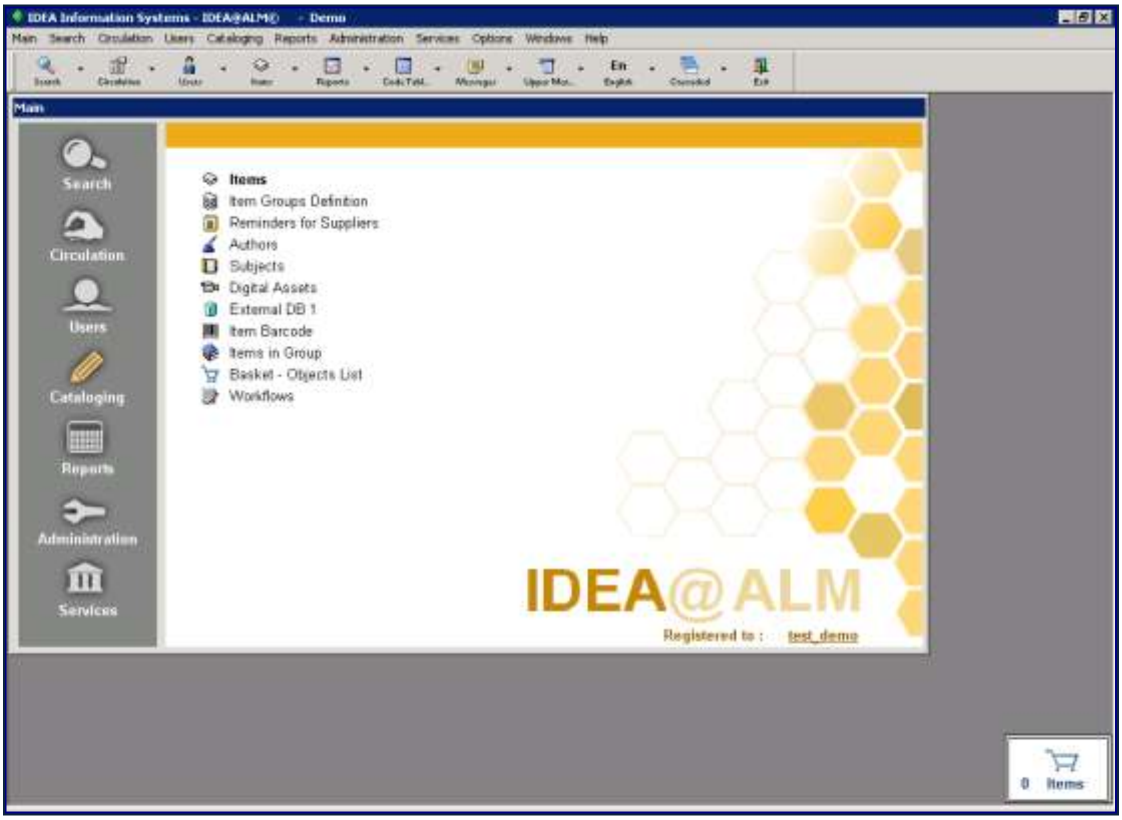
Cataloging

This chapter explains how to work with items. It is organized according to the options in the **Cataloging** section, and the specific lists and tabs used in each option. First, a general overview of the options in the **Cataloging** section is given.

Next, the **Items** option is explained. This includes the **Items** list, which is a list of the items that have been entered in the system, and the item notebook which contains all the information and definitions pertaining to a single item. This section includes instructions on adding a new item; updating an item's details; deleting an item from the system; ascribing an item to a group; and linking digital object files or external links to an item.

Afterwards other **Cataloging** topics are presented: Item Groups, Periodicals and Reminders for Suppliers, Authors, Subjects, Digital Assets, External DB1 and Item Barcode.



Listed below are the operations available in the cataloging module:

Items	Catalog new items and update or delete existing items.
Item Groups Definition	Define and manage groups of items that have a common denominator.
Reminders for Suppliers	Send e-mail and SMS reminders to suppliers regarding missing periodical issues.
Authors	Catalog new authors and update or delete existing authors.
Subjects	Define and manage subjects in a hierarchical thesaurus.
Digital Assets	Define and manage the types of external multimedia files and Internet sites that can be linked to items.

External DB 1	Manage external databases that are used for importing items into the system.
Item Barcode	Prepare barcodes in text or XML files for printing item labels.
Items in Group	Add items to item groups.
Basket - Objects List	Use a list to quickly and easily access objects without running a search.
Workflows	This is an optional module. Catalog, update and delete items according to pre-defined workflows

Note: Some of these options, such as: **Authors**, **Subjects** and **Digital Assets**, are also accessible from the item notebook while cataloging it. The options can be chosen from the **Cataloging** section's menu; from the **Cataloging** option on the menu bar; or from the cataloging icons on the main toolbar.

Items

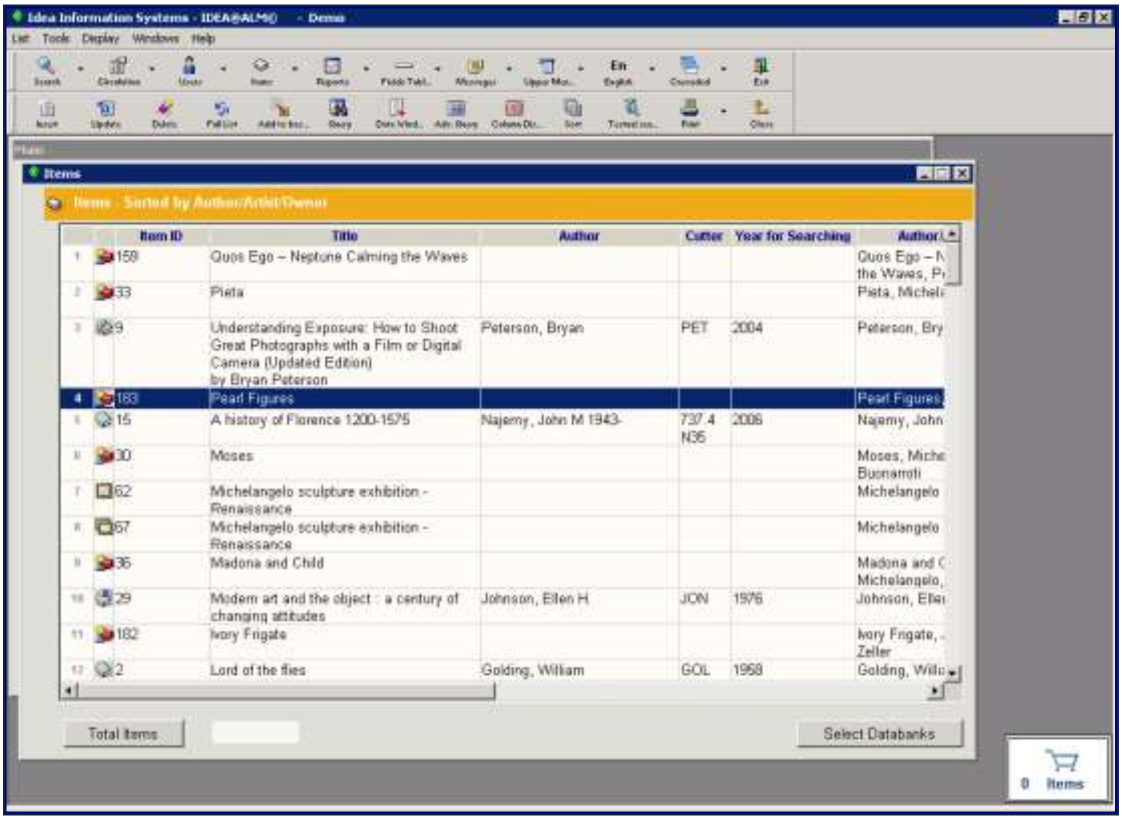
This section presents the **Cataloging** section's **Items** option. Upon selecting the **Items** option, the **Items** list is displayed. The **Items** list includes all the items in the current databank/s. The **Items** list is the starting point for cataloging new items, and updating, deleting, printing and searching for items. All of these operations are explained in the **Items List** section below.

Items are managed using the item notebook. The item notebook includes all the information about the item, and is opened (in the **Items- New** window) each time a new item is cataloged and (in the **Items – Edit** window) when an item is selected from the **Items** list for viewing or updating.

The item notebook is comprised of tabs. The active tab's title is always highlighted. Each of the tabs is presented in detail in the **Item Notebook** section below.

The Items List

Select the **Cataloging** section from the main menu. The list of cataloging operations will be displayed. Select **Items**. The **Items** list will be displayed:



The list displays cataloged items from the default databanks.

See the **Introduction** chapter on working with lists.

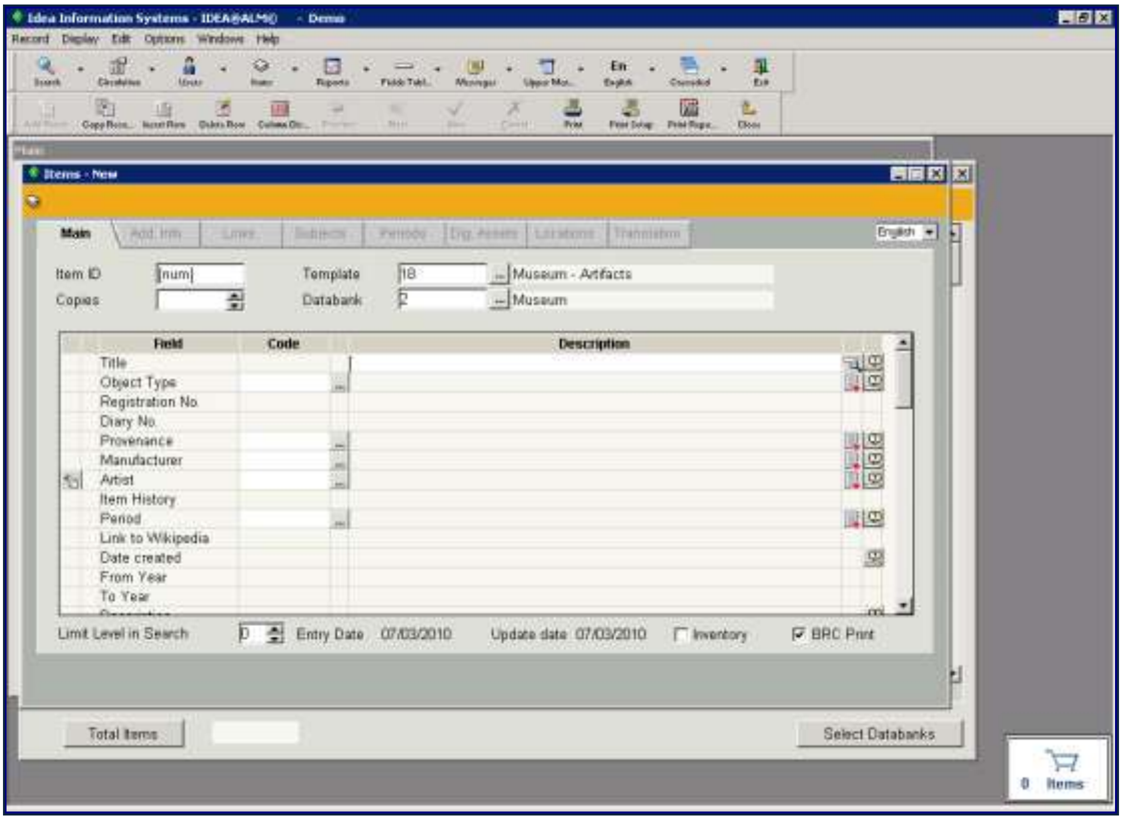
Selecting Databanks
Databanks are chosen by clicking **Select Databanks** and marking the desired databanks. Use the **Mark All** button to select all the databanks.

See the **Administration** chapter for a detailed explanation about setting default databanks for each user.

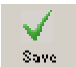
Cataloging a New Item

Select the **Cataloging** section from the main menu. Select the **Items** option from the **Cataloging** menu. The **Items** list will be displayed. Select the **Insert** icon 

from the secondary toolbar. The **Items – New** window will be displayed with an empty item notebook.



When adding a new item, the item notebook opens in the **Main** Tab.

Fill in the new item's details in the **Main** tab and save by selecting the **Save** icon 

from the secondary toolbar or by typing **Ctrl + S**. The **Items- New** window will be renamed to **Items – Edit**, and all the tabs in the item notebook will become active (not grayed out). Each tab is explained in the following sections. Fill in additional item details and save. When finished, close the **Items – Edit** window by selecting the **Close** icon 

from the secondary toolbar or by clicking the X icon  on the upper right corner of the window. The **Items – Edit** window will be closed and the **Items** list window will be displayed, including the new item.

Notes:

1. Fields with red titles are mandatory. They must contain data in order to save the item.
2. Cancel changes that have been made, but not saved, in a tab by selecting the **Cancel** icon 

.
3. Each item template can contain up to ten tabs. See the **Administration** chapter for tab configuration details.

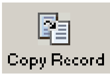
4. New items can also be imported into the system from other databases. See the **External DB1** section below, and the **Exporting and Importing Items in MARC Format** document.
5. After saving the new cataloged item, closing the item notebook and then reopening it, fields without content may or may not be displayed. This is determined by the **Display Empty** checkbox in the template definition's **Search Display** tab. See the **Administration** chapter for more details.

Cataloging by Copying from Item to Item

When the details of a new item are mostly identical to an item that has already been cataloged (such as volumes of an encyclopedia or items in a series) it is most efficient to catalog the new item by copying the existing item, and then change details as needed.

Make sure the **Items** list is the active window. Select the **Insert** icon 

from the secondary toolbar. The **Items- New** window will be displayed with the item notebook.

Select the **Copy Record** icon 

from the secondary toolbar. The **Items** window will be displayed. Select the item to be copied from the list by double clicking or by highlighting it and clicking **Select**. The **Copy Record** window will be displayed, with a prompt to confirm that the new item will have the same template as the copied item. Select **Yes** to use the copied item's template or **No** to use the template defined in the item notebook. The copied item's details will be registered in the item notebook. Make changes as needed and save.

See the **Administration** chapter for details about configuring which fields will be copied when copying records.

Updating an Item

Make sure the **Items** list is the active window. Select the item from the **Items** list by double clicking on the item or by highlighting it and selecting the **Update** icon 

from the secondary toolbar. The item's notebook will be displayed in the **Items – Edit** window, with the **Main** tab as the active tab. Enter the desired changes in any of the tabs and save.

Note: If the item is retrieved by performing a search and then selecting it from the **Search** results list, the item can only be updated by selecting the **Update** icon 

from the secondary toolbar. Double clicking on the item will display the item in the **Search – Presentation** window. This window is for displaying and printing the item only (note that the **Insert Row** and **Delete Row** icons on the secondary toolbar are grayed out).

Deleting Items from the Items List

Deleting One Item

Make sure the **Items** list is the active window. Highlight the item to be deleted. Select the **Delete** icon 

from the secondary toolbar. A prompt will be displayed, verifying that the item should be deleted. Select **Yes**. The item will be removed from the **Items** list.

Deleting a Number of Items
Perform a search to produce the list of items to be deleted (using one of the search queries **Query**, **Advanced Query**, or **Textual Search**). From the main menu bar select **List / Delete All Items in the List**. A prompt will be displayed, verifying that the items should be deleted. Select **Yes**. The items will be deleted.

Notes:
1. After confirming deletion there is no option to restore the deleted items!
2. Items with one or more copies on loan will not be deleted.

Printing an Item
Details of the item can be printed from the **Item** notebook in one of two ways:

Print

Use this option to print any of the tabs. Select the **Print** icon 

from the secondary toolbar. A window for selecting the tabs to be printed will be displayed. Mark the desired tabs and select **OK**. The information from each tab will be printed on a separate page.

Print Report
Use this option to print, or export data to a text file or to an Excel file. The information in the **Main** tab of the item will be printed or exported based on predefined report formats.

Select the **Print Report** icon 

from the secondary toolbar. The **Items List Export** window will be displayed. Fill in the details and select **Execute**. The item information will be printed. See the **Reports** chapter for complete details.

