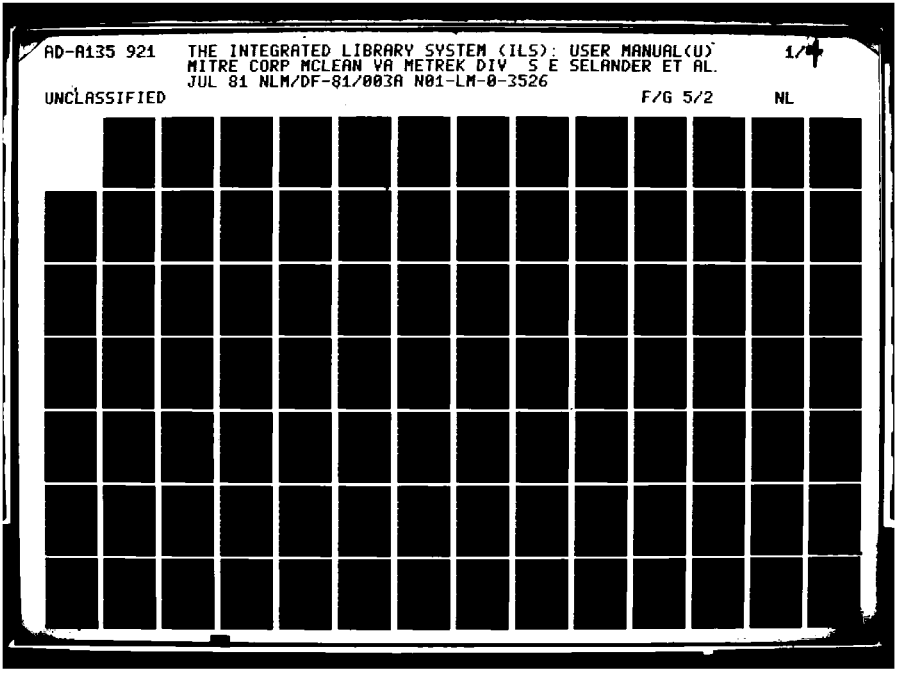
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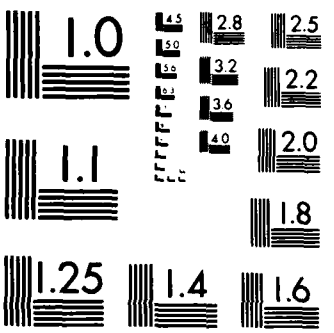

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S.E. Selander, et al

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The Integrated Library System (ILS) is a minicomputer-based library automation system designed to support a full range of technical processing and retrieval activities using a single master bibliographic file. (MBF). This document presents a full user manual for all ILS functions that are available in ILS Version 2.0. These functions are grouped into major subsystems:

- Bibliographic control - to create and maintain MARC-format bibliographic and authority records;
- Catalog access - an online catalog for patrons and staff;
- Circulation - to track location and status of library materials;
- Serials control - to check in serial issues; and
- Administrative - to set processing parameters and display reports.

The text in this document is identical to the online HELP text provided with the ILS software, but has been somewhat reorganized here into a format more suitable for a printed document.

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TABLE OF CONTENTS

1 INTRODUCTION TO USER'S MANUAL..... 1
2 INTRODUCTION TO FUNCTIONS..... 2
1 BIBLIOGRAPHIC SUBSYSTEM..... 2
1 BS OPTIONS..... 2
2 BI Overview..... 2
3 TA Overview..... 3
4 OT Overview..... 3
5 FW Overview..... 3
6 ST Overview..... 4
7 IA Overview..... 4
8 LI Overview..... 4
9 PO Overview..... 5
10 DT Overview..... 5
11 WA Overview..... 5
12 EW Overview..... 5
13 ME Overview..... 6
14 EI Overview..... 6
15 ID Overview..... 6
16 DC - Introduction..... 6
1 AUTHORITY TAG - Overview..... 7
2 INITIAL ARTICLE - Overview..... 7
3 INTERFACE TYPE - Introduction..... 7
4 ITEM TAG - Overview..... 7
5 LANGUAGE - Overview..... 8
6 PHRASE - Overview..... 8
7 SEARCH GROUPS - Overview..... 8
8 STOPWORD - Overview..... 9
9 SYNONYM - Overview..... 9
17 CR Overview..... 10
18 AM Overview..... 10
2 CATALOG ACCESS SUBSYSTEM OPTIONS..... 10
3 CIRCULATION SUBSYSTEM..... 11
1 Circulation Subsystem Options..... 11
2 CA Overview..... 12
3 CK Overview..... 12
4 CI Overview..... 12
5 CO Overview..... 12
6 IL Overview..... 13
7 IS Overview..... 13
8 ME Overview..... 13
9 MO Overview..... 13
10 NR Overview..... 14
11 PA Overview..... 14
12 PD Overview..... 14
13 PP Overview..... 14
14 PR Overview..... 15
15 PS Overview 15
16 PU Overview..... 15
17 RC Overview..... 15
18 RE Overview..... 15
19 RI Overview..... 16
20 RV Overview..... 16
21 SH Overview..... 16
22 SS Overview..... 17

23 VE Overview..... 17
4 SERIALS CONTROL SUBSYSTEM..... 18
1 SCS OPTIONS..... 18
2 AR Overview..... 18
3 SE Overview..... 18
5 ADMINISTRATIVE SUBSYSTEM..... 19
1 ADMINISTRATIVE SUBSYSTEM OPTIONS..... 19
2 CP Overview..... 19
3 Introduction to the ILS Help Maintenance System..... 20
4 JI Overview..... 20
5 JQ Overview..... 20
6 SA Overview..... 21
7 SP Overview..... 21
8 UD Overview..... 21
9 US Overview..... 21
10 VR Overview..... 21
11 DO Overview..... 22
12 PQ Overview..... 22
6 GENERAL FUNCTIONS..... 22
1 General Concepts..... 22
2 Function Keys..... 23
3 Identify Item..... 23
4 Identifying the Patron..... 24
5 ILS System Glossary..... 25
6 HELP System..... 25
7 PB Overview..... 25
8 PT Overview..... 26
9 DE Overview..... 26
10 EX Overview..... 27
11 TIME AND DATE..... 27
3 DETAILS OF ILS FUNCTIONS..... 28
1 DETAILS OF SUBSYSTEM FUNCTIONS..... 28
4 BIBLIOGRAPHIC SUBSYSTEM..... 29
1 BS INTRODUCTION..... 29
1 BIBLIOGRAPHIC SUBSYSTEM..... 29
2 BS OPTIONS..... 29
2 BIBLIOGRAPHIC ADD/EDIT..... 29
1 BI Overview..... 29
3 TAG ADD/EDIT..... 31
1 TA Overview..... 31
2 TA Step By Step..... 31
1 TA Create a Tag..... 32
2 TA Edit a Tag..... 33
1 TA Edit Another Tag..... 33
2 TA Edit Subfield 34
3 TA Edit Heading..... 35
4 TA Set Local Usage..... 37
5 TA Index on this Subfield..... 37
6 TA Delete This Subfield..... 37
7 TA Input New Subfield..... 38
8 TA Select Another Subfield..... 38
3 TA Special Features..... 39

4 OUTPUT TAGS..... 40
1 OT Overview..... 40
2 OT Step By Step..... 40
3 OT Special Features..... 41
5 FIND WORDS IN TAGS..... 42
1 FW Overview..... 42
2 FW Step By Step..... 42
3 FW Special Features..... 43
6 PRIORITY GROUPS..... 44
1 PG Overview..... 44
2 PG Step by Step..... 44
1 PG - Group#..... 44
2 PG - List..... 45
3 PG - New..... 45
3 PG Special Features..... 45
7 SELECTION STRATEGIES..... 46
1 ST Overview..... 46
2 ST Step by Step..... 46
1 ST - SS#..... 47
1 ST-#-Indicators..... 47
2 ST-#-Name..... 48
3 ST-#-Status codes..... 49
4 ST-#-Types..... 49
5 ST-#-Bib level..... 50
6 ST-#-Rec completeness..... 50
7 ST-#-Desc cat..... 51
8 ST-#-Tag selection..... 51
2 ST - #/DISPLAY..... 51
3 ST - LIST..... 52
4 ST - NEW..... 53
1 ST-NEW-Status codes..... 53
2 ST-NEW-Type..... 54
3 ST-NEW-Bib level..... 54
4 ST-NEW-Rec Completeness..... 55
5 ST-NEW-Desc cat..... 55
6 ST-NEW-Tag selection..... 56
3 ST Special Features..... 57
8 INDICATORS ADD/EDIT..... 58
1 IA Overview..... 58
2 IA Step by Step..... 58
1 IA - Edit position..... 59
2 IA - Edit value..... 59
3 IA - Edit types..... 60
4 IA - Edit meaning..... 61
5 IA - Edit another tag..... 61
6 IA - Delete..... 61
7 IA - Add indicator..... 61
8 IA - Edit another indicator..... 62
3 IA Special Features..... 62
9 LIST INDICATORS..... 63
1 LI Overview..... 63
2 LI Step by Step..... 63

10 PROCESS OCLC TAPE..... 65
1 PO Overview..... 65
2 PO Step by Step..... 65
3 PO Special Features..... 66
11 DISPLAY TAPE OUTPUT..... 67
1 DT Overview..... 67
2 DT Step by Step..... 67
3 DT Special Features..... 68
12 WORKSPACE ADD/DELETE..... 69
1 WA Overview..... 69
2 WA Step by Step..... 69
1 WA - Add..... 69
2 WA - Delete..... 70
3 WA Special Features..... 70
13 EDIT WORKSPACE RECORDS..... 71
1 EW Overview..... 71
2 EW Step by Step..... 71
1 EW - Edit..... 72
1 EW - Edit indicators..... 72
2 EW - Edit subfield data..... 72
2 EW - Delete..... 73
3 EW - Add..... 73
4 EW - Disposition..... 73
5 EW - Display..... 74
3 EW Special Features..... 74
14 NEWLY CATALOGED ITEM..... 75
1 NE Overview..... 75
2 NE Step By Step..... 75
1 Search for Item..... 76
2 NE Item Found Or Not..... 76
1 NE Item in MBF and Tape File..... 77
2 NE Item in Tape File..... 77
3 NE Item In MBF..... 78
4 NE Items In Neither File..... 78
3 NE Edit Record..... 78
4 NE Enter Barcode Data..... 79
3 NE Special Features..... 80
15 EDIT ITEM..... 81
1 EI Overview..... 81
2 EI Step By Step..... 81
1 Identify Item..... 81
2 EI Edit Item Record..... 82
3 EI File Item..... 83
3 EI Special Features..... 83
16 ITEM DELETE..... 84
1 ID Overview..... 84
2 ID Step By Step..... 84
1 Identify Item..... 84
2 ID Delete Record..... 85
3 ID Special Features..... 86
17 THE DICTIONARIES..... 87
1 INTRODUCTION TO DICTIONARIES..... 87

2 AUTHORITY TAG..... 88
3 INITIAL ARTICLE..... 89
1 INITIAL ARTICLE - Overview..... 89
2 INITIAL ARTICLE - Step by Step..... 89
1 INITIAL ARTICLE - Add/Delete..... 89
2 INITIAL ARTICLE - Edit/List..... 90
4 INTERFACE TYPE..... 91
5 ITEM TAG..... 92
1 ITEM TAG - Overview..... 92
2 ITEM TAG - Step by Step..... 92
1 ITEM TAG - ADD new tag..... 93
1 ITEM TAG - Add heading..... 93
2 ITEM TAG - Add subfield..... 94
2 ITEM TAG - EDIT/LIST tag..... 94
1 ITEM TAG - Tag chart..... 95
2 ITEM TAG - Edit heading..... 95
3 ITEM TAG - Add subfield..... 96
4 ITEM TAG - Edit subfield..... 96
5 ITEM TAG - Delete subfield..... 97
3 ITEM TAG - DELETE tag..... 97
3 ITEM TAG - Special Features..... 97
6 LANGUAGE..... 98
1 LANGUAGE - Overview..... 98
2 LANGUAGE - Step by Step..... 98
1 LANGUAGE - Add..... 98
2 LANGUAGE - Delete..... 99
3 LANGUAGE - Edit..... 99
4 LANGUAGE - List..... 100
7 PHRASE..... 101
1 PHRASE - Overview..... 101
2 PHRASE - Step by Step..... 101
1 PHRASE - Add..... 102
2 PHRASE - Delete..... 102
3 PHRASE - Edit..... 102
4 PHRASE - List..... 103
5 PHRASE - Create new list..... 103
8 SEARCH GROUP..... 104
1 SEARCH GROUPS - Overview..... 104
2 SEARCH GROUPS - Step by Step..... 104
1 SEARCH GROUPS - Add search group..... 105
1 SEARCH GROUPS - Add indexing info 105
2 SEARCH GROUPS - Add tag info..... 106
2 SEARCH GROUPS - DELETE..... 107
3 SEARCH GROUPS - EDIT..... 107
1 SEARCH GROUPS - Chart..... 109
2 SEARCH GROUPS - Edit heading..... 109
3 SEARCH GROUPS - Add tag..... 110
4 SEARCH GROUPS - Edit tag..... 110
5 SEARCH GROUPS - Del tag..... 111
4 SEARCH GROUPS - LIST..... 111
9 STOPWORD..... 113
1 STOPWORD - Overview..... 113
2 STOPWORD - Step by Step..... 113
1 STOPWORD - Add..... 114
2 STOPWORD - Delete..... 114
3 STOPWORD - Edit..... 114
4 STOPWORD - List..... 115

5 STOPWORD - Create new list..... 115
10 SYNONYM..... 116
1 SYNONYM - Overview..... 116
2 SYNONYM - Step by Step..... 116
1 SYNONYM - Add..... 117
2 SYNONYM - Delete..... 117
3 SYNONYM - Edit..... 118
4 SYNONYM - List..... 119
18 CATALOG REVIEW..... 120
1 CATALOG REVIEW..... 120
2 CR Overview..... 120
3 CR Step By Step..... 120
1 CR Identify review date..... 120
2 CR Delete review file entries..... 121
3 CR Review new records..... 121
4 CR Review duplicate records..... 122
19 AUTHORITY MAINTENANCE..... 123
1 AUTHORITY MAINTENANCE..... 123
2 AM Overview..... 123
3 AM Options..... 123
1 AM Edit authority record..... 123
2 AM Merge authority records..... 124
3 AM Add/delete cross-references..... 124
4 AM Special Features..... 125
5 CATALOG ACCESS SUBSYSTEM..... 126
1 INTRODUCTION TO SEARCHING..... 126
2 AUTHOR SEARCH..... 127
3 TITLE SEARCH..... 127
4 SUBJECT SEARCH..... 127
5 OTHER SEARCHES..... 128
1 TITLE KEY SEARCH..... 128
2 SERIES SEARCH..... 129
3 OCLC NUMBER SEARCH..... 129
4 ISBN/ISSN SEARCH..... 130
5 CALL NUMBER SEARCH..... 130
6 ORGANIZATION NAME SEARCH..... 130
7 MEETING NAME SEARCH..... 131
6 TERM SEARCH..... 131
6 CIRCULATION SUBSYSTEM..... 132
1 CS INTRODUCTION..... 132
1 Circulation Subsystem Options..... 132
2 Circulation Subsystem Overview..... 132
3 Circulation Subsystem Special Features..... 133
2 CART SYSTEM..... 134
1 CA Overview..... 134
2 CA Step By Step..... 134
1 CA Present Cart Being Loaded..... 134
2 CA Add New Cart..... 135
3 CA Delete Empty Cart..... 135
4 CA Edit Existing Cart..... 136
5 CA List All Defined Carts..... 136
6 CA Reset Cart..... 136
7 CA Shelving Cart..... 137
8 CA Temporary..... 137
9 Identify Item..... 137
3 CA Special Features..... 138

3 EXPENDIBLE ITEM..... 139
1 CX Overview..... 139
2 CX Step By Step..... 139
3 CX Special Features..... 140
4 CHECK IN..... 141
1 CI Overview..... 141
2 CI Step By Step..... 141
1 Identify Item..... 141
2 CI Complete Transaction..... 142
3 CI Special Features..... 142
5 CHECK OUT..... 144
1 CO Overview..... 144
2 CO Step By Step Procedures..... 144
1 Identify Patron..... 145
2 Identify Item..... 145
3 Complete Transaction..... 145
3 CO Special Features..... 145
6 INTER-LIBRARY LOAN..... 147
1 IL Overview..... 147
7 ITEM STATUS..... 148
1 IS Overview..... 148
2 IS Step By Step..... 148
1 Identify Item..... 149
2 IS Print Status..... 149
3 IS Special Features..... 150
8 MESSAGE..... 151
1 ME Overview..... 151
2 ME Step By Step..... 151
3 ME Special Features..... 153
9 MAIL OUT..... 154
1 MO Overview..... 154
2 MO Step By Step..... 154
3 MO Special Features..... 155
10 NOTIFY RESERVE..... 156
1 NR Overview..... 156
2 NR Step By Step..... 156
3 NR Special Features..... 157
11 PATRON ACTIVITY..... 158
1 PA Overview..... 158
2 PA Step By Step..... 158
3 PA Special Features..... 159
12 PATRON DELETE..... 160
1 PD Overview..... 160
2 PD Step By Step..... 160
1 Identify Patron..... 160
2 PD Delete Patron..... 161
3 PD Special Features..... 161
13 PRINT PULL SLIPS..... 162
1 PP Overview..... 162
2 PP Step By Step..... 162
3 PP Special Features..... 163
14 PATRON REGISTRATION..... 164
1 PR Overview..... 164
2 PR Step By Step..... 164
3 PR Special Features..... 165

15 PATRON STATUS 167
1 PS Overview 167
2 PS Step By Step 167
3 PS Special Features 168
16 PULL 169
1 PU Overview 169
2 PU Step By Step 169
3 PU Special Features 170
17 RECALL 171
1 RC Overview 171
2 RC Step By Step 171
3 RC Special Features 171
18 RENEW 172
1 RE Overview 172
2 RE Step By Step 172
1 Identify Patron 173
2 Identify Item 173
3 RE Complete Transaction 173
3 RE Special Features 173
19 RECEIPT CHECK-IN 175
1 RI Overview 175
20 RESERVE 176
1 RV Overview 176
2 RV Step By Step 176
1 RV Add a Reserve 177
2 RV Edit an Item or Patron Queue 177
3 RV DELETE an Item or Patron Queue 178
4 Identify Patron 179
5 Identify Item 179
3 RV Special Features 179
21 SHELF 180
1 SH Overview 180
2 SH Step By Step 180
3 SH Special Features 181
22 SET STATUS 182
1 SS Overview 182
2 SS Step By Step 182
1 SS Lost 183
2 SS Found 183
3 SS Patron Claims Returned 183
4 SS Patron Lost 183
5 SS Snag 184
6 SS Identify Item 184
23 VERIFY 185
1 VE Overview 185
2 VE Step By Step 185
3 VE Special Features 186
7 SERIALS CONTROL SUBSYSTEM 187
1 SCS INTRODUCTION 187
1 SCS OPTIONS 187
2 ADD ROUTING 188
1 AR Overview 188
2 AR Step By Step 188
1 Identify Item 188
2 AR Identification of Patron 189
3 AR Add Name 190
4 Identify Patron 190

5 AR Delete Name 190
6 AR List Name 190
7 AR Exit Add Routing 191
3 AR Special Features 191
3 SERIALS CHECK IN 192
1 SE Overview 192
2 SE Step by Step 192
1 SE Enter Year 193
2 SE Enter Month 193
3 SE Enter Day 194
4 SE Enter Volume 194
5 SE Any More Copies 194
6 SE Type of Serial 194
7 SE Loan Period 195
3 SE Special Features 195
8 ADMINISTRATIVE SUBSYSTEM 197
1 AS INTRODUCTION 197
1 ADMINISTRATIVE SUBSYSTEM 197
2 ADMINISTRATIVE SUBSYSTEM OPTIONS 197
3 ADMINISTRATIVE SUBSYSTEM OVERVIEW 197
4 ADMINISTRATIVE SUBSYSTEM SPECIAL FEATURES 198
1 General Concepts and Commands 198
2 CIRCULATION PARAMETERS 199
1 CP Overview 199
2 CP Step By Step 199
3 CP Special Features 200
3 HELP MAINTENANCE MANUAL 202
1 HM BACKGROUND 202
2 HM INTRODUCTION 203
1 The Paragraph 203
2 The Path 204
3 The Manual 205
4 The Directory 205
5 Text versus Structure 206
3 WORKING IN HM 209
1 Working with Paragraphs 209
1 Add Paragraph 209
2 Delete Paragraph 211
3 Edit Paragraph 211
1 Editing Paragraph Text 211
2 Editing Paragraph Structure 212
3 Editing Paragraph Structure (cont.) 214
4 Find Paragraph 215
5 Linking Paragraphs Together 217
6 Viewing Paragraphs 219
2 Working With Paths 219
1 Linking Paragraphs into Paths 220
2 Linking Paths to Paths 221
3 Working with the Directory 221
1 Add to the Directory 222
2 Delete from the Directory 223
3 Edit the Directory 224
4 Find Entries in the Directory 225
5 View the Directory 225
4 Working With Manuals 226
1 Add Manuals 226
1 Chain Paragraphs into Manuals 227

2 Chain Manuals to Manuals..... 229
3 Chain Paragraphs and Manuals into Manuals..... 229
2 Delete Manuals..... 230
3 Edit Manuals..... 230
4 Find Manuals..... 231
5 Produce Manuals in Hard Copy..... 232
6 View Manuals..... 232
5 Working in the Glossary..... 233
1 Add to the Glossary..... 233
2 Delete Glossary..... 234
3 Edit Glossary..... 234
4 Find Glossary..... 235
5 View Glossary..... 235
6 Print Glossary..... 236
4 JOB INITIATION..... 237
1 JI Overview..... 237
2 JI Step By Step..... 237
3 JI Special Features..... 238
5 JOB QUEUE..... 239
1 JQ Overview..... 239
2 JQ Step by Step..... 239
6 SYSTEM ACTIVITY..... 240
1 SA Overview..... 240
2 SA Step By Step..... 240
3 SA Special Features..... 240
7 SYSTEM PARAMETERS..... 241
1 SP Overview..... 241
2 SP Step By Step..... 241
3 SP Special Features..... 242
8 USER DELETE..... 243
1 UD Overview..... 243
2 UD Step By Step..... 243
3 UD Special Features..... 243
9 USER ADD/EDIT..... 244
1 US Overview..... 244
2 US Step By Step..... 244
3 US Special Features..... 245
10 VIEW REPORTS..... 246
1 VR Overview..... 246
2 VR Step By Step..... 246
1 VR Select Report..... 246
2 VR SELECT DATE..... 247
3 VR Special Features..... 247
11 DOWN SYSTEM..... 247
1 DO Overview..... 247
12 PATRON FILE DEFINITION..... 249
1 PATRON FILE DEFINITION..... 249
2 PQ Overview..... 249
3 PQ Step-by-Step..... 249
4 PQ Options..... 250
1 PQ Add patron data element..... 250
1 PQ Data element characteristics..... 250
2 PQ Edit patron data element..... 251
3 PQ Edit question list..... 251
1 PQ Display question list..... 252
2 PQ Change question order..... 252
4 PQ Display question list..... 253

9 GENERAL INFORMATION 254
1 GENERAL CONCEPTS 254
1 The DISPLAY Command 254
2 The FORWARD Command 255
3 The BACKUP Command 255
4 The COMBINE Command 255
5 The TRAVEL Command 256
6 Working with Item and Patron Lists 256
7 VIPS (Vol/Issue/Part/Supplement) 257
2 FUNCTION KEYS 258
1 The ? Function Key 258
2 The - Function Key 258
3 The F Function Key 259
4 The B Function Key 259
5 THE HELP FUNCTION KEY 259
6 THE PREVIOUS PATRON FUNCTION KEY 260
7 THE PREVIOUS ITEM FUNCTION KEY 260
8 The / Function Key 260
3 IDENTIFY ITEM 262
1 Identify Item 262
2 Access by Item Identification Number 262
3 Access by Author 263
4 Access by Call Number 263
5 Access by ISSN or ISBN 264
6 Access by LC Card Number 264
7 Access by Title Key 265
8 Access by Author/Title Key 265
9 Access by Series 265
10 Message (Item Just Entered) 266
4 IDENTIFY PATRON 267
5 ILS SYSTEM GLOSSARY 268
6 PRINT BARCODE 269
1 PB Overview 269
2 PB Step by Step 269
1 PB Identify Items 270
2 Identify Item 270
3 PB Identify Patron 271
4 PB Batch Print 272
3 PB Special Features 273
7 PRINT TEMPORARY LABELS 274
1 PT Overview 274
2 PT Step by Step 274
3 PT Special Features 275
8 DETAIL 276
1 DE Overview 276
2 DE Step by Step 276
9 EXPERIENCE 277
1 EX Overview 277
2 EX Step by Step 277
10 TIME AND DATE 278

1 INTRODUCTION TO USER'S MANUAL

The Integrated Library System (ILS) is a minicomputer-based library automation system which supports library technical processing and retrieval activities using a single master bibliographic file.

The ILS USER'S MANUAL provides detailed instruction for use of all functions within ILS. The text is the same as the online HELP provided with the ILS software, but has been reorganized somewhat for publication in this printed form.

The ILS USER'S MANUAL is divided into the following sections.

* INTRODUCTION TO ILS FUNCTIONS	This section presents a paragraph of introductory information about each function within each subsystem.
* BIBLIOGRAPHIC SUBSYSTEM	The Bibliographic Subsystem consists of functions which enable authorized users to build and maintain the Master Bibliographic File.
* CATALOG ACCESS SUBSYSTEM	The Catalog Access Subsystem provides an online catalog for patrons and staff.
* CIRCULATION SUBSYSTEM	The Circulation Subsystem consists of functions which maintain information about library patrons and the location and current status of items.
* SERIALS CHECK-IN SUBSYSTEM	The Serials Check-in System consists of functions used to process receipt of serial issues
* ADMINISTRATIVE SUBSYSTEM	The Administrative Subsystem consists of functions which allow authorized users to set various system parameters at the local ILS installation, and to display reports.
* GENERAL FUNCTIONS	General Functions includes several unrelated functions which are used throughout ILS in all its subsystems.

2 INTRODUCTION TO FUNCTIONS

This section is intended to give the user a brief overview of all the ILS functions and how they operate together in ILS. It is arranged by subsystem. For detailed information on how each function works, the user should consult the appropriate subsystem below.

2.1 BIBLIOGRAPHIC SUBSYSTEM

The Bibliographic Subsystem is a collection of functions which enable authorized users to build and maintain the Master Bibliographic File and associated authority files and indexes.

AVAILABLE INFORMATION

1. BS OPTIONS
2. GLOSSARY FOR THE ILS SYSTEM

For more information, select the number for the appropriate discussion.

2.1.1 BS OPTIONS

The Bibliographic Subsystem functions, which allow authorized users to create and maintain bibliographic information, are:

1. TAG ADD/EDIT
2. OUTPUT TAGS
3. FIND WORDS IN TAGS
4. PRIORITY GROUPS
5. SELECTION STRATEGIES
6. INDICATORS ADD/EDIT
7. LIST INDICATORS
8. PROCESS OCLC TAPE
9. DISPLAY TAPE OUTPUT
10. WORKSPACE ADD/DELETE
11. EDIT WS RECORDS
12. NEWLY CATALOGED ITEM
13. EDIT ITEM
14. ITEM DELETE
15. DICTIONARIES
16. GENERAL FUNCTIONS
17. CATALOG REVIEW
18. AUTHORITY MAINTENANCE
19. BIBLIOGRAPHIC ADD/EDIT

For HELP with any of these functions, enter the number:

2.1.2 BI Overview

BIBLIOGRAPHIC ADD/EDIT allows users to input bibliographic records locally using a flexible online cataloging work form. This feature is under development and is not operational as of July 1981. Until this capability is completed library staff should use the NEWLY-CATALOGED ITEM function to input records from the terminal.

