Editing a Bibliographic Record, and Creating Holdings and Item Records in Aleph

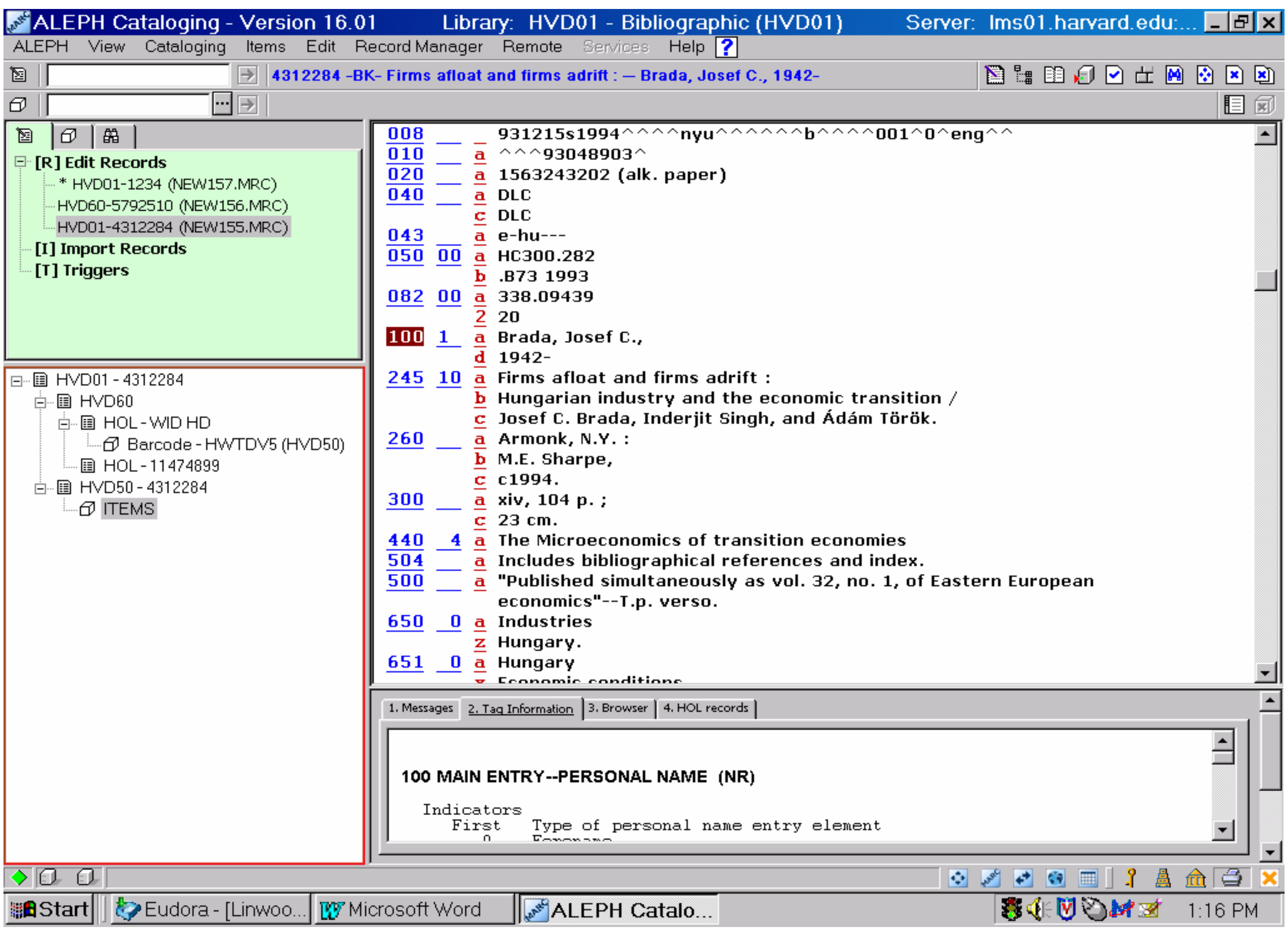
2 August 2004

This document provides a basic overview of features and functionality associated with the Aleph Cataloging Module and steps through a sample cataloging procedure. It assumes that the appropriate bibliographic record has been found and “pushed” into the record-editing mode of the Cataloging Module. It provides an example of a bibliographic record, a holdings record and an item record in Aleph. It shows how to change screen size, to add and delete fields, and check the authority file for uniform titles and serial titles. It shows how to create and/or edit both holdings and items records. *Edit the bibliographic record according to task-specific guidelines.*

The Bibliographic Record

General Overview

The Edit Record Screen of the Catalog Module is where a new record can be created, where the accuracy of information in an existing record can be verified, and where an existing record can be edited.