Searching the Items List
From within the **Items** list, select a search option from the secondary toolbar, or from the **Tools** or **Display** drop down menus on the menu bar. The options are **Query** 

, **Textual Search** 

and **Advanced Query** 

. These are similar to the **Basic**, **Advanced**, and **Extended** search methods, respectively, in the **Search** section. See the **Search** chapter for complete details.

Automatic Cataloging of Microsoft™ Office Documents

It is possible to automatically catalog all the information fields that typically appear in an office document. The process uses a special template that has been defined (and that can be inherited in order to tailor a new template to the user's needs) and a special multimedia type.

Make sure the **Items** list is the active window. Select the **Insert** icon 

from the secondary toolbar. The **Items – New** window will be displayed with an empty item notebook.

Select the **Record** drop down menu from the menu bar. Select **Catalog Document**. The **Select Office Document** window will be displayed. Enter the file name and select **Open**. The office document details will be registered in the item notebook. Update additional data as needed and save.

The automatic cataloging process also enters the document's properties in the appropriate fields and creates a link in the **Dig. Assets** tab. The linked file is copied to the location defined in the digital object type.

Note: Additional information on the status of the item (the number of loaned copies, a borrowers list, late returns, loan history, waiting list) may be viewed by selecting the **Display Item** icon from the secondary toolbar.

The Item Notebook

Main Tab

When cataloging a new item, the item notebook opens in the **Main** tab. The tab is comprised of three sections: Upper framework fields, lower framework fields and information fields (that vary according to the item template). The framework fields may include pre-defined defaults that were set in the item template.

Fill in the new item's fields and save. Note that an item can only be saved after all the mandatory fields have been filled. Mandatory fields are displayed in red, and are determined by the template configuration.

Important Note: Every item has a unique ID number. It is recommended to use automatic numbering that is allocated by the system. To do so, leave the value *[num]* that appears in the **Item ID** field in the **Main** tab. After saving the item the number will be allocated by the system. It will be the next running number (or another number that has been previously configured).

Upper Framework Fields

Item ID	A unique item ID number. The field's default value is *[num]*. This value is used to automatically allocate an item ID number by the system. It is recommended to use this allocation method by leaving this value intact. The number will be allocated upon saving the item. To ascribe a number manually, highlight the value *[num]* and type or scan the desired number.
Template	The item's template. Select the **List** button and select a template from the list (see the **Templates** section of the **Administration** chapter for information about templates).
Copies	The number of copies. Type the number or determine it with the half scroll button.
Loan	The loan period, defined as a number of units (such as hours, days, weeks). Type the number of units or determine it with the half scroll button and select the type of unit from the drop down menu.
Databank	The databank is defined in the template's default. Define a different databank by selecting the button and selecting a databank from the list.

Lower Framework Fields

Limit Level in Search	Defines the level of access to the item, according to passwords. Enter a permission level between 0 and 10 by typing it or determining it with the half scroll button.
Cataloging	The date the item was first cataloged. This field is automatically determined by the system and cannot be changed manually.
Update Date	The date the item was updated. This field is automatically updated every time the item is updated and cannot be changed manually.
Include in Inventory	When this checkbox is marked, the item will be included in the inventory and will appear in inventory reports. Unmark the checkbox when cataloging a virtual item.
BRC Print	When this box is checked the item will be included in queries and when printing barcode labels.

Information Fields
Different types of items have different information fields. The information fields are defined in the template. When cataloging an item, information is entered in each field according to the field's type (for example, typing free text, choosing from a table or automatically calculating a field's value). The following list presents details on the types of fields that can be defined.

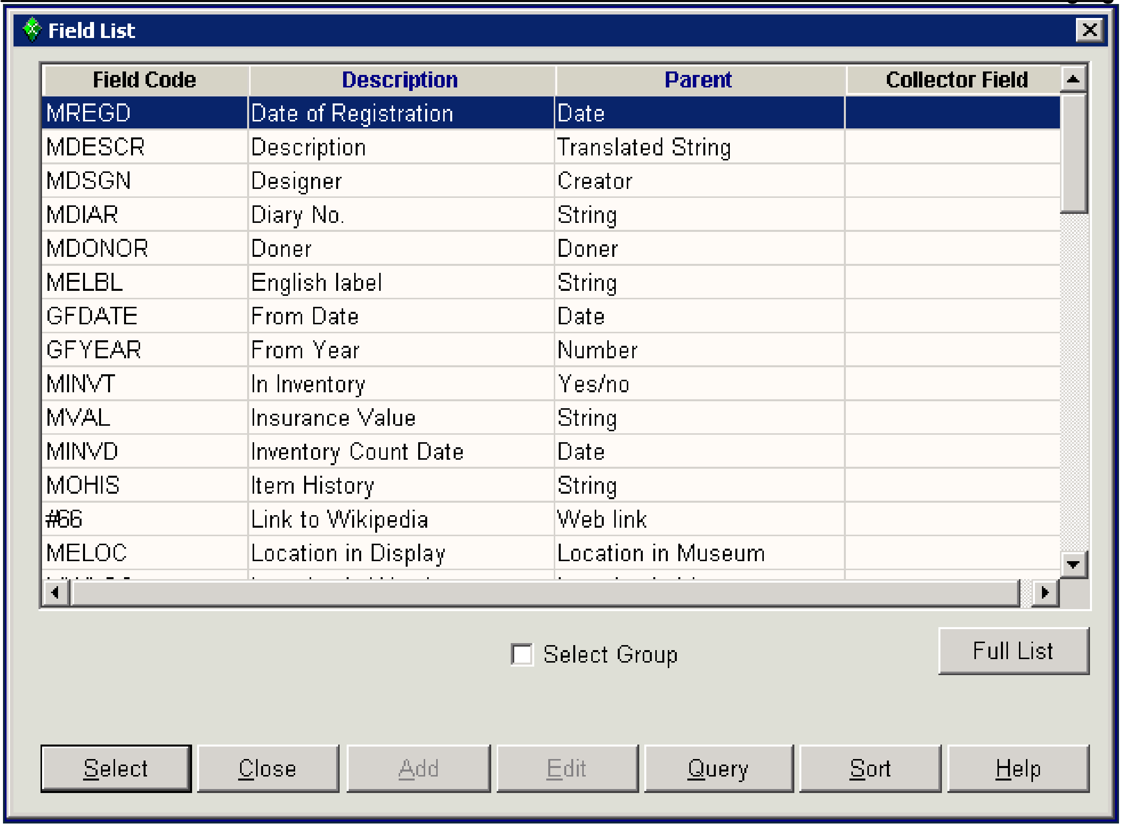
Free Text	Information is typed in manually. There are three types of free text fields: Numeric fields – for digits only String fields (also called Alpha Numeric Fields) - any combination of numbers, symbols and characters in any language. Translated String fields - Alpha Numeric fields translated to various languages
Date	Date format - select from the calendar by clicking the icon, or type in manually.
Field Tables (Code Tables and Unique Tables)	Select values from a table by clicking the icon and selecting the value from the list. **Note:** Values can be added or edited while cataloging. To add a new value select **Insert** and type the new value. T Changing Language- In the unique translated tables it is possible to determine the language by selecting it from the language drop down menu on the bottom left of the screen. When selecting **Update** or **Insert**, the item will appear in the selected language. T When inserting a value in the translated table, it is possible to type in the value in both languages.
Calculated Fields	Free text fields that are calculated by the system. Leave the [Calculated] value that appears in the field as a default.

Item Links Fields	Fields that connect between items. It is possible to connect items while cataloging. To select a connected item click the ... ... icon and choose the desired item by typing its number or its title, and selecting **OK**.
Time	Used for writing the time in the format HH:MM:SS. Limited to 23:59:59. Note that typing in a partial format such as 10 will be translated into *10:00:00* (that is 10 hours, and not ten seconds). *1:30* will be translated as *01:30:00*, and *1.5* will be translated as *01:05:00*.
Display in the Internet and the Intranet	A **Yes/ No** field that determines whether the item will be displayed in the Web interface and intranet.
Collecting Fields	A collection of fields including a main (collector) field. A collection of fields is represented hierarchically: the collected fields appear indented under the collector field. The display can be collapsed or expanded by clicking "-"or "+" respectively. Information is cataloged in the collected fields. The collector field serves only for display.
Inherited/ Derived Fields	Fields that receive their information from other fields. Field inheritance is performed using collected fields. The collector field is the link field that points to the item from which the information is inherited. Each of the collected fields inherits the data from a field with the same data type. Link method: Select the table ... button and search for the desired item by typing the item number or title. After finding the item click **OK**. The derived fields will acquire the data from the linked item. It is possible to change the value in the inherited field in accordance with the system configurations (there is an option to configure inheritance fields that may not be modified). If the field's value is different in the item notebook, the inheritance will be highlighted in the same field and in the same item for all the instances of that field. It is possible to restore the inheritance fields where the inheritance has been cancelled by right clicking the field and selecting the value from a menu.
Search Databank Field	A field in which a linkage between the item and a secondary databank (different from the main databank) can be defined for search and authorization purposes.

Adding a Field to the Main Tab

Additional fields can be added to the **Main** tab. These fields may be duplicates of existing fields, or new fields that are added from the **Field List**.

Make sure the **Main** tab is the active tab. Select the **Insert Row** icon Insert Row from the secondary toolbar. The **Field List** will be displayed.



Select a field by double clicking on it or by highlighting it and clicking **Select**. The field will be inserted. When selecting a collector field, all its collected fields are added below it.

Deleting a Field from an Item's Notebook

Select the field that is to be deleted. Select the **Delete Row** icon 

on the toolbar. The field will be deleted.

Notes:

1. A field that was defined in the item's template can only be removed by changing the template. It cannot be deleted from the notebook. See the **Templates** section of the **Administration** chapter for more details.
2. The deletion of a collector field is possible if there is no data in the collected fields and if the collector field's **Display Empty** checkbox has not been marked in the template's **Search Display** tab. See the **Administration** chapter for more details.

T Changing the Language

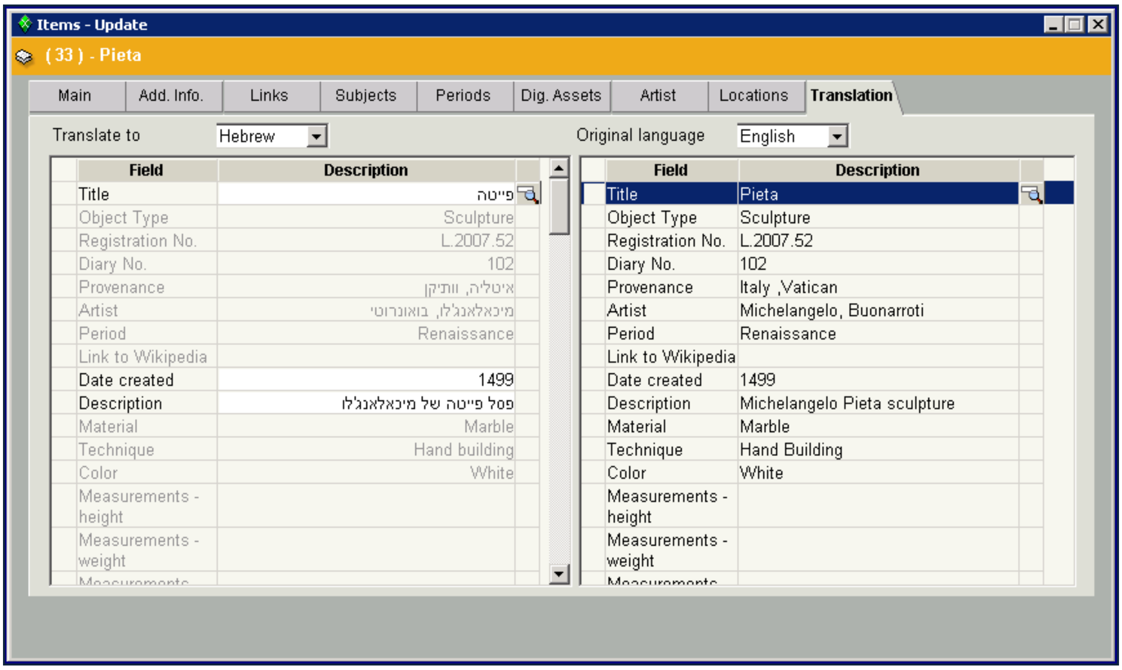
When logging into a translatable item the **Change Language** drop down menu will appear in the notebook on the upper right. It will appear only in translatable items and in relevant tabs.

When changing the language, the translatable free text fields will be displayed in the new language. Free text fields that are not translatable will not change. In fields that have been defined by the user as unique tables and in linked items, the values are displayed in the new language.

When a change is executed in the item notebook and the **Save**  and **Cancel**  icons are active, the **Change Language** button changes to grey (not active) until the changes are saved.

Translation Tab

The **Translation** tab is only available in multilingual systems. The tab is divided into two sections, and a specific language can be defined for each section.



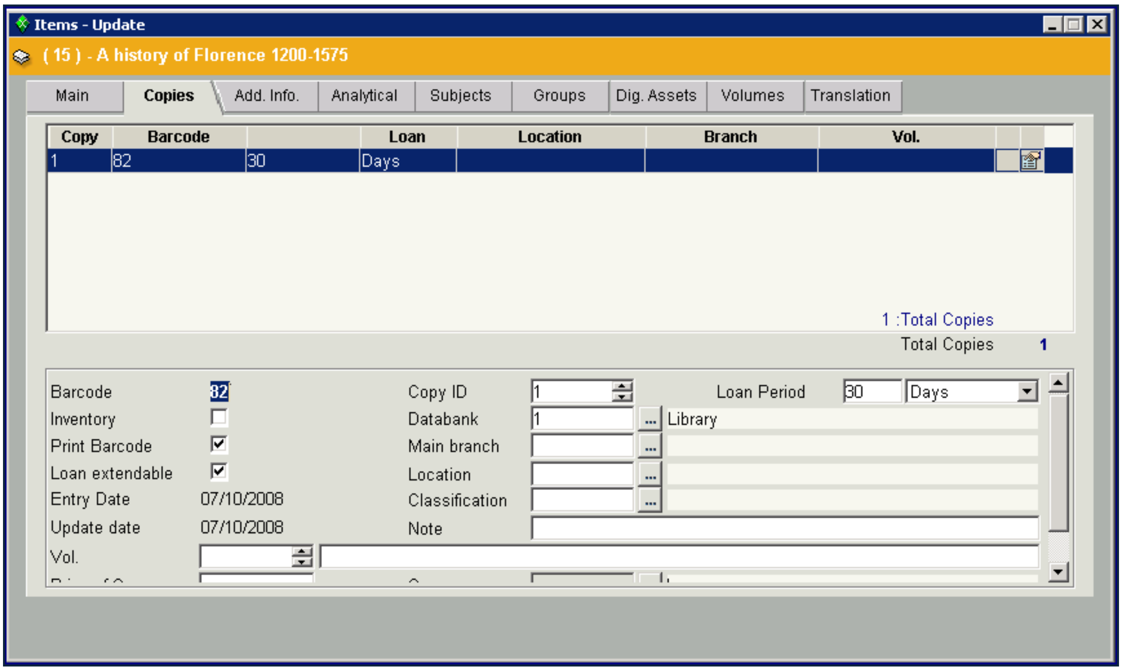
The **Original Language** section is only for display, and the **Translate to** section is used to type the translation.

Text fields that were inherited from the title or from the translated string can be edited. Only lines of the type **Reference** can be inserted and deleted.

Log Changes Tab

This tab is only available in systems that include the **Log** module. It displays all the changes that have been made to the item. For every change the following fields are displayed: **Station Name** (identifies the Web user), **Date** and **Hour**, **Change Type**: **Insertion/ Deletion/ Update**, the field's old value and new value, and **Lif Code** (if relevant).

Copies Tab



Each copy of an item is identified by the item ID, the copy number and the copy's barcode number (see the **Barcode** section below). The upper part of the **Copy** tab displays the copies' distribution according to the number of copies entered in the **Main** tab. The lower part of the screen contains specific details for the highlighted copy. Use the scroll bar to move up and down.

