Cataloging with Evergreen For PINES Libraries

Version 1.4.0.7

TABLE OF CONTENTS

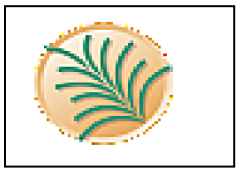
Chapter 1 Setting up and starting Evergreen

1.1 Installing and Running the Evergreen Staff Client

In general, the local system administrator for each library system will make sure that the correct version is loaded onto staff computers. Also, the local administrator should assign the label or name as required by the staff client for each workstation before a full connection to the Evergreen server can occur. The staff client is available on the PINES website at http://pines.georgialibraries.org/pines/upgrading-evergreen-staff-client.

1.2 Logging into the Evergreen Staff Client

Click on the Evergreen logo for the staff client, located on your desktop:



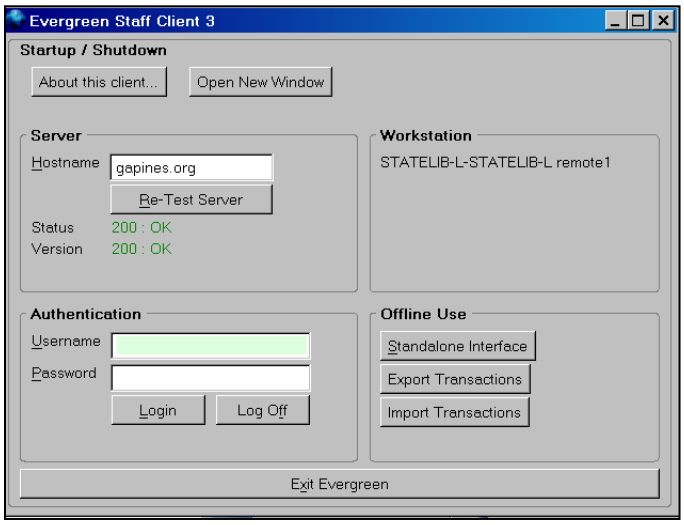
Evergreen Staff Client

Or your start menu:

Or you can use the small icon near the start button on your taskbar:

Where the icons are located on your computer are dependent on your operating system version and may not be included here.

The startup/shutdown dialog box will open. Sign in using the username and password provided for you:



The information portal will open in a new window. The startup/shutdown window (labeled Evergreen Staff Client) will minimize, but not close. Closing this window will log you out of the staff client. While logged into Evergreen staff client, you will have at least two windows open. You can open a new window from either the startup/shutdown window or from within the file menu. Your working windows will be labeled with your log-in name.

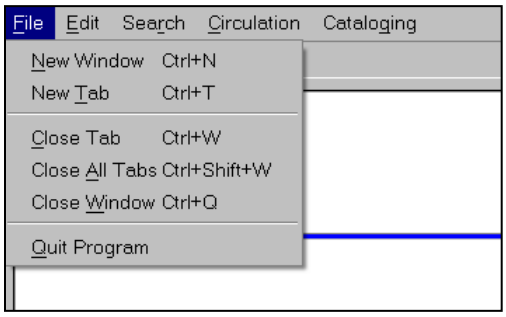
1.3 Navigating the Evergreen Staff Client

You can navigate around the Evergreen client using the mouse in conjunction with several menus located around the screen or with keyboard commands. For convenience, access to functionality is repeated in several menus.

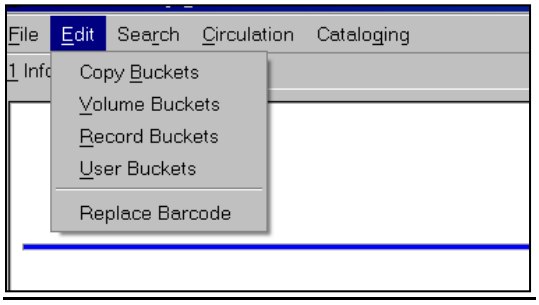
1.3.1 The Menu Bar

The menu bar is located immediately under the title bar. The menus accessible through this bar are: file, edit, search, circulation and cataloging. Each menu also contains the keyboard commands for each function:

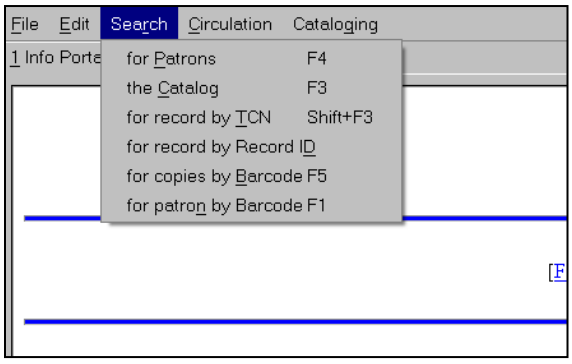
The file menu contains the most basic navigation tools: opening and closing tabs and windows and exiting the program:



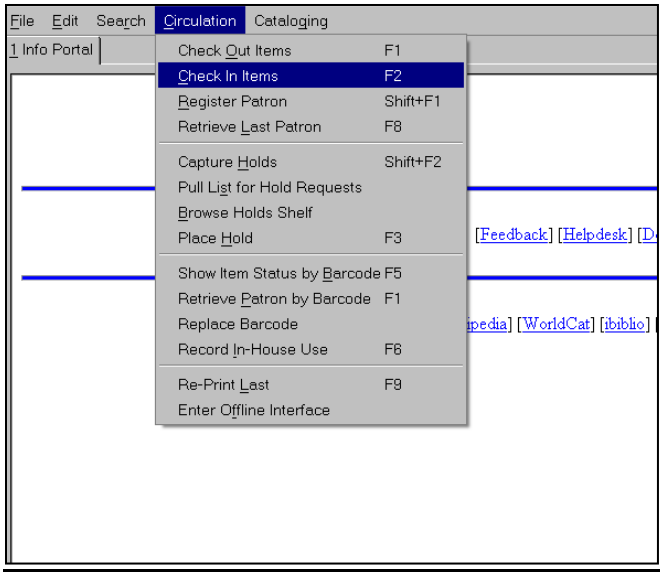
Through the edit menu, you access functions for replacing barcodes, batch editing records, moving volumes or items among bibliographic records or merging records. (As of Release 1.4.0.7, Volume and User Buckets are still in development):



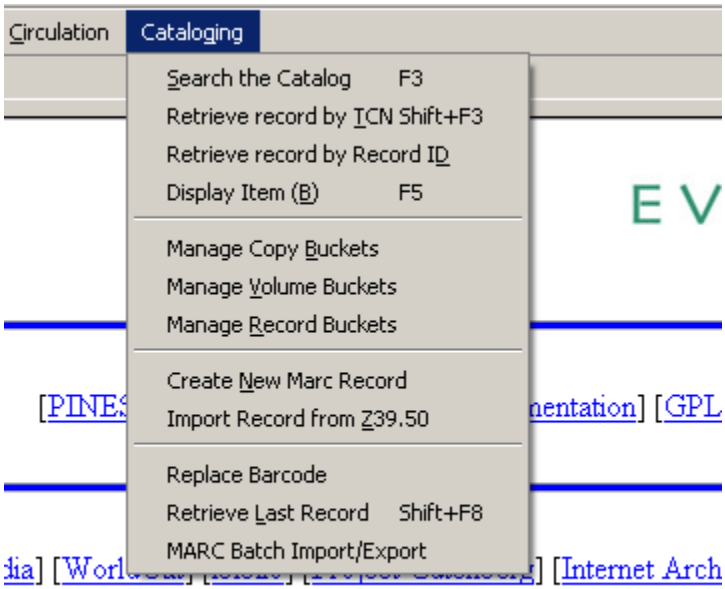
The search menu allows for quick access to search screens for bibliographic records and patrons:



The circulation menu contains functions standard to circulation:



The menu cataloging users are most likely to use is, of course, cataloging (As of Release 1.4.0.7, Volume Buckets is still under development):



1.3.2 Keyboard shortcuts

Keyboard short cuts are available to navigate Evergreen as options to mousing and as replacements for some standard MSWindows menus available in other programs by clicking the right mouse button.

1.3.2.1 Basic keyboard navigation short cuts

Switch Tabs: **CTRL Tab**

New windows: **CTRL N**
New Tabs: **CTRL T**
Close Tabs: **CTRL W**
Close all Tabs: **CTRL SHIFT+W**

1.3.2.2 Function keys for cataloging

Search the catalog: **F3**
Retrieve record by TCN: **SHIFT F3**
Display item (or Show item status by barcode): **F5**
Retrieve last record: **SHIFT F8**

1.3.2.3 Cataloging menu: ALT G

Search the catalog: **F3**
Retrieve record by TCN: **ALT T**
Retrieve record by Record ID: **ALT D**
Display Item: **ALT B**
Manage Copy Buckets: **ALT B** twice
Manage Volume Buckets: **ALT V** (in development)
Manage Record Buckets: **ALT R**
Create New MARC Record: **ALT N**
Import Record from Z39.50: **ALT Z**
Retrieve Last Record: **SHIFT F8**

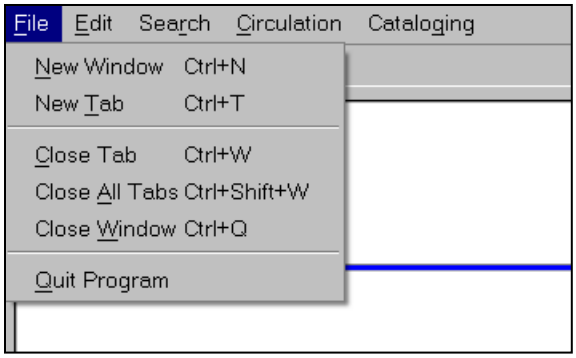
1.3.2.4 Word processing functions

Evergreen reserves most menus accessed through right-clicking the mouse for software-specific values. Keyboard shortcuts are used in many places in Evergreen for standard word processing functions:

Copy: **CTRL C**
Cut: **CTRL X**
Paste: **CTRL V**
Undo: **CTRL Z**
Bold: **CTRL B**
Underline: **CTRL U**
Italic: **CTRL I**

1.3.3 Navigating Through Different Screen Displays

Evergreen uses tabs to display work screens. The default is always the information portal. New tabs can be added or existing tabs closed using the file menu or the associated keyboard shortcuts:

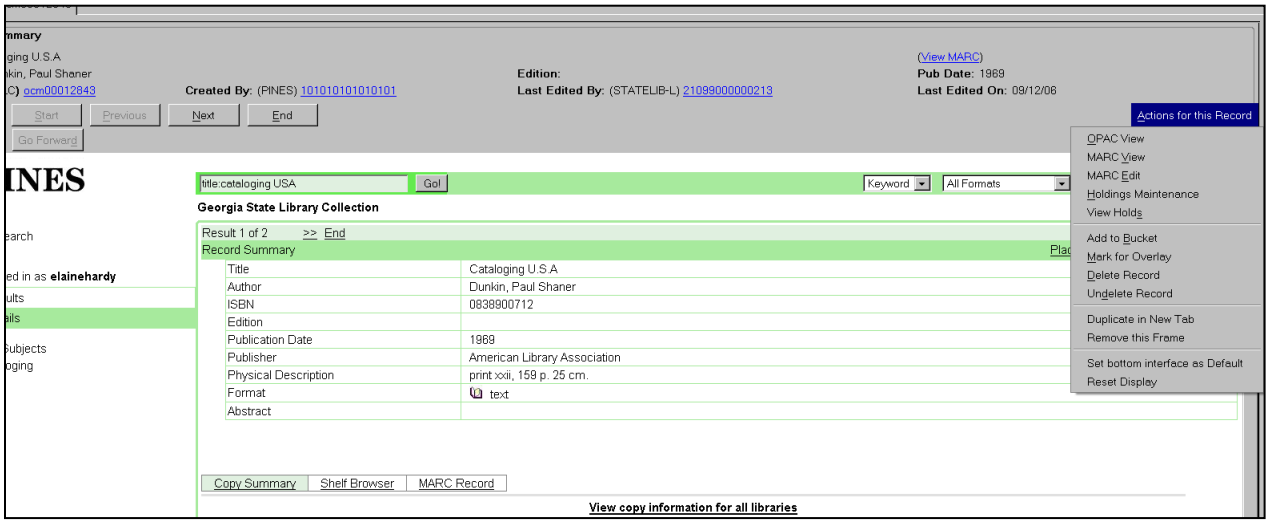


Keyboard shortcuts for opening, closing and moving among tabs are:

Switch Tabs: **CTRL Tab**
New windows: **CTRL N**
New Tabs: **CTRL T**
Close Tabs: **CTRL W**
Close all Tabs: **CTRL + SHIFT W**

You can view a title (bibliographic) record several ways in the staff client: **OPAC View**, **MARC View** and **MARC Edit** view, or you can view the volumes and items attached in **Holdings Maintenance** view. The default view is the **OPAC view**.

To change the screen display from the default view, click on **Action for this Record** and choose your desired display:



To make any view default, click on **Set the Bottom Interface as Default**. This is a one-time action until you reset to a different display. **Note:** if you are using a generic login, you will set the default view for everyone that uses the login.

Keyboard short cuts for the different views are:

Actions for this Record: **ALT A**

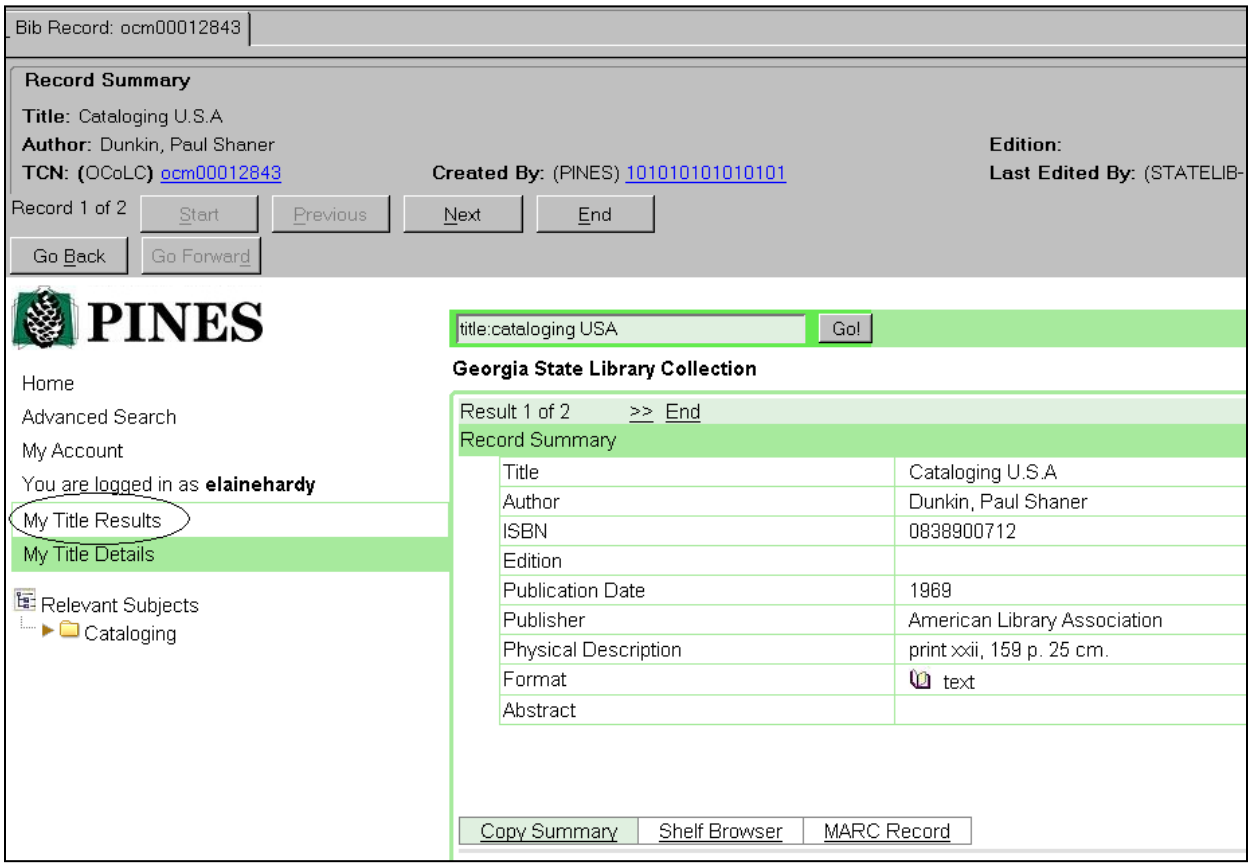
OPAC View: **CTRL O**
MARC View: **CTRL V**

MARC Edit: **CTRL E**
Holdings Maintenance: **CTRL H**

Returning to search results:

From **OPAC View**:

In **Actions for this Record**, choose OPAC View and then **My title results** on left-hand side of screen:

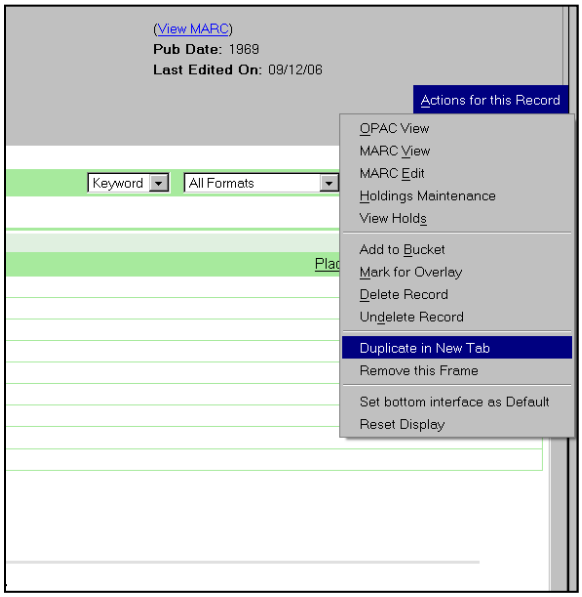


From **MARC Edit**, **MARC View** or **Holdings Maintenance**:

In **Actions for this Record**, choose **OPAC View,** and then choose **My title results** on left-hand side of OPAC screen.

1.3.4 Miscellaneous functions

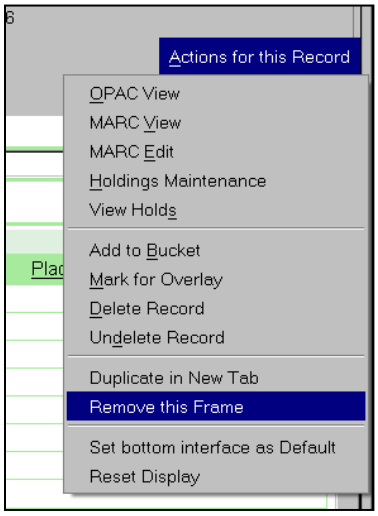
1.3.4.1 Duplicate in New Tab



Duplicate in New Tab (under **Actions for this Record**) allows you to re-create a record display in another tab along with its search result set, so you may compare multiple records from the same search query without having to re-create the search. This function enables comparison of similar title records to determine either the best match or potential duplicates for merging.

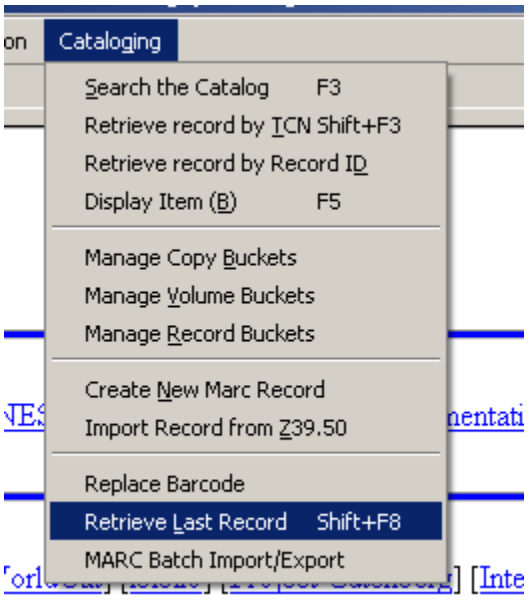
1.3.4.2 Remove this frame

The **Remove this Frame** command:



Removes the **Record Summary** from the display:

Using the **Retrieve Last Record** option or executing a new search will return the frame.

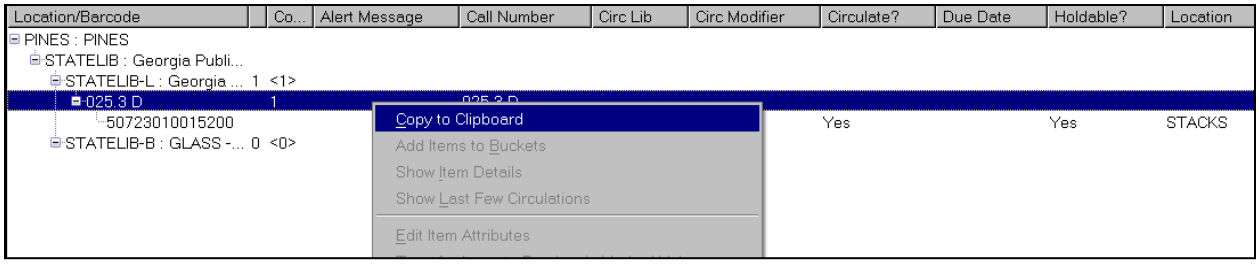


1.3.4.3 Copy to clipboard

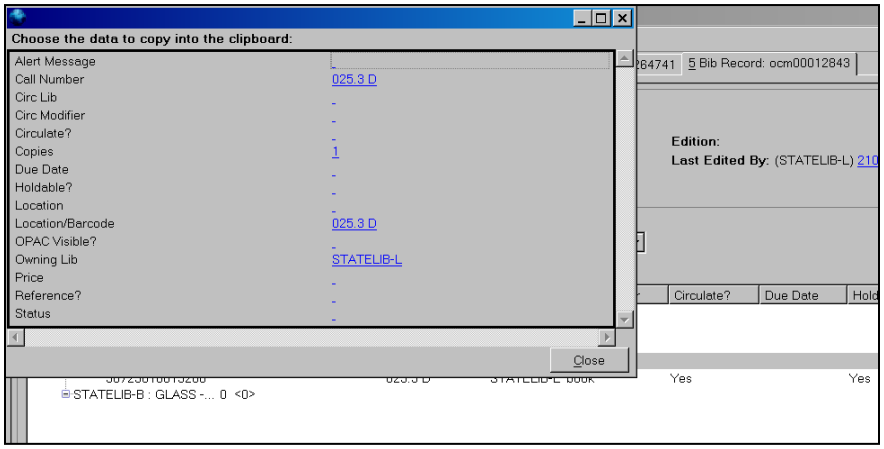
There are several places in Evergreen where you can copy pertinent information to a clipboard to paste in any application. Any information in blue and underlined, with the exception of "view MARC, can be copied by clicking on it (View MARC retrieves the MARC record). In the **Record Summary**, the title control number (TCN) as well as barcodes for catalogers that created and last edited the record can be copied.

Within **Holdings Maintenance**, the **Copy to Clipboard** command on the **Actions for Selected Rows** menu allows you to copy different information depending on what you have highlighted.

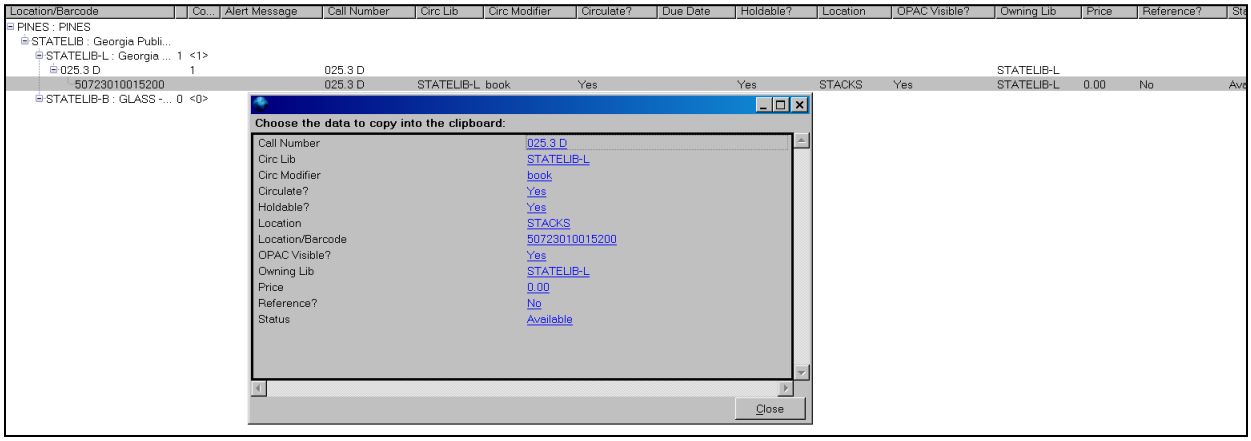
With the volume/call number highlighted, **Copy to Clipboard** (**ALT F. CTLR C**):



Brings up links to copy the call number and the owning library:

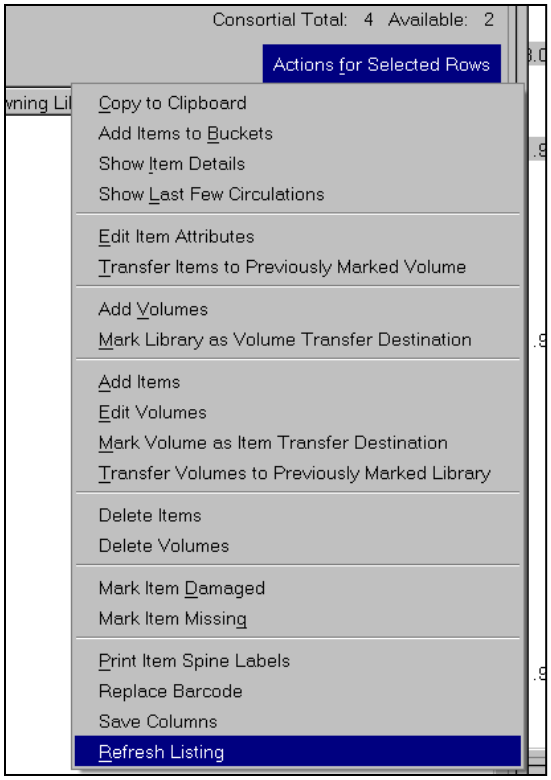


With the individual copy highlighted, you can copy several item attributes, including the barcode, call number, location, owning and circulating libraries in turn:



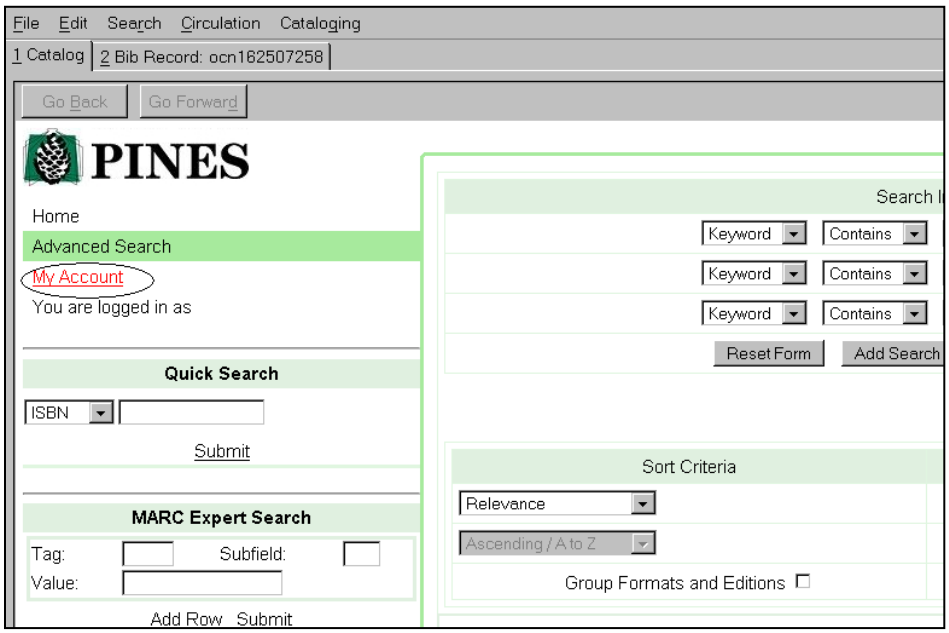
1.3.4.4 Refresh listing

Refresh listing, also under **Actions for Selected Rows**, redisplays the holdings list as a way to see changes made to library holdings or to return to your libraries holdings if you have expanded to see all libraries with items:



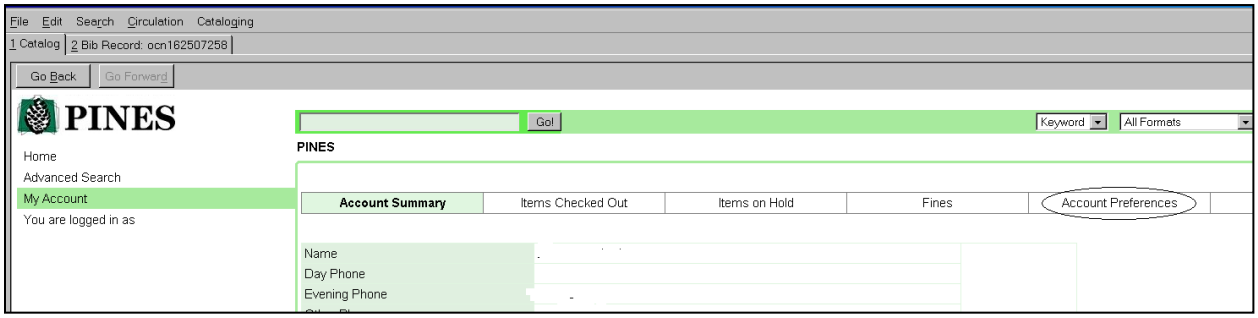
1.4 Personalizing your staff client session

You can personalize your Evergreen sessions by setting defaults for search locations, font size, and the number of hits displayed per page. To set defaults go to the advanced search screen, click on **My Account** on the left-hand side of the screen or:



From the bottom right of the home screen, (click **OK** if there are security messages displayed):

Tthen click on **Account Preferences**:

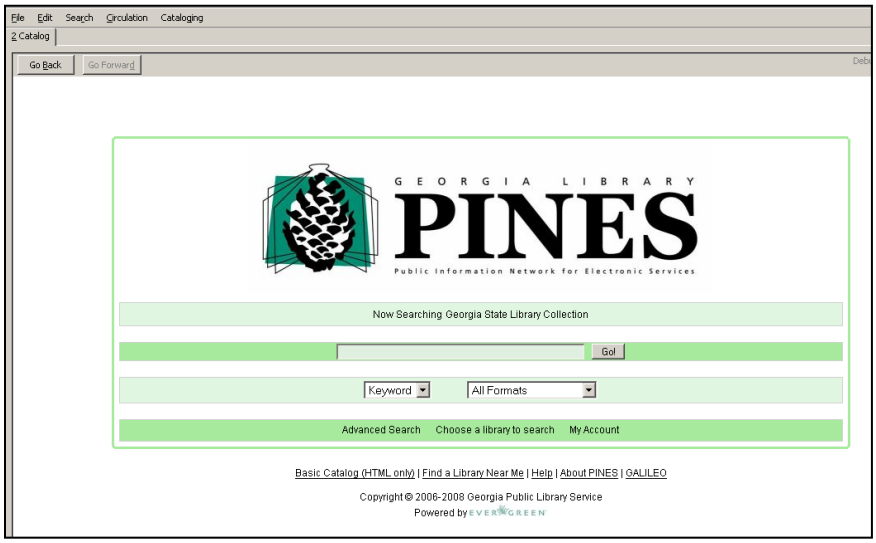


From here, you can set defaults for all subsequent sessions for number of search hits displayed per page, default font size, default search location (your library branch or system, for example), default search range (all PINES, your local system or specific branch)

Chapter 2 Searching with Evergreen

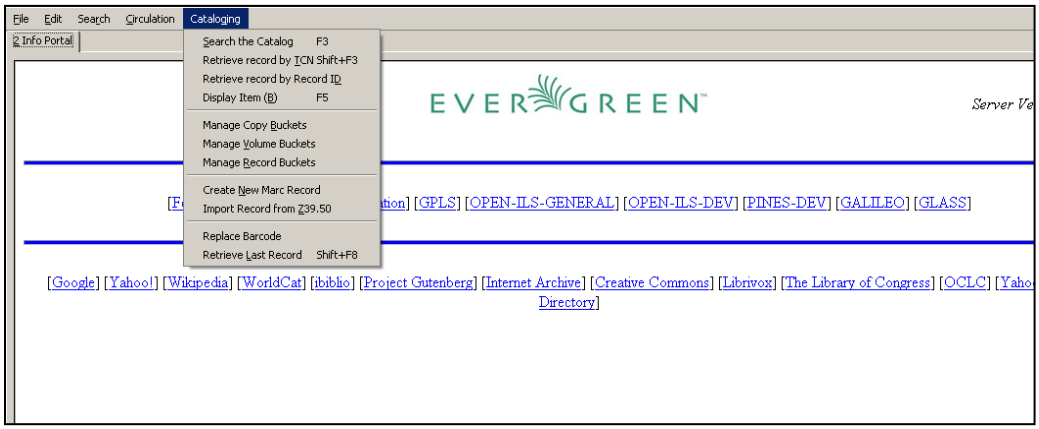
Search screens can be accessed several different ways in Evergreen.

From the home screen:



In the Search menu:

In the Cataloging menu:



Search screens are also accessible through the circulation menu.

2.1 Search keyboard short cuts

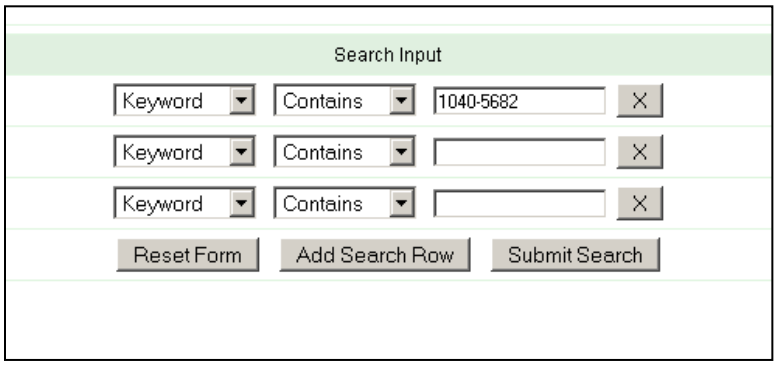
You can also access these screens from the keyboard. The **F3** key brings up the Catalog search screen. The keyboard shortcut **ALT R** then **CTRL C** accesses the search screen through the search drop-down menu or **ALT G** then **CTRL S** to access it through the cataloging drop-down menu.

2.2 Setting search defaults

If you have not already done so, you can personalize your Evergreen sessions by setting defaults for search locations, font size, and the number of hits displayed per page. Follow the instructions in section 1.4 to set search defaults for your staff client sessions.

2.3 Clear Previous Search Queries

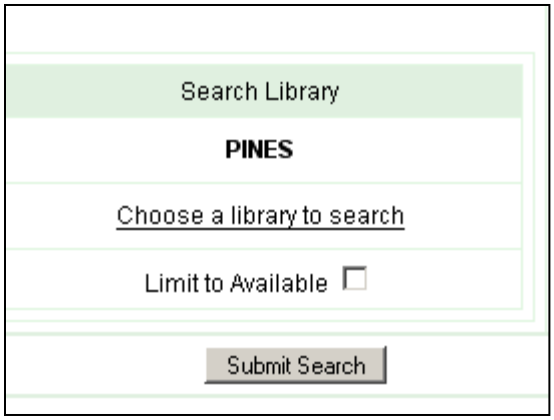
Evergreen retains previous search queries in some of the search boxes. **Reset Form** clears the boxes.



2.4 Advanced Search

Many different types of searches can be created from the advanced search screen. The screen is divided into three areas –**Quick Search**, **MARC Expert Search**, and the main search screen.

The default is set to search all PINES libraries. You can set your own defaults as described in section 1.4 of this manual. For individual searches, you can change the library to broaden or narrow your results as needed. If you are searching all PINES, under **Search Library**, click on **Choose a Library to Search** to get a list of library systems and branches:



If you have a specific library as a default search, you will see a drop-down menu under search library that allows you to change branches, systems or to search all of PINES:

2.4.1 QUICK SEARCH

Number searches (ISBN, ISSN, LCCN, title control number, barcode number) are often the quickest way to retrieve a bibliographic record. The **Quick Search** area of the search screen is dedicated to these number searches. The only number search that can be filtered by library is the call number browse.

2.4.2 Main search screen (search input)

From the main search area, you can

- Search by
  - Keyword
  - Author
  - Title
  - Subject
  - Series
  - Or combination searches
- Filter by
  - Item form
  - Item type
  - Literary form
  - Language
  - Audience

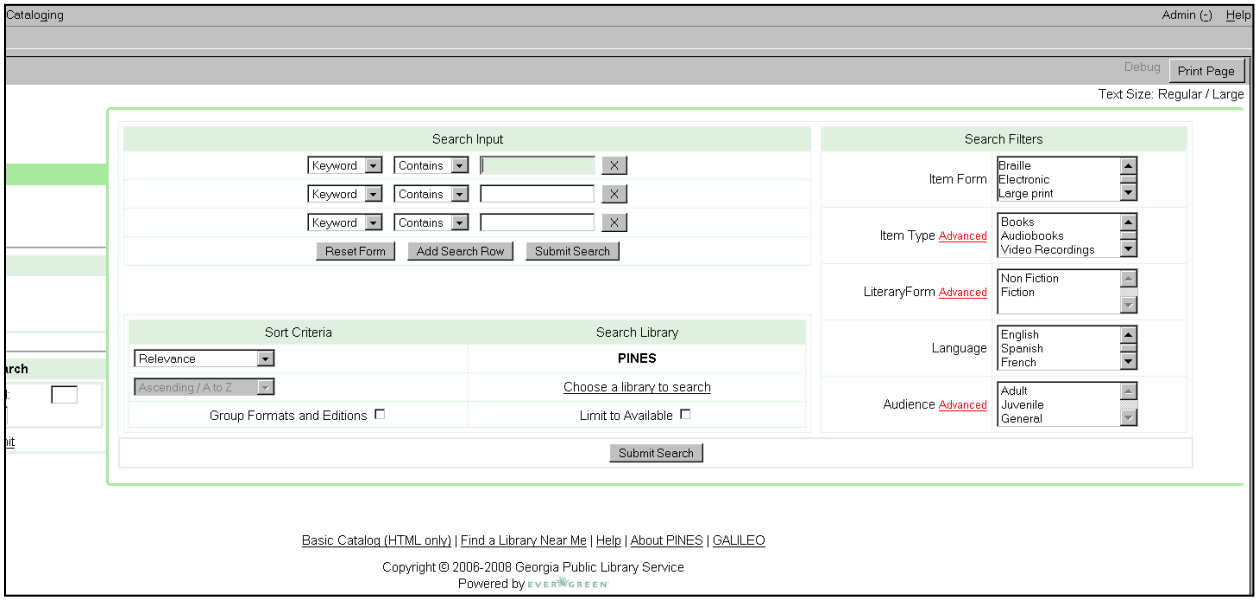
Sort your results by

- Relevance
- Author
- Title
- Publication date

You can further refine your search by

- Changing the library you are searching
- Or search all of PINES
- Add additional search rows as needed
- Group titles by formats and editions
- Limit to only available items

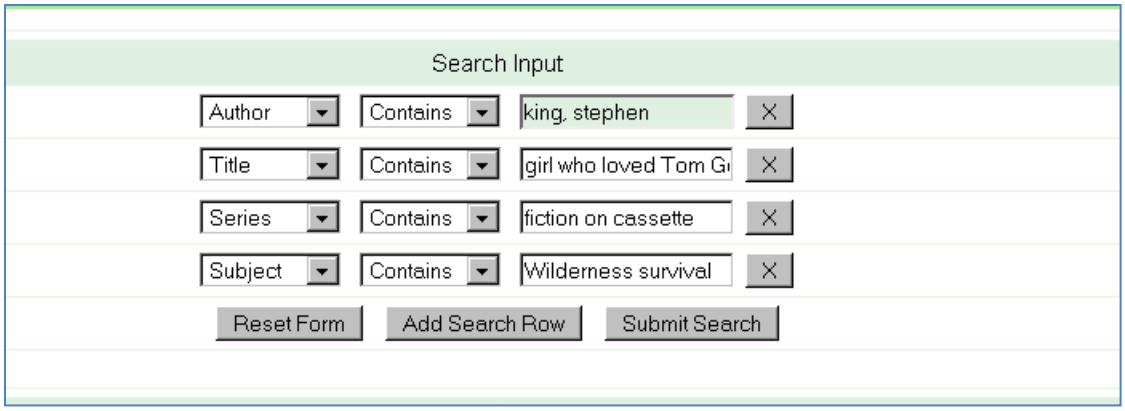
The default is three keyword search boxes with no filtering activated, sort criteria to relevance, and your default library search. Search values are retained in the search wells. The reset form button clears the retained values.



Drop-down menus at the search wells allow you to select the type of search you need. Another drop-down menu refines your search from **Contains** to **Does not Contain** or **Matches Exactly**. The **X** at the end of each row deletes that row. The **Add Search Row** button adds rows as needed.

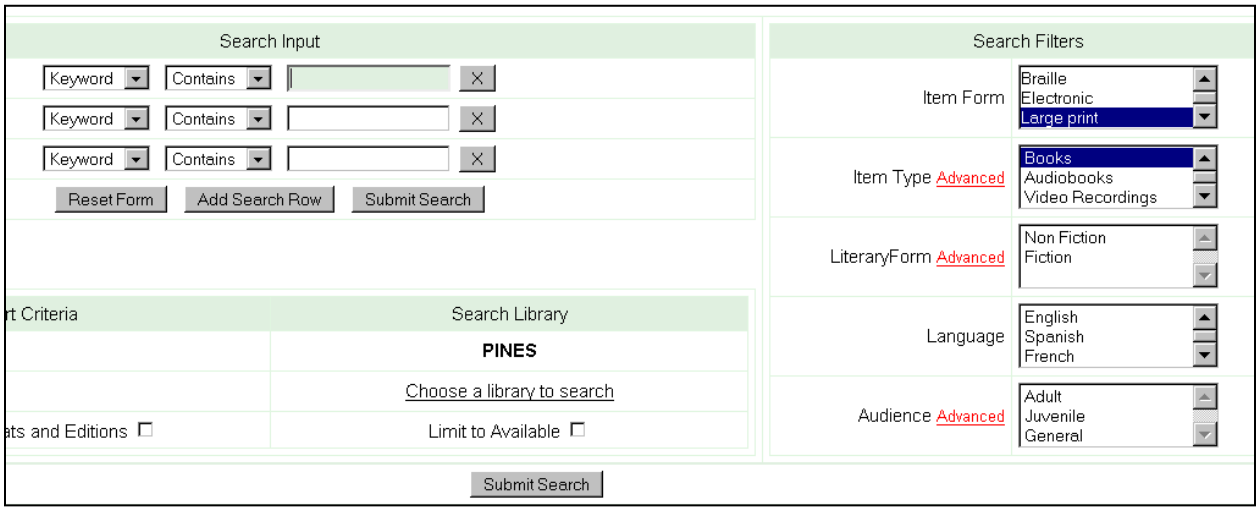
2.4.2.1 Combination searches

You can refine your search by combining search types in different boxes:



2.4.2.2 Use of Filters to qualify key-word searches

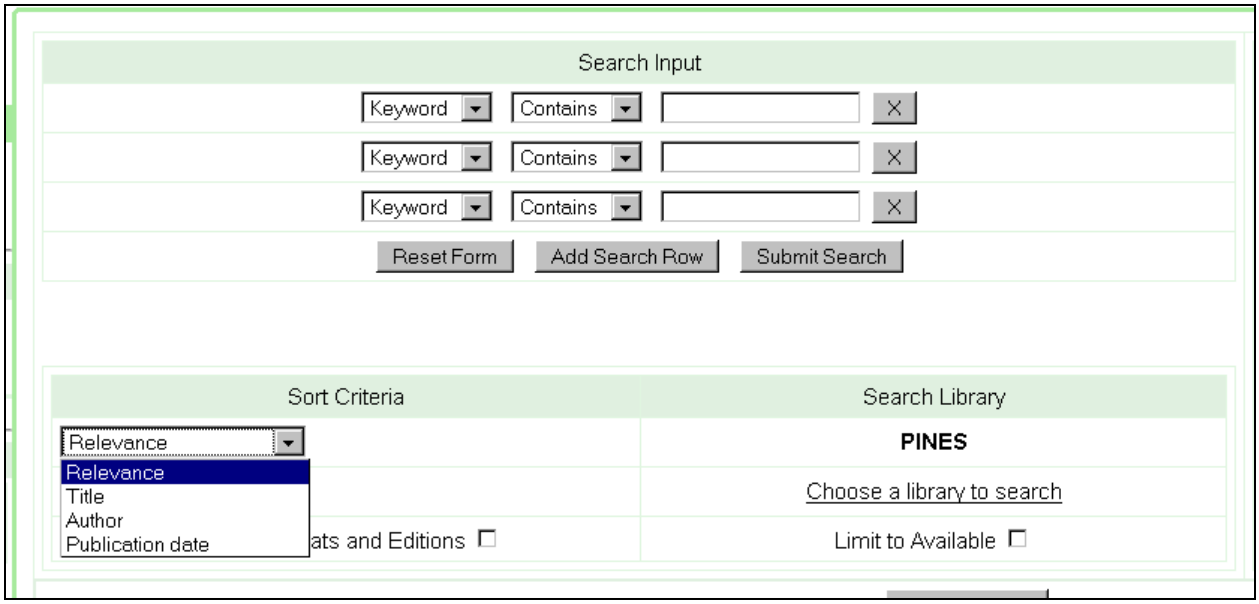
Searching can be qualified or filtered by form, type, literary type, language or audience. The filters are on the right-hand of searching screen. Click one of the forms to select and **CTRL** click on the value to de-select. You can select multiple filters for one search.



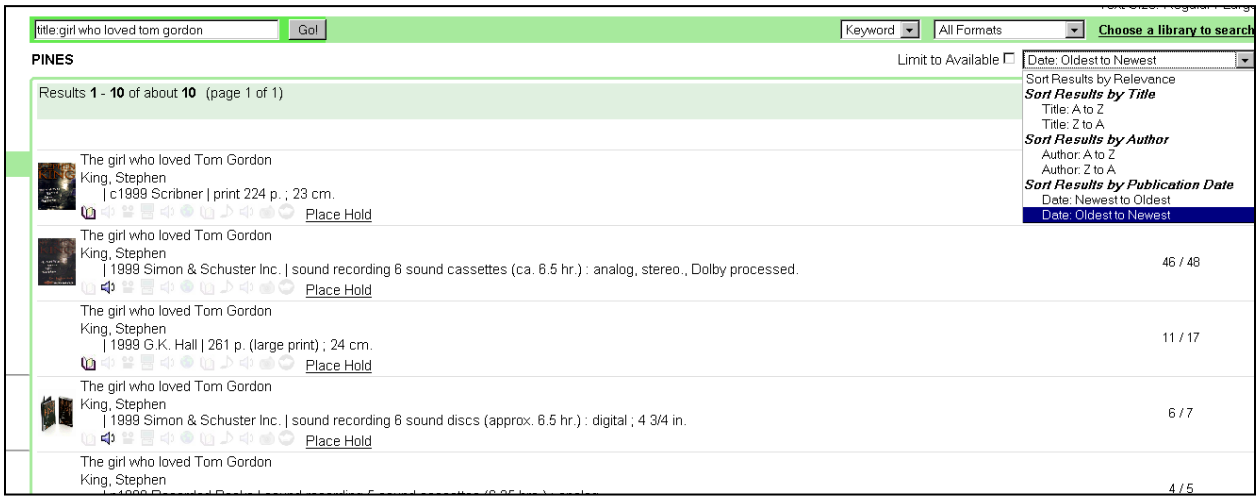
NOTE: If the bibliographic record is not correctly coded, or is coded differently than what you might expect, filtering results will be compromised.

2.4.2.3 Sorting your results

You can sort your result set by **Relevance**, **Title**, **Author** or **Publication Date** either at the search input or after the result set is returned. The default sort is **Relevance.**



After your results have returned, sort them by using the drop-down menu on the right hand side of the screen:

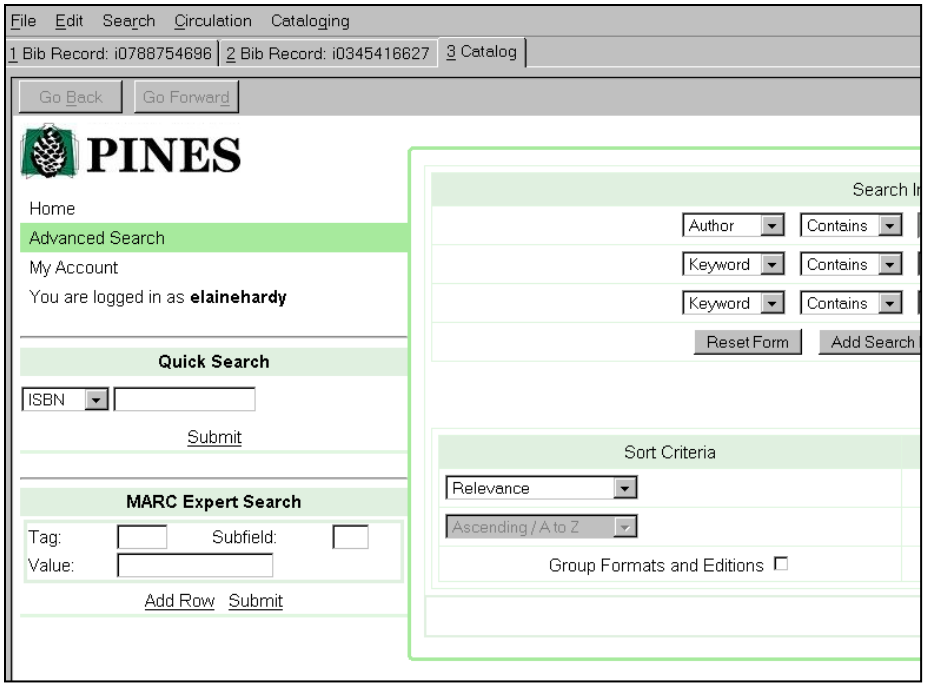


Title, author, and publication date sorts can all be further sorted by ascending or descending order.

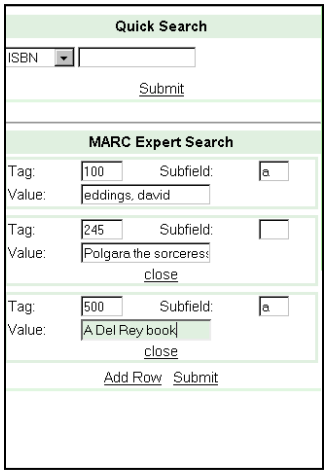
2.4.3 MARC Expert Search

The **MARC Expert Search** searches specific information in any MARC field or sub-field. You can enter multiple rows to refine your search.

The **MARC Expert Search** is located on the lower left of the screen, under the **Quick Search** area:



A few sample searches using the **MARC Expert Search**:



NOTE: As of release 1.4.0.7, this search may not function correctly in the PINES catalog.

2.4.4 Searching ISBNs

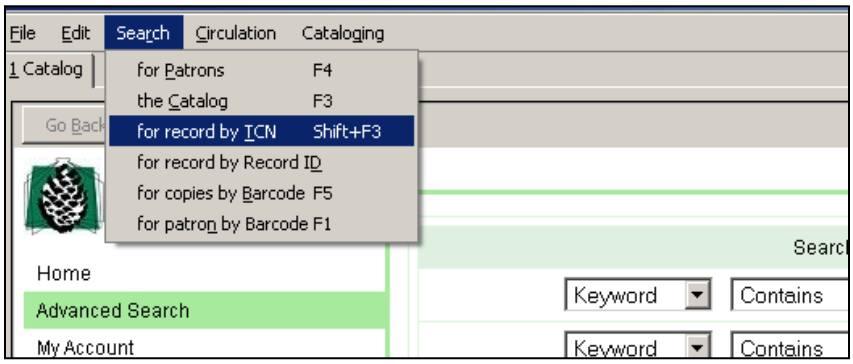
Currently, the quickest and most efficient method for searching ISBNs is to use the ISBN search under **Quick Search**. You can search ISBNs using the keyword search either in the advanced or basic search screens; but, this search may not retrieve all records with a given ISBN if the number is one of several on a bibliographic record. ISBNs entered in |z of the 020 or that are not the first of several may not retrieve. ISBNs should be entered without dashes. Both ISBN-10 and ISBN-13s are searchable. **Note:** If the title record was added to the PINES before ISBN-13s came into use, there may not be one in the MARC record so a search for an ISBN-13 will not retrieve the record.

2.4.5 Searching title control numbers (TCNs)

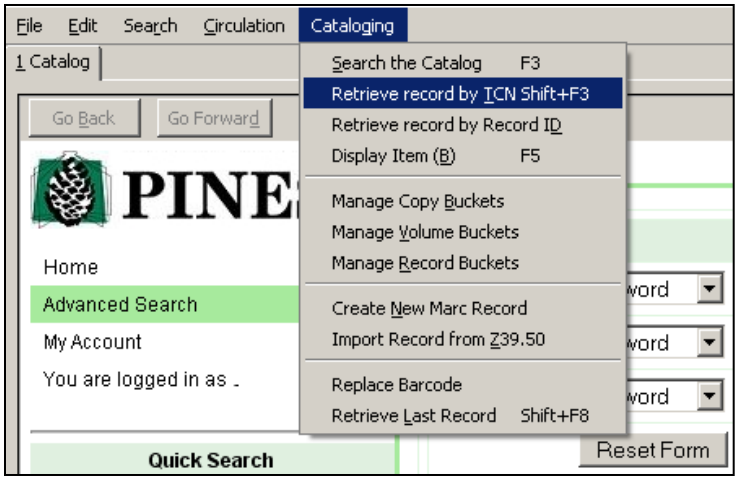
TCNs also can be searched from several different places in Evergreen. You can use the keyboard command **SHIFT F3** to access the TCN search box. Prefixes must be included in the search query and searching is case sensitive. Examples of TCNs include: ocm54694698; i0684844613; PIN92064633; l81643819 ("l" is lower case L); a2263914.

Older records in the PINES database can have differing TCNs in different control fields within a single MARC record. In these records, TCN is indexed from the 901 field (if present) or from the 035 (if present) and not from the 001. NOTE: Overlaying a current OCLC record will correct the problem of multiple TCNs.

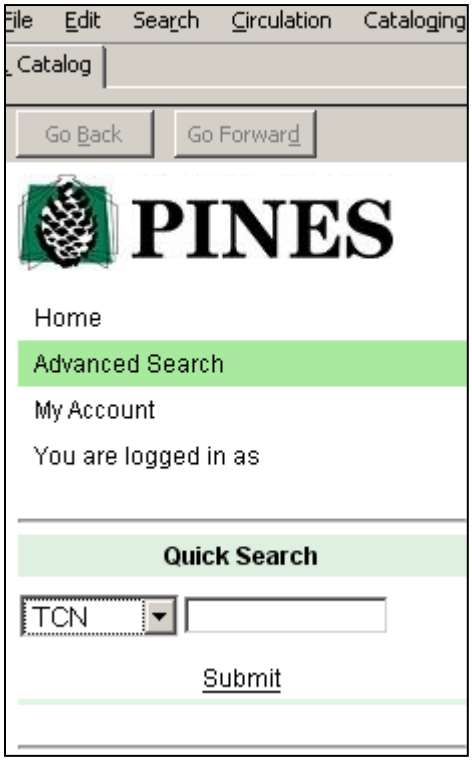
TCN searches can be keyed from the **Search** menu (**Search—For record by TCN**):



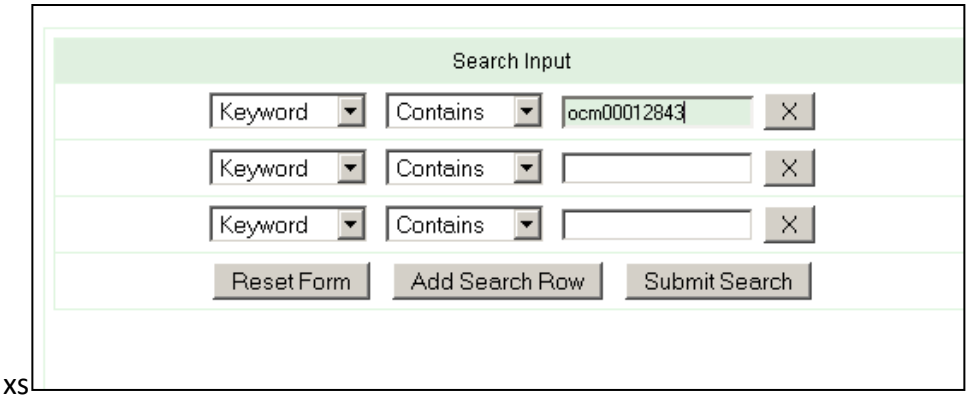
TCNs under the **Cataloging** menu (**Cataloging—Retrieve record by TCN**):



The **Quick Search** box also contains a TCN search:



You can also do a keyword search for TCNs if they are coded in 001 tags in bibliographic records.



XS

2.4.6 Searching Library of Congress Control Number (LCCN)

LCCNs can be searched either in **Quick Search** or as a keyword search. Input the LCCN with a "0" in place of the hyphen, e.g. 98084431 rather than 98-84431. Include any prefixes.

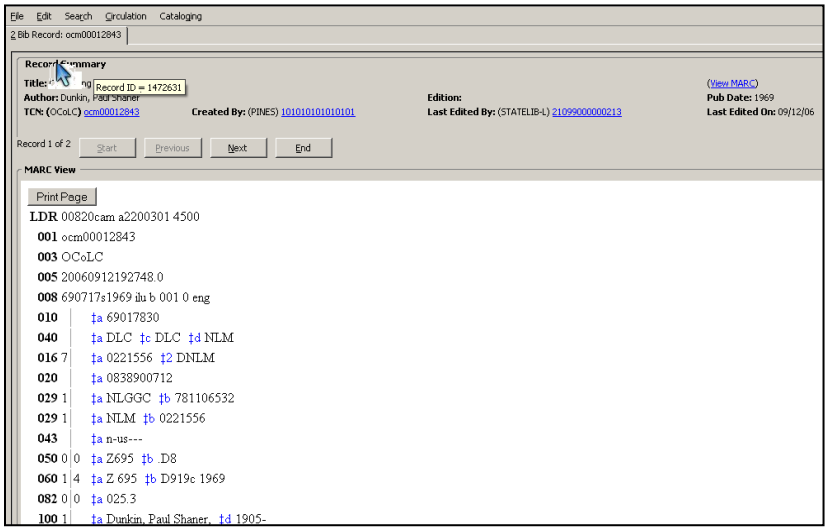
2.4.7 Searching ISSNs

For ISSN searches, retain the hyphen: 0278-3207. As with ISBNs, ISSNs can be searched as a keyword or as an option from the drop-down menu in **Quick Search**.

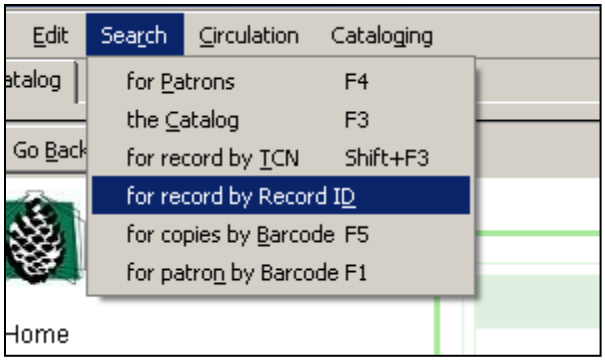
NOTE: As of release 1.4.0.7, some ISSNs will not retrieve with a **Quick Search**.

2.4.8 Searching by record ID

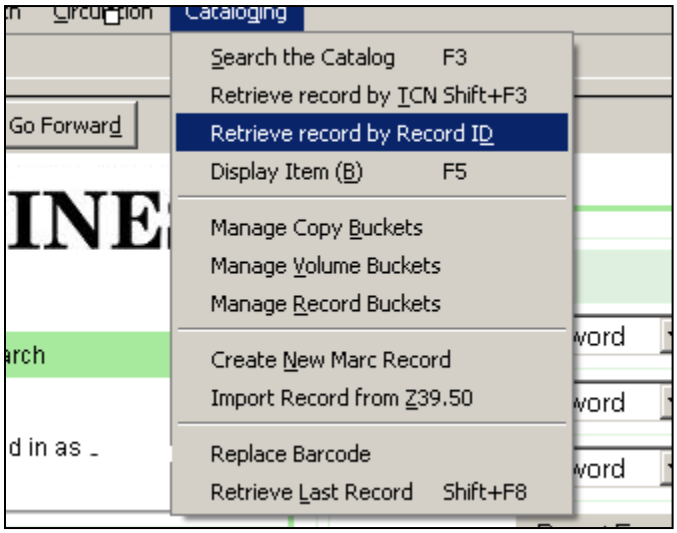
The record ID is a unique internal number assigned by the Evergreen software to each bibliographic record (i.e. #1472631 for ocm00012843). It is similar to OCLC's title control numbers in this regard. The Record ID is available as a column in the **Record Buckets** interface and **Item Status** (**F5**) and also as a tool tip if you hold your mouse cursor over the **Record Summary** label for a record.



Record IDs can be searched under **Search—For record by Record ID**:

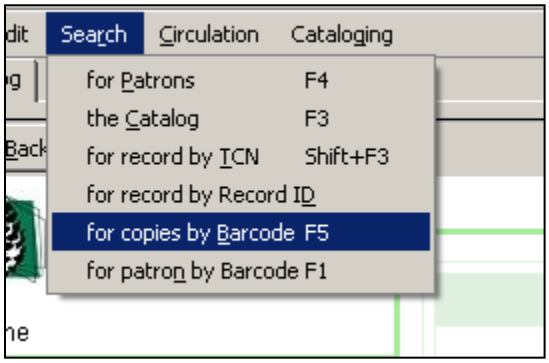


And **Catalog—Retrieve record by Record ID**.



2.4.9 Searching by Barcode

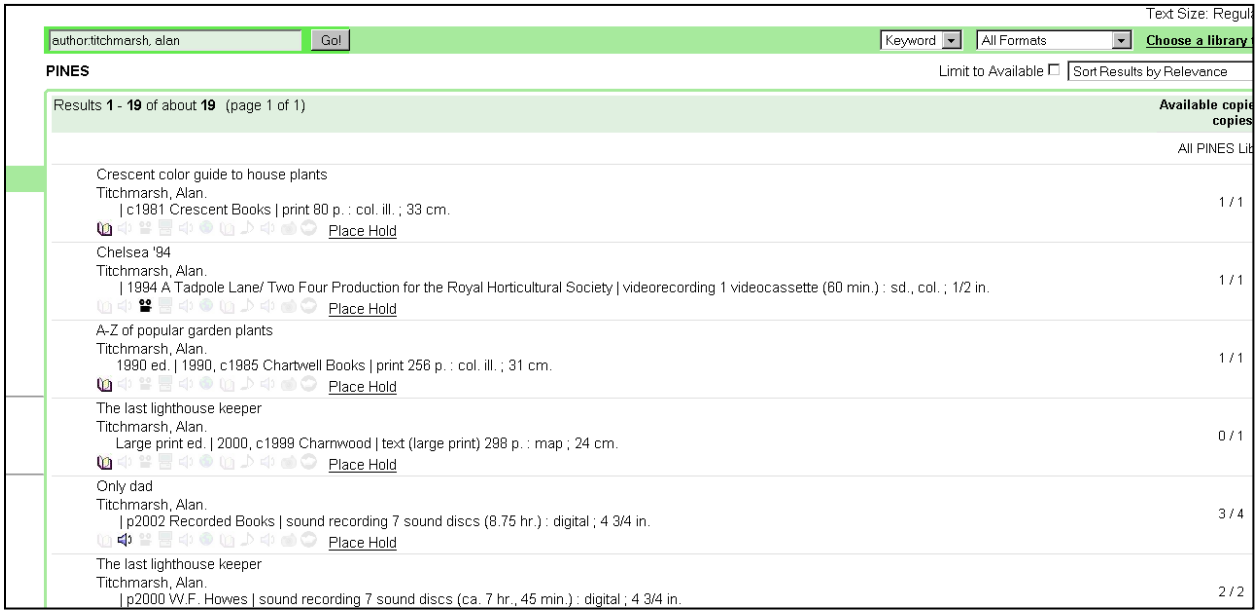
Records can also be retrieved by an item barcode under **Quick Search** or under **Search—for copies by Barcode**, or using the keyboard command **F5**.



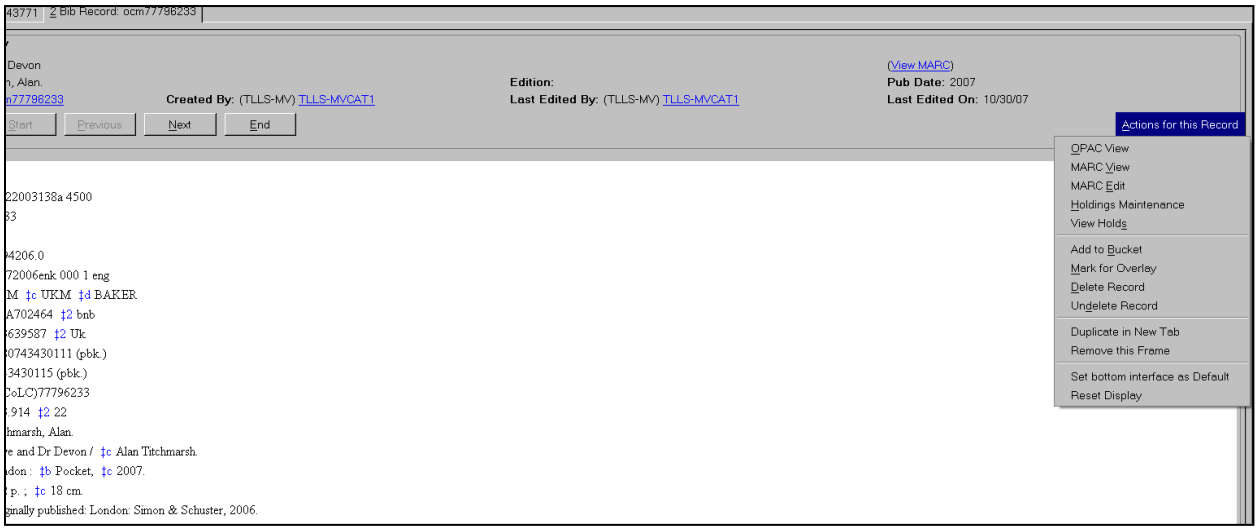
Chapter 3 Bibliographic Record display

Evergreen displays the title record and holdings information in different ways. Navigating through the various displays is done through the **Actions for this Record** menu which is accessed once you have an individual bibliographic record in view.

To retrieve a record in any display, choose a record from the results of your search by clicking on the title (clicking on the author will display a list of all titles by that author)



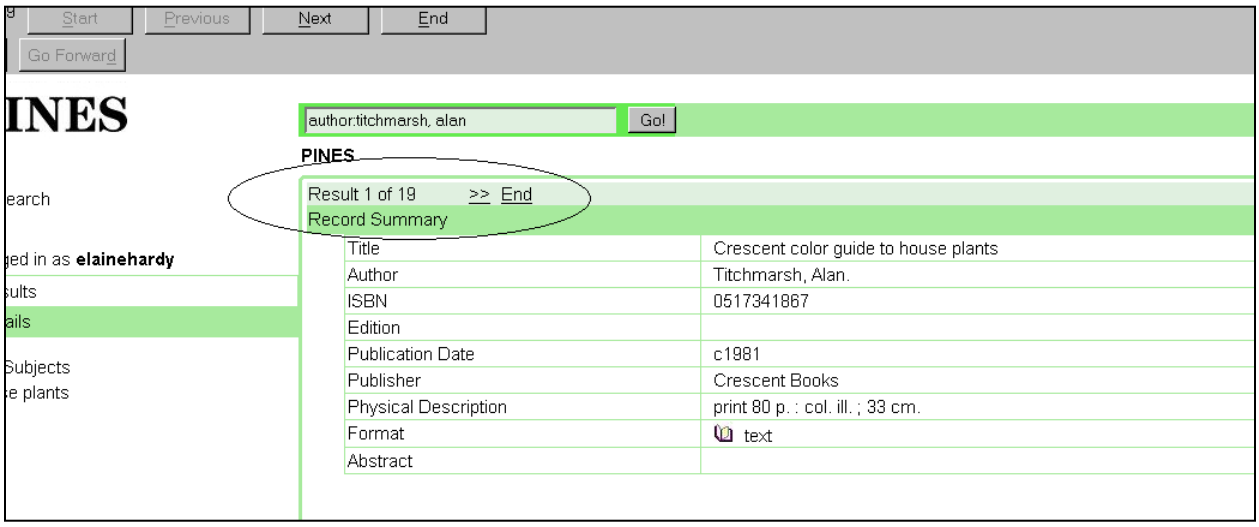
Use the **Actions for this Record** menu located on the right hand side of the screen in the upper, **Record Summary**, portion of the screen or use the keyboard command **ALT A**:



3.1 OPAC Display

The default display is the **OPAC View** of the title:

You can navigate through the records in the result set from a record in this display:



The **OPAC View** does not typically contain enough information from the MARC record for catalogers to judge whether it matches an item in hand or another record for database clean-up. The two MARC displays show the complete MARC record needed for these critical cataloging functions.

