Evergreen Cataloging Module
Evergreen Release 1.6
Equinox Software, Inc.

Legal Notice

Abstract

The cataloging module enables librarians to create and import bibliographic records; perform holdings maintenance; edit an item's status; and manage copies and records in buckets.

Preface

Typographic Conventions

This manual includes typographic conventions to draw your attention to specific items:

Bold

Items that are in **Bold** are the names of specific menu items or functions in the Evergreen ILS. For example, the process might describe a cataloger selecting **Import Record from Z39.50** or clicking **Submit**.

Italic

Items in italics are those that are entered in the ILS as part of an example. For example, *the title of the book,* might be entered to complete a catalog search.

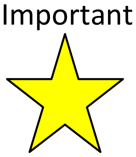
Notes

The following icon will draw your attention to additional information that you will need as you use the cataloging module:

Note

This icon represents a note. Notes are tips and tricks that will facilitate your use of the cataloging module. Ignoring a note will not have negative consequences, but using notes will assist you with the module.

Important



This icon represents important information, such as settings that apply at this point of use in the module. Ignoring starred information will cause irritation and problems for the user.

Chapter 1: Overview

1.1 Introduction

The cataloging module enables librarians to create and import bibliographic records; perform holdings maintenance; edit an item's status; and manage copies and records in buckets. This manual will provide you with descriptions of the features of this module, a Quick Start Guide that describes core cataloging processes in the module; and exercises for further practice.

1.2 Requirements

Before using this manual, you should be familiar with the process for searching the catalog via the staff client. To learn more about searching the catalog, visit the documentation Evergreen OPAC Manual at http://esilibrary.com. To understand this guide, you should also be familiar with core cataloging principles.

1.3 Using this Manual

This manual will provide you with general information about the cataloging module in Evergreen as well as a Quick Start Guide to get you started with the core cataloging functions. Before you begin to catalog, review the processes as they are described in the Quick Start Guide. Do not enter the data described in the Quick Start Guide; rather, read through the process and familiarize yourself with the screenshots. Then, for further practice, do the exercises that are listed in the section, Exercises for the Cataloging Module.

Chapter 2: Cataloging Functions and Screens

2.1 Locating Cataloging Functions

Cataloging functions are available from four locations within the ILS: 1) **Cataloging** menu, 2) the catalog search via the staff client, 3) the **Holdings Maintenance** screen, and 4) the **Display Item/Item Status** screen.

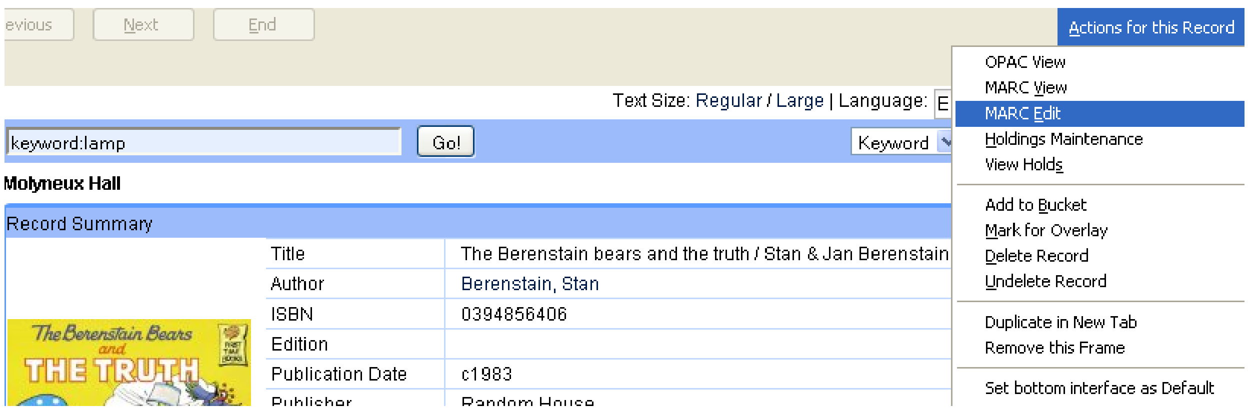
To access cataloging functions through the catalog in the staff client, click **Cataloging → Search the Catalog**. After retrieving a record, you should see a tab, **Actions for this Record**, in the top right corner of the frame. This menu contains many cataloging functions, including the link to the **Holdings Maintenance** screen.

In the **Cataloging** menu, the link, **Display Item**, will also take you to the **Item Status** screen that is available as a **Toggle Button**. In the top right corner of this screen is the link, **Actions for Catalogers**.

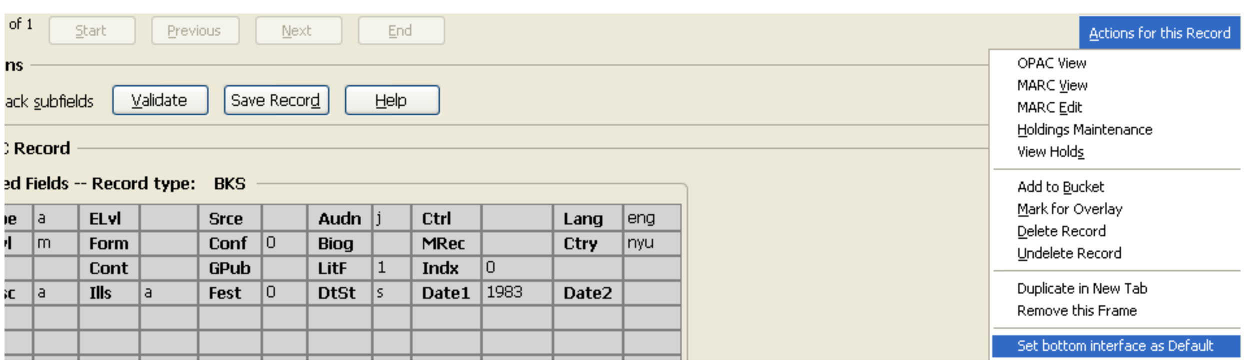
2.2 Screen Display for Catalogers

The following screen display options may be useful to catalogers:

1.**Set bottom interface as default** – This feature allows you to choose your results screen when you perform a search in the catalog. If you perform a catalog search via the staff client, the default results screen is the **OPAC View.** Other viewing options, including **MARC View** and **MARC Edit** (which opens the **MARC Editor**) are available in the top right tab, **Actions for this Record**. Highlight the view that you want to display.

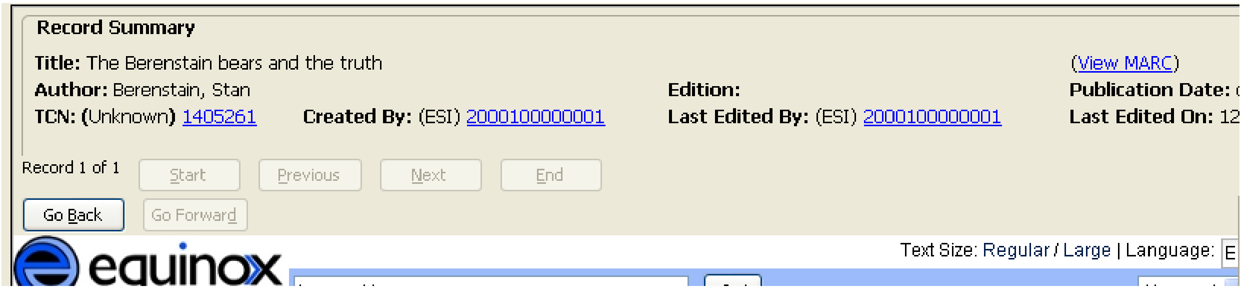


If this is your preferred view, then highlight **Actions for this Record → Set bottom interface as Default**.



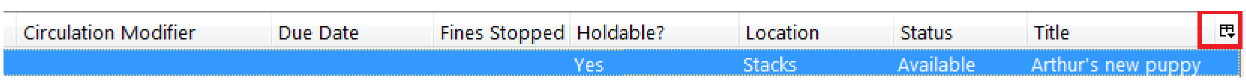
The next catalog search will display results in the **MARC Editor**. If you want to change screens, simply click another view.

2. **Remove Frame**— A **Record Summary** frame appears above each record that is retrieved.



To remove this frame and view only the record, click **Actions for this Record → Remove this Frame**. This action will remove the frame only for the record that you are viewing. If you perform another search, the frame will return.

3. **Column Picker** – The column picker appears throughout Evergreen screens, including the **Item Status** screen. To customize the columns that appear, click the column picker, and add and remove the columns that you would like to display.

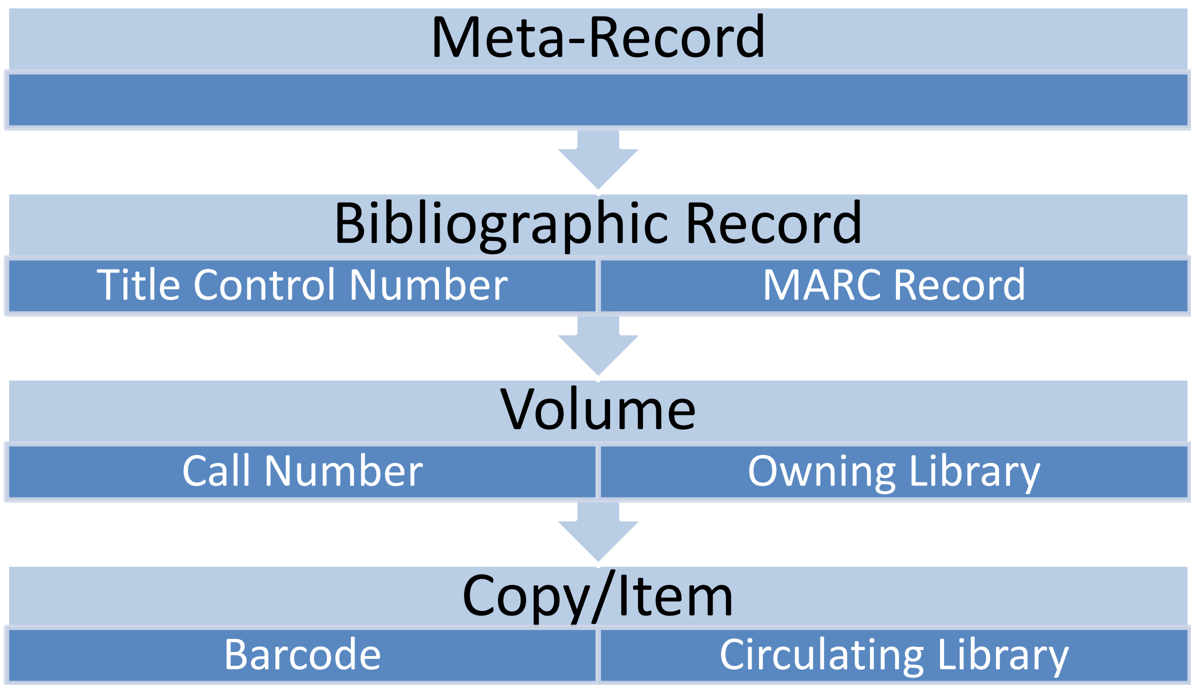


To save your column configuration, click **Actions for Catalogers → Save Columns**, or click **Save Column Configuration**, in the bottom left corner in the List Actions drop down menu. These columns will be saved to your workstation, not your login. After you save your columns, any staff member who logs in to that workstation will have the same column configuration that you saved.

Chapter 3: Cataloging Basics

3.1 Record Structure

To create the item information, with its bibliographic record, call number, and copy information, that a patron sees, the Evergreen ILS connects and stores information about an item at various levels. The top level is the meta-record. A meta-record is a group of bibliographic records. The meta-record groups multiple formats and editions for a title. For example, the meta-record groups the book and CD formats of *Harry Potter and the Prisoner of Azkaban*. The next level is the bibliographic record, which stores the TCN and the MARC record. The volume level stores the call number and the owning library. Finally, the Copy/Item level stores the barcode and the circulating library. The circulating library may be identical to or different from the owning library.



