, and then press HOME. To skip to the bottom of the selection list, click an item on the list, and then press END.

If you do not select a starting and ending point, Reports displays a message asking if you want to include all the available records in the range.

If you select a range, and then decide to include all records in the report, either select the first and last item as the report range, or select another report from the report selection list, and then return to the desired report.

Building a standard number list

A few of the Cataloging reports let you limit their contents to specific titles by creating a list of standard numbers (LCCN, ISBN, and ISSN). In these cases, the report options area contains an Edit List button, which is enabled when you select LCCN-ISBN-ISSN List. To create or edit a standard number list, click Edit List. A standard number dialog appears for the report you're generating:



Important: You can enter ISBNs and ISSNs with or without hyphens. If you enter them without hyphens, the application adds them automatically. When entering an LCCN, you must either include the hyphen (e.g., 72-75015) or replace the hyphen with a zero (e.g., 72075015).

With a properly configured scanner, you can scan ISBN barcodes. Select the ISBN radio button, position your cursor in the Number text box, and then scan the barcode. A successful scan automatically adds the record to your list.

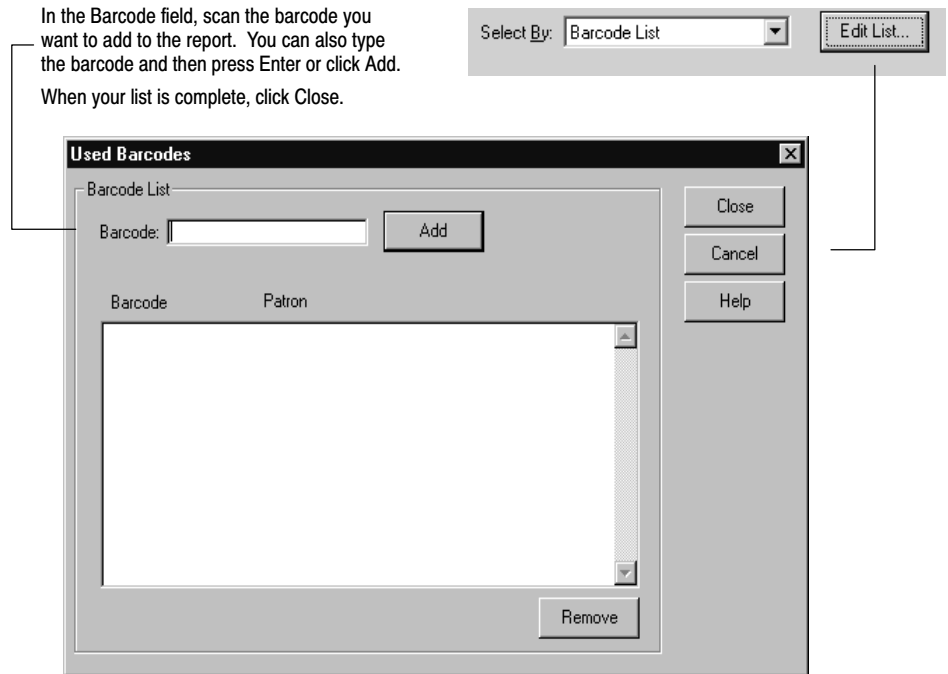
See also: For more information about configuring your scanner to read ISBN barcodes, see Appendix H, "Configuring scanners."

The standard number list lets you collect up to 100 different bibliographic records and can include all three types of standard numbers. If you decide not to include certain records, highlight the record on the selection list, and then click Remove. If you select LCCN-ISBN-ISSN List and do not create a list, Reports displays a message reminding you to create one.

For Union Catalog Plus: The member limiter isn't available when creating a list.

Building a barcode list

Some reports let you limit their contents to specific copies or patrons by creating a list of barcodes. These reports include Copy Barcode Labels, Spine/Pocket Labels, and Patron Barcode Labels. In these cases, the report options area contains an Edit List button, which appears when you select the option for Barcode List. To create a barcode list, click Edit List.

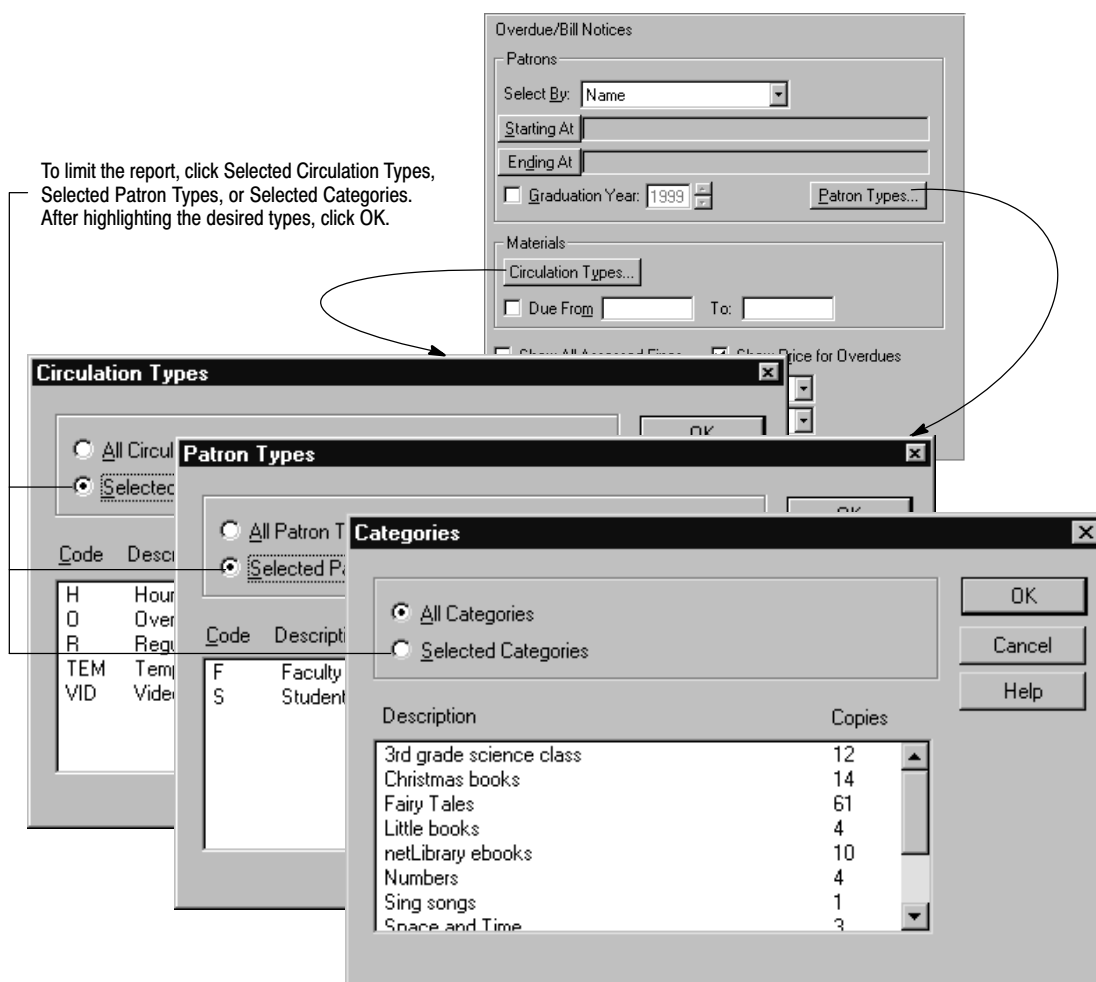


If you decide not to include certain barcodes, highlight the barcode(s) in the selection list, and then click Remove.

For Union Catalog Plus: This feature is not available in Union Catalog Plus.

Limiting by patron type, circulation type, or category

A few of the Circulation reports let you limit their contents to specific patron types, circulation types, or categories. In these cases, the report options area contains a Patron Types, Circulation Types, or Categories button. To limit the report to a specific patron type, circulation type, or category, click the button. The dialog appears for the information you're limiting:



The selection list contains the patron or circulation types created in System Setup and the number of patrons or copies belonging to each. For instructions on adding or removing patron and circulation types, see pages 69 and 76, respectively.

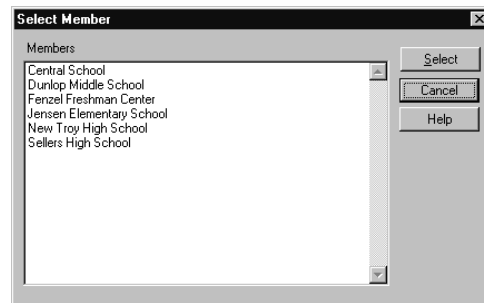
Note: Circulation types and patron types are labels, created and assigned by the library staff. Circulation types identify lending periods for copies in the library collection (see “Grouping your collection according to lending period” on page 45). Patron types identify specific groups of patrons (see “Grouping your patrons by type” on page 69).

See also: For information on the options for a specific report, see Chapter 37, “Cataloging reports,” or Chapter 38, “Circulation reports.”

Limiting by Union Catalog Plus member

Member...

In Union Catalog Plus, most of the reports can be limited by member. You can create a report on the entire union catalog database (the default), or limit it to information on one member. On the lower left side of the dialog, click on the Member button. The Select Member dialog appears. Highlight the desired member and click Select. All limiters, including the selected member, are cleared when you choose a new report. The printout will include the union catalog name and, if selected, the member name at the top of the report. The header page, also, will display the selected member.



Changing the date used to run reports

The Set Report Date option lets you calculate circulation statistics as of a past date by overriding the current system date. You can also use this feature to set a future date to project which items will soon be due or to print overdue/bill notices.

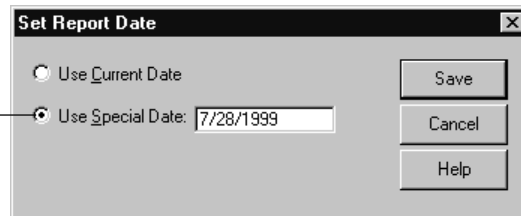
Options

Set Report Date...

From the Reports menu bar, select Options | Set Report Date. The Set Report Date dialog appears. To use a different date than the current date, select Use Special Date, type the new date, and select Save.

Note: If you set a date other than the current date, the following report areas will not be impacted: System Information Report, Patron Statistics (Total Patrons), Hold Statistics (Copies columns), Collection Value Report (Collection column), Collection Statistics (Collection column), Collection Age by Subject (Collection column), Collection Age by Call Number (Collection column), and Circulation Statistics (Total column).

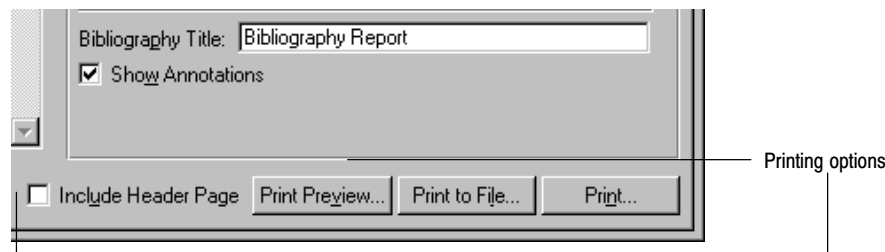
Regardless of the date specified here, all reports will continue to reflect the current number of patrons, titles, and copies in your database.



Important: Reports will continue using the special date for all reports until you return to the Set Report Date dialog and choose the Use Current Date option or exit Reports.

Printing the report

After selecting the options for the specific report, you're ready to print.



Include Header Page

By selecting the Include Header Page check box, you can print a brief description of the options used to create the report. The following image contains an example header page for a Bibliography Report:

```

                                Sunnydale Junior High
10/13/2000 @ 4:21pm                Bibliography Report
-----
Select By:  Title
Starting At: Abbey is missing
Ending At:  Alice in Wonderland
Material Types: All
Reading Level From: 6.0 To: 9.9
Interest Level From: 5-8 To: All Secondary
Publishing Year: Not Limited
Sort By: Author/Title
Bibliography Title: Bibliography Report
Show Annotations: Yes

```

If you are not certain the report will contain the information you want, you can click Print Preview to examine the entire report before actually printing it. The header page is not included in the previewed pages.

On Windows workstations, Print Preview generates the file with a .fpr extension. Reports associates this file extension with WordPad. WordPad is used to display the report. Macintosh workstations use a custom file viewer to display the report.

Note: Reports sends the report to the application using a specific page length. As a result, if you print the preview, the report page breaks may not be appropriate for your selected printer. Selecting either Print to File or Print after a print preview will require the report to be reprocessed.

If you want to edit the report, save the report to a file instead of producing a paper copy, and then use a word processing application, such as NotePad or WordPad, to make any necessary changes. Click Print to File. A Save As dialog appears for the specific report.

Enter the desired file name and location, and then click Save. A progress dialog appears while Reports generates the report. To view the report, start the application you identified as your report viewer, go to the directory containing

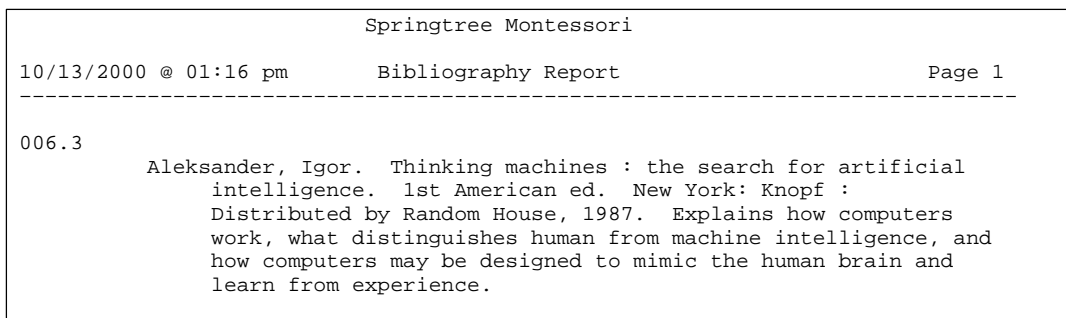
the saved report, and select the appropriate text file. Reports saves the report to file using a specific page length. As a result, if you use the Print to File option, and then later print the saved report, the report page breaks may not be appropriate for your selected printer.



To print the report, click Print. The Print Setup dialog appears.

See also: For more information about using the Print Setup dialog, see your operating system’s documentation or help.

Once you have made your selections and continue, a progress dialog appears while Reports generates the report. The report is sent to the workstation’s assigned printer. The following is an excerpt from a Bibliography Report:



While the exact contents of each report vary, the general format is similar. Most reports include a title section containing the library name you entered in System Setup (see page 35), the date and time you generated the report, and a description of the fields in the report.

Printing from a PHD

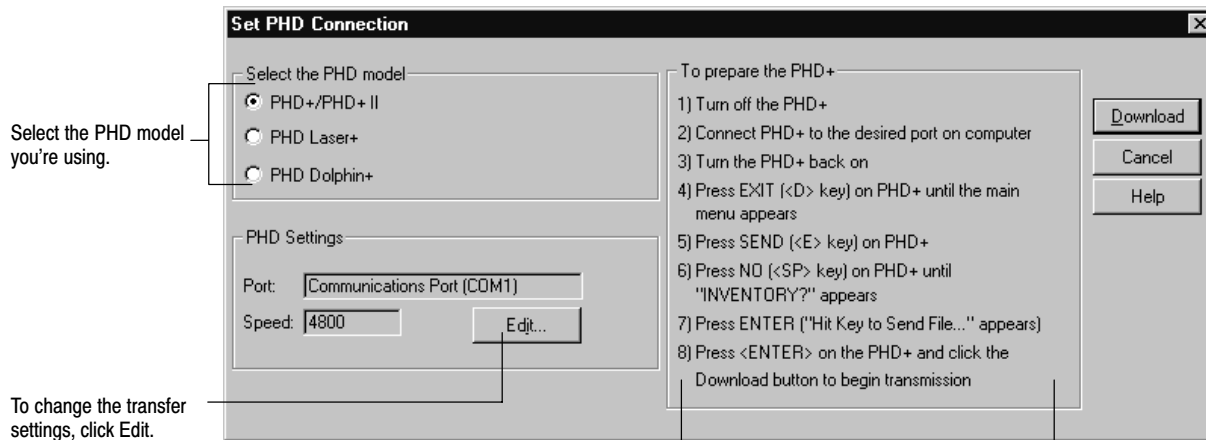
From Reports, you can generate a Bibliography Report, Title List, Patron Cards, or Patron Name List based on barcode scans stored in your PHD.

For Union Catalog Plus: This feature is not available.

1. With your PHD, scan the barcodes of the items or patrons you want to include in the report. For instructions on collecting item or patron scans with the PHD+, PHD+ II, or PHD Laser+, see “Collecting inventory, copy, or patron data” on page 663. To collect scans with a PHD Dolphin+, see “Collecting patron barcodes” on page 676 or “Collecting copy barcodes” on page 677.

When you finish collecting scans, connect your PHD to your computer. See the manufacturer’s documentation or Appendix E, “Using a PHD+, PHD+ II, or PHD Laser+,” or Appendix F, “Using a PHD Dolphin+,” for instructions.

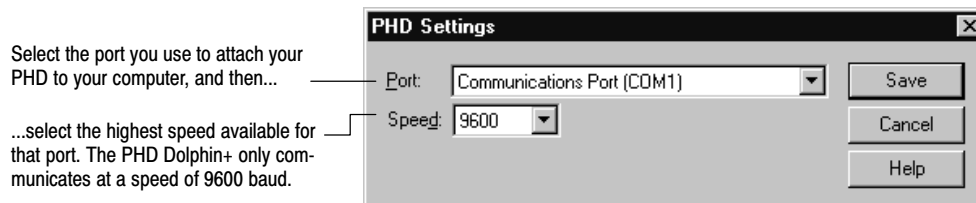
- From Reports, choose the report you want, select the “via PHD” option, and make any other desired changes to the report options. When you click one of the print options, the Set PHD Connection dialog appears:



These instructions change based on the PHD you choose.

Warning: To protect your equipment, make sure you turn off your PHD and computer before connecting or disconnecting the PHD.

- Select the PHD model you’re using. If you don’t need to change the transfer settings, skip to step 4. Otherwise, choose Edit. The PHD Settings dialog appears:



Set the port and speed for your PHD, and click Save.

- Once you’ve selected the correct PHD model and adjusted the PHD settings as desired, simply follow the instructions displayed on the dialog.

When you click Download, a progress dialog appears. When the download process ends, the application generates your report.

See also: For more information about the reports that can be created with your PHD, see “Generating a Bibliography Report” (page 502), “Generating a Title List” (page 525), “Generating Patron Cards” (page 572), and “Generating a Patron Name List” (page 575).

Notes

Chapter 37 Cataloging reports

This chapter contains instructions for printing the reports displayed on the Cataloging Reports tab.

Cataloging reports overview

The Cataloging reports are designed to assist you with maintaining the library collection. The following table contains a brief description of each report, list, and notice on the Cataloging Reports tab:

Cataloging reports

| Cataloging report | Description |
|---|---|
| Bibliography Report | Creates collection reports based on author, call number, category, series, subject, title, LCCN, ISBN, ISSN, or from a PHD. Use this report to generate reading lists for curriculum purposes or to promote certain titles (see page 502). |
| Brief Records | Identifies incomplete bibliographic records. Run this report to identify records in need of enhancement (see page 503). Note: Reports uses the definition you created in System Setup (see page 54) to identify the brief records in your collection. |
| Code Table List | Creates lists of the call number prefixes, categories, and circulation types used by the library. Use this report to provide your cataloging staff with current information on these areas (see page 504). |
| Copies Added | Creates a list of your copies for a specific acquisition date range. It can also be limited by a call number range. Use this report to see a list of new titles/copies added to your database (see page 506). |
| Copies by Funding Source or Vendor | Creates a list of your copies, grouped by funding source or vendor, or a list of funding sources or vendors. Use this report to review your acquisitions (see page 507). |
| Copies With Different Call Numbers | Identifies copies attached to a title that have a different call number than the one in the MARC record, or on another copy, or both. Run this report after updating or adding copies to the library database (see page 511). |
| Copies With Other Call Numbers | Identifies copies using undefined call number prefixes and copies without call numbers. Run this report after updating or adding copies to the library database (see page 512). |

Cataloging reports (Cont.)

| Cataloging report | Description |
|---|--|
| Copies Without Call Numbers | Identifies incomplete copy records. Run this report after adding or updating the copies in the library database (see page 513). |
| Copy Barcode Labels | Produces new or replacement copy barcodes in Follett Classic, Code 39, or Codabar symbologies (see page 514). |
| Copy List by Circulation Type | Identifies those copies that have been assigned the selected circulation type(s) (see page 516). |
| Headings Without Authorities | Generates a list of bibliographic records with name, subject, or series headings that do not have corresponding authority records. Use this report to correct bibliographic records or add authority records to your database (see page 517). |
| Lexile Report | Generates a list of copies in your collection that fall within a range of Lexile Measures. Use this report to generate reading lists based on Lexile Measure (see page 520). |
| Shelf List | Presents the copies in your collection in the order they should appear on the shelves. Use this report to locate books that are out of order or to compare the items on the shelves against the results of an inventory (see page 521). |
| Spine/Pocket Labels | Creates spine and/or pocket labels for a selected range of copies. Use this feature to print new or replacement labels (see page 522). |
| Title List | Presents the titles in your collection based on title, author, series, standard number, subject, or titles in a PHD. Use this report to avoid ordering duplicate copies or to compare against the results of an inventory or an export (see page 525). |
| Titles Added/Updated | Presents a list of titles added and/or updated during a selected time period (see page 529). |
| Titles by Category | Creates lists of titles associated with specific categories. Use this report to create reading lists based on categories or to promote areas of your collection (see page 530). |
| Titles With Duplicate Standard Numbers | Identifies bibliographic records which may have been improperly cataloged. Run this report after adding or updating the records in the library database (see page 531). |
| Titles Without Copies | Identifies bibliographic records for weeding or improperly cataloged records. Run this report before updating the library database, after adding or enhancing records, or before running Global Delete Titles Without Copies (see page 533). |

Cataloging reports (Cont.)

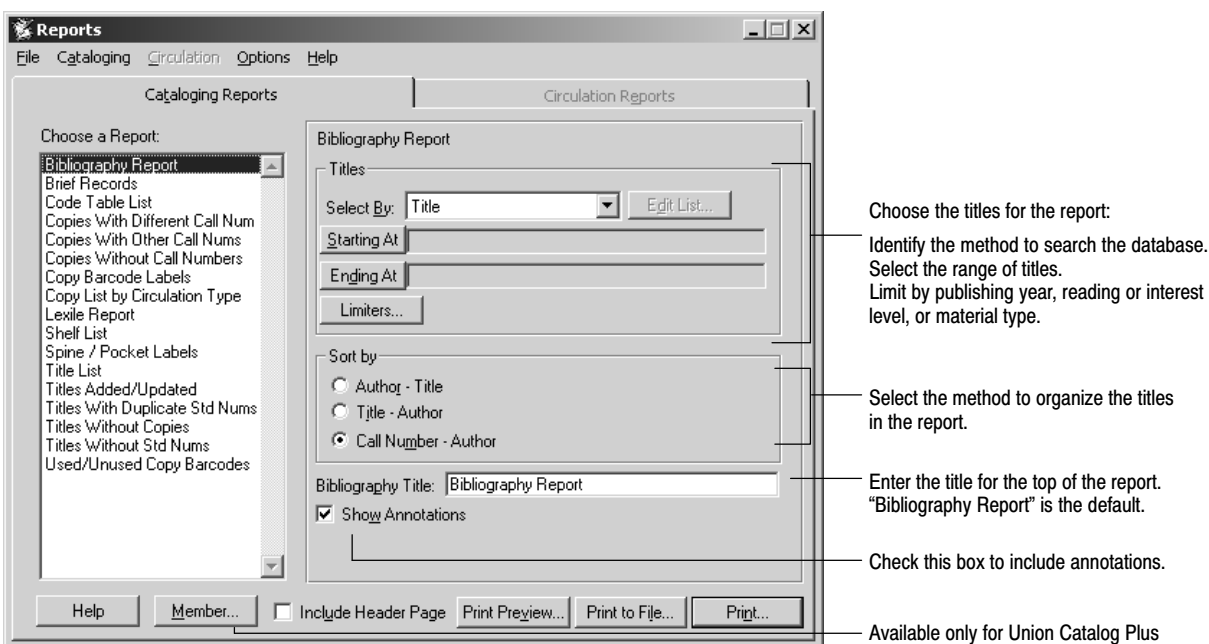
| Cataloging report | Description |
|--|--|
| Titles Without Standard Numbers | Identifies incomplete bibliographic records. Run this report before enhancing your records with a retrospective conversion, import, or Alliance Plus Autorecon, or after adding or updating the titles in the library database (see page 534). |
| Used/Unused Copy Barcodes | Identifies available or used copy barcodes. Run the report before adding new copies to the library database (see page 535). |

See also: The Cataloging module maintains a Weeding log. It adds information to the log about each copy deleted in the Cataloging module. For more information, see page 344.

Generating a Bibliography Report

The Bibliography Report lets you create a list of titles based on specialized criteria. Use this report to create a list of titles on specific subjects for use as a reading list or as a tool for promoting certain titles in the library collection.

For Union Catalog Plus: Category and Titles via PHD options are not available.



The Bibliography Report contains the following options:

- **Titles:** To identify the method to search the library database, select it from the list. If you select LCCN/ISBN/ISSN List, click Edit List to add or remove numbers. For instructions on building lists, see page 491.

Select the range of titles you want to include in the report.

For instructions on selecting the starting and ending records, see page 489.

To filter out titles by publishing year, reading or interest level, or material type, click Limiters. For information about using limiters, see page 241. Limiters are not available if you're selecting by call number or category.

- **Sorting:** Choose the sort order of the report.
- **Formatting:** Enter a report title, and choose whether to include annotations in the report. The annotations are taken from subfield *_a* of the 505, 511, and 520 tags of the MARC record.

After selecting your report options, click Print.

See also: For a detailed explanation of the printing process, see "Printing the report" starting on page 495. For instructions on collecting copy scans with the PHD+, PHD+ II, or PHD Laser+, see "Collecting inventory, copy, or patron data" on page 663. To collect copy scans with a PHD Dolphin+, see page 677.

The following is an excerpt from a Bibliography Report:

Reports uses the copy call number you entered when you created the copy record (see page 285).

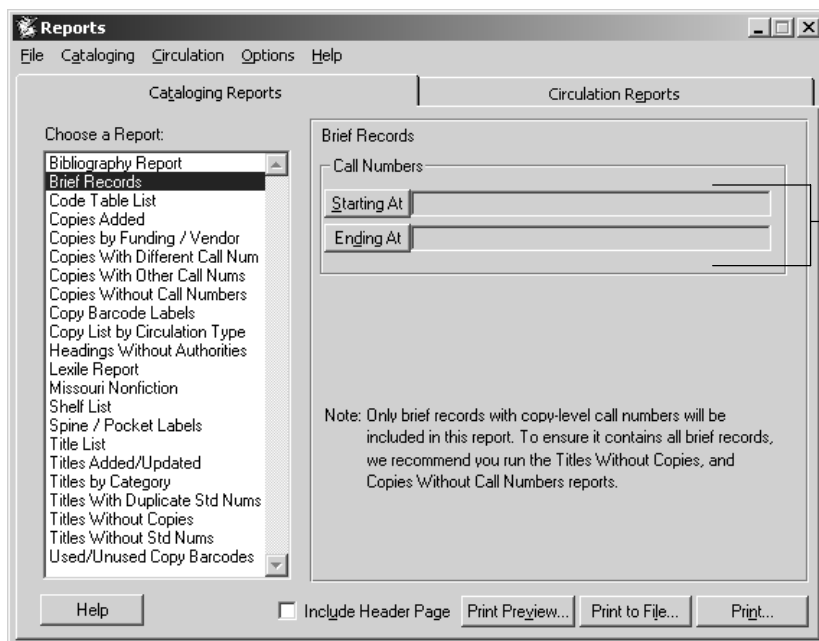
```

                                Jackson Middle School Library
                                Bibliography Report
10/13/2003 @ 3:28pm                                                    Page 1
-----
591.5 Sec
    Secrets of animal survival.  Washington, D.C. : National
    Geographic Society, c1983.  Describes the specific physical
    adaptations of animals to five different types of
    environments including Arctic and Antarctic, desert, rain
    forest, savanna, and mountain.
  
```

Generating a Brief Records Report

The Brief Records Report identifies titles with incomplete MARC records. Use this report to create a list of records to enhance using FSC's retrospective conversion process, an Alliance Plus Autorecon, or manual cataloging. Make sure each brief record in this report has at least one standard number. Circulation Plus and Catalog Plus use standard numbers to prevent you from inadvertently importing duplicate titles. Additionally, the Alliance Plus Autorecon feature won't process any bibliographic record without a standard number. You may want to run this report before adding, enhancing, or importing records.

Note: Reports uses the definition you created in System Setup (see page 54) to identify the brief records in your collection.



Select the range of call numbers for the report. For instructions on selecting the starting and ending records, see "Defining a range" on page 489.

After selecting your report options, click Print.

The following is an excerpt from a Brief Records Report:

Reports retrieves only brief records that have a copy with a call number. To ensure this report contains all brief records, run the Titles Without Copies and the Copies Without Call Numbers Reports.

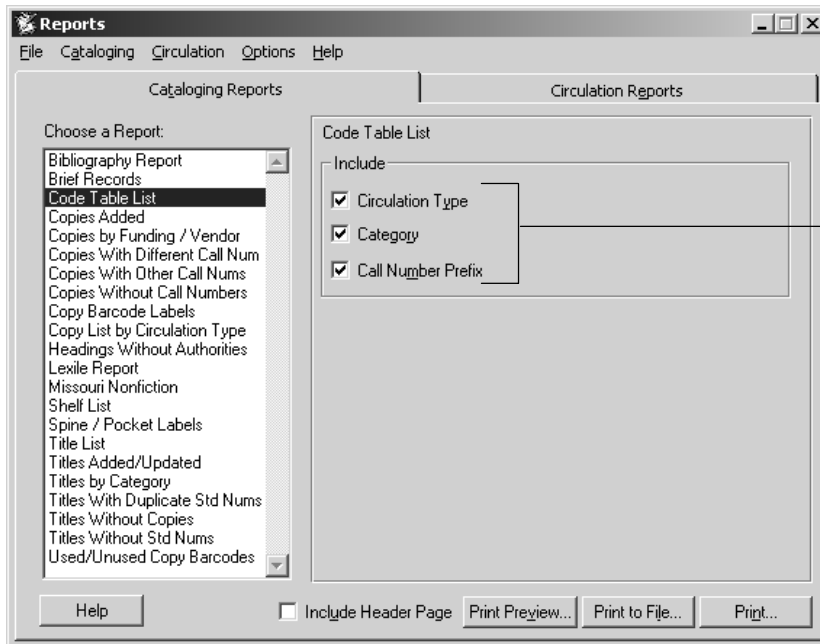
| Jackson Middle School Library | | | |
|-------------------------------|-------------------|----------------|-------|
| 10/13/2003 @ 3:43pm | Brief Records | Page 1 | |
| Call Number | Title | LCCN/ISBN/ISSN | Type |
| E SPA Spanjian, Beth | Baby Brontosaurus | 0-516-09565-X | Books |

Displays the item's material type. Reports retrieves this information from the Leader tag in the title's MARC record (see page 268).

Generating a Code Table List

Circulation Plus/Catalog Plus use three library-specific labels to organize your collection: call number prefixes, circulation types, and categories. Reports comes with a tool for keeping track of the assorted labels and prefixes you use. Use this report to supply your staff with a list of your current call number prefixes, circulation types, and categories.

See also: For more information about call number prefixes, circulation types, and categories, see Chapter 3, "Preparing to catalog your collection."



After selecting your report options, click Print.

See also: For a detailed explanation of the printing process, see "Printing the report" starting on page 495.

The following is an excerpt from a Code Table List:

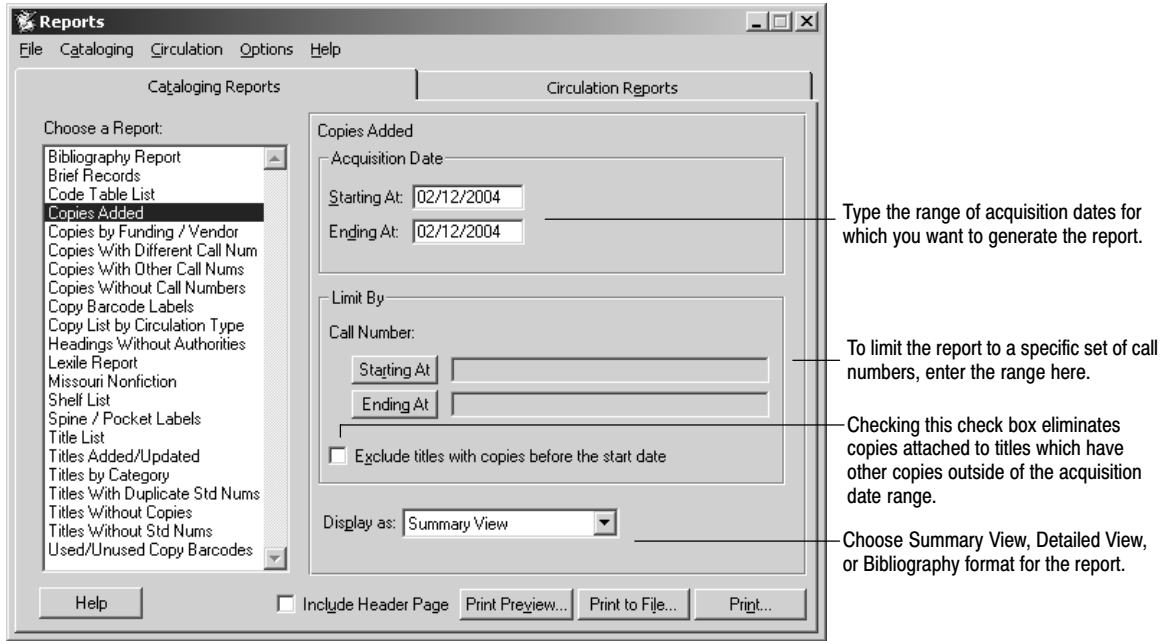
| Jackson Middle School Library | | |
|-------------------------------|-----------------------|--------|
| 10/13/2003 @ 3:47pm | Code Table List | Page 1 |
| CODE | DESCRIPTION | COPIES |
| CIRCULATION TYPE | | |
| *NC | Non-circulating eBook | 58 |
| R | Regular | 108 |
| TEM | Temporary | 12 |

For Union Catalog Plus: When <All Members> is selected, the call number prefixes for the union catalog print on the first page, and each member's circulation types and categories print on separate pages. If a single member is selected, only its circulation types and categories print. The union catalog and member names print at the top of the appropriate pages.

Generating a Copies Added Report

The Copies Added Report presents a list of copies added in your collection during a selected time period. The report is a good way to generate a list of newly added items to post for your patrons or to report on items purchased and received during a given period of time.

For Union Catalog Plus: This report is not available.



After selecting your report options, click Print.

See also: For a detailed explanation of the printing process, see “Printing the report” starting on page 495.

The following is an excerpt from a Summary View of the Copies Added Report:

| Central Columbia M. S. Library | | |
|--------------------------------|---|----------------|
| 2/13/2004 @ 6:24am | Copies Added | Page 1 |
| Call Number | Title | Author |
| FIC ROW | Harry Potter and the Order of the Phoenix | Rowling, J. K. |
| Titles Added: 1 | | |
| Copies Added: 1 | | |

The following is an excerpt from a Detailed View of the Copies Added Report:

| Central Columbia M. S. Library | | | |
|---|----------------|---------|----------------|
| 2/13/2004 @ 6:23am | Copies Added | | Page 1 |
| ----- | | | |
| Call Number | | | Author |
| Title | | | |
| Acq. Date | Barcode | Price | |
| ----- | | | |
| FIC ROW | | | |
| Harry Potter and the Order of the Phoenix | | | Rowling, J. K. |
| 9/13/2003 | 3397600065825B | \$16.00 | |
| Titles Added: 1 | | | |
| Copies Added: 1 | | | |
| Total Cost : \$16.00 | | | |

The following is an excerpt from a Copies Added Report using the Bibliography format:

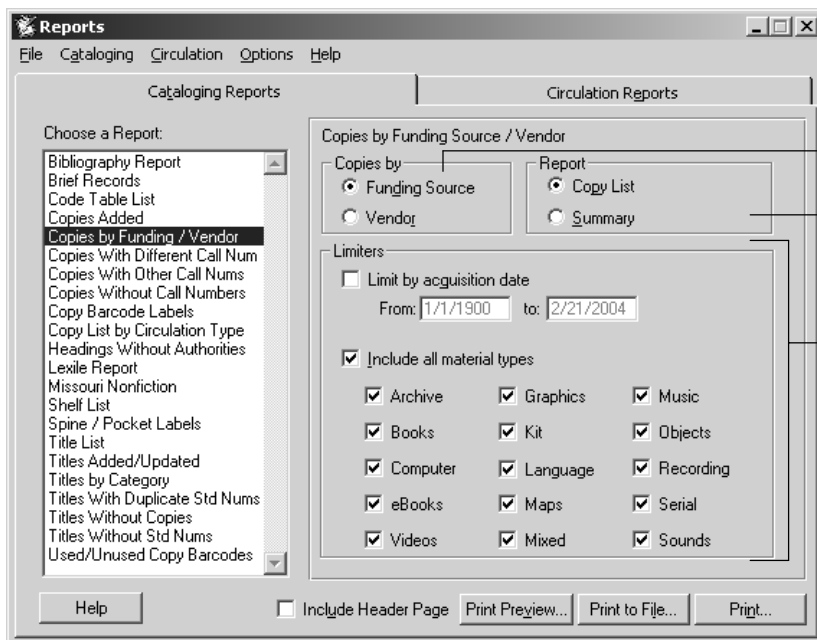
| Central Columbia M. S. Library | |
|--|--------|
| 2/13/2004 @ 6:22am | Page 1 |
| ----- | |
| FIC ROW | |
| Rowling, J. K. Harry Potter and the Order of the Phoenix. | |
| Unabridged. New York : Listening Library, p2003. | |
| Performance by Jim Dale. Harry Potter, now a fifth-year student at Hogwarts School of Witchcraft and Wizardry, struggles with a threatening teacher, problematic house elf, the dread of upcoming final exams, and haunting dreams that hint toward his mysterious past. | |
| Titles Added: 1 | |

Generating a Copies by Funding Source or Vendor Report

The Copies by Funding Source or Vendor Report provides either detailed or summary information about your funding sources or vendors. You can use the copy list to identify the copies purchased with certain funds or from certain

vendors. In summary form, you can see your total acquisitions (copies and prices) for each funding source or vendor.

For Union Catalog Plus: This report is not available.



Identify the type of report you want.

Select the content of the report.

Limit the report by acquisition date or material type.

The Copies by Funding Source or Vendor Report contains the following options:

- Funding Source or Vendor: Choose the report you want.
- Report: Choose Copy List or Summary:

Select Copy List for a list of your copies grouped by funding source or vendor. Copies within each group are listed in call number order. Each line item in the Copy List includes the call number, title, acquisition date, material type, standard number, barcode, and price of the copy.

Select Summary for a list of your funding sources or vendors, the total number of copies purchased with the fund or from the vendor, the number of those copies without prices, and the totals for the prices in the copy records.
- Limit by acquisition date: Limiting the report to a date range lets you see what you acquired in a specific time period.
- Include material types: You can include one, some, or all material types. This allows you to find out, for example, where you purchased videos and the total expenditure for them.

After selecting your report options, click Print.

See also: For a detailed explanation of the printing process, see "Printing the report" starting on page 495.

This excerpt is from a Copy List by Vendor Report, limited by material type:

| Dunlop Elementary School | | | | | |
|----------------------------|---------------------------|-------|---|-------------------|----------|
| 5/3/2002 @ 7:59am | Copies by Vendor | | | | Page 1 |
| ----- | | | | | |
| Vendor | | | | | |
| Call Number | Acq. Date | Type | Title LCCN/ISBN/ISSN | Barcode | Price |
| ----- | | | | | |
| FOLLETT MEDIA DISTRIBUTION | | | | | |
| VID 551.46 BLU | 1/19/2001 | Films | The blue planet : seas of life 0789482657 | 33976000339391 | \$14.98 |
| VID 574.5 Pri | 5/2/2002 | Films | Primer of the universe with R. Buckminster Ful | 33976000522869 | \$39.95 |
| VID 629.454 ADV | 4/30/1996 | Films | Adventures in space : journey to the Moon | 33976000588723 | \$79.95 |
| VID 915.97 Pag | 6/11/1999 | Films | Viet Nam's unseen war : pictures from the other 0500781166 | 33976000238741 | \$19.98 |
| | | | | Total Price: | \$309.72 |
| | | | | Number of Copies: | 4 |
| LIBRARY VIDEO | | | | | |
| VID 599 Wha | The whales that came back | | | | |

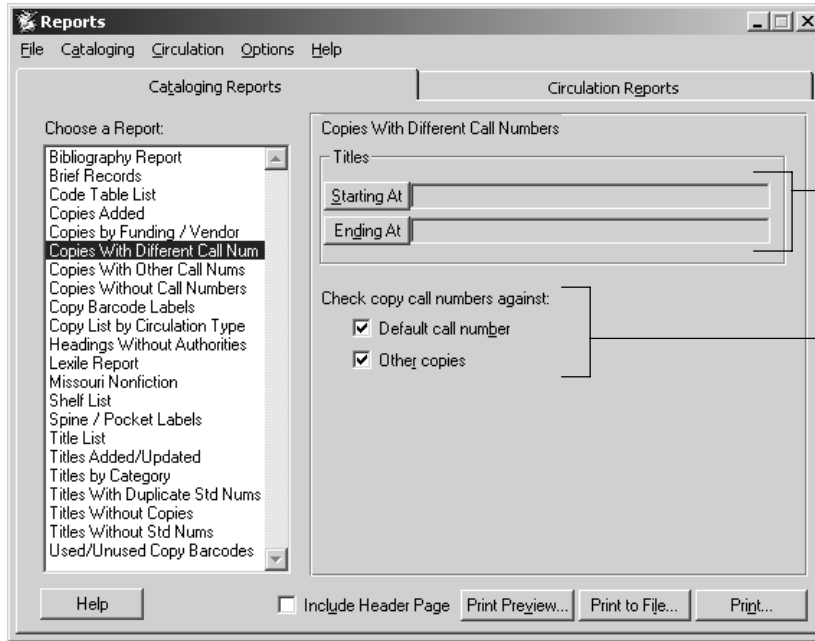
This excerpt is from a Summary by Vendor (Vendor List) Report:

| Vendor List | | | |
|------------------------------------|--------|---------------------|-------------|
| Vendor | Copies | Copies w/o price | Total Price |
| Follett Library Resources | 4 | 0 | \$309.72 |
| Library Video | 3 | 3 | \$0.00 |
| Marshall Cavendish | 16 | 5 | \$809.45 |
| **PBS Video | 29 | 2 | \$2394.87 |
| Steck-Vaughn | 8 | 1 | \$645.95 |
| *** indicates a non-indexed Vendor | | | |

Note: In either report, the name of some of your funding sources or vendors may be preceded by two asterisks (**). If so, these are non-indexed entries. That is, previous to our 5.0 software version, funding sources and vendors were text entries in the copy record (852_xFUND and 852_xFSC@f). For version 5.0, we created the Acquisitions module. It includes editable indexed tables that replace the drop-down lists in the Copy Editor. To add your existing funding sources and vendors to the new tables, generate this report choosing Summary, then go to page 327 in the chapter, "Maintaining your collection," to perform a global update.

Generating a Copies With Different Call Numbers Report

The Copies With Different Call Numbers Report lets you search your collection for copies that may have been assigned an incorrect call number. You can use the report to check the various call numbers assigned to the copies of one title. This can be a handy way to create a call number-based bibliography for your patrons to assist them in finding items on the shelf.



Select the range of titles you want to include in the report. For instructions on selecting the starting and ending records, see "Defining a range" on page 489.

Select the source against which you want to check the copy call numbers.

After selecting your report options, click Print.

See also: For a detailed explanation of the printing process, see "Printing the report" starting on page 495.

The following is an excerpt from a Copies With Different Call Numbers Report:

| | |
|--|--|
| Reports retrieves the default call number from the location specified in System Setup (see page 47). | Displays the item's material type. Reports retrieves this information from the Leader tag in the MARC record (see page 268). |
|--|--|

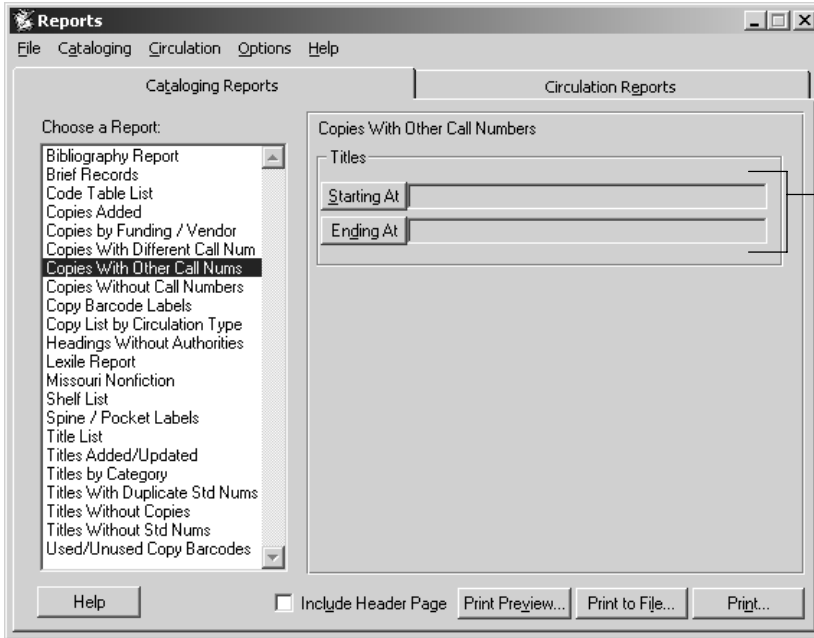
| | | |
|-----------------------------------|------------------------------------|--------|
| Jackson Middle School Library | | |
| 10/13/2003 @ 3:49pm | Copies With Different Call Numbers | Page 1 |
| ----- | | |
| Title | Def Call # | Author |
| | Call Number | Type |
| | | Count |
| ----- | | |
| The New Encyclopaedia Britannica. | | |
| R 031 | ENCYCLOPEDIA | Books |
| R 031 | ENC V19 | 1 |
| R 031 | ENCYCLOPEDIA | 27 |

Reports uses the copy call number you entered when you created the copy record (see page 286).

For Union Catalog Plus: This report includes a Member column to identify the owner of each copy.

Generating a Copies With Other Call Numbers Report

The Copies With Other Call Numbers Report identifies copies using the “Other” (OTH) call number prefix. Circulation Plus uses this prefix to collect circulation statistics on any copy with an unrecognized call number prefix. If you use call number prefixes to organize titles by subject matter, or if you want to collect circulation statistics based on call number prefixes, we recommend correcting these records.



Select the range of titles for the report. For instructions on selecting the starting and ending records, see “Defining a range” on page 489.

After selecting your report options, click Print.

See also: For a detailed explanation of the printing process, see “Printing the report” starting on page 495.

The following is an excerpt from a Copies With Other Call Numbers Report:

| | |
|---|--|
| Reports retrieves the default call numbers from the location specified in System Setup (see page 47). | Displays the item’s material type. Reports retrieves this information from the Leader tag in the title’s MARC record (see page 268). |
|---|--|

```

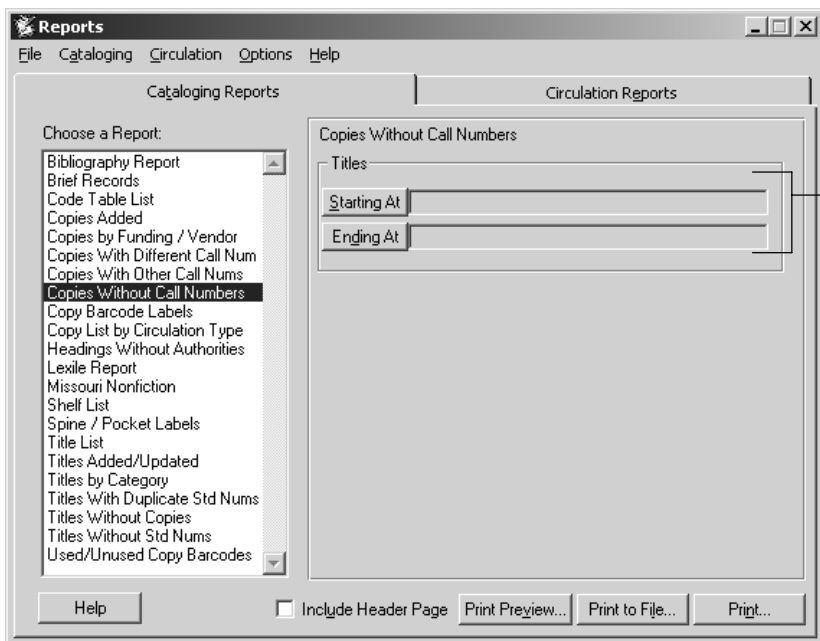
Jackson Middle School Library
10/13/2003 @ 3:58pm  Copies With Other Call Numbers  Page 1
-----
Title
Def Call #          Type
Call Number        Barcode          Price  Circ Type
-----
Charlie Brown & Charlie Schulz; in celebration of the 2 Mendelson, Lee.
  B SCHULZ (MENDELSON)          Books
  BIO SCHULZ                    T 18417          $6.95  Regular
  
```

Reports uses the copy call number you entered when you created the copy record (see page 286).

For Union Catalog Plus: This report includes a Member column to identify the owner of each copy.

Generating a Copies Without Call Numbers Report

The Copies Without Call Numbers Report lets you locate incomplete copy records. Copy records without call numbers won't appear on the Shelf List and can't be located during call number searches or processed by the Alliance Plus Autorecon or Process Misses features. Copies without call numbers may also impact circulation statistics. If Circulation Plus doesn't find a call number associated with the copy, it adds the statistics for the copy to the "Other" call number prefix. Run this report after adding or enhancing your copy records.



Select the range of titles for the report.
For instructions on selecting the starting and ending records, see "Defining a range" on page 489.

After selecting your report options, click Print.

See also: For a detailed explanation of the printing process, see "Printing the report" starting on page 495.

The following is an excerpt from a Copies Without Call Numbers Report:

Reports retrieves the default call numbers from the location specified in System Setup (see page 47).

Displays the item's material type. Reports retrieves this information from the Leader tag in the title's MARC record (see page 268).

| Jackson Middle School Library | | | |
|--|-----------------------------|-------|---------------|
| 10/13/2003 @ 4:04pm | Copies Without Call Numbers | | Page 1 |
| Title | Def Call # | Type | Author |
| | Barcode | Price | Circ Type |
| ----- | | | |
| Isadore the dinosaur / by Tom LaFleur and Gale Brennan | | | LaFleur, Tom. |
| E LAF | | Books | |
| T 88018 | | 5.00 | Regular |
| T 88017 | | 5.00 | Regular |

For Union Catalog Plus: This report includes a Member column to identify the owner of each copy.

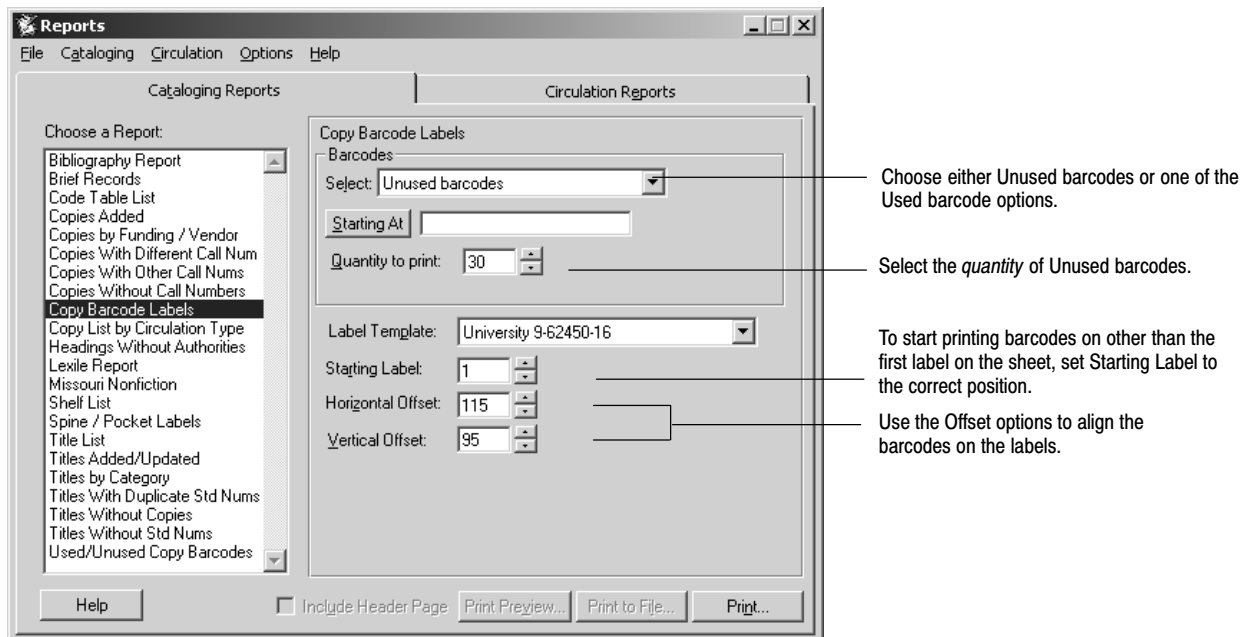
Printing Copy Barcode Labels

Copy Barcode Labels lets you create new or replacement barcodes for your copies. It prints your full site name (retrieved from System Setup | Site | Identification), the scannable barcode, and the eye-readable barcode number.

Important: This feature is intended for use on laser, not inkjet, printers.

The application takes your barcode symbology from System Setup | Site | Barcodes | Library Materials. If your symbology is Code 39 (generic, or Mod 10, 11, or 43) or Codabar (generic or Mod 10), the barcodes print in that symbology. If your symbology is anything else, the barcodes print in the Code 39 symbology. Even though the symbology may be different, your scanner and/or PHD can read the barcodes.

Note: If Catalog Plus is installed on a server and not on your workstation, you (or your technician) must install the barcode fonts to your workstation before printing barcodes. To do so, insert the Installation disk into your CD drive, click on the Workstation tab, highlight Barcode Fonts for Reports, and click Install. On a Mac OS workstation, run the Workstation Installer and check the Barcode Fonts box. Your Macintosh restarts when the installation is complete.



For Union Catalog Plus: You must first choose a member from the Member list. Used barcodes by Barcode List, Used barcodes by Acquisition Date, and Used barcodes by Standard Number List options are not available.

Copy Barcode Labels has these options:

- Barcodes: Select a method for identifying barcodes to be printed.

If you select Unused Barcodes, press Starting At, and choose either your highest barcode or the last barcode before a gap in your barcode sequence. Then enter the number of barcodes (up to 990) that you want to print.

If you select Used Barcodes, press Starting At and Ending At to select the range of barcode numbers that you want. The application prints only the barcode numbers in use within that range; it skips any unused barcode numbers. For instructions on selecting the starting and ending numbers, see page 489.

If you select Used barcodes by Acquisition Date, enter the starting and ending date range.

If you select Used barcodes by Barcode List or Used barcodes by Standard Number List, click Edit List to add or remove numbers. For instructions on building lists, see page 492.

- **Label Template:** The label stock used for barcodes has 30 labels per sheet, 3 across and 10 down. Each label is 2 5/8" by 1". It is available from Follett Software Company, product # 75032 (1-800-323-3397, www.fsc.follett.com), or from University Products, Inc., product # 9-62450-16 (1-800-628-1912, www.librarysuppliers.com).
- **Starting Label:** To start printing on other than the first label on the sheet, set Starting Label to the correct position. Reports counts labels from left to right/top to bottom. For example, to start printing on the first label of the third row, set Starting Label to 7.
- **Offsets:** Use the offset options to fine-tune the printing alignment. The horizontal and vertical offsets let you adjust the left and top margins, respectively. Each increment is equal to 1/10th of a millimeter. The offsets required vary from printer to printer. These offsets are in addition to the unprintable area defined in your printer's properties.

Important: Before you print from a Mac OS workstation, you must also select File | Page Setup and choose the 8.5" x 11" paper with the smallest margins (approximately .17" left/right and .11" top/bottom). Depending on your printer, you may also have to select the option for a larger print area. Please note that the page setup reverts to its default settings when you close Reports.

After selecting your options, click Print.

The first time you print barcodes at a workstation, print a few samples on plain paper, and do the following:

- Make sure that the barcode is centered on the label. (Scanners require some white space at either end of the vertical barcode lines.) If not, adjust the offsets and try again. When you print, Reports saves the offset settings you used on the workstation so that you do not have to set them again.
- Make sure that your scanner and/or PHD can read the barcodes. The quality of the printout varies from printer to printer; some older printers cannot produce scanner-readable barcodes. We performed all testing using laser

printers. In addition, the type of scanner and the maximum width of its laser beam affect its ability to read the barcodes.

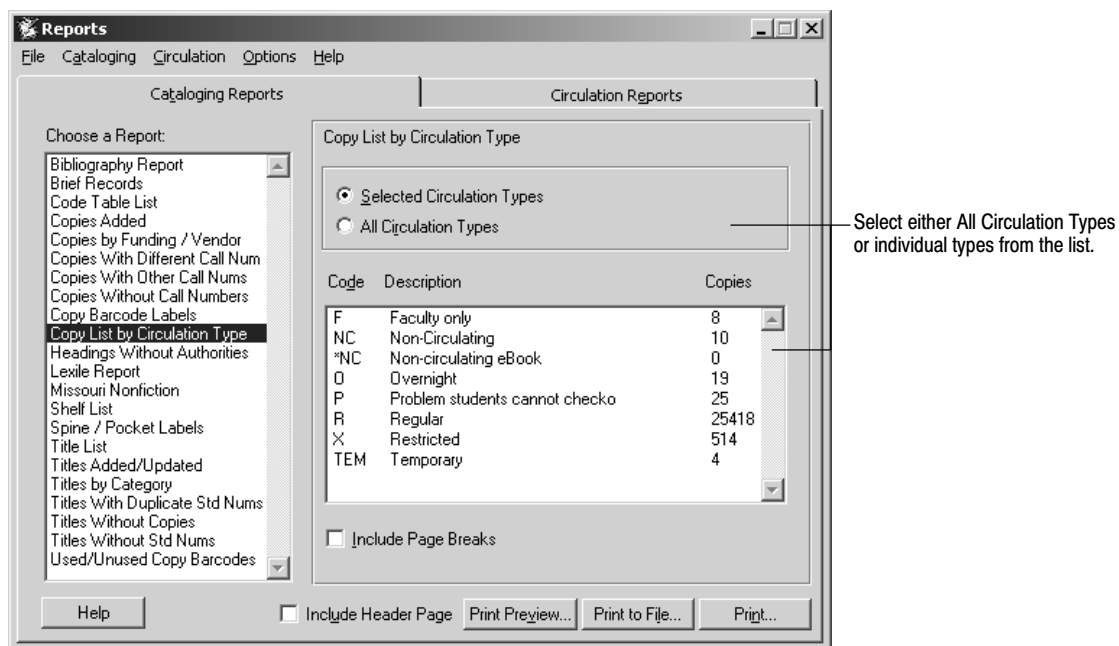
Generating a Copy List by Circulation Type

The Copy List by Circulation Type identifies copies that have a particular circulation type (or types) assigned to them. Run this report for assistance when removing or changing circulation types or loan periods.

To select the circulation type(s) for the report, highlight one or more in the list. They are listed in alphabetical order by description.

To select *all* of your circulation types, select the All Circulation Types button.

For Union Catalog Plus: You must first choose a member from the Member list. The member's name then appears in the report title.



After selecting your report options, click Print.

See also: For a detailed explanation of the printing process, see "Printing the report" starting on page 495.

The report sorts the copies first by circulation type (if you selected more than one), and then by call number. It includes the total number of copies for each circulation type.

The following is an excerpt from a Copy List by Circulation Type Report:

| Jackson Middle School Library | | |
|-------------------------------|---|----------------|
| 10/13/2003 @ 3:49pm | Copy List by Circulation Type | Page 1 |
| Circulation Type | Title | Barcode |
| Call Number | | |
| Overnight | | |
| 520 MIT | The Scholastic encyclopedia of space | 33976000658122 |
| 940.53 HOG | Encyclopaedia of the Second World War | 33976000694732 |
| REF 031 ENC | Britannica book of the year | T 649162 |
| REF 912 MAC | Macmillan centennial atlas of the world | 33976000647901 |
| Copies Listed: 4 | | |

Generating a Headings Without Authorities Report

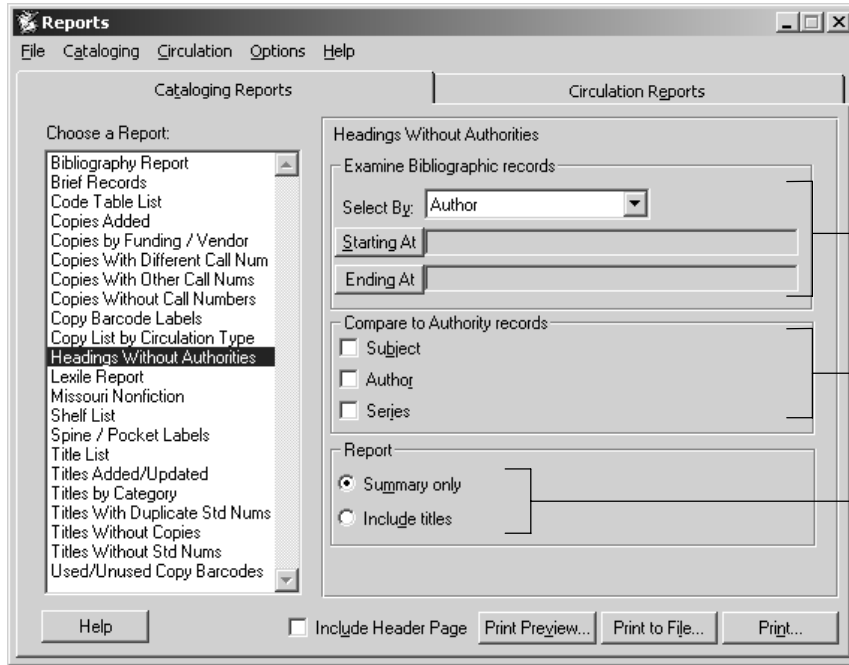
This report finds the name, subject, or series headings in your bibliographic records that do not have corresponding authority records.

Use this report when creating authority records or adding 4xx tags to them. Use it also to discover those bibliographic records that may need corrective editing. You may want to generate this report after importing new bibliographic records or when supporting classroom curricula. For more information about authority records, see page 639 in Appendix B.

To correct your bibliographic records, consider using the Global Update Headings feature in Cataloging (see page 324). This helps you to improve the consistency of the author, subject, and series headings in your database. A complete authority file supports your patrons' search efforts by providing cross-references to additional resources in your collection.

To create a meaningful Headings Without Authorities Report, your database must already contain both bibliographic and authority records.

For Union Catalog Plus: This report is not available.



Choose the records you want to examine:
Identify the method to search the database.
Then, select the range.

Choose the type(s) of headings
you want to examine.

To limit the report to a list of headings,
choose Summary only.
To include the titles,
choose Include titles.