3.2 MARC View

The **MARC View** displays the MARC record:

File Edit Search Circulation Cataloging Admin (

1 Bib Record: ocn184823014 | 2 Z39.50 | 3 Record Buckets

Record Summary

Title: By schism rent asunder (View MARC)
Author: Weber, David **Edition:** 1st ed. **Pub Date:** 2008
TCN: (OCoLC) ocn184823014 **Created By:** (FRRLS-PT) brodart-frrls **Last Edited By:** (CLAYTN-HQS) 21012001658442 **Last Edited On:** 01/29/09

Record 1 of 1 Start Previous Next End Actions for this

MARC View

Print Page

```
LDR 02210cam 2200397 a 4500
001 ocn184823014
003 OCoLC
005 20090129210156.0
008 080414s2008 nyub 000 1 eng
010     ‡a 2008016957
040     ‡a DLC ‡c DLC ‡d BTCTA ‡d BAKER ‡d YDXCP ‡d UPZ ‡d C#P ‡d VP@ ‡d BWX ‡d SINLB
020     ‡a 9780765315014
020     ‡a 0765315017
035     ‡a (OCoLC)184823014
050 0 0 ‡a PS3573.E217 ‡b B9 2008
082 0 0 ‡a 813/.54 ‡2 22
100 1   ‡a Weber, David, ‡d 1952-
245 1 0 ‡a By schism rent asunder / ‡c David Weber.
250     ‡a 1st ed.
260     ‡a New York : ‡b TOR, ‡c 2008.
300     ‡a 510 p. : ‡b maps ; ‡c 25 cm.
500     ‡a "A Tom Doherty Associates book."
520     ‡a Despite the implacable hostility of the Church of God Awaiting, Charis still stands, still free, still tolerant, still an island of innovation in a world in which the Church has worked for centuries to keep humanity locked at a medieval level of existence. But
        powerful men who run the Church aren't going to take their defeat lying down. Charis may control the world's seas, but it barely has an army worthy of the name. And as King Cayleb knows, far too much of the kingdom's recent good fortune is due to the
        secret manipulations of the being that calls himself Merlin--a being that, the world must not find out too soon, is more than human. A being on whose shoulders rests the last chance for humanity's freedom.--From publisher description.
655   7 ‡a Fantasy fiction. ‡2 gsafd
650   0 ‡a Space warfare ‡v Fiction.
856 4 2 ‡3 Contributor biographical information ‡u http://www.loc.gov/catdir/enhancements/fy0829/2008016957-b.html
856 4 2 ‡3 Publisher description ‡u http://www.loc.gov/catdir/enhancements/fy0829/2008016957-d.html
856 4 1 ‡3 Sample text ‡u http://www.loc.gov/catdir/enhancements/fy0838/2008016957-s.html
994     ‡a Z0 ‡b ZGH
```

This view is very useful to use when determining the best matching record.

3.3 MARC Edit

The **MARC Edit** view allows catalogers to edit the bibliographic record:

File Edit Search Circulation Cataloging Admin (

1 Bib Record: ocn184823014 | 2 Z39.50 | 3 Record Buckets

Record Summary

Title: By schism rent asunder (View MARC)
Author: Weber, David **Edition:** 1st ed. **Pub Date:** 2008
TCN: (OCoLC) ocn184823014 **Created By:** (FRRLS-PT) brodart-frrls **Last Edited By:** (CLAYTN-HQS) 21012001658442 **Last Edited On:** 01/29/09

Record 1 of 1 Start Previous Next End Actions for this

Options

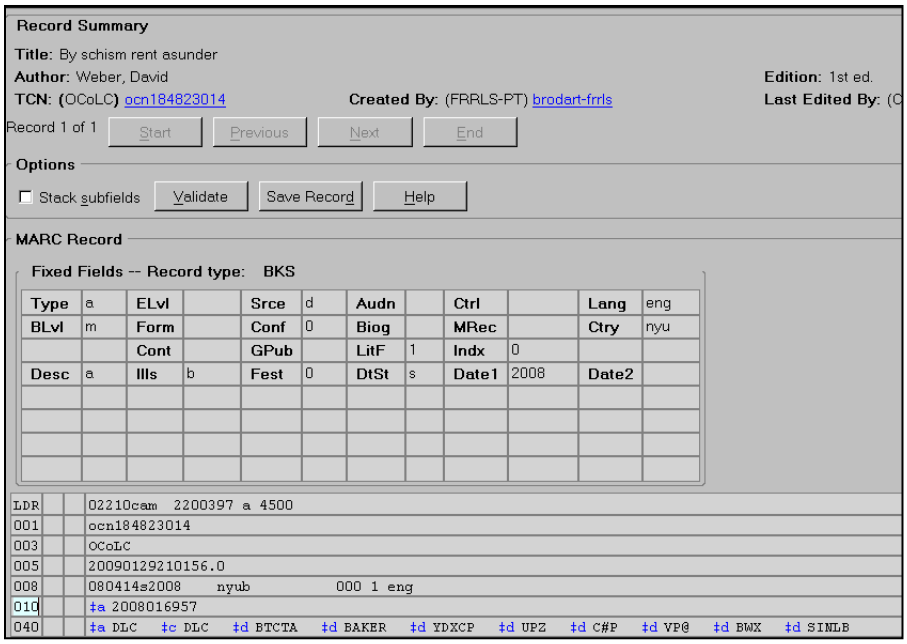
☐ Stack subfields Validate Save Record Help

MARC Record

Fixed Fields -- Record type: BKS

```
LDR     02210cam 2200397 a 4500
001     ocn184823014
003     OCoLC
005     20090129210156.0
008     080414s2008     nyub            000 1 eng
010     ‡a 2008016957
040     ‡a DLC   ‡c DLC   ‡d BTCTA   ‡d BAKER   ‡d YDXCP   ‡d UPZ   ‡d C#P   ‡d VP@   ‡d BWX   ‡d SINLB
020     ‡a 9780765315014
020     ‡a 0765315017
035     ‡a (OCoLC)184823014
050 0 0 ‡a PS3573.E217   ‡b B9 2008
082 0 0 ‡a 813/.54   ‡2 22
100 1   ‡a Weber, David,   ‡d 1952-
245 1 0 ‡a By schism rent asunder /   ‡c David Weber.
250     ‡a 1st ed.
260     ‡a New York :   ‡b TOR,   ‡c 2008.
300     ‡a 510 p. :   ‡b maps ;   ‡c 25 cm.
500     ‡a "A Tom Doherty Associates book."
520     ‡a Despite the implacable hostility of the Church of God Awaiting, Charis still stands, still free, still tolerant, still an island of innovation in a world in which the Church has worked for
655   7 ‡a Fantasy fiction.   ‡2 gsafd
650   0 ‡a Space warfare   ‡v Fiction.
856 4 2 ‡3 Contributor biographical information   ‡u http://www.loc.gov/catdir/enhancements/fy0829/2008016957-b.html
856 4 2 ‡3 Publisher description   ‡u http://www.loc.gov/catdir/enhancements/fy0829/2008016957-d.html
856 4 1 ‡3 Sample text   ‡u http://www.loc.gov/catdir/enhancements/fy0838/2008016957-s.html
994     ‡a Z0   ‡b ZGH
```

The default display of the fixed field is the MARC21 fields. If you prefer the OCLC type display, double click on "**Fixed fields**" to toggle to the grid:



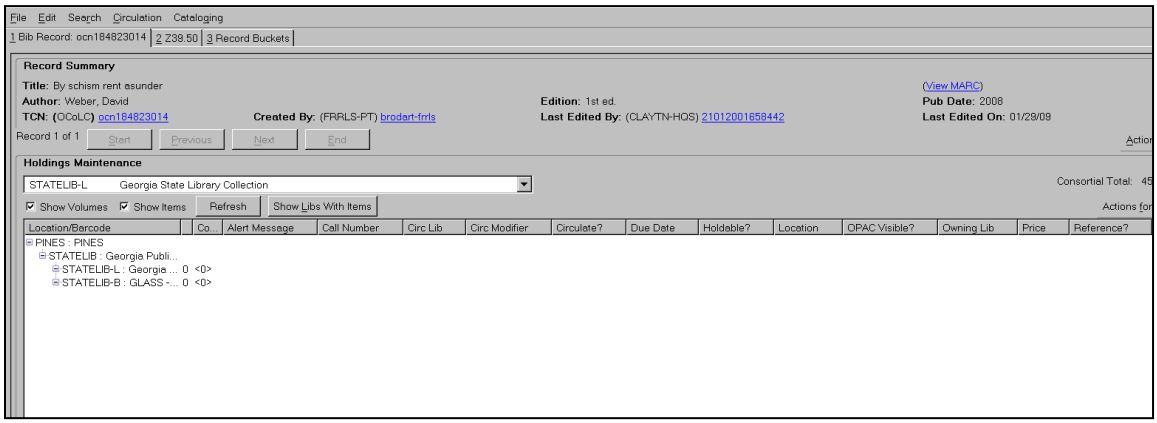
The grid display then becomes the default for your workstation. Double clicking the words "**fixed fields**" again returns to the MARC21 display.

Further instructions on the functionality of the MARC edit interface are covered in the chapter on **Title Record Maintenance** of this manual.

3.4 Holdings Maintenance

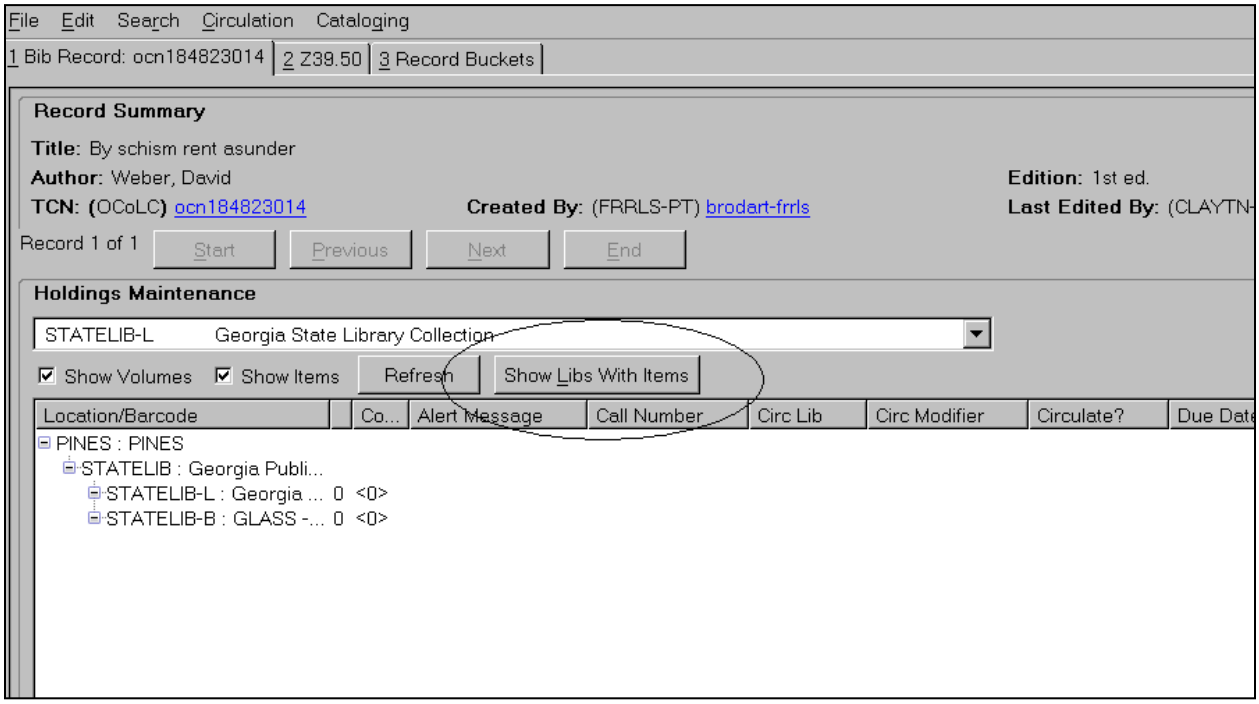
Holdings Maintenance is the access to library holding data so that catalogers can view, add, edit or delete volumes or copies, individually or several simultaneously.

Your library will be at the top and the default view is just your library's holdings. Here, we are signed in as STATELIB-L:



A count of the consortial total items and available items is displayed immediately below **Actions for this Record**:

To see all libraries with items attached to this title record, click on the button **Show Libs With Items** or **ALT L**:



You can choose to see all volumes and items:

File Edit Search Circulation Cataloging

1 Bib Record: ocn184823014 | 2 Z39.50 | 3 Record Buckets

Record Summary

Title: By schism rent asunder (View MARC)
Author: Weber, David **Edition:** 1st ed. **Pub Date:** 2008
TCN: (OCoLC) ocn184823014 **Created By:** (FRRLS-PT) brodart-frrls **Last Edited By:** (CLAYTN-HQS) 21012001658442 **Last Edited On:** 01/29/09

Record 1 of 1 Start Previous Next End Actions for

Holdings Maintenance

STATELIB-L Georgia State Library Collection Consortial Total: 45 Ave

☑ Show Volumes ☑ Show Items Refresh Show Libs With Items Actions for Sele

Location/Barcode			Call Number	Circ Lib	Circ Modifier	Circulate?	Due Date	Holdable?	Location	OPAC Visible?	Owning Lib	Price	Reference?	Stat
PINES : PINES														
STATELIB : Georgia Public Library Service														
STATELIB-L : Georgia State Library Collection	0	...												
STATELIB-B : GLASS - Georgia Library for Acc...	0	...												
CCL : Catoosa County Library														
CCL-RING : Catoosa County Library	1	...												
WEBER, DAVID		1	WEBER, DA...								CCL-RING			
31687002412309			WEBER, DA...	CCL-RING	book	Yes		Yes	Stacks	Yes	CCL-RING	26.00	No	Avail
CLAYTN : Clayton County Library System														
CLAYTN-FOR : Forest Park Branch	1	...												
A FIC WEBER, DAVID		1	A FIC WEBE...								CLAYTN-FOR			
31012002832028			A FIC WEBE...	CLAYTN-F...	book	Yes	2009-03-02	Yes	STACKS	Yes	CLAYTN-FOR	25.95	No	Chec
CLAYTN-HQS : Headquarters Library	1	...												
A FIC WEBER, DAVID		1	A FIC WEBE...								CLAYTN-HQS			
31012002832101			A FIC WEBE...	CLAYTN-H...	book	Yes	2009-02-28	Yes	STACKS	Yes	CLAYTN-HQS	25.95	No	Chec
CLAYTN-JON : Jonesboro Branch	1	...												
A FIC WEBER, DAVID		1	A FIC WEBE...								CLAYTN-JON			
31012002832069			A FIC WEBE...	CLAYTN-J...	book	Yes		Yes	STACKS	Yes	CLAYTN-JON	25.95	No	Avail
CLAYTN-LOV : Lovejoy Branch	1	...												
A FIC WEBER, DAVID		1	A FIC WEBE...								CLAYTN-LOV			
31012002832143			A FIC WEBE...	CLAYTN-L...	book	Yes		Yes	STACKS	Yes	CLAYTN-LOV	25.95	No	Avail

Just see volumes:

File Edit Search Circulation Cataloging

1 Bib Record: ocn184823014 | 2 Z39.50 | 3 Record Buckets

Record Summary

Title: By schism rent asunder (View MARC)
Author: Weber, David **Edition:** 1st ed. **Pub Date:** 2008
TCN: (OCoLC) ocn184823014 **Created By:** (FRRLS-PT) brodart-frrls **Last Edited By:** (CLAYTN-HQS) 21012001658442 **Last Edited On:** 01/29/0

Record 1 of 1 Start Previous Next End

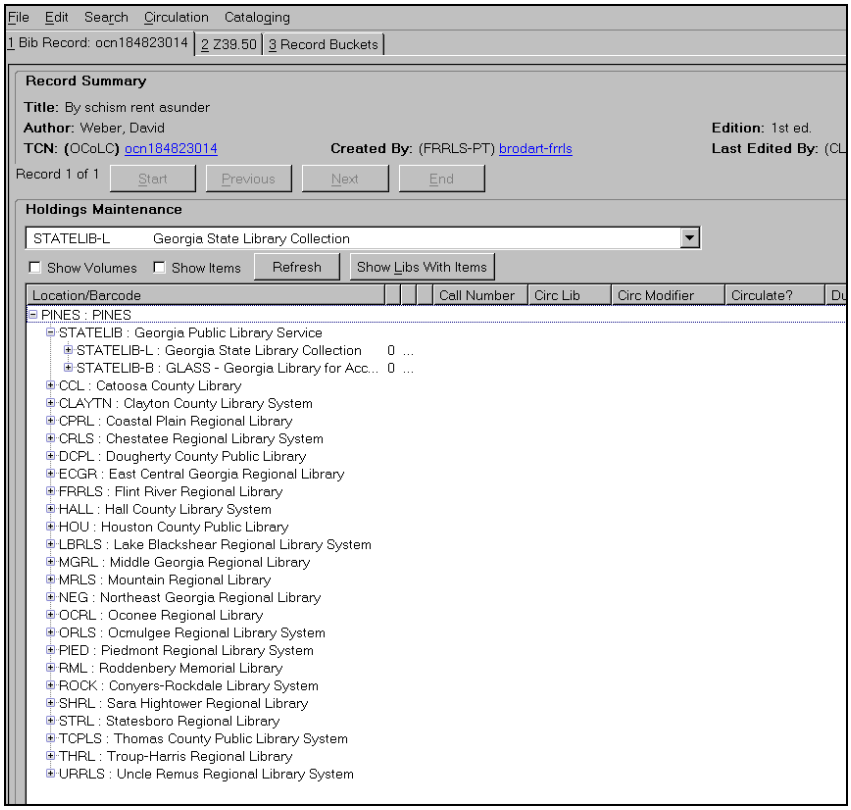
Holdings Maintenance

STATELIB-L Georgia State Library Collection

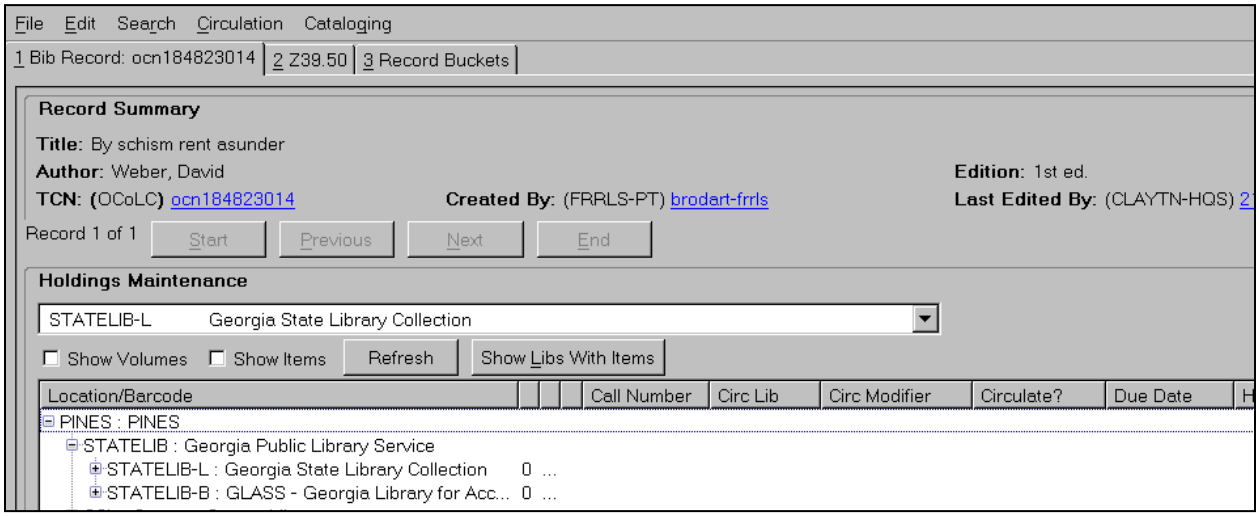
☑ Show Volumes ☐ Show Items Refresh Show Libs With Items

Location/Barcode			Call Number	Circ Lib	Circ Modifier	Circulate?	Due Date	Holdable?	Location	OPAC Visible?	Owning Lib	Price
PINES : PINES												
STATELIB : Georgia Public Library Service												
STATELIB-L : Georgia State Library Collection	0	...										
STATELIB-B : GLASS - Georgia Library for Acc...	0	...										
CCL : Catoosa County Library												
CCL-RING : Catoosa County Library	1	...										
WEBER, DAVID		1	WEBER, DA...								CCL-RING	
CLAYTN : Clayton County Library System												
CLAYTN-FOR : Forest Park Branch	1	...										
A FIC WEBER, DAVID		1	A FIC WEBE...								CLAYTN-FOR	
CLAYTN-HQS : Headquarters Library	1	...										
A FIC WEBER, DAVID		1	A FIC WEBE...								CLAYTN-HQS	
CLAYTN-JON : Jonesboro Branch	1	...										
A FIC WEBER, DAVID		1	A FIC WEBE...								CLAYTN-JON	
CLAYTN-LOV : Lovejoy Branch	1	...										
A FIC WEBER, DAVID		1	A FIC WEBE...								CLAYTN-LOV	
CLAYTN-MOR : Morrow Branch	1	...										
A FIC WEBER, DAVID		1	A FIC WEBE...								CLAYTN-MOR	
CLAYTN-RIV : Riverdale Branch	1	...										
A FIC WEBER, DAVID		1	A FIC WEBE...								CLAYTN-RIV	
CPRL : Coastal Plain Regional Library												
CPRL-T : Tifton-Tift County Public Library	1	...										
F WEBER, DAVID		1	F WEBER, D...								CPRL-T	
CPRL-A : Victoria Evans Memorial Library	0	...										
CPRL-B : Carrie Dorsey Perry Memorial Library	0	...										
CPRL-BKM : Bookmobile	0	...										
CPRL-C : Cook County Library	0	...										

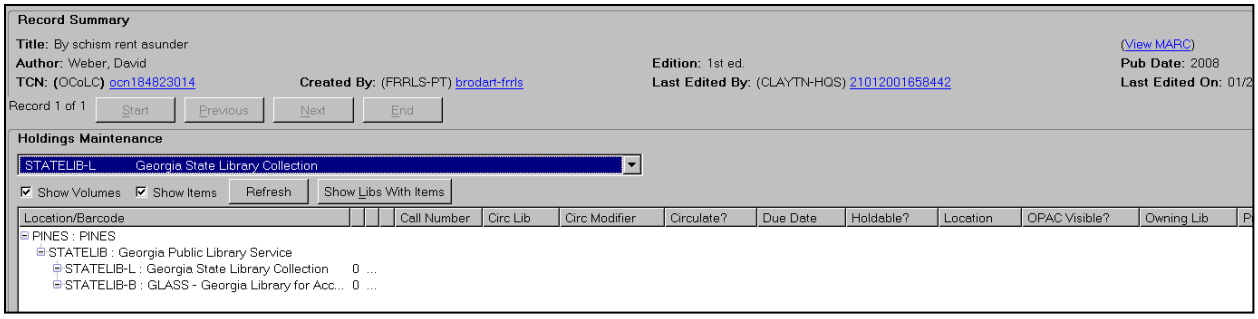
Or just the regional systems with holdings:



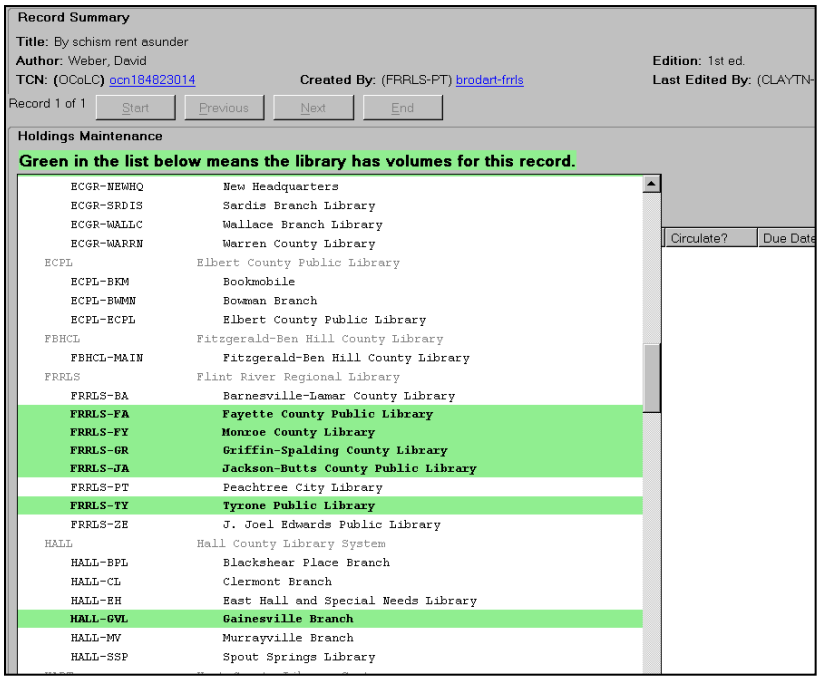
You navigate through these options by checking or unchecking the **Show Volumes** and **Show Items** boxes:



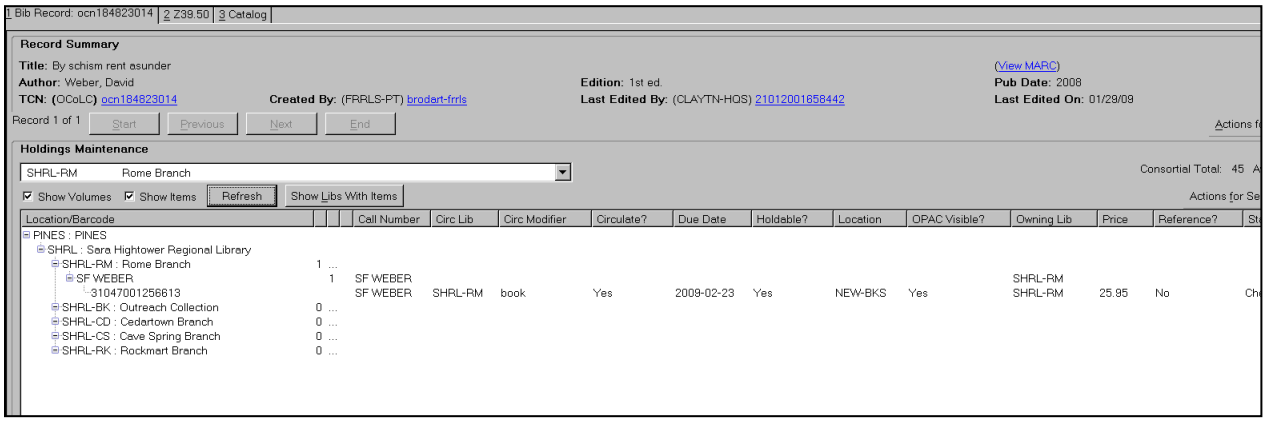
You can view a single library's holdings by choosing them from the drop-down menu immediately under **Holdings Maintenance**:



Libraries highlighted in green have volumes and items attached:



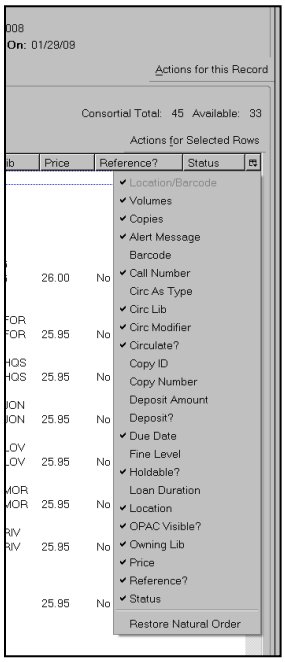
Once you have chosen a specific library, it will be the default library displayed in **Holdings Maintenance** for your current workstation session until you select another library:



3.4.1 Manipulating columns and the Column Picker

You can control what item attributes are displayed in the **Holdings Maintenance** screen by using the column picker on the right hand side of the screen:

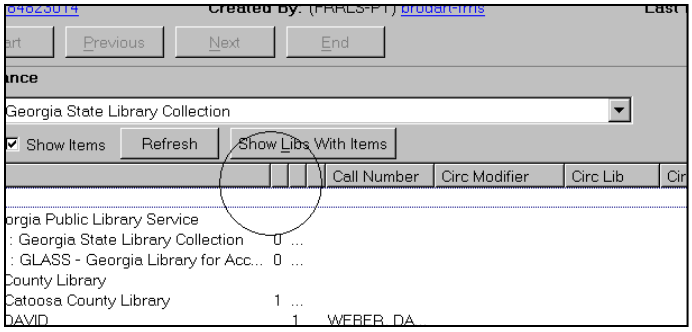
Click on each entry to check or uncheck:



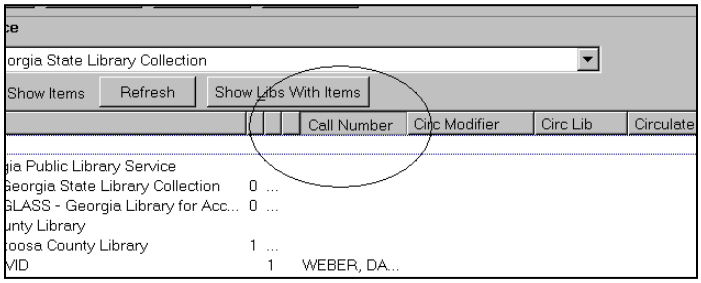
Your choices become the default for your login.

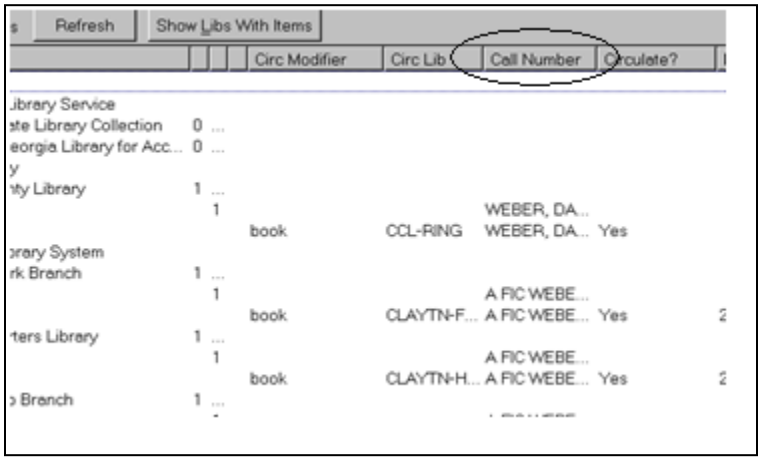
Once you have chosen the attributes you want displayed for your volumes, you can manipulate their order and display area.

Place your cursor over the lines between columns to increase or decrease the display area for that column:

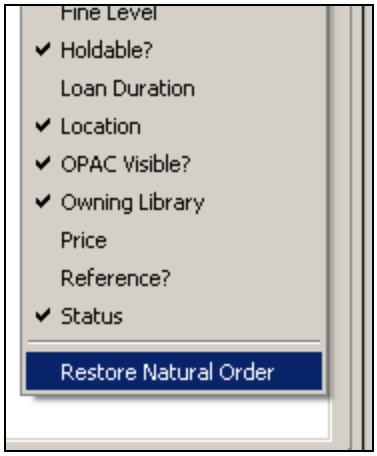


You can change the order in which the attributes are displayed by grabbing the column with the mouse and moving it. With your cursor on the column heading, depress and hold the left mouse button, then move the cursor to your desired location:

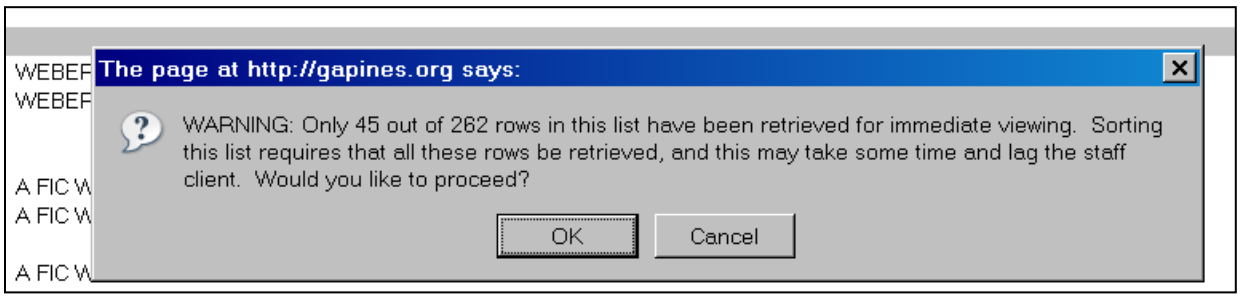




You can restore the system defaults by clicking on **Restore Natural Order** in the column picker:



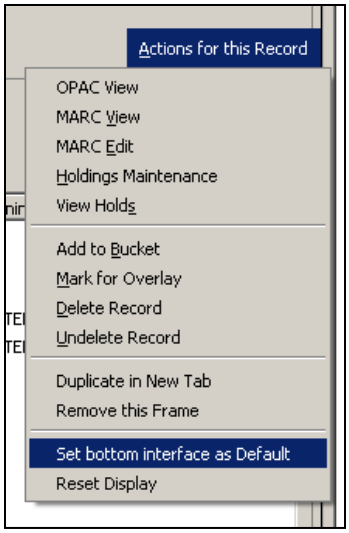
To sort by different columns, click once on the heading using the left mouse button. If there are a large number of items attached to a title you may get a warning message similar to the following:



Either cancel or click **OK**.

3.6 Setting default display

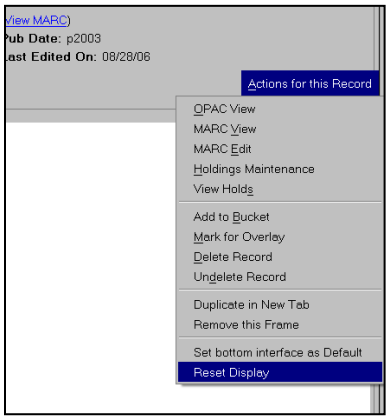
You can set your default interface display from here as well. For cataloging purposes, either MARC view or MARC edit is probably the best view to evaluate MARC records for matching and editing. Choose the interface you prefer and then click on **Set Bottom Interface as Default**



Your chosen display will be the default each time you login to Evergreen. You can change the default display as needed for specific tasks.

3.7 Reset display

Choosing **Reset Display** from the **Actions for this Record** menu returns to your default display and displays any changes to the record you may have made:

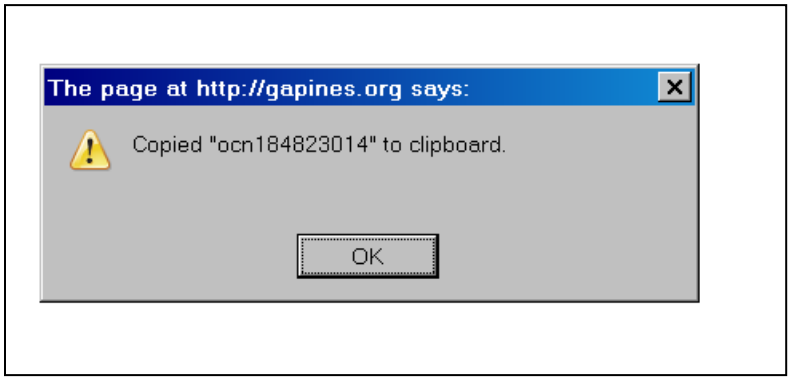


It is good practice to reset the display after editing or merging bibliographic records, in order to verify changes made to the record. Alterations made in **MARC Edit** are not immediately displayed in the **OPAC View** using the reset display function.

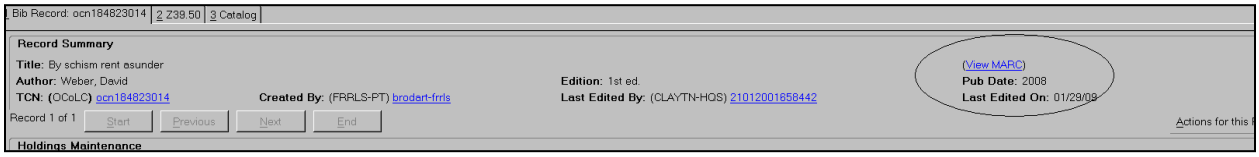
3.8 Record Summary

The **Record Summary** appears at the top of the screen after you have chosen one of the three displays for a bibliographic record. The summary remains on that tab until you choose another record. In addition to title, author, edition (if present in the MARC record), and publication date, the summary also includes the title control number (TCN) and identifiers for the creator and last editor of the title record.

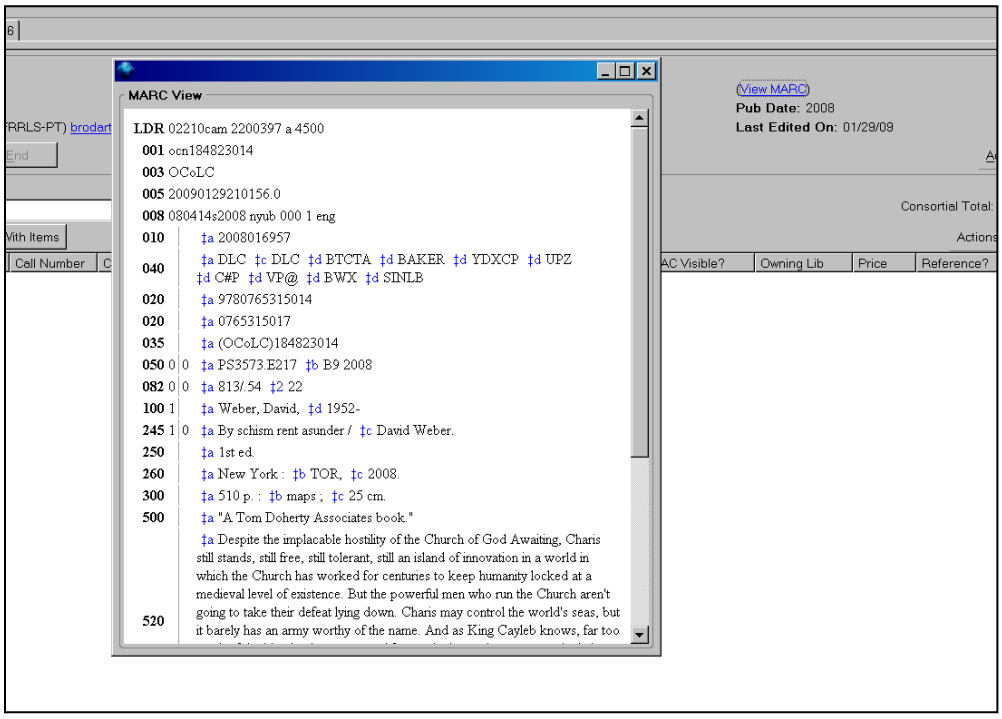
Clicking on the blue number or identifier, copies the information to your clipboard so that you can paste it into another tab or application.



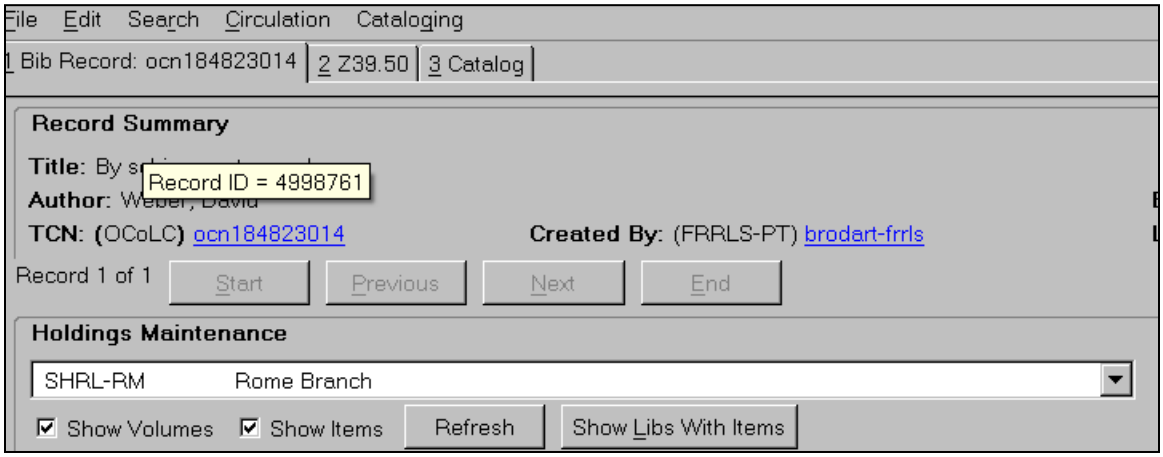
You can also quickly view the MARC record from the summary:



A new dialog box opens with the MARC record:

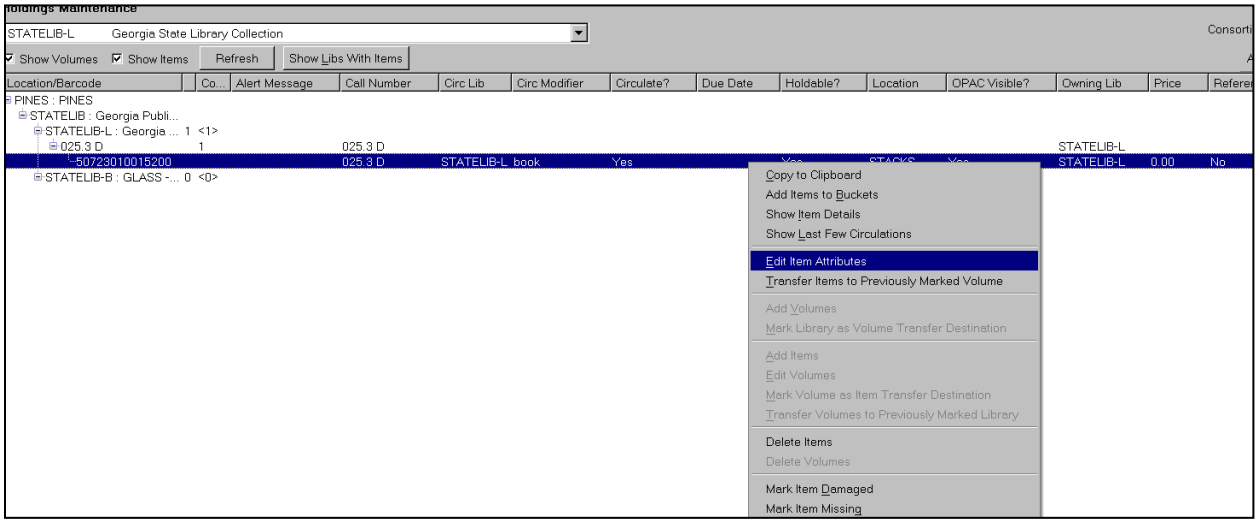


You can also display the record id number from the **Record Summary**. The record id is a unique number assigned by the system to each bibliographic record. Place your cursor over the words "**Record Summary**" to retrieve the record ID:

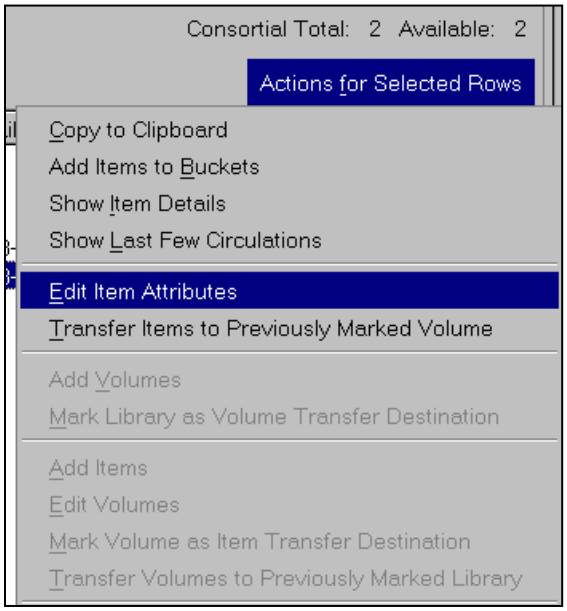


Chapter 4 Navigating the Copy Editor

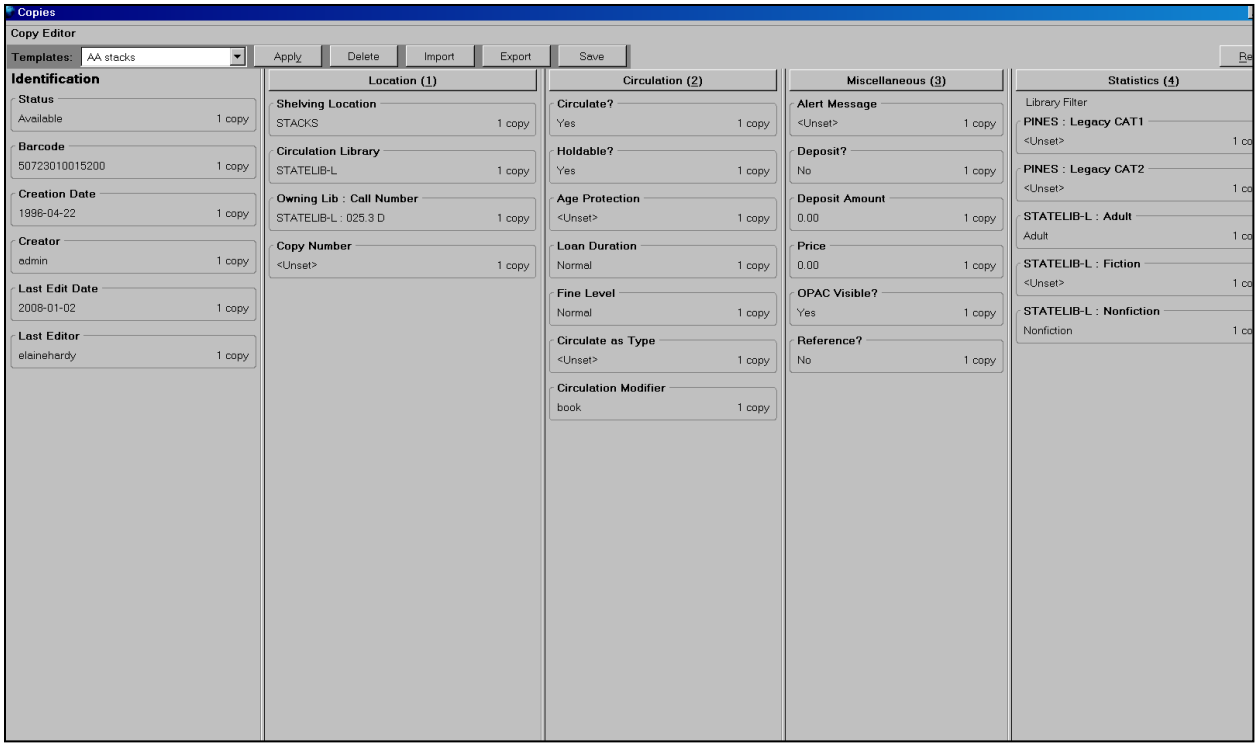
Before you begin adding or editing volumes and copies, it is a good idea to become familiar with the columns and fields of the volume/copy creator. To access this interface, from the **Holdings Maintenance** view of a record, highlight a copy in your library and either right-click to access the **Actions for Selected Rows** menu (**ALT F**) to add volumes and copies:



Or, click on the **Actions for Selected Rows** menu on the middle right of the screen, above the holdings area:



The **copy editor** interface will open:



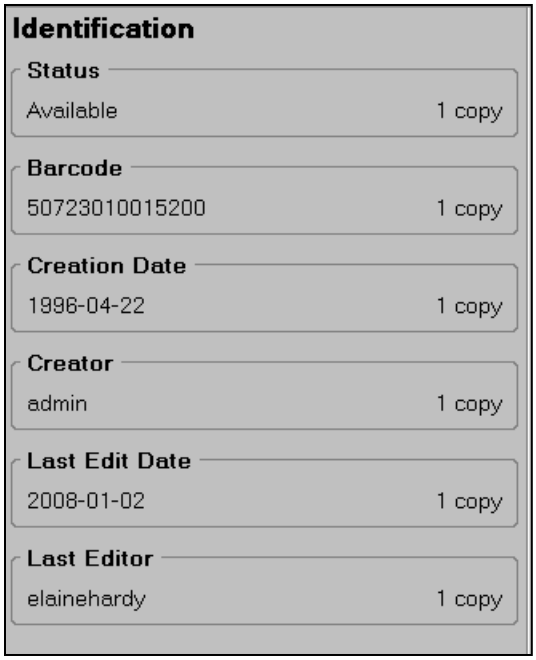
At the top of the box is the template area. From here you can apply, delete, import, export or save templates (this process is covered in a subsequent section of this chapter):

To navigate between the fields in the **Copy Editor**, click on the field you wish to edit to activate it, or you can use the **TAB** key to move between fields. Press **Enter** to activate the current field when tabbing. To jump from one column to another, press **ALT 1, 2, 3, or 4.**

There are five columns in the **copy editor**: identification, location, circulation, miscellaneous, and statistics. Since the identification column contains primarily system supplied fields that are not editable, it is not included in the numbering that allows the keyboard commands to jump between columns.

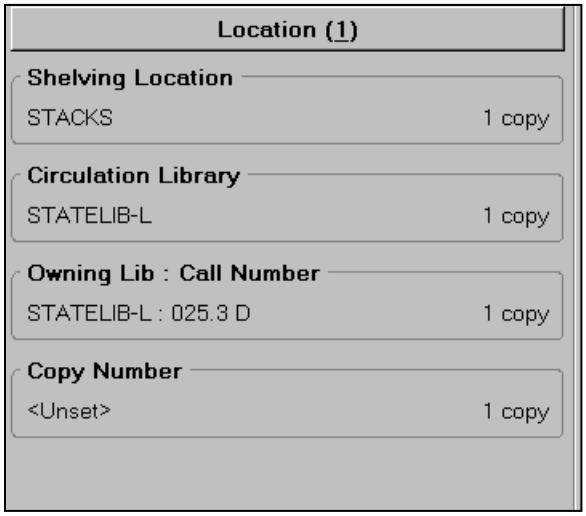
4.1 Identification Column

The first column is the Identification column:



Most of the fields in this column are system values and cannot be edited. Only **Status** can be changed from the **Copy Editor**. When adding new copies, the **Status** column does not appear. Creation date, creator, last edit date, and the last editor are blank when adding new copies. These fields are not editable and will be populated automatically by the system when the copy is created.

4.2 Location Column (column 1)



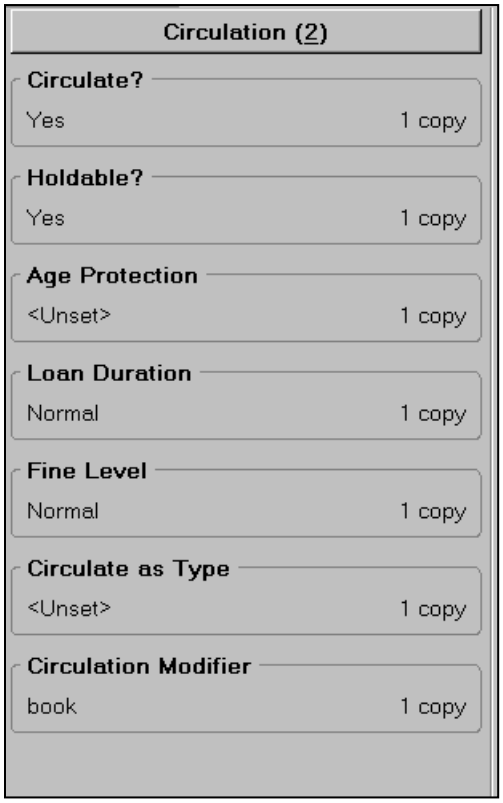
The **location** column identifies the library, shelving location (or collection), and the copy number for the item. The shelving location is defined and created by each library. Your local system administrator can assist you in creating shelving locations. As for any field, after you have chosen the value for the attribute from the drop-down list, click **Apply** or (**ALT A)**. If you do not click apply the changed value will not be applied to your item.

Circulation Library is automatically set to the library branch you choose when you are adding the volume. It can be changed in the **copy editor**.

Owning Lib : Call Number is set to the call number you assigned in the **Volume Editor**. It cannot be changed in the **Copy Editor**.

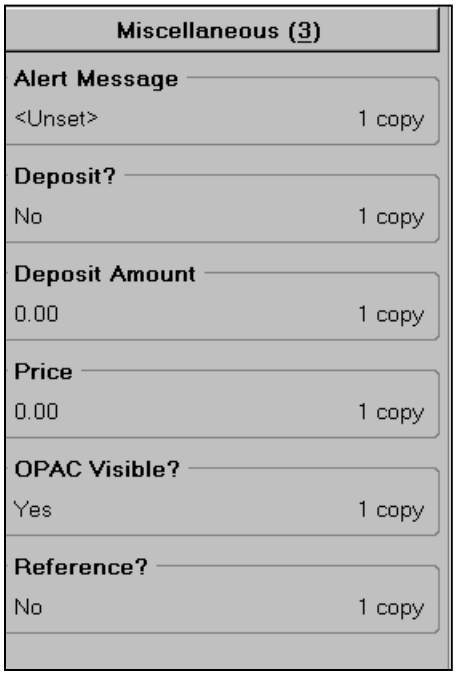
You may assign a **Copy Number**, if desired. This will apply the same number you set to all copies you are editing. It will not enumerate the items. When adding new copies, you will need to edit the copy numbers for each copy individually.

4.3 Circulation Column (column 2)



The **circulation** column controls how the item's circulation policies function. The default selection for **Circulate?** and **Holdable?** is Yes. The default value for **Age Protection** is unset. Age protection prevents holds from patrons outside of your branch or system. While the item is automatically removed from age protection after the set time period, the value remains in the item attributes. The default selection for **Loan Duration** and **Fine Level** is normal. Your library will define these values within the PINES circulation policy. It is not necessary to set **Circulate as Type**, since this is only used if the item is to circulate according to the rules of another type of item (For example, a book accompanied by a sound recording would have the item type "a" for language material; however, your library may circulate this under "o" for kits). You can set it to the type of item you are circulating, depending on local procedures. The **Circulate Modifier** can be set for the type of item in hand.

4.4 Miscellaneous Column (column 3)



The **miscellaneous** column contains an eclectic mix of attributes. An **Alert Message** stops the circulation process and requires the user to acknowledge the message to proceed. Typical messages include the number of individual CDs in an audiobook, accompanying book or other material. The presence of an alert message stops both check out and check in so that staff can verify the message.

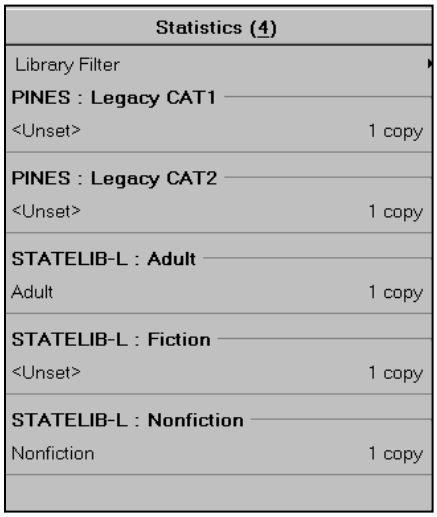
The default setting for **Deposit** is **No**. It may be changed for those items your library requires a deposit to check out. If deposit is set to **Yes**, you should also set the **Deposit Amount**.

To set the **Price,** enter the number, and click apply. The system does not accept the $ character. If your price does not include cents, the system will add .00 automatically.

The default for **OPAC Visible**? is yes. This may be changed if applicable.

The default for **Reference?** is no. This may be changed if applicable.

4.4 Statistics Column (column 4)

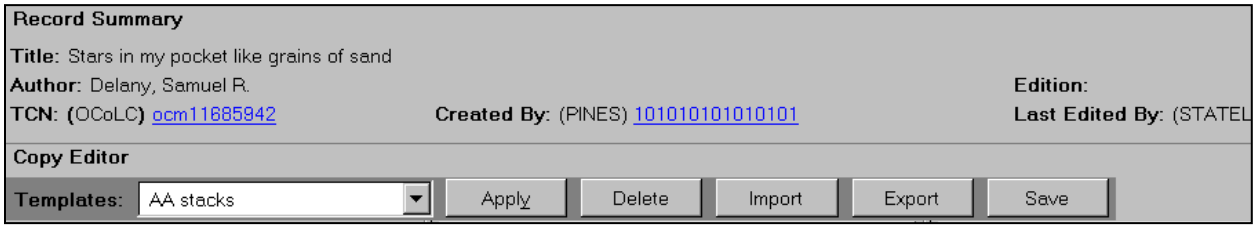


The categories in the **Statistics** column are defined by each library. You may set them as required by your library policies for statistics. Reports may be used to retrieve data about these fields for statistical purposes.

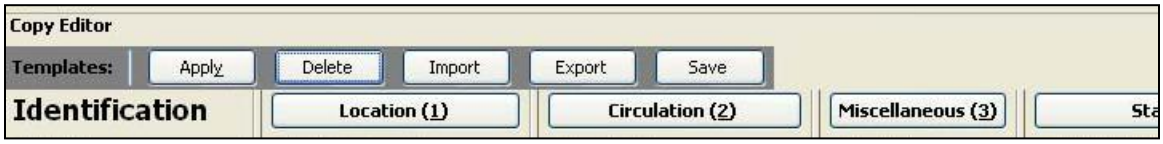
Chapter 5 Using templates in the item attribute editor

5.1 Creating templates

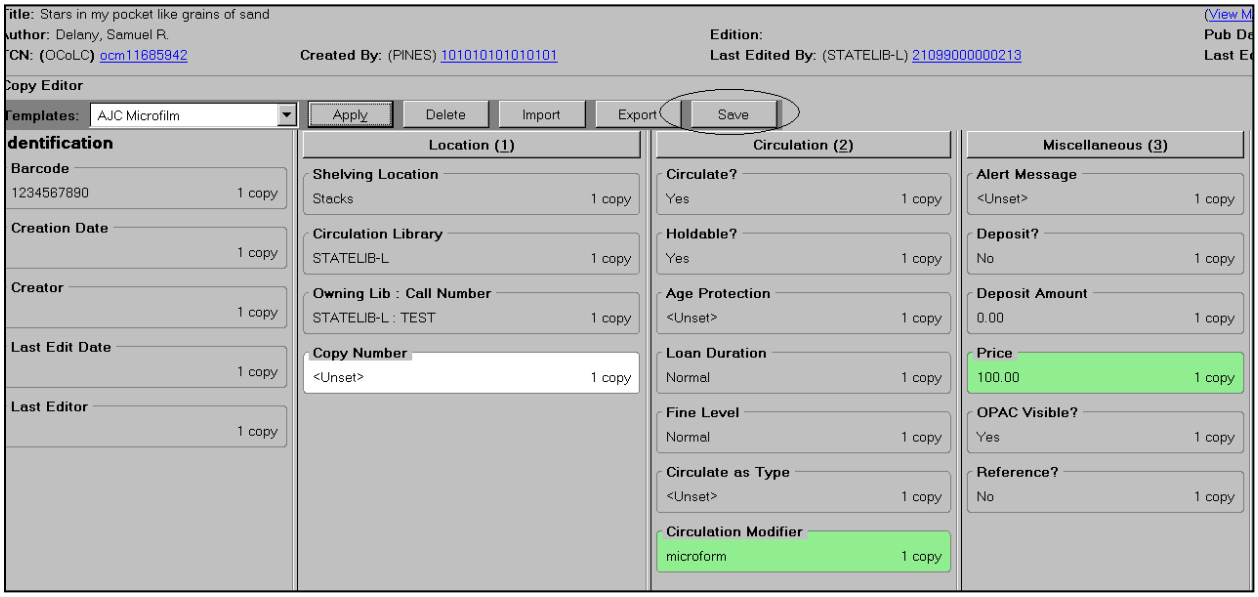
Since catalogers often apply the same attributes to the same types of items, templates can be used in the **Item Attribute Editor** to speed copy cataloging and minimize errors on copy records. Templates are added and applied in the **Item Attribute** or **Copy Editor** under **Holdings Maintenance** (see section above on how to access the **copy editor**).



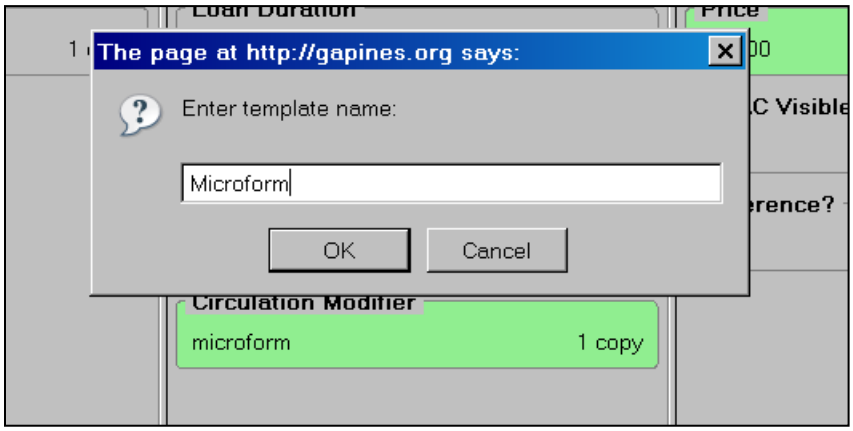
If you have not yet created templates, there will be no drop-down box:



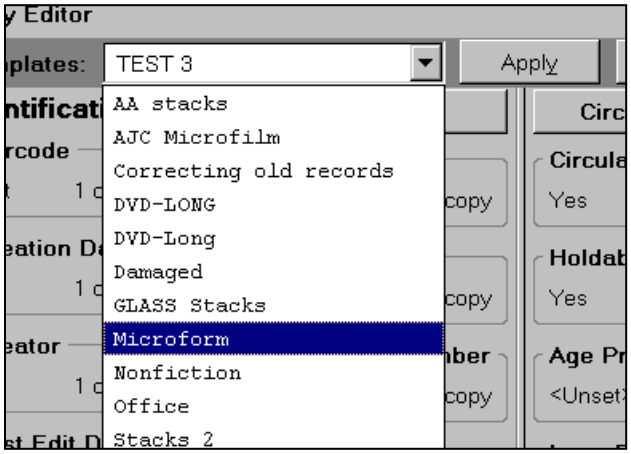
To create a template, select, and apply values for each attribute you want to include. As you edit the attributes, they will be highlighted in green. Click on the **Save** button at the **Template** line:



You will be prompted to name your template. Best practice is to choose a name that describes what the template does (Young Adult, Gardening Collection, Reference, for example):

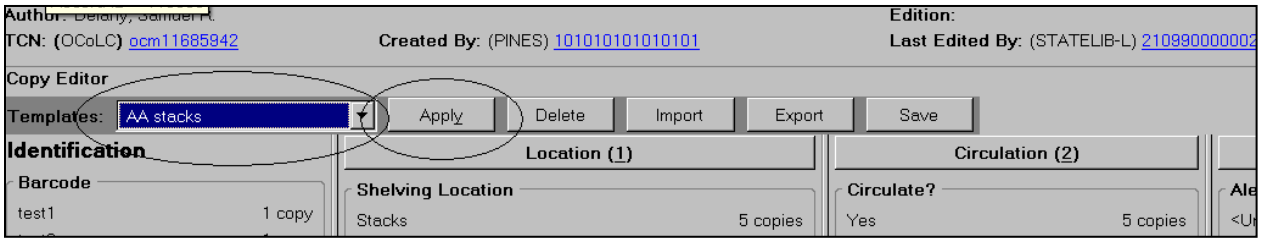


Your newly created template is immediately added to the drop-down menu:

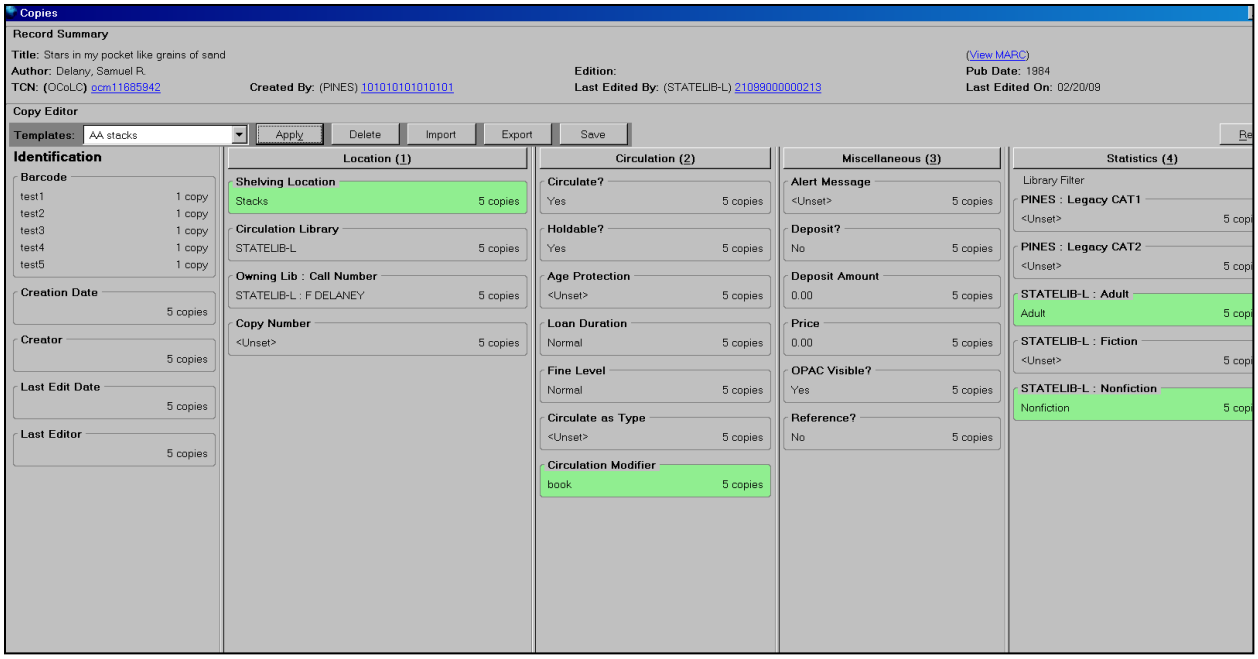


5.2 Applying templates

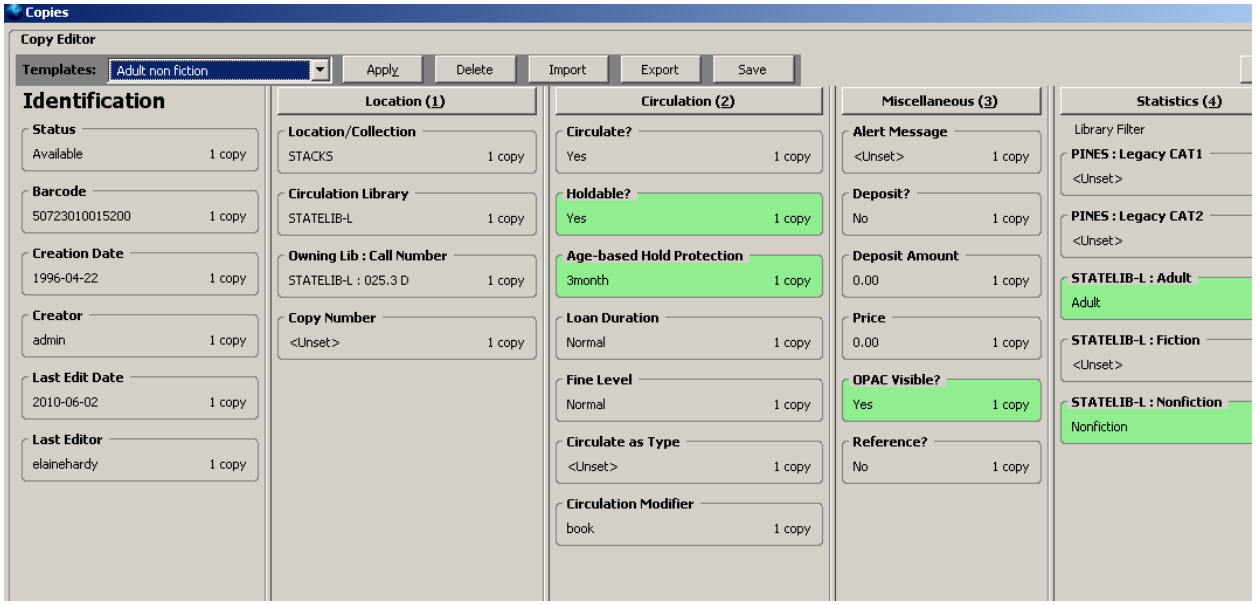
Once you have created your templates, you can apply them to any copy on any title record. From the **Copy Editor** screen, choose the desired template from the drop-down menu and click on **APPLY** (**ALT Y**).



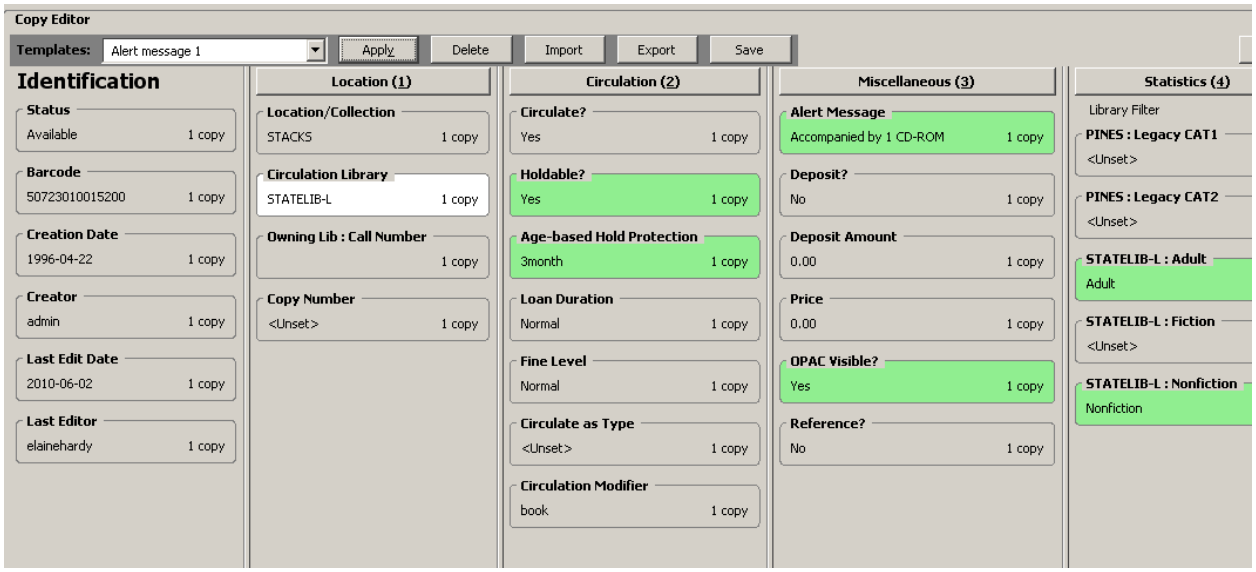
The fields edited by that template will be highlighted in green:



You can apply more than one template to an item if needed. For example, you can apply a template for the adult nonfiction collection:



And then one for an alert message for a book that is accompanied by a CD-ROM:



Once you have applied your templates, make any additional changes to the attributes and then click on the **Create Copies** (**ALT M**) button (For more information on creating copies see the chapter : **Holdings Maintenance**: adding volume and copies).