NOTE The terms “copy” and “item” are interchangeable.

3.2 Creating and Importing MARC Records

To add records to the ILS, you can create a new record; import a record via Z39.50 or batch import MARC records. To create records, you will use the **MARC Editor**.

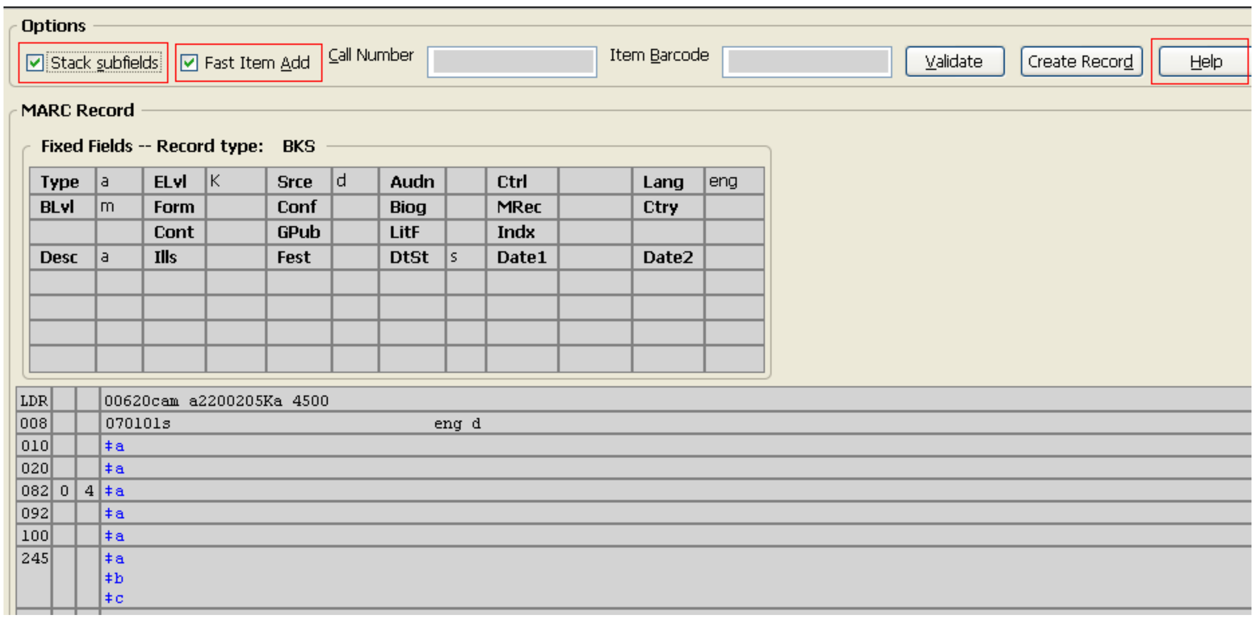
3.2.1 Using the MARC Editor

The following are tips and tricks to get the most out of the **MARC Editor**:

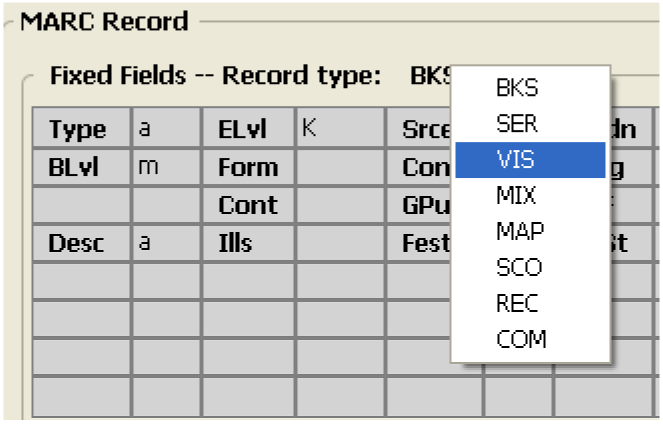
The **Options** at the top of the **MARC Editor** allow you **Stack Subfields** so that you can display subfields vertically rather than horizontally.

The **Fast Item Add** feature allows you to quickly and easily add a call number and barcode (volume and copy) to the MARC record. If this information is not entered, then the ILS will not add copies at this stage. After the record has been created/imported, then you can add copies through the **Holdings Maintenance** or **Item Status** screen.

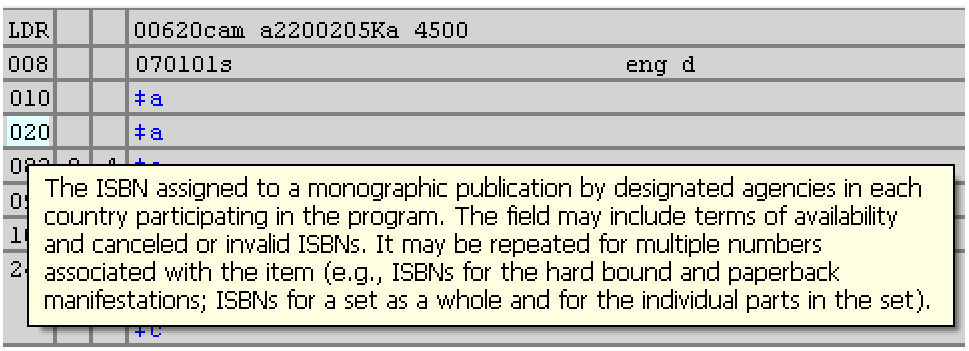
The **Help** button lists the shortcuts available in the cataloging module.



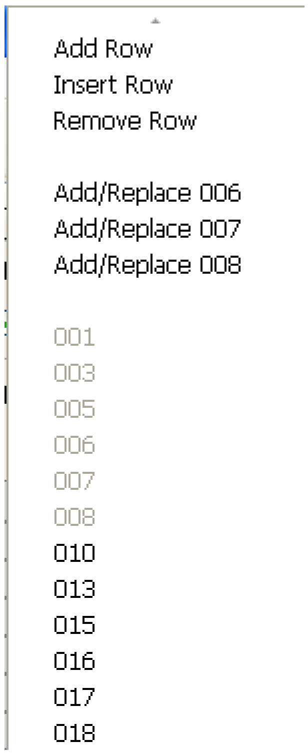
If you want to change the template, right click over the current **Record type**. Other template options appear. Highlight the template that you want to implement. However, the fixed fields will change, but the data in those fields does not.



To identify the purpose of tags or fields, mouse over to find a definition:



To change or add a tag, right click over any tag:



NOTE There is no way to numerically order tags in the MARC record.

NOTE The MARC Editor supports Unicode standards, including scripts in the 880 fields.

3.2.2 Shadowing/Revealing Records

If a record does not have physical copies attached to it, then the record will display in the staff client, but it will not display in the OPAC. Thus, adding electronic resources, such as downloadable books, e-journals, or websites, to the catalog can pose challenges for catalogers who want the items to appear in the OPAC despite their lack of physical holdings. To make an electronic resource transcendent, Evergreen allows you to add holdings information with an 856 tag:

1. To add the web location for electronic resources, enter an 856 tag into the MARC record with indicators 4 (including HTTP) and the appropriate second indicator.

2. You can also add a subfield u for the Uniform Resource Identifier and a subfield z for a public note. The note may specify, for example, that a patron must be a patron of the Etheridge Public Library system to access this electronic item.

3. You can also add a subfield 9 to indicate the branch that provides access to this resource. For example, if an item was purchased by the Charlton Branch, then search results for this item would reveal it only at the branch, the system, or the consortium level. A search for holdings at other branches or systems would not reveal this record.

3.3 Adding Volumes and Copies

You can add volumes and copies by using the **Fast Item Add** feature during the cataloging process. However, you can always add volumes and copies at any time.

NOTE

Make sure you add volumes (call numbers) before you add copies (barcodes).

You can add volumes in two ways:

1. If you have a bib record that has volumes and copies: Find the bib record in the catalog, and copy the barcode of a copy attached to that record. Enter the barcode into the **Item Status** screen, and click **Actions for Catalogers → Add Volumes.**

2. If you have a bib record with no volumes or copies: Find the bib record in the catalog, and click **Actions for this Record → Holdings Maintenance.** Select the library to which you would like to add the volume, and click **Actions for Selected Rows → Add Volumes**.

You can add items to volumes without copies or volumes with existing copies. You can add items in either case in two ways:

1. Search the catalog for a record. Retrieve the record, and click **Actions for this Record → Holdings Maintenance → Add Items**.

2. Click **Item Status**. Enter the barcode, and click **Actions for Catalogers → Add Items.**

Adding more than 2,000 items to a bib record will break the bib record.

3.3.1 Using the Copy Editor

When you add an item, the ILS enables you to edit the item's characteristics or attributes. You can edit multiple copies at once if you add multiple copies in the **Volume and Copy Editor**.

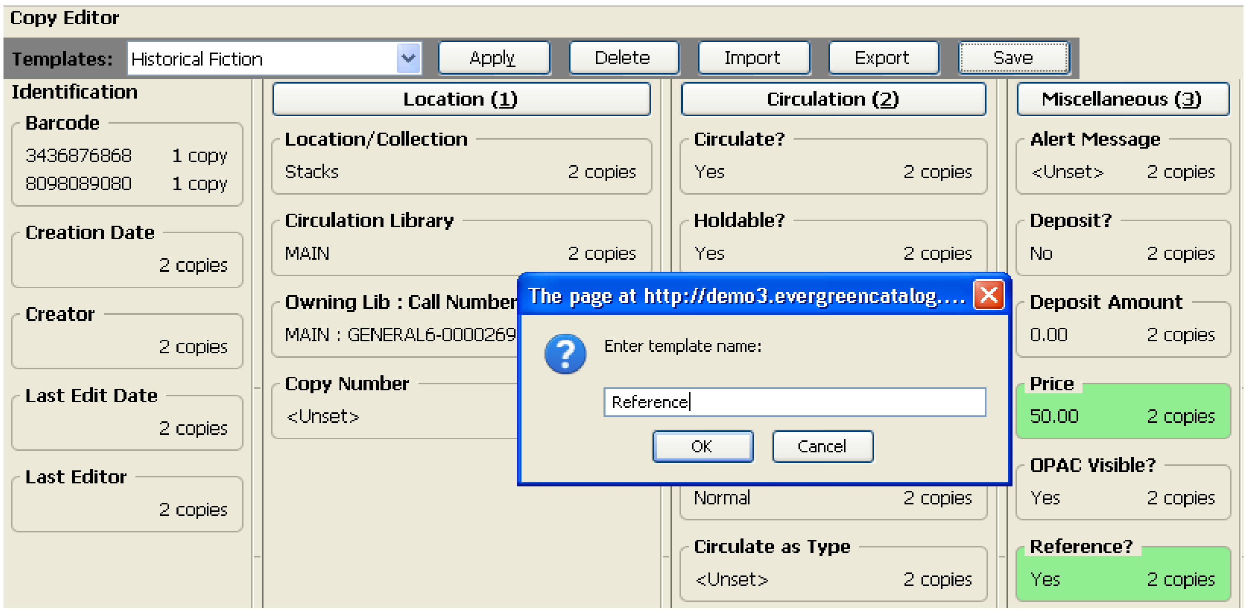
You can edit these attributes for each item, or you can save templates for specific groups of items. For example, you may want to save a template for reference materials. To create a template:

