



 SirsiDynix
WorkFlows
Staff Client

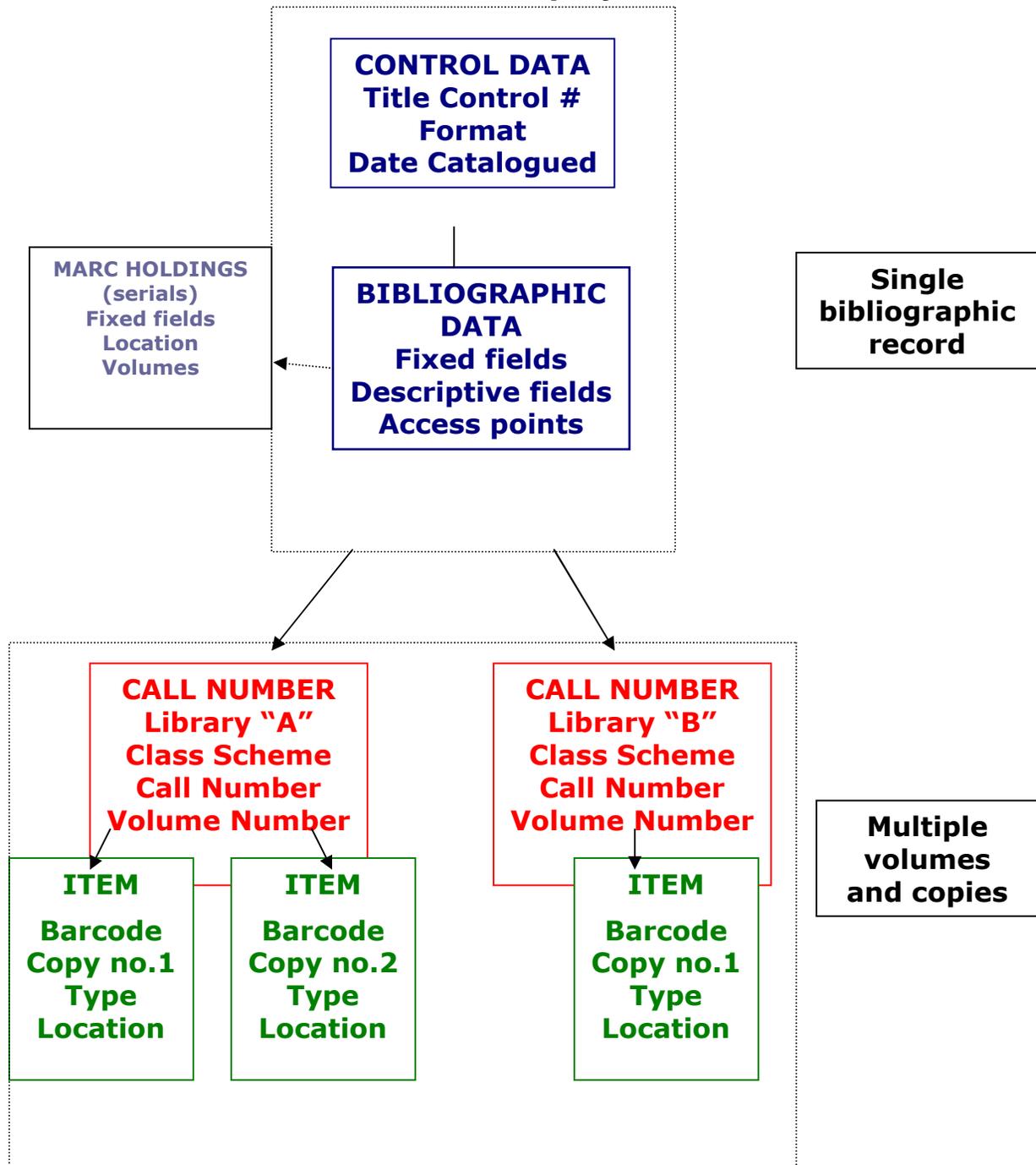
CATALOGUING MANUAL

rev. Winter 2012

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Sirsi Record Structure and Display



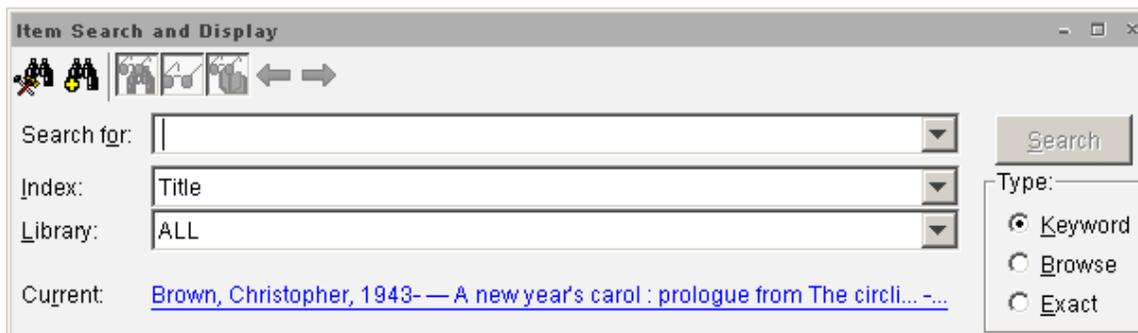
Every record in our Sirsi database consists of various interconnected elements, tied to each other in a relational database. The fundamental principle is simple: a “one to many” relationship between a single bibliographic record and multiple holdings for multiple libraries. That is, there is a *single* bibliographic record for each edition of a given title, to which multiple libraries attach their call number and item records (or for serials, MARC holdings to show which issues they have). This underlying record structure can be seen in the Workflows display whenever an individual record is viewed and edited, or the command **Add Title** is issued for a new record.

Item Search and Display Wizard

Overview

Use the **Item Search and Display Wizard** to produce a “read-only” display of a record with all volumes and copies of a title, and other associated information such as charges, holds, orders, etc. To open a record for editing, use the appropriate cataloguing wizard as described below.

1. Click the **Item Search and Display Wizard** in the Common Tasks group  (shortcut: **F4**). Invoking this wizard brings up a window to begin your search, with a **Search for:** box where you type in your search terms.



Note: This basic search window is used in conjunction with all Cataloguing wizards in Workflows. You can set different default Index and Type values for each wizard.

2. The drop-down list of indexes for searching lets you specify **Title, Author, Subject, Series**, etc. The radio buttons at the right enable you to set the search options:
 - **Keyword** searches bring back all results matching your search term(s) in the specified index, in a list that you can sort by title, author, or date of publication. If no results are found, a supplementary Browse search on your term(s) is done automatically.
 - **Browse** will find the closest matching results within the specified browse index in the alphabetic vicinity of the term you entered, which may then be browsed forward or backward. Your term appears *second* in the list, if it is found.
 - **Exact** lookup will display a single record, if the exact heading is found, and there is only one matching catalogue record. If the exact heading is found, and there is more than one matching catalogue record, a hit list is displayed. If the exact heading is not found, a browse list of neighbouring headings is presented. (The exact option behaves this way using the search indexes for Author, Title, Series, and Subject.)

Current provides a link that displays/reopens the last record opened during the current workstation session; therefore this line will be empty for your initial search.

- Use the **Library** box to select from the drop-down list when you want to restrict your search to a single specific library. (Call number **Browse** searches require you to specify a library).
- Enter your search term and press Enter or click Search. This will retrieve a list of any matching results.

The screenshot shows the 'Item Search and Display' window. At the top, there is a search bar with 'scholarly resources' entered. Below it are dropdown menus for 'Index' (set to 'Title') and 'Library' (set to 'ALL'). A 'Search' button is to the right. Underneath, there are radio buttons for search types: 'Keyword' (selected), 'Browse', and 'Exact'. The main area displays a list of search results under the heading 'KEYWORD Title scholarly resources, ALL: 13 records'. The first result is highlighted in blue:

Title	Author	Pub. Year
Google Scholar and it competitors : accessing scholarly resourc...	Hsieh-Yee, Ingrid.	2009
Scholarly resources for children and childhood studies : a resea...		2007
Scholarly resources for children and childhood studies : a resea...	Bowman, Vibiana, 1953-	2007
Kenkyū to shiryō to jōhō o musubu : "Nihon Kenkyū Gakujutsu ...	Nihon Kenkyū Gakujutsu Shiryō Jōhō No Riyō Seibi Ni Kansur...	2002
Committee of Fifteen records, 1900-1901 : guide to the Scholarl...	Committee of Fifteen (New York, N.Y. : 1900)	1998
A Guide to scholarly resources on the Russian Empire and the ...	Karlowich, Robert A.	1990
Records of the Office of Chinese Affairs, 1945-1955 [microform]		1989
Scholarly resources in art history : issues in preservation : repor...	Commission on Preservation and Access.	1989
Tinker guide to Latin American and Caribbean policy and schol...	Hellman, Ronald G.	1988
Burma, a study guide	Hibler, Anita. Burma, a selective guide to scholarly resources. 1...	1988
British Foreign Office Russia correspondence : guide to the Sch...	Great Britain. Public Record Office.	1980
Understanding China : an assessment of American scholarly re...	Lindbeck, John M. H.	1971
Understanding China; an assessment of American scholarly re...	Lindbeck, John M.H.	1971

Below the list, there is a detailed record view for the selected item. It includes tabs for 'Description', 'Call Number/Item', and 'Open Orders Information'. The 'Description' tab is active, showing the following information:

Leader am a0c
key BKA-2416
Date/time stamp 20060503133429.0
Fixed field data s2009 a b 001 0 eng
ISBN 9781843344476 (pbk.)
ISBN 1843343375 (pbk.)
ISBN 9781843344483 (hbk.)
ISBN 1843344483 (hbk.)
Personal Author [Hsieh-Yee, Ingrid.](#)
Title [Google Scholar and it competitors : accessing scholarly resources on the web / Ingrid Hsieh-Yee.](#)
Publication info Oxford, U.K. : Chandos Publishing, 2009.
Physical descrip 200 p.
592 OISE acquisitions duplicated. then edited tcn 2005036160 for this bib record. aff May 10. 2008.

At the bottom of the record view, there are buttons for 'Detailed Display' and 'Close'. An arrow points from the 'Call Number/Item' tab to the '592' note in the description.

- Highlight the title you want to see. A preview of the bib record in labelled format will display below the hitlist pane along with associated volume and copy (and orders if they exist) information.
- In the preview pane, click the Call Number/Item tab for a quick view of all attached call numbers and copies and the associated circulation information.

Description	Call Number/Item		
<ul style="list-style-type: none"> [-] A Guide to scholarly resources on the Russian Empire and the Soviet [-] Z2491 .G86 1990 - ROBARTS [-]  81781052745171 - 1 - BOOK - STACKS 		Price: \$0.00 Home location: STACKS Item category 1: none Date created: 6/7/2000 Date last charged: Never Last discharged: Never Date inventoried: Never Times inventoried: 0	Item type: BOOK Current location: STACKS Item category 2: none Media desk: none Previous user ID: Last activity: Never Total checkouts: 0 In-house uses: 0

7. To see the MARC format record with *all* associated data, click on the **Detailed Display** button. At this level you are able to see tabs for record data such as: **Control**, **Bibliographic**, **MARC Holdings**, **All Volumes** (if multiple call numbers and/or copies are associated with the title), **Orders**, and **Serials Control**. The **All Volumes** tab lists each item attached to the record with its barcodes and location. To see more information about a particular item or volume, click on the item, then click on the **Display Vol/copy** button at the bottom of the window.

There are some buttons, called “helpers”, at the top left of the search window.

First is the **Configure options for the Item Search** helper  which allows you to limit searches for items in a particular language, format, with a certain date of publication, and so on. You can also set the sort order for search results; e.g. you can list results by title instead of publication date when performing an author search.

After choosing your search index and options, type your search string into the **Search for** and press <Enter>, or click the **Search** button.

Beside that is the **Advanced search** helper  which lets you combine two indexes (e.g. Author and Title) in your search. Click it again to return to the simple search.

The **Show/Hide Search Pane** helper  lets you suppress the display of your search terms after a search, in order to devote more screen space for hitlist and record display.

Similarly, the **Show/Hide Viewer** helper  lets you switch off the preview of each highlighted hitlist entry that normally displays below the hitlist.

Note: The default values and behaviour for every wizard can be modified by adjusting the associated Properties. To open the Properties window, *right-click* on any wizard, and select Properties. All users can change defaults for display, search indexes and search types. An administrative log-in is required to set “behaviour” defaults.

Call Number and Item Maintenance Wizard

Overview

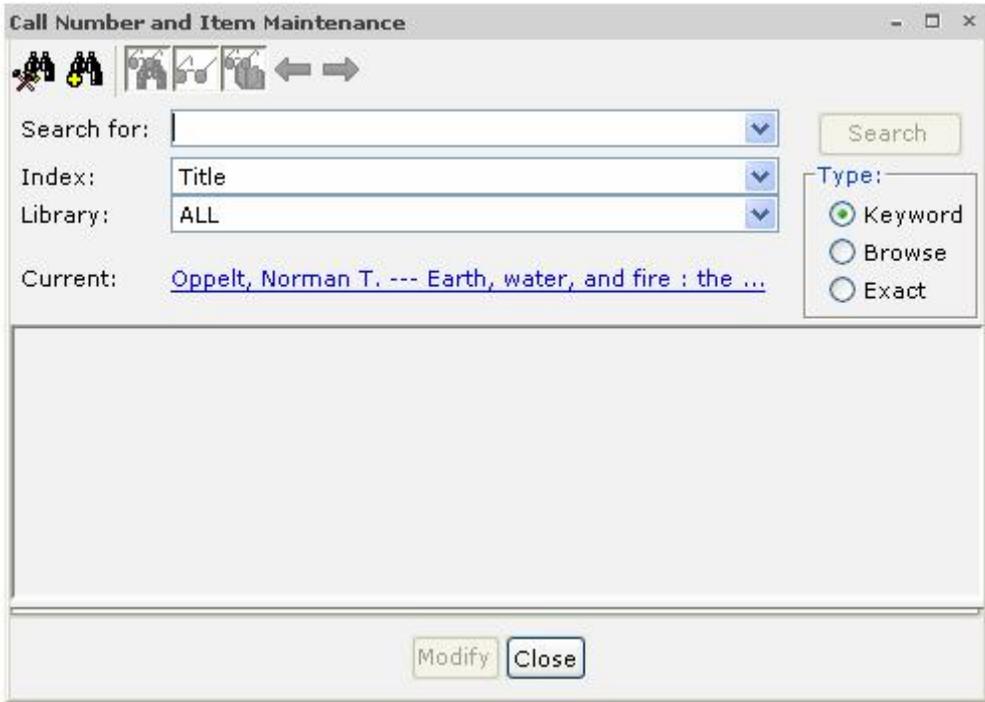
Use the Call Number and Item Maintenance wizard to add, edit, or delete call number and item-level records.

Note You can also use the *Add Items* and *Edit Items* wizards discussed in the Item Maintenance chapter below; these will only allow editing of the item records, not the bibliographic or call number levels.

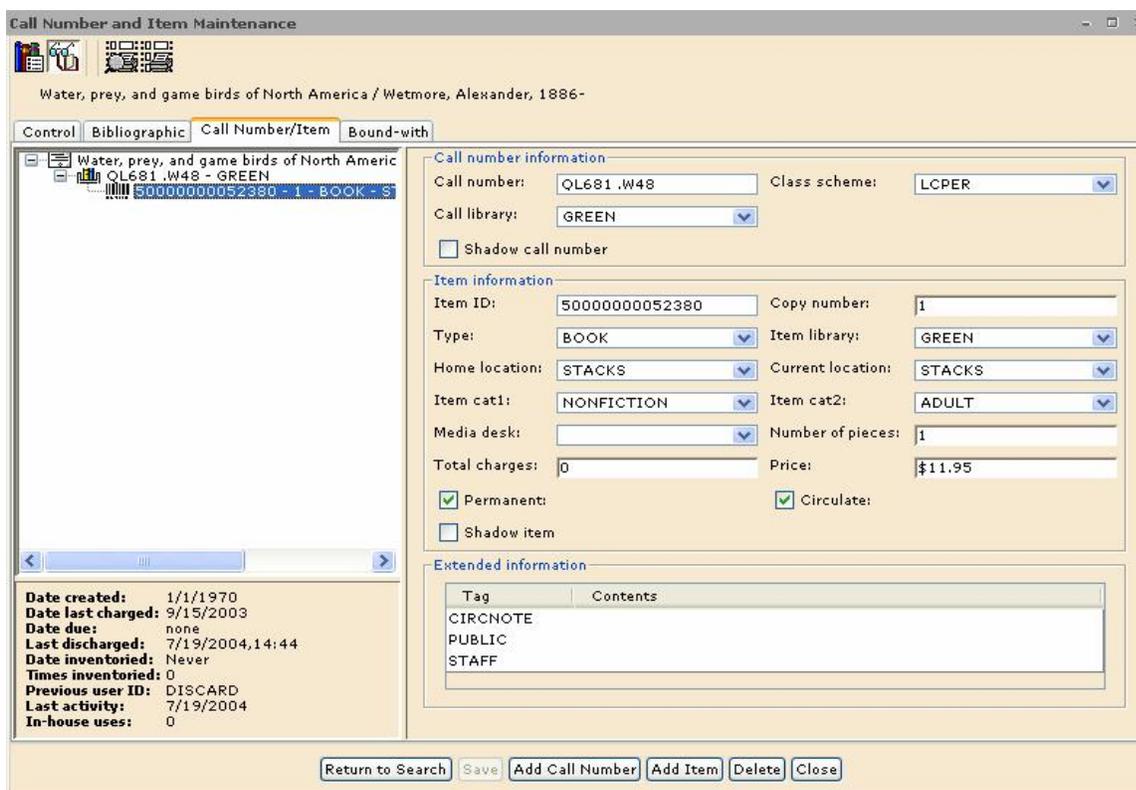
Add Call Numbers/Items

To add a new call number to an existing title

1. Click the **Call Number and Item Maintenance wizard**  (Shortcut: **Shift-F9**). The Call Number and Item Maintenance search window appears:



2. Type search terms in the **Search for** box and click **Search**, or click the **Current** title, if available.
3. Select the correct title from the list, and click **Modify**. The following window appears:

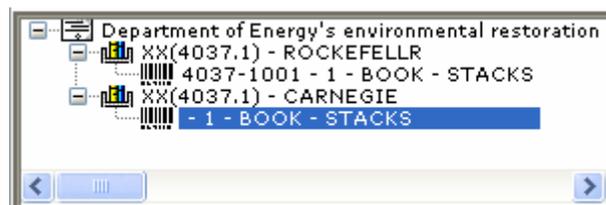


4. Click **Add Call Number**. The following window appears:



Note: This window can be turned off by an administrative user, by changing this default on the Behaviors tab of the Set Properties window.