5.3 Editing templates

You can edit an existing template. First, apply the template to a copy in the **Copy Editor**. Make the necessary changes; click on **Save**. When prompted to name the template, use the exact same name (template names are case sensitive) as the existing template. The new template is ready for immediate use.

5.4 Using an existing template to create a new template

If you need to create a new template that has common elements with an existing template, you can use the existing template as a base. First, apply the template in the **Copy Editor** and edit the attributes. **Save** it, and when prompted for a name, use a new one, specific to that template.

5.5 Sharing templates

Rather than creating new templates from scratch for each login for your library or vendor, you can export the template file for easy sharing to another user. In the Copy Editor, click on **Export**.

You will be prompted to save your file and can do so to either your computer or an external device. You can then email the file to another user or use the external device to import it to another workstation.

After sending the file to its new location, from the **Copy Editor** for that workstation/login, click on the **Import** button:

Locate the file and click on **Open**. The file will be imported to the workstation.

Note: Some users have reported difficulty importing large files. You may need to break the large file into smaller sections and import each one separately.

5.6 Other template functions

5.6.1 Deleting a template

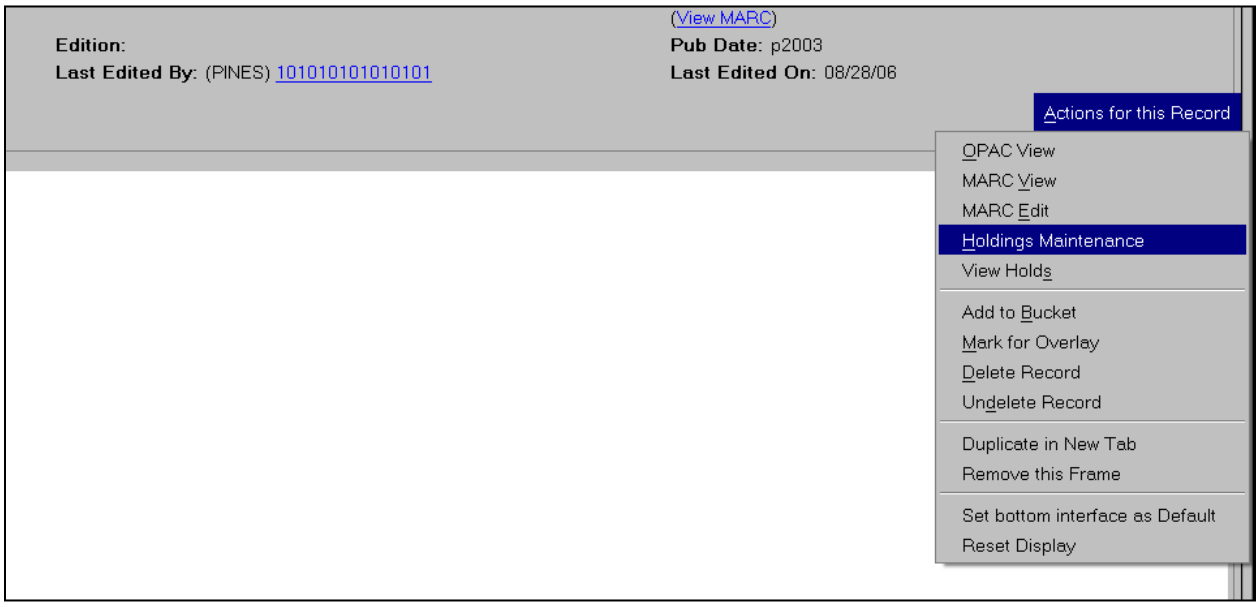
Choose the template to be deleted from the drop-down box. Then click on **Delete**.

5.6.2 Changing template names

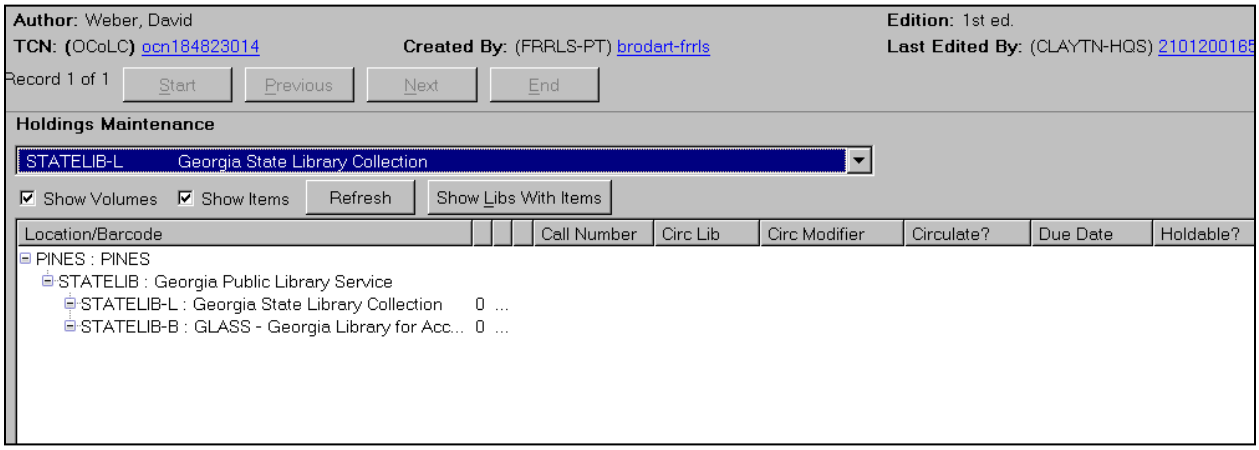
Choose the template from the drop-down box and click on **Save**. Assign the template a new name. You will then need to delete the template with the old name.

Chapter 6 Holdings Maintenance: Adding volumes and copies

After you have identified a matching record in the PINES database by following PINES matching procedures and policies, you are ready to add your library system holdings to the bibliographic record. Use the **Actions for this Record** menu located on the right hand side of the screen (**ALT R**) to switch from your default view to **Holdings Maintenance**:



The default view for the **Holdings Maintenance** screen is your workstation library's holdings. If your library is not displayed, use the drop-down menu to choose it:



From the **Holdings Maintenance** screen, you can add, edit or delete volumes and copies, transfer volumes and copies between libraries or title records, print spine labels, change barcodes, and perform other critical functions.

6.1 Adding volumes and items (copies) to one library

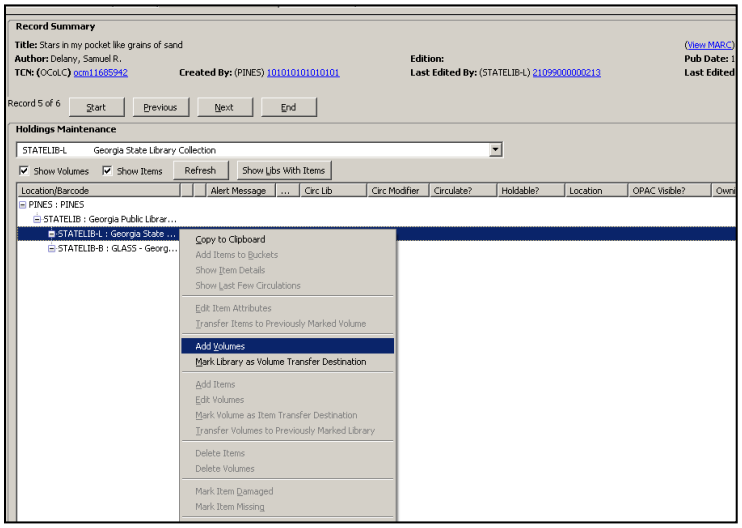
In PINES, the record hierarchy is the bibliographic/title record, then the volume/call number record – and lastly the copy/item record. See the section on Title Maintenance in this manual as well as PINES cataloging policy for information on adding, deleting and editing bibliographic records.

The volume or call number record is considered owned by the individual library and adding, deleting and editing it are primarily subject to that library's policies and procedures. Volume records are attached to bibliographic title records and consist of the owning library system and branch and the call number assigned by that library. Multiple volume records for each library branch can be attached to a single bibliographic record if needed. Multiple volume records are desired if the title is for a serial or multivolume monograph such as an encyclopedia. Libraries may be also have separate volume records for reference copies and circulating copies or for different shelving locations such as juvenile and young adult attached to a single bibliographic record. Call number pre-fixes, class numbers, cutters and suffixes are at the discretion of the owning library. It is best practice to include a suffix with part or year number identifiers for multivolume sets and serials.

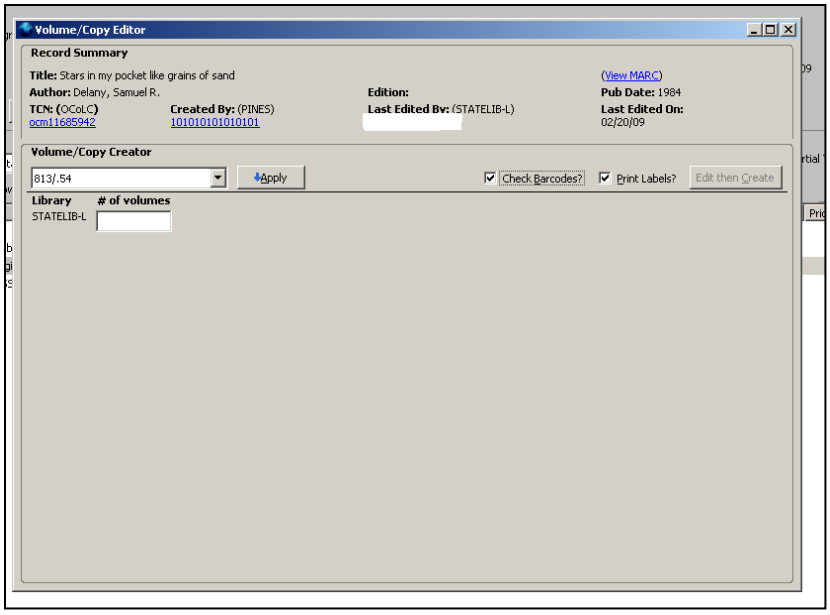
The item or copy record is the last element in the hierarchy and is attached to the volume record. Multiple copy records can be attached to a single volume record. A copy record provides the information to identify a specific copy and to control the circulation usage and describe the statistical properties of the item. As with a volume record, the item record is owned by the individual library and is primarily subject to the policies and procedures of that library. Consult PINES cataloging policies for those item elements required by PINES policies. In Evergreen, how an item circulates can be either controlled at the MARC level or it can be controlled by using circulation modifiers. Use of circulation modifiers are at the discretion of the library but are helpful in statistical reports and to ensure that the correct circulation rules are applied to the item. Circulation modifiers are decided by the PINES Executive Committee.

6.1.1 Adding one volume and one item (copy) to one library

To add new volumes: Highlight your library/branch and access the **Actions for Selected Rows menu** as described in the preceding section and choose **Add Volumes** (**CTRL V**)

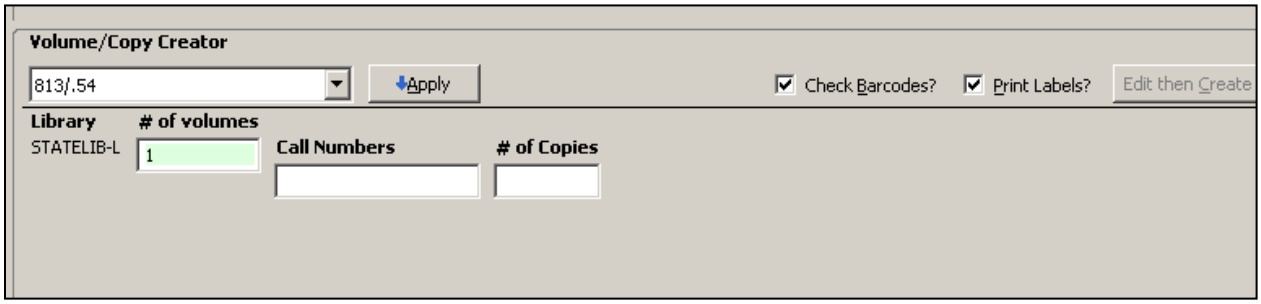


The **Volume/Copy Editor** comes up:

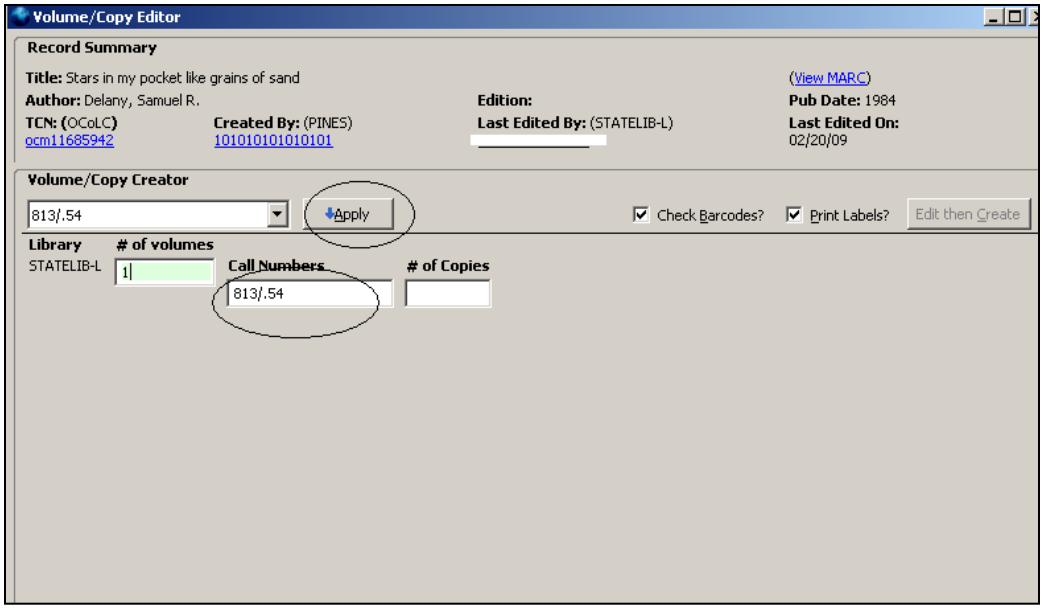


If you are using standard barcodes make sure the **Check Barcodes** box is checked so that the system will verify that your barcodes are correctly formatted. This prevents you from inputting mis-scanned barcodes. Also, if you plan on printing spine and/or pocket labels as you go, check the **Print Labels** box.

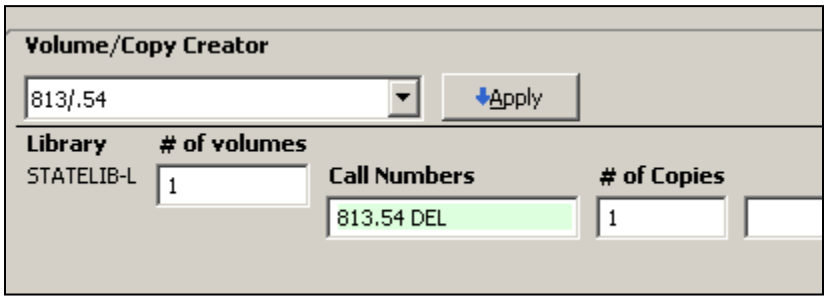
Under the **Volume/Copy Creator**, enter the number of volumes you need to add (this will usually be one unless you are adding a multi-volume set) then either press the **TAB** key or the **ENTER** key:



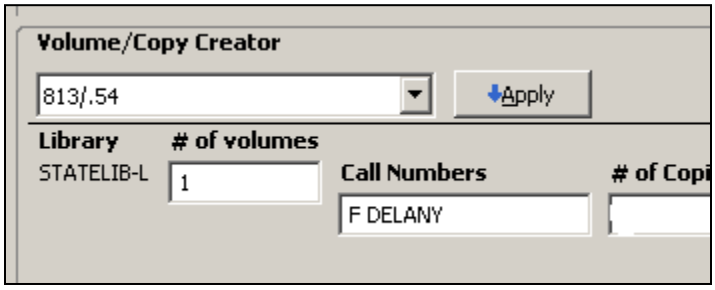
Evergreen pulls a suggested call number from the 082 in the MARC record which you can use to build your local call number. Click on the apply button and the call number will populate for the volume:



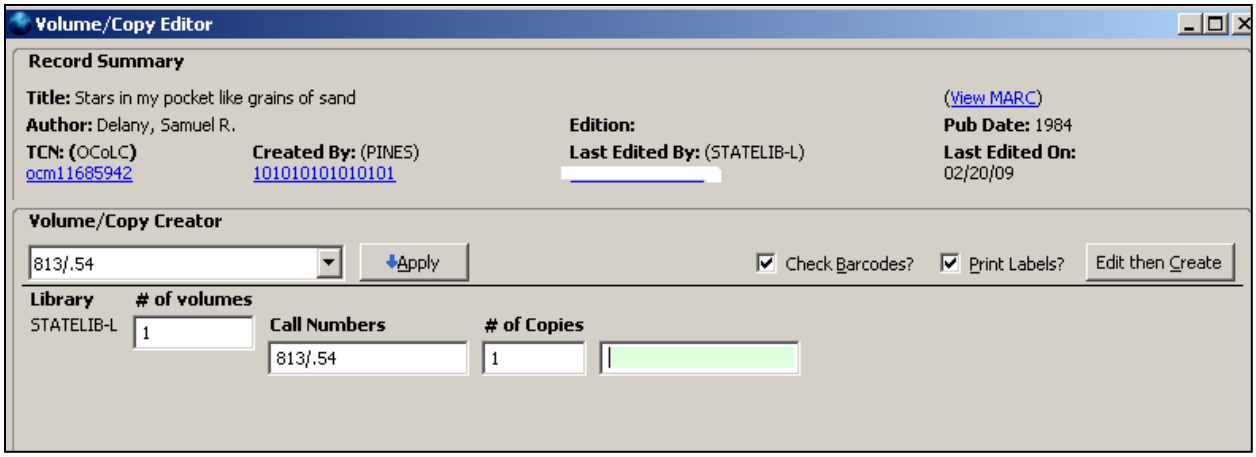
Add a cutter and delete the / or make other changes to complete your call number (best practice is to verify all call numbers, even those assigned by the Library of Congress):



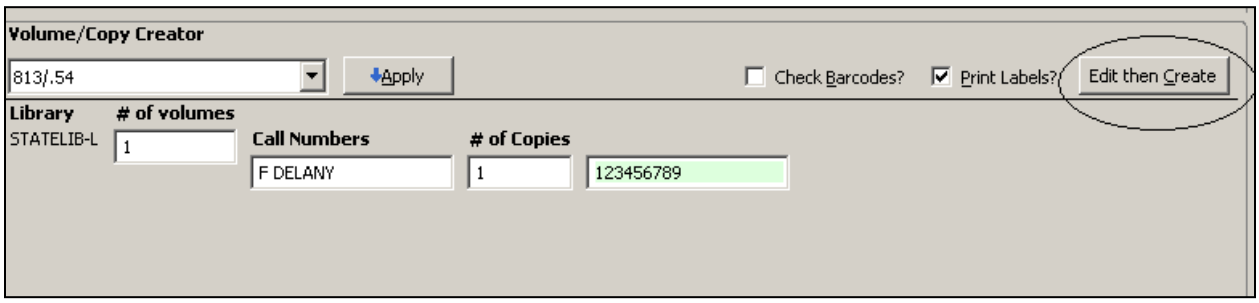
You can also enter the call number you have assigned directly in the well:



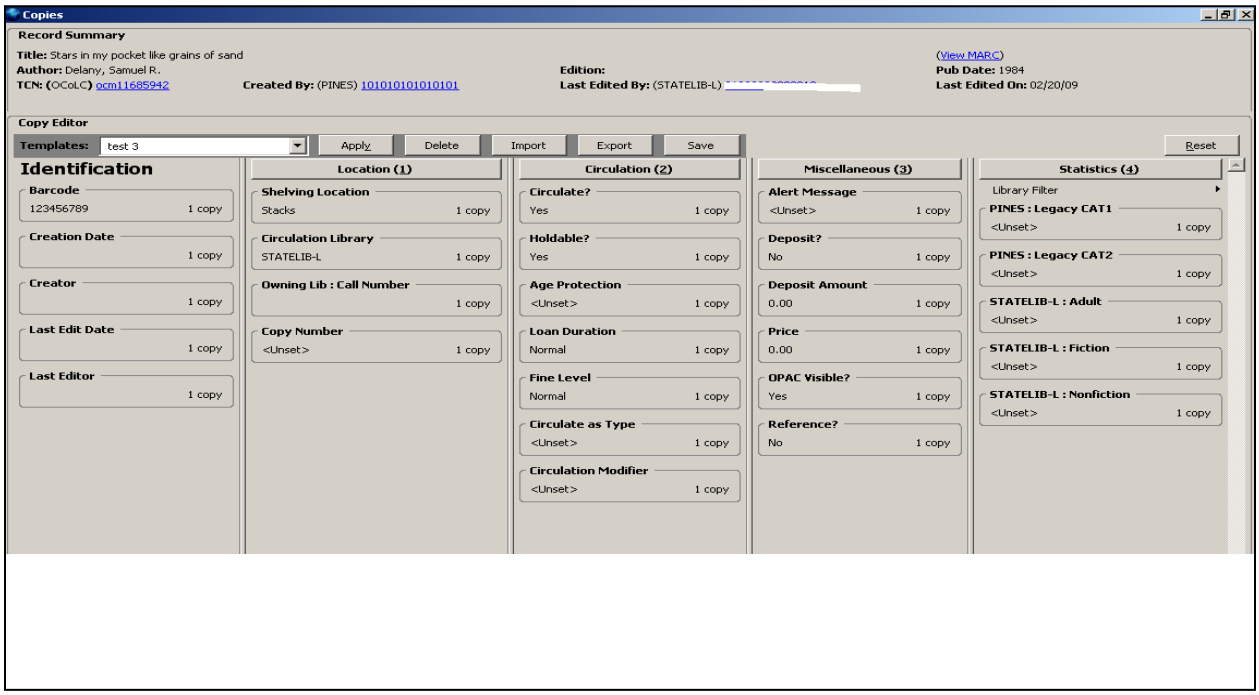
Next, enter the number of copies you have and either push the **TAB** or **ENTER** key. A data well for barcode input will appear:



Either type or scan in your barcode (scanning is recommended to reduce data entry errors) and click on the **Edit then Create** button to edit item attributes and add the copy/item to the database:

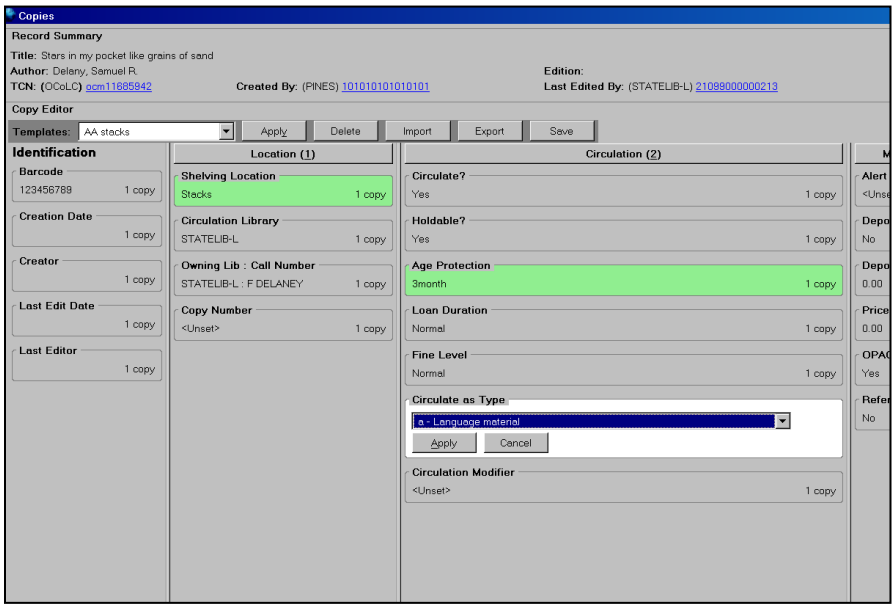


The **Copy Editor** interface will open:



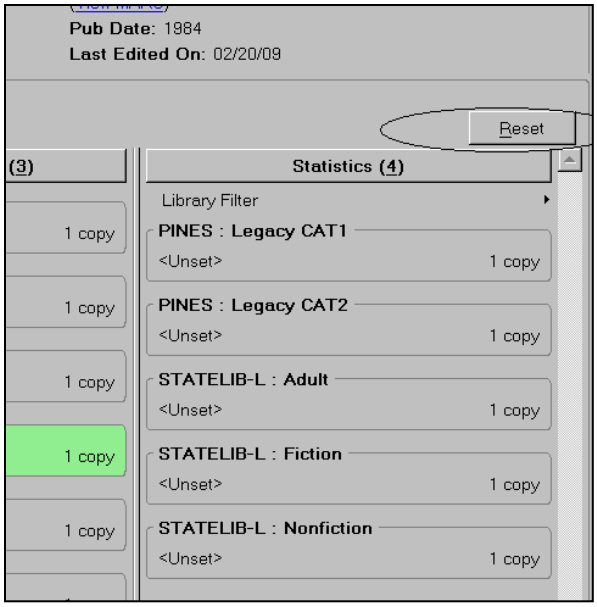
Note that the only attribute under identification filled out is the barcode. You have not created the copy/item yet. Also, shelving locations and statistical categories are local and can be created by your system.

Edit the attributes needed for the item by clicking on each field in turn. To move from field to field, press the **TAB** key or jump between columns by pressing **ALT 1, 2, 3, or 4**. When the desired field is highlighted using these keyboard short cuts, press **ENTER** to activate it. Make the necessary changes and click on the **APPLY (ALT A)** button. The field will be highlighted in green when changes are applied. **Note:** for the price, the system does not accept the $ character and, if you do not enter decimal points and cents, it will add .00 to the field.



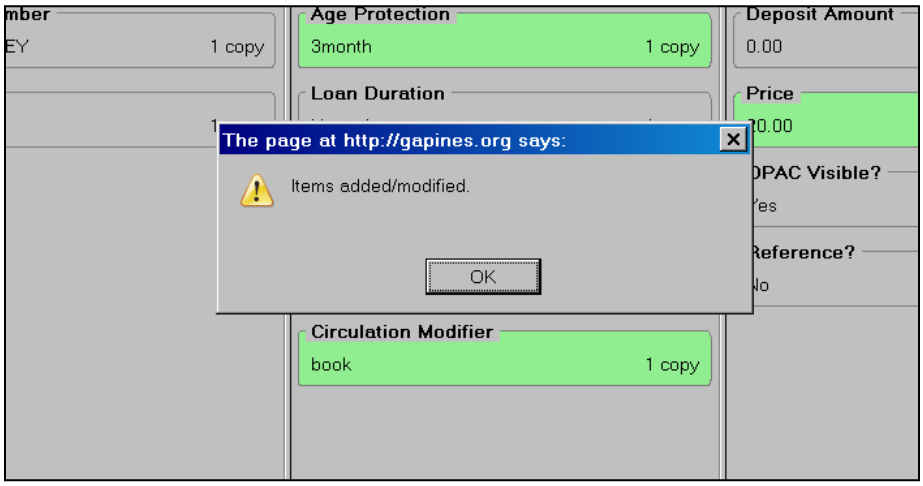
Rather than edit each attribute at a time, you can apply your templates at this point, make any other changes specific to your copies, and then proceed.

You can return the attributes back to the default settings by clicking on **RESET**

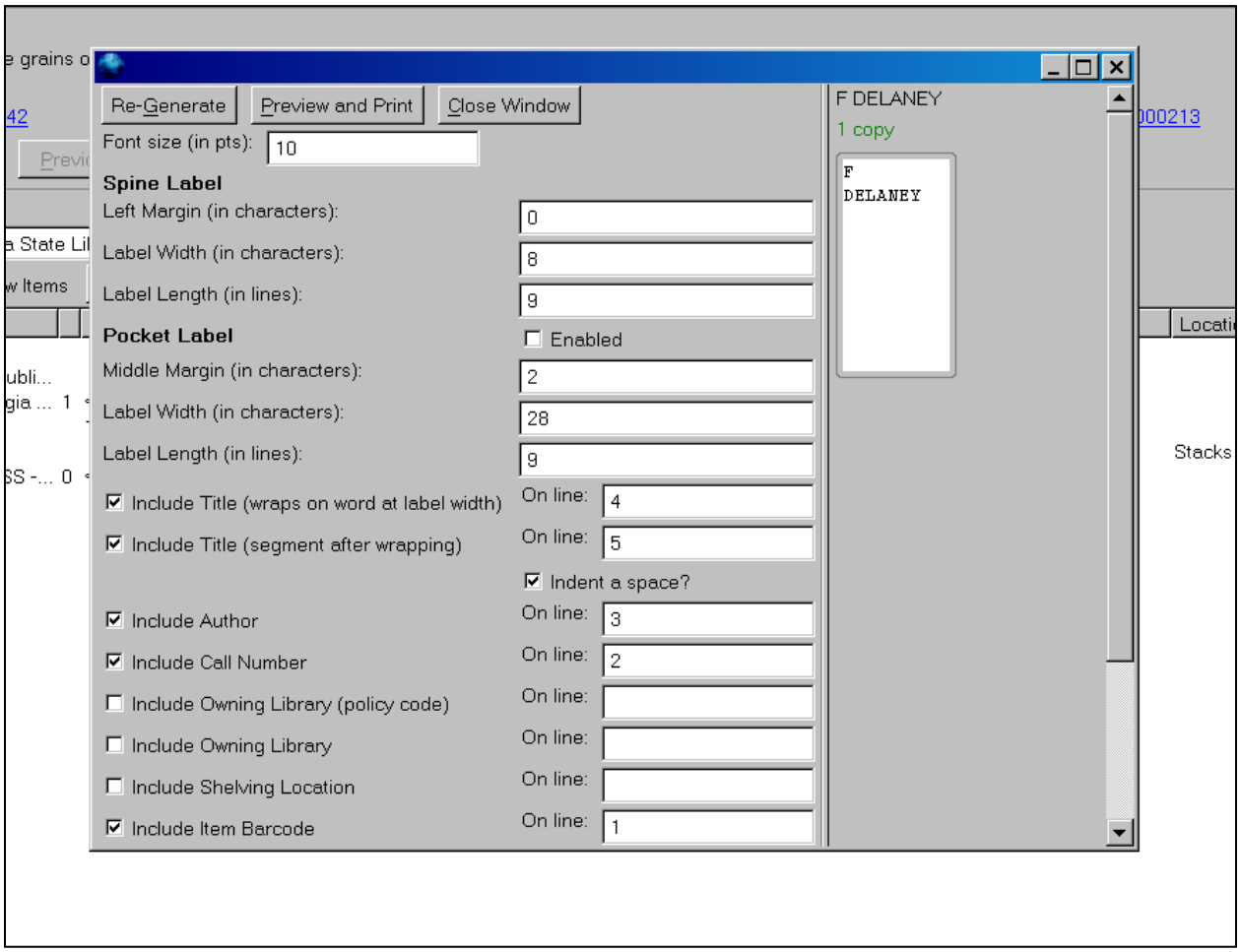


When you are finished editing attributes, it is now time to create the copy. Click on the **Create Copies** button (**ALT M**) at the bottom right of the copy editor screen

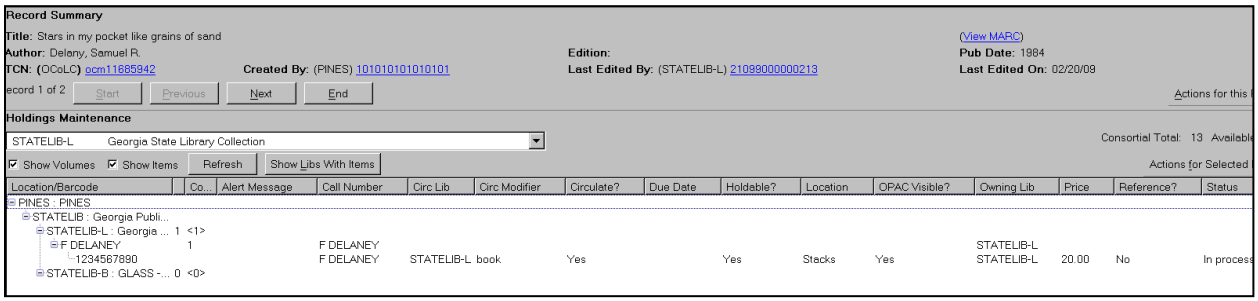
The system will acknowledge the completion of the task with a dialog box you must accept to proceed to the next step.



If you have checked the box to print spine labels the interface for that function will appear. (See the chapter Spine and Pocket Label Printing for Dot Matrix Printers for further instructions)

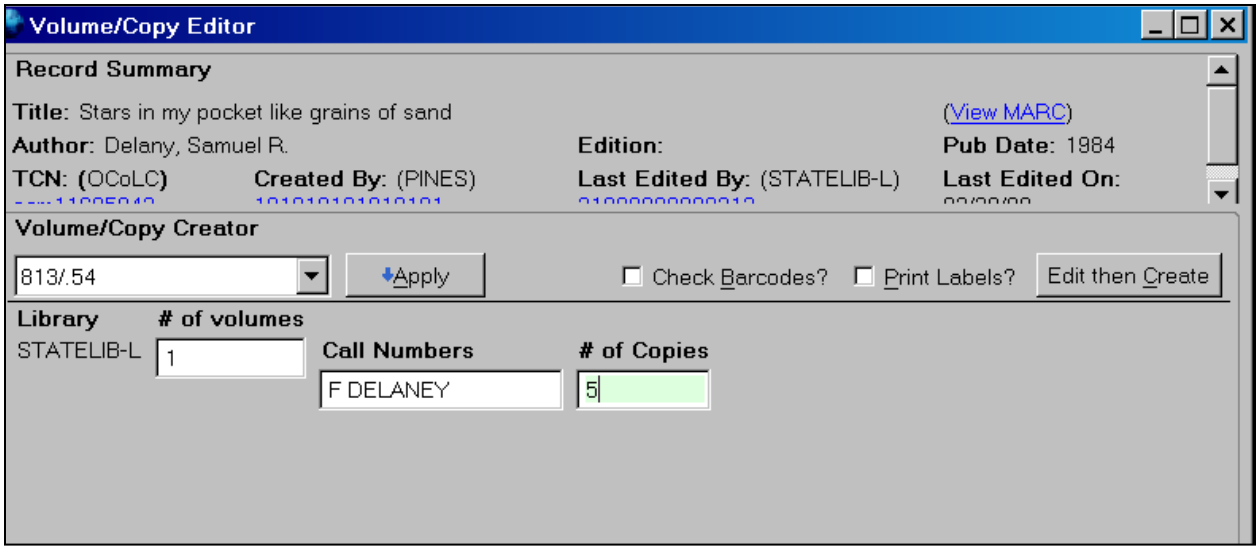


The system will redisplay your **Holdings Maintenance** screen with the newly added copy

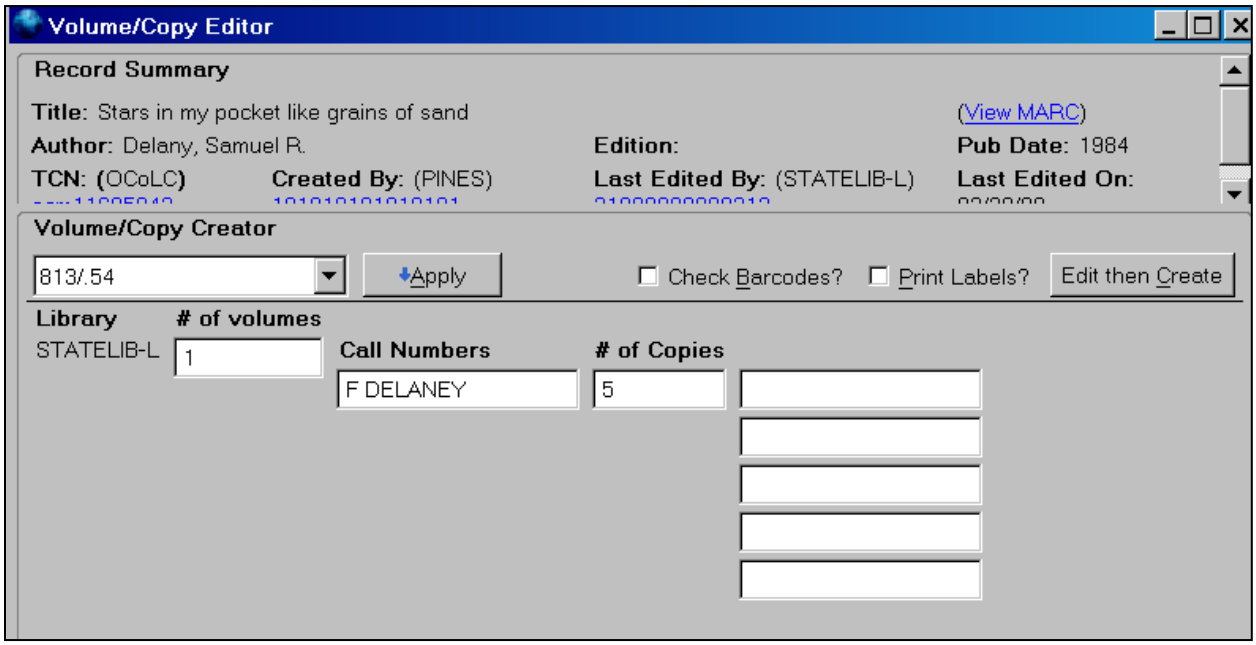


6.1.2 Adding single volume with multiple copies to one library

You can easily add multiple copies to the same volume/call number for your library. Follow the directions above to add a volume/call number and when the **Volume/Copy Editor** comes up, input the number of copies you have in the **# of Copies** box:

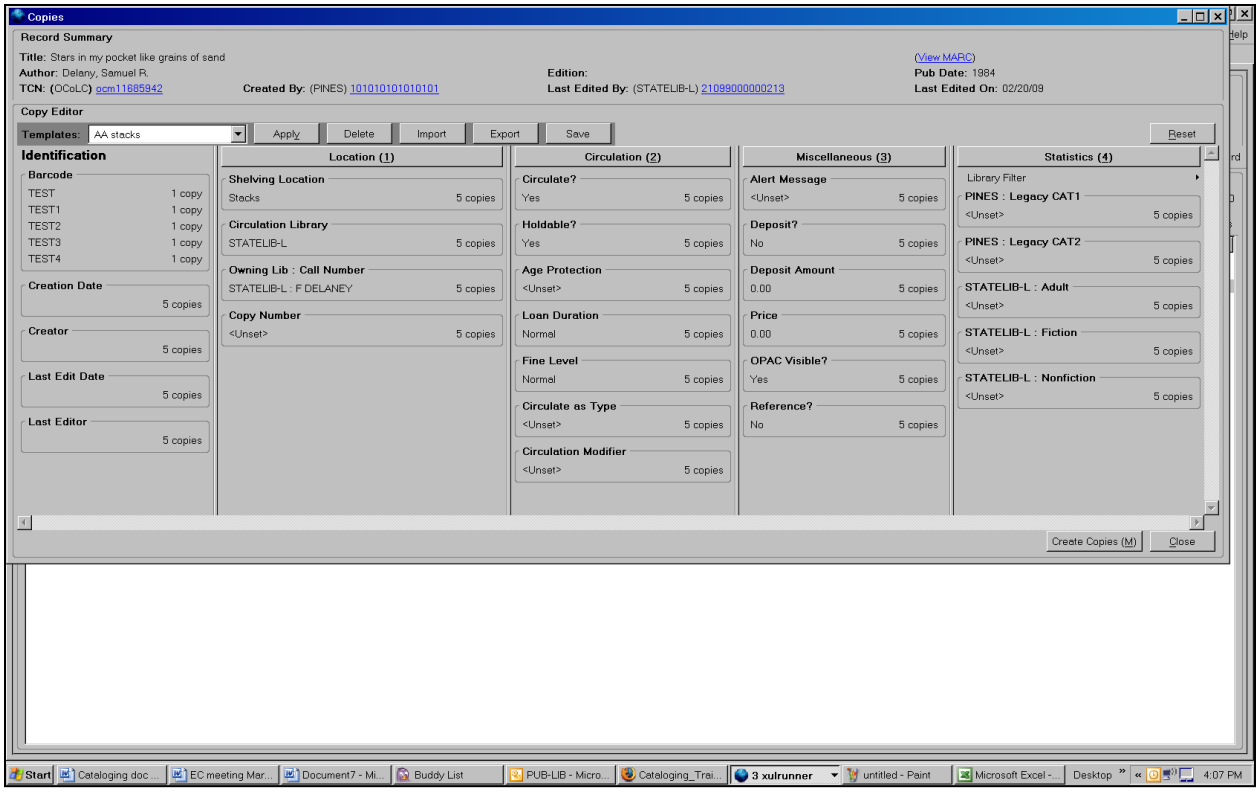


Click on **TAB** or **ENTER** for the barcode wells:

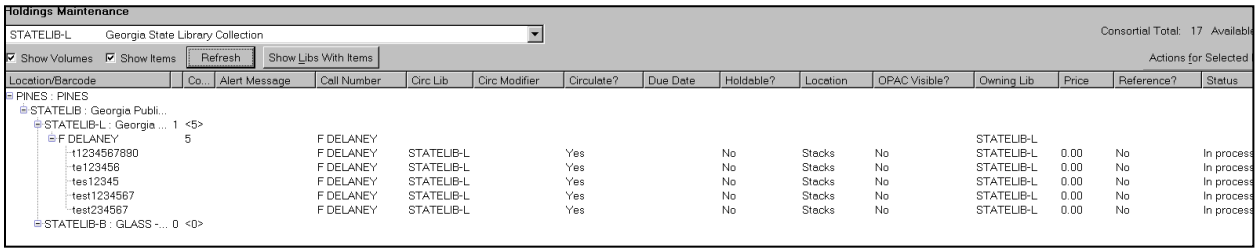


If you input an incorrect number of copies, you can change the number and then click on **TAB** or **ENTER** again, even after you have scanned in the barcodes, and the newly input number of barcode wells will appear.

Scan in your barcodes and click on **Edit then Create** (**ALT C**) button:

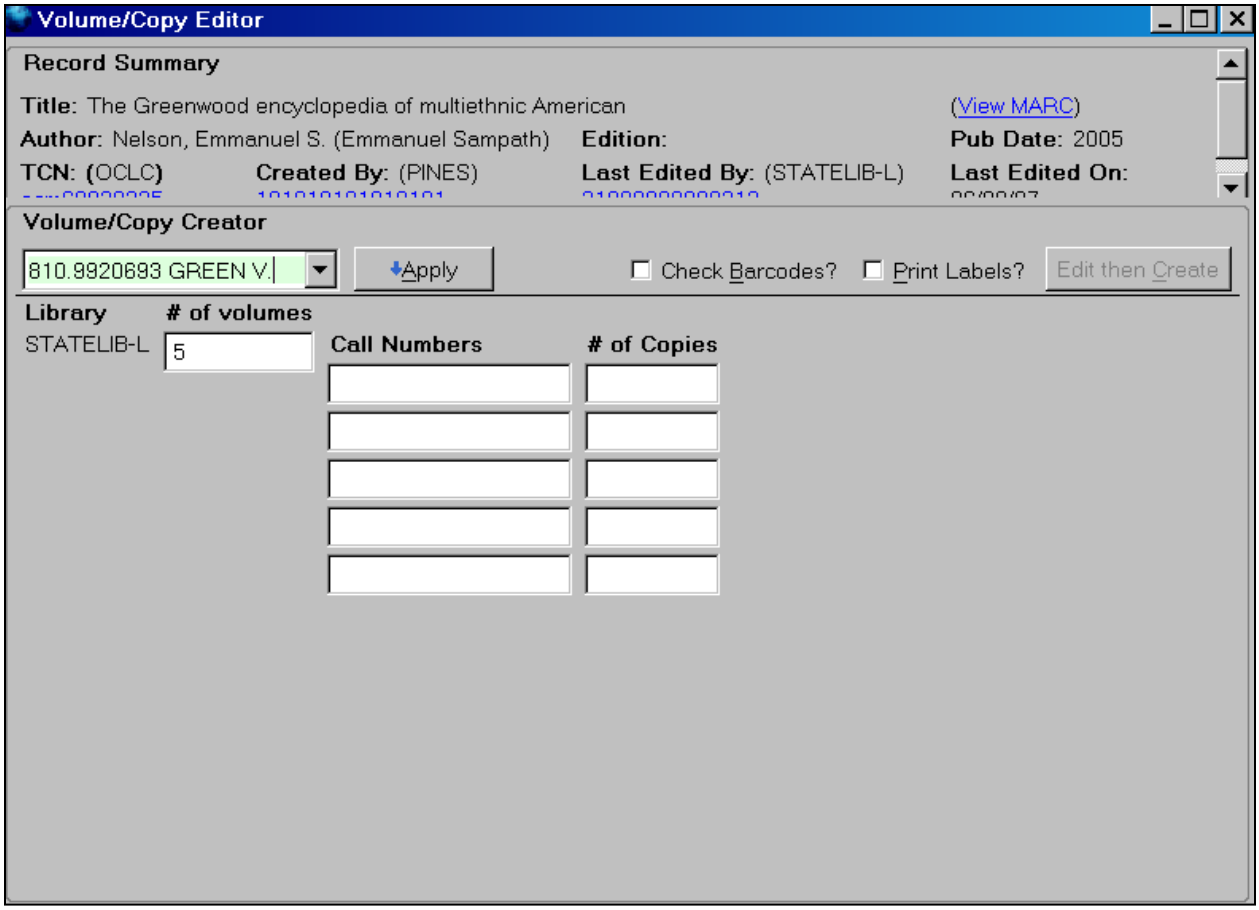


You can apply templates and make any other changes to the item attributes from the copy editor. These changes will apply to all the copies. After you are finished, click on “create copies” (**ALT M**) to create the copies. You can then make any copy-specific changes necessary (such as adding copy notes) by clicking on the specific copy and opening the **Item Attribute Editor** again.

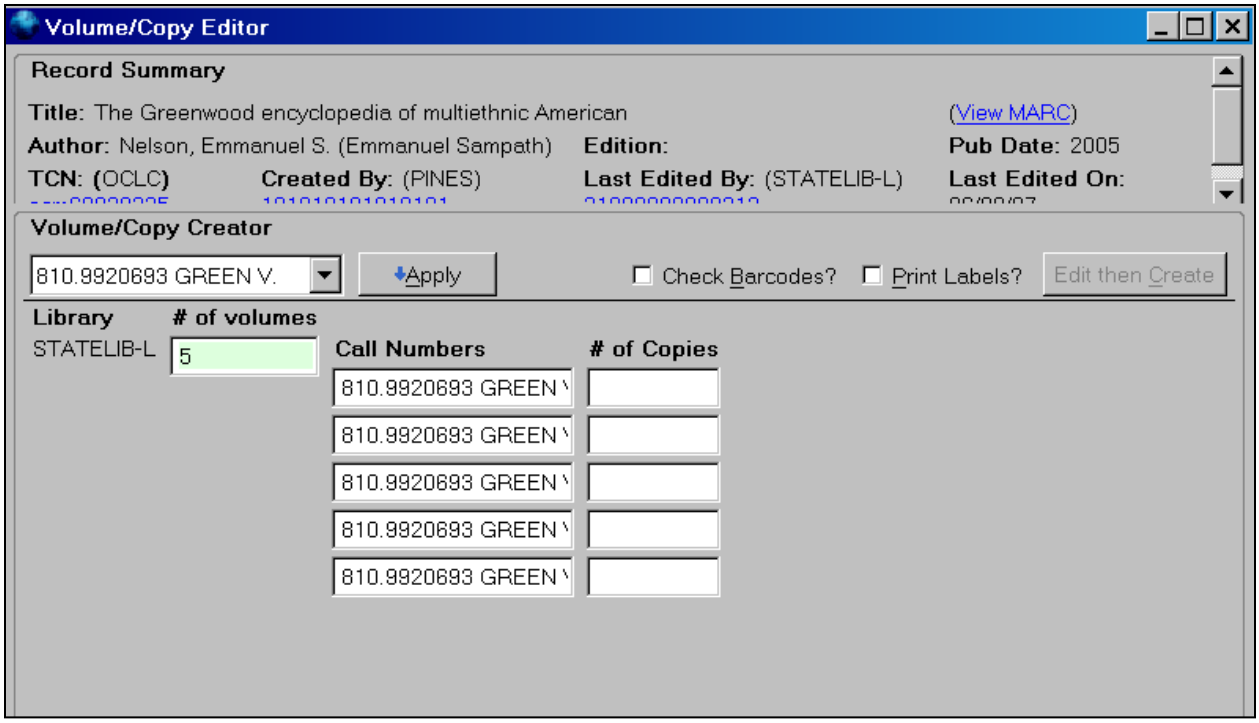


6.1.3 Adding multiple volumes with single or multiple copies to one library

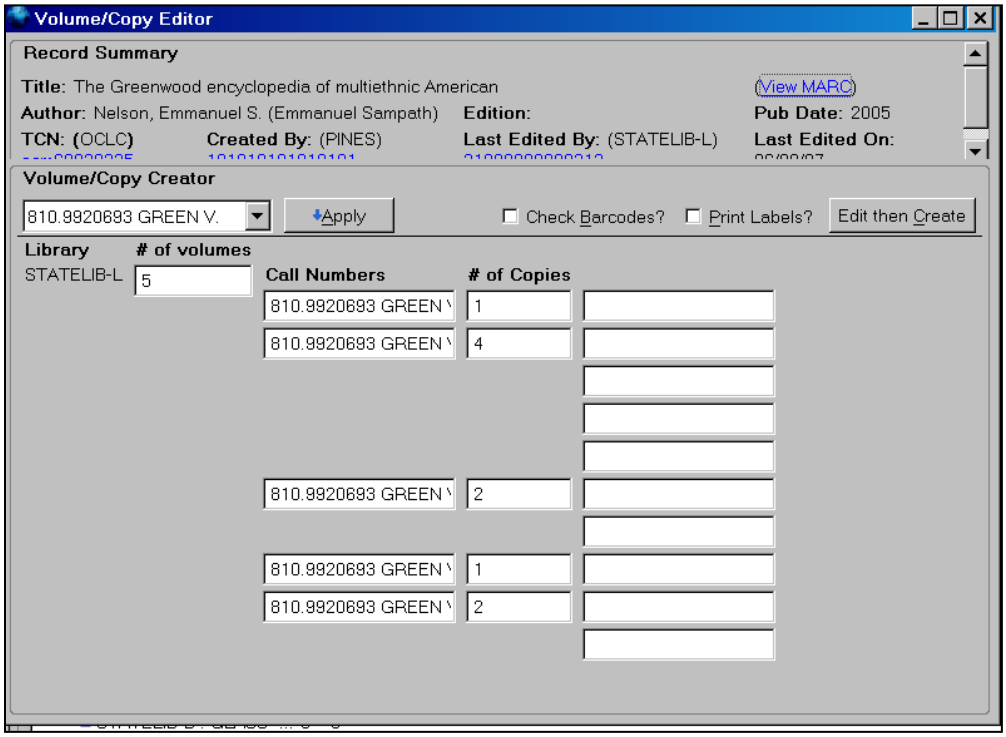
You can also easily add multiple volumes with either single copies or multiple copies to your library. From the **Holdings Maintenance** screen, using the **Actions for Selected Rows** menu, click on add volumes. From the **Volume/Copy Creator**, input the number of volumes you need to add and click on **TAB** or **ENTER**.



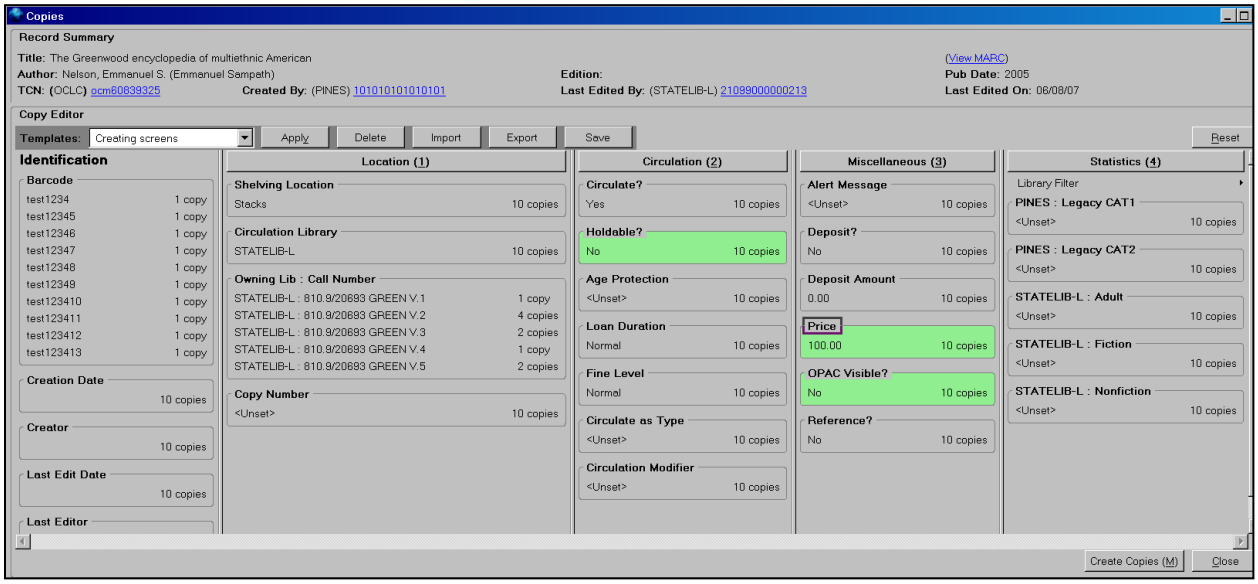
You can edit the suggested call number before you apply to multiple volumes. Edit the call number in the call number well to your assigned number. When you click on apply, the call number you entered into the well will be applied to all volumes. If you input the incorrect number of volumes, edit the number to the correct, and then click on apply, **ENTER** or **TAB.** New call number wells will be generated.



Next add the number of copies for each volume. As you add the number of copies, you can also complete any call numbers, adding volume numbers, for example. Using the TAB key navigates your cursor to the call number entry wells and then to the **# of Copies** box. If you are not editing call numbers as you add numbers, as you click down to each **# of copies** well, the data wells for the barcodes will appear. After inputting the last number, click on **TAB** or **ENTER** for the last data wells.



Scan in the barcodes and click on **Edit then Create** (**ALT C**). Apply any templates you are using and make any necessary changes to the item attributes (remember these will apply to all copies).

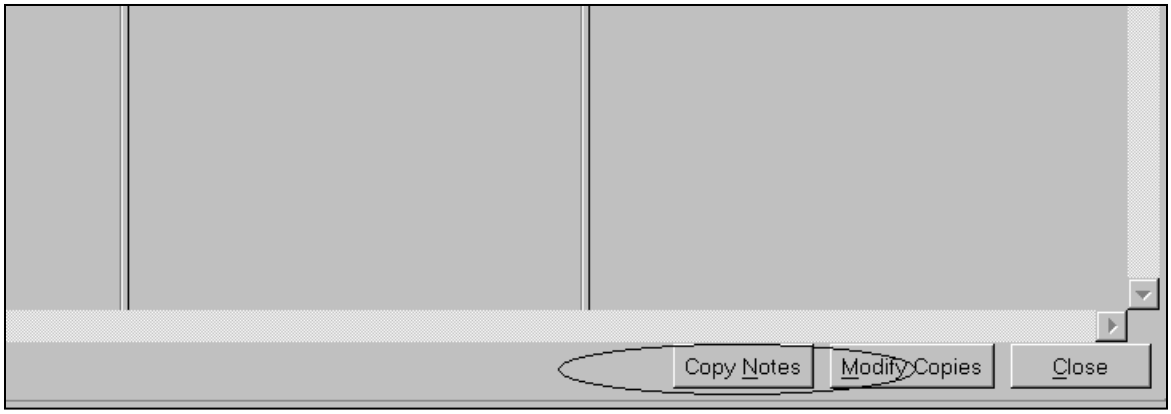


After you create the copies, you can make any edits to individual copies.

6.2 Adding and viewing copy notes

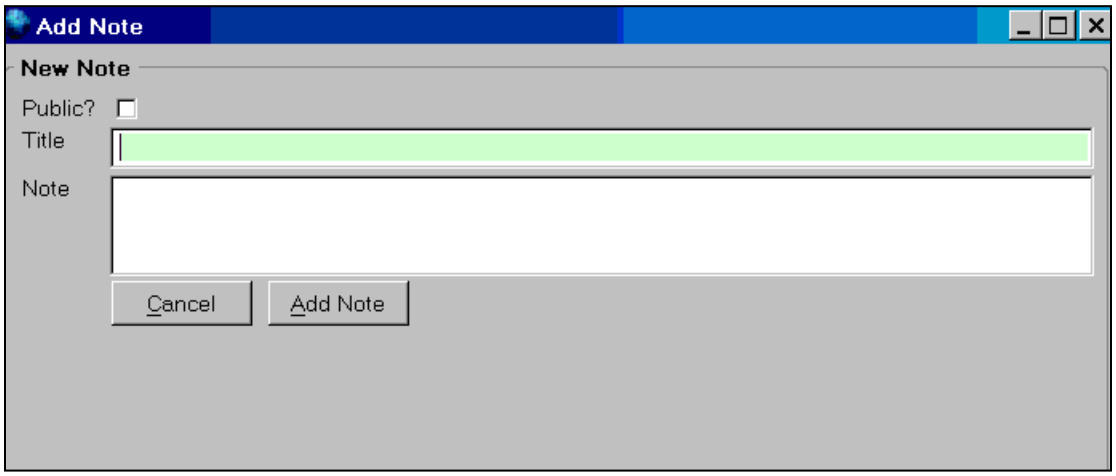
Once the items are created, you can now add **Copy Notes**, if needed. Copy notes are specific to a library and are never added to the bibliographic record in the PINES database. They are only added as **Copy Notes** attached to the specific copy/item. The addition and wording of **Copy Notes** are at the discretion and are the responsibility of the owning library. Best practice for note creation is to have agreed upon, library specific wording for consistency. For example, for items missing accompanying material, your library could choose to always use the phrase "Library copy missing accompanying material" Or the more specific "The Spouts Spring Branch copy is missing the accompanying DVD."

To add a **Copy Note**, highlight the item in the **Holdings Maintenance** screen and return to the **Edit Item Attributes** interface. Then click on the **Copy Notes** button (**ALT N**) at the bottom right of the screen. This is also the only place other than the OPAC view for OPAC visible notes to view **Copy Notes**.

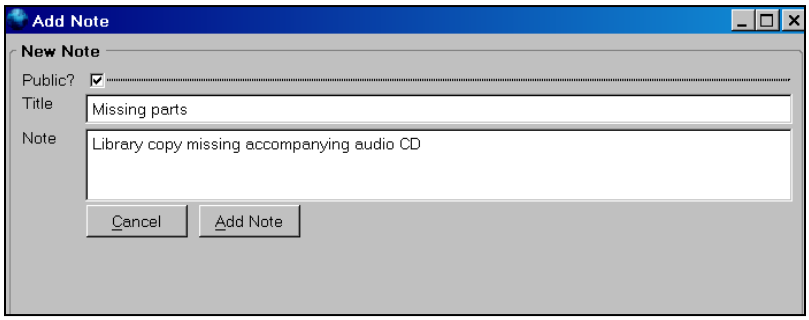


Next, click on **Add New Note** (**ALT A**)

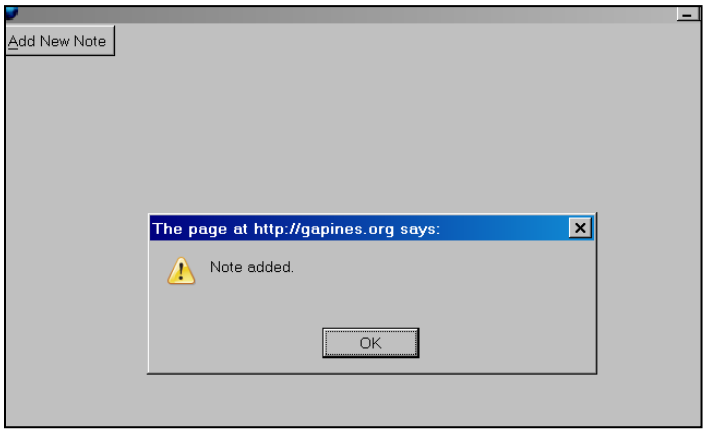
Checking the **Public?** box allows the note to be visible in the OPAC, leaving it unchecked makes the note visible only in the staff client in the edit item attributes interface.



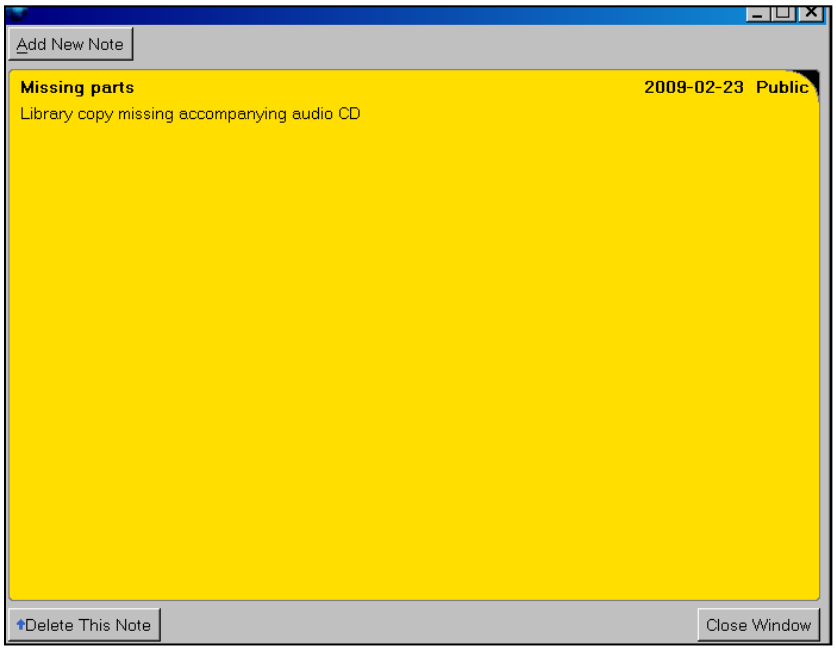
Add a title and the note itself



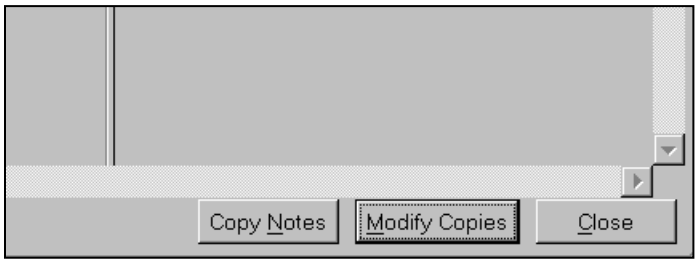
Next, click on **Add Note** (**ALT A**) to get the system acknowledgement



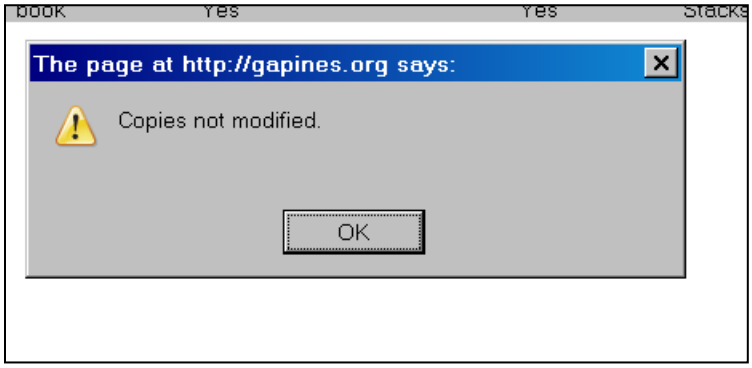
A dialog box, highlighted in yellow, with your note will appear. You can add a new note, delete this note or close the window to continue adding items. If you have made errors to the note, you will need to delete it and add it again.



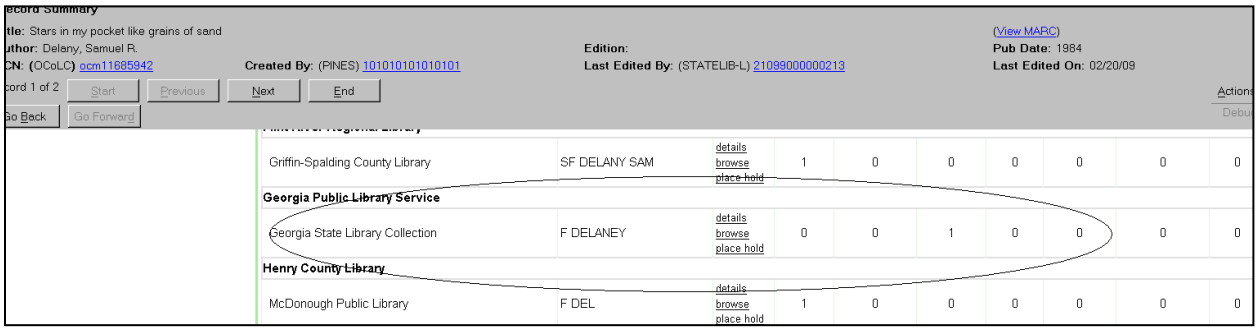
To save the note to your copy, you must click on the **Modify Copies** (**ALT M**) on the **Copy Editor** screen. Failure to do so will mean the loss of the note.



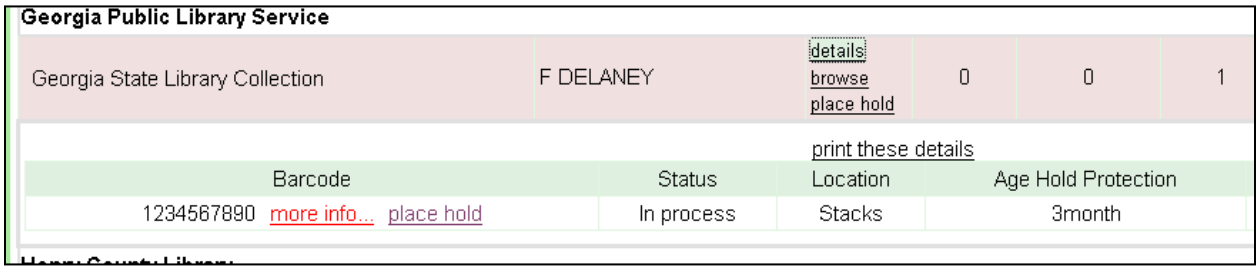
If you click **Close** (**ALT C**), the system will inform you that no modifications have been made to the copy.