The Headings Without Authorities Report contains the following options:

- **Bibliographic records:** Select the method for searching the database—Author, Title, Call Number, Subject, or Date Added/Updated. Then select the range of records that you want to examine. If you select to search the database by Date Added/Updated, enter the desired date and time range. For instructions on selecting the starting and ending ranges, see page 489.
- **Headings:** Select the type(s) of headings in your bibliographic records that you want compared to your authority records.

If you choose this heading type... these tags in your bibliographic records are examined:

| | |
|----------------|---|
| Subject | 600, 610, 611, 630, 650, 651, 655, 658, 690-699 |
| Author | 100, 110, 111, 700, 710, 711, 790, 791 |
| Series | 400, 410, 411, 440, 490, 800, 810, 811, 830 |

The process compares the selected bibliographic tags to the following tags in your authority records: 100, 110, 111, 130, 150, 151, 155.

- **Summary only:** The summary report lists the headings in your bibliographic records that do not have corresponding headings in your authority records and a total count, for each heading, of those bibliographic records.

- Include titles: This detailed report includes, for each heading, a list of the titles in your bibliographic records that do not have the corresponding authority records.

After selecting your report options, click Print.

See also: For a detailed explanation of the printing process, see “Printing the report” starting on page 495.

The following is an excerpt from a Headings Without Authorities Report in summary form:

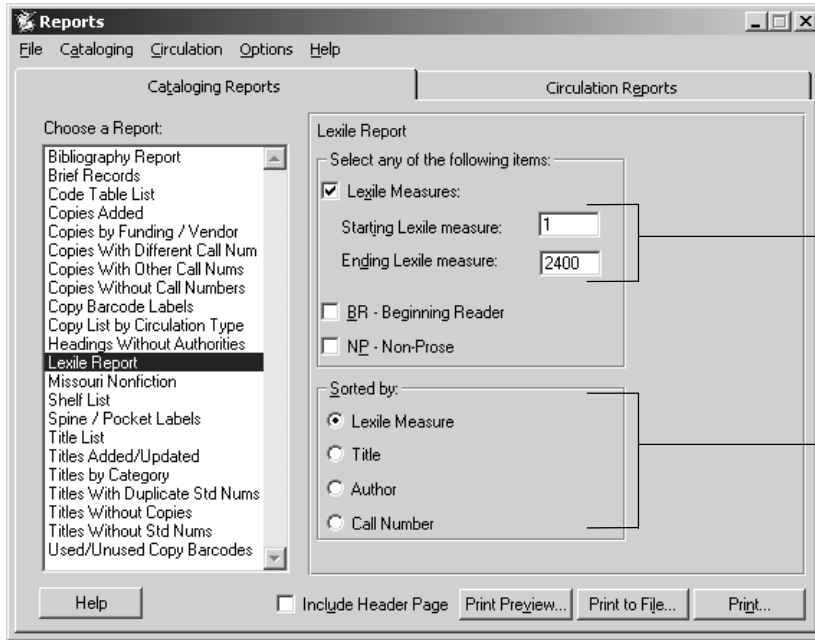
| | | |
|---|---|------------------|
| 10/13/2003 @ 4:06pm | Jackson Middle School Library Headings Without Authorities | Page 1 |
| ----- | | |
| Heading Type | | |
| Heading | | Number of Titles |
| Title | | |
| ----- | | |
| Subject (600, 610, 611, 630, 650, 651, 655, 658, 690-699) | | |
| Cars | | 3 |
| Pioneer life | | 2 |
| Poetry--Selections | | 2 |

The following is an excerpt that includes titles:

| | | |
|---|---|------------------|
| 10/13/2003 @ 4:06pm | Jackson Middle School Library Headings Without Authorities | Page 1 |
| ----- | | |
| Heading Type | | |
| Heading | | Number of Titles |
| Title | | |
| ----- | | |
| Subject (600, 610, 611, 630, 650, 651, 655, 658, 690-699) | | |
| Cars | | 3 |
| A century at Indy | | |
| DK big book of cars | | |
| The Dusenbergs : a study of quality engineering | | |
| Pioneer life | | 2 |
| Buffalo Bill : frontier daredevil | | |
| Daniel Boone : young hunter and tracker | | |

Generating a Lexile Report

The Lexile® Report allows you to specify a range of Lexile measures and generate a list of copies that fall within that range. You can also search for items in the Beginning Reader (BR) and Non-Prose (NP) categories, which do not have numeric Lexile measures. Reports can be sorted by title, author, call number, or Lexile measure.



Select the range of Lexile measures for the report.

Choose the sort order of the report. The default is by Lexile Measure.

After selecting your report options, click Print.

See also: For a detailed explanation of the printing process, see "Printing the report" starting on page 495.

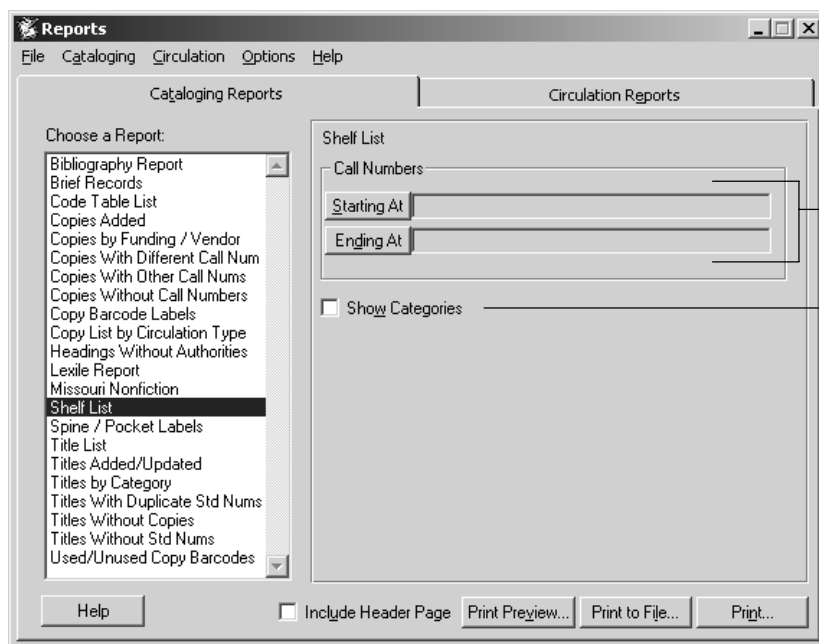
For Union Catalog Plus: This report includes a Member column to identify the owner of each copy.

The following is an excerpt from a Lexile Report sorted by Lexile measure:

| 10/13/2003 @ 8:44am | | Lexile Report | | Page 1 |
|--------------------------------------|-----------------|---------------|--------|--------|
| ----- | | | | |
| Lexile | | | | |
| Title | Author | | Lexile | |
| Call Number | | | | |
| ----- | | | | |
| 10 | | | | |
| Pass the Fritters, Critters E CHA | Chapman, Cheryl | | 10 | |
| See the Yak Yak 428.1 GHI | Ghinga, Charles | | 10 | |

Generating a Shelf List

The Shelf List presents the copies in your library collection in the order they should appear on the library shelves (call number, author, and title). If you want to use this list to compare against the results of an inventory, we suggest you run it before starting the inventory process.



Select the range of call numbers you want to include in the report. For instructions on selecting the starting and ending records, see “Defining a range” on page 489.

To include the categories assigned to each copy in the report, select the Show Categories check box.

Note: For more information about categories, see page 52.

After selecting your report options, click Print.

See also: For a detailed explanation of the printing process, see “Printing the report” starting on page 495.

The following is an excerpt from a Shelf List:

| Call Number | Title | Price | Circ Type |
|------------------------------|-------------------------|-------------------------|-----------|
| Barcode | Year | Category | |
| Category | | | |
| 001.53 | Artificial intelligence | | |
| T 21051 | 1995 | 5.00 | Regular |
| 2: Family Donations | | 11: Math and Philosophy | |
| 5: Ms. Youndt's Summer Books | | | |

Reports uses the copy call number you entered when you created the copy record (see page 286).

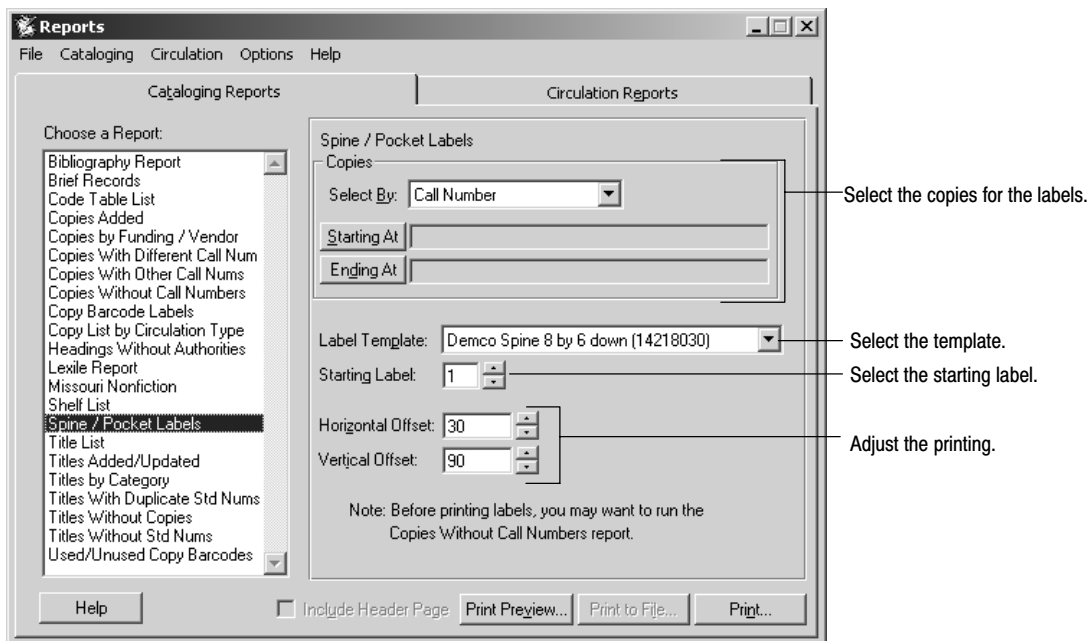
This field contains the publication date of the copy. Reports retrieves this information from the 008 or 260 tag of the MARC record.

For Union Catalog Plus: This report includes a Member column to identify the owner of each copy.

Generating Spine/Pocket Labels

Spine/Pocket Labels lets you print labels based on a range of call numbers, barcodes, or acquisition dates. You can also print labels based on a list of barcodes or standard numbers. The labels display a copy's call number and any copy or volume numbers included in the copy record.

For Union Catalog Plus: If you choose Select by Barcode, you must also choose a member from the Member list. Barcode List and Standard Number List options are not available.



The Spine/Pocket Labels contain the following options:

- **Copies:** Select the method for searching the database. If you choose Call Number, Acquisition Date, or Barcode, then select the range you want to print. For instructions on selecting the starting and ending ranges, see page 489.

If you select Barcode List or Standard Number List, click Edit List to add or remove numbers. For instructions on building lists, see page 492.

Important: A label is printed for each copy in the range, even if it doesn't have a call number. To avoid wasting label stock, run a Copies Without Call Numbers Report (see page 513) and correct any copy records before printing the labels.

- **Label Template:** Select the one that matches your label stock. Reports identifies spine/pocket label stock by the number of labels across and down a sheet. For more information, see the table on page 523.
- **Starting Label:** To have your labels start printing on a label other than the first one on the sheet, set this to the label number where printing should

begin. Reports counts labels from left to right, then top to bottom. For example, to start printing on the first label of the second row of “8 across, 6 down” label stock, set Starting Label to 9.

- **Offsets:** Use these options to fine-tune the alignment. The horizontal and vertical offsets let you adjust the left and top margins, respectively. Each increment is equal to 1/10th of a millimeter. The offsets for each template vary from printer to printer. The first time you use a label template at a workstation, print a few tests on plain paper to insure that the offsets are aligned correctly.

The table (below) provides approximate offsets for each template. When you print, Reports saves the offsets used for that template to the workstation. Please note that the offsets you define for spine/pocket labels are in addition to the unprintable area defined in your printer’s properties.

| Template | | | | Horizontal | Vertical | Labels |
|------------------|-------------------------|-------------|---------|------------|-----------|--------|
| Vendor | Type | Item Number | Offset* | Offset* | per sheet | |
| Demco | Spine 8 by 6 | 14218030 | 30 | 90 | 45 | |
| Demco | Spine 8 by 7 | 14218020 | 20 | 20 | 56 | |
| Demco | Spine 5 by 11 | 14216170 | 110 | 90 | 55 | |
| Demco | Spine 10 by 10 | 14216190 | 80 | 90 | 100 | |
| Demco | OCLC 4 | 14216850 | 30 | 90 | 10 sets | |
| Demco | Three across** | 14216180 | 185 | 15 | 12 sets | |
| Follett Software | Laser Spine 8 by 6 | 65061S | 40 | 90 | 48 | |
| University | OCLC 4 | 342-SL4L | 40 | 90 | 10 sets | |
| University | OCLC 6 | 342-OS6DL | 50 | 160 | 8 sets | |
| University | Laser Spine 8 by 6 | 9-62450-12 | 40 | 90 | 48 | |
| University | Three across | 9-62450-15 | 130 | 100 | 10 sets | |
| University | Pinfeed: OCLC 4** | 377-OL4D | 80 | NA | NA | |
| University | Pinfeed: OCLC 6** | 377-OS6D | 80 | NA | NA | |
| University | Pinfeed: Three across** | 377-2000 | 150 | NA | NA | |

* Estimates only. Actual horizontal and vertical offsets vary from printer to printer.

** Pinfeed and Demco Three across label templates are not available on Mac OS.

After selecting your report options, click Print.

Important: The horizontal/vertical offsets aren't applied or saved when you choose Print Preview or Print to File. If you print spine/pocket labels from a preview window or saved file, the labels won't be positioned correctly.

Important: Before you print from a Mac OS workstation, you must also select File | Page Setup and choose the 8.5" x 11" paper with the smallest margins (approximately .17" left/right and .11" top/bottom). Depending on your printer, you may also have to select the option for a larger print area. Please note that the page setup reverts to its default settings when you close Reports.

See also: For a detailed explanation of the printing process, see "Printing the report" starting on page 495.

Label stock for spine/pocket labels is available from the following vendors: University Products Inc. (1-800-628-1912, <http://www.librarysuppliers.com>) and Demco, Inc. (1-800-356-1200, <http://www.demco.com>).

The following is a sample of spine labels by call number, created with the "Demco Spine Label, 8 by 7" template:

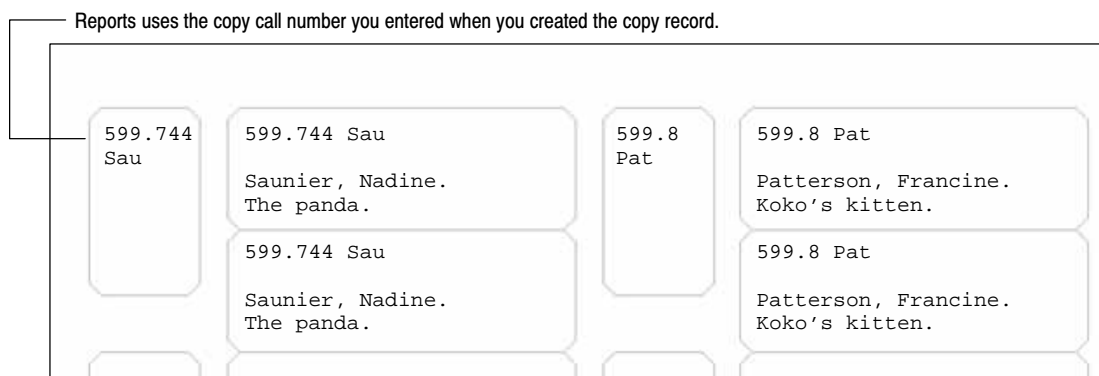
Reports uses the copy call number you entered when you created the copy record.

Displays the volume number. Reports retrieves volume numbers from copy records with enumeration descriptions of "volume", "vol.", "vol.", "v.", or "V".

| | | | | | | | |
|----------------------|--------------|---------------|---------------|---------------|---------------|-----------------------|-----------------------|
| 567.9 MAT c. 2 | 567.9 MAT | 567.91 BEN | 567.91 DIX | 567.91 ELT | 567.91 JEU | 567.91 LAN v. 1 | 567.91 LAN v. 2 |
| | | | | | | | |

Displays the copy number. Reports retrieves this information from the copy record's Copy Number field.

The following is a sample of spine and pocket labels by call number, created with the "OCLC 4" template:

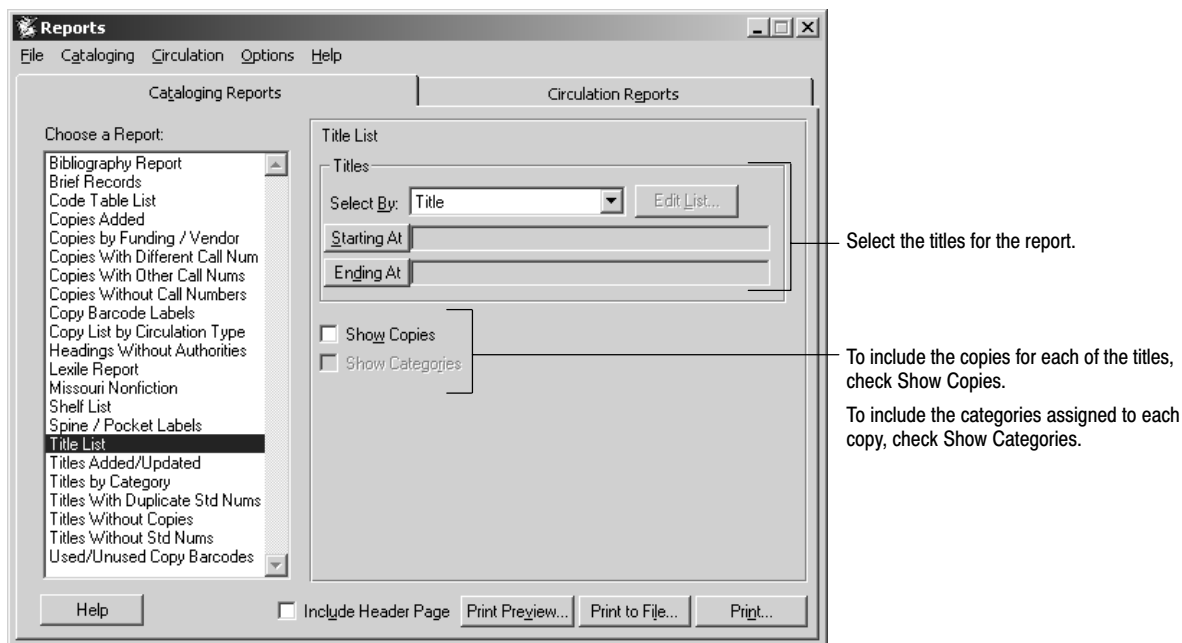


See also: For information on adding and editing copy records, see Chapter 24, "Working with copies."

Generating a Title List

The Title List presents a range of titles in your collection based on title, author, series, standard number, subject, or barcodes stored in a PHD. You can check this list against a book order to avoid ordering duplicate titles or to compare to an inventory. If you are going to use it to check against an inventory, make sure you run the Title List before starting the inventory process. You can also use the Title List to create a list of books whose copy barcodes were collected with a PHD. This is especially useful when also using the scans for exporting the MARC records via PHD (see page 312).

For Union Catalog Plus: Titles via PHD is not available. On any of the other choices, if you check the Show Copies check box, the report includes a Member column to identify the owner of each copy.



The Title List contains the following options:

- **Titles:** Select the method for searching the database. Then select the range of titles that you want included on the report. If you select LCCN/ISBN/ISSN List, click the activated Edit List button to build a list of standard numbers (see page 491). For instructions on selecting the starting and ending ranges, see page 489.
- **Copies:** To include copy information for each of the titles, check Show Copies.
- **Categories:** To include the copy categories, check Show Categories. This option isn't available unless you first select the Show Copies check box. To learn more about categories, see page 52.

After selecting your report options, click Print.

See also: For a detailed explanation of the printing process, see "Printing the report" starting on page 495.

For instructions on collecting copy barcodes with the PHD+, PHD+ II, or PHD Laser+, see "Collecting inventory, copy, or patron data" on page 663. To collect copy scans with a PHD Dolphin+, see page 677.

The following is an excerpt from a Title List based on Title:

Displays the item's material type. Reports retrieves this information from the title's MARC record Leader tag (see page 268).

| Jackson Middle School Library | | | | | |
|-------------------------------|----------------|-------|----------|--------|----------------------|
| 10/13/2003 @ 1:19pm | Title List | | | | Page 1 |
| Title | LCCN/ISBN/ISSN | Type | Barcode | Price | Author |
| Call Number | Category | | Category | | Circ Type |
| 77 dream songs. | | Books | | | Berryman, John, 1914 |
| 64014107 //r | | | T 18000 | \$2.63 | |
| 811 BERRYMAN | | | | | Regular |
| Titles listed: 1 | | | | | |

Note: The Titles via PHD Report is the same as the Title List by Title, except that the titles are in the order in which they were scanned into the PHD.

The following is an excerpt from a Title List based on Author:

| Jackson Middle School Library | | | | | |
|-------------------------------|------------------------|---------------------|------------|----------------|-----------|
| 10/13/2003 @ 1:20pm | Title List - By Author | | | | Page 1 |
| Author | Title | Author | Price | LCCN/ISBN/ISSN | Type |
| Call Number | Category | Barcode | Category | | Circ Type |
| Faber, Doris, 1924- | | | | | |
| Love & rivalry : three exce | | Faber, Doris, 1924- | | 83006566 /AC | Books |
| 920 FABER | | T 24104 | \$19.95 | | Regular |
| 6: 4-H Club | | | 8: Careers | | |
| Titles listed: 1 | | | | | |

The following is an excerpt from a Title List based on Series:

| Jackson Middle School Library | | | | | |
|-------------------------------|------------------------|----------------------|----------|----------------|-----------|
| 10/13/2003 @ 1:21pm | Title List - By Series | | | | Page 1 |
| Series | Title | Author | Price | LCCN/ISBN/ISSN | Type |
| Call Number | Category | Barcode | Category | | Circ Type |
| An Atherton controversy | | | | | |
| Capital punishment. | | McCafferty, James A. | | 74169503 | Books |
| 343 McCAFFERTY | | T 5829 | \$17.55 | | Regular |
| 343 McCAFFERTY | | T 5830 | \$17.55 | | Regular |
| Titles listed: 1 | | | | | |

The following is an excerpt from a Title List based on Standard Number:

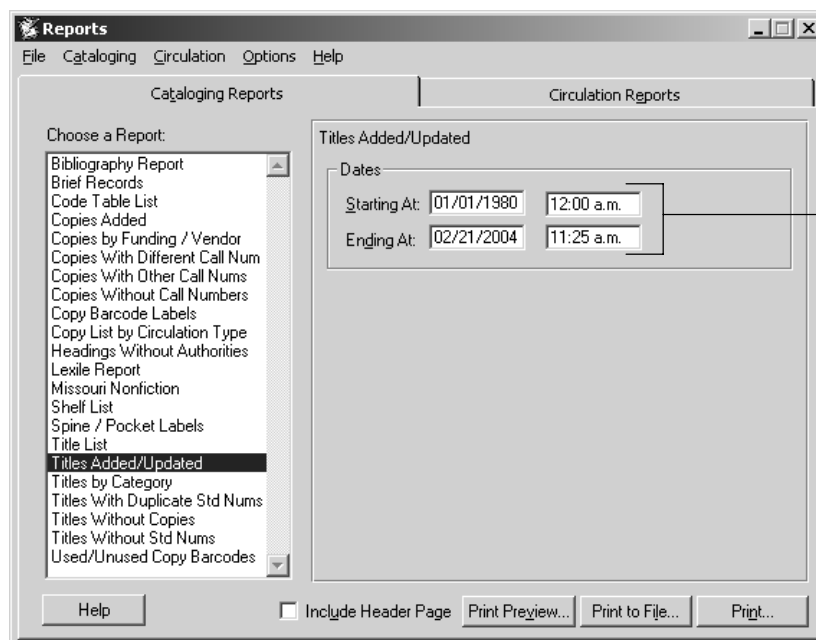
| Jackson Middle School Library | | | | |
|---|-------------------------------------|--------------------------------|----------------|-------------------------------|
| 10/13/2003 @ 1:23pm | Title List from LCCN/ISBN/ISSN List | Page 1 | | |
| ----- | | | | |
| LCCN/ISBN/ISSN | Title | Author | LCCN/ISBN/ISSN | Type |
| Call Number | Category | Barcode | Price | Circ Type |
| ----- | | | | |
| 83006566 /AC | | | | |
| Love & rivalry : three exce 920 FABER 6: 4-H Club | | Faber, Doris, 1924- T 24104 | \$19.95 | 83006566 /AC Books Regular |
| | | 8: Careers | | |
| Titles listed: 1 | | | | |

The following is an excerpt from a Title List based on Subject:

| Jackson Middle School Library | | | | |
|---|-------------------------|--------------------------------|----------------|-------------------------------|
| 10/13/2003 @ 1:21pm | Title List - By Subject | Page 1 | | |
| ----- | | | | |
| Subject | Title | Author | LCCN/ISBN/ISSN | Type |
| Call Number | Category | Barcode | Price | Circ Type |
| ----- | | | | |
| Actresses--United States--Biography--Juvenile literature. | | | | |
| Love & rivalry : three exce 920 FABER 6: 4-H Club | | Faber, Doris, 1924- T 24104 | \$19.95 | 83006566 /AC Books Regular |
| | | 8: Careers | | |
| Titles listed: 1 | | | | |

Generating a Titles Added/Updated Report

The Titles Added/Updated Report presents a list of titles that were added or updated and copies added in your collection during a selected time period. The report is a good way to generate a list of newly added items for a report on items purchased and received during a given period of time. This report is also useful in monitoring how long it takes to enter title information for time management purposes.



Type the range of time (dates and hours) for which you want to generate the report.

After selecting your report options, click Print.

See also: For a detailed explanation of the printing process, see "Printing the report" starting on page 495.

For Union Catalog Plus: This report shows a Member column if printing for all members. If limited by member, the member's name prints at the top of the page.

The following is an excerpt from a Titles Added/Updated Report:

The date and time the report was generated

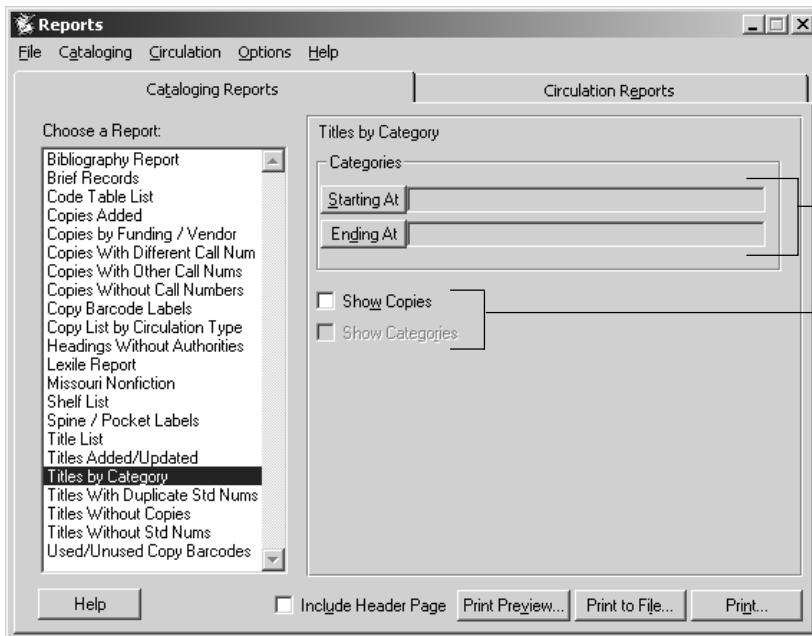
| | | | |
|-------------------------------|--------------------|--|-------|
| Jackson Middle School Library | | | |
| 10/13/2003 @ 1:24pm | | Titles Added/Updated | |
| | | Page 1 | |
| ----- | | | |
| Date | Added/Updated Time | Title | |
| | | LCCN/ISBN/ISSN | Type |
| ----- | | | |
| 10/13/2003 | | | |
| Added | 2:48PM | Cult of the Harley-Davidson : America's motorcycle 82197749 | Books |
| Copy Added | 2:48PM | Cult of the Harley-Davidson : America's motorcycle 82197749 | Books |

The date and time the titles/copies were added/updated

Generating a Titles by Category Report

Categories are groups, created on the System Setup | Setup | Cataloging | Categories tab (see page 52), used to link titles together. The Titles by Category Report lets you print lists containing all titles associated with a specific category or range of categories. By using the Titles by Category Report to construct reading lists based on the categories, you can promote neglected areas of your library's collection.

For Union Catalog Plus: This report is not available.



Select the range of categories for the report.

To include the copies that have the selected category assigned to them, check Show Copies.

To include all the categories assigned to these copies, check Show Categories.

The Titles by Category Report contains the following options:

- Select the range of categories that you want included on the report. For instructions on selecting the starting and ending categories, see page 489.

- To include copy information for each of the titles, check Show Copies.
- To include all the copy categories assigned to these copies, check Show Categories. This option isn't available unless you first select the Show Copies check box.

After selecting your report options, click Print.

See also: For a detailed explanation of the printing process, see "Printing the report" starting on page 495.

The following is an excerpt from a Titles by Category Report:

Displays the item's material type. Reports retrieves this information from the Leader tag in the MARC record (see page 268).

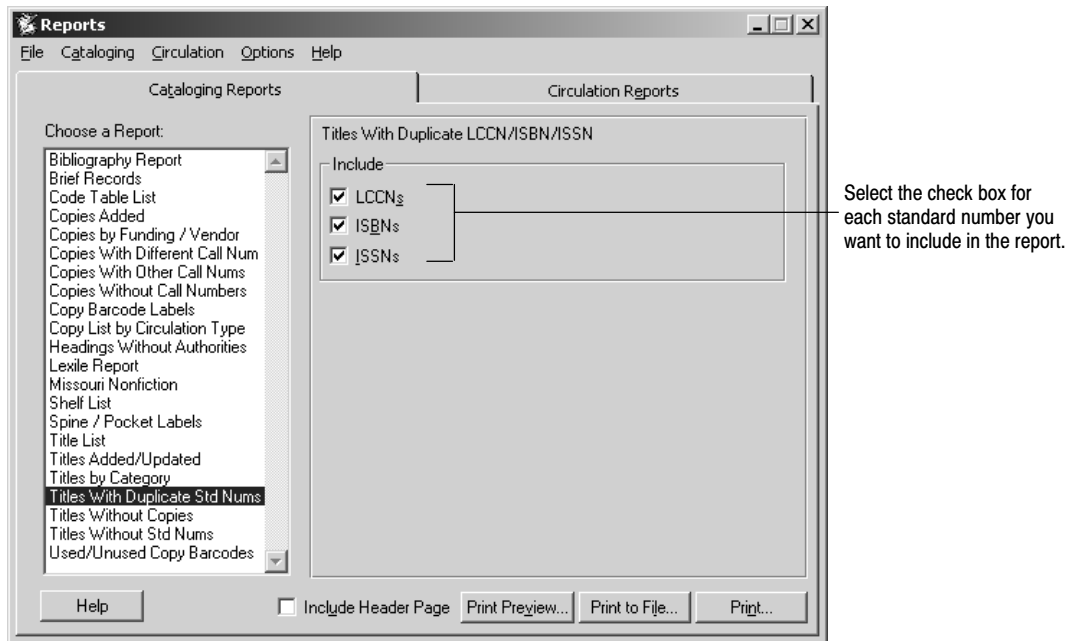
| Jackson Middle School Library | | | | | |
|-------------------------------|-------------|--------------------|---------|-------------------------|----------------------|
| 10/13/2003 @ 1:27pm | | Titles by Category | | | Page 1 |
| Category | Title | Type | Barcode | Price | Author |
| LCCN/ISBN/ISSN | Call Number | Category | Barcode | Price | Circ Type |
| ----- | | | | | |
| Family Donations | | | | | |
| Artificial intelligence | | | | | Winston, Patrick Hen |
| 83019691 | | Books | | | |
| 001.535 WIN | | | T 21051 | 19.99 | Regular |
| 2: Family Donations | | | | 11: Math and Philosophy | |

Generating a Titles With Duplicate Standard Numbers Report

The Titles With Duplicate Standard Numbers Report lets you locate duplicate records or possible cataloging mistakes or compile series lists. Run this report after adding or enhancing the records or before running an Autorecon with Alliance Plus.

If you find any duplicate standard numbers, we don't recommend you leave them in your records. The Alliance Plus Autorecon feature uses the standard numbers along with the title to compare your bibliographic records against an Alliance Plus data source. If it finds multiple records with the same standard number and title, the application may replace all the matching records with the Alliance Plus version (depending on the Autorecon option you select). If you discover duplicate titles in the library database, we recommend that you

move all the copies for that title to a single bibliographic record. This makes it easier to find all the copies for that title.



After selecting your report options, click Print.

See also: For a detailed explanation of the printing process, see "Printing the report" starting on page 495.

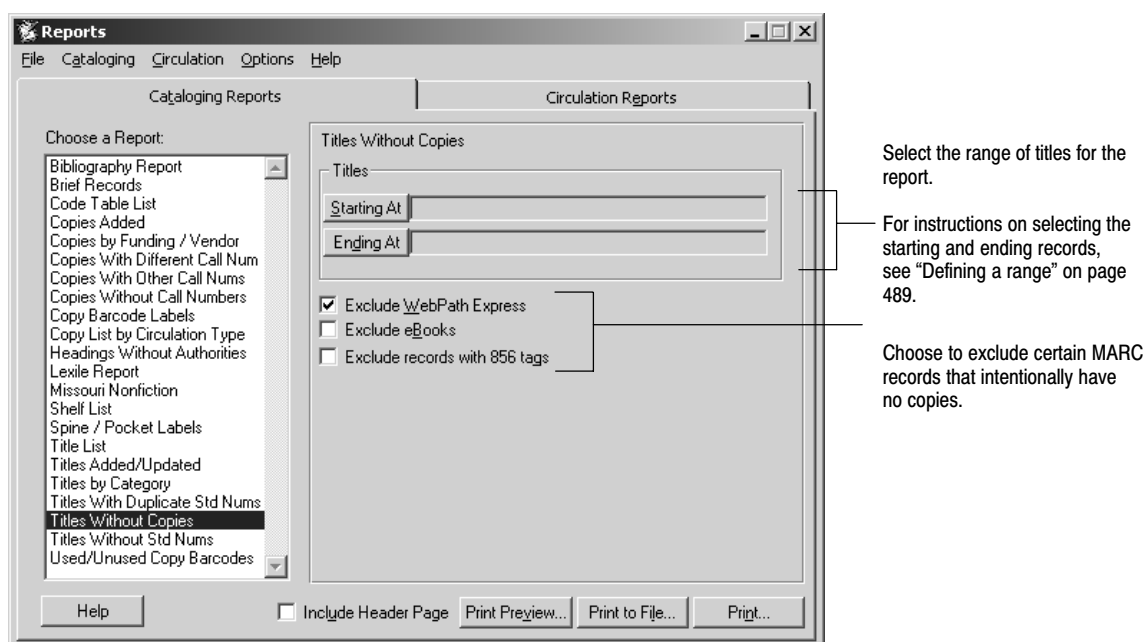
The following is from a Titles With Duplicate Standard Numbers Report:

Reports retrieves the default call numbers from the location specified in System Setup (see page 47).

| Jackson Middle School Library | |
|-------------------------------|--|
| 10/13/2003 @ 1:33pm | Duplicate Standard Numbers Page 1 |
| LCCN/ISBN/ISSN | Title |
| Def Call # | |
| 0-13-048679-5 | Artificial intelligence through Prolog |
| 005.133 | Artificial intelligence through Prolog |

Generating a Titles Without Copies Report

The Titles Without Copies Report lets you identify bibliographic records for weeding or locate incorrectly cataloged records. Run this report before updating the library database, after adding or enhancing your bibliographic records, or before running the Global Delete Titles Without Copies process.



The Titles Without Copies Report contains the following options:

- To exclude WebPath Express bibliographic records, select the first check box.
- To exclude eBook records, select the second check box. Cataloging considers any MARC record with a in position 6 of the 000 (Leader) tag and s (=electronic) in position 23 of the 008 tag to be an eBook.
- To exclude any record containing information in an 856 tag, such as a cataloged Web site or link to other electronic media, select the last check box.

After selecting your report options, click Print.

See also: For a detailed explanation of the printing process, see "Printing the report" starting on page 495.

For information on the Global Delete Titles Without Copies process, see page 335.

For Union Catalog Plus: The Member option is not available.

The Titles Without Copies Report contains the following information:

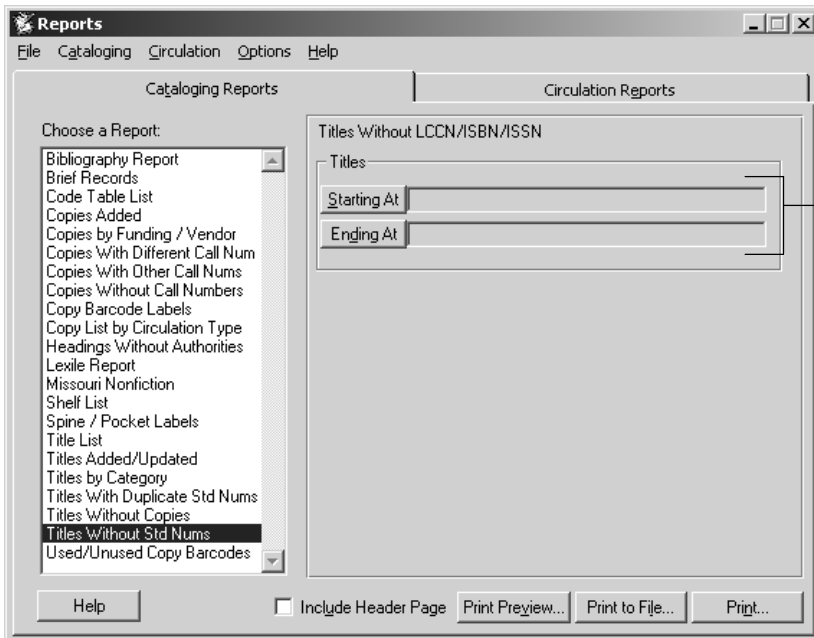
Reports retrieves the default call number from the location specified in System Setup (see page 47).

Displays the item's material type. Reports retrieves this information from the title's MARC record Leader tag (see page 268).

| | | | |
|-------------------------------|-----------------------|-------|-----------------|
| Jackson Middle School Library | | | |
| 10/13/2003 @ 1:49pm | Titles Without Copies | | Page 1 |
| ----- | | | |
| Title | | | Author |
| Def Call # | LCCN/ISBN/ISSN | Type | |
| ----- | | | |
| Baby Brontosaurus | | | Spanjian, Beth. |
| E SPA | 0-516-09565-X | Books | |

Generating a Titles Without Standard Numbers Report

The Titles Without Standard Numbers Report helps you locate bibliographic records in the library database that do not contain standard numbers. Circulation Plus and Catalog Plus use the standard numbers to compare your current bibliographic records to any imported records. Without them, you may inadvertently import duplicate titles into the library database. In addition, the Alliance Plus Autorecon feature does not process any bibliographic record without a standard number. Run this report before sending your bibliographic records out for retrospective conversion, importing records, running an Autorecon with Alliance Plus, or after adding or updating your records.



Select the range of titles for the report. For instructions on selecting the starting and ending records, see "Defining a range" on page 489.

After selecting your report options, click Print.

See also: For a detailed explanation of the printing process, see "Printing the report" starting on page 495.

The following is an excerpt from a Titles Without Standard Numbers Report:

Reports retrieves the default call number from the copy or, if there is no copy, from the location specified in System Setup (see page 47).

| Jackson Middle School Library | | |
|-------------------------------|---------------------------------|-----------------|
| 10/13/2003 @ 1:54pm | Titles Without Standard Numbers | Page 1 |
| Title | Def Call # | Author |
| Type | | |
| Dinosaur Ben | E DEC | DeCaprio, Annie |
| Books | | |

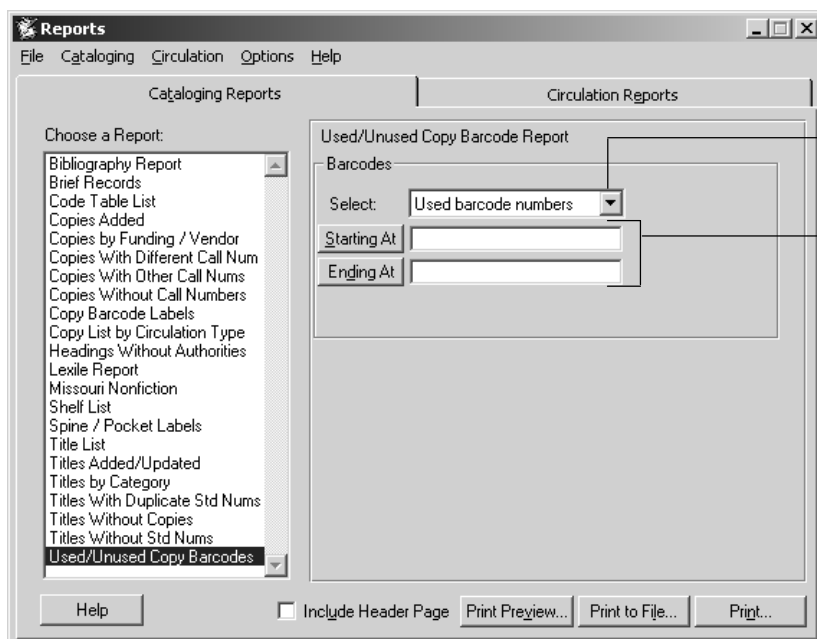
Displays the item's material type. Reports retrieves this information from the Leader tag in the title's MARC record (see page 268).

For Union Catalog Plus: If limited by member, the union catalog name and the member name print at the top of the page.

Generating a Used or Unused Copy Barcodes Report

The Used/Unused Copy Barcodes Report lets you create a list of copy barcodes currently assigned to copies in the library database or identify those copy barcodes available for reassignment. To print actual barcodes, see "Printing Copy Barcode Labels" on page 514. Give a copy of the Used or Unused Copy Barcodes Report to your staff before they enter new copies into the library database.

For Union Catalog Plus: You must select a member before generating this report. The union catalog name and the member name print at the top of each page.



Pick the type of copy barcodes you want listed in the report. The barcode range options vary with your choice.

To create a list of Used copy barcodes, enter the range of barcodes you want to use in your search. For instructions on selecting the starting and ending records, see "Defining a range" on page 489.

To create a list of Unused barcodes, enter the beginning barcode number and select the number of barcodes to include in the report.

Note: Make sure the barcodes entered in the Starting At and Ending At fields match the symbology defined for library materials in System Setup (see page 37).

After selecting your report options, click Print.

See also: For a detailed explanation of the printing process, see "Printing the report" starting on page 495.

The following are excerpts from Used/Unused Copy Barcodes Reports:

Displays the barcode symbology defined for library materials in System Setup (see page 37).

If you picked Used barcode numbers from the Select drop-down list, the report displays consecutive barcodes as a range of barcodes.

| | | |
|-------------------------------|--------------------------------|--------|
| Jackson Middle School Library | | |
| 10/13/2003 @ 1:57pm | Used/Unused Copy Barcode: Used | Page 1 |
| ----- | | |
| Barcode Number/Range | | |
| ----- | | |
| Symbology = Follett Classic | | |
| | T 2515 | |
| | T 2520 | |
| | T 2522 - T 2523 | |
| | T 2534 | |
| | T 2578 | |
| | T 2596 | |

If you picked Unused barcode numbers from the Select drop-down list, the report displays each barcode in the report on a separate line.

| | | |
|-------------------------------|---|--------|
| Jackson Middle School Library | | |
| 10/13/2003 @ 1:58pm | Used/Unused Copy Barcode: Unused Barcodes | Page 1 |
| ----- | | |
| Barcode Number/Range | | |
| ----- | | |
| Symbology = Follett Classic | | |
| | T 2500 | |
| | T 2501 | |
| | T 2502 | |
| | T 2503 | |
| | T 2504 | |
| | T 2505 | |

Chapter 38 Circulation reports

The chapter contains instructions for generating the reports displayed on the Circulation Reports tab.

Note: If haven't installed Circulation Plus, you can't access circulation reports.

Circulation reports overview

The circulation reports are designed to help with collection development and support your circulation activities. They include reports for analyzing transactions and holds, overdues and fines lists, and patron notices. The following table contains a brief description of each report, list, notice, slip, card, and barcode label on the Circulation Reports tab:

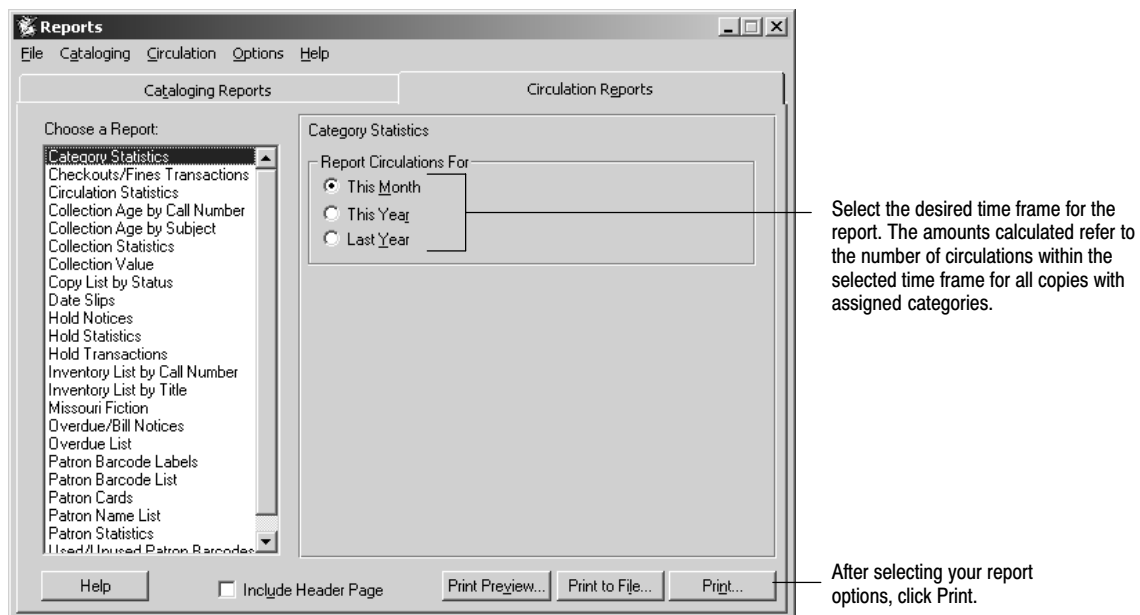
| Circulation report | Description |
|-------------------------------|--|
| Category Statistics | Presents your circulation statistics for the current month, year, or previous year, based on copies with assigned categories (see page 539). |
| Checkouts/Fines Transactions | Creates a list of patrons with overdue materials and outstanding fines or checked out items. Use this report to distribute overdue and fine information to your teachers or library staff (see page 540). |
| Circulation Statistics | Presents the circulation statistics for a selected range of titles or the shelf order of the copies within your collection. Use this report to identify areas in your collection in need of weeding or enhancement (see page 542). |
| Collection Age by Call Number | Presents your collection's average age and circulation statistics based on a range of call numbers. Use this report to identify areas in need of enhancement or weeding (see page 545). |
| Collection Age by Subject | Presents the average age and circulation statistics of your collection based on a range of subjects. Use this report to identify areas in need of enhancement or weeding (see page 547). |
| Collection Statistics | Presents your collection's circulation statistics for a day, a month, or a previous year along with the statistics for the current year. This report also includes the total statistics collected since you installed Circulation Plus. Use this report to identify areas in need of promotion or weeding and to address school district or state reporting requirements (see page 548). |
| Collection Value | Presents your collection's value as a whole and by call number range. This report is ideal for providing information to your insurance company and can also be used to support a budget (see page 550). |

| Circulation report | Description |
|--------------------------------------|--|
| Copy List by Status | Presents the copies in your collection based on each item's copy status. Use this report to identify your copies based on any copy status (Available, Checked Out, On Loan, At The Bindery, Missing, On Hold, or Lost) (see page 551). |
| Date Slips | Prepares date due slips for your patrons. Choose a date or sort by loan periods set up for each patron type (see page 552). |
| Hold Notices | Prepares notices to inform your patrons that copies are ready to be picked up. Generate these notices in batches for mailing or internal distribution (see page 553). |
| Hold Statistics | Lets you examine the frequency in which your patrons are placing holds and reserves on copies. Use this report to identify areas of demand (see page 556). |
| Hold Transactions | Presents the patron, title information, and status of each hold and reserve. Use this list to post hold information for your library staff or generate pick lists (see page 557). |
| Inventory List by Call Number | Lists copies based on inventory status and call numbers. Use this list to compare the missing items recorded in the database to the copies on the shelves (see page 558). |
| Inventory List by Title | Lists copies based on inventory status and titles. Use this list to compare the missing items recorded in the database to the copies on the shelves (see page 559). |
| Overdue/Bill Notices | Prepares notices to inform your patrons of overdue materials or outstanding fines. Generate these notices in batches for mailing or internal distribution (see page 561). |
| Overdue List | Creates a simple list of patrons with overdue materials (see page 566). |
| Patron Barcode Labels | Produces new or replacement patron barcodes in Follett Classic, Code 39, or Codabar symbologies (see page 567). |
| Patron Barcode List | Produces a list of patrons and their barcodes. Use this report to create a list of scannable patron barcodes (see page 570). |
| Patron Cards | Prepares patron library cards on rotary or ID card stock. Use these to circulate materials and identify patrons (see page 572). |
| Patron Name List | Creates a customized list of patron records. Run this report before conducting remote circulations with a PHD or to generate class and attendance lists (see page 575). |

| Circulation report | Description |
|-----------------------------|---|
| Patron Statistics | Presents your circulation statistics in summary or detailed form by Patron Type, Location, and user-defined fields. This report also includes the circulation statistics collected since you installed Circulation Plus. Use this report to monitor changes in transaction activity resulting from new reading programs or motivational presentations (see page 577). |
| Used/Unused Patron Barcodes | Lists available or used patron barcode numbers. Run the report before you add new patrons (see page 579). |

Generating a Category Statistics Report

Categories are groups, created on the System Setup | Setup | Cataloging | Categories tab (see page 52), used to link titles together for curriculum or statistical purposes. The Category Statistics Report lets you print the circulation statistics for all copies with categories currently in your database. Using the Category Statistics Report to check the circulation of copies with assigned categories is one way you can discover the neglected areas of your collection.



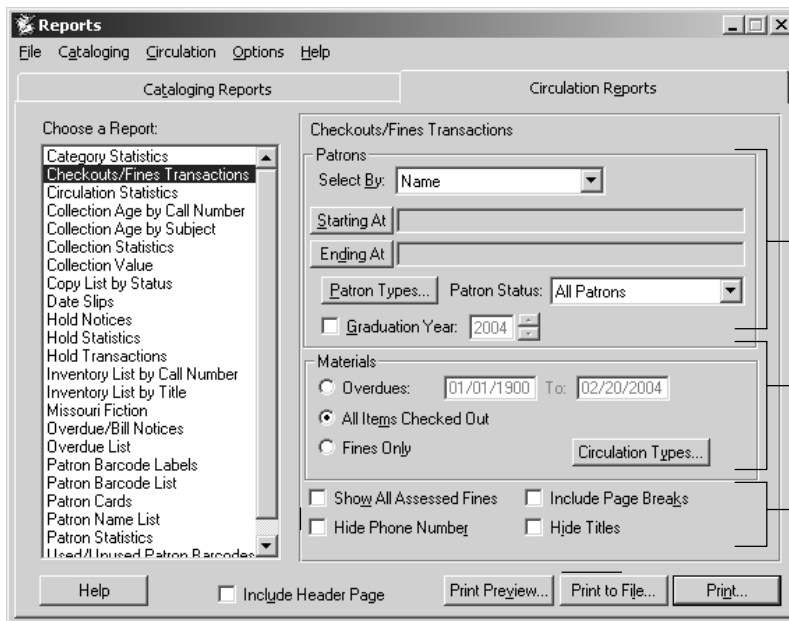
See also: For an explanation of the printing process, see page 495.

The following is an excerpt from a Category Statistics Report generated for this month's circulations:

| Jackson School Library | | | |
|------------------------|---------------------|-------------|---------------|
| 10/3/2003 @ 1:29pm | Category Statistics | Page 1 | |
| CODE | DESCRIPTION | Total Circs | Monthly Circs |
| 5 | Art | 13 (15.1%) | 13 (61.9%) |
| 6 | Careers | 0 (0.0%) | 0 (0.0%) |
| 7 | Geography | 0 (0.0%) | 0 (0.0%) |
| 4 | History | 5 (5.8%) | 5 (23.8%) |
| 3 | Native American stu | 5 (5.8%) | 5 (23.8%) |
| 8 | New Fiction | 0 (0.0%) | 0 (0.0%) |
| 2 | Summer Reading | 1 (1.1%) | 1 (4.7%) |
| 1 | Temporary | 1 (1.1%) | 0 (0.0%) |
| | | 25 | 24 |
| | | | 35 |

Generating a Checkouts/Fines Transactions Report

The Checkouts/Fines Transactions Report provides you with a list of patrons with overdue copies and outstanding fines, patrons with any checked-out items, or only patrons with outstanding fines. This report is ideal if you want to distribute the overdue and fine information to your teachers and library staff. If your library uses a PHD to conduct remote circulation, provide a copy of this report to your staff members before they begin conducting transactions.



Select the patrons whose transactions you want to print.

Select the materials for the report.

Select the check boxes for any of the report options.

The Checkouts/Fines Transactions Report has these options:

- **Patrons:** Select the method for searching the library database. Then select the range of patrons for the report. For instructions on selecting the starting and ending records, see page 489.

Note: Location and User Fields are customizable patron record prompts. For additional information on changing these prompts, see page 72.

To limit the report to patrons belonging to specific patron types, click Patron Types (see page 493).

To limit the report to patrons having a specific patron status, select the status from the Patron Status drop-down.

To limit the report to patrons in a specific grade, select the Graduation Year check box, and enter the desired year.

- **Materials:**

Overdues: Limits the materials in the report to overdue items due during a specific range of dates. Select this check box and enter the desired dates.

Note: Regardless of the date range you enter, this option will not include items not currently overdue. To include items that are not yet overdue, you'll need to run the report as of a future date. For information on changing the report date, see page 494.

All Items Checked Out: Lists all patrons with current checkouts.

Fines Only: Limits the report to patrons with assessed fines (overdue, lost, damaged, and user-defined).

To limit the report to a specific circulation type, click Circulation Types (see page 493).

- **Show All Assessed Fines:** Whether you select Overdues or Checkouts (above), checking this box adds any outstanding assessed fines for overdue, damaged or lost items, user-defined fines, and refunds.

To include pending fines for any overdue items, select the Calculate Overdue Fines check box on the System Setup | Setup | Circulation | Fines tab.

- **Include Page Breaks:** Starts a new page after each entry in the report. Entries are determined by the criterion you identified in the Select By list.
- **Hide Phone Number and Hide Titles:** Excludes these items from the report.

After selecting your report options, click Print.

See also: For an explanation of the printing process, see page 495.

The following are excerpts from Checkouts/Fines Transactions Reports:

In this first example, the user decided to select the Fines Only option. As a result, assessed fines for items already checked in, lost, or damaged, or user-defined, are included in the report (see Chapter 11, "Dealing with fines and lost copies").

Displays the date you created the fine.

| Jackson School Library | | | | | | |
|-------------------------------|------------|------------------------------|-----------|-----------|--------|--|
| 10/27/2003 @ 11:47am | | Checkouts/Fines Transactions | | | Page 1 | |
| Patron Name | Barcode/ID | Phone | Number | Barcode | | |
| Title | Due Date | Price | Fine Date | Fine | | |
| Call Number | Fine Type | | | | | |
| Box, Chris | P 115 | | | | | |
| Jim Smiley & his jumping frog | 1/20/2003 | \$15.95 | 3/2/2003 | T 4300507 | | |
| PS1322.C4 1940 | | | | \$9.50 | | |
| The legacy of Al Capone | 1/20/2003 | \$17.99 | 3/2/2003 | T 4300522 | | |
| HV6248.C17 | | | | \$9.50 | | |
| Total Assessed Fines: \$19.00 | | | | | | |

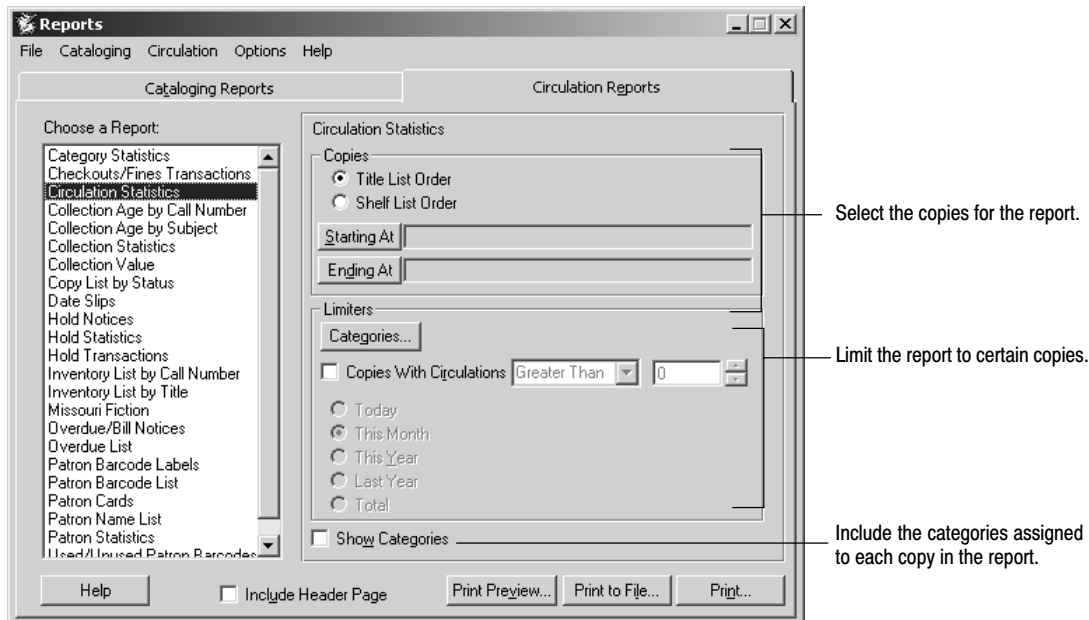
In this example, the user selected All Items Checked out and did not select the Show All Assessed Fines option. As a result, the Fines column is limited to the current pending fines for overdue copies. These fine amounts are calculated as of the report date. The fine is not actually assessed until the item is checked in.

| Jackson School Library | | | | | | |
|--|------------|------------------------------|-----------|-----------|--------|--|
| 10/27/2003 @ 11:47am | | Checkouts/Fines Transactions | | | Page 1 | |
| Patron Name | Barcode/ID | Phone | Number | Barcode | | |
| Title | Due Date | Price | Fine Date | Fine | | |
| Call Number | Fine Type | | | | | |
| Box, Chris | P 115 | | | | | |
| Above the battle : war making in America | 10/02/2003 | \$13.95 | | T 4300355 | | |
| E181.L5 | | | | \$2.50 | | |
| Abraham Lincoln and the American political | 11/12/2003 | \$21.95 | | T 4300807 | | |
| 457.8 | | | | | | |
| Total Pending Fines: \$2.50 | | | | | | |
| Note: Pending fines are calculated as of the report date, and reflect fines that may be charged if the overdue items were returned on this date. | | | | | | |

Generating a Circulation Statistics Report

The Circulation Statistics Report lets you choose to examine itemized circulation statistics for a selected range of titles or call numbers. You can use this report to examine the circulation statistics for a specific category. If you choose Shelf List order, use the report to identify areas in your library collection in need of weeding or enhancement.

Note: If you want to calculate circulation statistics as of a particular date, use the Set Report Date feature to override the current system date. For more information about changing the report date, see page 494.



The Circulation Statistics Report has these options:

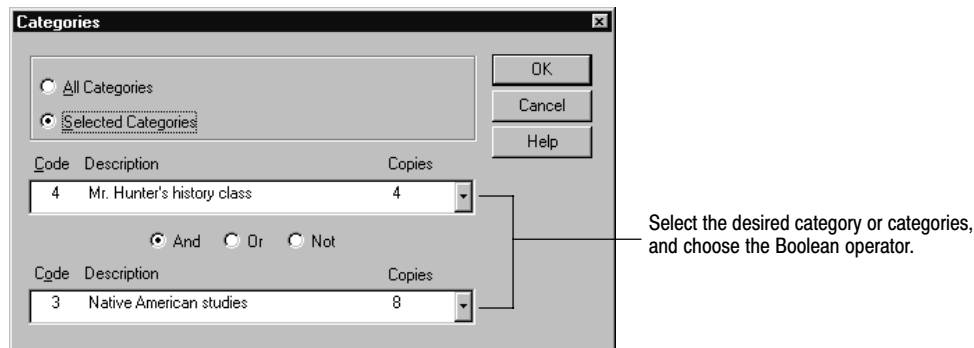
- **Copies:** Select the method for sorting the statistics in the report. Title List Order allows you to select a range of titles and prints in title order. Shelf List Order allows you to select a range of call numbers and prints in call number order.

Note: If you select Shelf List Order, any copies without call numbers are not included in the report.

Select the range of copies for the report. For instructions on selecting the starting and ending records, see page 489.

- **Limiters:** To limit the report to copies that circulated a certain number of times, select the Copies with Circulations check box, choose either Greater Than or Less Than, and enter the number of circulations required for the copy to appear in the report. Then identify the time frame to which the numbers apply.

You can also limit the categories in the report by clicking Categories. From the Categories dialog, select the category limiters you want:



Select a category from one or both lists. These lists display all the categories created in System Setup and the number of copies assigned to each.

If you select two categories, use a Boolean operator to define the relationship between them:

- **And:** Limits the report to only those titles belonging to both categories.
- **Or:** Includes those titles that belong to either category.
- **Not:** Limits the report to those titles in the upper category that are not also in the lower category.

Note: Categories are groups, created on the System Setup | Setup | Cataloging | Categories tab (see page 52), used to link titles for curriculum or statistical purposes.

- **Show Categories:** Lists all the categories assigned to each copy in the report.

After selecting your report options, click Print.

See also: For an explanation of the printing process, see page 495.