5. Select the appropriate library, and click **OK**. The Call Number/Item tab reappears with the new call number and item record added to the list



Note: By default, WorkFlows adds an item record when you create a call number record. An administrative user can change this default on the Behaviors tab of the Set Properties window.

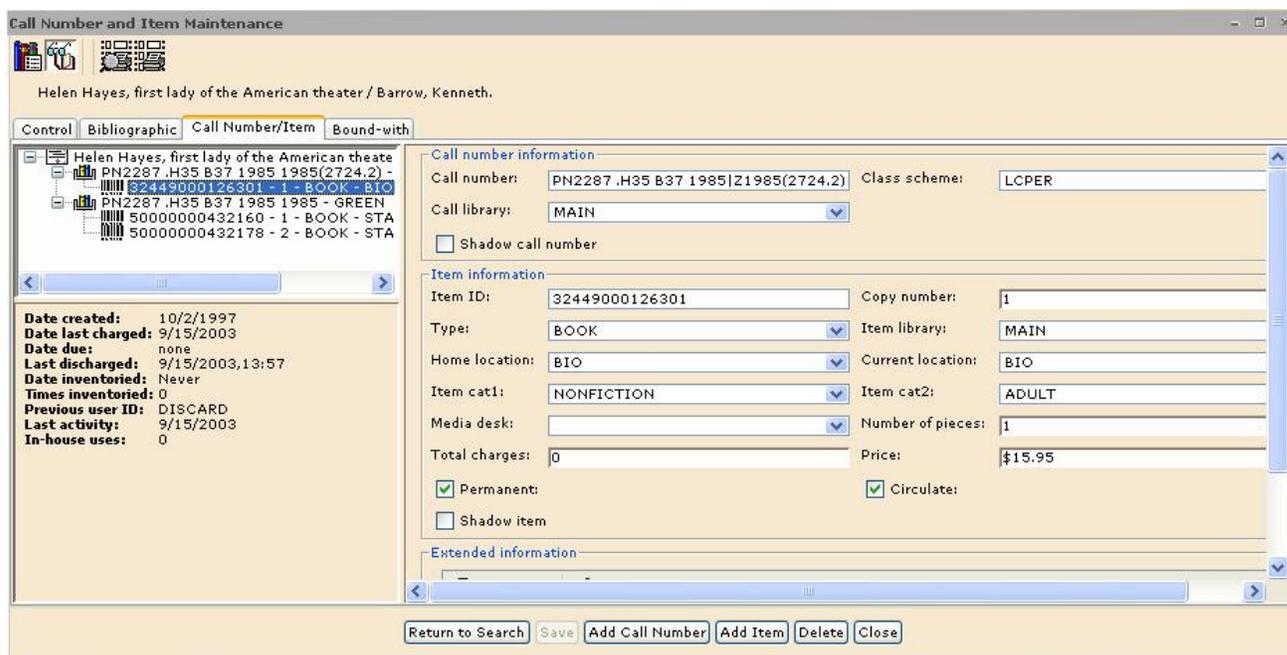
6. Make any other modifications to either the call number or item record.
7. Scan an item barcode, or type an **Item ID**, and click **Save**.
8. Click **Close** when you are finished.

Edit Call Numbers/Items

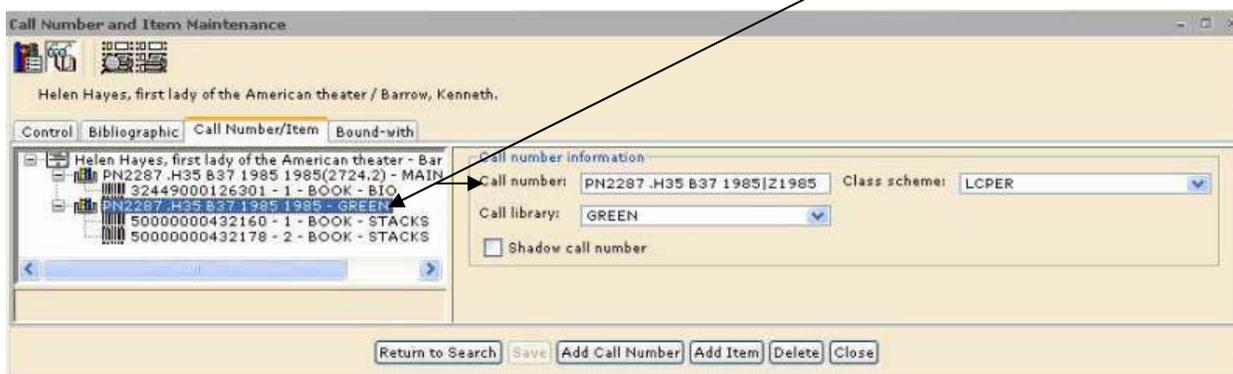
There may be times when you need to change the information in an existing call number or item record, for example: change the item type or location of an item; edit the public note in an item record; or change the call number.

To edit an existing call number record

1. On the Common Tasks toolbar, click the **Call Number and Item Maintenance** wizard. 
The Search window appears.
2. Type your search terms in the **Search for** box and click **Search**, or click the **Current** title, if available.
3. Select the correct title from the list, and click **Modify**. The Call Number/Item tab appears displaying the call number and item information:



6. To display only call number information, click the appropriate call number record:



7. Make modifications to either the Call Number or Item information. Click **Save** and then **Close** when finished.

-
- i. **TIP!** When making a library field change, modify either the Call Library or the Item Library (not both). When the record is saved, the other library field will automatically be updated.
-

Delete Call Numbers/Items

Note You cannot select to remove a call number if the call number being removed is the only remaining call number attached to the title.

To delete an existing call number and item record

1. On the Common Tasks toolbar, click the **Call Number and Item Maintenance** wizard .
 The Search window appears.
2. Type your search terms in the **Search for** box and click **Search**, or click the **Current** title, if available.
3. Select the correct title from the list, and click **Modify**. The Call Number/Item tab appears displaying the item information.
4. Click the call number record to eliminate, and click **Delete**. This will delete both the call number and item records.

Note You can also remove Title, Call Number, and Item records using the **Delete Title, Call Numbers or Items** wizard.

Item Maintenance group

Overview

The wizards in the Item Maintenance group let cataloguers add and edit Item records while limiting access to just the item level. Otherwise, you may prefer to work with items through the Call Number and Item Maintenance wizard as discussed previously.

This chapter discusses the following tasks that you can perform using the Item Maintenance wizard group:

- Add Items
- Edit Items
- Add Ordered Items to Catalogue

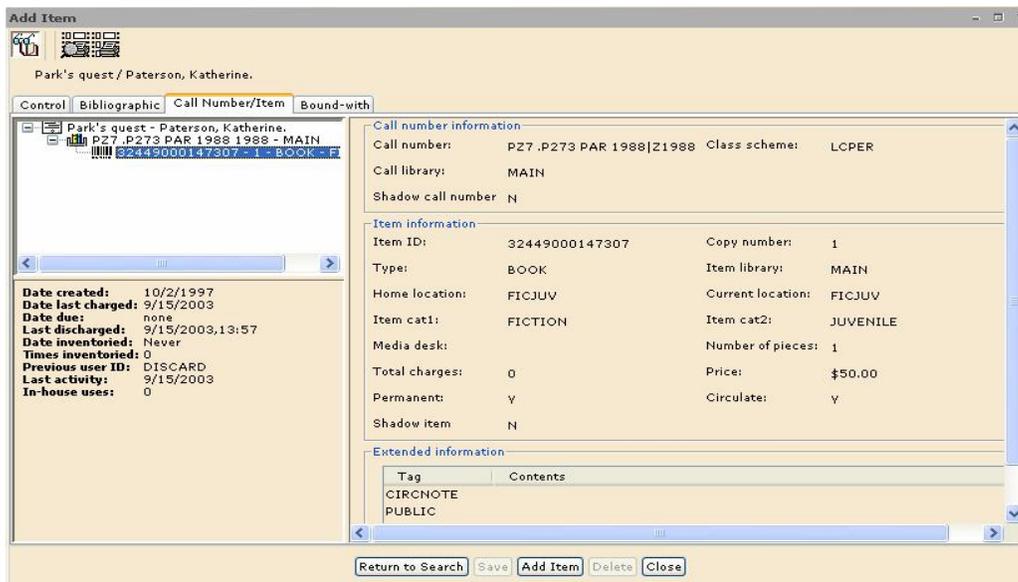
Add Items Wizard

Use the Add Items wizard to add a new item (copy) to existing call number records.

Note Workflows cataloguing wizards are hierarchical, that is, when you use the Item Maintenance wizards to add or modify item information, you cannot change bibliographic information within these wizards.

To add an item to an existing call number record

1. On the Item Maintenance toolbar, click the **Add Items** wizard.  (Shortcut: **F9**). The Search window appears.
2. Enter the title (or other search term) for which you want to add items, and click **Search**.
3. If the search results in a hit list of titles, select the title from the list, and click **Modify**. You can also click the **Current** title, if available. The following window appears:



The screenshot shows the 'Add Item' window with the following details:

Item Information:

Call number:	P27 .P273 PAR 1988 Z1988	Class scheme:	LCPER
Call library:	MAIN		
Shadow call number:	N		
Item ID:	32449000147307	Copy number:	1
Type:	BOOK	Item library:	MAIN
Home location:	FICJUV	Current location:	FICJUV
Item cat1:	FICTION	Item cat2:	JUVENILE
Media desk:		Number of pieces:	1
Total charges:	0	Price:	\$50.00
Permanent:	y	Circulate:	y
Shadow item:	N		

Extended information:

Tag	Contents
CIRCNOTE	
PUBLIC	

Item History:

Date created:	10/2/1997
Date last charged:	9/15/2003
Date due:	none
Last discharged:	9/15/2003,13:57
Date inventoried:	Never
Times inventoried:	0
Previous user ID:	DISCARD
Last activity:	9/15/2003
In-house uses:	0

Buttons at the bottom: Return to Search, Save, Add Item, Delete, Close

Although the Call Number/Item tab looks virtually the same as when you used the Call Number and Item Maintenance wizard, you cannot add or edit call number records.

- Click the call number in the tree to which you want to add the new item, and click **Add Item**. The following window appears:

- Scan or type a new barcode, and make any other changes in the **Item information** and **Extended information** sections.
- Click **Save** to retain the new item record.
- Click **Close** to exit this window.

Edit Items Wizard

Use the Edit Items wizard make changes to item records already in the catalogue. This wizard does not give you access for making changes to the bibliographic or title record.

To change information in an existing item record

- On the Item Maintenance toolbar, click the **Edit Items** wizard .  The search window appears.
- Enter the title (or other search term) for which you want to add items, and click **Search**.
- If the search results in a hit list of titles, select the title from the list, and click **Modify**. You can also click the **Current** title, if available. The following window appears:

Edit Item
 Park's quest / Paterson, Katherine.

Control Bibliographic Call Number/Item Bound-with

Park's quest - Paterson, Katherine.
 P27 .P273 PAR 1988 1988 - MAIN
 32449000147307 - 1 - BOOK

Call number information
 Call number: P27 .P273 PAR 1988|Z1988 Class scheme: LCPER
 Call library: MAIN
 Shadow call number N

Item information
 Item ID: 32449000147307 Copy number: 1
 Type: BOOK Item library: MAIN
 Home location: FICJUV Current location: FICJUV
 Item cat1: FICTION Item cat2: JUVENILE
 Media desk:
 Total charges: 0 Price: \$50.00
 Permanent: Circulate:
 Shadow item

Extended information

Tag	Contents
CIRCNOTE	
PUBLIC	
STAFF	

Date created: 10/2/1997
 Date last charged: 9/15/2003
 Date due: none
 Last discharged: 9/15/2003,13:57
 Date inventoried: Never
 Times inventoried: 0
 Previous user ID: DISCARD
 Last activity: 9/15/2003
 In-house uses: 0

Return to Search Save Close

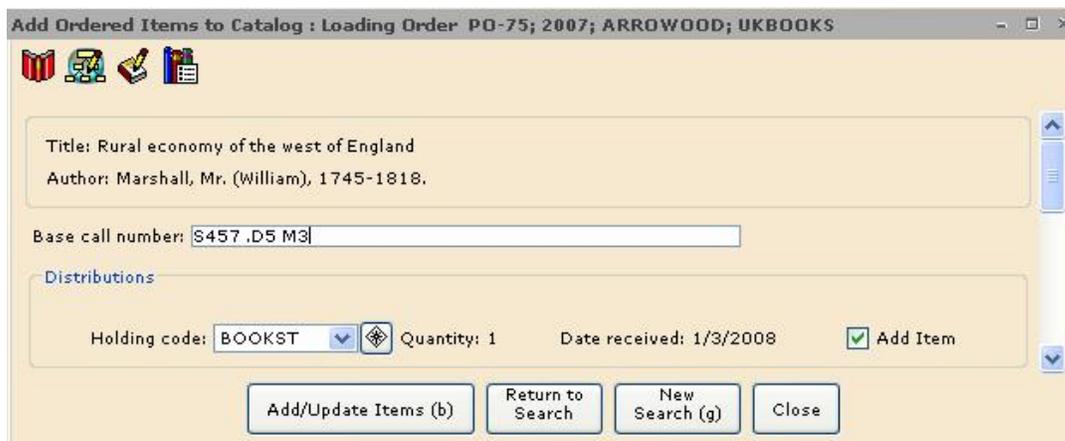
4. Click the item in the tree to which you want to make changes.
5. Make changes in the **Item information** and **Extended information** sections. Click **Save** to retain the new information.
6. Click **Close** to exit this window.

Add Ordered Items to Catalogue Wizard

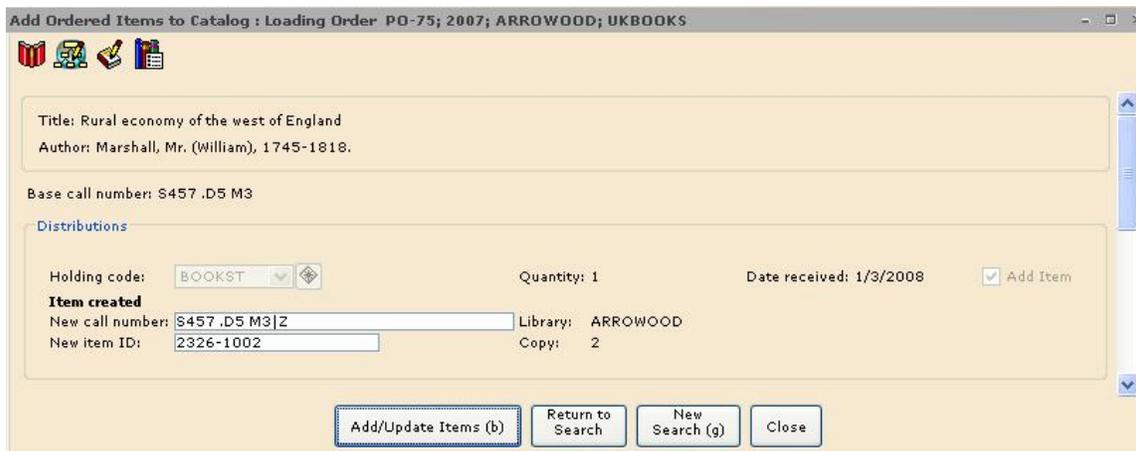
Use this wizard to add copies to Order records when items have been received and are being catalogued. Order records will have a Call number for the ordering library, but no Item record. By using this wizard instead of the Add Items Wizard to add the copy and barcode for a call number to which an Order is attached, you will update the Acquisitions module at the same time as you create the item record.

To add ordered items to the catalog

1. On the Call Numbers and Items toolbar, click the **Add Ordered Items to Catalog** wizard  or press **Alt+F12**.
2. Search for the item you want to load, or select the current record, and click **Load Ordered Copies**. The following window appears:



3. Be sure that the Holding code matches the library name associated with the call number for which you are loading a copy. E.g. if the Order call number has the library COLL_DEV then the holding code must also say COLL_DEV; if you have updated the Order call number to say ROBARTS then the Holding code here must be set to ROBAB. Use the drop-down list to change Holding codes.
4. Be sure the Add Item box is checked, and click **Add/Update Items**. The window reappears with updated information.



5. To barcode the item, scan the **New item ID**, and click **Add/Update Items** to complete the load.

Title Maintenance toolbar

Add Title Wizard

Use the Add Title wizard to create a new bibliographic record and associated call numbers and items. This wizard presumes you have already searched your local catalogue using the Item Search and Display wizard and determined that no other record exists for the material you have in hand. **Workflows will not alert you to duplicate catalogue information.**

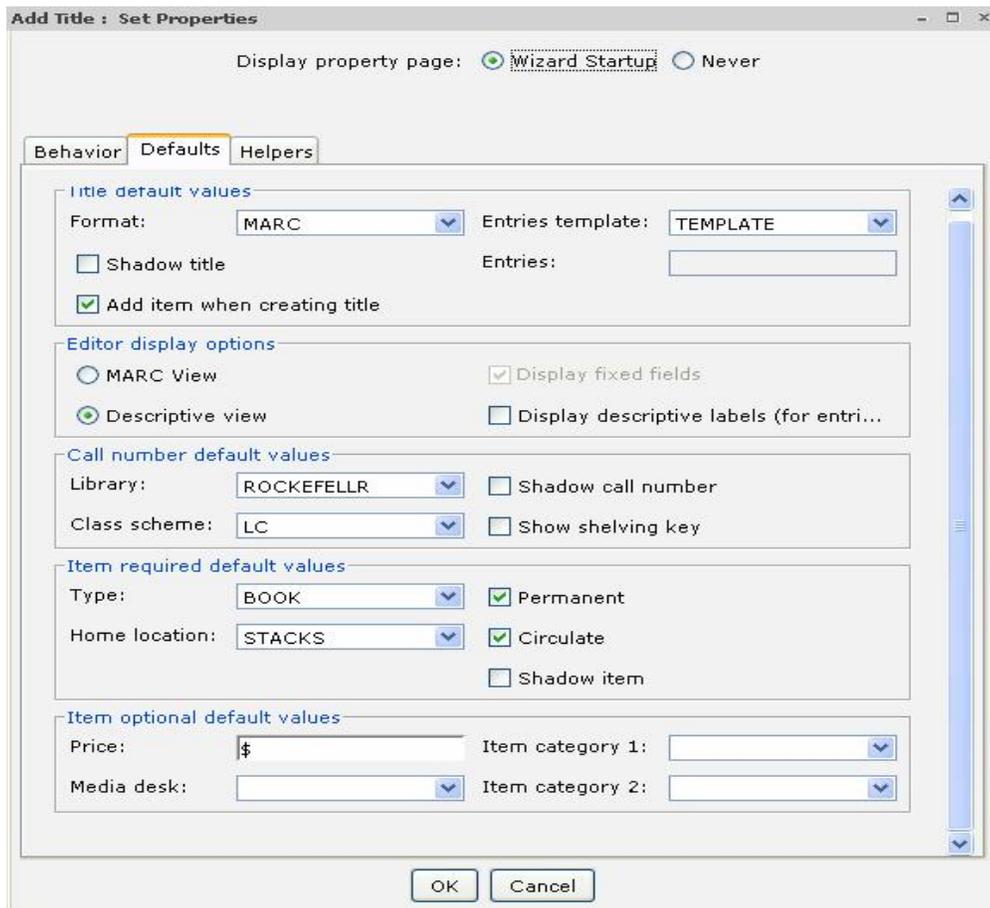
To create a new title

1. On the Title Maintenance toolbar, click the **Add Title** wizard.  (Shortcut: **Shift-F2**). The Set Properties window appears.