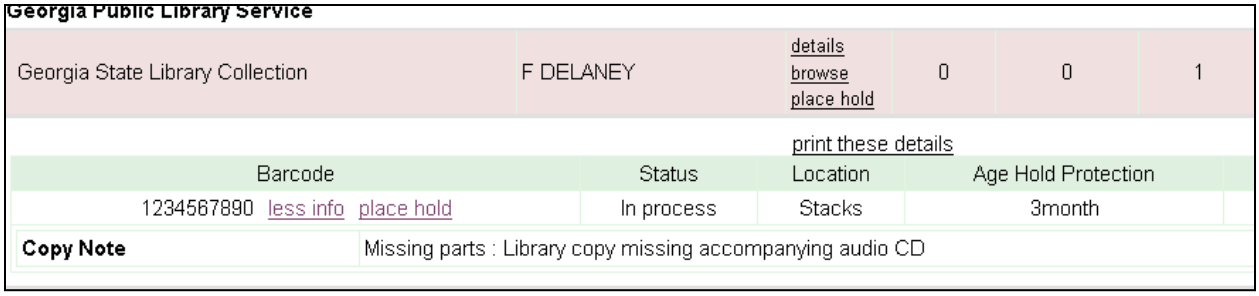
To view a public note, either return to the **Copy Editor** or go to the OPAC display for your library's copy and click on **Details**:



Then, **more info ….**



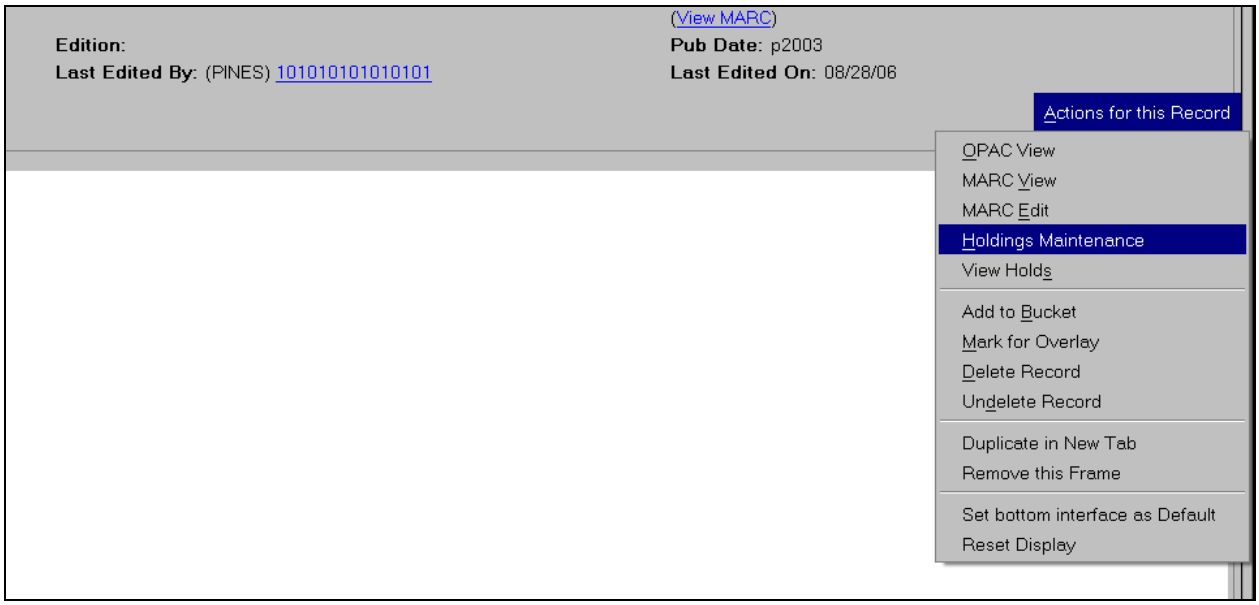
The title and text of the note will be displayed:



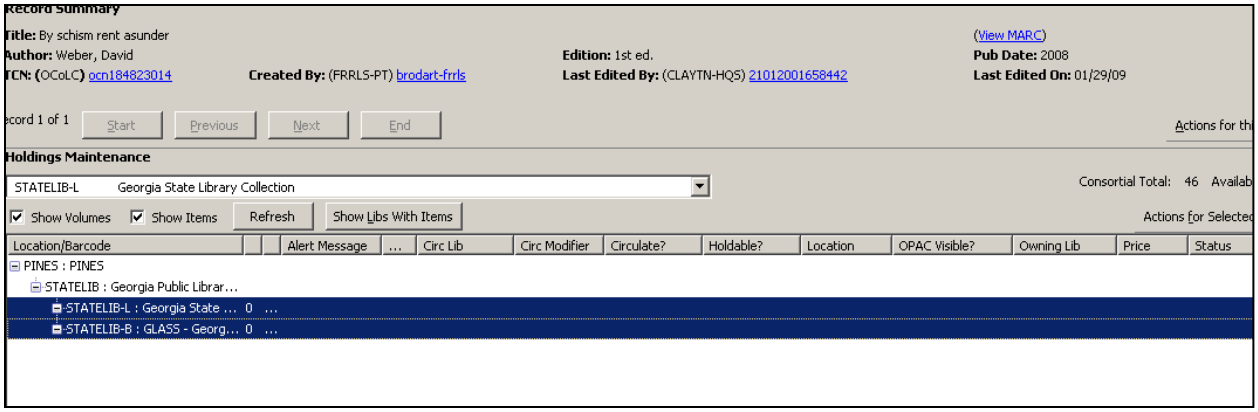
6.3 Adding volumes and copies to multiple libraries/branches

6.3.1 Adding single volumes with one copy to multiple branches

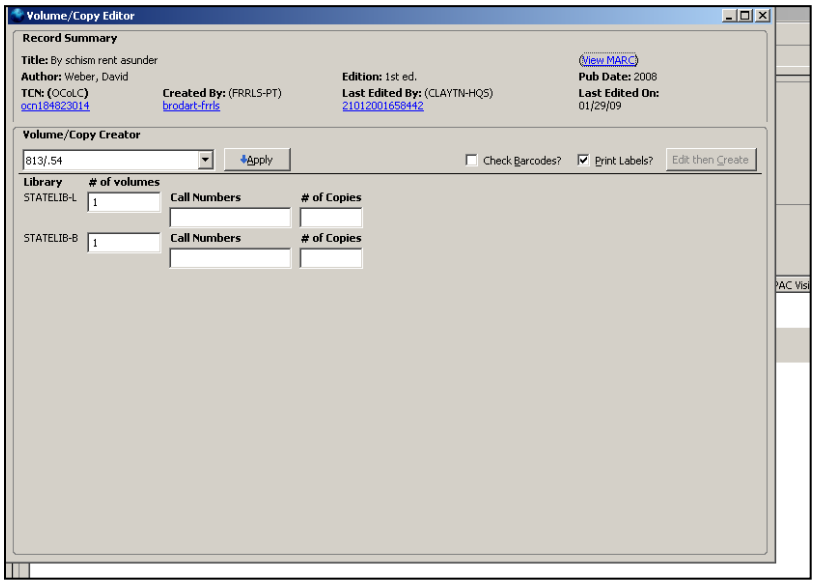
Evergreen provides an easy mechanism to add volumes and copies to multiple libraries or branches within your system at the same time if the item attributes (locations, circulation periods, etc.) are identical. Once you have identified the title record matching your item in hand, use the **Actions for this Record** menu located on the right hand side of the screen (**ALT R**) to switch from your current view to **Holdings Maintenance**:



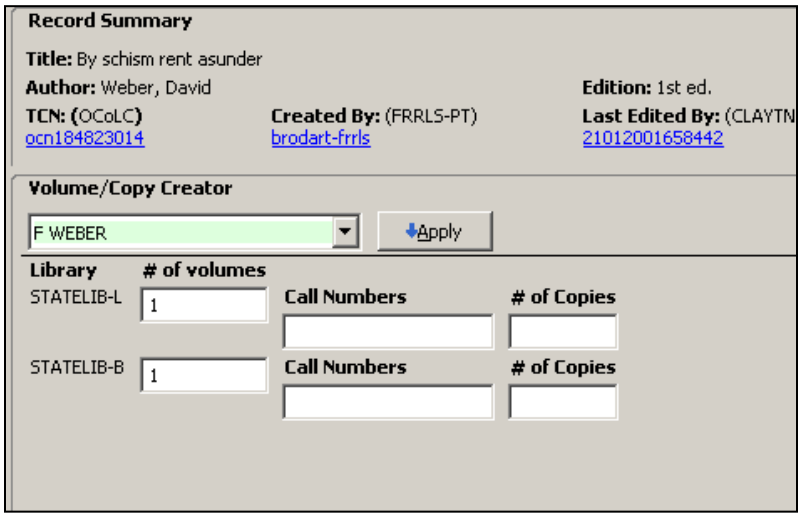
Using your mouse, click on the first library you are adding holdings to and then, depressing the **CTRL** key, click on each library in turn so that they are all highlighted:



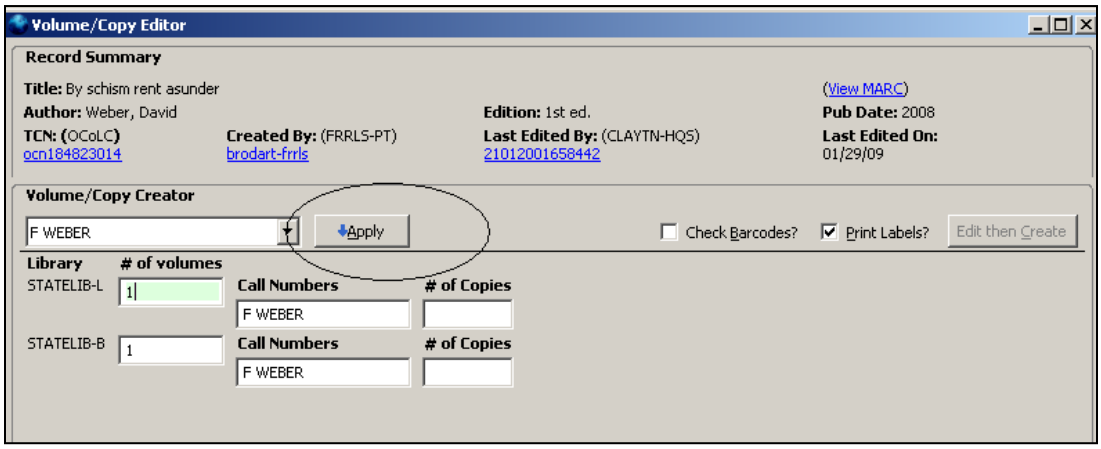
Follow the directions above to access the **Volume/Copy Creator**. Enter the number of volumes in the appropriate boxes for each library:



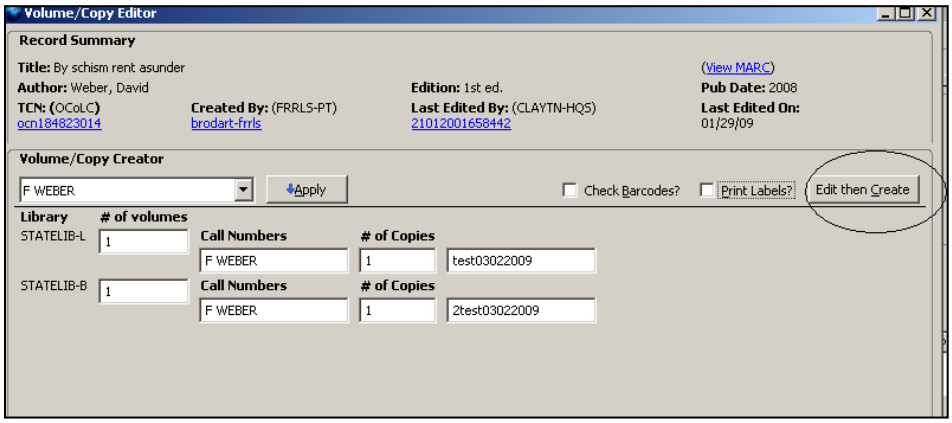
At this point, you can edit the call number:



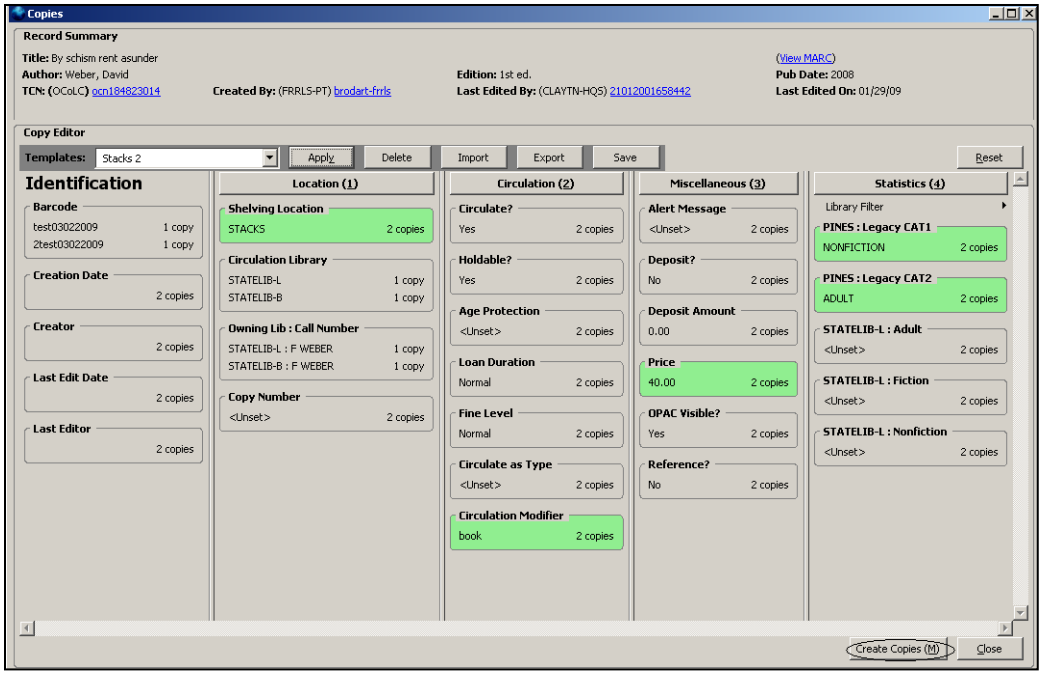
and apply it at one time to all the volumes:



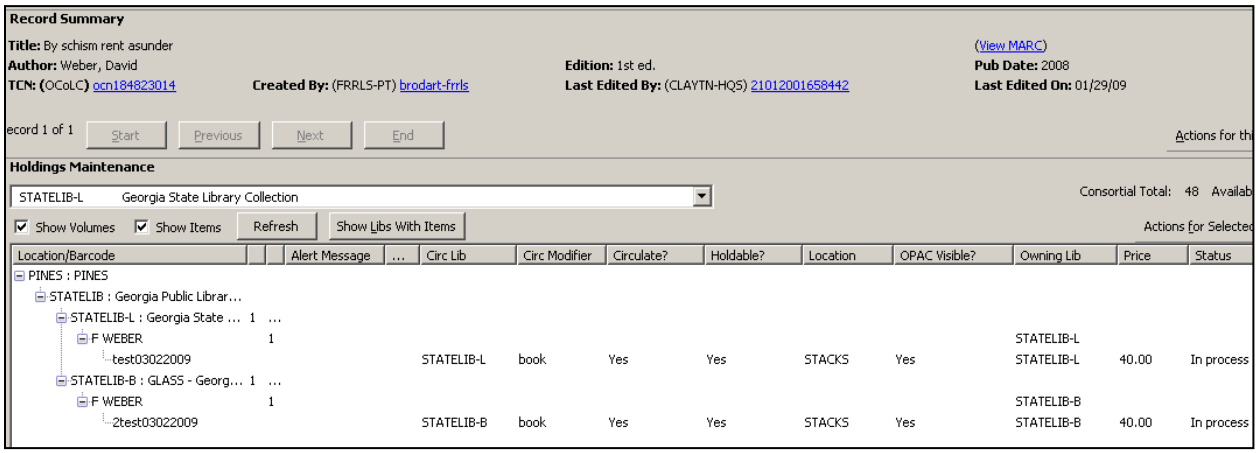
Add the number of copies and scan in your barcodes. Then press the **Edit then Create** (**ALT C**) button:



Apply your templates and make any necessary edits as described in previous sections. These will be applied to every copy when you create the copy:

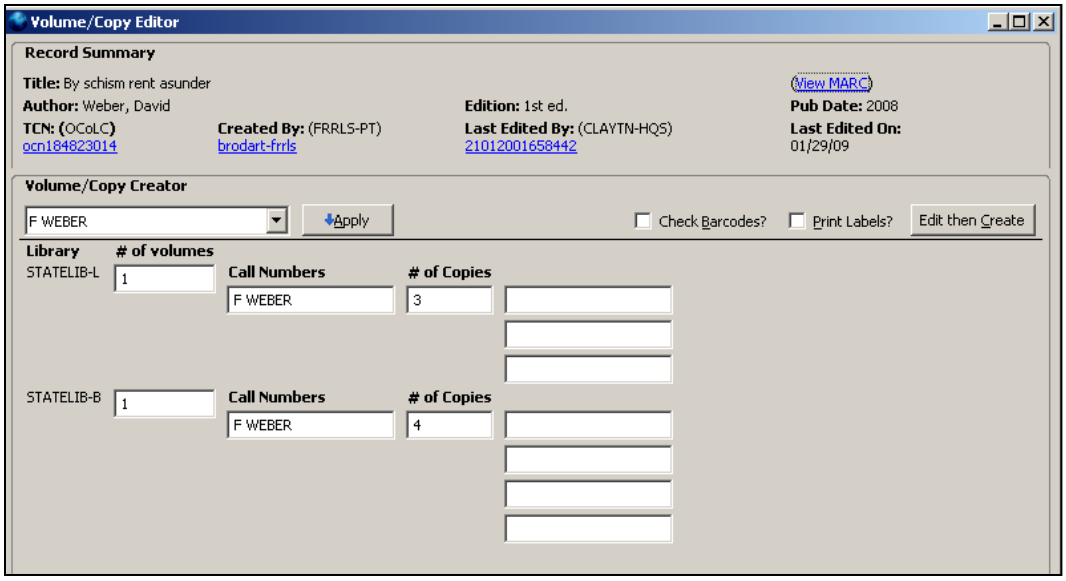


The resultant copies will display in **Holdings Maintenance**. Any changes to individual copies can be made at this time, following the directions in the section on editing copies.



6.3.2 Adding single volumes with multiple copies to multiple branches

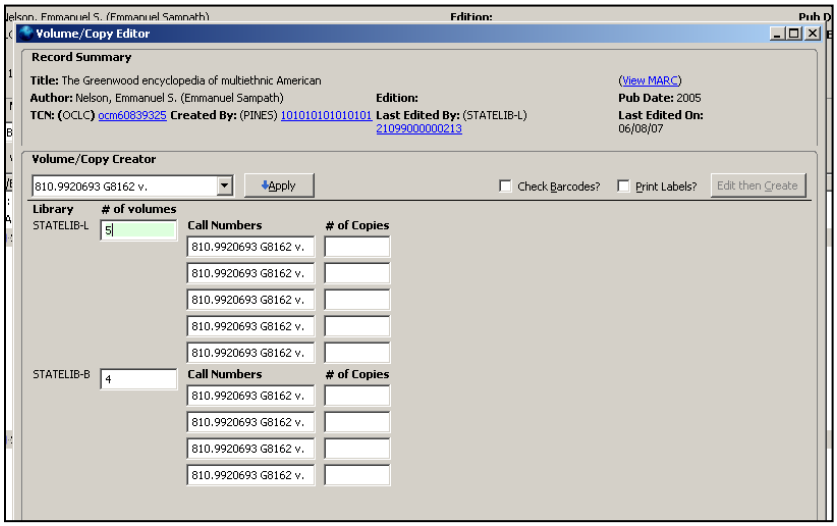
Follow the directions in section 6.3.1, keying in the number of copies for each call number. The number of copies can differ for different libraries:



Scan in your barcodes, click on **Edit then Create** (**CTRL C**). Then edit the item attributes as described in previous sections. Any changes to individual copies can be made after they are created.

6.3.3 Adding multiple volumes with single copies to multiple branches

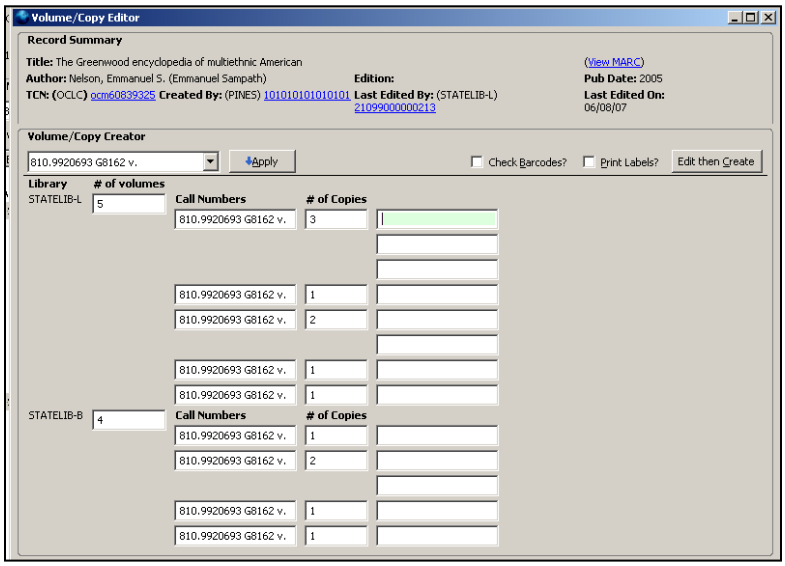
Follow the directions in section 6.3.1, keying in the number of volumes for each library or branch. The number of volumes can differ for different libraries. If the call numbers you are assigning contain the volume, part or other section number or numbers (see example below), you can key that into the call number well to apply to all volumes. Then just edit each to the correct volume, part or section number as you add the barcodes:



Scan in your barcodes, click on **Edit then Create** (**CTRL C**). Then edit the item attributes as described in previous sections. Any changes to individual copies must be made after they are created.

6.3.4 Adding multiple volumes with multiple copies to multiple branches

Follow the directions above, inputting the number of copies for each volume. Proceed as needed to apply templates and edit item attributes.



6.4 Checking in newly added copies

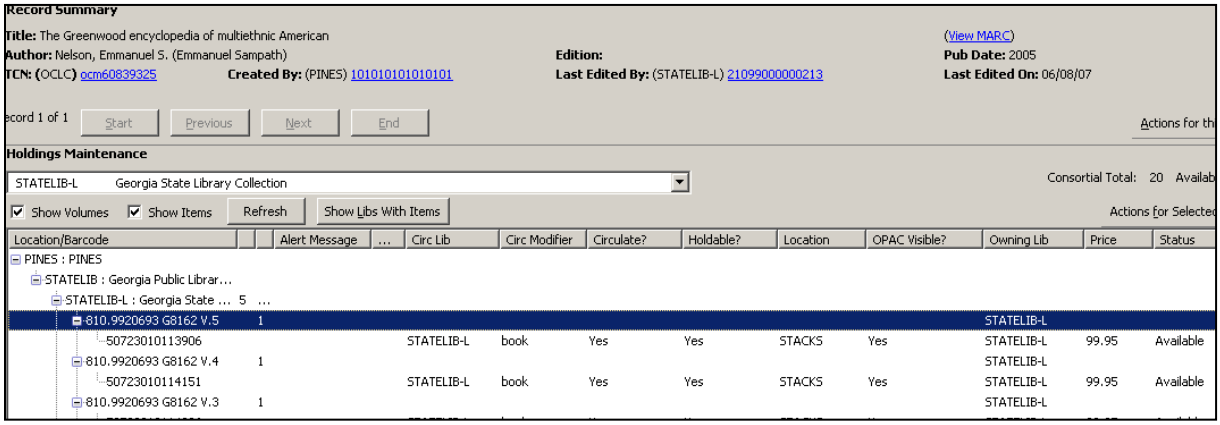
Newly added copies are assigned the default status of **In process** and need to be checked in by Circulation staff. This changes the default status to **Reshelving** for items located at the library's headquarter location. Items added for branches will be **In transit** if they are checked in at headquarters. Once these items are checked in at the branch library, they will be have the status **Reshelving**. Checking in the items will catch any holds placed on the item by patrons or staff. The **Reshelving** status will automatically change to **Available** after approximately 24 hours. The item can be checked out or placed on hold while in **Reshelving**.

Manually changing status of an item from **In process** to another under **Status** on the C**opy Editor** screen is not recommended since staff will not be alerted of any holds placed on the item while it is **In process.**

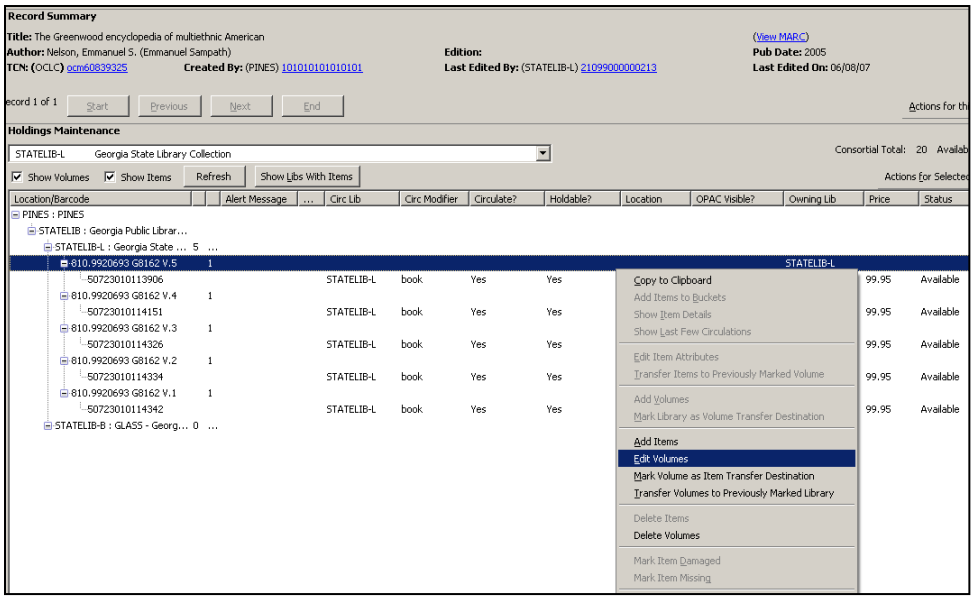
Chapter 7 Holdings Maintenance: editing or deleting volumes and copies

7.1 Editing volumes/call numbers

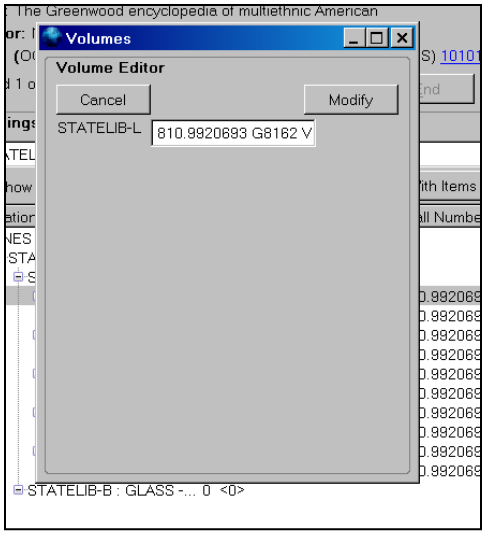
If you need to make changes to an existing call number in Evergreen, from **Holdings Maintenance**, highlight the call number you need to edit:



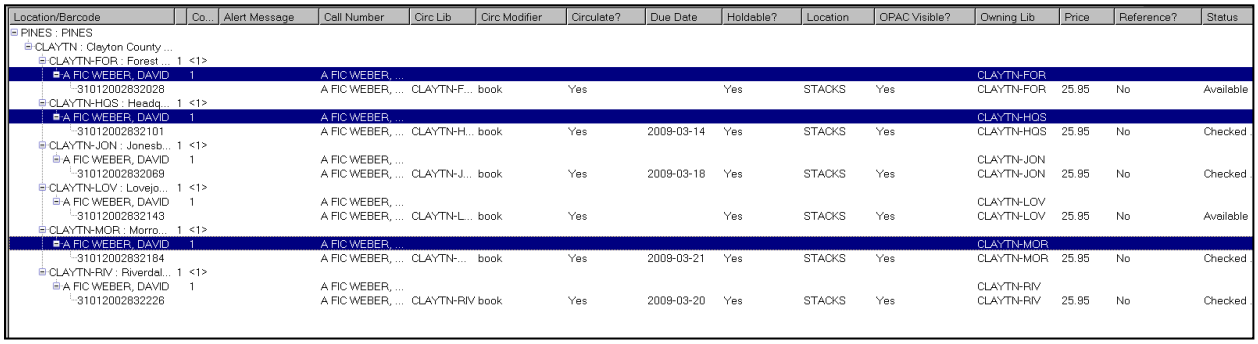
Then access the **Actions for This Row** menu for **Edit Volumes** (**CTRL E**, twice)



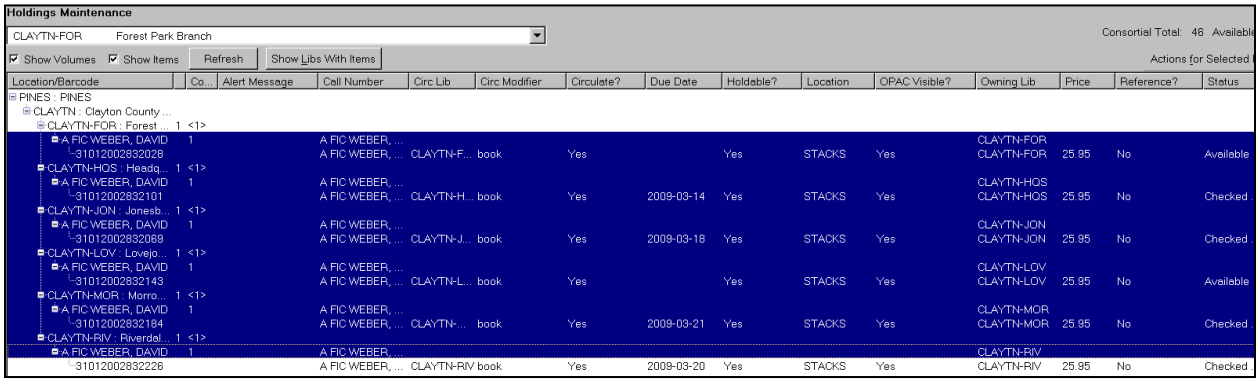
A dialog box opens that allows you to edit the call number:



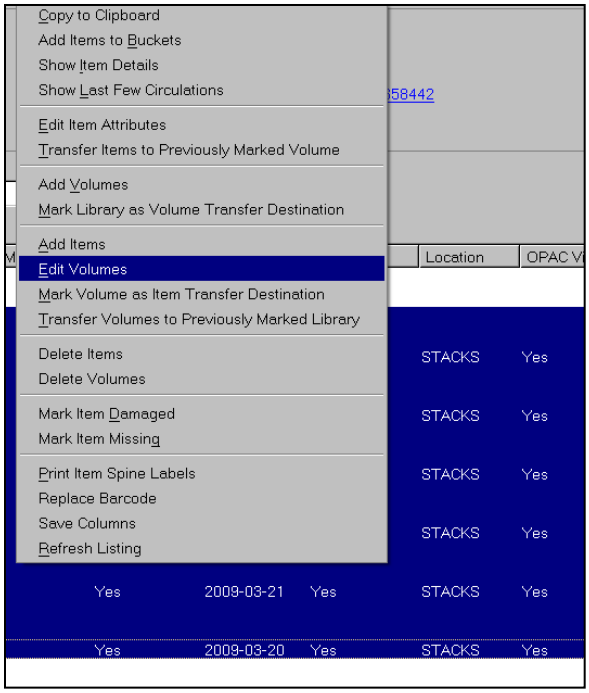
You can edit multiple call numbers across multiple branches at one time, if you have the permission level to do so. You have several options to choose the call numbers to edit, depending on whether they are contiguous or not. In **Holdings Maintenance**, highlight the first call numbers you wish to edit then, holding down the **CTRL** key, click on each one you need to edit to select. Clicking on a highlighted volume while holding the **CTRL** key will deselect it.



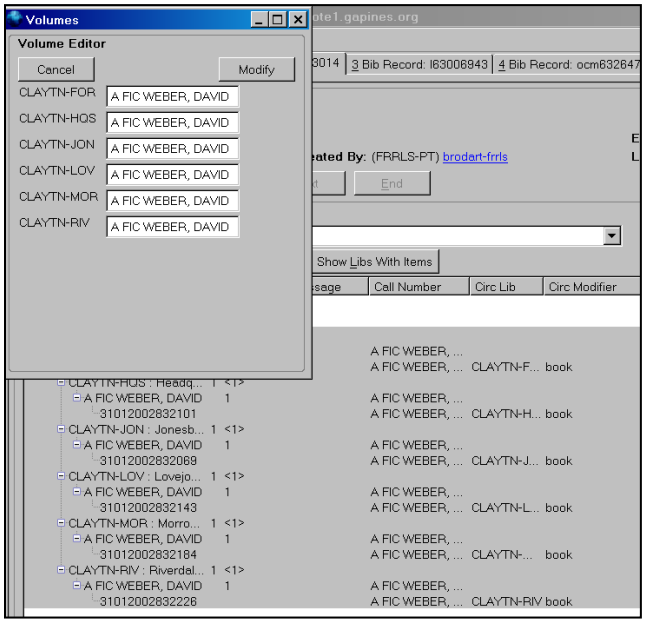
Or, with either the first or last call number you need highlighted, hold down **CTRL** + **SHIFT** keys, and click on the last in the list to be edited. All call numbers within the range will be selected:



In the **Actions for Selected Rows** menu, choose the **Edit Volumes** (**CTRL E**, twice) command:



The volume editor will open. Make the necessary edits to the call numbers and click on the **Modify** button to save changes.

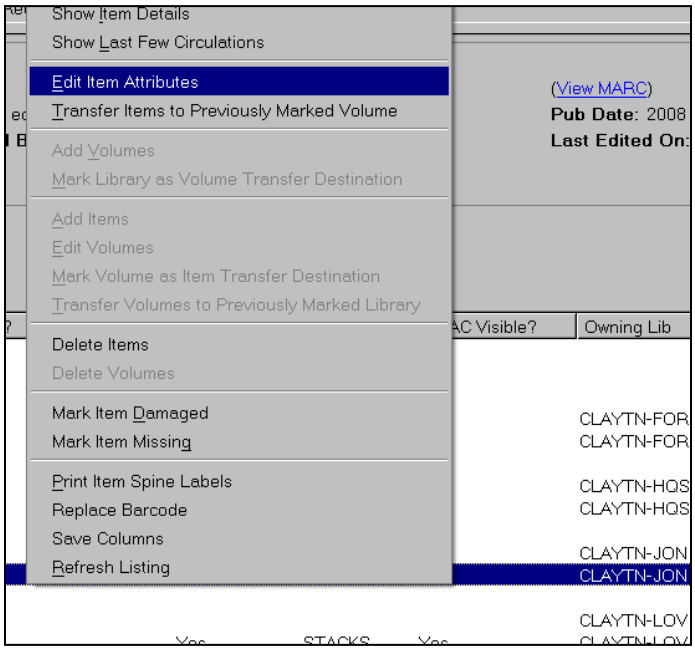


Evergreen will then redisplay the list with your edits. If a display problem causes the changes not to display, refresh the listing.

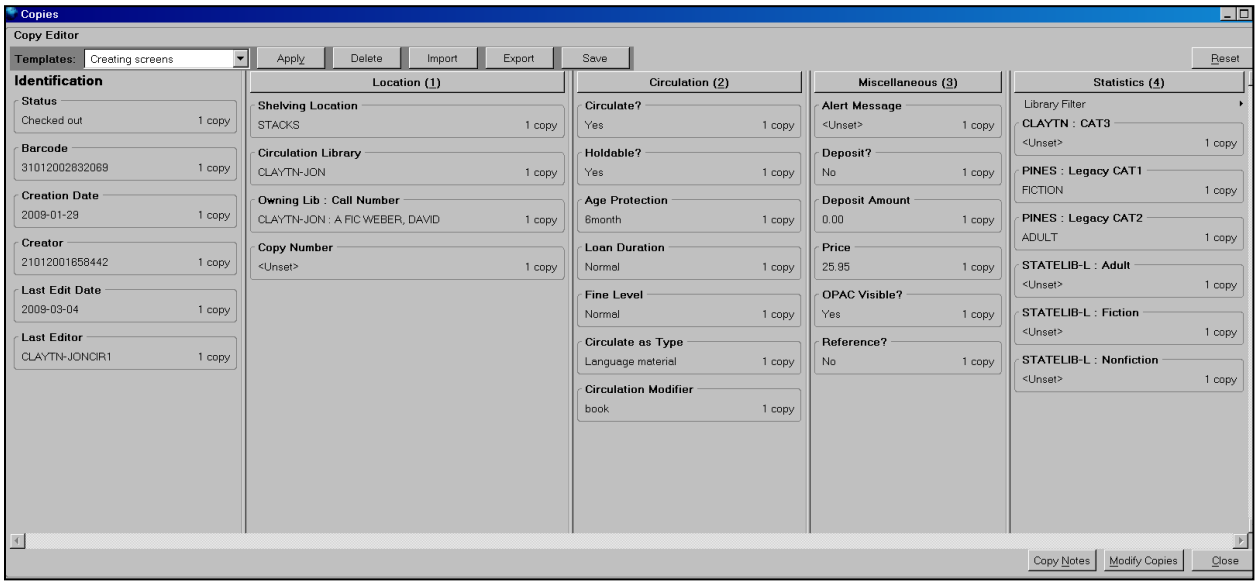
7.2 Editing copies/items

The **Holdings Maintenance** view is also where you edit item attributes for existing copies.

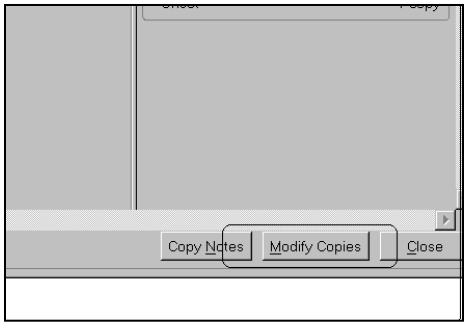
Select the item you wish to edit and then choose **Edit Item Attributes** for the **Actions for Selected Rows** menu:



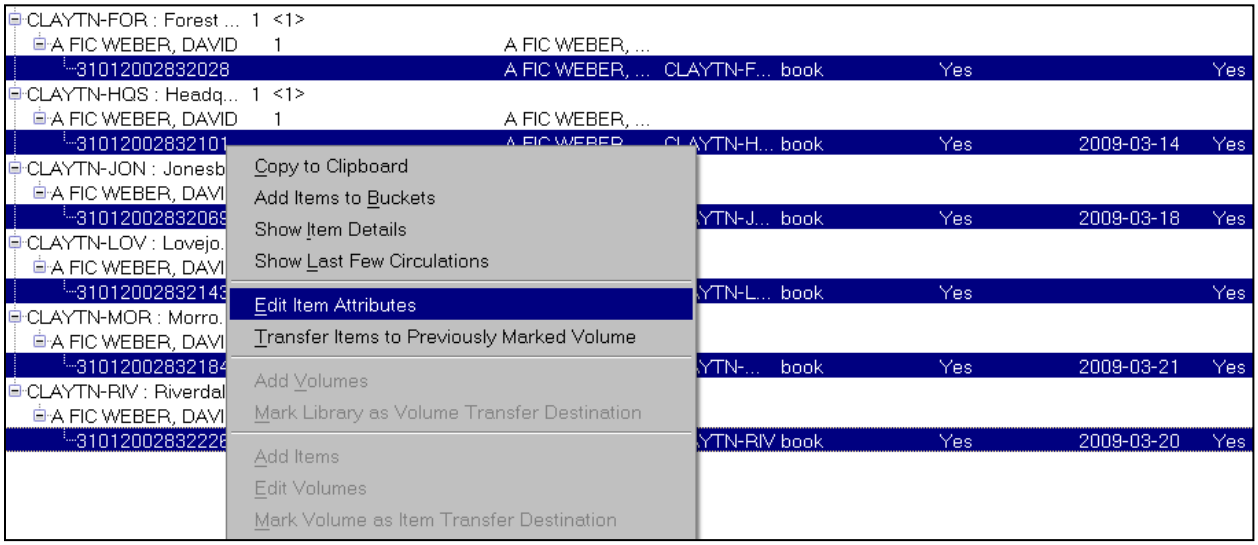
The **Copy Editor** will open:



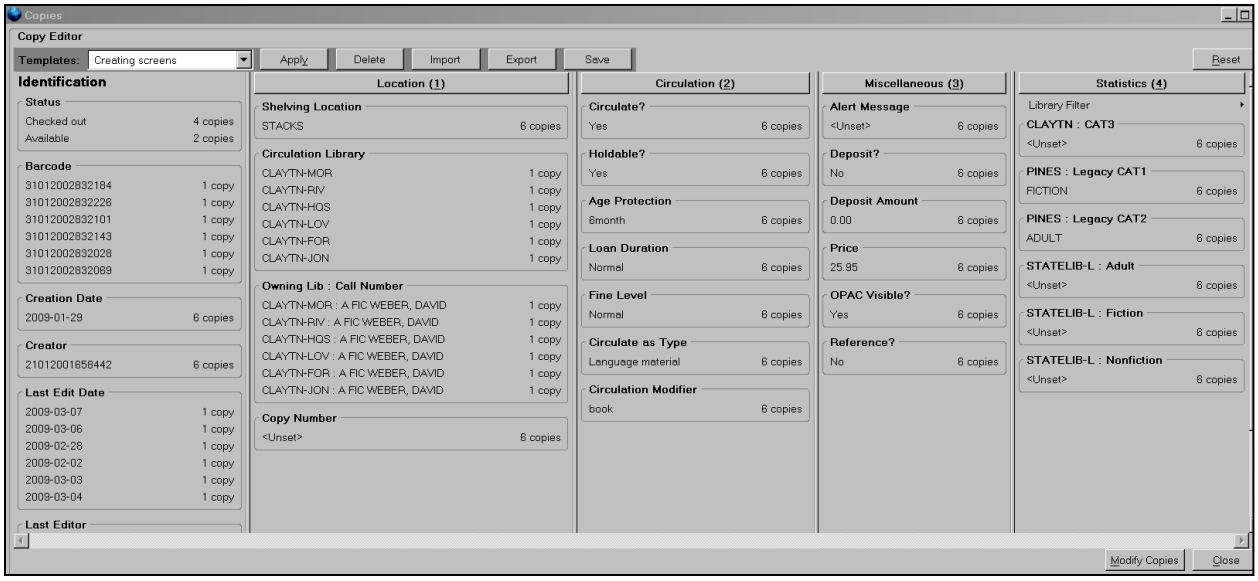
From there, you can edit any of the attributes, apply templates or add copy notes. Be sure to click on the **Modify Copies** button (**CTRL M**) to save any changes you make.



As with editing volumes, you can simultaneously edit multiple copies across multiple libraries/branches, with the appropriate permission level. Select the copies to edit following the procedures outlined above. Either click on each copy individually while depressing the **CTRL** key, or holding down the **CTRL** + **SHIFT** keys to select a range of copies. Then access the **Copy Editor** through the **Actions for Selected Rows** menu:



From the **Copy Editor**, you will then be able to make global changes for all the copies you have selected:

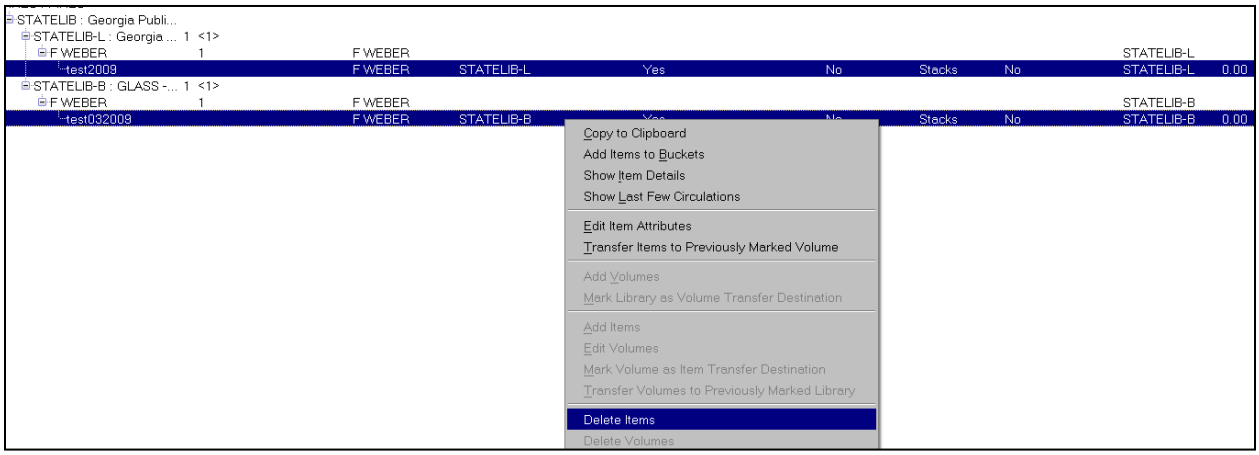


You cannot add copy notes nor make changes to individual copies at this point. Batch global editing across several title records is covered in a subsequent chapter.

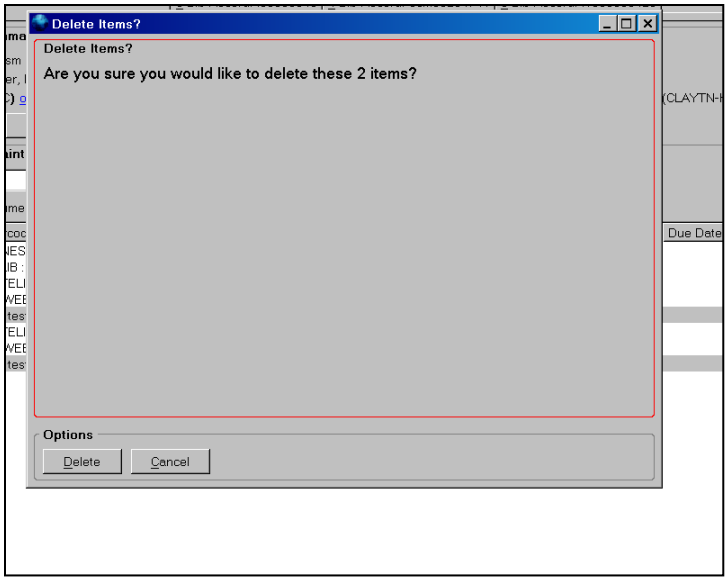
7.3 Deleting copies

If you just need to delete copies from one title record, using the **Actions for Selected Rows** menu is probably the easiest way.

Select either one or several items to delete and choose **Delete Items** from the **Actions for Selected Rows** menu:



You will then see a dialog box verifying the deletion:



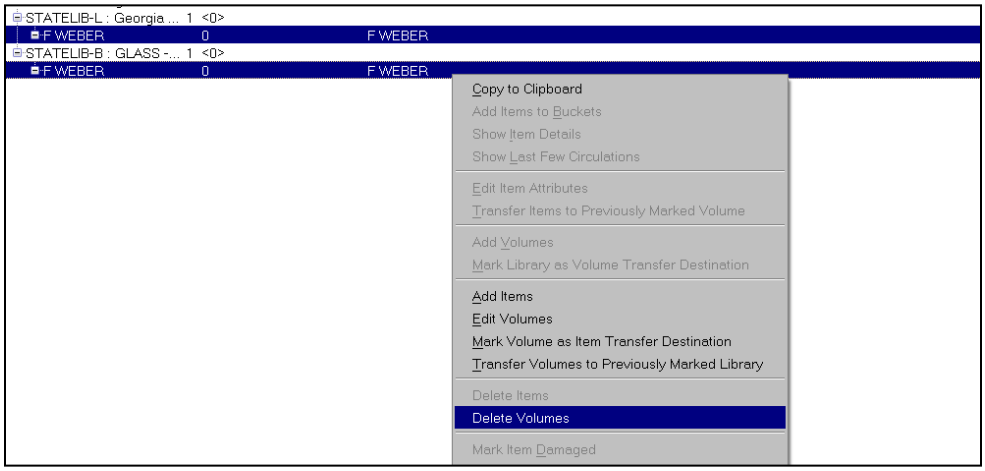
After confirmation, a dialog box informs you that the copies were deleted. Click **OK** and the system will redisplay the listing. If there is a display error or delay, you may need to force the refresh.

Batch deletion of copies is covered in the chapters on Using **Buckets** and Using the **Item Status** Interface.

7.4 Deleting volumes

If you just need to delete volumes from one title record, using the **Actions for Selected Rows** menu is probably the easiest way. You cannot delete volumes that contain copies. In release 1.4.0.7, automatic deletion of volumes when the last copy attached is deleted occasionally does not occur. The presence of empty volumes does not adversely affect the functioning of the software; but, it will prevent the record from being deleted and may cause confusion if left.

Select the volume or volumes you wish to delete and choose the **Delete Volumes** function from **Actions for Selected Rows** menu:



A dialog box asking you to confirm the deletion will appear. After confirmation, a dialog box informs you that the volumes were deleted. Click **OK** and the system will redisplay the listing. If there is a display error or delay, you may need to refresh.

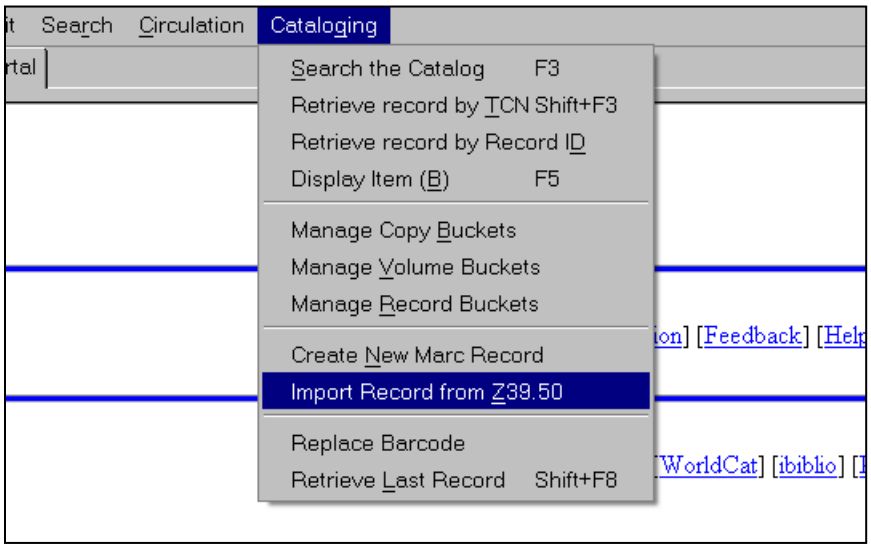
Batch deletion of volumes is covered in a subsequent chapter.

Chapter 8 Title Record Maintenance

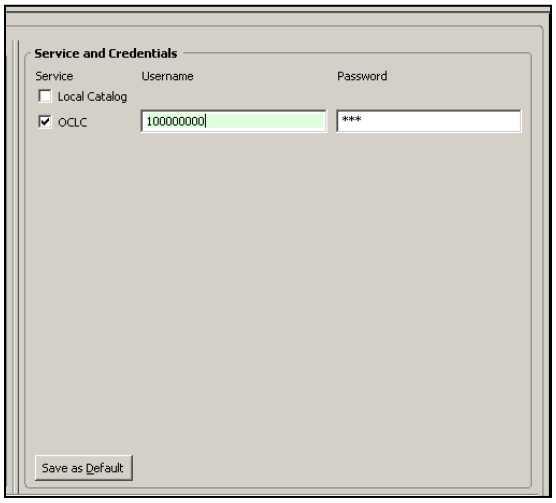
8.1 Searching OCLC via the Z39.50 Interface

If there is no matching record in the PINES database for your title, you will need to import a record into the PINES database from OCLC's WorldCat database. The sole source of bibliographic records for PINES is OCLC. Access to WorldCat is via the Z39.50 gateway in Evergreen. Using this resource, you can search and import MARC records into PINES.

Access to the Z39.50 gateway is under the **Cataloging** menu (**ALT G, CTRL Z**):

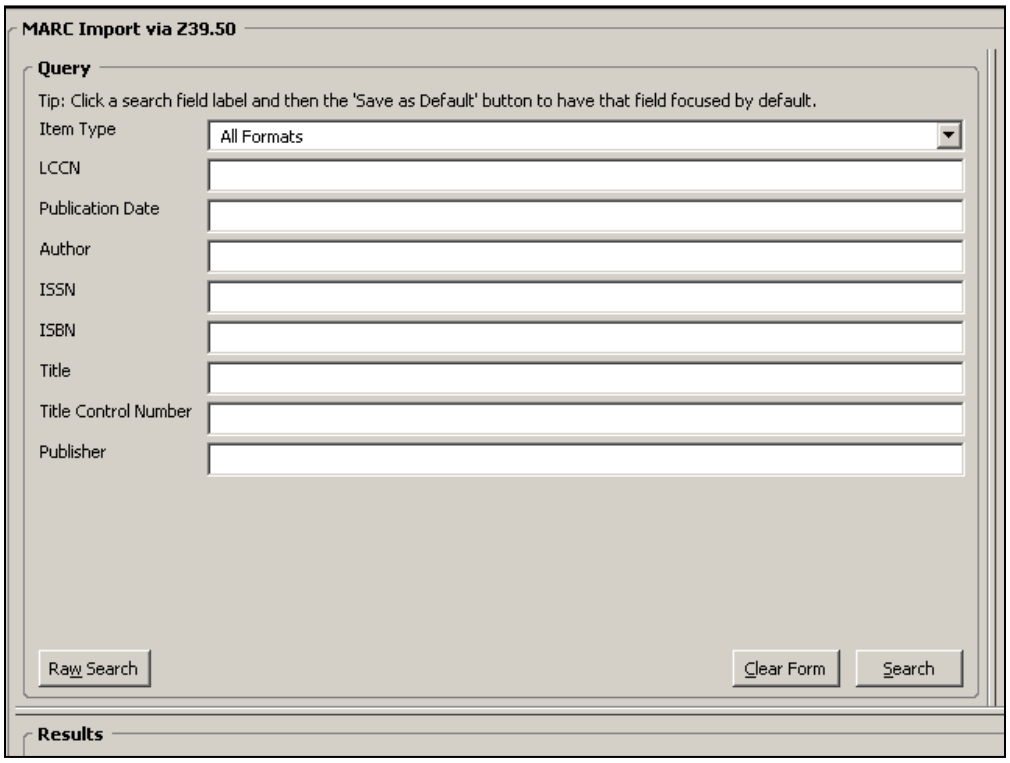


Since we are searching OCLC, you will need to use the authorization and password assigned to your library by OCLC. Under **Service and Credentials**, check the box for **OCLC** and input the authorization number as **Username. Save as Default (CTRL D**) to retain the login information for subsequent sessions.

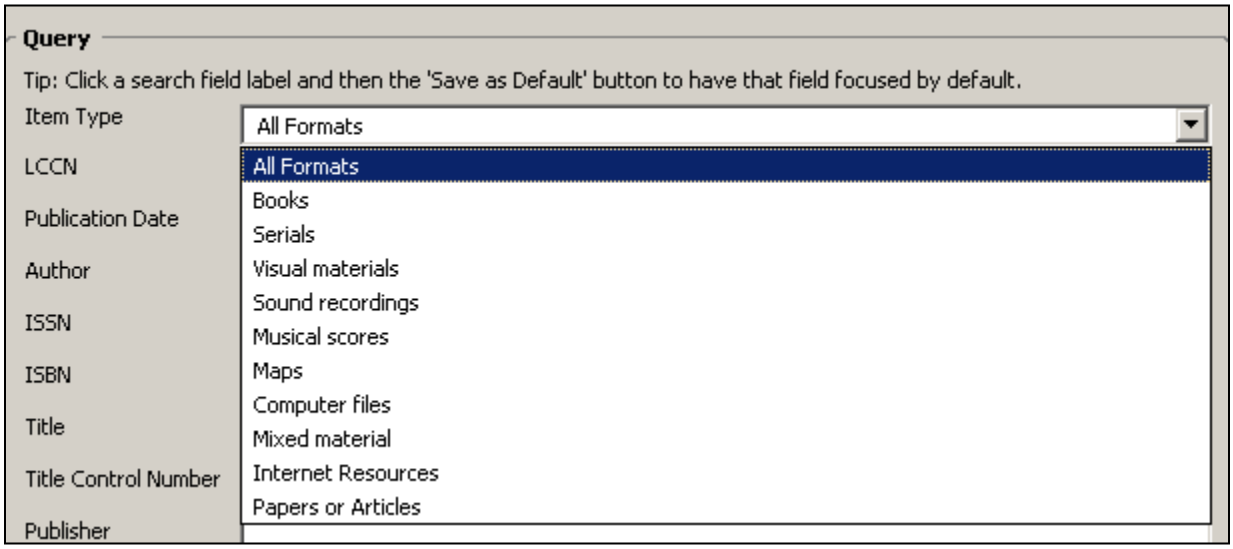


After you have saved your OCLC authorization and password, you will not need to input it again unless your workstation software is updated. Keep in mind that the input wells for the authorization and password can be accidentally edited. If you get a network server error when you search, check your login to see if it is correct.

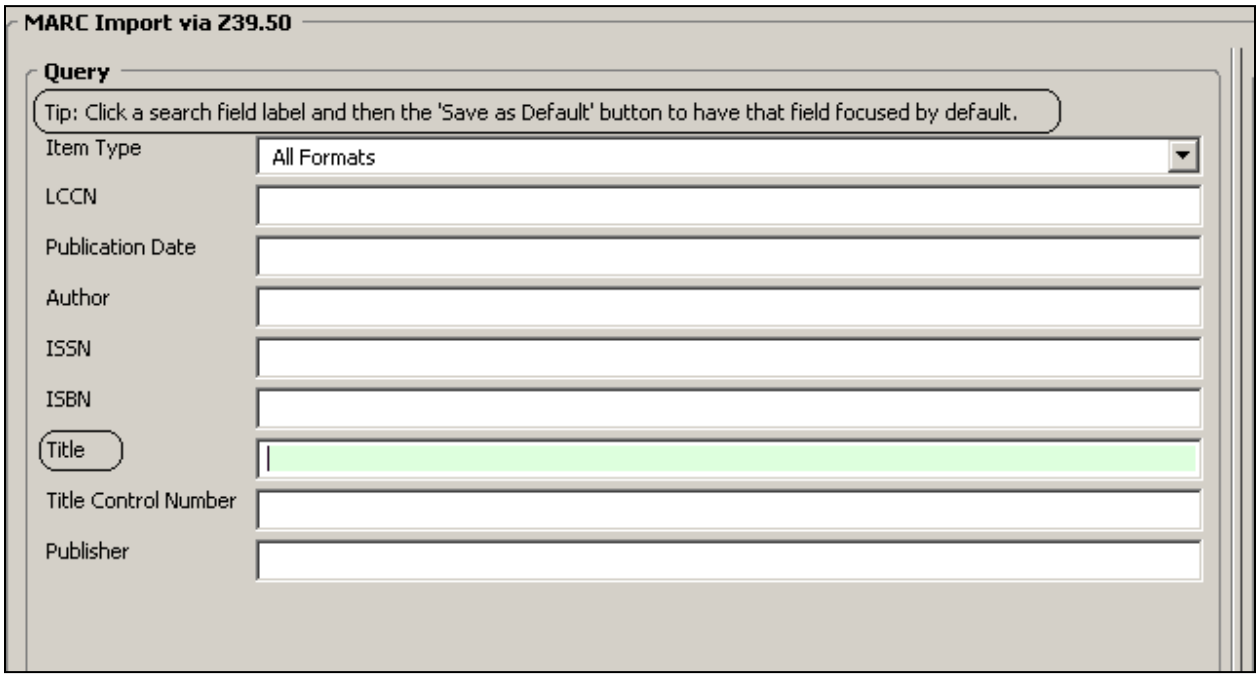
Searches can be input into specific search wells or you can construct raw searches. The search wells are for **LCCN, Publication Date, Author, ISSN, ISBN, Title,** (OCLC) **Title Control Number,** and/or **Publisher**. You can combine search terms (author/title, title/publisher, etc)



You can also filter searches by **Item Type**:



If you commonly perform the same type of search, you can have that search field focused by default. Click on the search field label:

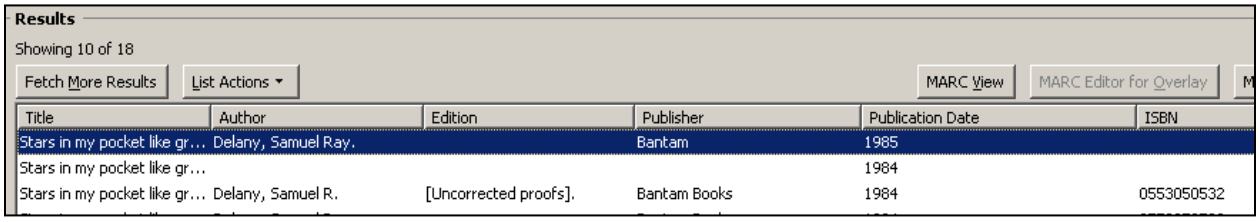


Then click on **Save as Default** (**CTRL D**). This will be your default for all subsequent Z39.50 sessions.

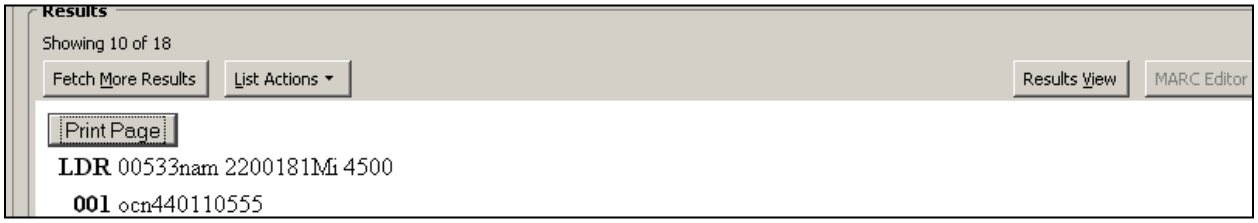
Click on the search button to connect to OCLC and process your search.

The **Clear Form** button clears the search form and resets to your default search box.

View your selected title by highlighting it and clicking on the **MARC View (CTRL V)** button:

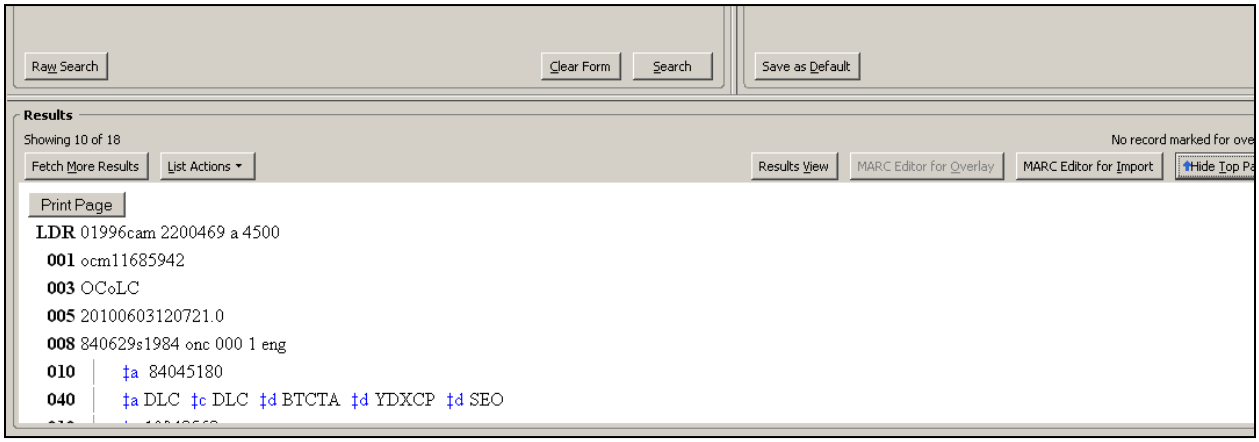


The **Results View** button returns to your results:

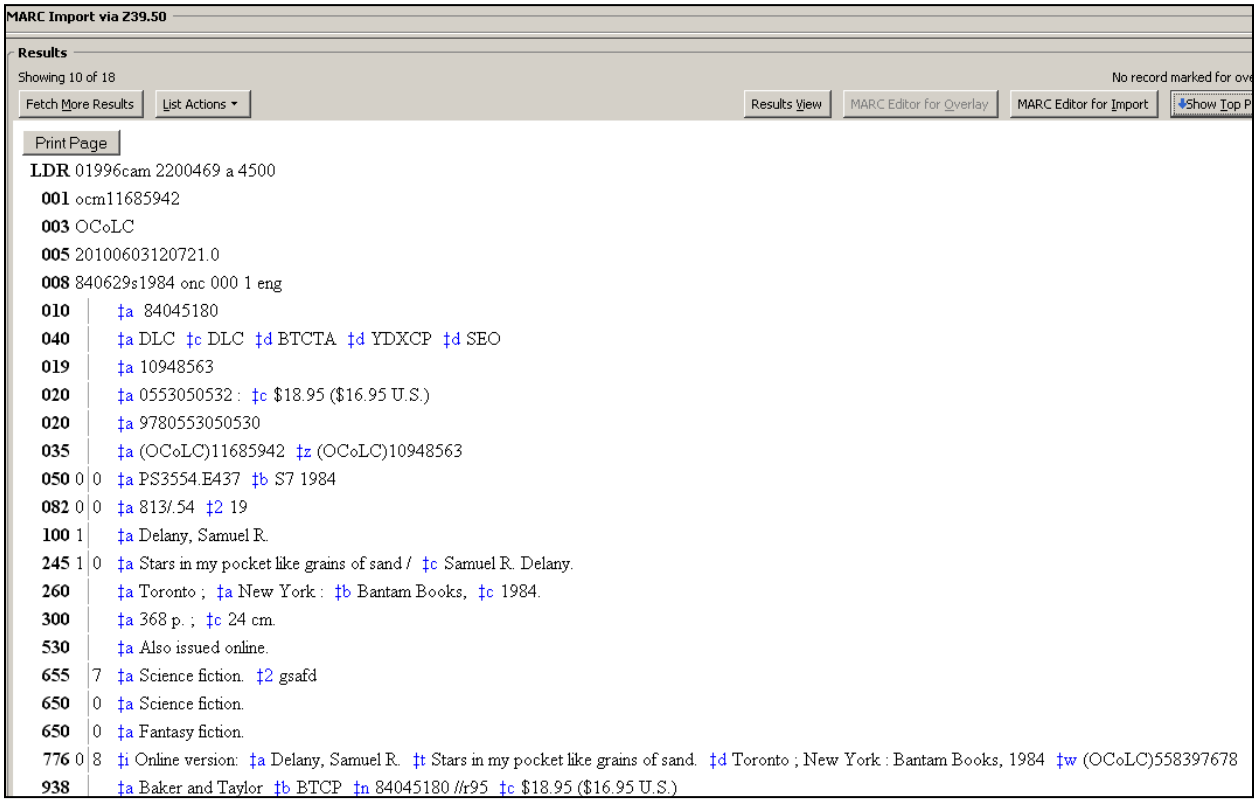


The **Hide Top Pane** button is useful when you wish to see the entire search list or the complete record:

With the top pane:

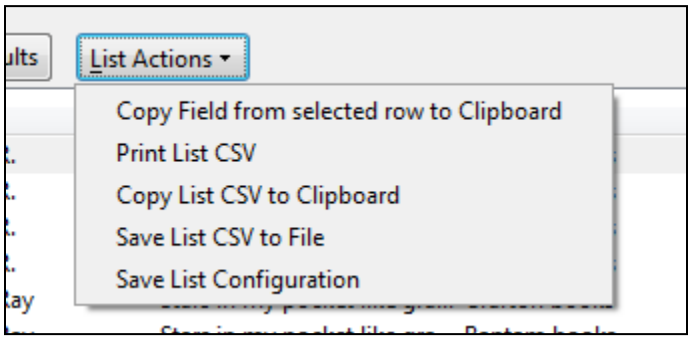


Without the top pane:



Click on the **Show Top Pane** button to display the Z39.50 search boxes.

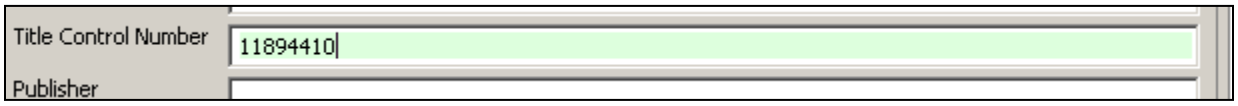
The **List Actions** drop-down menu allows you to copy fields from a row, print or save CSV formats of the result set or save any changes you make to the list configuration.



8.1.1 Number searches

8.1.1.1 Title Control Number searches

Search OCLC title control or accession numbers without prefixes, leading zeros, or the symbols # or *. For example 11894410 rather than ocm11894410:



8.1.1.2 ISBN and ISSN searches

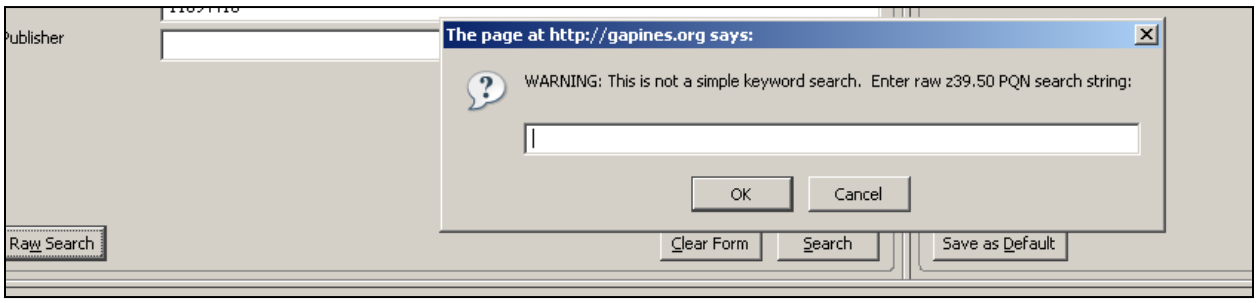
Drop all hyphens or dashes when searching ISBNs (International Standard Book Number). Enter an ISSN (International Standard Serial Number) with a hyphen.

8.1.1.3 LCCN searches

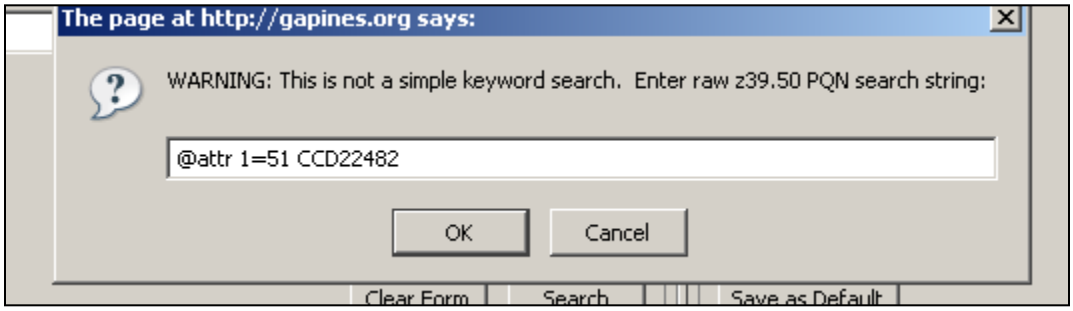
LCCNs (Library of Congress Control Numbers) can be searched with or without hyphens. For example “92-50730” or “92050730”.

8.1.1.4 Music or publisher number searches (Raw searches)

Currently, music or publisher numbers are only searchable in Evergreen through the raw search function. Underneath the defined search boxes is a button “Raw Search”. Click on it for a text box to enter a search string for numbers in the MARC 024,028 fields.