These abbreviations are used in the reports:

TDY — Circulations today

MTH — Circulations this month

YTD — Circulations this year to date

LYR — Circulations last year

TOTAL — Circulations since you installed Circulation Plus

The following is an excerpt from a Circulation Statistics Report in Title List Order:

| Jackson School Library | | | | | | | | | |
|------------------------|-------------|---|-----|-----|---------|--------|-----|---------------------|-------|
| 10/3/2003 @ 3:38pm | | Circulation Statistics - Title List Order | | | | | | Page 1 | |
| Title | | Type | | | | Author | | | |
| LCCN/ISBN/ISSN | Call Number | Circ Type | TDY | MTH | Barcode | YTD | LYR | Price | TOTAL |
| Dirt bikes | | | | | | | | | |
| 94022827 /AS | | | | | Books | | | Young, Jesse, 1941- | |
| 629.227 You | | | | | T 2345 | 12 | 0 | \$2.50 | 12 |
| Regular | | 1 | | 2 | | | | | |
| 629.227 You | | | | | T 2346 | | | \$2.50 | |
| Regular | | 0 | | 1 | | 2 | 0 | | 2 |

Titles listed: 1

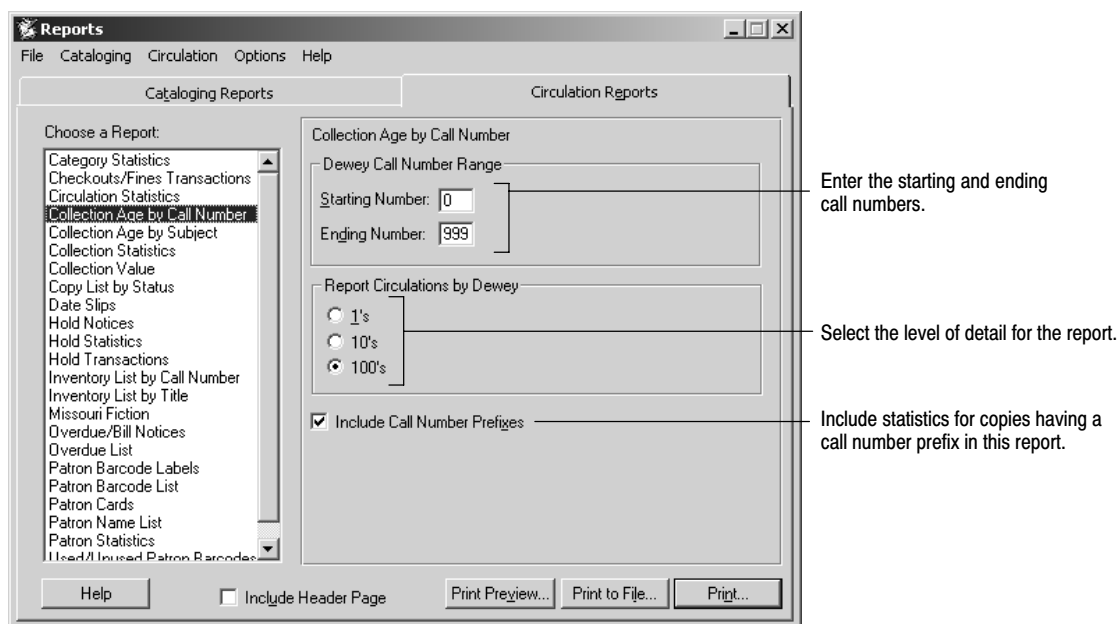
The following Circulation Statistics Report excerpt is in Shelf List Order:

| Jackson School Library | | | | | | |
|------------------------|---|-----|--------|-----|--------|--|
| 10/3/2003 @ 1:43PM | Circulation Statistics - Shelf List Order | | | | Page 1 | |
| Call Number | Barcode | | | | | |
| Title | TDY | MTH | YTD | LYR | TOTAL | |
| Price | | | | | | |
| 473.21 Will | | | T 7748 | | | |
| Latin dictionary | | | | | | |
| \$12.00 | 1 | 1 | 1 | 1 | 3 | |

Generating a Collection Age by Call Number Report

The Collection Age by Call Number Report lets you examine your collection's age and circulation statistics based on a range of call numbers. By reviewing this report, you can see which areas in your collection need weeding or enhancement.

Note: If you want to calculate circulation statistics as of a particular date, use the Set Report Date feature to override the current system date. For more information about changing the report date, see page 494.



The Collection Age by Call Number Report has these options:

- **Call Number Range:** Type in the starting and ending numbers for this report.
- **Detail level:** Select the level of detail for the report:
 - 1's—Lists statistics for each whole call number.

10's—Lists statistics for each group of 10 (000-009, 010-019, and so on).

100's—Lists statistics for each group of 100 (000-099, 100-199, and so on).

- **Call Number Prefixes:** Check the box to include statistics for copies that have call number prefixes (for example, FIC or REF). If you do not, the report is limited to copies with Dewey call numbers (your non-fiction materials).

See also: Page 48, for information on updating your list of call number prefixes.

After selecting your report options, click Print.

See also: For an explanation of the printing process, see page 495.

The following is an excerpt from a Collection Age by Call Number Report:

Lists the number of copies in the call number range or prefix and the percentage of the library collection represented by these copies.

Lists the number of circulations attributed to copies in the call number range or prefix since Circulation Plus was installed and the corresponding percentage of total circulations.

| | | | | |
|------------------------|----------|-------------------------------|--------------|-------------|
| Jackson School Library | | | | |
| 10/3/2003 @ 3:46pm | | Collection Age By Call Number | | Page 1 |
| Dewey | Avg. Age | Collection | Yearly Circs | Total Circs |
| 001-099 | 1988 | 21 (17.3%) | 3 (21.4%) | 3 (21.4%) |

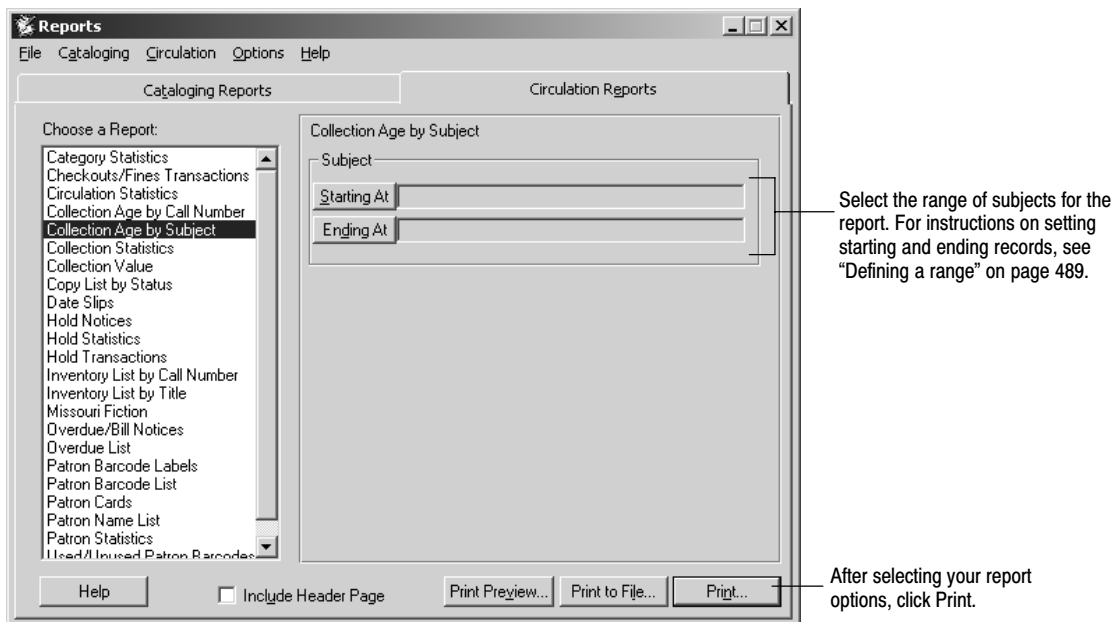
Displays the average age of all the titles in the call number range or prefix. This age is calculated from the publication dates in the 008 or 260 tag of the MARC records (see page 272).

Lists the number of this year's circulations attributed to copies in the call number range or prefix and the corresponding percentage of the current year's circulations.

Note: The Collection Age by Call Number Report totals the circulation statistics for each column and displays the results on the last line. However, if the report doesn't include copies with call number prefixes, or if you've deleted copies from the collection, the totals may not match the sum of the figures in each column.

Generating a Collection Age by Subject Report

The Collection Age by Subject Report lets you examine your collection's age and circulation statistics based on a range of subjects. By reviewing this report, you can see which areas in your collection need weeding or enhancement.



Note: If you want to calculate circulation statistics as of a particular date, use the Set Report Date feature to override the current system date. For more information about changing the report date, see page 494.

See also: For an explanation of the printing process, see page 495.

The following is an excerpt from a Collection Age by Subject Report:

Lists the number of copies associated with the subject and the percentage of the library collection represented by these copies.

Lists the number of circulations attributed to copies associated with the subject since Circulation Plus was installed and their corresponding percentage of total circulations.

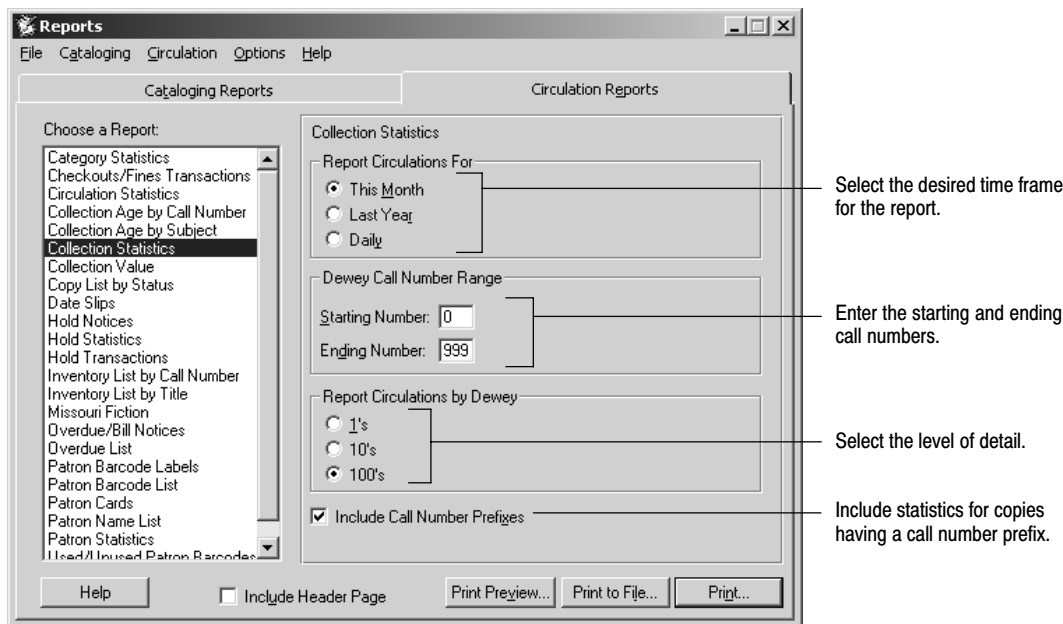
| Subject | | Collection | Yearly Circs | Total Circs |
|----------------------------------|--|------------|--------------|-------------|
| Artificial intelligence. 1997 | | 29 (23.9%) | 4 (50.0%) | 4 (50.0%) |

Displays the average age of all the titles associated with the subject. This age is calculated from the publication dates in the 008 or 260 tag of the MARC records (see page 272).

Lists the number of this year's circulations attributed to copies associated with the subject and their corresponding percentage of the current year's circulations.

Generating a Collection Statistics Report

The Collection Statistics Report lets you examine the circulation statistics for the current day, month, or the previous year. This report also includes the statistics for the current year as well as the statistics accumulated since you installed Circulation Plus. Use this report to identify low circulation areas in the library collection in need of weeding, promotion, or enhancement. You can also use this report to track library materials currently being promoted.



The Collection Statistics Report has these options:

- **Time frame:** Choose the time span for the statistics.
- **Call Number Range:** Type in the starting and ending numbers for this report.
- **Detail level:** Select the level of detail for the report:
 - 1's—Lists statistics for each whole call number.
 - 10's—Lists statistics for each group of 10 (000–009, 010–019, and so on).
 - 100's—Lists statistics for each group of 100 (000–099, 100–199, and so on).
- **Call Number Prefixes:** Check the box to include statistics for copies that have call number prefixes (for example, FIC or REF). If you do not, the report is limited to copies with Dewey call numbers (your non-fiction materials).

After selecting your report options, click Print.

Note: If you want to calculate circulation statistics as of a particular date, use the Set Report Date feature to override the current system date. For more information about changing the report date, see page 494.

See also: Page 48, for information on updating your list of call number prefixes. For an explanation of the printing process, see page 495.

The following are excerpts from the Collection Statistics Report for monthly statistics, statistics from the previous year, and daily statistics:

Lists the number of this year's circulations attributed to copies in the call number range or prefix and the percentage of the current year's circulations represented by these figures.

Lists the number of copies in the specific call number range or prefix and the corresponding percentage of the library collection.

| Jackson School Library | | | | |
|------------------------|-------------|-----------------------|---------------|------------|
| 10/3/2003 @ 3:52pm | | Collection Statistics | | Page 1 |
| Range | Total Circs | Yearly Circs | Monthly Circs | Collection |
| 001-099 | 3 (21.4%) | 3 (21.4%) | 3 (21.4%) | 21 (17.3%) |

Lists the number of circulations attributed to copies in the call number range or prefix since Circulation Plus was installed and the corresponding percentage of total circulations.

Lists the number of this month's circulations attributed to copies in the call number range or prefix and the corresponding percentage of this month's total circulations.

| Jackson School Library | | | | |
|------------------------|-------------|-----------------------|-----------|------------|
| 10/3/2003 @ 3:55pm | | Collection Statistics | | Page 1 |
| Range | Total Circs | Yearly Circs | Last Year | Collection |
| 001-099 | 3 (21.4%) | 3 (21.4%) | 0 (0.0%) | 21 (17.3%) |

Lists the number of the previous year's circulations attributed to copies in the call number range or prefix and the corresponding percentage of last year's total circulations.

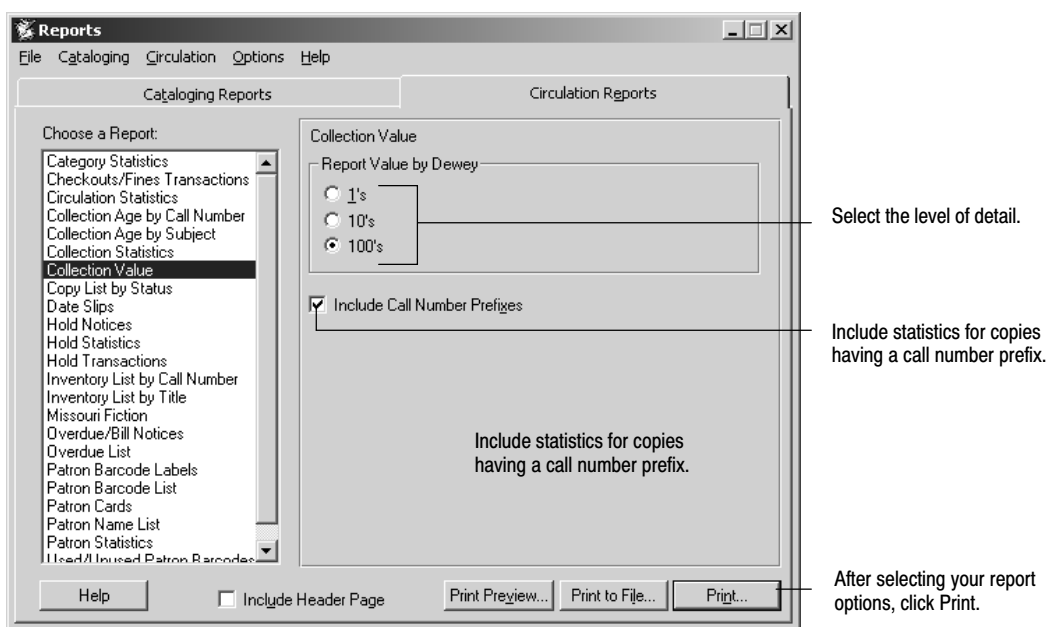
| Jackson School Library | | | | |
|------------------------|-------------|-----------------------|-------------|------------|
| 10/3/2003 @ 3:58pm | | Collection Statistics | | Page 1 |
| Range | Total Circs | Yearly Circs | Daily Circs | Collection |
| 001-099 | 3 (21.4%) | 3 (21.4%) | 0 (0.0%) | 21 (17.3%) |

Lists the number of today's circulations attributed to copies in the call number range or prefix and the corresponding percentage of today's total circulations.

Note: The Collection Statistics Report totals the circulation statistics for each column and displays the results on the last line. However, if the report doesn't include copies with call number prefixes, or if you have weeded any copies with Dewey call numbers from the collection, the circulation statistics may be less than the totals on the last line of the report.

Generating a Collection Value Report

The Collection Value Report lets you examine your collection's value as a whole and by call number range. Reports calculates these values using the prices in copy records. Since some copy records may not contain a price, Reports also provides you with an estimated value. The estimated value is based on an average of the prices in that call number range. This report is ideal for providing information to your insurance company and can also be used to justify a budget. For example, if your collection needs more science books, you can calculate the average cost per science title based on the information in that Dewey range.



The Collection Value Report has these options:

- **Detail level:** Select the level of detail for the report:
 - 1's—Lists statistics for each whole call number.
 - 10's—Lists statistics for each group of 10 (000–009, 010–019, and so on).
 - 100's—Lists statistics for each group of 100 (000–099, 100–199, and so on).
- **Call Number Prefixes:** Check the box to include statistics for copies that have call number prefixes (for example, FIC or REF). If you do not, the report is limited to copies with Dewey call numbers (your non-fiction materials).

After selecting your report options, click Print.

Note: If you want to calculate the collection value as of a particular date, use the Set Report Date feature to override the current system date. For more information about changing the report date, see page 494.

See also: Page 48, for information on updating your list of call number prefixes. For an explanation of the printing process, see page 495.

The following is an excerpt from a Collection Value Report:

Lists the number of copies with prices in the call number range or prefix and the percentage of the range or prefix they represent.

Lists the estimated value of the call number range or prefix. The estimated value is based on an average of the values of copies that have prices.

| 10/3/2003 @ 3:59pm | | Jackson School Library | | Page 1 | |
|--------------------|------------|------------------------|------------------|-----------------|--|
| | | Collection Value | | | |
| Range | Collection | With Prices | Calculated Value | Estimated Value | |
| 001-099 | 23 (1.5%) | 19 (82.6%) | \$336.32 | \$407.12 | |
| 100-199 | 11 (0.7%) | 7 (63.6%) | \$112.53 | \$176.81 | |

Lists the number of copies in the specific call number range or prefix and the corresponding percentage of the collection.

Lists the value of the copies that have prices in the call number range or prefix.

Generating a Copy List by Status

The Copy List by Status lets you examine a selected portion of your collection based on a specific copy status. You can use this list as a reference tool while conducting collection development activities. For example, create a list based on missing or lost copies when ordering new books for your collection. You can use this list for review before running the Global Delete Lost Copies or Global Delete Missing Copies.

Select the range of titles for the list. For instructions on selecting starting and ending records, see "Defining a range" on page 489.

Identify the copy status used to limit the copies in the report.

To list the categories assigned to each copy, select the check box.

After selecting your report options, click Print.

Note: Categories are groups, created in System Setup | Setup | Cataloging | Categories (see page 52), used to link titles together for curriculum or statistical purposes.

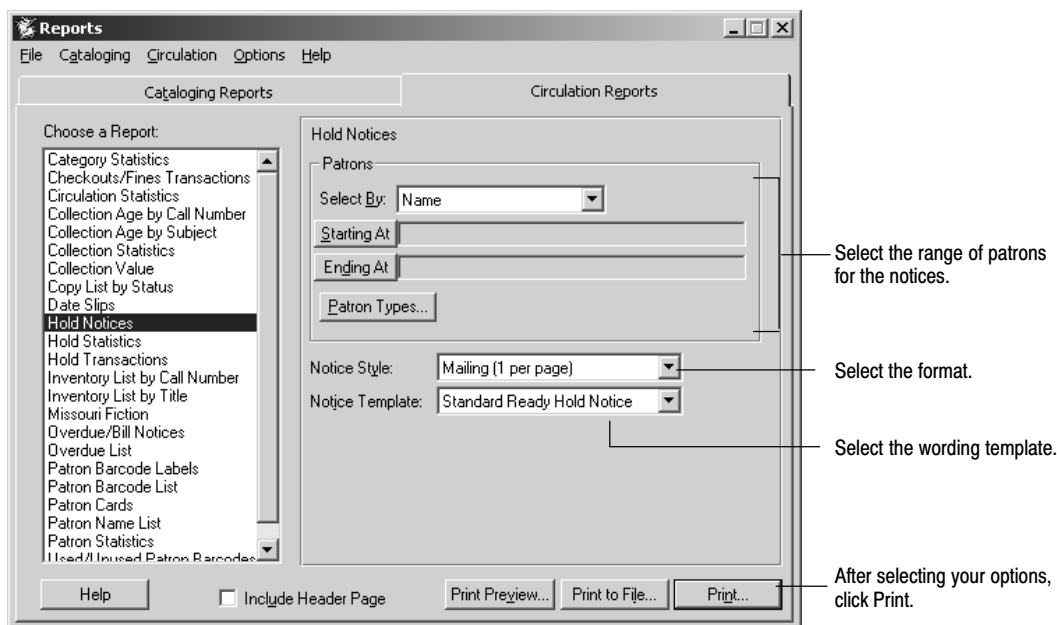
See also: For an explanation of the printing process, see page 495.

Generating Hold Notices

Use Hold Notices to notify your patrons when copies are ready for pickup.

Notices print for both ready holds and ready reserves. When a copy that satisfies a hold is checked in, Circulation Desk changes the hold status on the copy from Pending to Ready. When a pre-reserve processing date arrives, the hold status of the reserve becomes Ready if the copy is available (Pending if it is not). When a hold status changes to Ready, Circulation Desk flags the hold for notice printing.

Reports generates a specific hold notice only once. If you need another copy of a notice, you can reprint it if it was generated earlier that day. If you need another copy on a later date, use Options | Set Report Date (from the menu) to print the notice as of the original date. For more information about changing the report date, see page 494.



The Hold Notices have these options:

- **Patrons:** Select the method for searching the library database. Then select the range of patrons for the report. For instructions on selecting the starting and ending records, see page 489.

Note: Location and User Fields are customizable patron record prompts. For additional information on changing these prompts, see page 72.

To limit the report to patrons belonging to specific patron types, click Patron Types (see page 493).

- **Format:** Choose the internal or the mailing format. Using the internal distribution style, two notices print on a single page. If you use the mailing style, each notice requires a whole page.
- **Template:** Circulation Plus comes with a system-supplied template: the Standard Ready Hold Notice. You can duplicate and customize the wording

in it or create a new template in System Setup | Setup | Circulation | Notices. For more information, see page 82.

After selecting your report options, click Print.

The following is a sample Hold Notice in the internal distribution style:

Reports uses the salutation you defined for the patron's assigned patron type (see page 71).

| Jackson School Library | | |
|--|-------------|---|
| 10/3/2003 @ 4:00pm | Hold Notice | Page 1 |
| | | Barcode: P6117 ID: 3856117 Homerom: 432 Teacher: Mrs. Brown Graduation Year: 2006 |
| Dear Richard Grayson: The items you requested are now available in the library. Please bring this notice to the library as soon as possible. | | |
| Title | Call Number | Barcode |
| ----- | | |
| Bats and other nocturnal creatures | 428.1 | T 21104 |
| | | Expires 10/15/2003 |

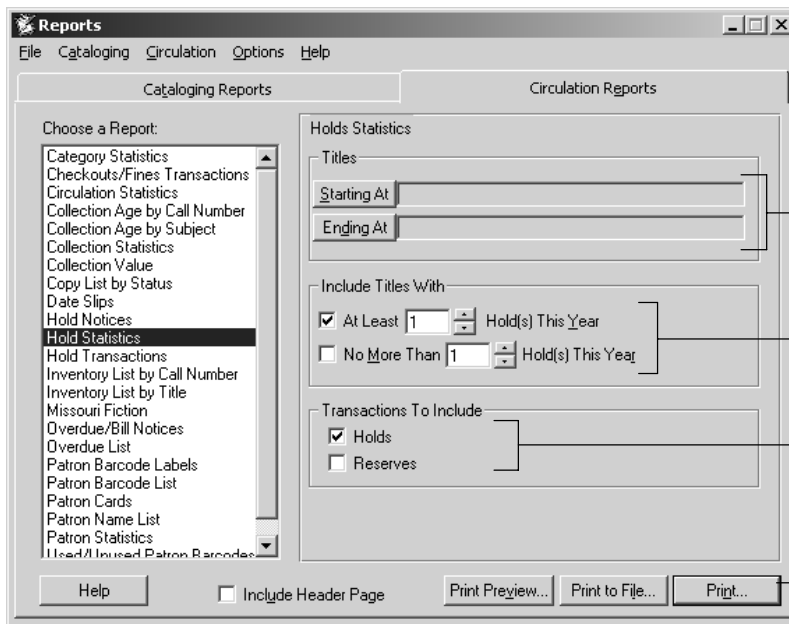
The following Hold Notice was created using the mailing distribution style:

| | | |
|--|-----------------------|-----------------|
| Jackson School Library | | |
| 10/3/2003 @ 4:00pm | Hold Notice | Page 1 |
| ----- | | |
| Dear Richard Grayson: | Graduation Year: 2006 | |
| <p>The items you requested are now available in the library. Please bring this notice to the library as soon as possible.</p> | | |
| Title | | |
| Call Number | Barcode | Expires |
| ----- | | |
| Bats and other nocturnal creatures | | |
| 428.1 | T 21104 | 10/15/2003 |
| Let's go to a circus | | |
| 791.3 | T 8043 | 10/15/2003 |
| Tales of the Dark Knight | | |
| 741.5 | T 35642 | 10/15/2003 |
| <p>Jackson School Library 1391 Schoolhouse Road McHenry, IL 60050</p> | | |
| <p>Richard Grayson 789 Homestead Ave. McHenry, IL. 60050</p> | | Barcode: P 8083 |

Generating a Hold Statistics Report

The Hold Statistics Report lets you examine the number of holds and reserves that were placed on selected titles. This report is useful for identifying materials in high demand by your patrons or for collection development purposes.

Note: If you want to calculate hold or reserve statistics as of a particular date, use the Set Report Date feature to override the current system date. For more information about changing the report date, see page 494.



Select the range of titles for the report. For instructions on selecting the starting and ending records, see "Defining a range" on page 489.

To limit the report to those titles placed on hold or reserved a minimum or maximum number of times, select the checkbox(es) and enter the desired number.

Choose to include holds, reserves, or both.

After selecting your report options, click Print.

See also: For an explanation of the printing process, see page 495.

The following is an excerpt from a Hold Statistics Report:

Displays the number of holds and/or reserves placed on the title this year.

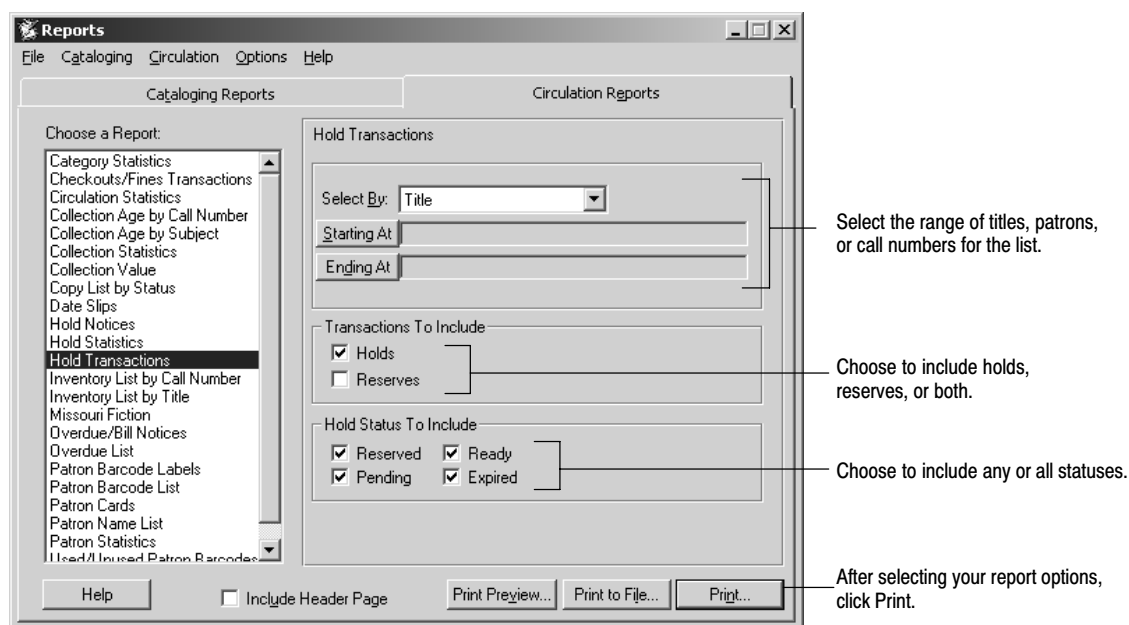
Displays the total number of copies for this title in the library collection.

| Jackson School Library | | | | | | |
|-----------------------------------|--|-----|-----------------|--------|----------------|-------|
| 10/3/2003 @ 4:11pm | | | Hold Statistics | | Page 1 | |
| Title | | YTD | LYR | Copies | LCCN/ISBN/ISSN | Type |
| Author | | | | | | |
| Anatomy, descriptive and surgical | | 4 | 9 | 1 | 76052804 | Books |
| Gray, Henry, 1825-1861 | | | | | | |

Displays the number of holds and/or reserves placed on the title last year.

Generating a Hold Transactions Report

The Hold Transactions Report lets you examine the patron, title and copy, and status of each hold and reserve in the library database. This report is ideal if you post the hold information for your library staff. Sorted by call number, it functions as a pick list for retrieving reserves or checking the hold shelf.



The Hold Transactions Report has these options:

- Select the method for searching the library database. Then select the range of titles, patrons, or call numbers for the notices. For instructions on selecting the starting and ending records, see page 489.
- Transactions: Choose to include holds, reserves, or both.
- Status: Choose to include any or all statuses:

Ready: A hold or reserve on an item that is ready to be picked up

Pending: A hold or reserve on an item that is currently checked out

Expired: A hold or reserve with an expiration date that has passed

Reserved: A reserve before its pre-reserve processing date

Note: If you select by call number and limit to pending holds, the report does not include pending any-copy holds. These holds, as yet, have no call number.

The following is an excerpt from a Hold Transactions Report in call number order:

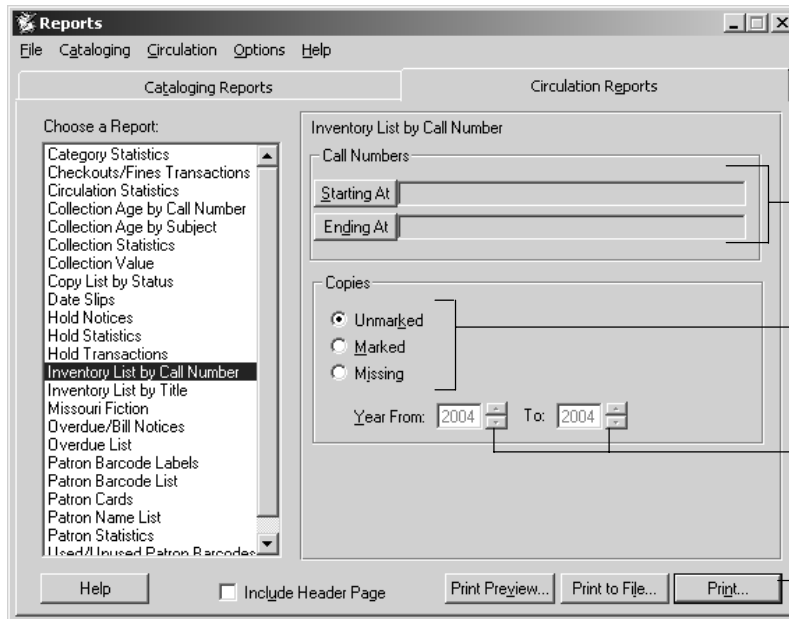
| Jackson School Library | | | | | | |
|------------------------|-----------------------------------|---------------------------------------|------------|--|----------|--|
| 10/3/2003 @ 4:13pm | | Holds By Call Number Transaction List | | | Page 1 | |
| Call Number | Title | Author | | | | |
| Barcode | Status | Reserve Period | Expires | | | |
| Patron Name | Patron Barcode | Notified | | | | |
| 611 Gra | Anatomy, descriptive and surgical | Gray, Henry, 1825-1861 | | | | |
| T 48723 | Ready | 10/15/2003 | | | | |
| Majors, Brad | | P 5722 | | | 10/03/03 | |
| 391 Coo | Costumes and clothes | Cooke, Jean, 1927- | | | | |
| T 95884 | Reserved | 12/02/2003-12/16/2003 | 12/17/2003 | | | |
| Weiss, Janet | | P 7216 | | | | |

Displays the date you printed the hold notice for this hold. (See page 553.)

Displays the date the hold or reserve expires. To change this date, see page 169.

Generating an Inventory List by Call Number

The Inventory List by Call Number lets you examine copies based on a specific inventory status. This list is ideal if you want to compare the missing copies recorded in the library database to the copies on the library shelves. We suggest you run this list for unmarked copies before finalizing the inventory, and run it for missing copies after it's finalized. Run it, also, before performing a Global Delete Missing Copies.



Select the range of call numbers for the list. For instructions on selecting the starting and ending records, see "Defining a range" on page 489.

Identify the inventory status required for a copy to appear in the list.

If you selected the "Missing" inventory status, identify the range of years you want to include in the inventory list.

After selecting your report options, click Print.

See also: For an explanation of the printing process, see page 495. For information about the inventory process and statuses, see Chapters 19 and 20. For Global Delete Missing Copies, see page 330.

The following is an excerpt from an Inventory List by Call Number:

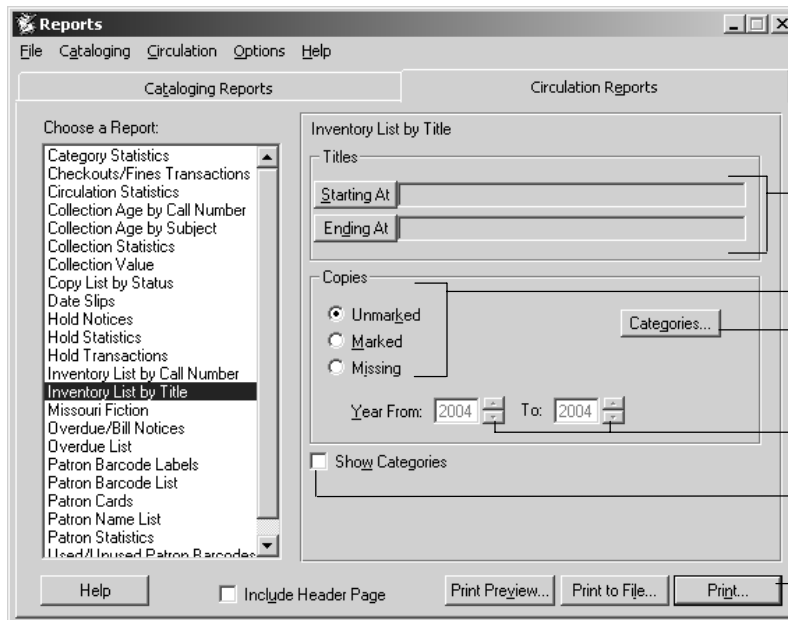
Displays the inventory status used to generate the report.

| Jackson Middle School Library | | | | |
|-----------------------------------|----------------------------------|-------|-----------|-----------|
| 10/3/2003 @ 4:17pm | Inventory by Call Number: Marked | | | Page 1 |
| Call Number Title | Barcode | Price | Circ Type | Last Date |
| 003.3 Cyberspace : first steps | T 21063 | 18.00 | Regular | 9/1/2001 |

If the item is currently checked out,
the date the copy was last checked out appears here.

Generating an Inventory List by Title

The Inventory List by Title lets you examine copies with a specific inventory status. This list is ideal if you want to compare the missing copies recorded in the library database to the copies on the library shelves. We suggest you run this list for unmarked copies before finalizing the inventory and for missing copies after it's finalized. Run it also before performing a Global Delete Missing Copies.



Select the range of titles for the list. For instructions on selecting the starting and ending records, see "Defining a range" on page 489.

Identify the inventory status required for a copy to appear in the list.

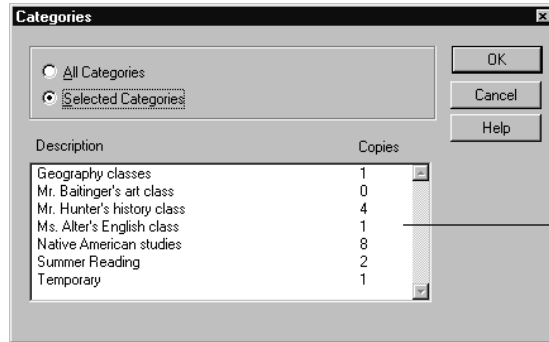
To limit the list to those copies with specific categories, click Categories.

If you selected "Missing," identify the range of years you want to include in the inventory list.

To print the categories assigned to each copy, select the Show Categories check box.

After selecting your report options, click Print.

To limit the categories used to generate the report, click Categories. The Categories dialog appears:



The selection list contains all categories created in System Setup and the number of copies assigned to each. For instructions on adding or removing categories, see "Increasing access to your collection with categories" on page 52.

If you want to limit the list to copies with specific categories, click Selected Categories, and then highlight each category you want to include. After selecting the desired category options, click OK.

See also: For an explanation of the printing process, see page 495. For information about the inventory process and statuses, see Chapters 19 and 20. For Global Delete Missing Copies, see page 330.

The following is an excerpt from an Inventory List by Title:

Displays the inventory status used to generate the report.

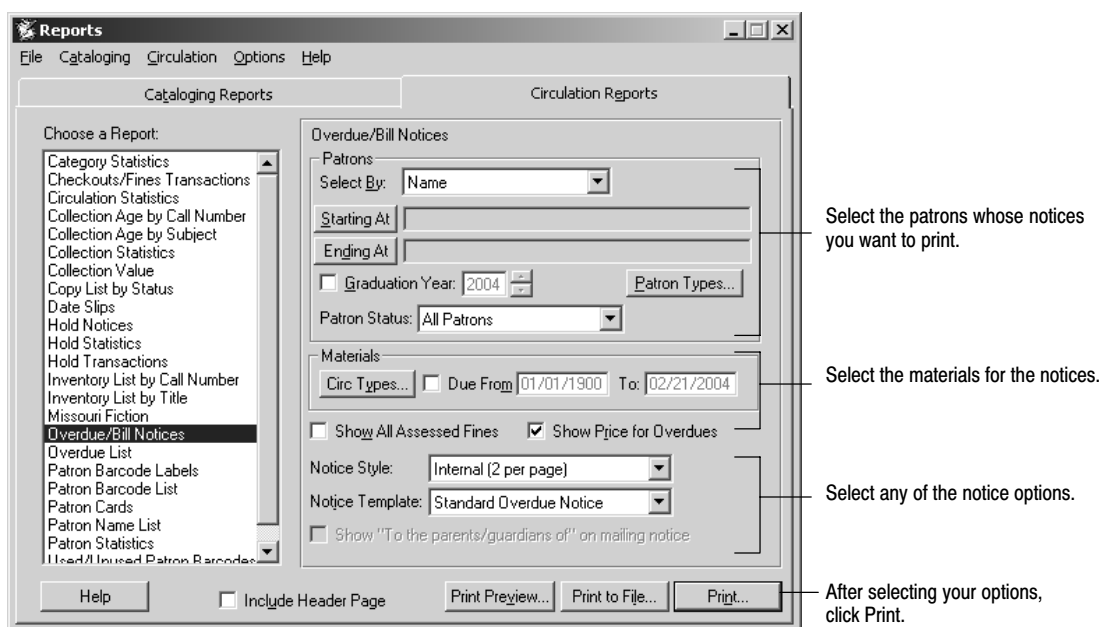
| Jackson School Library | | | | | |
|--|---------------------------------|------------------------|-----------|----------------------|--|
| 10/3/2003 @ 4:20pm | Inventory List By Title: Marked | | | Page 1 | |
| Title | Type | Price | Circ Type | Author | |
| LCCN/ISBN/ISSN | Barcode | | | | |
| Call Number | | | | | |
| Category | Category | | | | |
| A philosophical discourse concerning speech (1668) and | Books | 8.95 | Hourly | Cordemoy, Géraud de, | |
| 72006400 //r | | | | | |
| REF 401 | T 21132 | | | 12/3/2001 | |
| 2: Family Donations | | 4: Language Philosophy | | | |
| 6: Mr. Martzall's Summer Books | | | | | |

If the item is currently checked out, the date the copy was last checked out appears here.

Generating Overdue/Bill Notices

Use Overdue/Bill Notices to notify your patrons of overdue materials or outstanding fines. You can generate these notices in batches based on selected patron criteria. You can further limit the notices to items belonging to specific circulation types.

To generate notices as of a particular date, use the Set Report Date feature to override the current system date. From the Reports menu bar, select Options | Set Report Date. On the Set Report Date dialog that appears, select Use Special Date, type the new date, and select Save.



The Overdue/Bill Notices have these options:

- **Patrons:** Select the method for searching the library database. Then select the range of patrons for the notices. For instructions on selecting the starting and ending records, see page 489.

Note: Location and User Fields are customizable patron record prompts. For additional information on changing these prompts, see page 72.

To limit the notices to patrons belonging to specific patron types, click Patron Types (see page 493).

To limit the notices to patrons having a specific patron status, select the status from the Patron Status drop-down.

To limit the notices to patrons in a specific grade, select the Graduation Year check box, and enter the desired year.

- **Materials:** To limit the materials in the notices to materials of a specific circulation type, click Circ Types (see page 493).

To limit the notices to items due during a specific range of dates, select the Due From check box, and then enter the desired date range in the text boxes.

Note: Regardless of the date range, this option does not include items not currently overdue. To include items that are not yet overdue, you'll need to run the report as of a future date. For information on changing the report date, see page 494.

- **Show All Assessed Fines:** Includes outstanding assessed fines for overdue, damaged, and lost items, any user-defined fines, and refunds. Otherwise, the notices list only currently overdue materials.
- **Show Price for Overdues:** Includes the price of each copy in the notice. If the copy record doesn't specify a price, the notice displays the maximum fine amount you established in System Setup (see page 77). Use this option in concert with the "Standard Bill Notice" template in cases where the copy has been overdue for 30 days or more and is presumed lost. It normally isn't necessary if you are printing notices for items overdue only a few days.
- **Notice Style:** Reports provides you with specialized formats for internal and mailed distribution. Using the internal distribution format, you can print either one or two notices on a single page.

If you use the mailing format, each notice requires a separate page for each patron. When using this format, you can choose to include "To the parents/guardians of." This will print above the student's name and address.

- **Notice Template:** Select the desired wording template for the notices. Reports comes with two templates:

Standard Overdue Notice: Use this template to issue warnings and fines for items past due for a short time.

Standard Bill Notice: This notice contains a stronger tone than the Standard Overdue Notice. It is intended for use when the item in question has been overdue for a substantial period of time and you assume that the patron won't be returning it.

After selecting your report options, click Print.

See also: For an explanation of the printing process, see page 495.

For information on creating and using patron types and circulation types, see "Grouping your patrons by type" on page 69 and "Grouping your collection according to lending period" on page 45.

For information on customizing your notice templates, see "Customizing your overdue, bill, and ready hold notices" on page 82.

The notice heading includes, in addition to the name and barcode, the following patron information if it is available:

Mailing format: graduation year

Internal format: Location 1, Location 2, and graduation year.

For either format, the ID appears (along with the barcode) if you selected either ID or Barcode and ID as the Required Patron Field in System Setup | Setup | Patron Maintenance | Patron Defaults.

These samples of Overdue/Bill Notices are in the Internal format (2 per page):

Reports uses the salutation you defined for the patron's assigned patron type (see page 71).

| 10/01/2003 @ 4:20pm | | Jackson School Library Overdue/Bill Notices | | Page 1 |
|--|----------------------|--|-----------|---------|
| Homeroom : 406 | Library period : 4th | Grad: 2006 | | |
| | | Barcode: P 29487 | | |
| Dear Brad Majors: | | | | |
| The following items are overdue. Please return them as soon as possible. | | | | |
| Title | Call Number | Barcode | Due Date | Fine |
| ----- | | | | |
| The enchanted loom : mind in the universe | 574 JAS | T 21065 | 9/15/2003 | Overdue |
| 101 costumes for all ages, all occasions | 792 Cum | T 65872 | 9/15/2003 | Overdue |
| My place in space | 520 HIR | T 53229 | 9/20/2003 | Overdue |
| Be your own rock and mineral expert | 552 PIN | T 19884 | 9/20/2003 | Overdue |
| Car repairs you can make | 629 HAR | T 58739 | 9/20/2003 | Overdue |

Reports displays the wording you defined for the selected notice template (see page 82).

In this example, the copies are overdue only a few days, so we used the Standard Overdue Notice wording and did not select the Show Price for Overdues check-box.

In this example, some copies have been overdue for well over a month and we suspect the patron will not return them. We used the Standard Bill Notice wording and selected Show Price for Overdues and Show All Assessed Fines.

| 11/01/2003 @ 4:20pm | | Jackson School Library Overdue/Bill Notices | | Page 1 | |
|--|----------------------|--|-----------|---------|---------|
| Homeroom : 143 | Library Period : 3rd | Grad: 2006 | | | |
| | | Barcode: P 3549 | | | |
| Dear Ian McKellen: | | | | | |
| The following items are long overdue and assumed to be lost. Please pay the amount listed below as soon as possible. | | | | | |
| Title | Call Number | Barcode | Due Date | Fine | Price |
| ----- | | | | | |
| Big meetings, big results : strategic event planning fo | 658.4 MCM | T 56789 | 9/12/2003 | Overdue | \$45.45 |
| Wizardry : a treatise on things illusory | 823 VYS | T 58226 | 9/12/2003 | Overdue | \$29.95 |
| Total Price of Items | | | | | \$75.40 |
| | | | | | |
| Wizardry and wild romance | 823 MOO | T 45572 | Fine Owed | \$1.75 | |
| Saving a continent | 508 SMI | T 64811 | Fine Owed | \$1.50 | |
| Charge for Internet use | | | Fine Owed | \$2.00 | |
| Total Fines Outstanding | | | | | \$5.25 |

Any user-defined fine types appear on an Overdue/Bill Notice only if you select the Show All Assessed Fines option. To create custom fine types, see page 81.

The following Overdue/Bill Notice was created using the Internal (1 per page) distribution format with Show All Assessed Fines and Show Price for Overdues selected:

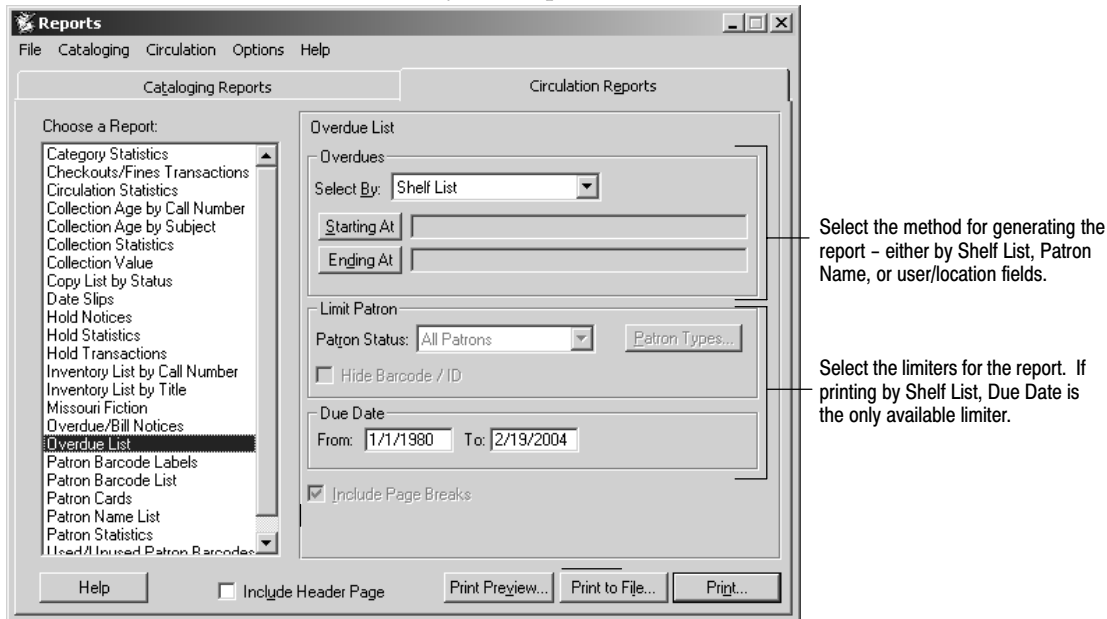
| 11/3/2003 @ 4:20pm | | Jackson School Library | | Page 1 | |
|--|-------------|------------------------|------------|---------------|---------|
| | | Overdue/Bill Notices | | | |
| Homerroom : Bettiscombe | | Library period : 6th | | Grad: 2009 | |
| | | | | Barcode: 1929 | |
| Dear Penelope Hobhouse: | | | | | |
| The following items are overdue. Please return them as soon as possible. | | | | | |
| Title | Call Number | Barcode | Due Date | Fine | Price |
| ----- | | | | | |
| A kid's first book of gardening : growing plants indoors | 635 FEL | T 31055 | 10/09/2003 | Overdue | \$9.95 |
| Growing colors | 535.6 MCM | T 76589 | 10/09/2003 | Overdue | \$11.88 |
| Margaret Rutherford : an autobiography | 792 Rut | T 18927 | 10/09/2003 | Overdue | \$17.00 |
| Total Price of Items | | | | | \$38.83 |
| ABC book of flowers for young gardeners | 635.9 STO | T 86061 | Fine Owed | \$3.50 | |
| The agony of the leaves : the ecstasy of my life with tea | 641.3 GUS | T 64021 | Fine Owed | \$.75 | |
| The best of Gooseberry Patch : a collection of fresh reci | 635 MAR | T 85542 | Fine Owed | \$.25 | |
| Total Fines Outstanding | | | | | \$4.50 |

The following Overdue/Bill Notice was created using the Mailing (1 per page) distribution format, including "To the parents/guardians of" above the patron name:

| Jackson School Library | | | | |
|---|----------------------|-----------------------|------------------|-----------------|
| 10/3/2003 @ 4:20pm | Overdue/Bill Notices | Page 1 | | |
| To the Parents of: Frank L. Wright: | | Graduation Year: 2006 | | |
| The following items are overdue. Please return them as soon as possible. | | | | |
| Title | Call Number | Barcode | Due Date | Fine Price |
| ABC of architecture | 720 OGO | T 21066 | 9/09/2003 | Overdue \$10.76 |
| Architect : a candid guide to the profession | 720.23 Lew | T 56789 | 9/09/2003 | Overdue \$21.96 |
| Total Price of Items | | | | \$32.72 |
| Inside Japan | 952.04 JAM | T 21061 | Fine Owed | \$1.50 |
| Arches to zigzags : an architecture alphabet | 721 CRO | T 21064 | Fine Owed | \$.75 |
| Total Fines Outstanding | | | | \$2.25 |
| Jackson Middle School Library 123 Apple Tree Lane Springgreen, IL 60050 | | | | |
| To the parents/guardians of Frank L. Wright 123 Prairie Ave. Springgreen, IL 60050 | | | Barcode : P 3549 | |

Generating an Overdue List

The Overdue List provides you with a simple list of patrons with overdue copies. If you need to check to see if the materials are on the shelf before you issue Overdue Notices, you can print this list in Shelf List order.



The Overdue List has these options:

- **Shelf List:** Select the method for searching the library database. Then select the range of call numbers for the report. For instructions on selecting the starting and ending records, see page 489.
- **Patrons:** Select the method for searching the library database – Name, Location fields, or User fields. Then select the range of patrons for the report. For instructions on selecting the starting and ending records, see page 489.

Note: Location and User Fields are customizable patron record prompts. For additional information on changing these prompts, see page 72.

To limit the report to patrons having a specific patron status, select the status from the Patron Status drop-down.

To limit the report to patrons belonging to specific patron types, click Patron Types (see page 493).

To keep the patron's Barcode / ID from printing on the list, check the Hide Barcode / ID check box.

To limit the report to materials due at a specific time, enter a Due Date range.

Note: Regardless of the date range you enter, this option will not include items not currently overdue. To include items that are not yet overdue, you'll need to run the report as of a future date. For information on changing the report date, see page 494.

The following is an excerpt from the Overdue List printed by Shelf List:

| Central Columbia M. S. Library | | | |
|--------------------------------|---------------------------|---------|------------|
| 2/19/2004 @ 6:33am | Overdue List | Page 1 | |
| Call Number | Title | Barcode | Due Date |
| 796.357 SUL | The art of base-stealing | T 18776 | 03/11/2004 |
| FIC STE | Nine coaches waiting | T 17249 | 02/21/2004 |
| FIC TRA | 2 Spruce Lane | T 18680 | 08/08/2004 |
| PB FIC | Eight tales of terror | T 6418 | 02/21/2004 |
| PB FIC MAG | Seven spiders spinning | T 24963 | 02/21/2004 |
| PB FIC RIN | The second bend in the ri | T 26236 | 02/21/2004 |

The following is an excerpt from the Overdue List printed by Patron Name:

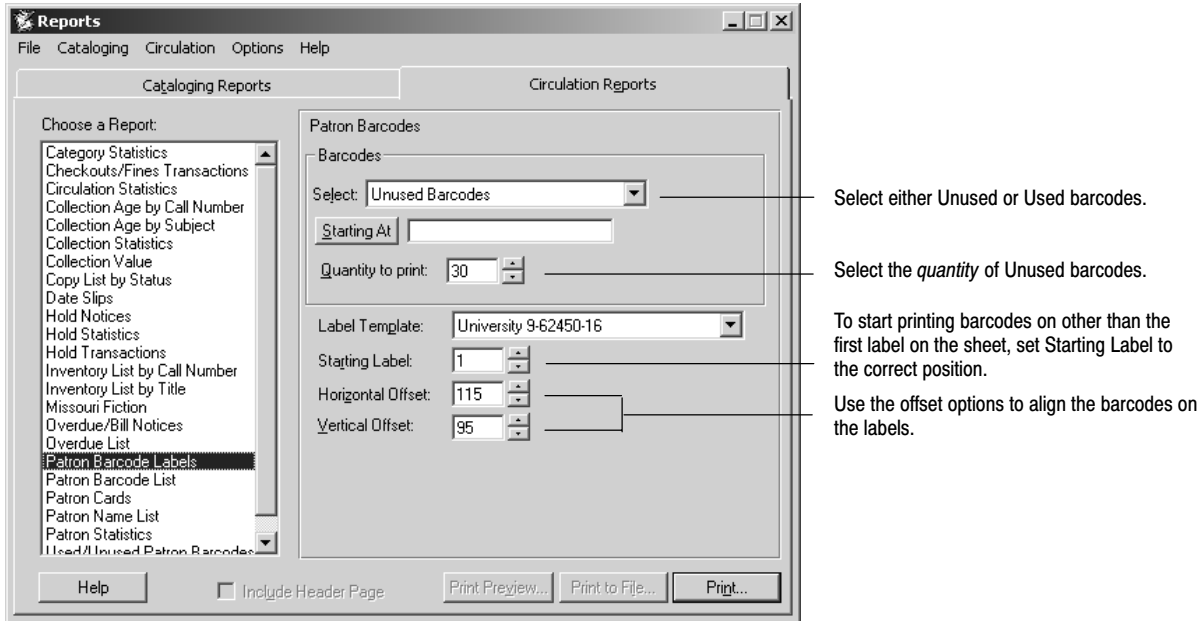
| Central Columbia M. S. Library | | | | |
|--------------------------------|---------------------------|---------|------------|--|
| 2/19/2004 @ 6:37am | Overdue List | Page 1 | | |
| Patron Name | Barcode/ID | Barcode | Due Date | |
| Call Number | Title | | | |
| Abbate, Amanda | P 35726 | | | |
| 796.357 SUL | The art of base-stealing | T 18776 | 03/11/2004 | |
| FIC STE | Nine coaches waiting | T 17249 | 02/21/2004 | |
| Abraczinskas, Emily | P 33427 | | | |
| PB FIC RIN | The second bend in the ri | T 26236 | 02/21/2004 | |

Printing Patron Barcode Labels

Patron Barcode Labels lets you create new or replacement barcode labels for your patrons. On new barcodes, it prints your full site name (retrieved from System Setup | Site | Identification), the scannable barcode, and the eye-readable barcode number. On replacement barcodes, it prints the patron's first name, middle initial, and last name (retrieved from Patron Maintenance), the scannable barcode, and the eye-readable barcode number.

The application retrieves the barcode number from the Patron Barcode field and your barcode symbology from System Setup | Site | Barcodes | Patrons. If your symbology is Code 39 (generic, or Mod 10, 11, or 43) or Codabar (generic or Mod 10), the barcodes print in that symbology. If your symbology is anything else, the barcodes print in the Code 39 symbology. Even though the symbology may be different, your scanner and PHD can read the barcodes.

Important: If Circulation Plus is installed on a server and not on your workstation, you or your technician must install the barcode fonts to your workstation before printing barcodes. To do so, insert our product installation disk into your CD drive, select the Workstation tab, highlight Barcode Fonts for Reports, and click Install. For a Mac OS workstation, run the Workstation Installer, and select the Barcode Fonts check box. Your Macintosh restarts when the installation is complete.



Patron Barcode Labels have the following options:

- **Barcodes:** Select a method for identifying barcodes to be printed.

If you select Unused Barcodes, press Starting At, and choose either your highest barcode or the last barcode before a gap in your barcode sequence. Then select the number of barcodes (up to 990) that you want to print.

If you select Used Barcodes, press Starting At and Ending At to select the range of barcode numbers that you want. The application prints only the barcode numbers in use within that range; it skips any unused barcode numbers. For instructions on selecting the starting and ending numbers, see page 487.

If you select Used barcodes by Barcode List, click Edit List to add or remove numbers. For instructions on building lists, see page 492.

If you select Used barcodes by Location or User Fields, enter the Starting and Ending range.

Note: Location and User Fields are customizable patron record prompts. For additional information on changing these prompts, see page 72.

- **Template:** Only one template is currently supported. It is available from Follett Software Company, product # 75032 (1-800-323-3397), or from

University Products, Inc., product # 9-62450-16 (1-800-628-1912, <http://www.librarysuppliers.com>). The label stock has 30 labels per sheet, 3 across and 10 down. Each label is 2 5/8" by 1".

- **Starting Label:** To start printing on other than the first label on the sheet, set this to the correct position. Reports counts labels from left to right/top to bottom. For example, to start printing on the first label of the third row, set Starting Label to 7.
- **Offsets:** Use the offset options to fine-tune the printing alignment. The horizontal and vertical offsets let you adjust the left and top margins, respectively. Each increment is equal to 1/10th of a millimeter. The offsets required vary from printer to printer. These offsets are in addition to the unprintable area defined in your printer's properties.

Important: Before you print from a Mac OS workstation, you must also select File | Page Setup and choose the 8.5" x 11" paper with the smallest margins (approximately .17" left/right and .11" top/bottom). Depending on your printer, you may also have to select the option for a larger print area. Please note that the page setup reverts to its default settings when you close Reports.

Important: This feature is intended for use on laser, not inkjet, printers.

The first time you print barcodes at a workstation, print a few tests on plain paper, and do the following:

- Make sure that the barcode is centered on the label. If not, adjust the offsets and try again. Scanners require some white space at either end of the barcode bars. When you print, Reports saves the offset settings you used at the workstation so that you do not have to set them again.
- Make sure that your scanner and/or PHD can read the barcodes. The quality of the printout varies from printer to printer; some older printers cannot produce scanner-readable barcodes. All testing was done using laser printers. In addition, the type of scanner you have and the maximum width of its laser beam affect its ability to read the barcodes.

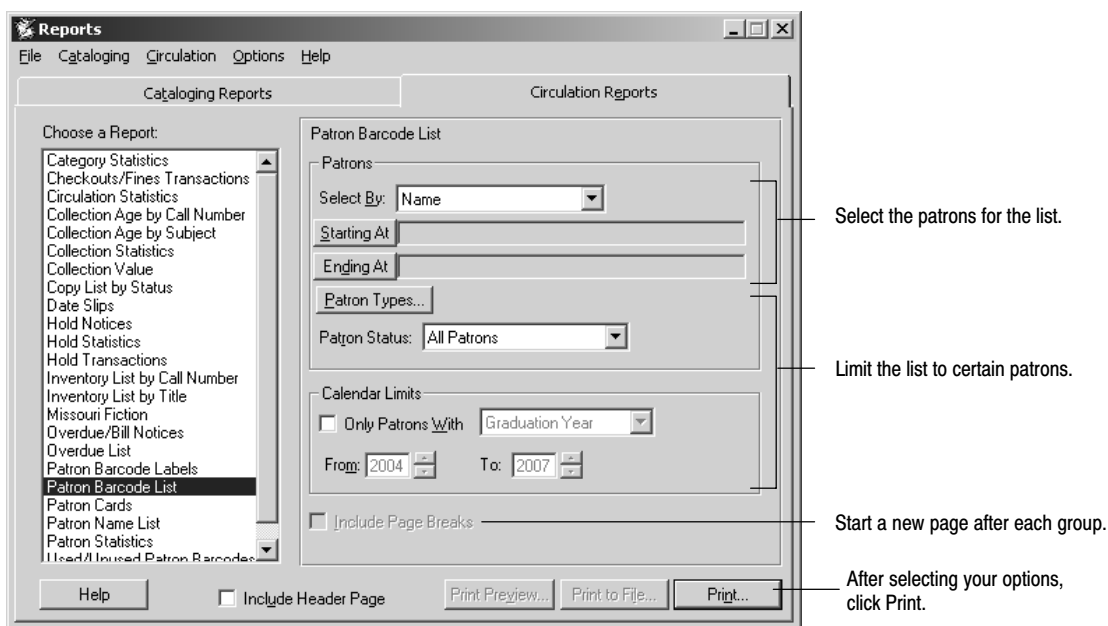
Generating a Patron Barcode List

The Patron Barcode List lets you create a list of patron names and barcodes for easy scanning of patrons at the Circulation Desk. Barcode lists can be alphabetic by patron, a group of patrons selected via a PHD, or by a group as determined by location or user fields.

Important: This feature is intended for use on laser, not inkjet, printers.

The application retrieves the barcode number from the Patron Barcode field and your barcode symbology from System Setup | Site | Barcodes | Patrons. If your symbology is Code 39 (generic, or Mod 10, 11, or 43) or Codabar (generic or Mod 10), the barcodes print in that symbology. If your symbology is anything else, the barcodes print in the Code 39 symbology. Even though the symbology may be different, your scanner and PHD can read the barcodes.

Important: If Circulation Plus is installed on a server and not on your workstation, make sure you have installed the barcode fonts to your workstation. If you have not, follow the instructions on page 568 to install them from our CD.



The Patron Barcode List has these options:

- **Patrons:** Select the method for searching the library database. Then select the range of patrons for the report. For instructions on selecting the starting and ending records, see page 489.

Note: Location and User Fields are customizable patron record prompts. For additional information on changing these prompts, see page 72.

- **Limiters:** To limit the report to patrons belonging to specific patron types, click Patron Types (see page 493).





For patrons with a specific status, select the one you want.

For patrons with certain graduation years or library card expiration dates, select the Only Patrons With check box, choose Graduation Year or Card Expiration Date, and enter the desired range of years.

- **Page Breaks:** Select the check box to start a new page after each group in the report. Groups are determined by the criterion you selected in the Select By list. This option is only available if you chose a location or user field.

After selecting your report options, click Print.

The following is an excerpt from a Patron Barcode List:

| Jackson School Library | | | |
|------------------------|--|--------------------|--|
| 7/12/2001 @ 2:30 pm | Patron Barcode List | | Page 1 |
| Aard, Anders Anthony |  | Aard, Burton Blunt |  |
| | 201015 | | 201026 |
| Abbott, Krystal Faye |  | Acosta, Arturo |  |
| | P1216 | | P1995 |

The first time you print a barcode list at a workstation, print a few tests and make sure that your scanner and/or PHD can read the barcodes. The quality of the printout varies from printer to printer; some older printers cannot produce scanner-readable barcodes. In addition, the type of scanner and the maximum width of its laser beam affect its ability to read the barcodes.