Updating a Copy

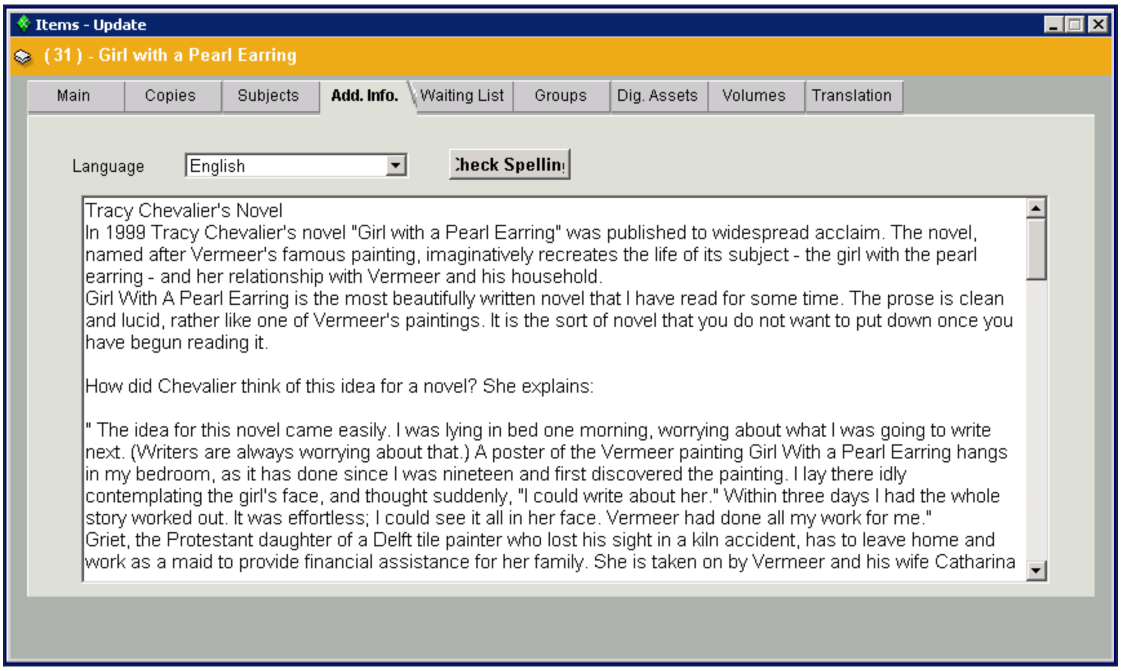
Update details of a specific copy by clicking on the copy in the upper part of the screen, and updating and then saving the details in the lower part.

Deleting Copies

The **Copies** tab is also used to delete copies. It is possible to select one copy, or a number of copies for deletion by using the **Ctrl + Shift** keys. After highlighting the copies for deletion select the **Delete Row** icon 

from the secondary toolbar. A dialogue box will appear, with a prompt to delete the copies. Select **Yes** to delete.

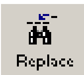
Additional Information Tab



This tab is used to enter additional free text information connected to the item, which is not included in the fields and tabs. This information can then be retrieved using a free-text based search.

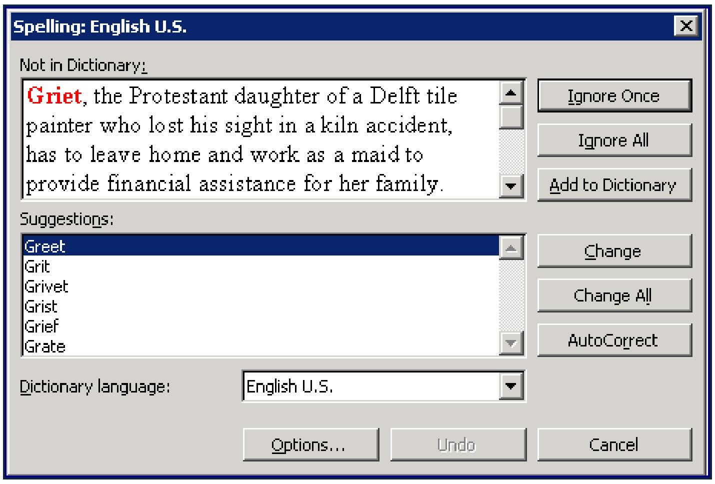
The **Additional Information** tab may support a number of languages. Select the desired language from the list in the **Language** field. Type in the text and save it. Once the information is saved, it is possible to select an additional language and type in text.

Search for text in the tab, by using the **Search** icon 

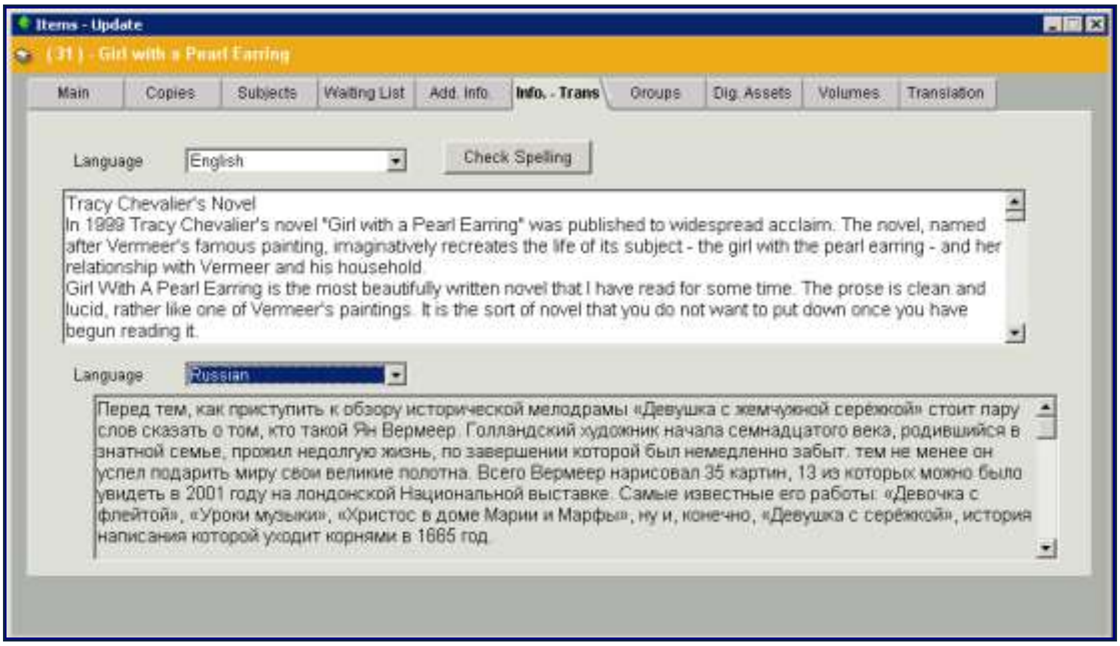
and the **Replace** icon 

from the secondary toolbar.

Check spelling by selecting the **Check Spelling** button. A speller window will open:

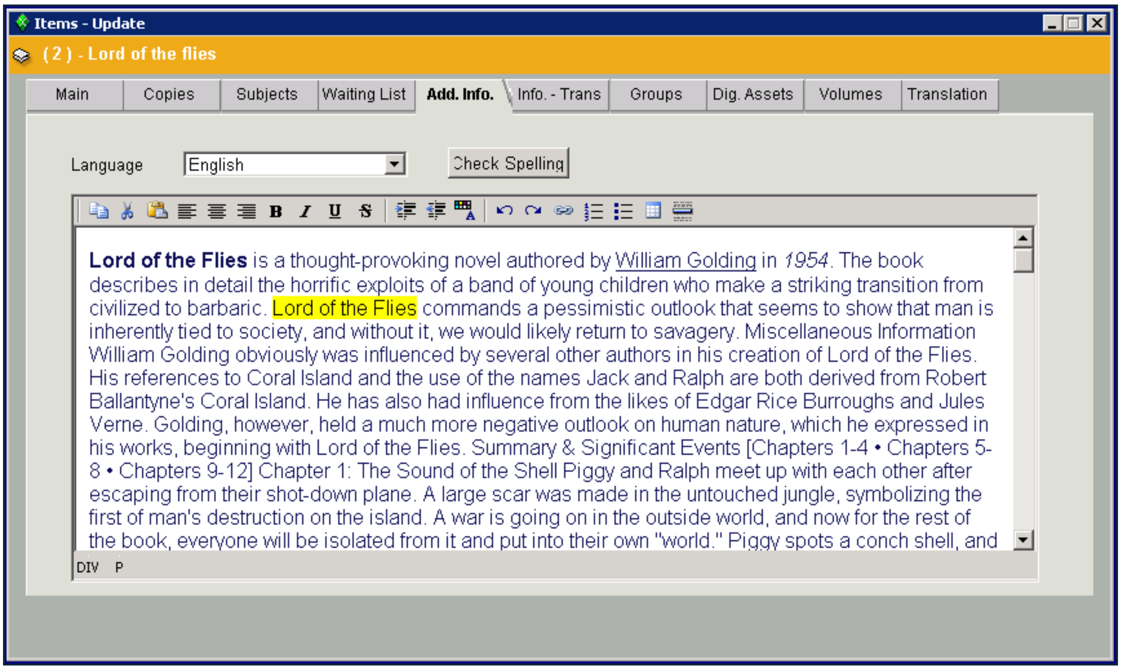


The **Additional Information** tab can be configured as a split tab, in order to display two languages simultaneously for translation:



or as an HTML editor using standard Microsoft ™ Office tools, such as bolding, font size, colors and hypertext.

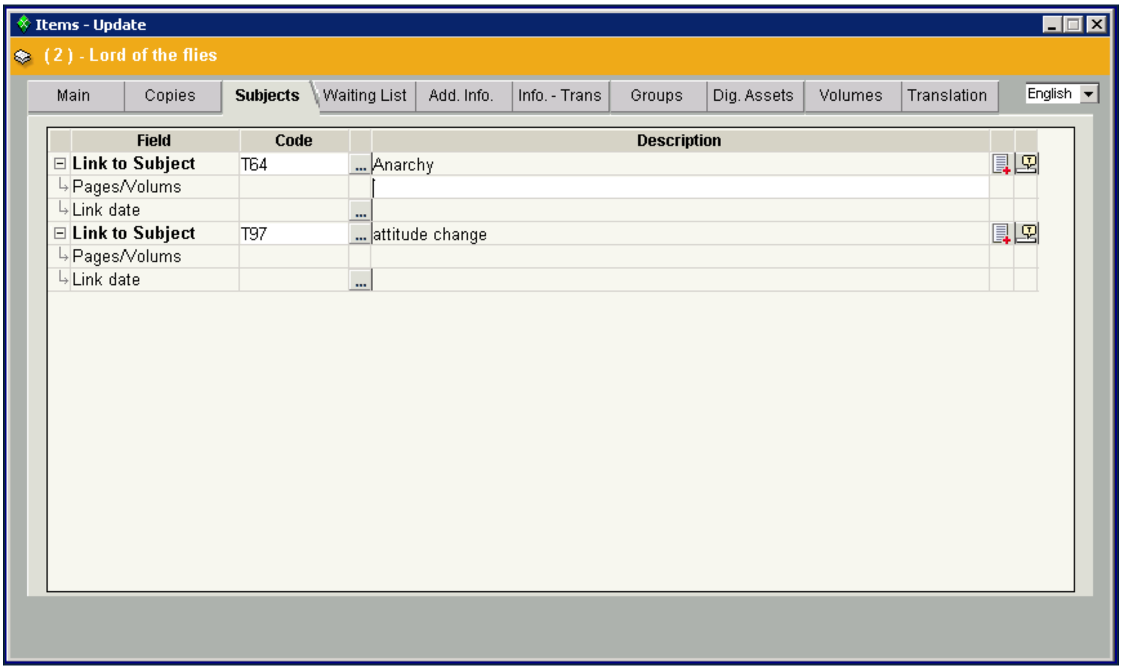
Note: The text is displayed as formatted in the Web interface and not in the Windows interface.



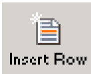
This is defined in **Administration / Templates / <Template Name> /Tabs tab**. Select **Add. Info Tab** for a regular tab, **Add Info.-Translation** tab for a split tab, **Add Info.- HTML** for a tab with an HTML editor, or **Add Info.-Translation – HTML** for a split tab with an HTML text editor.

Subjects Tab

The **Subjects** tab is used to link related subjects to the item.



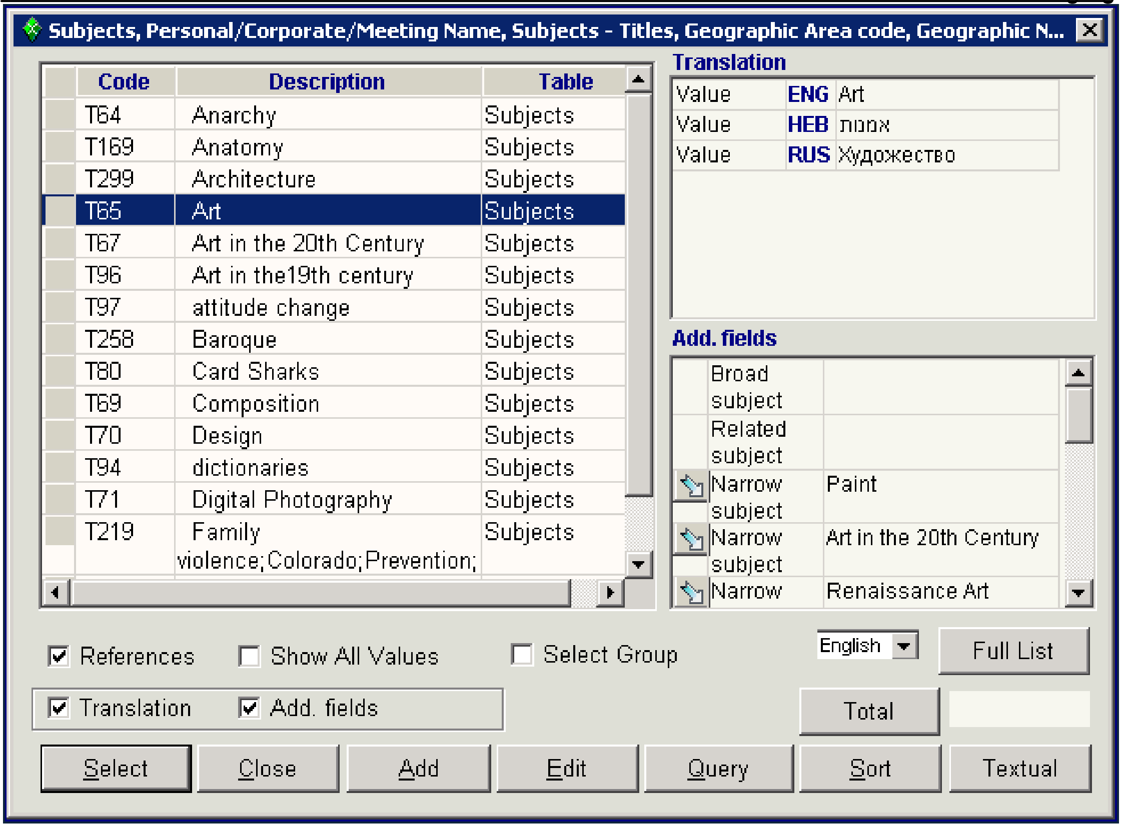
Linking Subjects to an Item

Subjects are linked to an item, by adding them to the list in the **Subjects** tab. From within the **Subjects** tab, select the **Insert Row** icon 

from the secondary toolbar. The **Field List** will be displayed. This list includes collector fields and the collected fields that can be linked to them. In the example above, the **Link to Subject** field is the collector field which defines the subject, and the collected fields that are linked to the subject are **Pages / Volumes** and **Link Date**.

In order to link an additional subject to the item, select the appropriate field from the **Field List**. A new empty subject collector field will be added to the **Subjects** tab together with its defined collected fields.

Select the button to the right of the collector field (in the example above the **Link to Subject** field). The **Subjects** window will be displayed, showing the list of available subject links.



Double click on a subject, or highlight it and click **Select.** The subject's code and description will be inserted as the collector field's values.