Default Wizard Properties

Default properties are visible to all logins and can be saved to the machine when you exit the workstation. Because these properties are saved to the Documents and Settings folder under the Windows login, each Windows user may set individual default properties.

The options listed on the Default tab determine what entries display in the Add Title template.



The screenshot shows the 'Add Title : Set Properties' dialog box with the 'Defaults' tab selected. The window title is 'Add Title : Set Properties'. At the top, there are radio buttons for 'Display property page: Wizard Startup' (selected) and 'Never'. Below this are three tabs: 'Behavior', 'Defaults', and 'Helpers'. The 'Defaults' tab contains several sections of settings:

- Title default values:** Format: MARC, Entries template: TEMPLATE, Shadow title: , Add item when creating title:
- Editor display options:** MARC View: , Descriptive view: , Display fixed fields: , Display descriptive labels (for entries):
- Call number default values:** Library: ROCKEFELLR, Class scheme: LC, Shadow call number: , Show shelving key:
- Item required default values:** Type: BOOK, Home location: STACKS, Permanent: , Circulate: , Shadow item:
- Item optional default values:** Price: \$, Media desk: [empty], Item category 1: [empty], Item category 2: [empty]

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

The values set on this page control the defaults that appear while using this wizard. You can choose to display this page on **Wizard Startup** in order to see the properties page whenever the wizard is selected from the toolbar. (*Recommended*).

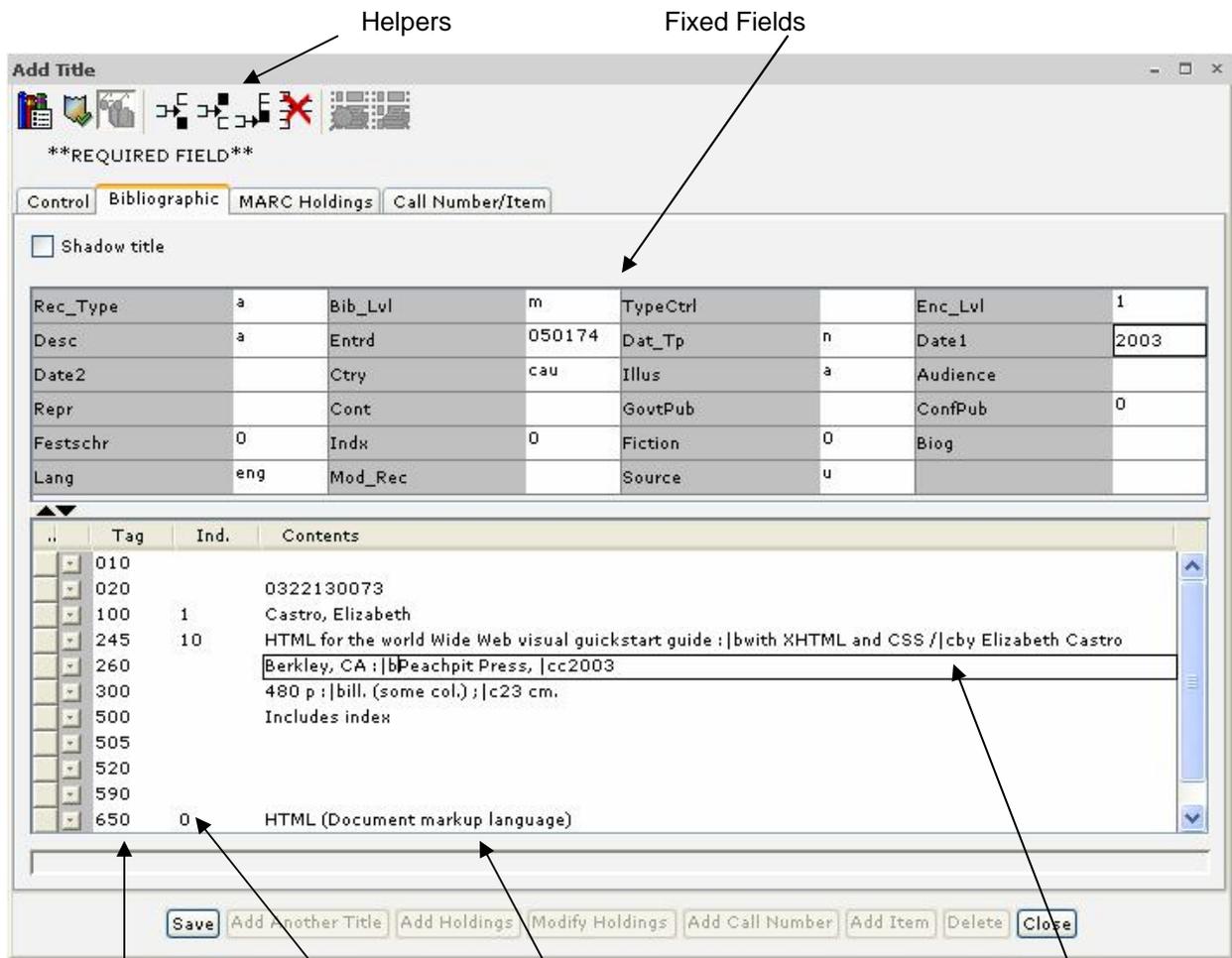
Title Default Values

The following values are available at the title level.

- **Format** – Relates to the catalogue record format, not the physical format of the material being cataloged. The format selected, in combination with the Entries Template value discussed below, determines which fixed fields and catalogue entries display on the Bibliographic tab. The MARC format is the most commonly used format for monographic materials.
 - **Entries template** – When combined with the Format value, this entry determines which fixed fields and catalogue entries display on the Bibliographic tab.
 - **TEMPLATE** – Includes many commonly used entries.
 - **FULL** – Includes a more comprehensive list of entries.
 - **BRIEF** – Provides a few fields.
 - **SELECT_ENTRIES** – Lets you create a customized list of entries rather than using one of the predetermined templates. Enter the list of tags to include in the **Entries** box as a comma-delimited list, for example, **100,245,650**.
 - **Shadow title** – Shadows a title from the online catalogue as you create it.
 - **Add item when creating title** – Automatically adds an item record to the title as soon as you create it. On occasion, you may want a title record without an item record, such as with the Workflows Acquisitions module. In those cases, you might want to clear this box.
2. Make any necessary changes to the Defaults, and click **OK**. The Bibliographic tab appears.

Bibliographic Tab

Information that displays on the Bibliographic tab, which is part of the title-level record, is common to all volumes and copies of the title, and is used primarily to describe the item(s) in question. This tab contains the data that is indexed for keyword searching and browsing. Which fields display is based on the format and template selections in the Title Default Values section on the Defaults tab (Set Properties window).



3. On the **Bibliographic** tab, enter appropriate information for the fixed fields and MARC entries. For further details, see **Appendix 1, The Record Editor**.
4. After entering fixed fields and bibliographic information, click the **Control** tab.

Control Tab

Information in the Control tab, which is part of the title-level record, is primarily used “behind the scenes” to administer and maintain the catalogue, authority, and review data files. Information in the Control tab is common to all volumes and copies associated with the title.

Basic title information

- **Title Control Number**

This serves as the **unique numeric identifier** of each title, and is used to prevent potential duplicates when loading or overlaying bibliographic records. Records created since Sirsi implementation in 2002 use either LCCN, ISBN, ISSN or the OCLC number, preceded by a lowercase **i**, **s**, or **o** respectively, as the title control number, in that preferred order (**L I S O**). If none of these is applicable, a number is system-generated, with an “a” prefix, as shown above. When you manually enter a title using the Add Title wizard, Sirsi auto-generates the title control number. You should change this to a more significant value, such as the ISBN, if available.

- **Record Format**

This is for the *catalogue record format*, not the physical format of the material being cataloged, which is coded in **Rec_Type**, the first fixed field on the Bibliographic tab. The Record Format code here on the Control tab determines which fixed fields and catalogue entries display on the Bibliographic tab. The format that Sirsi calls “MARC” is the MARC 21 “Book” format, standard for text-based monographic works. Record Format codes for non-textual monographs include MUSIC, MAP, VM, and MRDF. See Appendix ?? for more details about which Record Format codes correspond with which Rec_Type codes.

- **.Number of volumes**

The system supplied value in this field is automatically computed from the number of volumes, or call numbers, associated with the title record, and cannot be edited.

Title creation & Title modification

Created By, Date Cataloged, Date Created

Modified By, Date Modified, Previously Modified by

These self-descriptive fields are used to track the history of each record's creation and updates. The **Date Cataloged** is the only one of these fields which needs to be edited. When a record is created or imported the default is NEVER; at the point when an item is fully catalogued and on the way to the shelf, this is set to TODAY (which is translated to a date by the system). This will prevent the record from being overlaid by automated batch loads. This information is also used to identify newly-completed records in the database, for various purposes.

5. After updating the Title control number (if necessary) and setting the Date Cataloged to TODAY (if you are finishing a record), click the Call Number/Item tab.

Call Number/Item Tab

The Call Number/Item tab displays all call numbers and items associated with the title. Item information that displays on this tab is specific to a single volume and/or copy of the title.

Three levels of information are available on this tab, displayed graphically in a "tree":



Detailed title-level information appears on the Bibliographic tab described previously. On this tab, the title simply acts as a placeholder.



When you select the call number level information, detailed call number information displays in the right pane.

The screenshot shows the "Add Title" dialog box with the "Call Number/Item" tab selected. The left pane shows the tree view with "QA76.76 .H94 C3698 2003 - ARROWOOD" selected. The right pane, titled "Call number information", contains the following fields:

- Call number: QA76.76 .H94 C3698 2003
- Class scheme: LC
- Call library: ARROWOOD
- Shadow call number

At the bottom of the dialog are buttons: Save, Add Another Title, Add Holdings, Modify Holdings, Add Call Number, Add Item, Delete, and Close.

- **Call number** – When importing records through SmartPORT this value may be derived automatically from a call number field in the bibliographic record. For creating original records you can configure Add Title properties to generate a dummy call number which you can subsequently update.
- **Class scheme** – Select a value from the list. Workflows does not check to see if the call number is in the correct format for this particular class scheme.
- **Call Library** – This represents the owning library for this call number. Each library must have its own call number record, even if the call number values are identical.
- **Shadow call number** – If you click this box, Workflows hides this call number in the OPAC. Note that if you shadow the last call number of a title, Workflows automatically shadows the title from the OPAC.

Note: multi-volume works require the call number to be repeated for each volume with the respective volume designations appended in subfield |z.



When you select the item level information in the tree, the pane to the right displays Call Number fields, Item fields, and Extended Information fields.

Note: In cataloguing wizards that allow call numbers and items to be added or modified, Call Number fields can be changed and saved together with Item field changes; however, item and call number Library fields cannot be changed simultaneously.

TIP! When making a Library field change, modify either the Call Library or the Item Library (not both). When the record is saved, the other library field will automatically be updated.

You can link each call number to one or more item records. Each item record represents one physical copy or barcode in the collection.

- Workflows requires a unique **Item ID** to save an item record.

Note: For material that will not receive an actual barcode, you can auto-generate a dummy Item ID, such as 94485-1001. To auto-generate an item ID, type AUTO in this field if this property has not already been set on your workstation.

- The item **Type** and **Home location** fields display the default values previously selected on the Set Properties page. You can change these values to reflect the material in hand, if necessary.

Note: Current location of an item is determined by its home location. As circulation activities occur with an item, its current location changes, for example to CHECKEDOUT or HOLDS. You should not directly edit information in the Current location field.

- **Item category 1** is an optional statistical reference field. Your library may or may not have chosen to use this field.
- **Item category 2** is not used by U of T.
- **Media desk** is an element of the Workflows Materials Booking module. This field is optional unless you are booking this item.
- Setting the **number of pieces** field to a value other than 1 has an impact at the circulation desk. When checking an item in or out, circulation staff will be asked to confirm with an override that all elements of a multipart set are in place.
- **Permanent** indicates whether the item is part of your library's permanent collection. **Circulate** allows items that would normally not circulate, by system-generated circulation rules, to be charged with an override.

- *Extended info*

In the **Extended info** section, you can enter notes about this particular item. You can view all three types of notes in the item level record in WorkFlows. PUBLIC Notes are also visible to patrons when viewing the record in the OPAC.

Properties can be configured to allow information entered in the CIRCNOTE field to display when the item is either checked out with the Checkout Wizard or discharged with the Discharge wizard.

If there is no item associated with the call number, only call number information will display in the Call Number/Item tab.

-
6. On the Call Number/Item tab, type the call number information. Use the List Catalog By Call Number helper (top left) for looking up nearby call numbers for shelf-listing.
 7. On the “tree,” click the item. In the **Item Information** and **Extended Information** sections, enter appropriate information. You must supply a barcode or other **Item ID** in order to save the record. If you set defaults for this window using the Properties associated with the Add Title wizard, these fields should populate automatically.
 8. After modifying all tabs, click **Save**.

Modify Title Wizard

Use the Modify Title wizard to make changes to material already in the catalogue. This is the only maintenance wizard that gives you access to bibliographic and title control information as well as all call numbers and items attached to a record.

To edit an existing title

1. On the Title Maintenance toolbar, click the **Modify Title** wizard.  (Shortcut: **Alt-F2**). The Modify Title search window appears:



2. Enter the title (or other search term) for which you want to add items, and click **Search**.
3. If the search results in a hit list of titles, select the title from the list, and click **Modify**. You can also click the **Current** title, if available. The Bibliographic tab of the title appears.
4. Modify the entries as needed. Use the helpers to insert fields, as needed. You can also use the Record Editor to modify the fixed fields, indicators, and subfields. For more information, see the Record Editor section, Appendix A.
5. To modify the information pertaining to the administration and maintenance of the title record, click the **Control** tab.
6. To modify call number and item-level information, click the **Call Number/Item** tab.
7. Once you've finished making changes, click **Save** to retain the information, then **Close** to move to another wizard.

Duplicate Existing Title Wizard

Use the Duplicate Title wizard to create a new title record by copying the bibliographic data of an existing title, as well as associated call number and item records. Records for new items that are similar to materials already in the catalogue, such as a new edition, reprint, or item in a series, can be duplicated to minimize the amount of data entry required of the cataloger.

To duplicate an existing title

1. On the Title Maintenance toolbar, click the **Duplicate Title** wizard.  (Shortcut: **Shift-F3**). The search window appears as described previously.
2. Search for the title to duplicate. The search may return a list of titles.
3. Select the title from the list, and click **Duplicate**. Bibliographic information for existing title appears. (Or, if a Current Title appears, and this is the title you want to duplicate, click the title. You don't need to click Duplicate.)
4. On the **Bibliographic** tab, modify the fields to reflect the new title's bibliographic information. Use the helpers to insert fields, as needed. You can also use the Record Editor to modify the fixed fields, indicators, and subfields. For more information, see the Record Editor section in Appendix A.

Note: Be sure to remove or modify *all* control numbers such as LCCNs (010 field) and ISBNs (020 field) which apply only to the original record!

5. On the **Call Number/Item** tab, modify information as needed. You must supply a barcode or other **Item ID** to identify the item.
6. Click the **Control** tab to modify the information pertaining to the administration and maintenance of the title.
7. Click **Save** to retain the new information.

Delete Title, Call Numbers or Items Wizard

Use the Delete Title, Call Numbers or Items wizard to remove a Title, Call Number, or Item record from the catalogue. Once you use this wizard, the catalogue record no longer exists in the database.

You can suppress titles (items) from view in the public catalogue by moving them to a shadowed location such as DISCARD or MISSING, instead of deleting the Title.