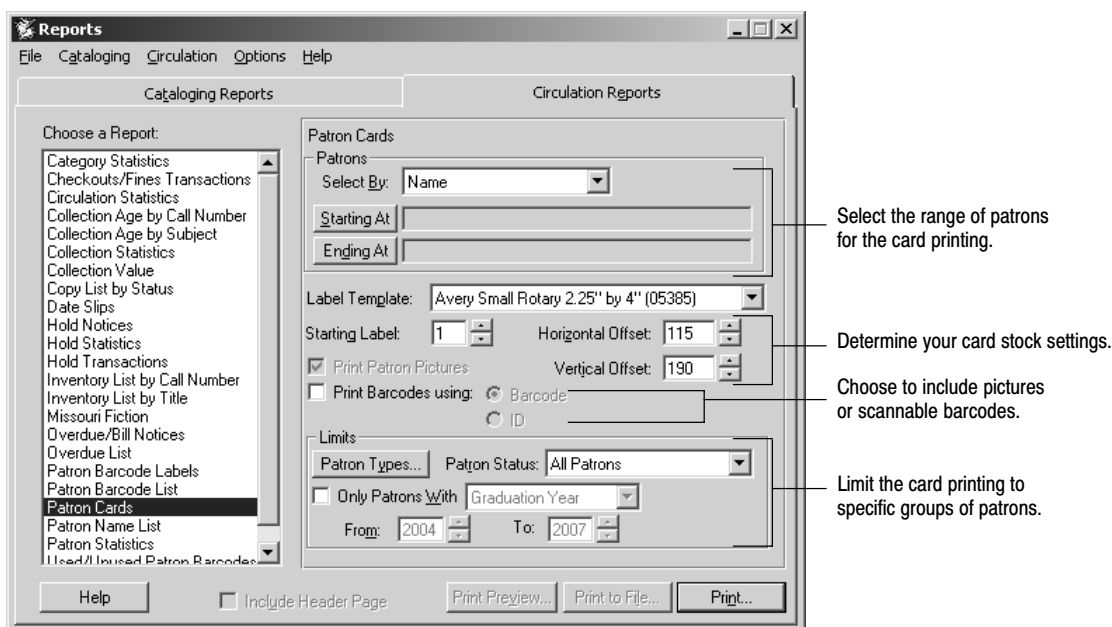
See also: For an explanation of the printing process, see page 495.

For instructions on collecting patron scans with the PHD+, PHD+ II, or PHD Laser+, see page 663.

To collect patron scans with a PHD Dolphin+, see page 676.

Generating Patron Cards

Patron Cards lets you print several kinds of patron cards: Rolodex/rotary cards to be kept at the circulation desk; ID cards to be carried by the patrons; and 3" x 5" cards to be kept in a file drawer. The information on the patron card varies according to the template selected. See the table on page 574 for specifics.



The Patron Cards have these options:

- **Patrons:** Select the method for searching the library database. Then select the range of patrons for the report. For instructions on selecting the starting and ending records, see page 489.

Note: Location and User Fields are customizable patron record prompts. For additional information on changing these prompts, see page 72.

- **Label Template:** Select the template that matches your card stock.
- **Starting Label:** To start printing on other than the first card on the sheet, set this to the correct position.
- **Offsets:** To fine-tune where printing starts on the card, use the offset options. The horizontal and vertical offsets let you adjust the left and top margins, respectively. Each increment is equal to 1/10th of a millimeter. See the table on page 573 for the recommended offsets for each template.

Note: The exact offsets for each template vary from printer to printer. To ensure that the printing is aligned correctly, print a few tests on plain paper the first time you use a template at a workstation. When you print, the Reports module saves the exact offsets for that template to the workstation. Please note that the offsets you define are in addition to the unprintable area defined in your printer's properties.

- If you select the Avery Patron ID Card (05361) template, select the Print Patron Pictures check box if you have pictures in your patron records and you want them on the cards.
- To include a scannable barcode on the card, select the Print Barcodes check box and then the Barcode or ID field. If you choose ID, the scannable barcodes include the forward slash (/) so that you can scan them in Circulation Desk. (Scannable barcodes are not available for pinfeed printers.)

Reports retrieves the number from the Patron Barcode or ID field and your barcode symbology from System Setup | Site | Barcodes | Patrons. If your symbology is Code 39 (generic, or Mod 10, 11, or 43) or Codabar (generic or Mod 10), the barcodes print in that symbology. If your symbology is anything else, the barcodes print in the Code 39 symbology. Even though the symbology may be different, your scanner and PHD can read the barcodes.

Important: If Circulation Plus is installed on a server and not on your workstation, make sure you have barcode fonts installed on your workstation. If you do not, follow the instructions on page 568 to install them from our CD.

- Limits: You can limit the card printing to those for certain patrons:
For specific patron types, click Patron Types (see page 493).
For patrons with a specific status, select the one you want.
For patrons with certain graduation years or library card expiration dates, select the Only Patrons With check box, choose Graduation Year or Card Expiration Date, and enter the desired range of years or expiration dates.

After selecting your report options, click Print.

Important: If you choose to include a scannable barcode, please note that they require a laser, not an inkjet, printer.

The first time you print patron cards with scannable barcodes, print a few tests and make sure that your scanner and PHD can read the barcodes. The quality of the printout varies from printer to printer; some older printers cannot produce scanner-readable barcodes. In addition, the type of scanner and the maximum width of its laser beam affect its ability to read the barcodes.

| Template | Horizontal Offset* | Vertical Offset* | Lines per card | Chars per line |
|---|--------------------|------------------|----------------|----------------|
| Avery Small Rotary 2.25" by 4" (05385) | 115 | 190 | 9 | 35 |
| Avery Large Rotary 3" by 5" (05386) | 460 | 200 | 16 | 47 |
| Avery ID Card 2" by 3.25" (05361) | 600 | 150 | 11 | 29 |
| Rolodex ID 2.25" by 4" (67620) | 600 | 205 | 9 | 35 |
| Pinfeed ID Card ** 1 2/3" by 2 7/8" (Follett product no. 75093) | 80 | NA | 8 | 32 |

| Template | Horizontal Offset* | Vertical Offset* | Lines per card | Chars per line |
|--|--------------------|------------------|----------------|----------------|
| Pinfeed Cont. Rolodex Card ** 2 1/6" by 4" (Follett product no. 75031) | 80 | NA | 8 | 45 |

* Estimates only. Actual horizontal and vertical offsets vary from printer to printer.

** The pinfeed label templates are not available on Mac OS.

Stock for the templates supported by Patron Cards is available from the following vendors: Follett Software Company (1-800-323-3397); Avery (1-800-462-8379, <http://www.avery.com>); Demco, Inc. (1-800-356-1200, <http://www.demco.com>); and University Products Inc. (1-800-628-1912, <http://www.librarysuppliers.com>).

Important: Before you print from a Mac OS workstation, you must also select File | Page Setup and choose the 8.5" x 11" paper with the smallest margins (roughly .17" left/right and .11" top/bottom). Depending on your printer, you may also have to select the option for a larger print area. Please note that the page setup reverts to its default settings when you close Reports.

The information on the patron card varies according to the template selected. Use the following table to determine the fields that print on your card stock:

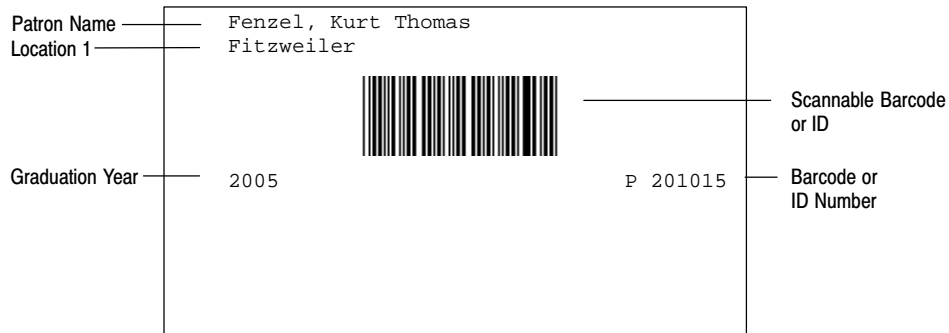
| Template | Site name | Patron name | Scannable barcode | Barcode number | ID number | Loc 1 | Grad year | Birth date | Patron picture |
|--|-----------|-------------|-------------------|----------------|-------------|-------|-----------|------------|----------------|
| Avery small rotary 2.25" by 4" (05385) | | X | X | If selected | If selected | X | X | | |
| Avery large rotary 3" by 5" (05386) | | X | X | If selected | If selected | X | X | | |
| Avery ID Card 2" by 3.25" (05361) | X | X | X | X | X | | | X | X |
| Rolodex ID 2.25" by 4" (67620) | | X | X | If selected | If selected | X | X | | |
| Pinfeed: ID Card (75093A) | X | X | | X | X | | | X | |
| Pinfeed: Cont. Rolodex Cards (75031) | X | X | | X | X | | | X | |

See also: For an explanation of the printing process, see page 495.

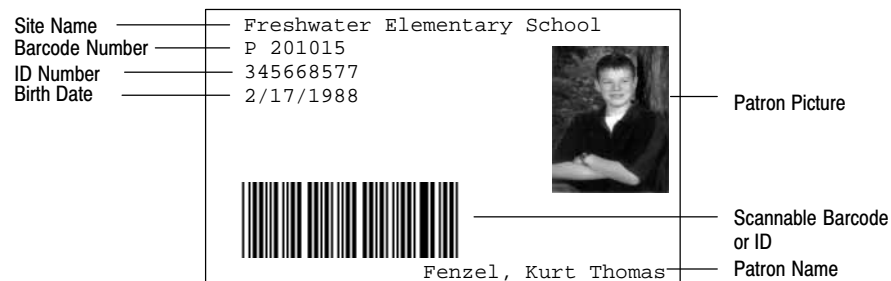
For instructions on collecting patron scans with the PHD+, PHD+ II, or PHD Laser+, see "Collecting inventory, copy, or patron data" on page 663.

To collect patron scans with a PHD Dolphin+, see page 676.

The following is a sample of an Avery Small Rotary 2.25" by 4" (05385) card:



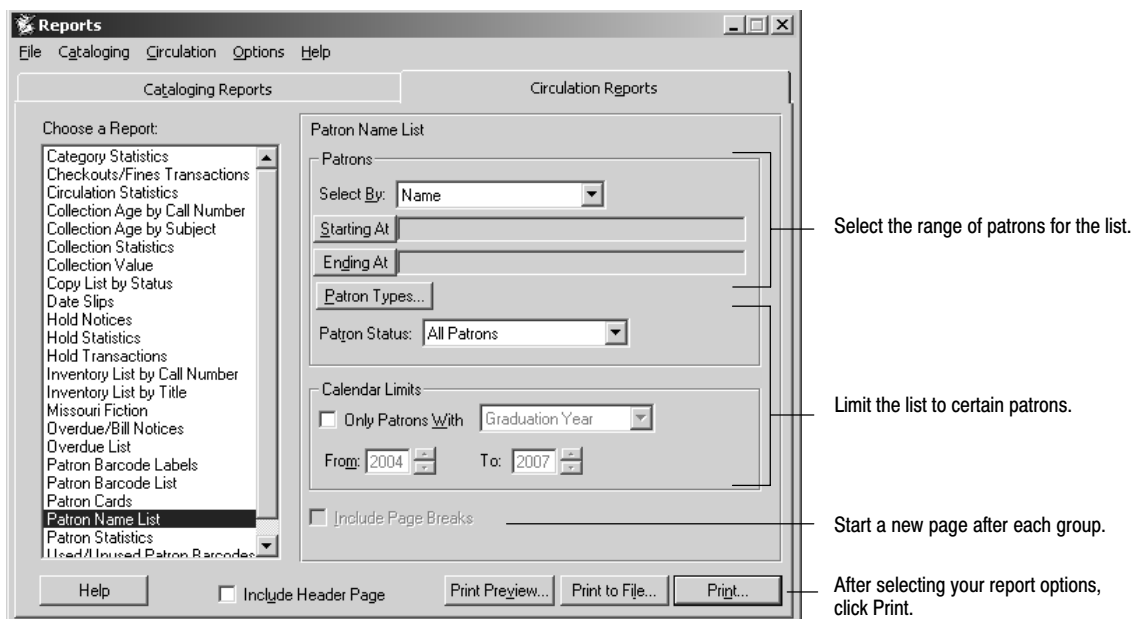
The following is a sample of an Avery ID (05361) card:



Generating a Patron Name List

The Patron Name List lets you create customized lists of selected patrons. If your library has a PHD, you can use this list to generate attendance lists or provide staff members conducting remote circulations with a list of patrons that are restricted, inactive, or with expired library cards. You can also generate lists of patrons based on graduation years or patron types.

Note: Patron types are labels, created and assigned by the library staff, used to identify specific groups of patrons. For information on creating and using patron types, see page 69.



The Patron Name List has these options:

- **Patrons:** Select the method for searching the library database. Then select the range of patrons for the report. For instructions on selecting the starting and ending records, see page 489.

Note: Location and User Fields are customizable patron record prompts. For additional information on changing these prompts, see page 72.

- **Limits:** You can limit the list to certain patrons:

For specific patron types, click Patron Types (see page 493).

For a specific Patron Status, select it from the list.

For patrons with certain graduation years or library card expiration dates, select the Only Patrons With check box, choose Graduation Year or Card Expiration Date, and enter the desired range of years.

- **Page Breaks:** Select the check box to start a new page after each group in the report. Groups are determined by the criterion you selected in the Select By list. This option is only available if you chose a location or user field.

See also: For an explanation of the printing process, see page 495.

For instructions on collecting patron scans with the PHD+, PHD+ II, or PHD Laser+, see “Collecting inventory, copy, or patron data” on page 663.

To collect patron scans with a PHD Dolphin+, see page 676.

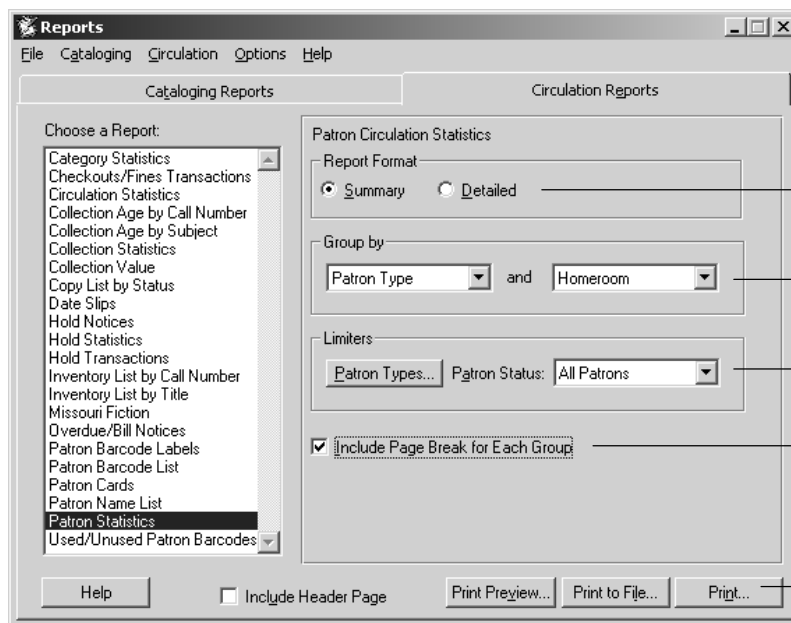
The following is an excerpt from a Patron Name List:

| Jackson School Library | | | | |
|------------------------|------------------|--------------|--------|--|
| 10/3/2003 @ 4:41pm | Patron Name List | | Page 1 | |
| ----- | | | | |
| Homeroom | | | | |
| Patron Name | Barcode | ID | | |
| Patron Status | Exp Date | Grad YR | Type | |
| ----- | | | | |
| B-014 | | | | |
| Abright, Jessica | P 1 | 874-733-2121 | | |
| Active | 6/1/2005 | 2005 | S | |

Generating a Patron Statistics Report

The Patron Statistics Report lets you examine the circulation statistics for your patrons grouped by patron type and location or user fields. Use this report to measure the impact of library reading programs on circulation or to monitor the circulation habits of each patron type using your library.

Note: Patron types are created and assigned by the library staff and are used to identify specific groups of patrons. For information on creating and using patron types, see page 69.



The Summary report displays statistics associated with the selected groups. The Detailed report displays statistics for individual patrons in the selected groups.

Select the field(s) you would like to group by. Options include Patron Type, user fields, and location fields.

Limits report to specific groups of patrons.

Starts a new page after each group.

After selecting your report options, click Print.

Note: If you want to calculate the patron statistics as of a particular date, you can use the Set Report Date feature to override the current system date. For more information, see “Changing the date used to run reports,” page 494.

See also: For an explanation of the printing process, see page 495.

The following is an excerpt from the Patron Statistics Report using the summary format:

| Jackson School Library | | | | | |
|------------------------|-------------------------------|-----------|-----------|-----------|---------|
| 10/3/2004 @ 4:43pm | Patron Circulation Statistics | | | | Page 1 |
| ----- | | | | | |
| Patron Type | | | | | |
| Homeroom | Monthly | Yearly | Last Year | Total | Patrons |
| ----- | | | | | |
| Student | | | | | |
| Homeroom Granger | 1 (8%) | 10 (11%) | 22 (21%) | 50 (22%) | 10 |
| Homeroom Smith | 6 (46%) | 31 (33%) | 45 (45%) | 81 (35%) | 15 |

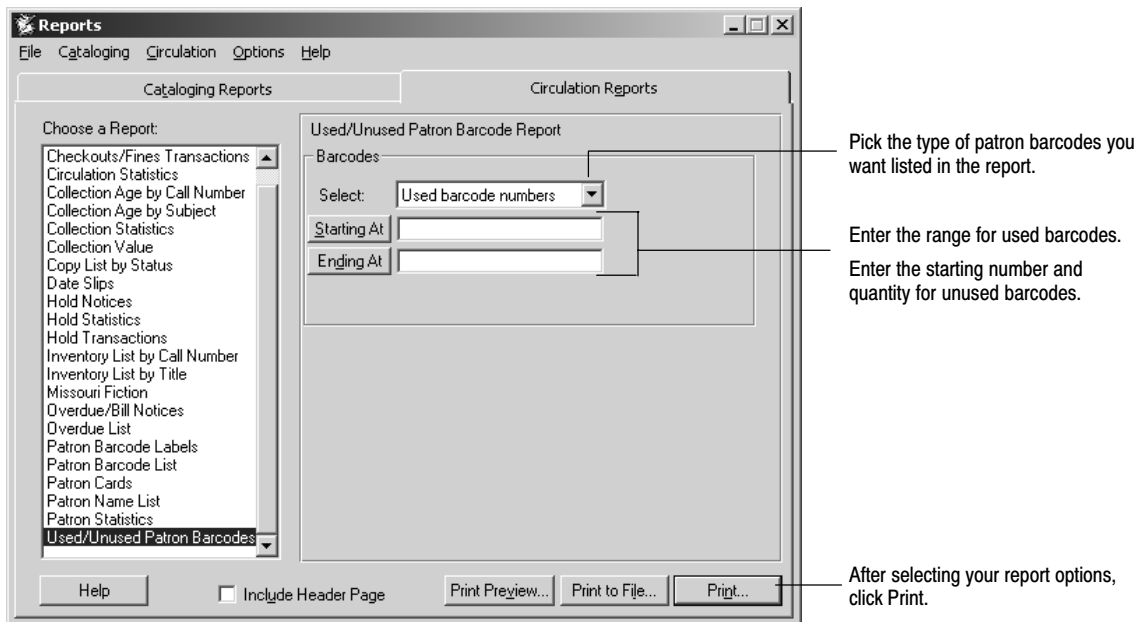
The following is an excerpt from the Patron Statistics Report using the detailed format:

| Jackson School Library | | | | | |
|----------------------------|-------------------------------|--------|-----------|-------|--------|
| 10/3/2004 @ 4:43pm | Patron Circulation Statistics | | | | Page 1 |
| ----- | | | | | |
| Patron Type & Homeroom | | | | | |
| Patron/Barcode | Monthly | Yearly | Last Year | Total | |
| ----- | | | | | |
| Student & Homeroom Granger | | | | | |
| Aten, Lori/P 16 | 6 | 12 | 46 | 64 | |
| Ruckle, Emily/P 13 | 2 | 6 | 27 | 35 | |

Note: Percentages on the Patron Circulation Statistics Reports are rounded up.

Generating a Used or Unused Patron Barcodes Report

The Used/Unused Patron Barcodes Report lets you create a list of patron barcode numbers that are already assigned to patrons or that are available for reassignment. Give a copy of this list to your staff before they enter new patrons into the library database.



The Patron Barcode Report has these options:

- Barcode Type: Select Used or Unused.
- Range: For a list of used barcodes, select or enter the range of barcodes you want. For help on selecting the starting and ending records, see page 489.
- Quantity: For a list of unused barcodes, select or enter the starting barcode number and the quantity of barcodes you want included in the report.

Note: Make sure the barcode numbers entered in the Starting At and Ending At fields match the symbology defined in System Setup | Setup | Site | Barcodes | Patrons (see page 37).

The following are excerpts from Used/Unused Patron Barcodes Reports:

Displays the barcode symbology defined for patrons in System Setup (see page 37).

```
Jackson School Library  
10/13/2003 @ 4:47pm    Used/Unused Patron Barcode: Used Barcodes    Page 1  
-----  
Barcode Number/Range  
-----  
Symbology = Follett Classic  
P 7450  
P 7454  
P 7460  
P 7463 - P 7464  
P 7467
```

If you picked Used barcode numbers, the report displays consecutive barcodes as a range of barcodes.

```
Jackson School Library  
10/13/2003 @ 4:48pm    Used/Unused Patron Barcode: Unused Barcodes    Page 1  
-----  
Barcode Number/Range  
-----  
Symbology = Follett Classic  
P 7451  
P 7452  
P 7453
```

If you picked Unused barcode numbers, the report displays each barcode in the report on a separate line.

Chapter 39 System reports

This chapter contains information about two reports that contain information about your system: System Circulation Statistics and System Information.

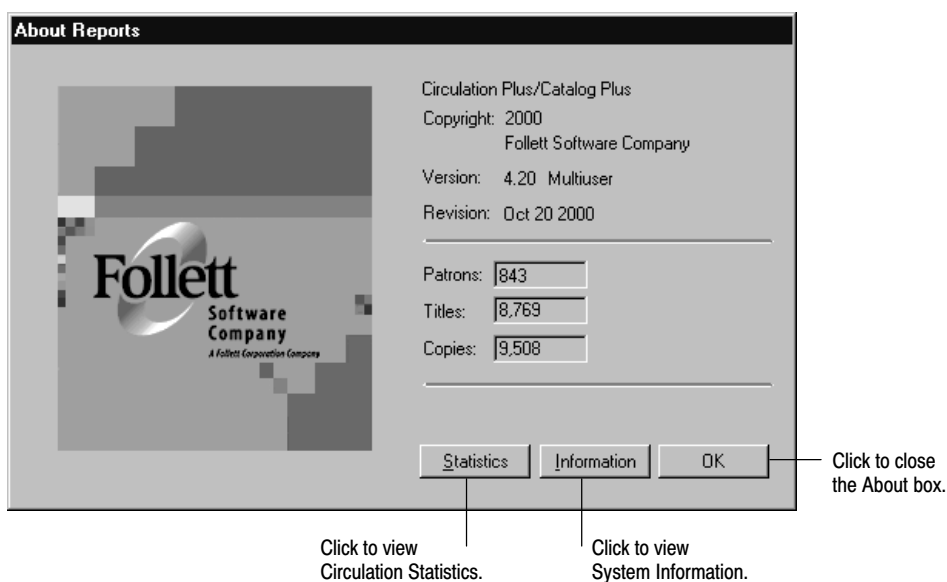
Unlike all other reports which are available only in the Reports module, these system reports are accessible from five other modules as well: Cataloging; Circulation Desk; Inventory; Patron Maintenance; and System Setup.

How many overdue books are there today? How many checkouts have we had this year? How many total copies do we have? Access your summary statistics without running a report.

Ordering books? Find out your highest barcode used and your barcode symbology here. Network problems? You can find the IP address of your server and your workstation here. When do holds expire? Do we charge fines on grace days? Access your setup information quickly, without opening System Setup.

Is an inventory in progress? What comport do I connect my PHD to? All these questions, and more, can be answered by viewing one of the system reports.

To access the reports, select Help from the menu (not the Help button) in one of these modules. Click on About <module name>. The About window displays the total number of patrons, titles, and copies in your database. Then choose either the Statistics (if you have Circulation Plus) or the Information button.



Generating your System Circulation Statistics

To view your circulation statistics, click the Statistics button. The System Circulation Statistics dialog appears. This window displays the number of circulations and holds placed during a given time period for your library:

Acceptable values are 1-90.

| Period | Circulations | Holds Placed |
|---------|--------------|--------------|
| 03/2000 | 214 | 15 |
| 02/2000 | 136 | 13 |
| 01/2000 | 258 | 11 |
| 12/1999 | 165 | 20 |
| 11/1999 | 198 | 24 |
| 10/1999 | 128 | 10 |
| TOTAL | 1099 | 93 |

List includes Years, Months, Days, and Hours.

Updates the current data with the system's circulation statistics for the selected period.

Prints directly to you printer.

For Union Catalog Plus: The System Circulation Statistics Report is not available.

Generating a System Information Report

To view several kinds of information about your system, click the Information button. The System Information Report opens in your text viewer where it can be edited or printed. This report, divided into sections, provides a quick way to access circulation, setup, and network information about your library:

- Summary information on checkouts, overdues, fines, and holds
- The total numbers of titles, copies, and patrons in your database
- The highest barcodes used for copies and patrons
- Your site identification and information
- Your patron and library barcode symbologies
- PHD port information
- Cataloging setup information
- Default patron type, required patron field, and patron empowerment information
- Setup information on your holds, fines, and notices
- Inventory statistics: numbers of marked, missing, and unmarked; and whether an inventory is open or closed

- The contents of the Servers.ini file that identifies your current server
- Your workstation configuration, including your unique-node mode, IP address, amount of memory, processor, and the operating system
- Product installation information (names, places, and dates) and the contents of your program directories

The following is an excerpt from a System Information Report:

| Freshwater Elementary School | |
|--|--------------------------------------|
| System Information | |
| 10/13/2000 @ 10:38am | |
| ----- | |
| Statistics | |
| ----- | |
| Current Checkouts | 14 |
| Current Overdues | 1 |
| Total Checkouts | 164 |
| Last Year's Checkouts | 864 |
| This Year's Checkouts | 41 |
| This Month's Checkouts | 11 |
| Today's Checkouts | 6 |
| Current Fines | 12 |
| Total Fines Due | \$154.85 |
| Current Holds | 3 |
| Utilization | |
| ----- | |
| Titles | 247 |
| Copies | 318 |
| Highest Copy Barcode Used | T 8842 |
| Patrons | 126 |
| Highest Patron Barcode Used | P 964 |
| DX Records | 17 |
| Database ID | 6B658CA0-7B7K-11D4-A071-0080C745F288 |
| Data Exchange Retry time | 30 |
| Member Data Exchange IP address | 168.192.0.2 |
| Participation Level | 3 |
| Filters | |
| Material Types: | <none> |
| Categories: | Temporary, Category 1 |
| Call Number Prefixes: | TEM |
| Circulation Types: | TEM |
|] Appears only for DX members of union catalogs. | |
| Site | |
| ----- | |
| Identification | |
| ----- | |
| Full Site Name | Freshwater Elementary School |
| Short Site Name | FES |
| MARC Organization Code | IMch-FES |
| Contact Person | Alison Dunlop |
| Address Line 1 | 535 Green Bay Road |
| Address Line 2 | |
| City | McHenry |
| State | IL |
| Zip Code | 60050 |

While other reports and module windows provide this same information separately, the System Information Report is an easy place to obtain it quickly and conveniently.

Note: If you need to contact Follett Technical Support for assistance at any time, please have this report on-screen or printed out.

More information for union catalogs and members

If yours is a union catalog, your report omits circulation and inventory statistics, and barcode, PHD, and patron information. It adds, however, data exchange information about the union catalog and each member. In the Utilization section are the number of DX records in the transfer queue, the database ID, the retry time, and the IP address of the union catalog's Data Exchange Server. In the Member Information section are the full site name, MOC, member ID, the member's Data Exchange Server IP address, participation levels, and filters of each DX member. The information for each non-DX member is limited to the full site name, MOC, and member ID.

If your site is a DX member, the Utilization section of the report includes your database ID, the retry time, the IP address of your Data Exchange Server, and your participation level and filters. See the illustration on page 583.

| 10/13/2003 @ 10:38am | | Guthrie Union Catalog System Information | |
|---------------------------------|--------------------------------------|---|------|
| ----- | | | |
| | | | |
| | | | |
| Utilization | | | |
| ----- | | | |
| Titles | | | 6247 |
| Copies | | | 9318 |
| DX Records | | | 17 |
| Database ID | 6B658CAO-7B7K-11D4-AO71-0080C745F288 | | |
| Data Exchange Retry time | | | 30 |
| Union Data Exchange IP address | | 168.192.0.2 | |
| | | | |
| | | | |
| Member Information | | | |
| ----- | | | |
| 1. Freshwater Elementary School | | | |
| MOC | | IMchG-FES | |
| Member ID | | 10904 | |
| Data Exchange IP address | | 168.192.2.0 | |
| Participation Level | | 3 | |
| Filters | | | |
| Material Types: | | <none> | |
| Categories: | | Temporary, Category 1 | |
| Call Number Prefixes: | | TEM | |
| Circulation Types: | | TEM | |
| 2. Sunnydale Elementary School | | | |
| MOC | | IMchG-SES | |
| Member ID | | 10908 | |
| Non-DX Member | | | |

Chapter 40 Extracting data

This chapter contains general information on extracting data; instructions on how to extract data; suggestions for using the data; and a table of the fields included in the extraction files.

About extracting data

Extract Data allows you to retrieve information from your database without using our Reports module. You can retrieve four types of data:

- Copies/titles, by call number range
- Copy transactions, by date range
- Category transactions, by date range
- Patrons, by a range of names, location 1 or 2, or user field 1 or 2

The output file is in a comma-delimited ASCII format. That is, every field in the record is separated by a comma. (This is identical to the format of the Patrons.out file that you can generate from Export Patrons in Patron Maintenance.) The first record in the extract file is a header line, containing the names of the fields included in the file. These fields, for all four files, are listed in the table at the end of this chapter.

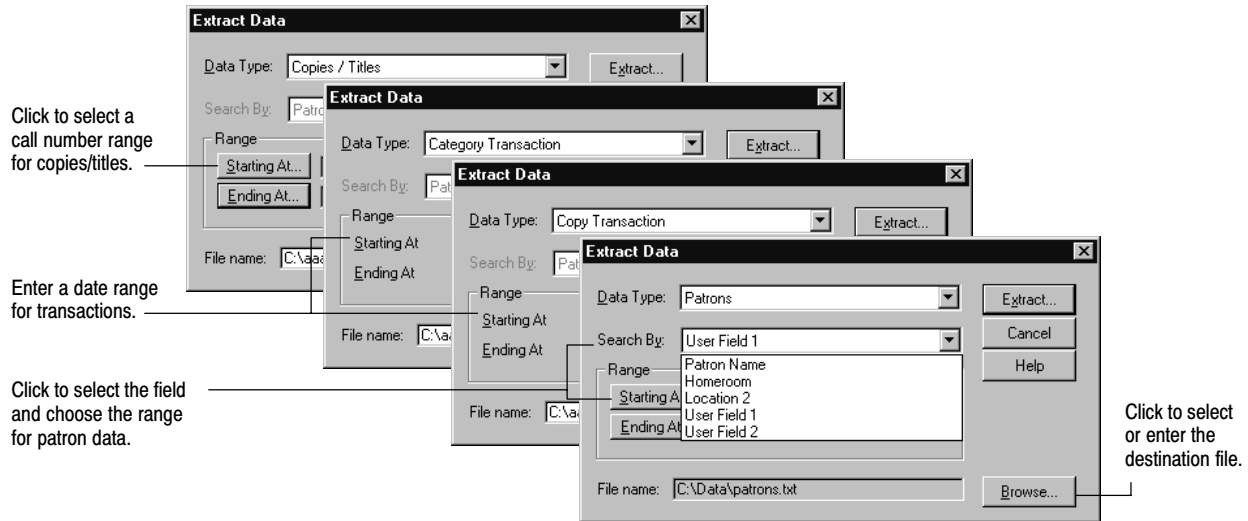
Note: If the Collect Patron Transaction Histories check box in System Setup is unchecked and you have removed patron history in Utilities, data linking patrons to copies will not be extracted.

For Union Catalog Plus: If you're running Union Catalog Plus, Copies/Titles is the only available data type option. The extracted data will not include any circulation statistics or patron information.

How to extract data

On the Reports main window, select File | Extract Data from the menu. In the dialog, select the data type desired and the range. If you choose to extract Patrons, what appears in the drop-down list depends on what you defined in System Setup. Then click the Browse button and enter or select your destination file name and extension.

Note: We recommend that you use the **.txt** file extension.



When you click Extract, a progress window appears. When the extraction is complete, the Cancel button changes to Close. If you interrupt this process by clicking the Cancel button, no extract file is created.

To include information about the patrons connected to the transactions, check the Extract Patron Data box on the Misc tab of System Setup | Setup | Circulation. This adds patron fields to the Copies/Titles, Copy Transactions, and Category Transactions data files.

Using extracted data

Files in comma-delimited ASCII format can be imported into a number of applications. For instance, if you import the file into a spreadsheet program, you can delete any fields you don't want, and then sort and filter the data to create custom lists and reports.

For example, to use your extracted data in MS Excel, launch Excel and open your data extraction file. When you open a text file, Excel automatically launches a three-step Import Wizard:

1. Set the Original data type to Delimited.
2. Select Comma as the only delimiter for the file.
3. Keep the default column data format of General.

Excel imports the file, placing each field in a column with the field name in the first row:

The screenshot shows an Excel spreadsheet with the following data:

| | A | B | C | D | E | F | G | H | I |
|----|----------------|----------|---------|---------|--|----------|---------------|---------------|--------------|
| 1 | Type | Modifier | Date | Time | Title | LCCN | ISBN | Material Type | Material Age |
| 2 | Checked Out | N/A | 1/19/00 | 8:14AM | How the turtle got its shell : an African tale | 9117526 | | Books | 1990 |
| 3 | Hold Placed | N/A | 2/4/00 | 8:09AM | The Big Dipper and you | 88001501 | 0-688-07191-0 | Books | 1989 |
| 4 | Fine Generated | N/A | 2/4/00 | 8:42AM | Aldo Applesauce | 79016200 | 0-688-22199-8 | Books | 1979 |
| 5 | Fine Generated | N/A | 2/7/00 | 8:14AM | King Leopard's gift, and other legends of the animal | 9001499 | 0-521-3616 | Books | 1990 |
| 6 | Checked Out | N/A | 2/8/00 | 10:23AM | Deep down underground | 88013534 | 0-02-732861-9 | Books | 1989 |
| 7 | Checked Out | N/A | 2/8/00 | 10:23AM | Farmer duck | 91071855 | 1-56402-009-6 | Books | 1992 |
| 8 | Checked Out | N/A | 2/8/00 | 10:23AM | Learning about dragons | 8100474 | 0-516-0653 | Books | 1981 |
| 9 | Checked Out | N/A | 2/8/00 | 11:11AM | Are you computer literate? | 7905639 | 0-918398-2 | Books | 1979 |
| 10 | Checked Out | N/A | 2/8/00 | 11:11AM | Advanced BASIC | 8400739 | 0-531-0484 | Books | 1984 |
| 11 | Checked Out | N/A | 2/8/00 | 11:11AM | The Guinness book of records | 9158588 | 0-8160-277 | Books | 1992 |
| 12 | Checked Out | Reshelf | 2/8/00 | 11:33AM | The adventure of archaeology | 8515275 | 0-87044-60 | Books | 1985 |
| 13 | Checked Out | Reshelf | 2/8/00 | 11:33AM | The adventures of Robin Hood | 8302749 | 0-517-4360 | Books | 1984 |

To edit the extraction file easily ...

... import it into a spreadsheet program.

You can delete, rearrange, sort, and filter the rows or columns. You can run the Find feature to locate specific certain data, or, in combination with Replace, update it.

Examples: To locate patrons with missing or incomplete addresses, extract the Patrons data and filter the address columns for blanks. To determine how many checkouts occur between 3:00 and 4:00, extract the Copy Transaction data and analyze the date and time columns. To see which students are actually reading books in the Geography category, check the Extract Patron Data check box in System Setup, and extract the Category Transaction data.

Using your data in our examples

We have prepared, using MS Excel, a few custom reports to demonstrate some of the many possible ways to analyze your data. These reports consist of a spreadsheet with pre-configured formulas and an interpretive graph. If you have a Windows workstation, you can open these files and import your own data extraction file. To do so, you must have the following:

- Microsoft Excel (version 97 or later) installed
- The FSC Installation disk (version 4.2 or later)
- Your data extraction file and its path and filename

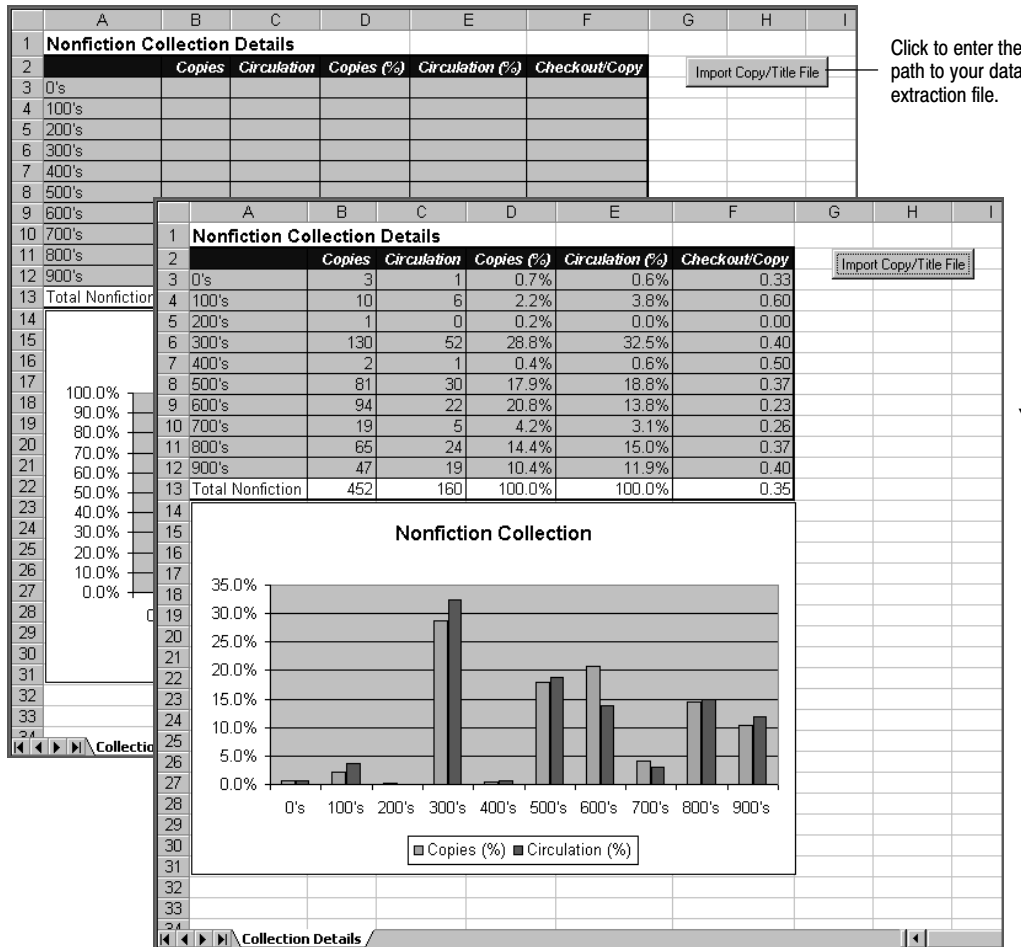
Important: Do not save your data extraction file to the root directory of your hard drive. Place it inside a folder. Make sure the extension is .txt.

Insert the FSC Installation disk into your CD drive. Using Windows Explorer, locate and open the Extras/Samples/Reports/Extract Data folder. Select the desired report (e.g., Collection Details.xls) by double-clicking it. This should launch your MS Excel and open a spreadsheet containing the custom formatting.

On the spreadsheet, locate the button named Import <data type> file. Click the button and enter the path and filename of your data extraction file.

| Use your data extraction file of: | With this spreadsheet file: |
|-----------------------------------|-----------------------------|
| Copies/Titles | NonfictionDetails.xls |
| Copy Transactions | Monthly Transactions.xls |
| Category Transactions | Category Transactions.xls |
| Patrons | Patron Graduation.xls |

When you click OK, your data will be imported, formatted, analyzed, and graphed automatically:



To access these reports easily, copy them to your local workstation. To make additional reports, please see your MS Excel documentation.

The following table contains the names of the fields in the four extraction files:

| Copies/Titles | Copy Transactions | Category Transactions | Patrons |
|------------------------------|--|-------------------------------------|-------------------------|
| (Copy) Barcode | (Transaction) Type | (Transaction) Type | Status |
| Call Number | Modifier* | Modifier* | Barcode |
| Title | Date | Date | ID |
| Author | Time | Time | Last Name |
| LCCN | Title | Category Number | First Name |
| ISBN | LCCN | Category Description | Middle Name |
| ISSN | ISSN | Last Name** | Address Line 1 |
| Material Type | ISSN | First Name** | Address Line 2 |
| Publication Date | Material Type | Middle Name** | City (address line 3) |
| Copy Status | Material Age (pub. date) | Patron Barcode** | State (address line 4) |
| Inventory Status | Barcode | (patron) ID** | Zip/Postal Code |
| Sub location | Call Number | Patron Type Code | Phone Number |
| Acquisition Date | Circulation Type Code | Patron Type Description | Gender |
| Price | Circulation Type Description | Transaction Patron Type Code | Graduation Year |
| Description 1 | Transaction Circulation Type Code | Transaction Patron Type Description | Birth Date |
| Enumeration 1 | Transaction Circulation Type Description | | Card Expiration Date |
| Description 2 | Transaction Call Number | | Location 1 |
| Enumeration 2 | Last Name** | | Location 2 |
| Description 3 | First Name** | | User Field 1 |
| Enumeration 3 | Middle Name** | | User Field 2 |
| Copy Number | Patron Barcode** | | Patron Type Code |
| Funding Source | (Patron) ID** | | Patron Type Description |
| Vendor | Patron Type Code | | (current) Checkouts |
| Circulation Type Code | Patron Type Description | | (current) Overdues |
| Circulation Type Description | Patron Type Code | | (current) Fine Amount |
| Circulation Total | Transaction Patron Type Code | | (current) Refund Amount |
| Year-to-date Statistics | Transaction Patron Type Description | | |
| Last Year's Statistics | Transaction Amount | | |
| Month-to-date statistics | Transaction Balance | | |
| Today's Statistics | | | |
| Member (MOC) | | | |
| Last Name** | | | |
| First Name** | | | |
| Middle Name** | | | |
| Patron Barcode** | | | |
| (Patron) ID** | | | |
| Location 1** | | | |
| Location 2** | | | |
| User Field 1** | | | |
| User Field 2** | | | |
| Graduation Year** | | | |
| Patron Type Code | | | |
| Patron Type Description | | | |
| Due Date | | | |
| Date Checked Out | | | |

* The Modifier field lists any additional information about the transaction: Renewal, Reshelf, Refund Deleted, Fine Deleted, Pending Hold, Pending Reserve, Ready Hold, Ready Reserve, or Reserved.

** These fields are included only if you select the Extract Patron Data option in System Setup | Circulation | Misc.

Notes

Chapter 41 Database maintenance utilities

This chapter contains instructions on how to start Utilities, information on the different functions included in Utilities, tips on when to run them, and what to do if a utility is interrupted. A description of the Registered Products feature and common exception report messages are also included.

About Utilities

Utilities contains a collection of functions designed to diagnose and address problems in the library database. The application divides these utilities into two groups: Maintenance and Advanced.

Maintenance utilities let you diagnose database problems and regenerate selected files. These utilities include the following functions:

- Check Database Integrity
- Rebuild Keywords
- Rebuild MARC Headings
- Rebuild File Indexes

Advanced utilities let you rebuild the entire library database or selected files, or delete the database. These utilities include the following functions:

- Rebuild Database
- Reload File
- Remove Patron History
- Empty Database
- Enable/Disable Data Exchange

When should I run a utility?

If you experience any database related problems with your Follett Software applications, we recommend that you run the Check Database Integrity utility. This Maintenance utility rebuilds the database file indexes and examines the library database. If it encounters any errors, it records them in an exception report along with any suggested solutions. If the utility did not report a problem but the symptoms persist, or if you are uncertain about how to use a utility, call Follett Software's Technical Support department.

Important: Do not run any Advanced utility unless directed to do so by Follett Software Company's Technical Support department or by an exception report generated by another utility.

See also: For more information on when to run a certain utility, see "About the Maintenance utilities" (page 593) or "About the Advanced utilities" (page 598).

What if a utility is interrupted?

If a utility is abnormally interrupted, by power loss or by someone rebooting the computer for example, the next time you try to access any other FSC application, an error message appears. This message directs you to run the interrupted utility before attempting to run any other application. You cannot proceed without running the indicated utility.

If you have any problems running an interrupted utility, please contact Follett Software Company's Technical Support department.

Backing up your library database

In order to protect the library database from corruption or data loss, we strongly recommend that you backup your library database on a regular basis. It's a good idea to keep at least two copies of the most recent backup in a safe place. When you create the backup copies, be careful not to copy over your last backup.

Before running any Advanced or Maintenance utility, you should create a backup copy of the library database.

Important: If you are experiencing any problems with the library database, do not overwrite an existing backup until you have corrected the problem.

See also: For instructions on backing up your database, see Chapter 42, "Backing up your database."

Starting Utilities

Utilities requires exclusive access to the library database. Before you can start Utilities, you must close **all** of the other Follett applications that are running. If you are running WebCollection Plus, Z39.50 Server, or Follett Integration Service (FIS), you may need to stop these services.

Important: If you are part of a union and are participating in data exchange, you must also stop the services for the Follett Data Exchange Server (the Follett Data Exchange Gateway and the Follett Services Manager). Since the Follett Services Manager can be started by a transmission of data from another member of the union, if you can't start your Utilities module, you may need to wait until network traffic subsides. As a last resort, shut down the machine running the Follett Data Exchange Server.

To start Utilities, open the Follett Applications folder on the computer desktop, and double-click the Utilities icon.

Note: You can also access the Follett Applications menu from the Windows Start | Programs menu or from the Mac OS Apple menu.

If you are using the password protection option in System Setup to limit access to Utilities, a password dialog appears. Type the Utilities password (by default **FIXDATA**) and click OK.

See also: For more information about password protection, see "Protecting your Follett applications with passwords" on page 40.

The Utilities main window appears:



From the menu bar, you can access each of the utilities, as well as the help topics.

- File—Contains the command to close Utilities.
- Maintenance—Diagnostic and index rebuilding utilities. For instructions on running these utilities, see “About the Maintenance utilities” on page 593.
- Advanced—Utilities designed to repair database problems. For instructions on running these utilities, see “About the Advanced utilities” on page 598.
- Help—Contains the commands used to access the help topics, glossary, and product information for Utilities. It also contains the Registered Products dialog, which lists the other Follett Software products that are installed on the library computer system (see page 603).

About the Maintenance utilities

From the Utilities Maintenance menu, you can run the Check Database Integrity utility, the Rebuild Keyword utility, the Rebuild MARC Headings utility, or the Rebuild File Indexes utility.

Important: Utilities requires exclusive access to the library database. For more information, see “Starting Utilities” on page 592.

The Maintenance utilities provide you with tools for diagnosing library database problems and rebuilding selected headings and index files.

Important: Depending upon the size of your database and the amount of computer memory available, it may take several hours to run one of the Maintenance utilities. You may wish to run them overnight.

However, if you do run a Maintenance utility overnight, make sure to disable any automatic backup applications. This will help prevent conflicts between the backup application and the utility.

The following table briefly describes each utility and lists some of the reasons for running them:

| Maintenance utility | Description |
|---------------------------------|--|
| Check Database Integrity | Rebuilds the file indexes, examines the library database, and diagnoses any problems it encounters. After the utility is finished, it records all findings and recommendations in an exception report. Use this utility if you experience any database problems or receive any critical error messages. Important: We recommend that you run this utility before using any other Maintenance or Advanced utility. |
| Rebuild Keywords | Empties the keyword index and then regenerates the entire keyword index for the library database. Use this utility if you experience any problems using the keyword search option in OPAC or Cataloging. |
| Rebuild MARC Headings | Re-creates the bibliographic, authority, and copy headings used during database searches. Use this utility if you experience any problems conducting title or copy searches in any Circulation Plus/Catalog Plus application. |
| Rebuild File Indexes | Re-creates the index files used to keep track of the information stored in the library database. |

Check Database Integrity

If you experience any critical error messages in the Circulation Plus or Catalog Plus applications, or if the library computer system freezes, use the Check Database Integrity option to diagnose the problem.

Important: We recommend that you run this utility before any other Maintenance or Advanced utility.

This utility rebuilds the file indexes and checks the database for invalid or corrupted data. If the utility discovers any problems, it records them in an exception report along with any suggested solutions.

To start the Check Database Integrity utility, select Check Database Integrity from the Maintenance menu. A message appears, informing you that this utility may take a long time and asking you to confirm the command. Click Yes to proceed. A progress dialog appears when the process begins. This dialog describes each step of the procedure. When the utility finishes, the Cancel button on the progress dialog changes to Close.

To exit the progress dialog, click Close. An exception report appears, documenting the progress of the Check Database Integrity utility. If the utility encountered any problems during the process, it records them here along with any suggested solutions. Depending on the problem, the exception report may direct you to run another Maintenance or Advanced utility to correct it.

See also: For a list of common exception report messages, see “Interpreting the Utilities exception report” on page 603.



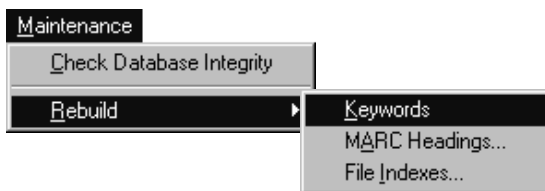
Rebuild Keywords

Each time the Rebuild Keywords utility runs, it empties the keyword index and then rebuilds it for the entire library database. Depending on the size of the library database, this can take a long time to finish. You can save time by using one of the following options to maintain the keyword index during the daily library operations:

- If you want to automatically build keywords when you save new or updated bibliographic records, select the Create Keyword Entries as MARC Records are Saved option from the Cataloging Misc tab in System Setup. For additional information on this option, see page 55.
- If you would rather update the keyword index periodically, use the Update Keywords option in Cataloging. This option lets you build keywords for any new or modified bibliographic records. For additional information on this option, see page 345.

Use the Rebuild Keywords utility if you experience any problems conducting keyword searches with OPAC or Cataloging.

To start the Rebuild Keywords utility, select Rebuild | Keywords from the Maintenance menu.



A message appears, informing you that this utility may take a long time and asking you to confirm the command. Click Yes to proceed. A progress dialog appears when the process begins. This dialog displays each step of the procedure and displays the title of each processed record.

Important: If you interrupt this process, you must run it again or you will only be able to successfully conduct keyword searches on the processed titles.

When the utility finishes, the Cancel button on the progress dialog changes to Close. To exit the dialog, click Close.

Rebuild MARC Headings

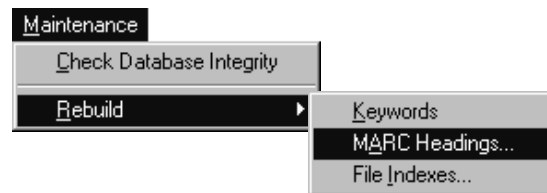
The Rebuild MARC Headings utility re-creates the headings used to locate bibliographic, authority, and copy records during searches. Each heading corresponds to a type of search. The Rebuild MARC Headings utility can rebuild the following headings:

- Title
- Author
- Call Number
- ISBN/ISSN
- LCCN/Control Number
- Category
- Subject
- Series
- Accelerated Reader
- Authority
- Lexile
- Reading Counts

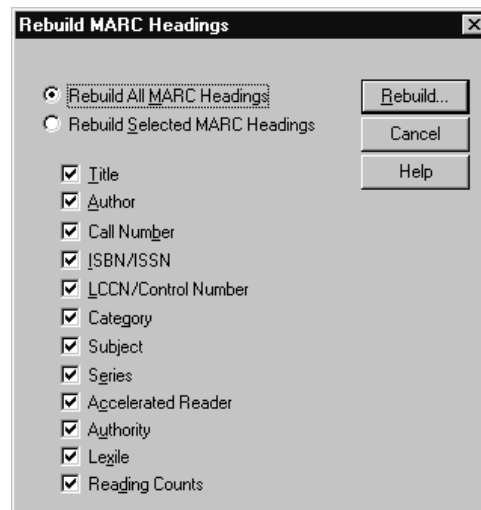
Use this utility if you experience any problems with any of the search options listed above. If the problem only applies to certain types of searches, restrict the rebuild process to the corresponding heading type.

Example: If author information doesn't appear during database searches, limit the MARC headings that the utility will rebuild to the Author headings.

1. To access the Rebuild MARC Headings utility, select Rebuild | MARC Headings from the Maintenance menu.



The Rebuild MARC Headings dialog appears:



2. To rebuild all the headings in the library database, select Rebuild All MARC Headings. If you want to limit the rebuild process to a few areas, choose Rebuild Selected MARC Headings, and select the headings you want.

Important: Once the headings rebuild process begins, you cannot interrupt it.

3. To start the rebuild process, click Rebuild. A message appears, informing you that this utility may take a long time and asking you to confirm the command. Click Yes to proceed. The progress dialog that appears displays each step of the procedure and displays the title of each processed record. When the utility finishes, the Cancel button on the progress dialog changes to Close. To exit the dialog, click Close.

See also: For a list of the MARC tags used to generate bibliographic and authority headings, see Appendix B, “Bibliographic and authority tags.”

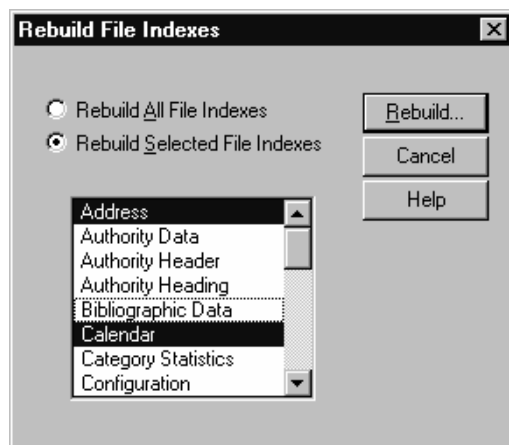
Rebuild File Indexes

The Rebuild File Indexes utility provides a method for recreating the index files used to keep track of information stored in the library database. You can choose specific files to rebuild, or you can recreate all the files in the database.

1. To access the Rebuild File Indexes utility, select Rebuild | File Indexes from the Maintenance menu.



The Rebuild File Indexes dialog appears:



2. If you want to rebuild all the file indexes in the library database, select Rebuild All File Indexes. If you want to restrict the rebuild process to specific

indexes, choose Rebuild Selected File Indexes, and then select the file indexes you want to rebuild.

Important: Once the file index rebuild process begins, you cannot interrupt it.

3. To start the rebuild process, click Rebuild. A message appears, warning that you cannot stop the process once it begins and asking you to confirm the command. Click Yes to proceed. A progress dialog appears, describing each step of the procedure. When the utility finishes, the Cancel button on the progress dialog changes to Close.
4. To exit the dialog, click Close. An exception report appears, documenting the progress of the Rebuild File Indexes utility. If the utility encountered any problems during the process, it records them here along with any suggested solutions. Depending on the problem, the exception report may direct you to run a Maintenance or Advanced utility to correct it or to contact Follett Software Company's Technical Support department.

See also: For a list of common exception report messages, see "Interpreting the Utilities exception report" on page 603.

About the Advanced utilities

The Advanced utilities are designed to correct major problems in the library database. Due to the nature of these utilities, we strongly recommend that you do not run the Advanced utilities unless directed to do so by Follett Software Company's Technical Support department or by an exception report generated by another utility.

Important: Utilities requires exclusive access to the library database. For more information, see "Starting Utilities" on page 592.

Note: Before running any other utility, we recommend that you run the Check Database Integrity utility (see page 594). This Maintenance utility examines the library database for problems. If it encounters any, it records them in an exception report along with any suggested solutions.

The following table briefly describes each Advanced utility:

| Advanced utility | Description |
|-----------------------|--|
| Rebuild Database | Examines the library database and corrects any problems it encounters. It also rebuilds the keyword and cross-reference indexes and MARC headings. |
| Reload File | Copies the selected database file, deletes the original, and then transfers the valid contents of the copy back into the library database. |
| Remove Patron History | Removes the connection between all patrons and the copies they have checked out, incurred a fine on, or placed a hold on. This menu option is only available if the Collect Patron Transaction Histories check box is unchecked in System Setup. |

| Advanced utility | Description |
|--|--|
| Empty Database | Deletes the contents from the library database, including all authority, bibliographic and patron records, copies, keywords, indexes, and setup information. |
| Enable Data Exchange/ Disable Data Exchange | Starts or stops the automatic data exchange between a union and a member. |

Rebuild Database

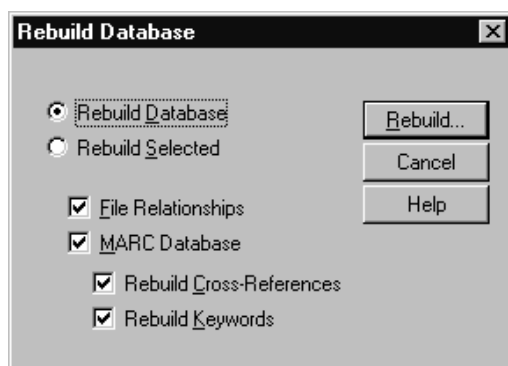
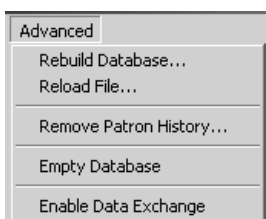
Important: Do not run this utility unless directed to do so by Follett Software Company's Technical Support department or by an exception report generated by another utility, such as Check Database Integrity.

The Rebuild Database utility conducts the same functions as all the Maintenance utilities. It rebuilds the MARC headings and file indexes, examines the database, and checks the required links between the files. In addition, the utility attempts to correct any problems it finds. If it encounters a problem it cannot fix, it records the problem and any suggested solutions in an exception report.

Important: Depending upon the size of your database and the amount of computer memory available, this utility may take several hours to run. We suggest that you run the Rebuild Database utility overnight.

However, if you do run a Rebuild Database utility overnight, make sure to disable any automatic backup applications. This will help prevent conflicts between the backup application and the utility.

1. To start the Rebuild Database utility, select Rebuild Database from the Advanced menu. The Rebuild Database dialog appears:



2. If you want to rebuild the entire library database, select Rebuild Database. If you want to limit the rebuild process, select Rebuild Selected and choose from the following check box options:
 - File Relationships—Deletes and re-creates the indexes, checks the links between related files, and corrects any problems it encounters.

- MARC Database—Deletes and re-creates the indexes and MARC headings, and corrects any problems it encounters. You also have the option of rebuilding the keyword and cross-reference (authority) indexes.

Important: The MARC Database option automatically deletes the keyword and cross-reference indexes. If you select the MARC Database check box but don't rebuild keywords or cross-references, you cannot conduct keyword searches or examine cross-references during database searches. To regain this functionality, you must use Cataloging's Update Keywords option (see page 345), the Rebuild Keywords utility (see page 595), or the Rebuild Cross-References option in Cataloging (see page 346).

3. To rebuild the library database using the options you selected, click Rebuild. A message appears, informing you that this utility may take a long time and asking you to confirm the command. Click Yes to proceed. A progress dialog appears, describing each step of the process. When the utility finishes rebuilding the database, the Cancel button changes to Close.
4. To exit the progress dialog, click Close. An exception report appears, documenting the progress of the Rebuild Database utility. If the utility encountered any problems during the process, it records them in the exception report along with any corrective actions taken by the utility or suggested solutions. Depending on the problem, the exception report may direct you to run a Maintenance or Advanced utility to correct it or to contact Follett Software Company's Technical Support department.

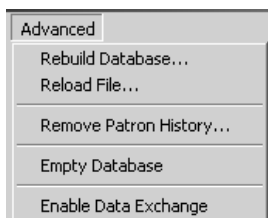
See also: For a list of common exception report messages, see "Interpreting the Utilities exception report" on page 603.

Reload File

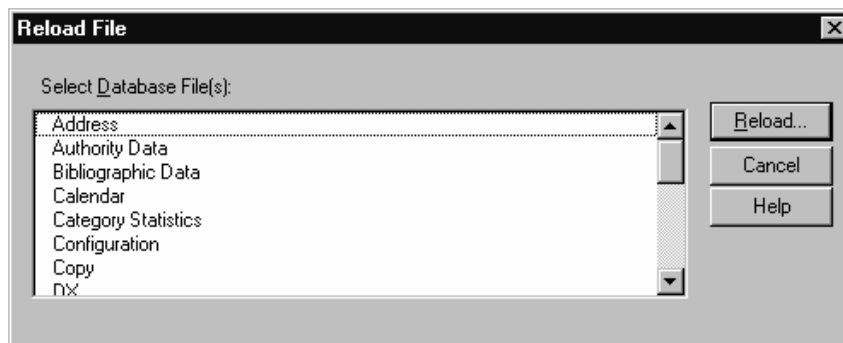
Important: Do not run this utility unless directed to do so by Follett Software Company's Technical Support department or by an exception report generated by another utility.

If your database has corrupted files, Follett Software Company's Technical Support department or an exception report generated by another utility, such as Check Database Integrity, may advise you to use the Reload File utility to clean up the problem. This utility copies the selected database file and then deletes the original. Once it's removed, the utility rebuilds the file and transfers the valid contents of the copy into the new file.

Note: The Reload File utility requires Write access to the TEMP directory. If a message indicates the application cannot access the TEMP directory, verify that the directory exists on the workstation running the Reload File utility and that you have the appropriate rights to the directory. If a message indicates the workstation doesn't have enough available hard drive space, you will need to free up some hard drive space before continuing.



1. To start the Reload File utility, select Reload File from the Advanced menu. The Reload File dialog appears:

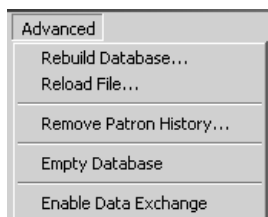


2. From the Select Database Files list, choose the desired files and click Reload. A message appears, informing you that this utility may take a long time and asking you to confirm the command. Click Yes to continue. A progress dialog appears when the process begins, describing each step in the process. When the utility finishes, the Cancel button on the progress dialog changes to Close.
3. To exit the progress dialog, click Close. An exception report appears, documenting the progress of the Reload File utility. If the utility encountered any problems during the process, it records them here along with any suggested solutions. Depending on the problem, the exception report may direct you to run a Maintenance or Advanced utility to correct it.