In order to add a number of subjects to the subjects list, mark the **Select Group** checkbox in the **Subjects** window. An additional list will be opened on the lower right part of the screen. Double click a subject, or highlight it and select the down arrow or drag it to the lower right part of the screen. The subject will appear in both windows. Repeat for all the subjects that are to be added to the **Subjects** tab and click **Select**. The subjects will be added to the **Subjects** tab, including both the collector fields and the collected fields.

Once a subject has been added to the **Subjects** tab, values can be entered in the collected fields. The numbers of the pages where the subject appears can be typed in the **Pages / Volumes** field. For periodicals, the issue can be typed in this field or chosen from a list. The link date can be entered by clicking the ... icon to the right of the **Link Date** field and choosing a date from the calendar. Additional collected fields can be added to a specific subject in the **Subjects** tab. Place the cursor on the subject's **Code** field and select the **Insert Row** icon Insert Row from the secondary toolbar. The **Field List** will be displayed. Highlight the desired collected field and click **Select**. The collected field will be added. Save the subject

Subjects Window Options

The **Subjects** window displays the list of subjects and additional information, depending on the settings of the checkboxes.

References – Mark the checkbox to display references. The references are identified by the sun icon on the left.

Show All Values - Mark the checkbox to display unapproved subjects. Unapproved subjects will appear in red.

Translation – Mark the checkbox to display the translation of the subject name in the languages defined in the system.

Add. Fields – The subject's code, description and table type are displayed in the **Subject** window's main frame. Mark the **Add. Fields** checkbox in order to display the additional fields that are defined in the subject's notebook (such as **Related Subject**, **Narrow Subject** and **Title Variations**).

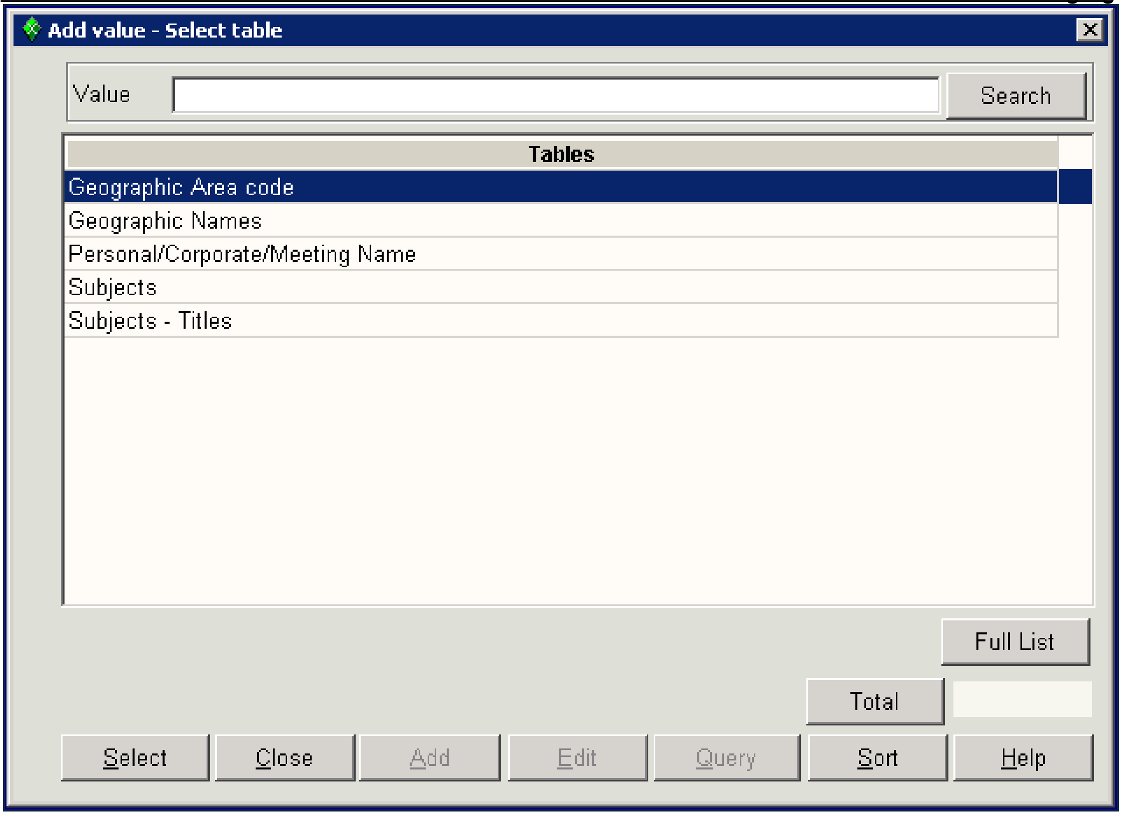
Notes:

1. The subject's notebook can be displayed by selecting the **Display** icon to the right of the **Description** field.
2. The translation of the subject name in the languages defined in the system can be displayed by selecting the **Translation** icon to the right of the **Description** field.

Adding a New Subject to the Subjects List

When a required subject does not appear in the **Subjects** list, insert a new subject by selecting the **Add** button at the bottom of the **Subjects** window. The **Add Value – Select Table** window will be displayed, listing the subject tables that are defined in the system. Each subject table is a list of subjects of a certain type. Select one of the subject tables.

Note: For most installations only one table is relevant – the **Subjects** table. Multiple subject tables are relevant for MARC users and customers that wish to manage a more complex relation and hierarchy of subjects.



After selecting a table, a **Subjects** window will be displayed. Enter the new subject's details and save. The **Subjects** window is the same as the **Main** tab in the subjects notebook.

Editing a Subject from the Subjects List

Select the subject from the **Subjects** list in the **Subjects** window and select **Edit**. The **Subjects – Edit** window will be displayed. This window is the same as the **Main** tab in the subject notebook. Edit the subject's details and save.

Analytical Tab

The **Analytical** tab is used to define and display hierarchal links between items. For example, an article in an issue, or a document within a file. The display is in a tree format.

The tab is divided into two windows. The upper window shows the item's parents and siblings and is for display only. The lower window is used to insert, delete, and display the item's children.

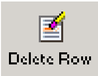
Creating an Analytical Structure

Analytical structures are created by selecting a parent item and defining its children. This process is also called linking.

From within the **Analytical** tab of the parent's notebook, select the **Insert Row** icon 

from the secondary toolbar. The **Items List** will be displayed.

Select the child item from the list. Repeat this action until you have selected all the children.

To delete an item from the list of children, highlight the item and select the **Delete Row** icon 

from the secondary toolbar.

After the children are linked to the parent, the analytical structure is displayed in a different manner for the parent item and the child items. When viewing the parent, the list of children will be displayed in the lower window. When viewing one of the child items, a tree structure will be displayed in the upper window, displaying the item's parents and siblings. The upper window is for display only.

The tree may be displayed in an expanded mode or a collapsed mode. When the tree is collapsed the + sign appears. Clicking on the "+" expands the full tree. When the tree is expanded the - sign appears. Clicking on the "–" collapses the tree.

Groups Tab

The **Groups** tab is used to attach items to a group with a common denominator, in order to enable quick processing of all items as one unit. For example, it is possible to borrow all the items in a group in one action.

Attaching an Item to a Group

From the **Groups** tab select the **Insert Row** icon 

from the secondary toolbar. The **Item Groups** list will be displayed. The list includes the item groups that have already been created. Select an existing group or add a new one and then click **Select**.

Removing an Item from a Group

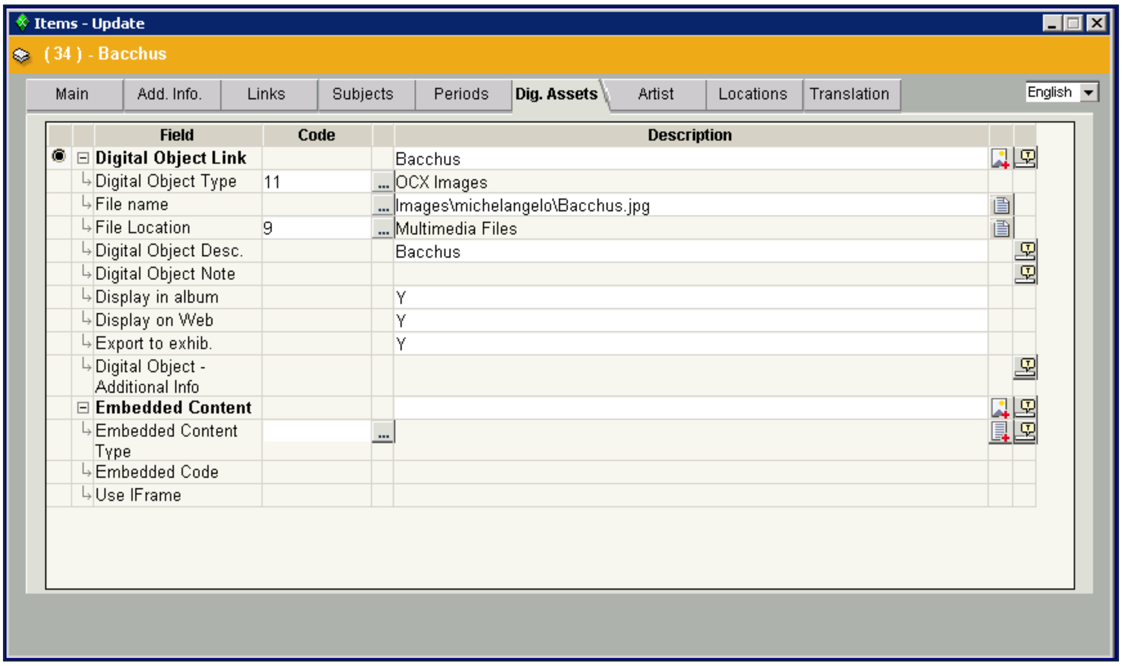
Highlight the group on the **Groups** tab and select the **Delete Row** icon 

from the secondary toolbar. The line will be deleted from the **Group** tab and the item will no longer be attached to the group. The items group itself will not be deleted.

Note: It is also possible to create a new group using the **Item Groups Definition** option in the **Cataloging** section. See the **Item Groups** section for more details about creating item groups.

Dig. Assets Tab

The **Dig. Assets** tab is used to link digital objects or external links to the item. Examples are movies, images, sound files, excel files, PDF files, as well as Internet sites and other external links. After making the link it is possible to activate the digital object file while viewing the item data.



Linking Digital Object Files or External Links to an Item

From the **Dig. Assets** tab, select the **Insert Row** icon Insert Row from the secondary toolbar. The available digital object link fields will be displayed. Select the appropriate link field, which is a collector field. A new collector field will be added to the **Dig. Assets** tab, together with its collected fields. Enter the details in the fields and save.

Each digital object link collector field can have different collected fields under it. The basic digital object link has the following collected fields:

Digital Object Link	The name of the link. Type in the name, or leave as is and the system will determine the name.
Digital Object Type	The type of digital object file or external link that will be linked to the item. Click the table button. The **Digital Objects** table will be displayed. Select the desired digital object type by double clicking on it or by highlighting it and clicking **Select**, or configure a new digital object type by selecting **Add** and filling in the **Digital Object Add** form that is displayed. **Note:** New digital object types can also be configured in two other places: In the **Users** module, from the client notebook's **Dig. Assets** tab, and in the **Cataloging** module by selecting the **Digital Assets** option from the **Cataloging** menu.
File Name	The digital object file or external link that will be linked to the item. For files, click the button. The **Select File** window will be displayed. Locate and then select the desired file by double

	clicking on it or by highlighting it and selecting **Open**. For Internet addresses and other external links, type, or copy and paste, the address into the field. It is possible to open the linked file or Internet site by clicking on the icon on the right.
File Location	The physical location of the file (the computer folder where it is saved). When the field has a value, clicking the icon will display data on the location.
Digital Object Description	Free text. When this field is left empty, the name of the linked file will be listed here.
Digital Object Note	Free text.
Display in Album	Type **Y** for **Yes** in order to display the image in the items' album display.
Display on Web	Type **Y** for **Yes** in order to display the attached digital object image when the item is viewed by the end user on the IDEA@ALM Web interface.
Export to Exhibition	Type **Y** for **Yes** in order to include the image in an exhibition.
Digital Object Additional Info.	Free text which will be displayed as additional information when in exhibition display.
Main Digital Object	When an item has more than one digital object link, mark the radio button next to the multimedia link that will be the main link displayed in the item card.

The fields in the digital object link vary according to the definition of the collected fields.

It is possible to link an unlimited number of different / identical digital objects or external links to an item, by inserting additional digital object link fields in the **Dig. Assets** tab (as described above, for each new digital object link select the **Insert Row** icon Insert Row from the secondary toolbar).

The digital object link field might be different for different types of files. For example, an image file link requires different data fields (that is, collected fields) than a video file link.

Different types of items will use different digital object links. These can be determined in the item template. See the **Administration** chapter's **Templates** section for more details.

Changing the Order of Digital Object Links

Change the order of the digital object links in the **Dig. Assets** tab by selecting the **Move Up** icon Move Up or **Move Down** icon Move Down from the secondary toolbar and then save.

Linking a Number of Digital Object Files Simultaneously

It is possible to simultaneously link a number of digital object files to the item. Select the button next to the **File Name** field. The **Select File** window will be displayed. Locate the desired files, highlight them using the **Ctrl+Shift** keys and select **Open**. The digital object link field will be duplicated according to the number of files selected.

Scanning from IDEA@ALM and Saving the Scanned File

In order to enable efficient linking of scanned documents to an item, it is possible to activate the scanner from IDEA@ALM; execute an automatic linking of the file to the item; and then save the file in the required libraries.

After configuring the digital object type that uses the scanned file (there may be a number of these templates) the file is linked to the item in the following manner:

The available digital object link fields will be displayed. Select the appropriate link field, which is a collector field. A new collector field will be added to the **Dig. Assets** tab, together with its collected fields.

From the **Dig. Assets** tab, select the **Insert Row** icon from the secondary toolbar. The available digital object links will be displayed. Select the appropriate link field, which is a collector field. A new collector field will be added to the **Dig. Assets** tab, together with its collected fields. Select the table button next to the **Digital Object Type** field. The **Digital Object** table will be displayed. Select the digital object type that uses the scanned file by double clicking on it or by highlighting it and clicking **Select**. Select the table button next to the **File Location** field. The **File Location** table will be displayed. Select the scanner location.

Select the **Create File** icon . In the window that is displayed, select the appropriate scanner driver by double clicking on it or by highlighting it and selecting **OK**.

The scanning program will be activated, and then it will be possible to scan the document.

Notes:

1. Configuration of the digital object types that use scanned files is performed in **Cataloging / Digital Assets**.
2. The definition of the logical location of the scanned files is performed in **Administration / Code Tables / File Location Definitions**.

In the section **Cataloging / Digital Assets**, for every digital object type that uses insertion of files by a scanner, the scanner program must be configured.

If the scanner is not connected but a driver has been activated, there might be an option to “simulate” the scanner and receive an image.

When completing the scan the **Save** window will be displayed. The scanned image is displayed in the window’s left section. Select or enter the file name and the library destination. The default file name is `<item number counter>.jpg`. Select **OK**. The file will be saved and linked to the item.

Note: Other programs can also be configured to link files, as long as the program has been defined in the logical locations table. However, automatic creation of an item with linked digital object files is only available for scanned files.