2.1.3 TA Overview

ILS contains a list of all tags currently recognized as part of the MARC record. The TAG CREATE/EDIT function enables authorized users to ADD to the list of MARC tags as new tags are authorized or to create local tags as needed using the range of tag 'numbers' from AAA-ZZZ. TAG CREATE/EDIT also allows authorized users to EDIT existing tags.

For more HELP with CREATING or EDITING tags go FORWARD to Step By Step.

For more information on the AAA-ZZZ tag 'numbers' go FORWARD twice to Special Features.

2.1.4 OT Overview

The OUTPUT TAGS (OT) function allows authorized users to display or print out information from bibliographic tags in the Item Tag Dictionary. The entire Dictionary or selected portions may be displayed. For each tag specified, a chart of information about that tag is displayed, including such information as the tag name, whether it is locally used, if it is indexed, # of repeats per record, the MIIS node, what all its valid subfields are, and for which types of materials each subfield is appropriate. For more information about the Item Tag Dictionary, see the HELP text for Item Tag Dictionary in the DICTIONARIES (DC) function.

2.1.5 FW Overview

The FW function (Find Words in Tags) allows authorized users to search the Item Tag Dictionary for tags containing a specified word(s) in the tag name or in subfield names. Thus, it is useful for pulling together a list of all tags containing a common word(s), e.g., all tags whose tag or subfield names contain the word 'date'. For more information about the Item Tag Dictionary, see HELP text for the function DICTIONARIES.

Some items of bibliographic information may appear in several different OCLC tags. E.g., call numbers may be in tags 090,099 and 150. Such a set of tags may be included in a single Priority Group so that only one of the tags in the PG is actually extracted from the OCLC tape. ILS extracts the bibliographic information for an item from the OCLC tape by searching for the data in a specified tag order ('prioritized') or by extracting data from the first found tag ('don't care'). The PRIORITY GROUPS function allows authorized users to define these Priority Groups. This definition consists of naming the tags which belong to the PG in question and defining their priority for selection (if any).

Priority Groups influence the movement of bibliographic data from OCLC tape into a workspace. Thus, it is during the creation of Selection Strategies that use of particular Priority Groups is specified.

2.1.6 ST Overview

Selection Strategies are utilized during the initial processing of OCLC tapes, source authority tapes, or any other MARC tape. The library establishes one or more Selection Strategies (SS) to define criteria for selecting which records, and which fields and subfields from those records, are stripped off the tape and read into a workspace for further processing. While in the workspace, records may be displayed and/or edited. Records may then be moved from the workspace into the Master Bibliographic File (MBF), according to the tag definitions in the Item Tag Dictionary. Such an approach allows a library to: 1) optionally create subsets of records rather than dealing with the total number of records on a particular tape at one time, e.g., in order to process records for monographs separately from records for other types of materials; and 2) to read into a temporary workspace more information about a record than will be incorporated into the permanent MBF, e.g., in order to look at the full MARC record in the workspace before loading a possibly abbreviated record into the MBF.

The SELECTION STRATEGIES (ST) function allows authorized users to create, edit, list, and delete Selection Strategies (SS). An SS (1) describes the bibliographic attributes and indicator criteria of records to be input to the workspace from a bibliographic or source authority tape and (2) describes the elements (i.e., fields and subfields) to be input from qualifying records. Bibliographic attributes include information in the fixed fields, such as status codes, type of record code, bibliographic level code, record completeness code, and descriptive cataloging code. For more detailed information than can be presented in HELP, see Susan G. King's A Guide to Using the Bibliographic Features of the Integrated Library System (ILS), MITRE Corporation, March 1980.

2.1.7 IA Overview

Indicator information is carried in the Item Tag Dictionary along with its appropriate bibliographic tag. A bibliographic tag may have a minimum of none and a maximum of 2 defined indicators; each existing indicator may assume a value of 0-9 or may be blank. The INDICATOR ADD/EDIT (and LIST INDICATORS) function allows access to the indicator data in the Item Tag Dictionary. This data defines each indicator, its position and possible values, the types of materials for which it is applicable, and its meaning. Indicator information may be viewed via the LIST INDICATORS (LI) function. The IA function allows authorized users to add new indicators to and edit existing indicators of bibliographic tags in the Item Tag Dictionary.

2.1.8 LI Overview

Indicator information is carried in the Item Tag Dictionary along with its appropriate bibliographic tag. A bibliographic tag may have a minimum of none and a maximum of 2 indicators; each existing indicator may assume a value of 0-9 or may be blank. The LIST INDICATOR (and

INDICATOR ADD/EDIT) function allows access to the indicator data in the Item Tag Dictionary. This data defines each indicator, its position and possible values, the types of materials for which it is applicable, and its meaning. The LIST INDICATORS (LI) function allows authorized users to display or print out information from indicators associated with bibliographic tags in the Item Tag Dictionary. All existing indicators or indicators associated with a specific subset of bibliographic tags may be displayed.

2.1.9 PO Overview

The PO function controls the reading of data from a MARC bibliographic or authority tape (*) into an ILS workspace. Users must specify to the PO function whether the tape contains bibliographic or authority data, whether the records are to be loaded directly to the MBF or into a workspace, and which Selection Strategy is to be used.

ILS first must clear certain working areas on the disk in preparation for reading new records, then reads the records into the MBF or into the specified workspace, and finally indexes the records so that they can be accessed through the online catalog (if loaded to the MBF) or through the NEWLY CATALOGED ITEM function (if loaded to a workspace).

(*) The authority file load is not complete as of July 1981.

2.1.10 DT Overview

The DISPLAY TAPE OUTPUT function (DT) allows authorized users to display records which have been copied from an input MARC tape into a workspace according to a specified Selection Strategy. The Selection Strategy used and various other information concerning the transfer of records into the workspace may also be viewed. The display can be viewed at the terminal or may be printed out.

2.1.11 WA Overview

The WORKSPACE ADD/DELETE (WA) function is used in defining new workspaces and in eliminating workspaces no longer needed. Records being read from an input MARC tape must be read into a previously created workspace with a defined name and number. The WA function allows authorized users to create, delete, and list workspaces.

2.1.12 EW Overview

The EDIT WS RECORDS function (EW) allows authorized users to edit records which have been read into a workspace. Data in existing fields may be changed or deleted; new fields my be added; the entire record may be displayed. The edited record may then be filed back into the workspace.

moved into the Master Bibliographic File (MBF), restored to its original state before editing, or deleted from the workspace. Thus, the EW function allows a library to make changes to individual records in the workspace before further processing or to delete records from the workspace.

2.1.13 NE Overview

NEWLY CATALOGED ITEM permits authorized users to enter cataloging data into the Master Bibliographic File (MBF). It enables catalogers to edit and transfer records from an ILS workspace (Tape File) into the MBF, as well as to enter original data directly into the MBF.

Utilizing NEWLY CATALOGED ITEM, the user may search both the MBF and ILS workspaces (Tape Files) for a record of an item, either by title or by call number. If a workspace (Tape File) contains a MARC record for the item, the user may edit or add to the record, produce a permanent barcode label, and add the record permanently to the MBF. If the MBF contains a MARC record for the item, the user may enter a Copy 2 (or Copy 3, etc.) and produce a barcode label.

2.1.14 EI Overview

The EDIT ITEM function allows authorized users to edit or add to cataloging data of records in the Master Bibliographic File (MBF). The user first identifies the record to be edited. ILS then allows the user to edit the record by adding new fields or subfields, deleting fields or subfields, or editing the contents of existing fields and subfields. ILS then files the edited record in the MBF.

2.1.15 ID Overview

The ITEM DELETE function allows authorized users to permanently remove a bibliographic record from the Master Bibliographic File (MBF) and from the activity record associated with the item. It is used when weeding an item from the collection or removing the record of a lost item. The user first identifies the item whose record is to be deleted. The user can then delete a specific Volume, Issue, Part, Supplement or Copy. If the library only one copy of the item, the user can remove it entirely from the MBF.

2.1.16 DC - Introduction

The DICTIONARIES (DC) function allows authorized users to create and maintain various files used to support initial creation and subsequent searching of the Master Bibliographic File (MBF), the Authority File, and the various indexes. These functions are primarily used by the library at the time of implementation of ILS.

When entering DICTIONARIES, ILS asks:

WHICH DICTIONARY? User types in first few unique letters of desired dictionary or '/' to exit DC function

The following dictionaries exist:

(1) Authority Tag	(4) Item Tag	(7) Search Group
(2) Initial Article	(5) Language	(8) Stopword
(3) Interface Type	(6) Phrase	(9) Synonym

Press 1,2,3,4,5,6,7,8, or 9 to get HELP for a specific dictionary.

2.1.16.1 AUTHORITY TAG - Overview

The AUTHORITY TAG function allows authorized users to add, delete, edit or list entries in the Authority Tag Dictionary. New tags may be defined, selected portions of existing tags may be edited, and/or entire tags may be deleted.

2.1.16.2 INITIAL ARTICLE - Overview

The Initial Article Dictionary is comprised of several lists of initial articles for different languages. It is used in ILS to define initial articles to be ignored when either filing a title into or searching for a title in the Divided Catalog Index. The INITIAL ARTICLE function allows authorized users to create a new initial article list; to add to, delete from or list the contents of an existing initial article; or to delete an entire initial article list.

2.1.16.3 INTERFACE TYPE - Introduction

The INTERFACE TYPE function allows library staff to identify the kinds of online catalog searches that will be offered to each type of searcher. With this function users may add, edit, or delete search groups and search processing types, or list the search groups currently defined for a given interface type.

This function is under development and is not fully operational as of 1 July 1981.

2.1.16.4 ITEM TAG - Overview

The Item Tag Dictionary is a list of all valid OCLC tags and locally defined tags. It defines for each tag its name, all valid subfields and the formats for which each subfield is valid, the number of repeats allowed in a bibliographic record, and whether the tag is used in the local Master Bibliographic File (MBF). It is used as an authoritative reference file for cataloging staff, as well as in the actual creation and maintenance of MBF.

In essence, this dictionary defines the library's profile for selecting which fields and subfields from a library's OCLC tapes are extracted and transferred into the local MBF. In addition to OCLC tags, ILS allows individual libraries to define tags which carry locally defined information.

The ITEM TAG function allows authorized users to add, delete, edit or list entries in the Item Tag Dictionary. New tags may be defined, selected portions of existing tags may be edited, and/or entire tags may be deleted. For information in greater detail than can be provided in HELP, users are referred to Lister Hill Contractor Report CR 80-02, "A User's Guide to Maintaining the Master Bibliographic File of the Integrated Library System" by Sandy E. Anderson, MITRE Corp.

2.1.16.5 LANGUAGE - Overview

The Language Dictionary is a list of languages and their 3-letter mnemonics. It serves as a reference authority list for the language codes entered into the OCLC 008 language field. The LANGUAGE function allows authorized users to add, delete, edit or list entries in the Language Dictionary.

2.1.16.6 PHRASE - Overview

The Phrase List (PWL) is comprised of several lists of multi-word phrases whose identities are to be maintained during any keywording process. It is used in ILS in primarily two activities. In building the Keyword Index, PWL is used to ensure that the defined phrase in its entirety is entered into the Keyword Index, even if the phrse contains defined stopwords. Likewise, when a user enters a term search, PWL is consulted to check for defined phrases. The individual words of a defined phrase are also entered into the Keyword Index in the usual manner unless they are in the Stopword Dictionary.

Each PWL is associated with a specific language. Phrase lists may exist only for languages whose language code is defined in the Language Dictionary. Each language may have one or more phrase lists associated with it. E.g., there may be two separate phrase lists (corporate phrases and geographic phrases) defined for English; there may also be a phrase list defined for French, and another one for German. All phrase lists associated with a specific language are sequentially numbered by ILS at the time of their creation. In order to specify a phrase list, the user must specify both the associated language and the specific PWL number. The PHRASE function allows authorized users to create new phrase lists, to list or edit the contents of existing phrase lists, or to delete entire phrase lists.

2.1.16.7 SEARCH GROUPS - Overview

The Search Group Dictionary consists of a list of library-defined Search Groups and all bibliographic tags which comprise each Search Group. This dictionary maintains the Authority File and the searching indexes. When bibliographic records are added to the Master Bibliographic File (MBF),

the Item Tag Dictionary is consulted to determine to which Search Group(s) (if any) each tag belongs. Then the Search Group Dictionary is consulted in order to determine if the data from that tag is authority-controlled and/or if data from that tag is indexed in the Keyword Index and/or the Divided Catalog Index. Similar tags are grouped together into defined Search Groups, e.g., an Author Search Group might consist of any name which originates in the 100 field, the 400 field, the 700 field, or the 800 field. Thus, if a patron does an author search for the name 'Milton', the above search group definition would have created indexes such that any occurrence of 'Milton' in tags 100, 400, 700, or 800 would be retrieved.

The SEARCH GROUP function allows authorized users to create new search groups, edit existing search groups, or delete entire search groups in the Search Group Dictionary. Decisions about search group definitions are made at the time of implementation of ILS. Although the Search Group Dictionary may be modified at a later time, such changes must be executed with care, since search group definitions determine the contents of the Authority File and the searching indexes.

2.1.16.8 STOPWORD - Overview

The Stopword List is comprised of several lists of defined words or phrases to be ignored during ILS processing of user, patron, or bibliographic input. Stopwords in general are common high-frequency words which in themselves carry little meaning, e.g., the words "and," "for," or "Mr." and are therefore not useful as searching terms. The Stopword List is used in ILS in primarily two activities. In building the Keyword Index, the Stopword List is consulted in order to eliminate the keywording of defined stopwords.

Every Stopword List is associated with a specific language. Stopword lists may exist only for languages whose language code is defined in the Language Dictionary. Each language may have one or more stopword lists associated with it. E.g., there maybe three separate stopword lists (common words, abbreviations, and geographic terms) defined for English; there may also be a stopword list of common words defined for French, and another one for German. All stopword lists associated with a specific language are sequentially numbered by ILS at the time of their creation. In order to specify a specific stopword list, the user must specify both the associated language and the specific SWL number.

The STOPWORD function allows authorized users to create new stopword lists, to list or edit the contents of existing stopword lists, or to delete entire stopword lists.

2.1.16.9 SYNONYM - Overview

The Synonym Dictionary is a list of defined synonyms for any given word, phrase, or abbreviation. The Synonym Dictionary may be viewed by the patron to suggest additional or alternative search terms. The file is not accessed automatically in the search process, but is intended as a user aid only.

The function SYNONYM is used to add, delete, edit or list words in the

Synonym Dictionary. An entry in the Synonym Dictionary consists of a root word its list of synonyms. Each word in the list of synonyms is automatically displayed as a synonym of the root word and, similarly, the root word is automatically displayed as a synonym for each of the words in its synonym list. However, words within a given list of synonyms are not displayed as synonyms for each other unless so defined explicitly.

For example,

Root Word	List of Synonyms
children	boys,brats,girls,kids,tots
boys	brats,males
girls	females

The synonyms displayed for children are: boys,brats,girls,kids,tots.
The synonyms displayed for boys are: brats,children,boys.
The synonyms displayed for girls are: children,females.
The synonyms displayed for kids are: children.
The synonyms displayed for tots are: children.

2.1.17 CR Overview

CATALOG REVIEW is a process by which a librarian may review the bibliographic records added directly to the Master Bibliographic File by the PROCESS OCLC TAPE function. All such records will have been fully entered in the MBF and indexed for searching through the online catalog; the librarian uses the CATALOG REVIEW function to verify that the bibliographic information is accurate and to approve correct records or edit invalid data.

2.1.18 AM Overview

The AUTHORITY MAINTENANCE functions update the authority file which supports online catalog searching. Using this feature, a librarian may edit an authority record, merge an invalid authority record into a valid record, and maintain cross-references. Affected bibliographic records are updated immediately.

For a more detailed description of AUTHORITY MAINTENANCE, enter F to see AM Options.

2.2 CATALOG ACCESS SUBSYSTEM OPTIONS

The Catalog Access Subsystem is the ILS online catalog. It allows users to search the Master Bibliographic File using a number of different search types.

There are 7 different options in the CATALOG ACCESS SUBSYSTEM (CAC):

1. ES = ENTER SEARCH
2. AU = AUTHOR SEARCH
3. TI = TITLE SEARCH
4. SU = SUBJECT SEARCH
5. OS = OTHER SEARCHES
6. TM = TERM SEARCH
7. GF = GENERAL FUNCTIONS

For more information about any of these options
select the number of the option desired.

2.3 CIRCULATION SUBSYSTEM

The Circulation Subsystem is the part of ILS which maintains the location and disposition (information related to the status and patron responsibility) of all items in the collection.

INFORMATION AVAILABLE

(1) Options of the Circulation Subsystem

(2) Overview of the Circulation Subsystem

(3) Special Features of the Circulation Subsystem

(4) Glossary of terms used in the ILS System

Select the number of the option desired:

2.3.1 Circulation Subsystem Options

There are 23 different options in the CIRCULATION SUBSYSTEM (CS). They are:

1. CA = CART SYSTEM
2. CX = EXPENDIBLE ITEM
3. CI = CHECK IN ITEMS
4. CO = CHECK ITEMS OUT
5. IL = INTERLIBRARY LOAN
6. IS = ITEM STATUS
7. ME = MESSAGES (PATRONS/ITEMS)
8. MO = MAIL OUT ITEMS
9. NR = NOTIFY RESERVE
10. PA = PATRON ACTIVITY
11. PD = PATRON DELETE
12. PP = PRINT PULL SLIPS
13. PR = PATRON REGISTRATION
14. PS = PATRON STATUS
15. PU = PULL
16. RC = RECALL
17. RE = RENEW
18. RI = RECEIPT CHECK IN
19. RV = RESERVE
20. SH = SHELF
21. SS = SET STATUS
22. VE = VERIFY
23. GF = GENERAL FUNCTIONS

For more information about any of these options select the number of the option

desired or press F to FORWARD to CS OVERVIEW.

2.3.2 CA Overview

CART SYSTEM permits library staff to identify book trucks and carts as temporary storage locations for items which have been checked in and are awaiting shelving. In CART SYSTEM, users may name carts, define their location, change their location, and erase and add items which are queued upon them awaiting shelving. Through the use of this feature, users may know the physical location of any available item in the library that is not on the shelf. During periods of high volume circulation, this feature can be of great value to both users and staff.

2.3.3 CX Overview

EXPENDIBLE ITEM is designed to keep records for those items which are in a sense "checked out" to patrons but for whom there is no associated due date. Examples of such expendible items might include journal articles which have been photocopied for a patron, or bibliographies which may have been compiled as a result of an on-line literature search.

2.3.4 CI Overview

CHECK IN is the process by which a patron is absolved from the responsibility of having checked out a given item. Items may be checked in immediately upon being returned, or they may be checked in at some later time when the circulation desk is not busy. After an item has been checked in, the patron is no longer responsible for the item.

2.3.5 CO Overview

CHECK OUT is the procedure used by the library to maintain control of its collection. This procedure permits patrons to use the items owned by the library while providing the library with information about which patrons hold specific items and when items are due to be returned to the library. CHECK OUT requires the following two pieces of information:

1. A Patron Identifier - A patron's full name registered in ILS or the bar code number for the patron, which is equal to the number ILS uses internally to identify the patron.

2. An Item Identifier - Any one of eight pieces of information about an item (e.g., title, author, call#) or the bar code number for the individual

item (a unique number for each piece) which ILS uses internally to identify the item.

2.3.6 IL Overview

The ILL function allows library staff to prepare an ALA-format form for use when lending or borrowing material through interlibrary loan. Users may add, edit, or delete forms for loaned or borrowed materials, and may update the record when the material is returned.

2.3.7 IS Overview

The ITEM STATUS function permits authorized users to view the status of any copy of any title in the Master Bibliographic File. It includes the following information.

1. Title of the item
2. Author of the item
3. Call number
4. ISBN/ISSN number
5. Number of times the item has been checked out and used in-house
6. Current status of the item (e.g., available for circulation, checked out, missing, etc.)
7. Status of other copies of the item, if desired.

2.3.8 ME Overview

MESSAGE

MESSAGE allows the library staff to attach a free-text message to the patron record or the item record. For example, a message attached to the item record might note torn or missing pages. A patron message could notify the patron that, e.g., the reference department had found information which he or she had requested earlier. Messages are automatically displayed whenever the record to which they are are attached is called up. These messages may be saved or deleted after being displayed.

2.3.9 MO Overview

Mail Out generates a mailing label to send an item in the library collection

to a patron. Both the patron and the item must be identified by the system to generate the correct label. The patron may be identified by id number, by name, as a library department, or by defining a new patron through patron registration. The item may be identified by one of eight identifiers or as the previously entered item which the system will identify for you.

2.3.10 NR Overview

NOTIFY RESERVE is used to keep track of the reserve requests made by each patron. Users may see a list of all patrons who have reserve requests in the system and the title of the item they have reserved. Users may selectively display the full reserve record for any patron by entering the number for that record as it appears on the list.

After a patron has been notified that the item has been returned, the user may delete the reserve request. ILS will update the status of the item to AVAILABLE.

2.3.11 PA Overview

PATRON ACTIVITY permits authorized users to view information about a patron's library activity, including

- titles currently checked out and due dates
- titles of any reserves being held for the patron
- titles on routing lists for the patron
- any messages attached to the patron record
- total items checked out by patron during current reporting period

PATRON ACTIVITY does not display address, telephone number, etc. To display these fields, use the PATRON STATUS function.

2.3.12 PD Overview

The PATRON DELETE function allows authorized users to delete patrons from the patron file.

2.3.13 PP Overview

PRINT PULL SLIPS is used to initiate ILS to begin printing out, on either a slave printer or a line printer, notices of items which are to be removed from the shelves. Items may be pulled for such reasons as binding, photocopying or to fulfill an interlibrary loan request.

2.3.14 PR Overview

PATRON REGISTRATION permits authorized users to add names to the list of registered borrowers or to edit information in the patron record (address, telephone number, etc) of an existing patron.

Registration - ILS displays a patron registration form on the screen. As the user enters information the cursor moves down the screen to the next prompt. Optional fields may be skipped by pressing RETURN.

Editing - Existing patron records can be edited by entering the patron's name in response to NAME:. When the patron has been identified ILS displays the original registration form (with the blanks filled in) and the user may now edit the record.

2.3.15 PS Overview

PATRON STATUS permits authorized users to view information in the patron record (e.g., address, phone number etc.) and information displayed by PATRON ACTIVITY (e.g., titles checked out, titles on reserve, etc.).

2.3.16 PU Overview

The PULL procedure is used to identify items that are to be removed from the shelf (e. g., periodicals to be bound). This module works like Message in that both patron and item records are flagged with a message. In this case, the message is to pull an item (which may be assigned to a library patron or department) from circulation.

2.3.17 RC Overview

RECALL is used to generate a printed recall notice to a patron, asking that an item currently checked out to her/him be returned to the library. The user is required to enter only item identification information.

2.3.18 RE Overview

An item may be renewed by a patron by telephone or when both the patron and the item are present at the library circulation desk. The item to be

renewed may be due that day, overdue, or even have some time left on the initial circulation period. Libraries vary in their policies on renewal. Depending on the type of patron, or whether the item was loaned via inter-library loan or not, the item may or may not be renewable. Some policies are:

- o Items may be renewed for an additional circulation period.
- o Items may be renewed, but only for a shorter period--one week rather than three.
- o Items may be renewed only once or they may be renewed indefinitely as long as there are no reserves.
- o No item may be renewed if it has been reserved for another patron.

Each ILS library will have to incorporate its local policies into RENEW.

2.3.19 RI Overview

RECEIPT CHECK IN is used whenever a patron specifies that a receipt be generated, itemizing what he has just returned to the library. This feature has been designed to accommodate those ILS sites where personnel regulations may require documentation of a clear account before final administrative action (i.e., final payroll tabulation, release of college transcripts) may be taken.

NOTE: The software required for this activity is currently being developed. It is expected that future ILS releases will include this module.

2.3.20 RV Overview

RESERVE enables users to either add, edit, or delete requests to reserve items. RESERVE can modify entries in either an item queue or patron queue. The item queue lists all the patrons who are waiting to check out a given item; the patron queue lists all the currently checked out items a given patron has asked the library to reserve.

RESERVE is used to alert users that another patron would like to check out an item that has just been checked in. RESERVE sets up a message in ILS, "ITEM IS ON RESERVE...ENTER 'C' TO CONTINUE, RETURN TO TERMINATE..." which signals the user that the patron requesting the reserve be told that the item has been returned. Local ILS sites may determine whether the item is to be checked out and sent to the patron requesting the reserve, or if a notice is to be sent advising that the reserve will be cancelled if the patron does not appear within, e.g., 3 days to check out the item.

2.3.21 SH Overview

The SHELF procedure records internal usage of an item. SHELF is normally used by a shelver who passes a barcode scanner over the barcode label of the item to identify it. SHELF enables the user to count the number of times an item has been taken off the shelf but not checked out.

When the ITEM STATUS option is used, ILS will display a statistical record of any item. One line of this display appears below:

CHECKED OUT IN THIS PERIOD:__ INTERNAL USAGE: __

When an item is identified in the SHELF function, the count of INTERNAL USAGE is increased by one.

Press 'F' and a RETURN to go forward to Step By Step Procedures for SHELF.

2.3.22 SS Overview

The SET STATUS function allows authorized users to associate one of the following exceptional statuses with an item:

- LOST
- FOUND (for previously LOST item)
- PATRON CLAIMS IT WAS RETURNED
- PATRON CLAIMS IT WAS LOST
- SNAG

If the status of an item has been set to one of the above, it is so noted in the Item Status display for that item. Subsequently doing a Check-out or Check-in of the item causes the Item Status record to be automatically updated.

2.3.23 VE Overview

VERIFY sets a switch in ILS which determines whether or not the patron name or item title is displayed when a library card or a barcode label is scanned.

1. VERIFY=ON - When a patron or an item ID number is entered into ILS (during CHECK OUT or CHECK IN for example), the computer will go to the magnetic disk which stores all item and patron information and find the complete record for that item or patron. The name or title is then sent to the terminal and displayed on the screen.

2. VERIFY=OFF - When a patron or an item ID number is entered into ILS, the computer will record the ID and continue with the transaction. The patron name or item title will not be displayed on the screen. ILS will find the complete record on the magnetic disk later, while the user continues with other transactions. This helps the system process transactions more expeditiously when there are alot of patrons waiting to be checked out.

NOTE: The VERIFY switch affects only the current terminal and session.

2.4 SERIALS CONTROL SUBSYSTEM

The Serials Control Subsystem is used to process all serial transactions including serials check in and routing of serials.

AVAILABLE INFORMATION

1. SCS OPTIONS
2. GLOSSARY OF THE ILS SYSTEM

For more information, select the number for the appropriate discussion.

2.4.1 SCS OPTIONS

The Serials Control Subsystem is composed of the following functions:

1. AR = ADD ROUTING
2. SC = SERIALS CHECK IN
3. GF = GENERAL FUNCTIONS

For more information, select the number for the appropriate discussion.

2.4.2 AR Overview

When journals are checked in via SERIALS CHECK-IN, routing slips for newly received issues may be printed. The ADD ROUTING function allows authorized users to add names to or delete names from the routing slip produced for a particular title. ADD ROUTING requires the user to identify the patron and the bibliographic item.

2.4.3 SE Overview

SERIALS CHECK IN enables library staff to maintain records of the receipt of each serial issue as it arrives in the mail. As an item is checked in, a barcode label may be generated for it, or the labels may be queued to be printed out in a batch at some later time.

Once the label has been affixed to the piece, it may be wanded whenever the

item is circulated. When items are returned from the bindery, a new label will have to be attached to the hardbound piece. Consequently, this label will supersede the labels which were originally placed on each loose piece.