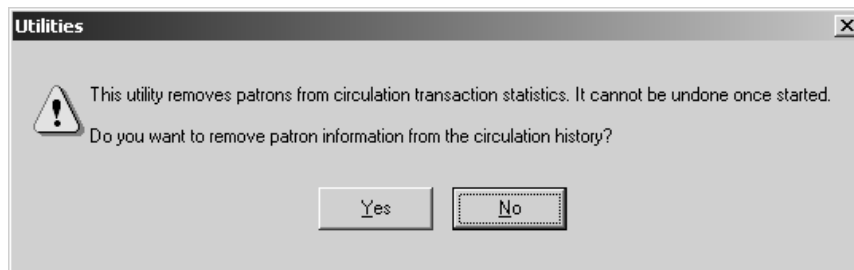
See also: For a list of common exception report messages, see “Interpreting the Utilities exception report” on page 603.

Remove Patron History

Important: If the Collect Patron Transaction Histories check box in System Setup is checked, this menu option is not available.



To remove the connection between all patrons and the copies they have checked out, incurred a fine on, or placed a hold on, select Remove Patron History from the Advanced menu. A message appears:



If you are sure that you want to remove the connection between patrons and their associated copies, click Yes.

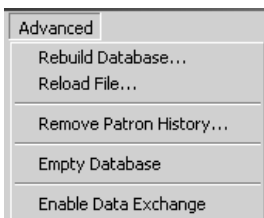
Warning: Performing this operation will remove all patron statistics. Once the Remove Patron History process begins, the changes cannot be undone.

Empty Database

The Empty Database utility erases the entire database, including bibliographic and authority records, copies, keywords, indexes, setup information, and patrons.

Warning: The Empty Database utility deletes all information from the database, including MARC records, copies, and patrons. The deletion cannot be undone.

Important: Do not run this utility unless directed to do so by Follett Software Company's Technical Support department.



To remove the contents from the library database, select Empty Database from the Advanced menu. A message appears, warning you that the process cannot be interrupted and asking you to confirm the command. If you verify the decision to empty the database, a second message appears, asking you to finalize the decision. Click Yes to proceed. A progress dialog appears while the utility empties the library database.

When the utility finishes, the Cancel button on the progress dialog changes to Close. To exit the progress dialog, click Close.

Note: If you are running **Union Catalog Plus**, Empty Database does not delete member configuration information. If you want to delete all configuration information about a member, open System Setup | Member, highlight the desired member, and click Delete.

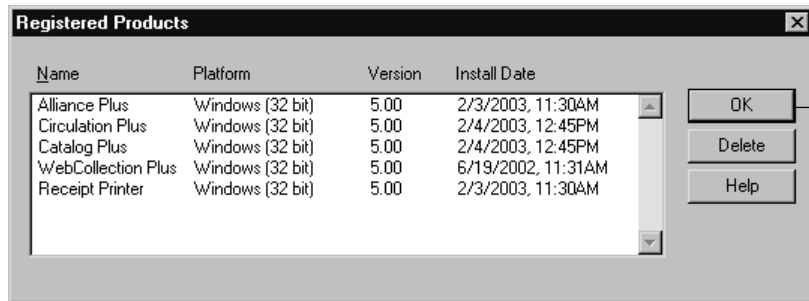
Enable/Disable Data Exchange

Enable/Disable Data Exchange is a toggle switch that starts or stops the automatic data exchange service between a union and a member. This function should only be used in conjunction with the instructions provided by Follett Software Company's Data Services department during a union build.

Important: Do not change this setting unless directed to do so by Follett Software Company's Data Services department.

Viewing your registered products

To view a list of the Follett Software Company products installed on the library computer system, select Registered Products from the Help menu.



Closes the Registered Products dialog

Important: If a product you installed is missing from this list, or if a listed product should *not* be on the list, please call Follett Software Company's Technical Support department. To delete an entry in the list, you'll need a special password.

Interpreting the Utilities exception report

While the utilities are designed to repair problems in the library database, they occasionally discover problems that require additional direction from you. If a utility encounters a problem it cannot repair, it records the event in an exception report. These messages usually include a solution to the specific problem. If you discover such a message, simply follow the instructions. If the problem persists, contact Follett Software Company's Technical Support department. Exception reports reside within your Follett folder.

The following image contains a sample exception report:

```

Check Database Integrity

10/13/2000 @ 01:58 pm

Step 1 of 3 : Rebuild Indexes

    Total Files: 21
    Files Processed: 21

Step 1 of 3 : COMPLETED

Step 2 of 3 : Check MARC In

    File: Authority Data

        Total Records: 0
        Acceptable Records: 0
        Invalid Records: 0

    File: Bibliographic Da

        Acceptable Records: 0
        Invalid Records: 0

    File: MARC Header

        Total Records: 122
        Acceptable Records: 122
        Invalid Records: 0

    File: Synchronization

        Total Records: 0
        Acceptable Records: 0
        Invalid Records: 0

Step 3 of 3 : COMPLETED

IMPORTANT: Problems have been found during processing. To
correct these problems, please run Advanced | Rebuild Data-
base | File Relationships.

```

To ensure the best possible service, we strongly recommend that you keep a log containing a description of any problems you encounter and the date they occurred, as well as the solutions used to correct them.

The following table lists the most common exception report messages:

| Message | Description |
|---|---|
| Problems have been found during processing. To correct these problems, please run <utility>. | To recover from these problems, simply run the utility indicated in the message. |
| Operation failed: (-#) <Error> <Utility> will correct this problem. | This message provides a number and brief description of the problem. To recover from this problem, run the utility indicated in the message. |
| Operation failed: (-#) <Error> Contact Follett Technical Support. | This message provides a number and brief description of the problem. Due to the complexity of this problem, you must call Follett Software Company's Technical Support department for assistance. Important: To ensure quality service, have the error number and description ready before calling Technical Support. |

Chapter 42 Backing up your database

This chapter provides information for developing an effective backup and recovery strategy and instructions for using Follett Software's Backup and Restore application.

Develop a backup strategy

If you ever need to recover from damaged data, you must have a recovery plan in place before the problem occurs. Backing up your data on a regular basis is the simplest and most effective plan for data recovery.

Some reasons for data loss include: disk crash, fire, theft, software or hardware failure, accidental deletions, and power spikes. If any of these happen, you can use your backup to restore your data, eliminating the need to re-enter lost data. In addition to data recovery, the backup can be used for data storage, saving valuable space on the server's hard drive.

How do I back up my database?

To maintain the integrity of your data, it is vital that you use reliable backup software. Manually copying your data files to another media is **not** an effective or safe backup method.

Follett Software's Backup and Restore application, which is included with Circulation Plus and Catalog Plus, lets you back up your library's database, including your records, transactions, configuration, and the setup for your Follett applications. With Backup and Restore, you can back up to a zip disk, floppy disks, or to a secondary hard drive or network drive. Instructions for using Follett Software's Backup and Restore begin on page 607.

Note: If you wish to use other types of media (e.g., CD, tape), additional software may be required. If this is the case, back up to your hard drive, then use the software to transfer the backup file to the media.

Note: This document uses "zip" as a generic term to refer to any 100MB or 250MB diskette or associated drive. Follett Software Company does not recommend any particular brand.

Under certain circumstances you may want or need to use software from a third-party vendor. For example, if you want to back up to a tape device or back up your *entire* system, you will need a third-party solution. Many third-party backup solutions will let you select the type of backup to perform. Generally, you

can choose to back up specific directories and files or all the files and directories on the server. As each vendor uses different terminology to define the backup types, you'll need to refer to the vendor's documentation for definitions and instructions. For information about backing up your Follett applications with third-party software, see the instructions beginning on page 610.

Media rotation

One key element of any data recovery plan is the rotation of your backup media. Whatever type of media you're using, a systematic rotation of your media lets you restore selected files, selected subdirectories, or entire disk/volumes. This saves time and enables you to choose the most accurate and current data to restore. Another advantage of rotating media is cost effectiveness. That is, you won't have to use as many zip disks, floppy diskettes, tapes, etc. The following table suggests a method of rotating six sets of media:

| | Mon. | Tue. | Wed. | Thu. | Fri. | Off-site |
|---------------|----------|----------|----------|----------|--------|----------|
| | Database | Database | Database | Database | System | System |
| Week 1 | Set 1 | Set 2 | Set 3 | Set 4 | Set 5 | (Set 5) |
| Week 2 | Set 1 | Set 2 | Set 3 | Set 4 | Set 6 | (Set 6) |

In the above example, backup your database on Monday with Set 1, use Set 2 on Tuesday, etc. On Friday, run a backup of the system and take that backup off-site. The next week, use Set 6 on Friday, and then take that set off-site and bring Set 5 back for the next Friday's backup.

Note: Follett Software's Backup and Restore will only back up your database files. To back up your entire system, you will need to use a backup solution from a third-party vendor.

Backup tips

For a backup to be an effective part of your data recovery plan, you must back up regularly. The following points are good guidelines to follow, regardless of the backup software you use:

- Label your backups with the day, volume number, type of backup, and current version number of your Follett application, so that, if the need arises, you can quickly decide which backup to restore.
- Rotate your backup media regularly. Since every type of media wears out over time, it's best to always keep one new set on hand.
- Keep your backup media in their protective cases and away from any magnetic fields, power supplies, telephones, monitors, and security systems.
- Store one total backup off-site. Whether at home, office, or somewhere else, off-site storage of backups is the best protection against fire, flood, or theft.

Using Follett Software's Backup and Restore

Follett recommends that you back up your Circulation Plus/Catalog Plus database on a daily basis. This ensures that all daily transactions, configuration, and setup for the Follett applications are preserved should you need to restore.

If you have just upgraded from an earlier version of the application, make sure you perform a backup of your data. You cannot restore a backup created with an earlier version to the new version of the application.

The Backup and Restore application included with your Follett applications can be used to back up your data to floppy disks, zip disks, and secondary hard drives.

Note: If you wish to use other types of media (e.g., CD, tape), additional software may be required. If this is the case, back up to your hard drive, then use the software to transfer the backup file to the media.

Important: For these procedures, you must limit access to the library database. The Backup process requires *restricted* use of the database. Programs that only “read” from the database can be running during a backup:

- OPACs
- Z39.50 Server
- WebCollection Plus services

Programs that can change the data must be stopped:

- All Follett applications (except the “read” applications above): Cataloging, Circulation Desk, Alliance Plus, Inventory, Patron Maintenance, Reports, System Setup, Utilities
- Follett Data Exchange Gateway (for unions)
- Follett Service Manager (for unions)
- Follett Integration Service (FIS)

The Restore process requires *exclusive* use of the database. *All* of the services and applications listed above must be stopped or closed.

To start Backup and Restore, stop or close the applications and services as outlined above. Open the Follett Applications folder on the computer desktop, and double-click the Backup and Restore icon.

Note: You can also access the Follett Applications menu from the Windows Start | Programs menu or from the Mac OS Apple menu.

If you are using a password to limit access to Utilities, a password dialog appears. Since Utilities and Backup and Restore use the same password, type the Utilities password (by default **FIXDATA**) and click OK.

The Backup and Restore main window appears with the Backup tab open, as shown in the following section. From the menu bar, you can close Backup and Restore or access the help topics and product information.

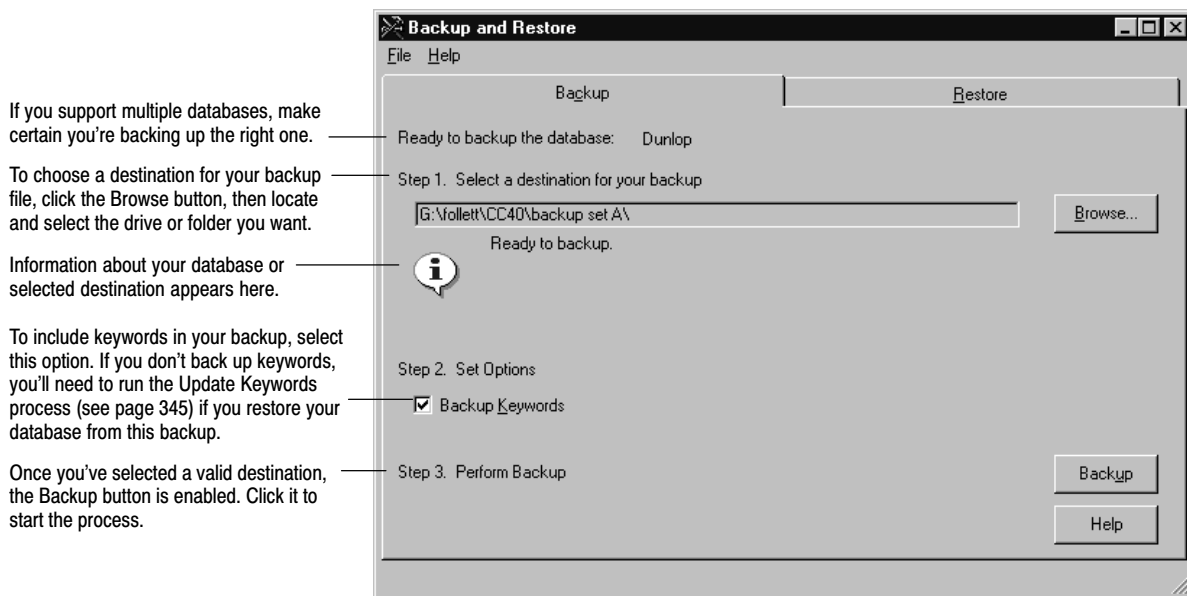
Backing up your database

Before you back up your database, depending on the media you're using, there are one or two things you can do to help the process run smoothly:

- If you're backing up to floppy disks, make certain that you have enough formatted, high-density diskettes on hand. If you're rotating disk sets (see page 606), the backup process lets you overwrite a previous backup file; however, it does not erase any other files on the disks. When reusing a backup set, you should keep the disks in their original order.
- If you're backing up to higher-capacity media (zip disk or secondary hard drive), you may be able to store several backup files on the same device. However, to avoid overwriting an existing backup file, you must save each backup to a different folder.

Note: On Mac OS you can create a new folder on the fly when you select your destination. On Windows you must create the new folder through Windows Explorer or My Computer.

Once you have prepared your backup media, if you haven't already, start Backup and Restore (see page 607). The main window appears with the Backup tab open:



To back up your database, simply follow the steps on the Backup tab.

If there isn't enough room for the backup at your selected destination, a warning appears below the destination field. You can reduce the size of the backup file by clearing the Backup Keywords option. If clearing Backup Keywords isn't sufficient, or if you want to back up your keywords, either make room at the selected destination or choose a new one.

Note: If you selected a floppy drive, space isn't an issue. A message informs you that you'll be prompted as additional floppy disks are needed. Make certain to label and number each disk before you insert it.

When you click Backup, if the application detects another backup file at your selected destination, a message with a description of the existing file appears. If you want to overwrite the existing file, click Yes. If you're rotating disk sets (see page 606), make certain that you don't overwrite your most recent backup.

Unless you used floppy disks, a message appears when the backup is complete, asking if you would like to verify your backup. We recommend that you click Yes. This will ensure that your backup is complete and that it is restorable.

If you are saving your backup files to removable media (zip disk or floppy disks), make certain to label your backup and store it in a safe place.

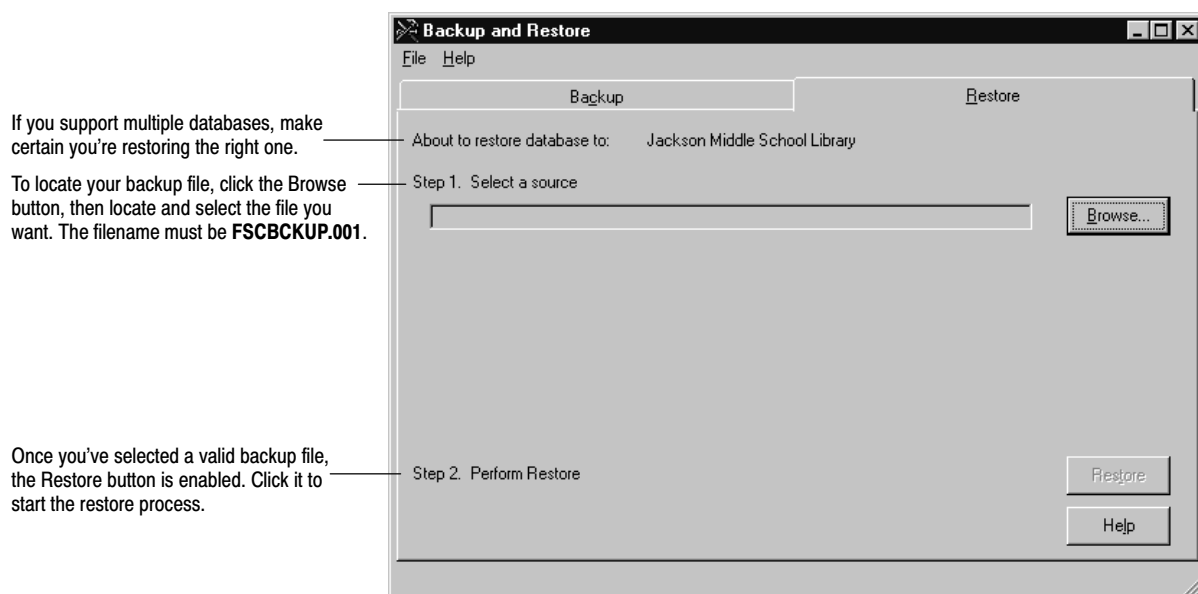
Important: Do not change the backup file name. The restore process requires the backup filename, **FSCBCKUP.001**.

Restoring your database

If you need to restore your database, before you start, make certain that you have the most recent backup on hand. If you backed up to floppy disks, make certain that you have the complete backup set and that they are in order.

Important: The restore process requires exclusive access to the library database. Please make sure that no other Follett programs are running on any library workstation and that Z39.50 Server and WebCollection Plus are stopped.

To restore your database from a backup file, if you haven't already, start Backup and Restore (see page 607), and click the Restore tab:



To restore your database, simply follow the steps on the Restore tab.

The file you select must be named **FSCBCKUP.001**. If the filename is incorrect, or if the backup wasn't created using Follett Software's Backup and Restore, an error message appears. Click OK and locate the correct file.

Note: If you're restoring from floppy disks, insert the first disk of the backup set, and then click Browse and select your floppy drive. You'll be prompted to insert each disk in the set as it's needed.

The application also alerts you if you select a backup file with a site name that is different than the site you're restoring. Click Yes only if you're certain that you want to use the file.

When you click Restore, the application first verifies that the backup file is complete. If you've backed up your database to floppy disks, the application requests each disk in the backup set for verification.

Note: If the backup file is incomplete or otherwise corrupt, a message appears instructing you to use a different backup file.

If verification is successful, you can choose to restore your database or cancel the process. To continue with the restore process, click Yes. If you're restoring from floppy disks, the application prompts you to reinsert the first disk in the backup set. The application displays a progress dialog as it replaces the contents of your database with the information in the backup file.

When the restore is complete, a message appears outlining the tasks you should perform. As a standard measure, we recommend that you run the Check Database Integrity utility (see page 594). These tasks are also listed on the exception report that documents the restore's progress and records any problems it encounters.

Note: If your backup file did not include keywords, you'll have to rebuild them with the Rebuild Keywords utility before you can conduct keyword searches. For more information, see "Rebuild Keywords" on page 595.

Review the exception report carefully. If you notice numerous warnings of corrupted records, you may need to restore from a different backup file. Contact Follett Software's Technical Support department for assistance.

Using another vendor's backup software

If you decide to use backup software from a third-party vendor, Follett recommends backing up the application data in the DATA directory on a daily basis. This ensures that all daily transactions, configuration, and setup for the Follett applications are preserved should you need to restore.

The location of the DATA directory depends on whether your site is a single-user or multiuser environment. When you install the FairCom database server and/or Follett applications, make note of the directory structure so that you will be able to locate the DATA directory. Please keep this information on hand in case you need to contact Follett Technical Support.

Single-user sites

If you are running Follett's single-user applications, back up the DATA and TEMP directories, as well as their subdirectories. These directories are located under CC40.

Important: To back up these directories successfully, you must first make certain that none of the Follett applications are running.

Multuser sites

Sites running Follett's multuser applications should back up the DATA directory and its subdirectories. The default path is FAIRCOM\DATA.

To back up the DATA directory successfully with third-party software, you must do *one* of the following:

- Prior to backup, close all your Follett applications, then stop the FairCom database server as described in the *Installation Guide*.

Note: If you are running Z39.50 Server and/or WebCollection Plus, you must stop them. Once backup is complete and you have restarted the FairCom database server, restart Z39.50 Server and WebCollection Plus to reestablish the connections.

- Or if you do not want to shut down the FairCom database server, you must use backup software that can back up open files. You must also prepare your FairCom database server for backup by running the Backup Prep utility included with the Follett multuser applications. For more information, see the following section, "Preparing the database for backup."

Important: If you are backing up open files, you must be certain that the database is not updated in any way while the backup is in process (i.e., no cataloging, circulation, or other utility activity).

Preparing the database for backup

Before you back up open files, run the Backup Prep utility to help ensure a complete and reliable backup of your database. BKUPPREP.EXE is located in the CC40 or in the WCOMMON folder.

Note: The Backup Prep utility cannot be run on Mac OS.

If you do not have access to the WCOMMON directory, you'll need to copy the necessary files from the Follett Software CD to the machine you'll use to run Backup Prep:

1. On your local network, create a new directory named BKUPPREP.
2. From the EXTRAS\BKUPPREP directory on the CD, copy the entire contents of the folder to the BKUPPREP directory you created.

Running Backup Prep

Backup Prep can either be run manually or included as part of an automated backup script, depending upon your preferences and backup routine.

Manual backup →

If you normally start your database backup manually, run Backup Prep immediately prior to starting the backup:

1. If Backup Prep is located in WCOMMON, from a DOS prompt, go to WCOMMON, type **BKUPPREP**, and then press **ENTER**.

If Backup Prep is located in BKUPPREP, from a DOS prompt, go to BKUPPREP. The command you enter to run Backup Prep depends on the protocol your database server is running:

- TCP/IP: If your FairCom database server runs TCP/IP, type **BKUPPREP -s[FairCom server name]@[IP address] -pTCP/IP** (e.g., **BKUPPREP -sFSCSERVER@127.0.0.1 -pTCP/IP**).
- IPX/SPX: If your FairCom database server runs IPX/SPX, type **BKUPPREP -s[FairCom server name]@[NetWare server name] -pSPX** (e.g., **BKUPPREP -sFSCSERVER@Your_Server_Name -pSPX**).

Important: By default, the FairCom server name is FSCSERVER. The server name is case sensitive; you must enter it exactly as it appears in the FairCom database server's CTSRVR.CFG file.

2. When Backup Prep is complete, a message appears, informing you whether or not the database was successfully prepared for backup.
3. If Backup Prep was successful, continue with your backup.

If Backup Prep could not prepare the database for backup, make sure that the FairCom database server is running, and then try again.

Automated backup →

If your database backup routine is automated, schedule Backup Prep to run before starting backup. Incorporate Backup Prep using the following information:

1. If Backup Prep is located in WCOMMON, set your backup script to run the command line **BKUPPREP -e**.

If Backup Prep is located in BKUPPREP, set your script to run the command line **BKUPPREP -e**, followed by the **-s** and **-p** command line arguments, which are described in detail in step 1 under "Manual backup."

2. After running Backup Prep, have your script check the return code:
 - If the return code is 0, Backup Prep succeeded and backup can start.
 - If the return code is 1, Backup Prep failed and backup should not start.

Restoring from backup

If you're using backup software from a third-party vendor and need to recover from damaged data, you should restore your data backup to its original location. Please refer to your backup software vendor's documentation for instructions.

Important: To perform a successful restore in a multiuser environment, you must first shut down the FairCom database server. For instructions, see the *Installation Guide*.

Appendix A Glossary

| | |
|----------------------------------|---|
| Accelerated Reader | A search that looks for materials belonging to the Accelerated Reader program. You can search for items with a particular reading level, point value, subject, and/or author. |
| access | A method of obtaining electronic resources and programs. |
| active status | A status assigned to patrons who are currently enrolled at a school or to patrons at a public library who have checked out materials in the last two (or whatever designation assigned) years. Opposite of inactive status. |
| Acquisitions | A module accessible through Cataloging and System Setup that allows librarians to set up vendors, funding sources, and default bill-to/ship-to information, making it easier to create orders for new library acquisitions. |
| alias | A name, usually short and easy to type, that is translated into another name or string. Many times used for commands. |
| Alliance A/V ACCESS | A CD-ROM database containing bibliographic records for audio-visual materials for use with the Alliance Plus software. |
| Alliance Plus | <ol style="list-style-type: none"> 1. A Follett Software Company application that lets you add or enhance bibliographic records in the library database with bibliographic records from a CD-ROM or online database. 2. A CD-ROM database containing bibliographic records for titles published after 1970. Follett Software Company releases a single Alliance Plus CD-ROM biannually. |
| Alliance Plus Data Source | Any media or electronic source, such as Alliance Plus Online, CD-ROMs, or union databases, that contains searchable records. |
| Alliance Plus Online | A Follett Software Company online subscription that lets you add or enhance bibliographic records in the library database with bibliographic records from the Alliance Plus Online database. This database is updated weekly and contains over three million records. |
| Alliance Vintage | A CD-ROM database containing bibliographic records for pre-1970 materials. |
| alphanumeric | The letters, numbers, and symbols used for data entry. |
| ASCII | American Standard Code for Information Interchange. The dominant character code used for communication between computers. In ASCII, each number represents an alphanumeric character or common keyboard symbol. |
| authority record | A record of the authoritative form of a name (personal, corporate, meeting, or geographic), uniform title, series title, or topical term used as a heading in a library catalog. The authority file governs the application of headings to new items as they are added to the library collection. An authority record may also contain "See from" and "See also from" references. |

| | |
|-------------------------------|--|
| autorecon | The automated process used to enhance the bibliographic records in the library database with information from an Alliance Plus CD-ROM or Alliance Plus Online database. Autorecon is an abbreviated term for Automated Retrospective Conversion. |
| available | A copy status that indicates a copy is on the shelf and available for checkout. <i>See Also</i> copy status. |
| Bar Tender | Third-party barcode-creation software product that works in concert with Follett Software products. |
| barcode | A printed identification code composed of black and white lines that are machine-readable. In Circulation Plus and Catalog Plus, barcodes identify patrons and copies. |
| barcode number | The combination of letters and numbers that represent the same identity as a scanned barcode. |
| barcode symbology | The structural rules and conventions for representing data within a particular barcode, such as Code 39, Codabar, or Labelcode 4. |
| barcode scanner | A device which, when passed over a barcode, reads the black and white lines and translates them into letters and numbers so the computer can read them. |
| baud | The unit in which the signalling rate of a communication channel is measured. 1 baud is 1 symbol per second. |
| bibliographic record | The MARC record for each title in your collection. For each title, you create one bibliographic record. Each bibliographic record can have multiple copy records if your library has more than one copy of a title. |
| bibliographic template | Cataloging's bibliographic templates contain the tag, subfield, and indicator text fields frequently used for creating MARC bibliographic records for the commonly cataloged material types. |
| block condition | A warning message that interrupts a circulation transaction. These messages must be acknowledged before proceeding with a transaction. Block conditions usually indicate the transaction should not be allowed to proceed. |
| Boolean operators | Terms that express a logical relationship between keywords or phrases. The Power search in OPAC and WebCollection Plus uses AND, OR, and BUT NOT. |
| brief record | A bibliographic record with only minimal cataloging information (title, author, and local call number). |
| Catalog Plus | An integrated software product that automates library cataloging functions. Catalog Plus consists of the following: <ul style="list-style-type: none"> • Cataloging • Reports • Utilities • System Setup • OPAC |
| Cataloging | A Follett Software module that allows users to create, update, delete, import, and export MARC bibliographic records and copy records. |
| category | The user-defined name assigned to a group within your collection. Categories allow copies to be grouped together for listings and statistical purposes. |
| checkin | The transaction that occurs when a patron returns a checked-out copy. When a copy is checked in, the copy record status changes from checked out to available. |
| checkout | The transaction that occurs when a patron takes a copy out of the library. When a copy is checked out, the copy record status changes from available to checked out. |

| | |
|------------------------------|---|
| Circulation Desk | The Circulation Desk module automates all tasks that would normally occur at the library's circulation desk, such as checkins, checkouts, creating fines, and placing copies on hold or reserve. |
| circulation limits | A general term referring to both the loan periods for the various circulation types and the patron limits for the various patron types. Circulation limits are usually based on existing library circulation policies. |
| Circulation Plus | An integrated software product that automates library circulation functions. Circulation Plus consists of the following modules: <ul style="list-style-type: none">• Circulation Desk• Cataloging• Patron Maintenance• Utilities• Inventory• System Setup• Reports |
| Circulation Setup | A function within System Setup that allows the librarian to set up library policy electronically so that transactions performed using the Circulation Desk module conform with existing library policies. |
| circulation type | A copy's circulation type, when combined with a patron type, determines the loan period of the copy. |
| classification system | A scheme for arranging books and other materials according to subject or form. The most common ones are the Dewey Decimal Classification and the Library of Congress Classification. |
| client/server | A multiuser configuration in which two or more computers on a network divide the responsibilities for communicating and responding to requests made by the library staff and patrons. The client software runs on the desktop of the library workstation and acts as the interface used by the staff and patrons. The database server, running on another computer, manages the library database. It receives requests from the clients, locates the desired information, and sends the results back to the client workstation. |
| client software | <i>See</i> network client. |
| collection database | A library's MARC record and copy database. |
| combo box | A type of control box. Combo boxes allow the user to either choose or enter information needed to proceed with a task. |
| compression | A means of compacting data to save storage space or transmission time. Generally used for backup procedures. Although data is already coded in digital form for processing, it can often be coded more efficiently (using fewer bits). For example, run-length encoding replaces strings of repeated characters with a single character and a count. Compressed data must be decompressed before it can be used. |
| control number | An alphanumeric entry in the 001 tag of a MARC record that is a unique identifier for that bibliographic record. |
| copy | An individual item in your collection, such as a book, CD, or video. |
| copy barcode | A barcode that identifies an individual copy item in your collection. |
| copy record | The data about an individual copy item in your collection stored in your database. |

| | |
|---------------------------|---|
| copy status | <p>The copy status indicates the assigned designation of a copy. The possible copy statuses are:</p> <ul style="list-style-type: none"> • Available • Lost • Checked out • On hold • At the bindery • Missing • Loaned out <p>The copy status can be changed from the Edit Copy dialog in Cataloging.</p> |
| counters | An internal log in the application used to determine a physical count, such as monthly and yearly circulation counters. |
| daily startup | A group of tasks performed by Circulation Desk at the beginning of each new day of circulation. The results of these tasks sometimes produce exception reports to alert librarians of certain conditions, such as a hold expiring or being deleted. |
| data | Information stored in a field in a record in a file. |
| data extraction | The process of copying certain data from the database to a comma-delimited ASCII file. The data can then be further processed by another application. |
| data source | Any media or electronic source, such as Alliance Plus Online, CDs, or union databases, that contains searchable records. |
| database | <p>A general term referring to a collection of data stored in one or more files. Entries within a database are usually called records that contain fields that contain data.</p> <p><i>Example:</i> Within the patron database, there will be a record for each patron. Individual patron records contain fields that specify the patron's home address, alternate address, patron type, etc.</p> |
| database integrity | A term used most often in records management to indicate that all relevant records are filed correctly. |
| database server | <ol style="list-style-type: none"> 1. A computer on a network where data files are stored. 2. A software application that manages the flow of data files on the network. |
| DCOM | Distributed Component Object Model. A packet transfer schema that uses globally unique names to transfer data across a network. Employed by several Follett services, including Follett Data Exchange Server. |
| dedicated server | A computer not used for a workstation. |
| default | A value that the application uses if you do not enter an alternate choice. |
| deleted hold | A hold that has been purged from the hold queue and can no longer be revived. |
| diacritics | Special marks used above and below letters to indicate a special phonetic condition. Diacritics generally appear in words adopted by English from another language or in words in a foreign language. |
| diagnostics | In Utilities, the user can run Check Database Integrity to analyze the database for invalid or corrupted data. |
| dial-up networking | A method of connecting to a network over a telephone line using a modem. |
| digital resource | See electronic resource. |
| direct access | A method of connecting to an electronic resource residing on a tangible (touchable) carrier; e.g., floppy disk or CD. The connection requires a computer. |
| drop-down list | A selection list, on a dialog, that is hidden until a button is clicked. |

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| duplicate copy | See Replicate copy. |
| DX | See Union Data Exchange. |
| dynamic IP address | An IP address that changes each time the computer connects to the Internet. Dynamic IP addresses are useful if your library uses dial-up networking to access the Internet. See Also IP address. |
| Easy Editor | One of the two data entry windows in Cataloging, used to add, edit, or delete MARC records. See also MARC Editor. |
| eBook | An electronic version of a printed book. |
| ejournal | An electronic version of a printed journal or other serial publication. |
| electronic access | A method of connecting to an electronic resource residing on a computer, either locally or on the Internet. Information entered in the 856 tag (an access method and an address - the how and the where) provides access to an electronic resource. Clicking the hyper-linked 856 in OPAC or WebCollection Plus causes the browser to display the resource. |
| electronic resource | A source of information in a digital format, rather than on paper or another medium, accessed by means of a computer, either locally or remotely. Computer programs, games, online services, eBooks, and Web pages are all examples of electronic resources. |
| ellipsis | An ellipsis (...) after a menu item means that, after the user chooses an item, the system prompts the user for additional information before the operation is carried out. |
| exception report | An exception report lists items that were not processed correctly for some reason, or were deleted. Use printed exception reports to review the results of a batch process. |
| expired hold | A hold for which the expiration date has passed. An expired hold cannot become pending or ready until its expiration date is extended. |
| export | The process of transferring bibliographic and copy, authority, or patron records from the current database to a file for transfer to another system. |
| extraction | The process of copying certain data from the database to a comma-delimited ASCII text file. The data can then be transferred to another application. |
| field | A section of a record which contains specific data. <i>Example:</i> A field in a copy record could be a barcode number or a copy price. |
| file | Any organized collection of data, documents, or records. |
| file server | 1. A computer on a network in which all shared applications are stored. 2. A software application that monitors and controls the flow of information on a network (e.g., Windows NT/2000, AppleShare, and Novell NetWare). |
| Find Headings | An option in both the Easy and MARC Editors that allows users to quickly search previously-cataloged author, subject, or series headings. |
| Find-It-All Collection | A collection of subscription-based modules that enable patrons to find, evaluate, and use all types of information resources available over the Internet. |
| Find-It-All Knowledge Links | A Find-It-All Collection module that provides access to over 160,000 safe, high-quality, Web sites aligned to both state and national standards (State Standards available Spring 2002). (This is a Follett subscription-only service.) |
| Find-It-All One Search | A Find-It-All Collection module that allows patrons to search multiple information sources such as the library collection, full-text databases, and online encyclopedias, all at once, from one common interface, returning a combined results list. (This is a Follett subscription-only service.) |

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| fine | Fines are generated by Circulation Plus when a patron does not return a copy on time (overdue fine), when a patron reports a lost copy (lost fine), or when a returned copy shows signs of damage (damaged fine). A fine type of refund allows librarians to track money owed back to a patron for payments made on lost items that have been returned. The librarian can create additional fine types as needed; however, user-defined fine types are not associated with copies |
| fine increment | The amount of fine penalty that accumulates each day, or other specified time period, and is applied to a patron record. |
| fine limit | The maximum fine for a damaged, lost, or overdue copy. |
| fine threshold | The maximum amount a patron can accumulate in fines before Circulation Desk notifies the librarian. For example, if you want Circulation Desk to notify you whenever a patron with a fine penalty attempts a transaction, set the threshold to zero. |
| fine type | There are four default fine types available in Circulation Plus: Overdue, Damaged, Lost, and Refund. Additional types can be created in System Setup. <i>See Also</i> fines. |
| firewall | A combination of hardware and software used to protect the library network from unauthorized access. |
| fixed field | Some 00X fields in MARC bibliographic records are called fixed fields because they contain a fixed number of character positions which can only be filled by selecting certain defined characters. |
| fixed-length tag | |
| Follett Classic | Any barcode consisting of seven or fewer characters, regardless of the barcode symbology, with type identifier of P, T, or X preceding the number. |
| full record | A bibliographic record that includes title, author, publisher, physical description, call number, subject, series, and notes fields. |
| heading | The name of a person, corporate body, geographic location, title proper of a work, or an authorized content descriptor, used as an access point in a catalog. |
| hold | A request by a patron for an item that is not currently available. <i>See also</i> Reserve. |
| hold priority | A number that represents the ranking of a hold in the hold queue. The lower the priority number, the higher a hold's position in the hold queue. You can edit the hold priority for each patron type in System Setup. |
| hold queue | A list of patrons who have placed a hold or reserve on a title. |
| hold status | There are three hold statuses that appear when viewing the hold queue: <ul style="list-style-type: none">• Ready—the copy is ready for the patron• Pending—the copy will become ready when it is returned• Expired—the hold expiration date has passed |
| holdable | Indicates the copy can have a hold placed on it. |
| holdings | The materials in the library's collection. |
| holdings code | The identification code used to uniquely identify an individual library. <i>See</i> MOC. |
| home page | The main screen of a hypertext document on a Web site. All other pages on a Web site are usually accessible by following links from the home page. A subset of Web pages. |
| HTML | HyperText Markup Language. The standard language for describing the format and structure of pages on the Web. |

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| HTTP | HyperText Transport Protocol. The Internet protocol that allows Web browsers to retrieve information from servers. |
| hyperlink | An image or highlighted text (reference) in a document used to jump to another place (target) in a document. |
| ID number | A unique user-defined number that identifies a patron, such as a student identification number, social security number, locker number, etc. |
| IIS | Internet Information Server. Microsoft's Internet (Web) server based on the Windows NT/2000 Server. |
| illegal holds | Attempted holds on copies that are not available because they have a copy status of lost or missing or have a circulation type of *NC. |
| import | The process of moving bibliographic and copy, patron, or authority records from a file to the current database. |
| inactive copies | Valid copy barcodes that are not presently used in your system. |
| inactive status | A status assigned to students who are not currently enrolled but who may return. Also applies to patrons at a public library who have not checked out materials in the last two (or whatever designation assigned) years but are likely to do so again. This status triggers a block message. Opposite of active status. |
| indicator | A one-character field in a MARC record used to express a condition. MARC records allow for the use of one or two indicators for each tag which are distinguished by their positions in the record (that is, first position and second position); e.g., the number of nonfiling characters in a title is entered in the second indicator of the 245 tag. |
| installation | The process of loading an application onto a computer. |
| interest levels | A search limiter that lets you reduce the search results to bibliographic records that have the first indicator in the 521 tag set to 2, and contain one of the following standard interest levels in subfield _a: <ul style="list-style-type: none">• Preschool• K-3• 3-6• All Juvenile• 5-8• 7-10• All Secondary• All Grades• Young Adult• Adult• Professional |
| Internet | An international network comprising thousands of smaller networks. Computers attached to the Internet use the TCP/IP protocol to communicate. |
| invalid copies | Copy barcodes that do not match your current barcode symbology. |
| Inventory | A Circulation Plus module that is used to begin, conduct, and finalize an inventory. You can also reset missing copies from the Inventory module. |
| inventory statistics | The resulting counts from conducting an inventory. |
| inventory status | Circulation Plus uses three inventory statuses to track inventory: <ul style="list-style-type: none">• Marked—the copy has been inventoried• Unmarked—the copy has not been inventoried• Missing—at the time the last inventory was finalized, the copy had not been marked |

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| IP address | Internet Protocol address. An IP address is analogous to a postal address. It identifies the location of a computer or device on a network running TCP/IP. An IP address consists of twelve numbers divided into four sets of three. <i>Example:</i> 192.168.213.120 |
| IPX/SPX | Internetwork Packet Exchange/Sequence Packet Exchange. A protocol used for communication and file transfer between workstations. SPX is a transport layer protocol. |
| ISBN | International Standard Book Number. A 10-digit number that identifies an edition of a work issued by a particular publisher. Entered in the 020 tag of the MARC record. |
| ISP | Internet Service Provider. |
| ISSN | International Standard Serial Number. An 8-digit number that, along with the key title, uniquely identifies a serial publication. Entered in the 022 tag of the MARC record. |
| keyword search | A search method using keywords or phrases that also supports wildcards. |
| keywords | Words recognized by the online public access catalogs (OPACs) during keyword searches. The list includes all significant words or phrases found in the title, author, notes, subjects, and series fields of the bibliographic record. |
| LAN | Local Area Network. A computer network that spans a relatively small area. |
| LCCN | Library of Congress Control Number. An 8- or 12-digit number that uniquely identifies the item cataloged. Entered in the 010 tag of the MARC record. |
| library calendar | An area within System Setup. Before the Circulation Desk module can be used to automate transactions effectively, the librarian must define the open and closed days for the library (library calendar) in System Setup. |
| limiters | Search settings that allow the user to control the scope of their search results by selecting specific ranges from established categories. Follett applications support the following limiters: <ul style="list-style-type: none"> • Interest level • Publishing year • Material type • Reading level |
| loan period type | Loan period types are assigned according to patron type and circulation type. There are three loan period types available in Circulation Plus: <ul style="list-style-type: none"> • Daily—the loan period units are in days • Hourly—the loan period units are in hours • Fixed—copies are due on an assigned date |
| local access | <i>See</i> direct access. |
| locatable copy | A copy with a copy record status of available, checked out, loaned to another library, at the bindery, or on hold. |
| main entry | The primary access point for a bibliographic record, usually the author entry. |
| MARC | MAchine Readable Cataloging. A set of standards developed by the Library of Congress for identifying, storing, and communicating cataloging information. |
| MARC 21 | The name of the harmonized USMARC and CAN/MARC formats, adopted in 1999. |
| MARC bibliographic record | <i>See</i> bibliographic record. |
| MARC data | The computerized information stored in a bibliographic database record. |

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| MARC Editor | One of the two data entry windows in Cataloging, used to add, edit, or delete MARC records. <i>See also</i> Easy Editor. |
| MARC Magician | A separately-purchased application that corrects control field errors, punctuation, and indicators, and allows you to perform global editing. |
| material | Physical entities that carry intellectual property (for example, books, graphics, audio recordings, machine-readable data files). |
| material type | <ol style="list-style-type: none">1. Refers to the physical type of an item, such as book or video, not the physical description (300 tag), represented by a material-type icon in the Follett applications.2. A search limiter that lets you narrow the search results to bibliographic records that match a particular material type. |
| menu | A list of options available to the user of an application. Clicking on the menu title causes the list to appear. Clicking on an entry in the list causes the computer to perform that operation. |
| menu bar | The menu bar extends across the top of the window and displays the title of each available menu. Even when the window changes, the menu bar is always visible at the top of the window. |
| MOC | An acronym for MARC Organization Code. Also known as a holdings code, used to uniquely identify an individual library, assigned by the Library of Congress. |
| modem | An electronic device for converting between serial data from a computer and an audio signal for transmission over telephone lines. |
| modem port | The modem connection port, typically on the back of a computer, identified usually by a small telephone handset icon. |
| module | A software component that interacts with other modules in a larger system. Examples in Follett Software applications are Cataloging, Circulation Desk, and Utilities. |
| monograph | A bibliographic item in one part, or a finite number of parts (as opposed to a serial). |
| mount | The act of making an external directory structure, such as a CD-ROM database, available to a local computer system. |
| multiuser environment | A network consisting of a server or servers and workstations. Typically the applications are stored on a file server and are licensed for multiple users at the workstations. |
| NetWare | A registered trademark of Novell, Inc., a manufacturer of networking software. |
| network | Two or more computers connected by cable or wire having the ability to communicate with each other. |
| network client | In a client/server environment, the network client runs on the workstation and supports communication with a server. The client used by your library depends on the network operating system used to support the FairCom database server. <i>See the Installation Guide</i> for more information. |
| NLM | NetWare Loadable Module. A term used to identify utilities that are loaded into the NetWare server's memory (either automatically by the operating system or manually with the LOAD command) and reside there until unloaded either by rebooting or using the UNLOAD command. |
| nonfiling characters | The number of characters you want the computer to skip when indexing a title. <i>Example:</i> If you want the title <i>The Outsiders</i> listed under "Outsiders," you would type the value 4 in the appropriate indicator which represents the number of nonfiling characters plus the space after the article. |
| non-Follett Classic | Any barcode of 8 or more characters without a P, T, or X preceding the number. |

nonholdable copies See illegal holds.

Novell A registered trademark of Novell, Inc., a manufacturer of networking software.

ODBC Abbreviation of Open DataBase Connectivity, a standard database access method developed by Microsoft Corporation. The goal of ODBC is to make it possible to access any data from any application, regardless of the database management system (DBMS) handling the data. ODBC works by inserting a middle layer, called a database driver, between an application and the DBMS. The purpose of this layer is to translate the application's data queries into commands that the DBMS understands. For this to work, both the application and the DBMS must be ODBC-compliant; that is, the application must be capable of issuing ODBC commands, and the DBMS must be capable of responding to them.

on-demand data sharing Accessed through Selected Database Sources in Cataloging, it lets DX members search for, and save down, MARC records in the union catalog database. The Follett Data Exchange Server provides the communication link.

OPAC An Online Public Access Catalog. A computer application for locating materials in a library. Used by patrons to search the library's database from a search station. OPACs have replaced card-based catalogs in many libraries.

path The route to a file through a file system.
The portion of a URL that identifies the location of a folder containing file. Typically preceded by a single forward slash (/).

parallel port See printer port.

partnering When a union catalog and member site share updated MARC and copy information through Follett Data Exchange Server.

patron barcode A barcode used to identify your individual patrons.

Patron Maintenance A Follett Software module in Circulation Plus that allows the user to create, import, export, update, and delete patron records.

patron type A grouping designation given to like patrons. Patron Maintenance comes with two default types: Student and Faculty. You can create as many patron types as you need; e.g., Aide, Student Volunteer, Juniors, Seniors.

pending hold After a patron places a hold, the hold remains pending until the item is returned. When the item is returned, the pending hold becomes a ready hold.

peripheral A computer accessory used for input and/or output operations; e.g., CD-ROM drive.

PHD Portable Handheld Device. A barcode scanner that collects, stores, and transmits data. You can use a PHD to simplify certain circulation, cataloging, inventory, and reporting activities. Circulation Plus and Catalog Plus currently support four PHD models: PHD+, PHD+ II, PHD Laser+, and the PHD Dolphin+.

phrase A combination of words used in a keyword search that appear near one another in the searchable fields of a title record. The words that make up a phrase can be separated by a single space or stop word or words. *Example:* President of the United States.

physical description A term referring to the 300 tag in a MARC record. This tag contains information on the item's dimensions and other physical details.

physical carrier A tangible medium on which electronic data or resources are stored; e.g., floppy disk.

Power search A keyword search in Cataloging, OPAC, and WebCollection Plus that uses up to three words or phrases, and can include wildcard characters, Boolean operators, and the selection of search fields to narrow or expand a search.

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| primary address | The address that appears on bills and notices which are to be mailed home. This address appears on the Addresses dialog box in Patron Maintenance. |
| printer port | The connection port, typically located on the back of a computer, indicated usually by a small printer icon and used for connecting a printer or other devices. The printer port is sometimes referred to as the parallel port. |
| process misses | The manual process used to enhance the bibliographic records in the library database with information from an Alliance Plus CD-ROM or the Alliance Plus Online database. Use process misses to enhance bibliographic records that were not matched during an autorecon. |
| progress window | A window that displays a list of data being processed or a list of the current status of an ongoing process. |
| proof sheet | A printed copy of a bibliographic record, available in Cataloging. |
| protocol | A set of rules governing communications between computers. The most common protocol is HTTP. |
| publishing year | A search limiter that lets you reduce the search results to titles published within a selected range of years. |
| reading level | A search limiter that lets you narrow the search results to titles with the first indicator of the 521 tag set to 0 and a value between 0.0 and 20.0 in subfield <i>_a</i> . |
| Reading Program | A search that looks for materials belonging to a reading program. You can search for items with a particular reading level, point value, subject, and/or author. |
| ready hold | A hold that is available to be picked up by the patron. |
| Rebuild File Indexes | A utility that restores specific index files that may be corrupted. |
| Reindex Database | A MARC utility option that rebuilds specific MARC record index files that may be corrupted. |
| Reload | This is an option in Follett Data Exchange Server that allows a member site to reload its participation information at the union after restoring from a tape backup. |
| remote access | A method of connecting to an electronic resource residing on another computer, either on a local network or on the Internet. |
| Remote Circulation | A Circulation Desk option that allows the librarian to process checkout and checkin transaction data that has been collected with a PHD. |
| Replicate copy | A Cataloging option that allows the librarian to duplicate existing copy information for a new copy. |
| Reports | An application module for generating reports. Reports are divided into two categories: <ul style="list-style-type: none">• Circulation reports• Cataloging reports |
| reserve | A hold request placed for an item needed on a specific future date. <i>See also</i> hold. |
| reserve shelf | A physical place in the library where ready holds and reserves are placed until patrons claim them. Also called the hold shelf. |
| restricted | Although user-defined, restricted status typically means that a patron's library privileges are limited in some way. Patrons who violate library policies may have restricted status. |
| retrospective conversion (recon) | A process in which brief bibliographic records are converted into full MARC records. |

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| scanner | See barcode scanner. |
| search types | There are fifteen search indexes available for finding titles in Cataloging: <ul style="list-style-type: none"> • Title • NBN • Category • Barcode • Author • Subject • Power • Lexile Measure • ISBN/ISSN • Series • Keyword • Reading Counts! • LCCN • Call Number • Accelerated Reader <p>The on-line public access catalogs provide eleven different searches:</p> <ul style="list-style-type: none"> • Title • Series • Power • Lexile Measure • Author • Call Number • Keyword • Reading Counts! • Subject • Category • Accelerated Reader |
| searchable fields | Areas of the library database searched during a keyword search. OPAC allows you to search all fields during a Power search or to limit your search to the titles, authors, notes, subjects, or series fields. |
| secondary address | The alternate or supplemental mailing address defined for patrons in Patron Maintenance. |
| selection list | A list of entries from the library database. This list contains the closest matches to the information entered during a search. Also called a hitlist. |
| serial | Any publication (periodicals, newspapers, annuals, journals, numbered monographic series) issued in successive parts and bearing numerical or chronological descriptions. |
| serial port | A connector on a computer to which you can attach a serial line connected to a peripheral (such as a PHD) that communicates using a serial protocol. Also called a com port. See also modem port. |
| series | Separate, independent works, usually related by subject, issued at different times under a collective title. For example, <i>The Rivers of America</i> series. |
| server | A general term referring to either a file or database server, in general, or the FairCom database server, in particular. |
| set up | To enter the information that will be used by the computer to process other entries. |
| shortcut | A symbolic link, typically a desktop icon, that can be clicked to launch an application. Used instead of typing in a string path or opening a tree. |
| single-user environment | A non-network environment. All applications and databases are stored on the same computer. No files are shared with other computers. |
| Site Setup | A function within System Setup that allows the user to enter the library's identification, fiscal information, password security, and barcode symbologies for patrons and library materials. |
| SMTP | Simple Mail Transfer Protocol. protocol used to transfer electronic mail between computers. It is a server-to-server protocol; other protocols are used to access the messages. |
| software update | Minor enhancements added to an existing software product. |
| software upgrade | New features added to an existing software product. |
| sorting | The computer's process of arranging the requested data in the order specified. |
| sounds like | A type of search used in Patron Maintenance based on the sound of a name, not the spelling. |

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| special due date | An option in the Circulation Desk module that allows the librarian to assign a non-standard due date to copies on checkout to a patron. |
| SQL | Abbreviation of Structured Query Language, and pronounced either see-kwell or as separate letters. SQL is a standardized query language for requesting information from a database. |
| stop words | Words that are ignored during a keyword search. Stop words are generally leading articles, conjunctions, or prepositions. |
| subfield | A portion of a MARC tag (field) containing data. |
| tag | An element (field) of a bibliographic record. It may contain subfields. |
| tag number | A three-digit number used to identify a MARC record field. |
| TCP/IP protocol | Transmission Control Protocol/Internet Protocol. This is the standard protocol for communications and file transfer over many networks, including the Internet. |
| template | A predefined form used as a guide for entering data. |
| temporary record | A title (and copy) that will retain its status for a limited amount of time. Created “on the fly” at the Circulation Desk when no permanent record exists for the item. Once the item is returned and there is no fine or hold, the title (and copy) are deleted from the database automatically. |
| text file | A file that contains only text or ASCII characters. Saving files as text-only allows these files to be used by a variety of programs and computers. |
| title record | The bibliographic record for a particular item in the collection. There is only one title record, but it can have many copy records connected to it. |
| transaction | A transaction is an event occurring between a patron and an item in the collection; e.g., checking out, checking in, placing a hold, or paying a fine. |
| type identifier | A single character in a barcode that indicates that the barcode is either a patron barcode or a book barcode. Traditionally, a P in position 1 identifies a patron barcode, and a T in position 1 identifies a book (title) barcode. It can be either alpha or numeric. It is used by the application to differentiate Patron 1234 from Title 1234. |
| UNC | Universal Naming Convention. The format used to specify a file, using two backslashes to indicate the name of the computer, and one slash to indicate the path within the computer, as in: \\the server\the volume\the path\the file name. |
| Union Data Exchange | A Follett “service” that allows Unions and members to transfer MARC record and copy data across a network automatically. |
| unmount | The act of making an external directory structure, such as a CD-ROM database, inaccessible to a local computer system. |
| Update Keywords | A utility used to update the keyword index in the library database. This utility is only available if Catalog Plus is installed. |
| UPS | Uninterruptible Power Supply. A third-party hardware/software package designed to protect a specific computer from sudden power loss and possible data corruption by providing an emergency power source for the computer. |
| URI | A Uniform Resource Identifier. The generic set of all names and addresses which refer to objects on the Internet. |
| URL | A Uniform Resource Locator. An address system that uses a standardized access code for finding files located on computer networks. Consists of an access scheme followed by a file location. A subset of URIs. |

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| USB | Universal Serial Bus. |
| user-defined fine types | Besides the default fine types that come with Circulation Desk Setup, a user can add fine types as needed; for example, band uniform rental for which a fine could be assessed if the band uniform was damaged. These fines are not associated with copies. |
| USMARC | As of 1999, an obsolete term for the format of machine readable bibliographic and authority records. Replaced by MARC 21. |
| USMOC | An acronym for US MARC Organization Code. Also known as holdings code, used to uniquely identify an individual library and assigned by the Library of Congress. As of 1999, an obsolete term. Replaced by MOC. |
| Utilities | A module in Circulation Plus and Catalog Plus that allow users to diagnose or correct problems in their databases. |
| Visual OPAC | A highly graphical interface for Catalog Plus developed for the inexperienced patron. |
| WAN | Wide Area Network. A computer network that spans a long distance and uses specialized computers to connect smaller networks. |
| Web browser | A program that retrieves and displays Web pages. |
| Web server | The computer and/or software that runs the Web server program, such as WebCollection Plus. This "host" responds to HTTP-protocol requests. |
| WebCollection Plus | The online public access catalog application that allows users to search the library's database via the Internet. |
| Web page | A block of data available on the World Wide Web, identified and accessed by a URL. It is a file written in HTML, stored on a server. |
| WebPath Express (formerly 856Express) | A service available from Follett Software Company that provides access to selected Web sites through your OPACs, WebCollection Plus, and Cataloging. |
| Web site | Any computer on the Internet running a World Wide Web server process. A particular Web site is identified by the hostname part of a URL. |
| wildcard | A character used during keyword searches when the user is unsure of the spelling of a keyword or phrase or the form after the root. Use the question mark (?) to replace an unknown letter and the asterisk (*) for unknown letters or to broaden a search: i.e., wom?n for both woman and women or teach* for teach, teacher, teaching. |
| workstation | A computer on a network that bears no responsibilities for file sharing or database management. Used for library patron searches or circulation/cataloging activities. |
| World Wide Web | The graphical Internet hypertext service that uses the HTTP protocol to retrieve data. |

Appendix B Bibliographic and authority tags

This appendix contains information about the following cataloging information: Bibliographic tags: MARC tags used in bibliographic records; reading and interest levels and the 521 tag; reading programs and the 526 tag; searchable tags; MARC tags used in Cataloging and OPAC searches; Authority tags: MARC tags used in Authority records.

Bibliographic tags

The bibliographic tags recognized by Cataloging and the subfields on which they are indexed are identified and explained starting on page 628.

Use the following key to interpret the Bibliographic tags table column headings:

Key for the bibliographic tag description table

| Column | Description |
|----------------|---|
| No. | This column contains the tag number. |
| Description | This column contains the name of the tag according to the <i>MARC 21 Format for Bibliographic Data</i> publication. |
| Rep | This column identifies each tag as repeatable or non-repeatable. <ul style="list-style-type: none"> • Y: Repeatable • N: Non-repeatable |
| Pos1 and Pos 2 | These columns contain the default contents of the tag's first and second indicator positions, respectively. Note: This symbol ∅ represents a blank space and is only required when you are modifying templates during System Setup. |
| Valid | This column contains the subfields allowed in each tag. |
| Nonrep | This column contains the nonrepeatable subfields for each tag. |
| Indexed | This column contains the indexed subfields for each tag. These are the subfields used to conduct searches. Note: N/A is used to identify tags without subfields. This symbol only appears in the subfield columns (Valid, Nonrep, and Indexed). |

Important: The numbers entered in the indicator columns (Pos1 and Pos2) are the bibliographic template defaults. Other values are available.

Bibliographic tags

| No. | Description | Tag | Indicators | | | | Subfields | |
|-----|--|-----|------------|------|------|----------------------|-----------------|---------|
| | | | Rep | Pos1 | Pos2 | Valid | Nonrep | Indexed |
| 000 | Leader | | N | | | N/A | N/A | N/A |
| 001 | Control Number | | N | | | N/A | N/A | N/A |
| 003 | Control Number Identifier | | N | | | N/A | N/A | N/A |
| 005 | Date and Time of Latest Transaction | | N | | | N/A | N/A | N/A |
| 006 | Fixed-Length Data Elements—Additional Material Characteristics—General Information | | Y | | | N/A | N/A | N/A |
| 007 | Physical Description Fixed Field—General Information | | Y | | | N/A | N/A | N/A |
| 008 | Fixed-Length Data Elements—General Information | | N | | | N/A | N/A | N/A |
| 010 | Library of Congress Control Number | | N | | | abz | a | a |
| 015 | National Bibliography Number | | N | | | a6 | 6 | a |
| 020 | International Standard Book Number | | Y | | | acz6 | ac6 | a |
| 022 | International Standard Serial Number | | Y | ∅ | | ayz6 | a6 | a |
| 024 | Other Standard Identifier | | Y | 1 | ∅ | acd26 | acd26 | |
| 028 | Publisher Number | | Y | 0 | 0 | ab6 | ab6 | |
| 034 | Coded Cartographic Mathematical Data | | Y | 3 | ∅ | abcdefgh jkmnpst6 | defgijk mnp6 | |
| 035 | System Control Number | | Y | | | az6 | a6 | |
| 037 | Source of Acquisition | | Y | | | abcfgn6 | ab6 | |
| 040 | Cataloging Source | | N | | | abcde6 | abce6 | |
| 041 | Language Code | | N | ∅ | | abdefgh6 | abdefg6 | |
| 043 | Geographic Area Code | | N | | | ab2 | | |
| 050 | Library of Congress Call Number | | Y | ∅ | 4 | ab3 | b3 | |
| 051 | Library of Congress Copy, Issue, Offprint Statement | | Y | | | abc | abc | |
| 052 | Geographic Classification | | Y | | | ab | a | |
| 055 | Classification or Call Numbers Assigned in Canada | | Y | ∅ | 0 | ab28 | ab2 | |
| 060 | National Library of Medicine Call Number | | Y | ∅ | 4 | ab | b | |
| 082 | Dewey Decimal Classification (Call) Number | | Y | 0 | ∅ | ab2 | b2 | |
| 086 | Government Document Classification (Call) Number | | Y | ∅ | | az26 | a26 | |
| 100 | Main Entry—Personal Name | | N | 1 | | abcdefgk lnpqtu46 | abdfglqtu6 | abcdeq |
| 110 | Main Entry—Corporate Name | | N | 2 | | abcdefgk lnptu46 | acfgltu6 | abcdn |

Bibliographic tags (Cont.)

| No. | Description | Tag | Indicators | | | | Subfields | |
|-----|---|-----|------------|------|------|--------------------------|------------|----------|
| | | | Rep | Pos1 | Pos2 | Valid | Nonrep | Indexed |
| 111 | Main Entry—Meeting Name | | N | 2 | | acdefgkl npqtu46 | acdfglqtu6 | acden |
| 130 | Main Entry—Uniform Title | | N | 0 | | adefghklm noprst6 | afghlorst6 | adklmnps |
| 210 | Abbreviated Title | | N | 0 | ∅ | ab268 | ab6 | |
| 222 | Key Title | | Y | | 0 | ab68 | ab6 | ab |
| 240 | Uniform Title | | N | 1 | 0 | adefghklm noprs6 | afghlors6 | adklmnps |
| 245 | Title Statement | | N | 1 | 0 | abcdfghknps6 | abcdfghs6 | ab |
| 246 | Varying Form of Title | | Y | 3 | ∅ | abfghinp56 | abfghi56 | ab |
| 247 | Former Title or Title Variations | | Y | 1 | 1 | abfghnpx6 | abfghx6 | ab |
| 250 | Edition Statement | | N | | | ab6 | ab6 | |
| 254 | Musical Presentation Statement | | N | | | a6 | a6 | |
| 255 | Cartographic Mathematical Data | | Y | | | abcdefg6 | abcdefg6 | |
| 256 | Computer File Characteristics | | N | | | a6 | a6 | |
| 260 | Publication, Distribution, etc. (Imprint) | | R | | | abcefg6 | efg6 | |
| 270 | Address | | Y | | | abcdefghijk lmnpqrz46 | bcdefghi6 | |
| 300 | Physical Description | | Y | | | abcefg36 | be36 | |
| 310 | Current Publication Frequency | | N | | | ab6 | ab6 | |
| 321 | Former Publication Frequency | | Y | | | ab6 | ab6 | |
| 362 | Dates of Publication | | Y | 0 | | az6 | az6 | |
| 440 | Series Statement/ Added Entry—Title | | Y | | 0 | anpvx6 | avx6 | anp |
| 490 | Series Statement | | Y | 0 | | alvx6 | lx6 | a |
| 500 | General Note | | Y | | | a356 | a356 | |
| 501 | With Note | | Y | | | a56 | a56 | |
| 502 | Dissertation Note | | Y | | | a6 | a6 | |
| 504 | Bibliography, etc. Note | | Y | | | ab6 | ab6 | |
| 505 | Formatted Contents Note | | Y | 0 | ∅ | agrt6 | a6 | |
| 506 | Restrictions on Access Note | | Y | | | abcde356 | a356 | |
| 507 | Scale Note for Graphic Material | | N | | | ab6 | ab6 | |
| 508 | Creation/Production Credits Note | | N | | | a6 | a6 | |

Bibliographic tags (Cont.)

| No. | Description | Tag | Indicators | | | | Subfields | |
|-----|--|-----|------------|------|------|--------------------------------------|----------------------|--------------------|
| | | | Rep | Pos1 | Pos2 | Valid | Nonrep | Indexed |
| 510 | Citation/References Note | | Y | 0 | | abcx36 | abcx36 | |
| 511 | Participant or Performer Note | | Y | 0 | | a6 | a6 | |
| 515 | Numbering Peculiarities Note | | Y | | | a6 | a6 | |
| 520 | Summary, etc. Note | | Y | ∅ | | ab36 | ab36 | |
| 521 | Target Audience Note <i>See also:</i> For additional information about the 521 tag, see page 634. | | Y | ∅ | | ab36 | b36 | |
| 526 | Study Program Information Note <i>See also:</i> For additional information about the 526 tag, see page 635. | | Y | 0 | | abcdixz568 | abcdi56 | |
| 530 | Additional Physical Form Available Note | | Y | | | abcd368 | abcd368 | |
| 533 | Reproduction Note | | Y | | | abcdefmn 3678 | ade367 | |
| 534 | Original Version Note | | Y | | | abceklmn ptxz68 | abcelmpt6 | |
| 538 | System Details Note | | Y | | | a6 | a6 | |
| 546 | Language Note | | Y | | | ab36 | a36 | |
| 550 | Issuing Body Note | | Y | | | a6 | a6 | |
| 555 | Cumulative Index Note | | Y | ∅ | | abcd36 | acd36 | |
| 586 | Awards Note | | Y | ∅ | | a36 | a36 | |
| 590 | Local Notes | | Y | | | a | a | |
| 600 | Subject Added Entry—Personal Name | | Y | 1 | 7 | abcdefghk lmnopqrst uvwxyz2346 | abdfghloq rstu236 | abcdeklm qtvxyz |
| 610 | Subject Added Entry—Corporate Name | | Y | 2 | 7 | abcdefghk lmnoprstuv xyz2346 | acefghlors tu236 | abcdklmpt vxyz |
| 611 | Subject Added Entry—Meeting Name | | Y | 2 | 7 | acdefghkl npqstuvxy z2346 | acdfghlqst u236 | acdeklmp tvxyz |
| 630 | Subject Added Entry—Uniform Title | | Y | 0 | 7 | adefghklm noprstvxy z236 | afghlorst 236 | adklmnp s vxyz |
| 650 | Subject Added Entry—Topical Term | | Y | ∅ | 7 | abcdevxyz 236 | abcde236 | avxyz |
| 651 | Subject Added Entry—Geographic Name | | Y | | 7 | avxyz236 | a236 | avxyz |
| 655 | Index Term—Genre/Form | | Y | ∅ | 7 | abcvxyz 236 | a2356 | avxyz |

Bibliographic tags (Cont.)

| No. | Description | Tag | Indicators | | | | Subfields | |
|-----|--|-----|------------|------|------|--|-----------------------|-----------|
| | | | Rep | Pos1 | Pos2 | Valid | Nonrep | Indexed |
| 658 | Index Term—Curriculum Objective | | Y | | | abcd26 | acd26 | ab |
| 69X | Local Subject Access Fields | | Y | | | abcdefghij klmnopqr stuvwxyz 0123456789 | a | avxyz |
| 700 | Added Entry—Personal Name | | Y | 1 | ∅ | abcdefghk lmnopqrst ux3456 | abdfghloqr stux356 | abcdeq |
| 710 | Added Entry—Corporate Name | | Y | 2 | ∅ | abcdefghk lmnoprstu x3456 | acfglorstu x356 | abcdn |
| 711 | Added Entry—Meeting Name | | Y | 2 | ∅ | acdefghkl nopqrst3456 | acdfghlqst ux356 | acden |
| 730 | Added Entry—Uniform Title | | Y | 0 | ∅ | adefghklm noprstx356 | afghlorstx 356 | adklmnp |
| 740 | Added Entry—Uncontrolled Related/ Analytical Title | | Y | 0 | 2 | ahnp56 | ah56 | a |
| 753 | System Details Access to Computer Files | | Y | | | abc6 | abc6 | |
| 790 | Added Entry—Local | | Y | | | abcdefghijk lmnopqrst uvwxyz012 3456789 | a | a |
| 791 | Added Entry—Local | | Y | | | abcdefghijk lmnopqrst uvwxyz012 3456789 | a | a |
| 800 | Series Added Entry—Personal Name | | Y | 1 | | abcdefghk lmnopqrst uv46 | abdfghloqr stuv6 | abcdklmpt |
| 810 | Series Added Entry—Corporate Name | | Y | 2 | | abcdefghkl mnoprstu v46 | acfglorst uv6 | abcdklnt |
| 811 | Series Added Entry—Meeting Name | | Y | 2 | | acdefghkl noprstuv46 | acdfghlqs tuv6 | acdeklnt |
| 830 | Series Added Entry—Uniform Title | | Y | | 0 | adefghklm noprstv6 | afghlorstv6 | adklnt |
| 852 | Location | | Y | ∅ | ∅ | abceghijkl mnpqstxz 2389 | ahjlmnpq t2386 | |
| 856 | Electronic Location and Access | | Y | 4 | | abcdefghijk lmnopqrstu vwxyz236 | hijklmnopq r236 | |

Bibliographic tags (Cont.)

| No. | Description | Tag | Indicators | | | | Subfields | |
|-----|-------------------|-----|------------|------|------|--------|-----------|---------|
| | | | Rep | Pos1 | Pos2 | Valid | Nonrep | Indexed |
| 900 | Local Call Number | | N | | | a | a | |
| 901 | Copy Information | | Y | | | abcdef | abcdef | |

Tags in the Easy Editor

The following table shows the tags and subfields in the MARC record that are used when cataloging in the Easy Editor. For further information on the tags, their indicators, and subfields, see the previous Bibliographic tags table.