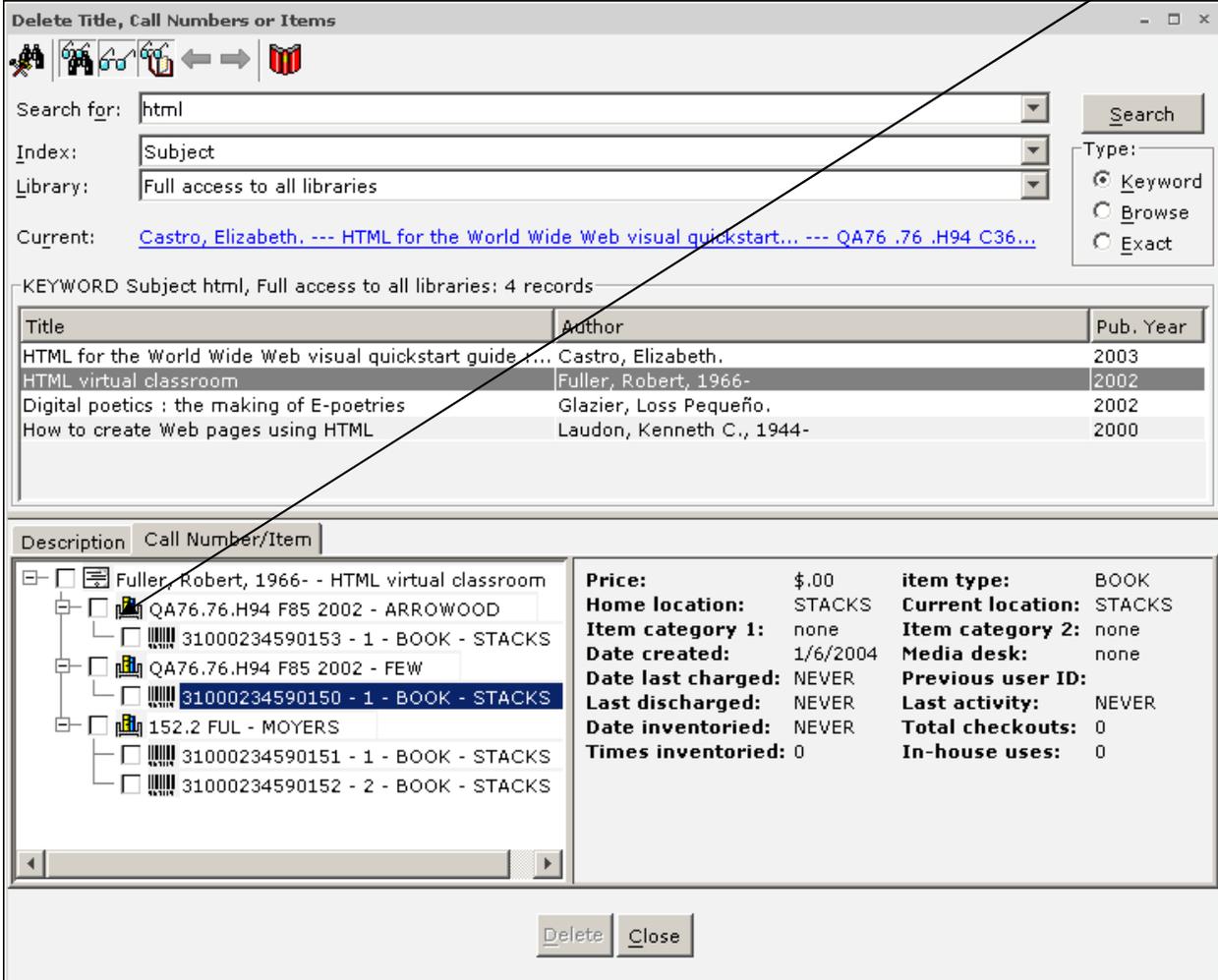
You cannot remove items with charges, holds, or bills.

To remove an item from the database

1. On the Title Maintenance toolbar, click the **Delete Title, Call Numbers or Items** wizard.

(Shortcut: **F11**).  The search window appears.

2. Type the search terms in the **Search for** box, and click **Search**. The following window appears (notice the check boxes next to the title and all call number and item records):



The screenshot shows the 'Delete Title, Call Numbers or Items' wizard window. The search criteria are: Search for: html, Index: Subject, Library: Full access to all libraries. The current record is: Castro, Elizabeth. --- HTML for the World Wide Web visual quickstart... --- QA76 .76 .H94 C36... The search results table shows 4 records:

Title	Author	Pub. Year
HTML for the World Wide Web visual quickstart guide, ...	Castro, Elizabeth.	2003
HTML virtual classroom	Fuller, Robert, 1966-	2002
Digital poetics : the making of E-poetries	Glazier, Loss Pequeño.	2002
How to create Web pages using HTML	Laudon, Kenneth C., 1944-	2000

The detailed view shows the following information for the selected item:

<input type="checkbox"/> Fuller, Robert, 1966- - HTML virtual classroom	Price: \$.00	item type: BOOK
<input type="checkbox"/> QA76.76.H94 F85 2002 - ARROWOOD	Home location: STACKS	Current location: STACKS
<input type="checkbox"/> 31000234590153 - 1 - BOOK - STACKS	Item category 1: none	Item category 2: none
<input type="checkbox"/> QA76.76.H94 F85 2002 - FEW	Date created: 1/6/2004	Media desk: none
<input type="checkbox"/> 31000234590150 - 1 - BOOK - STACKS	Date last charged: NEVER	Previous user ID:
<input type="checkbox"/> 152.2 FUL - MOYERS	Last discharged: NEVER	Last activity: NEVER
<input type="checkbox"/> 31000234590151 - 1 - BOOK - STACKS	Date inventoried: NEVER	Total checkouts: 0
<input type="checkbox"/> 31000234590152 - 2 - BOOK - STACKS	Times inventoried: 0	In-house uses: 0

Buttons: Delete, Close

3. To delete the title and all of its call numbers and items, select the check box next to the title you want to delete. To delete a call number and its associated items, select the check box next to the call number record you want to delete. You can also delete an individual item by selecting the check box next to the item you want to delete.

You cannot delete a call number or item record if any of the following conditions apply:

- A call number/item that has holds or is on reserve cannot be deleted.
 - Any item that is charged, has unpaid bills, is booked, or is the last call number under serials control for a particular library can be selected, but cannot be removed until it has been discharged, the bill is paid, or the booking or serial control record is removed.
 - If an open order exists for the title, the items associated with the call number used when creating the order cannot be removed.
 - If your system is configured to save charge histories and the Delete Items with a Charge History behavior is not selected, an item with history charges cannot be removed.
4. After making your selections, click **Delete**.

Note: If you selected call numbers or copies that are not eligible for removal, these will display in an exception list indicating why the items could not be removed.

5. If you remove the last copy or volume attached to a title, and if the Properties associated with this wizard have been set to allow it, then this will remove the title as well. In such a case, a confirmation window appears.

Special Cataloguing Functions

Bound-Withs Wizard

The **Bound-With** wizard is used to link database records for separately-published titles that have been bound together after publication. Each title has a separate bibliographic record, but of necessity only the first can have its own call number and barcode. The second and subsequent titles do not have real call numbers and have no copy records. Instead, these bib records are linked via a call number *with zero copies* to the call number and copy record for the first title. (These zero-copy call numbers do not show in the catalogue). Sirsi uses the terms “Parent” and “Child” to describe the relationship between the titles: the *Parent* is the bib and vol/copy record for the first title; a *Child* is any one of the subsequent titles which must share the call number record and barcode record of the first title.

Restrictions

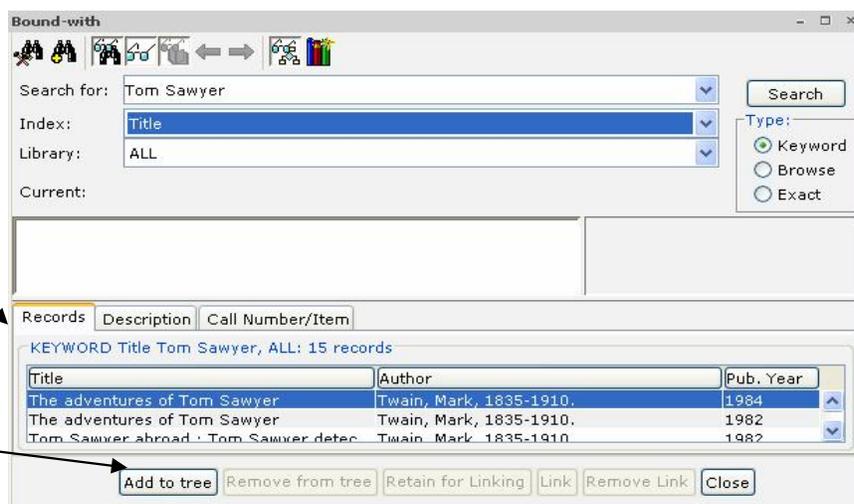
When using the Bound-Withs feature to link bibliographic descriptions for items bound together, the following restrictions apply:

- A call number with items attached cannot be linked to another call number with items attached.
- Multiple title records may be bound together, but only one may have an item record attached.
- Linked call numbers must be cataloged in the same library.

To link multiple title records to a single item record

1. On the Special toolbar, click the **Bound-withs** wizard.  (Shortcut: **Alt-F3**) The Bound-Withs search window appears.

2. Type the search terms for the first of the records you wish to link in the **Search for** box, and click **Search**. Results appear in the following window:



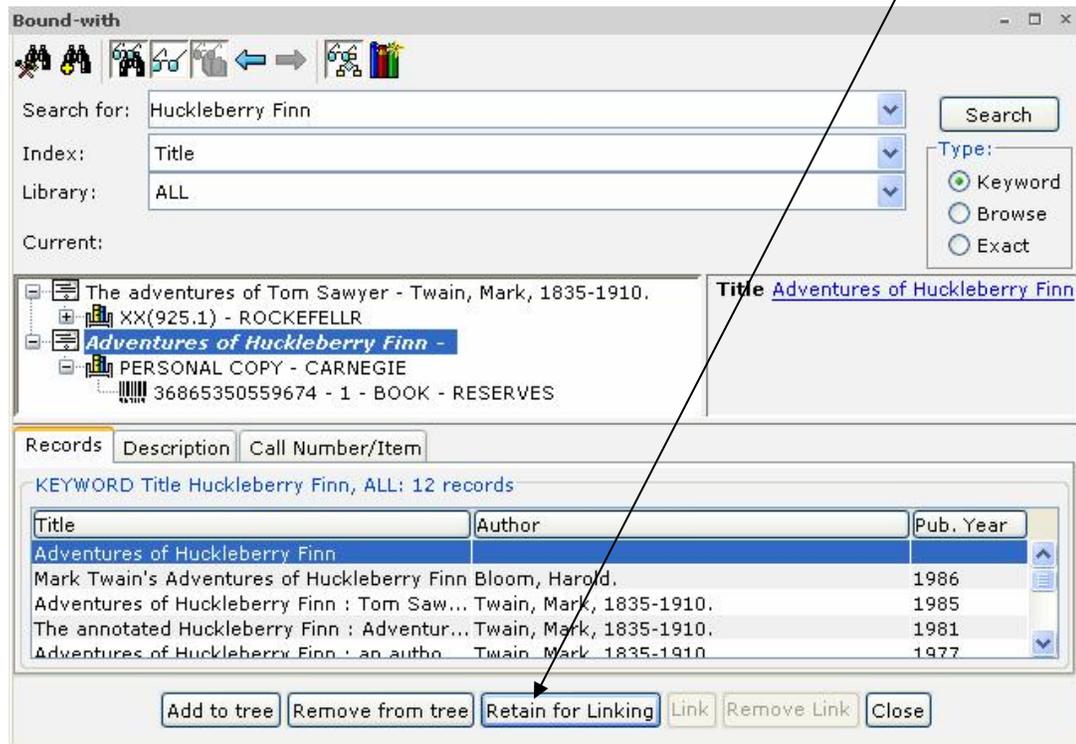
Title	Author	Pub. Year
The adventures of Tom Sawyer	Twain, Mark, 1835-1910.	1984
The adventures of Tom Sawyer	Twain, Mark, 1835-1910.	1982
Tom Sawyer abroad : Tom Sawyer deter	Twain, Mark, 1835-1910	1982

3. Select the title to be bound, and click **Add to tree**.

4. Type the search terms for the next record in the **Search for** box, and click **Search**.

5. Select the second title and once again click **Add to tree**. Repeat steps 4 and 5 as necessary.

6. Click the title in the tree with no copy attached (the “child” record) and click **Retain for Linking**.



7. Click the copy record of the other title, and click **Link**. A confirmation window appears:



8. Click **OK**, then **Close** to exit the wizard.

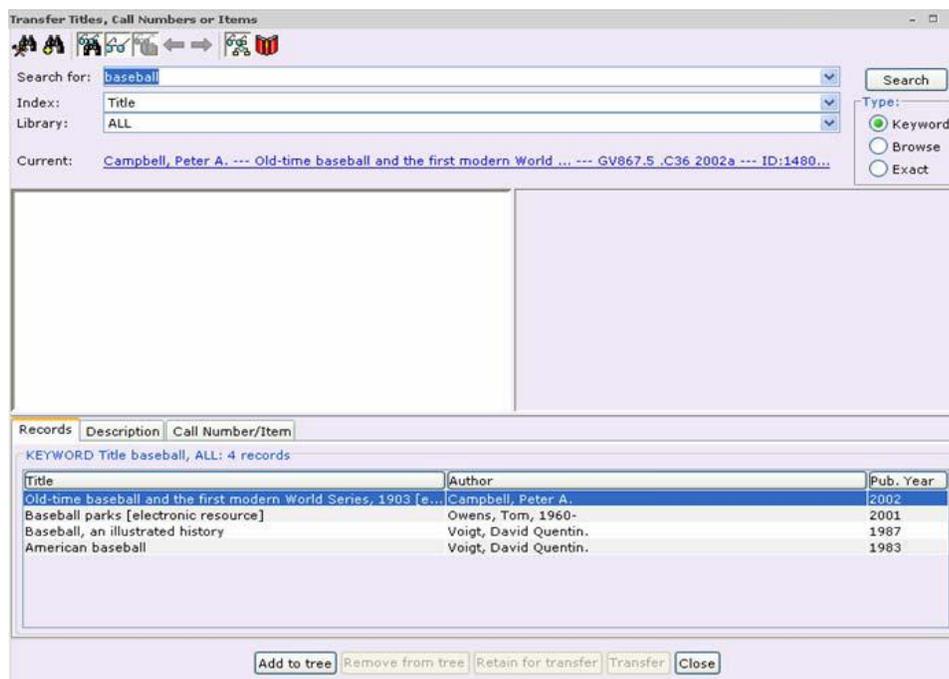
Transfers Wizard

Use the Transfers wizard to transfer item or call number records to other existing call number or title records. This wizard was designed to conduct searches to collect records, mark them for transfer, and send them to the destination record. The wizard can perform the following functions:

- Transfer an item to an existing call number.
- Transfer a call number and all of its associated items to a different existing catalogue record.
- Transfer all call numbers from one catalogue record to a different catalogue record.

To transfer an item to an existing call number

1. On the Special toolbar, click the **Transfers** wizard.  The Transfer Item search window appears.
2. Type the search terms in the **Search For** box, and click **Search**. The following window



Transfer Titles, Call Numbers or Items

Search for: Search

Index: Type: Keyword Browse Exact

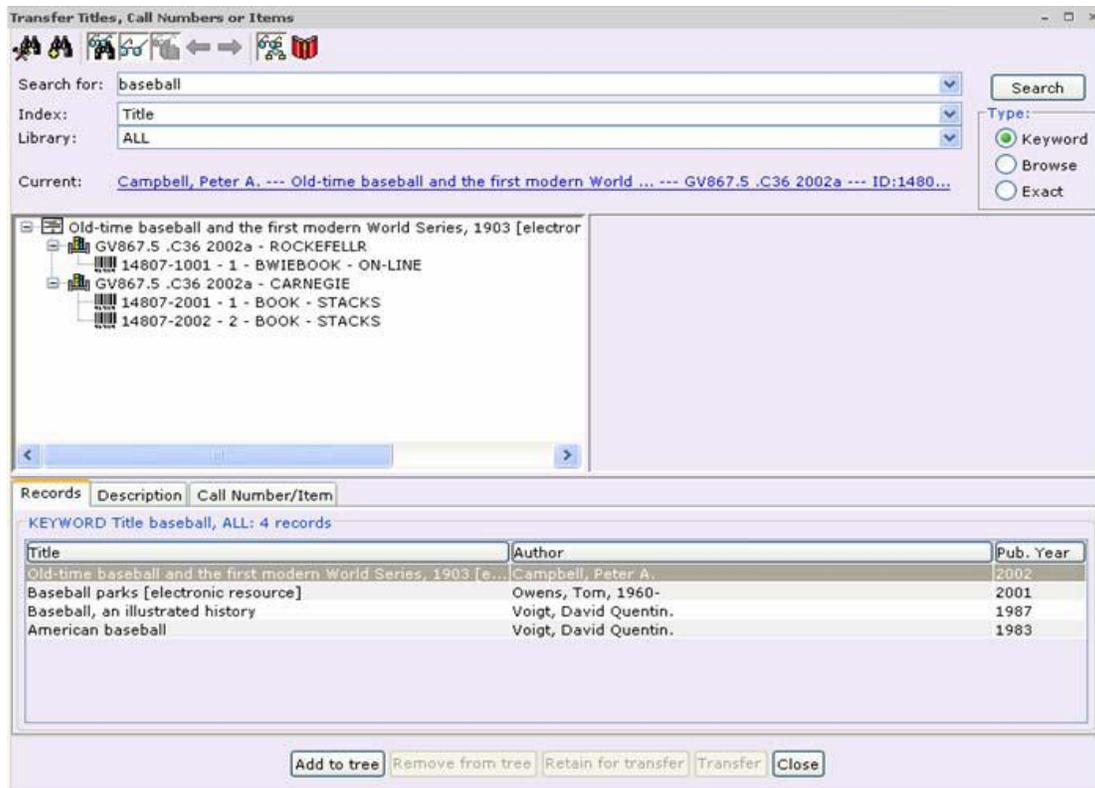
Library:

Current: [Campbell, Peter A. --- Old-time baseball and the first modern World ... --- GV867.5 .C36 2002a --- ID:1480...](#)

Title	Author	Pub. Year
Old-time baseball and the first modern World Series, 1903 [e...]	Campbell, Peter A.	2002
Baseball parks [electronic resource]	Owens, Tom, 1960-	2001
Baseball, an illustrated history	Voigt, David Quentin.	1987
American baseball	Voigt, David Quentin.	1983

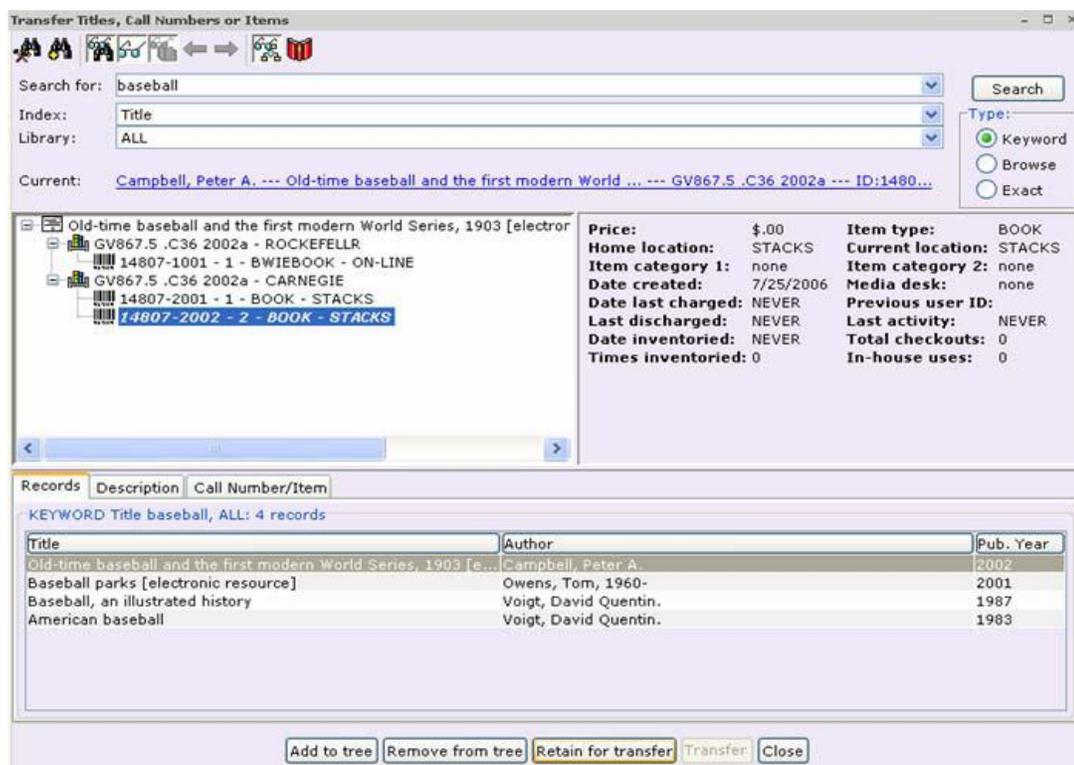
appears:

3. Select the title from the list, and click **Add to Tree**. Expand the title to see the call number and copy information.