SERIALS CHECK IN requires the user to identify, in addition to the item, the year, month, day, volume, issue, copy and loan length of the piece.

2.5 ADMINISTRATIVE SUBSYSTEM

The Administrative Subsystem is composed of options which enable authorized users to set various system parameters at local ILS installations. The local ILS system administrator will have responsibility for maintaining the security of these parameters, as the parameter settings represent a reflection of polic set by the library management. Consequently, only authorized users (i.e. those who have received either special training or authorization) should be expected to work in this subsystem.

The Administrative Subsystem is divided into 4 major sections:

1) AS Options
2) AS Overview
3) AS Special Features
4) ILS Glossary

For further information, select the number of the desired discussion above.

2.5.1 ADMINISTRATIVE SUBSYSTEM OPTIONS

There are 12 different options in the ADMINISTRATIVE SUBSYSTEM (AS). They are:

1. CP = CIRCULATION PARAMETERS
2. HM = HELP MAINTENANCE
3. JI = JOB INITIATION
4. JQ = JOB QUEUE
5. SA = SYSTEM ACTIVITY
6. SP = SYSTEM PARAMETERS
7. UD = USER DELETE
8. US = USER ADD/EDIT
9. VR = VIEW REPORTS
10. DO = DOWN SYSTEM
11. PQ = PATRON FILE DEFINITION
12. GF = GENERAL FUNCTIONS

For more information about any of these options select the number of the optio desired or press F to FORWARD to AS OVERVIEW.

2.5.2 CP Overview

CIRCULATION PARAMETERS EDIT is used to to set the time intervals for a variety of ILS functions. The time interval between e.g. successive overdue notice generation, would be determined by ILS site library management, and ILS would be set to conform to this policy. With this function, ILS staff can more effectively maintain bibliographic control over the collection, insofar as ILS 'remembers' to e.g. delete lost items from the Master Bibliographic File, or generate another overdue notice or search slip, after a specified time period.

Consequently, only authorized users should be allowed access to this function.

2.5.3 Introduction to the ILS Help Maintenance System

Background

Originally developed by the Lister Hill Center for Biomedical Communications (LHNCBC) in 1978, the ILS Help System (HE) was designed to provide online assistance when using the Integrated Library System. To provide such a capability, the Help Maintenance (HM) system was developed to serve as the means by which HELP text could be created and edited for user viewing. The current version of the Help Maintenance System is a melding of the best features of the original version and several enhancements to the system.

Although they extensively interact with each other, HM and HE are two distict entities. Whereas HE enables users to read text only, HM enables users to perform text manipulation. Access to HE is unrestricted. However, access to HM should be restricted to the ILS system administrator or other personnel authorized to change the system.

Purpose

The purpose of this manual is to document the use of the Help Maintenance System in sufficient detail to enable local ILS sites to work effectively with it.

Scope

The scope of this manual includes documentation of all currently operational features of Help Maintenance.

For further information select either discussion below:

2. Introducing Help Maintenance
3. Working in Help Maintenance

To exit Help Maintenance, return to COMMAND with a - and return and then enter / and some function abbreviation or /EXIT.

2.5.4 JI Overview

JOB INITIATION allows authorized users to generate and produce a variety of ILS notices and listings. E.g., users may print overdue notices, a list of current patrons, and other ILS reports. Users must identify the job they want to initiate and the production parameters by which it is to be produced (i.e., number of copies, time to start running the job, etc.).

2.5.5 JQ Overview

JOB QUEUE enables the authorized user to see the "line up" of jobs which are

in some stage of being processed. By identifying a job with a unique title, the user can find out where his or her job stands in relation to other jobs which are also "in the works".

2.5.6 SA Overview

SYSTEM ACTIVITY provides statistics on the cumulative number of check ins and check outs which have occurred on the current day. It also displays the number of both administrative and circulation terminals which are currently logged in, as well as the number of inactive terminals which are not currently logged in.

2.5.7 SP Overview

In SYSTEM PARAMETERS, authorized users may either activate or inhibit the operation of certain ILS features, such as the Cart System and the Verify option. This function also permits authorized users to change the priority of certain background filer programs so that they will process data at either a faster or slower rate, thus providing the user with a way of modulating the background load on the system, which in turns affects overall response time. This function also sets the maximum number of citations which can be printed at a public printer.

2.5.8 UD Overview

USER DELETE is used whenever a user is to be denied access to the ILS system. The system administrator, or some other authorized user, must make the deletion.

2.5.9 US Overview

USER ADD/EDIT is used whenever a new user is granted access to ILS. This procedure "identifies" the user to ILS and determines what areas of the system the user is allowed to access. This procedure also sets the user's experience level to either display or not display the range of options available to the user at any point in ILS.

2.5.10 VR Overview

The VIEW REPORTS function allows authorized users to view online activity reports for various activities within ILS. Users may obtain an on-line display of circulation and database activities for a variety of time periods.

2.5.11 DO Overview

DOWN SYSTEM provides a way for an authorized user to shut down the ILS system in a controlled manner when the computer hardware needs to be turned off or serviced. This function ends the transaction processing programs and sets the transaction and statistical files so they will be automatically restarted when ILS becomes available. Only system administrators should be authorized to use this function. An additional password is also required to run the DOWN SYSTEM function; this password is part of the program itself and should be set when ILS is installed initially.

2.5.12 PQ Overview

The library administrator uses PATRON FILE DEFINITION to identify the information to be recorded for each library patron. Certain patron data elements or questions are required for ILS operation, but the staff may add additional questions to properly describe the library's own patrons. Using PATRON FILE DEFINITION features, the library staff may define sets of questions which describe particular patron types, and may indicate the order in which those questions are to be asked during patron registration.

2.6 GENERAL FUNCTIONS

GENERAL FUNCTIONS is a collection of functions which may be used within any subsystem of ILS. For example they may be used while in either circulation or Administrative subsystems. Since these functions may be used throughout ILS, (subject to being specified as accessible in the user's profile) they have not been identified as being a part of any one subsystem. They are:

1. DETAIL
2. EXPERIENCE
3. HELP SYSTEM (for this subsystem)
4. PRINT BARCODE
5. PRINT TEMPORARY LABELS
6. TIME AND DATE

For more general functions information, select from the above options. For more subsystem information, enter / and the mnemonic for the desired subsystem. The subsystem mnemonics are:

AS = Administrative Subsystem
BS = Bibliographic Subsystem
CAS = Catalog Access Subsystem
CS = Circulation Subsystem
SCS = Serials Control Subsystem

2.6.1 General Concepts

The following GENERAL CONCEPTS are those which the user needs to know to work in the Integrated Library System. They are:

- the DISPLAY (D) command - displaying the full record of an entry

2. the FORWARD (F) command - forwarding through Item and Patron Lists

3. the BACK UP (B) command - backing up through tem and Patron Lists

4. the COMBINE (+) command - combining two instructions into one step

5. the TRAVEL (/) command - exiting out of a subsystem and into another or going to another activity within a subsystem

6. Item and Patron Lists - viewing item and patron records in ILS

7. VIPS statement - vol/issue/part/suppl item characteristics

2.6.2 Function Keys

Some terminals are equipped with what is known as function keys. These keys provide for quick entry of frequently used ILS commands. For example, a user could use a function key to display all the options available at any point by pressing the f1 key. This would be faster than having to enter a ? and a carriage return.

Other special function keys may be set to substitute for several characters having to be typed, thereby minimizing the chance of keying errors as well as saving time. All instructions which can be entered by special function keys, may also be entered using the REGULAR KEYBOARD of a CRT terminal. There are, in effect, two ways to enter any instruction; one with the special function key and one without. Function keys for ILS are currently set up as listed below. For more information about each, enter the number for that key:

1. ? key=option display
2. - key=go up
3. F key=go FORWARD
4. B key=go BACKWARDS
5. HELP key=HELP text
6. PREVIOUS PATRON
7. PREVIOUS ITEM
8. / key=exit a function

2.6.3 Identify Item

IDENTIFYING ITEMS WITH THE BARCODE SCANNER
Scanning the barcode is the fastest way to complete any transaction in ILS. Using the barcode wand eliminates the need for having to type in lengthy patron data, item data and the transaction symbols (e.g. /CO or /CI). By wanding over a coded version of these same data, ILS users will not experience the problems associated with miskeying this important information.
To identify an item using the barcode scanner, the user must first be sure that ILS is prompting the user with ITEM. At this point the user must put the point of the wand on the barcode label, and move the point of the wand over the pattern of black vertical lines. It does not matter if the wand moves from the left to right side or vice versa. Sometimes it helps if the wand is held directly over the item, instead of at a slant the way one would hold a pen. It is not necessary to scratch the barcode label. A light smooth stroke is all that is needed. Once ILS has recognized the item, it will respond by beeping once. This is to say, "I recognize this item!"

IDENTIFYING ITEMS WITHOUT A BARCODE SCANNER
It is sometimes the case that users either cannot or do not want to use the

barcode wand. Under these circumstances users may instead access the ILS Master Bibliographic File through alternate options. In response to the prompt ITEM, enter ? and a carriage return. ILS will display 8 access options and an additional option which affixes short messages to an item record. They are:

(NOTE: ONCE YOU'RE DONE READING AN ITEM IDENTIFICATION OPTION
ENTER A 'T' AND A RETURN TO GET BACK TO THIS DISCUSSION)

1. IID#= Item Identification #
2. AU = Author
3. CA = Call Number
4. IS = ISSN/ISBN
5. LC #= Library of Congress #
6. TK = Title Key
7. AT = Author/Title Key
8. SE = Series
9. MI = Message (for item just entered)

2.6.4 Identifying the Patron

Any and all ILS functions involving patron data require that the patron be accurately identified in the ILS. A patron may be identified by either wanding the barcode on his library card, or entering the equivalent barcode number or the patron's last name. (If the wand is not used, enter the patron's last name instead of the barcode number to avoid typing mistakes.)

PATRON IDENTIFICATION OPTIONS

NAME-This is the most common way to enter the patron data. Enter the full last name or enough characters of the last name to narrow the list down sufficiently to display the desired patron entry. If there are more than 5 matches, ILS will say (THERE'S MORE) and the user may then press F or B to view additional entries that match. If the 5th entry seems to be the correct one, press F to be sure that the 6th or 7th ones are not identical names. To see more information for a patron in the list, enter D followed by the index number beside the patron's name. For example, if you had a list like:

1 JONES, JOHN B.
2 JONES, JOHN D.
3 JONES, JOHN D.
4 JONES, JOHN F.
5 JONES, JOHN R.

and you wanted to display more information from John D. Jones' record to select the correct entry, you could enter D2 or D3 to view further information from the patron record to accurately identify the patron from the list.

Once you're sure that you've found the correct entry, enter the index # which appears in the first column in response to the prompt PATRON:.

PATRON ID #- The Patron ID # is equivalent to the bar code configuration which appears on each patron's library card. It is made up of numbers and other characters which are transformed into a pattern of thick and thin lines and spaces which together make a code to identify both items and patrons. A patron may be identified by this code; however, it is suggested that the staff use the

wand or type in the patron name whenever possible, thereby minimizing the chance of a typing error.

PATRON REGISTRATION - If the patron is not already registered in the patron list, it will be necessary to enter his or her patron data into the system before any transaction can be recorded into ILS. Local ILS sites may devise their own procedures for gathering patron information, putting it into the system at some later time. For a fuller discussion of patron registration refer to the path PATRON REGISTRATION. Enter /PR to get to this discussion

2.6.5 ILS System Glossary

The ILS System Glossary functions to provide users with an on line dictionary of key concepts and terminology used in ILS discussions. This glossary is accessible from any subsystem within the HELP System. Local ILS sites may wish to add additional vocabulary into the glossary, or redefine some of the definitions given. This may be done in Help Maintenance using the instructions E G (edit glossary) or A G (add to glossary). For a more detailed discussion of how to work with the glossary see section 3.5 of the Help Maintenance Manual Working in the Glossary.

To look up a term in the glossary, enter GL in response to the HELP prompt CHOICE >. ILS will reply ENTER THE TERM TO BE DEFINED. The glossary will accept either a full or truncated word. If there should be a match to more than one word, ILS will display all the words that match. The user may then select by id # the desired term. ILS will then display the definition for that term, and will ask the user for the next term to be defined. To return to HELP, enter a ^ (up arrow) and a return. ILS will redisplay the exact screen where you were.

2.6.6 HELP System

The HELP System is an on-line, computer assisted tutuorial designed to teach library staff how to perform any subsystem function within ILS. Users may read increasingly detailed information about any subsystem by traveling along the subsystem path, selecting from the options given at the end of each paragraph, or they may travel across subsystem discussions by entering / followed by the mnemonic of a different susbsystem. The subsystem mnemonics are:

AS = Administrative Subsystem CS = Circulation Subsystem
BS = Bibliographic Subsystem SCS = Serials Control Subsystem

To view HELP text for any of the above subsystems, enter / followed by the appropriate mnemonic.

2.6.7 PB Overview

The PRINT BARCODE procedure permits authorized users to print barcodes for items or patrons. Usually a barcode label will be produced for an item during the NEWLY CATALOGED ITEM procedure and a label will be produced for a patron during PATRON REGISTRATION. If a duplicate label is needed, PRINT BARCODE will produce it for items which have records in the Master Bibliographic File (MBF)

or patrons already registered in the system.

PRINT BARCODE gives the user 3 alternatives:

I - Will print a defined item.

P - Will print a defined patron.

E - Will start batch printing.

For HELP on these choices enter 'F' and a RETURN.

2.6.8 PT Overview

PRINT TEMPORARY LABELS permits authorized users to produce temporary barcode labels using the barcode printer. Temporary labels would normally be used when a library is first converting its records to machine-readable form or if the library wishes to circulate an item before it is processed. A temporary label might also be used on a book obtained through inter-library loan.

A temporary label is a barcode label that contains only an identification number. The barcode printer will produce two copies of each label, one for the item and one for the item card.

Press 'F' and a RETURN to get to Step By Step procedures for PRINT TEMPORARY LABELS.

2.6.9 DE Overview

DETAIL requires users to choose between the ON and the OFF setting, each of which is explained below.

If you choose ON - ILS will display all options at each point in the session. If users are experienced (they usually DO NOT have the options displayed for them), choosing ON will mean that ILS WILL DISPLAY ALL options for the current session. The next time these users use ILS, the options will not be shown

If you choose OFF - ILS will not display options for each point in the session. If a user is an inexperienced user, (they usually DO have the options displayed for them) choosing OFF will mean that ILS WILL NOT DISPLAY ALL options for the current session. The next time these users use ILS the options will be shown.

NOTE: To permanently reverse a user's experience level see EXPERIENCE.

2.6.10 EX Overview

EXPERIENCE records each user's experience level using ILS. It is linked to the user's password and can only be set by the system administrator. There are two EXPERIENCE settings:

1. EXPERIENCE=OFF - This option is for users who are not experienced with ILS With EXPERIENCE=OFF ILS will automatically list the selection options available at every point in ILS.

2. EXPERIENCE=ON - This option is for users who are experienced with ILS. With EXPERIENCE=ON ILS will not automatically list the selection options available at every point in ILS.

NOTE: Experienced users may still view ILS options at any point by entering a ? followed by a return. Should it ever become necessary to temporarily reverse a user's experience level, DETAIL can be used. For more information on DETAIL enter /DE.

2.6.11 TIME AND DATE

THE TIME & DATE option tells the user the correct time and current date as it is known within the ILS computer. The computer has a built in clock and calendar, and it can supply users with the correct time and date very easily.

To find out either the correct time or date, the user must enter TD or /TD (the / is only necessary if you are in the middle of some other function) ILS will respond by displaying the current date and time. The display will remain on the screen for several seconds; then ILS will take the user back to the last transaction before going to TIME & DATE.

3 DETAILS OF ILS FUNCTIONS

3.1 DETAILS OF SUBSYSTEM FUNCTIONS

The next section provides a detailed explanation of each function in each ILS subsystem. The subsystems and functions are described in the same order in which their Overviews appeared in the preceding section. This section is intended primarily for reference when explicit instructions are needed.

4 BIBLIOGRAPHIC SUBSYSTEM

4.1 BS INTRODUCTION

4.1.1 BIBLIOGRAPHIC SUBSYSTEM

The Bibliographic Subsystem is a collection of functions which enable authorized users to build and maintain the Master Bibliographic File and associated authority files and indexes.

AVAILABLE INFORMATION

1. BS OPTIONS
2. GLOSSARY FOR THE ILS SYSTEM

For more information, select the number for the appropriate discussion.

4.1.2 BS OPTIONS

The Bibliographic Subsystem functions, which allow authorized users to create and maintain bibliographic information, are:

1. TAG ADD/EDIT	7. LIST INDICATORS	13. EDIT ITEM
2. OUTPUT TAGS	8. PROCESS OCLC TAPE	14. ITEM DELETE
3. FIND WORDS IN TAGS	9. DISPLAY TAPE OUTPUT	15. DICTIONARIES
4. PRIORITY GROUPS	10. WORKSPACE ADD/DELETE	16. GENERAL FUNCTIONS
5. SELECTION STRATEGIES	11. EDIT WS RECORDS	17. CATALOG REVIEW
6. INDICATORS ADD/EDIT	12. NEWLY CATALOGED ITEM	18. AUTHORITY MAINTENANCE
		19. BIBLIOGRAPHIC ADD/EDIT

For HELP with any of these functions, enter the number:

4.2 BIBLIOGRAPHIC ADD/EDIT

4.2.1 BI Overview

BIBLIOGRAPHIC ADD/EDIT allows users to input bibliographic records locally using a flexible online cataloging work form. This feature is under development and is not operational as of July 1981. Until this capability is completed library staff should use the NEWLY-CATALOGED ITEM function to input records

from the terminal.

4.3 TAG ADD/EDIT

The TAG ADD/EDIT function enables authorized users to ADD to the list of MARC tags contained in ILS or to EDIT the list. For information in greater detail than can be provided here users are referred to Lister Hill Contractor Report CR 80-02, "A USER'S GUIDE TO MAINTAINING THE MASTER BIBLIOGRAPHIC FILE OF THE INTEGRATED LIBRARY SYSTEM" by Sandy E. Anderson, MITRE Corporation.

AVAILABLE INFORMATION

1. Overview of TAG ADD/EDIT
2. Step by Step Procedures For TAG ADD/EDIT
3. Special Features for TAG ADD/EDIT

Please enter the number of the type of information you desire:

4.3.1 TA Overview

ILS contains a list of all tags currently recognized as part of the MARC record. The TAG CREATE/EDIT function enables authorized users to ADD to the list of MARC tags as new tags are authorized or to create local tags as needed using the range of tag 'numbers' from AAA-ZZZ. TAG CREATE/EDIT also allows authorized users to EDIT existing tags.

For more HELP with CREATING or EDITING tags go FORWARD to Step By Step.

For more information on the AAA-ZZZ tag 'numbers' go FORWARD twice to Special Features.

4.3.2 TA Step By Step

The TAG CREATE/EDIT option enables the user to:

1. Create a Tag - Add to the list of MARC tags contained in ILS.
2. Edit a Tag - Edit an existing tag or subfield.

Each alternative has its own step by step procedure.

For more HELP enter the number of the desired choice or FORWARD to SPECIAL FEATURES:

4.3.2.1 TA Create a Tag

To Create a Tag in the ILS list the user should enter the function 'OC' for OCLC TAPE PROCESSING, select the option 'T' and follow this sequence of steps.

ILS will prompt:	User should enter:
TAG:	3 digits or 3 alphabetic characters not currently used in the MARC format.
NAME:	Name of the new tag (up to 60 characters).
MIIS NODE:	1 or 2 character printable ASCII symbol (!, %A). If RETURN is entered, the MIIS node is to the tag number (050,245,etc.).
INDEXED? NO/	'Y' for YES or RETURN for NO.
# REPEATS /	Any number from 1-99.
ILS will prompt:	User should enter:
USED LOCALLY? YES/	'N' for NO or RETURN for YES.
SUBFIELD CODE:	Lowercase letter which may have a subscript added. (a, a1, a2, d)
NAME:	Name of the new subfield (free text up to 35 characters).
TYPES:	Any combination of the digits 1-6. These correspond to the following item types: 1. Serials 3. Audiovisual 5. Music 2. Books 4. Maps 6. Manuscripts
INDEXED? NO/	'Y' for YES or RETURN for NO.
ILS will prompt:	User should enter:
VALIDATION CRITERIA:	Authority for the existence of this subfield (free text up to 80 characters).
SUBFIELD CODE:	ILS will now repeat the procedure for adding a subfield code. If the user enters a RETURN here ILS will prompt:
TAG:	The user may now begin the process again and create another tag or enter RETURN and ILS will prompt:
OPTION:	The user is now at the first step of OCLC TAPE PROCESSING.

4.3.2.2 TA Edit a Tag

To Edit a Tag in the ILS list the user should enter the function 'OC' for OCLC TAPE PROCESSING and select the option 'T'. ILS will prompt TAG: and the user should enter the 3 characters which identify the tag (050,245,etc.). ILS will display the complete header of the tag and the first subfield. For example:

```
.....................................................................
OCLC TAG: 350       NAME: SUBSCRIPTION / BIBLIOGRAPHIC PRICE

MIIS NODE: "2"      INDEXED: NO         # REPEATS: 1        LOCALLY USED: YES

                                          TYPE
SUB                                  (1) (2) (3) (4) (5) (6)
FLD  NAME                            SER BKS A/V MAP MUS MAN    INDEX    LOCAL

a    SUBSCRIPTION PRICE               Y                                   Y

**** ENTER COMMAND >
.....................................................................
```

The user may press RETURN to display the next subfield code or choose one of the 8 options below.

1) - to Edit Another Tag
2) E to Edit Subfield Data
3) H to Edit Heading for [this] Tag
4) L to Set Local Usage
5) I to Index on this Subfield Code
6) D to Delete this Subfield
7) N to Input a New Subfield
8) A to Select Another Subfield

For more HELP enter the number of the desired option:

4.3.2.2.1 TA Edit Another Tag

The '-' option of TAG CREATE/EDIT allows the user, while still in the edit mode, to move to another tag and edit it. ILS will display the tag header and the first subfield and prompt ENTER COMMAND>. If the user enters '-':

ILS will prompt:	User should enter:
LIST TAGS FROM 000/	ILS allows the user to view and edit a series of tags. Enter the first tag number here. (e.g. 050)
THRU ZZZ/	To view only one tag, enter the same number here. (ie. 050). To view several tags, enter the number of the last tag in the series (e.g. 060 means that ILS would display all tags from 050 to 060).

ILS will display the first tag header and its first subfield. The user is now in edit mode and may choose one of the 8 editing options.

4.3.2.2.2 TA Edit Subfield

The 'E' option of TAG CREATE/EDIT allows the user to edit the subfield codes within a MARC tag. ILS will display the tag header and the first subfield code. The user may enter RETURN to move to the next subfield, 'A' to skip to another subfield, or 'E' to EDIT the subfield displayed.

ILS will prompt:	User should enter:
SELECT ELEMENT OF SUBFIELD TO BE MODIFIED >	'D' - to DELETE the subfield 'N' - to edit the NAME of the subfield 'T' - to edit TYPE codes 'I' - to edit INDEX field 'L' - to edit LOCAL USAGE field

For more information on these 5 options, press RETURN:

'D' - allows the user to DELETE the subfield. When 'D' is entered ILS displays:

DELETE SUBFIELD CODE [a,c,c1] FOR TAG [this tag #]? Y OR N >

If the user enters 'Y' ILS will delete the subfield and display:

SUBFIELD CODE [a,c,c1] HAS BEEN DELETED FOR TAG [this tag #]

If the user attempts to delete the only subfield for a tag, ILS will ask if the entire tag is to be deleted. A tag cannot exist without at least one subfield code within it.

'N' - allows the user to edit or change the NAME of the subfield. When 'N' is entered, ILS will display the name. Consider the following subfield error:

NUMBER OR NUBERATION

ILS will prompt:	User should enter:
REPLACE>	'UB' - notice that, to remove the 'B' from NUBERATION, the user must identify which 'B' is to be replaced. There is only one 'UB'
WITH>	'UM' - this will finish the process and convert NUBERATION to NUMERATION.

'T' - allows the user to edit the TYPE codes. ILS will display the type codes to which the subfield currently applies. ILS will then prompt 'REPLACE >' and 'WITH >'. The user should follow the same procedure as for 'N' above.

'I' - allows the user to change the INDEXED setting. ILS will display:

SUBFIELD IS PRESENTLY SET TO BE INDEXED-ENTER N TO ELIMINATE INDEXING >

OR

SUBFIELD IS NOT NOW INDEXED-ENTER Y TO INDEX THIS SUBFIELD >

'N' will remove the 'Y' in the INDEX column of the tag.

'Y' will permit this subfield code to be indexed and ILS will automatically enter YES in the INDEXED field of the tag header.

'L' - allows the user to change the LOCAL USAGE setting. ILS will display:

SUBFIELD [a,c,c1] NAMED [name of subfield] IS NOW USED LOCALLY - ENTER N TO ELIMINATE LOCAL USE>

OR

SUBFIELD [a,c,c1] IS NOT CURRENTLY USED LOCALLY - ENTER Y TO SET LOCAL USAGE>

'N' will remove the 'Y' in the LOCAL column of the tag AND a 'Y' in the INDEX column.

'Y' will add a 'Y' to the LOCAL column of the tag.

For information on editing tag header data 'F' and RETURN.

4.3.2.2.3 TA Edit Heading

The 'H' option of TAG CREATE/EDIT allows the user to edit the header of the MARC tag.

ILS will prompt:	User should enter:
ENTER COMMAND>	'H' - ILS will display the header again.
SELECT TAG ELEMENT TO BE CHANGED>	'N' - to edit the NAME of the tag 'M' - to edit the MIIS MODE 'I' - to change the INDEXED setting 'R' - to edit the REPEAT count 'L' - to change the LOCAL USAGE switch 'D' - to DELETE the tag altogether

For more information on these 6 options, press RETURN:

'N' - allows the user to edit or change the NAME of the tag. When 'N' is entered, ILS will display the name. For example:

SUBSCRIPTION / BIBLIOGRAPHIS PRICE

ILS will prompt:	User should enter:
REPLACE>	'IS' - notice that, to remove the 'S' from BIBLIOGRAPHIS, the user must identify which 'S' is to be replaced. There is only one 'IS'.
WITH>	'IC' - this will finish the process and convert BIBLIOGRAPH to BIBLIOGRAPHIC.

'M' - allows the user to edit or change the MIIS NODE. ILS will display the MIIS NODE and then prompt REPLACE>. The user can follow the sequence described above.

'I' - allows the user to change the INDEXED setting. ILS will display:

TAG [this tag #] IS PRESENTLY INDEXED-ENTER N TO ELIMINATE INDEXING>

OR

TAG [this tag #] IS NOT PRESENTLY INDEXED-ENTER Y TO PERMIT INDEXING>

If the user enters 'N' ILS will remove any 'Y's in the INDEX column of the tag.

If the user enters 'Y' to permit indexing, ILS will automatically enter a 'Y' in the 'a' subfield. The user may eliminate this 'Y' by editing the subfield data (press 'T' and read about option 'E' on editing).

'R' - allows the user to change the number of REPEATS. ILS will prompt:

TAG [this tag #] HAS [1] REPEAT, ENTER THE NEW # OF REPEATS >

The user may enter any number from 1 to 99 or a BLANK for a non-repeatable tag.

'L' - allows the user to change the LOCAL USAGE switch. ILS will display:

TAG [this tag #] IS USED LOCALLY AT PRESENT - ENTER N TO ELIMINATE FURTHER LOCAL USE>

OR

TAG [this tag #] IS NOT USED LOCALLY - ENTER Y TO PERMIT LOCAL USAGE>

'D' - allows the user to DELETE a tag from the ILS list. ILS will prompt:

YOU WANT TO DELETE TAG [this tag #] ? ENTER Y OR N >

If the user enters 'Y', ILS will respond:

TAG [this tag #] HAS BEEN DELETED.