Tags in the Brief MARC Record tab

| Field name | Tag/subfield |
|----------------------|--------------|
| Title | 245a |
| Subtitle | 245b |
| Responsibility | 245c |
| Edition | 250a |
| LCCN | 010a |
| ISBN | 020a |
| ISSN | 022a |
| Material Type | 000 |
| Author | 100a |
| Dates | 100d |
| Place of Publication | 260a |
| Publisher | 260b |
| Date of Publication | 260c |
| Extent | 300a |
| Other Detail | 300b |
| Size | 300c |

Tags in the Added Description tab

| Field name | Tag/subfield |
|-------------------|---------------------|
| Series | 440a |
| Volume | 440v |
| General Note | 500a |
| Summary Note | 520a |
| Interest Level | 521a |
| Study Program | 526a |
| Web URL | 856u |
| Description | 856z |

Tags in the Subjects tab

| Field name | Tag/subfield |
|-------------------|---------------------|
| Topical | 650a |
| Personal | 600a |
| Geographic | 651a |
| Local | 690a |
| General | 6XXx |
| Geographic | 6XXz |
| Chronological | 600d, 65Xy, or 690y |
| Form | 6XXv |

Tags in the Added Entries tab

| Field name | Tag/subfield |
|-------------------|---------------------|
| Other Author Name | 700a |
| Dates | 700d |

Reading and interest levels and the 521 tag

The Target Audience Note (521 tag) in the MARC 21 bibliographic record contains information about reading and interest levels. The 521 tag is a repeatable tag. Decide what type of reading or interest level that you will be putting in the tag, and set the first indicator accordingly. Then enter the value in subfield a. The following table outlines some of the possible indicator and value combinations.

Reading and interest levels

| Target Audience Information | First Indicator | Subfield Information |
|-----------------------------|-----------------|---|
| Reading Grade Level | 0 | _a (R) Any value or range of values between 0.1 and 20.0. |
| Interest Grade Level | 2 | _a (R) Must contain one of the following: <ul style="list-style-type: none"> • Preschool • K-3 • 3-6 • All Juvenile • 5-8 • 7-10 • All Secondary • All Grades • Young Adult • Adult • Professional |
| Lexile Measures | 8 | _a (R) Can include up to a four digit Lexile value, one of the following two letter prefixes, or both (e.g. AD 200).* <ul style="list-style-type: none"> AD-Adult Directed BR-Beginning Reading IG-Illustrated Glossary NC-Non-Conforming Text NP-Non-Prose _b (NR) Must contain the word Lexile for the record to be found during a Lexile search. <p>Important: Make sure you set the indicator to 8. Otherwise, the Lexile measure does not appear in a Lexile Search results list. In addition, an Alliance Plus autorecon may update a 521 tag with an indicator of 0 or 2, but skips one with an 8.</p> |

* For more information on Lexile Measures, visit <http://www.lexile.com>.

| Examples: | Tag | Subfield | Entry |
|-----------|--------|----------|---------------------------|
| | 521 0ø | _a | 6.2 |
| | | _b | Follett Library Resources |
| | 521 2ø | _a | 3-6 |
| | 521 8ø | _a | 850 |
| | | _b | Lexile.com |

There are two ways you and your patrons can search for items in your collection that belong to a reading or study program:

- A keyword search examines the 521 tag. You can retrieve titles belonging to any reading program.
- A Lexile search examines the 521 tag specifically for Lexile information. FSC's Find-a-Book service can add the 521 tag information to the applicable records in your MARC database if you participate in these programs.

Important: For the Lexile Search to find the record, 521_b must contain the word "Lexile". If you do not enter a point value in 521_a, the selection list will show a 0 in the Points column. For the Lexile Search to display the Lexile measure, the first indicator must be set to **8**.

Reading programs and the 526 tag

The Study Program Information Note (526 tag) in the MARC 21 bibliographic record contains information about reading and study programs. To retrieve titles in Cataloging and OPAC that belong to a program, you must follow the guidelines provided in the following table:

| 526 tag | Study Program Information Note (R) | Guidelines |
|-------------|---|--|
| Indicator 1 | Display constant controller 0 Reading program 8 No display constant generated | Enter 0 if you participate in a reading program. |
| Indicator 2 | Undefined | |
| Subfields: | _a Program name (NR) | Enter the name of the study or reading program. Enter Accelerated Reader or AR if you use the Accelerated Reader Search feature. Enter Reading Counts or RC if you use Scholastic Reading Counts!™ |
| | _b Interest level (NR) | Enter the interest level that is assigned to the item by the study program. Note: The level entered here may not always agree with the interest level in the 521 tag. |
| | _c Reading level (NR) | Enter the reading level assigned by the program. Note: The level entered here may not always agree with the reading level in the 521 tag. |
| | _d Title point value (NR) | If your study program assigns point values to individual titles, enter it here. |
| | _i Display text (NR) | Enter any information that should precede the name of the study program. |

| 526 tag | Study Program Information Note (R) | Guidelines |
|---------|---|---|
| _z | Public note (R) | Enter a note that will display in the OPAC. Use this subfield for quiz numbers related to this item in the reading program. |
| _5 | Institution to which field applies (NR) | Enter your MARC Organization Code. |

Example:

| Tag | Subfield | Entry |
|--------|----------|--------------------|
| 526 0ø | _a | Accelerated Reader |
| | _c | 2.7 |
| | _d | 0.5 |
| | _z | 1234 |

There are two ways you, in Cataloging, and your patrons, in the OPAC, can search for items in your collection that belong to a reading or study program:

- The keyword search examines the 526 tag. You can retrieve titles belonging to any reading program.
- The Accelerated Reader and Reading Counts! searches examine the 526 tag for information. With those search dialogs, you can further limit the search to a certain reading level range, point value range, a subject and/or an author.

Important: For the Accelerated Reader Search to find the record, you must enter either **Accelerated Reader** or **AR** at the beginning of subfield a. The same is true for Reading Counts!, where you must enter either **Reading Counts** or **RC**.

In the text OPAC, the full Marc record display includes subfields a, b, c, d, and z (at Union Catalog Plus sites, subfield 5 also displays). In the visual OPAC, the record display includes subfields a, c, d, and z.

Tip: FSC's Reading Program Recon available through Alliance Plus can add the 526 tag information to the applicable records in your MARC database if you have a subscription to the Reading Program Recon service. See your automation consultant.

Searchable tags

This section describes the MARC bibliographic and authority tags used to conduct searches in Cataloging and the OPAC. The following table contains a list of the corresponding tags that Cataloging checks when searching. For more detail on these tags, see the table of bibliographic tags starting on page 627.

Cataloging and OPAC search types

| When you search for: | Cataloging/OPAC looks in these tags: |
|-------------------------------|---|
| Title | 130, 222, 240, 245, 246, 247, 730, 740 |
| Author | 100, 110, 111, 700, 710, 711, 790, 791 |
| Call number | Looks in the copy record, not the MARC bibliographic record |
| Barcode | Looks in the copy record, not the MARC bibliographic record |
| ISBN | 020 |
| ISSN | 022 |
| LCCN | 010 |
| National Bibliographic Number | 015 |
| Category | Looks in the copy record, not the MARC bibliographic record |
| Subject | 600, 610, 611, 630, 650, 651, 655, 658, 690-699 |
| Series | 400, 410, 411, 440, 490, 800, 810, 811, 830 |
| Keyword (Author) | 100, 110, 111, 700, 710, 711 |
| Keyword (Title) | 130, 222, 240, 245, 246, 247, 730, 740 |
| Keyword (Note) | 270, 500, 501, 505, 508, 510, 511, 520, 521, 526, 530, 538, 546, 550, 586, 590, 753, 856 |
| Keyword (Series) | 400, 410, 411, 440, 490, 800, 810, 811, 830 |
| Keyword (Subject) | 600, 610, 611, 630, 650, 651, 655, 657, 658, 690, 691, 692, 693, 694, 695, 696, 697, 698, 699 |
| Accelerated Reader | 526 |
| Reading Counts! | 526 |
| Lexile | 521 |

Tags displayed in online public access catalogs

The online public access catalogs allow your patrons to switch between full and brief record formats. The following table lists the bibliographic tags displayed in each format:

Tags used in brief and full record display

| OPAC heading | Tags used | Brief | Full | Visual OPAC |
|---------------|-------------------------|-------|------|---------------------------------------|
| Title | 245 | • | • | • |
| Uniform Title | 210, 240 | | • | |
| Key Title | 222 | | • | |
| Added Title | 246, 247 | | • | |
| Author | 1XX | • | • | • |
| Series | 4XX, 800, 810, 811, 830 | | • | |
| Published | 260 | • | • | |
| Phys. Desc. | 300 | • | • | a only |
| Edition | 250 | | • | |
| Notes | 5XX | | • | 505a, 511a, 520a, 521, 526 only |
| Address | 270 | | • | |
| Elec. Access | 856 | | • | • |
| Subject | 6XX | | • | |
| Added Entry | 7XX | | • | |
| Call Number | 900* | • | • | • |

*The 900 tag is only used if a record has no copies attached to it.

Authority tags

All authority records saved in the MARC Editor must have data entered in one 100-series tag (100, 110, 111, 130, 150, 151, or 155). The authority tags used by Cataloging to index authority records for searching and cataloging are identified starting on page 639.

Use the following key to interpret the Authority tags table column headings.

Key for the authority tag description table

| Column | Description |
|-------------|--|
| No. | This column contains the tag number. Note: The asterisk (*) indicates that the tag is no longer valid. This character only appears in the No. column. |
| Description | This column contains the name of the tag according to the <i>MARC 21 Format for Authority Data</i> publication. |
| Rep | This column identifies each tag as repeatable or non-repeatable. <ul style="list-style-type: none"> • Y: Repeatable • N: Non-repeatable |
| Pos1 | This column contains the default contents of the tag's first indicator position. If the number in this column appears in parentheses, the indicator is a nonfiling character. Note: This symbol ∅ represents a blank space and is only required when you are modifying templates during system setup. This symbol only appears in the Pos1 column. |
| Pos2 | This column contains the contents of the tag's second indicator position. If the number in this column appears in parentheses, the indicator is a nonfiling character. |
| Valid | This column contains the subfields allowed in each tag. |
| Nonrep | This column contains the nonrepeating subfields for each tag. |
| Indexed | This column contains the indexed subfields for each tag. These are the subfields used to conduct searches. Note: N/A is used to identify tags without subfields. This symbol only appears in the subfield columns (Valid, Nonrep, and Indexed). |

Important: The figures presented in the indicator columns (Pos1 and Pos2) are Cataloging defaults. Other combinations may be possible.

Authority tags

| No. | Description | Tag | Indicators | | | | Subfields | |
|-----|----------------|-----|------------|------|------|-------|-----------|---------|
| | | | Rep | Pos1 | Pos2 | Valid | Nonrep | Indexed |
| 000 | Leader | | N | | | N/A | N/A | N/A |
| 001 | Control Number | | N | | | N/A | N/A | N/A |

Authority tags (Cont.)

| No. | Description | Tag | Indicators | | | | Subfields | |
|-----|-------------------------------------|-----|------------|------|------|------------------------------------|---------------------|--------------------|
| | | | Rep | Pos1 | Pos2 | Valid | Nonrep | Indexed |
| 003 | Control Number Identifier | | N | | | N/A | N/A | N/A |
| 005 | Date and Time of Latest Transaction | | N | | | N/A | N/A | N/A |
| 008 | Fixed-Length Data Elements | | N | | | N/A | N/A | N/A |
| 010 | Library of Congress Control Number | | N | | | az | a | a |
| 035 | System Control Number | | Y | | | az6 | a6 | |
| 040 | Cataloging Source | | N | | 4 | abcdf | abcf | |
| 053 | LC Classification Number | | Y | | | abc5 | abc | |
| 073 | Subdivision Usage | | N | | | az6 | z6 | |
| 083 | Dewey Decimal Classification Number | | Y | 0 | 4 | abcz256 | abcz26 | |
| 100 | Heading—Personal Name | | N | 1 | | abcdefghijkl mnopqrstv xyz6 | abdfghloq rst6 | abcdeklm qtvxyz |
| 110 | Heading—Corporate Name | | N | 2 | | abcdefghijkl mnoprstvx yz6 | acfglhorst6 | abcdklnp tvxyz |
| 111 | Heading—Meeting Name | | N | 2 | | acdefghkl pqstvwxyz6 | acdfghlqst6 | acdeklnt vxyz |
| 130 | Heading—Uniform Title | | N | | 0 | adefghklm noprstvxy z6 | afghlorst6 | adklmnp svxyz |
| 150 | Heading—Topical Term | | N | | | abvxyz6 | ab6 | avxyz |
| 151 | Heading—Geographic Name | | N | | | avxyz6 | a6 | avxyz |
| 155 | Heading—Genre/Form | | N | | | avxyz6 | a6 | avxyz |
| 400 | See From Tracing—Personal Name | | Y | 1 | | abcdefghik lmnopqrst vwxyz56 | abdfghiloq rstw6 | abcdeklmq tvxyz |
| 410 | See From Tracing—Corporate Name | | Y | 2 | | abcdefghik lmnoprstv wxyz56 | acfglhorst w6 | abcdklnt vxyz |
| 411 | See From Tracing—Meeting Name | | Y | 2 | | acdefghik lmpqstvwxy z56 | acdfghilqst w6 | acdeklnt vxyz |
| 430 | See From Tracing—Uniform Title | | Y | | 0 | adefghiklm noprstvw yz56 | afghlorst w6 | adklmnp svxyz |
| 450 | See From Tracing—Topical Term | | Y | | | abivwxy z56 | abiw6 | avxyz |

Authority tags (Cont.)

| No. | Description | Tag | Indicators | | | | Subfields | |
|-----|---------------------------------------|-----|------------|------|------|---------------------------------------|---------------------|--------------------|
| | | | Rep | Pos1 | Pos2 | Valid | Nonrep | Indexed |
| 451 | See From Tracing—Geographic Name | | Y | | | aivwxyz56 | aiw6 | avxyz |
| 455 | See From Tracing—Genre | | Y | | | aivwxyz56 | aiw6 | avxyz |
| 500 | See Also From Tracing—Personal Name | | Y | 1 | | abcdefghijkl lmnopqrst vwxyz056 | abdfghiloq rstw6 | abcdeklm qtvxyz |
| 510 | See Also From Tracing—Corporate Name | | Y | 2 | | abcdefghijkl lmnoprstv wxyz056 | acfghilors tw6 | abcdklmptv xyz |
| 511 | See Also From Tracing—Meeting Name | | Y | 2 | | acdefghikl nopqrstvwxy z056 | acdfghilqs tw6 | acdeklmp tvxyz |
| 530 | See Also From Tracing—Uniform Title | | Y | | 0 | adefghiklm noprstvw xyz056 | afghilors tw6 | adklmnpv xyz |
| 550 | See Also From Tracing—Topical Term | | Y | | | abivwx yz056 | abiw6 | avxyz |
| 551 | See Also From Tracing—Geographic Name | | Y | | | aivwx yz056 | aiw6 | avxyz |
| 555 | See Also From Tracing—Genre | | Y | | | aivwx yz056 | aiw6 | avxyz |
| 665 | History Reference | | N | | | a6 | 6 | |
| 666 | General Explanatory Reference—Name | | N | | | a6 | 6 | |
| 667 | Nonpublic General Note | | Y | | | a56 | a6 | |
| 670 | Source Data Found | | Y | | | ab6 | ab6 | |
| 675 | Source Data Not Found | | N | | | a6 | 6 | |
| 680 | Public General Note | | Y | | | ai56 | 6 | |
| 681 | Subject Example Tracing Note | | Y | | | ai6 | 6 | |
| 688 | Application History Note | | Y | | | a56 | a6 | |
| 856 | Electronic Access | | Y | | | 4 | | |

Notes

Appendix C Bibliographic and authority templates

The MARC bibliographic and authority templates determine which tags and corresponding values appear automatically when you create a new record. If you only do occasional cataloging, we recommend that you use the input templates as they are. But if you are a professional cataloger and find yourself making the same changes every time you create a new MARC bibliographic or authority record, you may want to edit the template.

Note: Bibliographic and authority templates cannot be modified on Mac OS.

Modifying templates can save you time when creating new records. The settings should correspond to your most frequently cataloged items. For example, if you do your own original cataloging, change the bibliographic 040 tag, subfields *_a* and *_c*, so they contain your MARC organization code. This means you won't have to type the code in for every new record you create. Or, if you always use Library of Congress subject headings, modify the 650 tag, changing the second indicator to "0" and deleting subfield *_2*.

You can't delete input templates or create new ones, but when the need arises, you can modify them. This appendix contains instructions for the following: selecting a template; editing the leader, 007, and 008 tags; editing an existing tag in a template; inserting a tag into a template.

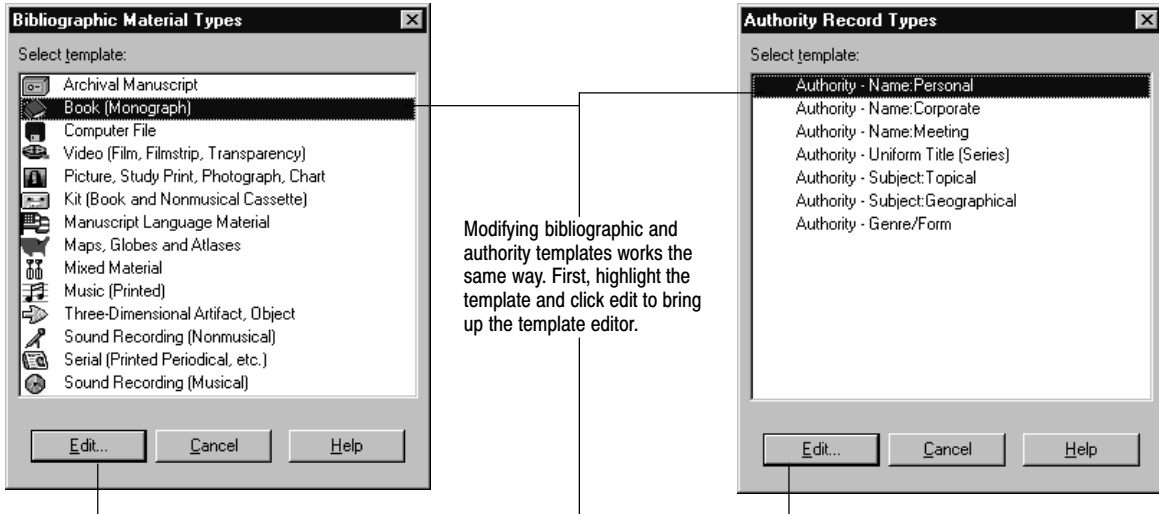
Selecting a template

The instructions for modifying templates show dialogs from the book (bibliographic) and personal name (authority) templates. The steps are the same for all input templates, but the values and tags vary. We strongly recommend that you refer to the Library of Congress publications, *MARC 21 Format for Bibliographic Data* and *MARC 21 Format for Authority Data*, for additional guidance.

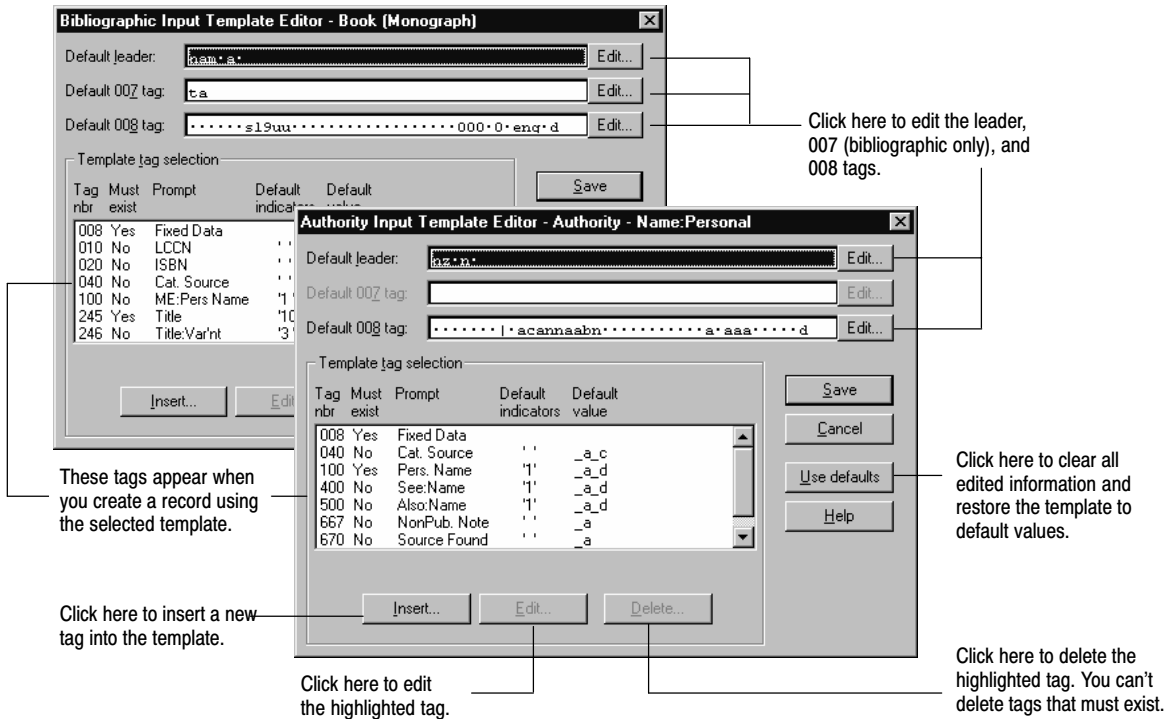


1. From the System Setup menu bar, choose either Templates | Bibliographic or Templates | Authority. The appropriate selection list box appears. Highlight the template you want to edit and click Edit to bring up the template editor.

- From the template editor, you can edit the Default leader, 007 (bibliographic templates only), or 008 fixed-length tags, or edit, insert, or delete the variable-length tags, as discussed on the following pages.



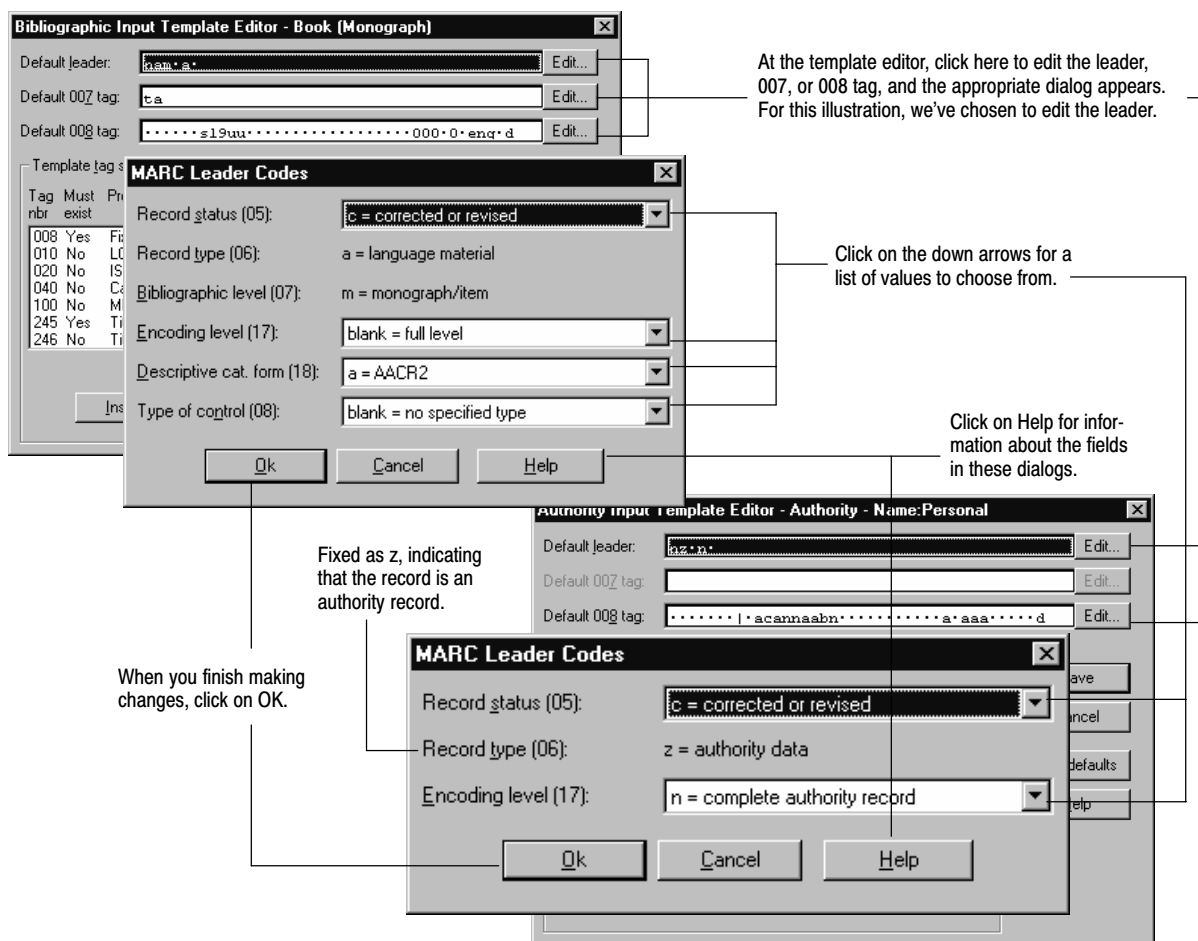
Then, at the template editor, make the appropriate changes:



Editing the leader, 007, and 008 tags

To edit the leader, click Edit for the Default leader. The dialog appears, where you can click on the down arrows and select the appropriate content for the various fields. Click Help for additional information. When you're done, click Ok.

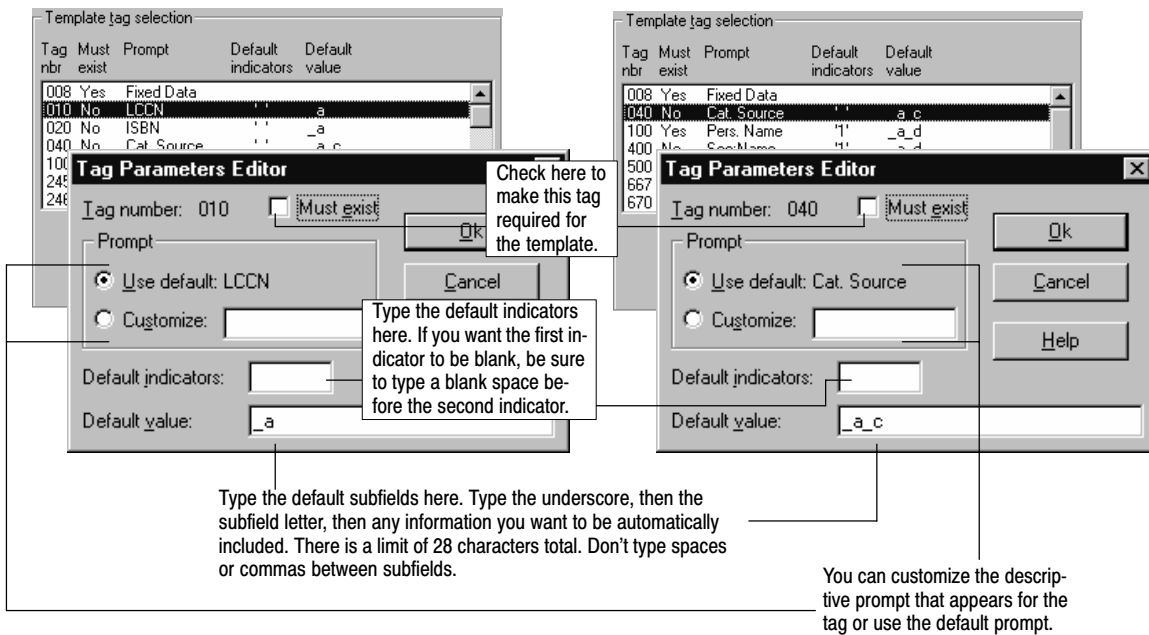
To edit the 007 (bibliographic templates only) or 008 tags, follow the same procedure, except click Edit for the Default 007 or 008 tags. There is information in the 007 and 008 tags that is material specific. If you modify one of these tags, make sure to modify the other accordingly for the material type.



Editing an existing tag in a template

In the Template tag selection list box, highlight the tag you want to edit, and then click Edit. The Tag parameters editor dialog for the selected tag appears, where

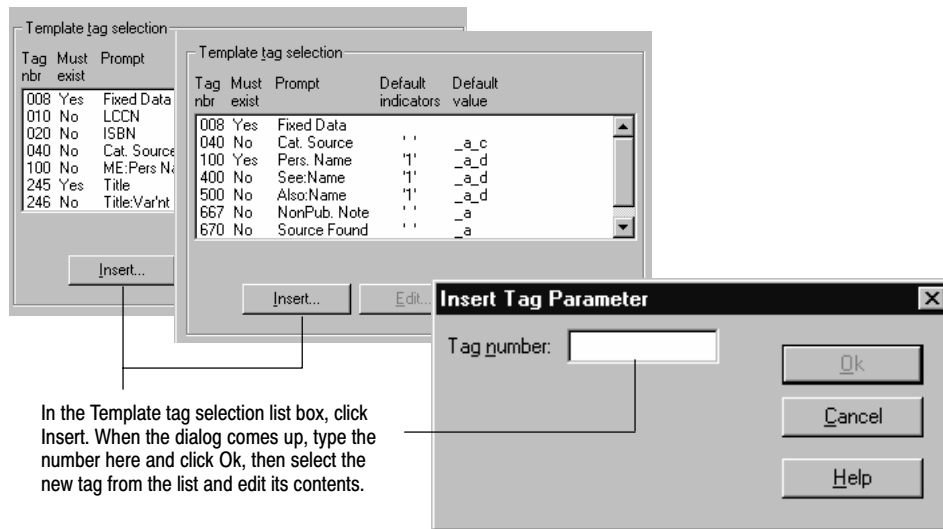
you can make the necessary changes, as described in the following illustration:



Inserting a tag into a template

Under the Template tag selection list box, choose Insert. The Insert tag parameter dialog appears, where you enter the tag number and click Ok. Then, to edit the new tag, highlight it, click Edit, and make the changes as described above.

Note: If the tag is repeatable, you can add the tag multiple times into the template.



Appendix D Barcode symbologies

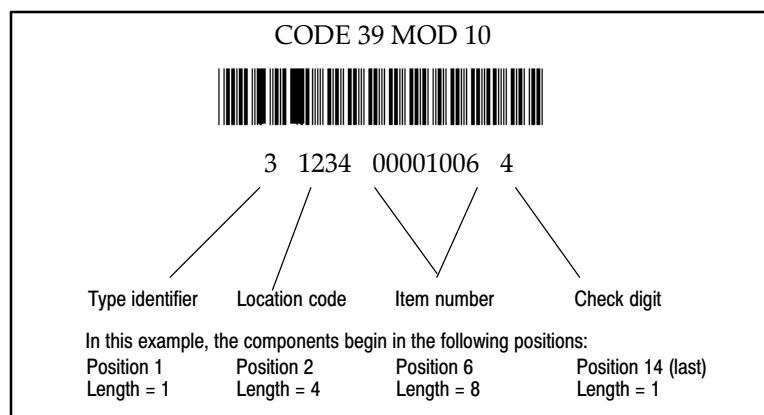
If your site uses any barcode symbology other than Follett Classic, you must define the barcode symbology. This appendix contains the following information: an overview of barcode composition; basic barcode terminology; a listing of your barcode symbology options; instructions for defining your barcode symbologies; and a description of how to assign barcodes to items and patrons.

What does a barcode contain?

A barcode contains two primary parts: bars and spaces. A row of numbers beneath the barcode, called the eye-readable line, is an interpretation of what the bars and spaces represent.

As shown in the figure below, the bars and spaces can be broken down even further into the following components:

- Type identifier
- Location code
- Item number
- Check digit



The order of the components may vary except for the check digit, which always remains in the last position if it is part of the symbology.

Not every barcode symbology will contain all of the components. For example, your site might not use location code.

Important: If you will be using a PHD to collect barcodes, your barcodes must include a Type Identifier regardless of the symbology you choose. Follett Classic symbologies assume a Type Identifier of “P” for patron barcodes and a “T” for library material barcodes.

Barcode terminology

For explanations of the terminology used in barcode names and some criteria for selecting Follett Classic or one of the other symbologies, see the following table:

Barcode terminology

| Barcode term | Description |
|------------------------|--|
| Check digit | The check digit is always the last character and ensures accurate readings when barcodes are scanned. |
| Follett Classic | A family of barcode symbologies consisting of barcodes that contain seven visible positions or fewer. The Follett Classic family of symbologies includes: Code 39, Interleaved 2 of 5, Codabar, LabelCode IV, and LabelCode V. If your barcodes fit this description, choose Follett Classic as your symbology. |
| Generic | Means the barcode symbology does not use a check digit. |
| Mod 10 | Symbologies with Mod 10 check digit calculations can be used for barcodes with all numeric characters. The 10 numeric characters are used to calculate a check digit algorithm. |
| Mod 11 | The same restrictions apply to symbologies using the Mod 11 algorithm as to those that use Mod 10. The only difference is that the check digit in Mod 11 can also use the “+” symbol. |
| Mod 43 | The Mod 43 check digit uses the 26 alpha characters, the 10 numeric characters, and these symbols: - . \$ + % / and the space. The item number portion of the barcode must still be all numeric. If your barcodes contain alpha characters for the type identifier or location code, you will probably choose a symbology that uses a Mod 43 check digit. |

What are your barcode options?

The Follett applications recognize many industry-standard barcode symbologies. The following table lists and describes your barcode options:

| Symbology | Description |
|----------------------------------|--|
| Follett Classic symbologies | A family of symbologies consisting of barcodes that contain seven visible positions or fewer. The Follett Classic family of symbologies includes: Code 39, Interleaved 2 of 5, Codabar, LabelCode IV, and LabelCode V. |
| Generic Codabar | Codabar barcodes can have up to 14 visible positions and be composed of 16 different characters: 0 through 9, plus the symbols: - \$: / . and +. Generic symbologies do not use check digits. The item number portion of the barcode must be all numeric. |
| Codabar Mod 10 | A variation of the Codabar symbology that uses the Mod 10 check digit algorithm. Any symbology that uses the Mod 10 algorithm must be entirely numeric. |
| Generic Code 39 | Code 39 barcodes can have up to 14 visible positions and be composed of 43 characters: 0 through 9, the 26 uppercase letters of the alphabet, and the following symbols: - . \$ / + % and the space. Generic symbologies do not use check digits. The item number portion of the barcodes must be all numeric. |
| Code 39 Mod 10 Code 39 Mod 11 | These are variations of the Code 39 symbology. Mod 10 uses the Mod 10 algorithm, meaning that the barcode must be entirely numeric. Mod 11, like Mod 10, also requires that the barcode be entirely numeric with the exception of the check digit, which can be the "+" symbol. |
| Code 39 Mod 43 | Mod 43 barcodes use the Mod 43 check digit algorithm, meaning that any of the 43 acceptable characters may be used in the type identifier, location code, and check digit portions of the barcode. The item number must be numeric. If your site uses an alphabetical type identifier or location code, you should use this symbology. |
| Generic Interleaved 2 of 5 | Interleaved 2 of 5 barcodes can have up to 14 visible positions and must be entirely numeric. |
| Interleaved 2 of 5 A | A variation of the Interleaved 2 of 5 symbology that uses the "A" check digit algorithm. |
| Generic LabelCode 5 | LabelCode 5 barcodes consist of five data digits and a check digit. |

See also: For a list of the barcode symbologies that can be read by the PHD units, see page 38.

Defining the barcode symbology

When you define a barcode symbology, you tell Circulation Desk, Cataloging, and Patron Maintenance:

- If a component, such as the location code, exists in the symbology your site uses.
- The position of the component in the barcode symbology.
- The length of the component.

Together, this information makes up the barcode symbology definition that appears in the Barcodes tab in System Setup:

You cannot edit the definition of the Follett Classic symbology. If you select Follett Classic, the grayed information does not correspond to the Follett Classic definition, but rather the default definition for a non-Follett Classic symbology or the last-defined non-Follett Classic symbology.

For non-Follett Classic symbologies, you must specify the beginning position and the length of each component. Refer to the barcode image on page 647 for a visual example.

To cancel changes before saving

Note: To obtain specific information about your barcode symbology, please contact your barcode vendor.

The following table lists and describes the information you need to know about your barcodes to set up your barcode symbologies for Circulation Plus/Catalog Plus:

Barcode Setup dialog options

| Field | Description |
|--|---|
| Symbology | Name of the barcode symbology that the system uses to check barcodes when searching for a patron or library item. |
| Uses Type Identifier Characters | To have a position in your barcodes to distinguish between patrons and library materials, select this check box. This position ensures that you do not accidentally scan a patron number instead of a library material number, which could cause you to check out a copy instead of scanning a new patron. This can only happen if you use the same symbology for both. Important: If you plan to use a PHD, you must check this box. Enter the Type Identifier Characters for your symbology in the next field. |
| One of | This field does not accept entries unless you selected the Uses Type Identifier Characters check box. You can use up to six separate alpha or numeric uppercase characters (one in each box). Defaults: 2=patrons, 3=library materials Note: Patron and library item barcodes cannot have the same identifier characters. |
| Uses a Location Code | To use positions in your barcodes to identify your location, select this check box. For more information, see "Location Code: Position" below. |
| Type Identifier: Position | The position in the barcode where the type identification character is located. |
| Type Identifier: Length | The number of digits in the type identifier. This can be either zero or one, depending on the symbology. |
| Location Code: Position | The location code is typically 4-5 characters and helps identify all the titles that belong to your library. Sites considering participation in interlibrary loaning will want to use a location code. Make sure your location code is unique from the other libraries in your district or other interlibrary loan entities. If you do not check the Uses Type Identifier Characters check box, the Location Code must be in position 1. |
| Location Code: Length | Number of digits in the location code, up to 8. |
| Item Number: Position | The position in the barcode where the item number data begins. |
| Item Number: Length | The number of digits in the item number, up to 14. |
| Check Digit: Position | The position in the barcode where the check digit is located. This field is initially None. It changes to Last if the selected symbology is neither Generic nor Follett Classic. |

Barcode Setup dialog options (Cont.)

| Field | Description |
|---------------------|--|
| Check Digit: Length | The number of digits in the check digit. This field is initially 0. It changes to 1 if the selected symbology is neither Generic nor Follett Classic. |
| Total length | The total number of characters and digits in the barcode, including the check digit. If you are editing this field, you can only enter the numbers 4 through 14. |

Assigning barcodes

Circulation Plus/Catalog Plus allows you to automatically assign the next highest available barcode number to an item or a patron. For example, when you create a patron record, you can either manually assign a barcode by scanning the number of a physical barcode, or you can let Patron Maintenance automatically assign a barcode number for you. It does this by finding the highest number that has been used in your patron barcode symbology and incrementing the item number by one. If necessary, a check digit is also calculated, but the rest of the barcode definition remains the same.

Important: Circulation Plus/Catalog Plus use the next highest available barcode, not the first unused barcode.

Keep the following in mind when allowing Circulation Plus and Catalog Plus to assign barcode numbers for you:

- Before you assign a barcode, one barcode must already exist that matches your symbology. For example, if you change your symbology for library materials to a 14-digit Code 39 Mod 10 symbology, you must first manually assign a barcode number to an item before the system can automatically assign a barcode number.
- If you define a non-Follett Classic symbology in System Setup, Circulation Plus and Catalog Plus use the non-Follett Classic symbology as the basis for generating new barcode numbers, not Follett Classic.
- If you assign the highest item number available in your symbology, Circulation Plus and Catalog Plus cannot automatically assign any more barcode numbers for you. For example, if you use Follett Classic as your symbology for library materials, and you assign T 9999999 to an item, you will no longer be able to automatically assign any more barcode numbers to library materials.
- While Circulation Plus and Catalog Plus support item number lengths up to 14 characters, the Assign Barcode feature is limited to barcode symbologies containing item lengths of 9 characters or less. If your symbology includes an item number length greater than 9, you cannot use the Assign Barcode feature.

Appendix E Using a PHD+, PHD+ II, or PHD Laser+

A PHD (Portable Handheld Device) is a barcode scanner that collects, stores, and transmits data. You can use a PHD to simplify certain circulation, cataloging, inventory, and reporting activities. Follett Software currently supports four PHD models. This appendix provides a comparison of the three Telxon™ models and instructions for their use and maintenance.

Important: This appendix is intended to complement, **not** duplicate, the reference materials that came with your Telxon PHD.

See also: For information about the PHD Dolphin+ from Hand Held® Products, see Appendix F, “Using a PHD Dolphin+.”

PHD+, PHD+ II, and PHD Laser+: the Telxon models

Currently, Follett Software supports three Telxon PHDs: the original PHD+, the PHD+ II (July 1993), and the PHD Laser+ (spring 1997). As the following table shows, there are a few differences between the three models:

| Feature | PHD+ (PTC-620) | PHD+ II (PTC-600) | PHD Laser+ (PTC-960L) |
|------------------------------|----------------|----------------------------|----------------------------|
| Number of scans | 300 to 350* | 4000 to 5000* | 4000 to 5000* |
| Number and size of batteries | 4 AAA | 3 AA | 1 alkaline 9 volt |
| Backup battery | lithium | supercap (super capacitor) | supercap (super capacitor) |

* These are general estimates. The actual number of scans depends on the amount of memory in the unit. To determine the maximum scans, from the PHD main menu, press <L>. The unit's available memory appears (in bytes). Divide this figure by 22.

The battery requirements are also different for the three units. Consult your Telxon guide or “Maintenance information” (page 668) for battery information.

The PHD you have purchased includes:

- a PHD+ unit with four size AAA rechargeable NiCd batteries, or a PHD+ II with three size AA rechargeable NiCd batteries, or a PHD Laser+ with one 9v alkaline battery.
- One cable—to connect the PHD to your computer.
- Telxon Corporation guide—explains the PHD unit parts and features, how to install its batteries, how to recharge them, and so on.
- The PHD+ and PHD+ II also include a battery charger for the rechargeable NiCd batteries. The recharger for the PHD Laser+ is sold separately.

The purchase price of your PHD includes a one-year warranty. Before the expiration date, you will receive a reminder to purchase the maintenance agreement for another year. Contact Follett Software Company's Technical Support if you experience problems with your PHD.

Supported barcodes

The Telxon PHDs support most of the barcodes supported by Circulation Plus and Catalog Plus with the exceptions noted below:

| Barcode Symbology | PHD+ | PHD+ II | PHD Laser+ |
|----------------------------|------|---------|------------|
| Follett Classic | X* | X* | X* |
| Generic Codabar | X | X | X |
| Codabar Mod 10 | X | X | X |
| Generic Code 39 | X | X | X |
| Code 39 Mod 10 | X | X | X |
| Code 39 Mod 11 | | | |
| Code 39 Mod 43 | | | |
| Generic Interleaved 2 of 5 | X** | X** | X** |
| Interleaved 2 of 5 A | X | X | X |
| Generic LabelCode 5 | X | X | |

* The Telxon PHDs do not support LabelCode IV, a Follett Classic symbology. The PHD Laser+ also doesn't support Follett Classic LabelCode V or Generic LabelCode 5.

** If you use Generic Interleaved 2 of 5 barcodes (non-Follett Classic), some minor modifications to the PHD application are necessary. See the following section for instructions.

Important: To scan properly, your barcodes must include a Type Identifier regardless of symbology. Follett Classic symbologies assume a Type Identifier of "P" for patron barcodes and a "T" for library materials.

See also: For more information about the barcode symbologies supported by Circulation Plus and Catalog Plus, see Appendix D, "Barcode symbologies."

Reading Generic Interleaved 2 of 5 barcodes

To enable your Telxon PHD to read the Generic Interleaved 2 of 5 barcode symbology, you must make some modifications to the PHD application:

1. Locate these 6 files (circ*.*) in the CC40\WCOMMON or \MCOMMON folder: CIRC.600, CIRC-A.600, CIRC-B.600, CIRC.932, CIRC-A.932, CIRC-B.932.
2. If you have a PHD+ or PHD+ II, use the files with the .600 extension. If you have a PHD Laser+, use the files with the .932 extension.
3. Rename CIRC.600 to CIRC.OLD or CIRC.932 to CIRC.OLD.
4. Rename CIRC-B.600 to CIRC.600 or CIRC-B.932 to CIRC.932.
5. In System Setup, download the application to your PHD.

Note: After downloading the application, when you press the **N** key on your PHD, the application version number should be 1.B-B.

Connecting a PHD to your computer

Warning: Only connect the PHD cable to the computer when the computer is turned off. This prevents a static charge or power surge from damaging or destroying your equipment or data.

To connect a Telxon PHD to your computer, use the following instructions:

1. Turn off your computer and PHD.
2. Plug the prong end of the PHD cable into your PHD's base and plug the other end of the cable (9 or 25 pin serial) into the appropriate communications port at the back of your computer.
3. Turn on your computer and your PHD.

Important: USB-only Macintosh computers will require a USB to serial port adapter. For instructions and recommendations, please see the Read Me file, which you'll find on your Follett Software CD under Extras in the USB Notes folder.

Downloading the application

Use the following steps to load the current version of the PHD application onto each PHD your library uses before you use it.

Once the application is loaded, you'll only need to repeat the process if:

- The PHD screen displays the message, "Ready to Update?"
- You upgrade to a new version of Circulation Plus/Catalog Plus.
- Your barcode symbologies change.
- You share your PHD with other libraries that use different symbologies.
- You've replaced the PHD's memory or batteries.
- You also use your PHD for TextLink and have previously loaded TextLink's PHD application. One application overwrites the other.

Important: USB-only Macintosh computers require a USB to serial port adapter. For instructions and recommendations, please see the Read Me file on your Follett Software CD, under Extras in the USB Notes folder.

1. Make certain your PHD is connected to your computer.
2. From the Site tabs in System Setup, select the PHD tab:

Select the PHD model you're using.

These instructions change based on the PHD you choose.

If the default port and speed aren't correct, click Edit and make the desired changes. For instructions, see "How to change the PHD settings" (page 43).

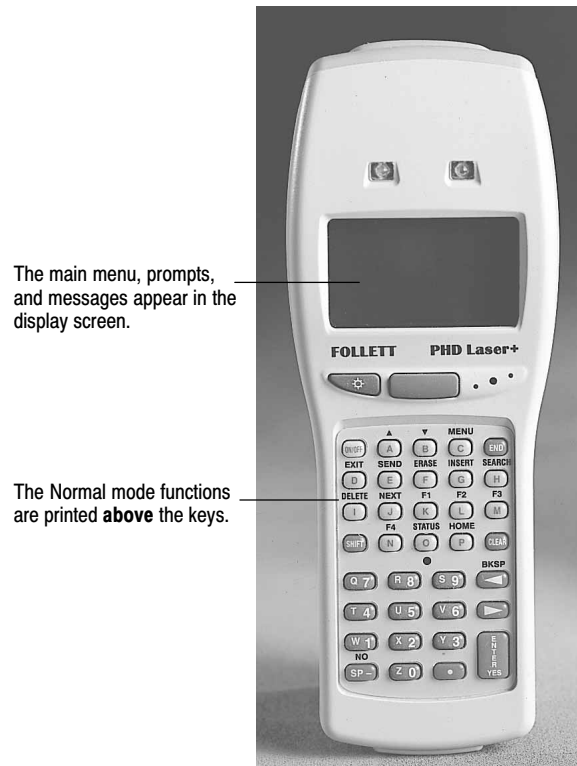
3. Once you've selected the correct PHD model and adjusted the PHD settings as desired, simply follow the instructions displayed on the dialog.

A progress dialog appears while the application is transferred to your PHD. When the process is complete, click Close to return to Site Setup.

Using a Telxon PHD

This section gives you the basic information you need to use a PHD, to enter keypad commands, and to type or scan barcodes. For instructions on using a

Telxon PHD to collect information for remote circulation, see page 661. To collect inventory, copy, or patron information, see page 663.



The Telxon PHD main menu

The PHD main menu is the starting place for all PHD operations. To access the PHD main menu, turn on the PHD by pressing the **ON/OFF** key. If the main menu doesn't appear, press **D** (Exit) until it does:

**Acq, Inv, Circ,
SEND, ERASE, END**

Important: If you haven't transferred the PHD application to your PHD (see page 655), the main menu won't appear.

Keys used most often

Of the 35 keys on the keyboard, you will typically use only 13 of them (see the following table):

Frequently used keys

| Key | Function |
|-------|---|
| ENTER | Yes |
| SP | No or Space bar |
| D | Exit |
| E | To send scanned data to the computer, from the PHD main menu, press E . |
| F | To erase the scanned data in your PHD, from the PHD main menu, press F . |
| O | When your PHD is in the Circulation or Inventory mode, press O to check how many scans are stored in your PHD. |
| ▶ | At a data entry screen, use this key to move forward to check the next scan stored in your PHD. |
| ◀ | At a data entry screen, use this key to move backwards to check the previous scan stored in your PHD. |
| CLEAR | Clears a message from the PHD screen. |
| C | From the PHD main menu, press C to change to Circulation mode. |
| I | From the PHD main menu, press I to change to Inventory mode. |
| L | To see how much memory is available in the scanner for scanned data, press L . Divide the number by 22 to determine how many scans the unit should hold. |
| N | To see which version of the PHD application is loaded in the scanner, press N . |

How to change key functions

You can change key functions by using a combination of keys. To switch to a key's alternate function, press the **SHIFT** key. In shift mode, a circumflex ($\`$) appears in the upper-left position of the display. To move out of the shift mode, press **SHIFT** again.

Example: To enter a letter, press the **SHIFT** key, press the letter you want, and then press **SHIFT** again to return to normal mode.

If your library uses patron IDs rather than patron barcodes, press **SHIFT . SHIFT** (shift, period, shift), which generates a forward slash on the PHD, and then type the patron's ID.

Note: There are no special characters on the keypad such as %, \$, +, or – for Code 39 Mod 43 barcode labels. The absence of these keys prevents you from typing the Code 39 Mod 43 barcodes with these characters.

PHD features

| Feature | How it works |
|---|--|
| Additional data entry line at end of file | <p>When you are at the end of the file, the bottom of the screen displays an empty line for entering data.</p> <p>If you try to move forward past the last entry in the file, the END OF FILE message appears.</p> <p>If you try to move backward past the first entry in the file, the BEGINNING OF FILE message appears.</p> <p>Note: Press D for EXIT to return to the data entry screen.</p> |
| Memory message | <p>When the PHD memory is full, the message MEMORY FULL appears. You cannot scan any more barcodes until you upload the current barcode list to the computer and erase the PHD file.</p> |
| Power saver | <p>Automatic off: If you do not touch the PHD+ keypad for one minute, the unit automatically turns itself off. This is a special feature designed to conserve battery power.</p> <p>Automatic return at on: The PHD remembers where it was when it went off. The next time you turn it on, the PHD returns to that point in the application.</p> |
| Scan key and backlight key (PHD Laser+ only) | <p>The PHD Laser+ has a scan key and a backlight key under the display and above the keypad.</p> |

PHD task commands

While you're in a PHD data file, use the keypad commands in the following table to do file maintenance tasks such as checking the number of barcodes scanned or making corrections before transferring the data to the computer.

PHD task commands for file maintenance

| Task | How to do it |
|--|--|
| Check the number of barcodes scanned | <p>To see how many barcodes you've scanned, press O for Status.</p> |
| Correct a typing mistake | <p>Press ◀ (Backspace) to move backwards, deleting characters as the cursor moves to the left. Correct the error before pressing ENTER.</p> <p>Note: Once you press ENTER, the barcode number is saved. It can be deleted but not changed.</p> |
| Delete a barcode number already entered | <p>At a data entry screen, press ◀ until the number you want to delete appears. Then hold down I (Delete) until you hear three beeps, indicating that the number is deleted.</p> <p>Note: To go back to a barcode you've passed, press ▶.</p> |
| Enter a barcode | <p>To enter title record barcodes, type the barcode using the keypad numbers, and then press ENTER.</p> <p>To enter patron record barcodes less than 7 digits in length, press SHIFT, press P, and then press SHIFT again. Type the barcode using the keypad numbers, and then press ENTER.</p> |

PHD task commands for file maintenance (Cont.)

| Task | How to do it |
|--|---|
| Moving backwards in a data file | Press ◀ (Backspace) to move back in the file. When you reach the beginning of the file, a message appears. Note: When you review stored barcode numbers, you cannot enter any new scans. To start scanning again, move to the end of the file or press D to exit. |
| Moving forwards in a data file | Press ▶ to move ahead or forward in the file. If you try to move forward past the last number scanned, the message appears: END OF FILE. Note: When you review sorted barcode numbers, you cannot enter any new scans. To start scanning again, move to the end of the file or press D to exit. |
| Return to the PHD main menu | Press D (Exit) until the PHD main menu appears. If you are not at the end of the file, press D (Exit) once to get there, and then press D (Exit) again to return to the PHD main menu. Note: You may exit and reenter to scan more patron or copy barcodes at any time. |

Mastering barcode scanning

Scanning barcodes is a simple operation that anyone can master. If the barcodes are placed on the outside of a copy, it's possible to scan 1,000 items in an hour. If the barcode is located inside, the scanning rate may drop to 500 an hour.

Note: If a barcode won't scan, you can type it on the PHD keypad.

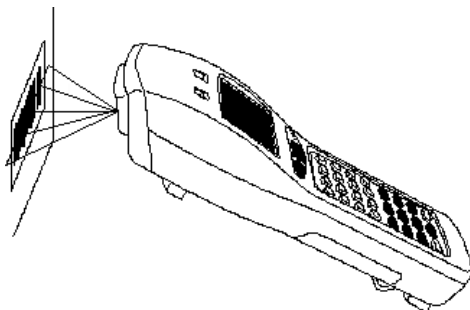
The following sections provide instructions for scanning barcodes with the different Telxon models and instructions for reversing the scan head on the PHD+ or PHD+ II.

PHD+ or PHD+ II: To scan barcodes using a PHD+ or PHD+ II scanner, remember these points:

- The PHD should just barely touch the surface. Pushing down too hard will make the scanner movement uneven, thereby impeding the reading, and possibly damage the scanner tip and barcodes.
- Move the PHD across the barcode at a **moderate** speed (a slower movement than used with the barwand scanner).
- Allow the PHD to read some white space before and after the barcode.
- Make sure the scanner tip is clean. Dirt or glue from labels will diminish scanning performance.

PHD Laser+: To scan barcodes using a PHD Laser+ scanner:

1. Point the unit at the barcode label and press the **SCAN** button. A red light emits from the scanner's head.



2. The line of light must extend beyond both ends of the barcode for the barcode to be read. To determine the optimal distance from the barcode, position the scanner about 2" from the barcode, and then gradually pull it farther away until it beeps and the red light on top flashes. Once you determine the best distance, you will be able to scan quickly and easily.

What if you're left handed?

The PHD+ and PHD+ II scan head is reversible. (The PHD Laser+ uses a broad beam and has no tip.) To reverse the scan head on the PHD+ or PHD+ II, push the buttons on both sides of the base of the scanner attachment while firmly lifting upward. Reverse the scan head, then push it back into position.

PHD scanning sounds

- A single beep sounds when you press a key or scan a barcode. (A red light opposite the scanning tip, facing the person operating the PHD, also flashes to indicate a successful scan.)
- A drawn-out "beeeep" sounds either to indicate an error in data entry or the PHD memory is almost full. If the memory is low, stop scanning as soon as possible. Mark where you are on the shelf and return to the computer to upload the file.
- Three beeps sound when you hold down a special function key (e.g., **F** for erase when erasing a file stored in the PHD) or to warn of a low battery.

Recording remote circulations

Your PHD's circulation mode lets you check out, renew, and check in copies outside your library or resource center. Before you start, make certain to complete the steps outlined in "Before recording transactions with a PHD" on page 176.

Important: Erase any old circulation data from your PHD before you start collecting new remote circulation scans (see page 664).

Starting circulation mode and setting the date

To collect remote circulation data with the PHD:

1. Turn on your PHD (see page 657). From the PHD main menu, press **C** (Circulation). A message appears asking if you want to change the date and time. If the date and time are correct, press **SP** (No) and skip to “Checking out and renewing items” below or “Checking in items” below.

Important: Circulation Desk processes transactions based on the month and day you entered them into the PHD. The year is pulled from the workstation’s system date. To ensure that your statistics are accurate, we recommend that you upload the PHD data to Circulation Desk on the same day as the transaction.

2. If you need to change the date and time, press **ENTER** (Yes). The ENTER CURRENT TIME prompt appears. Enter the correct hour and minutes, and press **ENTER** after each. At the prompt, either press **A** to indicate AM or **P** for PM. Follow the prompts to enter the current month (1-12), date (1-31), and year (0-99). Press **ENTER** after each step.

If you want to check out items, see the following section. If you need to check in items, see “Checking in items” on page 663.

Checking out and renewing items

1. To checkout or renew items, once you’ve accepted or changed the date, the CHECKOUT? prompt appears. Press **ENTER** (Yes).
2. The SCAN PATRON prompt appears. To select the patron borrowing or renewing the copies, scan or type the patron’s barcode. (After typing a barcode, press **ENTER** to save it.)

Note: If your library uses patron IDs rather than a defined barcode symbology, you can type them into your PHD by pressing **SHIFT . SHIFT** (shift, period, shift), which generates a forward slash, then typing the ID number.

3. The SCAN BARCODE prompt appears. To check out a copy to the selected patron, scan or type the copy barcode. Repeat this step for each item the current patron is checking out or renewing.

To change patrons, press **D** (Exit) and repeat steps 2 and 3 until you are finished checking out items.

If you want to switch to checkin, press **D** (Exit) until you return to the PHD main menu. Press **C** (Circulation) to re-enter circulation mode, press **SP** (No) to accept the time and date, and then continue with the following section, “Checking in items.”

When you are finished with the PHD, press **D** (Exit) until you return to the PHD main menu, and then turn off the PHD to conserve the battery charge.

Important: Transfer the data to Circulation Desk as soon as possible (page 176), and then erase the scans from your PHD (page 664).

Checking in items

1. To check in items, once you've accepted or changed the date, press **SP** (No) at the CHECKOUT? prompt, and then press **ENTER** (Yes) at the CHECKIN? prompt.
2. The SCAN BARCODE prompt appears. To check in a copy, scan or type its barcode. (After typing a barcode, press **ENTER** to save it.) Repeat this step for each copy you want to check in.

If you want to switch to checkout, press **D** (Exit) until you return to the PHD main menu. Press **C** (Circulation) to re-enter circulation mode, press **SP** (No) to accept the time and date, and then continue with the previous section, "Checking out and renewing items."