The search string must be constructed beginning with the phrase @attr 1=. The search itself will be in the format: @attr 1= [index id] [number]. Retain most punctuation except spaces in the number. The index id number for MARC field 028 (publisher number) is 51. For example, for the music number in the 028 field CCD-2248-2, construct the raw search as: @attr 1=51 CCD-2248-2, or @attr 1=51 CCD22482



Click on **OK** to process the search.

For a number with a prefix, @attr 1=51 QCT38653 [no space after QCT]

For other standard identifier (MARC field 024), the index id number is 1007: @attr 1=1007 [number]. For example, to search for 7464386532, construct your search as attr 1=1007 7464386532

For more information on raw searches in OCLCs Z39.50 gateway, see the online document:

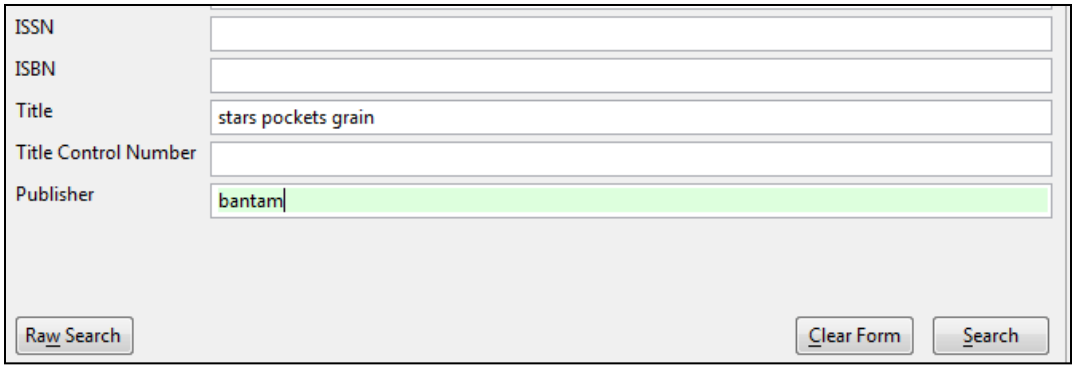
OCLC. (2008). Searching Tips for OCLC Z39.50 Cataloging. Retrieved June 3, 2010, from http://www.oclc.org/support/documentation/z3950/searchtips/.

Note: You may find it easier to search for music and other numbers directly in OCLC either through the Connexion Client or using WorldCat in Galileo. Also, any search that returns a large number of records might be better searched in the client or Galileo, where there are more options to filter out unnecessary results. You can access Galileo from Evergreen (See section 8.2).

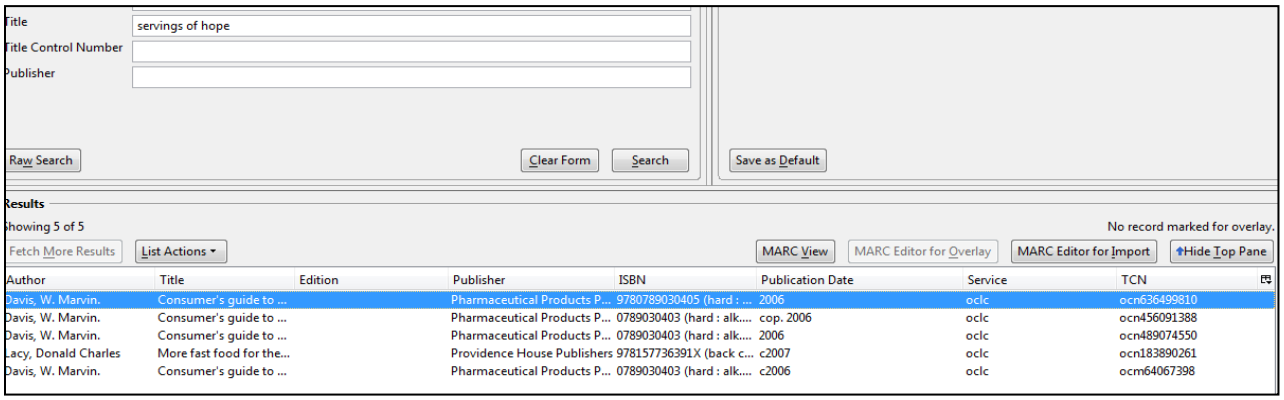
Note: If in the **Service and Credentials** area you have selected BOTH **Local Catalog** AND **OCL**C, the **Raw Search** is grayed out and unavailable. In order to do a **Raw Search**, the **Local Catalog** selection must be unchecked.

8.1.2 Title, author, publisher and Publication Date searches.

You can also search by author, title, publication date and/or publisher. The title does not have to be complete. For example, rather than the complete title Stars in my pocket like grains of sand, you can search “stars pocket grains”:



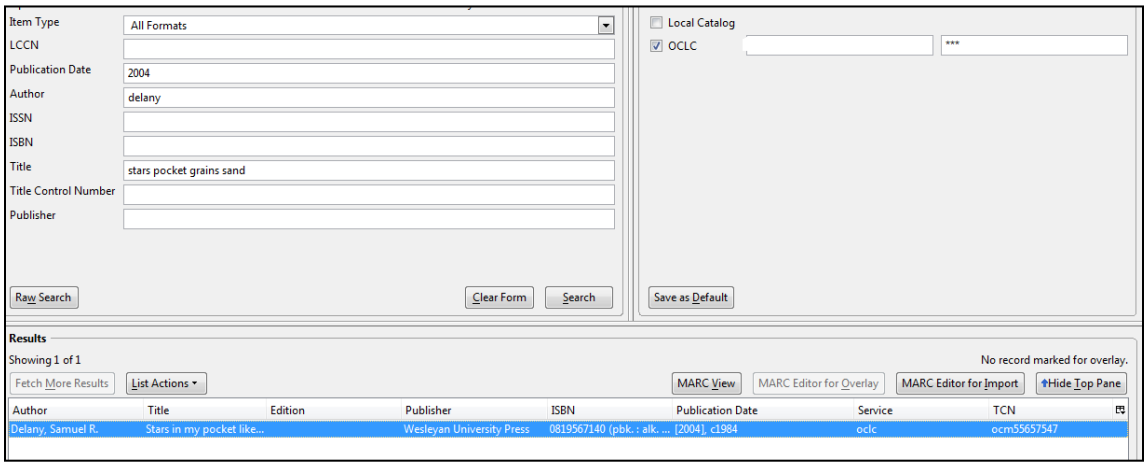
You can also search using the subtitle. For example, searching “servings of hope” retrieves titles with those words in the subtitle:



You can also search using a partial author name or a publisher; however, care should be taken to prevent the retrieval of too large a result set.

8.1.3 Combining search terms

You can create combination searches using any of the search queries to refine your search. For example you can search author, title, and publication date:



Publication dates can be single, as in the above search or a range, such as 1984-1990.

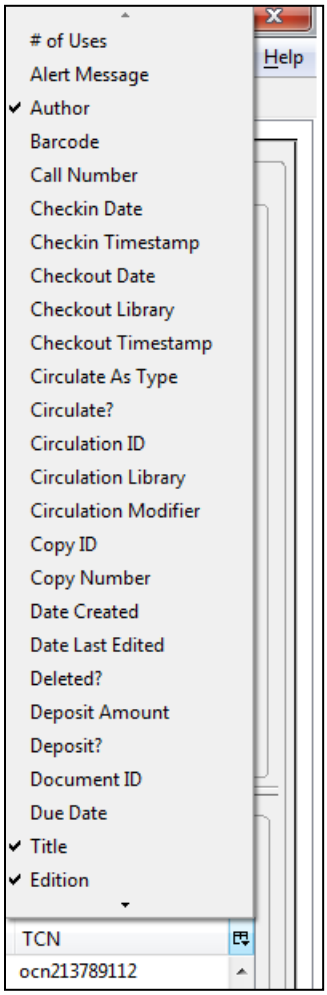
8.1.4 Fetching more results

Searches are returned 10 records at a time. By clicking on **Fetch More Results** you can list 10 more until you reach the total number retrieved.

If you have the **Local Catalog** and **OCLC** selected in the **Service and Credentials** area, and your result list contains items from within PINES (those items will be marked as **native-evergreen-catalog** as opposed to **oclc**) when you select **Fetch More Results**, you will get an error message. To get around this you must either deselect the **Local Catalog** and redo the search, or, you need to use the **Item Type** filter and select from the drop down list, and then you can **Fetch More Results**.

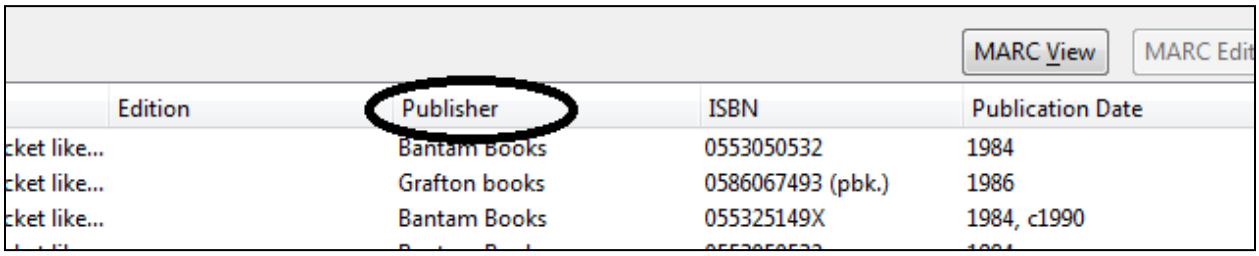
8.1.5 Customizing the display

The display can be customized and rearranged by using the column picker:

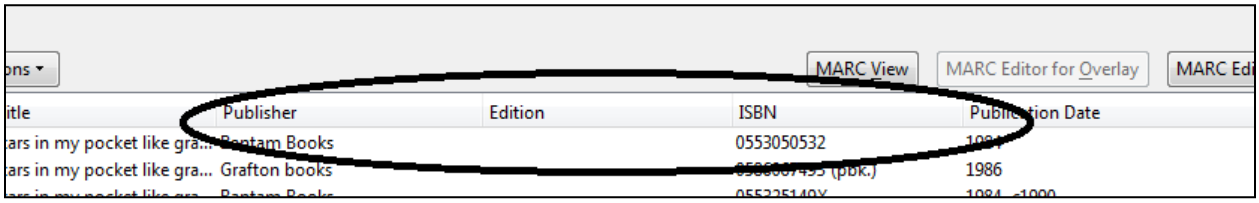


Scroll down or up to see the columns available.

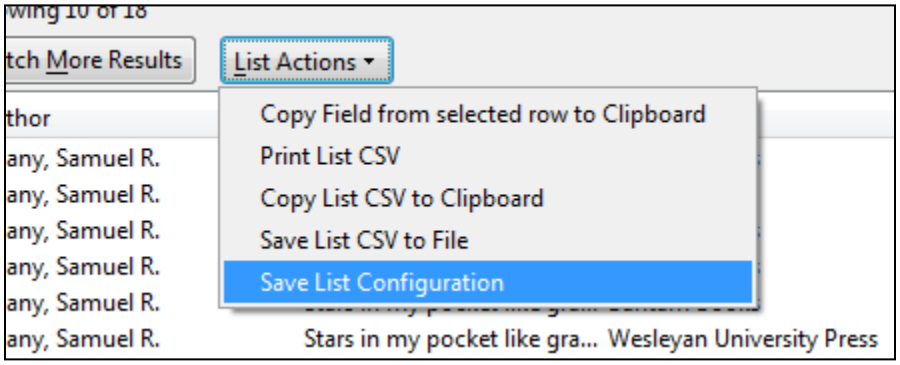
You can also rearrange the column order by grabbing the column title with your mouse and moving it to your preferred location. For example, with your cursor on **Publisher**:



Click and hold with the left mouse button and move your cursor to the left of **Edition.** When you release the button, the column will have moved to its new location:



To save your customized column list and arrangement, **Save List Configuration** under the **List Actions** button:

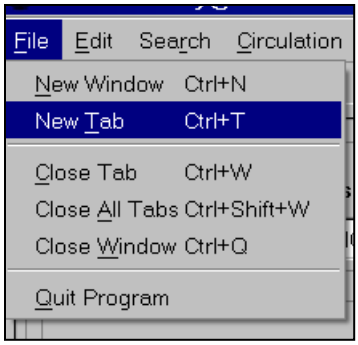


The default order of records returned in the Z39.50 interface is by attached library holdings. The title with the most holdings attached is the last one since the list is populated from the bottom up.

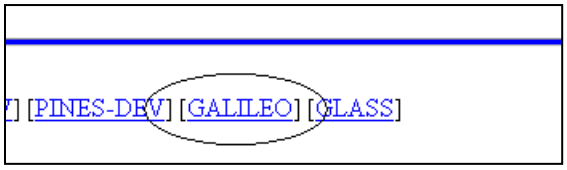
Clicking on the column labels will order the result set by that column. For example, if you click on the **Publication Date** column, the list will be ordered by publication date. Clicking on the column title once orders it from most recent to earliest, or A to Z. Clicking a second time reverses the order so that the earliest is at the top of the list. This only orders the number of titles you have displayed. You have to fetch all the results to order everything.

8.2 WorldCat access through Galileo

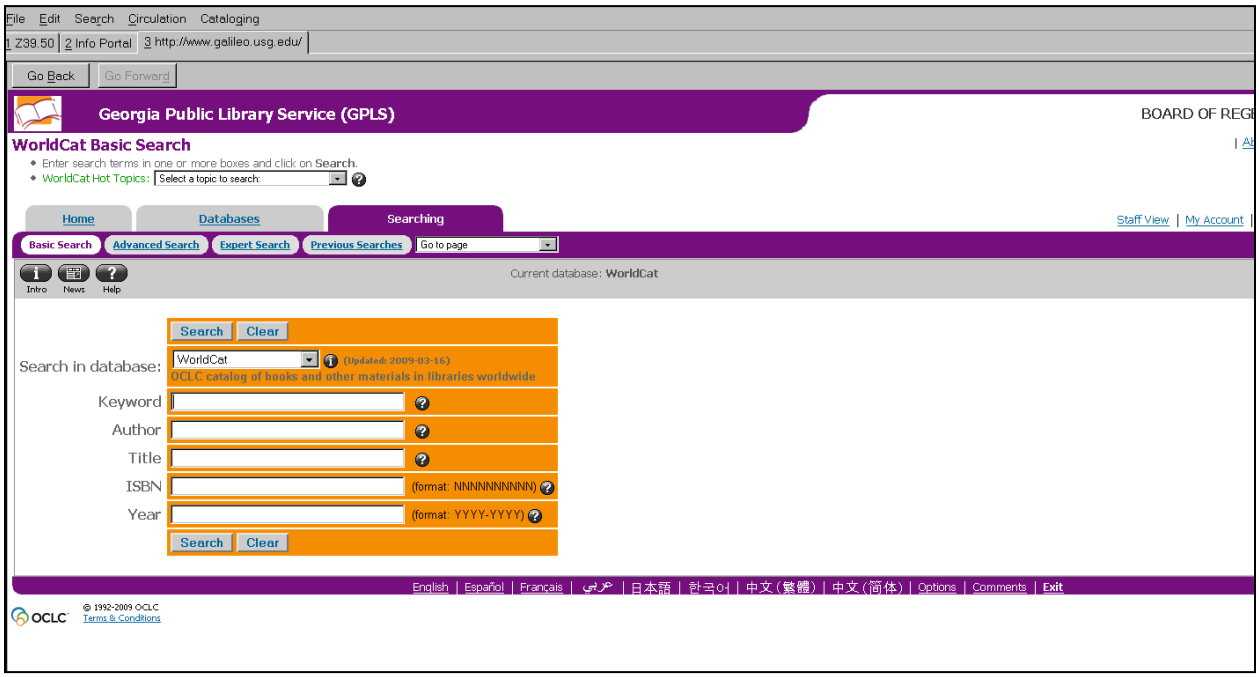
To access Galileo through Evergreen, first open a new tab:



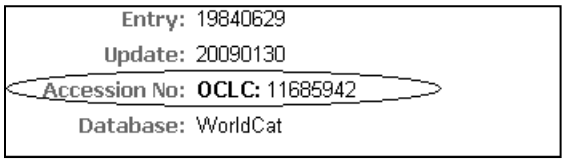
Next, click on the Galileo link:



A new tab will open with an authenticated Galileo session. Choose the Worldcat database



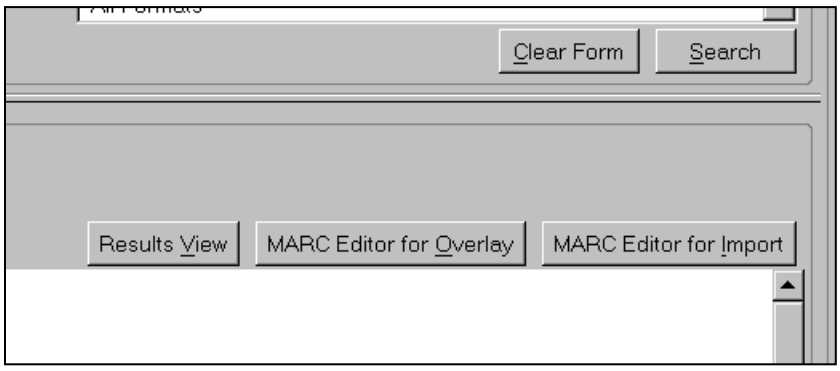
You can then perform number searches that are not in the predefined Z39.50 search boxes in Evergreen or refine searches through the advanced search option. When you find a matching record, copy the accession number (OCLC TCN) and input it into the appropriate Z39.50 search box:



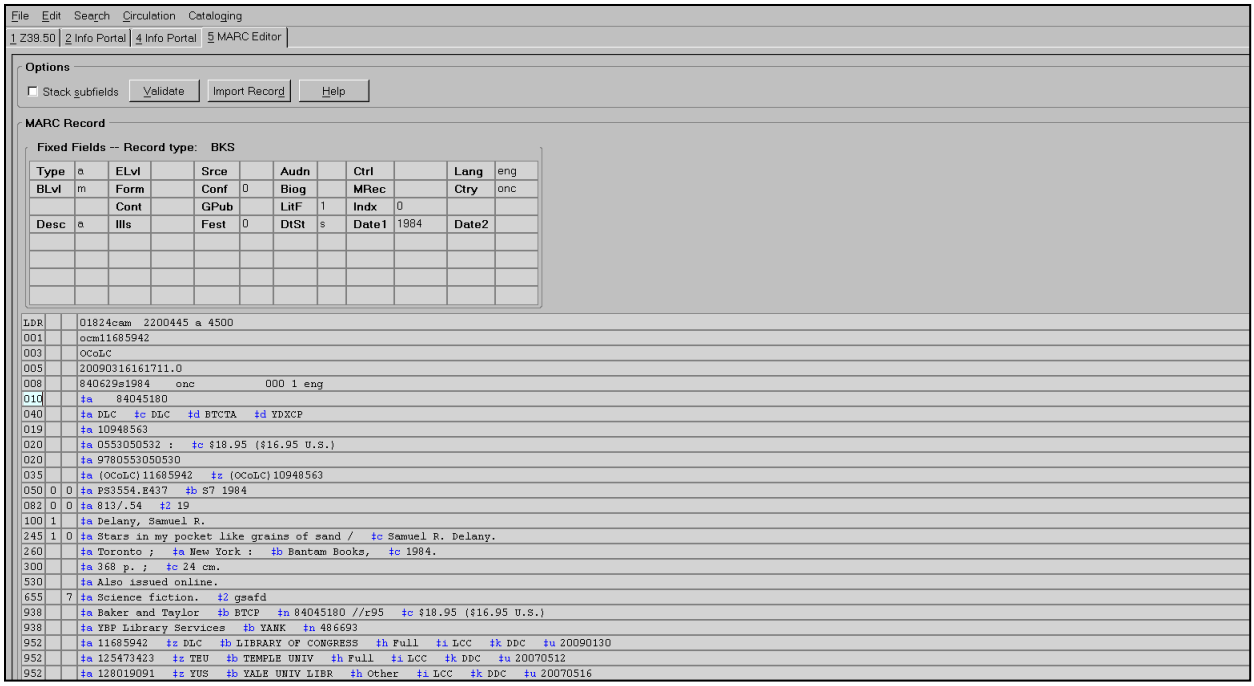
8.3 Importing OCLC Records from the Z39.50 Interface

Once you have identified a record that matches your item in hand, you are now ready to import the OCLC record into the PINES database.

From either the **MARC View** or from the list of records returned, with your record highlighted, click on the **MARC Editor for Import** (**CTRL I**) button:



A new tab will open with the selected record in the **MARC Editor**.



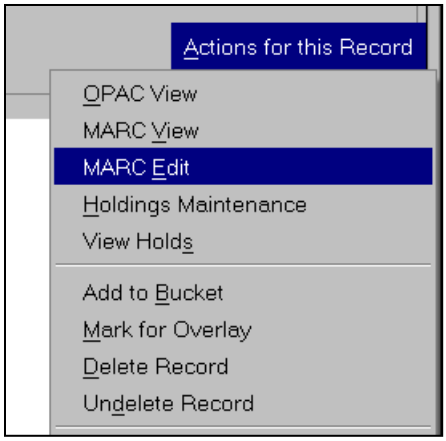
Make any necessary edits to the MARC record as covered in the section **Editing MARC (Title) Records**. When you are ready to import, click on the **Import Record** (**CTRL D**) button. The **MARC Editor** tab will redisplay the record in your chosen default view. You are now ready to add holdings as described above.

8.3.1 Preventing importing duplicate records

Please keep in mind that the majority of records in the PINES database do not have OCLC number based TCNs. If you import an OCLC record into PINES and the OCLC number is used as an existing record TCN (title control number), you will get a warning that the record already exists in PINES. However, if the incoming record has a match in PINES but its TCN is not an ocm or ocn TCN, Evergreen does not generate a warning. So please search and match your items carefully before importing a new record. Best practice is to overlay an OCLC record onto an existing PINES record that does not contain an OCLC number based TCN (see section on Overlaying title records).

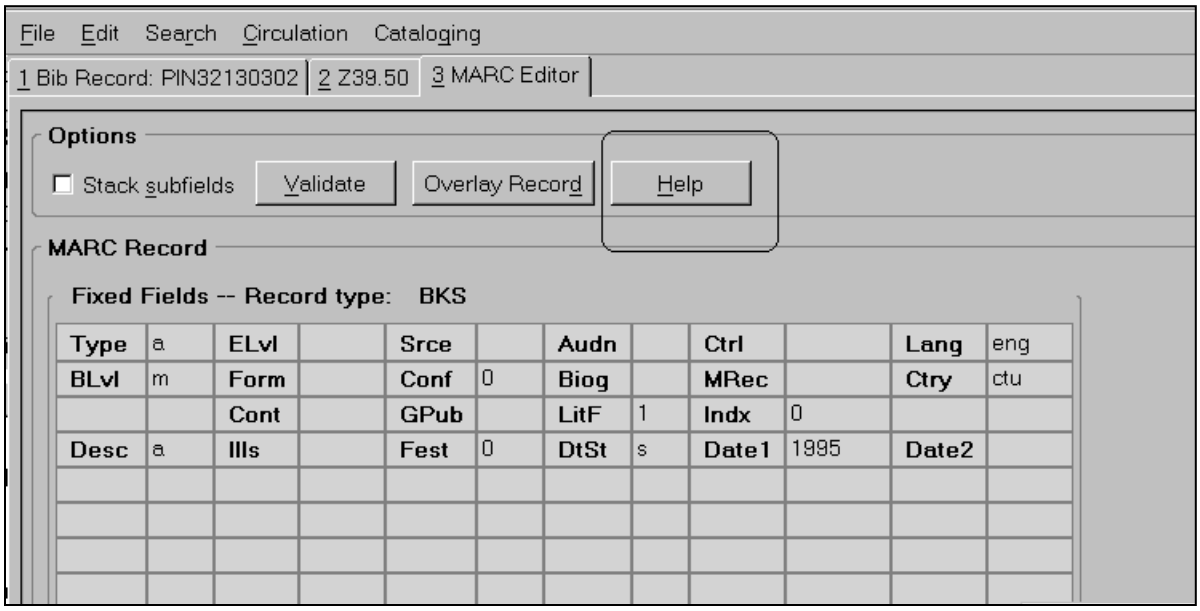
8.4 Editing MARC (Title) Records

Follow PINES cataloging policies and procedures, along with national standards for decisions on editing information in the MARC record. If you are importing a record, the **MARC Editor** is open at import. If you are editing an existing PINES record, open the record in **MARC Edit** view:

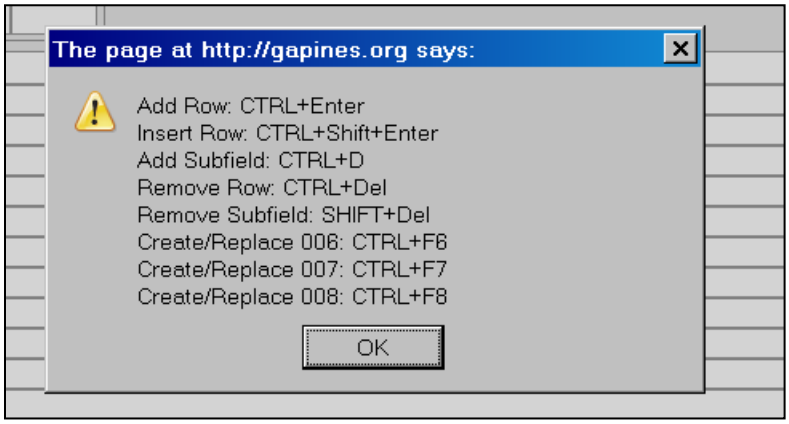


8.4.1 Navigating the MARC editor

Keyboard commands for manipulating rows, subfields and other functionality for the **MARC Editor** can be found at the **Help** button (**CTRL H**):



A dialog box opens with the commands you will need to use while editing a MARC record:

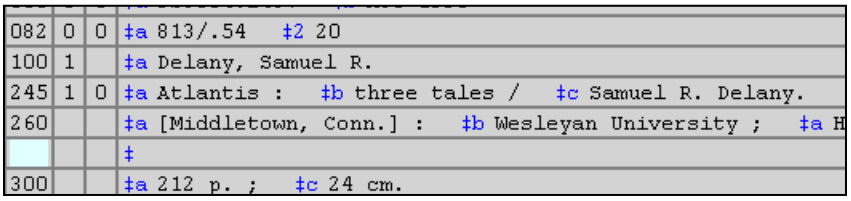


8.4.1.1 Keyboard commands

The keyboard commands are:

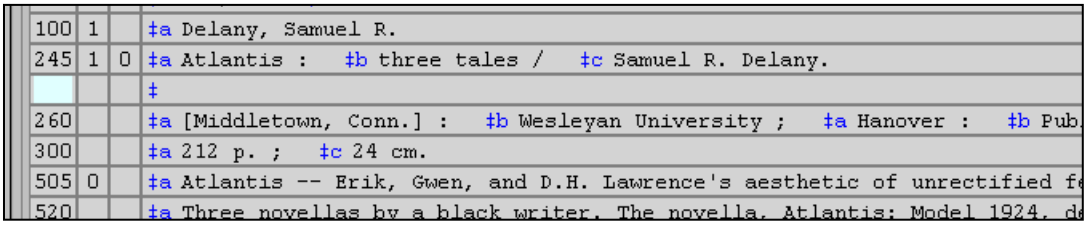
Add Row: **CTRL** + **Enter**

Inserts a blank field under the row highlighted



Insert Row: **CTRL +SHIFT + Enter**

Inserts a blank field above a field highlighted



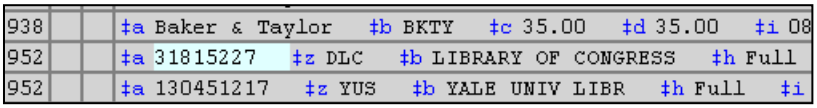
Add Subfield: **CTRL D**

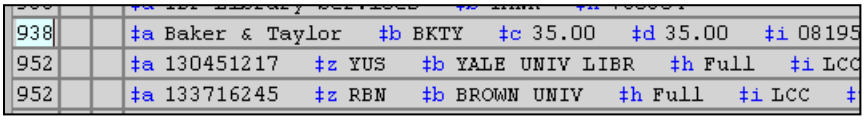
Adds the subfield delimiter and a blank subfield to an existing row:

Fill in the subfield code and tab over to enter values in the subfield box

Remove row: **CTRL + Del**

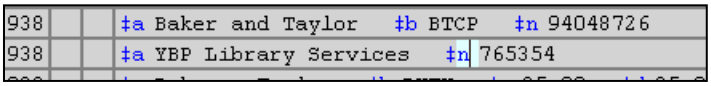
Deletes the entire field





Remove subfield: **SHIFT + Del**

Deletes just the subfield



938			‡a Baker and Taylor ‡b BTCP ‡n 94048726
938			‡a YBP Library Services
938			‡a Baker & Taylor ‡b BKTY ‡c 35.00 ‡d 35.00

Create/Replace 006: **CTRL + F6**

In development as of release 1.4.0.7.

Create/Replace 007: **CTRL + F7**

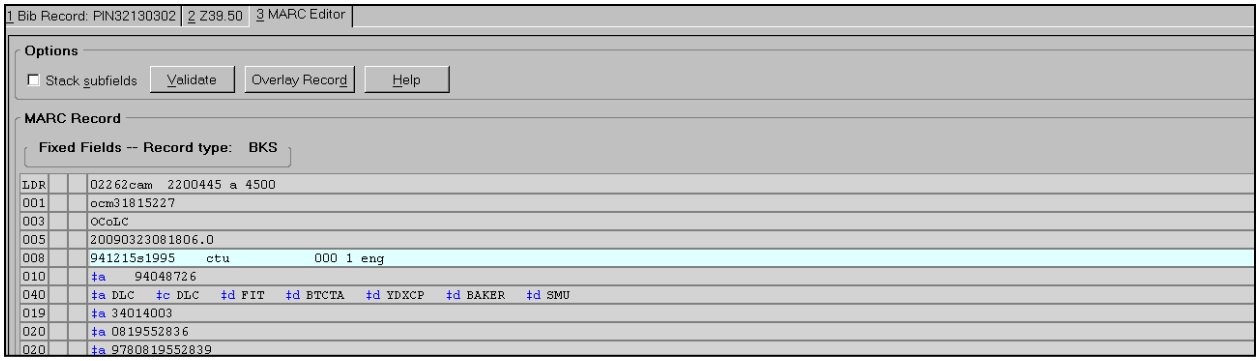
In development as of release 1.4.0.7.

Create/Replace 008: **CTRL + F8**

In development as of release 1.4.0.7.

8.4.1.2 Editing the fixed fields

The default display for the fixed fields is the MARC21 fields LDR and 008.

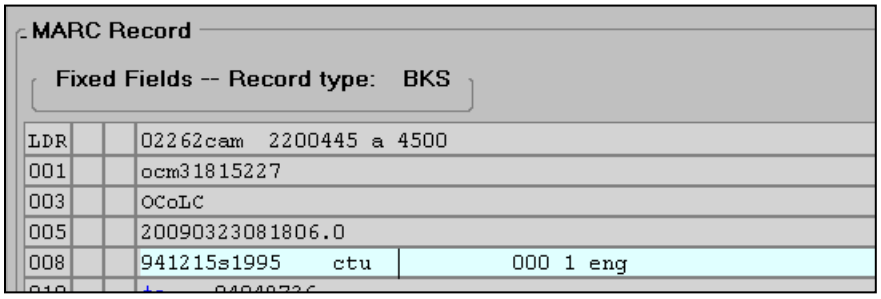


You cannot directly edit leader (LDR) information from this display. You can directly edit the 008. With your cursor in the correct area, make the necessary corrections. Since insert is always on in the **MARC Editor**, you must remember to delete any extra spaces added when you edit information.

More information on LDR and 008 positions can be found at

OCLC (2010) Bibliographic formats and standards, 4th ed. Retrieved June 7 2010 from http://www.oclc.org/bibformats/default.htm

Library of Congress. Network Development and MARC Standards Office. (2010) MARC Standards. Retrieved June 7 2010 from http://www.loc.gov/marc/



If you highlight the fixed field to be changed, you can replace rather than insert:

LDR			02262cam 2200445 a 4500
001			ocm31815227
003			OCoLC
005			20090323081806.0
008			941215s1995 ctu 000 1 eng
010			‡a 94048726

An OCLC type grid is available in Evergreen. It is easier to edit the fixed field from this grid since it automatically puts the information in the correct positions in the 008 and allows you to edit some LDR information. To access the OCLC type grid display of the leader and 008 fields, place your cursor on the label **Fixed fields – record type** and double-click your left mouse button:

MARC Record

Fixed Fields -- Record type: BKS

LDR			02262cam 2200445 a 4500
001			ocm31815227

The grid will appear and remain for subsequent login sessions (to change back, double-click on the same label as above).

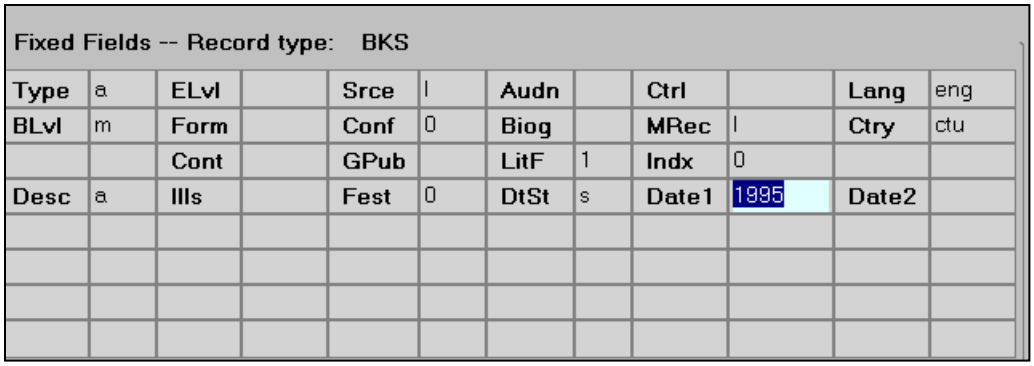
MARC Record

Fixed Fields -- Record type: BKS

Type	a	ELvl		Srce		Audn		Ctrl		Lang	eng
BLvl	m	Form		Conf	0	Biog		MRec		Ctry	ctu
		Cont		GPub		LitF	1	Indx	0		
Desc	a	Ills		Fest	0	DtSt	s	Date1	1995	Date2	

LDR			02262cam 2200445 a 4500
001			ocm31815227
003			OCoLC
005			20090323081806.0
008			941215s1995 ctu 000 1 eng

Any changes you make in the grid will automatically apply to the LDR and 008 fields in the record body. To make changes to the individual fields, highlight the field area in the box to the right of the label, and type your changes. If the box is blank, you can enter information. Make sure your cursor is in the correct position so that the system will record your keystrokes.

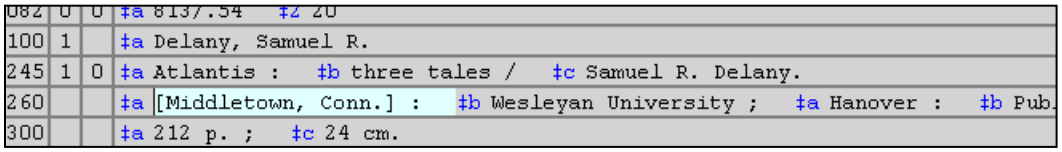


Fixed Fields -- Record type: BKS

Type	a	ELvl		Srce	|	Audn		Ctrl		Lang	eng
BLvl	m	Form		Conf	0	Biog		MRec	|	Ctry	ctu
		Cont		GPub		LitF	1	Indx	0		
Desc	a	Ills		Fest	0	DtSt	s	Date1	1995	Date2	

8.4.1.3 Editing the Variable fields

In order to make changes to the variable fields, your cursor must be in the field tag, indicator or subfield area:

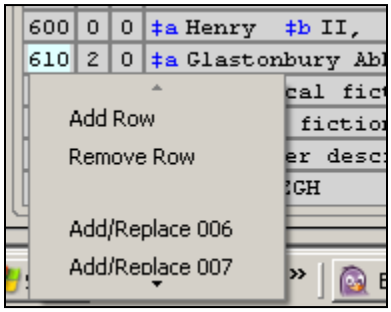


```
082 0 0 ‡a 813/.54   ‡2 20
100 1   ‡a Delany, Samuel R.
245 1 0 ‡a Atlantis :   ‡b three tales /   ‡c Samuel R. Delany.
260     ‡a [Middletown, Conn.] :   ‡b Wesleyan University ;   ‡a Hanover :   ‡b Pub.
300     ‡a 212 p. ;   ‡c 24 cm.
```

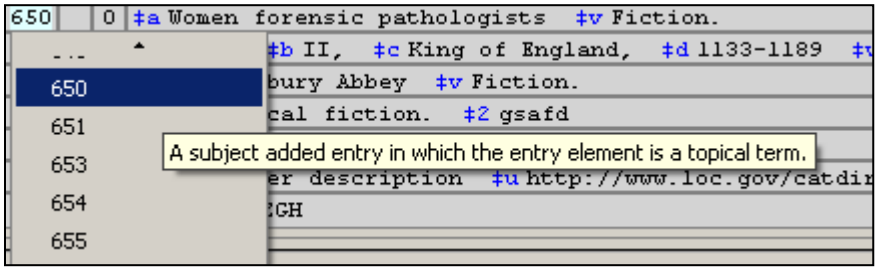
You can use the tab key to move between subfields.

Fields do not wrap, so you need to scroll using the scrollbar at the bottom of the screen to see the entire field. Some editing may be easier if you copy and paste the information into a word processing program and then paste back into Evergreen.

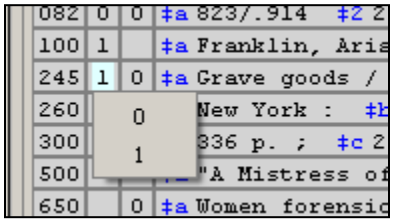
Right clicking in the entry well for the field tag brings up a list of options for editing the line. You can add and remove rows from this dialog box in addition to adding 006, 007, and 008 fields.



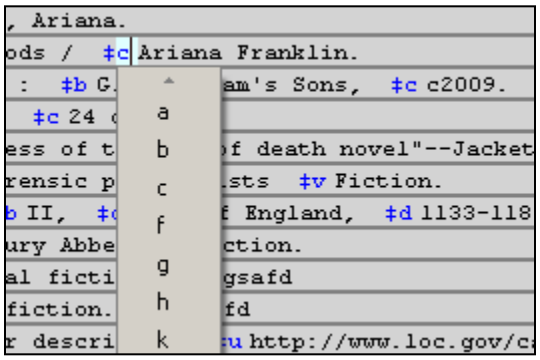
Scrolling down in the dialog box brings up a list of field tags you can insert or replace. Hovering your cursor over the tag provides a brief description of the field:



Right clicking in the indicator data entry wells provides you with a list of values specific to that field. Clicking on the value inserts or replaces it in the data well. You can also enter a value directly.



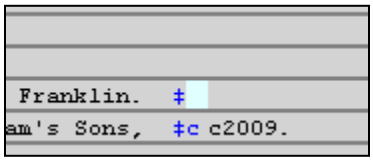
Right clicking after the subfield delimiter sign provides you with a list of subfield letter values specific to that field. Scroll up or down to find the correct value or enter it directly.



You can enter or edit information in the data wells for the field. Make sure your cursor is in the correct spot and delete, add, copy or paste as needed. Make sure you follow national and PINES standards for editing and inputting MARC fields.

Subfields are entered using the subfield delimiter and the corresponding value for the subfield. The delimiter is entered using the keyboard command **CTRL D**.

NOTE: Do not leave empty subfield data wells or delimiters with no value in the record. Their presence can adversely affect indexing, OPAC display of the record and the batch extraction of records.



You can copy, cut, and paste from other applications or from within Evergreen into the **MARC Editor**. Subfield delimiters must be entered using the keyboard commands and cannot be read by the software if pasted, even from **MARC View** in Evergreen. You can paste the entire field from the **MARC Editor** or from OCLC's WorldCat and go back to enter the delimiters in the correct locations, deleting the ones pasted in with the other information. Note that the delimiter and pasted subfield code are not in blue:

500			‡a Series title from slipcase.
500			‡a Issued in a case with the author's No
650		0	‡a City and town life ‡vFiction.
800	1		‡a Delany, Samuel R. ‡t Galaxies.

500			‡a Issued in a case with the author's Nov
650		0	‡a City and town life ‡v Fiction.
800	1		‡a Delany, Samuel R. ‡t Galaxies.

When you paste into Evergreen, only the end of the information is initially visible in the field input well:

490	0		‡a Bantam science fiction
650		0	‡a City and town life ‡v F
655		7	‡a on.

Use the Home button on your keyboard, or begin typing in the row so that Evergreen will display the entire row.

Or you can paste each subfield, inputting the delimiter and subfield code as you go. Remove any added spaces at the end or beginning of the subfields.

There is no undo function in Evergreen. You can close the **MARC Editor** without saving and bring up the record in **MARC Editor** again to start editing over again if you need to.

8.4.1.4 Adding and editing control fields 006 and 007.

In order for them to be correctly formatted and placed in the MARC record, control fields such as 006 and 007 cannot be added using the same methods as data fields. When an OCLC record with these control fields is imported into the PINES database, they are correctly formatted, so you need to do nothing other than make sure the values are accurate. It is strongly advised to add any missing control fields in OCLC before importing the record into the PINES database. However, if you are unable to do so, and must add these fields to a record after or as it is being brought into PINES you will need to use the drop down menu in the **MARC Editor** and not adding a row as you would other fields.

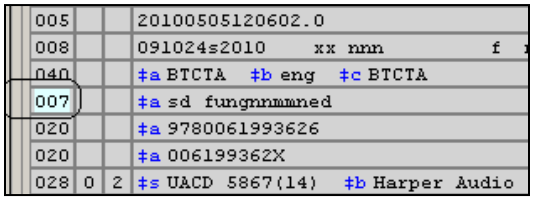
8.4.1.4.1 Correcting a 007 entered as a data field.

The presence of a delimiter and subfield as well as the position of the field in the MARC record will indicate that the 007 has been entered as a data field and not a control field. These fields need to be corrected in order for the 007 to function properly.

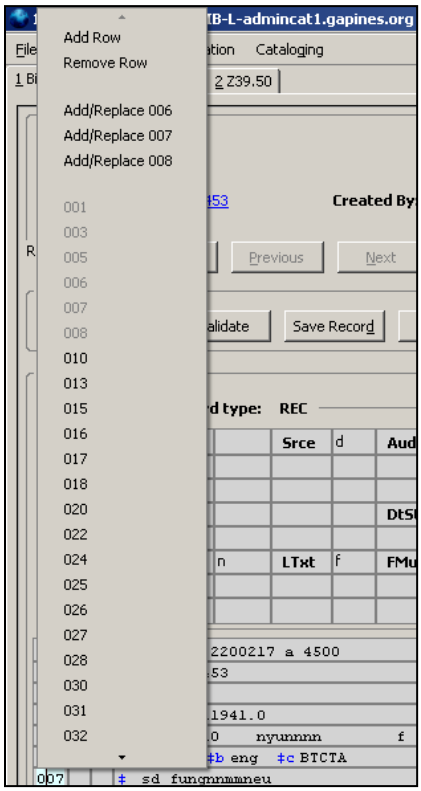
Note the placement and appearance of the 007 entered as a data field in the record below:

```
LDR 00537nim 2200205 4500
001 ocn460060869
003 OCoLC
005 20100505120602.0
008 091024s2010 xx nnn f n eng d
040     ‡a BTCTA ‡b eng ‡c BTCTA
007     ‡a sd fungnnmmned
020     ‡a 9780061993626
020     ‡a 006199362X
028 0 2 ‡s UACD 5867(14) ‡b Harper Audio
035     ‡a (OCoLC)460060869
043     ‡a nwht--- ‡a cc-----
100 1   ‡a Allende, Isabel.
240 1 0 ‡a Isla bajo el mar. ‡l English
245 1 0 ‡a Island beneath the sea ‡h [sound recording] / ‡c Isabel Allende.
260     ‡a [S.l.] : ‡b Harper Audio, ‡c p2010.
300     ‡a 14 sound discs (16 hr.) : ‡b digital ; ‡c 4 3/4 in.
306     ‡a 160000
```

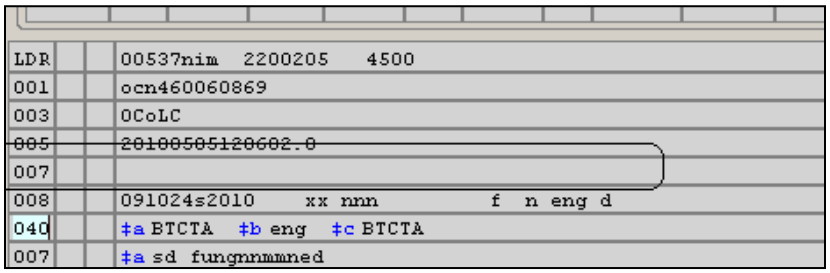
In **MARC Edit**, place your cursor in any tag entry box:



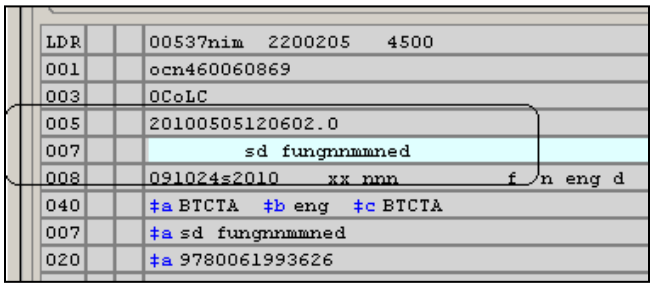
Right click your mouse for the menu:



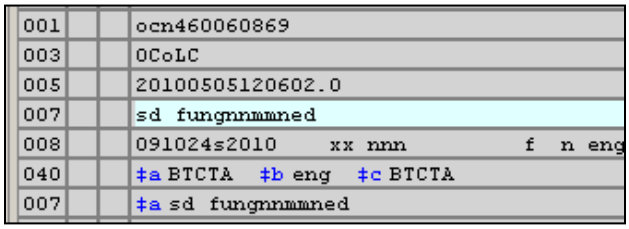
Choose **Add/Replace 007**. A control field will be inserted in the record. If a 007 control field exists in the record, the values will be erased. Note: As of release 1.4.0.7, multiple 007s cannot be entered into a record in Evergreen. If your record requires additional 007s, it is advised that you add them in OCLC before the record is brought into PINES.



If the values in the existing 007 data field are correct, copy them and then paste into the newly created 007:



Delete initial spaces if they were added when you pasted in the values. Highlighting the field, **Select All** from the right click drop down menu, or deleting the spaces before pasting will allow you to place the values within the data entry box correctly.

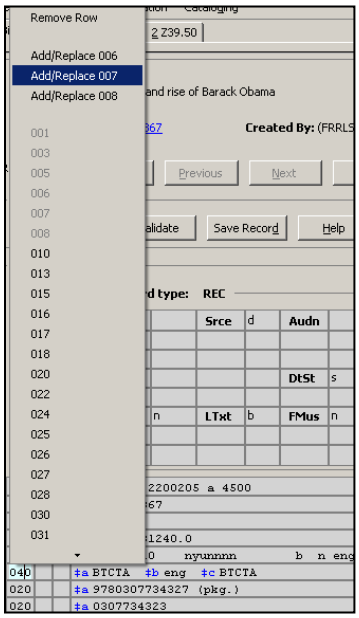


Remove the incorrect 007 and **Save** the record. The 007 will be in the correct location, formatted as a control field:

```
LDR 00537nim 2200205 4500
001 ocn460060869
003 OCoLC
005 20100929180918.0
007 sd fungnnmmned
008 091024s2010 xx nnn f n eng d
040     ‡a BTCTA ‡b eng ‡c BTCTA
020     ‡a 9780061993626
020     ‡a 006199362X
028 0 2 ‡s UACD 5867(14) ‡b Harper Audio
035     ‡a (OCoLC)460060869
043     ‡a nwht--- ‡a cc-----
100 1   ‡a Allende, Isabel.
240 1 0 ‡a Isla bajo el mar. ‡l English
245 1 0 ‡a Island beneath the sea ‡h [sound recording] / ‡c Isabel Allende.
260     ‡a [S.l.] : ‡b Harper Audio, ‡c p2010.
300     ‡a 14 sound discs (16 hr.) : ‡b digital ; ‡c 4 3/4 in.
```

8.4.1.4.2 Adding a 007 to a record:

In **MARC Edit**, with your cursor in a data well, right click for the menu and choose **Add/Replace 007**:



An empty 007 field will be automatically entered into the correct location for the field:

LDR			00560nim 2200205 a 4500
001			ocn548412867
003			OCoLC
005			20100929181240.0
007			
008			100303s2010 nyunnnn b n eng d7
040			‡a BTCTA ‡b eng ‡c BTCTA
020			‡a 9780307734327 (pkg.)
020			‡a 0307734323
024	3		‡a 9780307734327
028	0	2	‡a RHCD 2640 ‡b Random House Audio

With your cursor at the left side of the data well, carefully enter the values, without subfield markers, making sure the positions for the values are correct:

LDR			00560nim 2200205 a 4500
001			ocn548412867
003			OCoLC
005			20100929181240.0
007			sd fungnnmmned
008			100303s2010 nyunnnn b n eng d7
040			‡a BTCTA ‡b eng ‡c BTCTA
020			‡a 9780307734327 (pkg.)
020			‡a 0307734323
024	3		‡a 9780307734327
028	0	2	‡a RHCD 2640 ‡b Random House Audio

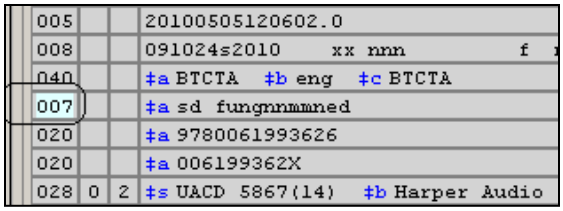
Save your record. The field will be correctly formatted as a control field:

LDR			00560nim 2200205 a 4500
001			ocn548412867
003			OCoLC
005			20100929181945.0
007			sd fungnnmmned
008			100303s2010 nyunnnn b n eng d7
040			‡a BTCTA ‡b eng ‡c BTCTA
020			‡a 9780307734327 (pkg.)
020			‡a 0307734323
024	3		‡a 9780307734327
028	0	2	‡a RHCD 2640 ‡b Random House Audio
035			‡a (OCoLC)548412867
043			‡a n-us---
082	0	4	‡a 973.932092 ‡a B ‡2 22
100	1		‡a Remnick, David.
245	1	4	‡a The bridge ‡h [sound recording] : ‡b the life and rise of Barac
260			‡a [New York] : ‡b Random House Audio, ‡c p2010.
300			‡a 20 sound discs (25 hrs.) : ‡b digital ; ‡c 4 3/4 in.

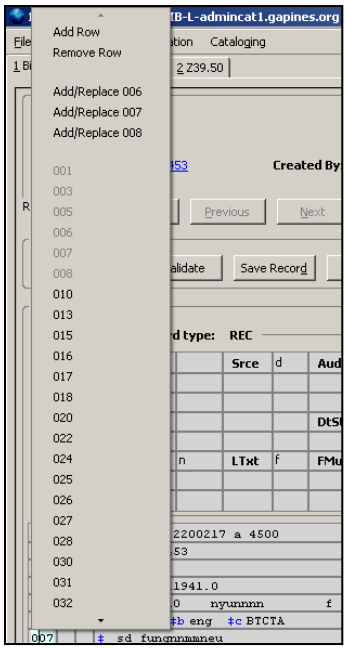
8.4.1.4.3 Correcting a 006 entered as a data field.

As with the 007, the presence of a delimiter and/or subfield as well as the position of the field in the MARC record will indicate that the 006 has been entered as a data field and not a control field. These fields need to be corrected in order for the 006 to function properly. It is strongly recommended that you add the 006 fields to the MARC record in OCLC and then import the record into PINES.

In **MARC Edit**, place your cursor in the tag entry box of a field:



Right click your mouse for a menu:



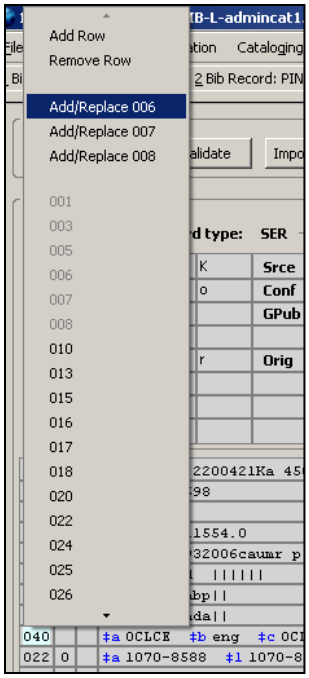
Choose **Add/Replace 006**. A control field will be inserted in the record. If a 006 control field exists in the record, the values will be erased. Note: As of release 1.4.0.7, multiple 006s cannot be entered into a record in Evergreen. If your record requires additional 006s, it is advised that you add them in OCLC before the record is brought into PINES.

If the values in the existing 006 data field are correct, copy them and then paste into the newly created 006. Delete initial spaces if they were added when you pasted in the values. Highlighting the field, **Select All** from the right click drop down menu, or deleting the spaces before pasting will allow you to place the values within the data entry box correctly.

Remove the incorrect 006 and **Save** the record. The 006 will be in the correct location, formatted as a control field.

8.4.1.4.4 Adding a 006 to a record:

In **MARC Edit**, with your cursor in a data well, right click for the menu and choose **Add/Replace 006**:

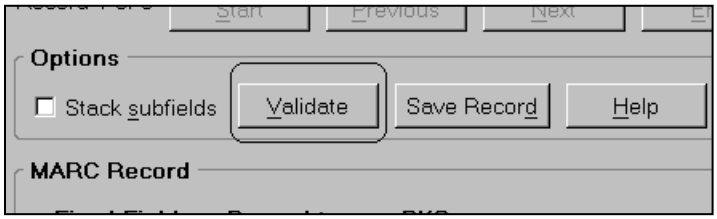


An empty 006 field will be automatically entered into the correct location for the field. With your cursor at the left side of the data well, carefully enter the values, without subfield markers, making sure the positions for the values are correct. **Save** your record. The field will be correctly formatted as a control field.

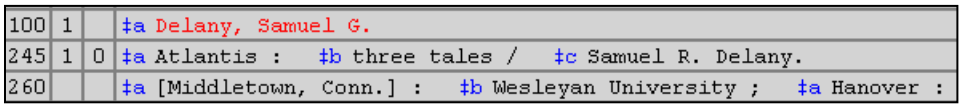
8.4.2 Validating headings (authority control)

Authority control in Evergreen is currently minimal. There is no way to independently search the authority file and we have been unable to add new headings or send our data for authority work to update and correct headings. Controlled headings with dates and other information do not always validate properly. The functionality that is present in Evergreen is within the MARC editor.

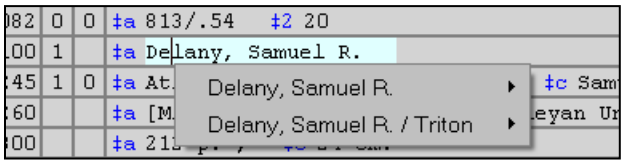
Controlled headings can be validated by clicking on the **Validate** (**CTRL V**) button above the MARC record:



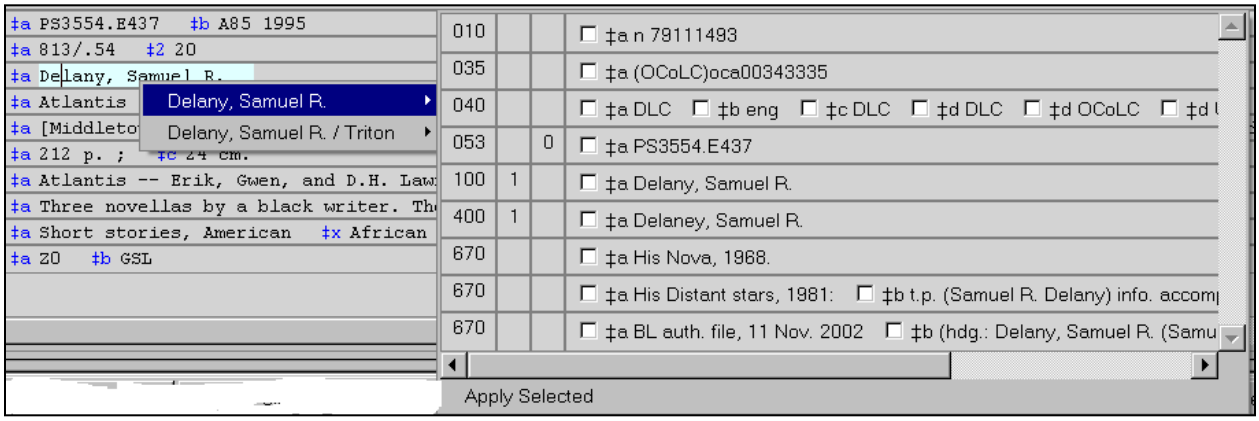
Incorrect headings, or headings not in the PINES authority file, will appear in red after validation:



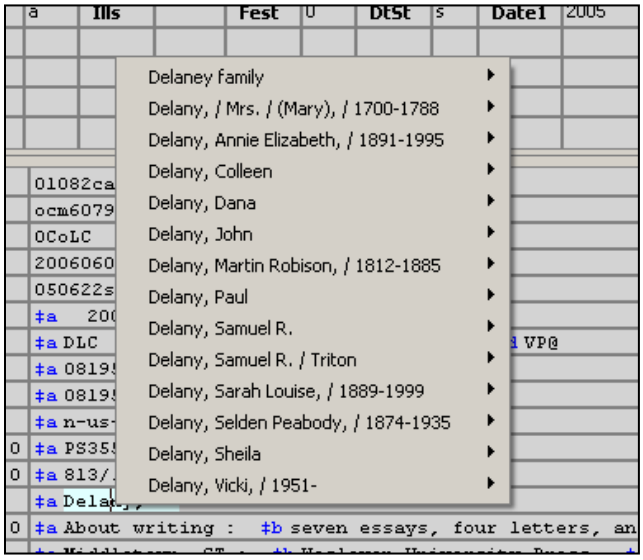
To check the authority file record, with your cursor in the controlled field, right-click with your mouse. A list of possible headings will be displayed:



Choose the authorized heading you need and the authority file heading will be displayed. Check the box by the heading you need and click on **Apply Selected**. If there are subdivisions to the heading, you must check each box to select the complete heading.



You can partially type a name or term and right click for a list of possible matches; however, the list can be incomplete:



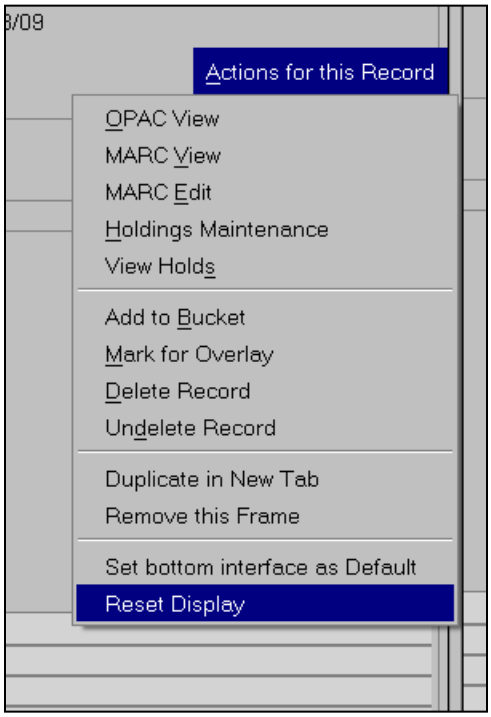
Please note, as of release 1.4.0.7, Evergreen authority control is not complete. Controlled headings with dates do not authorize correctly and there is no way to separately search the authority file. If you cannot locate a heading by the above method, search the authority file in OCLC via the Connexion Client or the Library of Congress authorities at http://authorities.loc.gov/. If you have used an authorized heading from one of these sources,

Evergreen may not validate the headings since the PINES authority file may not be up to date. Use the heading as transcribed in OCLC and the Library of Congress.

8.4.3 Saving edits and the record

In order to apply edits or changes to the record in the PINES database, the record must be saved. When you are ready to apply your edits, click on the **Save** button (**CTRL D**) underneath the **Record Summary**:

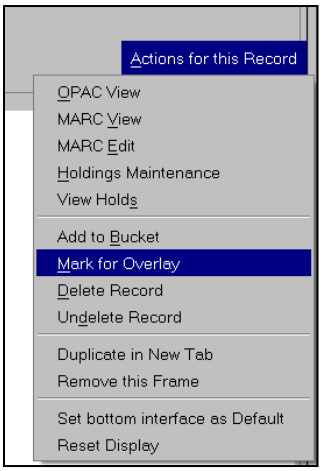
You may wish to display the record in your default view to verify changes. If you have overlain or imported the record, a new tab will automatically display the record in your default view. If you are editing an existing MARC record, you will need to force the redisplay using **Reset Display** under **Actions for this Record**.



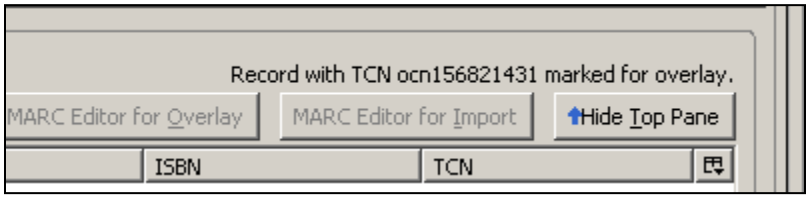
If your changes to the records do not display on reset, try resetting the display again. There can be a lag time in the process that prevents the corrected record from displaying immediately.

8.5 Overlaying Title Records

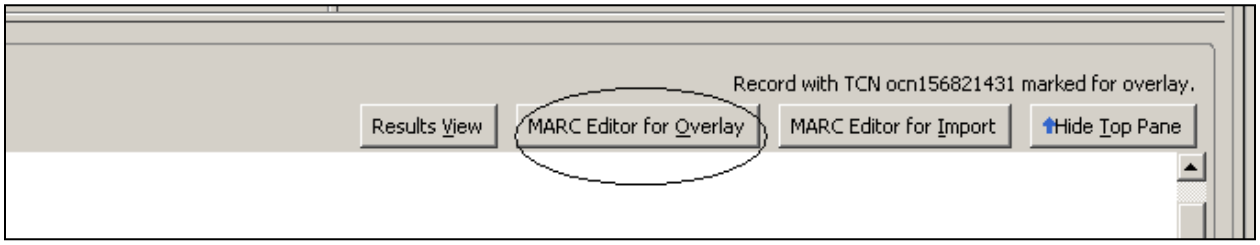
An essential database clean-up function is overlaying existing records in PINES with current records from OCLC. While the most likely reason to overlay is to improve a poor quality record, you will also want to overlay an existing record that does not have an OCLC based TCN or that may have improved subject or name tracing in its current form in OCLC. In general, overlaying also is performed in conjunction with merging duplicate records (see section 8.6). When you have identified a PINES record to be overlaid, you will need to mark if for overlay. In the **Action for this Record** menu, choose **Mark for Overlay** (**CTRL M**)



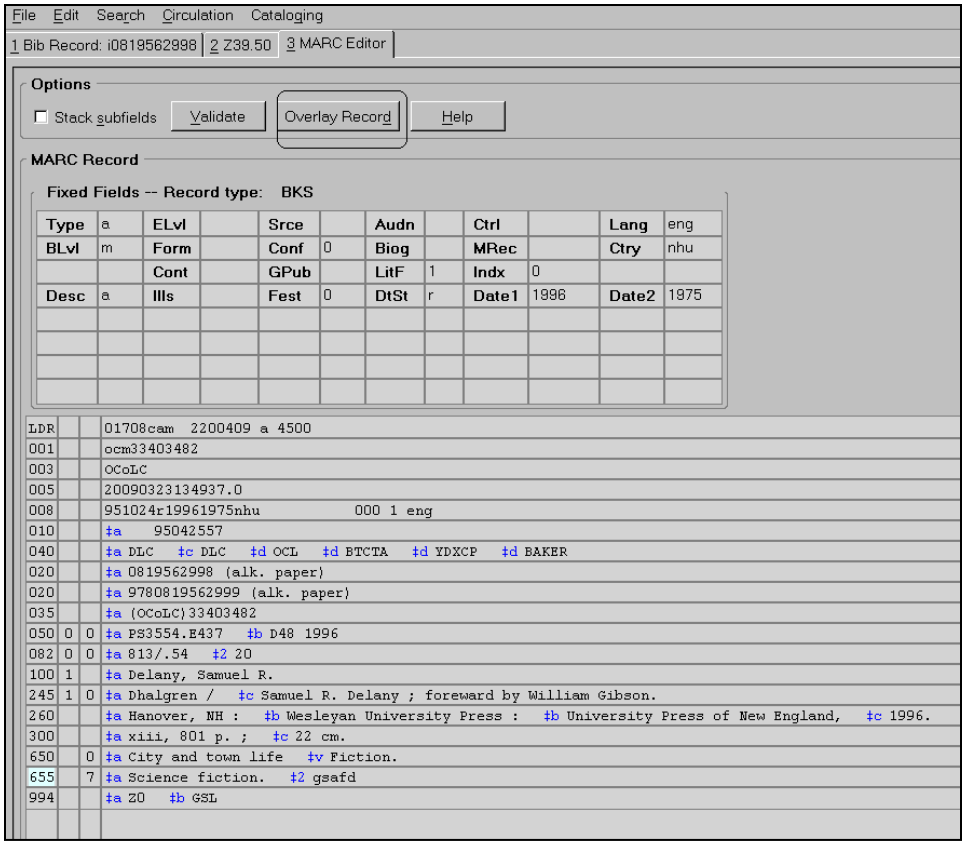
Open a new tab to search OCLC in the Z39.50 gateway and identify a matching OCLC record to overlay. Note that the interface identifies the TCN of the record to be overlaid:



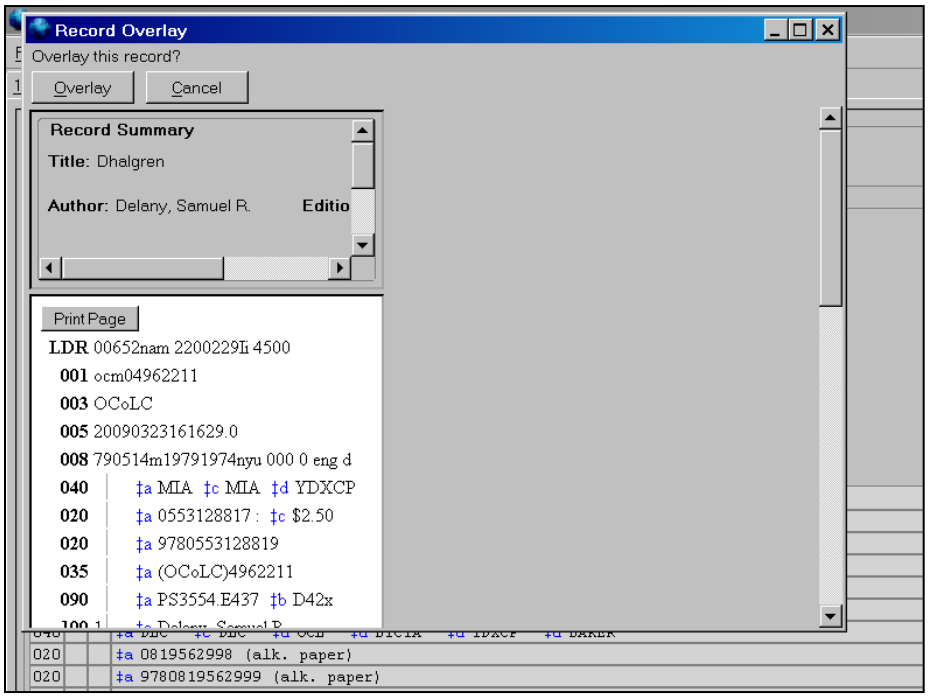
When you have chosen a matching record, click on the **MARC Editor for Overlay** button (**CTRL O**)



The record will open in a **MARC Editor** screen. Make the necessary changes to the record (remember to delete all 029, 938, 948, and 952 fields, retain the 994 field). When you are ready, click on the **Overlay Record** (**CTRL D**) button:



Another box will open with the record from the PINES database to be overlaid:



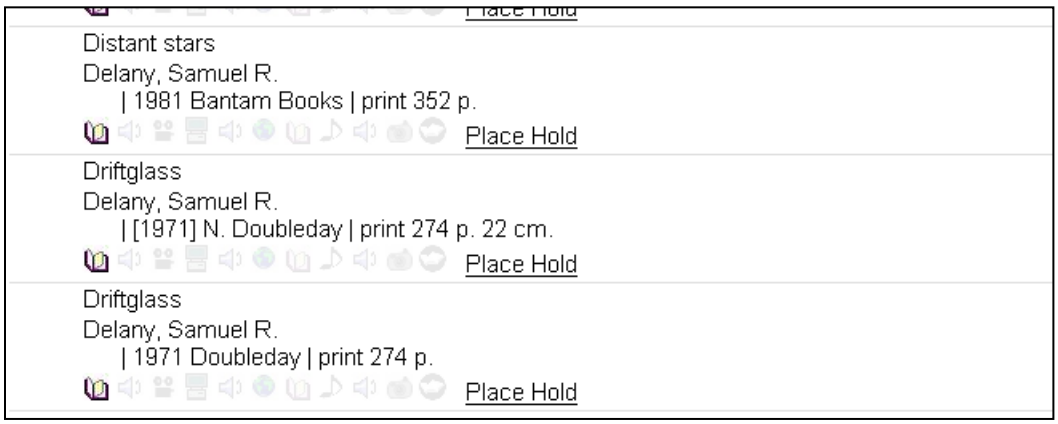
Confirm that this is the correct one. If it is the correct record, click on the **Overlay** button (**CTRL O**). A dialog box will tell you the record was successfully overlaid. Click on **OK.** The record will redisplay in your default view in the same tab as the MARC editor.