Embedded Content

The **Embedded Content** field is a collector field which is used in the **Dig. Assets** tab to insert embedded content in an item. The field must be included in the item template

Embedded content is digital content that is not stored in the IDEA system but arrives from an outer source, such as a Google map or a YouTube clip, and is displayed in the Web interface. The current available embedded content types are:

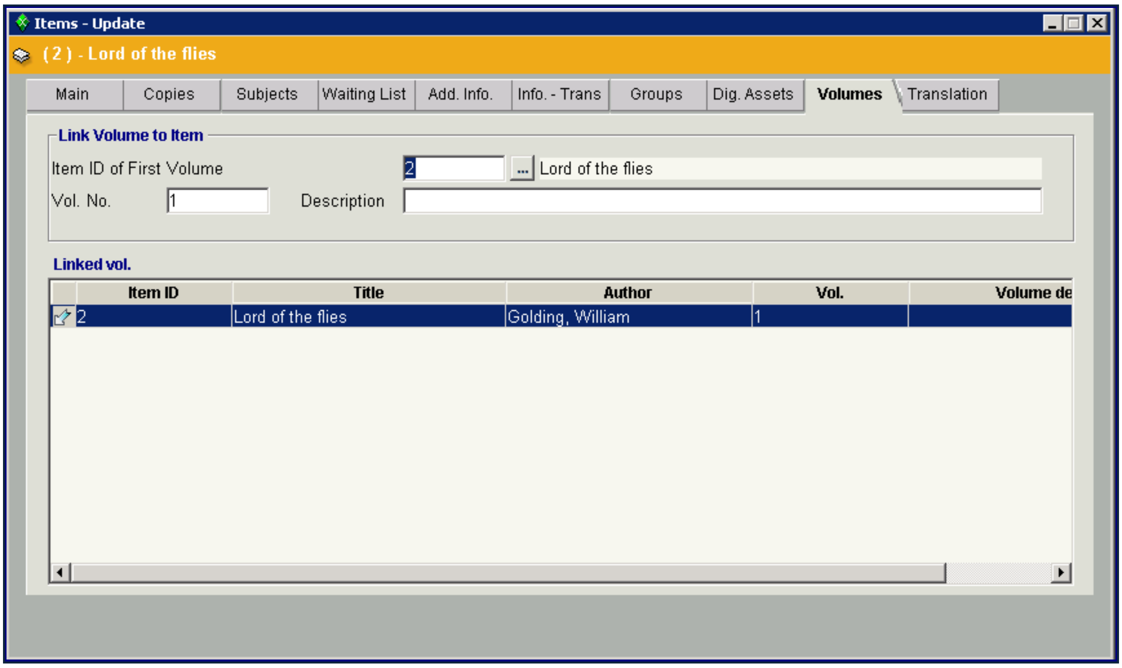
- Flicker Slideshows
- Google Maps
- Google Maps by API
- Google Videos
- YouTube clips

The embedded content link must be the actual link provided by the Web site and not the URL from the address line.

Please consult IDEA support for further details.

Volumes Tab

The **Volumes** tab is used to connect volumes in a series.



Connecting Volumes

Catalog each volume as an independent item. Each volume will receive a unique identification number. Note that if the volume details are for the most part identical, it is worthwhile to create each new item by copying a volume (select the **Copy Record** icon from the secondary toolbar). In the item notebook's **Main** tab, it is possible to note down in the **Volumes** field the number of volumes that have been linked.

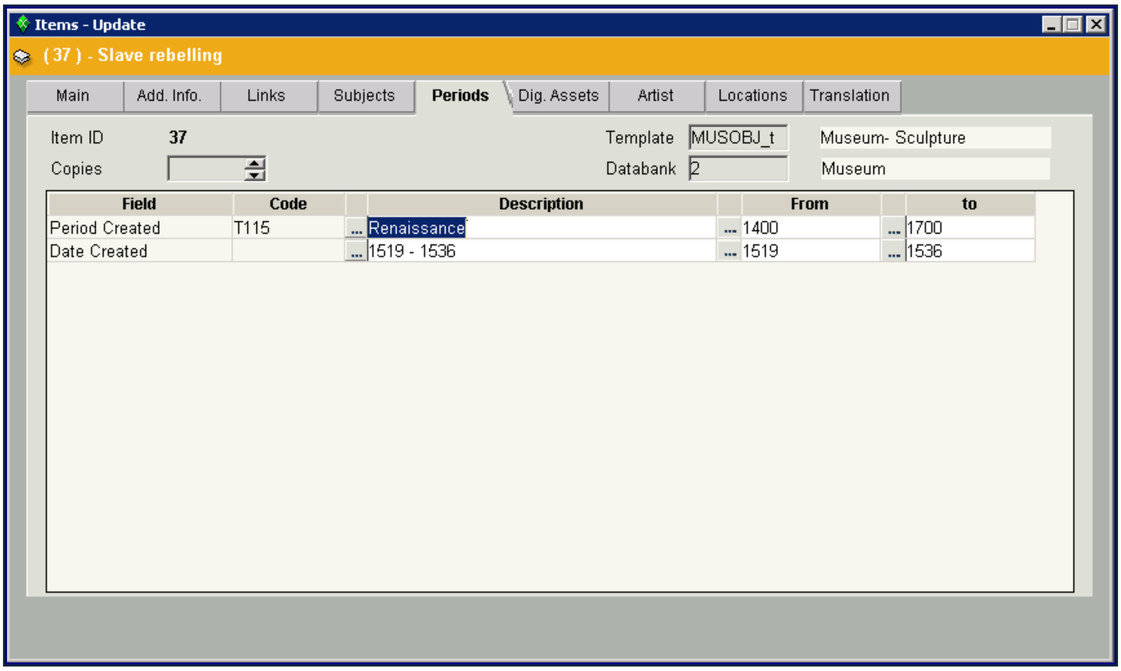
Open the second volume's item notebook from the **Items List** by double clicking on it or by highlighting it and selecting the **Update** icon  from the secondary toolbar. Select the **Volumes** tab. Enter the first volume's item ID number in the **Item ID of First Volume** field by typing it manually or by clicking the  button and selecting the ID number from the list. The number of the current volume in the series will be displayed in the **Volume Number** field.

Additional information may be added as free text in the **Description** field.

Save by selecting the **Save** icon  from the secondary toolbar or by typing **Ctrl+S**.

Repeat this process for the rest of the volumes. Once the volumes have been connected, the list of all the items in the series will be displayed in the **Linked Volumes** list on the bottom part of the screen.

Periods Tab



The **Periods** tab is used to combine a period field with a name and with dates. This is done by creating a relationship table.

The dates are managed in the item's **Periods** tab with the following structure:

Field Name	**Code**	**Description (Period)**		**From**	**To**
			…		

The **Description** field defines the period. This can be done by selecting values from the periods table or by entering free text. Selecting a value from the periods table will automatically display a year range that has been configured for the item. Once the period has been selected, it is possible to manually change the year ranges at the item level.

When the date is one specific year, type the year in the **From** field and it will automatically be copied into the **To** and **Description** fields.

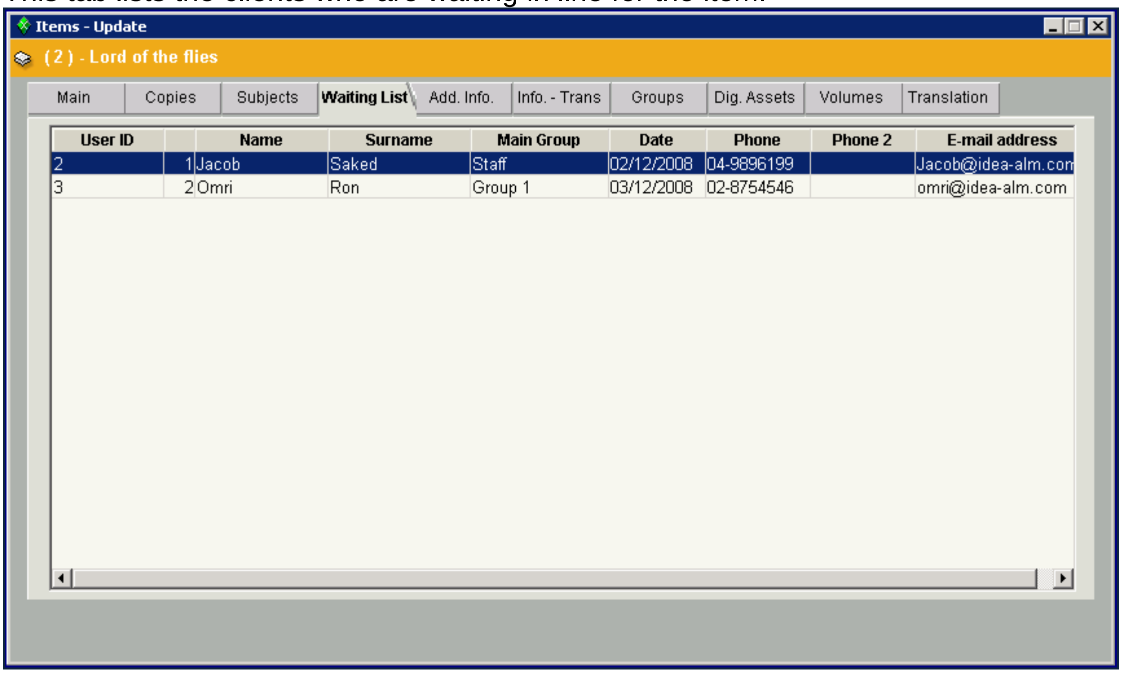
It is possible to enter a range in the **From** and **To** fields, leaving the **Description** field empty. The system will determine the **Description** field automatically.
BCE years are marked with a minus symbol.

Notes:

1. The **Periods** tab is configured the same way as other tabs, in **Administration / Templates / <Template Name> / Periods Tab**. The period type fields are added the same way regular fields are added to other tabs.
2. Period type fields are inherited fields from the **PERIOD** parent field. Period type fields are created like other fields in **Administration / Fields Table**.
3. It is not possible to replicate the period field (3 fields) in the item. It is possible to create extra fields in the fields table, with running numbering.
4. The **Periods** table functions as a recommending table (select a value or enter free text) where it is possible to change the year or period name in the item. If the values table is changed, an update will not be executed in the item.

Waiting List Tab

This tab lists the clients who are waiting in line for the item.



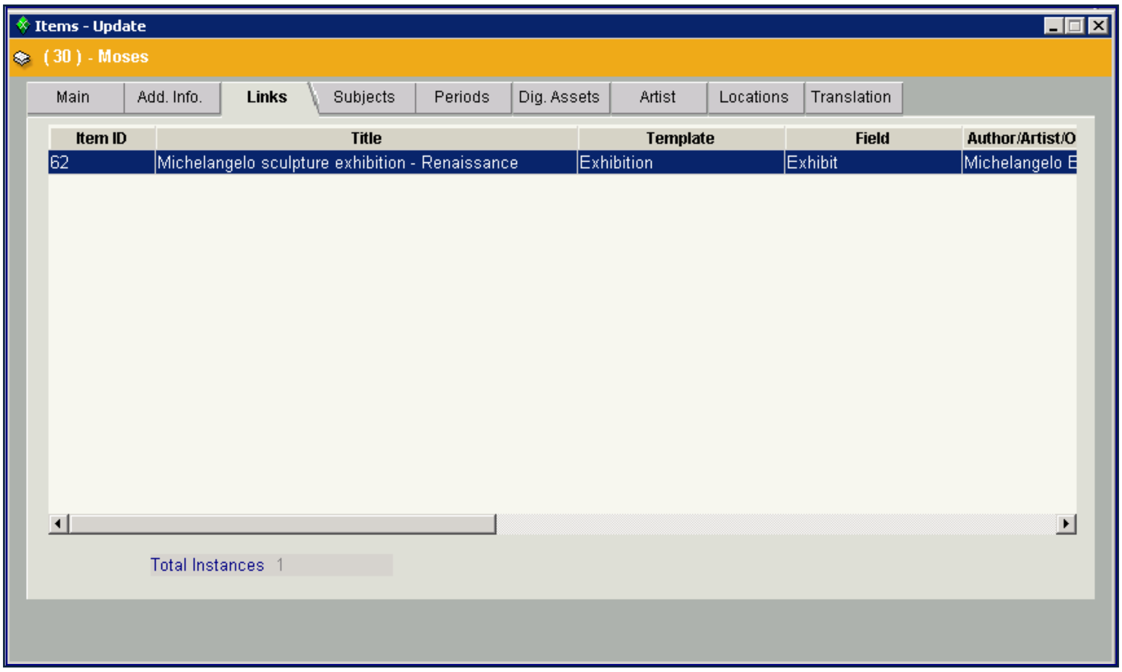
Adding a Client to the Waiting List

From the **Waiting List** tab, select the **Insert Row** icon 

from the secondary toolbar. The **Clients List** will be displayed. Select a client from the list by double clicking or by highlighting and clicking **Select**. A new client can be added by selecting **Add**, filling in basic details in the **Clients – Add** screen and selecting **OK.**

Once the clients have been added to the **Client List** save the list.

Links Tab



The **Links** tab displays all the items to which the current item is linked, and the type of these links. Items are linked using link fields. This includes logical links and hierarchic links. The tab is used for display only.

Dynamic Tab

Dynamic tabs are three additional tabs that are used to attach additional fields to an item, thus allowing flexibility when cataloging. The **Dynamic** tabs are added and defined at the template level. **Dynamic** tabs have the same format as the **Main** tab.

Note: **Dynamic** tabs are added to the template and named in **Templates / <Template Name> / Tabs tab**. The specific fields that will be used in the user defined tabs are determined in **Templates / <Template Name> / Input Fields tab**.

Item Groups

Item Groups are used to attach items to a group with a common denominator, in order to enable quick processing of all items as one unit. For example, designated books for a specific course, or a group of items for an exhibition. Actions that are executed in the group will apply to all of the items belonging to it, for example a group loan.

Selecting **Item Groups Definition** displays the list of current item groups. From this screen it is possible to insert, update and delete item groups.

Creating a New Group:
Select the **Item Groups Definition** option from the **Cataloging** menu. The **Item Groups Definition** window will be displayed with all the defined item groups. Select the **Insert** 

icon from the secondary toolbar. The **Item Groups Definition – New** window will be displayed with an empty item group notebook.

The **Code** field is a unique group identifier. The field's default value is *[num]*. This value is used to automatically allocate an item group ID number by the system. It is recommended to use this allocation method by leaving this value intact. To ascribe a number manually, highlight the value *[num]* and type or scan the desired number.

Fill in the description of the group and an optional note and save. The item group will be created and items can be added to the group using the **Items** tab.

Attaching Items to a Group
From within the item group notebook, select the **Items** tab. The tab displays all the items that have already been attached to the group, and is initially empty. Select the **Insert Row** icon 

from the secondary toolbar. The **Items** list will be displayed. Select an item by double clicking on it or by highlighting it and clicking **Select**. The item will be added to the group.

In order to add a number of items to the items group, mark the **Select Group** checkbox. An additional items list will be opened on the lower part of the screen. Highlight an item and select the down arrow. The item will appear on both the upper window and the lower window. Repeat for all the items that are to be added to the items group and click **Select**. The items will be added to the group.

Removing an Item from a Group
From within the item groups notebook, select the **Items** tab. Highlight the item to be deleted and select the **Delete Row** icon 

from the secondary toolbar. The item line will be deleted from the **Items** tab and the item will no longer be attached to the group. The item itself will not be deleted.

Notes:

1. It is also possible to create a new group from the **Group** tab in the item notebook. See the **Groups Tab** section above for more details.
2. Items can also be added to the group using the **Cataloging / Items in Group** option.

Periodicals

The cataloging of periodicals is different from the cataloging of other items. Periodicals are managed using four different levels.

The Title Level
The first level is the title level. This level refers to the periodical as a whole. The periodical is cataloged once, like other items, and is managed in the item notebook. The item is defined as a periodical in the item template.

The Subscription Level
The subscription level has to do with the dates of the subscription, the frequency of the periodical (monthly, quarterly, etc.), the price and the number of copies. This level is managed using the item notebook's **Subscription / Volume** tab. Details are registered once a year, upon the renewal of the subscription.

The Issue Level
This level has to do with the tracking and registering of the receipt of every issue, and is managed using the item notebook's **Issues** tab.

The Copy Level

The copy level has two parts: the copy number and the individual copy. The copy number refers to a specific copy for each issue. For example, the first copy of every issue might be placed in the reading room, whereas the second copy might be sent to a distribution list. The individual copy refers to one actual copy of an issue. Copies are managed using the item notebook's **Issues** tab.