When you are finished with the PHD, press **D** (Exit) until you return to the PHD main menu, and then turn off the PHD to conserve the battery charge.

Important: Transfer the data to Circulation Desk as soon as possible (page 176), and then erase the scans from your PHD (page 664).

Collecting inventory, copy, or patron data

Your PHD's inventory mode lets you do much more than gather copy barcode scans for Inventory. You can also use the inventory mode to collect patron or copy barcodes for the PHD features in Cataloging, Patron Maintenance, and Reports.

Warning: To avoid accidentally changing or deleting the wrong records, make certain to erase any existing scans from inventory before you start collecting new scans.

To collect barcode scans for any of these PHD features:

1. Turn on your PHD (see page 657). From the PHD main menu, press **I** (Inventory).
2. The SCAN BARCODE prompt appears. Scan or type each barcode you want to enter. (After typing a barcode, press **ENTER** to save it.)

Important: To be identified as a patron or a copy barcode, it is critical that your barcodes contain a Type Identifier. When typing in patron barcodes at this prompt, if you are using Follett Classic symbologies, you must include the preceding "P". If you don't, your PHD assumes that you are entering a copy barcode.

If your library uses patron IDs rather than a defined barcode symbology, you can type them: Press **SHIFT . SHIFT** (shift, period, shift), which generates a forward slash, and then enter the ID number.

If you are finished with the PHD, press **D** (Exit) until you return to the PHD main menu, and then turn off the PHD to conserve the battery charge.

Important: If you're gathering scans for an inventory, process the scanned data as soon as possible. If you continue to circulate during an inventory, it's likely that an item you scanned may be checked out before you process the remote inventory data from the PHD. When you process the data, the exception report will notify you of any items that are checked out. Inventory does not check these items in.

See also: For instructions on transferring the data in your PHD to a particular application, see the appropriate section:

- Patron Maintenance — “Updating patron records using a PHD” (page 193), “Deleting patrons with a PHD” (page 196).
- Inventory — “Using a PHD to inventory your collection” (page 221).
- Cataloging — “Exporting bibliographic records” (page 312), “Update categories, circulation types, or copy status with a PHD” (page 338), “Remove categories from copies with a PHD” (page 340), “Delete copies with a PHD” (page 342).
- Reports — “Printing from a PHD” (page 496).

Important: After transferring the data, if you don't need the data for another process, erase the scans from your PHD (see below).

Erasing data from a PHD

As soon as you've transferred the data in your PHD to a workstation through Circulation Desk, Inventory, Cataloging, Patron Maintenance, or Reports, if you don't need the data for another process, erase the data file from your PHD.

1. Turn on your PHD (see page 657). From the PHD main menu, press **F** (Erase). The INVENTORY? prompt appears. To delete all the scans in the inventory file, press **ENTER** (Yes). Press **SP** (No) to skip the file.

Repeat this process at the ACQUISITIONS? and CIRCULATION? prompts.

Warning: To avoid accidentally changing or deleting the wrong records, make certain to erase any existing scans from inventory before you start collecting new scans.

2. The ERASE FILES? prompt appears. To delete the selected files, hold down **ENTER** (Yes) until you hear three beeps. The ERASING FILES prompt appears. The PHD main menu reappears when processing is finished. You are ready to scan another set of barcodes with the PHD.

Troubleshooting

The following table lists some of the common problems encountered while using a Telxon PHD and provides troubleshooting solutions:

Common usage problems with the Telxon PHD

| If you have this problem | Try this |
|--|--|
| Barcode won't scan. | Use the keypad to type the number (you may have to use the SHIFT key if typing letters), and then press ENTER . |
| Duplicate scans | With the PHD+/PHD+ II scanner, if you do a back and forth scan motion and hear a beep twice—or accidentally read the same material or same shelf twice—don't worry about it. There are no uses of the PHD where this might cause a problem during data processing. |
| PHD doesn't hold as many scans as it should. | Contact Follett Software Company to obtain a memory update to enable the PHD scanner to hold 4000 to 5000 scans. |
| PHD occasionally locks up or performs erratically. | Corrosion sometimes builds up on the battery contacts, causing the batteries not to charge or causing the PHD to malfunction. To correct corrosion-related problems, try the following: <ul style="list-style-type: none"> • Remove and replace the batteries. • Make sure the batteries are seated tightly. • Wipe off the battery contacts. • Gently run a nail file over the battery contacts. • Avoid touching the ends of the batteries with your fingers. |
| PHD doesn't display the message "Ready to Update." Therefore, I can't load the application. | If you are using an older PHD model, it probably contains the 56* chip. You must upgrade the PHD to the 57* chip before transferring the PHD application. To check your PHD chip: <ul style="list-style-type: none"> • Turn off the PHD and press the SP and ENTER keys. • While holding down the SP and ENTER keys, simultaneously press and release the ON/OFF key. • Continue holding the SP and ENTER keys for seven seconds. You should get a "*56>" or "*57>" message. <p>If the message is a "*56>", press and hold down the 6 key for three beeps. You need to update the EPROM chip in your unit. If the message is "*57>", hold down the 6 key for three beeps. An update menu appears. Select either 1. Ready to Update or 2. No Change. Choosing 2 will bring you back to the main menu. (Your PHD does not require the EPROM chip update.)</p> <p>If you get a 62>, 65>, 66>, 68>, or 69> message, hold down the 6 key until the unit displays "TP_." Type 59 and then press ENTER. After the download message, press the 3 key for three beeps, select either 1. Ready to Update or 2. No Change. Choosing 2 will bring you back to the main menu.</p> <p>If your PHD requires the EPROM chip update and you are covered under an Extended Maintenance Agreement (EMA), there is no cost to update the EPROM chip. For more information, please contact Customer Service for literature explaining the PHD EPROM chip.</p> |

Common usage problems with the Telxon PHD (Cont.)

| If you have this problem | Try this |
|--|---|
| Scans are sluggish. | <p>There could be several causes for sluggish scans. Try the following:</p> <ul style="list-style-type: none"> • Clean the scanner tip on the PHD+ or PHD+ II. You can pry the tip off the unit with a dime or screwdriver and clean it on the inside with a lint-free cloth and denatured alcohol. Be sure the tip is dry before replacing it on the unit. • Make sure you are holding your PHD at the correct angle. For more information, see the Telxon guides. • Make sure you are scanning some white space at the beginning and the end of each barcode scan. • Check your PHD display for messages. |
| Typing error | Press BACKSPACE to correct the error before pressing ENTER . (This key deletes characters as it moves the cursor.) |
| You get "caught" in Acquisitions mode. | <p>The acquisitions module in the software provided with your PHD was formerly used for ordering books from Follett Library Resources. If you find yourself in this application by mistake, follow these steps to return to a main menu:</p> <p>Press EXIT until you return to the PHD menu. If you encounter a YES/NO question, answer with a NO in order to exit the menu.</p> <p>If the screen has the command, "Select Printout Type Group I," press S and then ENTER.</p> <p>If the screen has the command, "What Sequence Group II," press A, then ENTER, and then EXIT.</p> <p>If the screen has the command, "Processing Group III?" press 1, then ENTER.</p> <p>If the screen has the command, "Setup Group IV," press X, N, E, and then EXIT.</p> |

The following table lists some of the common error messages encountered while using your PHD and provides troubleshooting solutions:

Telxon PHD error messages

| Message | Cause & solution |
|--|---|
| CANNOT CONNECT CANNOT LOGIN | The baud rate auto-detect failed. Check the cable connections, and then try changing the port connection. |
| ERROR OPENING XACTION FILE | The file you are trying to transfer from your PHD to the computer is empty. |
| INVALID ENTRY | <p>The response is in the wrong format; for example, an unreadable or damaged barcode. If the scanner can't read a copy's barcode, use the keypad to type the number, and then press ENTER. Use the SHIFT key if typing letters.</p> <p>If your barcodes are less than 7 digits and don't contain type identifiers, you may have to type the barcodes into your PHD. This is especially important for any reports or global editing done in Patron Maintenance. If your barcodes don't contain a type identifying character such as P space or T space, patron lists and/or global editing will not be an option using the PHD.</p> |

Telxon PHD error messages (Cont.)

| Message | Cause & solution |
|-------------|---|
| LOST DSR | Your PHD is not connected to the computer or is connected to the wrong port. Check the cable connections, and then try changing the port. |
| LOW BATTERY | The NiCd batteries need to be charged. Do this immediately! If you are using a PHD Laser+, change the 9-volt alkaline. |
| MEMORY FULL | No more barcodes can be scanned until the currently stored barcodes are transferred to the computer and the file is erased. See also: For steps describing how to erase files, see "Erasing data from a PHD" on page 664. |

Rebooting your Telxon PHD

Note: Some of the following procedures assume you are familiar with downloading application software into your PHD (page 655).

You may have to reboot your PHD if one of the following happens:

- You need to determine what type of chip is in your unit.
- You get a low battery message constantly, even after replacing or recharging your batteries.
- You want to download application software to the unit.
- The PHD+ / PHD+ II displays black squares.

If any of these conditions exist, turn off your unit. While holding down the **SP** and **ENTER** keys, press and release the **ON/OFF** key. Continue to hold the **SP** and **ENTER** keys for seven seconds. The unit will display a version of the chip being used (for example 57*>).

If you get a 56*> message, press and hold down the **6** key for three beeps. This unit cannot be used with Windows. You will need to update the EPROM chip in your unit.

Note: If your PHD requires the EPROM chip update and you are covered under an Extended Maintenance Agreement (EMA), there is no cost to update the EPROM chip. For more information, please contact Customer Service for literature explaining the PHD EPROM chip.

If you get a 57*> message, hold down the **6** key for three beeps. An update menu appears. Select either 1. Ready to Update or 2. No Change. Choosing 2 will bring you back to the main menu.

If you get a 62>, 65>, 66>, 68>, or 69> message, hold down the **6** key until the unit displays "TP_". Type 59 and then press **ENTER**. After the download message, press the **3** key for three beeps, select either 1. Ready to Update or 2. No Change. Choosing 2 will bring you back to the main menu.

Important: Rebooting a Telxon PHD will erase all scans from its memory.

Maintenance information

The PHD is a precision electronic device and must be treated with care. To ensure the longevity of your PHD, make sure you follow these guidelines.

Important: Make sure your PHD is turned off before connecting or removing any accessories, replacing the batteries, or replacing the memory chip.

Storing your PHD

When storing your PHD for more than 16 days, follow these guidelines:

- Always store your PHD with the NiCd batteries inserted. Charge the batteries, insert them into the unit, and then store in a cool place.
- During this storage time, turn the device on periodically (at least once a month) and check for a LOW BATTERY message. If you see this message, charge the batteries **immediately**.
- Protect the device from extreme heat, cold, and moisture.

Cleaning your PHD

Moisten a soft, clean, lint-free cloth with a mild, nonabrasive cleaner and wipe the outside surfaces. Take the following precautions when cleaning your PHD:

- Do not saturate the cloth used to wipe the device.
- Do not spray or pour liquids directly onto the device.
- Never use a paper towel to clean the device.

Charging and recharging batteries

We recommend you use only NiCd rechargeable batteries in the PHD+ / PHD+ II. The PHD+ requires four AAA NiCd batteries. The PHD+ II requires three AA NiCd batteries. The batteries for both devices are designed to provide power for approximately five hours of continuous use when charged properly. The PHD Laser+ comes with a 9 volt alkaline battery, but a rechargeable battery pack and recharger may be purchased from FSC. See the following section for installation instructions.

Warning: Only recharge NiCd batteries. Charging regular or reusable alkaline batteries with the Telxon charger causes them to explode.

If the device is stored in below freezing temperatures for more than one hour, do not charge the NiCd batteries until they return to room temperature.

To charge the batteries for your PHD unit, make sure the device is turned off. Connect the battery charger to the port (location and type of end vary from unit to unit). Plug the battery charger into an electrical outlet.

Charge all units for 16 hours **initially**. Thereafter charge them for a minimum of 8 hours only when the LOW BATTERY message appears. Remove the battery charger from the outlet, and then disconnect the charger from the PHD.

Installing a rechargeable battery pack

If you change from alkaline batteries to NiCd batteries in a PHD+ or PHD+ II, no modification of the unit is needed.

If you purchased the rechargeable battery pack for the PHD Laser+, please follow these instructions to install it:

1. With the unit turned off, remove the hand strap by twisting the clip at the lower end. Then, remove the battery cover.
2. Locate the white wiring harness on the lower left side. Attached to the harness are two wires connected to the battery and one that forms a loop. Grasp this loop and pull up. The harness will unplug from the unit.
3. Remove the harness, wires, and 9-volt battery from the unit.
4. Carefully remove the glued-in foam insert that surrounded the battery.
5. Place the rechargeable battery pack into the unit, making sure that it is right side up. Check to see that the battery pack is making connection with the contacts located in the bottom of the scanner.

Note: Do not remove the wrapping from the batteries.

6. Replace the battery cover and hand strap.
7. Connect the recharger to the bottom of the unit and recharge the unit for a minimum of 14 hours. The packs do not come charged from FSC. When the unit is recharging, the red light located in the middle of the keypad should be lit. This indicates that the unit is charging.
8. Keep the wiring harness and the foam insert. You may use it later if you wish to convert back to alkaline batteries.

Backup power

The PHD+ contains a lithium backup battery. When the NiCd batteries are removed, the lithium battery has a life of about 1000 hours (16 days) if the device is not turned on. We recommend you replace the lithium battery every five years.

Note: For information on replacing the lithium backup battery, contact the Follett Returns Department.

The PHD+ II and PHD Laser+ contain a super capacitor (supercap). The super capacitor provides backup power to protect the application program only long enough for the NiCd batteries to be charged. By itself, it can only sustain the PHD+ II/PHD Laser+ for 20 minutes of continuous use.

Warning: If your Telxon PHD is left without batteries for more than 20 minutes, all scans stored in it will be lost.

Disposing of old batteries

Eventually, your batteries will no longer hold a charge. For environmental safety, we recommend that you do not throw your batteries in the trash. Many companies accept used batteries and recycle them or dispose of them properly. One such company is:

Power Express
Recycling Dept.
Portola Valley, CA USA
Tel: 1-800-POWER-EX

Appendix F Using a PHD Dolphin+

A PHD (Portable Handheld Device) is a barcode scanner that collects, stores, and transmits data. You can use a PHD to simplify certain circulation, cataloging, inventory, and reporting activities. Follett Software currently supports four PHD models. This appendix provides instructions for using the PHD Dolphin+ from Hand Held® Products. It also includes a troubleshooting table and a Quick Reference Guide.

Important: This appendix is intended to complement, **not** duplicate, the Hand Held Products document that came with your PHD Dolphin+. Please keep the Hand Held Products document for future reference.

See also: For information about one of the Telxon PHDs, see Appendix E.

Getting started

If you're using your PHD Dolphin+ for the first time, make certain your package contains everything on the enclosed packing list. Your package should also include a document from Hand Held Products that provides information on the HomeBase and battery maintenance.

Once you've verified that you have everything you need, use the document from Hand Held Products to set up the HomeBase and install and charge the battery.

The HomeBase is the hub of your PHD Dolphin+ system: not only is it the communications link between your PHD and your computer — it also provides battery management. Make sure it is connected to a convenient workstation that has access to Circulation Plus/Catalog Plus.

Loading the PHD application for the first time

Before you can use your PHD, you need to load Follett Software's PHD application. This application tells your PHD which barcode symbologies your library uses and how to work with the other Follett applications.

To load the application the *first* time, place the PHD Dolphin+ in the HomeBase. If the LCD screen is blank, press the **ON/SCAN** key. The screen prompts you to go to System Setup. Use the instructions on page 42 to set up the options on the PHD tab. When you're ready, press your PHD's **ENTER** key, then click the Load button on the PHD tab.




Note: After installing the PHD application the first time, if you need to reinstall the application, simply follow the instructions on page 42.

Once you've loaded the PHD application, your PHD is ready to use.

If you also use your PHD Dolphin+ with TextLink, you must also load the PHD application from TextLink before using it with TextLink. Unlike a Telxon PHD, the two applications can reside concurrently on a PHD Dolphin+.



PHD Dolphin+ basics

With the PHD application installed, your PHD Dolphin+ should appear identical to the one pictured below. Take a moment to become familiar with the layout of the keypad and the functions of the various keys. When you're ready, see the following sections for more information about your PHD.

This symbol () shows the charge in the main battery. When the battery is low, it starts blinking. While the PHD is charging, a blinking arrow () appears; a checkmark () appears when the battery is fully charged.

Press the **ON/SCAN** key to "wake up" the PHD from sleep mode, or to scan a barcode. You can also press **ON/SCAN** to jump to the main menu from any other menu.

To switch between numeric and alpha mode, press the **SHIFT** key.

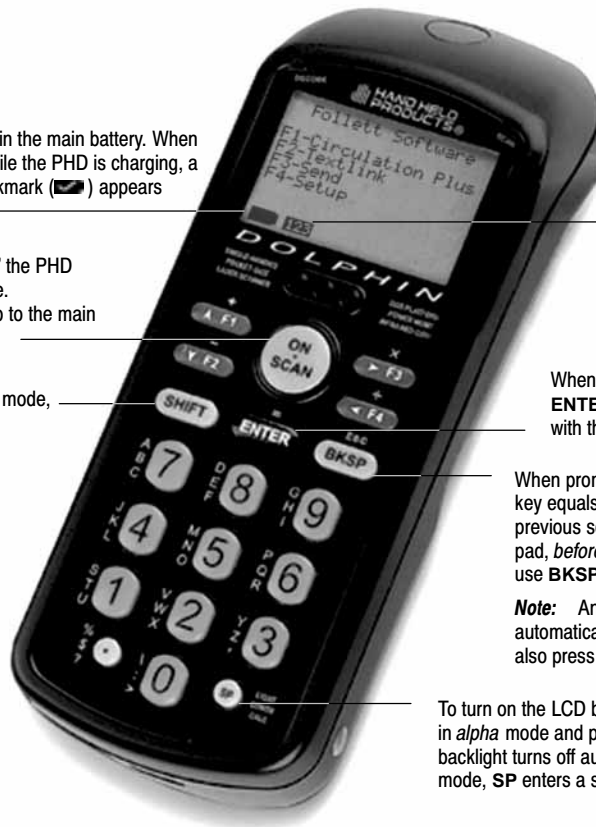
This symbol indicates which mode the keypad is in. Use the **SHIFT** key to toggle between *numeric* () and *alpha* () mode.

When prompted for a yes/no response, the **ENTER** key equals **YES**. When entering data with the keypad, press **ENTER** to save it.

When prompted for a yes/no response, the **BKSP** key equals **NO**. **BKSP** also lets you return to the previous screen. When entering data with the keypad, *before* you press **ENTER** to save it, you can use **BKSP** to back up and correct a mistake.

Note: Any error messages you receive will clear automatically after a moment. If you prefer, you can also press **BKSP** to clear the message.


To turn on the LCD backlight, press **SHIFT** to put the PHD in *alpha* mode and press **SP** once. To conserve power, the backlight turns off automatically after 60 seconds. In *numeric* mode, **SP** enters a space.



Navigating the PHD Dolphin+

Selecting the right PHD function is as easy as one, two, three, four. Starting with the main menu, shown above, every menu option is tied to a specific function key. The function keys (**F1**, **F2**, **F3**, **F4**) are located on either side of the **ON/SCAN** key. To select a menu option, just press the corresponding key.

Entering alpha and special characters

Although the keypad is designed primarily for entering numbers, you can also enter alpha and special characters. To switch from numeric to alpha mode, press the **SHIFT** key. The alpha mode symbol () appears at the bottom of the screen.

You'll notice that there are three letters or symbols to the left of each numeric key and the "." key:

- To enter the first letter or symbol next to a key, press the key once.
- To enter the second letter/symbol, press the key twice within one second.
- To enter the third letter/symbol, press the key three times within one second.

To switch back from alpha to numeric mode, press the **SHIFT** key again.

Note: The PHD Dolphin+ keypad does not support the special characters +, -, or /. The absence of these keys prevents you from typing Code 39 Mod 43 barcodes that contain these characters and from entering patron ID numbers manually.

Supported barcodes

The PHD Dolphin+ supports all the barcodes supported by Circulation Plus and Catalog Plus. For more information about the barcode symbologies supported by Circulation Plus and Catalog Plus, see Appendix D, "Barcode symbologies."

Important: To scan properly, your barcodes must include a Type Identifier regardless of symbology. Follett Classic symbologies assume a Type Identifier of "P" for patron barcodes and a "T" for library materials.

Verifying your symbologies

The barcode symbologies you set up (page 37) in System Setup are sent to your PHD when you load the PHD application (page 42). If you share your PHD with other libraries with different symbologies, you'll need to reload your application.

If you're not certain what symbologies are currently on your PHD Dolphin+, from the main menu press **F4** (Setup), then press **F1** (About) from the Setup Menu. The product information for the PHD Dolphin+ application appears. To see what symbologies are loaded, press **F4** (Barcode Info). If you're using a symbology other than Follett Classic, the line below the symbology name indicates the total length (Len) of the barcode and the Type Identifier (Id) used.

Note: Even if a particular symbology is specified for library materials or patrons, the PHD Dolphin+ will also recognize and accept Follett Classic barcodes.

Scan and battery capacity

The PHD Dolphin+ can store up to 4,000 scans for *each* feature (i.e., Circulation, Inventory, Patrons, and Copies) in the PHD application. However, we recommend that you upload the scans to a workstation after gathering about 1,200 to minimize any possible loss due to mechanical or user error.

With a full battery charge, you can use your PHD Dolphin+ for up to 20 hours. However, to maintain this level of performance, you must follow the battery maintenance guidelines provided in the Hand Held Products document that came with your PHD Dolphin+.

Collecting circulation information

Circulation mode lets you check out, renew, and check in copies outside your library or resource center. Before you start, make certain to complete the steps outlined in “Before recording transactions with a PHD” on page 176.

Important: Circulation Desk processes transactions using the month and day you entered them into the PHD. The year is based on the workstation’s system date. To ensure accurate statistics, we recommend uploading the PHD data to Circulation Desk on the day of the transaction.


To enter circulation mode, from the main menu press **F1**. The Circulation Plus menu appears. Press **F1** again to open the Library Circulation menu. From the Library Circulation menu you can:

- Check in items. See the following section.
- Check out or renew items. See page 675.
- Review your circulation scans. See page 678.
- Erase your circulation scans. See page 679.

Important: Before collecting new circulation scans, make certain to erase the circulation data you have already processed (see page 679).

Checking in items

1. To check in items using your PHD, select **F1** (Check In) from the Library Circulation menu. A message appears asking you to confirm the system date and time. If the date and time are correct, press **BKSP** (No) and skip to step 3.
2. If you need to change either the date or time, press **ENTER** (Yes). The Date Entry screen appears, with the current system month. If it’s correct, press **ENTER**. If incorrect, use **BKSP** to position the cursor, make the necessary changes, and then press **ENTER**. Repeat this process for the remaining date and time fields. At the prompt, press **F2** to indicate AM or **F4** for PM.

Note: When entering the date or time, the keypad must be in numeric mode (). If it isn’t, press the **SHIFT** key to switch modes.

When the date and time are correct, press **BKSP** (No) to continue.

3. The Library Check In screen appears. To check in an item, scan by pressing the **ON/SCAN** key, or type its barcode. (After typing a barcode, press **ENTER** to save it.) Repeat this step for each item.


Note: The Library Check In screen displays the barcode of the last item you checked in. If you get called away or need to switch to a different PHD feature, this lets you pick up where you stopped.

To leave the Library Check In screen, press **BKSP**. When you are finished collecting scans, return the PHD Dolphin + to the HomeBase.

Important: Transfer the scans to Circulation Desk as soon as possible (page 176), and then erase the scans from your PHD (page 679).

Checking out and renewing items

1. To check out or renew items using your PHD, select the **F2** option (Check Out) from the Library Circulation menu. A message appears asking you to confirm the system date and time. If the date and time are correct, press **BKSP** (No) and skip to step 3.
2. If you need to change either the date or time, press **ENTER** (Yes). The Date Entry screen appears, with the current system month. If it's correct, press **ENTER**. If incorrect, use **BKSP** to position the cursor, make the necessary changes, and then press **ENTER**. Repeat this process for the remaining date and time fields. At the prompt, press **F2** to indicate AM or **F4** for PM.

Note: When entering the date or time, the keypad must be in numeric mode (). If not, press the **SHIFT** key to switch modes.

When the date and time are correct, press **BKSP** (No) to continue.

3. The Library Check Out screen appears. Scan, by pressing the **ON/SCAN** key, or type the barcode for the patron who is borrowing or renewing items. (After typing a barcode, press **ENTER** to save it.)
4. After you enter the patron's barcode, you're prompted to enter an item barcode. Scan or type the barcode of each item the patron wants.

Once you've entered the first item barcode for a patron, you can enter another item *or* switch to another patron by entering a patron's barcode.

Important: To be identified as a patron or a copy barcode, it is critical that your barcodes contain a Type Identifier. When typing in patron barcodes at this prompt, if you are using Follett Classic symbologies, you must include the preceding "P". If you don't, your PHD assumes that you are entering a copy barcode.

Note: The Library Check Out screen displays the last barcode you entered. If you get called away or need to switch to a different PHD feature, this allows you to pick up where you stopped. Please note that if you enter a patron barcode but don't check out any items for the patron, the patron's barcode is not saved.

To leave the Library Check Out screen, press **BKSP**. When you are finished collecting scans, return the PHD Dolphin+ to the HomeBase.

Important: Transfer the scans to Circulation Desk as soon as possible (page 176), and then erase the scans from your PHD (page 679).

Collecting inventory scans

You can use your PHD's inventory mode to gather copy barcode scans for Inventory. Using a PHD eliminates the extra work of bringing the books to a workstation, thereby decreasing your overall inventory time.

To enter inventory mode, from the main menu press **F1**. The Circulation Plus menu appears. Press **F2** to open the Library Inventory menu. From the Library Inventory menu you can:

- Scan items for Inventory. See the following steps.
- Review your inventory scans. See page 678.
- Erase your inventory scans. See page 679.

Important: Before collecting new inventory scans, make certain to erase the inventory scans you have already processed.

1. To collect inventory scans with your PHD, select the **F1** option (Scan Items) from the Library Inventory menu. The Library Inventory screen appears.
2. Scan (press the **ON/SCAN** key) or type the barcode of each item you want to enter into Inventory. (After typing a barcode, press **ENTER** to save it.) Remember, if you scan the items in the order you find them on the shelves, Inventory can check your shelf order when you process the data.

Note: The Library Inventory screen displays the barcode of the last item you entered. If you get called away or need to use a different PHD feature before processing the scans, this lets you pick up where you stopped.

When you are finished collecting scans, press the **BKSP** key to exit the scanning mode; then return the PHD Dolphin+ to the HomeBase for processing.

Important: Process your inventory scans as soon as possible (see "Using a PHD to inventory your collection" on page 221). If you circulate during an inventory, it's likely items you scanned will be checked out before you process the remote inventory data. Once you've processed your inventory scans, erase them from your PHD (page 679).

Collecting patron barcodes

You can use your PHD's patron mode to gather patron barcodes for maintenance or reporting purposes. A PHD lets you collect and process patron records that may not have anything else in common, thereby reducing your overall effort.

To enter patron mode, from the main menu press **F1**. The Circulation Plus menu appears. Press **F3** to open the Patrons Menu. From the Patrons Menu you can:

- Scan patrons for Patron Maintenance or Reports. See the following steps.
- Review your patron scans. See page 678.
- Erase your patron scans. See page 679.

Warning: To avoid accidentally changing or deleting the wrong patron records, make certain to erase any existing patron scans before you start collecting new scans.

1. To collect patron scans with your PHD, select the **F1** option (Scan Patron) from the Patrons Menu. The Scan Library Patron screen appears.
2. Scan by pressing the **ON/SCAN** key, or type the barcode of each patron you want. (After typing a barcode, press **ENTER** to save it.)

Note: The Scan Library Patron screen displays the last patron barcode you entered. If you get called away or need to use a different PHD feature before processing the scans, this lets you pick up where you stopped.

To leave the Scan Library Patron screen, press **BKSP**. When you are finished collecting scans, return the PHD Dolphin + to the HomeBase.

See also: To transfer the scans in your PHD to a particular application, see the appropriate section: “Updating patron records using a PHD” (page 193), “Deleting patrons with a PHD” (page 196), or “Printing from a PHD” (page 496).

Important: After transferring the data, if you don’t need the data for another process, erase the scans from your PHD (page 679).

Collecting copy barcodes

You can use your PHD’s copy mode to gather copy barcodes for exporting MARC records, editing copies, or creating reports. A PHD lets you process copy records that may not have anything else in common, thereby reducing your overall effort.

To enter copy mode, from the main menu press **F1**. The Circulation Plus menu appears. Press **F4** to open the Copies Menu. From the Copies Menu you can:

- Scan copies for Cataloging maintenance or Reports. See the following steps.
- Review your copy scans. See page 678.
- Erase your copy scans. See page 679.

Warning: To avoid accidentally changing or deleting the wrong copy records, make certain to erase any existing copy scans before you start collecting new scans (see page 679).

1. To collect copy scans with your PHD, select the **F1** option (Scan Copies) from the Copies Menu. The Scan Copies screen appears.
2. Scan, by pressing the **ON/SCAN** key, or type the barcode of each copy you want. (After typing a barcode, press **ENTER** to save it.)

Note: The Scan Copies screen displays the last copy barcode you entered. If you get called away or need to use a different PHD feature before processing your scans, this lets you pick up where you stopped.

To leave the Scan Copies screen, press **BKSP**. When you are finished collecting scans, return the PHD Dolphin + to the HomeBase.

See also: To transfer the scans in your PHD to a particular application, see the appropriate section:

“Exporting bibliographic records” (page 312),

“Update categories, circulation types, or copy status with a PHD” (page 338),

“Remove categories from copies with a PHD” (page 340),

“Delete copies with a PHD” (page 342), and

“Printing from a PHD” (page 496).

Important: After transferring the data, if you don’t need the data for another process, erase the scans from your PHD (page 679).

Examining barcode scans

In certain situations, you may want to review the barcode scans stored in your PHD. You may have missed a section while taking inventory scans or checked out an item to a restricted patron. Maybe you want to see the number of scans in your PHD so you’ll know whether you should upload them now or after the next section. Whatever the situation, one of the following options should provide you with exactly the information you need.

Reviewing or deleting individual scans

To step through the barcodes that are stored for a particular feature, go to that feature’s menu and press **F3** (Review scans). The Review Scans screen first displays the *last* barcode you entered. Press **F1** to see the previous barcode, **F2** to see the next one. A message alerts you when you reach the beginning or end of the file.

To delete a particular scan from your PHD, locate the barcode and press **F4**. A message appears asking you to confirm your choice. To delete the scan, press **ENTER** (Yes). After deleting the scan, the PHD displays a brief confirmation.

Note: If you’re reviewing Library Circulation scans, you’ll notice that each barcode is identified by type:

- Check In—Items checked in.
- Patron—Patrons that checked out or renewed items.
- Item—Items (copies) checked out or renewed.

To avoid orphaned transactions, you cannot delete patron barcodes from the Review Library Circ screen. If you need to undo a transaction, delete the “Item” scans that follow the patron’s barcode. The PHD automatically removes the patron’s barcode when you delete their last item.

Viewing scan counts

If you want to see the number of scans being stored for each feature, from the main menu, press **F4** (Setup), then press **F1** (About) from the Setup Menu. The

product information for the PHD Dolphin+ application appears. Press **F3** (Scan Counts) to see the number of scans in of each feature.

Important: The PHD Dolphin+ can store up to 4,000 scans for *each* feature.

However, we recommend that you upload the scans to a workstation after gathering 1,200 for a feature to minimize any possible loss due to mechanical or user error.

Erasing scans

As soon as you've sent the barcode scans in your PHD to a workstation, if you don't need them for another process, we recommend that you erase them from your PHD. The PHD Dolphin+ provides you with two options for erasing scanned barcodes:

- To erase *only* the barcode scans for a particular feature, go to that feature's menu and press **F4** (Erase <FEATURE> scans). A message appears asking you to confirm your choice. To delete the scans for the feature, press **ENTER** (Yes). After deleting the scans, the PHD displays a brief confirmation.
- To erase *all* the barcode scans in your PHD, from the main menu press **F4** (Setup), then press **F4** (Utilities) from the Setup Menu. The Utilities Menu appears. Press **F4** (Erase ALL scans). A message appears asking you to confirm your choice. To delete all the scans in your PHD, press **ENTER** (Yes). After deleting all the scans, the PHD displays a brief confirmation.

Troubleshooting

When attempting to send scans from, or load the application to, the Dolphin, error messages may appear in the computer window, the Dolphin LCD screen, or the Dolphin File Transfer dialog (on the computer). The following table contains some of the error messages that may appear and the procedure to follow. It also includes instructions for rebooting your Dolphin. Rebooting the Dolphin or loading the application does *not* erase any scans stored in the Dolphin.

| Message | Cause / Solution |
|--|--|
| Bytes: Blocks: Errors: <number> MSG: Timeout (on the Dolphin screen) | The Dolphin is attempting to contact the Follett application but is receiving no reply. You may not have clicked Update, Delete, Proceed, Load, or Download on the computer after pressing F3 -Send on the Dolphin. Click the button on the computer window while the Errors counter is still incrementing. Or, a physical connection does not exist. Check all hardware connections. |
| C:\> (on the Dolphin screen) | The loading of the PHD application did not complete. Reboot the Dolphin by simultaneously pressing and releasing the ON SCAN , SHIFT , and BKSP keys. If the message to load the application appears, do so. If the main menu appears, you can resume normal use. If another C:\> appears, follow the instructions for DOS0011: Invalid Format below. |

| Message | Cause / Solution |
|--|--|
| <p>Could not open the PHD+ program file. (on the computer window)</p> | <p>The Follett application attempted to contact the Dolphin to load the application, but received no reply.</p> <p>You may not have pressed the correct key on the Dolphin to load the PHD application. Press ENTER for a first-time application load, or F3-Update Software on the Setup menu on subsequent loads. In either case, also click Load on the PHD tab.</p> |
| <p>DOS0011: Invalid Format (on the Dolphin screen)</p> | <p>The REMOTE.EXE file (one of the files transferred to the PHD Dolphin+ during the application load) is either incomplete or missing.</p> <ol style="list-style-type: none"> 1. If necessary, press SHIFT to change to alpha mode. 2. Type DEL <SP> REMOTE at the C:\> prompt. 3. Change to numeric mode. Type . (a period). 4. Change to alpha mode. Type EXE. The full command should now be DEL REMOTE.EXE 5. Press the Enter key. The C:\> prompt appears. 6. Reboot the Dolphin by simultaneously pressing and releasing the ON SCAN, SHIFT, and BKSP keys. A message to load the application appears. 7. On your computer, open the System Setup Site PHD tab. 8. Click Load on the PHD tab, and press Enter on the Dolphin to load the application. |
| <p>File not transferred! (on the Dolphin File Transfer dialog)</p> | <p>The Follett application attempted to contact the Dolphin but received no reply. Click Exit on the Dolphin File Transfer dialog to close it.</p> <p>You may not have pressed F3-Send after clicking Update, Proceed, or Load on the computer. Retry: Click the button on the computer and press F3 on the Dolphin.</p> <p>Or, a physical connection does not exist. Check your PHD settings and all hardware connections. When retrying, "Docked" should appear underneath your PHD settings (e.g., Com1-9600) on the Dolphin File Transfer dialog. "Empty" indicates that there is no connection.</p> |
| <p>Waiting for device (on the Dolphin File Transfer dialog)</p> | <p>The Follett application is attempting to contact the Dolphin but is receiving no reply.</p> <p>You may not have pressed F3-Send on the Dolphin after clicking Update, Download, Delete, Proceed, or Load on the computer. Press F3 on the Dolphin.</p> <p>Or, a physical connection does not exist. Check your PHD settings and all hardware connections. When retrying, "Docked" should appear underneath your PHD settings (e.g., Comx-9600) on the Dolphin File Transfer dialog. "Empty" indicates that there is no connection.</p> |

| Message | Cause / Solution |
|---|---|
| <p>The end of file was reached. (on an exception report or the computer window)</p> | <p>The Follett application contacted the Dolphin but no scans were transferred. "File not transferred!" and/or "Waiting for device" may have appeared on the Dolphin File Transfer dialog. There are several possible causes:</p> <p>A path statement in the server's Dcomm.ini file is wrong. "DownloadDir=" must be followed by either the UNC or shared drive path to the CC40\TEMP folder. Discover the correct path by running a Help About Information report; scroll down to "Contents of \???\CC40 Directories"; copy this path; paste it behind "DownloadDir=" and add "\Temp".</p> <p>Example: "Contents of \\Libraries\CC40\ Directories" will produce "DownloadDir=\\Libraries\CC40\Temp".</p> <p>Or, you do not have rights to the CC40\Temp directory. See your system administrator. Rights and permissions are outlined in our Installation Guide.</p> <p>Or, there are no scans in the correct memory area of the Dolphin (e.g., the Dolphin was in F4-Copies instead of F2-Inventory when scanning). To check the location of the scans, from the main menu, press F4, F1, and F3 in succession.</p> <p>Or, there is a very large number of scans in the Dolphin and you loaded the PHD application from an older version of Circulation Plus/Catalog Plus. Load the application again (the scans will not be erased) and resend the scans.</p> <p>Or, you may not have pressed F3-Send after clicking Update, Proceed, or Load on the computer. Retry: Click the button on the computer and press F3 on the Dolphin.</p> |
| <p>Note: The COMM light on the HomeBase lights during any communication. It flashes green when attempting to connect to the computer and red or orange when a connection has been made. On the Dolphin File Transfer dialog, "Docked" or "Empty" indicates whether a connection exists or not.</p> | <p>To Reboot the Dolphin: Simultaneously press and release the ON SCAN, SHIFT, and BKSP keys.</p> |

PHD Dolphin+ Quick Reference Guide

Important Keys

ON SCAN

This key serves three purposes:

- Turns on the PHD Dolphin+
- Triggers the laser when in scanning mode
- Returns you to the Main Menu when not in scanning mode

BKSP

This key serves three purposes:

- Backspaces when in scanning mode
- Acts as the **NO** key
- Acts as the **ESC** key to return you to the previous menu

ENTER

This key acts as the **YES** key.

F1, F2, F3, and F4

Use these function keys to select the menu options presented on the PHD Dolphin+ display screen.

SHIFT

This key toggles the yellow number keys between alpha and numeric modes.



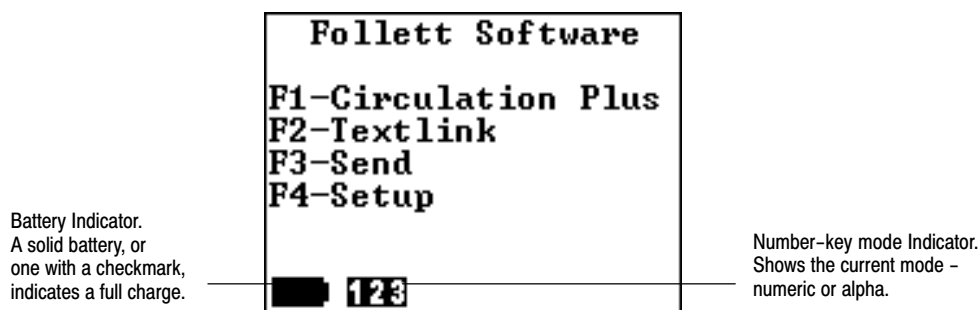
When the number keys are in numeric mode, this symbol appears in the lower left corner of the screen. If you press a number key, that number is entered on the screen.



When the number keys are in alpha mode, this symbol appears in the lower left corner of the screen. If you press a number key once, the first letter appears on the screen; twice, the second letter; three times, the third letter.

There is no **OFF** key. The PHD Dolphin+ automatically turns itself off after about a minute of inactivity.

PHD Dolphin+ Main Menu



There are two ways to return to the Main Menu:

- Press the **ON SCAN** key when not in scanning mode.
- Press the **BKSP** key repeatedly.

Procedures

In this section are the procedures, in abbreviated form, that you can perform using the PHD Dolphin+.

Note: Before performing any of these procedures, charge the PHD Dolphin+ in the HomeBase for at least six hours, and erase any pre-existing scans from the PHD Dolphin+.

Loading the PHD Dolphin+ application

On the computer:

1. Open System Setup | Setup | Site.
2. Click the PHD tab.
3. Select the PHD Dolphin+ radio button.
4. Check your PHD settings.

On the PHD Dolphin+:

5. Insert the PHD Dolphin+ into the HomeBase.
6. From the Main Menu, press **F4-Setup**.
7. Press **F3-Update Software**.

On the computer:

8. Click Load.

The application may take 4–5 minutes to fully load. Do not remove the PHD Dolphin+ from the HomeBase until the Main Menu reappears.

Entering scans into Inventory with the PHD Dolphin+

On the computer:

1. Open Inventory.
2. Click the Remote button on the toolbar.
3. Select the PHD Dolphin+ radio button.
4. Make any other desired on-screen selections.

On the PHD Dolphin+:

5. From the Main Menu, press **F1**-Circulation Plus.
6. Press **F2**-Inventory.
7. Press **F1**-Scan Items.
8. Scan the copy barcodes by pressing **ON SCAN** to trigger the laser.
9. Press **BKSP** to exit scanning mode.
10. Press **ON SCAN** to return to the Main Menu.
11. Insert the PHD Dolphin+ into the HomeBase.
12. Press **F3**-Send.

On the computer:

13. Click Proceed.

Creating reports using patron or copy barcodes

You can generate the following reports using the PHD Dolphin+:

- Bibliography Report
- Title List
- Patron Barcode List
- Patron Cards
- Patron Name List

On the computer:

1. Open Reports.
2. Select the desired report.
3. Select either Titles via PHD or Patrons via PHD in the Select by: list.
4. Click Print Preview, Print to File, or Print.
5. Select the PHD Dolphin+ radio button.

On the PHD Dolphin+:

6. From the Main Menu, press **F1**–Circulation Plus.
7. Press **F3**–Patrons or **F4**–Copies, depending on your desired report.
8. Press **F1**–Scan Copies (or Patrons).
9. Using the **ON SCAN** button, scan the barcodes of the copies (or patrons) to be included in the report.
10. Press **BKSP** to exit scanning mode.
11. Press **ON SCAN** to return to the Main Menu.
12. Insert the PHD Dolphin+ into the HomeBase.
13. Press **F3**–Send.

On the computer:

14. Click Download.

Updating or deleting patron records via the PHD Dolphin+

You can edit the following six patron record fields using the PHD Dolphin+:

- Patron status
- Patron type
- Location 1 or 2
- User Field 1 or 2

You can also delete patron records using the PHD Dolphin+.

On the computer:

1. Open Patron Maintenance.
2. From the Edit menu, select one of the following:
Update via PHD
Delete Patrons via PHD
3. Select the PHD Dolphin+ radio button.
4. Make any other desired on-screen selections.
5. Click Update (or Delete).

On the PHD Dolphin+:

6. From the Main Menu, press **F1**-Circulation Plus.
7. Press **F3**-Patrons.
8. Press **F1**-Scan Patron.
9. Using the **ON SCAN** button, scan the barcodes of the patrons to be edited or deleted.
10. Press **BKSP** to exit scanning mode.
11. Press **ON SCAN** to return to the Main Menu.
12. Insert the PHD Dolphin+ into the HomeBase.
13. Press **F3**-Send.

On the computer:

14. Click Yes to the message, "Update (or Delete) these patrons?"

Exporting MARC records via the PHD Dolphin+

On the computer:

1. Open Cataloging.
2. From the File menu, select Export MARC 21/852 Holdings Format | via PHD.
3. Select the PHD Dolphin+ radio button.
4. Select the desired check boxes.

On the PHD Dolphin+:

5. From the Main Menu, press **F1**–Circulation Plus.
6. Press **F4**–Copies.
7. Press **F1**–Scan Copies.
8. Using the **ON SCAN** button, scan the barcodes of the copies to be exported.
9. Press **BKSP** to exit scanning mode.
10. Press **ON SCAN** to return to the Main Menu.
11. Insert the PHD Dolphin+ into the HomeBase.
12. Press **F3**–Send.

On the computer:

13. Click Export.
14. Choose the file name and location.
15. Click Save.

Updating copy records via the PHD Dolphin+

The following copy record fields may be edited using the PHD Dolphin+:

- Circulation Type
- Category
- Copy Status

On the computer:

1. Open Cataloging.
2. From the Edit menu, select Update Copies via PHD.
3. Select the PHD Dolphin+ radio button.
4. Select the desired update options.
5. Click Update.

On the PHD Dolphin+:

6. From the Main Menu, press **F1**–Circulation Plus.
7. Press **F4**–Copies.
8. Press **F1**–Scan Copies.
9. Using the **ON SCAN** button, scan the barcodes of the copies to be edited.
10. Press **BKSP** to exit scanning mode.
11. Press **ON SCAN** to return to the Main Menu.
12. Insert the PHD Dolphin+ into the HomeBase.
13. Press **F3**–Send.

On the computer:

14. Click Yes to the message, “Update these copies?”

Removing categories from copy records via the PHD Dolphin+

On the computer:

1. Open Cataloging.
2. From the Edit menu, select Remove Category via PHD.
3. Select the PHD Dolphin+ radio button.
4. Select the category to be removed.
5. Click Remove.

On the PHD Dolphin+:

6. From the Main Menu, press **F1**–Circulation Plus.
7. Press **F4**–Copies.
8. Press **F1**–Scan Copies.
9. Using the **ON SCAN** button, scan the barcodes of the copies that will have the category removed.
10. Press **BKSP** to exit scanning mode.
11. Press **ON SCAN** to return to the Main Menu.
12. Insert the PHD Dolphin+ into the HomeBase.
13. Press **F3**–Send.

On the computer:

14. Click Yes to the message, “Remove category from these copies?”

Deleting copy records via the PHD Dolphin+

1. Open Cataloging.
2. From the Edit menu, select Delete Copies via PHD.
3. Select the PHD Dolphin+ radio button.
4. Select the check box, if desired.
5. Click Delete.

On the PHD Dolphin+:

6. From the Main Menu, press **F1**–Circulation Plus.
7. Press **F4**–Copies.
8. Press **F1**–Scan Copies.
9. Using the **ON SCAN** button, scan the barcodes of the copies to be deleted.
10. Press **BKSP** to exit scanning mode.
11. Press **ON SCAN** to return to the Main Menu.
12. Insert the PHD Dolphin+ into the HomeBase.
13. Press **F3**–Send.

On the computer:

14. Click Yes to the message, “Delete these copies?”

Circulating with the PHD Dolphin+

1. Open Circulation Desk.
2. Click the Remote Circ button on the toolbar.
3. Select the PHD Dolphin+ radio button.
4. Make all other desired on-screen selections.

On the PHD Dolphin+:

5. From the Main Menu, press **F1**–Circulation Plus.
6. Press **F1**–Circulation.
7. Press **F1**–Check In or **F2**–Check Out.
8. Press **ENTER** if you need to change the date, or **BKSP** if you do not.
9. Using the **ON SCAN** button, scan the patron and copy barcodes as prompted.
10. Press **BKSP** to exit scanning mode.
11. Press **ON SCAN** to return to the Main Menu.
12. Insert the PHD Dolphin+ into the HomeBase.
13. Press **F3**–Send.

On the computer:

14. Click Proceed.

Erasing scans in the PHD Dolphin+

You can erase scans from just one feature (Circulation, Inventory, Patron, or Copies) at a time, or erase all the scans at the same time.

To erase scans from one feature only:

1. From the Main Menu, press **F1**–Circulation Plus.
2. Select the feature whose scans you want to delete: **F1**, **F2**, **F3**, or **F4**.
3. Press **F4**–Erase (CIRC, INV, PAT, or COPY) scans.
4. Press **ENTER** to confirm that you wish to delete them.

To erase all scans in all four features at the same time:

1. From the Main Menu, press **F4**–Setup.
2. Press **F4**–Utilities.
3. Press **F4**–Erase ALL Scans.
4. Press **ENTER** to confirm that you wish to delete all the scans.

Determining the number of scans in the PHD Dolphin+

To see how many scans are in the memory of each feature of the PHD Dolphin+:

1. From the Main Menu, press **F4**–Setup.
2. Press **F1**–About.
3. Press **F3**–Scan Counts.

Appendix G The Bar Tender

The Bar Tender for Windows can be used to replace missing or damaged barcode labels and to print patron barcode labels. After installing The Bar Tender with the instructions in The Bar Tender for Windows reference manual, the following information will help you define the page layout and barcode information, print sequential barcodes, and print patron barcode labels.

Setting up The Bar Tender

Before you can print barcodes with The Bar Tender, you need to define the layout of your label stock and decide what information should appear on the labels.

Specifying the label stock layout



From The Bar Tender main menu, choose File | Page Setup, or choose the Page Setup icon from the toolbar. The Page Setup dialog appears. Define your label stock's paper size, orientation, margins, and labels. The labels in the Preview group box change to reflect your definition. Click OK.

Note: If you've purchased stock from Follett Software Company, use the following specifications:

Page setup for Follett Software label stock

| Page Setup field | | Follett label stock |
|------------------|--------------|---------------------|
| Paper size | | Letter 8.5 x 11 in. |
| Orientation | | Portrait |
| Margins | Top | .500 in. |
| | Bottom | .500 in. |
| | Left | .312 in. |
| | Right | .312 in. |
| Label | Width | 2.625 in. |
| | Height | 1.000 in. |
| | Vert. Repeat | 1.000 in. |
| | Columns | 3 across |

Editing the barcode label contents



To add a barcode to your label, from The Bar Tender main menu, choose Create | Bar Code, or choose the Create Bar Code icon from the toolbar. Click in the label viewing area of the main window. A barcode appears on the label. Reposition the barcode, if necessary, so that it is centered on the label.

Note: If you want to add the library name to the label, move the barcode toward the bottom portion of the label.

Defining the barcode

1. To define the barcode specifications, double-click on the barcode or choose **Modify | Selected Object**. From the **Modify Selected Bar Code Object** dialog, select the **Bar Code** tab, and then choose a symbology from the **Symbology** drop-down list.

Note: If you're using labels from Follett Software Company, under **Dimensions**, change the X dimension to 9.2 mils and set the **Ratio** to **Auto**. This reduces the size of the barcode, allowing other text to be added to the labels.

Comparison of Follett and The Bar Tender barcode symbologies

| System Setup symbologies | The Bar Tender symbologies |
|-----------------------------------|--|
| Follett Classic | Any symbology 7 digits or less: Regular Code 39 (without a check digit) recommended |
| Code 39 Mod 10 | Regular Code 39 with Unison Mod 10 check digit |
| Code 39 Mod 11 | Currently not supported |
| Code 39 Mod 43 | Regular Code 39 with Mod 43 check digit |
| Interleaved 2 of 5 A | Currently not supported |
| Codabar Mod 10 | Currently not available with Mod 10 check digit |
| Generic Code 39 | Regular Code 39 |
| Generic Interleaved 2 of 5 | Interleaved 2-of-5 |
| Generic Codabar | Codabar |
| Generic LabelCode 5 | Currently not supported |

If you're using a check digit, select the **Check Digit** check box, and then choose your check digit type from the drop-down list (**Unison Mod 10** or **Mod 43** are the most common types used).

2. Select the **Data Source** tab. Enter the beginning barcode number in the **Screen Data** text field (e.g., **T 1001**), and set the **Data Source** option to **Screen Data**.

To print a range of barcodes, check the **Serialize** check box. To specify how you would like the barcode numbers to serialize, click **Serialize Options**. After completing your barcode specifications, click **OK**.

Adding text to the label



1. To add text, such as your library's name, to the barcode label, from **The Bar Tender** main menu, choose **Create | Text**, or choose the **Text** icon from the toolbar. Click on the label above the barcode. The text field appears on the label as "Text Data."

2. To modify the text field's size and contents, double-click on Text Data or choose Modify | Selected Object. From the Modify Selected Text Object dialog, select the Font tab. If the text field is too large to fit on the label, reduce the font size—point size 9 will probably work best, but you can experiment with different font sizes and typefaces.
3. Select the Data Source tab. Enter your library name, or whatever you want to print on the label, in the Screen Data text field, and set the Data Source option to Screen Data. After completing your text modifications, click OK.

You may need to reposition the text on the label. If necessary, you can go back to the Modify Selected Text Object dialog and make additional changes.

Printing sequential barcode labels



1. After completing your setup, from The Bar Tender main menu, choose File | Print, or choose the Print icon from the toolbar. The Print dialog appears. To define the desired printer and paper source, click on Printer Setup. If you are printing one page at a time, it may be easier to set the source to manual feed. To save your printer setup, click OK.
2. If you are printing a sequential list, make sure the Use Input Data File check box is not selected. Define the range of the labels you want to print by setting the Identical Copies of Label to **1** and the Number of Serialized Labels to **30**.
3. To begin printing labels, click Print.

Saving sequential barcode setup

After printing sequential barcode labels, you will want to save your setup. If you use this file the next time you print sequential labels, The Bar Tender will start with the number at which it left off.

To save this label setup, from The Bar Tender main menu, choose File | Save, or choose the Save icon from the toolbar. Save the file with a name you will remember (e.g., TITLE.BTW or CODE39.BTW).

Printing patron barcode labels

Since some of the setup options for the patron barcode labels are the same as the setup for sequential barcode labels, you can use the file you just created as a basis for your new setup.

1. Open the file you saved in "Saving sequential barcode setup." From The Bar Tender main menu, select File | Save As and create a new file name, such as PATRONS.BTW.
2. To modify the barcode, double-click on the barcode or choose Modify | Selected Object. From the Modify Selected Bar Code Object dialog, select the Data Source tab. Set the Data Source option to Input File Data and set the Use Data Field # to **1**. After verifying that the Serialize check box isn't selected, click OK.

3. To select and setup the patron file you want to use, from The Bar Tender main menu, select File | Input Data File Setup. From the Input Data File Setup dialog, set the Type option to Text File. In the Data Selection group box, click Select. The Specify Data File dialog appears.
4. Set the List Files of Type to All [*.*], and then change the Drives option to the location of the patron export file you wish to input.

See also: Patron export files are created in Patron Maintenance. For more information, see Chapter 18, “Exporting patron records.”

Under File Name, select the patron export file you want to print, and then click OK. The Input Data File Setup dialog reappears.

5. To view the records you have selected, click View Selected Records. The first record in the View Select Records dialog is the leader from the patron file, usually the library name. The rest of the list contains the patron numbers you want to print. (The last name is in Field 3, and the first name is in Field 4. All fields can be viewed by scrolling to the right in the dialog.) After verifying the records are correct, click OK.
6. To prevent the patron file header record from printing, in the Data Selection group box, change the Record Selection drop-down list to Range, and then click Options. From the Record Range Options dialog, change the Starting Record # to **2**, and then click OK.

To Print these labels with just the library name and the patron barcode number, go to step 8. To add patron names to the barcode labels, continue with step 7.

7. Add a text field using the steps for “Adding text to the label” on page 694. Modify the font size of the text field as necessary. To specify the contents of the text field, from the Modify Selected Text Object dialog, select the Data Source tab. Set the Data Source option to Input File Data. To display the patron’s last name, set the Use Data Field # to **3**. After completing your text modifications, click OK. To add the patron’s first name to the label, repeat this step and set the Use Data Field # to **4**. You may need to reposition the text or barcode on the label.
8. To print the patron barcode labels, choose File | Print, or choose the Print icon from the toolbar. From the Print dialog, select the Input Data File check box. Set the Identical Copies of Label to **1**, and then click Print. After printing, save your changes to the file.

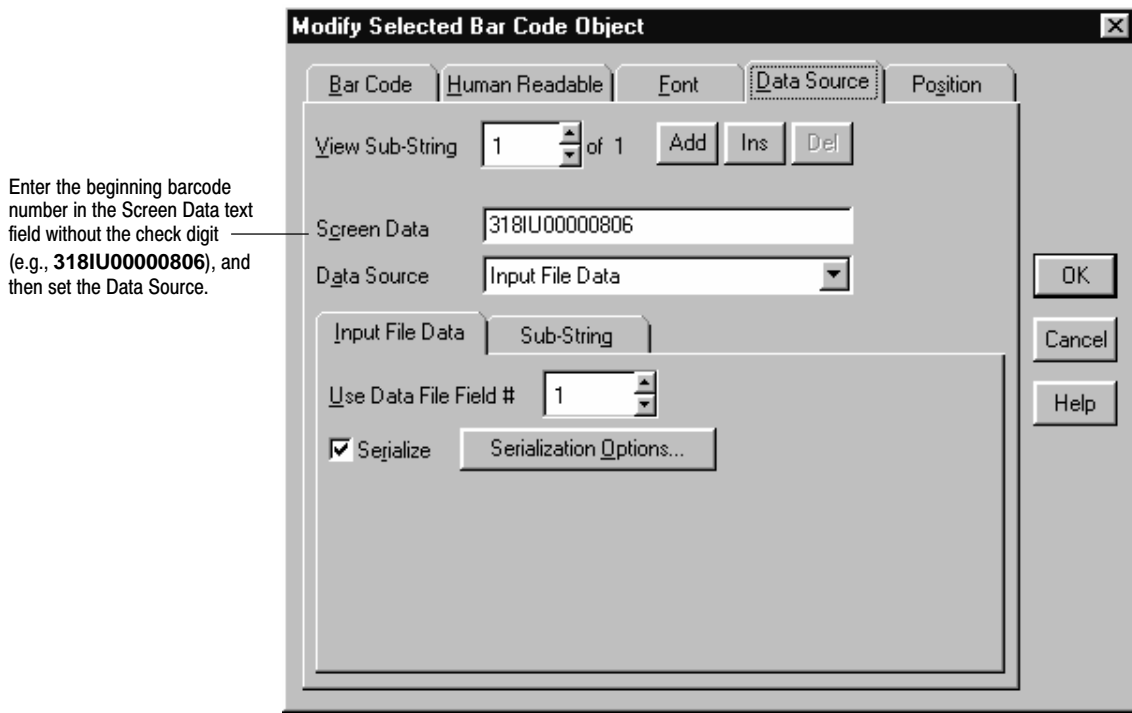
Barcodes in The Bar Tender

The Bar Tender for Windows reference manual (provided with the full program when purchased) describes in detail how to modify barcodes. If you are using any of the following symbologies with a check digit (checksum) and are planning to create barcodes in The Bar Tender, do not type the last digit of any 8- through 14-character barcode:

- Codabar Mod 10
- Code 39 Mod 10
- Code 39 Mod 11
- Code 39 Mod 43

Entering a check digit character in The Bar Tender will result in invalid barcodes.

Example: To define the barcode specifications for a Code 39 Mod 10 barcode with a check digit, after selecting the symbology and check digit type, select the Data Source tab:



The following is an example of a Code 39 Mod 43 barcode created by The Bar Tender:



The Bar Tender automatically calculates the check digit.

(Not shown actual size.)

Notes

Appendix H Configuring scanners

This appendix contains the following: information on using the ISBN barcode scanning feature; information on determining which scanners can be used to scan the ISBN barcodes; and the programming barcodes you'll need to configure these scanners.

Uses

Most items in your collection have ISBN barcodes imprinted on them by their publisher or producer. To make use of these barcodes in the library, you can configure your scanner to read them. If you have the item in hand, you can scan the ISBN barcode during several procedures:

- Searching for items in Cataloging. Scan the ISBN on the back cover of the book, and press the ISBN search button (not the Barcode button) on the toolbar to find its MARC record.
- Entering the ISBN when cataloging items. Put the cursor in the 020 tag in the MARC Editor, or in the ISBN text box in the Easy Editor, and scan the ISBN. Using this method allows error-free data entry in a critical tag.
- Building an LCCN-ISBN-ISSN list when exporting MARC records, or generating a Bibliography Report or Title List. In the LCCN-ISBN-ISSN List dialog, select the ISBN radio button, and scan in the ISBNs to build the list. You do not even have to press the Add button between scans.
- Entering the ISBN when creating a record "on the fly" at the Circulation Desk. When the Checkout procedure encounters an unidentified copy barcode, you may choose to create a permanent record. In the Add Title dialog, put the cursor in the ISBN text box, and just scan the ISBN to enter it.

Selecting a scanner

Of the scanners supported by Follett Software Company, the following scanners can be used to scan ISBNs in version 4.x or higher of the Follett applications:

- ScanTeam 3400 CCD scanner. (See instructions starting in next section.)
- ScanTeam 5400 Laser scanner. (See instructions starting on page 701.)
- ImageTeam 3800 Image Reader. Reads ISBN by default. (No programming is necessary.)

The following scanners will *not* support the scanning of ISBNs in Circulation Plus or Catalog Plus, version 4.x or higher:

- The ScanTeam 3210 CCD scanner and the PSC Quick Laser+ scanner. If you want to utilize the scanning feature, you will need to upgrade to a different scanner.
- PSC Quick Scan Laser+ scanner. If you want to utilize the scanning feature, you will need to upgrade to a different scanner.

ScanTeam 3400 CCD

Note: The programming sheet included in this section can only be used with the ScanTeam 3400 CCD scanner (DOS/WIN/MAC) with certain software revisions.

Getting ready

Before you start programming the ScanTeam 3400 CCD, you'll need to verify that you have the correct scanner by doing the following:

1. Determine which scanner you have by viewing the label underneath the scanner. Item numbers 522022, 522021, 722151, and 722150 are all item numbers associated with a ScanTeam 3400 CCD Scanner.
2. Determine which software revision is installed in your scanner by viewing the label underneath the scanner. If you have any of the following revisions, then you may proceed with the programming of the Scan Team 3400 CCD scanner. Version: 1.0, 1.1, 3.0, 4.0.4, 4.0.5, 4.0.6, or 4.0.7.

Note: If you have software revision 4.0.6.2 (DOS/WIN) or 4.0.7.2 (MAC) or greater, then you will not need to perform this programming. ISBN scanning is already enabled in scanner(s) with this software revision.

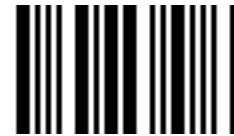
Programming codes for ScanTeam 3400 CCD scanner

To program the ScanTeam 3400 CCD for ISBN scanning, scan the following seven programming codes. Scan the barcodes in order from 1) through 7). Scan each barcode only *once*. After scanning each barcode, you will hear 1 or 2 beeps, indicating that the scan was successful.

1) 2 beeps



5) 1 beep



2) 1 beep



6) 1 beep



3) 1 beep



7) 2 beeps



4) 1 beep



ScanTeam 5400 Laser

Note: The programming sheet included in this section can only be used with the ScanTeam 5400 Laser scanner (DOS/WIN/MAC) with certain software revisions.

Getting ready

Before you start programming the ScanTeam 5400 Laser, you'll need to verify that you have the correct scanner by doing the following:

1. Determine which scanner you have by viewing the label underneath the scanner. Item numbers 722246 and 722245 are all item numbers associated with a ScanTeam 5400 Laser Scanner.
2. Determine which software revision is installed in your scanner by viewing the label underneath the scanner. If you have any of the following revisions,

then you may proceed with the programming of the Scan Team 5400 Laser scanner. Version: 2.0.4 or 2.0.5.

Note: If you have software revision 2.0.5.2 (DOS/WIN) or 2.0.4.2 (MAC) or greater, then you will not need to perform this programming. ISBN scanning is already enabled in scanner(s) with this software revision.

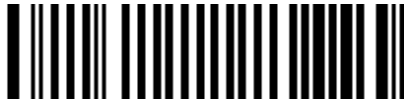
Programming codes for ScanTeam 5400 Laser scanner

To program the ScanTeam 5400 Laser for ISBN scanning, scan the following two programming codes. Scan the barcodes in order, starting with number 1). Scan each barcode *once* only. After scanning each barcode, you will hear 2 beeps, indicating that the scan was successful.