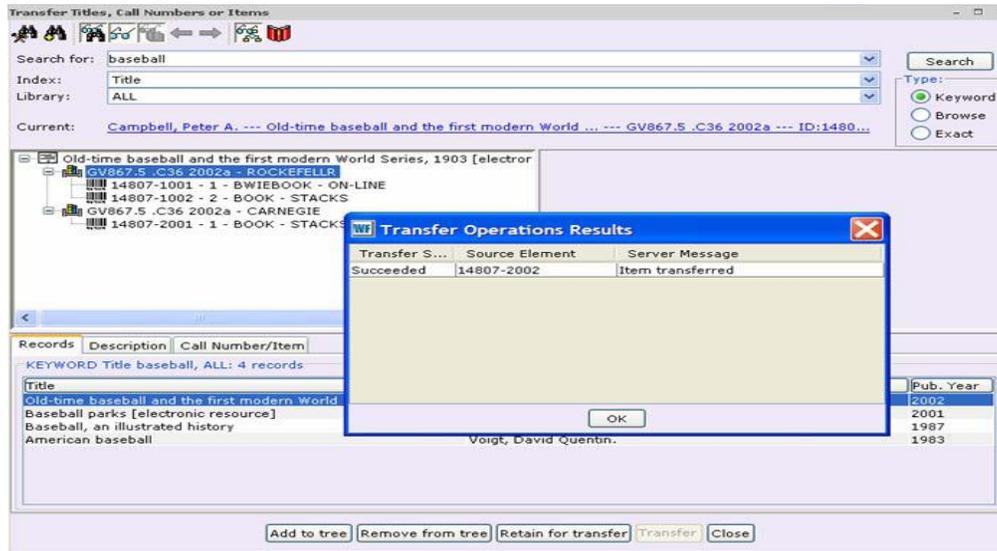


- In the Transfer tree pane, select the record to be transferred, and click **Retain for Transfer**.

Note: You may also right-click the item and select from the menu options.

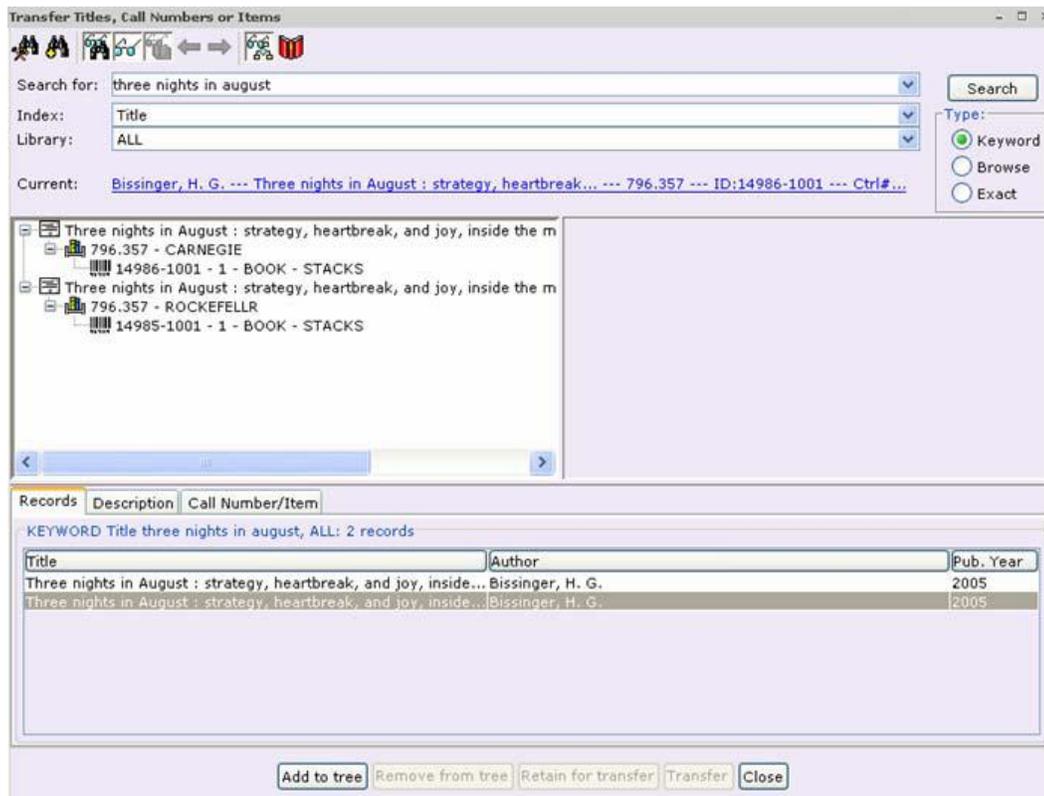


- Select the record to which it should be transferred, and click **Transfer**. A confirmation window appears: click **OK**, then **Close**, to exit the wizard.

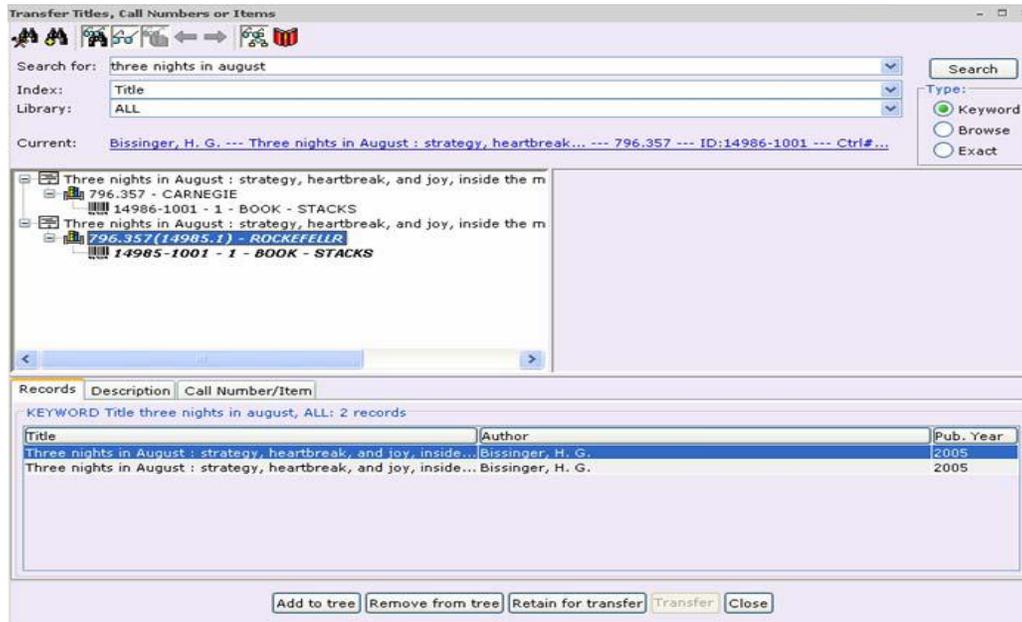


To Transfer a call number from one catalogue record to a different record.

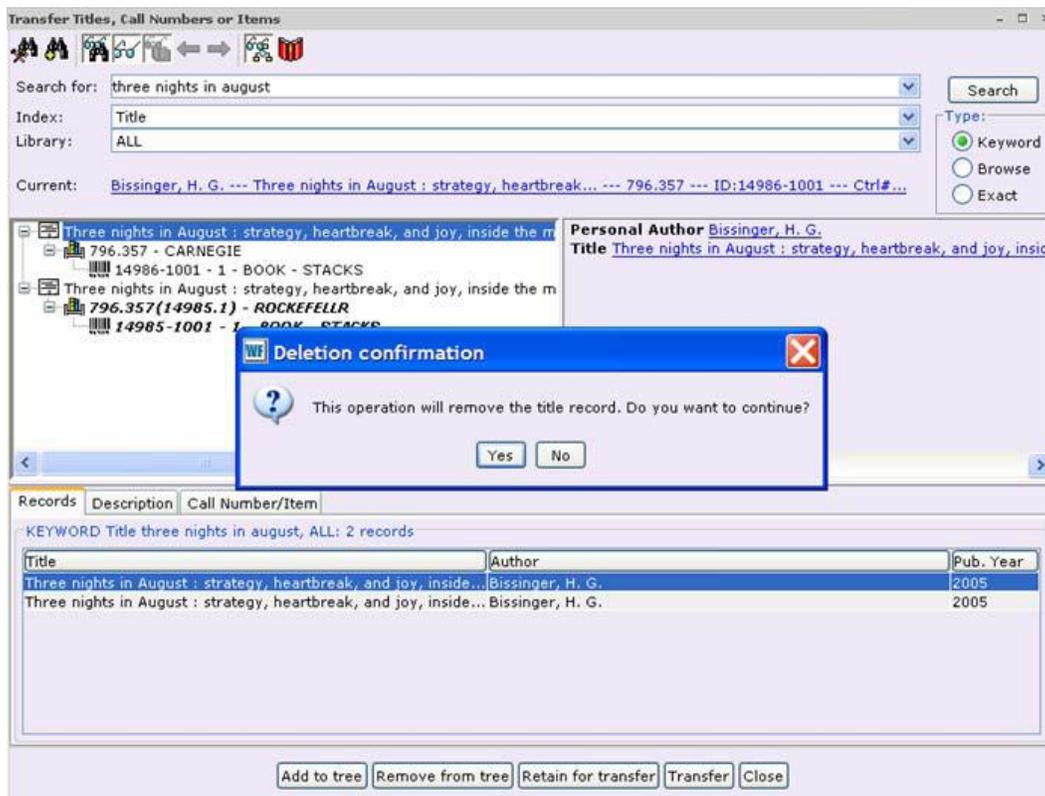
- On the Special toolbar, click the **Transfers** wizard.  The Transfer Item search window appears.
- Search for, then select, the titles (the “original” title and the “wrong” or “duplicate” title) from the list and click **Add to tree**. Expand titles to see attached call numbers and items.



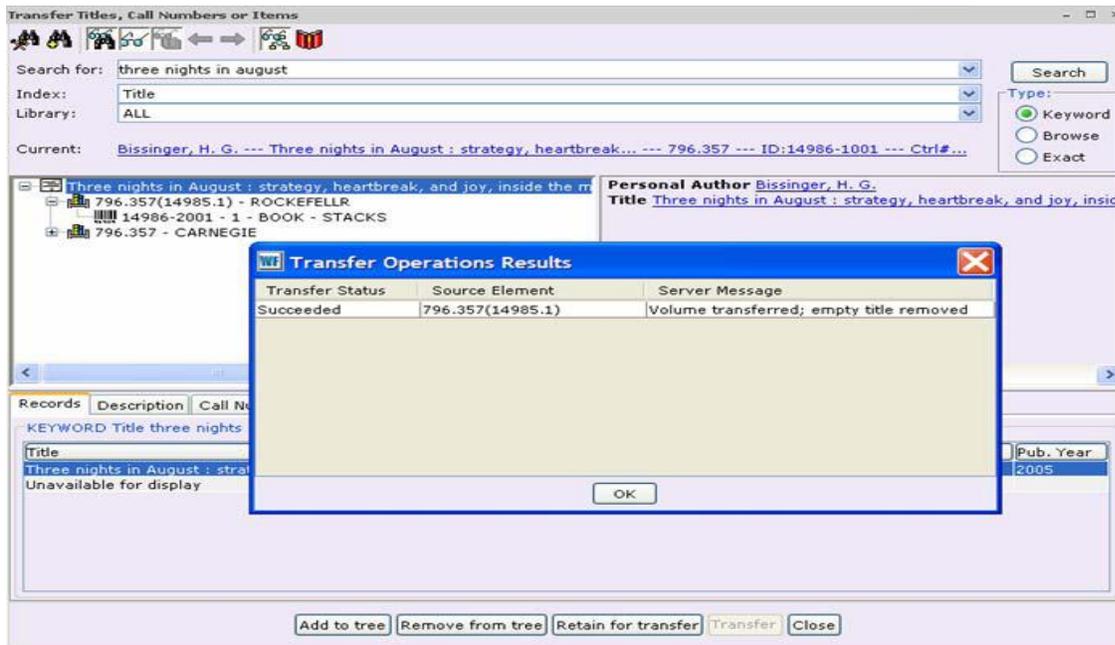
3. Select the call number attached to the “wrong” or “duplicate” title and click Retain for Transfer.



4. Select the title to which it should be transferred to and click Transfer.
5. If the Properties on your workstation are configured so that you can delete Titles, the empty title will be removed if you transferred its last call number to another title. If not, then you cannot transfer and thus remove the last call number from a title.



6. A confirmation window appears. Click **OK**, then **Close** to exit the wizard.



Updating Information Links for Transferred Items and Modified Call Number Libraries

When objects are transferred or the Library field of a call number is modified, the following links are always maintained:

- Bills
- Charges
- Outreach histories
- Requests

Transferring Items with Holds

Existing copy-level holds in a copy transfer are maintained. However, **a copy with an available hold** cannot be transferred, nor can a call number or title be transferred or the Library modified if any attached copy has an available hold.

There are some other scenarios when circulation status can prevent an item from being transferred. A copy transfer that would result in the removal of the copy's current call number is not allowed if the call number has a copy-level hold. A copy or call number transfer or modification of the Library that would result in the removal of the current catalogue record is not allowed if the catalogue has a title-level hold.

Transferring Items with Orders

When the Workflows Acquisitions module is in use, order lines associated with call numbers are maintained in call- and title-level transfers.

A copy transfer that would result in the removal of the copy's current call number is not allowed if the call number is linked to an order line item.

Other Restrictions to Transfer Item or Modified Library Links

- **Academic Reserves** – Copies and call numbers with links to reserves cannot be transferred or the Library modified.
- **Bound-With** – Call numbers that have bound-with links cannot be transferred or the Library modified. Copies cannot be transferred to call numbers that have bound-with links. Copies cannot be transferred from call numbers that have bound-with links.
- **Review records** – Transfers cannot be made to or from titles that have been loaded for review or are locked because they are being updated.
- **Accountability** – Transfers cannot be made to or from titles under accountability.
- **Serials Control** – A transfer resulting in the removal of the catalogue record or the last call number belonging to a library that has the title under serial control cannot be transferred or modified. A title that is linked to a serial control record cannot be transferred.
- **Materials Booking** – A copy that is linked to a booking calendar cannot be transferred or the call number Library modified.

Capturing and Loading Records with SmartPORT

Overview

SmartPort is a Z39.50 client that allows dynamic capturing and loading of MARC bibliographic and authority records from a Z39.50 server directly into the library's catalogue. You can:

- Search other databases such as LC, NLC, New York University, Oxford, Yale, etc.
- Capture a new record, then edit and load it into Sirsi
- Overlay an existing brief order record currently displayed in Workflows with a complete MARC record.
- Capture a bibliographic record for acquisitions
- Capture a new authority record from the LCAUTH or CANAUTH databases
- Overlay an existing authority record with a new record from LCAUTH

Note: Details for setting various options and default values are given in **Appendix 2, Configuring SmartPORT**.

Connecting to a Z39.50 Server

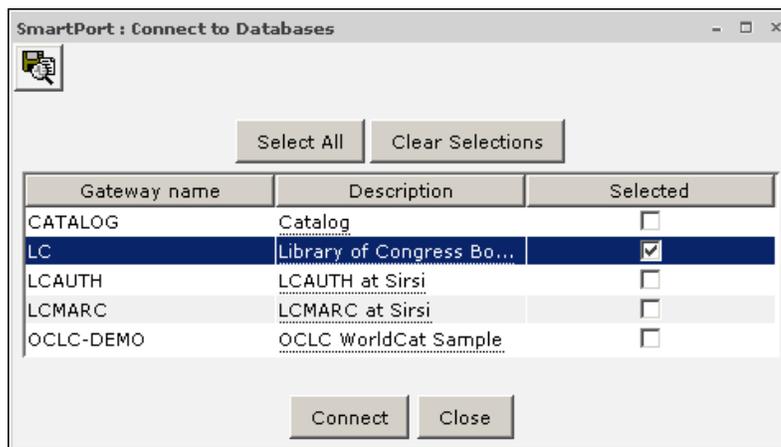
1. On the Common Tasks toolbar, click the **SmartPort** wizard.  (Shortcut: **F5**). A window appears listing all the Z39.50 target servers currently available for the University of Toronto.

2. Highlight the server you want to search, and click **Connect**. The SmartPort Search window appears.

3. You can save time by searching several targets at once. Use the **Add/Remove Destinations**



helper to connect to additional Z39.50 servers on the list. This helper also allows you to disconnect from a server without closing SmartPORT.



Tip: Avoid connecting to LCAUTH at the same time as bibliographic databases. To obtain useful results, bibliographic record and authority record searches need to be done separately.