For information on editing subfield data press 'T' and RETURN.

4.3.2.2.4 TA Set Local Usage

The 'L' option of TAG CREATE/EDIT allows the user to change the LOCAL column of the subfield from BLANK (not locally used) to Y (this subfield locally used). It will not work in the other direction. To eliminate local usage of a subfield the user must choose the 'E' option.

If the user enters 'L' to indicate local usage, ILS will enter a 'Y' in the LOCAL column of this subfield, display the revised subfield, and prompt ENTER COMMAND >. The user may choose another option or press RETURN to move to the next subfield.

4.3.2.2.5 TA Index on this Subfield

The 'I' option of TAG CREATE/EDIT allows the user to change the INDEX setting of the subfield from BLANK (not indexed) to Y (this subfield indexed). It will not work in the other direction. To eliminate indexing of a subfield the user must choose the 'E' option.

If the user enters 'I' to permit indexing, ILS will enter a 'Y' in the INDEX column of this subfield, display the revised subfield, and prompt ENTER COMMAND >. The user may choose another option or press RETURN to move to the next subfield.

4.3.2.2.6 TA Delete This Subfield

The 'D' option of TAG CREATE/EDIT allows the user to delete a subfield from the ILS list. ILS will display the tag header and the first subfield. The user may press RETURN to move to the next subfield or 'A' to skip to another subfield. If the user enters 'D' in response to ENTER COMMAND>:

ILS will prompt:	User should enter:
DELETE SUBFIELD CODE [a,c,c1] FOR TAG [this tag #]? Y OR N >	'N' - allows the user to cancel the deletion. or 'Y' - subfield is deleted, ILS displays:

SUBFIELD CODE [a,c,c1] HAS BEEN DELETED FOR TAG [this tag #]

If there is only one subfield code associated with the tag being edited and the user attempts to delete it:

ILS will prompt:	User should enter:
THIS IS THE ONLY SUBFIELD FOR TAG [this tag #]. DELETE ENTIRE TAG? NO/	RETURN - allows the user to cancel the deletion. or 'Y' - deletes the entire tag.
TAG [this tag #] HAS BEEN DELETED	

4.3.2.2.7 TA Input New Subfield

The 'N' option of TAG CREATE/EDIT allows the user to insert a new subfield under any tag. The user should enter 'N' in response to ENTER COMMAND

ILS will prompt:	User should enter:
SUBFIELD CODE:	Lowercase letter which may have a subscript added. (a, a1, a2, d)
NAME:	Name of the new subfield (free text up to 35 characters).
TYPES:	Any combination of the digits 1-6. These correspond to the following item types:

1. Serials
2. Books
3. Audiovisual
4. Maps
5. Music
6. Muscripts

ILS will prompt:	User should enter
INDEXED? NO/	'Y' for YES or RETURN for NO
VALIDATION CRITERIA:	Authority for the entries in this subfield (free text up to 80 characters

ILS will display the new subfield and prompt ENTER COMMAND. The user may edit the new subfield, press RETURN to edit the next subfield, enter 'A' to skip to another subfield, or enter '-' to edit another tag.

4.3.2.2.8 TA Select Another Subfield

The 'A' option of TAG CREATE/EDIT allows the user, while still in the edit mode, to move to another subfield and edit it. ILS will display the first subfield of the tag and prompt ENTER COMMAND. If the user enters 'A':

ILS will prompt:	User should enter:

SUBFIELD CODE: Subfield code in lowercase letters. (a,c,c1)

ILS will then display the subfield requested and allow the user to edit it. This feature is especially useful when editing a tag with many subfields.

3.3 TA Special Features

ILS allows users to create tags using tag 'numbers' AAA - ZZZ. These tags can contain any information which the library wishes to store in the item record. Tags may contain cataloging information for audiovisual hardware and anatomical models or detailed records of provenance for rare books and art objects.These tags may be created in the local database using the TAG ADD/EDIT function of the Bibliographic Subsystem.

4.4 OUTPUT TAGS

The OUTPUT TAGS (OT) function allows authorized users to display or print information from bibliographic tags in the Item Tag Dictionary.

AVAILABLE INFORMATION

1. OT Overview
2. OT Step by Step
3. OT Special Features

For more detailed HELP, press the number of the desired option.

4.4.1 OT Overview

The OUTPUT TAGS (OT) function allows authorized users to display or print out information from bibliographic tags in the Item Tag Dictionary. The entire Dictionary or selected portions may be displayed. For each tag specified, a chart of information about that tag is displayed, including such information as the tag name, whether it is locally used, if it is indexed, # of repeats per record, the MIIS node, what all its valid subfields are, and for which types of materials each subfield is appropriate. For more information about the Item Tag Dictionary, see the HELP text for Item Tag Dictionary in the DICTIONARIES (DC) function.

4.4.2 OT Step By Step

Upon entering OT, ILS displays:

PRINT TO DEVICE: 0/ User enters <Return> for 0, indicating that output will be listed at the terminal which the user is presently using. Any other output device may be indicated by entering its device number.

In the Item Tag Dictionary, tags are arranged as follows: numeric tags in increasing numeric order, followed by alpha tags in increasing alpha order. ILS now prompts the user to specify which tags to list.

LIST FROM TAG: 000/ User enters <Return> to begin listing tags starting with tag 000 (i.e, the first tag). To begin listing with some other tag, user enters the three character tag code.

LIST THRU: ZZZ/ User enters <Return> to indicate that tags should be listed through tag ZZZ (ie., the last tag). To indicate that listing should stop at a specified tag, user enters the three character code of the tag at which listing should stop.

ILS now asks the user which category of tags she/he wishes to list.

LIST ILS TAGS ONLY, OR NON-ILS TAGS ONLY, OR ALL TAGS? (I OR N OR A):

The user enters 'I' to list only ILS tags, 'N' to list only non-ILS tags, or 'A' to list all tags within the range previously specified. ILS then displays a chart of information about each tag specified.

OCLC TAG: 100 NAME: ESTABLISHED HEADING - PERSONAL NAME
MIIS NODE: "" INDEXED: YES # REPEATS: LOCALLY USED: YES

SUB		MATERIAL TYPE (1)	(2)	(3)	(4)	(5)	(6)		
FLD	NAME	SER	BKS	A/V	MAP	MUS	MAN	INDEX	LOCAL
a	NAME	Y	Y	Y	Y	Y	Y	Y	Y
b	NUMBER OR NUMERATION	Y	Y	Y	Y	Y	Y	Y	Y
c	TITLES AND OTHER WORDS ASSOCIA	Y	Y	Y	Y	Y	Y	Y	Y
d	DATES(S)	Y	Y	Y	Y	Y	Y	Y	Y
e	RELATOR	Y	Y	Y	Y	Y	Y		Y
	(etc. for rest of subfields)								

4.4.3 OT Special Features

As of 3/81, there are no known Special Features of OUTPUT TAGS.

4.5 FIND WORDS IN TAGS

The FIND WORDS IN TAGS (FW) function allows users to search the Item Tag Dictionary for the occurrence of specified words in the names of the bibliographic tags or their subfields.

AVAILABLE INFORMATION

1. FW Overview
2. FW Step by Step
3. FW Special Features

For more detailed HELP, press the number of the desired option.

4.5.1 FW Overview

The FW function (Find Words in Tags) allows authorized users to search the Item Tag Dictionary for tags containing a specified word(s) in the tag name or in subfield names. Thus, it is useful for pulling together a list of all tags containing a common word(s), e.g., all tags whose tag or subfield names contain the word 'date'. For more information about the Item Tag Dictionary, see HELP text for the function DICTIONARIES.

4.5.2 FW Step By Step

Upon entering FW, ILS first prompts for the word which the user wishes to search for. ILS then allows the user to refine the search by entering additional search terms and utilizing the Boolean operators OR, AND, and AND NOT. Any number of Boolean operators may be used in a search. Lastly, ILS allows the user to include or exclude specific tags in the output display, regardless of the relationship of the tag to the actual search terms entered. ILS displays:

```
SEARCH FOR WORD:
  OR WORD:
AND FOR WORD:
  OR WORD:
AND NOT WORD:
  OR WORD:
SPECIFICALLY INCLUDE TAG:
  FOR TAG x  SPECIFICALLY INCLUDE SUBFIELD:
SPECIFICALLY EXCLUDE TAG:
```

In response to each prompt, user enters a word. If a particular Boolean operator is not to be used in a particular search, the user enters <Return> to progress to the next category until search specification is complete.

Using the specified search terms in the manner specified by the Boolean operators, ILS searches the Item Tag Dictionary to locate matches. ILS looks for any literal match, even if it is embedded in a larger term. Thus, if the user searches for 'TI', ILS will display all tag and subfield names which contain the word 'TITLE' or 'INSTITUTION' (and maybe others). While ILS is searching, ILS displays:

```
SEARCHING...
```

When a match is found, the tag number and tag name are displayed; if the

match is a subfield name, that subfield code and subfield name are also displayed. After the search in complete, the user is prompted for a new search term.

4.5.3 FW Special Features

As of 3/81, there are no known Special Features of the FW function.

4.6 PRIORITY GROUPS

Some items of bibliographic information may appear in several different OCLC tags, e.g., call numbers in tags 090,099 and 150. The PRIORITY GROUPS function allows a library to group these similar tags such that only one of them is extracted from the OCLC tape and carried into the workspace for further processing.

AVAILABLE INFORMATION
1. PG Overview
2. PG Step by Step
3. PG Special Features

For more detailed HELP, press the number of the desired option.

4.6.1 PG Overview

Some items of bibliographic information may appear in several different OCLC tags. E.g., call numbers may be in tags 090,099 and 150. Such a set of tags may be included in a single Priority Group so that only one of the tags in the PG is actually extracted from the OCLC tape. ILS extracts the bibliographic information for an item from the OCLC tape by searching for the data in a specified tag order ('prioritized') or by extracting data from the first found tag ('don't care'). The PRIORITY GROUPS function allows authorized users to define these Priority Groups. This definition consists of naming the tags which belong to the PG in question and defining their priority for selection (if any).

Priority Groups influence the movement of bibliographic data from OCLC tape into a workspace. Thus, it is during the creation of Selection Strategies that use of particular Priority Groups is specified.

4.6.2 PG Step by Step

Upon entering PG, ILS displays:

GROUP: By entering the appropriate response, user may choose to

1. Edit or delete existing Priority Group (User enters GROUP#)

2. List all existing Priority Groups (User enters 'LIST')

3. Create a new Priority Group (User enters 'NEW')

For more detailed HELP, enter the number of the desired option.

4.6.2.1 PG - Group#

As of 3/81, this function does not work. Entering a GROUP# causes

ILS to display '????' and prompt for another GROUP#.

4.6.2.2 PG - List

Upon entering 'LIST' in response to the prompt 'GROUP:', ILS lists all existing Priority Groups, including the number and name of each PG as well as the tags included.

4.6.2.3 PG - New

Upon entering 'NEW' to the prompt 'GROUP:', ILS assigns the next sequential number to the new PG and displays:

GROUP: 'assigned number'
DESCRIPTION: User enters a descriptive name of 40 characters or less.
PRIORITIZE OR DON'T CARE: P/ User enters <Return> if tags in the PG are selected in a prioritized order as indicated by the order in which tags are named below. User enters 'D' for DON'T CARE if it makes no difference which tag is actually extracted. In that case, the tag with the lowest tag number which contains data is extracted.
TAGS: User enters the 3-digits tags constituting this PG, separated by commas.

4.6.3 PG Special Features

As of 3/81, there are no Known Special Features of PG.

4.7 SELECTION STRATEGIES

The SELECTION STRATEGIES (SS) function allows authorized users to create, edit, list, and delete Selection Strategies. Selection Strategies are used to establish criteria for extraction of records from a tape into an ILS workspace.

AVAILABLE INFORMATION

1. ST - Overview
2. ST - Step by Step
3. ST - Special Features

For more HELP, press the number of the desired option.

4.7.1 ST Overview

Selection Strategies are utilized during the initial processing of OCLC tapes, source authority tapes, or any other MARC tape. The library establishes one or more Selection Strategies (SS) to define criteria for selecting which records, and which fields and subfields from those records, are stripped off the tape and read into a workspace for further processing. While in the workspace, records may be displayed and/or edited. Records may then be moved from the workspace into the Master Bibliographic File (MBF), according to the tag definitions in the Item Tag Dictionary. Such an approach allows a library to: 1) optionally create subsets of records rather than dealing with the total number of records on a particular tape at one time, e.g., in order to process records for monographs separately from records for other types of materials; and 2) to read into a temporary workspace more information about a record than will be incorporated into the permanent MBF, e.g., in order to look at the full MARC record in the workspace before loading a possibly abbreviated record into the MBF.

The SELECTION STRATEGIES (ST) function allows authorized users to create, edit, list, and delete Selection Strategies (SS). An SS (1) describes the bibliographic attributes and indicator criteria of records to be input to the workspace from a bibliographic or source authority tape and (2) describes the elements (i.e., fields and subfields) to be input from qualifying records. Bibliographic attributes include information in the fixed fields, such as status codes, type of record code, bibliographic level code, record completeness code, and descriptive cataloging code. For more detailed information than can be presented in HELP, see Susan G. King's A Guide to Using the Bibliographic Features of the Integrated Library System (ILS), MITRE Corporation, March 1980.

4.7.2 ST Step by Step

Upon entering SELECTION STRATEGIES, ILS displays:

FOR AUTHORITY Y/ If the user wishes to work with Selection Strategies for source authority records on tape, user enters

<Return> for YES. If the user wishes to work with Selection Strategies for bibliographic records on tape, user enters 'N' for NO. The procedures which follow are similar for both types of records, although allowable responses to particular questions may vary.

SELECTION STRATEGY#: User enters one of the following to indicate which activity s/he wishes to perform.

1. SS# (User enters '#'). User may edit or delete the specified SS.
2. SS#/DISPLAY (User enters '#/DISPLAY'). ILS displays all the bibliographic attributes and tags defined for this SS.
3. LIST (User enters 'LIST'). ILS displays the names and numbers of all defined SSs pertaining to the type of record specified above, along with the bibliographic attributes of each.
4. NEW (User enters 'NEW'). The user may create a new SS.

For more detailed HELP, press the number of the desired option.

4.7.2.1 ST - SS#

Upon entering the number of an existing SS, ILS begins to list information about that SS and allows the user to change it if desired. The following information is displayed:

1. INDICATOR CRITERIA?
2. NAME: (includes DELETE capability)
3. STATUS CODE:
4. TYPE OF RECORD CODE:
5. BIBLIOGRAPHIC LEVEL CODE:
6. RECORD COMPLETENESS CODE:
7. DESCRIPTIVE CATALOGING CODE:
8. TAG SELECTION:
   FOR TYPE:

For more detailed HELP, press the number of the desired option.

4.7.2.1.1 ST-#-Indicators

Indicator criteria may be defined which ILS uses to select particular records. As of 3/81, this function operates rather obscurely in SELECTION STRATEGIES, so the following information may not be complete. ILS displays:

INDICATOR CRITERIA? NO/ User enters <Return> for NO if indicator

criteria are not defined. User enters 'Y' for YES if s/he wishes to define indicator criteria. ILS then verifies the name and number of the specified SS and lists the types of materials included in that SS, e.g.,

DEFINED TYPE FOR SS# '3' 'NAME3' IS 1,2, This means that SS3, named 'NAME3' selects bibliographic records of TYPE 1 (serials) and TYPE 2 (monographs).

ILS then requires the user to specify for which TYPE and which TAG s/he is defining indicator criteria.

FOR TYPE: User enters a valid TYPE. For bibliographic records, TYPE may assume the following values: (1)SER (2)BKS (3)A/V (4)MAP (5)MUS (6)MAN. For authority records, TYPE may assume the following values: (7)authority name/title heading (8)authority uniform title heading (9)authority name heading (10)authority subject heading.

FOR TAG: User enters a valid TAG.
ONLY INCLUDE THESE TAGS IF...
1ST INDICATOR IS: User enters indicator value on which to select.
AND 2ND INDICATOR IS: User enters indicator value on which to select.

ILS then allows the user to define indicator criteria for another TYPE and TAG. When the user enters a <Return> in response to the FOR TYPE: prompt to indicate the s/he is finished establishing indicator criteria, ILS stores the indicator criteria in the appropriate SS and responds with:

DONE!!

As of 3/81, it does not appear possible to display previously input indicator criteria. Indicator information is not displayed in the SS#/DISPLAY function, nor does existing indicator information appear as default values in the SS# function. Also, when using the NEW function to create a new SS, indicator criteria are not prompted for. It appears that the only way to define indicator criteria is to first create a SS using NEW and then to edit it using SS#. More work needs to be done to make this function clearer and more accessible.

4.7.2.1.2 ST-#-Name

NAME is a 80 character or less descriptive name associated with a SS. ILS displays:

NAME: 'present name'/ User enters <Return> to retain 'present name' or enters 'new name'.

The user may also delete the entire SS at this point if desired.

After ILS has displayed 'present name', user enters '*DEL'. ILS then deletes the SS and informs the user of that fact.

4.7.2.1.3 ST-#-Status codes

The record status code is a one-character alphabetic code defined in a fixed field of an OCLC or MARC record. Its possible values are:

a -	previously partial record	(bibliographic records only)
n -	new record	(bib and authority records)
c -	corrected or revised record	(bib and authority records)
d -	deleted record	(bib and authority records)
p -	previously CIP record	(bibliographic records only)

ILS displays:

STATUS CODE: 'present status code(s)'/ User enters <Return> to retain 'present status code(s)' or enters a new string of status codes. Codes are enters as an uninterrupted string without punctuation, e.g., ancp. If records with any of the possible status codes are to be included, the user can enter 'ALL'.

4.7.2.1.4 ST-#-Types

The record type code is a one-character alphabetic code defined in a fixed field of an OCLC or MARC record. Its possible values are:

a -	language materials, printed	(bib records only)
b -	language materials, manuscript	(bib records only)
c -	music scores, printed	(bib records only)
d -	music, manuscript	(bib records only)
e -	maps and atlases, printed	(bib records only)
f -	maps, manuscript	(bib records only)
g -	motion pictures and film	(bib records only)
h -	microform publications	(bib records only)
i -	sound recordings, langugae or spoken	(bib records only)
j -	sound recordings, music	(bib records only)
k -	pictures, designs, etc.	(bib records only)
l -	computer media	(bib records only)
n -	special instructional materials	(bib records only)
o -	kits	(bib records only)
z -	authority data	(authority records only)

ILS displays:

TYPE OF RECORD CODES: 'present string of codes'/ User enters <Return> to retain 'present string of codes' or enters 'new string of codes'. New codes are entered as an uninterrupted string with no punctuation, e.g.,

abcdefgnijklno. If the user wants to include records with any of the allowable codes, s/he can enter 'ALL'.

4.7.2.1.5 ST-#-Bib level

The bibliographic level code is a one-character alphabetic code defined in a fixed field of an OCLC or MARC record. Its possible values are:

a - analytic	(bib records only)
c - collections	(bib records only)
m - monographs (single monographs)	(bib records only)
s - serials	(bib records only)
t - authority name/title heading	(authority records only)
u - authority uniform title	(authority records only)
x - authority name heading	(authority records only)
y - authority subject heading	(authority records only)

ILS displays:

BIBLIOGRAPHIC LEVEL CODES: 'present string of codes'/ User enters <Return> to retain 'present string of codes' or enter 'new string of codes'. Codes are entered in a continuous string without punctuation, e.g., acms. If records with any allowable bibliographic level are to be selected, the user can enter 'ALL'.

4.7.2.1.6 ST-#-Rec completeness

The record completeness code is a one-character alphabetic or numeric code (including the 'blank') defined in an OCLC bibliographic record. It is applicable ONLY to bibliographic records; it is not applicable to authority records. Its possible values are:

- full level: derived from physical inspection, all appl. codes input
1 - full level: derived from LC cataloging record, all possible codes input
5 - partial level: full descriptive cat. by LC, no subject cat. or class.
8 - CIP: record created from cataloging publication data
E - OCLC identified an error in MARC record
I - OCLC participant input: all applicable codes should have been supplied
J - MARC deleted record. OCLC retains it (probable error in LC card #)
K - OCLC participant input sublevel: not all applic. codes have been supplied
L - non-MARC: derived from non-OCLC, non-LC source
O - order: record created from order information by OCLC participant
W - OCLC system indentified a possible error in MARC record

ILS displays:

RECORD COMPLETENESS CODES: 'present string of codes'/ User enters <Return> to retain 'present string of codes' or enters a 'new string of codes'. New codes are entered in a continuous string of characters without punctuation, e.g., ' 1'. If records with any allowable value for record completeness are to be included in the selection process, user may enter 'ALL'.

4.7.2.1.7 ST-#-Desc cat

The descriptive cataloging code is a one-character alphabetic code (including a blank) defined in a fixed field of an OCLC or MARC record. Its possible values are:

-	record is in non-ISBD form	(bib and authority records)
i	record is in full ISBD form	(bib and authority records)
p	record is in partial ISBD form	(bib and authority records)
r	record is in provisional ISBD form	(bib and authority records)

ILS displays:

DESCRIPTIVE CATALOGING CODES: 'present string of codes'/ User enters <Return> to retain 'present string of codes' or enters a 'new string of codes'. New codes are entered as a continuous string of characters without punctuation, e.g., ' ipr'. If records with any allowable descriptive cataloging code are to be included, user can enter 'ALL'.

4.7.2.1.8 ST-#-Tag selection

Now that the bibliographic attributes for selection have been edited, ILS permits the user to edit the Tag Selection definitions.

Unfortunately, this function does not appear to operate properly. The presently defined tags cannot be displayed and edited. Rather, the user is prompted as if entering new tag definitions. 3/87

4.7.2.2 ST - #/DISPLAY

Upon entering '#/DISPLAY', ILS displays the detailed contents of the specified Selection Strategy. The number and name of the SS are first displayed; then the bibliographic attributes of selected records are listed; lastly, for each type of material (e.g., serials, monographs, A/V) included in the SS, each defined tag is listed, including its name, the number of repeats allowed, and the subfield codes selected.

ILS displays:

SELECTION STRATEGY # 'number' 'name'

```
        STATUS CODES: 'string of status codes'
        TYPES: 'string of record type codes'
        BIBLIOGRAPHIC LEVELS: 'string of level codes'
        COMPLETENESS CODES: 'string of completeness codes'  (for bib records)
        DESCRIPTIVE CATEGORIES: 'string of category codes'


        TAG SELECTION FOR 'type name1':
            'tag code1'    'tag name1'
                           # REPEATS: 'number of repeats'
                           SUBFIELD CODES: 'string of subfield codes'
            'tag code2'    'tag name2'
                           # REPEATS: 'number of repeats'
                           SUBFIELD CODES: 'string of subfield codes'
            ETC. for rest of tags defined for 'type name1'
        TAG SELECTION FOR 'type name2'
            'tag code1'    'tag name1'
                           # REPEATS: 'number of repeats'
                           SUBFIELD CODES: 'string of subfield codes'
            'tag code2'    'tag name2'
                           # REPEATS: 'number of repeats'
                           SUBFIELD CODES: 'string of subfield codes'
            ETC. for rest of tags defined for 'type name2'
        ETC. for rest of 'types'.
```

Tags are listed in tag code order, all numeric codes first in increasing numeric order, followed by all alpha codes in increasing alpha order. 'type name1' and 'type name2' refer to TYPE. For bibliographic records TYPE can assume the following values: (1)SER (2)BKS (3)A/V (4)MAP (5)MUS (6)MAN. For authority records TYPE can assume the following values: (7)authority name/title heading (8) authority uniform title heading (9)authority name heading (10)authority subject heading.

4.7.2.3 ST - LIST

Upon entering 'LIST', ILS displays a condensed list of all existing Selection Strategies (either bibliographic or authority, as specified previously). The display includes the number and name of each SS and its bibliographic attributes for record selection; it does not include information about specific tags or material types.

For bibliographic records SSs, ILS displays:

```
1) 'name1'
   STATUS: 'codes'   TYPES: 'codes'   BIB LEV: 'codes'   COMPL: 'codes'
   DESC CAT: 'codes'
2) 'name2'
   STATUS: 'codes'   TYPES: 'codes'   BIB LEV: 'codes'   COMPL: 'codes'
   DESC CAT: 'codes '
ETC  for rest of SSs.
```

The display for authority record SSs is identical to that for bibliographic records, except for the absence of the COMPL codes which are not applicable to authority records.

4.7.2.4 ST - NEW

Upon entering 'NEW', ILS establishes a new Selection Strategy, assigns it the appropriate sequential number, and prompts the user for its defining information. ILS displays:

SELECTION STRATEGY: 'assigned number'
COPY EXISTING SS#: If the user enters <Return> for NO, ILS proceeds to prompt for information. If the user enters the number of an existing SS, ILS provides the information from the existing SS as a default for each prompt. The user then enters <Return> to retain that value or enters a new value.
NAME: User enters a name for the SS (maximum of 80 characters).

The user is then prompted for bibliographic attributes of records to be selected. These include:

1. Status codes
2. Type of record codes
3. Bibliographic level codes
4. Record completeness codes
5. Descriptive cataloging codes

After defining the bibliographic attributes for selection, the user is prompted for which types of material records are to be selected and which tags and subfields are to be included.

6. Type and tag selection

For more detailed HELP, select the number of the desired option.

4.7.2.4.1 ST-NEW-Status codes

The record status code is a one-character alphabetic code defined in a fixed field of an OCLC or MARC record. Its possible values are:

a -	previously partial record	(bibliographic records only)
n -	new record	(bib and authority records)
c -	corrected or revised record	(bib and authority records)
d -	deleted record	(bib and authority records)
p -	previously CIP record	(bibliographic records only)

ILS displays:

STATUS CODE: User enters codes of records to be selected. Codes are entered as an uninterrupted string without punctuation.

e.g., abcr. If records with any of the possible status codes are to be included, the user can enter 'ALL'.

4.7.2.4.2 ST-NEW-Type

The record type code is a one-character alphabetic code defined in a fixed field of an OCLC or MARC record. Its possible values are:

a - language materials, printed	(bib records only)
b - language materials, manuscript	(bib records only)
c - music scores, printed	(bib records only)
d - music, manuscript	(bib records only)
e - maps and atlases, printed	(bib records only)
f - maps, manuscript	(bib records only)
g - motion pictures and film	(bib records only)
h - microform publications	(bib records only)
i - sound recordings, langugae or spoken	(bib records only)
j - sound recordings, music	(bib records only)
k - pictures, designs, etc.	(bib records only)
l - computer media	(bib records only)
n - special instructional materials	(bib records only)
o - kits	(bib records only)
z - authority data	(authority records only)

ILS displays:

TYPE OF RECORD CODES: User enters codes to be included in record selection. New codes are entered as an uninterrupted string with no punctuation, e.g., abcdefghijklno. If the user wants to include records with any of the allowable codes, s/he can enter 'ALL'.

4.7.2.4.3 ST-NEW-Bib level

The bibliographic level code is a one-character alphabetic code defined in a fixed field of an OCLC or MARC record. Its possible values are:

a - analytic	(bib records only)
c - collections	(bib records only)
m - monographs (single monographs)	(bib records only)
s - serials	(bib records only)
t - authority name/title heading	(authority records only)
u - authority uniform title	(authority records only)
x - authority name heading	(authority records only)
y - authority subject heading	(authority records only)

ILS displays

BIBLIOGRAPHIC LEVEL CODES: User enters codes of records to be included. Codes are entered in a continuous string without punctuation, e.g., acms. If records with any allowable bibliographic level are to be selected, the user can enter 'ALL'.