In the upper left pane under **Edit Records** is a list of records you have opened on your screen. Numbers preceded by **HVD01** are bibliographic records. Numbers preceded by **HVD60** are holdings records. Records are retrievable by clicking on and highlighting their record number. The record corresponding to the highlighted number will be displayed in the editing pane, upper right. An ***asterisk** in front of a record number indicates that changes have been made to the record and that those changes have **not** been saved on the server. *All edited records must be saved to the server, or the edits will be lost.*

The lower left pane, called the **Record Manager**, provides information about holdings and items attached to the record. **From this pane, the bibliographic record, or holdings record, is "pushed" into the items module.**

The bottom right pane serves several functions:
- Tab 2 provides MARC coding information for whatever MARC tag is highlighted in the active bibliographic record.
- Tab 4 is where you create a new holdings record or **push** an existing holdings record into the Edit pane**.**

Enlarging and splitting the bibliographic record window

The editing pane, upper right, can be enlarged twice. Use any of the following methods to toggle between the 3 different window sizes:
- Use the keyboard combo **Ctrl +J**
- Click on the **Full screen** icon on the toolbar, upper right, second row
- Under the **View** menu, select **Full screen**.

The editing pane can be split in two so that two records can be viewed side by side. Use one of these two methods to toggle between full screen or split screen mode:
- **Split editor mode icon,** upper right, looks like an open book
- **Ctrl + B**

Editing fixed fields LDR and 008

Editing of the LDR and 008 fields is done via a form which is accessed by placing the cursor on the field, and using **Ctrl+F.**

Verifying fields: 240, 4XX, 8XX

To check a uniform title (240) or serials title (4XX or 8XX) against its authorized form in the authority database:
- Highlight the field number
- Use **Ctrl + F3** (the function key)
- You will have the option of searching the resource files (HVD02 and HVD03) or the LC Authority file (HVD10)
- Choose **HVD10**.

If you wish to check a field against the form used in Harvard's bibliographic database (HVD01)

- Highlight the field you wish to check
- Use the function key **F3**

Adding and deleting fields

To add a field to a bib or holdings record:

- Place cursor on tag above where you wish to insert a new field.
- Use F6, and type in tag number, indicators, subfield code, and information

To add a subfield to a line:

- Place cursor on subfield above where you wish to insert the next subfield
- Use F7, and type in subfield code and value or,

- Place cursor after information in the previous subfield line
- Type $$ and subfield code [$$b,c,etc], then the value.

i.e. 300 _ a 356 p. ;$$c 21 cm.

To delete a field or subfield:

- Place cursor on field or subfield you wish to delete
- Use Ctrl + F5 to delete a field
- Use Ctrl + F7 to delete a subfield

If you press <enter> when a field or subfield is blank, the field or subfield will disappear from the record.

*****To recapture fields or subfields you mistakenly deleted*****
Use Ctrl + Z

Saving the record to the server

After making changes to a record, you ***must*** save these changes to the server. Otherwise the changes are lost.

- Click on the **save to server icon, or**
- Use the macro **Win + F12**

The Holdings Record

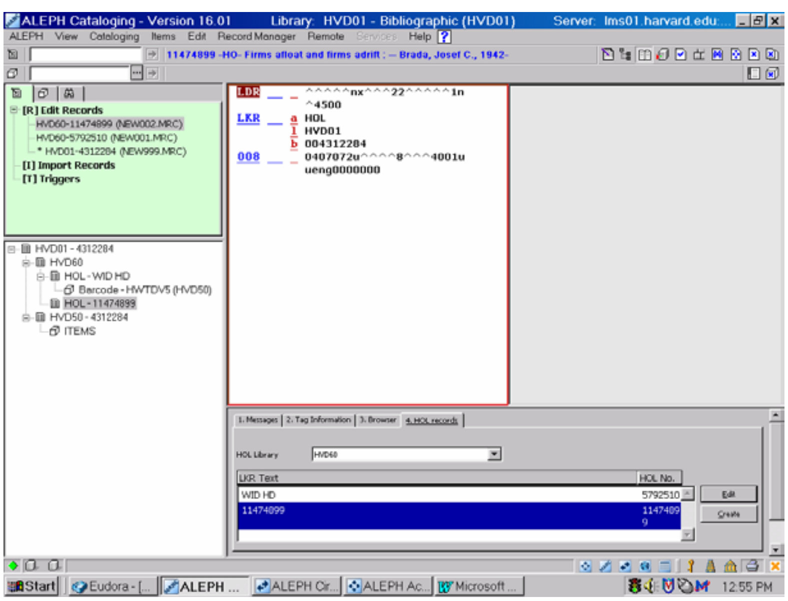
1. After you have edited the bibliographic record and saved it to the server, invoke **the split screen editor.** Splitting the screen allows you to place the bibliographic and holdings records side by side. The bibliographic and holdings records *must* be side by side when using the holdings macro.
   - Use **Ctrl + B ,**or
   - Click on **Split editor mode icon,** or
   - Click **Cataloging/Split editor mode**

2. To view, edit or create a holdings record:
   - Use **Ctrl + O, or**
   - Click **Tab 4** in the bottom pane. **(**HOL records tab)

3. If the holdings record box is empty,
   - Click on **Create.** A new holdings record number will appear in the holdings list. It will be highlighted;
   - Click on **Edit** and the holdings record will open up in the Edit pane.