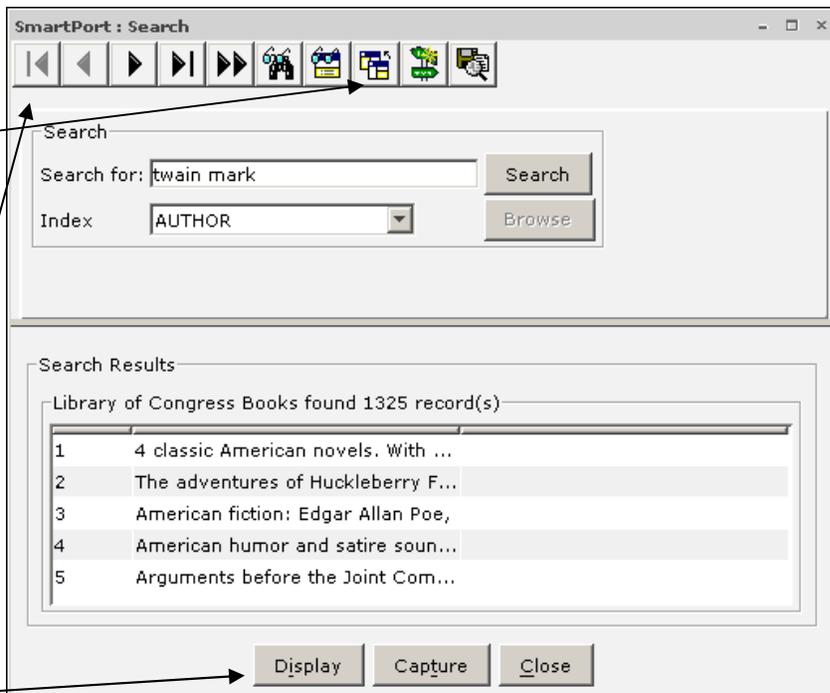
Searching for records

1. Type your search terms in the SmartPORT Search **Search for** box, select the appropriate **Index**, and click **Search**. Any matching records appear in the Search Results pane.

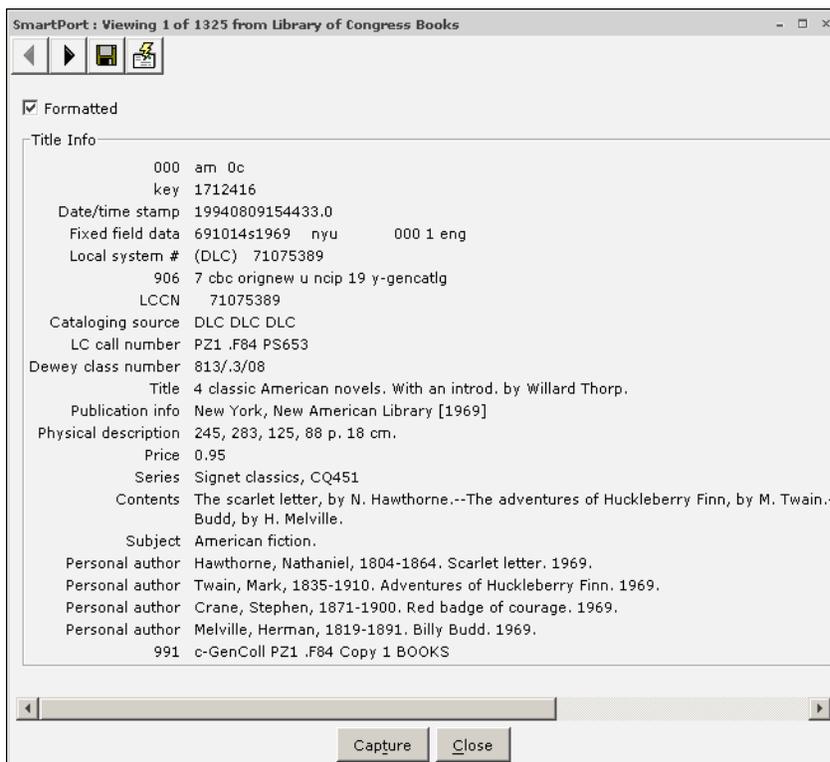
2. Use the **Change Search Pane View** helper to toggle between the Single Field Search and the Labeled Field Search. (The latter lets you do combined Author-Title searches).

3. Use the helpers on the top left toolbar to move forward and backward through long lists.

4. To view a record, highlight the title, and click **Display**.



5. Review the record. Use the scroll bar to view additional lines of the record. To view another record, use the helpers to move through the list one record at a time. Click **Close** to return to the Search window.



Capturing records

1. When you find a record to add to your library's catalogue, click **Capture** in either the Search Results or Viewing window. The **Verify options** window appears:

2. This contains the default settings you have previously set using the SmartPORT configuration (for details see Appendix 2). Make any necessary changes. Only select the **Replace current record** option if you want to *overlay* the record that was most recently displayed, and selected in WorkFlows. (This will overwrite whatever is in the Bibliographic and Control tabs of the record being replaced, but any call numbers, items, and holdings will be retained.)



The **Match and load** option uses the specified match points to determine whether any existing record in the local catalogue matches the one being captured. This is the normal setting whenever you are importing new records.

Note If Match and load detects an existing record with a matching title control number, a message will open indicating a matching record was found and on which title control number entry the match was



made. Click **OK** to close the message, and the incoming record is displayed. *Immediately click Close to cancel the overlay unless you are sure you want to completely replace the existing record!* Then use the Workflows **Item Search and Display** wizard to look up this title control number to see if the existing item really is the same as the one you are loading. If it is, but you want to update it, repeat the Capture, and this time continue despite the warning. SmartPORT will automatically replace the older record with the incoming one, just as if you had selected the Replace Current Record option, rather than Match and Load. (See p. 38 for instructions on preventing the replacement of existing records when the title control number match is a false one.)

3. After making changes or accepting defaults, click **OK**. The Capture window appears:

SmartPort : Capture

Control Bibliographic MARC Holdings Call Number/Item

Shadow title

Rec_Type	a	Bib_Lvl	m	TypeCtrl		Enc_Lvl	
Desc		Entrd	691014	Dat_Tp	s	Date1	1969
Date2		Ctry	nyu	Illus		Audience	
Repr		Cont		GovtPub		ConfPub	0
Festschr	0	Indx	0	Fiction	1	Biog	
Lang	eng	Mod_Rec		Source			

Label	Tag	Ind.	Contents
key	001		1712416
Date/time stamp	005		19940809154433.0
LCCN	010		71075389
Cataloging source	040		DLC cDLC dDLC
LC Call Number [Rep.]	050	00	PZ1 b.F84 aPS653
Dewey class number [Rep.]	082	00	813/.3/08
Title	245	00	4 classic American novels. cWith an introd. by Willard Thorp.
Publication info [Rep.]	260		New York, bNew American Library c[1969]
Physical descrip [Rep.]	300		245, 283, 125, 88 p. c18 cm.
Price [Obs.]	350		0.95
Series [Rep.]	490	0	Signet classics, CQ451
Contents [Rep.]	505	0	The scarlet letter, by N. Hawthorne.--The adventures

Save Add Holdings Modify Holdings Close

The incoming record has not yet been added to the catalogue. You can edit the record as needed at this point, but none of your changes will be permanent until you save the record.

4. Click **Save** to save the record and add it to the catalogue. Keep in mind that any record loaded from SmartPort consists entirely of the title and call number-level records. Copies must always be added using the **Call Number and Item Maintenance, Add Items, or Add Ordered Items** wizards.
5. Click **Close** to close the window and return to the SmartPort Search window.
6. Click **Clear** to clear the previous hitlist and search terms, to continue searching for other titles. Click **Close** to close the SmartPort wizard. This closes all Z39.50 connections.

Capturing Authority Records

Authority Records are searched and captured in exactly the same way as described above for bibliographic records. You have the same choice either to “**Match and Load**” or “**Replace**“. Simply ensure that you are connected only to the LCAUTH or CANAUTH servers.

Loading Saved Records using SmartPORT

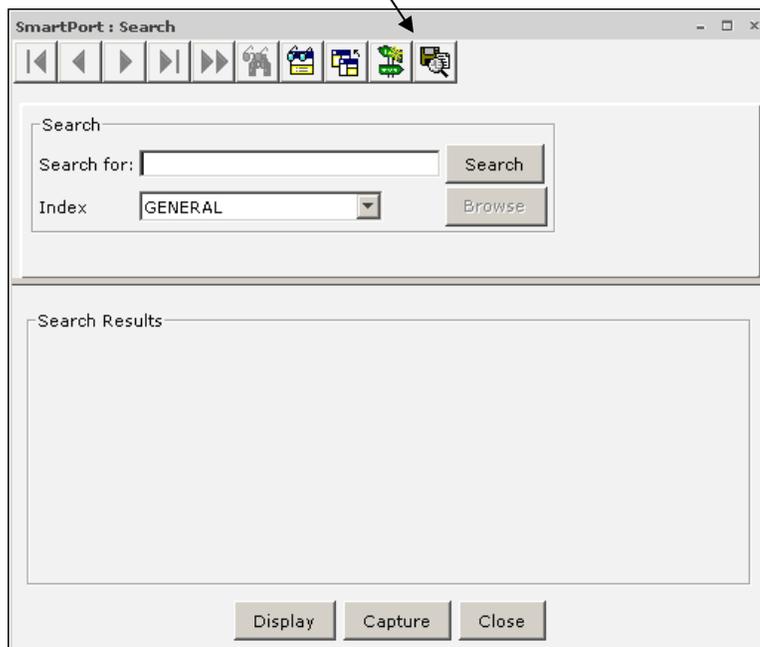
The **Saved files** button allows batches of records which have been searched elsewhere and saved to disk to be loaded one by one into the U of T Sirsi database through SmartPORT. This can be useful in cases where you don’t wish to batch load files of MARC records, but want to be able to select and load particular single records, one at a time.

To select and import saved records

1. On the SmartPORT search window, click on the **Saved Files** helper. A list appears showing all your saved files containing MARC records.

2. Select from the list the file which contains the record(s) you want to load, and click the **View** helper. 

3. The individual records within the saved file are listed in just the same way as results from a SmartPORT search. You can move back and forth through the list, open individual records, and capture them for loading or overlaying just as you would with records retrieved through searching



To remove a saved file

1. Select a file from the list to remove, and click the **Remove** helper.  A confirmation window appears.
2. Click **Yes** to remove the file, or click **No** to cancel and return to the Saved files window.

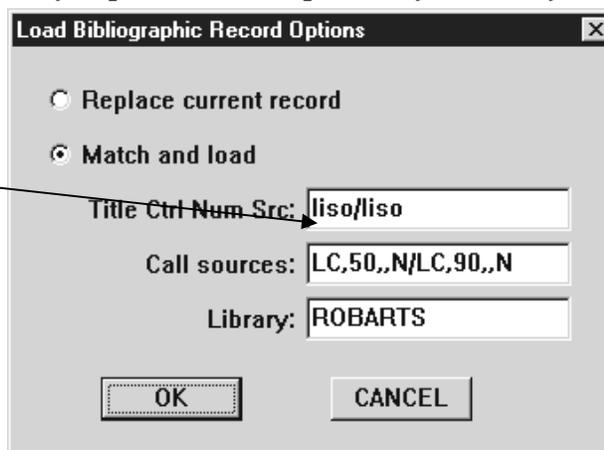
Avoiding False Matches and Overlays

Sirsi depends on the Title Control Number to detect duplicate bibliographic records. Whenever an incoming record contains an LCCN, ISBN, ISSN, or OCLC number that matches an existing Title Control Number, SmartPORT warns you that the new record is a duplicate. You have a choice of cancelling your import, or, if you proceed, of *replacing* the existing record with your new one.

Problems arise because these numbers are not foolproof, particularly ISBNs. Sirsi assumes that ISBNs are unique identifiers, but publishers occasionally assign the same ISBN to different editions or titles, by accident or design. This leads SmartPORT to report matches when in fact the items are not the same.

Whenever SmartPORT warns you that a match has been found on your incoming ISBN, it is safest to click the **Close** button rather than **Save**, thus aborting the capture. Then do a Title Control # search in Workflows to see if the existing item really is the same as the one you are loading. If it is then there is generally no need to bring in the new record; add your holdings to the existing one. If you want to update the old record for some reason, repeat the Capture, and this time click **Save** despite the warning. SmartPORT will automatically replace the older record with the incoming one, just as if you had selected the Replace Current Record option, rather than Match and Load.

However: if the existing record is in fact a *different* title or edition, and you want to add your incoming item as a new record, you cannot merely repeat the Capture and ignore the warning. ***If you do, the existing record will be completely wiped out and replaced by the one you are importing.*** Therefore, you must prevent SmartPORT from matching on your ISBN in the first place. To do this, after clicking the **Capture** button, simply delete the letter **i** from the **liso/liso** string in the Load Record Options box, instead of accepting the defaults. In this way you can suppress the false match for this particular record without affecting the normal settings. Since no match will be detected, SmartPORT will simply add your record to the database rather than overlaying an existing one.



The screenshot shows a dialog box titled "Load Bibliographic Record Options". It has two radio buttons: "Replace current record" (unselected) and "Match and load" (selected). Below the radio buttons are three text input fields: "Title Ctrl Num Src" with the value "liso/liso", "Call sources" with the value "LC,50,,N/LC,90,,N", and "Library" with the value "ROBARTS". At the bottom are two buttons: "OK" and "CANCEL". An arrow points from the text "delete the letter i from the liso/liso string" to the "liso/liso" text in the "Title Ctrl Num Src" field.

Authority Maintenance toolbar

Overview

Authority control is the method by which a library can standardize headings used in the bibliographic description of items in the catalogue. Headings in authority records can also be used to generate cross-references that aid users in searching the online catalogue.

As implemented in SirsiDynix Symphony 3.2, authority control has two main functions:

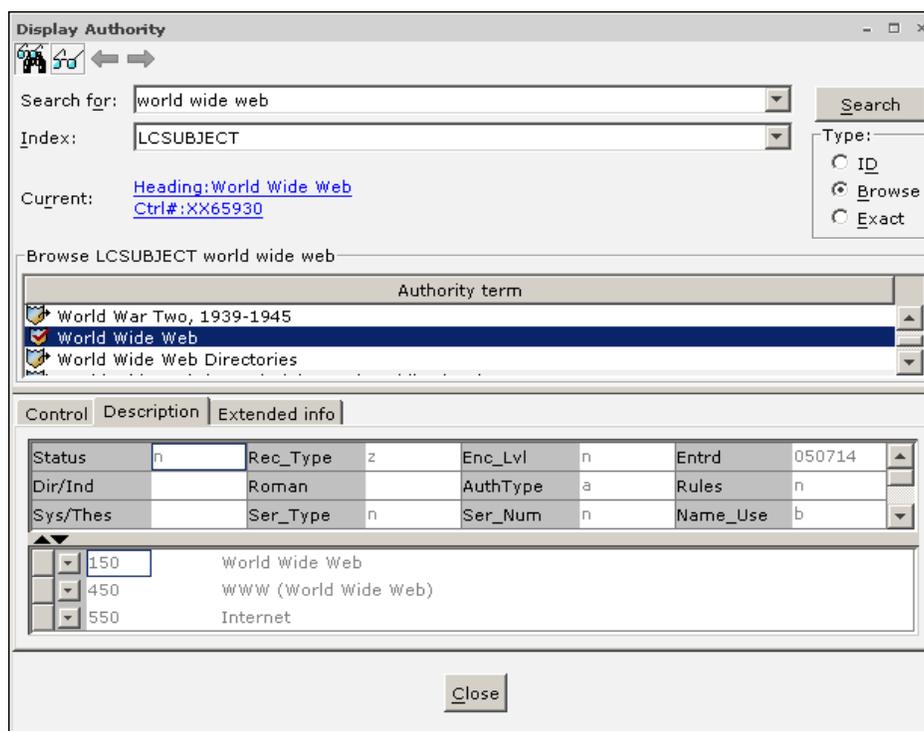
- Creation of cross-references in the public catalogue
- Verification of bibliographic headings against authority indexes

Display Authority Wizard

The Display Authority wizard lets you look up and display an authority record and any cross references attached to that authorized term.

To display an existing authority record

1. On the Authority Maintenance toolbar, click the **Display Authority** wizard.  (Shortcut: **Alt-F5**). The Display Authority search window appears.
2. Enter your search terms in the Search for box, select the appropriate index (e.g. LCSUBJECT) and click **Search**. A browse list of the closest matching authority index headings appears:



Search for: world wide web

Index: LCSUBJECT

Current: [Heading:World Wide Web](#)
[Ctrl#:XX65930](#)

Type:
 ID
 Browse
 Exact

Browse LCSUBJECT world wide web

Authority term	
World War Two, 1939-1945	
World Wide Web	
World Wide Web Directories	

Control	Description	Extended info
Status	n	Rec_Type z Enc_Lvl n Entrd 050714
Dir/Ind		Roman AuthType a Rules n
Sys/Thes		Ser_Type n Ser_Num n Name_Use b

150	World Wide Web
450	WWW (World Wide Web)
550	Internet

Close

In the Browse list pane, established authority headings in **1xx** fields are preceded by a red check, indicating that this is an authorized heading. Unestablished headings in **4xx** fields are preceded by an arrow, indicating a cross- reference to an authorized heading. Established “See Also” headings in **5xx** fields are not indexed in the browse list, unless they also exist as a **1xx** in another record.

3. Select an authority record from the list to view in the Viewing pane. Click on the **Control** or **Extended Info** tabs to view more information about the record.
4. When finished viewing the record, click **Close**.

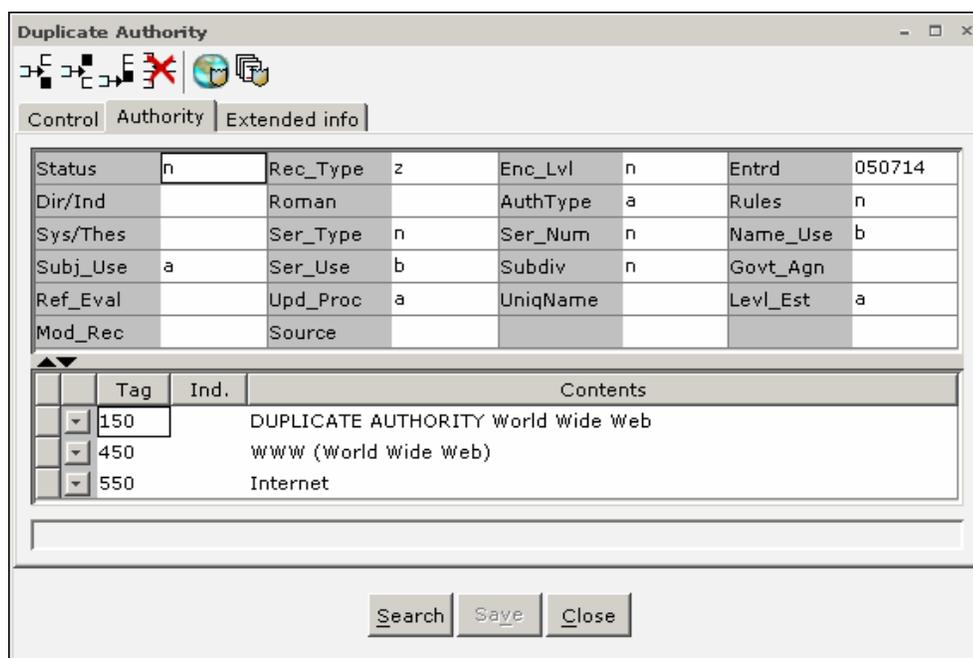
Duplicate Authority Wizard

Sometimes new authority records must be added that are similar to established terms already in the authority file such as a heading with subdivisions.