4.7.2.4.4 ST-NEW-Rec Completeness

The record completeness code is a one-character alphabetic or numeric code defined in an OCLC bibliographic record. It is applicable ONLY to bibliographic records; it is not applicable to authority records. Its possible values are:

- full level: derived from physical inspection, all appl. codes input
1 - full level: derived from LC cataloging record, all possible codes input
3 - partial level: full descriptive cat. by LC, no subject cat. or class.
8 - CIP: record created from cataloging publication data
E - OCLC identified an error in MARC record
I - OCLC participant input: all applicable codes should have been supplied
J - MARC deleted record, OCLC retains it (probable error in LC card #)
K - OCLC participant input sublevel: not all applic. codes have been supplied
L - non-MARC: derived from non-OCLC, non-LC source
O - order: record created from order information by OCLC participant
W - OCLC system indentified a possible error in MARC record

ILS displays:

RECORD COMPLETENESS CODES: User enters codes of records to be selected. New codes are entered in in a continuous string of characters without punctuation, e.g., ' 13'. If records with any allowable value for record completeness are to be included, user may enter 'ALL'.

4.7.2.4.5 ST-NEW-Desc cat

The descriptive cataloging code is a one-character alphabetic code (including a blank) defined in a fixed field of an OCLC or MARC record. Its possible values are:

- record is in non-ISBD form (bib and authority records)
i - record is in full ISBD form (bib and authority records)
p - record is in partial ISBD form (bib and authority records)
r - record is in provisional ISBD form (bib and authority records)

ILS displays:
DESCRIPTIVE CATALOGING CODES: User enters codes for records to be selected. New codes are entered as a continuous string of characters without punctuation, e.g., ' ipr'. If records with any allowable descrip-

tive cataloging code are to be included, user may enter 'ALL'.

4.7.2.4.6 ST-NEW-Tag selection

Now that the bibliographic attributes for selection have been entered, ILS permits the user to enter the Tag Selection definitions, including the type(s) of materials to be selected, the specific fields and subfields to be included, and the priority groups, if any, to be used. The tag definitions, together with the bibliographic attributes, constitute the newly defined Search Strategy.

ILS displays:

TAG SELECTION:

FOR TYPE: User enters code for appropriate type. (1)SER (2)BKS (3)A/V (4)MAP (5)MUS (6)MAN (7)AUTHORITY NAME/TITLE HEADING (8)AUTHORITY UNIFORM TITLE HEADING (9)AUTHORITY NAME HEADING (10)AUTHORITY SUBJECT HEADING

PRIORITY GROUPS FOR THIS TYPE: User enters <Return> for NONE or the appropriate Priority Group Number(s).

TAG: User enters a valid 3-character tag code. If the user wishes to include tags as defined in the Item Tag or Authority Tag Dictionary, s/he enters 'ALL'. ILS copies the tags, # repeats, and subfield codes from the appropriate Dictionary into the SS.

REPEATS: User enters the maximal number of repeats of this tag to be transferred from the tape into the workspace.

SUBFIELD CODE(S): User enters codes of subfields to be selected, entered in a continuous string of characters without punctuation.

TAG: User enters code of next tag.

REPEATS:

SUBFIELD CODE(S):

ETC. for rest of tags selected for this type.

FOR TYPE: User enters code for next type of material.

PRIORITY GROUPS FOR THIS TYPE:

TAG:

REPEATS:

SUBFIELD CODE(S):

ETC. for rest of tags selected for this type.

ETC. for rest of types selected.

4.7.3 ST Special Features

Users must be careful to distinguish between 'TYPE OF RECORD CODE' and 'TYPE OF MATERIAL CODE'. Both are referred to as 'TYPE' in SS display and creation. 'TYPE OF RECORD CODE' is one of the bibliographic attributes in a SS and is a one-letter alphabetic code from the fixed fields of a MARC record. 'TYPE OF RECORD CODE' may have values of 'a' through 'o' for bibliographic records and a value of 'z' for authority records. 'TYPE OF MATERIAL CODE' assumes the values of '1' through '6' for bibliographic records and '7' through '10' for authority records. Users must define the 'TYPE OF MATERIAL CODE' before specifying which tags are to be included in the SS for materials of that type.

4.8 INDICATORS ADD/EDIT

The INDICATOR ADD/EDIT (IA) function allows authorized users to add new indicators to and edit existing indicators of bibliographic tags in the Item Tag Dictionary.

AVAILABLE INFORMATION

1. IA - Overview
2. IA - Step by Step
3. IA - Special Features

For more detailed HELP, press the number of the appropriate option.

4.8.1 IA Overview

Indicator information is carried in the Item Tag Dictionary along with its appropriate bibliographic tag. A bibliographic tag may have a minimum of none and a maximum of 2 defined indicators; each existing indicator may assume a value of 0-9 or may be blank. The INDICATOR ADD/EDIT (and LIST INDICATORS) function allows access to the indicator data in the Item Tag Dictionary. This data defines each indicator, its position and possible values, the types of materials for which it is applicable, and its meaning. Indicator information may be viewed via the LIST INDICATORS (LI) function. The IA function allows authorized users to add new indicators to and edit existing indicators of bibliographic tags in the Item Tag Dictionary.

4.8.2 IA Step by Step

Upon entering IA, ILS displays:

ENTER TAG: User must enter a valid 3-character tag code. ILS then locates that tag in the Item Tag Dictionary and displays information about the first value of the first indicator for that tag, e.g., for OCLC tag 100:

```
TAG: 100
INDICATOR POSITION: 1ST
INDICATOR VALUE: 0
TYPES: 123456
INDICATOR MEANING: FORENAME

ENTER EDIT OPTION OR CARRIAGE RETURN IF DATA IS OK>
```

If the user enters <Return>, a similar display of information about the next defined value of the indicator is shown. To edit any of the above information about the indicator, one of the following editing commands is entered.

The options for editing indicators are:

1. Edit indicator position. (User enters 'P')
2. Edit indicator value. (User enters 'V')
3. Edit the types. (User enters 'T')
4. Edit the indicator's meaning. (User enters 'M')

5. Edit indicators for a different tag. (User enters '-')
6. Delete indicator. (User enters 'D')
7. Create a new indicator entry for this tag. (User enters 'N')
8. Edit another indicator for this tag. (User enters 'A')

For more detailed HELP on these options, press the number of the desired option.

4.8.2.1 IA - Edit position

Upon entering 'P', ILS changes the current indicator position to the other possible value, i.e., if it were 1, it is changed to 2, and vice versa. If there already exists an indicator with the same value and types specification as that which would result from the position change, ILS informs the user of that fact, displays the complete information for that existing indicator and asks the user if s/he wishes to proceed, e.g.,

2ND INDICATOR WITH A VALUE OF '3' FOR TAG abc EXISTS ALREADY.

DISPLAY OF 2ND INDICATOR INFORMATION FOR TAG abc
WITH AN INDICATOR VALUE OF 3

ILS displays:

ARE YOU SURE THAT YOU WANT TO REPLACE:
'meaning of indicator2'

*****WITH*****

'meaning of indicator1'
ENTER Y OR N

(Since the value and types associated with indicator1 are the same as those associated with indicator2 in this case, changing the position information really results in changing only the meaning associated with indicator2.)

User enters 'Y' for YES to execute the change or 'N' for NO to delete the present transaction.

4.8.2.2 IA - Edit value

Upon entering 'V', ILS displays:

INDICATOR VALUE 'current value'/ User enters <Return> to retain 'current value' or enters a 'new value'.

ILS changes the value of the indicator to 'new value' and then displays the updated chart of information about the indicator. If 'new value' already exists as a valid indicator value, ILS informs the user of that fact, displays the complete information for that existing indicator value, and

asks the user if s/he wishes to proceed, e.g.,

2ND INDICATOR WITH A VALUE OF '3' FOR TAG abc EXISTS ALREADY.

DISPLAY OF 2ND INDICATOR INFORMATION FOR TAG abc
WITH INDICATOR VALUE OF '3'.

ILS displays:

ARE YOU SURE THAT YOU WANT TO REPLACE: 'meaning of current value' *****WITH***** 'meaning of new value' ENTER Y OR N	(Since the position and types associated with 'current value' are the same as for 'new value', changing the value really results in changing only the meaning associated with 'current value'.)

User enters 'Y' for YES to execute the change or 'N' for NO to delete the present transaction.

4.8.2.3 IA - Edit types

Upon entering 'T', ILS displays:

TYPE: 'current type'/	User enters <Return> to retain 'current type' or enters a 'new type' by entering a string of digits, e.t., '2345'.

ILS changes the value of type to 'new type' and then displays the updated chart of information about the indicator. If 'new type' already exists as a valid indicator type, ILS informs the user of that fact, displays the complete information for that existing indicator type, and asks the user if s/he wishes to proceed, e.g.,

2ND INDICATOR WITH A VALUE OF '3' FOR TAG abc EXISTS ALREADY.

DISPLAY OF 2ND INDICATOR INFORMATION FOR TAG abc
WITH INDICATOR VALUE OF '3'.

ILS displays:

ARE YOU SURE THAT YOU WANT TO REPLACE: 'meaning of current type' *****WITH***** 'meaning of new type' ENTER Y OR N	(Since the position and value associated with 'current type' are the same as for 'new type', changing the type really results in changing only the meaning associated with 'current type'.)

User enters 'Y' for YES to execute the change or 'N' for NO to delete the present transaction.

4.8.2.4 IA - Edit meaning

Upon entering 'M', ILS displays, e.g.:

ENTER THE MEANING OF 2ND INDICATOR WITH A VALUE OF '3' FOR TAG '00:

User enters a free-text description of the meaning of that indicator value in 200 characters or less.

4.3.2.5 IA - Edit another tag

Upon entering '-', ILS displays:

ENTER TAG: User enters another 3-character tag code. ILS displays indicator information about that tag and allows the user to edit or delete indicator information for that tag.

4.8.2.6 IA - Delete

Upon entering 'D', ILS deletes the specified indicator information from the Item Tag Dictionary and displays a message, e.g.:

INDICATOR VALUE OF '3' IN THE 2ND POSITION FOR TYPE 2345 WAS JUST DELETED!!

4.3.2.7 IA - Add indicator

Upon entering 'N', ILS prompts the user for the new indicator information.

INDICATOR POSITION: User enters a 'position' (1 or 2).
INDICATOR VALUE: User enters a 'value' (1 through 9).
TYPES: 123456/ User enters <Return> if this indicator value is applicable to all types of material; if it is not, user enters a string of digits to indicate for which types of materials it is applicable. (1) SER (2) BKS (3) A/V (4) MAP (5) MUS (6) MAN

ILS now prompts for the meaning of the above defined indicator, e.g.,

ENTER THE MEANING OF 2ND INDICATOR WITH A VALUE OF '1' FOR TAG 245

User enters a free-text description (maximum of 200 characters) of the meaning ascribed to this indicator value for this tag. ILS then adds the new indicator information to the Item Tag Dictionary and allows the user to add another new indicator for the specified tag.

If the user enters a position, value and type specification which already matches an existing indicator for the specified tag, ILS informs the user of that fact and displays the indicator information for that existing indicator.

4.8.2.8 IA - Edit another indicator

Upon entering 'A', ILS displays:

INDICATOR POSITION: 'current position'/	User enters <Return> to edit the indicator in 'current position' or enters position of desired indicator.
ENTER INDICATOR VALUE:	User enters the value of of the desired indicator.

ILS then displays indicator information for the specified position and value. The user can then proceed to edit that indicator if desired.

4.8.3 IA Special Features

In INDICATOR ADD/EDIT, the '~' is used as a command to allow the user to begin editing indicators for another tag. Upon entering a '~', ILS displays the prompt:

ENTER TAG NUMBER:

If the user enters a <Return> in response to this tag prompt, control is shifted out of IA and back to whatever function the user was previously using.

4.9 LIST INDICATORS

The LIST INDICATORS (LI) function allows authorized users to display or print out information about indicators associated with bibliographic tags in the Item Tag Dictionary.

AVAILABLE INFORMATION
1. LI - Overview
2. LI - Step by Step
3. LI - Special Features

For more detailed HELP, press the number of the appropriate option.

4.9.1 LI Overview

Indicator information is carried in the Item Tag Dictionary along with its appropriate bibliographic tag. A bibliographic tag may have a minimum of none and a maximum of 2 indicators; each existing indicator may assume a value of 0-9 or may be blank. The LIST INDICATOR (and INDICATOR ADD/EDIT) function allows access to the indicator data in the Item Tag Dictionary. This data defines each indicator, its position and possible values, the types of materials for which it is applicable, and its meaning. The LIST INDICATORS (LI) function allows authorized users to display or print out information from indicators associated with bibliographic tags in the Item Tag Dictionary. All existing indicators or indicators associated with a specific subset of bibliographic tags may be displayed.

4.9.2 LI Step by Step

Upon entering LI, ILS displays:

PRINT TO DEVICE: 0/ User enters <Return> for 0, indicating that output will be listed at the terminal which the user is presently using. Any other output device may be indicated by entering its device number.

In the Item Tag Dictionary, tags are arranged as follows: numeric tags in increasing numeric order, followed by alpha tags in increasing alpha order. ILS now prompts the user to specify tags for which indicators will be listed.

LIST FROM TAG: 000/ User enters <Return> to begin listing tags starting with tag 000 (i.e, the first tag). To begin listing with some other tag, user enters the three character tag code.

LIST THRU TAG: ZZZ/ User enters <Return> to indicate that tags should be listed through tag ZZZ (ie., the last tag). To indicate that listing should stop at a specified tag, user enters the three character code of the tag at which listing should stop.

ALL TAGS OR LOCAL TAGS ONLY: A/ User enters <Return> to list all tags or 'L' to list only local tags

ILS then displays information about the indicators associated with each tag specified, e.g.,

OCLC TAG: 100 NAME: ESTABLISHED HEADING - PERSONAL NAME

IND POS	INDICATOR	MATERIAL TYPE SER	BKS	A/V	MAP	MUS	MAN	PURPOSE OR MEANING OF INDICATOR
1	0	Y	Y	Y	Y	Y	Y	FORENAME
1	1	Y	Y	Y	Y	Y	Y	SINGLE SURNAME
1	2	Y	Y	Y	Y	Y	Y	MULTIPLE SURNAME
1	3	Y	Y	Y	Y	Y	Y	NAME OF FAMILY
2	'BLANK'			Y	Y		Y	INDICATOR IS BLANK
2	0	Y	Y			Y		MAIN ENTRY IS NOT SUBJECT
2	1	Y	Y			Y		MAIN ENTRY IS SUBJECT

4.10 PROCESS OCLC TAPE

The PROCESS OCLC TAPE function (PO) allows authorized users to initiate reading of data from an MARC bibliographic tape into the Master Bibliographic File (MBF) or into a temporary workspace.

AVAILABLE INFORMATION

1. PO Overview
2. PO Step by Step
3. PO Special Features

For more detailed HELP, press the number of the desired option.

4.10.1 PO Overview

The PO function controls the reading of data from a MARC bibliographic or authority tape (*) into an ILS workspace. Users must specify to the PO function whether the tape contains bibliographic or authority data, whether the records are to be loaded directly to the MBF or into a workspace, and which Selection Strategy is to be used.

ILS first must clear certain working areas on the disk in preparation for reading new records, then reads the records into the MBF or into the specified workspace, and finally indexes the records so that they can be accessed through the online catalog (if loaded to the MBF) or through the NEWLY CATALOGED ITEM function (if loaded to a workspace).

(*) The authority file load is not complete as of July 1981.

4.10.2 PO Step by Step

The user must first mount the tape onto the tape drive. Upon entering PO, ILS displays:

BIBLIOGRAPHIC TAPE? YES/ User enters <Return> if the tape contains bibliographic records or 'N' for NO if it contains authority records. ILS then displays:

LOAD DIRECT TO MBF? YES/ User enters <Return> to load the records to the MBF or 'N' for NO to load them to a workspace.

TAPE# 'number' DATE: 'date on tape'

OK? YES/ User enters <Return> to verify the TAPE# and DATE displayed.

NUMBER OF RECORDS ON TAPE: User enters the number of records to be read from the tape (1-9999).

WORKSPACE#: User enters the WS# of the WS into which the records will be re The workspace must have been previously created.

(Only asked for workspace load) If there are presently records in that specified workspace, ILS informs the user of that fact by displaying:

WORKSPACE 'WS#' WAS USED ON 'date last used'. GO AHEAD ANYWAY? NO/

User enters <Return> to retract her/his request for that particular workspace. If the user enters 'Y' for YES, records in the workspace will be overwritten. Thus, extreme caution should be used when re-using workspaces.

SELECTION STRATEGY#: User enters the number of the SS to be applied to the records as they are read off the tape.

EVERYTHING O.K.? YES/ User enters <Return> to indicate that all of the above information is correct. User enters 'N' for NO to erase the entire present transaction.

ILS then prepares to process the tape. Initially, working areas on the disk are cleared of old data. While this is proceeding, ILS displays:

(CLEANING OUT FILES...)

After working files are cleaned out, ILS begins to read each record off the tape and apply the selection strategy. As each record is read, a sequential number is displayed at the terminal indicating that that record has indeed been read in or rejected because it didn't meet the selection criteria. ILS displays, for example:

1, 2, 3, 4, 5, 6, 7, 8 IS A REJECT, 9, 10 IS A REJECT

After the specified number of records have been read from the tape, ILS displays:

PHEW! FINISHED...

ILS then proceeds to index those records read in from the tape. This is the most time-consuming part of the process and, while it is happening, the user should NOT attempt to process another tape. Processing another tape before the completion of indexing of the previous tape will destroy data read from the previous tape (remember the 'CLEANING OUT FILES...' at the beginning of PO?).

4.10.3 PO Special Features

While specifying initial information for the PO process, the user identifies the number of records to be read from the input tape. If any of these records are duplicates with the same OCLC number, ILS accepts only the most recent record to be transferred into the workspace. Thus, the total number of records actually transferred to the workspace may be somewhat less than the number of records actually read from the tape.

The reading of records from the tape may occassionally be stopped before completion for some external reason, e.g., a system failure. If the same tape is then remounted, ILS will display

THIS TAPE PARTIALLY PROCESSED. I'VE EXTRACTED 'n' RECORDS.

The user may then proceed to re-initiate processing of the tape. Records are re-read from the beginning of the tape

4.11 DISPLAY TAPE OUTPUT

The DISPLAY TAPE OUTPUT function (DT) allows authorized users to display records which have been copied from an input MARC tape into a workspace according to a specified Selection Strategy. The Selection Strategy used and various other information concerning the transfer of records into the workspace may also be viewed.

AVAILABLE INFORMATION

1. DT - Overview
2. DT - Step by Step
3. DT - Special Features

For more detailed HELP, press the number of the desired option.

4.11.1 DT Overview

The DISPLAY TAPE OUTPUT function (DT) allows authorized users to display records which have been copied from an input MARC tape into a workspace according to a specified Selection Strategy. The Selection Strategy used and various other information concerning the transfer of records into the workspace may also be viewed. The display can be viewed at the terminal or may be printed out.

4.11.2 DT Step by Step

Upon entering DT, ILS displays:

WORKSPACE NUMBER: User enters the number of an existing workspace. Entering a '?' allows the user to list the existing workspaces.

LIST FROM: BEGINNING/ User enters <Return> to begin listing workspace records with the first record. To begin with a specific record, user enters the OCLC number of the beginning record.

LIST THRU: THE END/ User enters <Return> to list records through the last record in the workspace. To end with a specific record, user enters the OCLC number of the last record to be listed.

Records in the workspace are in OCLC number order. Thus, LIST FROM and LIST THRU define the range of OCLC numbers whose records will be listed.

SKIP SELECTION CRITERIA? YES/ User enters <Return> for YES if s/he wants to suppress printing of the Selection Strategy used to load records into this workspace. To see this, enters 'NO'. ILS displays the following information:

VOL SERIAL #: (#)
DATE: (date)
DATA SET SERIAL #: (#)
VOL SEQ #: (#)
PROCESSED ON (date of processing)
NUMBER OF RECORDS SCANNED: (number)
NUMBER OF RECORDS SELECTED: (number)
APPLYING
SELECTION STRATEGY # (SS # and name)

Detailed Selection Strategy displayed.

PRINT TO DEVICE: 0/ User enters <Return> to display records at the terminal or s/he enters a device number at which output should be displayed.

ILS then displays the specified records in OCLC number order, one at a time, in an OCLC-like format. User enters <Return> to initiate display of the next record. After the last specified record has been displayed, ILS displays:

(END)

4.11.3 DT Special Features

As of 3/81, there are no Known Special Features of DT.

4.12 WORKSPACE ADD/DELETE

The WORKSPACE ADD/DELETE (WA) function allows authorized users to create, delete, or list workspaces.

AVAILABLE INFORMATION

1. WA - Overview
2. WA - Step by Step
3. WA - Special Features

For more detailed HELP, press the number of the desired option.

4.12.1 WA Overview

The WORKSPACE ADD/DELETE (WA) function is used in defining new workspaces and in eliminating workspaces no longer needed. Records being read from an input MARC tape must be read into a previously created workspace with a defined name and number. The WA function allows authorized users to create, delete, and list workspaces.

4.12.2 WA Step by Step

Upon entering WA, ILS displays:

START DISPLAYING AT WORKSPACE # — User enters <Return> to list all existing workspace #'s and names or enters a specific # at which to start listing workspace #'s and names. If the user wishes to bypass listing of existing workspaces, s/he may enter '-'.

After workspaces have been listed, the user may choose to

1) add a new workspace
2) delete an existing workspace

For more detailed HELP, enter the number of the desired option.

4.12.2.1 WA - Add

ILS displays:

ADD OR DELETE — User enters 'A' to add a new workspace.

WORKSPACE # — User enters an identifying number for the new workspace (maximum of 5 digits). If the number already exists as a workspace number, ILS displays:

THIS IS DEFINED. CHANGE NAME? NO/ — If the user enters <Return> for NO,

ILS allows the user to enter another number. If the user enters 'Y' for YES, ILS allows the user to change the name of the existing workspace.

NAME: User enters a name for the workspace (maximum of 50 characters).

ILS creates the new workspace with the specified number and name and displays:
WS #'number' WAS ADDED

4.12.2.2 WA - Delete

ILS displays:
ADD OR DELETE User enters 'D' to delete an existing workspace.

WORKSPACE # User enters the number of the workspace to be deleted. If the user enters a number for which no workspace exists, ILS informs the user of that fact and allows the user to enter another number. ILS then displays:

WORKSPACE 'number' DELETION REQUESTED
ARE YOU SURE? NO/ If the user enters <Return> for NO, ILS deletes the present transaction and allows the user to enter another number if desired. If the user enters 'Y' for YES, ILS deletes the specified workspace (and any records contained within it) and displays:
DELETING!!

4.12.3 WA Special Features

In response to the ILS prompt 'START DISPLAYING AT WORKSPACE#', the user may enter '-' in order to bypass that listing.

4.13 EDIT WORKSPACE RECORDS

The EDIT WS RECORDS function (EW) allows authorized users to edit records which have been read into a workspace. An edited record may then be filed back into the workspace, may be moved into the Master Bibliographic File (MBF), may be restored to its original state before editing, or may be deleted from the workspace.

AVAILABLE INFORMATION

1. EW Overview
2. EW Step by Step
3. EW Special Features

For more detailed HELP, press the number of the desired option.

4.13.1 EW Overview

The EDIT WS RECORDS function (EW) allows authorized users to edit records which have been read into a workspace. Data in existing fields may be changed or deleted; new fields my be added; the entire record may be displayed. The edited record may then be filed back into the workspace, moved into the Master Bibliographic File (MBF), restored to its original state before editing, or deleted from the workspace. Thus, the EW function allows a library to make changes to individual records in the workspace before further processing or to delete records from the workspace.

4.13.2 EW Step by Step

Upon entering EW, ILS displays:

WORKSPACE NUMBER: User enters the number of the workspace containing the records to be edited. Entering a '?' allows the user to view a list of all workspace names and numbers.

ID: The user identifies which record is to be edited by entering the OCLC number of the record of interest. Alternatively, the user may enter 'N' for NEXT in order to edit the next record, regardless of particular OCLC number. Entering 'N' to the first prompt for ID pulls up the first record in the workspace.

ILS then displays the specified record in an OCLC format, listing all numberic fields in increasing order, followed by all alpha fields in increasing order. Both indicator values and subfield codes and data are displayed. The user may choose to

1. Edit a field. User enters the 3-character tag code of a defined tag.

If the field is a multiply-occurring one, user may also specify an occurrence number by a period followed by the desired site number, e.g., '650.2'. Both indicator values and subfield data may be edited.

2. Delete a field. User enters 'tag code/DEL' or 'tag code.site number/DEL' to indicate which field is to be deleted.
3. Add a field. User enters the 3-character tag code of the new field.
4. Display the record. User enters 'D' for DISPLAY.

For more detailed HELP, press the number of the desired option.

4.13.2.1 EW - Edit

Upon entering the name of a defined tag, ILS displays:

SUBFIELD:

By entering the appropriate response, the user may choose to

1. Edit the indicator values for this tag. (User enters 'IN')

2. Edit a subfield of this tag. (User enters 'subfield code' or 'subfield code.site number')

For more detailed HELP, press the number of the desired option. To see HELP on specifying the disposition of an edited record, press 'D'.

4.13.2.1.1 EW - Edit indicators

Upon entering 'IN' in response to the subfield prompt, ILS displays:

OLD IN.: 'values of present indicators'
NEW IN.: User enters two digits representing the new values of the two indicators, respectively. Digits are entered without punctuation, e.g., '12'.

The user may then proceed to edit a subfield if desired.

To see HELP on specifying the disposition of an edited record, press 'D'.

4.13.2.1.2 EW - Edit subfield data

Upon entering the name of a defined tag, ILS displays:

SUBFIELD: User enters the lower-case alphabetic code of a valid subfield. ILS displays the name of the subfield for verification and then displays the data from that subfield. ILS then prompts for editing specifications.
REPLACE: User enters the characters to be replaced.
WITH: User enters the new characters to replace the old ones

specified above. ILS then displays the edited subfield for verification.

In response to the prompt 'SUBFIELD:', the user may enter 'subfield code/DEL' to delete that subfield from the record.

The user may then do further editing on the same subfield, edit another subfield of the same tag, or edit another tag of the same record by successively entering <Return> to ILS prompts. To see HELP on the dispositon of an edited record, press 'D'.

4.13.2.2 EW - Delete

After specifying which tag is to be deleted, ILS displays:

DELETING TAG O.K.? YES/ User enters <Return> for YES or 'N' for NO. If the user enters <Return>, ILS deletes this tag from the record and displays:

DELETED

The user may then proceed to edit, delete, or add another tag to this record. To see HELP for specifying the disposition of an edited record, press 'D'.

4.13.2.3 EW - Add

To add a new field to a record, the user enters the 3-character tag code in response to the TAG prompt. The tag entered must be defined in the Item Tag Dictionary. After entering the tag code, ILS displays the name of the tag for verification and then displays:

IN.: ' '/ ILS displays indicator information (blank for a new tag). User enters <Return> to retain the blank values for the indicators or enters a two-digit number to set the values of the first and second indicators respectively.

SUBFIELD: User enters the code for a defined subfield. If the subfield is a repeatable one, user enters 'subfield code.site number' to indicate the desired occurrence of the subfield. ILS displays the name of the subfield for verification and then allows the user to enter the subfield data. The user can then add another subfield if desired.

To see HELP on specifying the disposition of an edited record, press 'D'.

4.13.2.4 EW - Disposition

After the user has completely finished editing a record, ILS prompts the user for the desired disposition of the edited record. ILS displays:

(F)ILE IN WS#'present WS#', (M)OVE TO MBF, (N)O CHANGE, OR (D)ELETE FROM WS#'present WS#':

User indicates the desired disposition by entering the appropriate letter. If the user enters 'M', ILS moves the record into the MBF and simultan-

eously erases it from the WS. If the MBF already contains a record with the same OCLC number, ILS informs the user of that fact and allows the user to replace the MBF record with the WS record, to compare them, or to do nothing further at this point. The user is then given the choice of deleting the duplicate WS record if desired.