1) 2 beeps



2) 2 beeps



Index

Symbols

- ?. *See* wildcards
- *. *See* wildcards
- *NC circulation type, 46

Numbers

- 006 tags, 271
- 007 tags, 272
 - templates, 645
- 008 tags
 - authority, 281
 - bibliographic, 272–273
 - templates, 645
- 490 tags, indexing, 56
- 521 tags
 - cataloging instructions, 634–635
 - displaying in OPAC, 412
- 526 tags
 - cataloging instructions, 635–636
 - deleting globally, 334–335
- 6xx tags, deleting globally, 332
- 852 tags
 - subfield table, 289–307
 - in Winnebago, compared, 299
- 856 tags
 - in authority records, 358
 - cataloging tips, 355–357
 - deleting globally, 334–335
 - displaying in OPAC, 406–408, 415
 - as hyperlinks, 466
 - showing authority tags in OPAC, 57
 - WebPath Express and data exchange (DX), 92

A

- a. *See* nonfiling characters
- Accelerated Reader
 - See also* 526 tags; searching
 - cataloging instructions, 635–636
 - searching in Cataloging, 242
 - searching in OPAC, 461
- accent symbols. *See* diacritics
- access rights. *See* *Installation Guide*
- Acquisitions
 - adding vendors, 61
 - bill-to/ship-to information, 66
 - billing and shipping address, 373
 - calculating amounts, 373
 - changing address information, 378
 - Defaults tab, 66
 - editing funding sources, 64
 - filling out an order, 372
 - finding an order, 375
 - funding sources, 64
 - line items, 374
 - order life-cycle, 371
 - order status, 371
 - orders notes, 373
 - printing an order, 379
 - purchase information, 63
 - receiving line items, 376
 - vendor contact information, 63
 - vendor information, 61
 - vendor notes, 63
- addresses
 - editing patron, 188
 - formatting site, 36–37
 - setting up library mailing address, 35–36
 - viewing patron info in Circulation Desk, 130–133
- advanced utilities. *See* utilities
- Alliance Plus (module)
 - See also* autorecon; Process Misses
 - autorecon, 385, 390

password, 41
 selecting a data source, 382
 starting, 381–382

Alliance Plus CDs
 for autorecons, 382
 changing in Cataloging, 245–247
 copying records from, 251
 searching in Cataloging, 245–247

Alliance Plus Online
 for autorecons, 382
 copying records from, 251
 proxy configuration, 58
 searching in Cataloging, 245–247

an. *See* nonfiling characters

analyzing your collection, 323–324

and. *See* Boolean operators

annual calendars, 85–87

annual statistics. *See* statistics

application rights. *See* *Installation Guide*

articles. *See* nonfiling characters

asterisks. *See* wildcards

attendance list. *See* patron name list

audiovisual equipment, cataloging tips, 353

authority records
 cataloging electronic resources, 358
 changing views in Cataloging, 249
 creating, 252, 279–280
 creating cross-references, 278–284
 deleting, 252–253
 duplicating, 251, 252
 exporting, 318
 format guides for, 234
 Headings without Authorities Report, 517
 importing, 307–308
 in the MARC Editor, 278–284
 required information, 282–283
 searching for, 240–245
 selecting a template, 279
 subfield 'w', 283–284
 tags corresponding to bibliographic tags, 280
 templates, 643–646

automatically resetting search stations. *See* inactivity timeouts

autorecon
See also Alliance Plus
 in Book Cart, 347–352
 copy requirement for, 385, 390

description of, 385, 386, 390
 interrupting, 390
 keyword replacement, 389
 preparing for, 387, 391
 restarting, 388
 running, 387–390, 391–394
 standard numbers and, 387
 updating bibliographic records, 386–387

B

backup
See also restoring from backup
 Backup and Restore vs. third-party software, 605
 media rotation, 606
 requirements for third-party software, 610
 running Backup Prep, 611–612
 suggestions, 606

Backup and Restore
 backup file name, 609
 and exclusive mode, 607
 media rotation, 606
 media types, 605, 608
 password, 41, 607
 restoring in, 609–610
 restricted use of the database, 607
 using, 607
 vs. third-party software, 605

The Bar Tender, 693–698
 barcode check digits, 696–698
 editing barcode labels, 693–695
 label stock, 693
 printing patron barcode labels, 695–696
 printing sequential barcode labels, 695
 setting up, 693–695

Barcode Wizard, for Winnebago records, 301–303

barcodes
See also The Bar Tender
 Assign Barcode button, 652
 assigning to copies in Cataloging, 286
 assigning to copies on import, 292–294
 Circulation Desk command sheet, 118
 components of, 647
 converting Winnebago, 301–303
 Follett Classic, 38, 648
 handling unrecognized, in Circulation Desk, 123
 limiting reports by, 492
 PHD requirements, 38
 printing for copies, 514

- printing on patron cards, 572
 - printing on patron lists, 570
 - printing patron labels, 567
 - recognized by Follett applications, 649
 - scanning in Circulation Desk, 123
 - scanning with a PHD Dolphin+, 676–677
 - sounds while scanning, 127
 - supported by the PHD Dolphin+, 673
 - supported by the Telxon PHDs, 654
 - symbolologies, 647–652
 - defining symbolologies, 39–40
 - mixing symbolologies, 38
 - selecting symbolologies, 38, 649
 - setting up symbolologies, 37–40
 - testing symbolologies, 40, 650–652
 - terminology, 648
 - test print for patron labels, 569
 - torn or missing labels at checkin, 151
 - type indentifiers in, 38
 - typing into PHD Dolphin+s, 672
 - typing into Telxon PHDs, 659
 - Used/Unused Copy Barcodes Report, 535–536
 - Used/Unused Patron Barcodes Report, 579–580
 - Winnebago, examining, 297
 - Winnebago, on import, 301–303
- batch processing. *See* global processing
- batteries
- PHD Dolphin+, 671
 - Telxon PHDs, 668
- bibliographic records
- See also* tags
- adding temporary, in Circulation Desk, 139–141
 - adding to Book Cart, 346–347
 - adding with the Easy Editor, 255–262
 - adding with the MARC Editor, 264
 - enhancing with Book Cart, 346–352
 - brief record tags, default, 54–55
 - CEMARC records, 266
 - changing the material type icon, 268–281
 - changing views in Cataloging, 249
 - creating, 252
 - creating during checkout, 139–141
 - creating reports with extracted data, 585–586
 - database utilities, 591–604
 - deleting, 252–253
 - deleting 526 tags globally, 334–335
 - deleting 6xx tags globally, 332
 - deleting 856 tags globally, 334–335
 - deleting 9xx tags globally, 334–335
 - deleting after export, 316
 - deleting headings globally, 332
 - deleting titles without copies automatically, 57
 - deleting titles without copies globally, 335
 - duplicating, 251, 252
 - enhancing with an autorecon, 385–387, 390–391
 - exporting, 312–317
 - format guides for, 234
 - importing, 289–307
 - Leader, default, 645
 - main entry tags, 266, 280
 - matching rules in an autorecon, 385, 390
 - material types information, 268
 - merging copies onto, in Book Cart, 351
 - recommended content, 265–267
 - replacing in an autorecon, 386
 - replacing in Process Misses, 398–399
 - replicating, 263
 - searching for in Cataloging, 240–245
 - searching for in Circulation Desk, 123–125
 - size limits, 266
 - splitting a collection, 318–320
 - tags recognized by Cataloging, 627–632
 - templates, 643–646
 - temporary records, 139–141
 - and union data exchange, 95
 - updating headings globally, 324–326
 - updating reading/interest levels, 386–387
 - updating review sources, 386–387
 - updating with Alliance Plus, 386–387
 - updating with an autorecon, 385, 390
 - using the Easy Editor, 255–262
 - using the MARC Editor, 263–266
 - variable-length tags, 273
 - viewing circulation statistics, 135
 - viewing in Book Cart, 351
- bibliography
- creating in Book Cart, 349–352
 - creating in Reports, 502–503
 - creating in text OPAC, 475
 - creating in Visual OPAC, 484
 - creating in WebCollection Plus, 439
- Bibliography Report, 502–503
- bills, customizing, 82–84
- bindery. *See* copy status
- block conditions
- on checkout, 138
 - handling, 127–129
 - overriding, 129
 - password, 41
- Book Cart, 346–352
- adding records on import, 291

- adding records to, 346–347
 - autorecon in, 347–348
 - enhancing records in, 346
 - using MARC Magician with, 348–349
 - merging copies in, 351
 - printing the contents, 349–350
 - viewing records in, 351
 - Bookbag
 - setting up for Visual OPAC, 416
 - setting up in OPAC, 406–408
 - using in text OPAC, 475
 - using in Visual OPAC, 484
 - WebCollection Plus, 439
 - books. *See* copies
 - BookWhere. *See* Z39.50 Server Guide
 - Boolean operators, 460–463
 - borrowing. *See* circulation
 - borrowing limits. *See* loan policy setup
 - brief MARC records
 - See also* bibliographic records; Easy Editor and autorecon, 385, 390
 - defining, 54–55
 - discussed, 265–267
 - fields in, 266
 - report, 503
 - Brief Records Report, 503–504
 - browse searching, WebCollection Plus search setup, 444
 - browser settings, for WebCollection Plus, 433
 - but not. *See* Boolean operators
 - buttons
 - Cataloging toolbar, 236
 - OPAC toolbar, 411
 - Visual OPAC, 418–428
 - WebCollection Plus toolbar, 438
- C**
- calendars, setting up, 85–87
 - call number prefixes
 - creating, 50
 - defined, 48–51
 - editing, 50
 - printing a list of, 504
 - sorting order, 51
 - updating copies globally, 326
 - call numbers
 - adding to copies in Cataloging, 286
 - default tag location, 47–48
 - printing a list of copies with different call numbers, 511
 - printing a list of copies with other call numbers, 512
 - printing a list of copies without call numbers, 513
 - sorting order, 51
 - card printing, patron, 572–575
 - cataloging
 - See also* authority records; bibliographic records; copies
 - using Alliance Plus databases, 245–247
 - audiovisual equipment, 353
 - computer files, 367–370
 - copy information, 285
 - with the Easy Editor, 255–262
 - eBooks, 360–366
 - electronic resources, 355–370
 - local electronic resources, 357–358
 - with the MARC Editor, 263
 - vertical file materials, 353–354
 - videorecordings, 354–355
 - websites, 366–367
 - Cataloging (module)
 - description of, 233
 - limiting access to, 238–240
 - menu bar, 235
 - password, 41, 235
 - printing in, 253
 - restoring access to, 238
 - security settings, 238–240
 - setting up, 45–60
 - starting the application, 235–240
 - toolbar options, 236–240
 - categories
 - <added by import>, 52
 - adding to copies in Cataloging, 286
 - adding to copies on import, 292–294
 - assigning with a PHD, 338–340
 - creating, 53
 - creating reports with extracted data, 585–586
 - deleting, 54
 - discussed, 52–54
 - editing, 53
 - extracting transaction data, 585–586
 - maximum number, 53, 106
 - printing a list of, 504
 - printing title lists by category, 530–531
 - removing from copies with a PHD, 340–341

- removing from copies with a PHD Dolphin+, 689
 - removing globally, 54
 - renaming, 53
 - setting up, 52–54
 - sorting order, 57
 - splitting a collection using, 318
 - updating copies individually, 330
- Category Statistics Report, 539–540
- ceiling dates
- checking out and, 138
 - setting up, 77
- CEMARC records, fields in, 266
- Check Database Integrity utility, 594
- checking in
- See also* circulation; fines; holds; remote circulation; reserves
 - alert sounds, 152
 - assessing fines when, 158–159
 - barcode labels damaged or missing, 151
 - copies with holds or reserves, 152
 - error messages, 152–154
 - lost or missing copies, 152–154
 - overdue copies, 151
 - reshelving items, 152
 - troubleshooting, 152–154
- checking out
- See also* circulation; remote circulation
 - ceiling date and, 138
 - creating patron records when, 139
 - error messages, 144–146
 - handling block conditions when, 138
 - loan period setup, 76–78
 - netLibrary eBooks, 467
 - non-circulating copies, 141–142
 - non-standard circulation types, 127
 - procedure, 138–142
 - renewing copies, 147–148
 - special due dates, 143–144
 - temporary records, 139–141
 - troubleshooting, 144–146
- checkouts, viewing in Circulation Desk, 135
- Checkouts/Fines Transactions Report, 540–542
- circulation
- See also* remote circulation
 - basic transactions, 122–129
 - bibliographic record searches, 123–125
 - block conditions in, 138
 - block messages, table of, 127–129
 - checking in, 151–154
 - checking out, 137–146
 - command sheet, 118
 - Date Window in, 142–143
 - during inventory, 210–212
 - fines, 155–157
 - holds, 165–174
 - loan period setup, 76–78
 - messages for patrons, 126
 - patron record searches, 123–125
 - printing fine receipts, 156
 - printing refund receipts, 161
 - receipt printer, 120–121
 - remote with a PHD Dolphin+, 691
 - renewals, 147–150
 - reserves, 165
 - scanning barcodes, 123
 - searching for bibliographic records, 123
 - searching for patron records, 123
 - setting a special due date, 143–144
 - Transaction Tracker, 120–121
 - troubleshooting, 136
 - viewing copy status, 134–135
 - viewing due date list, 142
 - viewing patron pictures, 122
 - viewing patron records, 130–133
- Circulation Desk. *See* circulation
- Circulation Desk (module)
- clearing patron information for privacy, 118
 - daily holds processing, 115–118
 - daily holds processing exception report, 171–173
 - daily startup, 115–118
 - entering barcodes, 123
 - handling unrecognized barcodes, 123
 - limiting access to, 118–120
 - passwords, 41
 - restoring access to, 118
 - scanning barcodes, 123
 - security, 118–120
 - setting up sounds, 88
 - sounds, 126–127
- Circulation Statistics Report, 542–545
- circulation types
- adding to copies in Cataloging, 286
 - adding to copies on import, 292–294
 - assigning with a PHD, 338–340
 - creating, 47
 - default for new copies, 46
 - default types, 46
 - discussed, 45–47
 - editing, 47
 - non-standard, 127
 - printing a list of, 504

- printing a list of copies with certain, 516
 - setting maximum checkouts for, 78
 - standard, 88
 - updating copies globally, 326
 - updating copies individually, 330
- classroom transactions. *See* remote circulation
- clearing the Circulation Desk window, 118
- clock setup, 88
- closed days
 - in fine calculations, 82
 - setting up, 85–87
- Code Table List, 504–505
- Collection Age by Call Number Report, 545–546
- Collection Age by Subject Report, 547
- collection reports
 - analyzing your collection with, 323–324
 - Bibliography, 502–503
 - Collection Age by Call Number, 545–546
 - Collection Age by Subject, 547
 - Collection Statistics, 548–549
 - Collection Value, 550–551
 - Titles by Category, 530–531
- Collection Statistics Report, 548–549
- Collection Value Report, 550–551
- computer files, cataloging tips, 367–370
- converting databases. *See* *Conversion Guide*
- cookie files, and WebCollection Plus, 433
- copies
 - See also* barcodes; call numbers; categories; circulation types; copy status; description/enumerations; funding sources; sub locations; vendors
 - added, report, 506
 - adding, 285–288
 - assessing fines for lost, 163–164
 - assigning categories, 286
 - checking availability in WebCollection Plus, 445
 - checking in, 151–154
 - checking out, 138–142
 - creating eBook, 365
 - creating reports with extracted data, 585–586
 - deleting, 288
 - deleting lost, globally, 330
 - deleting missing, globally, 330
 - deleting with a PHD, 342–346
 - deleting with a PHD Dolphin+, 690
 - deleting with a scanner, 337
 - duplicating, 285
 - editing, 285–288
 - entering into inventory, 218–230
 - extracting transaction data, 585–586
 - global updates, 326–329
 - individually updating categories, 330
 - individually updating circulation types, 330
 - individually updating copy statuses, 330
 - linking to funding source tables, 327–329
 - linking to vendor tables, 327–329
 - marked, defined, 211
 - marking as lost, 161–163
 - marking as missing, 232
 - maximum per title, 266
 - merging in Book Cart, 351
 - missing, defined, 211
 - non-circulating, 141–142
 - printing barcodes for, 514
 - renewing checkouts on, 149
 - required information, 286
 - resetting missing to unmarked, 231
 - scanning barcodes with a PHD Dolphin+, 677–678
 - scanning barcodes with a Telxon PHD, 663
 - subfields for imported records, 289–291
 - unmarked, defined, 211
 - updating globally, 326–329
 - updating with a PHD, 338–343
 - viewing checkouts in Circulation Desk, 135
 - viewing circulation statistics, 135
 - viewing status in Circulation Desk, 134–135
 - from Winnebago, compared, 299
- Copies Added Report, 506
- Copies by Funding Source/Vendor Report, 507
- Copies with Different Call Numbers Report, 511
- Copies with Other Call Numbers Report, 512
- Copies without Call Numbers Report, 513
- Copy Barcode Labels, printing, 514
- Copy List by Circulation Type Report, 516
- Copy List by Status, 551–552
- copy status
 - adding to copies in Cataloging, 286
 - assigning with a PHD, 338–340
 - at the bindery, 135
 - changing Missing to Available, 210
 - checking in WebCollection Plus for Unions, 445
 - interlibrary loan, 135
 - and inventory, 211
 - lost, 161–163
 - on loan, 135

updating copies individually, 330
 viewing during circulation, 134–135

counters, about resetting, 37

cross-references
See also authority records
 creating as authority records saved, 56
 rebuilding in Cataloging, 346

customer number, setting up, 35

customizing. *See* setting up

D

daily Circulation Desk startup, 115–118
 error messages, 136

daily holds processing, 116

daily library hours, setting up, 85

daily statistics. *See* collection statistics report;
 statistics; system circulation statistics report

damaged copies, fines on, 158–159

Data Exchange. *See* Follett Data Exchange Guide

data source setup
 in Alliance Plus, 382–383
 in Cataloging, 245–247
 union catalog, 247

database servers
See also Installation Guide
 backing up, 605–612
 maintenance, 605–612

databases
See also utilities
 diagnosing library database problems, 594
 rebuilding, 599–600
 reindexing keywords, 595
 reindexing MARC databases, 596–597

date setup, 88

Date Slips, 552

DCOMM.INI, for PHD Dolphin+, 681

debts. *See* fines

description/enumerations
 adding to copies in Cataloging, 286
 displaying in OPAC, 412
 updating copies globally, 326

diacritics, using in the MARC Editor, 276

diagnosing library database problems, 594

directory rights. *See* Installation Guide

due dates
 non-circulating, 141–142
 setting up, 76–78
 special, 143–144
 viewing in Circulation Desk, 142–143

DX. *See* Follett Data Exchange Guide

E

Easy Editor
 Added Description tab, 257
 Added Entries tab, 260
 adding records, 255
 adding, editing, or duplicating records,
 255–262
 automatic punctuation in, 257
 Brief Record tab, 256–257
 editing records in, 256
 electronic resources tag, 257
 fields on added description tab, 258
 fields on added entries tab, 260
 fields on brief record tab, 257
 fields on subjects tab, 259
 and Find Headings, 261
 interest levels, 257–258
 recommended uses, 255
 required information, 256–257
 saving records, 262
 selecting the default editor, 57
 Subjects tab, 259
 tags supported in, 632–633

eBooks
See also electronic resources
 adding copies, 365
 cataloging, 360–366
 in OPAC, 468

eBooks, Follett, in WebCollection Plus, 449

electronic resources
 and Titles Without Copies Report, 533
 cataloging computer files, 367
 cataloging tips, 355–370
 cataloging websites, 366
 deleting tags globally, 334–335
 enabling, 57, 415
 enabling in OPAC, 406–408
 setting up in Visual OPAC, 415
 tag in Easy Editor, 257–258
 viewing Follett eBooks in WebCollection Plus,
 449
 viewing in OPAC, 466–470

Empty Database utility, 602

enhancement request form, 727

ephemeral materials. *See* temporary records

error messages. *See* troubleshooting

events

- and daily Circulation Desk startup, 116–118
- entering, 43–44
- notes, 44
- setting up, 43–44
- viewing in OPAC, 476
- viewing in WebCollection Plus, 450

exception reports

- daily holds processing, 171–173
- exporting MARC records, 321–322
- importing MARC records, 308–310
- importing patron pictures, 206
- importing patron records, 203–204
- remote circulation, 179–182
- remote inventory, 228–230
- updating patrons with a PHD, 198
- utility, 603
- Weeding log, 344

exporting

- authority records, 318
- bibliographic records, 312–317
- copy information, 315
- deleting bibliographic records after, 316
- exception reports from, 321–322
- patron records, 207–208
- via PHD, 315
- by ranges, 313
- by standard number, 313
- in Union Catalog Plus, 317–322
- from Winnebago, 298

Extract Data, 585–590

- creating reports, 586
- extract patron data check box, 88
- fields available in, 589
- selecting the fields, 589
- setting up, 88

extracting data

- about, 585
- information you can retrieve, 585
- patron history, 585

F

FairCom Server. *See* database servers; *Installation Guide*

file formats. *See* import file formats

File Reload utility. *See* Reload File utility

filtering rules (DX)

- changing, 112
- description of, 94–95
- impact on reports, 110
- setting up, 94

finalizing an inventory, 230–231

Find by, orders in Acquisitions, 375

Find Headings

- choosing the default list, 57
- in the Easy Editor, 261
- in the MARC Editor, 276

Find Patron dialog, in Circulation Desk, 124–125

Find Title dialog

- in Circulation Desk, 125
- error messages, 136

Find-It-All Collection

- in Cataloging, 245
- in OPAC, 463
- toolbar button, 237

finding a book order, 375

Fine Notices, 561–565

fine notices, customizing, 82

finest

- alert sounds at checkin, 155
- checking in overdue copies, 151–152
- Checkouts/Fines Transactions Report, 540–542
- for closed days, 82
- on damaged copies, 158–159
- editing, 160
- error messages, 164
- and fine limits, 163
- grace periods for, 82
- on lost copies, 163
- on overdue copies, 158–159
- paying individual fines, 158
- paying the fine balance, 157
- printing overdue notices, 561–565
- printing receipts, 156
- refunds for, 161
- replacement-cost limits for, 82
- setting limits for patron types, 77

- setting up automatic option, 81–82
 - setting up maximum allowed, 76–78
 - setting up refund generation, 81–82
 - setting up threshold, 77
 - setting up user-defined, 158
 - tracking payments, 156
 - troubleshooting, 164
 - types of, 155–157
 - updating, 160
 - user-defined, 158
 - viewing patron information, 130–133
 - waiving, 160
- fixed due dates, setting up, 77
- Follett Classic barcode symbologies, 648
- Follett customer number, setting up, 35
- Follett Data Exchange Server
 - See also* members; union catalogs
 - while building a union, 602
- Follett eBooks
 - in OPAC, 468
 - in WebCollection Plus, 449
- Follett Services Setup. *See Follett Data Exchange Guide*
- Follett Software Company, contacting, 29
- foreign characters. *See* diacritics
- formats for MARC records. *See* authority records; bibliographic records
- formats, file. *See* import file formats
- full MARC records
 - See also* bibliographic records
 - discussed, 265–267
 - fields in, 266
- funding sources
 - adding in Acquisitions, 64
 - adding to copies in Cataloging, 286
 - adding to copies on import, 292
 - amounts in Acquisitions, 65
 - linking to copies, 327–329
 - report of, 507
 - updating copies globally, 326–329

G

- global processing
 - deleting lost copies, 330
 - deleting missing copies, 330
 - deleting patron records, 195–196

- deleting subject headings, 332
 - deleting tags, 334–335
 - deleting titles without copies, 335
 - linking copies to funding sources, 327–329
 - linking copies to vendors, 327–329
 - updating bibliographic headings, 324–326
 - updating bibliographic records, 324–326
 - updating call number prefixes, 326
 - updating circulation types, 326
 - updating enumeration descriptions, 326
 - updating funding sources on copies, 326–329
 - updating patron records, 191–192
 - updating sub locations, 326
 - updating vendors on copies, 326–329
 - using a PHID, 338
- grace periods, and fine calculations, 82
- groups, setting up, 101
- guest rights. *See Installation Guide*
- guests. *See* patron records

H

- hardware requirements. *See Installation Guide*
- headings
 - deleting subject, globally, 332
 - Headings without Authorities Report, 517
- headings list. *See* Find Headings
- Headings without Authorities, 517
- help. *See* online help; troubleshooting
- hold notices
 - customizing, 82–84
 - printing, 553
- Hold Statistics Report, 556
- Hold Transactions Report, 557–558
- holdings. *See* copies
- holds
 - alert sounds, 165
 - changing the priority, 170–174
 - checking in copies with, 152
 - daily Circulation Desk startup, 115–118
 - daily processing report, 171–173
 - deleting, 168
 - discussed, 165–166
 - during remote circulation, 179–182
 - editing, 169–170
 - expired, 169
 - extending expiration dates, 169–171

- managing, 169
 - placing in Circulation Desk, 168–169
 - placing in OPAC, 473–474
 - placing in WebCollection Plus, 445
 - printing notices, 553–555
 - queue, 170–174
 - reviving, 169–170
 - setting up patron limits, 76–78
 - setting up requests in WebCollection Plus, 440–442
 - setting up time limits, 78–80
 - statistics report, 556
 - system statistics reports, 582
 - transactions report, 557–558
 - troubleshooting, 174
 - viewing patron information, 130–133
- hours setup, 85
- hyperlinks
See also electronic resources
 in OPAC display, 250
- I**
- import file formats
 copy records, 289
 patron pictures, 204
 patron records, 199–202
- import options, in Cataloging, 292–294
- important messages
 adding to patron records, 189
 viewing in Circulation Desk, 126
- importing
 and adding to Book Cart, 291
 authority records, 307–308
 by barcode, 295
 bibliographic records, 289–307
 by control number, 296–297
 copies, 289–307
 enhanced records, 295–296
 exception reports from, 308–310
 Import Options in Cataloging, 292–294
 patron pictures, 204–206
 patron records, 202–204
 previewing an import, 294
 reimporting your records, 296–297
 straight import, 291
 unknown categories, 52
 updated records, 295–296
 vendor records, 291
 WebPath Express authority records, 307–308
 WebPath Express bibliographic records, 291
 Winnebago records, 297–310
- inactivity timeouts
 for Follett eBooks, 449, 468
 in Circulation Desk, 88
 setting up in OPAC, 406
 in WebCollection Plus, 446
- indexes, rebuilding keyword, 595
- indicators
 editing tag, 274
 editing the default, 645–646
- Information page, in WebCollection Plus, 450
- installing FSC products. *See Follett Data Exchange Guide; Installation Guide; WebCollection Plus Guide; Z39.50 Server Guide*
- interest levels
See also 521 tags; Easy Editor; limiters
 cataloging, 634
 displaying in OPAC, 412
 displaying in WebCollection Plus, 449
 limiting searches by in Cataloging, 241–242
 limiting searches by in OPAC, 470–471
 updating with an autorecon, 386–387
- interlibrary loans
See also copy status; WebCollection Plus
 setting up requests in WebCollection Plus, 440–442
- inventory
See also remote inventory
 checklist, 213–214
 circulation during, 210
 copy status and, 211
 data files for Mac OS, 225
 deleting missing copies globally, 330
 entering copies one at a time, 219–220
 entering copies with a data file, 227
 entering copies with a PHD, 221
 exception reports for remote, 228
 exclusive use and Begin Inventory, 210
 finalizing, 230–231
 full vs. partial, 217
 Inventory List by Call Number, 558–559
 Inventory List by Title, 559–560
 messages, 219–221, 228–230
 overview, 209–212
 using a PHD Dolphin+, 676
 planning, 210
 using a portable computer, 223–227
 processing a data file, 227
 Remote Batch Disk utility, 224
 remote batch files, 223

- creating remote batch files for DOS, 226
- reopening last inventory, 231
- resetting missing copies, 231
- saving remote inventory data, 223
- shelf-checking option, 222
- starting an, 217
- statistics in main window, 230
- using a Telxon PHD, 663

Inventory (module)

- Begin Inventory process, 217–218
- password, 41
- statistics in main window, 218

Inventory List by Call Number, 558–559

Inventory List by Title, 559–560

ISBNs

- See also* MARC Editor Help
- configuring scanners for, 699–702
- scanning in Cataloging, 247

K

keypad instructions

- PHD Dolphin+, 672
- Telxon PHDs, 656

keywords

- creating as bibliographic records are saved, 56
- if not found in OPAC search, 464
- if not found in WebCollection Plus search, 452
- including in a backup, 608
- Power searching in OPAC, 459
- rebuilding, 595
- searching by, 459–460
- updating in Cataloging, 345
- WebCollection Plus search setup, 444

L

label stock

- copy barcodes, 515
- patron barcode labels, 569
- patron cards, 574
- spine/pocket, 522–525
- The Bar Tender, 693

Leader tags

- authority, 281
- bibliographic, 268
- templates, 645

leading articles

- See also* nonfiling characters
- editing indicators for, 274
- foreign language, 58
- ignoring in search terms, 58
- setup options, 58

levels of participation. *See* participation levels

Lexile measures

- See also* 521 tags; reports; searching
- searching in Cataloging, 243
- searching in OPAC, 461

Lexile Report, 520

library calendars, 85–87

library cards, printing, 572–575

library hours, setting up, 85

Library Information page, in WebCollection Plus, 450

library setup. *See* setting up

limiters

- See also* 521 tags
- setting up in OPAC, 412–414
- using in Cataloging, 241–242
- using in OPAC, 470–471

limiting access

- to Cataloging, 238–241
- to Circulation Desk, 118–120
- in OPAC, 406–408

limiting checkouts. *See* block conditions

links

- setting up in OPAC, 408–409
- setting up in Visual OPAC, 423
- setting up in WebCollection Plus, 448, 451
- using in OPAC, 474

lists. *See* reports

loan periods, discussed, 45–47

location fields in patron records, 72

logging in

- in OPAC, 472
- in WebCollection Plus, 445

login rights. *See* *Installation Guide*

lost copies, 161–163

- See also* missing copies
- checking in, 152–154
- deleting globally, 330
- replacement-cost limits on fines for, 82

M

main entries. *See* bibliographic records

maintenance

See also utilities

backing up your database, 605–612

Telxon PHDs, 668–670

maintenance utilities. *See* utilities

MARC 21 records. *See* authority records;
bibliographic records

MARC databases. *See* databases

MARC Editor

See also authority records; bibliographic
records; tags

adding bibliographic records, 264

and Alliance Plus autorecon, 265

authority fixed-length tags, 281–282

creating authority records, 279–280

customizing a template, 643

duplicating authority records, 278–284

duplicating bibliographic records, 263–266

editing authority records, 278–284

editing bibliographic records, 263–266

fixed-length tags, 268

overview, 265

printing proof sheets, 277

replicating bibliographic records, 263

saving authority records, 284

saving bibliographic records, 277

selecting a template, 264

selecting the default editor, 57

tags recognized by Cataloging, 627–632

MARC Magician

and the Book Cart, 348–349

launching from Cataloging, 237

toolbar button, 237

MARC Organization Code

in 852 tag, 289

and importing to union catalogs, 295–297

obtaining, 36

setting up, 35

MARC proof sheet display, 249

MARC records. *See* authority records;
bibliographic records

MARC tags. *See* tags

MARC utilities. *See* utilities

MARC View Window

in Cataloging, 249

printing in, 253

marked inventory status, 211

material type icons, changing, 268

material types

See also limiters

icons for eBooks, 467

limiting searches by in Cataloging, 241–242

limiting searches by in OPAC, 470–471

media center. *See* setting up

members

See also Follett Data Exchange Guide; union
catalogs; WebCollection Plus for Union

assigning copies to on import, 295–297

getting records from the union database, 247

limiting reports, 494

limiting searches, 242

limiting searches by, 412–414, 470–471

setting up site information, 35–36

members (union catalog)

adding records to the union, 112

adding, to the union, 101–112

deleting, 112

filtering rules, 94

participation levels, 93

reloading DX members, 112

updating DX connections, 112

memory capacity

PHD Dolphin+, 673

Telxon PHDs, 658

merging copies, 351

messages. *See* important messages;
troubleshooting

missing copies

checking in, 152–154

deleting globally, 330

marking as lost, 161–163

outside of inventory, 232

resetting to unmarked, 231

missing inventory status, 211

resetting copies to unmarked, 231

MOC. *See* MARC Organization Code

module rights. *See* Installation Guide

monthly statistics. *See* circulation statistics report;
collection statistics report; statistics; system
circulation statistics report

multiple locations. *See* OPAC

My Info

in OPAC, 473

in WebCollection Plus, 445
setting up, 74

N

name lists, patron, 575–577

navigation, in Visual OPAC, 479

netLibrary

accessing the website, 237
eBooks in Cataloging, 250
eBooks in OPAC, 467
setting up ID number, 35
toolbar button, 237

network rights. *See Installation Guide*

networks. *See Installation Guide*

NiCd rechargeable batteries, 668–670

non-circulating copies, 141–142

non-circulating eBook circulation type, 46

nonfiling characters

editing indicators for, 274
setup options, 58

not. *See Boolean operators*

notes

circulation, on copies, 286
copy, 286
event, 44
fine, 158
patron record, 189

notices

See also reports
customizing, 82–84
for overdue copies, 561–565
ready hold, 553–555
salutations for patron types, 71

Novell NetWare. *See Installation Guide*

Novell networks. *See Installation Guide*

O

ODBC Driver. *See Installation Guide; ODBC Driver Guide*

on-demand data sharing, in Cataloging, 247

Online Public Access Catalog. *See OPAC; WebCollection Plus*

OPAC

See also WebCollection Plus

Boolean operators, 460–463
copying setup to other search stations, 429
creating Visual OPAC button sets, 424
deleting Visual OPAC buttons, 427
description of text OPAC, 404
description of visual OPAC, 404
electronic resources in, 466–470
enabling hyperlinks, 406–408, 415
importing default Visual button sets, 416
importing Visual button sets into WebCollection Plus, 447
limiting access in, 406
linking to outside applications, 408–410
logging into, 472
naming Visual OPAC buttons, 420–421
netLibrary eBooks, 467
Patron Empowerment in, 472
Patron Empowerment setup, 74
printing in text OPAC, 470
printing in visual OPAC, 481, 483, 484
record view in text OPAC, 463–470
record view in visual OPAC, 482–483
repeating searches, 472
searching in text, 458
selecting an interface, 405
setting display options, 412–414
setting limiter options, 412–414
setting search options, 410–414
setting the Visual OPAC button action, 422–426
setting up General tab controls, 404–410
setting up links, 408
setting up multiple search stations, 429
setting up passwords, 409
setting up Text OPAC tab controls, 410–414
setting up Visual tab controls, 415–418
accessing Setup, 403
stop words, 459
TitlePeek in, 469
toolbar options, 411–414
using links, 474
viewing events, 476
Visual OPAC button image specifications, 421
Visual OPAC button images, 421–422
Visual OPAC button sets, default, 416–417
Visual OPAC buttons, adding, 418–428
Visual OPAC buttons, editing, 418–428
Visual OPAC navigation, 479
Visual OPAC toolbar, 477
Visual Type-in Search, 480
visual vs. text interface, 404
wildcards in searching, 459

OPAC display mode in Cataloging, 249

or. *See* Boolean operators

OTH call number prefix, 48

overdue copies

checking in, 151–152

fining on, 158–159

printing notices for, 561–565

Overdue List, 566

Overdue/Bill Notices, 561–565

customizing, 82–84

overriding block conditions, 129

P

partial inventory, 217

See also inventory

participation levels

changing, 112

setting up, 93

passwords

default, for modules, 41

Follett eBooks, 449

for OPAC, 409

for patron login, 74

setting up, 40–41

for WebCollection Plus setup, 432

Patron Barcode Labels, 567

test print, 569

Patron Barcode List, 570

Patron Cards, 572–575

Patron Conversion. *See* *Patron Conversion Utility Guide*

Patron Empowerment

setting up, 74

using in OPAC, 472–474

in WebCollection Plus, 439, 445

patron history

extracting data, 585

removing, 601

patron information

viewing in Circulation Desk, 130

viewing in OPAC, 473–474

viewing in WebCollection Plus, 445

Patron Maintenance, password, 41

Patron Name List, 575–577

patron pictures

See also patron records

adding, 189–190

import file formats for, 204–206

importing, 204–206

importing exception report, 206

importing from Herff Jones, 205

importing from Lifetouch, 205

picture folder for import, 204

supported formats, 190

viewing in Circulation Desk, 122

patron records

See also patron pictures

adding in Circulation Desk, 129

adding in Patron Maintenance, 187–190

addresses, 188

Circulation Desk view, 130–133

clearing a field in, 192

converting. *See* *Patron Conversion Utility Guide*

creating during checkout, 139

creating reports with extracted data, 585–586

deleting globally, 195–196

deleting individual, 190

deleting records by graduation year, 195–196

deleting with a PHD, 196–197

editing in Circulation Desk, 129

editing in Patron Maintenance, 187–190

exporting, 207–208

exporting to The Bar Tender, 207

fining, 155–157

global processing, 191–192

import error checking, 202

import file format for, 199–202

important messages in, 189

important messages in Circulation Desk, 126

importing, 202–204

importing errors, 203

as input data file for The Bar Tender, 207

location fields, 72

notes in, 189

Patron Empowerment setup, 74

patron pictures, 189–190

printing barcode labels, 567

printing information in Circulation Desk, 132

printing library cards, 572–575

printing statistics in Circulation Desk, 133

scanning barcodes with a Telxon PHD, 663

searching for, 184–186

searching for in Circulation Desk, 123–125

setting up required fields, 73

setting up user-defined field names, 72–74

updating individually, 192–193

updating with a PHD, 193–195

Used/Unused Patron Barcodes Report,

579–580

- user fields, 72
- viewing patron info in Circulation Desk, 130–133
- viewing statistics in Circulation Desk, 133
- patron searches
 - in Circulation Desk, 123–125
 - in Patron Maintenance, 184–186
- patron statistics, removing, 601
- Patron Statistics Report, 577–578
- patron types
 - defined, 69–71
 - setting up circulation policies, 76–78
 - setting up default, 72–74
 - statistics report, 577
- patrons. *See* patron records
- paying fines
 - See also* fines
 - fine balance, 157
 - individual fines, 158
 - printing receipts, 156
- penalties. *See* fines
- PHD
 - See also* PHD Dolphin+; remote circulation; Telxon PHDs
 - barcode requirements for, 38
 - changing port and speed, 43
 - deleting patron records with, 196–197
 - inventorying your collection, 221–223
 - loading the application, 42–43
 - remote circulation, 175–182
 - reports with, 496
 - splitting a collection with, 318–320
 - updating copies, 338–343
 - updating patron records, 193–195
- PHD Dolphin+, 671–692
 - See also* PHD; PHD messages
 - batteries, 671
 - charging, 671
 - checking your symbologies, 673
 - collecting remote circulations, 674
 - DCOMM.INI file, 681
 - deleting copies with, 690
 - display symbols, 672
 - editing copy records with, 688
 - editing patron records with, 686
 - entering scans into inventory, 684
 - erasing scans in, 679, 692
 - exporting MARC records with, 687
 - function keys, 672
 - HomeBase connection, 671
 - important keys, 682
 - loading the application, 683
 - loading the application the first time, 671
 - main menu, 683
 - memory capacity, 673
 - quick reference guide, 682–692
 - rebooting, 679
 - remote circulation with, 691
 - removing categories with, 689
 - creating reports with, 685
 - reviewing your scans, 678
 - scan counts in, 678, 692
 - scanning copy barcodes, 677–678
 - scanning in inventory, 676
 - scanning patron barcodes, 676–677
 - supported barcodes, 673
 - troubleshooting, 679
- PHD Laser+. *See* PHD; Telxon PHDs
- PHD messages
 - (black squares), 667
 - 56>, 57>, 62>, 65>, 66>, 68>, or 69>, 667
 - C:\>, 679
 - Cannot Connect, 666
 - Cannot Login, 666
 - DOS0011: Invalid Format, 680
 - Error Opening Xaction File, 666
 - Invalid Entry, 666
 - Lost DSR, 667
 - Low Battery, 667
 - Memory Full, 667
 - Processing Group III?, 666
 - Ready to Update?, 655
 - Select Printout Type Group I, 666
 - Setup Group IV, 666
 - Timeout, 679
 - What Sequence Group II, 666
- PHD+. *See* PHD; Telxon PHDs
- PHD+ II. *See* PHD; Telxon PHDs
- phone numbers
 - Follett Software Company, 29
 - Technical Support, 30
- phonetic symbols. *See* diacritics
- pictures. *See* OPAC, Visual OPAC button image; patron pictures
- pocket labels, 522–525
- port, changing for a PHD, 43
- Power searches. *See* keywords
- pre-reserve processing days, setting up, 79–80
- prefixes. *See* call numbers

printing
 barcode labels with The Bar Tender, 695
 copy barcodes, 514
 date slips, 552
 hold notices, 553–555
 overdue notices, 561–565
 patron barcodes, 567
 patron information in Circulation Desk, 132
 patron library cards, 572–575
 proof sheets, 277, 284
 with Receipt Printer in Circulation Desk, 120–121
 reports, 495–498
 setting up in OPAC, 406
 spine/pocket labels, 522–525
 system information, 582–584
 text OPAC options, 470
 with Transaction Tracker in Circulation Desk, 120–121
 Visual OPAC options, 481, 483, 484

privileges. *See* *Installation Guide*

problems. *See* troubleshooting

Process Misses
See also Alliance Plus (module); autorecon
 discussed, 395
 limitations, 395
 options for processing records, 395
 options for updating bibliographic records, 399–401
 restarting, 397
 running, 396–402
 searching Alliance Plus, 398–399
 starting, 396
 updating bibliographic records, 386

program items. *See* shortcuts

prohibiting circulation. *See* block conditions

pronunciation symbols. *See* diacritics

proof sheets, 277, 284

proxy configuration
 for Alliance Plus Online in Cataloging, 58
 for TitlePeek in Cataloging, 58
 for TitlePeek in OPAC, 405

PTC–600/PTC–620. *See* Telxon PHDs

publishing years. *See* limiters

Q

question marks. *See* wildcards

QuickLinks, in WebCollection Plus, 448

R

R circulation type, 46

reading barcodes. *See* scanning

Reading Counts!
See also 526 tags; searching
 cataloging instructions, 635
 searching in Cataloging, 244
 searching in OPAC, 462

reading level, displaying in WebCollection Plus, 449

reading levels
See also 521 tags; 526 tags; limiters
 cataloging, 634
 displaying in OPAC, 412
 limiting searches by in Cataloging, 241–242
 limiting searches by in OPAC, 470
 updating with an autorecon, 386–387

Reading Program Recon, 390

reading programs
See also 526 tags
 cataloging for, 635
 deleting tags globally, 334
 in the Easy Editor, 257–258
 enhancing library records with information, 390

Ready Hold Notices, 553–555

rebooting
 PHD Dolphin+, 679
 Telxon PHDs, 667

Rebuild Database utility, 599–600

Rebuild File Indexes utility, 597–598

Rebuild Keywords utility, 595

Rebuild MARC Headings utility, 596–597

Receipt Printer, setting up, 120

records. *See* authority records; bibliographic records; copies; patron records

refunds, 161
See also fines
 automatic refund generation option, 81–82
 printing receipts for, 161

registered products, viewing, 603

Reload File utility, 600–601

remote circulation, 175–182
See also PHD; PHD Dolphin+; Telxon PHDs

- before recording transactions, 176
 - checking in copies with holds, 179–182
 - exception report, 179–182
 - gathering data with a PHD Dolphin+, 674–675
 - gathering data with a Telxon PHD, 661–663
 - processing collected transactions, 176–182
 - reshelving non-checked out items, 177
 - troubleshooting, 182
 - using a PHD Dolphin+, 691
- remote inventory
- See also* inventory; PHD; PHD Dolphin+; Telxon PHDs
 - data files for Mac OS, 225
 - exception reports for remote, 228
 - using a portable computer, 223–227
 - processing a data file, 227
 - Remote Batch Disk utility, 224
 - remote batch files, 223
 - creating remote batch files for DOS, 226
 - saving remote inventory data, 223
 - using a PHD, 221–223
- renewals, 147–150
- error messages, 150
 - setting a special due date, 143–144
- replacement-cost limits, 82
- replacing bibliographic records, in Alliance Plus, 386
- reports
- See also* exception reports
 - analyzing your collection, 323–324
 - barcode list building, 492
 - Bibliography, 502–503
 - Brief Records, 503–504
 - Category Statistics, 539–540
 - Checkouts/Fines Transactions, 540–542
 - Circulation Statistics, 542–545
 - Code Table List, 504–505
 - Collection Age by Call Number, 545–546
 - Collection Age by Subject, 547
 - Collection Statistics, 548–549
 - Collection Value, 550–551
 - Copies Added, 506
 - Copies by Funding Source/Vendor, 507
 - Copies with Different Call Numbers, 511
 - Copies with Other Call Numbers, 512
 - Copies without Call Numbers, 513
 - Copy List by Circulation Type Report, 516
 - Copy List by Status, 551–552
 - customizing copy lists by call number, 51
 - Date Slips, 552
 - Extract Data, 585–590
 - generating, 489–498
 - Headings without Authorities, 517
 - Hold Statistics, 556
 - Hold Transactions Report, 557–558
 - Inventory List by Call Number, 558–559
 - Inventory List by Title, 559
 - Lexile, 520
 - Overdue List, 566
 - Overdue/Bill Notices, 561–565
 - Patron Barcode List, 570
 - Patron Cards, 572–575
 - Patron Name List, 575–577
 - Patron Statistics, 577–578
 - pick list for reserves, 557–558
 - printing, 495–498
 - Shelf List, 521
 - system, 581–584
 - System Circulation Statistics, 582
 - System Information, 582
 - Title List, 525–528
 - Titles Added/Updated, 529–530
 - Titles by Category, 530–531
 - Titles With Duplicate Standard Numbers, 531–532
 - Titles Without Copies, 533–534
 - Titles Without Standard Numbers, 534–535
 - Used/Unused Copy Barcodes, 535–536
 - Used/Unused Patron Barcodes Report, 579–580
 - Weeding log, 344
- Reports (module)
- cataloging reports, 499–536
 - circulation reports, 537–580
 - password, 41
 - selecting the report date, 494
 - setting up options, 489–494
 - starting the application, 487–488
- reserves
- See also* holds
 - checking in copies with, 152
 - circulating in the interim, 166
 - daily processing report, 171–173
 - deleting, 168–169
 - discussed, 166–167
 - effect on circulation, 166
 - making ready, 166
 - pick list, 557–558
 - placing in Circulation Desk, 168–169
 - placing in OPAC, 473–474
 - placing in WebCollection Plus, 445
 - setting up, 79–80
 - transactions report, 557–558
 - troubleshooting, 174

resetting, search stations. *See* inactivity timeouts

reshelving items, 152
 alert sounds, 152
 in remote circulation, 177

resource sharing. *See* exporting; importing

restarting
 autorecon, 388
 Process Misses, 397

restoring access
 to Cataloging, 238
 to Circulation Desk, 118–120

restoring from backup
See also backup
 requirements for third-party software, 612
 using Backup and Restore, 609–610

restrictions. *See* block conditions

review sources
 displaying in WebCollection Plus, 449
 updating with an autorecon, 386–387

rights. *See* *Installation Guide*

S

salutation for notices, 71

scanner, deleting copies with, 337

scanning ISBN barcodes, 699–702
 when searching, 247

search history
 text OPAC, 472
 Visual OPAC, 479

search limiters. *See* limiters

search results
 using, in Cataloging, 248
 using, in OPAC, 463–470
 using, in Visual OPAC, 481

search station setup. *See* *Installation Guide*

searching
See also OPAC
 and 490 tags, 56
 Accelerated Reader titles, 242, 461
 all database sources, 246
 Alliance Plus by standard number, 398
 Alliance Plus by title, 399
 Alliance Plus databases, 245–247
 for authority records, 240–245

for bibliographic records, 123–125, 240–245
 using Boolean operators, 460
 creating cross-references as authority records
 are saved, 56
 creating keywords as bibliographic records
 saved, 56
 customizing copy lists by call number, 51
 data source options in Cataloging, 245–247
 Find-It-All Collection in Cataloging, 245
 Find-It-All Collection in OPAC, 463
 Lexile measures, 243
 Lexile measures in OPAC, 461
 limiters in, 241–242
 OPAC options for, 410–414
 patron record search methods, 184–186
 for patron records, 123–125, 184–186
 Power, in OPAC, 459
 Reading Counts! titles, 244
 Reading Counts! titles in OPAC, 462
 repeating a search, 472
 resetting search stations, 476, 484
 by scanning ISBN, 241, 247
 Selected Database Sources, 245–247
 tags searched, table of, 637
 in text OPAC, 458–463
 in Visual OPAC, 477–484
 and wildcards, 459

security

See also passwords
 limiting access to Cataloging, 238–240
 limiting access to Circulation Desk, 118–120

Selected database sources, in Cataloging, 245–247

servers. *See* database servers; *Follett Data Exchange Guide*; *Installation Guide*

setting up

Acquisitions defaults, 66
 The Bar Tender, 693–695
 barcode symbologies, 37–40, 649
 borrowing limits, 76–78
 brief MARC record tag range, 54–55
 calendar, 85–87
 call number locations, 47–48
 call number prefixes, 48–51
 call number sort order, 51
 Cataloging toolbar, 236–240
 categories, 52–54
 ceiling dates, 77
 country, 36–37
 cross-reference generation, automatic, 56
 data exchange rules, 108
 database sources in Cataloging, 245
 date and time, 88

- default Cataloging editor, 57
- default patron type, 72–74
- due dates, 76
- events, 43–44
- Find Headings default list, 57
- fine limits for patron types, 77
- finer calculation option, 81–82
- fixed due dates, 77
- Follett customer number, 35–36
- General OPAC tab, 404
- groups, 101
- holds limits for patron types, 77
- holds time limits, 78–80
- inactivity timeouts for Circulation Desk, 88
- keyword generation, automatic, 56
- leading articles in search terms, 58
- library hours, 85
- library identification, 35–36
- library statistical year information, 36–37
- loan periods, 76–78
- location fields, 72
- MARC Organization Code, 35
- multiple search stations, 429
- netLibrary ID number, 35
- OPAC, 403–430
- passwords, 40–41
- Patron Empowerment, 74
- patron fields, required, 72
- patron passwords, 74
- patron record user-defined fields, 72–74
- patrons, 69–71
- PHD, 42
- pre-reserve processing days, 79–80
- printing in OPAC, 406–408
- report options, 489–494
- reserves, 79–80
- site address format, 36–37
- site identification, 35–36
- sounds for Circulation Desk, 88
- starting the application, 33
- State Standards, 443
- Text OPAC tab, 410–414
- TitlePeek, 57
- union catalog, 91–114
- user fields, 72
- Visual OPAC tab, 415–418
- WebCollection Plus, 434–456
- WebCollection Plus for
keyword/power/browse, 444
- Shelf List, 521
- shelf-checking option, in inventory, 222
- site setup. *See* setting up
- sounds
 - adding new sounds, 90
 - alerts while checking in, 152
 - barcode scanning, 127
 - Circulation Desk, 126–127
 - setting up for Circulation Desk, 88
- special characters. *See* diacritics
- special due dates, 143–144
- spine labels, 522–525
- spine/pocket labels
 - offsets, 523
 - vendor data, 523
- splitting a collection, 318–320
- standard numbers, searching Alliance Plus during
Process Misses, 398
- State Standards, setting up for WebCollection Plus,
443
- statistics
 - Category Statistics Report, 539–540
 - Circulation Statistics Report, 542–545
 - Collection Age by Call Number Report,
545–546
 - Collection Age by Subject Report, 547
 - Collection Statistics Report, 548–549
 - Collection Value Report, 550–551
 - Hold Statistics Report, 556
 - Patron Statistics Report, 577–578
 - printing patron circulation statistics, 133
 - system circulation statistics, 582
 - viewing copy, in Circulation Desk, 135
 - viewing patron, in Circulation Desk, 130–133
 - viewing title, in Circulation Desk, 135
- status. *See* copy status
- stop words, 459
- student records. *See* patron records
- sub locations
 - adding to copies in Cataloging, 286
 - adding to copies on import, 292–294
 - updating copies globally, 326
- subfields
 - See also* bibliographic records; tags
 - 'w' in authority records, 283–284
 - deleting, 275
 - diacritics in, 276
 - entering information, 275–277
 - inserting, 274–277
- subject headings, deleting globally, 332
- symbolologies. *See* barcodes

symbols. *See* diacritics

System Circulation Statistics Report, 582

System Information Report, 582–584

System Setup. *See* setting up

T

tags

See also authority records; bibliographic records

000 (Leader), 268

006, 271

007, 272

008, 272

521, 634

526, 635

for Accelerated Reader program, 635

adding to a template, 646

authority fixed-length, 281–282

authority, table of, 639–642

bibliographic, table of, 627–632

brief record range, 54–55

deleting, 266–267

deleting 6xx globally, 332

deleting 526, 856, 9xx globally, 334–335

diacritics in, 276

displayed in OPAC, table of, 638

used in Easy Editor, 632–633

editing subfields, 274–277

editing, in the template, 645

electronic resource in Easy Editor, 257

fixed data (008), 272–273

fixed-length, bibliographic, 268

indexing the 490, 56

indicators in, 274

inserting, 266–267

interest level (521), 634

leader (000), 268

material type (006), 271

for material types, 268

physical description (007), 272

for Reading Counts! program, 635–636

reading level (521), 634

reading program (526), 635–636

required by MARC Editor, 277

required in authority records, 284

searchable, table of, 637

templates, 643–646

variable-length tags (010–9XX), 273–277

Technical Support, contacting, 30

Telxon PHDs, 653–670

See also PHD; PHD messages

backup batteries, 669–670

batteries, 668–670

battery requirements, 653

charging batteries, 668

cleaning, 668

collecting inventory, copy, or patron data, 663–664

collecting remote circulations, 661–663

connecting, 655

differences between PHD+, PHD+ II, and PHD Laser+, 653–654

downloading the application, 655–656

erasing scans in, 664

error messages, 666

functions, 658

key commands, 659–660

keypad instructions, 656–661

low battery warnings, 661

main menu, 657

maintenance, 668–670

memory full message, 659

rebooting, 667–668

recycling batteries, 670

reversing the scanner heads, 661

scan totals, 658

scanning, 660–661

sounds, 661

storage, 668

supported barcodes, 654

troubleshooting, 664–667

updating the application, 655–656

TEM call number prefix, as used by Circulation Desk, 140

TEM circulation type, 46
as used by Circulation Desk, 140

templates for MARC records. *See* authority records; bibliographic records

Temporary category, as used by Circulation Desk, 140

temporary records, 139–141
circulation type, 46
vs. permanent records, 234

the. *See* nonfiling characters

tildes. *See* diacritics

time setup, 88

timeouts. *See* inactivity timeouts

Title List, 525–528

title records. *See* bibliographic records

TitlePeek
 in Cataloging, 250
 disabling in OPAC, 406
 in OPAC, 469
 proxy configuration, 405
 proxy configuration for Cataloging, 58
 setting up, 57
 in WebCollection Plus, 448

titles. *See* bibliographic records

Titles Added/Updated Report, 529–530

Titles by Category Report, 530–531

Titles With Duplicate Standard Numbers Report, 531–532

Titles Without Copies Report, 533–534

Titles Without Standard Numbers Report, 534–535

Titlewave, accessing the website, 237

toolbar options
 Cataloging, 236–240
 OPAC, 411–414
 Visual OPAC, 477–478
 WebCollection Plus, 438

toolbars, customizing in OPAC, 411

Transaction Tracker, setting up, 120–121

transactions. *See* circulation; remote circulation

troubleshooting
See also exception reports; utilities
 checking in, 152
 checking out, 144–146
 circulation, 136
 Dolphin PHDs, 679
 fines, 164
 holds, 174
 library database errors, 591–604
 patron picture imports, 206
 patron record imports, 202, 203
 reloading files, 600–601
 remote circulation, 182
 renewals, 150
 reserves, 174
 Telxon PHDs, 664–667
 WebCollection Plus, 456
 utilities, 591–604

trustee rights. *See* *Installation Guide*

type identifiers
 entering, in Circulation Desk, 123–126
 in barcodes, 38

Type-in Search, 480

U

umlauts. *See* diacritics

uninstalling FSC products. *See* *Installation Guide*

union catalog notes
 Accelerated Reader search, 242
 Add Titles to Book Cart, 347
 assigning copies on import, 295–297
 Bibliography Report, 502
 category search, 246
 Code table list, 505
 Copy Barcodes Report, 535
 copy information in OPAC, 465
 copy information pane, 250
 Data Source Setup, 247
 Delete Copies via Scanner, 337
 deleting subject headings by source, 333
 deleting titles when last copy is deleted, 57
 events in OPAC, 476
 Global Delete Lost Copies, 331
 Global Delete Missing Copies, 331
 Global Update Copy, 326
 importing by barcode, 296
 Individual Update, 330
 limitations in Cataloging toolbar setup, 236
 limitations on editing MARC records, 236
 limiter option in OPAC, 413
 limiting access in Cataloging, 240
 limiting searches by member, 242, 471
 MARC Magician, 349
 merging copies, 351
 MOC requirement for members, 36
 netLibrary eBooks, 468
 Reading Counts! search, 244
 searching by barcode, 241
 spine/pocket labels, 522
 System Information Report, 584
 Titles Added/Updated Report, 529
 Titles Without Copies Report, 533
 Titles Without Standard Numbers Report, 535
 Visual OPAC, 405

union catalogs
See also *Follett Data Exchange Guide*; members;
 WebCollection Plus for Union
 adding DX members, 106
 adding non-DX members, 102–106
 adding non-DX members' records, 112
 adding/editing copies, 287
 copying records from, 251
 deleting members, 112
 events setup, 98
 exporting MARC records, 317–322
 maintenance, 113

- reloading DX members, 112
 - searching, 247
 - and Selected database sources, 247
 - setting up groups, 101
 - setting up members, 101–112
 - tags not exchanged, 92
 - union information setup, 95–101
 - updating DX members, 112
- Union Data Exchange Server
- creating better bibliographic records, 95
 - error logging, 110
 - filtering rules, 94
 - matching rules, 95
 - participation levels, 93
 - tags not exchanged, 92
- Union Information page, in WebCollection Plus, 450
- unmarked inventory status, 211
- updating from an earlier version. *See Conversion Guide*
- URLs, Technical Support, 30
- Used/Unused Copy Barcodes Report, 535–536
- Used/Unused Patron Barcodes Report, 579–580
- user fields in patron records, 72
- for patron login password, 74
- user rights. *See Installation Guide*
- USMARC Organization Code. *See MARC Organization Code*
- utilities
- advanced, 598–602
 - backing up before running, 592
 - Check Database Integrity, 594
 - clearing the database, 602
 - diagnosing database problems, 594
 - Empty Database, 599, 602
 - enabling/disabling Data Exchange, 602
 - exception report messages, 603
 - exclusive access of the database, 592
 - interrupted, 592
 - maintenance, 593–598
 - Rebuild Database, 598, 599–600
 - Rebuild File Indexes, 594, 597–598
 - Rebuild Keywords, 594, 595
 - Rebuild MARC Headings, 594, 596
 - rebuilding library database indexes, 597–598
 - rebuilding MARC databases, 599–600
 - reindexing keywords, 595
 - reindexing MARC databases, 596–597
 - Reload File, 598, 600–601
 - when to run, 591
- Utilities (module)
- accessing, 592–593
 - description of, 591–592
 - password, 41
 - starting, 592–593
- ## V
- vendors
- adding in Acquisitions, 61
 - adding to copies in Cataloging, 286
 - adding to copies on import, 292
 - linking to copies, 327–329
 - report of, 507
 - updating copies globally, 326–329
- vertical file materials, cataloging tips, 353–354
- videorecordings, cataloging tips, 354–355
- Visual OPAC. *See OPAC*
- ## W
- WebCollection Plus
- See also WebCollection Plus Guide*
 - customizing background graphics, 437
 - Bookbag, 439
 - and browser settings, 433
 - changing the text and graphics, 436
 - command for Setup Information page, 432
 - customizing hold request forms, 442
 - customizing ILL request forms, 442
 - customizing optional pages, 450–451
 - customizing the logo, 437
 - events tab, 450
 - exiting the service, 431
 - Follett eBooks, 449
 - French, 454
 - graphics customization, 437
 - hold request forms, 440–442
 - ILL request forms, 440–442
 - importing Visual OPAC button sets, 447
 - inactivity timeouts, 446
 - Information page setup, 450
 - interest level, displaying, 449
 - Internet address, 432–433
 - keyword/power/browse search setup, 444
 - Library Information page, 450
 - logo customization, 437
 - multi-language, 454
 - password for Follett eBooks, 449

- password for Setup Information page, 432
 - Patron Empowerment in, 445
 - Patron Empowerment setup, 74
 - Patron Empowerment toolbar buttons, 439
 - QuickLinks, 448
 - reading level, displaying, 449
 - review sources, displaying, 449
 - rights, 431
 - setting up, 434–456
 - Spanish, 454
 - starting the service, 431
 - State Standards setup, 443
 - stopping the service, 431
 - testing your setup, 452–453
 - TitlePeek in, 448
 - toolbar options, 438
 - troubleshooting, 456
 - URL for search page, 432–433
 - URL for Setup Information page, 432
 - Visual OPAC setup, 447
 - Web Links page, 450, 451
- WebCollection Plus for Union
- See also WebCollection Plus Guide*
 - Availability button, 445
 - customizing hold and ILL request forms, 442
 - entering member URLs, 445
 - Information page setup, 450
 - member list, 441
 - searching by groups, 439
 - setting up, 435
 - setting up groups, 101
 - testing member connections, 453
 - testing member settings, 452
- WebPath Express
- and data exchange (DX), 92
 - deleting bibliographic records, 335–336
 - deleting bibliographic tags, 334
 - enabling hyperlinks, 57
 - importing authority records, 307–308
 - importing bibliographic records, 291
- websites
- cataloging tips, 366–367
 - link setup in WebCollection Plus, 448, 451
 - setting up links to in Visual OPAC, 423
- weeding a collection
- analyzing your collection, 323
 - Circulation Statistics Report, 542
 - Collection Age by Call Number Report, 545
 - Collection Age by Subject Report, 547
 - Collection Statistics Report, 548
 - deleting copies with a PHD, 342
 - deleting copies with a scanner, 337
 - deleting records after export, 316
 - deleting titles without copies automatically, 57
 - Titles Without Copies Report, 533
 - Weeding log, 344
- Weeding log, 344
- wildcards in searching, 459
-
- ## Y
- yearly statistics. *See* circulation statistics report; collection statistics report; statistics; system circulation statistics report
-
- ## Z
- Z39.50 Server. *See* Z39.50 Server Guide

Enhancement request form

Please complete and send to:
Follett Software Company
1391 Corporate Drive
McHenry, IL 60050-7041
Attn: Marketing Department



Phone: (800) 323-3397
FAX: (815) 344-8774
Email address:
marketing@fsc.follett.com

*An enhancement may be related to product functionality, a manual, or FSC service.
Please request only **one** enhancement per form.*

Name: _____ Title: _____ Phone #: _____

Institution (full name): _____ District: _____

Library Type: Elementary Jr. High High School Public
 Special _____

Address: _____ City: _____

County: _____ State/Province: _____ Zip/Postal Code: _____

Enhancement Request: Check **one** and indicate the product, manual, or service name.

Product Manual Service _____

Describe enhancement: _____

Have you seen this functionality/service offered by other companies? If so, where? _____

Explain how this enhancement would help you: _____

(You may photocopy this page. Please use other side if needed.)

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