1. Open the **Copy Editor**

2. Make desired changes to the item's attributes.

3. Click **Save**.

4. A box will open that will allow you to enter a template name. Enter the title, and click **OK**.



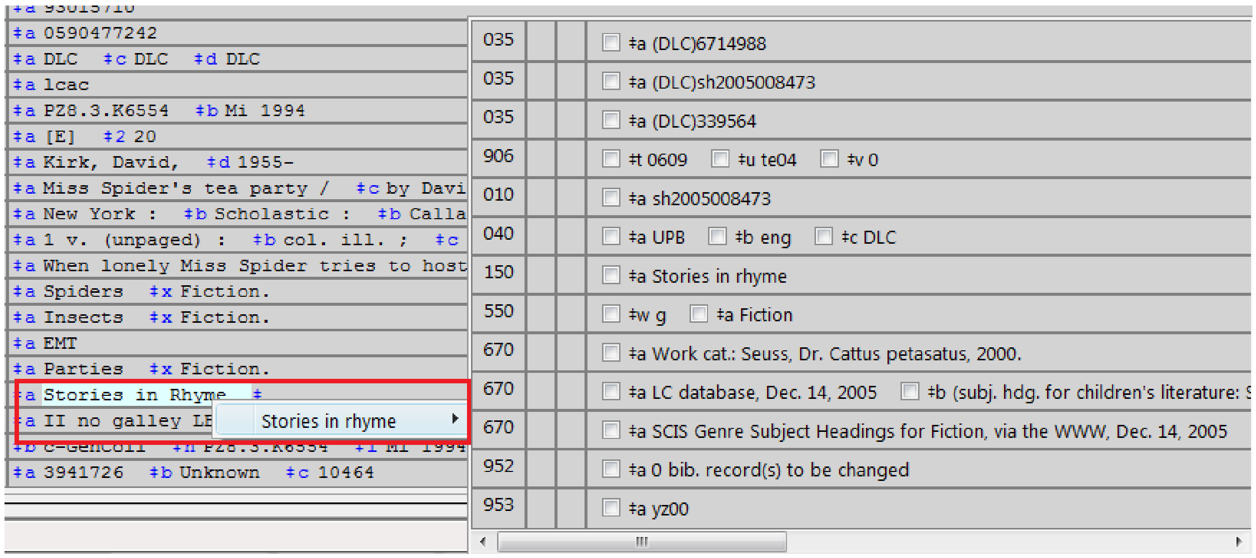
5. A message will confirm that the template has been saved.

6. To apply a template to items, choose from the templates drop down box in the upper right corner of the **Copy Editor**, and click **Apply**.

3.4 Using Authority Records

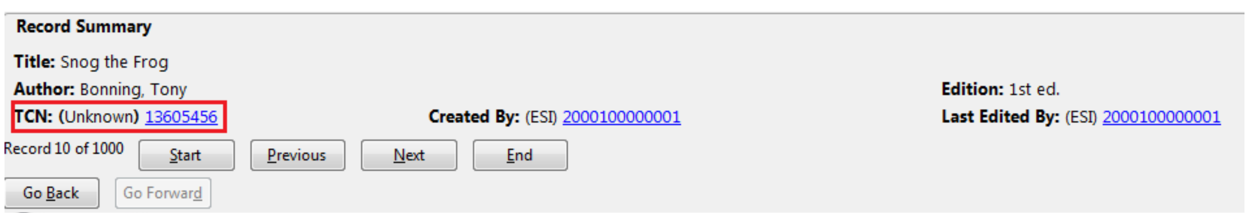
The Evergreen ILS does not have an Authority Module in Release 1.6. To validate a record, you must import authority records. When you validate a new record, the ILS will check against imported authority records. You cannot create authority records in this release of Evergreen.

When you validate a record, you may right click over the validated heading to view more information about the authority, such as cross-references. You can check the boxes to replace the information in the field that you have selected.



3.4.1 Title Control Numbers (TCN) and Record Identifiers (Record ID)

The Title Control Number (TCN) is a unique identifying number that is assigned to a catalog record by an authoritative cataloging organization, such as the Library of Congress. This number might also be called the accession ID. A record's TCN is located in the **Record Summary** frame that always appears at the top of a record. If the source of the TCN is known, it will appear in parentheses beside the TCN. If the source is not known, then **(Unknown)** will appear beside the TCN.

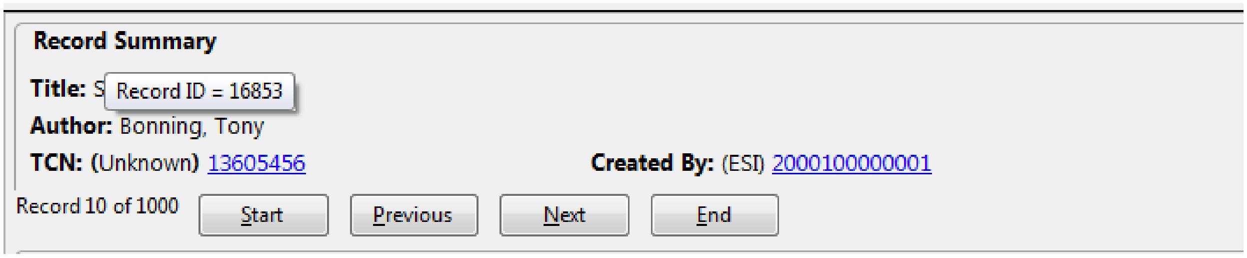


To retrieve a record by TCN, select **Cataloging → Retrieve Record by TCN**, and enter the TCN.

NOTE

The TCN is often used as a match point when importing records. If an imported record has a TCN that matches the TCN of a record in the database, then Evergreen will alert you to a possible collision. The ILS will search for the TCN in the 001 field first, followed by 901, 020, 022, 010, and 035.

The Record ID is the unique number that the Evergreen ILS assigns to each record. This number can be found by hovering over the phrase **Record Summary** at the top of the page.



3.5 Overlaying Records

You can overlay records by searching the catalog for a record, marking the item for overlay by clicking **Actions for this Record → Mark for Overlay**. Then, you can import the record via Z39.50. The ILS will recognize that the item has been marked for overlay (See a complete description of this process in 4.4)

However, if you attempt to import a record via Z39.50 and do not know that an identical record exists in the catalog, the ILS will warn you that a possible match exists and will ask you if you want to overlay the catalog record with the record that you are importing.

3.6 Deleting Records

Records in Evergreen are never deleted; they are only hidden. Thus, when a record is deleted in Evergreen, you can no longer retrieve it by searching the catalog, but you can retrieve a record by searching for the TCN or the Record ID.

You can delete records in one of three ways:

1. Search the catalog to retrieve a record. Then click **Actions for this Record →Delete Record**.

2. Open the **Item Status** screen. Enter a barcode, and click **Actions for Catalogers→ Delete Items.**

3. Place a record in a bucket. The **Bucket View** gives you the option to delete records that are in the buckets.

If you delete a record by mistake, you can **Undelete** it by retrieving the record and clicking **Actions for this Record →Undelete Record**.

3.7 Retrieving Records

Records can be retrieved in one of four ways: 1) by searching the catalog 2) by clicking **Cataloging → Retrieve Record by TCN** 3) by clicking **Cataloging → Retrieve Record by Record ID**, and 4) by entering the barcode in the **Item Status** screen. You can also retrieve the last record that you viewed by clicking **Cataloging → Retrieve Last Record**. For a discussion of TCNs and Record IDs, look at section 3.5.1.

3.8 Using Buckets

Buckets allow you to organize and save lists of records and items that you want to amend or review at a later date. Buckets that you create are tied to your login, so when you log in to the staff client, you are able to see only the buckets that you created. However, you can share buckets with others and view their buckets.

Record buckets allow you to store and organize records. Copy buckets enable you to store specific copies. For example, you may want to create a weeding bucket so that you could delete copies that need to be weeded in batch.

For more information on buckets, explore 4.7.1 and 4.7.2.

Chapter 4: Quick Start Guide

4.1 Create new MARC Record

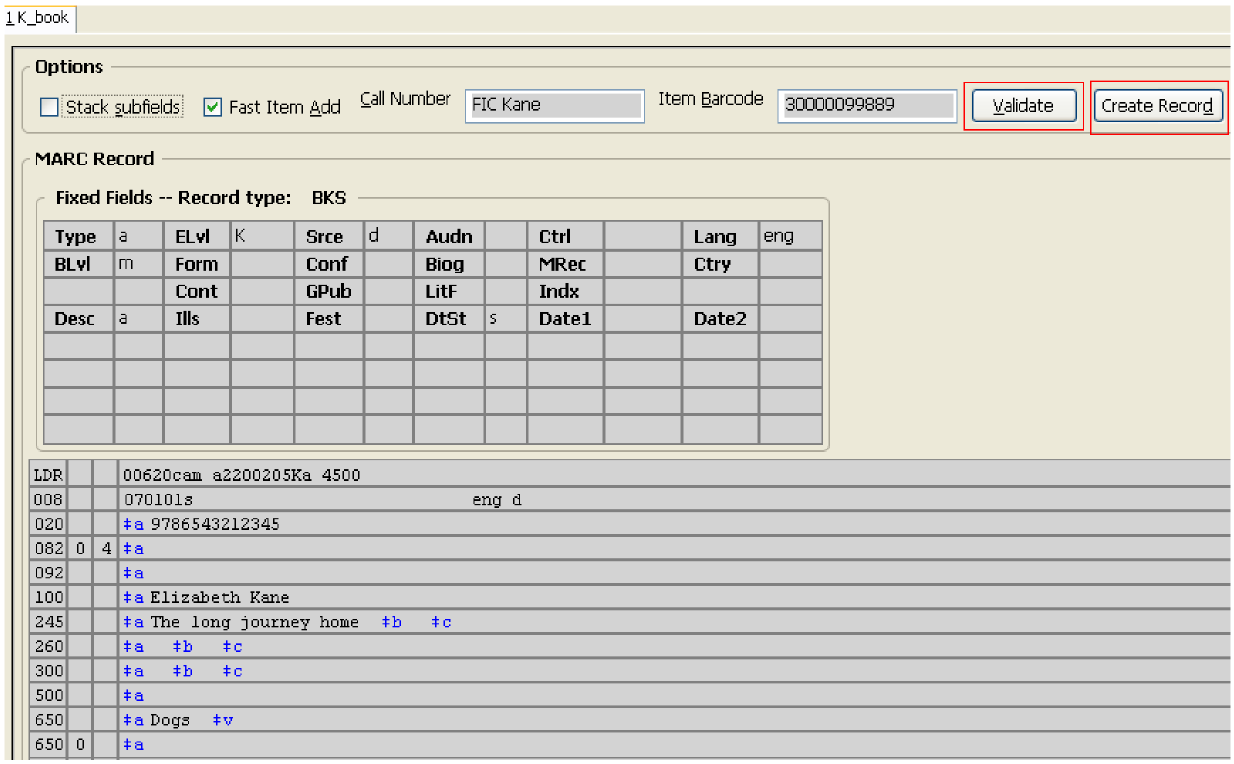
1. Click **Cataloging → Create New MARC record**

2. The option to load the book template appears. Click **Load**.

3. The empty MARC record will appear. This screen is called the **MARC Editor** and will be discussed further in 3.2.1. Enter the desired information into the MARC Record.