4. Older records for books in the backlog have been converted to Aleph from Harvard's previous online system. These records will already have a preliminary holdings record attached to the bibliographic record. In these cases, when you open the holdings record (**Ctrl + O,** or click **Tab 4**) there will be a number in the Hol Records box, and, in most cases, no holdings location.

5. If a provisional holdings record is attached to the bibliographic record,
   - **Highlight** the number, and
   - Click **Edit.**



6. The holdings record will open up over the bibliographic record.

7. Move these two records side by side:

- use the macro **Win W,** or,
- bring the blank pane on the right in focus by clicking in it, then click on Bib record number in the Edit Records pane.

8. Update the holdings record with the **Win H** macro.

9. Follow the prompts regarding collection code.

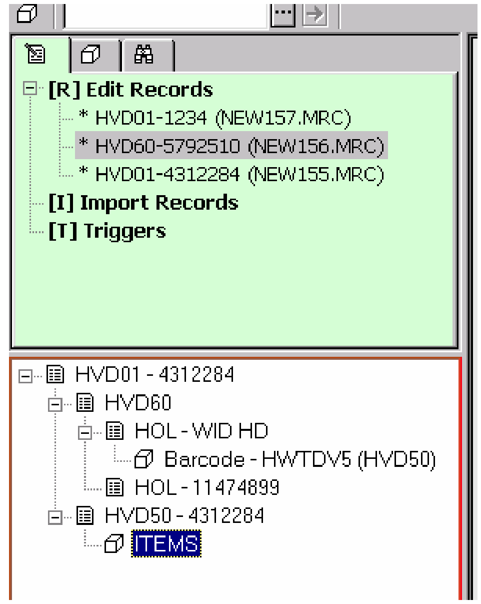
10. When prompted to add the call number from the bib record, click **Yes.**

Once the macro has **fully** run, **Save** the record to the server.
Use the macro **Win F12**, or
Click **Save on Server icon** on your toolbar.

THE COMPLETED HOLDINGS RECORD will have a
LDR, OWN, LKR, 008, 852, H08, and XPR field. (The 005 and the grayed-out fields are system supplied and cannot be altered by the cataloger.) After the record is saved to the server, the subfield b in the H08 field will be converted to the current day's date**.**

LDR			00320nx^^^22001331n^4 500
OWN		a	WID
LKR		a	HOL
		l	HVD01
		b	004312284
001			005792510
005			20040707131015.0
008			9405192p^^^^8^^^100 1uu^^^0941024
852	0	b	WID
		c	HD
		h	HC300.282
		i	.B73 1994
H08		a	c
		b	t
XPR		a	OCLC
		b	20040713
H01	6	a	AVV7015
		b	001
		x	01
H03		a	MHAVV70156HU

The Item Record



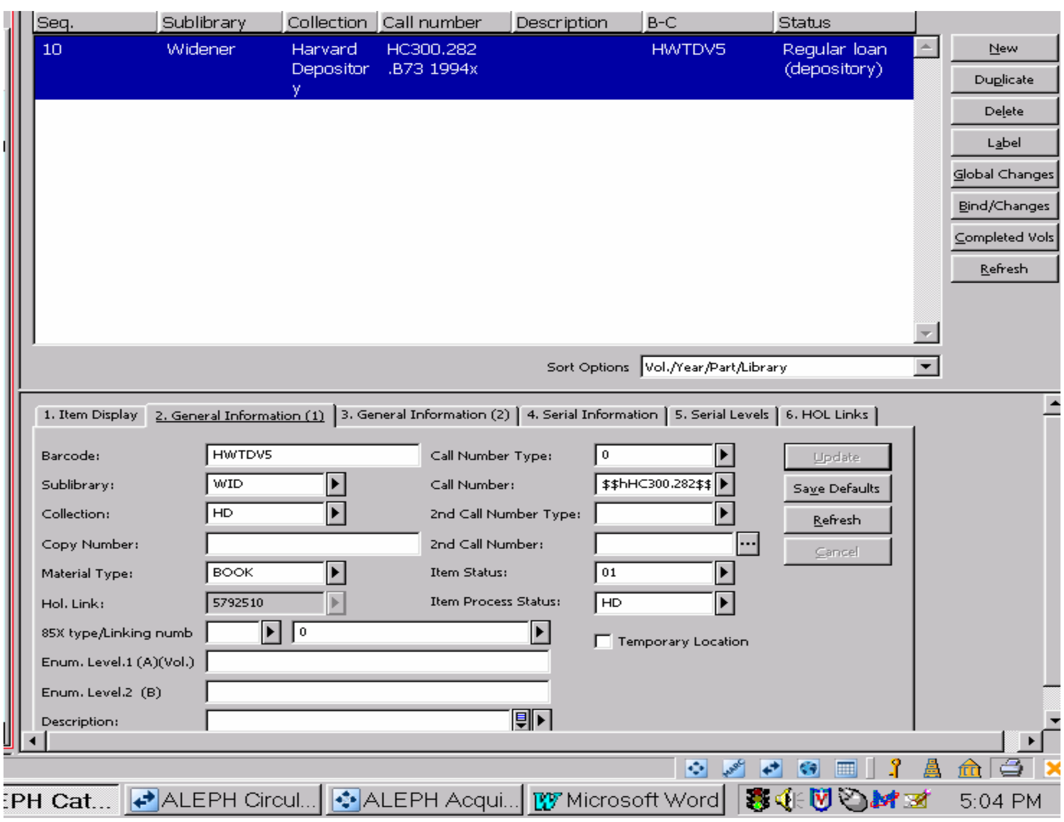
1. Opening the items record: **double click on the word "Items"** in the lower left Record Manager pane.