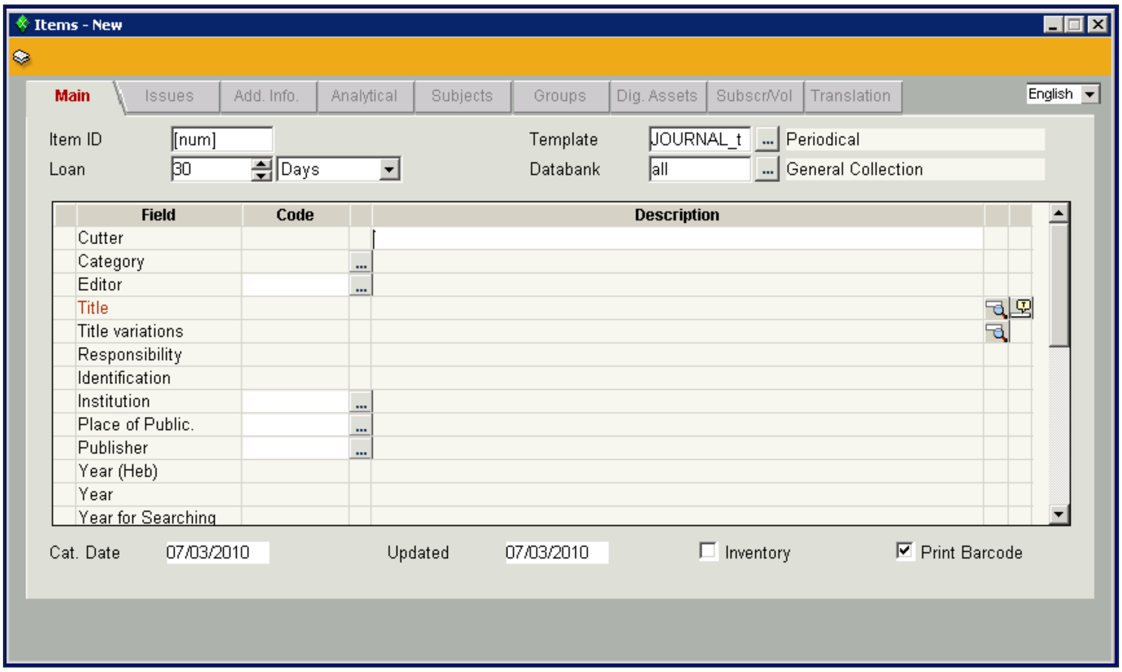
Note: The item number of a periodical identifies the periodical in its entirety. The identification of the issues and the single copies is accomplished using the issue details and each copy's barcode number. It is recommended to mark every copy with the barcode number that is allocated to it upon its receipt.

Cataloging A New Periodical

From the **Items** list, select the **Insert** 

icon from the secondary toolbar. The item notebook will be displayed in the **Items – New** window.

In the template field select the periodical template.



Fill in the details in the **Main** tab and save. The **Subscription/Volume** and **Issues** tabs are specifically related to periodicals. All the other tabs are filled in the standard way. See **The Item Notebook** section above for details.

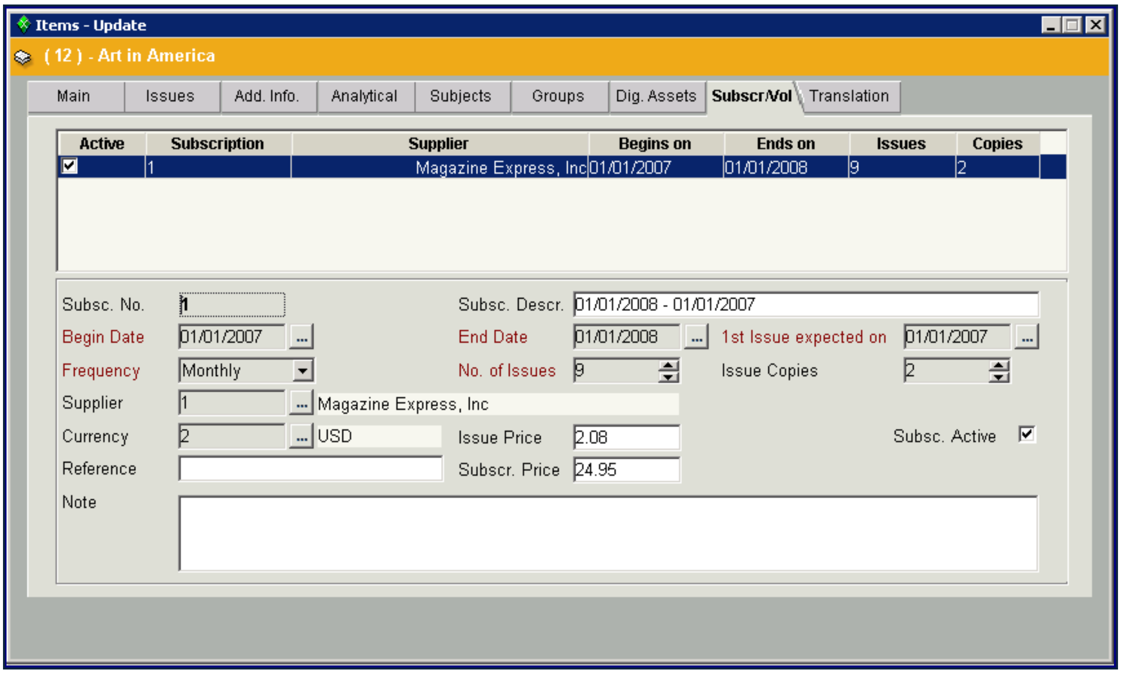
Notes:

1. Make sure that the periodical template is ascribed to the correct databank.
2. In the **Subjects** tab it is possible to link the keyword that has been selected to the specific issue in which it appears, using the **Pages/Issues** column.

Subscription/Volume Tab

After the **Main** tab has been filled in and saved, select the **Subscription/Volume** tab. The tab is used to define the dates of the subscription, the frequency of the periodical (monthly, quarterly, etc.), the price and the number of copies. The data in the

Subscription/Volume tab defines the distribution of the issues for the periodical, which will be displayed in the **Issues** tab.



Subscription Period

The subscription period is defined by the **Begin Date**, **End Date**, and **1st Issue Expected On** fields. It is recommended to configure a period of at least one year. If the subscription period is shorter it is possible to update the issue details in the **Issues** tab.

The **Subscription Description** field will be filled in automatically if left empty. It can also be used for a free text description.

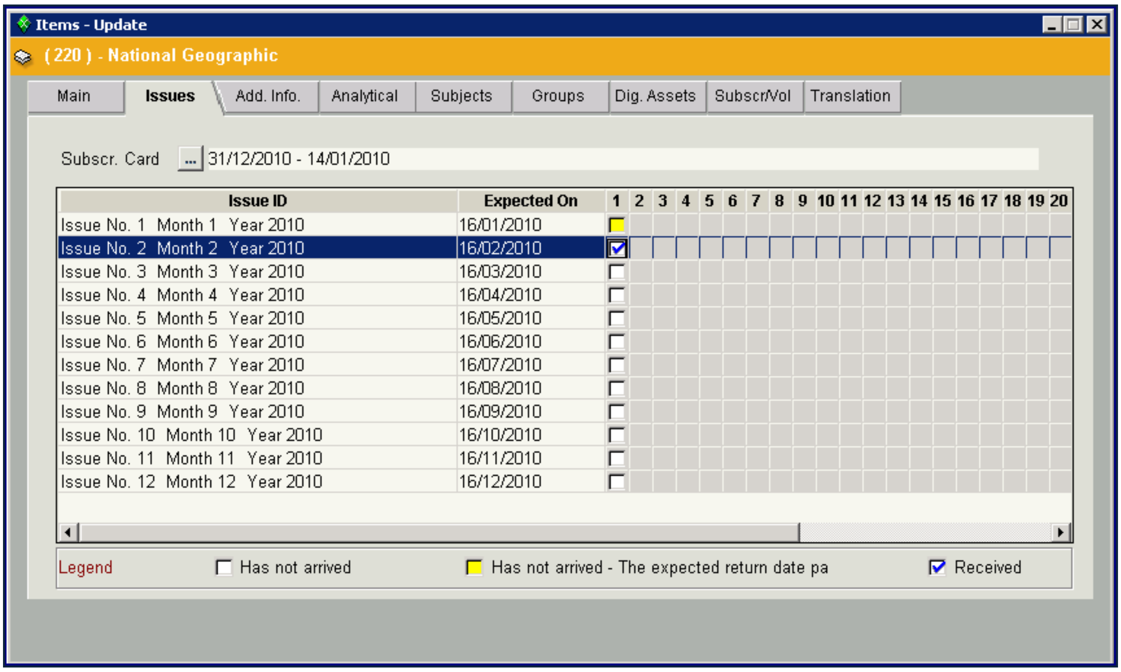
Frequency

Select the frequency of the periodical from the drop down menu in the **Frequency** field. The **Number of Issues** field will be filled automatically. For example, when choosing *quarterly* the value *4* will automatically be entered. Four issues will be distributed automatically in the **Issues** tab, in equal spaces according to the subscription period.

If the number of issues changes, it is possible to register the details in the **Issues** tab.

It is also possible to enter a number in the **Frequency** field, for example, enter 36 for a periodical that is published 10 times a year. The **Number of Issues** field will be filled automatically.

After filling in the fields in the **Subscription/Volume** tab and saving, the **Issue Spread for Subscription** window will be displayed.



The window displays the details of the issue identification as they have been defined in the **Subscription/Volume** tab. Confirm the details, or change the values of the identification string, initial year, month, and issues counter. If the number of the first issue that will be received is a running number, enter a number that is one less than the number of the first issue.

Distribution lists for each copy can be defined here, or in the **Issues** tab.

Issues Tab

The **Issues** tab becomes active once the **Subscription / Volumes** tab is filled and saved. It displays the distribution of the issues and the expected copies based on the information entered in the **Subscription / Volumes** tab. The tab is used to register the receipt of issues and copies. See the **Updating Receipt of Issues and Copies** section below.

Updating Receipt of Issues and Copies

It is possible to perform actions at the issue level, the single copy level, or the copy number level for all the issues.

Issue Level

From within the **Issues** tab, right click on an issue. A menu will be displayed with the following options:

Retrieve All Copies	The **Periodicals Barcode** window will be displayed, listing the barcode number for each copy. After confirmation, all the copies in the **Issues** tab will be marked as received with a checkmark✓. Select the **Distribution List** button at the bottom of the screen. If a distribution list has been configured for the

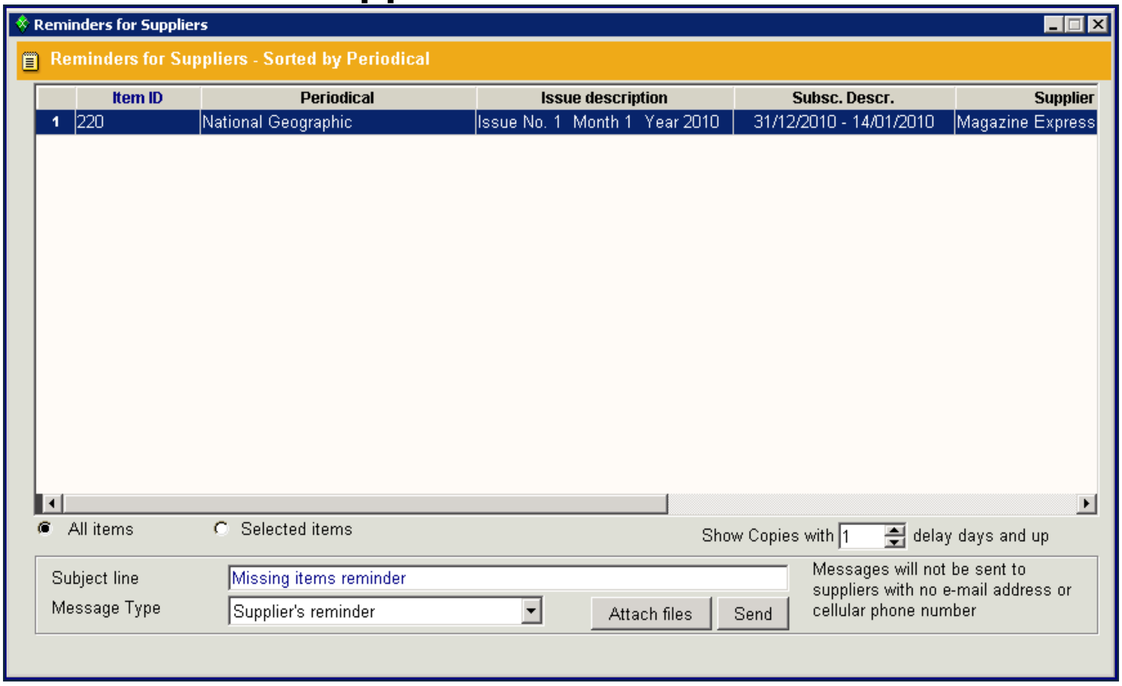
	periodical, it will be displayed in the **Distribution List** window for viewing and printing.
Update Issue Details	The **Periodicals – Horizontal Copies Update** window will be displayed with the issue details, which can be updated.
Delete Issue	Delete the issue and all its copies from the issues list.
Add New Issue	The **Issue to Periodical Addition** window will be displayed. Fill in the issue and copies details and the expected date of receipt and select **OK**. The new issue will be added to the issues list.
Add New Copy	The **Periodicals – Copies** window will be displayed. Fill in the details and select **OK**. An additional copy will be added to the issue on the issues list.

Copy Level
From within the **Issues** tab, right click on a specific copy (that is, on a box that is either marked with a checkmark✓, blank or yellow. The markings indicate that the copy has been received, has not been received or has not been received and is late, respectively). A menu will be displayed with the following options:

Mark As Received	If the copy has already been received (that is, it has a checkmark) nothing will happen. If the copy has not been received, it will be marked as received with a checkmark✓, and the **Periodicals Barcode** window will be displayed, listing the copy's barcode number. Select the **Distribution List** button at the bottom of the screen. If a distribution list has been configured for the periodical, it will be displayed in the **Distribution List** window for viewing and printing.
Update Copy Details	The **Periodicals – Copies** window will be displayed with the copy details, which can be updated.
Delete Copy	Delete a single copy.
Cancel Received Mark	The copy will be marked as not received, that is the checkmark✓, will be removed.
Distribution List	The copy's distribution list will be displayed in the **Distribution List** window for viewing and printing.

Copy Number Level
From within the **Issues** tab, right click on any copy number. The **Lengthwise Update of Copies Data for Copy Number** window will be displayed for viewing and updating. This window includes information about a specific copy number. For example, the first copy of every issue might be placed in the reading room, whereas the second copy may be sent to a distribution list. The information in the window includes the copy location, branch, supplier, databank, distribution list, and delivery recipient.

Reminders for Suppliers



The **Reminders to Suppliers** option is used to send reminders to suppliers regarding missing periodical issues. The reminders are sent via e-mail or SMS messages.

Select the **Reminders to Suppliers** option from the **Cataloging** menu. The **Reminders to Suppliers** list will be displayed. This is a list of periodicals where there are missing issues. The list contains all the required information on the missing issues: item number, periodical name, supplier name, total missing issues, start date and end date of subscription, and e-mail address. It is possible to filter the list by running a query on it, using the **Query** 

icon from the secondary toolbar.

Select the **All Items** button to send reminders for all items on the list.

Select the **Selected Items** button in order to send reminders for selected issues. Select the desired issues by holding the **CTRL** key and highlighting them.

Enter the number of days of delay that warrants sending a message in the **Show copies with <number> Delay Days and Up**.

Enter the subject that will be used in the e-mail message in the **Subject Line** field. Select the relevant message type from the **Message Type** drop down menu. It is possible to attach additional files to the message by selecting **Attach Files**.