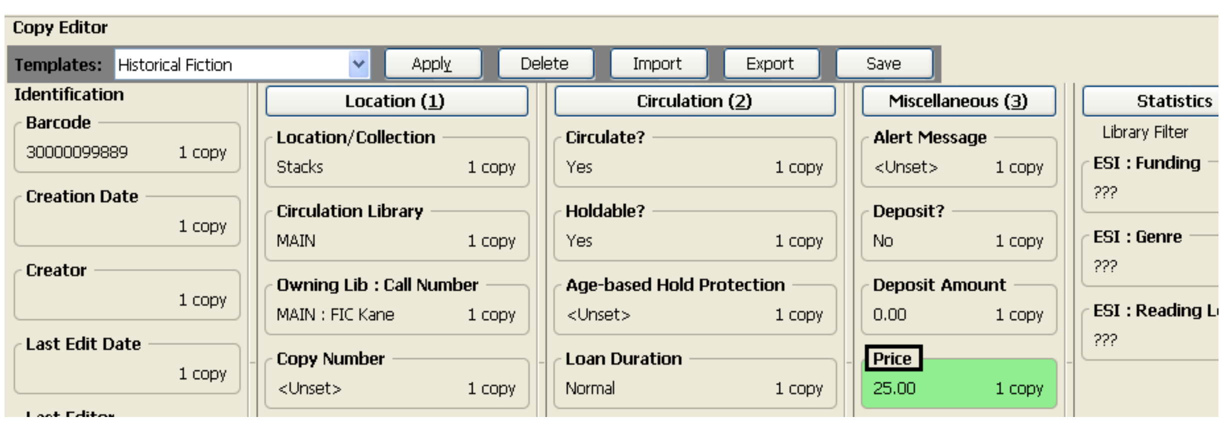
4. To validate the record against authority records, click **Validate**.

5. To create the record, click **Create Record**.

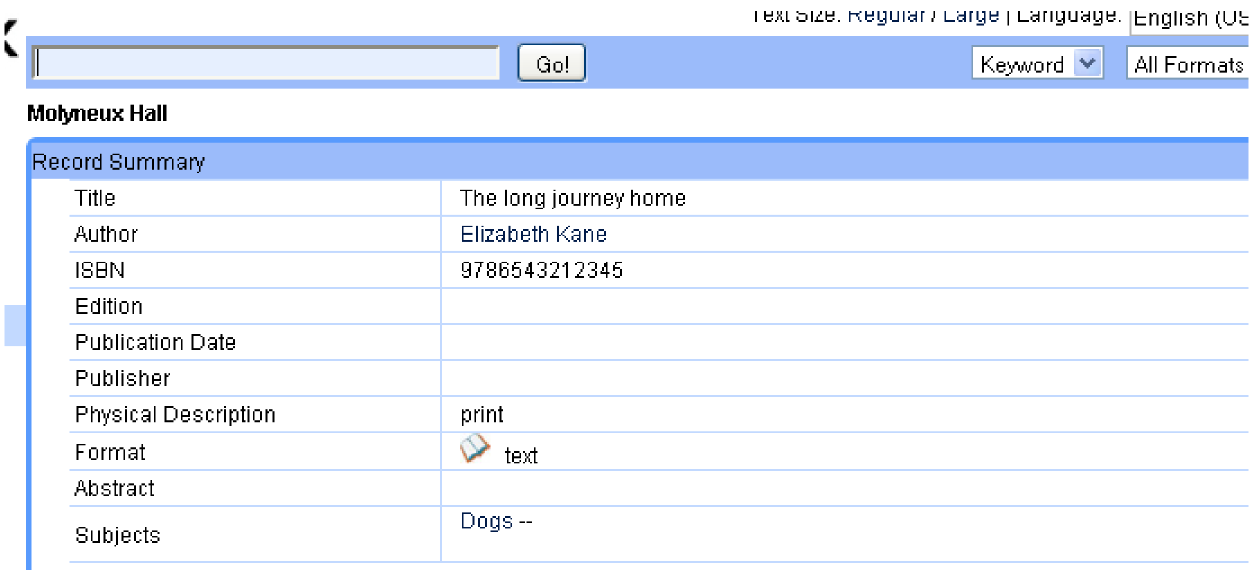


6. If you entered a call number and barcode in the **Fast Item Add**, then you will be taken to the **Copy Editor**. If you did not enter the call number and barcode, then you will go directly to the catalog.

7. The **Copy Editor** enables you to edit the item's attributes. Any changes that you make will appear in green. After you have finished making changes, click **Create Copies** in the bottom right corner. The **Copy Editor** is discussed in more detail in 3.4.1.



8. The title appears in the catalog via the staff client.



4.2 Import Bibliographic Records

4.2.1 Import via Z39.50

Many catalogers will use Z39.50 to import records. In this example, we will search for a record for a book about Emily Bronte's Wuthering Heights. We will find the record using a Z39.50 server, edit the record, validate it, and import it into the catalog. We will then edit copy information using the **Copy Editor**.

1. Select **Cataloging → Import Record from Z39.50**

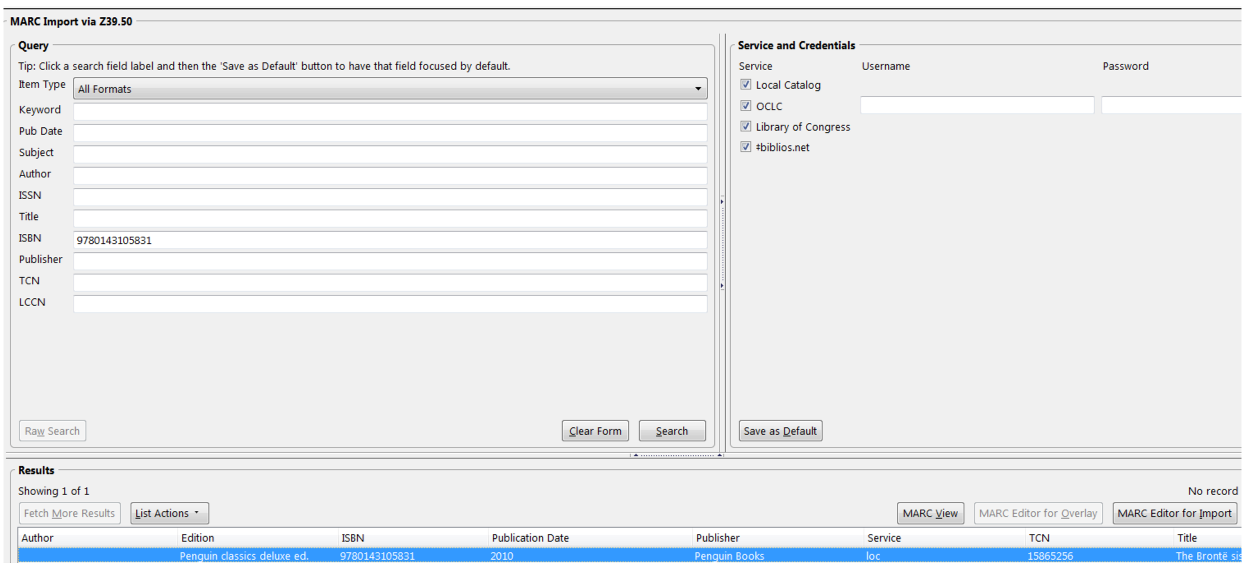
2. The **MARC Import via Z39.50** screen will appear. In the top half of the screen, you will enter your query and select the services to which you would like to connect. In the **Service and Credentials** box, check the boxes of all of the Z39.50 servers to which you would like to connect. Make sure that you check **Local Catalog** to check the catalog for any existing records in your catalog.

Note A staff member with administrative privileges can configure the Z39.50 servers in **Administration →Server Administration →Z39.50 Servers**.

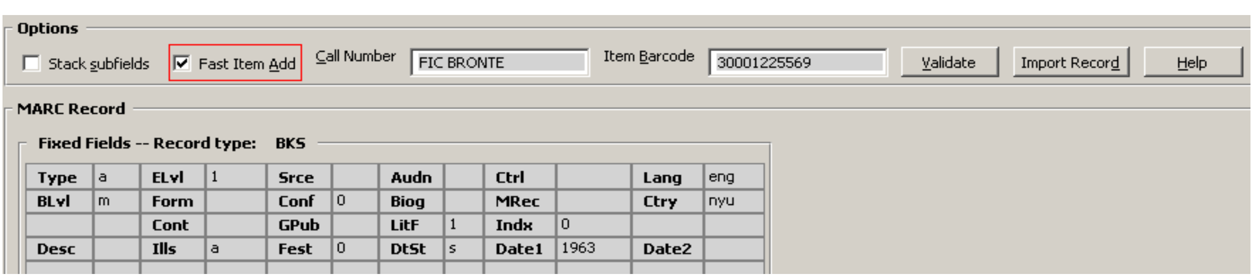
3. The left side of the top half of the screen will repopulate with blanks after you have checked the boxes in **Service and Credentials**. In the **Item Type** drop down box, leave **All Formats** selected**.** Enter an ISBN or other identifying information to find the record that you need.

4. The results of your search will appear in the bottom pane. The pane will display only a few results at a time. If you do not see the record for which you were searching, click **Fetch More Results** to view other results. You can **Hide Top Pane** to view more results at once.

5. Select the record that you want to import. Select **MARC Editor for Import** in the top right corner of the bottom half of the screen.

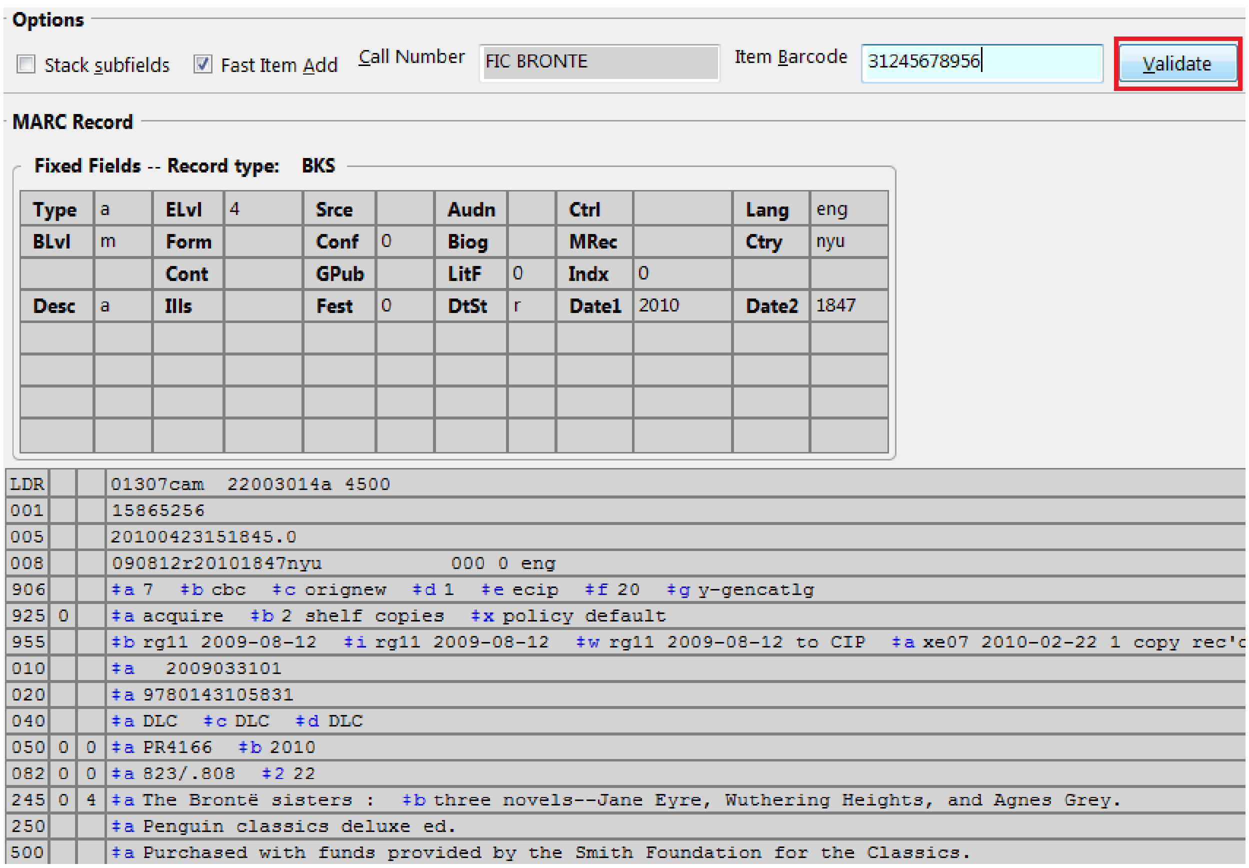


6. The **MARC Editor** will open and the record will appear. The **Fast Item Add** feature allows you add a barcode and call number quickly and easily and will create a copy for you. Check the **Fast Item Add** box. **Call Number** and **Item Barcode** boxes appear. Enter a call number and an item barcode. If you do not enter this information, you must enter volume and copy information after the record has been imported.