2. Some records will already have a preliminary item record with a system-supplied barcode. Others will have no item record.

3. If a preliminary item record exists for your book, it will appear highlighted in the upper right pane when you move to the Item Module.

Check the item form in the lower right pane to be sure that it is not an item record for a different copy of the book A preliminary record will have a system-supplied barcode, which is a series of numbers shorter than the one on a stacks book.

- *A stacks barcode is 14 digits long and will begin with the digits 32044.*
- *An HD barcode is alpha-numeric.*



4. If there is a preliminary item record for your book,
   - Make sure the item record is **linked** to the proper holdings record. If in doubt, click on Tab 6 (*HOL Links)* of the item form to check linkage.
   - Place a barcode on the book according to instructions.
   - On Tab 2 *(General Information 1*) replace the system-supplied barcode in the item record by highlighting it and pressing the **delete** button, or simply by scanning in the permanent barcode.
   - Verify that the item record received the barcode correctly. Books may be lost at HD if the barcode is not correctly entered into the record.
   - Replace the 'item process status' **RE** with **HD**, and
   - On Tab 3 (*General Information 2)* in 'Remote Storage ID' type **HDEP**
   - **Update**

5. If there is no preliminary item record, the upper right pane will be empty and grayed out except for the **"New**" button, upper right.
   - Click the **New** button to open a new item record.
   - **Link** the item record to the holdings record! Click on the arrow next to the hol. link box to open the drop-down menu. Double-click on the appropriate selection.
   - Place a barcode to the book according to instructions.
   - Scan that barcode into the Barcode Field. Verify that the item record received the barcode correctly.
   - Click on **Refresh** button. Call number, sublibrary and collection information will populate those fields.
   - **Update**

6. **SETTING DEFAULTS**: If all of your books are going to one location (i.e. the Harvard Depository) you may want to set defaults in the Item Form.

   Default setting should fill in the following fields for you on **Tab 2**:
   - *Sublibrary* (WID),
   - *Collection* (HD),
   - *Material Type* (BOOK),
   - *Item Status* (01),
   - *Item Process Status* (HD);

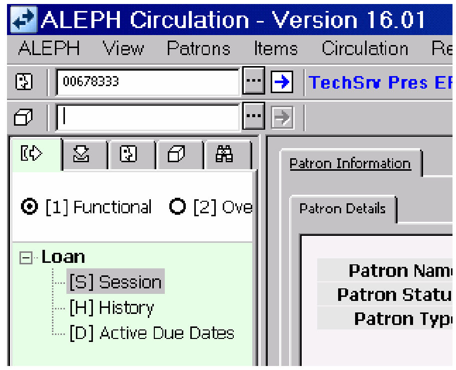
   And on **Tab 3**:
   - *Remote Storage ID* (HDEP).

Circulation

1. Open the Circulation module by clicking on the icon at the bottom of the item module screen.

2. Hardbound books going to HD:

    - Click the first tab which is the **Loan** Tab
    - In the uppermost box on the toolbar, scan in the Pseudo-Patron barcode [Monographs-Shelf Preparation]
    - <**Enter**>
    - In the lower box, scan in the barcode which is on the book
    - **<Enter>**



3. Paperbacks going to HD are treated differently:

    - Choose the second tab, the **Return** Tab
    - Scan in the barcode on the book
    - **<Enter>**
    - Prompt tells you "Item must be returned to the Harvard Depository"
    - Click **OK**, or <**Enter>**