If, after you have edited a record for overlay, you discover the incorrect record is about to be overlaid, click on the **Cancel** button (**CTRL C**). Then close the **MARC Editor** tab, find the correct record in the PINES database, and **Mark for Overlay**. Return to the Z39.50 interface and pull up the correct OCLC record in **MARC Editor for Overlay**. Proceed with editing and overlaying record as described above.

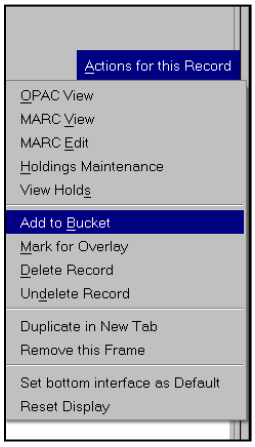
8.6 Merging Title Records

Another essential function to database clean-up is merging duplicate records. Follow PINES policies and procedures to identify duplicate records.

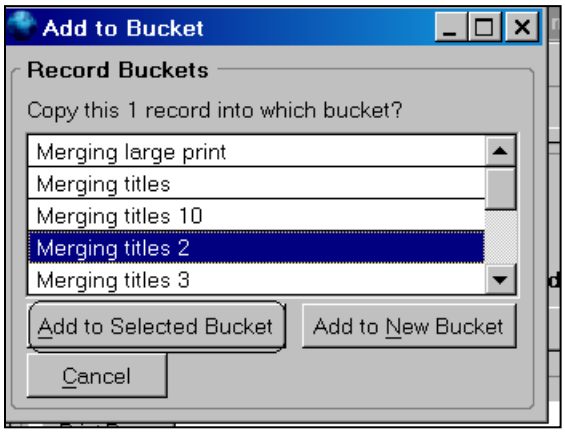
In this list of titles by Samuel R. Delany (displayed in **OPAC View**), Driftglass appears to be a duplicate:



Check each record in **MARC View** to determine if they can be merged. If they can, place each record in a title record bucket. From the **Actions for this Record** menu, choose **Add to Bucket** (**CTRL B**) (more information on using buckets is in the chapter on Using **Buckets** in this manual.)

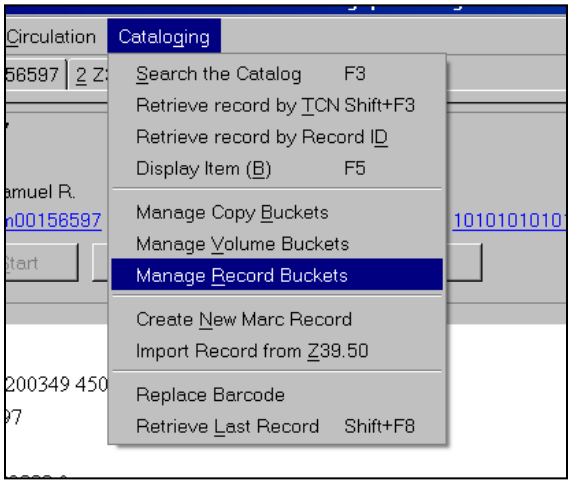


From the **Add to Bucket** dialog box, choose the bucket you use for merging or create a new bucket:

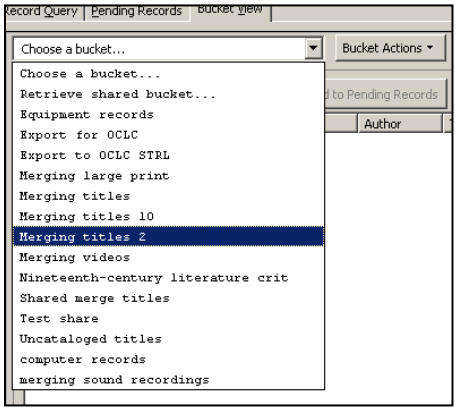


Put each record to be merged in the same bucket. Limit the number of records in a bucket to the amount you can manage.

Open a new tab and, from the **Cataloging** menu, choose **Manage Records Buckets**: (**CTRL R**):

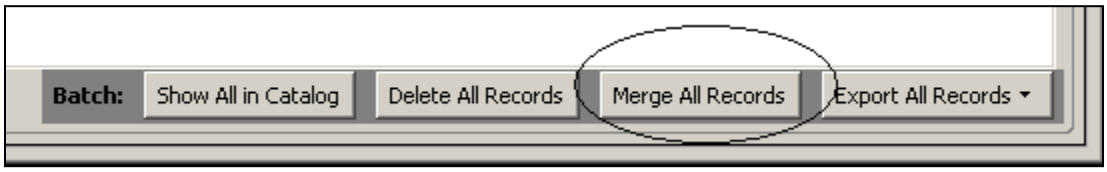


From the drop-down menu **Choose a bucket,** pick the bucket you need:

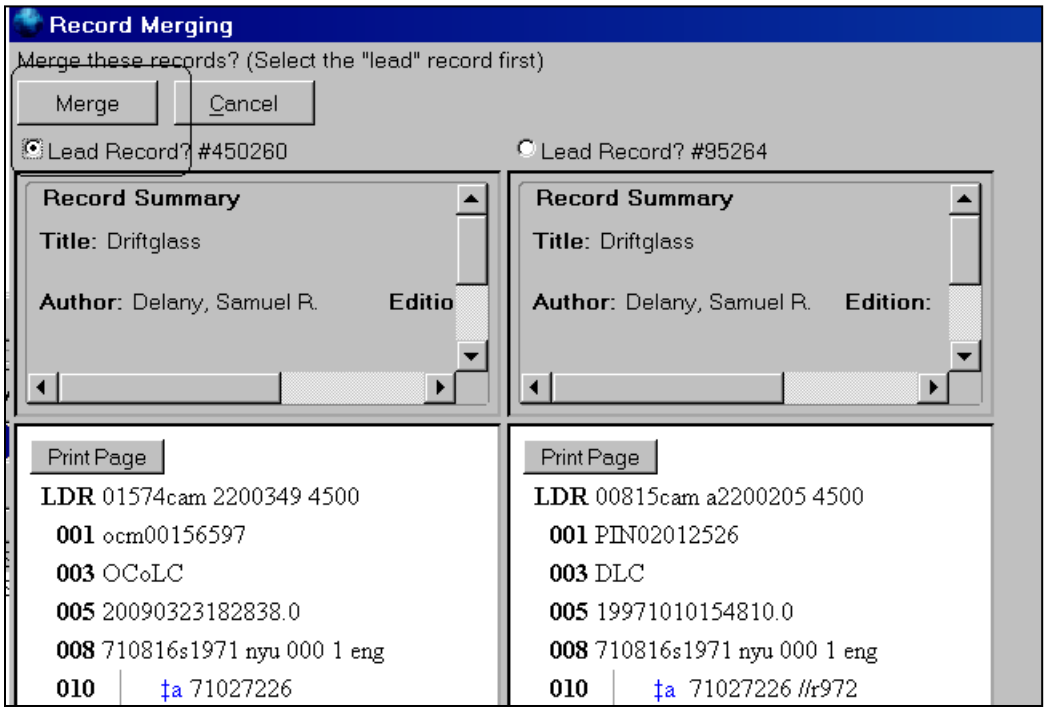


A list of records in that bucket will be displayed (you may need to **Refresh** to display the entire list):

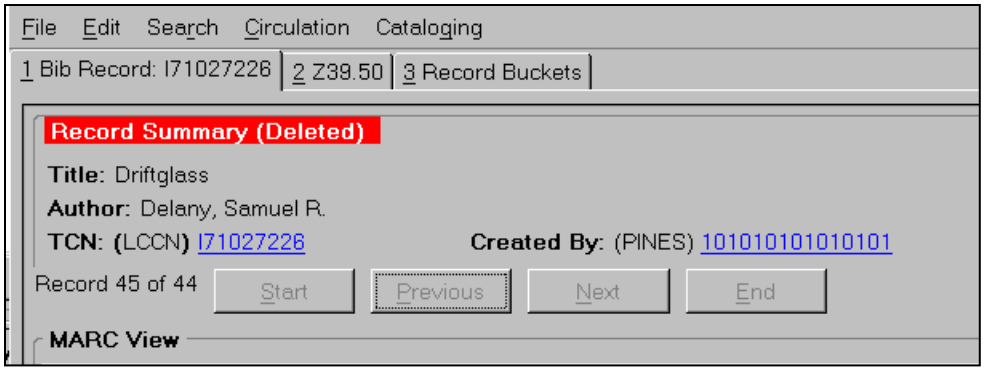
Click on the **Merge All Records** button on the bottom right-hand side of the screen:



The next screen will display your records side-by-side. Confirm they are duplicates, then pick the **Lead** record (the record all others are to be merged with) and click on the radio button for that record, then click **Merge**:



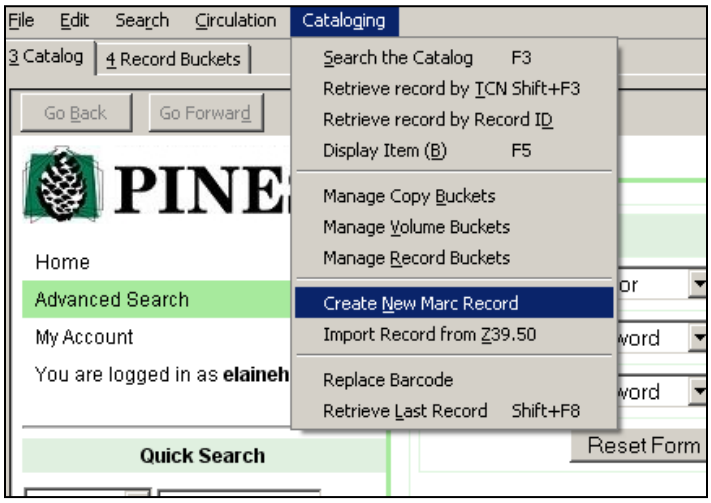
Your records will be merged in the database. However, all the records may still display in the OPAC view until re-indexing occurs. A merged record will have a **Deleted** warning and will have 0/0 holdings attached:



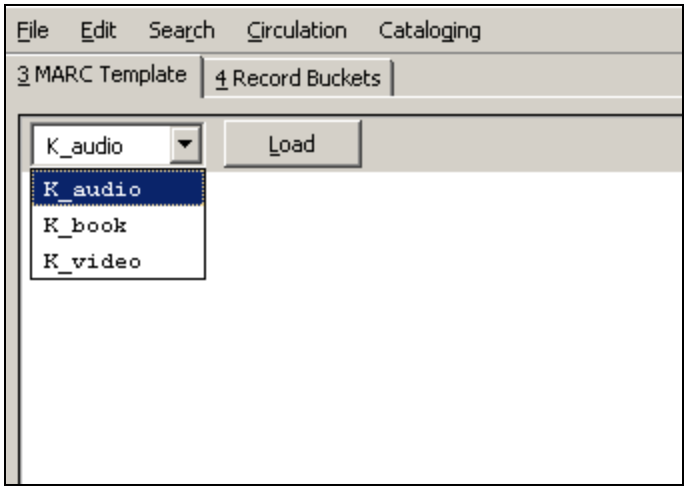
8.7 Creating New Title Records

This function is only used to create K-level records in PINES. For more information, see "Guidelines for Creating K-records in PINES" in the PINES policy manual. PINES catalogers are encouraged to undergo training to create original records in OCLC rather than creating K-Level records in the local database. K-level records should be limited to locally produced or ephemeral items. National and PINES standards must be followed for input. The PINES database and OCLC must be searched thoroughly for a match before the decision is made to input a local record. Cataloging coordinators are responsible for monitoring the quality of records created in their system and for tracking records for eventual addition to OCLC.

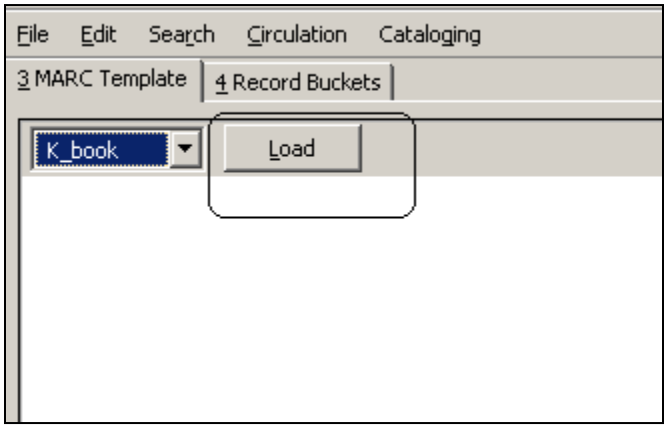
If you have determined that the best course of action is to create a new title record in the local database, open a blank template in the **Cataloging** menu --**Create New MARC Record** (**CTRL N**):



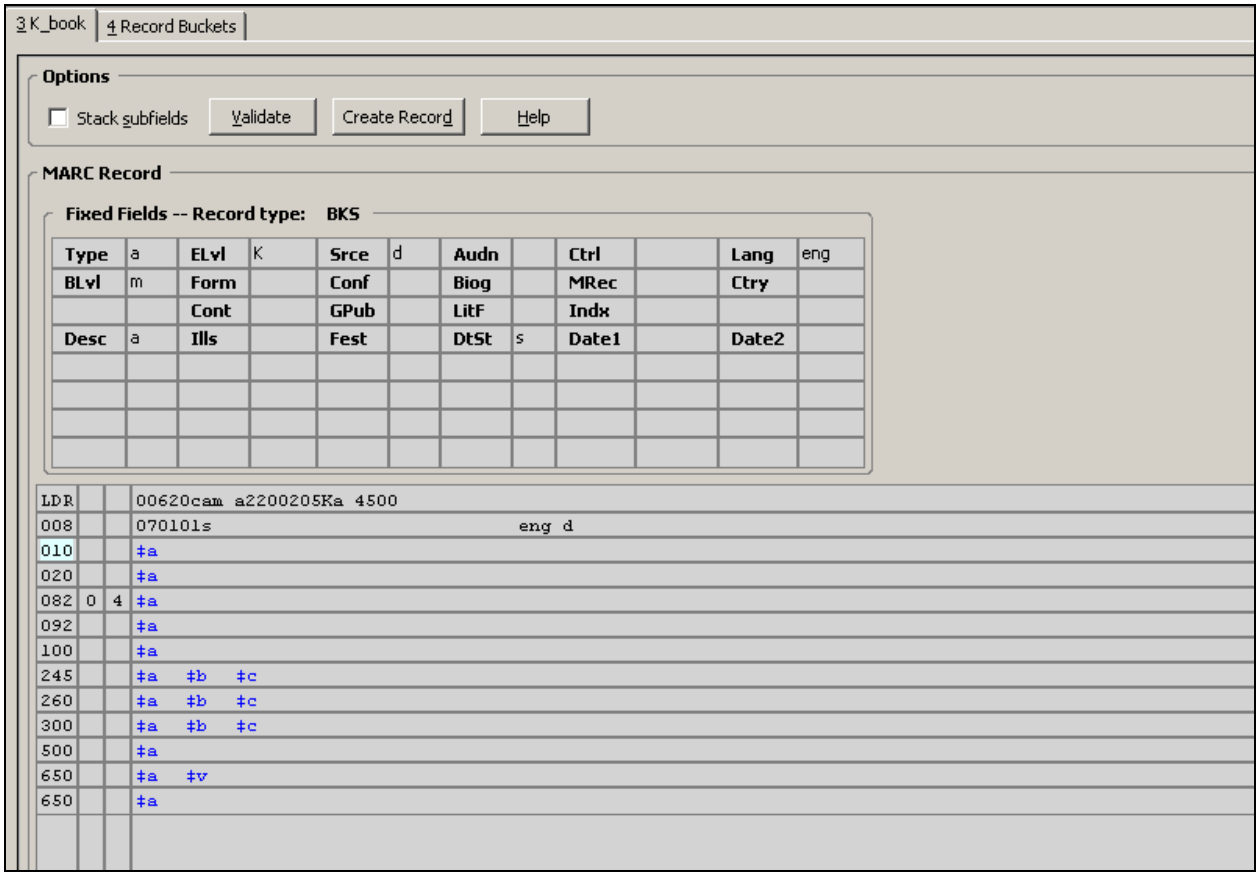
In release 1.4.0.7, there are 3 templates we can use: audio, book, and video. Use the drop-down menu to load the correct template:



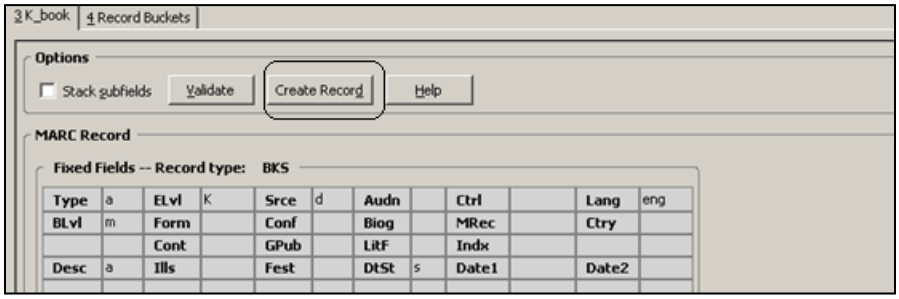
After you choose the template, click on the **Load** button (**CTRL L**)



A blank template in that format will be available:



Complete the record as defined in the PINES standard for creating K-Level records. After you are done, click on the **Create Record** (**CTRL D**) button:



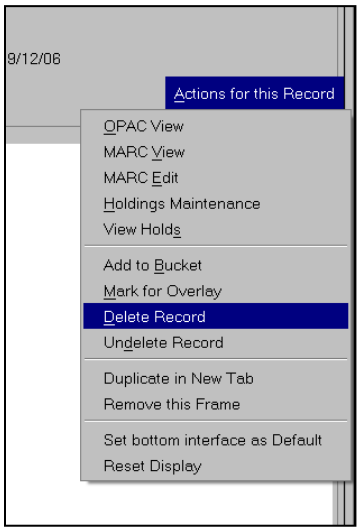
The record will be saved to the PINES database and a system supplied title control number will be assigned.

Note: Do not leave blank fields or subfields in the record.

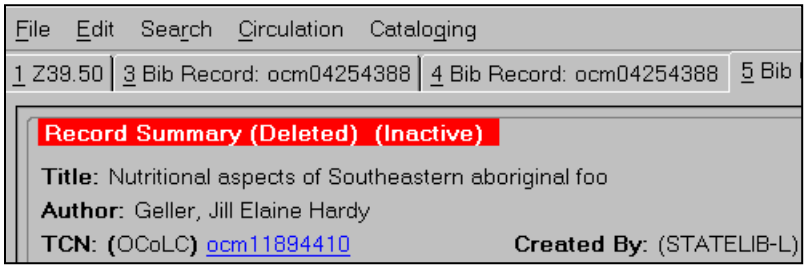
8.8 Deleting Title Records

While deleting the last item attached to a title record should effectively delete the record, you may need to delete a bibliographic record that has no items attached. For example, you import the wrong record from OCLC. You can overlay the correct record or you can delete the incorrect

record. Bring up the record in the database. From the **Actions for this Record**, choose **Delete Record** (**CTRL D**):



You will be asked to confirm the action. Be sure to check the box and then click on the **Delete** button. The record will redisplay with a note at the **Record Summary** that it is deleted.

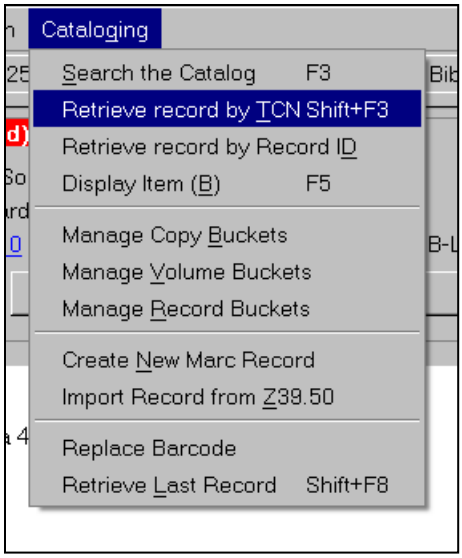


8.9 Batch Delete Title Records

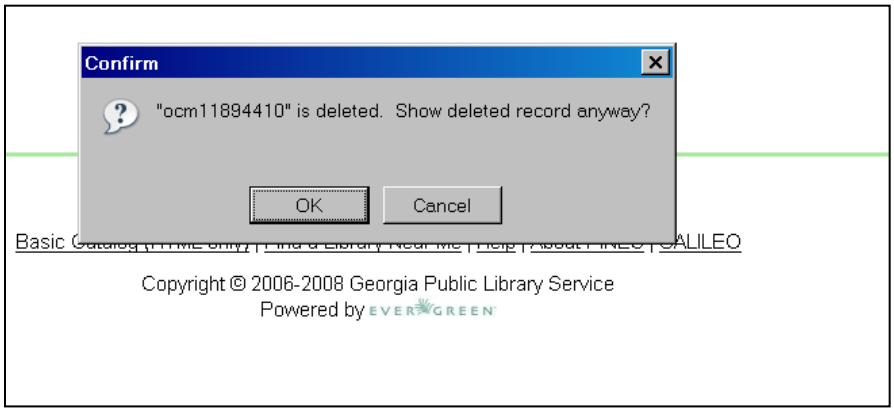
Title records can be deleted in batch through the **Manage Record Bucket** interface. Please see the chapter on Using **Buckets** for details.

8.10 Un-deleting Title Records

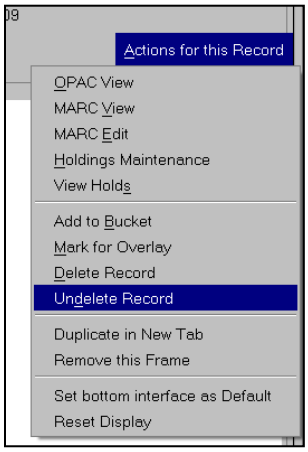
If you mistakenly delete a title record, you can restore it. Records deleted in the database are not really deleted. They are made unsearchable except by title control number from the **Cataloging** menu (**SHIFT + F3**):



A dialog box will ask if you want to retrieve the record, click on **OK**:



Under the **Actions for this Record** menu, choose **Undelete Record** (**CTRL D**, twice):



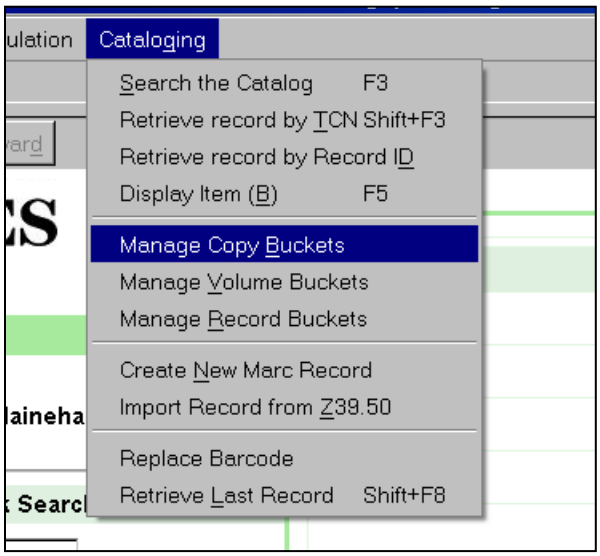
You will get a confirmation box that will require you to both check the box to confirm the action and click on the **Undelete** button to restore the record.

Chapter 9 Using buckets

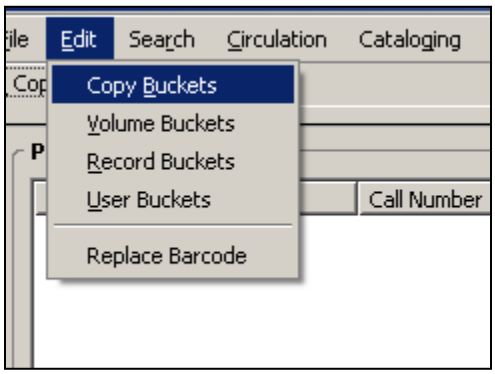
In the Evergreen staff client, buckets are virtual containers that hold items or title records for batch processing. Record buckets allow for merging duplicate records and deleting several records at one time. With copy buckets, catalogers can transfer multiple copies to the same volume, edit item attributes in batch, and delete copies in batch. As of release 1.4.0.7, the **Manage Volume Buckets** interface is under development.

9.1 Copy bucket basics

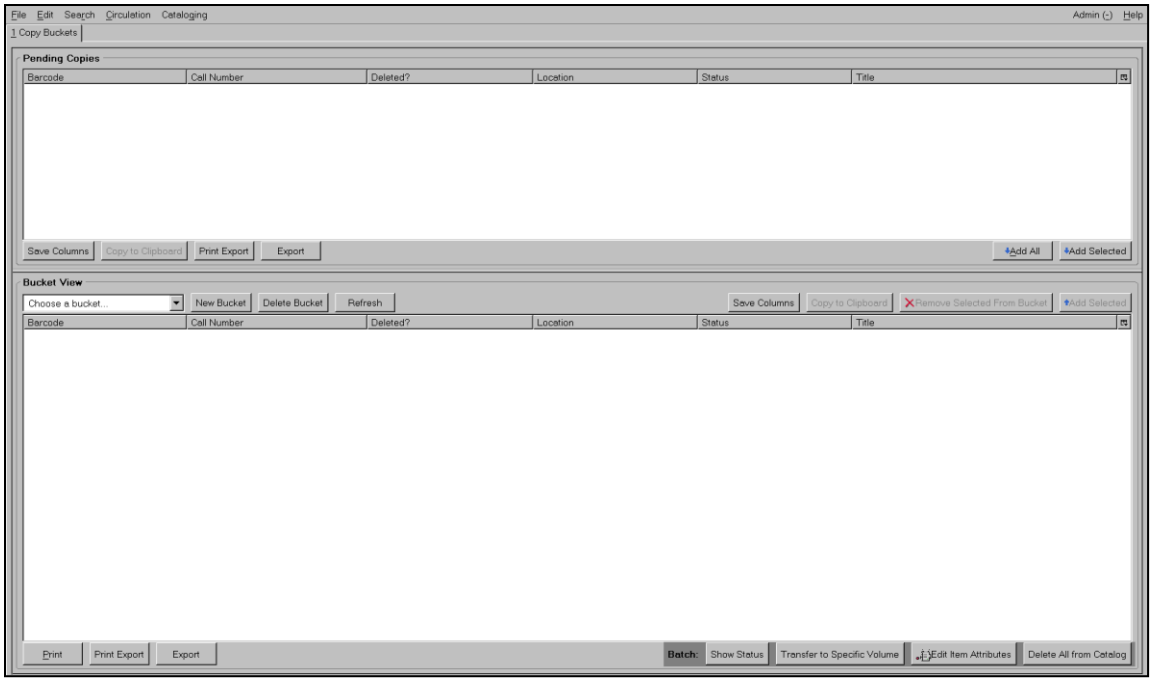
Copy buckets can be used to batch process items or to collect items to be batch processed in the **Item Status** interface (**F5**). The **Copy Bucket** interface is accessed from the **Cataloging** menu- **Manage Copy Buckets** (**CTRL B**):



Or from the **Edit** menu:

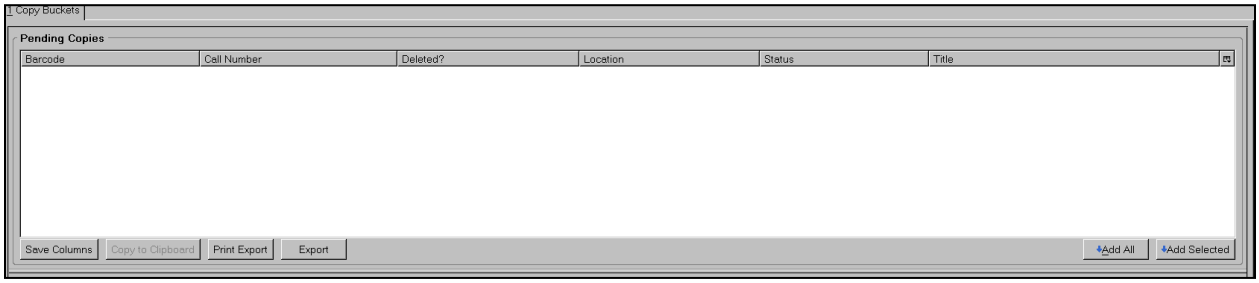


From here, you can create new buckets, delete buckets, and process the copies in buckets. The interface is divided into two sections, **Pending Copies** and **Bucket View**:

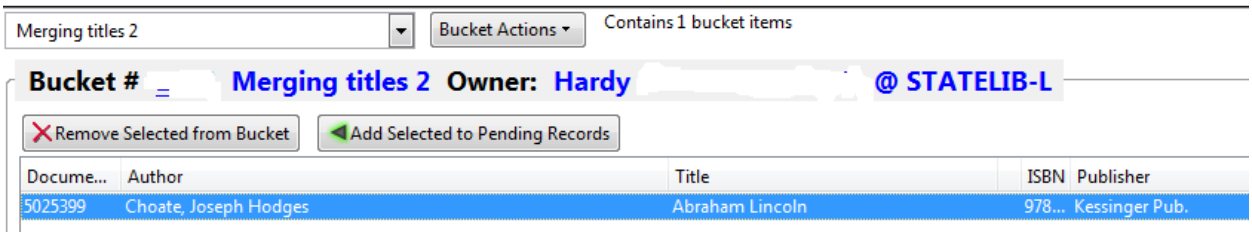


9.1.1 Pending Copies (moving items between buckets)

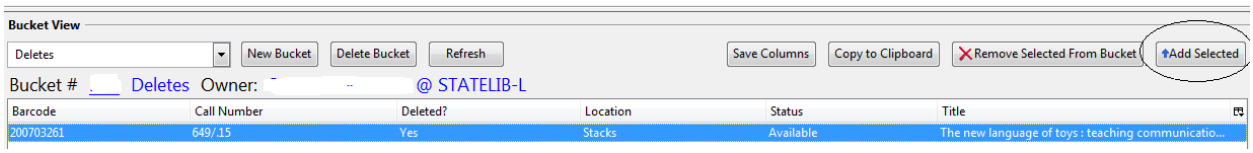
The **Pending Copies** area allows you to "park" copies in order to move them from one bucket to another. You can only add to this area from an existing bucket.



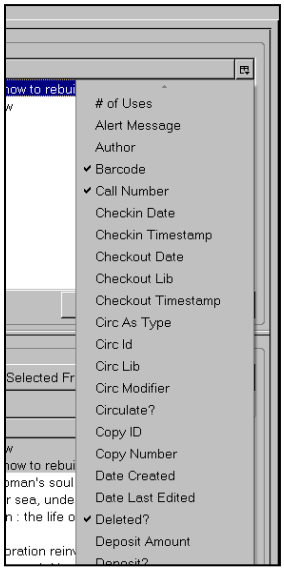
For a **Record Bucket**, highlight the record or records you want to move and click on the **Add Selected to Pending Records** button:



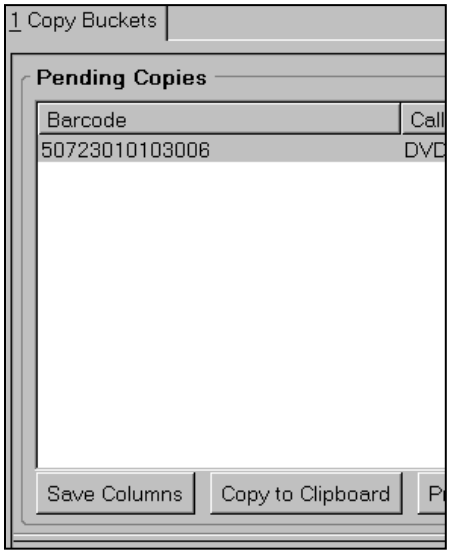
For copy buckets, highlight the records you wish to move and click on the **Add Selected** button on the far right of the screen:



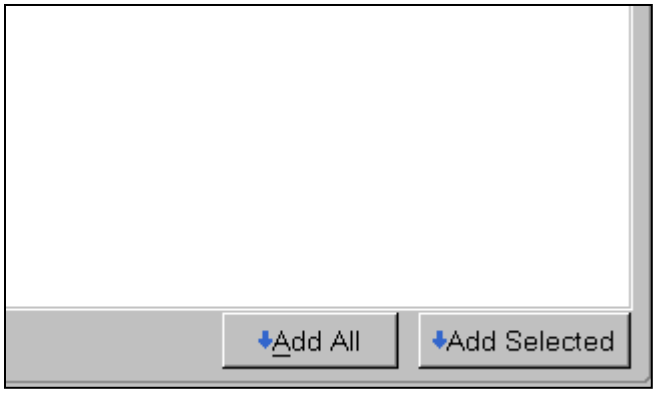
You can customize your view of the item using the column picker:



After you have chosen the elements you want displayed, click on the **Save Columns** button:



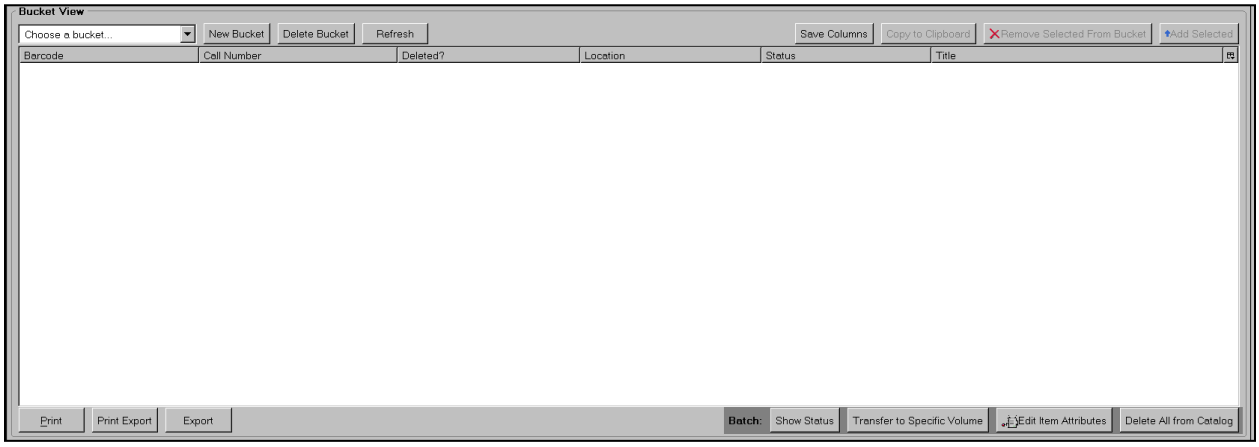
Once you have added copies to the pending area, you can move between buckets and add the copies to other buckets using the **Add All** or **Add Selected** buttons on the lower right section of the **Pending Copies** area:



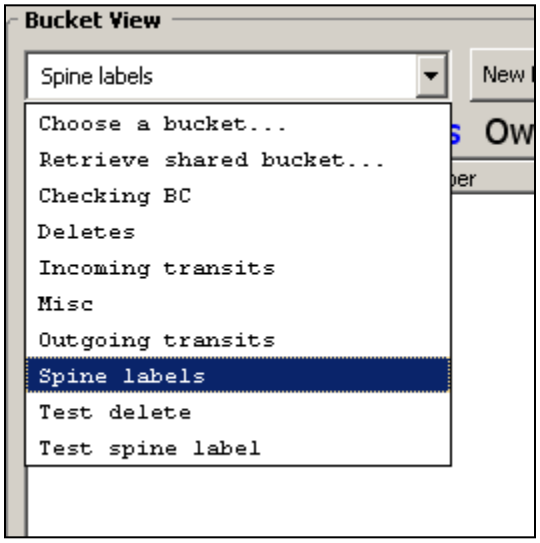
To clear the section, re-load the copy bucket manager from the **Cataloging** menu.

9.1.2 Bucket view

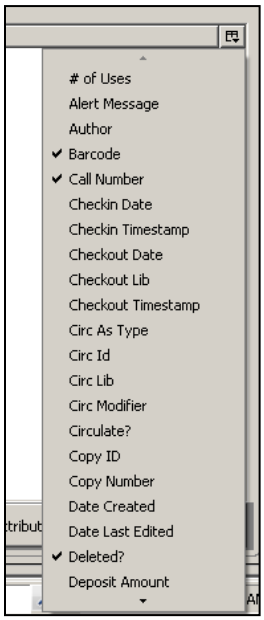
The **Bucket View** is the part of the interface where the buckets and their contents reside. From here you can create new buckets and process the items in the buckets.



The drop-down menu contains the list of buckets already created.



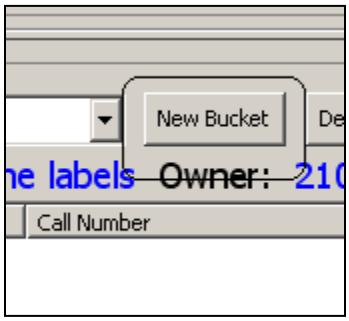
You can use the column picker to customize the display of attributes for items in your buckets:



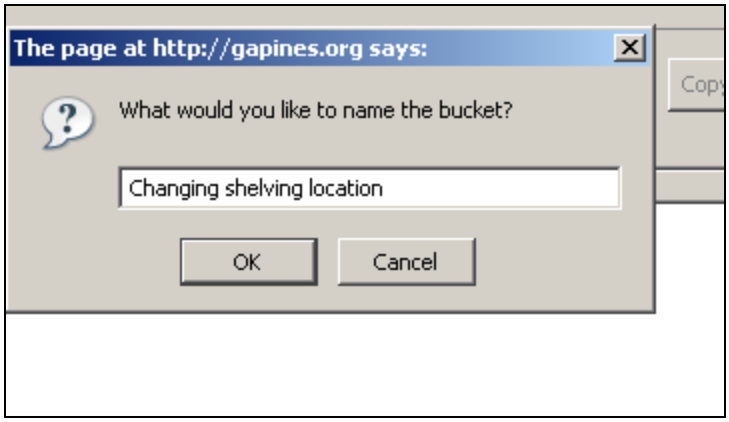
And you can arrange the columns as in other similar interfaces in Evergreen by grabbing the header and moving or re-sizing it. Be sure to click on the **Save Columns** button to save your choices for future sessions.

9.1.2.1 Creating copy buckets

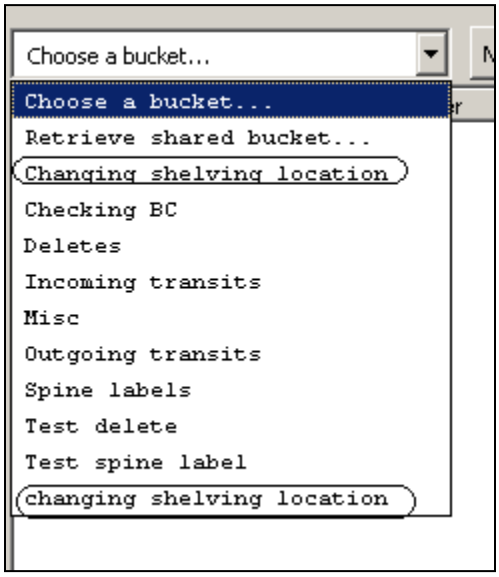
You can create new buckets from the interface. Click on the **New Bucket** button:



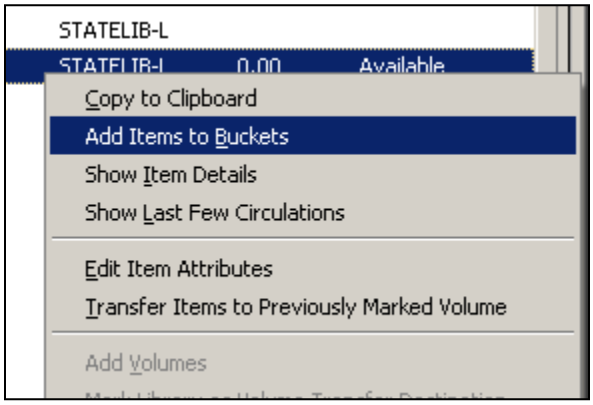
Use a distinctive, explanatory name for the bucket:



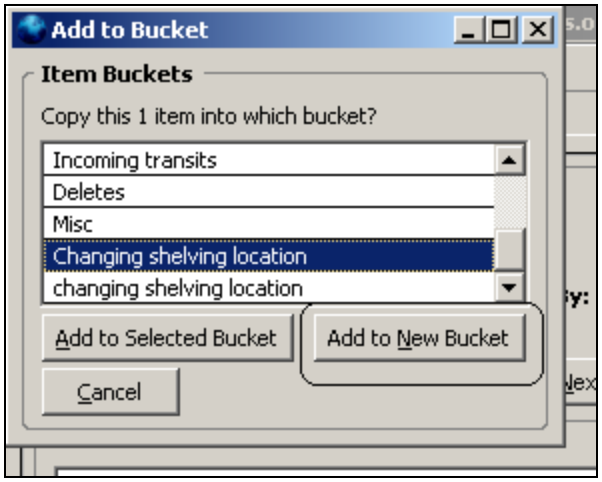
You cannot reuse names. However, the bucket interface is case sensitive, so you can have the same name in different case:



You can also create a copy bucket from **Holdings Maintenance**. With an item or items highlighted, choose **Add Items to Buckets** (**CTRL B**):



In the dialog box choose **Add to New Bucket** (**CTRL N**):



9.1.2.2 Deleting copy buckets

You can also delete buckets from **Bucket View**. Choose the bucket you wish to delete in the drop-down menu and click on the **Delete Bucket** button:

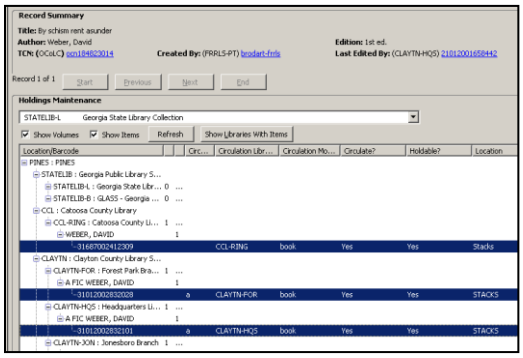
You will get a confirmation question; click on **OK** to delete the bucket.

9.1.2.3 Adding items to copy buckets

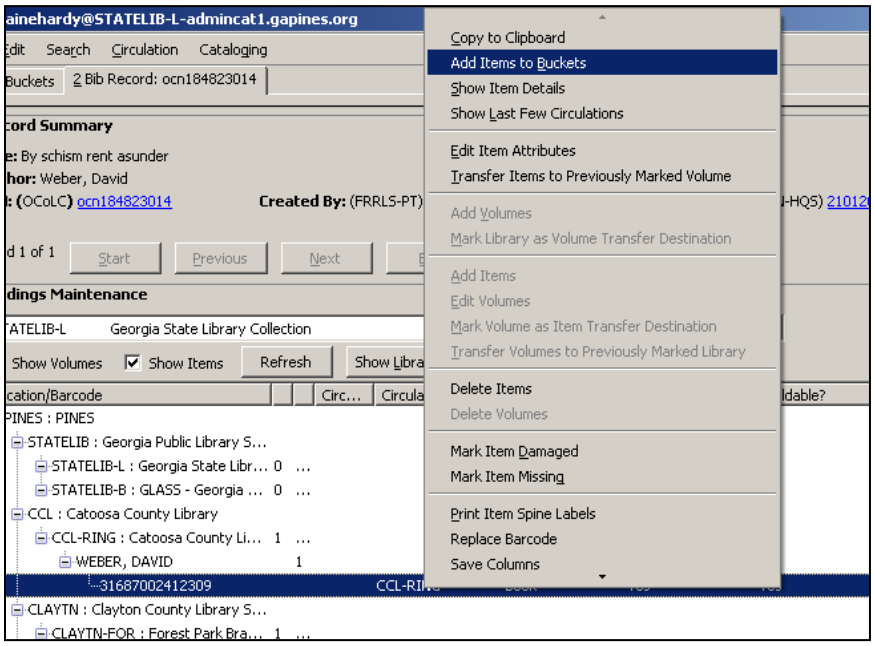
There are two ways you can add items to copy buckets, from **Holdings Maintenance** and from display item (**F5**, also called **Show Item Status by Barcode**).

9.1.2.3.1 Adding items to copy buckets from Holdings Maintenance

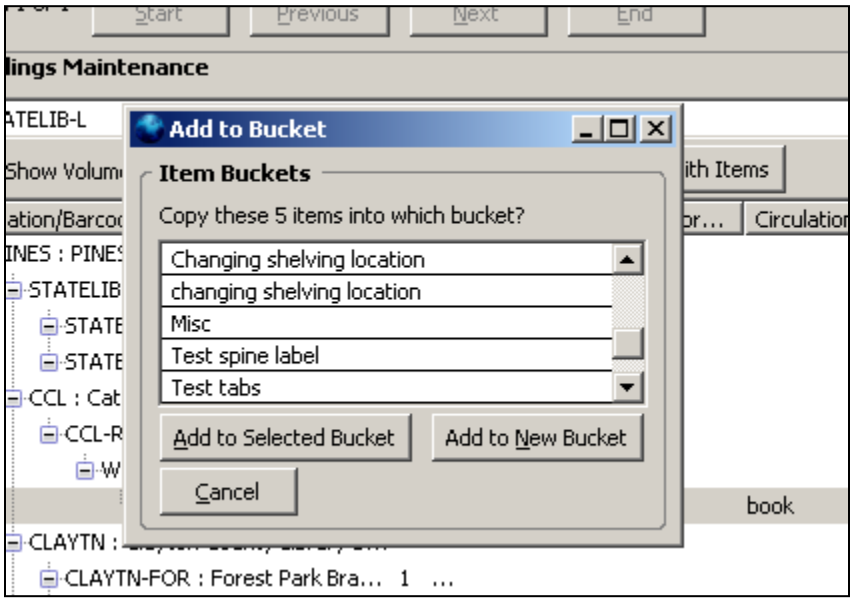
From the **Holdings Maintenance** view of a bibliographic record, click to highlight the copy or copies you wish to add to a bucket.



Then click on **Actions for this Record** or right click your mouse for the same menu and choose **Add Items to Buckets**:



Choose the appropriate bucket or create a new one.



9.1.2.3.2 Adding items to copy buckets from item status

The **Item Status** interface allows you to add barcodes across bibliographic records to copy buckets at one time. You can enter, scan or upload a file of barcodes into **Item Status**. This is particularly useful when you have a large number of copies to manipulate. For general functionality of the **Item Status** interface, see the chapter on using the **Item Status** interface.

You can type or scan barcodes into the data well in the **Item Status** screen. In release 1.4.0.7, fewer than 200 items should be entered. More than that may halt the program. Add only as many items you can easily manage.

For more than twenty items, make sure the **Trim List** option at the bottom of the screen is not checked. If it is, your returns will cap at 20 regardless of the number you are trying to add.

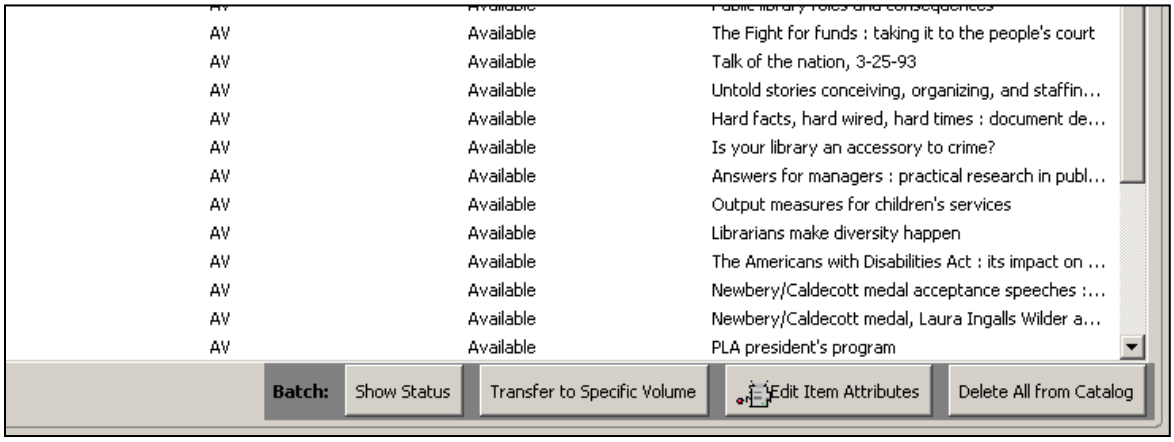
You can also upload a text file of barcodes (see the chapter on using the **Item Status** interface for more information).

Once you have the **Item Status** interface populated with the desired number of barcodes, transfer them to a copy bucket by highlighting them all and right clicking, using, **Add to Item Bucket** in the **Action for Catalogers** or **Actions for Selected Items** menus.

9.1.2.4 Processing items in copy buckets

Using copy buckets, you can make global or batch changes to items or delete a large number of items. You can make any changes to item attributes except adding or editing copy notes and changing item **Status**.

Buttons for the batch functions are in the lower right corner of the screen:



9.1.2.4.1 Show status

You can transfer the contents of a copy bucket into the **Show Status** interface. In addition to showing the circulation status of the items, there are batch cataloging functions available in the interface. For more information see the chapter on using the **Item Status** interface.

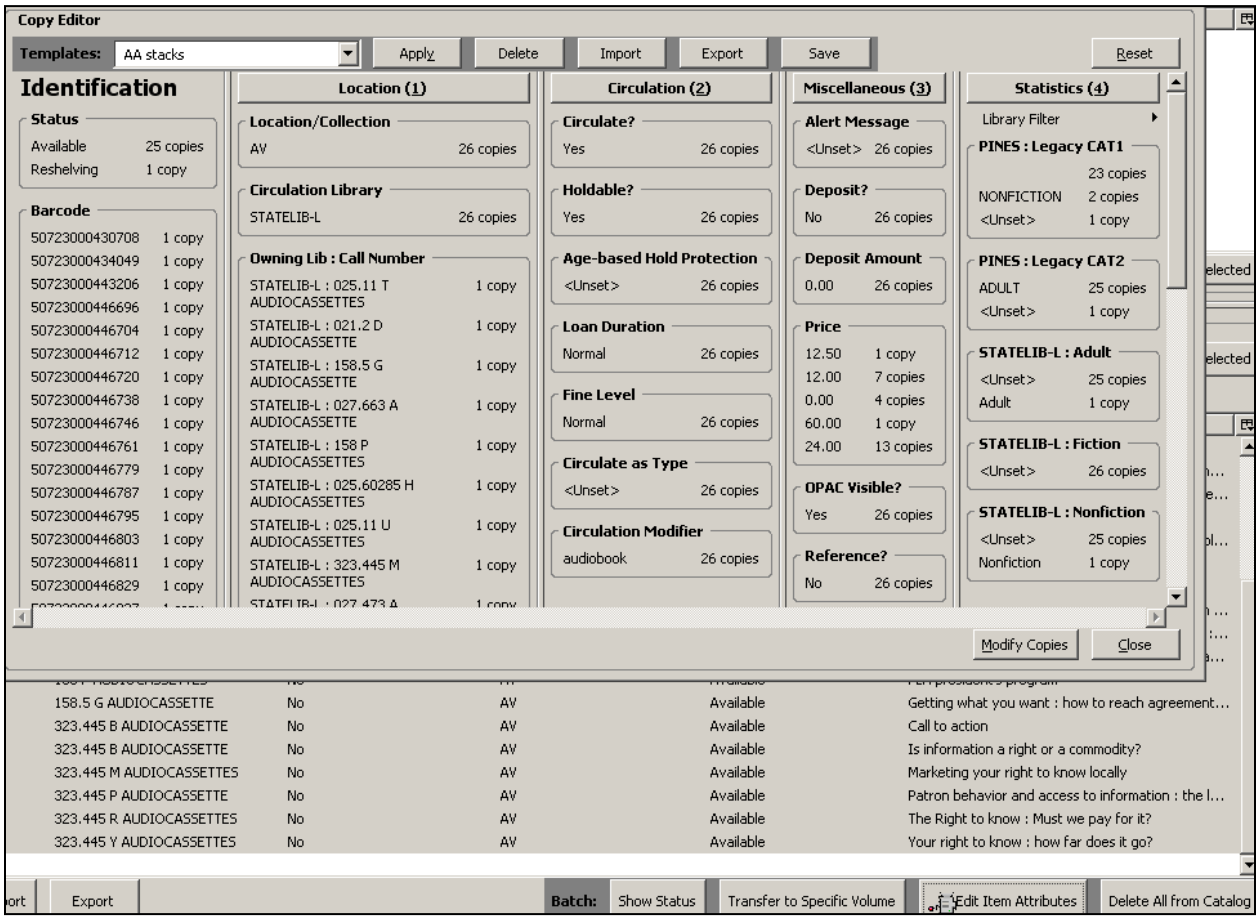
9.1.2.4.2 Transfer to specific volume

If you need to transfer several items from disparate records to one specific, volume, you can use the copy bucket rather than going to each bibliographic record to transfer the items.

9.1.2.4.3 Edit item attributes

You can globally edit **Item Attributes** from the copy bucket interface. At present, the only thing you cannot edit in this interface is copy notes. Once you have populated a bucket with items to

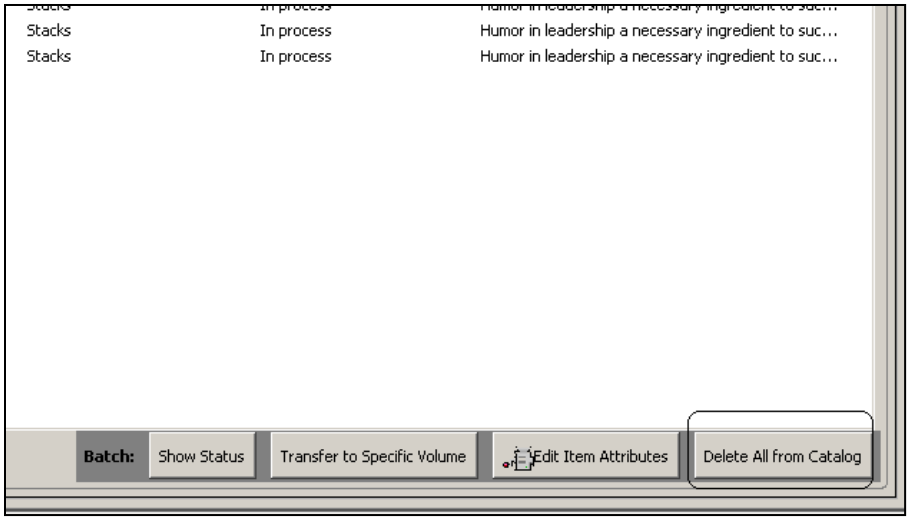
be edited, click on the **Edit Item Attributes** button. The **Copy Editor** will open. Note that all the **Item Attributes** are designated for each item.



Make the needed changes and click on **Modify Copies** to save them.

9.1.2.4.4 Delete all from catalog

You can also use copy buckets to delete groups of items from the database. Populate the bucket with the items to be deleted, and click on the **Delete All from Catalog** button at the bottom of the display:

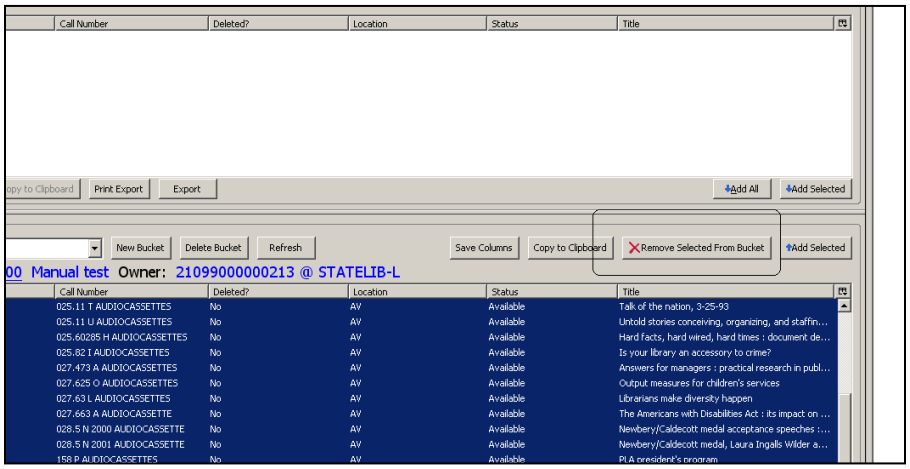


NOTE: Use caution with this feature, as you will not get a verification box for the deletions. The action is immediate and irreversible.

You will get a dialog box announcing the action is completed. All items in the bucket are now deleted from the database and the bucket will redisplay with **Deleted** set to yes.

9.1.2.5 Removing items from buckets

When you have completed the tasks for those items in the bucket, clear out the contents by selecting them all and then clicking on the **Remove Selected from Bucket** button:

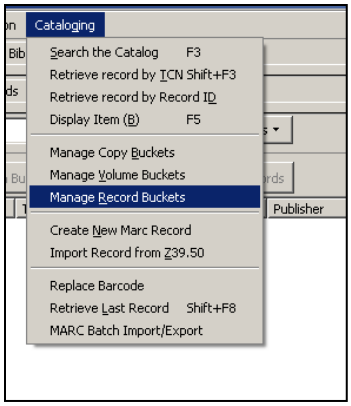


Your bucket is ready to repopulate and use again.

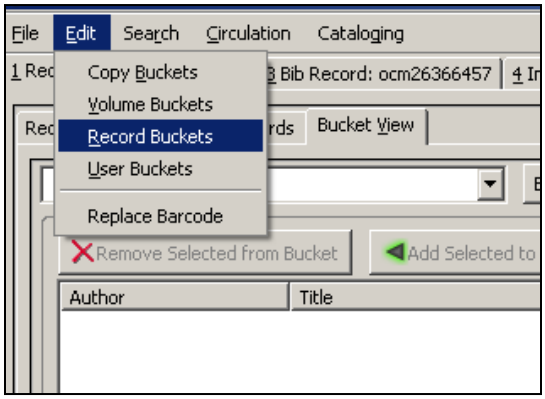
NOTE: In order to have the empty bucket display properly, you may need to refresh the bucket several times due to syncing issues with the main server.

9.2 Record bucket basics

Record buckets are used to merge or delete bibliographic records. The record bucket interface is accessed from the **Cataloging** menu- **Manage Record Buckets** (**CTRL R**):

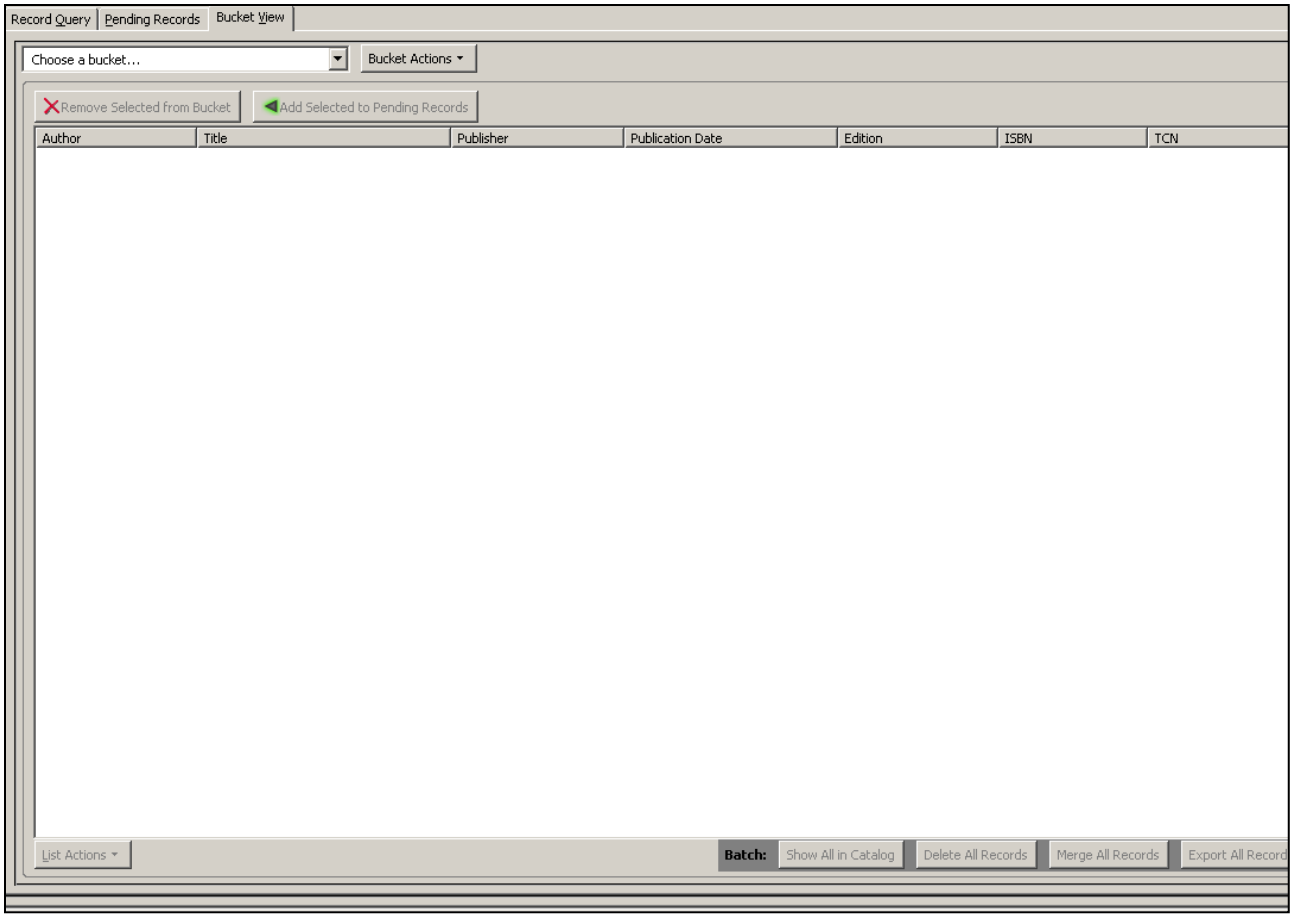


Or from the **Edit** menu:



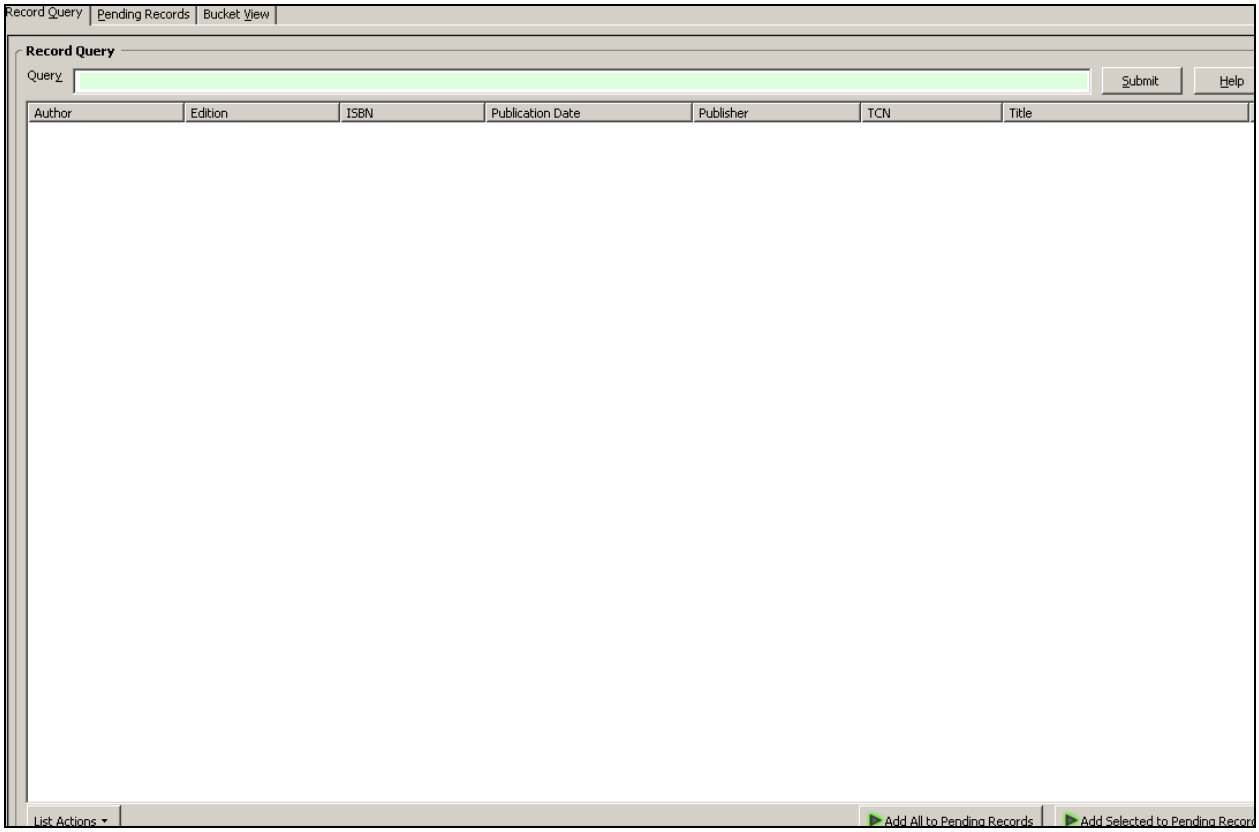
From here, you can create new buckets, delete buckets, and process titles in buckets.

Some of the basic functionality for record buckets is similar to that of copy buckets. Currently, the record bucket interface appearance does differ from the copy bucket interface. Pending records have been moved to a separate tab and you can query the database directly to find titles to add to a bucket. As with all other list interfaces in Evergreen, you can configure the arrangement and composition of the list for your needs using the column picker:

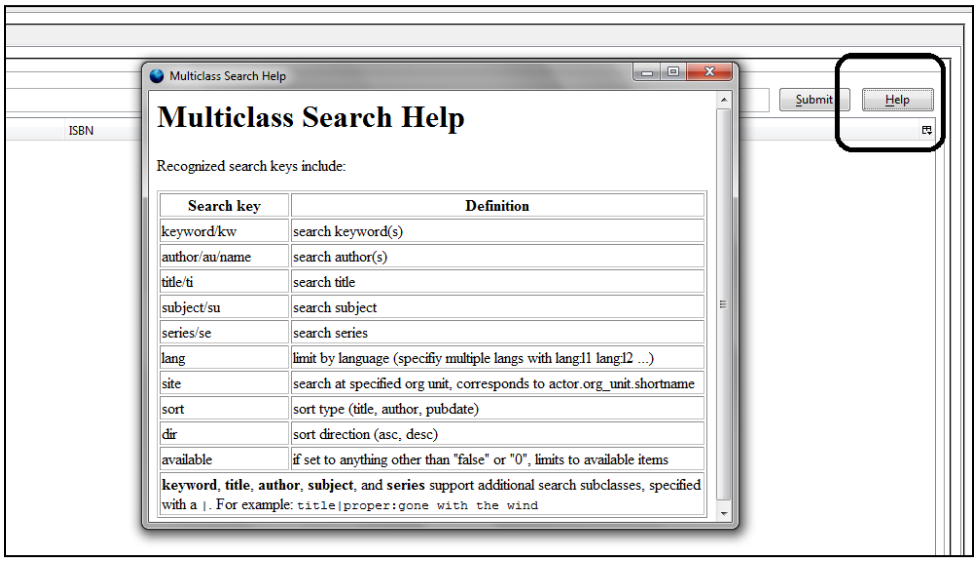


9.2.1 Record Query

The **Record Query** tab opens an interface that allows you to search the PINES database and add records to buckets. There is limited search capability of the PINES database in this interface. In release 1.4.0.7, returned titles are capped at ten and there is no way to page to the next set of ten.