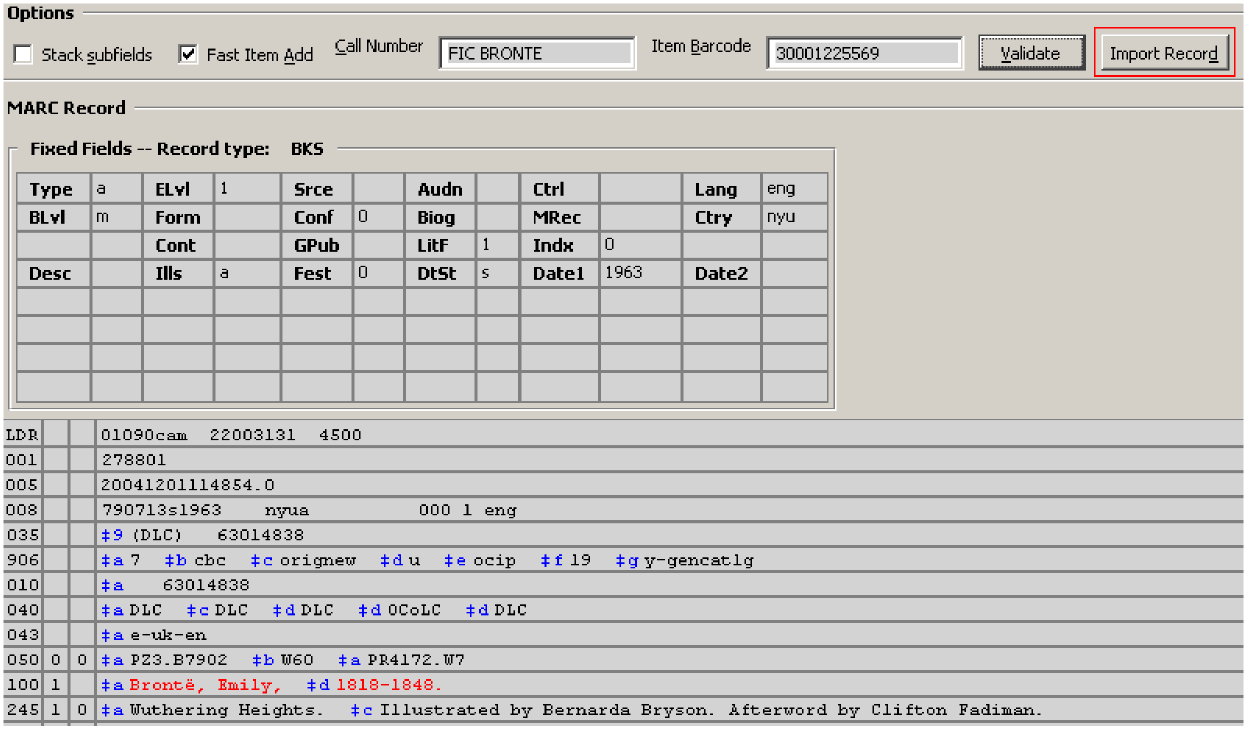


7. Next, we will edit the record and validate it. We will add a note in the 500 field indicating that the item was purchased with funds provided by the Smith Foundation for the Classics. To add a field, right-click in the field beneath where you want the item to appear. Click **Insert Row** on the menu that appears.

8. A blank field will appear in the MARC record. Enter a 500 and the text: **Purchased with funds provided by the Smith Foundation for the Classics.** Then click **Validate**.



9. Any field with information that cannot be validated appears in red. This may occur even if the information contained in the fields is correct if the ILS does not contain the authority records needed to validate the information. After the MARC record has been amended, proceed with importing the record. Click **Import Record**.

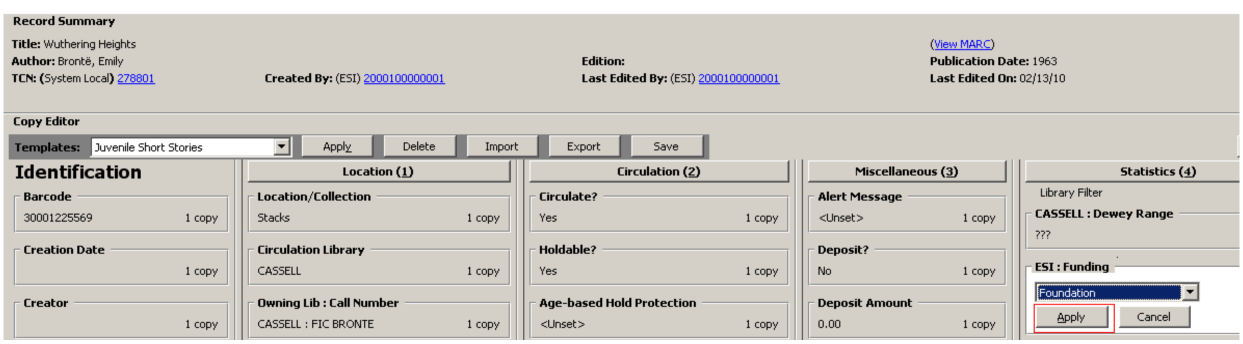


10. A message will appear to confirm that you have imported the record. Click **OK**.

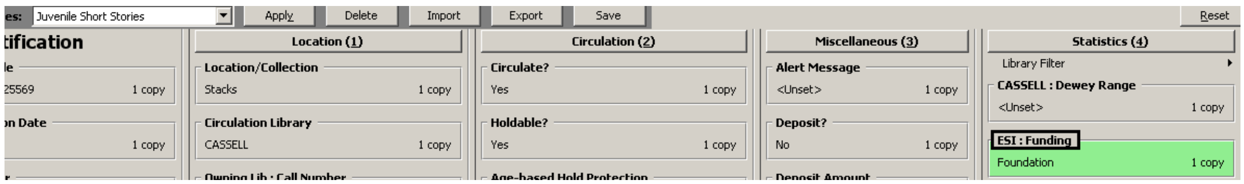
Note

If you do not enter a barcode in the **Fast Item Add** boxes, then you will skip Steps 11-14. You can add copies through the catalog later by searching for the bib record and selecting **Actions for this Record → Holdings Maintenance** to add copies.

11. The **Copy Editor** will now open. This feature allows you to edit information about the copy that you are adding, including locations, circulation rules, and other necessary information. We will edit only the funding information in this example. In the **Statistics (4)** column, select **Foundation** from the **ESI:Funding** drop down box. Click **Apply**.



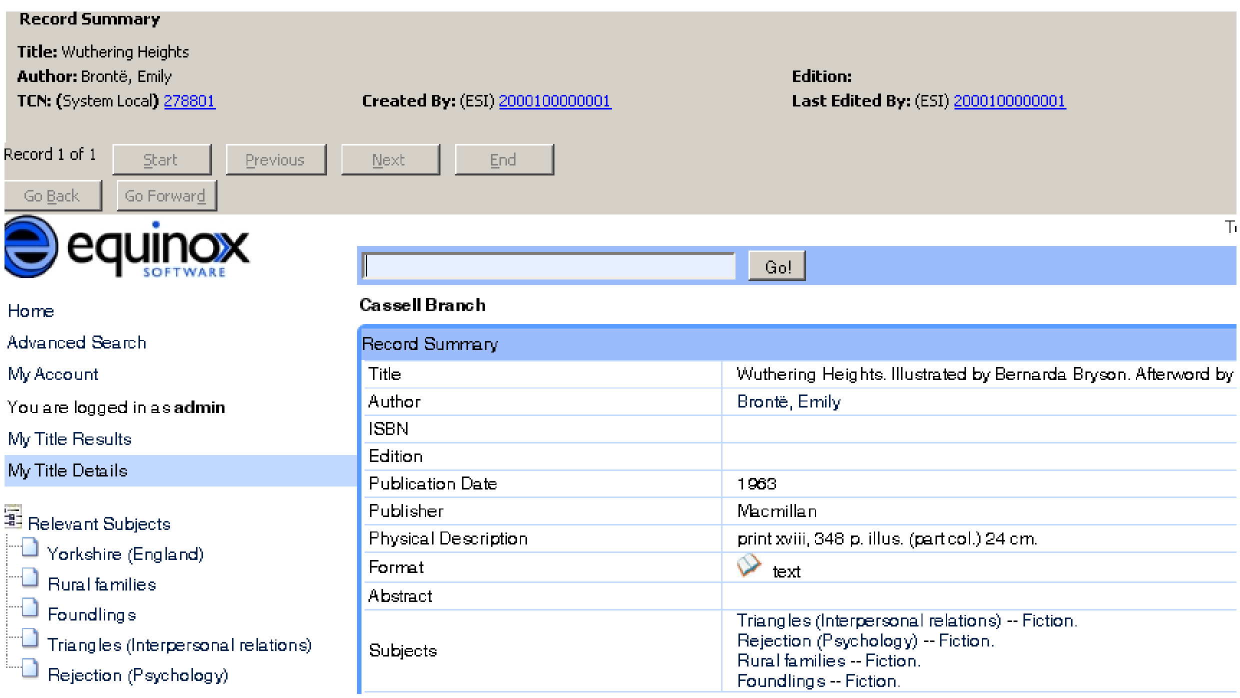
12. The screen will refresh to show the change(s) that were made. The change appears in green.



13. To save the copy information, click **Create Copies** in the bottom right corner.

14. A message that confirms the changes will appear. Click **OK**.

15. The item has been cataloged and will appear as it does in the OPAC.



Note

If you attempt to bring in a duplicate record via Z39.50, then you will be alerted to the potential collision. You will be asked if you want to overlay the matching record, cancel the import, or import the record with an alternate TCN.

4.2.2 MARC Batch Import

You can use this function to batch import both bibliographic and authority records.