The Duplicate Authority wizard is used to create a new authority record in the authority file by copying the authority information of an existing record.

To duplicate an existing authority record

1. On the Authority Maintenance toolbar, click the **Duplicate Authority** wizard.  (Shortcut: **Shift-F7**). The Duplicate Authority search window appears.
2. Type the search terms in the **Search for** box, select the appropriate **Index**, and click **Search**.
3. Select the authority term to duplicate from the list, and click **Duplicate**. The Duplicate Authority window appears with **DUPLICATE AUTHORITY** preceding the leading term in the new record:
- 4.



Field	Value	Field	Value	Field	Value	Field	Value
Status	n	Rec_Type	z	Enc_Lvl	n	Entrd	050714
Dir/Ind		Roman		AuthType	a	Rules	n
Sys/Thes		Ser_Type	n	Ser_Num	n	Name_Use	b
Subj_Use	a	Ser_Use	b	Subdiv	n	Govt_Agn	
Ref_Eval		Upd_Proc	a	UniqName		Levl_Est	a
Mod_Rec		Source					

Tag	Ind.	Contents
150		DUPLICATE AUTHORITY World Wide Web
450		WWW (World Wide Web)
550		Internet

Modify the entry to the new heading, and add any additional authority information to the fixed fields and entries. Use the helpers to add or delete entries in the Entries area. Modify information in the **Control** and **Extended Info** tabs if necessary.

5. Click **Save** to save the new authority record.

Modify Authority Wizard

The Modify Authority wizard is used to modify records that are already in the authority database.

To modify an existing authority record

1. On the Authority Maintenance toolbar, click the **Modify Authority** wizard.  (Shortcut: **Shift-F4**). The Modify Authority search window appears.
2. Type the search terms in the **Search for** box, select the appropriate **Index**, and click **Search**.
3. Select the authority term to modify from the list, and click **Modify**. The Modify Authority window appears.
4. Modify authority fixed fields and entries as needed. Use the helpers to add or delete entries in the Entries area. Modify information in the **Control** and **Extended Info** tabs if necessary.
5. Click **Save** to save the newly updated authority record.

Delete Authority Wizard

This wizard is used to remove authority records from the authority file.

To delete an authority record

1. On the Authority Maintenance toolbar, click the **Delete Authority** wizard.  (Shortcut: **Alt-F9**). The search window appears.
2. Type the search terms in the **Search for** box, select the appropriate **Index**, and click **Search**.
3. Select the authority term to delete from the list, and click **Delete**. A confirmation window appears.

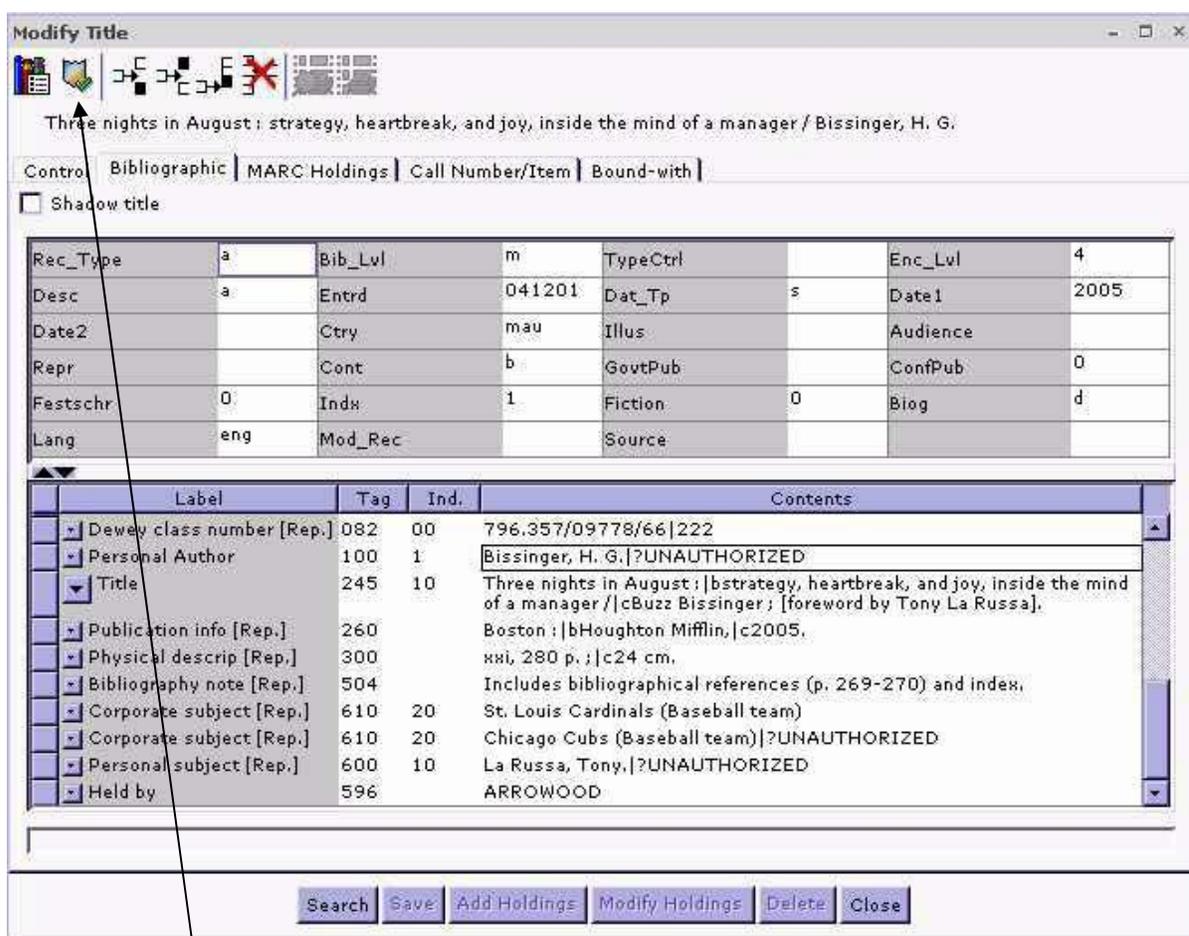
Note: Removing an authority record will leave any occurrence of that heading in the catalogue marked as |?UNAUTHORIZED.

Authority Control from the Bibliographic Record

When modifying, creating, or importing any bibliographic record, you can use the Validate headings helper on the Bibliographic tab, along with the Browse Authority, to check existing bibliographic records against the authority database, and either correct the heading with an existing authority heading or create a new authority “on the fly.” You can also check indicators for correctness and replace them.

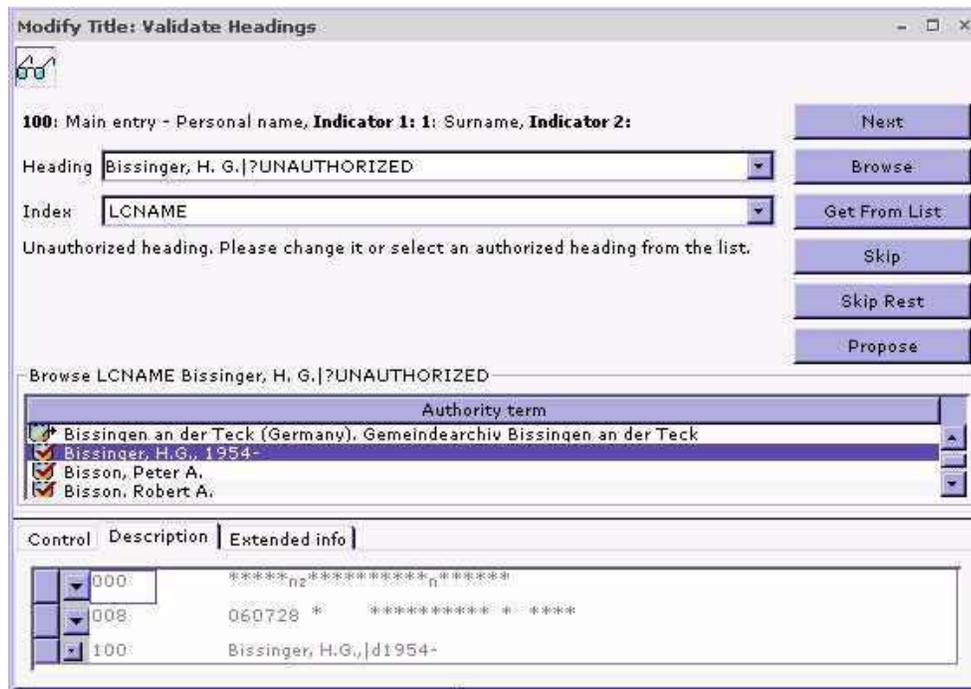
Validating Bibliographic Entries and Indicators

Use the Validate headings helper to check bibliographic headings under authority control and to validate indicators and subfields. This helper displays only in the Bibliographic tab when you



create or modify a title.

1. Click the **Validate headings** helper to check the entries in the Bibliographic record against the headings in the authority database. If an entry is found that does not have a match in the authority database, the following window appears:



2. If there is an appropriate replacement heading on the list, highlight it and click **Get From List**. The selected heading replaces the unauthorized heading. Use the **Browse** button to widen your search for replacement headings.
 3. After validating a heading, click **Next** to move to the next unauthorized heading. When all headings have been validated, a confirmation window appears:
-
4. Click **OK** to return to the bibliographic record.
 5. Click **Save** to save your changes, and **Close** to close the wizard.

Note: Entries may be skipped during the process by using the **Skip** or **Skip Rest** buttons. However, catalogue entries that are skipped will still not match existing authority records, and remain flagged as **|?UNAUTHORIZED** in the bibliographic record.

Proposing Authority Records

If you find a matching authority record for a controlled heading does not exist in the authority database to replace the existing entry during the Validate headings process, you can use SmartPORT (see p. 35-38 above) to search for and import one from LCAUTH into the local authority database. If there is no LC authority either, and the heading is a name or series for which an authority is required, you can choose to create a new authority record as part of the Validate headings process.

1. When an unauthorized heading appears, review the authority database for a possible replacement.
2. If no appropriate replacement exists, click the **Propose button** to create a new authority record “on the fly.” This new record is based upon the unauthorized entry in the

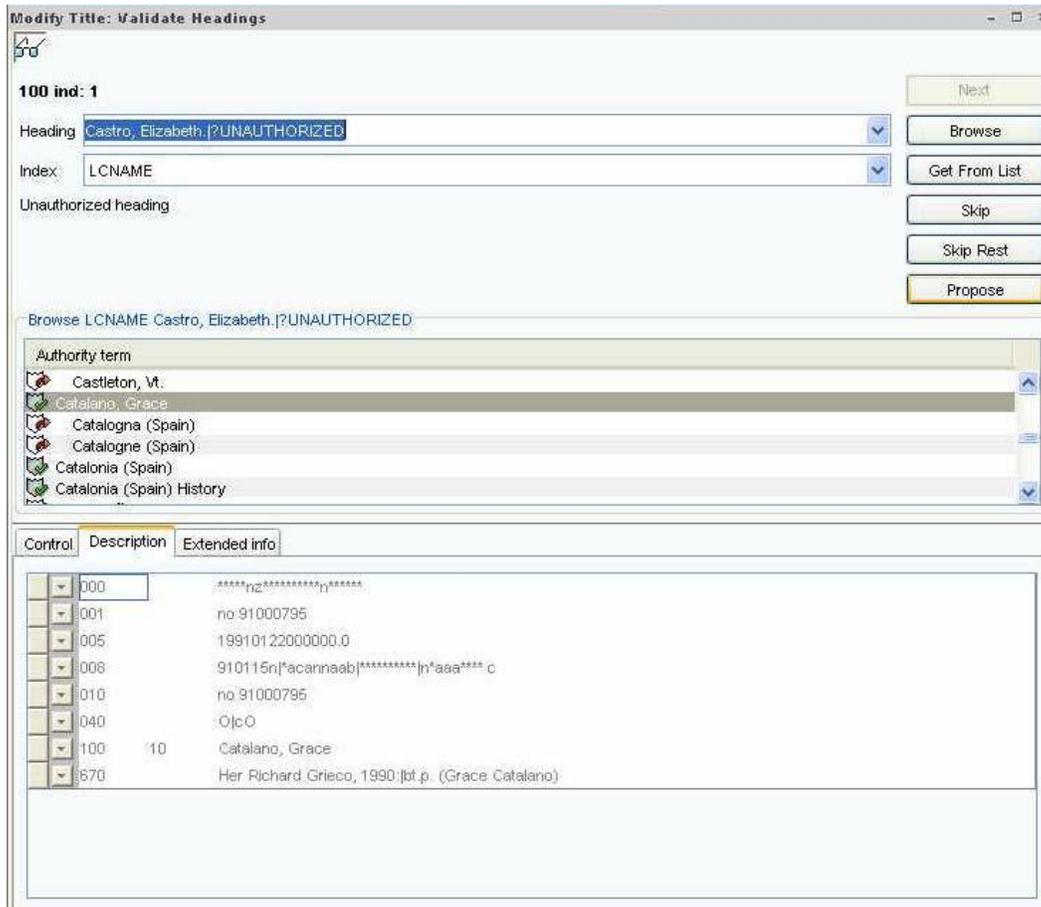
Status	Rec_Type	Enc_Lvl	Entrd
n	z	n	070223
Dir/Ind	AuthType	Rules	
n	l	a	c
Sys/Thes	Ser_Type	Ser_Num	Name_Use
a	n	n	a
Subj_Use	Subdiv	Govt_Agn	
a	b	n	l
Ref_Eval	Upd_Proc	UniqName	Levl_Est
n	a	a	a
Mod_Rec	Source		
	d		

Label	Tag	Ind.	Contents
Control number	001		XX32962
Control number ID	003		SIRSI
Date	005		20070223115656.0
Personal name	100	1	Castro, Elizabeth
Source data found	670		PERL and CGI for the World Wide Web , c2001 l t.p. (by Elizabeth Castro)

bibliographic record.

3. Fixed fields and entries are populated with information based on the entry in the bibliographic record. Use the helpers to insert additional entries such as **4xx** cross-references. After making any necessary changes or additions to fixed fields and entries information, click the **Control** tab.
4. Set the **Date authorized** field from NEVER to TODAY and the **Authorization level** field from PROVISIONAL to AUTHORIZED (unless you will be submitting your proposed records to a supervisor for review).

5. After making all necessary changes, click **OK** to save the record. The Validate Headings window reappears.



6. Click **Browse** to add the new proposed authority heading to the list.
7. Click **Get from List**. The **Next** button becomes available.
8. Click **Next** to validate the current heading and continue to check other unauthorized headings.

grave, and tilde. Instead of using the Symbol Table to input these, you can also enter them directly from the keyboard by typing numeric codes on the number keypad, while holding down the Alt key. These symbols with their corresponding codes are shown in the following table.

	Symbol	Alt+numberpad:
letters with circumflex	Â	0194
	â	0226
	Ê	0202
	ê	0234
	Î	0206
	î	0238
	Ô	0212
	ô	0244
	Û	0219
	û	0251
letters with grave	À	0192
	à	0224
	È	0200
	è	0232
	Ì	0204
	ì	0236
	Ò	0210
	ò	0242
	Ù	0217
ù	0249	

	Symbol	Alt+numberpad:
letters with tilde	Ã	0195
	ã	0227
	Ñ	0209
	ñ	0241
	Õ	0213
	õ	0245
O slash uppercase	Ø	0216
degree sign	°	0176
plus/minus	±	0177

Note: Remember that when inputting letters and diacritics as two separate characters into our new Unicode database, the diacritic is now entered *following* the letter it modifies.

Appendix 1 – Record Editor

Overview

The Record Editor simplifies the input of bibliographic data by providing lists of appropriate codes for fixed fields, indicators, and subfields. It also displays an alternate, expanded view of indicator and subfield data. The Record Editor presents MARC 21 definitions for most MARC elements.

Several wizards use the Record Editor:

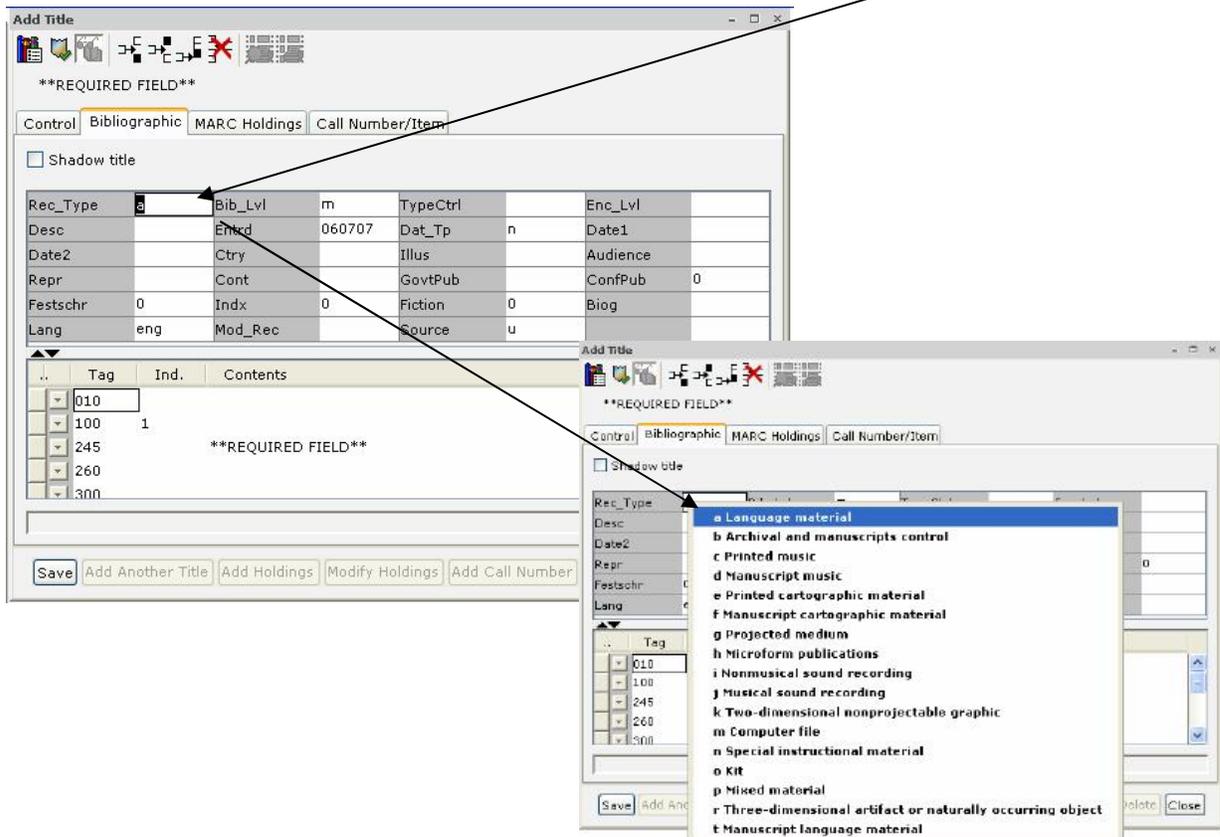
Add Title, Modify Title, and Duplicate Title.