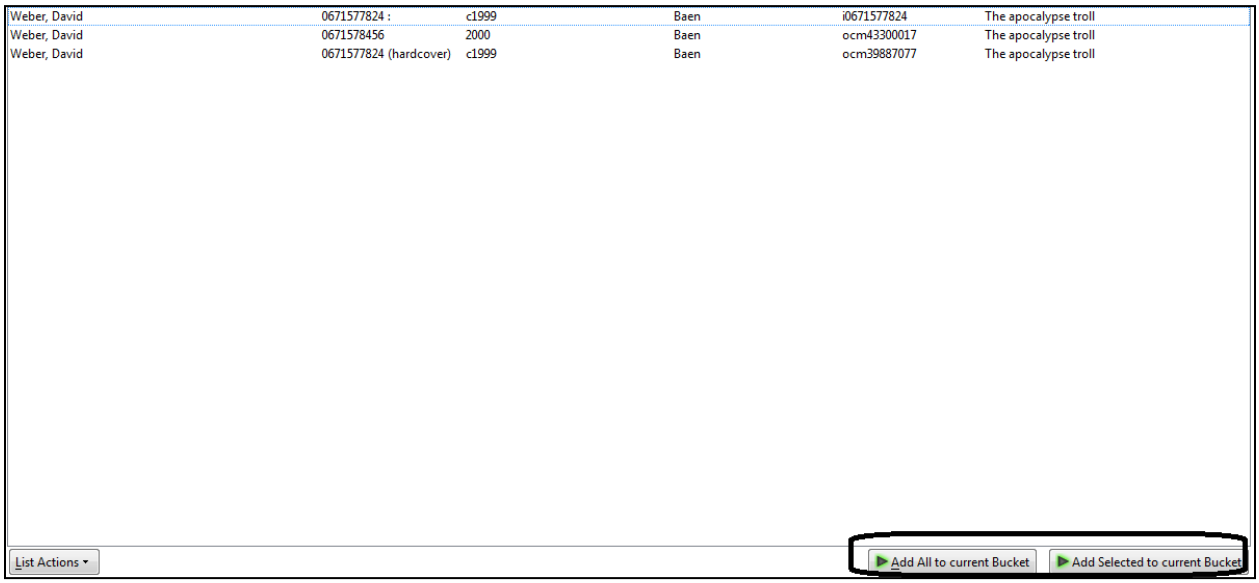


Searching does differ in the **Record Query** interface so search directions and terminology can be found under the **Help** button:



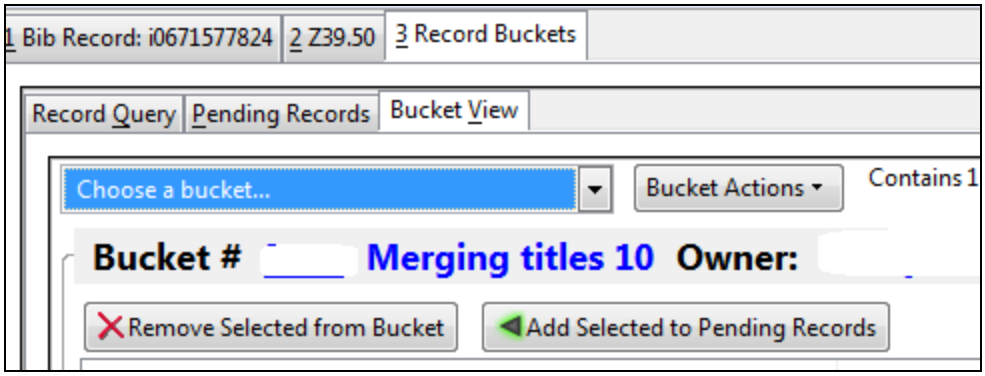
Once you have a set of titles searched, you can add all or selected ones to pending records:

From pending records, you then add the titles to the bucket or buckets you are using to merge, delete, etc.:

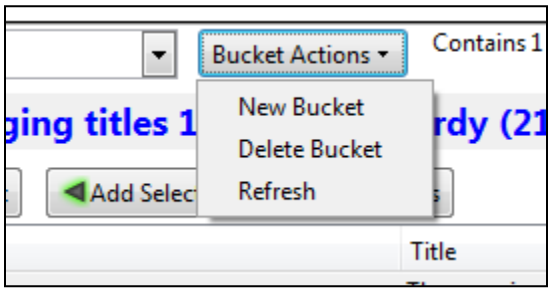


9.2.2 Bucket view

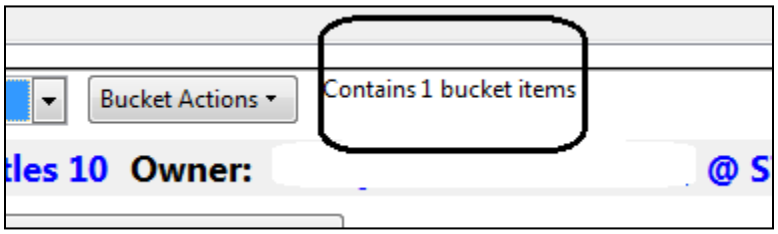
Choose an existing bucket under the drop-down menu **Choose a Bucket**:



The **Bucket Actions** button houses the **New Bucket**, **Delete Bucket,** and **refresh** options (currently, refreshing the bucket is necessary for a current view of the contents of the bucket. Occasionally, you will need to refresh multiple times to make sure all titles removed and added to the bucket are visible):



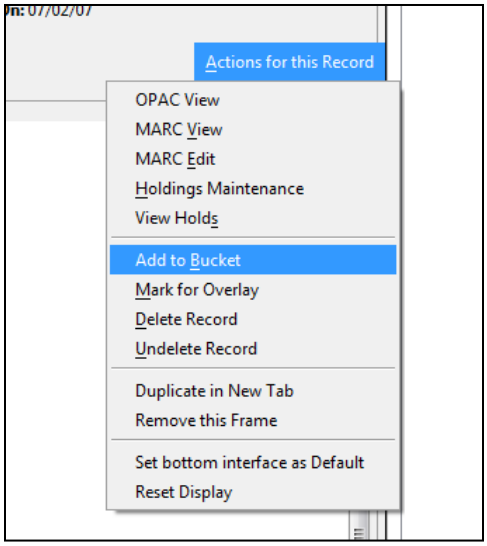
A counter to the right of the bucket action buckets keeps track of the number of titles in the current bucket. Make sure you refresh the bucket to get an accurate count after you have added or removed a title:



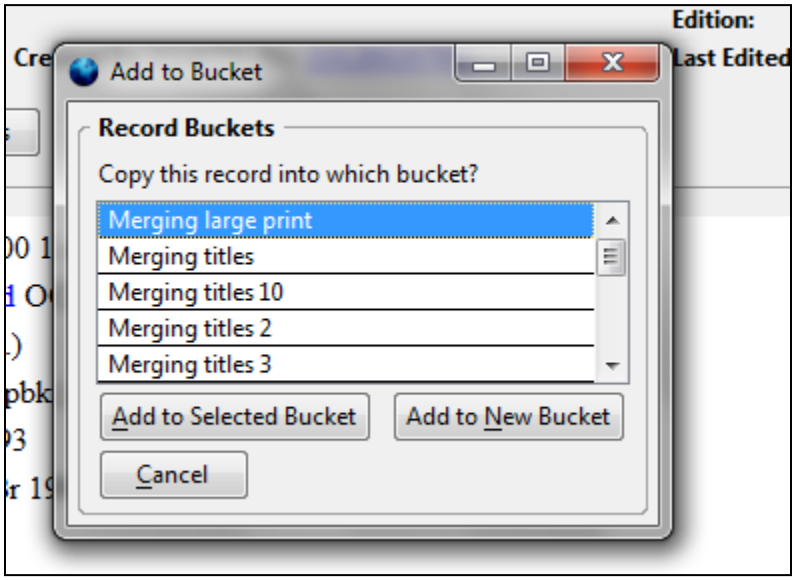
The bucket number, title, and owner are immediately below “choose a bucket”:

9.2.3 Adding titles to record buckets

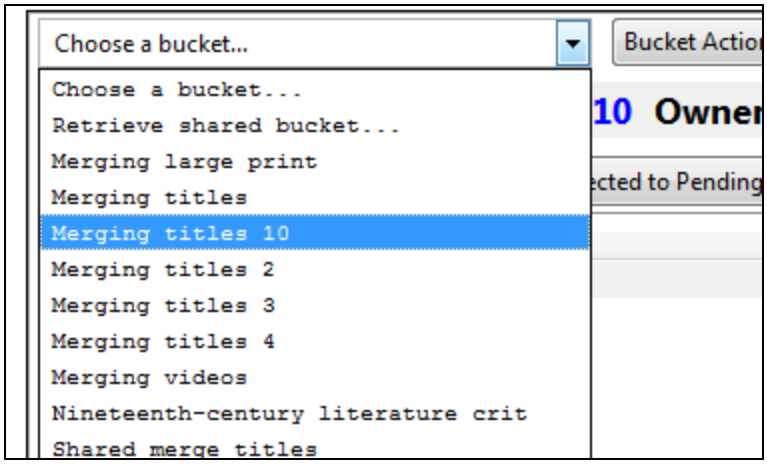
Currently, records are added to record buckets from any one of the record display screens. With the record displayed, choose **Add to Bucket** from the **Actions for this Record** menu:



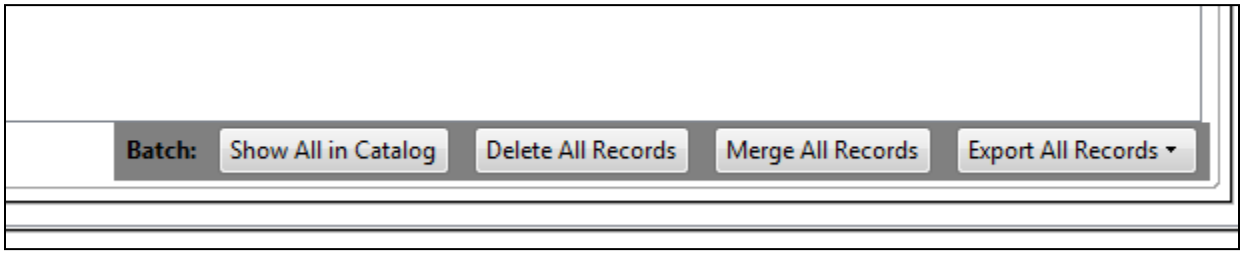
A dialog box will appear with your current buckets. You can choose one of those or create a new bucket:



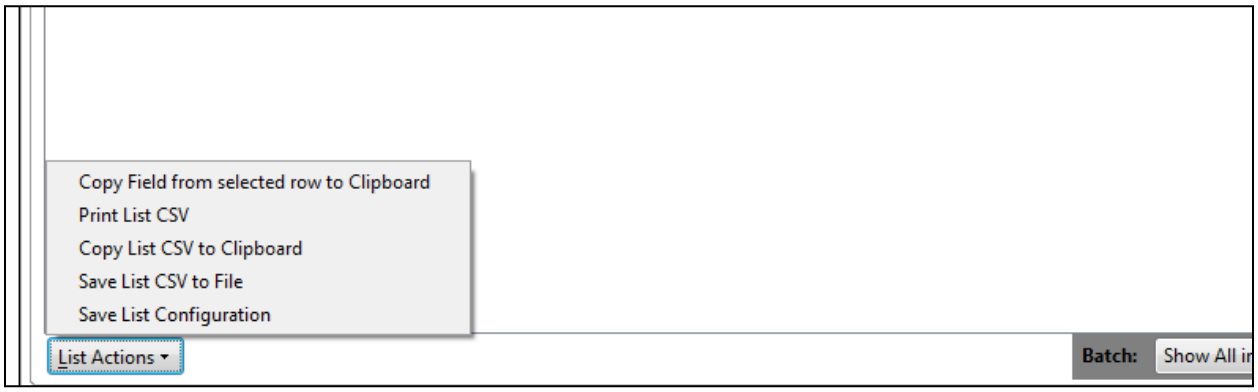
Once you have loaded the desired bucket with the necessary titles, return to the **Record Bucket** interface and choose that bucket:



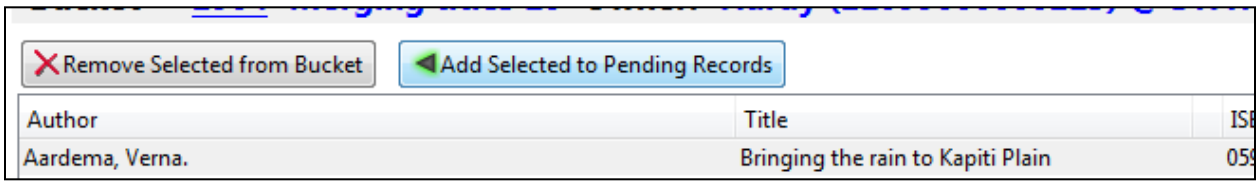
From here, you can show all the records in the catalog, delete all records from the database, merge all the records in the bucket, and export all the records:



Under **List Actions** in the bottom left hand corner of the screen, you can copy specific fields, print, copy or save the list. This is also where you save a customized list configuration:



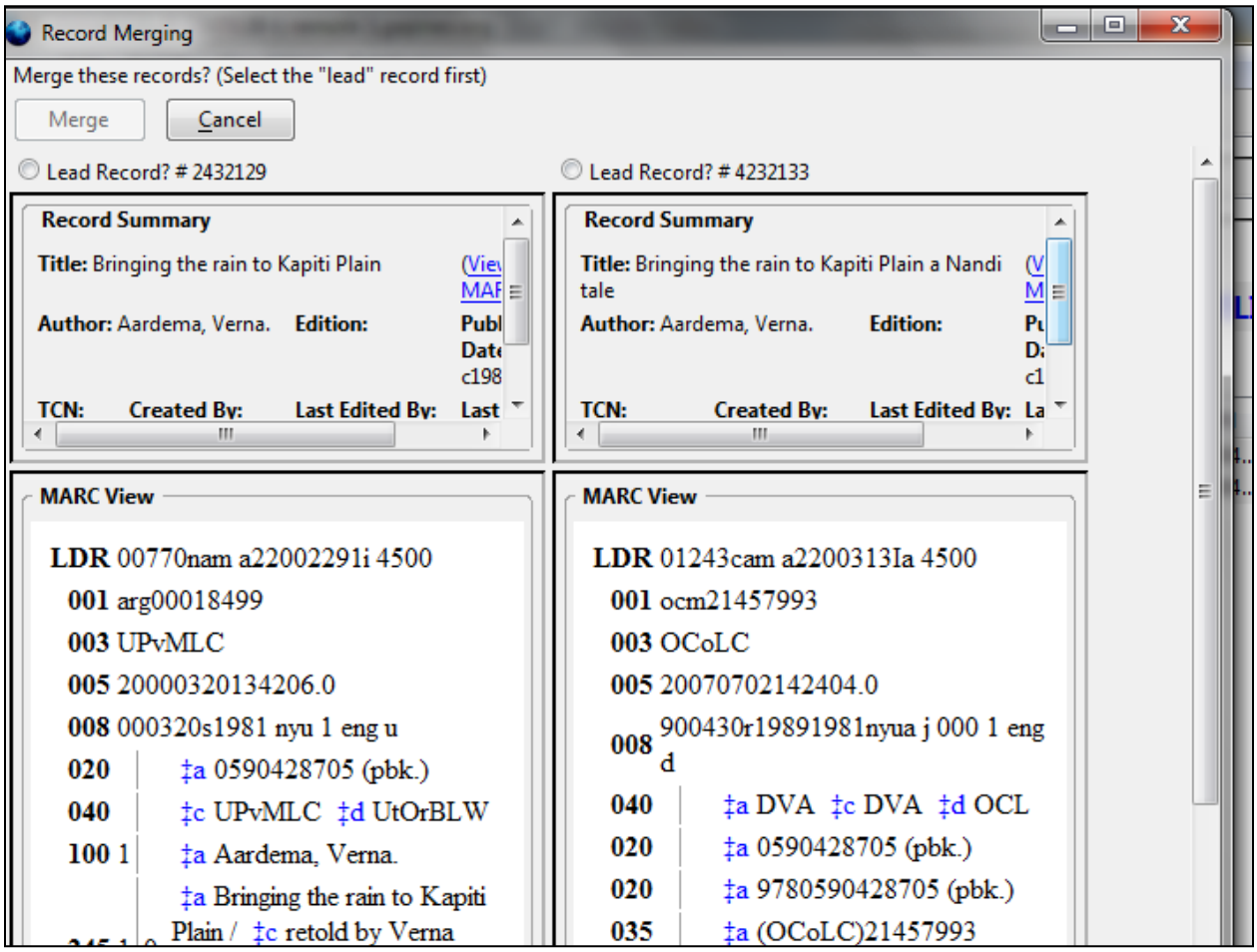
You move titles between buckets by first placing them in the **Pending Records** section:



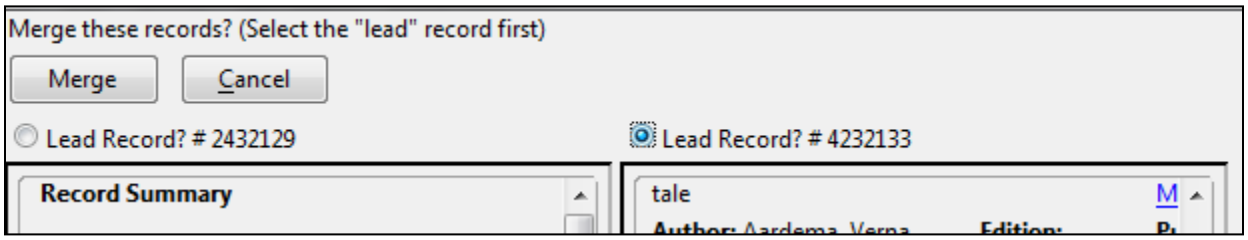
Then choose the bucket you need to move them to, go to **Pending Records,** and add all select titles to the bucket. In order to clear the pending records list, you must close and reopen the **Record Bucket** interface:

9.2.4 Merging records

Once you have all the records loaded into the bucket that you need to merge, click on the **Merge All Records** button. Each record in the bucket will be displayed side by side. If you wish to remove a record from the list, cancel the merge and return to the list to do so:

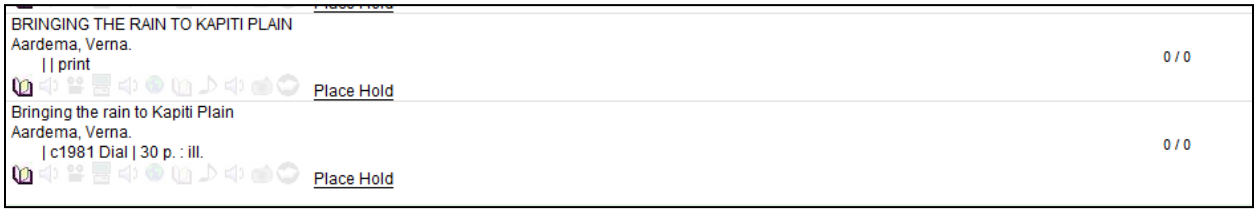


Choose the best record as the **Lead Record** and click on the radio button beside **Lead Record?** immediately above that record. Click on the newly highlighted **Merge** button:



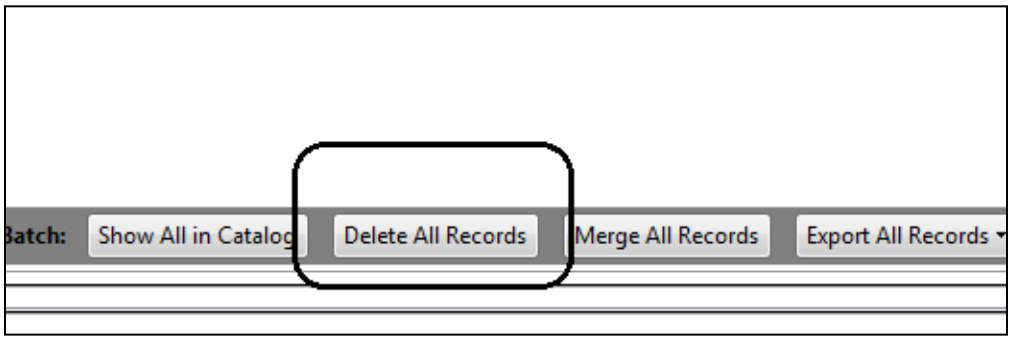
A click through dialog button letting you know the records were merged will appear. Click on **OK**; another click through dialog box confirming the action will appear (this box allows for system lag time to catch up to the display). Records that were merged onto the lead record will display as deleted in their record summaries until the system re-indexes and they no longer display:

The display of records in the title list may lag behind you as you merge. Merged or otherwise deleted records will have **0/0** holdings:

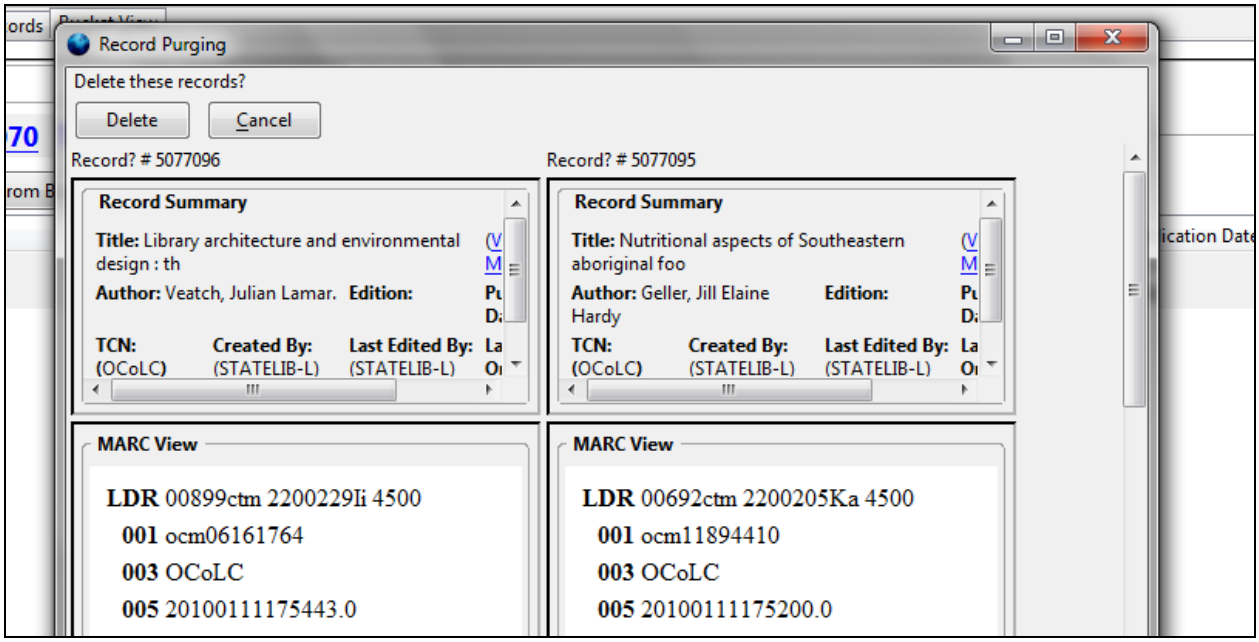


9.2.5 Deleting titles

You can batch delete bibliographic records from the record bucket interface. After you have entered the records to be deleted, Click on the **Delete All Records** button:



The records will be displayed side-by-side so that you can verify that they need to be deleted. If you discover any that should not be deleted, **Cancel** and then remove them from the bucket. Redisplay until the title no longer appears in the list before you attempt to delete the records again. When ready to delete, click on the **Delete** button. **NOTE: You will get no chance to cancel this action once you click on the Delete button** :



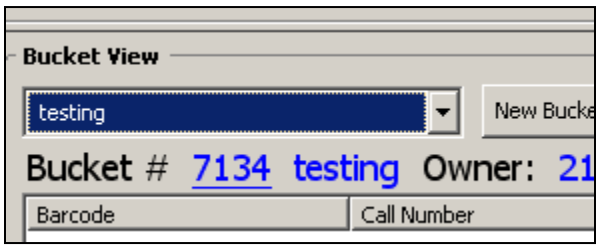
A click through dialog box appears indicating that the records have been deleted. Click **OK** to continue. The **Action Completed** dialog box will then display. Click on **OK** to clear it.

9.2.6 Exporting records

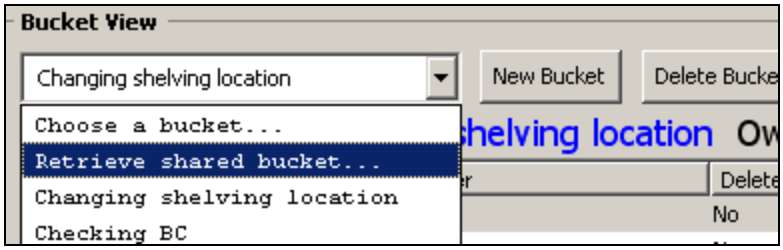
Exporting records in the record bucket interface is not something you will likely do. It is a bit cumbersome and is more easily done in from the export/import interface. Please see that section of the manual for instructions.

9.3 Sharing buckets

You can share any bucket with another user by communicating the bucket number to them.



Shared buckets are retrieved using this number. Click on the drop-down menu and choose **Retrieve Shared Bucket**:

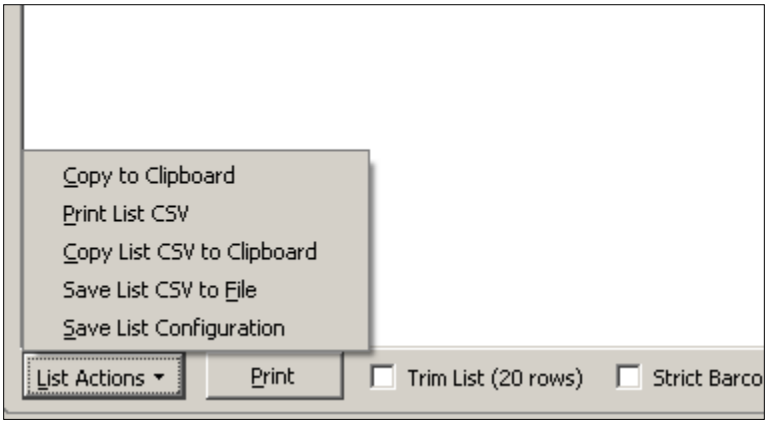


Enter the bucket number in the dialog box to access the bucket. Items or records can only be removed from the bucket using the login that created it.

Chapter 10 Using the Item status interface

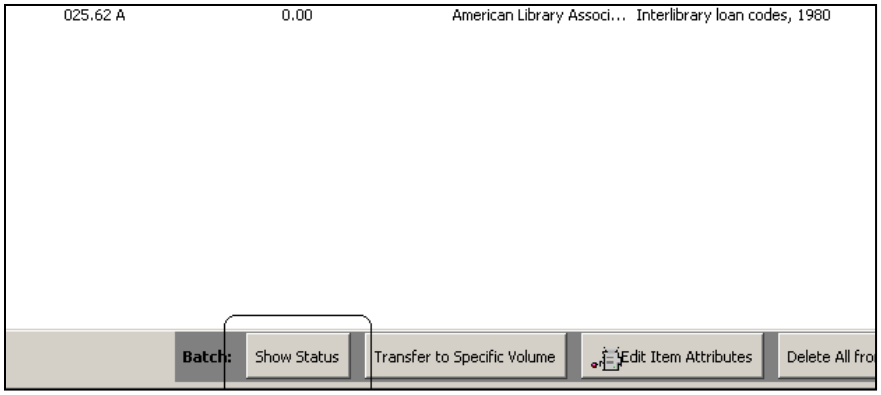
You can use the **Item Status** interface (**F5**, also called **Display Item**) for global changes to multiple items across multiple bibliographic records. Most cataloging functionality available in **Holdings Maintenance** is available through item status. Unlike in **Holdings Maintenance**, the functionality is not limited to one bibliographic record. You load item records into the interface by barcodes three different ways: scan or typing the barcode(s) directly into the search box, transferring items from an item bucket, or uploading a text file of barcodes. The limit of barcodes to transfer from a bucket or upload from a file is around 200. Make sure that the option to trim the list to 20 rows, located on the bottom left of your screen, is unchecked or you will be unable to display more than 20 items. If your barcodes are not standard, make sure that option is unchecked as well.

You can use the column picker to choose the elements you want to have displayed. You can also drag the column headings to re-order them into a desired configuration. To save the list configuration, click on **List Actions** in the lower left of your screen and then **Save List Configuration:**



10.1 Transferring items from a copy bucket

To transfer items from a copy bucket to the item status interface, in the copy bucket, click on the **Show Status** button in the lower right of your screen:



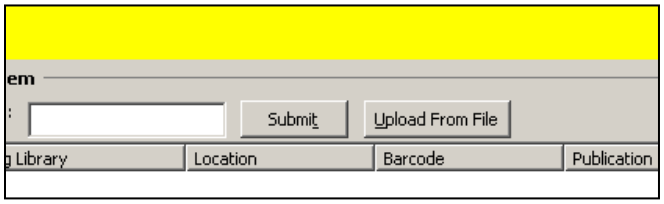
A new tab will open for the **Item Status** interface and will automatically load with you bucket items.

10.2 Uploading a text file into item status

To upload a file, first create a text file (.txt extension) of barcodes, with one barcode per line. For example:

50723010131671¶
50723010131672¶
50723010131673¶
50723010131674¶
50723010131675¶
50723010131677¶
50723010131678¶
50723010131679¶

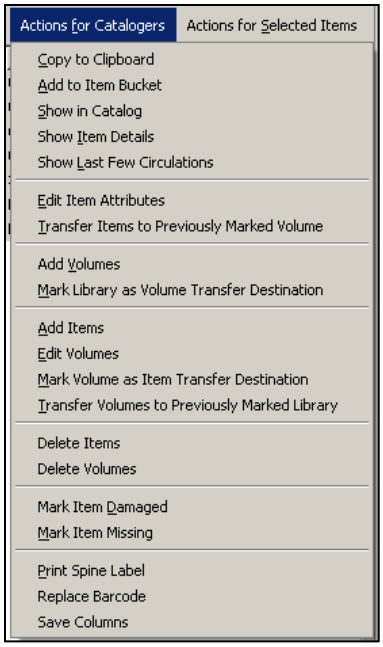
Click on the **Upload From File** button (**CTRL U**) to the right of the barcode input well on the upper left corner of your screen:



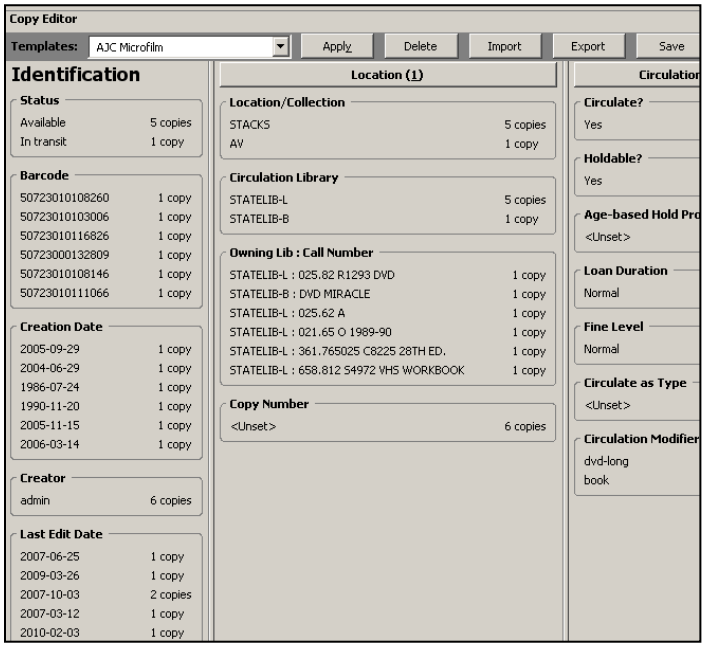
NOTE: There is no way to stop the file once it begins. Invalid entries will result in a click through warning box that the barcode is either mis-scanned or not cataloged. If you have a file with many incorrect barcodes, you will need to respond to the warning box each time.

10.3 Actions for catalogers: making global changes

You can also use the **Actions for Catalogers** menu to make global changes to multiple items across multiple records, including batch label printing. Please see the chapter on printing spine and pocket labels for this functionality.



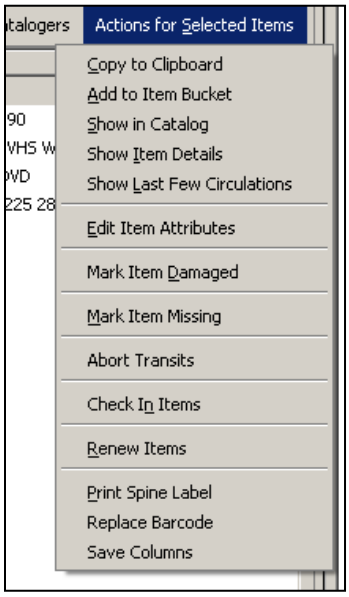
Some of the functions, such as **Add Volumes** will open in individual dialog boxes. As you complete or close one box, the next will be displayed. Other functions, such as **Edit Item Attributes** will open one dialog box that allows you to make changes to all items simultaneously.



Others, such as **Mark Library as Volume Transfer Destination** and **Edit Volumes** are not possible for more than one volume or item simultaneously and will generate an error message or bring up only one item. Attempting to replace barcodes in batch is not recommended since the old barcode does not display in the dialog box, increasing the possibility of errors.

10.4 Actions for selected items

In addition to other functionality, you can also make limited global changes using the **Actions for Selected Items** menu:



While **Copy to Clipboard** will display more than one item's information, clicking on the desired element to copy closes the window.

Add to Item Bucket will put items from the item status interface into an item bucket. This is useful since the populated item status screen cannot be saved and is cleared on closing. If you wish to retain a list of items entered into item status, transferring to an item bucket will do so.

Show Item Details, **Show Last Circulations**, and **Replace Barcode** will display one record at a time. Since the **Replace Barcode** dialog box does not indicate which copy you are changing, attempting to do this for more than one record at a time is not recommended.

Edit Item Details functions as it does in the **Actions for Catalogers** menu.

Mark Item Damaged and **Mark Item Missing** will open dialog boxes affirming the action for each barcode and, in the case of **Mark Item Damaged**, warning that you may have to bill patron separately. Any items with the status **In Transit** or **Checked Out** must be checked in before changing their status to **Damaged** or **Missing**.

10.5 CSV files

You can create CSV files populated by the columns displayed in **Item Status**. With these files you can create documents and spreadsheets for other uses. You can print the CSV output, copy it to the clipboard or save to a file. Copying and saving to a file allows you to transfer the information into a document or spreadsheet application such as Microsoft Word or Excel. CSV functionality is found under **List Actions** in the lower left-hand portion of the screen.

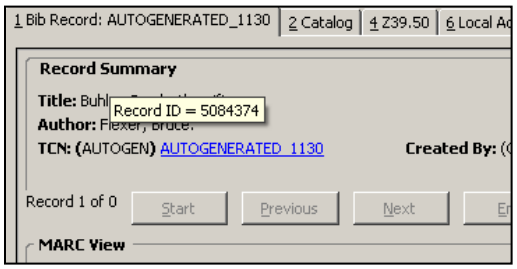
Chapter 11 Other Cataloging Functions

11.1 Exporting records

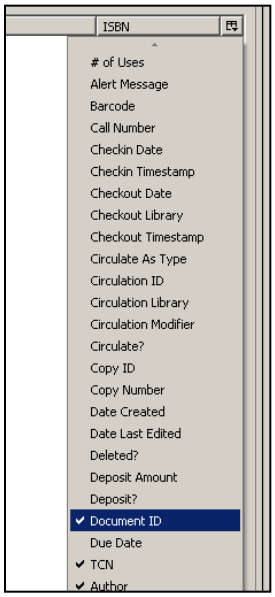
You can export MARC records created in the PINES database either singly or in batch to later import into OCLC. These records must be compliant with national cataloging standards and OCLC input standards. Also double check OCLC to confirm there is no matching record available.

11.1.1 Single record exporting

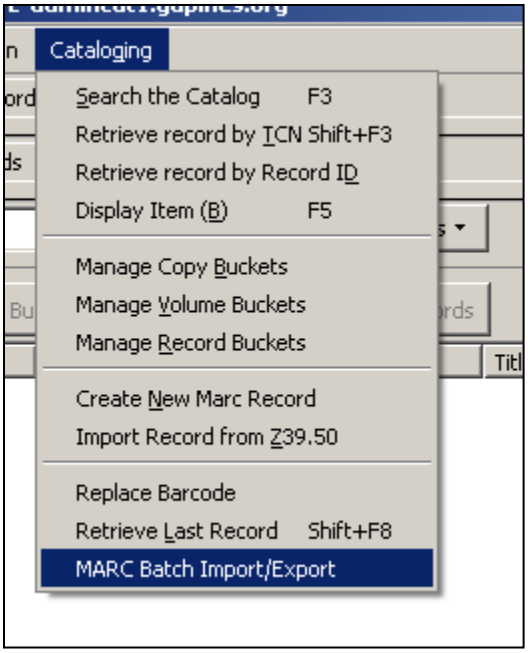
You will need the **Record** or **Document ID** for the records. They can be located by either holding your cursor over **Record Summary** to display the **ID:**



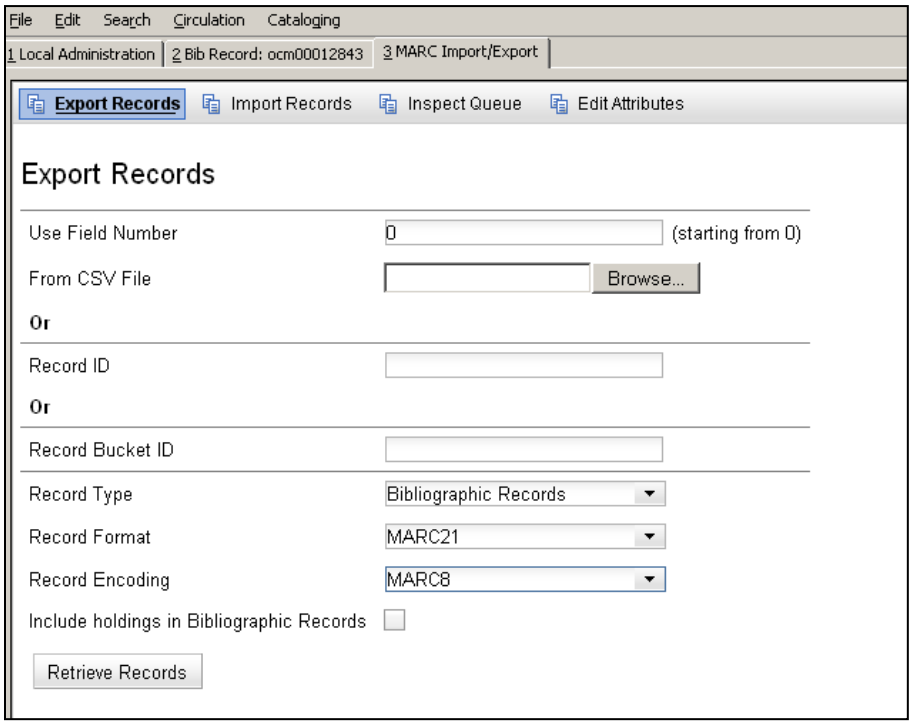
Or by putting the record in a **Record Bucket** and picking the **Document ID** column for display:



Next, from the **Cataloging** menu, open the **MARC Batch Import/Export** screen in a new tab:



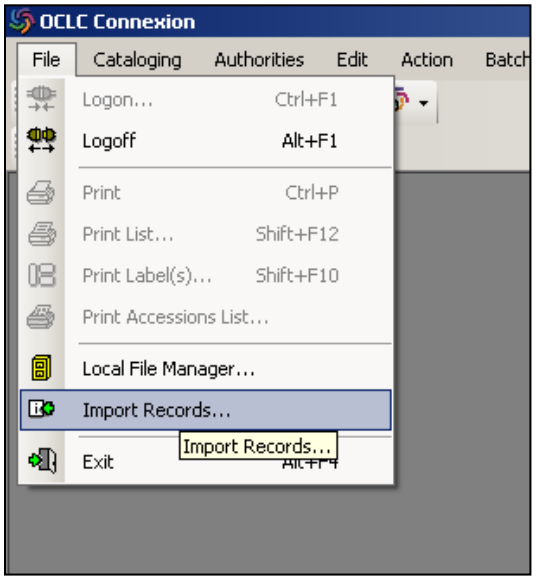
And choose the **Export Record** tab:



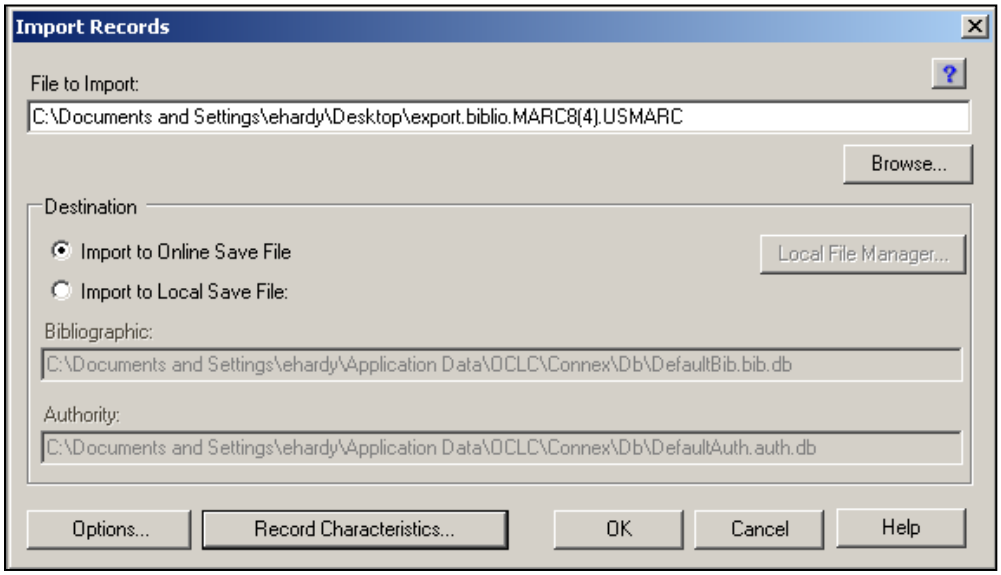
Make sure **Record Type** is **Bibliographic Records**; **Record Format** is **MARC21** and **Record Encoding** is **MARC8**. Do not include holdings. Enter your **Record ID** number in the appropriate input well and click on the **Retrieve Records** button. From there you will be prompted to save or open the file. You can open the file to view if you wish. The default location to save the file is to your desktop. As of release 1.4.0.7, this is not configurable.

NOTE: There are currently no warnings if the export fails. Reasons for the export failing can include overly long fields (505 particularly), invalid characters in the record, or incorrectly transcribing the **Record ID**.

Once the file is saved, open the OCLC Connexion Client and log in using your library's authorization and password. Then, under **File**, chose **Import Records:**



A dialog box opens that allows you to browse for the file to be imported and to choose the destination of the import. Choosing to import to the online save file gives you more options in controlling headings and other editing:



Click on **OK** to import the file. The Connexion client can be configured to automatically display an import report. If the export and import are successful, the report will indicate one record was imported.

Once the record is imported, go into either your local or online save file and make any necessary editing changes. For example, you should change ELvl to I from K and delete the 901 field added on import. Also make sure that all formatting is correct, standards are followed and control your headings. More information on doing this is provided in Connexion client training and in OCLC documentation:

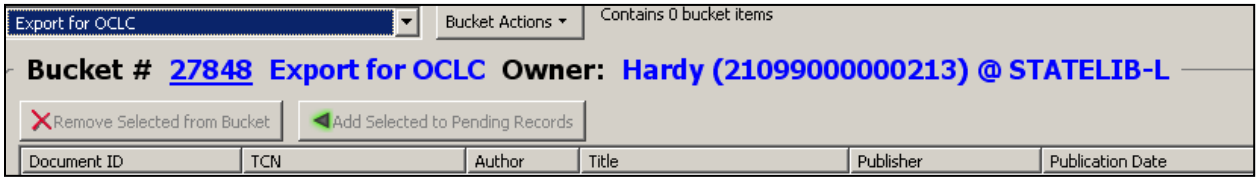
> OCLC. 2010. Connexion client documentation. Retrieved June 10, 2010 from http://www.oclc.org/us/en/support/documentation/connexion/client/default.htm
>
> OCLC 2010 OCLC Connexion Client tutorials Retrieved June 10, 2010 from http://www.oclc.org/us/en/support/training/connexion/client/tutorial/

When the record is completed, update your holdings to add the record to OCLC.

Your last step is to overlay the PINES local record with the newly created OCLC record.

11.1.2 Batch records exporting

You can also batch export records using the **Record Bucket** interface. Load records into a bucket for export. Record the **Record Bucket ID Number** located below the drop-down menu:



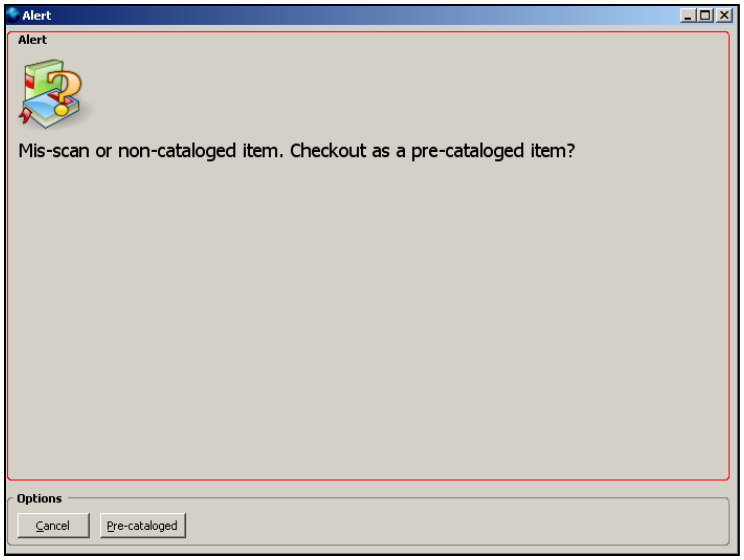
Follow the directions above to open the **Export Records** interface, making sure the **Record Format**, **Encoding,** and other information is correctly set. Enter the ID in the input well for the **Record Bucket ID**. Follow the directions above to retrieve, **Save**, and then import the records into OCLC. An import report in the OCLC Connexion client will indicate the number of successful imports. If the number differs from the **Record Bucket** count in Evergreen, then some of the records may not have exported. Make sure each PINES record is overlain with the new OCLC records you have created.

11.2 Non-cataloged items and Inter-Library loans

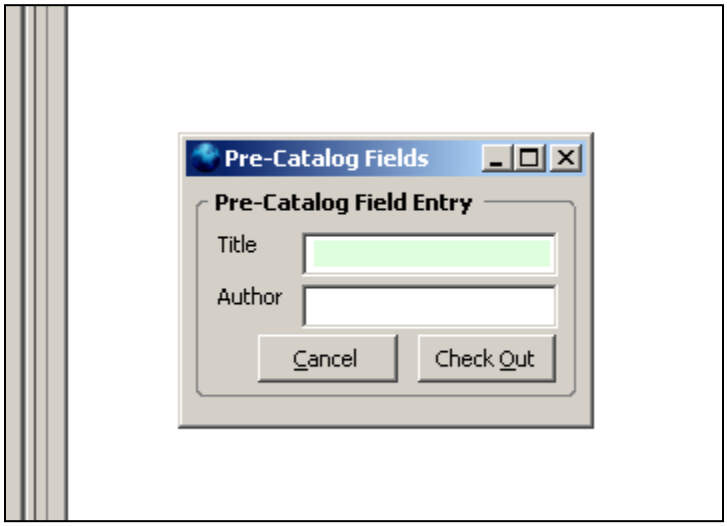
11.2.1 Circulating non cataloged items

Evergreen allows circulation staff to circulate items patrons find on the shelf that are not in the database so that the patron can leave the library with the item. The creation of non-cataloged circulation records occurs at the time of circulation. These **Precataloged** (**Pre-Cat**) records do not display in the patron OPAC and have limited display in the staff client. They should be routed to cataloging for resolution at **Check In**.

At **Check Out**, when a barcode is not recognized by the system, a warning box is displayed:

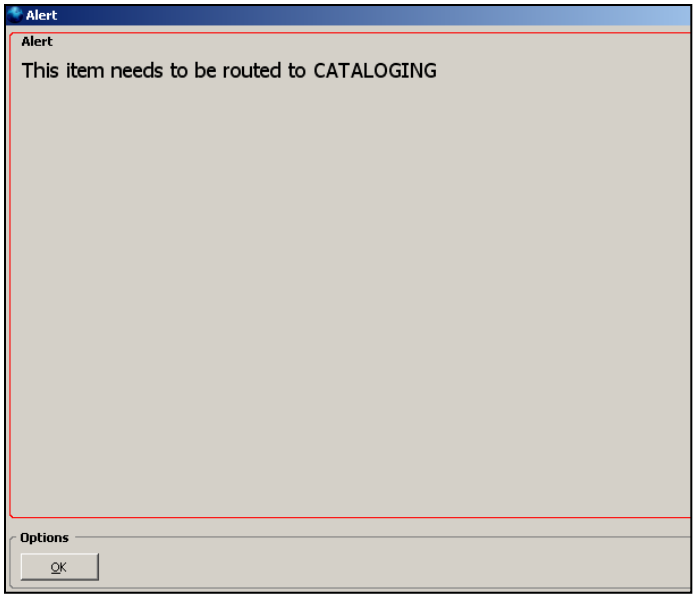


Best practice is to cancel and reenter the barcode to make sure it scanned correctly. Once you are sure it scanned correctly and is not in the database, click on the **Pre-Cataloged** button. A small dialog box will open to input title and author to allow for circulation.

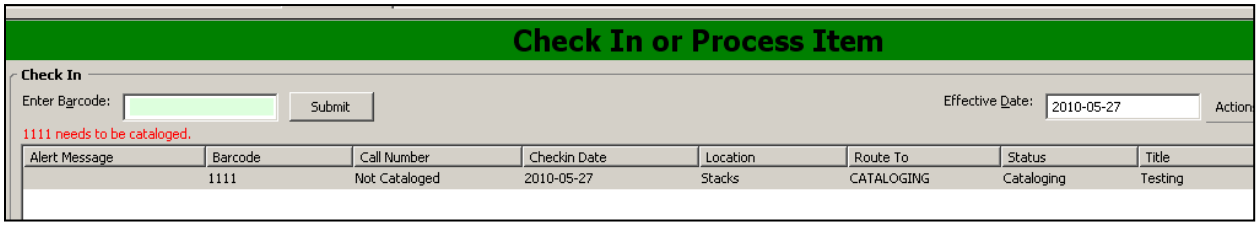


All **Pre-Cataloged** items default to book circulation policies.

Since **Pre-Cataloged** items are essentially just place holders, they only appear on the patron record and in a **Display Item** (**F5**) search. On **Check In**, a dialog box will display to route to **Cataloging**:



The item will display on the **Check In** screen with a warning message at the top:



NOTE: the **Pre-Cat** record is not automatically deleted from the database at **Check In** and must be either manually deleted or transferred to matching MARC record.

If the **Pre-Cat** item is not going to be attached to a complete MARC record, it should be deleted from the system. These records can only be retrieved in **Item Status** (**F5**). Use the **Actions for Catalogers** menu to delete the item. Remember, if you delete the **Pre-Cat** item, you will not be able to retain any circulation statistics if you re-add the barcode to a MARC record.

If you wish to retain the item and the statistics from the **Pre-Cat** circulation, it should be transferred to a matching, complete MARC record, a suggested workflow for transferring the item is to:

1. Display the **Pre-Cat** item in **Item Status** (**F5**).
2. Open a new tab and search for a matching record in the PINES database or import a matching record from OCLC.
    a. If necessary, follow directions to create a call number or volume for the item using zero copies.
    b. Select the correct volume (either the new one added or an existing one) and choose **Mark Volume as Item Transfer Destination** from the **Actions for Selected Rows** menu.

3. Go back to the **Item Status** tab; from the **Actions for Catalogers** menu select **Transfer Item to Previously Marked Volume**.
4. Return to the bibliographic record and **Refresh**.
5. Select the item you transferred and follow directions and library policy to set the appropriate attributes for the item.

11.2.2 Circulating inter-library loan items

Currently, the best way to circulate OCLC interlibrary loan (ILL) items is to use the **Pre-Cat** functionality using the existing barcode on the item. This means you will need to check out the item to the patron before they are in the library. Since the loaning library sets the due date of the item, when the patron picks up the item is not relevant to its return date. After you have added the item, renew the item twice to prevent the patron from renewing without authorization from the loaning library, and then edit the due date to the desired date. On return, delete the item from the database from the **Item Status** (**F5**) screen.

11.3 Replacing barcodes

Barcodes can be replaced through **Holdings Maintenance, Item Status (F5)** or in the **Circulation** menu.

In the **Circulation** menu, select **Replace Barcode**. A dialog box will appear in order to enter the existing item barcode. After entering the barcode, click on **OK**. A second dialog box will appear for the new barcode. Enter and click on **OK.** The barcode will be replaced on the record. Care should be taken when using this functionality since the bibliographic record does not display.

In **Item Status (F5)**, **Replace Barcode** choose under either the Actions for Catalogers or **Actions for Selected Items** menus.

Best practice is to change the barcode from **Holdings Maintenance** so that you can verify that you have the correct item to replace. In the **Actions for This Item** menu, choose **Replace Barcode.** A dialog box for the new barcode will appear. Enter or scan in the barcode and click on **OK**.

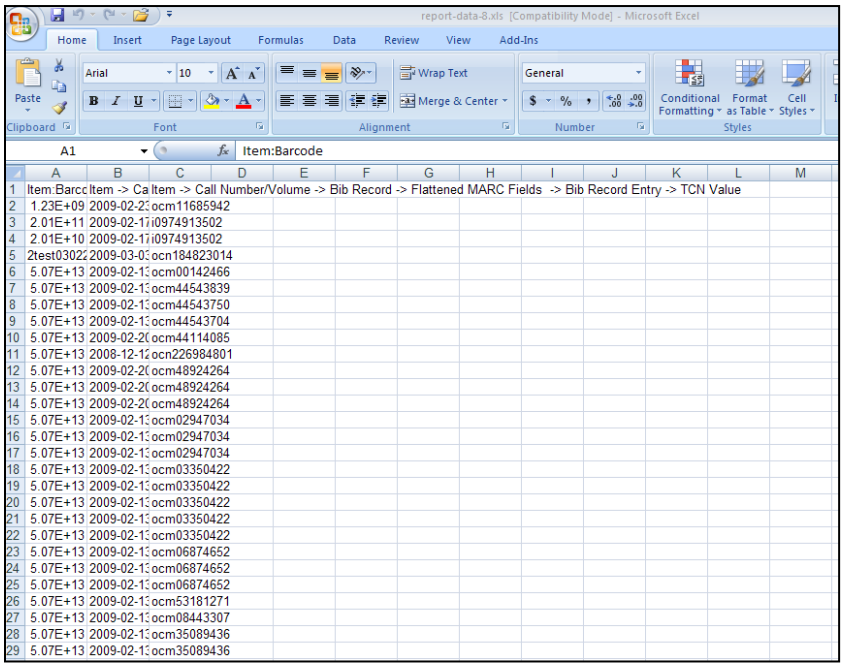
11.4 Managing holdings in OCLC

In order to remain compliant with GOLD regulations and facilitate interlibrary loan, PINES libraries should manage their own holdings in OCLC. How often you set your holdings is a matter of local procedure and policy. However, doing so weekly or monthly might lessen the impact the process has on your overall workflow.

11.4.1 Setting holdings in OCLC

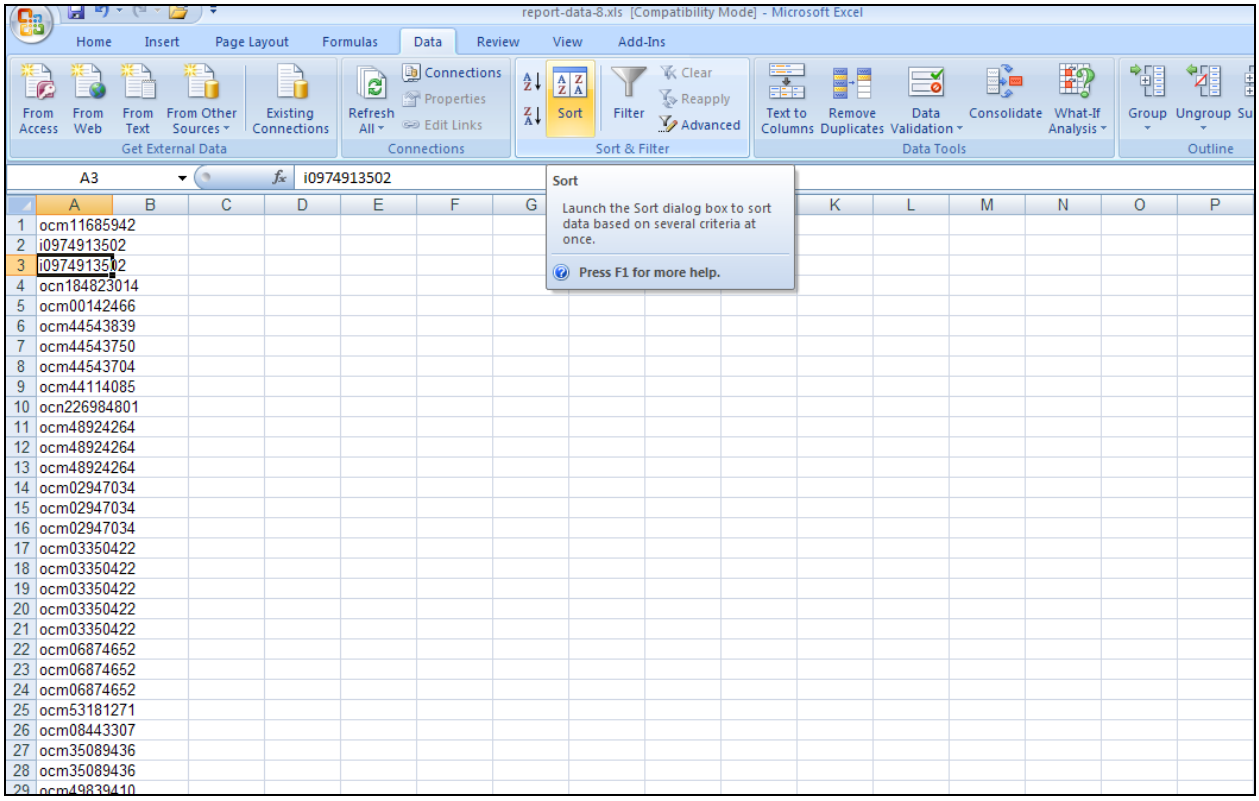
11.4.1.1 Creating a text file from an Evergreen report

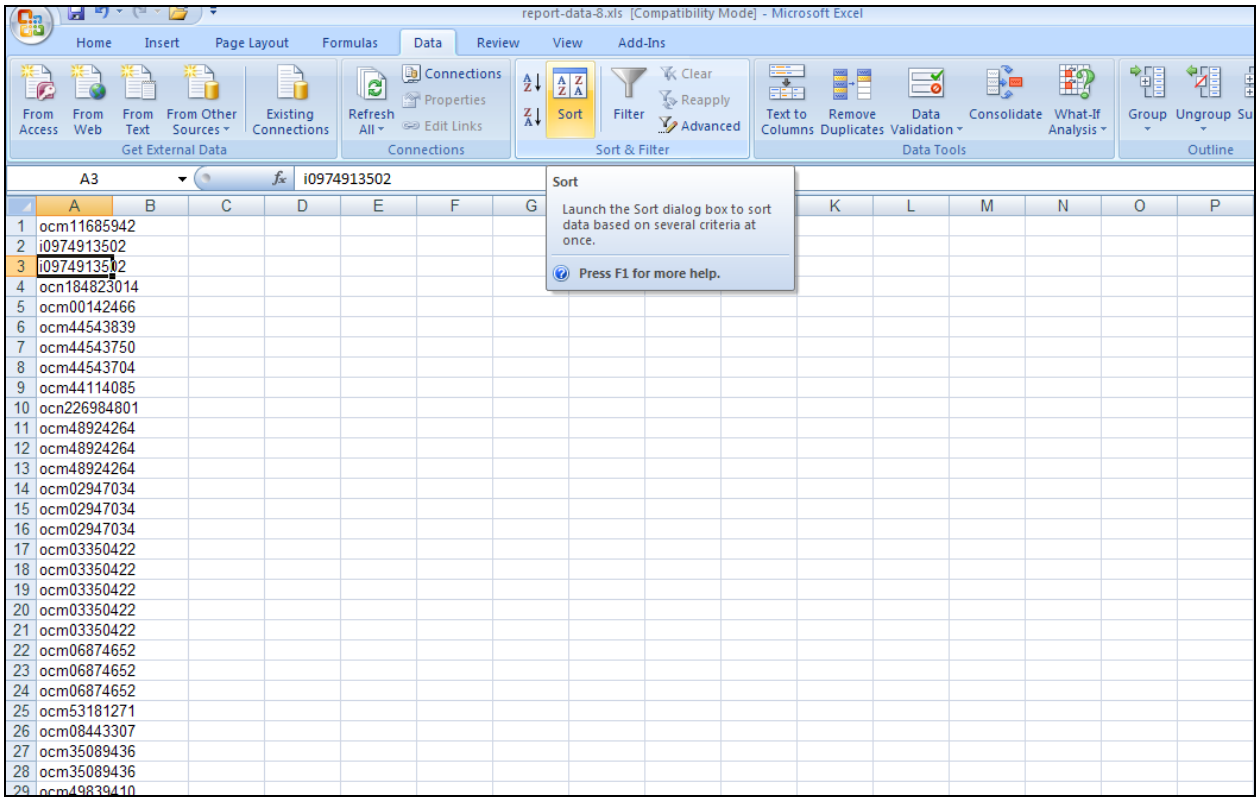
Run a report for the TCNs added by specific date range, with MSExcel output, and filter out deleted Items. Your raw report in MSExcel (all screen shots are from MSExcel 2007) may look something like this, depending on what you have asked to be displayed. It can be just TCNs, or, depending on how you wish to handle the records with non-OCLC TCNs, you may want to include enough information to match those records in OCLC. Here I have included barcodes and the date the item was added:



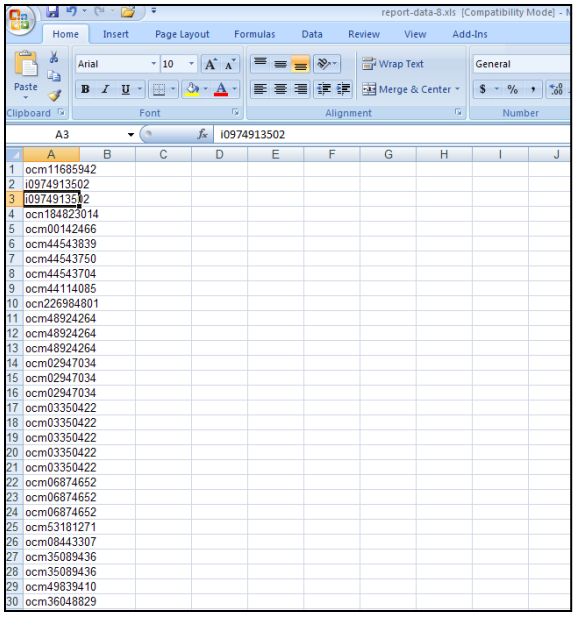
	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Item:Barcc	Item -> Ca	Item -> Call Number/Volume -> Bib Record -> Flattened MARC Fields -> Bib Record Entry -> TCN Value										
2	1.23E+09	2009-02-2	ocm11685942										
3	2.01E+11	2009-02-17	i0974913502										
4	2.01E+10	2009-02-17	i0974913502										
5	2test03022	2009-03-0	ocn184823014										
6	5.07E+13	2009-02-1	ocm00142466										
7	5.07E+13	2009-02-1	ocm44543839										
8	5.07E+13	2009-02-1	ocm44543750										
9	5.07E+13	2009-02-1	ocm44543704										
10	5.07E+13	2009-02-2	ocm44114085										
11	5.07E+13	2008-12-1	ocn226984801										
12	5.07E+13	2009-02-2	ocm48924264										
13	5.07E+13	2009-02-2	ocm48924264										
14	5.07E+13	2009-02-2	ocm48924264										
15	5.07E+13	2009-02-1	ocm02947034										
16	5.07E+13	2009-02-1	ocm02947034										
17	5.07E+13	2009-02-1	ocm02947034										
18	5.07E+13	2009-02-1	ocm03350422										
19	5.07E+13	2009-02-1	ocm03350422										
20	5.07E+13	2009-02-1	ocm03350422										
21	5.07E+13	2009-02-1	ocm03350422										
22	5.07E+13	2009-02-1	ocm03350422										
23	5.07E+13	2009-02-1	ocm06874652										
24	5.07E+13	2009-02-1	ocm06874652										
25	5.07E+13	2009-02-1	ocm06874652										
26	5.07E+13	2009-02-1	ocm53181271										
27	5.07E+13	2009-02-1	ocm08443307										
28	5.07E+13	2009-02-1	ocm35089436										
29	5.07E+13	2009-02-1	ocm35089436										

Sort the list so that non OCLC TCNs can be removed to be handled later. You can create a new worksheet for these or a different file if you want to investigate them further. Where the sort is will depend on the version of MSExcel you have:





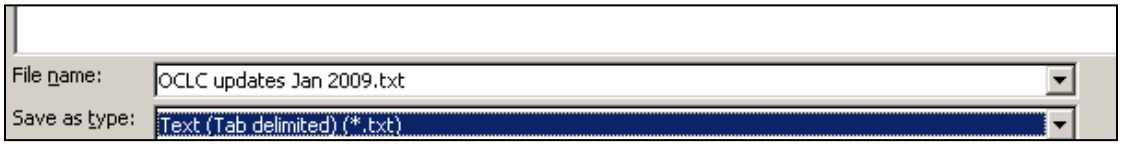
Delete unnecessary columns and headers:



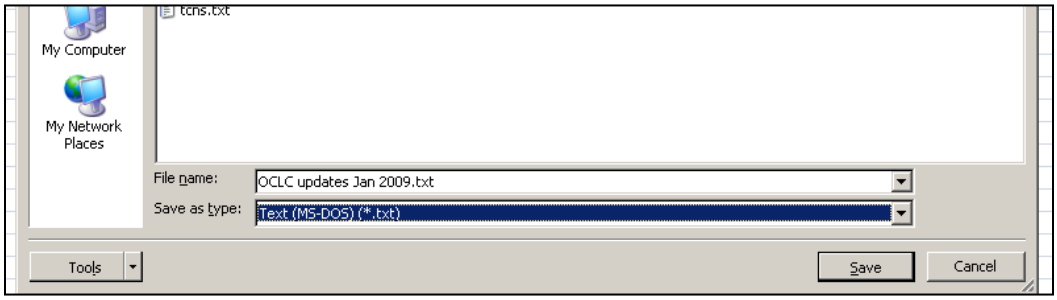
You can remove duplicated TCNs at this point if you want, but it is not really necessary.

OCLC's Connexion client limits files to 2500 search keys. If there are more than 2500 rows, you should break apart the file into smaller numbers. You can do this by either cutting or pasting into a word doc or into different sheets in the spreadsheet. You will need to save each sheet as a .txt file.

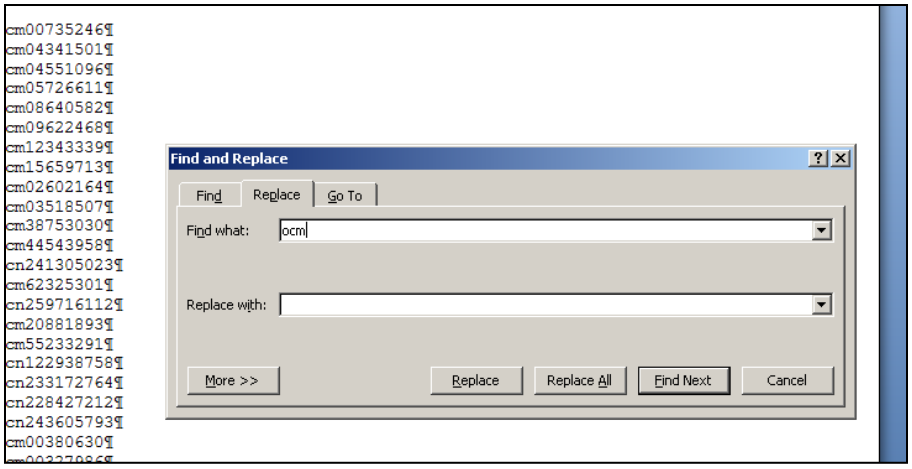
Then save as a .txt file (rename it something you will remember)



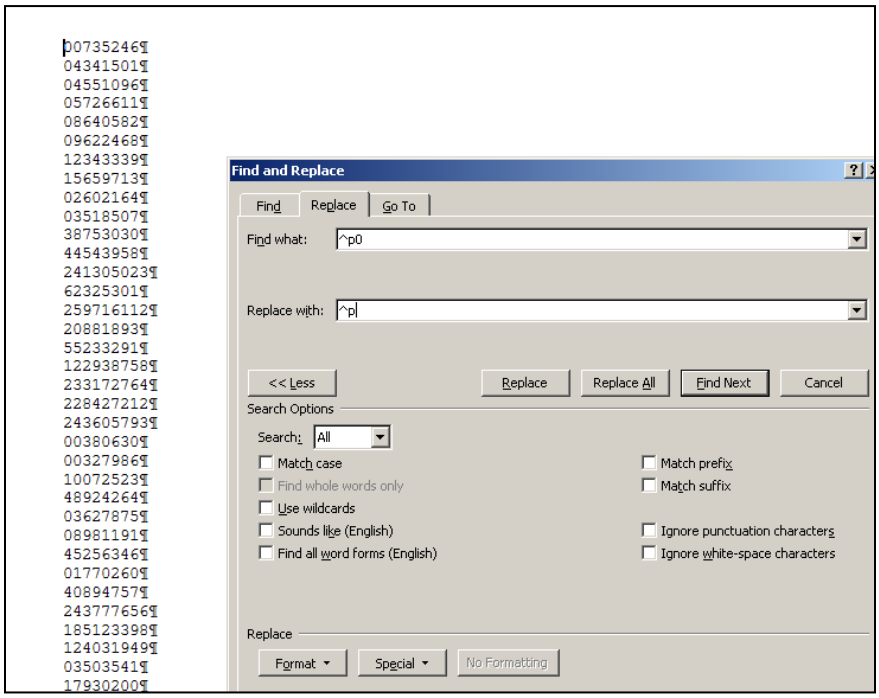
Or (your options may differ if you have a different version of Excel)



Remove all ocm and ocn prefixes:



Remove all initial 0s (zeros)



You may have to **Replace All** several times to remove them all.

Save and close your file.

You have created a file of OCLC title control or accession numbers and are now ready to batch process it in the Connexion client.

11.4.1.2 Batch process to update holdings in the Connexion client

Open the Connexion client offline. If you have not already done so, first set up your batch processing defaults.

In the **Tools** menu, select **Options**, then the **Batch** tab.

It is helpful to see a batch report after you have processed the file in the client. Click on the box to **Display batch reports automatically**. It you need the report printed each time, check the box **Print batch reports automatically**, otherwise, leave it unchecked.

The default number of matches downloaded is 1. Increase the number to insure you see all potential matches (the maximum is 100). It is also a good idea to check the boxes to retain your search keys.

Click on **Apply** when you are done.

Now you are ready to process your saved text file.

From the **Batch** menu, chose **Holdings by OCLC Number.**

Then **Browse** for your file and **Import** it.

Choose **No** when asked to delete your import file (you can delete it later, retain it now in case there is a problem with the batch process).

Once the TCNs are imported into the window, under **Action,** click on the radio button **Update Holdings** and uncheck the box **Set holdings if already held**.