1. Click **Cataloging → MARC Batch Import/Export.** The **MARC Batch Importer/Exporter** opens.

2. Choose a **record type**: Bibliographic or Authority.

3. Create a new **upload queue** or choose an existing upload queue.

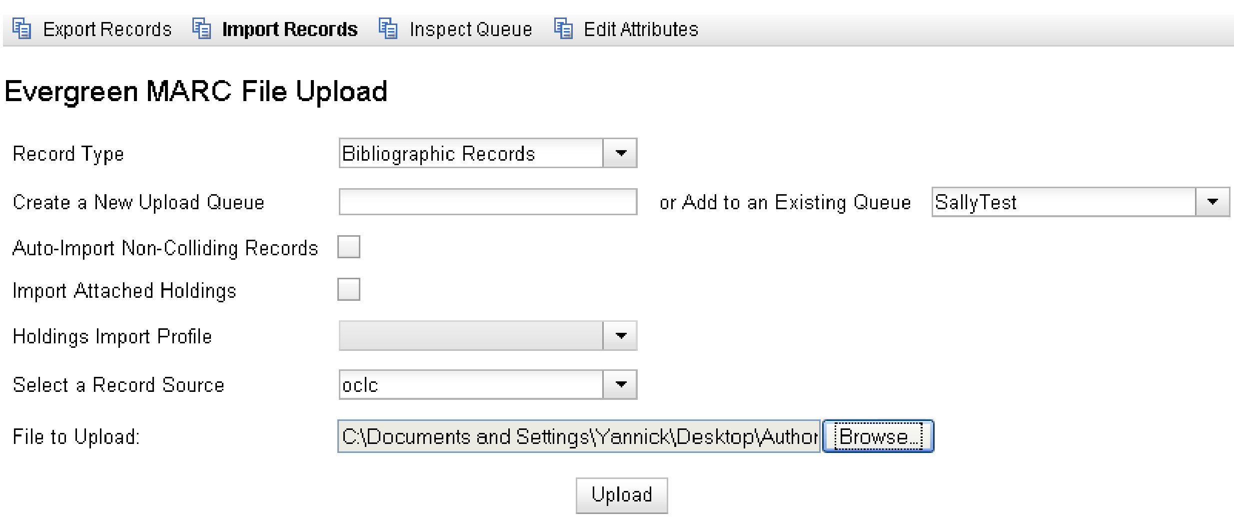
4. Check the box to **Auto-Import Non Colliding Records** if you want to automatically import records that do not have a matching record in the database.

5. Check the box to **Import Attached Holdings** if you want to import holdings attached to the record. You can only import from the fields that are available in the **Holdings Import Profile** below.

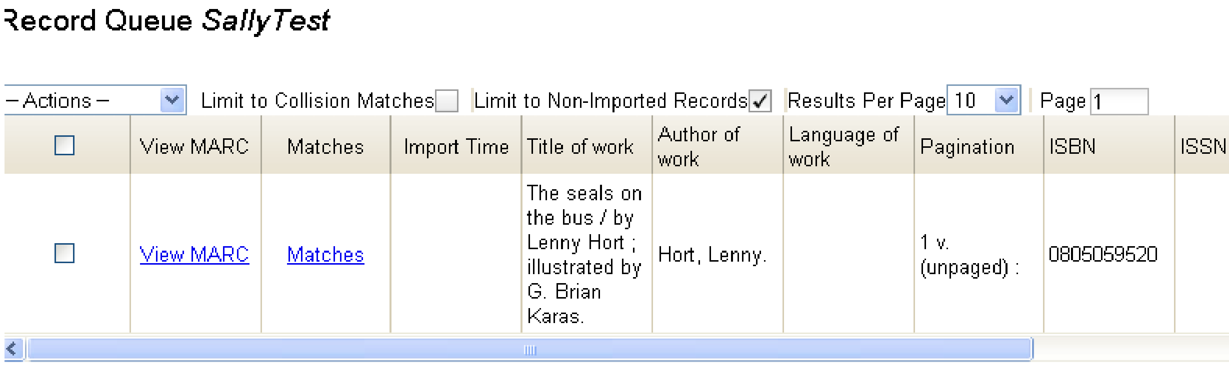
6. Choose the field that contains holdings information from the **Holdings Import Profile** if you want holdings information.

7. Select a **record source**.

8. Upload the MARC record(s). When the records finish loading, you will be taken to your queue.



9. You can view the MARC record of the item that you imported, and, if there are matching records, you can click **Matches** to view collision points.


Record Queue *SallyTest*

– Actions – | Limit to Collision Matches | Limit to Non-Imported Records | Results Per Page 10 | Page 1

	View MARC	Matches	Import Time	Title of work	Author of work	Language of work	Pagination	ISBN	ISSN
☐	View MARC	Matches		The seals on the bus / by Lenny Hort ; illustrated by G. Brian Karas.	Hort, Lenny.		1 v. (unpaged) :	0805059520	

10. In this example, the imported record matches a record that is already in the catalog on two match points: the ISBN and the TCN. If you are satisfied that the record in the catalog matches the record that you have imported, then you can overlay the old record with the new one by clicking **Overlay Target**.

11. Next, click **Back to Import Queue**.

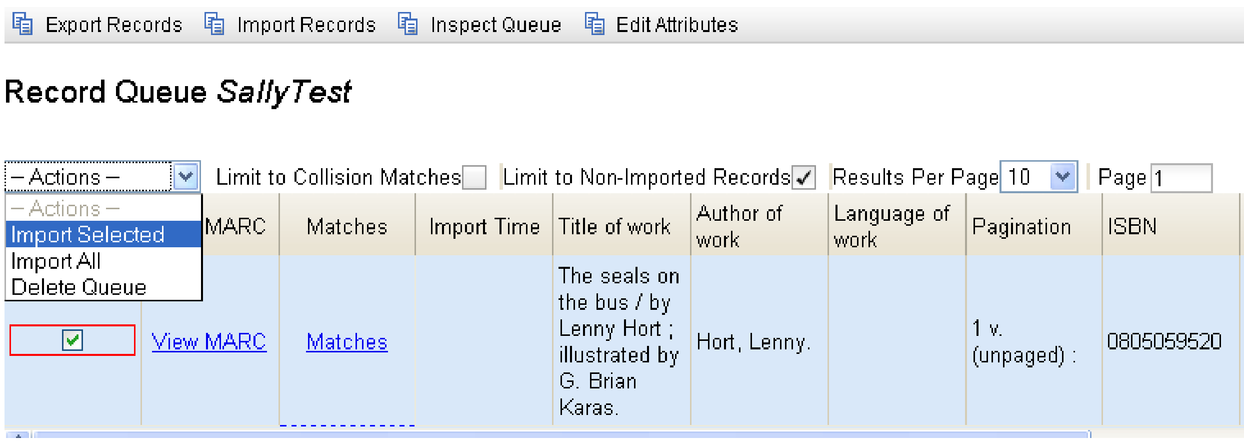

Export Records | Import Records | Inspect Queue | Edit Attributes

Import Matches

Back To Import Queue

Overlay Target	Source Match Point	Destination Match Point	ID	View MARC	Creator	Create Date	Last Edit Date	Source	TCN Source	TCN Value
☑	isbn	isbn	16807	View MARC	admin	12/21/09	12/21/09	101	Unknown	4995957
☐	rec_identifier	tcn_value	16807	View MARC	admin	12/21/09	12/21/09	101	Unknown	4995957

12. To overlay the current record with the new record, click **Actions → Import Selected**.



13. After importing the record, the record will disappear from the queue unless you uncheck the option to **Limit to Non-Imported Records**.

4.3 Import Authority Records

Follow the directions in 4.2.2 with the exception of choosing Authority rather than Bibliographic records.

4.4 Overlay Records

When catalogers find a record in the catalog that is insufficient to the needs of the patrons, such as a brief record for a title that is on order, they may want to find a new record and overlay the old record with the new, better record. First, find the record in the catalog that needs to be replaced and **Mark for Overlay**. Then, perform a Z39.50 search for the new record. The Z39.50 search will provide you with more match points than the batch import. Import the new record and overlay the record that is currently in the catalog.

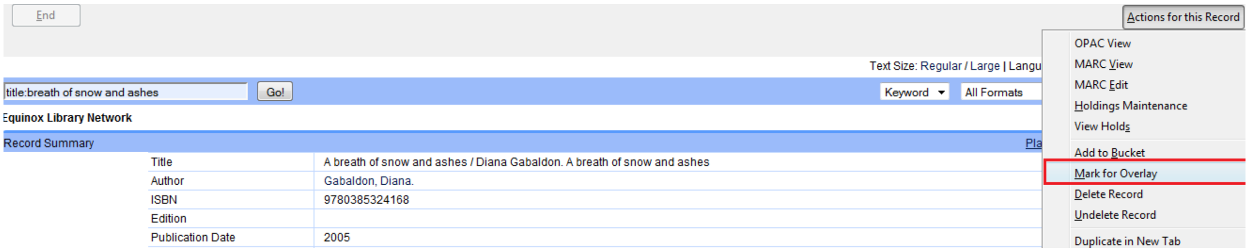
1. Select **Cataloging** → **Search the Catalog**

2. Enter an ISBN, and click **Submit Search**.

3. The results screen should appear. Click the title of the item to display the **Record Summary**.

4. The **Record Summary** will appear. In the right corner of the screen, click **Actions for this Record**.

5. A drop down menu will appear. Select **Mark for Overlay**.

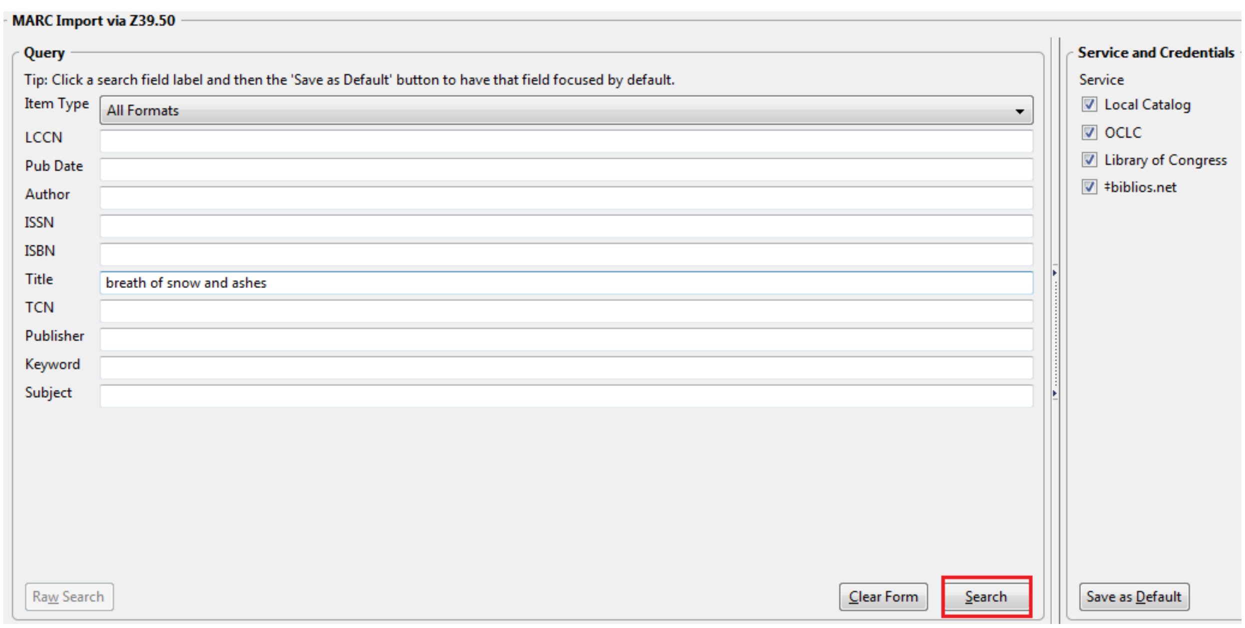


6. A confirmation screen will appear. Click **OK**. The item has now been marked for overlay.

7. Now, import a better record to replace the current record. Select **Cataloging → Import Record from Z39.50.**

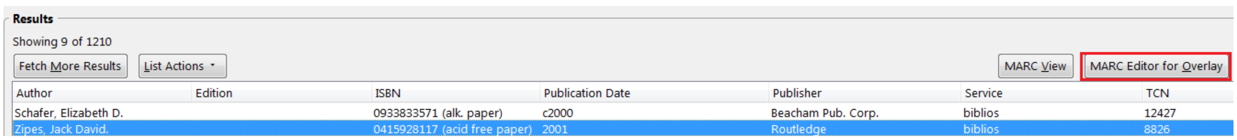
8. The **MARC Import via Z39.50** screen will appear. In the top half of the screen, you will enter your query and select the databases to which you would like to connect. In the **Service and Credentials** box, check the boxes of all of the services to connect to them.