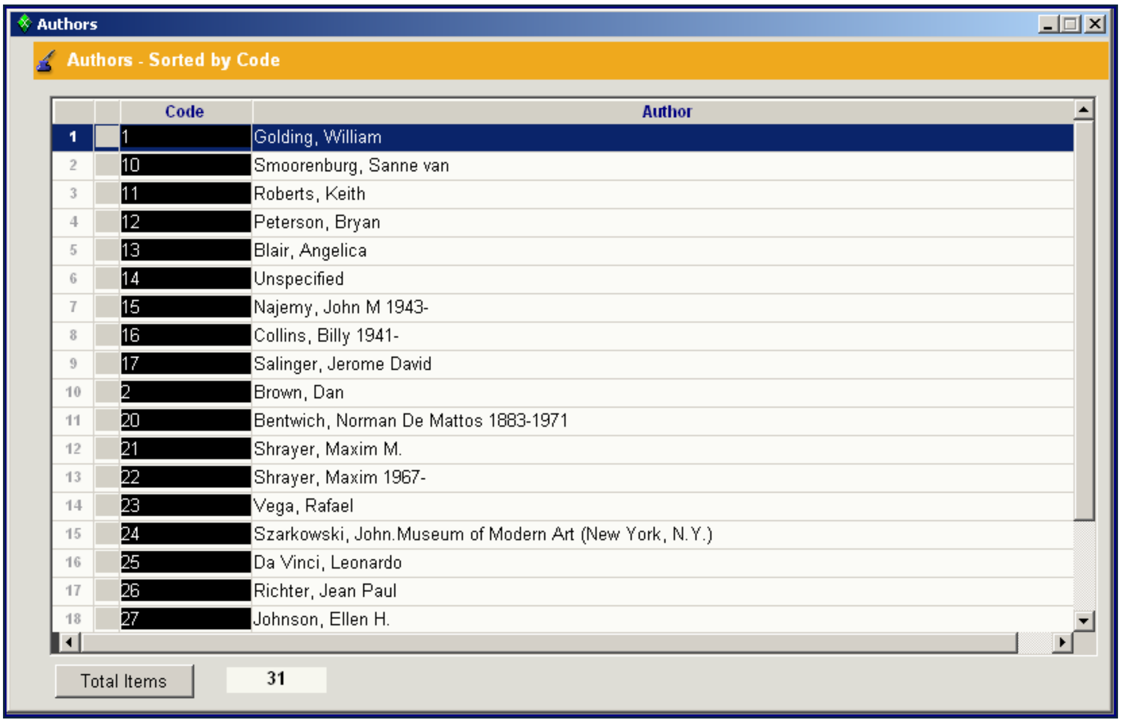
Select **Send**. A confirmation window will be displayed. Select **OK**. The message will be sent to all the suppliers in the filtered list that have a registered e-mail address or cellular phone number. The message sent applies to all the supplier’s missing periodical issues.

Authors

The **Authors** option is used to manage authors. This includes adding and deleting authors from the library's authors list; updating information about the author; viewing, updating, adding and deleting items written by the author from the author's item list;

The Authors List

When the **Authors** option is selected from the **Authors** section, the **Authors** list is displayed.



The **Authors** list is a list of the authors that have been entered in the system. Authors are viewed, added, deleted and updated from the list, the same way items are handled from the **Items** list. See the **Items List** section above for more details.

Note: Authors that are linked to items will not be deleted.

The Author Notebook

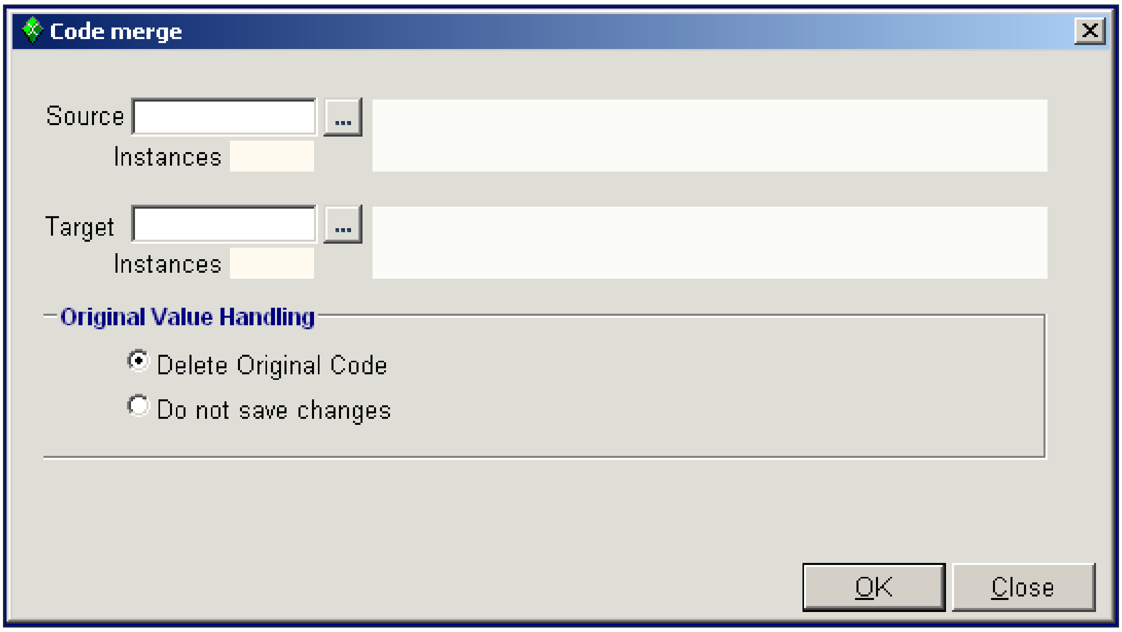
When adding a new author or selecting an author from the **Authors** list, the author notebook is displayed, with the **Main** tab as the active tab. The **Main** tab includes the author's ID code, name, status, and additional comments. The **Reference** tab is used to add "See also" references to the author. The **Item List** tab lists all the works by the author that have cataloged in the current databanks. Select the **Total Instances** button at the bottom of the tab to see how many items are on the list.

See the **Item Notebook** section above for more details about working with notebooks.

Merging Authors

This is a repair function that is used when the author has been added to the **Authors** list a number of times through various means. It unites the instances of the author into one correct name and one ID code, without losing any if the items that are linked to the author.

From the **Authors** list, select the **List** drop down menu from the menu bar. Select **Code Merge**. The **Code Merge** window will be displayed.



Enter the instance of the author that will be canceled in the **Source** field. Enter the instance of the author that will be retained in the **Target** field. The items linked to the author in the **Source** field will be transferred to the author in the **Target** field. Mark either the **Delete Original Code** button to delete the source author from the Author's list or the **Do not Save Changes** button to retain the source author on the list, even though all the items linked to the source author will be transferred to the target author's item list.

Select **OK**. Once a confirmation is received about the successful completion of the function, select **Close**.

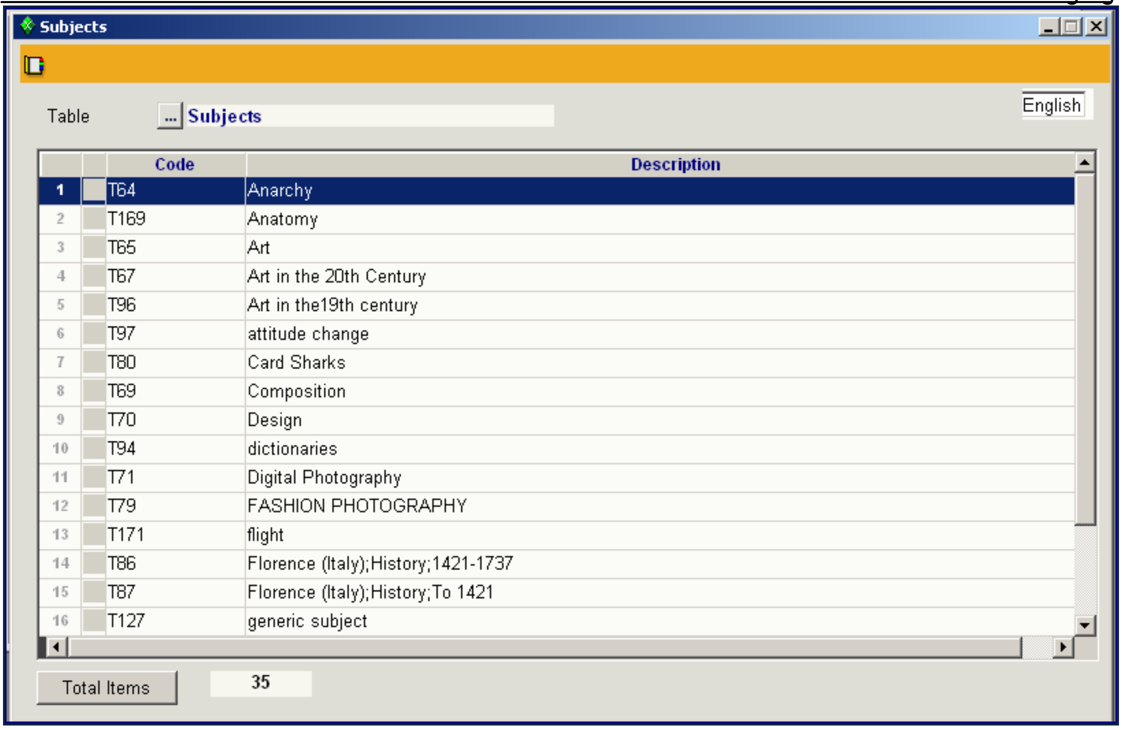
Subjects

The **Subjects** option is used to define subjects that can then be linked to items using the item notebook's **Subject** tab.

The Subjects List

When the **Subjects** option is selected from the **Cataloging** menu, the **Tables** window is displayed, listing the subject tables that are defined in the system. Each subject table is a list of subjects of a certain type. Select one of the subject tables. The list of subjects will be displayed.

Note: For most installations only one table is relevant – the **Subjects** table. Multiple subject tables are relevant for MARC users and for installations that manage a complex relation and hierarchy of subjects.



Subjects are viewed, added, deleted and updated from the list, the same way items are handled from the **Items** list. See the **Items List** section above for more details.

The Subjects Notebook

When adding a new subject or selecting a subject from the **Subjects** list, the subject notebook is displayed, with the **Main** tab as the active tab. The following tabs are used to manage the subjects.

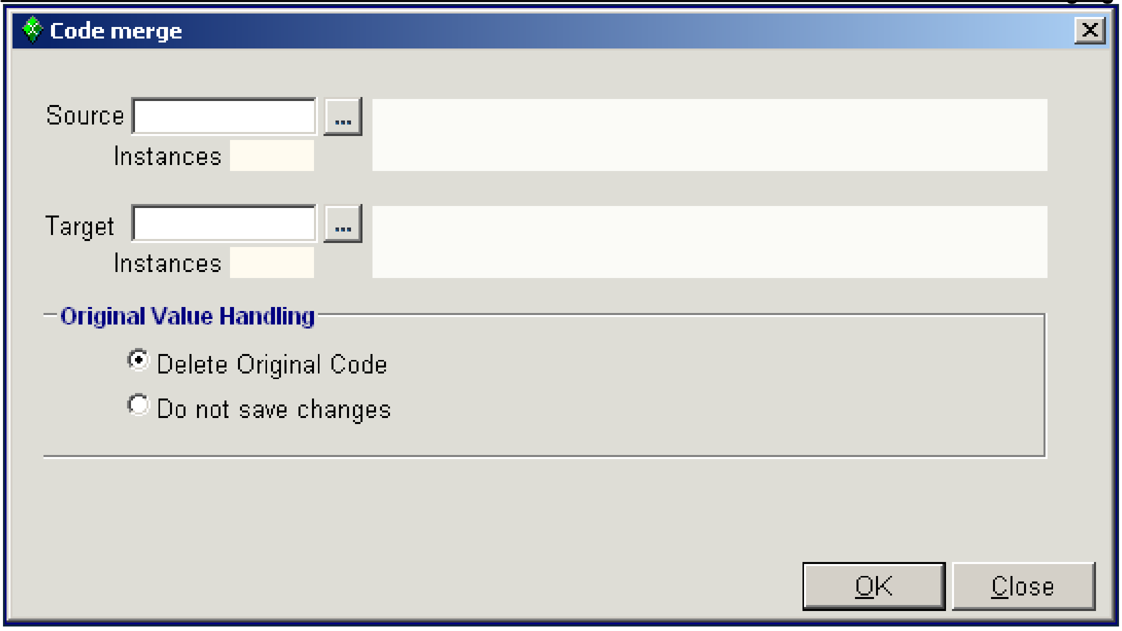
Main	Subject's ID code, name, link to other subjects and various comments.
Add. Info.	Free text for additional information.
Items	Items linked to the subject.
Translation	Used to translate the content of the fields belonging to the subject.
Synonyms	Relevant in systems that use synonyms dictionaries.

See the **Subjects Tab** section above for more details about working with subjects and the **Item Notebook** section above for more details about working with notebooks.

Merging Subjects

This function is used to transfer all the items linked to one subject to another subject.

From the **Subjects** list, select the **List** drop down menu from the menu bar. Select **Code Merge**. The **Code Merge** window will be displayed.



Enter the subject that will be canceled in the **Source** field. Enter the subject that will be retained in the **Target** field. The items linked to the subject in the **Source** field will be transferred to the subject in the **Target** field.

Mark either the **Delete Original Code** button to delete the source subject from the **Subjects** list, or the **Do not Save Changes** button to retain the source subject on the list, even though all the items linked to the source subject will be transferred to the target subject's item list.

Select **OK**. Once a confirmation is received about the successful completion of the function, select **Close**.

Digital Assets

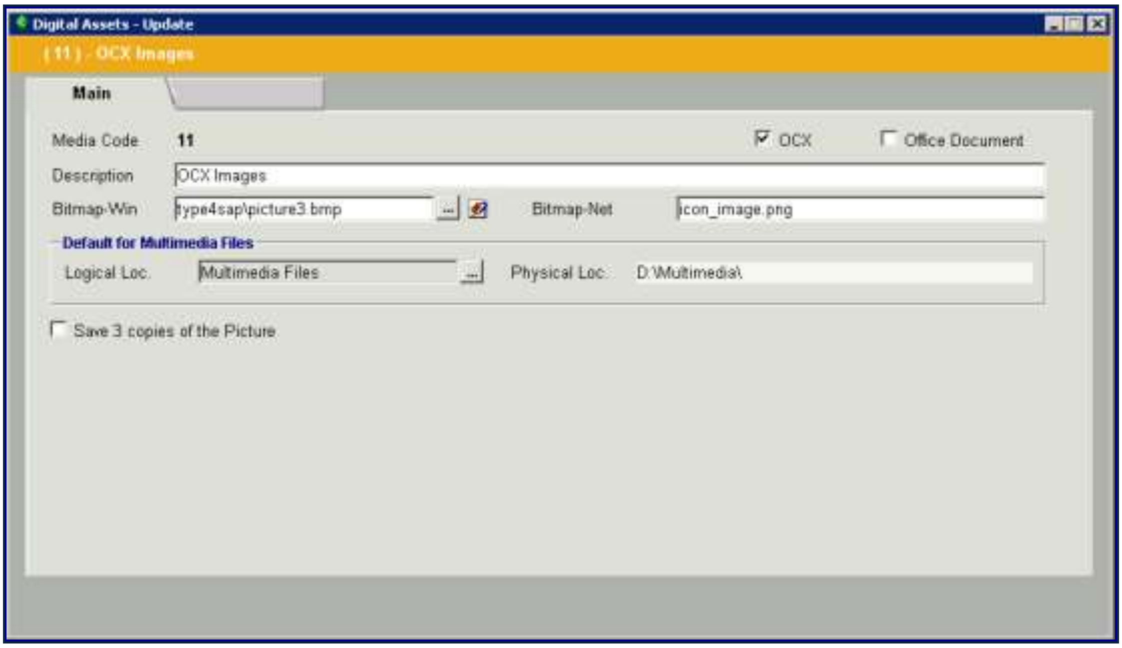
The **Digital Assets** option is used to define the types of digital objects that can be linked to items.

When **Cataloging / Digital Assets** is selected, the **Digital Assets** table is displayed. The table includes predefined digital objects types, and additional types that are added by the user.

Note: Changes made in the digital objects type definitions do not affect existing digital object links.

The Digital Assets Notebook

When adding a new digital object type or selecting a digital object type from the **Digital Assets** table, the digital object type notebook is displayed. The notebook is comprised of one tab: **Main**. The tab has the following parameters:



Media Code	The digital object type's unique ID code.
OCX	Relevant for image files. The OCX program provided by IDEA@ALM enables flexible viewing of image files without the need of an additional external application. The image files may be displayed when search results are displayed in the album format. Mark the checkbox to open the image using IDEA@ALM's built-in image viewer.
Office Document	Mark the checkbox to indicate that the digital object type is a Windows Office document.
Description	Free text. The digital object type's name.
Bitmap-Win	Define an icon that will be displayed next to the digital object type.
Bitmap-Net	Define an icon that will be displayed next to the digital object type in the **Web** module.
Save 3	Mark the checkbox in order to automatically save three copies (or

Copies of the Picture	less) of an image file. All the copies are saved under the name of the original file, but in different libraries.
Default for Digital Object Files	The default for the location of digital object files is identical for all file types, except for one instance in which the logical location is empty: URL addresses.