After the disposition of the record has been completed, ILS allows the user to specify another record in the workspace to be edited.

4.13.2.5 EW - Display

Upon entering 'D' for DISPLAY in response to a tag prompt, ILS displays the entire record presently being edited in an OCLC format, displaying tags, indicators, subfield codes and data. The DISPLAY function is useful during the editing process to view all the changes made to a record thus far.

4.13.3 EW Special Features

As of 3/81, there are no known Special Features of EW.

4.14 NEWLY CATALOGED ITEM

NEWLY CATALOGED ITEM permits authorized users to enter cataloging data into the Master Bibliographic File (MBF). It enables catalogers to edit and transfer records from an ILS workspace (Tape File) into the MBF, as well as to enter original data directly into the MBF.

AVAILABLE INFORMATION

1. Overview of Newly Cataloged Item
2. Step by Step Procedures for Newly Cataloged Item
3. Special Features for Newly Cataloged Item

Please enter the number of the type of information you desire:

4.14.1 NE Overview

NEWLY CATALOGED ITEM permits authorized users to enter cataloging data into the Master Bibliographic File (MBF). It enables catalogers to edit and transfer records from an ILS workspace (Tape File) into the MBF, as well as to enter original data directly into the MBF.

Utilizing NEWLY CATALOGED ITEM, the user may search both the MBF and ILS workspaces (Tape Files) for a record of an item, either by title or by call number. If a workspace (Tape File) contains a MARC record for the item, the user may edit or add to the record, produce a permanent barcode label, and add the record permanently to the MBF. If the MBF contains a MARC record for the item, the user may enter a Copy 2 (or Copy 3, etc.) and produce a barcode label.

4.14.2 NE Step By Step

When entering a NEWLY CATALOGED ITEM, ILS will ask:

PRINT BARCODE (Y or N): Y/ — If you press the RETURN key the system will produce a barcode label at the conclusion of the transaction. If you type 'N' and then RETURN the system will not produce the label.

ILS will display:

TEMPORARY ITEM ID: — If you have assigned a temporary item ID number, enter it now. When you have entered the full record into the Master Bibliographic File it will be removed from the Temporary File.

NEWLY CATALOGED ITEM should follow this sequence of steps:

1. SEARCH FOR THE ITEM
   Search the Master Bibliographic File (MBF) and the Tape File

2. ITEM FOUND OR NOT
   View any items found in the MBF or Tape File

3. EDIT RECORD
   Add to, change or create a MARC record

4. ENTER BARCODE DATA
   Supply information that will be encoded on the barcode label.

For more HELP enter the number of the desired option or FORWARD to Special Features:

4.14.2.1 Search for Item

ILS will display:	User should:
TITLE:	Enter title from title page. ILS will search the MBF and the Tape File for cataloging data already in the system.
	OR
	Press RETURN and ILS will display:
CALL #:	Enter call number. ILS will search the MBF and the Tape File for cataloging data already in the system.
	OR
	Press RETURN again. You may now create a new cataloging entry in the MBF, in response to the ILS prompt TAG: For more information on this feature press 'F' once and a RETURN twice to view EDIT RECORD.

4.14.2.2 NE Item Found Or Not

In response to a TITLE or CALL # search ILS will display one of four messages.

1. THERE ARE ENTRIES IN BOTH THE MASTER FILE AND THE TAPE FILE WHICH MATCH [your entry]

2. THERE ARE ENTRIES ONLY IN THE TAPE FILE WHICH MATCH [your entry]

3. THERE ARE ENTRIES ONLY IN THE MASTER FILE WHICH MATCH [your entry]

4. NO ENTRIES IN EITHER MASTER FILE OR TAPES MATCH [your entry]

For HELP with any of these, enter the number of the step and press RETURN.

For information on EDIT RECORD enter 'F'.

4.14.2.2.1 NE Item in MBF and Tape File

If a search in the MBF and Tape File yields hits in both places, ILS will reply:

THERE ARE ENTRIES IN BOTH THE MASTER FILE AND THE TAPE FILE WHICH MATCH [your entry]

MASTER FILE MATCHES

ILS will then display 5 entries at a time.

IF YOU FIND A MATCH IN THE MBF - Enter the index # and ILS will prompt you to ENTER BARCODE DATA.

IF YOU DO NOT FIND A MATCH IN THE MBF - Enter - or '/None'

ILS will display:

TAPE FILE MATCHES

ILS will then display 5 entries at a time.

IF YOU DO NOT FIND A MATCH IN THE TAPE FILE - Enter - or '/None' and ILS will prompt CALL #: and you may search by call number.

IF YOU FIND A MATCH IN THE TAPE FILE - ILS will display the MARC record and prompt TAG: This is the EDIT RECORD step of NEWLY CATALOGED ITEM.

For more information on EDIT RECORD press 'G'.

For more information on ENTER BARCODE DATA press 'G' and RETURN and then press 'F' and RETURN.

4.14.2.2.2 NE Item in Tape File

If a search in the MBF and Tape File yields hits only in the Tape File ILS will reply:

THERE ARE ENTRIES ONLY IN THE TAPE FILE WHICH MATCH [your entry]

TAPE FILE MATCHES

ILS will then display 5 entries at a time.

IF YOU DO NOT FIND A MATCH IN THE TAPE FILE - Enter - or '/None' and ILS will prompt CALL #: and you may search by call number.

IF YOU FIND A MATCH IN THE TAPE FILE - ILS will display the MARC record and prompt TAG: This is the EDIT RECORD step of NEWLY CATALOGED ITEM.

For more information on EDIT RECORD press 'G'.

4.14.2.2.3 NE Item In MBF

If a search in the MBF and Tape File yields hits only in the MBF ILS will reply:

THERE ARE ENTRIES ONLY IN THE MASTER FILE WHICH MATCH [your entry]

MASTER FILE MATCHES

ILS will then display 5 entries at a time.

IF YOU FIND A MATCH IN THE MBF - Enter the index # and ILS will prompt you to ENTER BARCODE DATA.

IF YOU DO NOT FIND A MATCH IN THE MBF - Enter - or '/None' and ILS will prompt CALL #: and you may search by call number.

For more information on ENTER BARCODE DATA press 'G'.

4.14.2.2.4 NE Items In Neither File

ILS will display:

NO ENTRIES IN EITHER THE MASTER FILE OR TAPES MATCH [your entry]

ILS will automatically put you in EDIT RECORD mode allowing you to enter data directly into the MBF.

For more information on the EDIT RECORD step or NEWLY CATALOGED ITEM press the 'G'.

4.14.2.3 NE Edit Record

EDIT RECORD allows the user to enter new data into the MBF or to edit records

already in the MBF or Tape File.

ILS will prompt:	User enters:
TAG:	MARC tag number (e.g., 030, 245) Be sure to include leading zeroes.
IN:	MARC indicator (two characters) If not appropriate for this tag press RETURN
SUBFIELD:	Subfield code (e.g., a, b, z) This entry MUST be in lowercase letters.

ILS will prompt:	User enters:
1>	Information to appear in the subfield.
2>	ILS will prompt for second and third appearances of the subfield until user enters RETURN which will cause TAG: to reappear.

If the user is EDITING data already in the MBF or Tape File, the following sequence may occur.

ILS will prompt:	User should enter:
TAG:	MARC tag number already in the record.
SUBFIELD:	Subfield code already in the record.

ILS will prompt:	User enters:
REPLACE:	Enter the characters which you wish to delete or replace.
WITH:	Enter the corrected data.

NOTE that ILS will replace the first matching character(s). If the subfield contains the text 'Medicined' and the user enters 'd' in response to REPLACE and 'blank' in response to WITH the result would be 'Me icined'. The user should enter 'ned' in response to REPLACE and 'ne' in response to WITH. This will result in 'Medicine'.

The sequences for entering or editing data will repeat until ILS prompts TAG: and the user answers RETURN. Then ILS will move to ENTER BARCODE DATA.

For more information on ENTER BARCODE DATA press 'F'.

4.14.2.4 NE Enter Barcode Data

This final step of NEWLY CATALOGED ITEMS will prompt the user for information to be coded onto the barcode label for the item.

ILS will prompt:	User enters:
LAW OR GENERAL: G/	'L' for Law or press RETURN for General (Other options may appear in this position. Its purpose is to assign items to special collections if desired.)
MONO OR SERIAL: M/	'S' for serials or press RETURN for monographs.
Type:/	Enter a number designated by your library to specify type of material, e.g., fiche, film, or book, or press RETURN to skip this option.
LOAN PERIOD:	Enter a valid loan period for your library 2 weeks, 4 weeks, etc.

ILS will prompt:	User enters:
VIPS? N/	Press RETURN to skip this option. If you enr 'Y' ILS will display:
VOLUME:	Volume number.
ISSUE:	Issuumber.
PART:	Part number.
SUPPLEMENT:	Supplement name or number.
COPY #:	A number MUST be entered here.

Press RETURN and the item will be entered into the Master Bibliographic File. ILS will prompt TITLE: and you will be at step one, SEARCH FOR ITEM.

4.14.3 NE Special Features

A SPECIAL FEATURE of NEWLY CATALOGED ITEM is the use of - or 'up-arrow'.

1. In the SEARCH FOR ITEM step - When ILS prompts CALL #: and the user wants to search by title, pressing the - key will cause ILS to prompt TITLE: The user may then search by title.

AND

If ILS finds matches in the MBF and the Tape File it will display the matches of the MBF first. If the user enters - ILS will display the Tape File matches.

2. In any other step - The - key will take the user back to the previous step. This allows the user to 'start over'

4.15 EDIT ITEM

The EDIT ITEM procedure permits authorized users to edit or add to cataloging data in the Master Bibliographic File (MBF).

AVAILABLE INFORMATION

1. Overview of EDIT ITEM
2. Step by Step Procedures for EDIT ITEM
3. Special Features for EDIT ITEM

Please enter the number of the type of information you desire:

4.15.1 EI Overview

The EDIT ITEM function allows authorized users to edit or add to cataloging data of records in the Master Bibliographic File (MBF). The user first identifies the record to be edited. ILS then allows the user to edit the record by adding new fields or subfields, deleting fields or subfields, or editing the contents of existing fields and subfields. ILS then files the edited record in the MBF.

4.15.2 EI Step By Step

EDIT ITEM should follow this sequence of steps:

1. ITEM IDENTIFICATION
   Identify the item for which the record is to be edited.
2. EDIT ITEM RECORD
   Change or add to the MARC record in the MBF.
3. FILE ITEM
   File the changed record in the MBF or leave it unchanged.

For more HELP enter the number of the desired option or FORWARD to Special Features:

4.15.2.1 Identify Item

Items may be identified in various ways, including:

* using a barcode reader
* by item identification number
* by author
* by call number
* by ISSN/ISBN
* by Library of Congres number
* by title key
* by author/title key
* by series

For a detailed description of procedures and options for identifying an item, see the section "Identify Item" in the chapter GENERAL INFORMATION.

4.15.2.2 EI Edit Item Record

If the user is EDITING data already in the MBF the following sequence may occur.

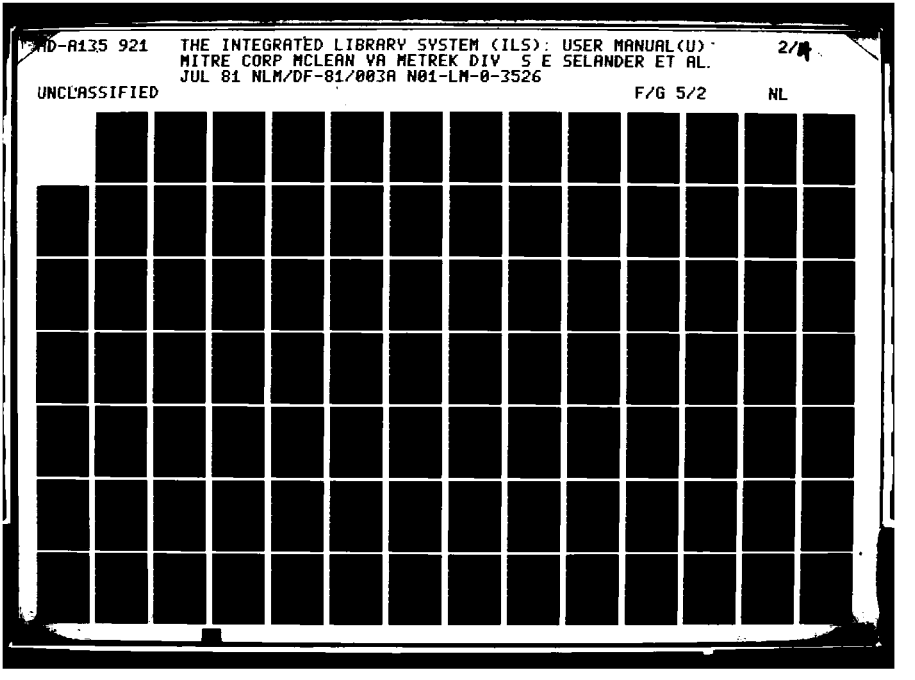
ILS will prompt:	User should enter:
TAG:	MARC tag number already in the record.
SUBFIELD:	Subfield code already in the record.
REPLACE:	Enter the characters which you wish to delete or replace.
WITH:	Enter the corrected data.

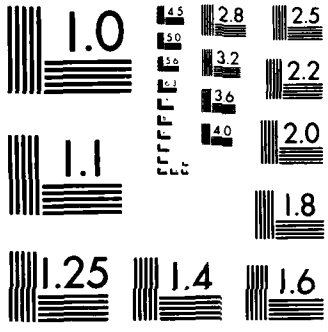
NOTE that ILS will replace the first matching character(s). If the subfield contains the text 'Medicined' and the user enters 'd' in response to REPLACE the result would be 'Me icined'.The user should enter 'ned' in response to REPLACE and 'ne' in response to WITH. This would result in 'Medicine'.

The user may add new data to a record in the MBF by following the steps below. If the user enters a tag number or a subfield code that is not currently in the record, the following sequence will occur.

ILS will prompt:	User should enter:
TAG:	MARC tag number (e.g., 050 or 245) Be sure to include leading zeroes
IN:	MARC indicator (two numerical characters) If not appropriate for this tag, press RETURN.
SUBFIELD:	Subfield code (e.g., a or b or z) This entry MUST be in lowercase letters.

ILS will prompt:	User should enter:
1>	Information to appear in this subfield.
2>	ILS will prompt for [illegible] third appearance [illegible] subfield [illegible] RETURN will cause TAG [illegible] reappear


AD-A135 921
THE INTEGRATED LIBRARY SYSTEM (ILS): USER MANUAL(U)
MITRE CORP MCLEAN VA METREK DIV S E SELANDER ET AL.
JUL 81 NLM/DF-81/003A N01-LM-0-3526
2/4
UNCLASSIFIED
F/G 5/2
NL



MICROCOPY RESOLUTION TEST CHART
NATIONAL BUREAU OF STANDARDS-1963-A

The sequences for entering or editing data will repeat until ILS prompts TAG: and the user answers RETURN. Then ILS will move to FILE ITEM.

For more information on FILE ITEM press 'F'.

4.15.2.3 EI File Item

If the user has answered a TAG: prompt with RETURN in the EDIT ITEM RECORD step, ILS will move to FILE ITEM and prompt:

(F)ile or (D)on't change / — The user may type 'F' to file the edited record in the MBF or type 'D' which will leave the original record unchanged in the MBF.

After the user enters 'F' or 'D' ILS will prompt ITEM: which allows the user to begin the EDIT ITEM process again.

4.15.3 EI Special Features

The ~ or 'up-arrow' has a special use in the EDIT ITEM function.

If the user does not use the wand and barcode label to identify the item, but instead uses a title, author or other search option, a match may not be found in the MBF. The user may enter ~ and ILS will prompt ITEM: allowing the user to start the EDIT ITEM process again.

4.16 ITEM DELETE

The ITEM DELETE procedure permits authorized users to permanently remove bibliographic records from the Master Bibliographic File (MBF) and from the activity record associated with each item.

AVAILABLE INFORMATION

1. Overview of Item Delete
2. Step by Step Procedures for Item Delete
3. Special Features for Item Delete

Please enter the number of the type of information you desire:

4.16.1 ID Overview

The ITEM DELETE function allows authorized users to permanently remove a bibliographic record from the Master Bibliographic File (MBF) and from the activity record associated with the item. It is used when weeding an item from the collection or removing the record of a lost item. The user first identifies the item whose record is to be deleted. The user can then delete a specific Volume, Issue, Part, Supplement or Copy. If the library only one copy of the item, the user can remove it entirely from the MBF.

4.16.2 ID Step By Step

ITEM DELETE will follow these steps:

1. ITEM ID - Identify the item to be deleted.
2. DELETE RECORD - Delete a specific Volume, Issue, Part, Supplement (VIPS) or copy of an item from the activity record or delete the entire record from the MBF.

For more HELP enter the number of the desired option or FORWARD to SPECIAL FEATURES:

4.16.2.1 Identify Item

Items may be identified in various ways, including:

* using a barcode reader
* by Library of Congres number

* by item identification number
* by author
* by call number
* by ISSN/ISBN
* by title key
* by author/title key
* by series

For a detailed description of procedures and options for identifying an item, see the section "Identify Item" in the chapter GENERAL INFORMATION.

4.16.2.2 ID Delete Record

ILS will display the title of the item to be deleted. If there are Volumes, Issues, Parts, Supplements (VIPS) or Copies of the item ILS will prompt for the specific item to be deleted. For example:

ILS will display:	User enters:
Diseases of the eye.	
VOLUME:	Number of the volume to be removed from the collection.
OR	
Journal of Radiology	
YEAR:	Last two numbers of the year of the issue.
MO:	Number of the month (Jan=1, etc.).
DAY:	Date of the issue.

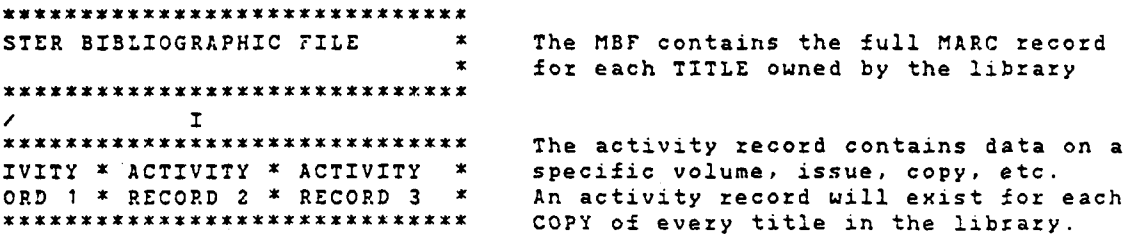
If the YEAR/MO/DAY prompts fail to identify the specific item, ILS will display a list of items which match. When the specific item has been positively identified:

ILS will prompt:	User enters:
ARE YOU SURE? NO/	RETURN to cancel the transaction or 'Y' to DELETE.
NO REMAINING VIPS OR COPIES, DELETE MBF RECORD AS WELL? NO/	RETURN to delete only the activity record or 'Y' to remove the item from the MBF entirely.

ILS will then prompt for ITEM: and you may delete another record.

4.16.3 ID Special Features

ITEM DELETE will remove records from the Master Bibliographic File or from the Activity Record associated with each item. It is important to understand the function of the MBF and the Activity Record.



The Master Bibliographic File contains the bibliographic data (in the form of a MARC record) for every title in the collection. The Activity Record is the record of each physical copy of each title in the collection.

4.17 THE DICTIONARIES

4.17.1 INTRODUCTION TO DICTIONARIES

The DICTIONARIES (DC) function allows authorized users to create and maintain various files used to support initial creation and subsequent searching of the Master Bibliographic File (MBF), the Authority File, and the various indexes. These functions are primarily used by the library at the time of implementation of ILS.

When entering DICTIONARIES, ILS asks:

WHICH DICTIONARY? User types in first few unique letters of desired dictionary or '/' to exit DC function

The following dictionaries exist:

(1) Authority Tag	(4) Item Tag	(7) Search Group
(2) Initial Article	(5) Language	(8) Stopword
(3) Interface Type	(6) Phrase	(9) Synonym

Press 1,2,3,4,5,6,7,8, or 9 to get HELP for a specific dictionary.

4.17.2 AUTHORITY TAG

The Authority Tag Dictionary is a list of all valid authority tags. It defines for each tag its name, its valid subfields, the number of repeats allowed in an authority record, and which subfields are used in the local Authority File. It is used as an authoritative reference file for cataloging staff, as well as in the actual creation and maintenence of the Authority File. In addition to MARC-defined authority tags, ILS allows libraries to define tags which carry local information.

As of 3/81, this function is not yet completely operational.

4.17.3 INITIAL ARTICLE

The INITIAL ARTICLE function allows authorized users to create a new initial article list; to add to, delete from or list the contents of an existing initial article list; or to delete an entire initial article list.

AVAILABLE INFORMATION

1. Overview of Initial Article
2. Step by Step Procedures for Initial Article

For more HELP, press 1 or 2.

4.17.3.1 INITIAL ARTICLE - Overview

The Initial Article Dictionary is comprised of several lists of initial articles for different languages. It is used in ILS to define initial articles to be ignored when either filing a title into or searching for a title in the Divided Catalog Index. The INITIAL ARTICLE function allows authorized users to create a new initial article list; to add to, delete from or list the contents of an existing initial article; or to delete an entire initial article list.

4.17.3.2 INITIAL ARTICLE - Step by Step

Upon entering INITIAL ARTICLE, ILS asks the user to enter the language name or code for the specific initial article list of interest. If the user enters an invalid language code or name, ILS informs her/him of that fact. If the user presses <Return> for English or enters a valid language code or name, ILS asks which function the user wishes to perform. The choices are:

(1) Add (user enters "a")
(1) Delete (user enters "d")
(2) Edit (user enters "e")
(2) List (user enters "l")

If there is no existing initial article list associated with the valid language name or code the user has entered, ILS creates a new list if the user subsequently chooses the ADD function.

For more HELP, enter the number of the desired function.

4.17.3.2.1 INITIAL ARTICLE - Add/Delete

Upon entering ADD, ILS displays:

INITIAL ARTICLE TO BE ADDED: User types in "article"

ILS adds "article" to the specified initial article list, informs

the user of that fact, and allows the user to enter another article to the specified list. If "article" is already in the initial article list, ILS informs the user of that fact and then allows the user to enter another "article".

Upon entering DELETE, ILS displays the entire contents of the specified initial article list and asks the user to indicate by its index # which specific article is to be deleted. After the user has entered the index #, ILS deletes the article from the list, informs the user that it has done so, and allows the user to delete another article from the same list.

4.17.3.2.2 INITIAL ARTICLE - Edit/List

Upon entering EDIT, ILS lists the entire contents of the specified initial article list and asks the user to indicate by its index # which specific article is to be edited. ILS then displays:

CHANGE "article" TO: User enters "revised article"

ILS changes "article" to "revised article", informs the user that it has done so, and allows the user to edit another article from the same list.

Upon entering LIST, ILS lists the entire contents of the specified initial article list.

4.17.4 INTERFACE TYPE

The INTERFACE TYPE function allows library staff to identify the kinds of online catalog searches that will be offered to each type of searcher. With this function users may add, edit, or delete search groups and search processing types, or list the search groups currently defined for a given interface type.

This function is under development and is not fully operational as of 1 July 1981.

4.17.5 ITEM TAG

The ITEM TAG function allows authorized users to add, delete, edit or list entries in the Item Tag Dictionary, a list of all valid OCLC tags and locally defined tags used in ILS.

AVAILABLE INFORMATION

1. ITEM TAG - Overview
2. ITEM TAG - Step by Step
3. ITEM TAG - Special Features

For more detailed HELP, press 1 or 2 or 3.

4.17.5.1 ITEM TAG - Overview

The Item Tag Dictionary is a list of all valid OCLC tags and locally defined tags. It defines for each tag its name, all valid subfields and the formats for which each subfield is valid, the number of repeats allowed in a bibliographic record, and whether the tag is used in the local Master Bibliographic File (MBF). It is used as an authoritative reference file for cataloging staff, as well as in the actual creation and maintenence of MBF. In essence, this dictionary defines the library's profile for selecting which fields and subfields from a library's OCLC tapes are extracted and transferred into the local MBF. In addition to OCLC tags, ILS allows individual libraries to define tags which carry locally defined information.

The ITEM TAG function allows authorized users to add, delete, edit or list entries in the Item Tag Dictionary. New tags may be defined, selected portions of existing tags may be edited, and/or entire tags may be deleted. For information in greater detail than can be provided in HELP, users are referred to Lister Hill Contractor Report CR 80-02, "A User's Guide to Maintaining the Master Bibliographic File of the Integrated Library System" by Sandy E. Anderson, MITRE Corp.

4.17.5.2 ITEM TAG - Step by Step

Upon entering ITEM TAG, ILS displays:

```
OCLC TAG ADD/EDIT/DELETE/LIST
ENTER OCLC TAG # :
```

The user enters a 3-character code (numeric for OCLC tags or alphabetic for locally-defined tags). If the code is not already in the Item Tag Dictionary, ILS assumes that the user is creating a new tag to be added to the dictionary and begins prompting the user for specified information. If the code is already defined in the Item Tag Dictionary, then the user may proceed to edit/list or delete that tag.

For more HELP on specific procedure, press the number of the desired option.

(1) Add a new tag to the Item Tag Dictionary
(2) Edit/list an existing tag in the Item Tag Dictionary

(3) Delete a tag from the Item Tag Dictionary

4.17.5.2.1 ITEM TAG - ADD new tag

Upon entering ITEM TAG, ILS displays:
ENTER OCLC TAG User types 'code'

If the user enters a 3-character 'code' which is not already in the Item Tag Dictionary, ILS assumes that the user wishes to add a new tag to the Item Tag Dictionary. The user must ente heading information about the tag as well as subfield code infor ion.

For more HELP, press the number of the desired opti
(1) Add heading information
(2) Add subfield code information

4.17.5.2.1.1 ITEM TAG - Add heading

ILS prompts for the heading information for the new tag.

TAG NAME:	User types 'name' to be associated with the tag (maximum of 60 characters).
LOCALLY USED? Y/	User types <Return> for YES or 'N' for NO. This determines whether some part of the contents of this tag is to be included in the local M3F.
MIIS NODE: (value)	If the user has entered a 3-digit numeric code for OCLC TAG #, ILS requires the user to also assign the value of the MIIS node. The MIIS node is a 1 or 2 character printable ASCII symbol whose value determines the physical order in which all tags are laid out in the bibliographic record. For more information about the significance of MIIS node, see the reference cited in ITEM TAG - Intro (press 'T' twice to get there). Numeric codes are generally reserved for valid OCLC tags. If the user enters a 3-alpha-character code, ILS automatically assigns the MIIS node value based on the 'code' entered by the user and whether the tag is locally used. Tags not used locally are assigned a MIIS node value of XXX, while tags used in the local M3F are assigned a value of 'code'. For more information about the significance of MIIS node, see reference cited in ITEM TAG - Intro (press 'T' twice to get there). Alphabetic codes are generally used for locally-defined tags.
# OF REPEATS: 1/	The user enters <Return> for 1 if there is only one occurrence of this tag in a bibliographic record. If more than one, the user enters the maximal number of occurrences allowed per record (maximum allowed is 99).

4.17.5.2.1.2 ITEM TAG - Add subfield

ILS now prompts for subfield specifications.

SFC: User enters subfield code. This is usually a single alphabetic character, although multi-character codes beginning with an alphabetic character are acceptable, e.g., "a2".

SFC NAME: User enters name of the subfield (maximum of 60 characters).