9. In the left pane, leave **All Formats** selected in the **Item Type** menu. Enter identyifying information in the fields. Click **Search.**



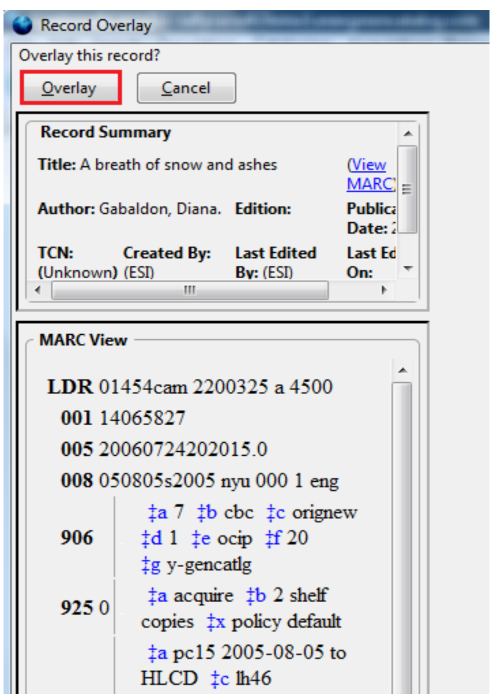
10. In the bottom pane, the results of your search should appear. Notice the message in the right corner above the pane: **Record with TCN 14065827 marked for overlay**. The ILS recognizes that you just marked a title for overlay.

11. Select the new record that you wish to import, and click **MARC Editor for Overlay**.



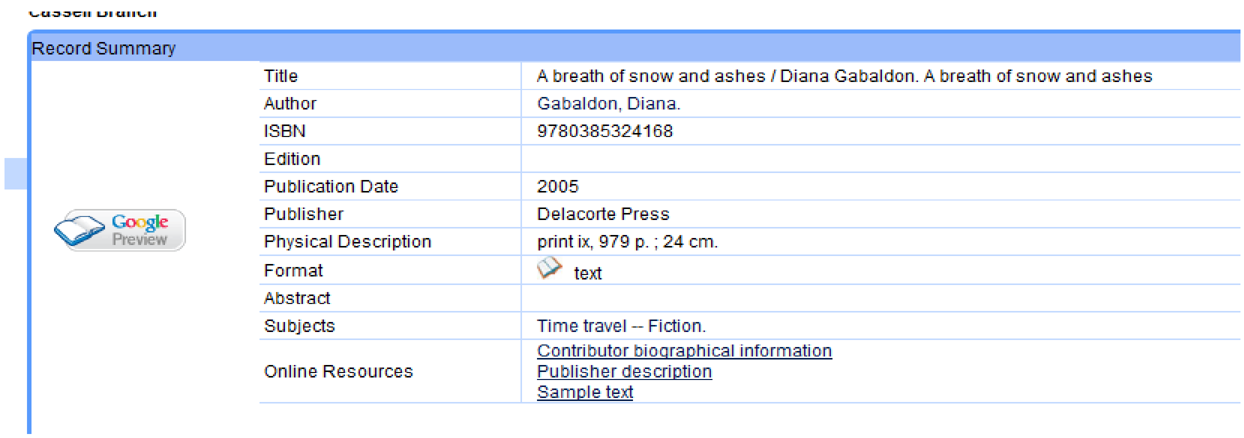
12. The MARC Editor will appear. Select **Overlay Record**.

13. The **Record Overlay** screen will appear. The **Record Summary** and **MARC View** will appear, and you are asked if you want to overlay the record that is currently in the catalog. Select **Overlay.**



14. You will receive a message that the record was successfully overlaid. Click **OK.**

15. After clicking **OK**, the new **Record Summary** will appear as it would in the OPAC. The process is complete.



Record Summary	
Title	A breath of snow and ashes / Diana Gabaldon. A breath of snow and ashes
Author	Gabaldon, Diana.
ISBN	9780385324168
Edition	
Publication Date	2005
Publisher	Delacorte Press
Physical Description	print ix, 979 p. ; 24 cm.
Format	text
Abstract	
Subjects	Time travel -- Fiction.
Online Resources	Contributor biographical information Publisher description Sample text

4.5 Perform Holdings Maintenance

4.5.1 Use the Item Status and Holdings Maintenance Screens

To access the **Holdings Maintenance** screen, find a record in the catalog, click Actions for this Record → **Holdings Maintenance**.

The **Holdings Maintenance** screen and the **Item Status** screen allow you to perform the same actions.   In the **Holdings Maintenance** screen, the tab, **Actions for this Record,** corresponds to the tab, **Actions for Selected Items** in the **Item Status** screen. In the **Holdings Maintenance** screen, the tab **Actions for Selected Rows** corresponds to the tab, **Actions for Catalogers**, in the **Item Status** screen.

You can upload multiple barcodes into the **Item Status** screen in batch using the **Upload from File** button. However, these barcodes must be in CSV format.

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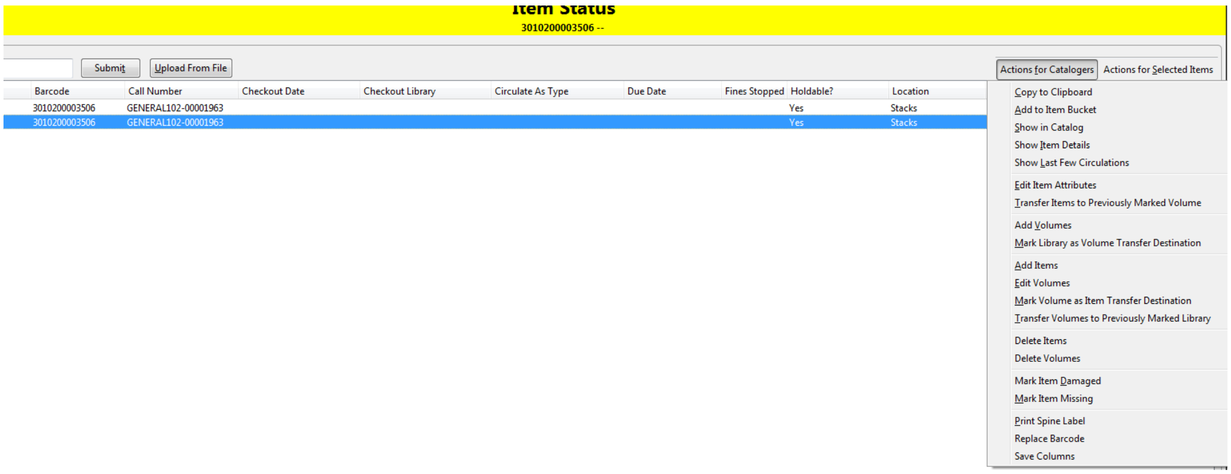
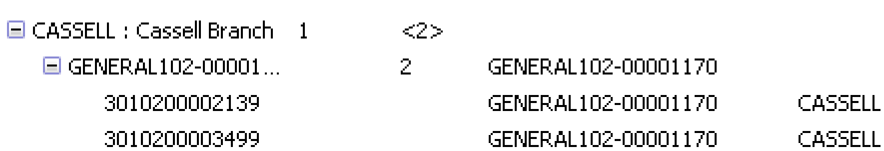


The **Holdings Maintenance** screen, however, also allows you to view copies at other libraries within a system or consortium. Click plus signs to look at volumes and copies at a specific branch. If you would like to view all volumes or items at all locations, then check the boxes adjacent to **Show Volumes** and **Show Items**, or click **Show Libraries with Items**. You can also click the drop down box, to highlight libraries with volumes in green.

The volumes and items beneath each branch will appear.



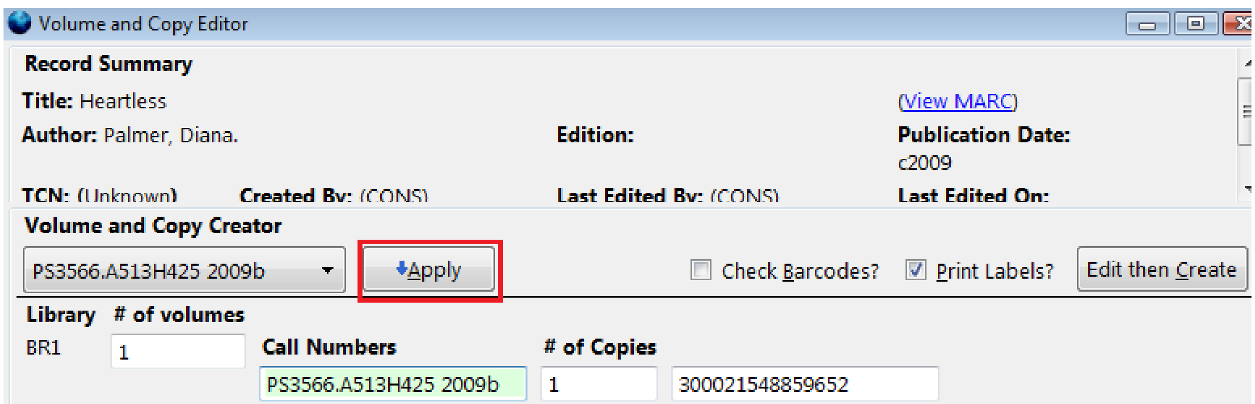
4.5.2 Add Volumes and Items

1. To add volumes, click **Cataloging → Display Item** or click the **Item Status** button on the **Toggle Button Bar**.

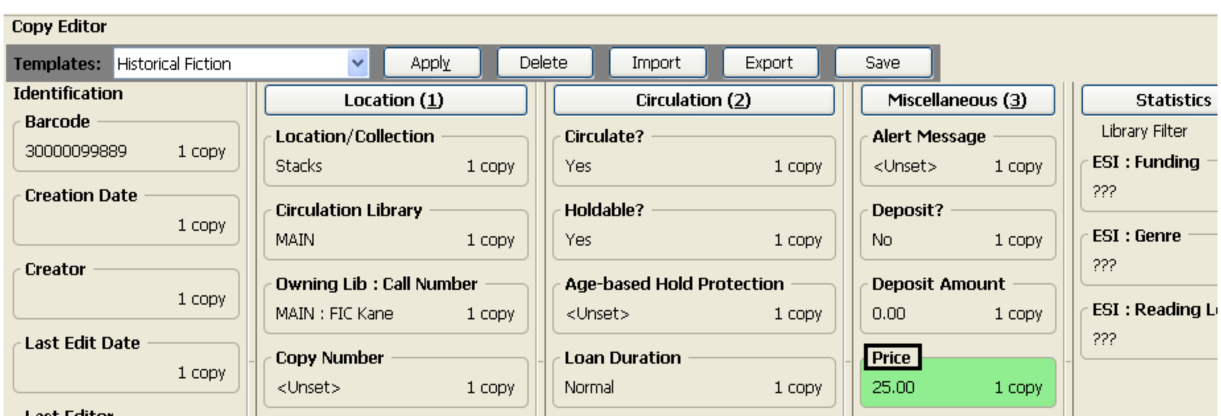
2. Enter the barcode and click **Actions for Catalogers → Add Volumes.** The **Volume and Copy Creator** opens.

3. Enter the number of volumes, the call number, the number of copies, and the barcode(s). The call numbers from the MARC record are listed in the drop-down box. You may apply one of those, or you may enter a new one. The **Check Barcodes?** box checks your barcode against the codabar standard.

4. To create volumes and copies, click **Edit then Create**.



6. The **Copy Editor** enables you to edit the item's attributes. Any changes that you make will appear in green. After you have finished making changes, click **Create Copies** in the bottom right corner. The **Copy Editor** is discussed in more detail in 3.4.1.



