ELECTRONIC RESOURCES & SERIALS ACCESS DEPT.

Serials Cataloging Unit

Aleph 16 Training

Holdings and Items in Cataloging and Acquisitions/Serials applications in Aleph 16

prepared by Anastasia Guimaraes

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1. Functional and Overview Tree

These two functionalities are available in ***Items*** and ***Search*** tabs of ***Cataloging*** application and in all tabs of ***Acquisitions/Serials*** application.

Functional allows you to make changes to records. For example, in Items tab of the Cataloging application, you have to be in **Functional** if you want to make changes to an existing item record, create/duplicate an item record, have access to Item History, Circulation Summary, and Trigger List.

Overview Tree shows the records in the system that are related to a cataloging record. For example, it displays the holdings records, the administrative record, and the items, subscriptions, orders and loans attached to the selected cataloging record. It is similar to current Navigation Window in v.14.2.
Being in **Overview** Tree allows you to "push" your records to other applications.

Important: System number, as tech services refer to it = BIB, *not* ADM number. Both numbers are located on top of the record's window in ***Cataloging*** application under *Items* tab, and in ***Acquisitions/Serials*** application under *Order*, and *Serials* tabs. The BIB and ADM numbers do not always match, so it is very important to make a distinction between the two.

Libraries within Aleph:
NDU01 = Bibliographic
NDU10 = Authority
NDU50 = Administrative
NDU60 = Holdings
NDU30 = Reserves

2. Item Records Overview

You can control what options you want to display in **Items List** located in the upper pane of the ***Items*** tab of the ***Cataloging*** and ***Serials*** tab of the ***Acquisitions/Serials*** applications. Place your mouse anywhere on the Header line in **Items List** and give a right-click. A menu of choices will pop up. Check the boxes next to the options you want to display and then click on OK.

I recommend that the following options are selected for technical services staff who participate in cataloging activities:
Barcode
Sublibrary
Description
Call number
Collection
Status
Loans
Hol no.
Notes

TIPS:

a) The width of each column in **Items List** is adjustable and could be altered as needed. The system "memorizes" the settings, and they remain fixed until you make further changes. All the changes are computer-specific, not system-specific.

b) It is very difficult to see the links between items and holdings unless you have **Hol no.** selected as one of the options. Holdings (NDU60) system number will be displayed in **Hol no.** column.

c) Notes column will have a **red check mark** in it if there is a note in either **Circ. Note, Internal Note,** or **OPAC Note** fields of the item form.

d) DO NOT use **OPAC Note** as an internal note field because it will display in the Web OPAC. The two non-public note fields are **Circ. Note**, which displays in ***Circulation*** application, and **Internal Note**, which displays in ***Cataloging*** and ***Acquisitions/Serials*** applications.
I recommend that after a new internal note is added to a record, you view the record in the Web OPAC to make sure it does not display to the public.

e) If the item is checked out, you will see a number of loans with an asterisk under **Loans** column in the **Items List**.

f) Instead of selecting **Sublibrary** and **Collection** options on **Items List**, you may want to select **Sublibrary Code** and **Coll. Code** instead. These codes are more precise and require less column space.

g) If you clicked on **New** or **Duplicate** button to create a new item record, but decided you want to exit the form without saving changes, click on **Cancel** button in the lower pane to get out of the item record and return to the **Items List**.

h) Likewise, if you started to make changes to an existing item record, but were not sure if you wanted to save changes to the record, click on **Cancel** button to start over.

i) Spaces preceding the first character in the description field of an item form display in v.16.2 Web OPAC.

CLUE: **Update** button will become bold as soon as you make any changes to an item form. If the **Update** and **Cancel** buttons are grayed out that means you did not make any changes to the item form.

10. Holdings Links

Holdings Link information is located in **HOL Links tab** (sixth tab in the ***Items*** tab within ***Cataloging*** application) on the lower pane. Highlight the item record in the **Items List** of the upper pane and go to the **HOL Links** tab.

Linked items will have a red checkmark in the column **Linked** next to the holdings record system number that they are linked to.
Unlinked item records will NOT have a red checkmark in the **Linked** column.

IMPORTANT: Whenever an item record is unlinked from its holdings record and you highlight it in the upper pane of the **Items List**, the system chooses the first holdings record in the list of holdings records in the lower pane. Please pay attention to the presence of the red checkmark! If it is not present, then the item is unlinked.
Another clue that will help you realize that an item record is unlinked from its holdings is a blank in **Hol. no.** column in the upper pane of the **Items List**.

Linking and unlinking item record from holdings is similar to the process we have in v.14.2. Select an item record you want to link/unlink by highlighting it in the upper pane of the **Items List**. Click **unlink** if you need to relink it to another holdings record, then highlight the correct holdings record from the list in the lower pane and click **link.** Verify that the red checkmark appears.