Click on **OK**. The file will process in groups of 25. When it completes, if you have set up reports to be automatic, a batch report will display. The first section of the report is successful actions and the second section is errors. If the error is **Holdings already set,** you don't need to do anything else. Other errors might require further action.

You can now go back and investigate the records that did not have OCLC TCNs. While you can enter search keys and batch them, you should not automatically set your holdings since these search keys are likely to return multiple hits and records that do not match your title. You can also search for them and set holdings individually. Information on navigating the Connexion client can be found at OCLC. 2010. *Client documentation: Getting started*. Retrieved June 16, 2010 from http://www.oclc.org/us/en/support/documentation/connexion/client/gettingstarted/

If you wish to batch the search keys into your local save file, first make sure the save file is empty, then under the **Batch** menu, choose **Enter bibliographic search keys**.

Type your search key in the **Query** box and then **Add**. Once you have entered all of them **Save** (if you do not **Save** them they will be lost) Then **Close**.

From the **Batch** menu, choose **Process Batch**.

In the dialog box, check the box with the **Path** with the **File Name Defaultbib.bib.db** (you can check the box to **Retain file selection**).

Under **Process** check **Online searches**. You can also set the order the records will be returned, the **Bibliographic Processing Order**, if you need.

Click on **OK**. The file will process and, if you have set your options to automatically display the batch report, it will display. Check to see if any search keys failed. You can resolve those later.

To see the records returned, open your local save file either using the shortcut on the toolbar, **F3**, or from the **Cataloging** menu – **Search** – **Local Save File**.

Display the entire **Local Save File** by clicking on **OK** in the search box.

A list of the save file contents will be displayed. You may be able to scan the list and see records that are clearly not matches and delete those from the save file through the **Action** menu – **Delete Record** (**CTRL ALT D**) or the toolbar short cut.

Verify which of the remaining records are matches to your holdings and set them to update though the **Action** menu – **Holdings** -- **Update Holdings** (**F8**) or the toolbar short cut. You can delete the records from the **Local Save File** that aren't matches; but it isn't necessary.

Back in the **Batch** menu, choose **Process Batch** and then check the box for **Online Record actions**. Click **OK** and the system will update your holdings.

NOTE: The **Action, Produce,** and **Update Holdings** will print a card set for that record. Card sets come from OCLC and have a cost. Please avoid using **Produce.**

11.4.2 Deleting holdings in OCLC

After you have deleted the last item in your library system from a title record in the PINES database; it is recommended that you delete your holdings in OCLC to remain GOLD compliant and to assist your Interlibrary Loan staff so that they do not get requests for titles no longer owned by your library. As long as your library system retains one copy of a specific title, you do not need to delete your OCLC holding. Only delete your holdings in OCLC if you have removed the last copy of a title from your system. With the exception of the genealogical library at Middle Georgia Regional Library System, your holdings in OCLC are set for your library system and not individual branches. So do not delete your OCLC holdings if you remove all copies from one branch while retaining them in others.

You can run reports of items deleted from the PINES database; however, the reports will not indicate if it is the last copy so you would need to investigate further. Best practice is to record and retain information about the title as you delete. Depending on the number of titles removed from your collection at one time, it might also be advantageous to delete from OCLC as you go.

Those libraries that may have duplicate records may need to take care in determining last copy deleted. Your library may have multiple records for the same bibliographic entity.

11.4.2.1 Batch deleting holdings with OCLC title control numbers

If the record in PINES has an OCLC TCN (ocm12345678, ocm91123456, ocn428027070, etc.), create a .txt file of the numbers (remember to remove the ocm or ocn prefix along with any leading zeros). Follow the directions in the section on batch updating holdings, except choose **Delete Holdings**. After the file has processed, if you have set your options to do so, you will see a batch report. Follow up on any problems if necessary.

11.4.2.2 Batch deleting holdings without OCLC title control numbers

If the PINES record was not an OCLC record and therefore lacks an OCLC TCN, (i123456789X, l860123456, PIN1234567891, etc.), you can enter search keys in the clients batch processing to find the record in OCLC with your holdings attached. To build a set of search keys in batch, follow the directions found in the OCLC documentation:

OCLC. 2010. *Client documentation: Getting started*. Retrieved June 16, 2010 from http://www.oclc.org/us/en/support/documentation/connexion/client/gettingstarted/

Do not automatically set the batch processing to delete holdings since you will need to investigate to make sure you have retrieved the correct MARC record.

The search keys will likely return multiple records so you will need to investigate to determine which record is held by your library.

If you wish to batch the search keys into your local save file, first make sure the save file is empty, then under the **Batch** menu, choose **Enter bibliographic search keys**.

Type your search key in the **Query** box and then **Add**.

Once you have entered all of them **Save** them (if you do not save them they will be lost) Then **Close**.

From the **Batch** menu, choose **Process Batch**.

In the dialog box, check the box with the **Path** with the **File Name Defaultbib.bib.db** (you can check the box to **Retain file selection**).

Under **Process** check **Online searches**. You can also set the order the records will be returned, or the **Bibliographic Processing Order**.

Click **OK**. The file will process and, if you have set your options to automatically display the batch report, it will display. Check to see if any search keys failed. You can resolve those later.

To see the records returned, open your local save file either using the shortcut on the toolbar, **F3**, or from the **Cataloging** menu – **Search** – **Local Save File**.

Display the entire **Local Save File** by clicking on **OK** in the search box. A list of the save file contents will be displayed.

You can sort by whether the record returned is held by your library by clicking on the column **Held.** If you wish, you can delete the records not held from the **Local Save File** through the **Action** menu – **Delete Record** (**CTRL ALT D**) or the toolbar short cut. Or you can leave them in the Local Save File for later investigation.

Verify that the remaining titles are the ones on your list to delete holdings, removing any that are not. Also verify titles on your list that are not in the **Local Save File**, you can resolve those later.

Back at the list, highlight the remaining titles.

Then, in the **Action** menu choose **Holdings** then **Delete Holdings**. An **R** will be placed in the column **Delete Holdings** (you may need to scroll right to see it).

In the **Batch** menu, choose **Process Batch** and then check the box for **Online Record actions**.

Click **OK** and the system will delete your holdings.

For those titles to be deleted, but not marked as Held in OCLC, you can investigate individually along with any titles whose search keys failed.

NOTE: Because of the lack of information in some PINES records sent to OCLC when holdings were re-set during the GeorgiaCat project, records may not have been machine matched so your holdings may not have been updated on an OCLC record for some titles.

11.4.2.3 Deleting holdings individually

If you have few deletes, you can delete holdings one at a time while signed into OCLC. This is particularly helpful for records with little information, making it difficult to construct useful search keys for batching.

Log on to the Connexion Client or the Connexion web browser.

Search and locate the matching record. If it is not **Held** by your library, no action is needed.

If it is **Held** by your library, from the **Action** menu under **Holdings**, then **Delete Holdings.**

Chapter 12 Spine and Pocket label printing for Dot Matrix Printers

Spine and pocket labels can be printed from several places in Evergreen, depending on the needs of your workflow. You can print labels, either single or multiple, as you add your copies to a record or you can batch print labels at any time after the copy is added.

Before you begin printing labels, you need to make sure your computer is set up to print with the necessary label stock and with the proper printer settings both in Evergreen and in Windows. You may need assistance from your local system administrator or IT people in order to get your computer set up for printing. You may also need to experiment until you find the correct settings for your printer. These directions should help guide you through the process.

12.1 Dot Matrix Spine Label Printers

Evergreen spine label printing has been tested and the defaults set for an OKI MICROLINE 320 Turbo 9 Pin Printer using SP1 (one spine label) stock. The driver needed for this printer is already included with Windows XP. The driver will be labeled "Oki Data ML 320 Turbo/D (DEC)" in Windows. If your operating system differs, go to http://okidata.com/, click on their "Drivers" link and choose "Dot Matrix Printer" for their technology field and "ML320Turbo-D" for the printer model, and then proceed to find the correct driver for your operating system.

12.2 Spine Label Printing

12.2.1 Setting up Spine Label Printing

12.2.1.1 Creating Custom Forms in WindowsXP for Spine Label Stock

12.2.1.1.1 SP1 Label Stock

You will need to create a custom form or page type for your SP1 stock.

1. Click on **Start**-- **Printers** and **Faxes – File** -- **Server Properties** (or right click anywhere on blank space in the **Printers and Faxes** window and click on **Server Properties**).
2. Check **Create New Form**.
3. Under **Form Description** (**Measurements**), make sure **English Units** are selected.
4. Set the **Form Name** to "sp1" (or another name of your choosing).
5. Type in the following measurements (these seem to work for most label stock):

Width: 3.00 **Left**: 0.00 **Top**: 0.00
Height: 2.00 **Right**: 0.00 **Bottom**: 0.00

6. Click **OK**.

12.2.1.1.2 Other label stock

1. Click on **Start** -- **Printers and Faxes** --**File** -- **Server Properties** or right click anywhere on blank space in the **Printers and Faxes** window (see above).
2. Check **Create New Form**.
3. Under **Form Description** (**Measurements**), make sure **English Units** are selected.
4. Type in the following measurements (these seem to work for most label stock):

Width: 5.00 **Left**: 0.00 **Top**: 0.00
Height: 1.50 **Right**: 0.00 **Bottom**: 0.00

5. Give your form a name (like Labels or Spine labels) and click on **OK** to save your new form.
6. See above to link newly created form to your printer.

12.2.1.2 Linking the Printer to the Custom Form in WindowsXP

1. Click on **Start** -- **Printers and Faxes**.
2. Right click on your printer and choose **Printer Preferences**.
3. Choose **Paper/Quality** tab.
4. For dot matrix printer, choose **Tractor Feed** at drop-down menu.
5. Click **Advanced.**
6. In the **Paper Size** field, choose your custom form, “sp1” or your custom name.
7. Click **Apply** and **OK**.

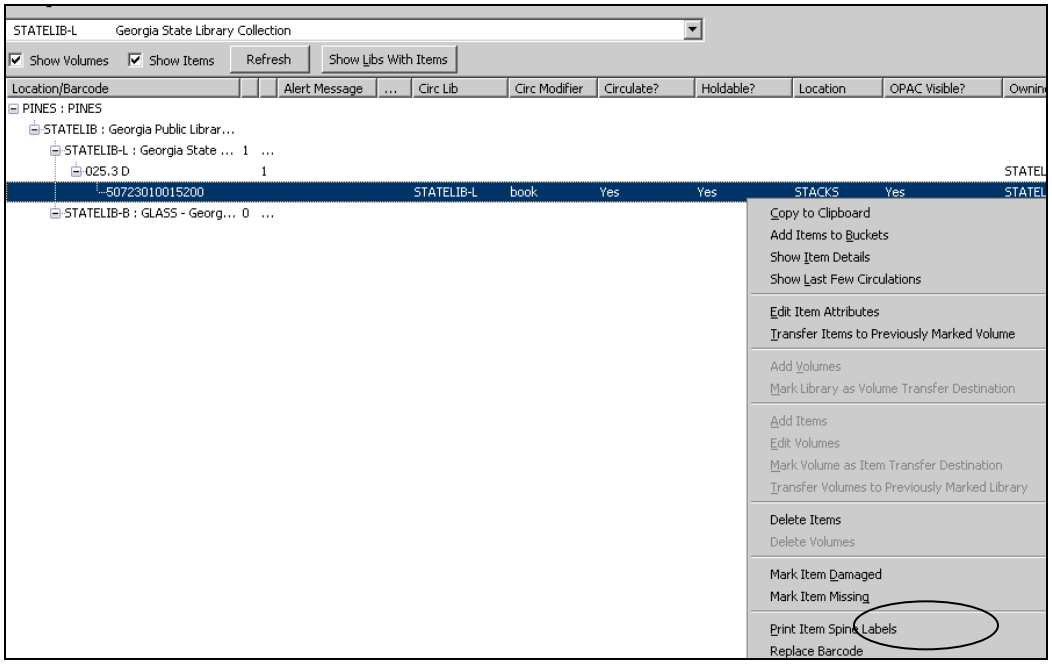
12.2.1.2. Settings for Evergeen Staff Client

12.2.1.2.1 Setting Up a Label Printer in Evergreen

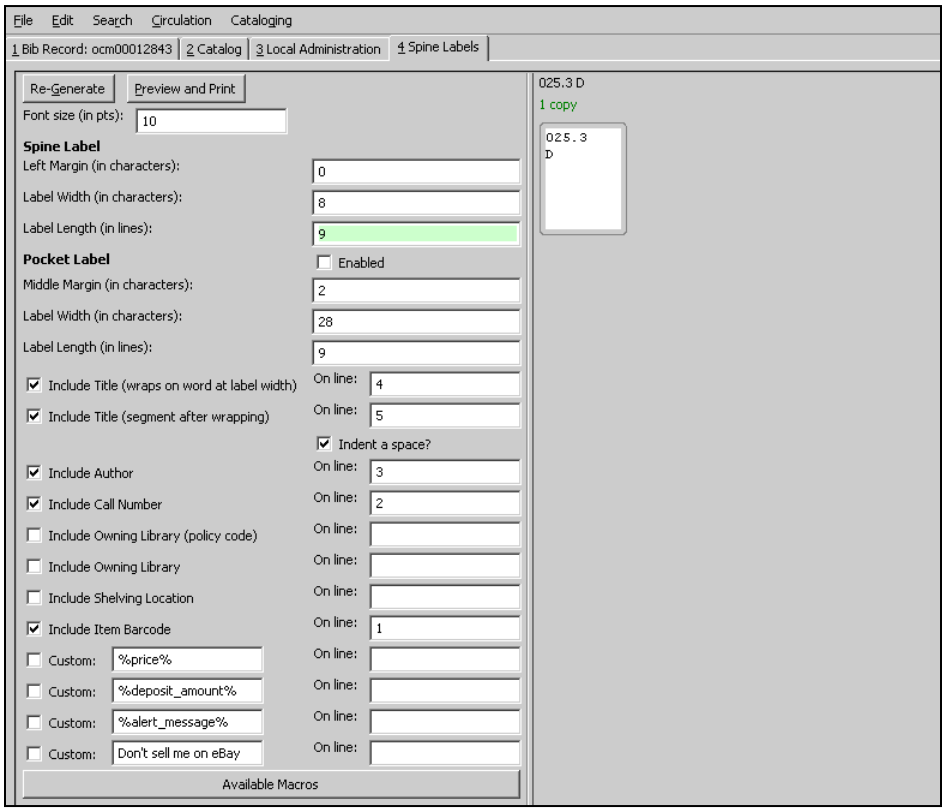
1. In Evergreen, go to **Admin** -- **Local System Administration**. Then, under **Workstation Configuration**, choose **Printer Settings Editor**.
2. Click on **Set Default Printer and Print Test Page** button (make sure your printer is off if you don’t want to print a test page).
3. Pick the correct printer, probably Okidata ML 320 Turbo/D (IBM).
4. Click on **Properties** and make sure **Tractor Feed** is chosen.
5. Click on the **Advanced** button and at **Paper Size** choose your new form.
6. Click on **OK** twice to set changes.
7. Choose **Page Setup** from the printer settings editor.
8. Choose the tab **Margins & Headings/Footer**, set the left margin to .2, and click **OK**.

12.2.1.2.2 Adjusting Settings in the Spine Label Interface for Label Stock.

1. Pull up an existing record in Evergreen.
2. In **Holdings Maintenance**, highlight an item and, either from the actions for selected rows menu or right clicking on the item, choose **Print Item Spine Label**.



3. The spine label printing interface will open in a new tab:



4. For SP1 labels, set the **Font Size** to 10, the **Left Margin** to 0, the **Label Width** to 8, and the **Label Length** to 9.

For other label stock, you may need to experiment with different settings to find the correct left margin, width, and length. Common settings are **Left Margin** 6, **Label Width** 8, **Label Length** 6.

5. Click on **Regenerate** to save changes and to reset label to those settings.
6. Click on **Preview and Prin**t to print labels and test settings.

If the printer skips a label, first adjust the label length. If it is off by one, it can cause the printer to form feed multiple labels. If this does not solve the label skipping, go back to the Printer Settings Editor and:

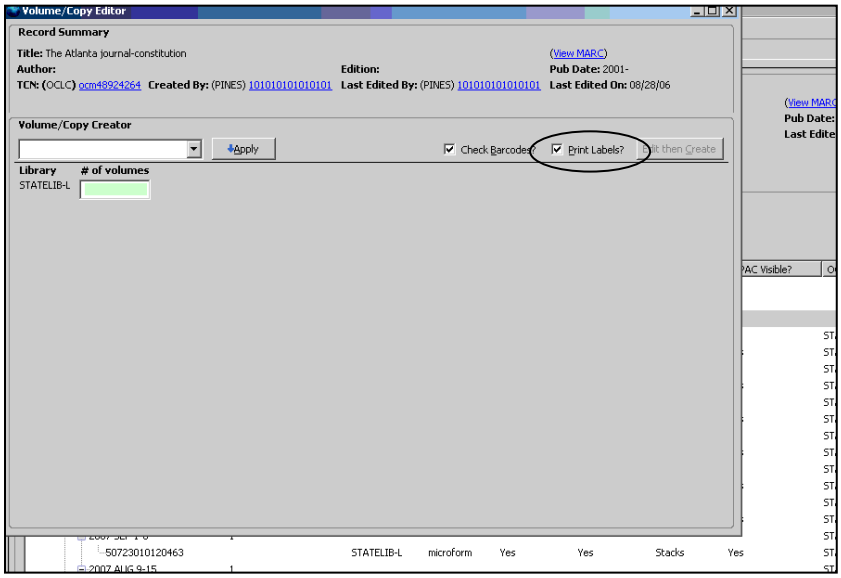
1. Click on the **Page Settings** button
2. Choose the **Margins & Header/Footer** tab
3. Set the **Top Margin** to 0.1

12.2.2 Printing Spine Labels

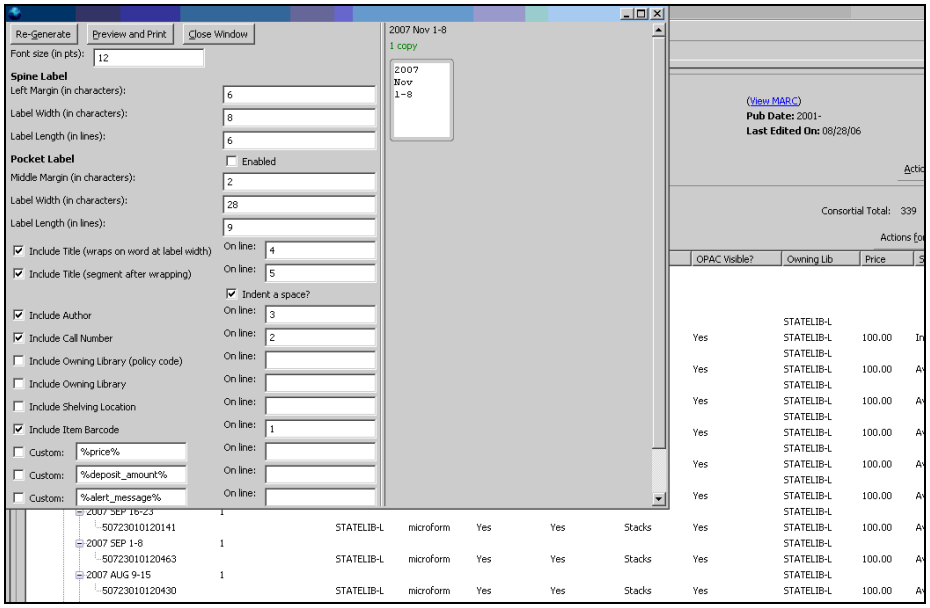
Spine labels may be printed when initially adding volumes or copies, for existing copies from the **Holdings Maintenance** Interface, or in batch for items by barcode.

12.2.2.1 Printing as You Add Volumes/Copies

In order to print spine labels as you add volumes and/or copies, make sure the **Print Label** box for printing spine labels is checked on the **Volume/Copy Creator** page before you click on **Edit** or **Create**:



After you have added your volumes/copies, the spine label interface will launch, allowing you to edit and print the spine label(s):

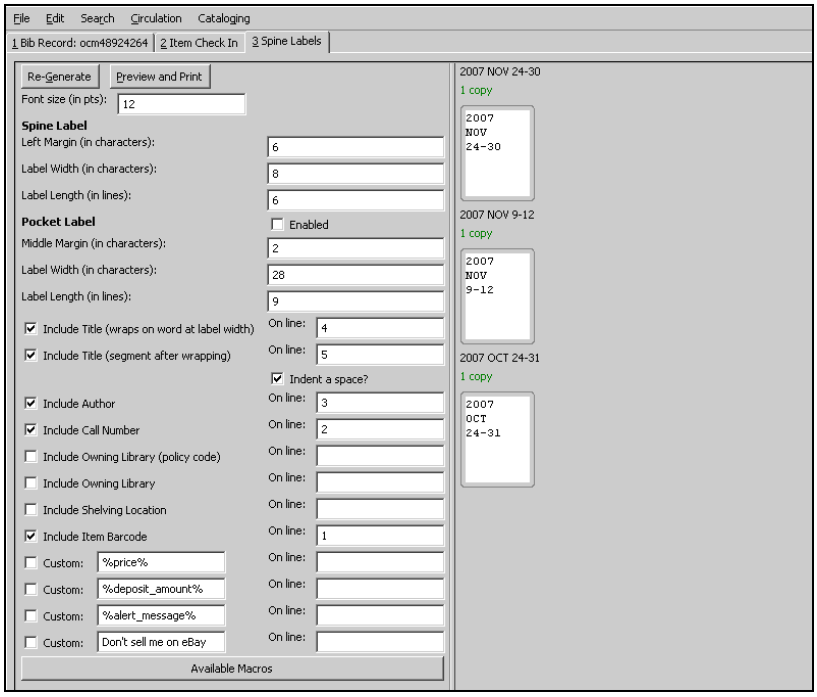


If you make any changes to the font size, margins label width or length; you will need to click on **Re-Generate** to apply those changes.

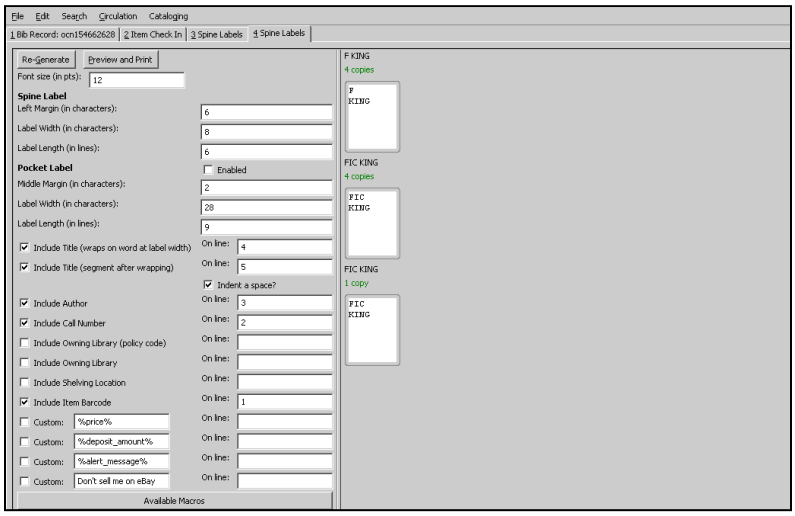
The **Close Window** button closes this window without printing (or saving changes if you have not regenerated the label display).

You can edit the call number at this point so that it fits on your label and the spine of the book, wrapping long call numbers as needed. Click on the line to be edited and the box will highlight in green. The call number associated to the item record will not be changed by any editing you do at this interface. For convenience, the call number is above the editing screen, along with the number of copies of label to be printed.

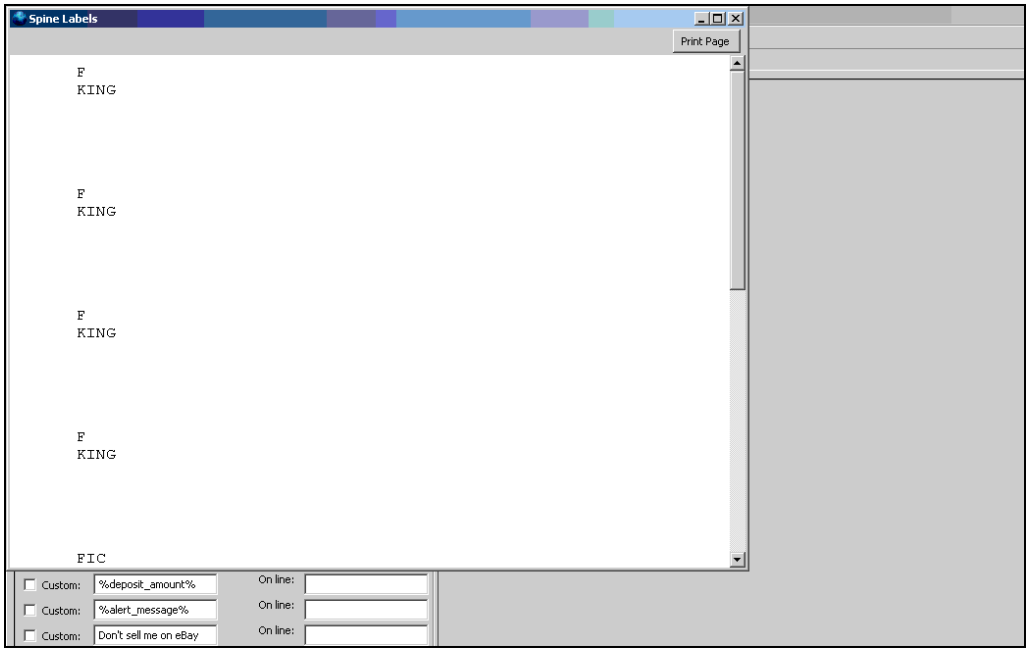
If you have added multiple volumes or copies, your screen will look more like this:



Illustrated in the window below, are labels for multiple copies on each of two volumes added and a single copy added on another. Three label mock-ups are displayed, but over each is the number of labels for that call number that will be printed.



When you are ready to print all the labels, click on the **Preview and Print** button. A page showing the print layout will be launched.

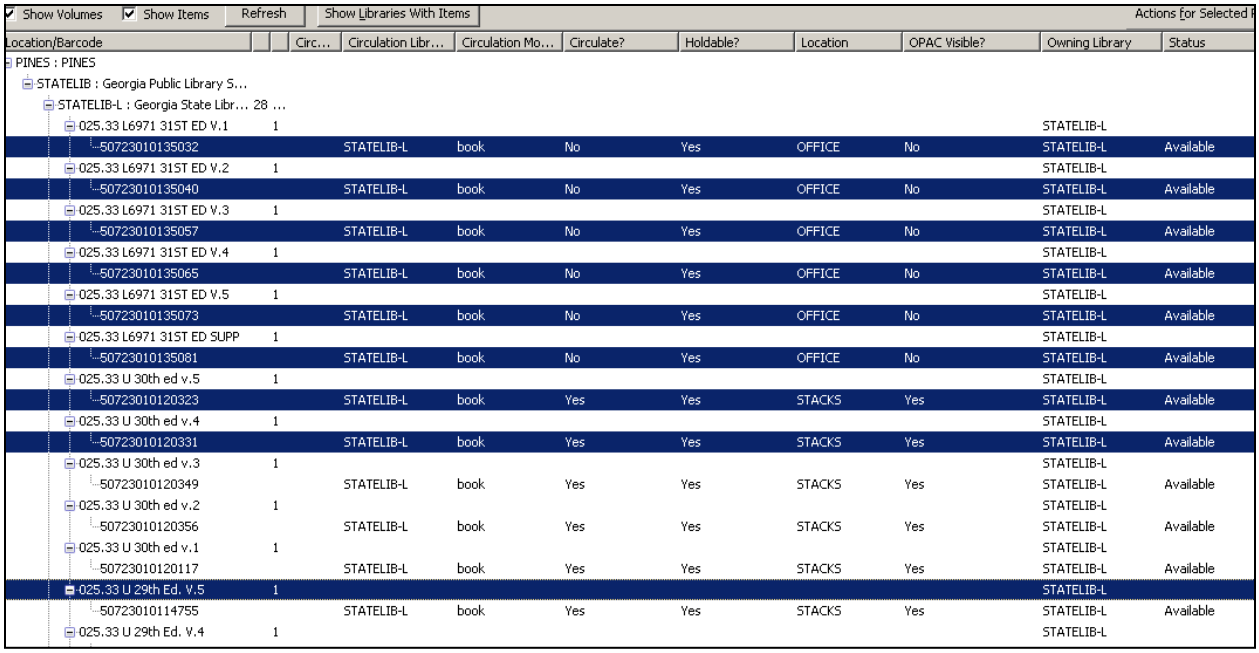


You can scroll down and check the layout of your call numbers. If you see a problem, close the window without printing by clicking on the **X** in the right hand corner. Make any changes you need and launch the preview pane again. When you are ready to print, click on the **Print Page** button.

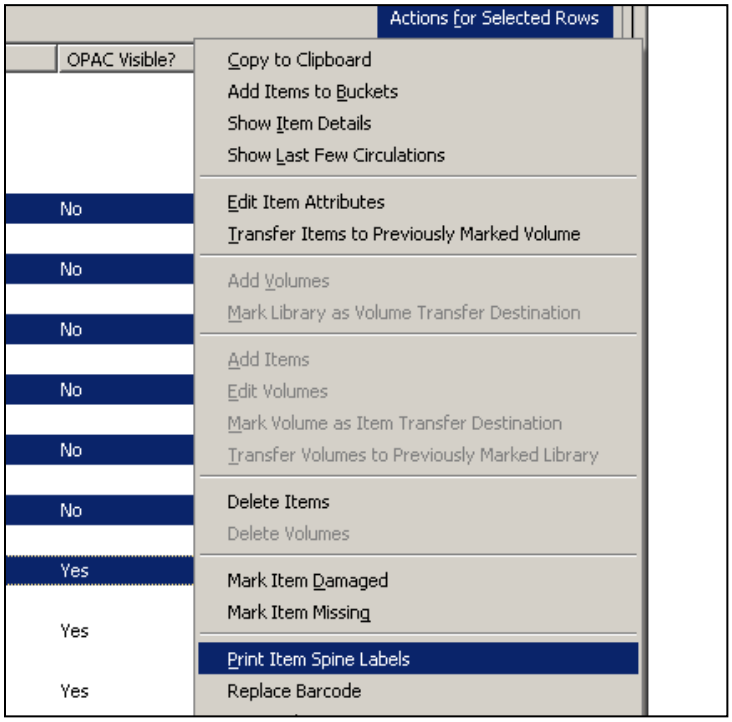
The printer dialog box will open. Verify it is set to the correct printer and click **OK**. Your label(s) should print.

12.2.2.2 Printing Labels for Existing Volumes

For spine labels from a single title record, with that title record in **Holdings Maintenance**, you can print either one label or multiple labels. To do so, display and highlight, at the item level, the call numbers for which you need labels. If you need to print labels for items in a direct line, highlight either the first item, volume or library name, and then, while depressing the **SHIFT** (or **CTRL SHIFT**) key, left click on the final item. All items in between should be highlighted and the **Print Spine Labels** action will only apply to the selected item rows, ignoring the selected non-item rows. If the items you need to print labels for are not contiguously displayed on the screen, hold down the **CTRL** key as you left click with your mouse on each item. Only those item rows you click on will be highlighted and actionable by the command:



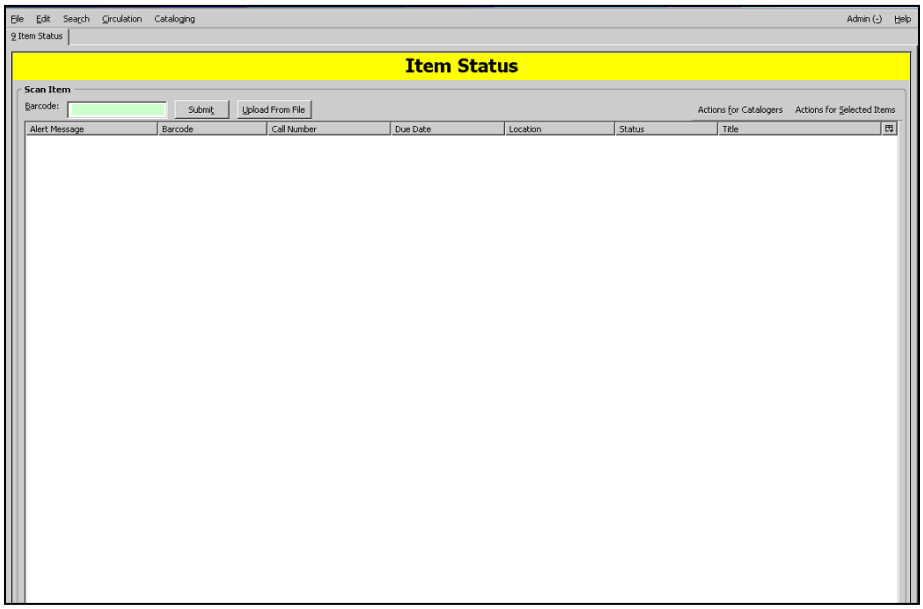
Then, either from the **Actions for Selected Rows** button or right clicking, choose **Print Item Spine Labels**



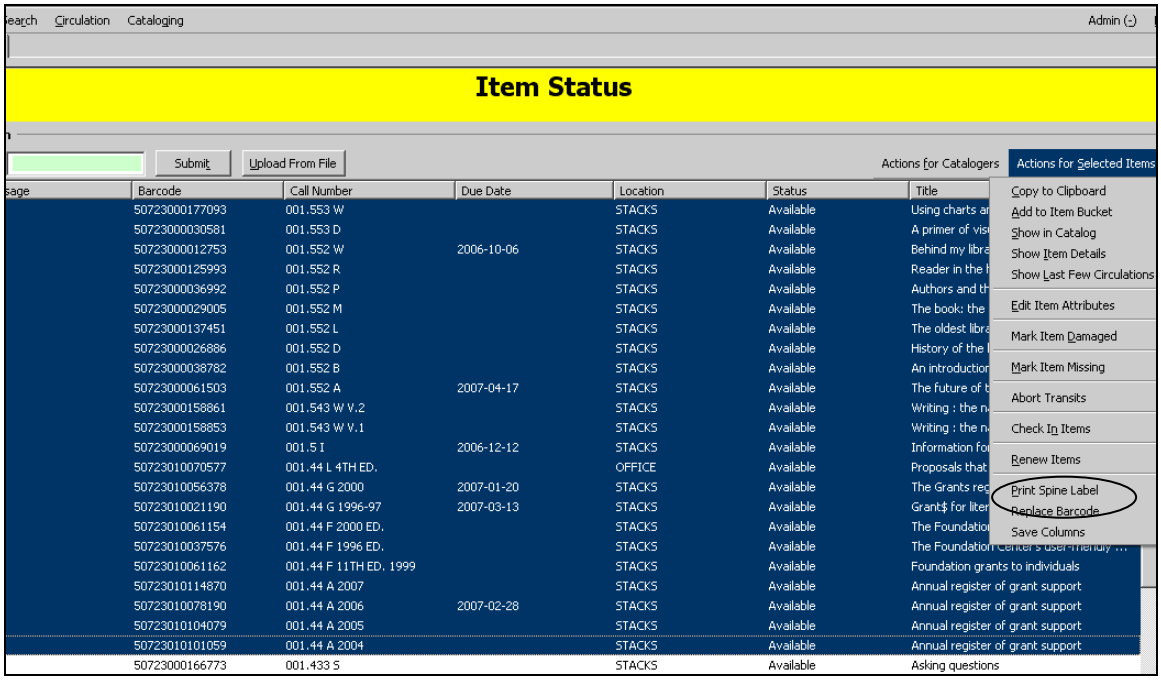
A new tab with the spine label dialog window will launch. Instructions are the same as in printing as you add volumes/copies from this point.

12.2.2.3 Batch Printing Spine Labels

Evergreen allows for batch printing labels for more than one title record at a time after items have been added using the Item Status interface. There are several ways you can add items to this display. The most direct way is to open the interface by either going to **Cataloging -- Display Item**, pressing **F5**, or **Circulation -- Show Item Status by Barcode**, or **Search** -- **Show Item Status by Barcode.** The display will open in the tab you have on top.



1. Scan or type in each barcode or upload a file of barcodes, clicking on the **Submit** button or pressing the **Enter** key after each one (unless your scanner is programmed with a carriage return).
2. After you have populated the display with all the items, select them all by left clicking the first one and then **SHIFT CTRL** left-click or **SHIFT**+left-click on the last entry.
3. Right-click on one of the highlighted lines or open the **Actions for Selected Rows** menu and choose **Print Spine Label**.



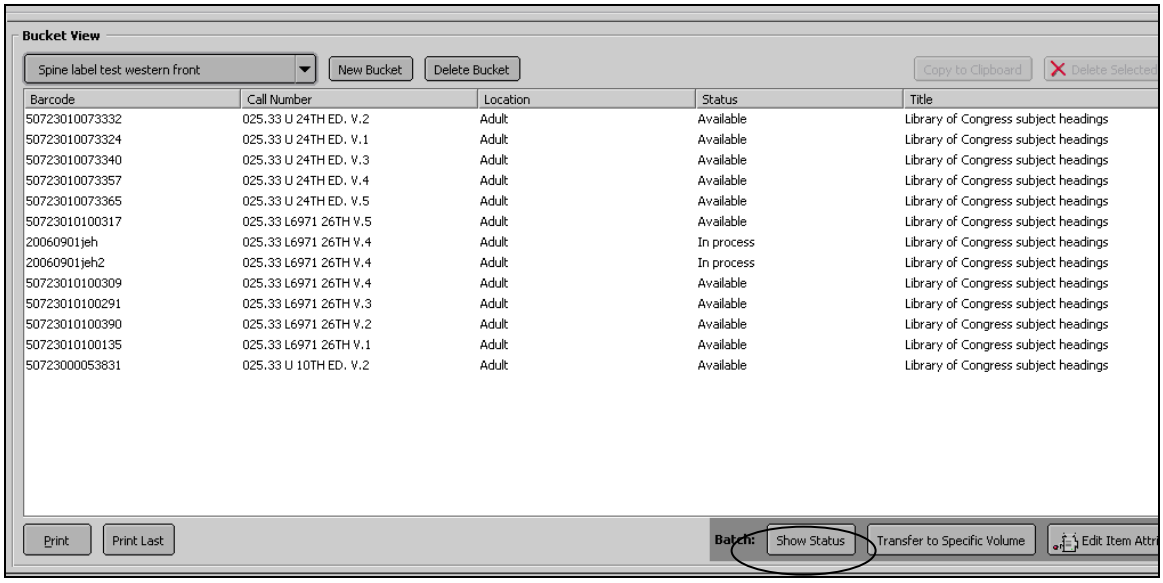
4. The spine label interface will open in a new tab. From this point, follow the directions for printing from above.

12.2.2.3.1 Using a Copy Bucket to Move Items to the Copy Status Interface

You can also add items to a **Copy Bucket** and move them from the **Copy Bucket** to the **Item Status** interface. This may be useful when you know which existing items need new spine labels but they are not in hand. For example, you want to print the labels and send them to a branch to be placed on the items. You can also have the branch library scan in the barcodes from the items into a shared copy bucket.

12.2.2.3.2 To Add Items to a Copy Bucket From Holdings Maintenance

In **Holdings Maintenance** for the title record, select the items you need. Right click or use the **Actions for Selected Rows** menu and choose **Add Items to Bucket**. A dialog box will open. Either create and name a new bucket or pick an existing bucket to use. If you add to a new bucket, be sure to give it a distinctive name. You can also make a shared bucket. Continue adding items as needed from different title records. When you are done, open your copy bucket by going to **Cataloging -- Manage Copy Buckets**. Open your bucket. Click on **Show Status** from the **Batch** options



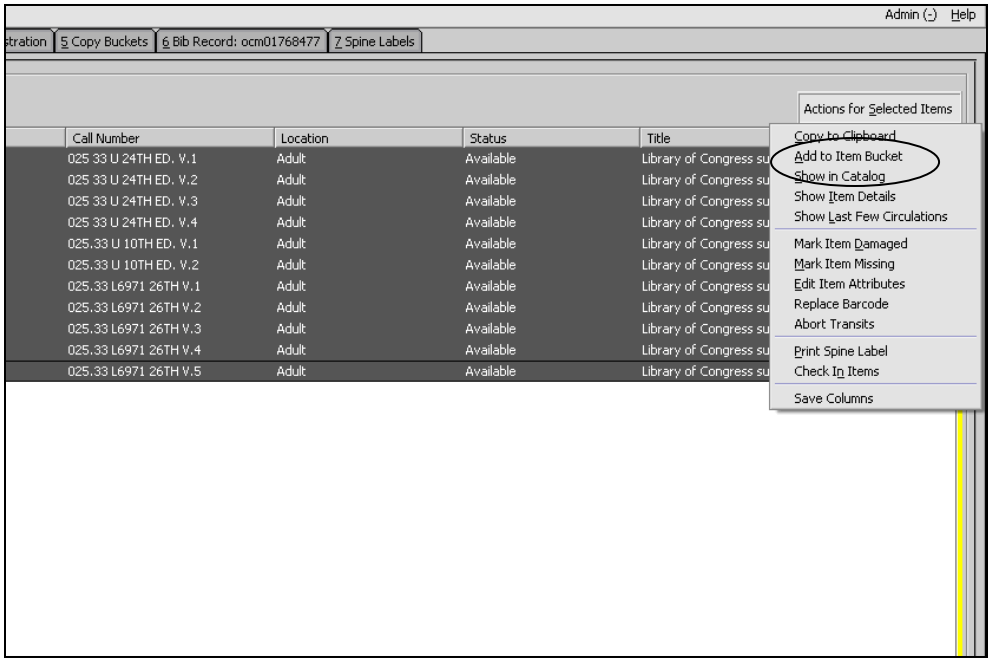
The **Show Copy Status** display will open in a new tab. Follow the directions for printing spine labels above.

12.2.2.3.3 To Add in Display Item and Transfer to an Item/Copy Bucket

If you have a project to change call numbers at a branch, but don't need to see the items (perhaps you are adding a new prefix or combining your short story collection with your regular fiction), you can have a branch add the items to a shared copy bucket.

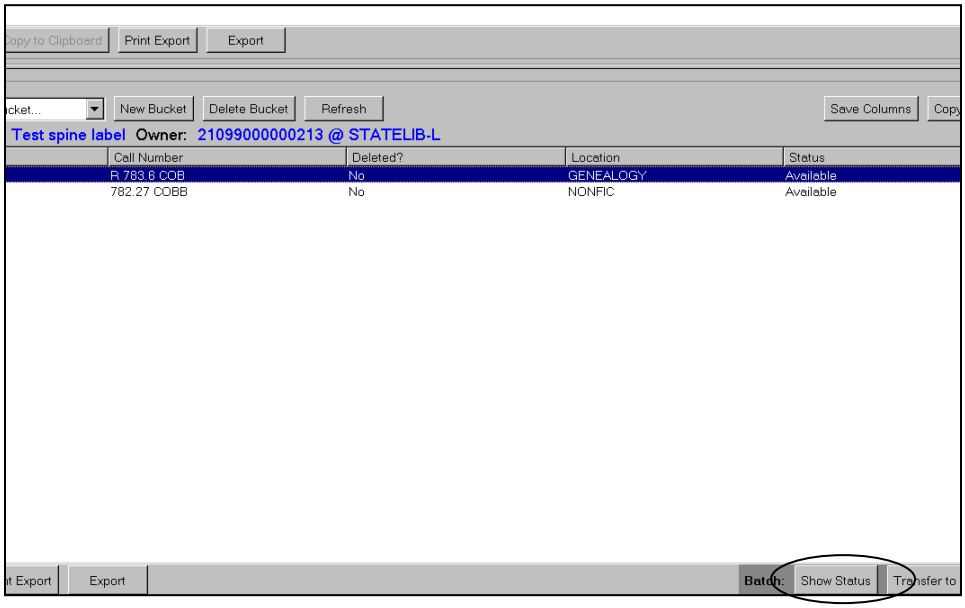
After changing the call numbers in the record (it is always best to have the item in hand; however, the realities of workflow may mean that you cannot), you can then transfer the bucket to the **Display Item** interface, **Print The Spine Labels,** and send them to your branch for them to match them with the items and replace the old labels. Care does need to be exercised with a project of this scope since it would be very easy to put the incorrect label on a book.

At the branch, someone first scans the items into the **Display Item** interface. They then select all the items and, under actions for selected items, choose **Add to Item Bucket**:

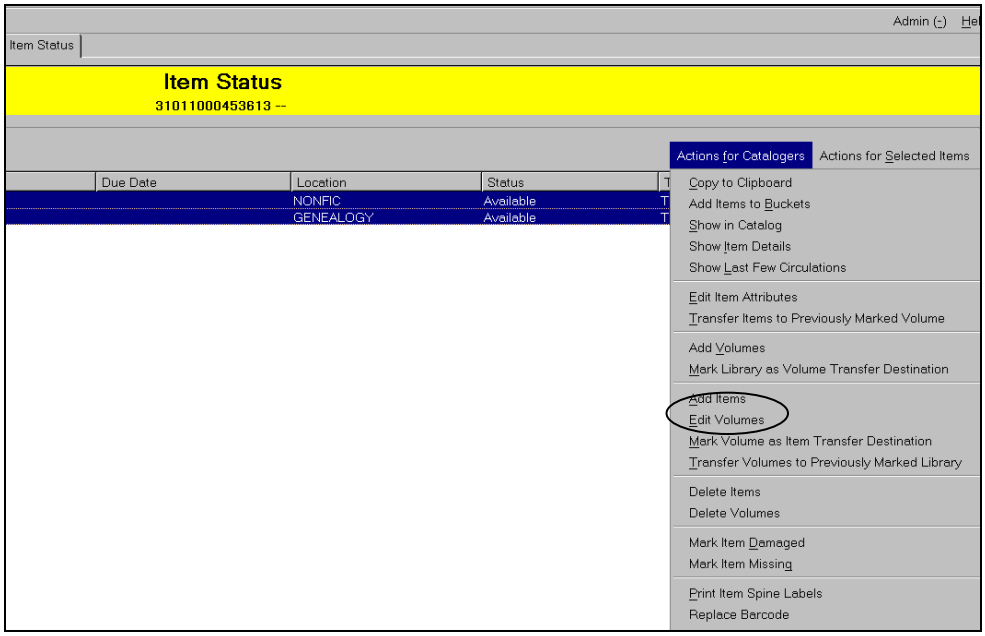


The items are then added to either a new shared bucket or a previously created one.

From this bucket, you can then transfer the list to the **Item Status** interface using the **Show Status** button:



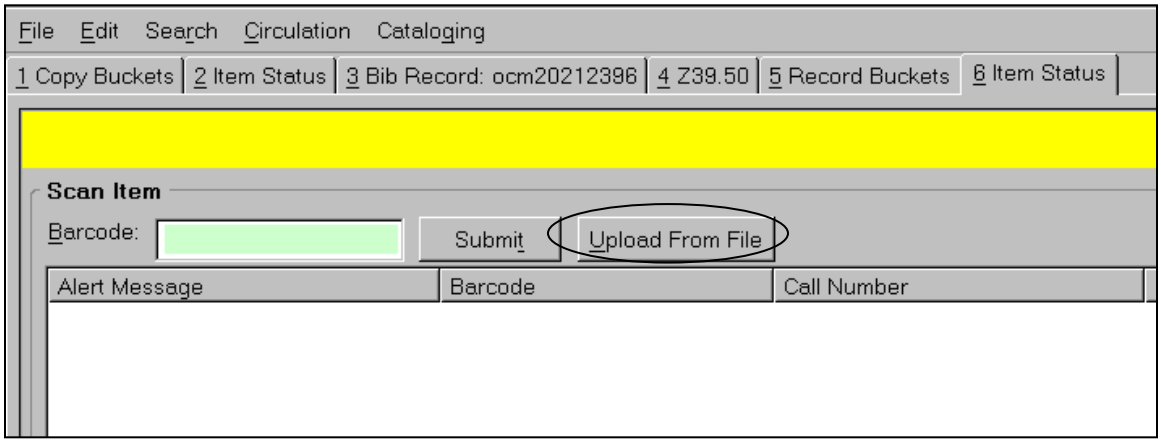
Depending on the kind of editing you need to do to the call number, you can either edit from here or pull up each record in the catalog and edit from **Holdings Maintenance**. To edit from this list, highlight the items and, then, from the **Actions for Catalogers** button, choose **Edit Volumes**:



When finished, click on **Modify**.

After you've edited all the call numbers, you can then follow the directions above to print out the labels.

You can also create a text file (txt) of barcodes rather than using the **Copy Bucket** and upload the file into the **Item Status** interface.



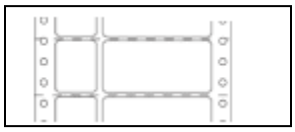
12.3 Printing Pocket Labels

If you include pocket labels on your items you can set up Evergreen to print them as the spine labels are printed. You will need to set up both Evergreen and your computer for the label stock you use.

12.3.1 Creating Custom Forms in WindowsXP for Spine/Pocket Label Stock

12.3.1.1 Label Stock

You will need to create a custom form or page type for your pocket label stock. In general, pocket labels are printed with an accompanying spine label. No standard stock has been defined for printing these labels in Evergreen. The carrier height and width varies for the stock depending on vendor and style. If your vendor does not provide the information, you will need to measure the labels. To create the custom form in Windows, you will need to measure the section of the continuous label stock and not the label itself.



Once you have determined the dimensions, you can create the custom form.

1. Click on **Start** -- **Printers and Faxes** -- **File** -- **Server Properties** (or right click anywhere on blank space in the **Printers and Faxes** window and click on **Server Properties**).
2. Check **Create New Form**.
3. Under **Form Description** (**Measurements**), make sure **English Units** are selected.
4. Set the **Form** name a name of your choosing.
5. Type in your measurements. For example :

Width: 4.50 Left: 0.00 **Top**: 0.00
Height: 1.40 Right: 0.00 **Bottom**: 0.00

<u>Or</u>

Width: 3.75 Left: 0.00 **Top**: 0.00
Height: 1.33 Right: 0.50 **Bottom**: 0.00

6. Click OK.

12.3.1.2 Linking the Printer to the Custom Form in WindowsXP

1. Click on **Start** -- **Printers and Faxes**.
2. Right click on your printer and choose **Printer Preferences**.
3. Choose **Paper/Quality** tab.
4. For dot matrix printer, choose **Tractor Feed** at drop-down menu.
5. Click **Advanced**.
6. In the **Paper Size** field, choose your custom form name.
7. Click **Apply** and **OK**.

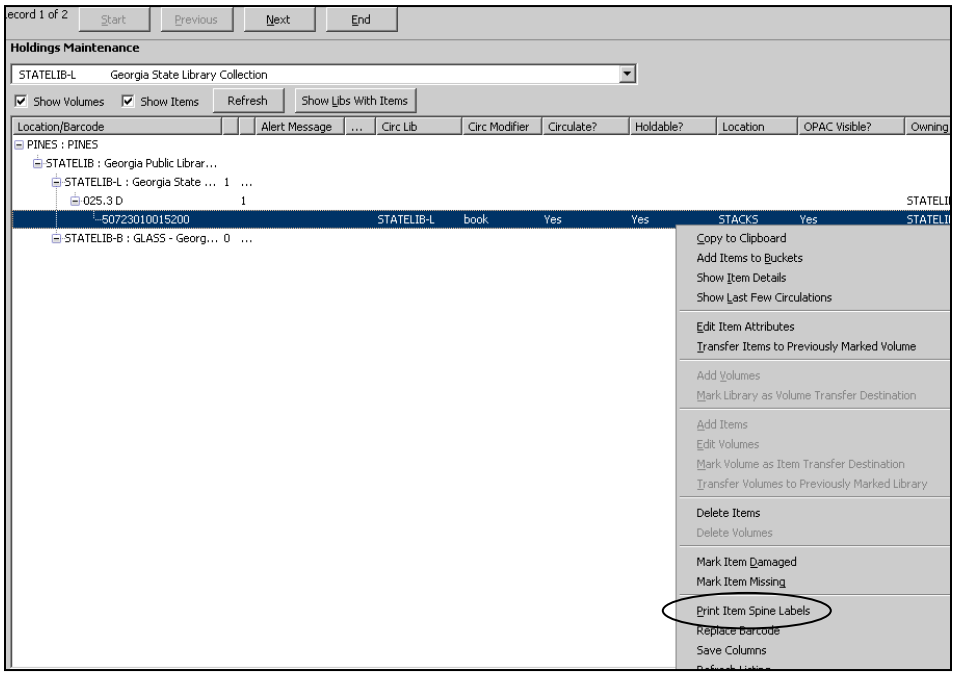
12.3.2 Settings for Evergreen Staff Client

12.3.2.1 Setting Up a Label Printer in Evergreen

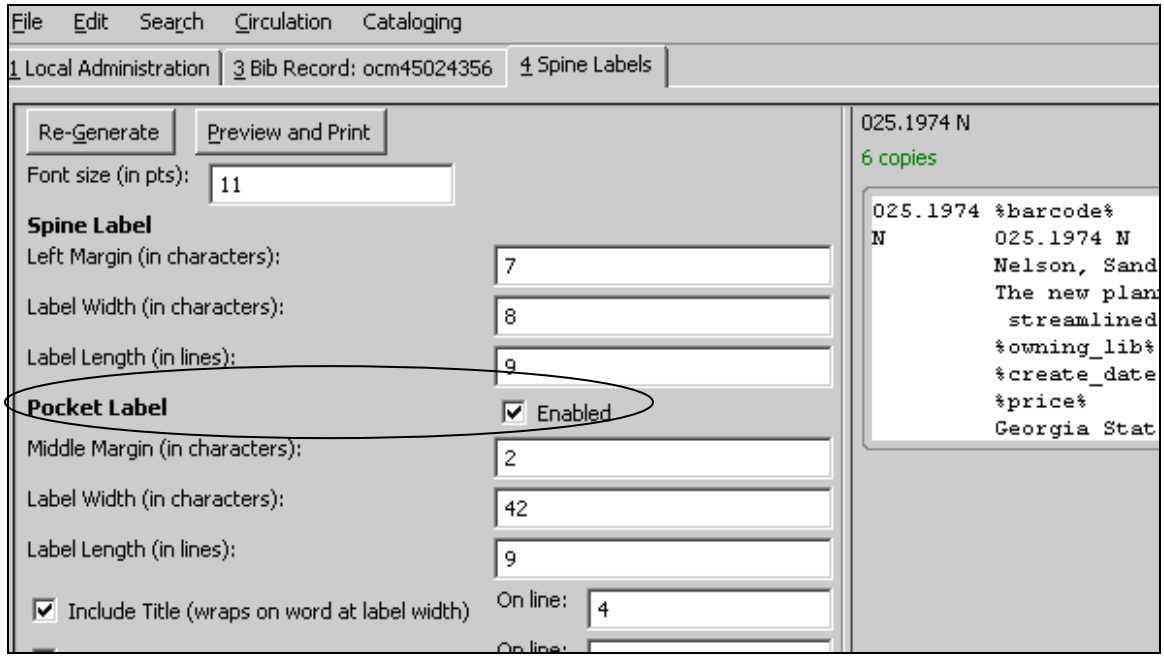
1. In Evergreen, go to **Admin** -- **Local System Administration**. Then, under **Workstation Configuration**, choose **Printer Settings Editor**.
2. Click on **Set Default Printer and Print Test Page** button (make sure your printer is off if you don't want to print a test page).
3. Pick the correct printer, probably Okidata ML 320 Turbo/D (IBM).
4. Click on **Properties** and make sure **Tractor Feed** is chosen.
5. Click on the **Advanced** button and at **Paper Size** choose your new form.
6. Click on **Ok** twice to set changes.
7. Choose **Page Setup** from the printer settings editor.
8. Choose the tab **Margins & Headings/Footer**, set the **Left Margin** to .2, and click **OK**.

12.3.2.2 Adjusting Settings in the Spine Label Interface for Label Stock.

1. Pull up an existing record in Evergreen.
2. In **Holdings Maintenance**, highlight an item and, either from the **Actions for Selected Rows** menu or right clicking on the item, choose **Print Item Spine Label**.



3. The spine label printing interface will open in a new tab. To set up the spine label printing interface for printing pocket labels, be sure that the **Pocket Label** box is checked to enable pocket label printing:



4. You may need to experiment with different settings to find the correct **Left Margin**, **Width,** and **Length** for the pocket labels. Common settings are **Left Margin** 5, **Label Width** 28, **Label Length** 6.
5. Click on **Re-Generate** to save changes and to reset label to those settings.
6. Click on **Preview and Print** to print labels and test settings.

If the printer skips a label first adjust the label length. If it is off by one, it can cause the printer to form feed multiple labels. Some users have reported that, when printing pocket labels, the label length must be one more than the actual length. If this does not solve the label skipping, go back to the **Printer Settings Editor** and:

1. Click on the **Page Settings** button
2. Choose the **Margins & Header/Footer** tab
3. Set the **Top Margin** to 0.1

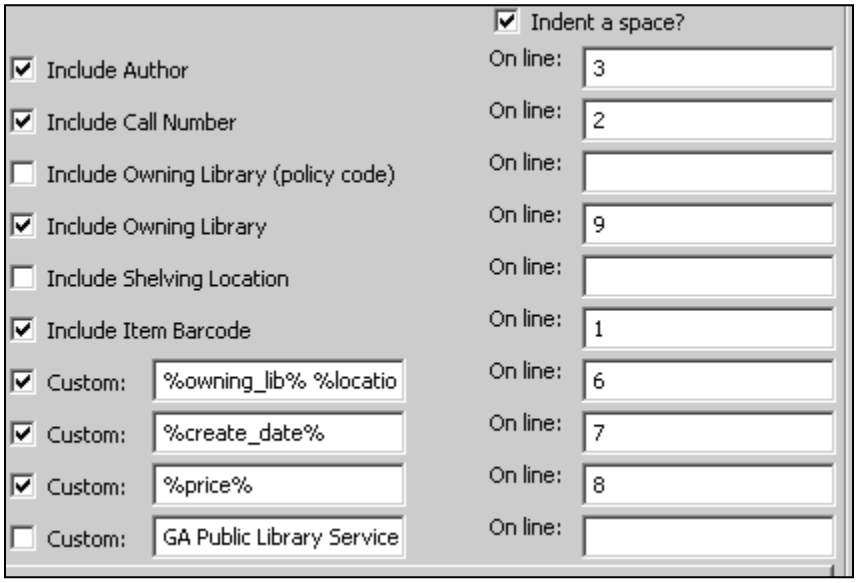
12.3.2.3 Populating the Information Fields for the Pocket Label

There are several pre-programmed fields of information provided on the interface template. These include:

Title
Author
Call number
Owning library (policy code)
Owning Library
Shelving location
Item Barcode

There are four further fields for custom information using either macros or specific text. The available macros can be viewed by clicking on the **Available Macros** bar.

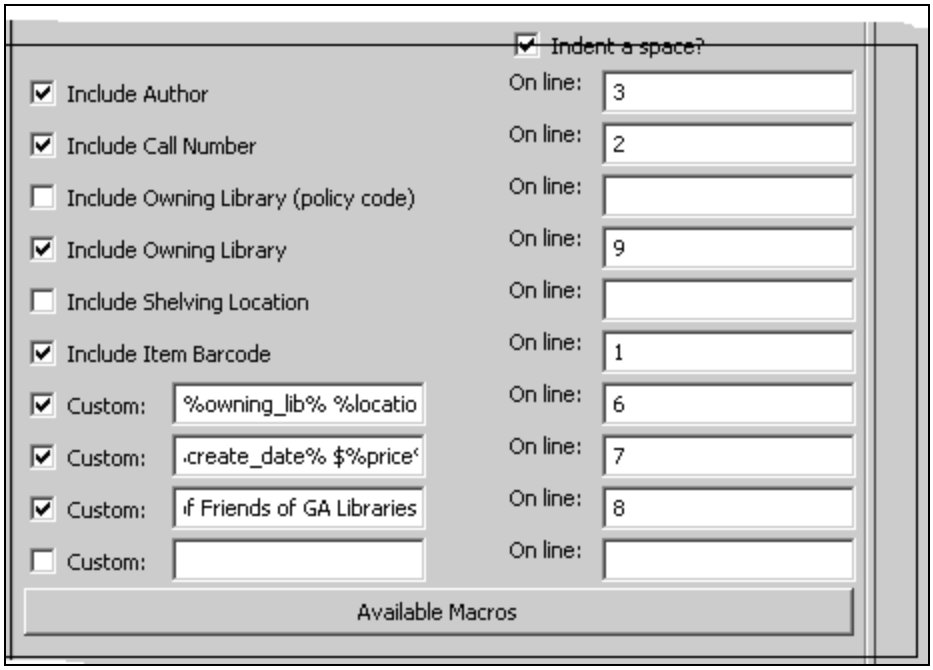
To add a field to the label, you must both check the box for the field and provide the line number on the label for the field.



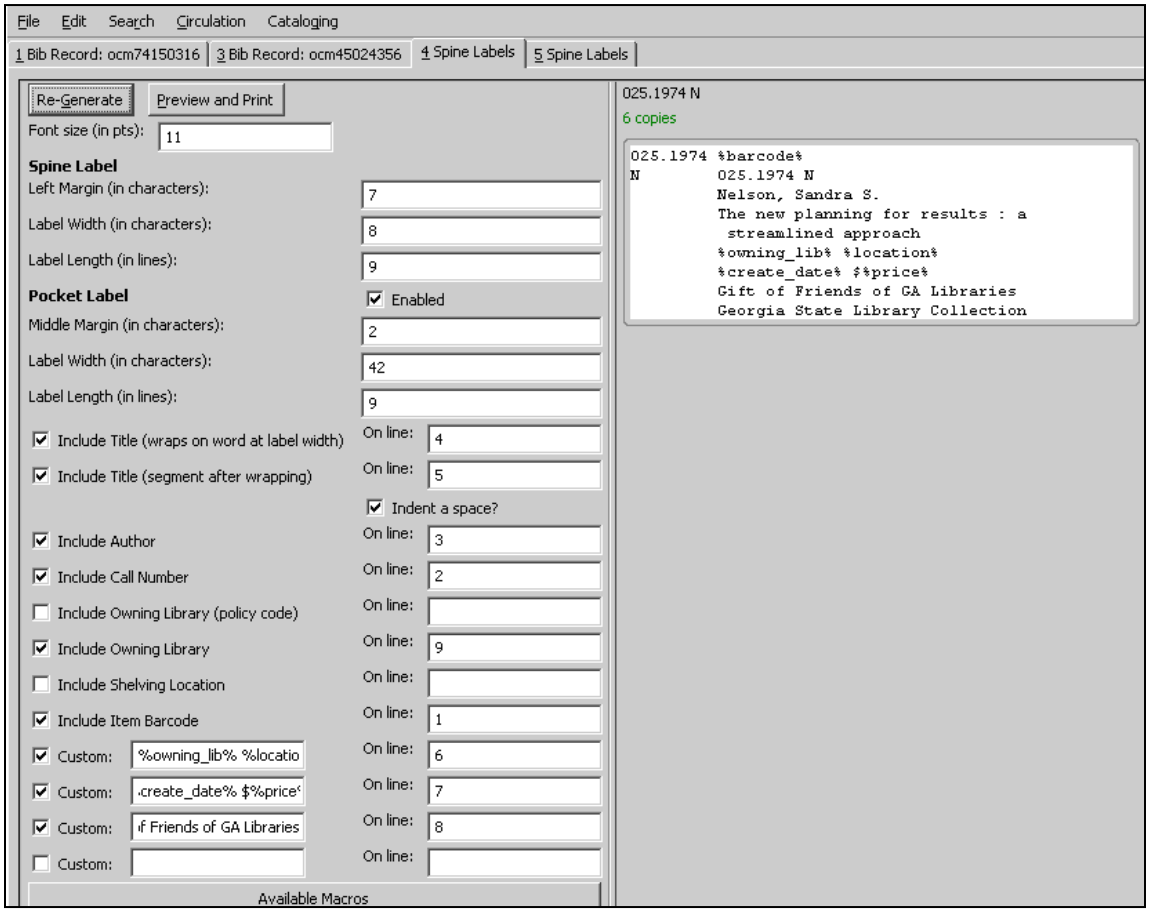
You can edit the label prior to printing as described for printing spine labels.

If you want two macros on the same line you enter them as a custom field as: %owning_lib% %location% or %create_date% %price%, for example. Separate the multiple macros with a space. If you are using macros here for a preprogrammed field, remember to uncheck the field so that it does not repeat on your label.

You can insert specific text before a macro. For example, to insert a dollar sign in front of the price type $ before the price macro: $%price%



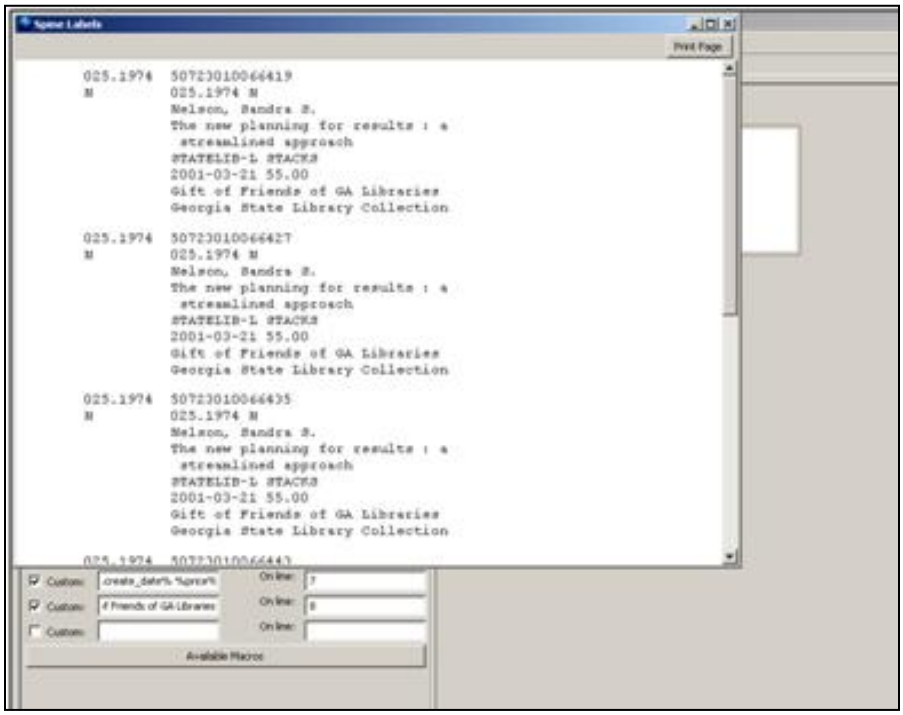
Click **Re-Generate** to view and save changes.



The above configuration results in a spine and pocket label configuration like this:

025.1974 50723010066419
N 025.1974 N
Nelson, Sandra S.
The new planning for results : a
streamlined approach
STATELIB-L STACKS
2001-03-21 $55.00
Gift of Friends of GA Libraries
Georgia State Library Collection

The following spine and pocket labels are created to print barcode, call number, author, title, owning library policy name, and location on one line, creating date and price on one line, a local message, and the actual name of the library.



Clicking on **Preview and Print** displays the labels as they will be printed on the stock. Either print from here, or, if editing is necessary, close the window and make changes. Then **Preview and Print** again.

12.3.3 Printing Pocket Labels

Follow instructions above for Printing Spine Labels.

Chapter 13 Exiting and logging off of Evergreen

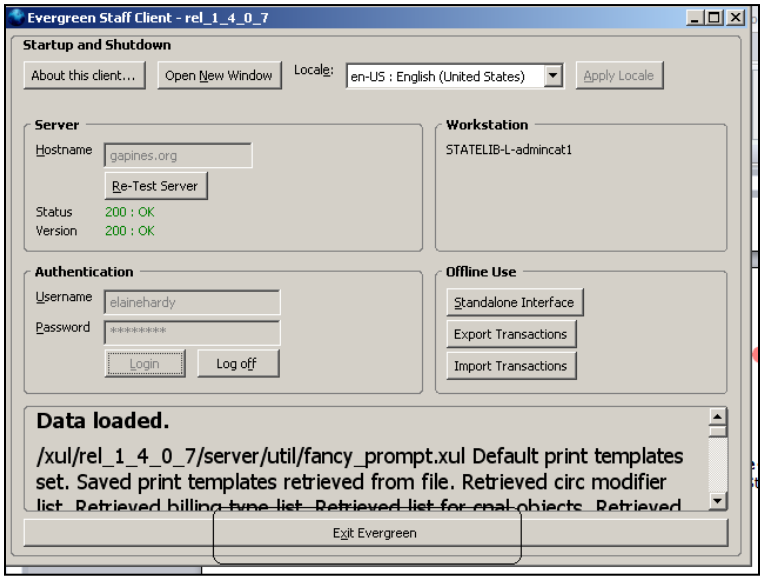
You can either exit completely out of Evergreen, or log off of your session. Logging off of the session keeps the **Startup and Shutdown** window and is helpful if you will be returning to your workstation soon or if you or someone else needs to log in under a different username.

13.1 Exiting Evergreen

There are several ways to exit Evergreen.

From the **File** menu, click on **Quit program** and dialog box to confirm the action will appear and the program will shut down.

From the **Startup and Shutdown** window, click on the **Exit Evergreen** bar:



A dialog box to confirm the action will appear and the program will shut down.

You can also exit the program by clicking on the **X** in the upper right hand portion of your screen. A dialog box to confirm the action will appear and the program will shut down.

Note: If you have opened more than one session of Evergreen at the same time, exiting from one will exit from all opened sessions.

13.2 Logging off of Evergreen

If you do not want to completely exit the program, you can log off from the **Startup and Shutdown** window.

If you have opened a separate window during your staff client session, closing it using the **X** in the upper right hand portion of your screen can sometimes close all windows except the **Startup and Shutdown** window. To return to the program, you must **Log Off** and then **Login** again. You can retrieve the last record you were working on from the **Cataloging** menu: **Retrieve last record (SHIFT F8)**