Physical Location of Digital Object Files

It is recommended to save all the digital object files that will be linked to items in one folder, preferably in the folder where IDEA@ALM is installed. This will be the default in new installations. Subfolders may be used, according to the file type or any other logical division.

Note: For systems using the Web interface, the recommendation is different. Please contact the IDEA support team for details.

Thumbnails

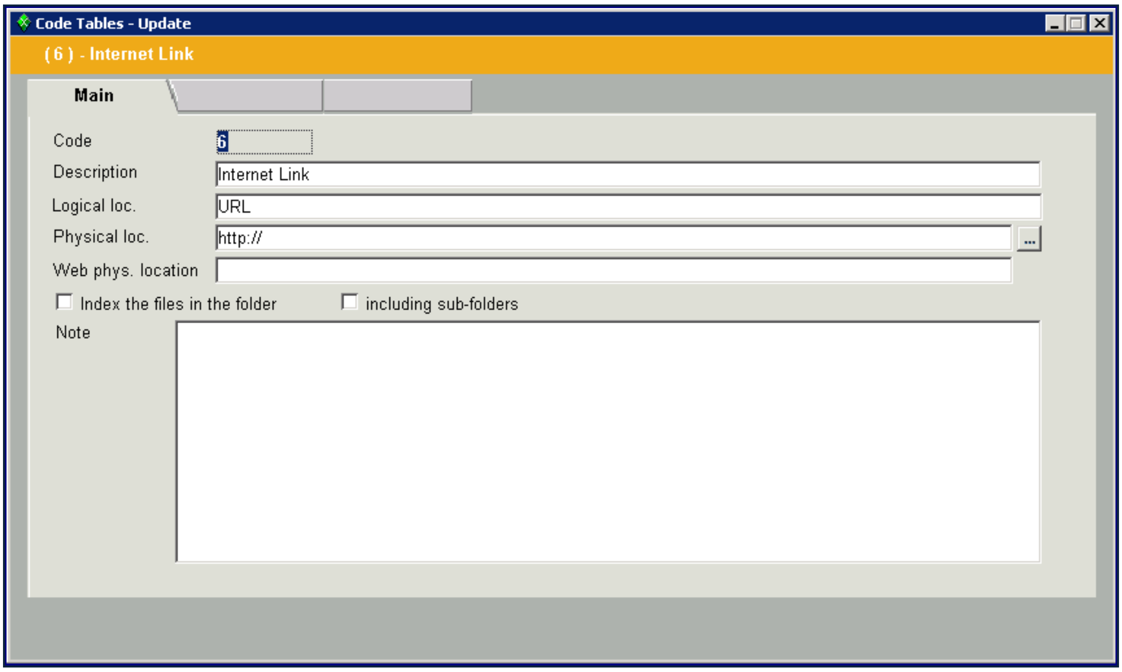
Thumbnails of image files should be reduced by 60px. The reduced files must be saved under a separate thumbnails folder named thumbnails. with subfolders that are named exactly the same as the image subfolders. For example:

```
\ideaalm\multimedia\images
\ideaalm\multimedia\thumbnails\images
```

Note: There is no need to save reduced images for Internet images. The **Web** module automatically reduces the images in search results.

Defining the Location of Digital Object Files

The location of the digital object files is determined in **Administration / Code Tables / File Location Definitions**.



The **File Location Definitions** table is used to define the logical locations of data files and exe files. One of the records in the table defines the location of the digital object files (data files):

```
\\servername\ideaalm\multimedia
```

Before defining this digital object folder, create a fictitious file under the digital object folder that will be used when setting the definition.

Note: The subfolders for the various digital object types are not defined in **Administration / Code Tables / File Location Definitions**. They are included in the digital object type definition in **Cataloging / Digital Assets**.

An additional record in the table is used to configure Internet addresses as digital object entities:

```
http://
```

Notes:

1. The definition of the logical location field will be identical to the description field.
2. There is no reference to the physical location of the various data files that have been distributed in the subfolders.

External DB1

The external databank is a text file of items that have not yet been cataloged in IDEA@ALM. For example, a library training center's computerized databank. The external databank is displayed as a list. It is possible to import items from it and to export items into it. For example, when a library training center sends continuous updates to its subscribers.

It is possible to execute search queries on the list. See the **Searches** chapter for complete details about searches.

Note: It is possible to work with a number of different external databanks.

Exporting Files to an External Databank

Select the **External DB1** option from the **Cataloging** section. Select the **Insert** icon from the secondary toolbar. Enter the file name in the window that is displayed, and select **OK**. The number of records that have been exported to the databank will be displayed at the bottom left of the screen. When the export process is completed, a window with the number of imported items will be displayed. Select **OK**.

Displaying a Monthly File

Some installations receive monthly external databanks. Select the **External DB1** option from the **Cataloging** section. The **External DB 1** window will be displayed. Select the **Display Monthly File** button at the bottom right of the window. Enter the file name in the window that is displayed, and select **OK**.

Displaying Imported Updates from External Databanks

Select the **External DB1** option from the **Cataloging** section. The **External DB 1** window will be displayed. Select the **Advanced Query** icon from the secondary toolbar. The **Query** window will be displayed. In the **Field Name** field, select **Input Date**. Determine the date or the range of dates that will be used using the other search fields and select **OK**. See the **Searches** chapter for complete details about searches.

Cataloging by Importing Data from an External Databank

First create a new item: Select the **Cataloging** section from the main menu. Select the **Items** option from the **Cataloging** menu. The **Items** list will be displayed. Select the **Insert** icon from the secondary toolbar. The **Items – New** window will be displayed with an empty item notebook.

Select the **External DB1** icon from the secondary toolbar. The external databank's items list will be displayed.

Highlight an item and select **Display** in order to view the cataloged item before importing it.

Highlight an item and click **Select** in order to import it. The details will be imported into the item notebook. Define the number of copies, template, location and loan status and save. In the external databank, the symbol appears next to the item that has been imported.

Item Barcode

This section explains how to allocate barcode numbers to items and how to create the file that is used for printing barcode stickers. The stickers are configured and printed by an external program that uses the file as input. The file can be created from the **Item Barcode** option or from an **Items** list or a **Search** results list.

Barcode Allocation

The system automatically allocates a barcode number for every copy of an item (if an external barcode number has not been entered). The barcode numbers are displayed in the item notebook's **Copies** tab.

Manually Allocating a Barcode

When a new item that has not yet been cataloged already has an assigned barcode from an external source, the barcode must be entered manually.

When cataloging the new item, before saving the **Main** tab, select **Add Barcode to New Copies** from the **Options** drop down menu on the menu bar. The **Copies** window will be displayed. For each copy, type or scan in the external barcode number.

When additional copies arrive of an existing item with external barcodes, the barcode number is entered using the **Copies** tab. Select the **Copies** tab from the existing item’s notebook. Enter the new copy by selecting the **Insert Row** icon 

from the secondary toolbar. A new line will be inserted in the copies list. Type or scan the external barcode number, in the **Barcode** field in the bottom part of the window. Fill in additional details as needed and save.

Producing the Barcode File from The Item Barcode Option

Select the **Item Barcode** option from the **Cataloging** section. The **Item Barcode** window will be displayed. The barcode stickers will be produced for items on the list. Items are added to the list using an advanced query.

Select the **Advanced Query** 

icon from the secondary toolbar. The **Item Barcode** query window will be displayed. There are three types of queries: **Complex Query**, **Barcodes List** and **Item/Copy**. Select the appropriate button to determine the type of query that will be used.

For all three query types, select the **Accumulated Query** checkbox in order to compile the list from multiple queries.

Complex Query
Produce a list of items according to selected search criteria. The item details that can be searched are title, author, category, template, classification code, issue number and item ID. A group of items with sequential ID numbers can be produced using the **Item ID From** and **ITEM ID To** fields. The copy details that can be searched are databank, copy number (including a range), and entry and update dates (including a range).

Select the **Include Periodicals** checkbox in order to include periodicals in the query results.

Fill in the desired query fields and select **OK**. The number of items found will be displayed. Select **OK**. The items will be displayed on the list in the **Item Barcode** window.

Barcodes List
Enter specific barcode numbers in the fields and select **OK**. The number of items found will be displayed. Select **OK**. The items will be displayed on the list in the **Item Barcode** window.

Item/Copy
Enter specific item numbers, with or without copy numbers. If no copy number is entered for the item, all the copies will be added to the item list in the **Item Barcode** window. Select **OK**. The number of items found will be displayed. Select **OK**. The items will be displayed on the list in the **Item Barcode** window.

Note that a group of items with sequential ID numbers can be produced, using the **Complex Query**. See the **Complex Query** section above.

Once the desired items have been retrieved and are listed in the **Item Barcode** window, a file that contains details of the items and their barcode numbers can be produced, and the barcode program can be run on the file to configure and print the barcode stickers.

Select **Create File**. The file that is produced can be in regular text or XML format, and will respectively be named `barcode1.txt` or `barcode1.xml`.

Select **Print Barcode** to activate the barcode program.

Notes:

1. The file format is defined in **Administration / Configuration / Item Barcode / Parameter 6 – Format code for barcode file creation**. Enter *_TEXT_* for regular text format or *BARCODE* for XML.
2. The file's location is defined **in Administration / Configuration / Item Barcode / Parameter 3 – Directory for item barcode files**.

Producing the Barcode File from an Items List or a Search Results List

It is possible to produce a barcode file by exporting items from the main **Items** list (the item list that is displayed when the **Items** option is selected from the **Cataloging** section. See the **Item List** section above), or from the **Search** results list (the item list that is displayed when a search query has been performed. See the **Searches** chapter).

Make sure the active window is the **Items** list or the **Search** results list.

Select from the **List** drop down menu **Export/Import / Export Barcode File**. The **Export to File** window will be displayed. Enter the file name and select **Save**. The barcode file will be exported.

If there are errors in the export process, a message will be displayed upon completion of the export. Select **Yes** to display the errors on the screen. The item number and details of the error will be displayed, and can then be printed, or copied to the clipboard and pasted in a document. The errors can also be viewed in the error log file.

Notes:

1. The file's location is defined in **Administration / Configuration / Item Barcode / Parameter 3 - Directory for item barcode files**.
2. The location and name of the error log file are defined in **Administration / Configuration / Formats for Exporting/Importing Items / Parameter 3 – Log file for import/export errors**.

Producing a barcode file by exporting items in this manner has limitations:

The program displays data on every item copy. It is not possible to select only specific copies. Use the **Item Barcode** option with the **Item/Copy** method in the advanced query to define specific copies.
It is not possible to export periodicals, or items that have a template that is derived from a periodical. The export of periodicals must be done using the **Item Barcode** option.

Code Tables

The system is installed with set code tables that are used in various data fields in the item and user notebooks. Access the **Code Tables** through the **Administration** section. The defined code tables are:

- Notes
- Accompanied Material
- Deposit Destinations
- Internet
- Editions
- Publisher
- Dewey
- Location
- File Location Definitions
- Publisher Location
- Cataloger
- Series
- Status
- Class
- Class – Copy
- Branch
- Suppliers
- Language Codes
- Collation

Notes:

1. The **Authors**, **Subjects** and **Digital Assets** tables that are accessed through the **Cataloging** section and the **Payment Types** table which is accessed through the **Users** section are not on the **Code Tables** list.

2. In addition to the predetermined tables that come with the system, unique value tables that are linked to data fields can be created. See the **User Defined Tables** in the **Administration** chapter and the **Values for User Defined Tables** section below.

When the **Code Tables** option is selected, the **Code Tables** list is displayed with all of the code tables. When a code table is selected from the list, the **Code Tables** window is displayed. The window includes the code table name and all the values in the code table. As with other lists in the system, the **Code Tables** list can be queried. Code table values can be viewed, added, updated and deleted.

After creating a new value or selecting a value from a code table, the code table value's notebook is displayed in the **Code Table – New** window or the **Code Table – Edit** window respectively. The window is comprised of the following tabs:

Main Tab
The **Main** tab includes the code table's unique ID code, description, a free text note and the status (Approved / Unapproved).

References Tab
The **References** tab is used for "see also" references to the code table name.

Items Tab
The **Items** tab is used for display only. It displays the list of items that use the code table.

Select the **Total Instances** button at the bottom of the tab to see how many items are on the list.

Merging Code Table Values

This is a function that is used to merge values in a code table, when identical values appear with different names. It unites the values into one name and one ID number, without losing any if the items that are linked to the values.

From the code table's list, select the **List** drop down menu from the menu bar. Select **Code Merge**. The **Code Merge** window will be displayed.

Enter the code table value that will be canceled in the **Source** field. Enter the code table value that will be retained in the **Target** field. The items linked to the value in the **Source** field will be transferred to the value in the **Target** field. Mark either the **Delete Original Code** button to delete the source value from the code table's list or the **Do not Save Changes** button to retain the source value on the list, even though all the items linked to the source value will be transferred to the target value's item list.

Select **OK**. Once a confirmation is received about the successful completion of the function, select **Close**.

Values for User Defined Tables

The user defined tables are defined through the **User Defined Tables** option, and values are added to the user defined tables using the **Values for User Defined Tables** option. Both these options are in the **Administration** module.

Note: A user defined table can only be deleted after all the values in it are deleted, and this can be done only if these values are not linked to any items.

When the **Values for User Defined Tables** option is selected, the list of all of the user defined tables is displayed in the **Tables** window. When a table is selected from the list, the **Values for User Defined Tables** window is displayed. The window includes the table name and all the values in the table. As with other lists in the system, the tables list can be queried. User defined table values can be viewed, added, updated and deleted.

After creating a new value or selecting a value from a table, the value's notebook is displayed in the **Values for User Defined Tables – New** window or the **Values for User Defined Tables – Edit** window respectively. The window is comprised of the following tabs:

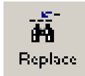
Main Tab

The **Main** tab includes the value's unique ID code, description, title variations and status (Approved / Unapproved).

Add. Info. Tab

This tab is used to enter additional free text information related to the value. This information can then be retrieved using a free-text based search.

The **Add. Info.** tab may support a number of languages. Select the desired language from the list in the **Language** field. Type in the text and save. After saving, it is possible to select an additional language and type in text.

Search for text in the tab, using the **Search** icon  and the **Replace** icon  from the secondary toolbar.

Items Tab

The **Items** tab is used for display only. It displays the list of items that use the value.

Select the **Total Instances** button at the bottom of the tab to see how many items are on the list.

Synonyms Tab

The **Synonyms** tab is relevant in systems that use synonyms dictionaries.

Appendix A: Catalog Fields of a Library Book

Cutter	The three first letters of the author's last name (free text)
Category	Free text or selection from table. Select the … button to select a value from the Dewey sort summary.
Author	Selection from table.
Title	Free text.
Reference	Free text- another name for the title by which it may be searched.
Responsibility	Free text- all persons responsible for writing the book (editor, translator, institute etc.) Alternatively it is possible to insert a relevant field for those performing these tasks.
Place of Publication	Selection from table.
Publisher	Selection from table.
Year	Free text.
Search Year	The program automatically copies the digits from the year field.
Pages	Free text.
Imprint	Selection from table. The content of the book except for the wording (illustrations, tables etc.)
Height	Free text.
Volumes	Free text. Only use this field when the book has two or more volumes.
Accompanying Material	Selection from table. A book's accompanying material, such as tapes, disks, and solutions issues.
Series	Selection from table.
Number in Series	Free text
Language	Selection from table.
Edition	Selection from table.
Location	Selection from table.
Main Branch	Selection from table. Used when the library has branches and the catalog includes items from other branches.
Comment	Free text or selection from table.
ISBN	Free text
ICL num	The number of a training center's external databank that will automatically be inserted when importing an item from the external databank.
Classification	Selection from table.
Cataloger	Selection from table.