If the item record is unlinked and you need to link it to a holdings record, highlight the item record first, then highlight the correct holdings record from the list in the lower pane and click **link**. Verify that the red checkmark appears.

11. Viewing Item History

Item history is available in ***Items*** tab within ***Cataloging*** application, and in ***Serial*** tab within ***Acquisitions/Serials*** application. You have to be in **Functional** to access Item History.

In the left pane click on **Items List.** You should see all the items display in the upper right pane. From the list, highlight the item record you want to view history for. Next, in the left pane click on **History** located under **Item** (barcode of the item you highlighted here). If the right pane is blank, make sure to select the third tab ***Item Changes*** located on top of the right pane. A list of all changes to the item will appear. Highlight the line you are interested in examining and click on **View** button.
It appears that in v.16.2 we lost the ability to view the pre- and post-change version of an item record on the same screen.
NOTE: If you click on **All Items History** located under **Items List**, you will access history of every item record associated with that bib. record. Because Item History functionality uses **Sequence** number of an item record, it is possible to choose the information pertaining to a specific item record. To find out the **Sequence** number of item records, you need to have this option selected on the header line of **Items List**.

12. Miscellaneous Helpful Tips:

a) In ***Records*** tab within ***Cataloging*** application an **asterisk** will appear in front of the system number of the record you edited. As soon as you save the changes to the record to the server, the asterisk will disappear.

b) In ***Records*** tab within ***Cataloging*** application the records navigation tree appears in the lower left pane. If you click on the plus (+) sign next to HOL, barcodes of item records <u>linked</u> to that particular holdings will display.

   When you click on a plus (+) sign next to NDU50, the word ITEMS will display.
   If there is a plus (+) sign next to ITEMS and you click on it, barcodes of <u>unlinked</u> item records will display.
   The absence of a plus (+) sign next to the word ITEMS indicates that all the item records are linked to holdings.

   IMPORTANT: Unlinked items may lead to misleading location display in the Web OPAC. For example, if you have only one copy of a title in MATH GEN and the item record is unlinked from the holdings record, the Web OPAC might display two locations for MATH GEN, when in fact there is only one. Linking the item record to the appropriate holdings record will solve the problem.

c) When you use a Web Browser (Ctrl + O) functionality in ***Cataloging*** application to view the record in the Web OPAC, you can move back and forth from one screen to another within the Web OPAC by giving a right click in any blank space and selecting on the menu the first option **Back** or the second option **Forward.**

d) Temporary location change for an item record could be done directly in an item form. **IMPORTANT:** Removing the red check mark from **Temporary Location** box in the item form will only restore Sublibrary and Collection information. For example, if you changed the item status information from 01 to 97, removing the check mark will not revert 97 back to 01. Please continue to use the functionality available through Circulation to do complex temporary location changes and changes to batches of books.

5. Moving Items from One Bibliographic Record to Another

Just like v.14.2, new v.16.2 allows you to move item records from one bib. record to another bib. record with the help of their records' Nav. Map trees. Such process could be useful when item records were created on the wrong bib. record and now need to be deleted from it and created on the correct bib. record. To complete this process in v.16.2 you need to be in the ***Cataloging*** application.

Make sure you have both bibliographic system numbers listed in the upper left pane under **Edit Records**. I recommend that you only leave these two records up and close the rest of the records you were working on.

Click on **Split Editor Mode** icon. The first record will move to the left on the upper pane. Give a click in the grayed out area on the right, then choose the second bib. record located under **Edit Records**. The second record will open in the grayed out area.
Next, click on **Overview Tree** icon located to the left of the **Split Editor Mode** icon. You will see two Nav.Map. trees side by side. Click on the plus (+) signs next to HOL to reveal the barcodes of the item records linked to holdings.

In v.16.2 you are not allowed to move any item records that are linked to holdings. Before you attempt to move any items, you need to unlink them from holdings. Go to ***Items*** tab and unlink item records that you want to move to another record.

Return back to the ***Records*** tab. Click on **Overview Tree** icon and expand both trees by clicking on plus (+) signs. Now you should see the barcodes of the item records you just unlinked listed under NDU50 -- ITEMS. You can only move one record at a time.

Put you mouse on the barcode of the first item record you want to move and hold the left mouse key down. Without letting go, move it across to the other Nav. Map. tree and place it on ITEMS line. Let go of the left mouse key. A warning will pop up "**Are you sure you want to move TREE item?"** Say "Yes". You should receive a **Drag and Drop Status** report indicating that the operation was complete successfully. Click "OK" and continue the process with the rest of the item records you want to move.

TIP: If you do not see a "ghost shadow" of the barcode pinned by your mouse when you try to move it to the other record, that means that you failed to "grab" it with your mouse. Simply try again until you can actually see the item being dragged.

After you complete moving the item records from one bib. to the other bib. record, you need to go to the ***Items*** tab and link all the item records to the appropriate holdings records.