6. The changes will appear in the staff client.

To add only an item from the **Item Status** screen, click **Actions for Catalogers → Add Items**. The **Volume and Copy Editor** will open, and the volume information will already be filled in the boxes. You will need to add the copies and then make changes in the **Copy Editor**.

4.5.3 Edit Volumes and Items

1. To edit volumes, click **Actions for Catalogers → Edit Volumes**. The **Volume Editor**, which allows you to modify an item's call number, opens. Make the changes, and click **Modify**.

2. To edit items, click **Actions for Catalogers → Edit Item Attributes**. The **Copy Editor** opens. Make the changes, and click **Modify Copies**.

4.5.4 Mark Item Damaged

To mark an item damaged, click **Item Status →Actions for Catalogers → Mark Item Damaged**. You can also mark an item damaged by clicking **Circulation → Check Items In → Actions for Selected Items → Mark Item Damaged**. You can also perform this function through the patron's account in the **Items Out** screen.

4.5.5 Mark Item Missing

To mark an item missing, click **Item Status → Actions for Catalogers → Mark Item Missing**. You can also perform this function through the patron's account in the **Items Out** screen.

4.5.6 Print Spine Labels

To print spine labels, click Item Status → Print Spine Labels. You can also print spine labels form the **Volume and Copy Editor**.

4.5.7 Replace Barcodes

To replace an old barcode with a new one in the **Item Status** screen, enter the barcode and click **Replace Barcode**. You can also replace a barcode by going opening the Cataloging menu and clicking **Replace Barcode**.

4.5.8 View Item Details

To find information about the recent holds, transits or circulations on an item, open the **Item Status** screen, and scan in an item. Then, highlight the item and click **Actions for Catalogers → Show Item Details**.

4.5.9 View Last Circulations

To view the last circulations on an item, click **Item Status → Actions for Catalogers → Show Last Few Circulations**

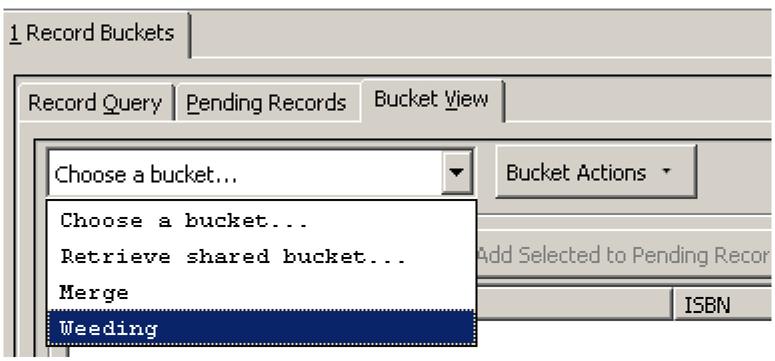
4.6 Manage Buckets

4.6.1 Manage Record Buckets

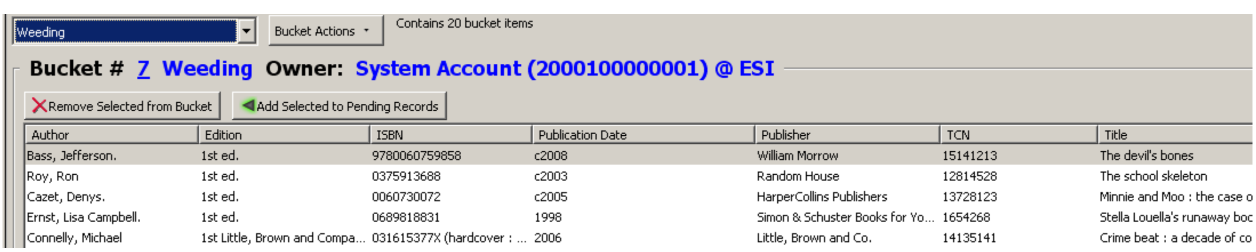
Buckets allow you to store items that you will need at a later time or that you will need to work with as a group. In this example, we will weed four of James Patterson's novels. We will search for these items and put them in a weeding bucket.

1. Select **Cataloging → Manage Record Buckets**

2. The **Record Buckets** screen will appear, and the **Bucket View** tab will be open. If you want to create a new bucket or delete a bucket, you can click **Bucket Actions**. In this example, we will choose the Weeding bucket from the drop down menu.



3. The **Weeding Bucket** will open. Items that are currently in the bucket for weeding will appear. The bucket number appears next to the bucket.



4. Click the **Record Query** tab. Enter a keyword in the query box. This box will perform a keyword search across items in the catalog.

5. Then click, **Submit**.

6. The ILS will retrieve the record(s). Highlight the item(s) that you want to put in a bucket.

Patterson, James					AUTOGENERATED-4	I, Alex Cross
Patterson, James	1st ed.	9780316002929 (hc)	2008	Little, Brown	15100926	The dangerous days of Daniel X
Patterson, James	1st ed.	9780316018746	2009	Little, Brown and Co.	15388665	Run for your life a novel
Patterson, James	1st ed.	9780316018708	2008	Little, Brown	15167258	Sail : a novel
Patterson, James	1st ed.	9780316002899	2009	Little, Brown and Co.	15472007	Max : a Maximum Ride novel
Patterson, James	1st ed.	0316000612	c2004	Little, Brown	13456555	SantaKid
Patterson, James	1st ed.	0316018724	2008	Little, Brown	15343652	Cross country a novel

7. Then click **Add Selected to Pending Records** at the bottom right corner of the screen.

8. Open the **Pending Records** tab. The items that you added will appear.

Pending Records

Author	Edition	ISBN	Publication Date	Publisher	TCN	Title
Patterson, James	1st ed.	9780316002899	2009	Little, Brown and Co.	15472007	Max : a Maximum Ride novel
Patterson, James	1st ed.	9780316018708	2008	Little, Brown	15167258	Sail : a novel
Patterson, James	1st ed.	9780316018746	2009	Little, Brown and Co.	15388665	Run for your life a novel
Patterson, James	1st ed.	9780316002929 (hc)	2008	Little, Brown	15100926	The dangerous days of Daniel X

7. Select **Add All to Current Bucket** at the bottom right corner of the screen.

8. Click the **Bucket View** tab. The items will appear at the top of the screen. You can use the buttons at the bottom right of the screen to further process the items, or you can return to the bucket at a later time. These buttons allow you to show the records in the catalog, delete all records, merge all records, and export all records.

Bucket # 7 Weeding Owner: System Account (2000100000001) @ ESI

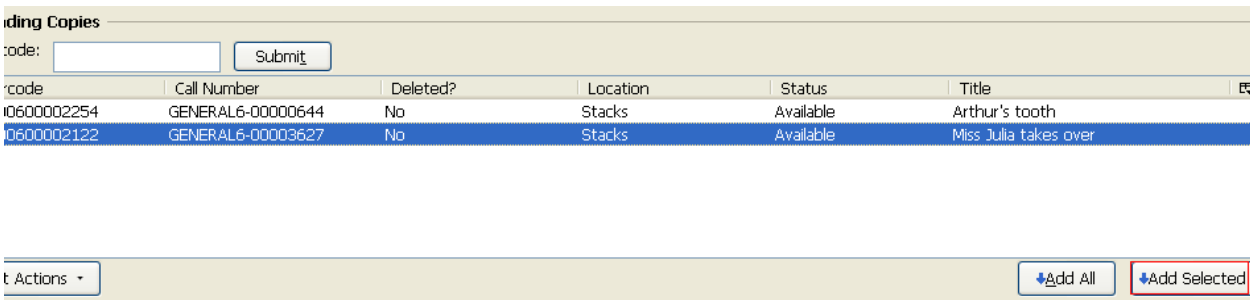
Remove Selected from Bucket | Add Selected to Pending Records

Author	Edition	ISBN	Publication Date	Publisher	TCN	Title
Patterson, James	1st ed.	9780316002899	2009	Little, Brown and Co.	15472007	Max : a Maximum Ride novel
Patterson, James	1st ed.	9780316018708	2008	Little, Brown	15167258	Sail : a novel
Patterson, James	1st ed.	9780316018746	2009	Little, Brown and Co.	15388665	Run for your life a novel
Patterson, James	1st ed.	9780316002929 (hc)	2008	Little, Brown	15100926	The dangerous days of Daniel X

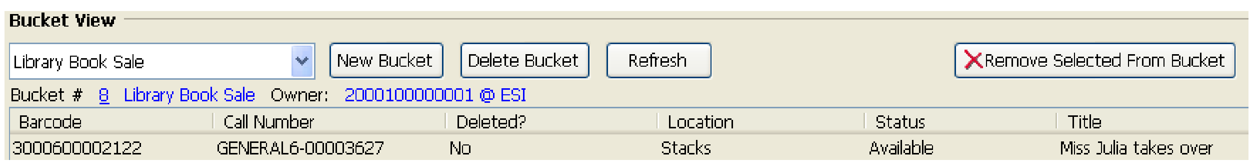
4.6.2 Manage Copy Buckets

1. Choose a bucket or create a **New Bucket** in the **Bucket View** in the bottom half of the screen.

2. Scan an item barcode into the **Pending Copies** portion of the screen. Highlight the item(s) that you want to add to a bucket, and click **Add Selected**, or **Add All**.



3. The item appears in the bucket. You can use the buttons in the bottom right corner of the screen to further process the items. You can show the item's status, transfer items in batch to another volume, edit an item's attributes, or delete items from the catalog.



Chapter 5: Administrative Functions and the Cataloging Module

5.1 Local Administration

Local Administration functions enables administrators to set policies and procedures at the local level. You must have administrative permissions to view these screens.

5.1.1 Copy Locations Editor

The **Copy Locations Editor** enables you to create shelving locations for items. You may specify if the attributes of items in this location, e.g. if these items holdable or OPAC visible. Based on permissions, you may view items in your location or at other branches or systems within your consortium. The locations that are set in the **Copy Locations Editor** appear as potential shelving locations in the **Copy Editor**.

5.1.2 Non-Cataloged Types Editor

The **Non-Cataloged Types Editor** enables you to create items that you do not want to catalog but that you will lend to patrons. You can specify if you want the items to circulate or stay in house.

5.1.3 Statistical Categories Editor

The **Statistical Categories Editor** allows you to keep statistics on items. You can create statistical categories such as reading level or funding. You can enter information in these statistical categories in the **Copy Editor**.

5.1.4 Library Settings Editor

The Library Settings Editor is comprised of many setting that impact various modules within the ILS. The following settings work together and pertain to the cataloging module.

5.1.4.1 Alert on Empty Bib Records

This setting will alert you to an empty bib record if you try to delete it.

5.1.4.2 Do Not Automatically Delete Empty Bib Records

This setting enables you to choose to automatically delete empty bib records. If this setting is set to False, and the alert of empty bib records is set to False, then you will receive no warning before you delete an empty bib record.

5.2 Server Administration

5.2.1 Permission Groups

Permission Groups enables you to assign groups of permissions to groups of staff members. To access the default permissions for the catalogers' permission group, click **Admin → Server Administration → Permission Groups → Catalogers.**

To add a new permission

1. Click **New Mapping**.

2. Select the permission from the drop down box.
3. Add the depth of the permission.
4. Check the box if the permission is grantable, that is, can the staff member can grant the permission to another staff member?

5.2.2 Permissions

Click this link to view a list of all possible permissions.

5.2.3 Copy Statuses

This setting enables you to create copy statuses. These can be made holdable and OPAC visible.

5.2.4 MARC Codes

The MARC Codes are defined in this portion of the Admin module.

5.2.5 Z39.50 Servers

This screen enables you configure the Z39.50 servers.

5.2.6 Circulation Modifiers

Circulation modifiers enable you to create and define item types. These choices appear in the **Copy Editor**.