TYPE: User enters digit(s) from 1 - 6, denoting the type(s) of material for which this subfield is appropriate. Numbers are typed in consecutively without spaces between them.
(1) SER (2) BKS (3) A/V (4) MAP (5) MUS (6) MAN

LOCALLY USED? Y/ User enter <Return> for YES or 'N' for NO. This determines whether this particular subfield is carried in the local MBF.

ILS then allows the user to define the next subfield.

4.17.5.2.2 ITEM TAG - EDIT/LIST tag

After the user has entered a valid local tag code or a valid OCLC tag number, e.g., 245, ILS displays:

(E)DIT/LIST OR (D)ELETE OCLC TAG # 245 (TITLE STATEMENT)? E/

The user enters <Return> for Edit/List. ILS displays a chart of information about the specified tag and then allows the user to change the headings (e.g., change the name of the tag), add a new subfield, edit an existing subfield, or delete an existing subfield. For more HELP, press the number of the desired option.

(1) Chart display of specified tag
(2) Change the headings
(3) Add a subfield to specified tag
(4) Edit a subfield in specified tag
(5) Delete a subfield from specified tag

4.17.5.2.2.1 ITEM TAG - Tag chart

After specifying the desired tag in EDIT/LIST, ILS displays existing information about that tag. E.g., for OCLC tag #245, ILS displays (in part):

```
OCLC TAG: 245  MIIS NODE: I%        NAME: TITLE STATEMENT

AUTH TAG:      AUTH SG:             # REPEATS: 1   LOCALLY USED: YES

                                        MATERIAL TYPE
                                    (1) (2) (3) (4) (5) (6)
SFC NAME                            SER BKS A/V MAP MUS MAN  SG#S        LOC
a   SHORT TITLE/TITLE PROPER         Y   Y   Y   Y   Y   Y    14          Y
b   REMAINDER OF TITLE/SUBTITLE      Y   Y   Y   Y   Y   Y                Y
c   REMAINDER OF TITLE PAGE TRANSC   Y   Y   Y   Y   Y   Y                Y
  (etc. for other SFCs)
<RETURN>,'F','B' TO VIEW SUBFIELDS; '-' TO EXIT LIST; 'H' TO CHANGE HEADING;
ENTER 'A' TO ADD, 'E'+SFC, 'D'+SFC TO EDIT OR DELETE SUBFIELD CODES:
```

The instructions at the bottom of the chart specify the possible actions a user may take. 'F' causes the display of the subsequent sequence of subfields, 'B' causes the display of the preceding sequence of subfields, if all subfields cannot be displayed on a single screen. 'H' allows the user to edit heading information, i.e., the name of the tag, whether it is locally used, and the # of repeats. 'A' allows the user to add a new subfield to this field. 'E'+SFC allows the user to edit a particular subfield. 'D'+SFC allows the user to delete a subfield from this tag.

4.17.5.2.2.2 ITEM TAG - Edit heading

If the user enters 'H' for CHANGE HEADING in response to display of the tag chart, ILS prompts the user for possible changes. The name and current value of each heading are displayed and the user may leave the current value as is or enter a new value.

NAME: 'current name'/	User enters <Return> to retain the current name or enters the new name.
LOCALLY USED: 'current value'/	User enters <Return> to retain the curren value or enters the new value. 'YES' and 'NO' are the allowable choices.
MIIS NODE: 'current value'	The value of MIIS NODE is displayed, but cannot be changed by the user via this function.
# REPEATS: 'number'/	User enters <Return> to retain the curren number of repeats or enters a new number.

After completing changes to the headings, ILS displays the updated tag chart and allows the user to choose the next function she/he wishes to use.

4.17.5.2.2.3 ITEM TAG - Add subfield

If the user enters 'A' for ADD SUBFIELD CODE in response to display of the tag chart, ILS prompts the user for information about the subfield.

SFC: User enters a subfield code to identify the new subfield. SFCs must begin with an alpha character; they are usually single characters, although multi-character codes such as 'cm' or 'a1' are acceptable. If the user enters a SFC which already exists, ILS informs the user of that fact and allows the user to enter another SFC.

SFC NAME: User enters an appropriate name for the subfield (up to a maximum of 60 characters).

TYPE: User enters from 1-6 digits to indicate the type(s) of material(s) for which this subfield is appropriate. (1) SER (2) BKS (3) A/V (4) MAP (5) MUS (6) MAN Appropriate digits are entered consecutively without spaces.

LOCALLY USED? YES/ User enters <Return> for YES or 'N' for NO.

ILS adds the information specified above to the tag and then allows the user to enter another new SFC if desired. After all new SFCs have been added, ILS displays the updated tag chart and the user chooses the next function.

4.17.5.2.2.4 ITEM TAG - Edit subfield

If the user enters 'E'+SFC for EDIT SFC in response to the display of the tag chart, ILS first verifies which SFC the user indicated and then displays the name and current value of each piece of information about the SFC which the user may edit. The user may retain the current value or may enter a new value.

EDIT SUBFIELD 'code'? Y/	User enters <Return> if this is the correct SFC to edit or 'N' for NO.
NAME: 'current name'/	User enters <Return> to retain the current name or enters a new name.
SEARCH GROUP #(s):	ILS displays the current SG #(s) pertaining to this subfield. Search Group assignment can be changed only through the Search Group function.
TYPE(S): 'current numbers'/	User enters <Return> to retain the current list of numbers or enters a new list.
LOCALLY USED: 'current value'/	User enters <Return> to retain the current value or enters the new value. 'YES' and 'NO' are the possible choices.

ILS then files the revised version of the subfield, informs the user of that fact, displays the updated tag chart, and allows the user to choose the next function to perform.

4.17.5.2.2.5 ITEM TAG - Delete subfield

If the user enter 'D'+SFC for DELETE SFC in reponse to the display of the tag chart, ILS displays:

DELETE SUBFIELD 'code'? Y/ User enters <Return> if 'code' is the appropriate SFC or 'N' for NO.

If the user enters <Return>, ILS deletes the specific subfield from the tag, informs the user of that fact, displays the updated tag chart, and allows the user to choose the next function to perform. If the user is attempting to delete the last remaining subfield from a tag, ILS displays an error message, since a tag must have a least one subfield. The entire tag may be deleted by initially specifying the DELETE function instead of the EDIT function.

4.17.5.2.3 ITEM TAG - DELETE tag

After the user has entered a valid local tag code or a valid OCLC tag number, e.g., abc, ILS displays:

(E)DIT/LIST OR (D)ELETE OCLC TAG # abc ('name of tag abc')? E/

The user enters 'D' for DELETE. ILS displays:

DELETE OCLC TAG # abc ('name of tag abc')? N/

If the user enters <Return> for NO, ILS prompts for another OCLC tag # to process. If the user enters 'Y' for YES, ILS deletes the entire specified tag from the Item Tag Dictionary, informs the user of that fact, and then prompts the user for another OCLC tag # to process.

4.17.5.3 ITEM TAG - Special Features

ILS allows a library to define local tags in addition to the OCLC-defined tags. Local tags may contain any specialized local information which a library wishes to store in the bibliographic record, such as cataloging information for audiovisual hardware. A local tag is usually named by a 3-alpha-character code in the range of AAA through WZZ. Codes beginning with X, Y, or Z are reserved for internal ILS use. Local tags are added to the Item Tag Dictionary through use of the 'ADD new tag' option of the ITEM TAG function.

4.17.6 LANGUAGE

The LANGUAGE function alllows authorized users to add, delete, edit or list entries in the Language Dictionary.

AVAILABLE INFORMATION

1. Overview of Language
2. Step by Step Procedures for Language

For more HELP, press 1 or 2.

4.17.6.1 LANGUAGE - Overview

The Language Dictionary is a list of languages and their 3-letter mnemonics. It serves as a reference authority list for the language codes entered into the OCLC 008 language field. The LANGUAGE function allows authorized users to add, delete, edit or list entries in the Language Dictionary.

4.17.6.2 LANGUAGE - Step by Step

When entering LANGUAGE, ILS asks which operation the user wishes to perform. The choices are:

(1) Add (user enters 'a')
(2) Delete (user enters 'd')
(3) Edit (user enters 'e')
(4) List (user enters 'l')

For more HELP, enter the number of the desired option.

4.17.6.2.1 LANGUAGE - Add

Upon entering ADD, ILS displays:

LANGUAGE CODE: User must enter 3-letter code

If the language code already exists in the Language Dictionary, ILS informs the user of that fact. If the language code does not already exist in the Language Dictionary, ILS displays:

LANGUAGE NAME: User enters the full name of the langauge.

FILE? If the user enters 'Y' (YES), ILS files the new language and its code in the Language Dictionary. If the user enters 'N' (NO), the present transaction in deleted.

4.17.6.2.2 LANGUAGE - Delete

NOTE: Great care must be exercised when deleting an entry from the Language Dictionary, since stopword lists, phrase lists and initial articles lists associated with that language are automatically deleted.

Upon entering DELETE, ILS displays:

LANGUAGE CODE: User must type 3-letter code

ILS then displays the full name of the language corresponding to the code and asks if the user wishes to delete that language. If the user responds 'N' (NO), then the present transaction is deleted. If the user responds 'Y' (YES), ILS displays the message:

CHANGING THIS LANGUAGE CODE WILL CHANGE STOPWORD LIST OR PHRASE FILE! CHANGE?

If the user responds 'N' (NO), the present transaction is deleted. If the user reponds 'Y' (YES), ILS deletes the language and its 3-letter code from the Language Dictionary.

4.17.6.2.3 LANGUAGE - Edit

Great care must be taken when editing existing language codes, since stopword, phrase and initial article lists may exist for the language code the user intends to edit. When a language code is revised, any such lists associated with the original language code are automatically updated to become associated with the new language code.

The EDIT function allows users to change the 3-letter code and/or the full name of an entry in the Language Dictionary. Upon entering EDIT, ILS displays:

LANGUAGE CODE: User must type in 3-letter code. After receiving a '/' prompt from ILS, the user may press <Return> to keep the language code the same or the user may type the new 3-letter mnemonic.

LANGUAGE NAME: ILS displays the name of the language associated with the code originally typed in above. The user may press <Return> to retain that name or the user may type the new name.

4.17.6.2.4 LANGUAGE - List

Upon entering LIST, ILS displays:

LIST BY CODE OR NAME: If the user types 'C' (CODE), languages will be displayed alphabetically by their 3-letter mnemonic. If the user types 'N' (NAME), languages will be displayed alphabetically by their names.

LIST FROM: BEGINNING/ If the user presses <Return>, ILS displays the language names or codes from the beginning of the list. If the user types any sequence of characters, ILS displays the language names or codes starting at that sequence.

Entries from the Language Dictionary are displayed 7/screen. The user may browse forward ('F') or backward ('B') in the list to view additional entries.

4.17.7 PHRASE

The PHRASE LIST function allows authorized users to create new phrase lists, to list or edit the contents of existing phrase lists, or to delete entire phrase lists. Phrase lists are utilized during index building and searching.

AVAILABLE INFORMATION

1. Overview of Phrase
2. Step by Step Procedure for Phrase

For more HELP, press 1 or 2.

4.17.7.1 PHRASE - Overview

The Phrase List (PWL) is comprised of several lists of multi-word phrases whose identities are to be maintained during any keywording process. It is used in ILS in primarily two activities. In building the Keyword Index, PWL is used to ensure that the defined phrase in its entirety is entered into the Keyword Index, even if the phrse contains defined stopwords. Likewise, when a user enters a term search, PWL is consulted to check for defined phrases. The individual words of a defined phrase are also entered into the Keyword Index in the usual manner unless they are in the Stopword Dictionary.

Each PWL is associated with a specific language. Phrase lists may exist only for languages whose language code is defined in the Language Dictionary. Each language may have one or more phrase lists associated with it. E.g., there may be two separate phrase lists (corporate phrases and geographic phrases) defined for English; there may also be a phrase list defined for French, and another one for German. All phrase lists associated with a specific language are sequentially numbered by ILS at the time of their creation. In order to specify a phrase list, the user must specify both the associated language and the specific PWL number. The PHRASE function allows authorized users to create new phrase lists, to list or edit the contents of existing phrase lists, or to delete entire phrase lists.

4.17.7.2 PHRASE - Step by Step

When entering PHRASE, ILS asks for which language the user wishes to use the PHRASE function. After pushing <Return> for English or entering a valid language name or its 3-letter mnemonic, the user is then asked to enter the number of the specific phrase list desired. After the user enters the number of a defined phrase list, ILS displays the name of the phrase list and then asks the user which operation he/she wishes to perform. The choices are:

(1) Add (user enters 'a')
(2) Delete (user enters 'd')
(3) Edit (user enters 'e')
(4) List (user enters 'l')

For more HELP, enter the number of the desired option.

When the user is asked to identify the phrase list number, the user may enter "NEW" to initiate creation of a new phrase list. For more HELP on phrase list creation, press (5). If the user enters an undefined phrase list number, ILS alerts the user to that fact and then allows the user to create a new phrase list if desired.

4.17.7.2.1 PHRASE - Add

Upon entering ADD, ILS displays:

WORD TO BE ADDED: User types in 'word' to be added

If 'word' already exists in the specified phrase list, ILS displays:

DUPLICATION: THIS CODE ALREADY EXISTS

If 'word' does not already exist in the specified phrase list, ILS adds it to the list, confirms the fact that it has done so, and allows the user to add another word to the specified phrase list.

4.17.7.2.2 PHRASE - Delete

Upon entering DELETE, ILS asks if the user wishes to delete all the phrases in the identified phrase list. If the user enters 'Y' for YES, ILS asks if the user is sure. If the user enters another 'YES', ILS deletes the entire specified phrase list.

If the user does not wish to delete the entire phrase list and so indicates by typing 'N' for NO, then ILS prompts the user for each individual word to be deleted from the list. After the user types a 'word', ILS displays all entries in the specified phrase list which match 'word' and asks the user to indicate by its index # which entry is to be deleted. ILS then deletes the specified phrase, confirms the fact that it has done so, and allows the user to delete another phrase from the same phrase list.

4.17.7.2.3 PHRASE - Edit

The EDIT function allows the user to change the name of a specific phrase list and/or to edit individual entries in the list.

Upon entering EDIT, ILS displays:

EDIT THE LIST NAME? N/ User enters <Return> for NO or 'Y' for YES

If the user enters <Return> for NO, ILS proceeds to allow him/her to edit individual entries. If the user enters 'Y' for YES, ILS then displays:

CHANGE 'name' TO: User enters 'new name'

ILS changes the name of the list, informs the user of that fact, and then allows the user to edit individual entries. If 'new name' already exists as the name of another phrase list, ILS informs the user of that fact and allows him/her to enter another 'new name'.

ILS displays:

WORD TO BE EDITED: User types in 'word' to be edited

If 'word' has no matching entries in the specified phrase list, ILS informs the user of that fact and prompts for another word. If there are matching entries, ILS displays them and asks the user to indicate by its index # which word the user wishes to edit. ILS then displays:

CHANGE 'word' TO: User enters 'revised word'

ILS confirms the fact that is has changed 'word' to 'revised word' and then allows the user to edit another entry.

4.17.7.2.4 PHRASE - List

Upon entering LIST, the user is asked if she/he wishes to list the entire specified phrase list. If the user enters <Return>, ILS begins to display the entries of the specified phrase list, beginning with the first entry. If the user enters 'N' for NO, ILS displays:

LIST SWL FOR: User enters the word or characters at which listing should commence. ILS then lists the entries of the specified phrase list beginning with the word the user enters.

4.17.7.2.5 PHRASE - Create new list

After entering PHRASE and specifying the language of the desired list, ILS prompts for phrase list number. If the user type 'NEW', ILS creates a new phrase list, automatically assigns its number, and asks the user to type the name of the list. ILS displays the name and the assigned number of the list, and then prompts the user to type in phrases to be added to the new list. As each phrase is entered, ILS confirms the fact that it has been added and then allows the user to add another phrase to the list.

4.17.8 SEARCH GROUP

The SEARCH GROUP function allows authorized users to create new search groups, edit existing search groups, or delete entire search groups in the Search Group Dictionary. Search groups are involved in the creation and maintenance of the Authority File and the searching indexes.

AVAILABLE INFORMATION

1. SEARCH GROUPS - Overview
2. SEARCH GROUPS - Step by Step

For more detailed HELP, press the number of the desired option.

4.17.8.1 SEARCH GROUPS - Overview

The Search Group Dictionary consists of a list of library-defined Search Groups and all bibliographic tags which comprise each Search Group. This dictionary maintains the Authority File and the searching indexes. When bibliographic records are added to he Master Bibliographic File (MBS), the Item Tag Dictionary is consulted to determine to which Search Group(s) (if any) each tag belongs. Then the Search Group Dictionary is consulted in order to determine if the data from that tag is authority-controlled and/or if data from that tag is indexed in the Keyword Index and/or the Divided Catalog Index. Similar tags are grouped together into defined Search Groups, e.g., an Author Search Group might consist of any name which originates in the 100 field, the 400 field, the 700 field, or the 800 field. Thus, if a patron does an author search for the name 'Milton', the above search group definition would have created indexes such that any occurrence of 'Milton' in tags 100, 400, 700, or 800 would be retrieved.

The SEARCH GROUP function allows authorized users to create new search groups, edit existing search groups, or delete entire search groups in the Search Group Dictionary. Decisions about search group definitions are made at the time of implementation of ILS. Although the Search Group Dictionary may be modified at a later time, such changes must be executed with care, since search group definitions determine the contents of the Authority File and the searching indexes.

4.17.8.2 SEARCH GROUPS - Step by Step

Upon entering SEARCH GROUP, ILS displays:

(A)DD, (D)ELETE, (E)DIT, OR (L)IST SEARCH GROUP: User must enter the first letter of the desired function.

For more detailed HELP, press the number of the desired option below.

(1) ADD a new search group to the Search Group Dictionary
(2) DELETE a search group from the Search Group Dictionary
(3) EDIT the contents of an existing search group in the Search Group Dictionary
(4) LIST all the search groups in the Search Group Dictionary

4.17.8.2.1 SEARCH GROUPS - Add search group

Adding a new search group to the Search Group Dictionary requires the user to enter specific indexing information (whether tags from this search group are to be entered into the Authority File and/or the searching indexes) and specific information about which tags are to comprise the search group and how data in that tag is to be treated (e.g. if data is to be run against a stopword list or an initial article list before indexing occurs).

For more detailed HELP, press the number of the desired option below.

1. Add indexing information for new search group
2. Add tag information for new search group

4.17.8.2.1.1 SEARCH GROUPS - Add indexing info

Upon entering ADD, ILS displays:

NEW SEARCH GROUP NUMBER IS x — ILS automatically assigns the appropriate sequential number to the new search group.

SEARCH GROUP NAME: — User must enter an appropriate name for the new search group. If the user enters a name which has already been assigned to an existing search group, ILS informs the user of that fact, and allows the user to enter another name.

AUTHORITY SEARCH GROUP? NO/ — User enters <Return> for NO if this search group does not determine entry of specified tag data into the Authority File. User enters 'Y' for YES if this search group does control entry of data into the Authority File.

CONTROLLED BY AUTHORITY SEARCH GROUP? — If online catalog searches with Search Group are to use the Authority File, answer 'Y' for YES. If the user has defined this as an authority search group, then ILS automatically answers YES to this question and proceeds.

INDEX KEYWORDS? NO/ — User enters <Return> for NO if data from the tags in this search group are not to be entered into the Keyword Index. User enters 'Y' for YES

if data from the tags in this search group are to be indexed in the Keyword Index.

WORD ADJACENCY? NO/ If the user has indicated that data from tags in this search group are not to be entered into the Keyword Index, ILS automatically answers NO to this question and proceeds. If data are to be entered into the Keyword Index, user enters 'Y' for YES if information about the position of the word in the phrase is to be carried in the Keyword Index. User enters 'N' for NO if positional information is not to be carried in the Keyword Index. This function is non-operational as of 2/81.

INDEX TERMS? NO/ User enters <Return> for NO if data from tags in this search group are not to be entered into the Divided Catalog Index. User enters 'Y' for YES if data are to be added to the Divided Catalog Index.

For each defined search group, data from tags must be indexed in Keyword Index and/or Divided Catalog Index. If the user answers NO to both, ILS displays an error message and allows the user to re-enter her/his responses.

4.17.8.2.1.2 SEARCH GROUPS - Add tag info

After indexing information has been defined, ILS prompts the user for specific tag and subfield information. This defines which tags and subfields are to be included in the specified search group. ILS displays:

TAG: User enters a valid 3-character tag as defined in the Item Tag Dictionary. ILS displays the name of the tag and proceeds. If the user enters a tag that is not defined in the Item Tag Dictionary, ILS informs her/him of that fact and allows the user to enter another tag.

SUBFIELD CODE: User enters a valid subfield code as defined for the tag in the Item Tag Dictionary. ILS displays the name of the subfield and proceeds. If the user enters a subfield code not defined in the Item Tag Dictionary, ILS informs the user of that fact and allows her/him to enter another subfield code.

After a valid tag and subfield have been specified, ILS prompts for how data in that subfield are to be treated during indexing. ILS displays:

STOPWORD LIST #: User enters <Return> for none or the number of a defined Stopword List to be applied to the data of this subfield when it is indexed in the key word index.

PHRASE LIST #: User enters <Return> for none or the number of a defined Phrase List to be applied to the data of this subfield when it is indexed in the key word index.

In both cases, ILS displays the name of the list and proceeds. If the user enters an undefined number, ILS informs the user of that fact and allows her/him to enter another number. Stopword List and Phrase List specification

apply to keyword indexing only. ILS continues:

INITIAL ARTICLE LIST? NO/ User enters <Return> for NO or 'Y' for YES. This determines whether or not initial articles are stripped before indexing titles in the Divided Catalog Index.

STRIP NON-ALPHABETICS? NO User enters <Return> for NO or 'Y' for YES. This determines whether non-alphabetic strings resulting from keywording a phrase (e.g., a date) are to be discarded.

SUBFIELD INFORMATION OK? YES/ User reviews the above entered information to verify that it is correct. If the user enters 'N' for NO, then all the user-supplied information is erased and the user may re-enter required data. If the user enters <Return> for YES, ILS then allows the user to continue by adding another subfield. After all desired subfields have been entered, then the user may enter another tag to be included in this search group. When the user has defined all tags and enters <Return> in reponse to a new tag prompt, ILS displays:

FILE? User enters 'Y' for YES or 'N' for NO. 'Y' causes ILS to permanantly store the new search group. The user may then proceed to create another new search group. If the user enters 'N', ILS erases all of the above entered information and allows the user to re-enter the data if desired.

4.17.8.2.2 SEARCH GROUPS - DELETE

Upon entering DELETE, ILS displays:

SEARCH GROUP: User must enter the number of a valid search group. Entering a '?' will cause all search groups and their numbers to be displayed in alphabetical order by search group name; the user can then indicate by its index number which search group is to be deleted. After the user has chosen a specific search group, ILS displays a table of information about the search group for verification purposes. ILS then displays:

DELETE? NO/ If the user enters <Return> for NO, ILS ignores the delete transaction and allows the user to specify another search group to be deleted. If the user enters 'Y' for YES, ILS deletes that search group from the Search Group Dictionary and allows the user to delete another search group if desired.

4.17.8.2.3 SEARCH GROUPS - EDIT

Upon entering EDIT, ILS displays:

SEARCH GROUP: User enters a valid search group number or '?' to see a list of all existing search groups from which the user may choose a specific search group by its index #.

ILS then displays a chart of information about the specified search group. The user may then proceed to change the headings of the table,

add new tags to the search group, edit an existing tag (add, delete or edit subfields) or delete a tag from the search group.

For more detailed HELP, press the number of the desired option.

1. Search Group Chart
2. Change the headings
3. Add new tag to search group
4. Edit existing tag in search group
5. Delete a tag from the search group

4.17.8.2.3.1 SEARCH GROUPS - Chart

After specifying the desired search group in EDIT, ILS displays existing information about that search group. For Search Group #1, ILS displays:

```
SEARCH GROUP NAME: PERSONAL NAME                    SEARCH GROUP #: 1
AUTHORITY SEARCH GROUP: YES                  AUTHORITY CONTROLLED: YES
INDEX KEYWORDS: YES   WORD ADJACENCY: NO       INDEX TERMS: YES
INTERFACE TYPES                              SEARCH GROUP TYPES

    SUBFIELD   STRIP INITIAL   STOPWORD LIST   PHRASE LIST     STRIP
TAG   CODE       ARTICLES?     # DESCRIPTION  # DESCRIPTION  NON-ALPHAS?
100     a          NO                                          NO
400     a          NO                                          NO
700     a          NO                                          NO
800     a          NO                                          NO
'-' TO EXIST LIST; 'H' TO CHANGE HEADINGS;
ENTER 'A' TO ADD TAG; 'E'+TAG,'D'+TAG TO EDIT OR DELETE TAG:
```

The instructions at the bottom of the chart specify the possible actions a user may take. 'H' allows the user to edit heading information, i.e., the name of the search group, whether it is an authority search group, etc. 'A' allows the user to add a new tag to the search group. 'E'+tag allows the user to edit the information about an already existing tag, e.g., adding another subfield from the tag. 'D'+tag allows the user to delete a particular tag from the specified search group.

4.17.8.2.3.2 SEARCH GROUPS - Edit heading

Upon entering 'H' after display of the Search Group Chart, ILS prompts the user for changes in each of the elements comprising the Chart headings. ILS displays:

```
SEARCH GROUP NAME: 'present name'/   User enters <Return> to retain
                                     'present name' or enters a new name.
SEARCH GROUP #: 'number'      ILS displays the Search Group #, but it is
                              not modifiable using this function.
AUTHORITY SEARCH GROUP? 'present value'/                 User enters <Return>
CONTROLLED BY AUTHORITY SEARCH GROUP? 'present value'/   to retain 'present
INDEX KEYWORDS? 'present value'/                         value' or enters
WORD ADJACENCY? 'present value'/                         a new value.  The
INDEX TERMS? 'present value'/                            possible values are
                                                         'YES' and 'NO'.
```

FILE? If the user enters 'Y' for YES, ILS files the changes in the Search Group Dictionary. If the user enters 'N' for NO, ILS deletes the present transaction. ILS then displays the (perhaps updated) Search Group Chart.

4.17.8.2.3.3 SEARCH GROUPS - Add tag

Upon entering 'A' in response to the Search Group Chart, ILS prompts the user for all information required to add a new tag to the specified search group. ILS displays:

TAG: User enters a valid 3-character tag as defined in the Item Tag Dictionary. ILS then displays the name of the tag.

SUBFIELD CODE: User enters a valid subfield code. ILS displays the name of the subfield.

STOPWORD LIST #: User enters the number of the Stopword List (if any) against which data from this subfield will be passed during the indexing process. ILS displays the name of the Stopword List. If there is no Stopword List, user enters <Return> to continue.

PHRASE LIST #: User enters the number of the Phrase List (if any) against which data from this subfield will be passed during the indexing process. ILS displays the name of the Phrase List. If there is no Phrase List, user enters <Return> to continue.

INITIAL ARTICLE LIST? NO/ User enters <Return> for NO if data from this subfield is not to be run against the Initial Article List during the indexing process. User enters 'Y' for YES if data will be run against the Initial Article List.

STRIP NON-ALPHABETICS? NO/ User enters <Return> for NO if non-alphabetic strings resulting from keyword indexing are to be entered into the Keyword Index. User enters 'Y' for YES if such strings are to be discarded.

SUBFIELD INFORMATION OK? YES/ If the user enters 'N' for 'NO', ILS erases all of the above information supplied by the user and allows the user to re-enter the data. If the user enters <Return> for YES, ILS then displays:

FILE? If the user enters 'N' for NO, ILS deletes all the information supplied above. If the user enters 'Y' for YES, ILS adds the new tag to the specified search group in the Search Group Dictionary. ILS then displays the updated Search Group Chart.