Note: The Record Editor may also be referred to in Help files as the “MARC Editor.”

How It Works

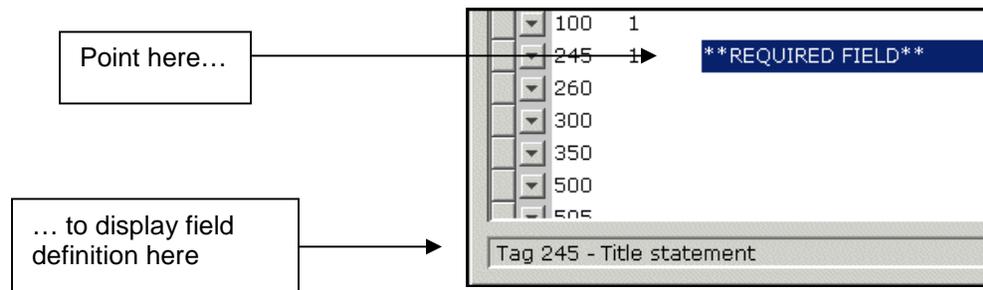
To see the Record Editor in action, try the following demonstration:

1. On the Title Maintenance toolbar, click the **Add Title** wizard.  The Set Properties window appears.
2. Click OK to accept the defaults. The Add Title window appears. Right-click in a fixed field to display the list of valid entries for that field:

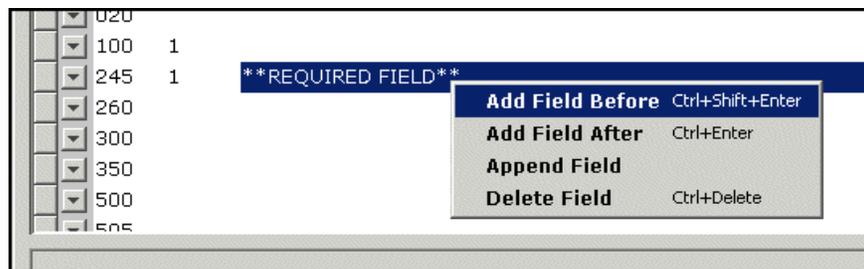


When using the Record Editor, follow these guidelines:

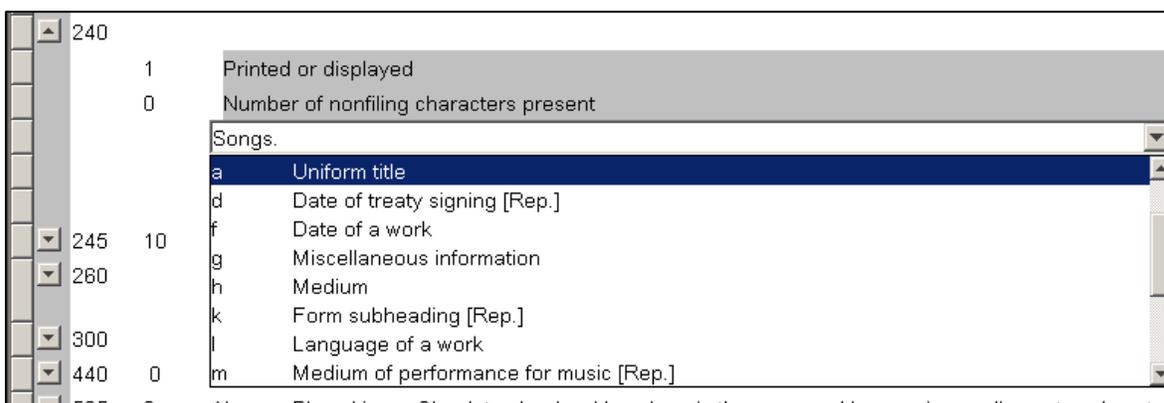
- You can move through a MARC record by pressing TAB or clicking in a specific field using the mouse. You can also use shortcut keys (listed in the Help file, and as **Appendix 5** in this manual).
- To help identify the MARC elements, SirsiDynix Symphony 3.2 displays definitions for every tag and subfield in the record. When you point to a particular MARC field, subfield, control field, or indicator, a brief definition of the element displays in the status bar.



- When modifying information, SirsiDynix Symphony 3.2 will accept only valid values for entries, indicators and subfields. If you enter an invalid value, an error message appears preventing you from exiting the field.
- Since the 245 title field is defined as mandatory, it displays in the Add Title Editor window with ****REQUIRED FIELD**** in the data field.
- When entering text into a field, indicate subfields by using the pipe (|) symbol.
- You can use standard Windows keyboard shortcuts (**Ctrl-X**, **Ctrl-C**, **Ctrl-V**) to cut, copy, and paste fields, indicators, and subfields.
- To insert additional fields, right-click in a field to open the shortcut menu:



- Click the arrow before the Tag number to expand the entry with each element on a separate line, summarizing indicator and subfield values. Highlight any one of these lines in order to open a drop-down list of MARC 21 definitions and valid entries for that field element:



Click the arrow to the left of the tag number again to collapse the line by line display of indicators and subfields and return to the standard display.

Alternative views

When setting the properties associated with any wizard that displays records in MARC format, you can choose between **Descriptive view** and **MARC view** in the Editor display options.

Be sure to select **Descriptive view** in order to display Fixed fields in a separate pane at the top of the record, with variable fields below.

Selecting MARC view will include the fixed fields among the variable fields, in a single string in the 008 control field. This is much harder to read and edit.



Appendix 2 – SmartPort Configuration

When SmartPort captures a record and loads it into the library's catalogue, it uses specified match points to determine if the record already exists in the catalogue. To set default values at your workstation, right-click the **SmartPort** wizard, and select Properties. The **SmartPort Properties** window appears.

Display property page: set to **Never**, unless you want to see this page every time you launch SmartPORT.

Bib Record Load Options: set to **Match and load**; you can change this to **Replace current record** at the point of capturing a record if now and then you need to overlay a preliminary record. Also select **Match on title control number**. In the **TCN source** box type **liso** to set the correct hierarchy for U of T.

Set the **Call sources** as follows: **LC,050,,N/LC,090,,N** if your library uses the LC classification scheme. If you use something else, click the gadget to open the “rules” window where you can select another scheme and set of MARC fields.

Select your library name from the drop-down **Library** list; set the record format to MARC, or MUSIC, MAP, etc., depending on the type of material you usually handle. Finally, to delete certain subject headings (e.g. French) on load, type **134567** in the **Remove subject headings** box.

Authority Record Load Options: select **Match and Load**; type **nc** into the control number source box.

Verify options and **Strip junktags:** select **Yes**.

Hit limit: here you can specify the number of brief records to display in the search results when you are connected to a single server or when connected to multiple servers.

Formatted full display: select **No** if you want to see MARC tags when displaying full records; select **Yes** if you prefer to see labeled fields instead.

SmartPort : Properties

Display property page: Wizard Startup Never

Defaults

MARC Import

Bibliographic Record Load Options

Replace current record

Match and load

Match on title control number

Match on title control number or indexed MARC tag

Match on title control number and indexed MARC tag

Title control number source: liso

Indexed MARC tag number:

Call sources: LC,050,,N/LC,090,,N

Library: ROBARTS

Format: MARC

Remove subject headings: 134567

Authority Record Load Options

Replace current record

Match and load

Authority control number source: nc

Verify options: Yes No

Strip junktags: Yes No

Script for special processing:

Hit limit for brief display

Single server limit: 50

Multi-server limit: 30

Browse terms limit: 8

Gateway timeout: 20 Seconds

Formatted full display: Yes No

OK Cancel

Appendix 3 – Printing Labels

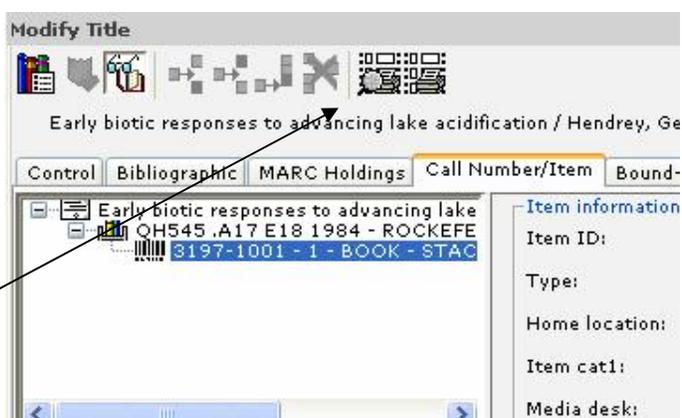
Overview

Labels can be generated two ways in SirsiDynix Symphony 3.2: (1) on demand using helpers or (2) in batch using reports. In both cases, the **Label Designer** wizard (see online Workflows Help) is used to set defaults for content and formatting.

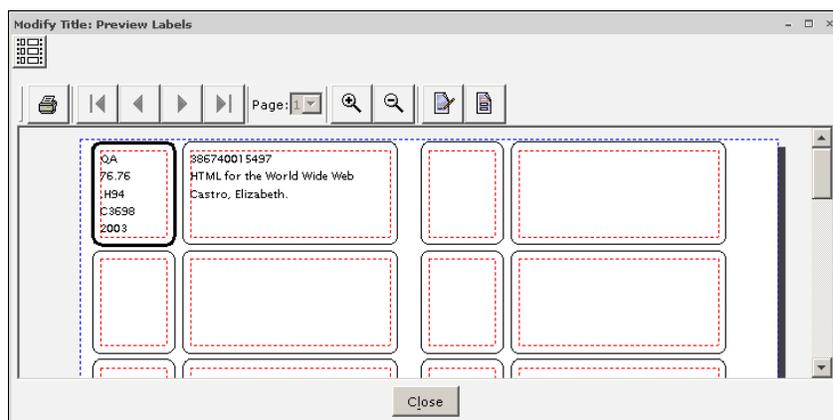
Printing Labels on Demand

Two helpers are available when creating, modifying, or displaying a call number- or item-level record. Preview or print labels using these helpers, which use a Label Template to determine content and formatting.

1. Using the **Modify Title** wizard, identify the title for which to print labels, and click the **Call Number/Item** tab.
2. Select the record for which to print a label, and click the **Print Preview Labels** helper. The Preview Labels window appears:



3. Use the **Print** helper to print the displayed labels, or click **Close**. The record selected in the tree during step 1 above determines which label or labels print. In the above example, only one item record was selected. If a call number record is selected, a label will print for each item record attached to that call number.



Printing Labels Using Reports

Labels can also be printed in batch through reports. As with the helpers, a Label Template determines content and formatting.

Print Custom Labels report

The Print Custom Labels report is located in the Bibliographic group of reports.

Schedule New Reports : Schedule Print Custom Labels

Basic | Item IDs | Copy Selection | Call Number Selection | Title Selection | Sorting | Label Template

Library: [] [X]

Home location: [] [X]

Current location: [] [X]

Item type: [] [X]

Item category 1: [] [X]

Item category 2: [] [X]

Permanent: Yes No Both

Circulate: Yes No Both

Extended info: [] [X]

In the shadow catalog: Yes No Both

Accountable: Yes No Both

Number of pieces: [] [X]

Date created: =07/14/2005 [X]

Last activity date: [] [X]

Schedule Run Now Save As Template Cancel

Enter individual item IDs to print, or make selections at the title, call number and item levels to identify the items for which labels will print. Also, choose the Label Template to use when printing these labels.

In the example above, the Date created field has been selected to print labels in batch for items added on that specific date.

Here's the result of this finished report:

Schedule New Reports : Print preview

Page: 1

QA 76.76 .H94 C3698 2003	386740015497 HTML for the World Wide Web Castro, Elizabeth.	QA 76.76 .H94 C3698 2003	386740017784 HTML for the World Wide Web Castro, Elizabeth.
QA 76.76 .H94 C3698 2003	386740012249 HTML for the World Wide Web Castro, Elizabeth.	QA 76.76 .H94 C3698 2003	386740016781 HTML for the World Wide Web Castro, Elizabeth.
QA 76.76 .H94 C3698 2003	386750018824 HTML for the World Wide Web Castro, Elizabeth.	QA 76.76 .H94 C3698 2003	386750013343 HTML for the World Wide Web Castro, Elizabeth.

Close

Appendix 4 – Sirsi Record Formats and Rec_Type Codes

Sirsi Workflows uses the **Record Format** settings from the *Control* tab to determine the fixed fields that are displayed in the Bib record. For non-book items this means that even when we input the correct code in the *Bibliographic* tab record, it is still necessary to choose the right MARC Record Format in the *Control* tab. The table below shows which **Rec_Type** codes (from MARC21) belong to which Sirsi **Record Formats**.

Use the **Record Formats** (*Control tab*) from the first column corresponding to the **Rec_Type** fixed field codes (*Bib tab*) in the second column.

Record Format	Rec_Type	Material
MARC	a, t	language material or manuscript language material
MUSIC	c, d, i, j	notated music, manuscript notated music, nonmusical sound recording, or musical sound recording
MAP	e, f	cartographic material or manuscript cartographic material
MRDF	m [etc.] *	computer software (including programs, games, fonts), numeric data, computer-oriented multimedia, online systems or services
VM	g, k, o, r	projected medium, two-dimensional nonprojectable graphic, kit, or three-dimensional artifact or naturally occurring object
MANUSCRIPT	p	mixed material

(The SERIALS format is used when the **Bib_Level** fixed field code is **s, b, or i.**)

Note:* for MRDF items (electronic resources), the **Rec_Type code “**m**” is now assigned only for the material described in the corresponding right-hand column above. The MARC21 manual says:

... if there is a significant aspect that causes it to fall into another [Rec_Type] category, code for that significant aspect (e.g., vector data that is cartographic is not coded as numeric but as cartographic). Other classes of electronic resources are coded for their most significant aspect (e.g. language material, graphic, cartographic material, sound, music, moving image). In case of doubt or if the most significant aspect cannot be determined, consider the item a computer file.

Thus an e-book has Rec_Type “**a**” and a photo CD is coded “**k**” (two-dimensional nonprojectable graphic), and so on. The **006** control field is then used to add the codes describing the computer file aspect (e.g. record type “**m**” and file type “**d**”).

Appendix 5a – Codes for “Non-spacing” Diacritics

<i>Display</i>	<i>Ctrl+Alt + keyboard:</i>	<i>Name</i>
´	b	acute
°	j	angstrom or circle above
˘	f	breve
◌̣	o	candrabindu
¸	p	cedilla
◌̥	t	circle below
ˆ	<i>use Table*</i>	circumflex
·	g	dot above
˙	r	dot below
¨	s	double dot below
ˆˆ	n	double acute
˘˘	z	double tilde, left half
˘˘	[double tilde, right half
=	u	double underscore

<i>Display</i>	<i>Ctrl+Alt+ keyboard:</i>	<i>Name</i>
`	<i>use Table*</i>	grave
ˇ	i	hacek (caron)
’	shift+6	high comma, centered
’	m	high comma, off center
¸	x	inverted (right) cedilla
¸	w	left hook/ tail*
ˆ	k	ligature, left half
ˆ	l	ligature, right half
ˉ	e	macron
¸	@	pseudo question mark
¸	q	right hook/ tail* (ogonek)
˜	<i>use Table*</i>	tilde
¨	h	umlaut or diaeresis
◌̣	y	upadhmaniya or half circle below

* see chapter on Diacritics and Special Characters for alternatives to using the Symbol Table for these characters

Appendix 5b – Codes for Special Characters

<i>Display</i>	<i>Ctrl+Alt+ keyboard:</i>	<i>Name</i>
æ	5	ae ligature (lowercase)
Æ	Shift+5	AE ligature (uppercase)
’	· (period)	alif
’	0 (zero)	ayn
£	9	British pound sign
ƒ	3	d with crossbar (lowercase)
Ɔ	Shift+3	D with crossbar (uppercase)
ð	: [colon]	eth
ı	1	l with slash (lowercase)
Ł	!	L with slash (uppercase)
’	<i>use Table</i>	miagkiy znak (soft sign)
·	(middle dot
b)	musical flat
ø	, (comma)	o with hook (lowercase)

<i>Display</i>	<i>Ctrl+Alt+ keyboard:</i>	<i>Name</i>
Ŏ	<	O with hook (uppercase)
ø	2	o with slash (lowercase)
Ø	<i>use Table*</i>	O with slash (uppercase)
œ	6	oe ligature (lowercase)
Œ	&	OE ligature (uppercase)
±	<i>use Table*</i>	plus or minus
þ	4	thorn (lowercase)
Þ	\$	thorn (uppercase)
ı	8	Turkish dotless i
”	7	tverdyi znak (hard sign)
u	- (hyphen)	u with hook (lowercase)
U	<i>use Table</i>	U with hook (uppercase)

**see chapter on Diacritics and Special Characters for alternatives to using the Symbol Table for these characters*

Appendix 6 – Wizards and Default Keyboard Shortcuts

<i>Wizard</i>	<i>Button</i>	<i>Keyboard shortcut</i>
Add field after		Ctrl+Enter
Add field before		Ctrl+Shift+Enter
Add Item		F9
Add Ordered Item		Alt-F12
Add Title		Shift-F2
Call Number & Item Maintenance		Shift-F9
Delete Authority		Alt-F9
Delete Title, Call Numbers...		F11
Display Authority		Alt-F5
Duplicate Title		Shift-F3
Edit Item		Shift-F11
Item Search and Display		F4
Modify Authority		Shift-F4
Modify Title		Alt-F2
Move to next Tab		Shift+Page Up
Move to previous Tab		Shift+ Page Down
Print		F12
SmartPORT		F5
Transfers		Alt-F7