4.17.8.2.3.4 SEARCH GROUPS - Edit tag

Upon entering 'E'+tag in response to display of the Search Group Chart for a specified search group, ILS allows the user to edit tags belonging to that search group. ILS displays:

TAG: 'tag code'/ User enters <Return> to retain the tag code. ILS displays the name of the tag. The user may enter a new tag code, but the subfields defined for the previous tag must also be valid for the new tag.

SUBFIELD CODE: User enters the code for an existing subfield. ILS immediately displays a '/'. The user enters a <Return> to retain the subfield code previously entered. ILS displays the name of the subfield. The user may change the code by entering a valid new subfield code.

Now that a specific tag and subfield have been identified, ILS prompts the user for how data from that subfield is to be processed.

ILS displays:

STOPWORD LIST #: 'present value'/ User enters <Return> to retain 'present value' or enters the number of another Stopword List. ILS displays the name of the Stopword List.

PHRASE LIST #: 'present value'/ User enter <Return> to retain 'present value' or enters the number of another Phrase List. ILS displays the name of the Phrase List.

INITIAL ARTICLE LIST APPLIED? 'present value'/ User enters <Return> to keep 'present value' or enters a new value. The two valid values are 'YES' and 'NO'.

STRIP NON-ALPHABTICS? 'present value'/ User enters <Return> to retain the 'present value' or enters a new value. The two valid values are 'YES' and 'NO'.

After the above information has been entered, ILS asks:

FILE? If the user enters 'Y' for YES, ILS files the above information into the Search Group Dictionary. If the user enters 'N' for NO, ILS deletes the above transactions and allows the user to re-enter the information if desired.

4.17.8.2.3.5 SEARCH GROUPS - Del tag

Upon entering 'D'+tag in response to the Search Group Chart, ILS displays:

DELETE TAG: 'tag number' - 'tag name' ILS displays the number and name of the specified tag for verification purposes.

ARE YOU SURE? NO/ If the user enters <Return> for NO, ILS ignores the transaction and displays the Search Group Chart again. If the user enters 'Y' for YES, ILS deletes that tag from the Search Group and displays the updated Search Group Chart.

4.17.8.2.4 SEARCH GROUPS - LIST

Upon entering LIST, ILS displays the names of all existing Search Groups in alphabetical order, along with their Search Group #'s and their

Index #'s. The Index # is simply a numeric sequential number that provides the user an alternative way of identifying a specific Search Group in several of the Search Group functions.

4.17.9 STOPWORD

The STOPWORD function allows authorized users to create new stopword lists, to list or edit the contents of existing stopword lists, or to delete entire stopword lists. Stopword lists are utilized in ILS during the creation and searching of the searchng indexes.

AVAILABLE INFORMATION

1. Overview of Stopword
2. Step by Step Procedure for Stopword

For more HELP, press 1 or 2.

4.17.9.1 STOPWORD - Overview

The Stopword List is comprised of several lists of defined words or phrases to be ignored during ILS processing of user, patron, or bibliographic input. Stopwords in general are common high-frequency words which in themselves carry little meaning, e.g., the words "and," "for," or "Mr." and are therefore not useful as searching terms. The Stopword List is used in ILS in primarily two activities. In building the Keyword Index, the Stopword List is consulted in order to eliminate the keywording of defined stopwords.

Every Stopword List is associated with a specific language. Stopword lists may exist only for languages whose language code is defined in the Language Dictionary. Each language may have one or more stopword lists associated with it. E.g., there maybe three separate stopword lists (common words, abbreviations, and geographic terms) defined for English; there may also be a stopword list of common words defined for French, and another one for German. All stopword lists associated with a specific language are sequentially numbered by ILS at the time of their creation. In order to specify a specific stopword list, the user must specify both the associated language and the specific SWL number.

The STOPWORD function allows authorized users to create new stopword lists, to list or edit the contents of existing stopword lists, or to delete entire stopword lists.

4.17.9.2 STOPWORD - Step by Step

When entering STOPWORD, ILS asks for which language the user wishes to use the STOPWORD function. After pushing <Return> for English or entering a valid language name or its 3-letter mnemonic, the user is then asked to enter the number of the specific stopword list desired. After the user enters the number of a defined stopword list, ILS displays the name of the stopword list and then asks the user which operation he/she wishes to perform. The choices are:

(1) Add (user enters 'a')
(2) Delete (user enters 'd')
(3) Edit (user enters 'e')
(4) List (user enters 'l')

For more HELP, enter the number of the desired option.

When the user is asked to identify the stopword list number, the user may enter "NEW" to initiate creation of a new stopword list. For more HELP on stopword list creation, press (?). If the user enters an undefined stopword list number, ILS alerts the user to that fact and then allows the user to create a new stopword list if desired.

4.17.9.2.1 STOPWORD - Add

Upon entering ADD, ILS displays:

WORD TO BE ADDED: User types in 'word' to be added

If 'word' already exists in the specified stopword list, ILS displays:

DUPLICATION: THIS CODE ALREADY EXISTS

If 'word' does not already exist in the specified stopword list, ILS adds it to the list, confirms the fact that it has done so, and allows the user to add another word to the specified stopword list.

4.17.9.2.2 STOPWORD - Delete

Upon entering DELETE, ILS asks if the user wishes to delete all the words in the identified stopword list. If the user enters 'Y' for YES, ILS asks if the user is sure. If the user enters another 'YES', ILS deletes the entire specified stopword list.

If the user does not wish to delete the entire stopword list, and so indicates by typing 'N' for NO, then ILS prompts the user for each individual word to be deleted from the list. After the user types a word, ILS displays all entries in the specified stopword list which match the word and asks the user to indicate by its index # which word is to be deleted. ILS then deletes the specified word, confirms the fact that it has done so, and allows the user to delete another word from the same stopword list.

4.17.9.2.3 STOPWORD - Edit

The EDIT function allows the user to change the name of a specific stopword list and/or to edit individual entries in the list.

Upon entering EDIT, ILS displays:

EDIT THE LIST NAME? N/ User enters <Return> for NO or 'Y' for YES

If the user enters <Return> for NO, ILS proceeds to allow him/her to edit individual entries. If the user enters 'Y' for YES, ILS then displays:

CHANGE 'name' TO: User enters 'new name'

ILS changes the name of the list, informs the user of that fact,

and then allows the user to edit individual entries. If 'new name' already exists as the name of another stopword list, ILS informs the user of that fact and allows him/her to enter another 'new name'.

ILS displays:

WORD TO BE EDITED: User types in 'word' to be edited

If 'word' has no matching entries in the specified stopword list, ILS informs the user of that fact and prompts for another word. If there are matching entries, ILS displays them and asks the user to indicate by its index # which word the user wishes to edit. ILS then displays:

CHANGE 'word' TO: User enters 'revised word'

ILS confirms the fact that is has changed 'word' to 'revised word' and then allows the user to edit another entry.

4.17.9.2.4 STOPWORD - List

Upon entering LIST, the user is asked if she/he wishes to list the entire specified stopword list. If the user enters <Return>, ILS begins to display the entries of the specified stopword list, beginning with the first entry. If the user enters 'N' for NO, ILS displays:

LIST SWL FOR: User enters the word or characters at which listing should commence. ILS then lists the entries of the specified stopword list beginning with the word the user entered.

4.17.9.2.5 STOPWORD - Create new list

After entering STOPWORD and specifying the language of the desired list, ILS prompts for stopword list number. If the user type 'NEW', ILS creates a new stopword list, automatically assigns its number, and asks the user to type the name of the list. ILS displays the name and the assigned number of the list, and then prompts the user to type in words to be added to the new list. As each word is entered, ILS confirms the fact that it has been added and then allows the user to add another word to the list.

4.17.10 SYNONYM

The function SYNONYM allows authorized users to add, delete, edit or list words in the Synonym Dictionary. The Synonym Dictionary serves as an aid in catalog searching to suggest additional or alternative searching terms to the user.

AVAILABLE INFORMATION

1. Overview of Synonym
2. Step by Step Procedures for Synonym

For additional HELP, press 1 or 2.

4.17.10.1 SYNONYM - Overview

The Synonym Dictionary is a list of defined synonyms for any given word, phrase, or abbreviation. The Synonym Dictionary may be viewed by the patron to suggest additional or alternative search terms. The file is not accessed automatically in the search process, but is intended as a user aid only.

The function SYNONYM is used to add, delete, edit or list words in the Synonym Dictionary. An entry in the Synonym Dictionary consists of a root word its list of synonyms. Each word in the list of synonyms is automatically displayed as a synonym of the root word and, similarly, the root word is automatically displayed as a synonym for each of the words in its synonym list. However, words within a given list of synonyms are not displayed as synonyms for each other unless so defined explicitly.

For example,

Root Word	List of Synonyms
children	boys,brats,girls,kids,tots
boys	brats,males
girls	females

The synonyms displayed for children are: boys,brats,girls,kids,tots.
The synonyms displayed for boys are: brats,children,boys.
The synonyms displayed for girls are: children,females.
The synonyms displayed for kids are: children.
The synonyms displayed for tots are: children.

4.17.10.2 SYNONYM - Step by Step

When entering SYNONYM, ILS asks which operation the user

wishes to perform. The choices are:

```
(1) Add      (user enters 'a')
(2) Delete   (user enters 'd')
(3) Edit     (user enters 'e')
(4) List     (user enters 'l')
```

For more HELP, enter the number of the desired option.

4.17.10.2.1 SYNONYM - Add

Upon entering ADD, ILS displays:

WORD TO BE ADDED TO SYNONYM LIST: User types in 'word' to be added

If the word does not already exist in the Synonym Dictionary, ILS next asks the user to type in a synonym. After ILS confirms that it has accepted that synonym, ILS then asks the user to type in another synonym. The user may add as many synonyms as necessary by this procedure.

If the word already exists in the Synonym Dictionary, ILS informs the user of that fact, lists all the existing synonyms for that word, and then allows the user to enter additional synonyms for that word according to the procedure in the preceding paragraph.

4.17.10.2.2 SYNONYM - Delete

Upon entering DELETE, ILS displays:

WORD TO BE DELETED: User types in 'word' to be deleted

ILS then displays all matching entries from the Synonym Dictionary and asks the user to choose the desired entry by its index #. After the user has entered the index #, ILS displays all synonyms associated with the word and asks if the user wants to delete the entire list of synonyms associated with that word.

DELETE WHOLE LIST OF SYNONYMS FOR 'Word'? Y/

If the user responds with <Return> or 'Y' for yes, ILS deletes all synonyms associated with the word and informs the user of that fact. If all synonyms associated with the word have been deleted, then that word itself is no longer in the Synonym Dictionary.

If the user responds 'N' for No, then ILS asks the user to specify by its index # which specific synonym the user wishes to delete. As the user

deletes a specific synonym, ILS confirms that it has been deleted and then allows the user to delete another synonym from the list. As long as there is at least one synonym associated with the word, the word and its synonym remain in the Synonym Dictionary; if the user deletes the last remaining synonym, then both the word and its synonym are deleted from the Synonym Dictionary.

4.17.10.2.3 SYNONYM - Edit

Upon entering EDIT, ILS displays:

WORD TO BE EDITED OR REVISED: User types in 'word'

ILS then displays all matching entries in the Synonym Dictionary and asks the user to choose the desired entry by its index #. After the user has entered the index #, ILS asks her/him to type in the revised form of the word.

CHANGE 'word' TO: User types in 'revised word'

After the user enters the 'revised word', ILS displays all synonyms associated with 'word' and asks if the user wishes to edit the whole list of synonyms for 'word'. If the user enters <Return> or 'Y' for Yes, then all of the synonyms previously associated with 'word' now become associated with 'revised word', and 'word' is deleted from the Synonym Dictionary. If the user enters 'N' for No, then ILS asks the user to specify by its index # which specific synonym she/he wishes to be associated with 'revised word'. Both 'word' and 'revised word' remain in the Synonym Dictionary as long as at least one synonym remains associated with each.

If 'revised word' is already defined as a synonym for 'word', ILS informs the user of that fact and asks if the user wants to continue with the change. If the user enters 'N' for No, ILS disregards the transaction and asks for another word to be edited. If the user enters 'Y' for Yes, then the 'revised word' becomes the root word, all entries in the synonym list become associated with it, and 'word' is deleted from the Synonym Dictionary.

4.17.10.2.4 SYNONYM - List

Upon entering LIST, ILS displays:

DISPLAY SYNONYM LIST FOR: User types 'word'

ILS then displays all matching entries in the Synonym Dictionary and asks the user to choose the desired entry by its index #. After entering the index #, ILS then displays the list of synonyms associated with the word. If there are no matching entries in the Synonym Dictionary, ILS informs the user of that fact and prompts the user to enter another word.

4.18 CATALOG REVIEW

4.18.1 CATALOG REVIEW

The CATALOG REVIEW procedure allows authorized users to review bibliographic records added directly to the Master Bibliographic File by the PROCESS OCLC TAPE function.

AVAILABLE INFORMATION

1. Overview of Catalog Review

2. Step by Step Procedures for Catalog Review

Please enter the number of the type of information you desire:

4.18.2 CR Overview

CATALOG REVIEW is a process by which a librarian may review the bibliographic records added directly to the Master Bibliographic File by the PROCESS OCLC TAPE function. All such records will have been fully entered in the MBF and indexed for searching through the online catalog; the librarian uses the CATALOG REVIEW function to verify that the bibliographic information is accurate and to approve correct records or edit invalid data.

4.18.3 CR Step By Step

CATALOG REVIEW consists of these steps:

1. IDENTIFY REVIEW DATE - Identify which records you want to review based on the date they were added to the file.

   Then choose one of the following options:

2. DELETE REVIEW FILE ENTRIES - Delete the review file for a particular date, if all records are correct and need no further review.

3. REVIEW NEW BIBLIOGRAPHIC RECORDS - Review all bibliographic records added on the chosen date.

4. REVIEW DUPLICATE BIBLIOGRAPHIC RECORDS - Review added records which duplicated records already present in the Master Bibliographic File.

For more HELP enter the number of the desired option.

4.18.3.1 CR Identify review date

The first step in performing CATALOG REVIEW is to identify the date to be reviewed. ILS will prompt "DATE:". A "?" will cause ILS to list the dates on which bibliographic records were loaded from MARC tape(s), in the following format:

INDEX #	DATE	RECORDS
1	07/21/81	51
2	07/22/81	312

The user enters the index number of the date to be reviewed; then ILS will display details of the records loaded on that day, as follows:

CATEGORY	TOTAL	APPROVED	REMAINING
NEW BIB REC	51	0	51
DUP BIB REC	0	0	0
TOTAL	51	0	51

4.18.3.2 CR Delete review file entries

This step allows you to clear out the review file for a particular date if no more review is required. The associated bibliographic records remain in the MBF and indexes, but will no longer be listed in CATALOG REVIEW as needing review. Use this option when you are satisfied that the newly-added records are accurate.

ILS will prompt:	User should enter:
DELETE ALL ENTRIES FOR (DATE) FROM THE REVIEW FILE ? N/	'Y'es to delete the review file when review is complete Carriage return or 'N'o to retain the review file for further use

4.18.3.3 CR Review new records

If the user chooses to review new records added on the chosen date, ILS will begin to display the records one at a time, in the order in which they were loaded from tape. Each record is displayed in a MARC format, and the reviewer is given the option to edit, approve, or view the next record:

OPTIONS - E)DIT, A)PPROVE, OR N)EXT? N/

To EDIT, the reviewer must answer E to this question, then identify the tag and subfield to be changed and enter the correction. The edited record can then be filed and approved. To APPROVE the record, the reviewer enters A at this point to indicate that the record is correct and needs no further review. To see the NEXT record without approving or editing the current one, the reviewer enters carriage return or N to this question.

ILS keeps a running total of the records approved, and at each subsequent review session displays only the records which still need review (i.e., which have not been approved).

4.18.3.4 CR Review duplicate records

If ILS determines that a new bibliographic record duplicates one already present in the MBF, the new record replaces the old one and both may be viewed through CATALOG REVIEW. For each duplicate pair, ILS displays the numbers of the tags which were identical and those which were present in one record but not the other. ILS also displays the tags which were present in both records but whose data were different.

After viewing this summary of the duplication, the reviewer chooses one of the following options:

OPTIONS - V)IEW, R)ECOVER, A)PPROVE, OR N)EXT? N/

VIEW allows the reviewer to look at the full record in the MBF (the "new" record) or in the Review File (the "old" record). RECOVER lets the reviewer retrieve the data from the old record: the replaced tags only, the deleted tags only, or the whole record. APPROVE indicates that the replacement is correct, and the old record is deleted. NEXT displays the next duplicate pair.

4.19 AUTHORITY MAINTENANCE

4.19.1 AUTHORITY MAINTENANCE

The AUTHORITY MAINTENANCE functions allow authorized users to update online the ILS authority file and associated bibliographic records.

AVAILABLE INFORMATION

1. AM Overview
2. AM Options
3. AM Special Features

For more information, enter the appropriate number.

4.19.2 AM Overview

The AUTHORITY MAINTENANCE functions update the authority file which supports online catalog searching. Using this feature, a librarian may edit an authority record, merge an invalid authority record into a valid record, and maintain cross-references. Affected bibliographic records are updated immediately.

For a more detailed description of AUTHORITY MAINTENANCE, enter F to see AM Options.

4.19.3 AM Options

There are three options available through AUTHORITY MAINTENANCE:

1. EDIT AUTHORITY RECORD - to change the text of an authority heading or to add/edit notes.
2. MERGE AUTHORITY RECORDS - to replace an invalid authority record by a valid one throughout the catalog.
3. CROSS-REFERENCE ADD/DELETE - to create or delete a See or See Also reference to an existing authority record.

For a detailed description, enter the appropriate number.

4.19.3.1 AM Edit authority record

The EDIT AUTHORITY RECORD option allows a librarian to update the text of

an existing authority record, or to add or edit notes or other information, by following these steps:

1. IDENTIFY THE AUTHORITY TYPE - indicate whether the record to be edited is a personal name, topical subject, etc.

2. IDENTIFY THE DESIRED RECORD - enter the authority as known and select from the appropriate index. ILS will display the full authority record once selected.

3. ENTER UPDATED INFORMATION - identify tag to be changed or added, and enter correct data.

NOTE: Cross-references may not be changed using this option; use CROSS-REFERENCE ADD/DELETE.

4.19.3.2 AM Merge authority records

The MERGE AUTHORITY RECORDS option replaces an invalid authority record with a valid authority. All associated bibliographic records are changed to show the valid authority term. This option involves four steps:

1. IDENTIFY THE AUTHORITY TYPE - indicate whether the invalid record is a personal name, topical subject, etc.

2. IDENTIFY THE INVALID RECORD - search for the term to be changed and select the appropriate record from the index.

3. IDENTIFY THE VALID RECORD - search for the term to replace the invalid record, and select the record from the index.

4. ESTABLISH CROSS-REFERENCE - the invalid record may be kept as a See reference to the valid record, if desired, or it may be deleted entirely.

4.19.3.3 AM Add/delete cross-references

The CROSS-REFERENCE ADD/DELETE function consists of three options:

1. ADD SEE REFERENCE - identify the valid authority record and enter one or more "invalid" entries to point to it.

2. ADD SEE ALSO REFERENCE - identify a valid authority record, then identify other valid authority(ies) to which it points. See Also From entries are created automatically.

3. DELETE CROSS REFERENCE - identify an authority record and indicate which of its reference "links" is to be deleted. Corresponding See Also From reference in the other record will be deleted automatically; a term which is a See to an authority record will be deleted.

4.19.4 AM Special Features

A special feature of the AUTHORITY MAINTENANCE function is the fact that all associated bibliographic records are automatically updated when an authority record is changed. Users should keep in mind that each edit of an authority record will generate transactions to update each bibliographic record which uses that authority heading. If the heading is a commonly-used one, it may take some time for all bibliographic records to be changed.

5 CATALOG ACCESS SUBSYSTEM

The Catalog Access Subsystem is the ILS online catalog. It allows users to search the Master Bibliographic File using a number of different search types. There are 7 different options in the CATALOG ACCESS SUBSYSTEM (CAS):

1. ES = ENTER SEARCH
2. AU = AUTHOR SEARCH
3. TI = TITLE SEARCH
4. SU = SUBJECT SEARCH
5. OS = OTHER SEARCHES
6. TM = TERM SEARCH
7. GF = GENERAL FUNCTIONS

For more information about any of these options
select the number of the option desired.

5.1 INTRODUCTION TO SEARCHING

To search the ILS online catalog you must first identify the type of search you wish to perform. For instance, if you want items by a given author, choose the AUTHOR search; if you know the title of the desired item, choose TITLE search; if you want all items on a given subject, choose SUBJECT search; to search for items containing a given word or phrase, choose the ENTER A TERM search by typing in the word you are interested in; or to try other kinds of searches, choose OTHER searches.

For more information about any of these searches, choose the appropriate number below or enter a / to resume searching. For more general information about searching, press RETURN.

1. AUTHOR SEARCH
2. TITLE SEARCH
3. SUBJECT SEARCH
4. OTHER SEARCHES
5. ENTER A TERM

SEARCHING COMMANDS - These commands can be used at any time to end a search, back up or start a new search. Follow each command by pressing RETURN.

/ - to end your current search and allow you to start a new search.
\- - to take you back to the previous display.
? - to get brief instructions
F - to move FORWARD through a list when (MORE) is displayed.
B - to move BACKWARD through a list.

/AU - to start an AUTHOR search
/TI - to start a TITLE search
/SU - to start a SUBJECT search
/CS - to select one of the OTHER searches
/TM - to start a TERM search

= - to save a step by combining a command and your search term. For example, you may enter /SU=politics or /AU=Jackson to start a new search.

Now enter a / to resume searching or enter ? for other information.

5.2 AUTHOR SEARCH

To search by author, enter as much of the name as you know in the "fill-in-the-blanks" area provided. ILS will then display a list of authors from the index, starting with the name or partial name which you entered. If the name is not in the index at all, ILS will still display names following it. For example:

LAST NAME FIRST NAME MIDDLE NAME
ANDERSEN

ILS will display author names, beginning with ANDERSEN. Choose the desired author by its REF number to see a list of items in the catalog by that author.

Enter a / to resume searching or /ES for more information on searching or ask a librarian.

5.3 TITLE SEARCH

To search by title, enter as much of the title as you know in the blank area provided. ILS will then display a list of titles from the index, starting with the title or partial title which you entered. If the title you entered is not in the index at all, ILS will still display titles following it. For example:

ENTER TITLE: FIRE

ILS will display titles, beginning with FIRE. To scan through the list of titles, you may enter F to go FORWARD in the list, or B to go BACK. To see a more complete listing for a title, enter its REF number.

IF YOU ARE UNSURE OF THE CORRECT TITLE YOU MAY ENTER ONLY THE FIRST WORD.

IF YOU REMEMBER ONLY ONE WORD OF THE TITLE YOU MAY WISH TO DO A TERM SEARCH.

Enter / to resume searching or /ES for more information or ask a librarian.

5.4 SUBJECT SEARCH

To search by subject, enter a single word in the blank area. YOU DO NOT HAVE TO ENTER A COMPLETE WORD. ILS will then display a list of words from the index, starting with the word or partial word which you entered. If the word you entered is not in the index, ILS will still display words following it. For example:

ENTER A WORD: POLITICS

ILS will display words, starting with POLITICS. If you entered POLI the list would have begun earlier in the alphabet, perhaps with POLICY or POLITICAL, terms you would have missed otherwise. Find the word in the list which interests you and press its REF number. ILS will display all SUBJECT HEADINGS which contain that word. Again, press the REF number for the subject which interests you. ILS may list items in the catalog or further subdivisions for the subject heading with REF numbers.

Enter / to resume searching or RETURN for more information.
EXAMPLE OF SUBJECT SUBDIVISION DISPLAY

REF	TITLES	SUBJECT
R1	12	World politics
R2	5	- 1939-1945
R3	7	- 1945-
R4	3	- Addresses, essays, lectures

In this case you can enter REF number 1 to see all items with the subject heading World Politics regardless of subdivisions or enter 2, 3, or 4 to see items with specific subdivisions.

Enter / to resume searching or /ES for more information on searching or ask a librarian.

5.5 OTHER SEARCHES

If you wish to search by an ORGANIZATION NAME (such as the American Medical Association) or a MEETING NAME (such as the European Computer Congress) or if you are looking for a specific item and you know its exact title, call number or other identifying number, you may wish to choose one of the OTHER SEARCHES.

1. TITLE KEY
2. SERIES AUTHOR
3. OCLC NUMBER
4. ISSN/ISBN
5. CALL NUMBER
6. CORPORATE NAME
7. CONFERENCE NAME

For more information on any search, press its number.

Enter a / to resume searching, /ES for more information about searching or ask a librarian.

5.5.1 TITLE KEY SEARCH

TITLE: The (pol)itics (of) (em)erging (n)ations.
TITLE KEY: polofemn

A title key is a quick way to find an item when you are sure of its title.

A 3.2.2.1 title key is made up of the first 3 characters of the first word, the

first 2 characters of the second, the first 2 characters of the third, and th
first character of the fourth word in the title of a book or magazine. Articl
(a, an, the) as a FIRST word are ignored.
TO SEARCH - type the title key for the desired item. You do not need to enter
complete 3,2,2,1 key or enter the commas. In the example above, you could find
the item with all of these title keys: polofem polofe polo po
but the more letters you enter, the better your chances of finding only the
desired item.

Enter / to resume searching, /ES for more general information, T for
information about other searches. or ask a librarian.

5.5.2 SERIES SEARCH

Often a publisher or other organization will issue a SERIES of books on a
single topic. All books in the series will share a common series name such
as 'Addison-Wesley Series in Physics' or 'Conference Board Report.'

To search, enter as much of the series name as you know in the blank area
provided. ILS will then display a list of titles from the index, all from
series which match your entry. For example:

ENTER SERIES: WEST

ILS will display titles from series beginning with 'WEST', e.g. 'West Legal
Reports' and even 'Western Towns Travel Series.'

IF YOU ARE UNSURE OF THE SERIES NAME YOU MAY ENTER ONLY THE FIRST WORD.
IF YOU REMEMBER ONLY ONE WORD IN THE SERIES YOU MAY WISH TO DO A TERM SEARCH.

Enter / to resume searching or /ES for more information or ask a librarian

5.5.3 OCLC NUMBER SEARCH

Many libraries catalog their materials through a computer system known as
OCLC, Inc. Any catalog information created in OCLC is assigned a unique
number.

To search by OCLC number, type the number and RETURN. If there is no item
in the catalog with that exact number, ILS will display

'NO MATCH OF THIS ENTRY, RETURN TO CONTINUE'

If a match is found, a brief author-title listing will be displayed.

Enter / to resume searching
/ES for more general information
T for information on some of the other searches possible

5.5.4 ISBN/ISSN SEARCH

The ISSN and ISBN are numbers which are assigned to books (ISBN) and magazines (ISSN). The number is a code which identifies both the publisher and the specific item.

To search by ISBN or ISSN number, type the number and RETURN. If there is no item in the catalog with that exact number, ILS will display:

'NO MATCH OF THIS ENTRY, RETURN TO CONTINUE'

If a match is found, a brief author-title listing will be displayed.

Enter / to resume searching
/ES for more general information
T for information on some of the other searches possible

5.5.5 CALL NUMBER SEARCH

The call number of any library material is used both to show location and to arrange items by subject. A call number search can bring together a list of items which have the same subject matter and are shelved near each other.

To search, type the number or a portion of the number and press RETURN. For example:

ENTER CALL NUMBER: Q1

A brief author-title listing will be displayed for any items with a call number beginning with Q1: Q1.A2 Q11.3.B7 Q127.G6

Enter / to resume searching
/ES for more general information
T for information on some of the other searches possible

5.5.6 ORGANIZATION NAME SEARCH

Books are sometimes sponsored by an organization. To search by organization name, enter as much of the name as you know in the blank. ILS will then display a list of organizations from the index, starting with the name or partial name which you entered. If the name you entered is not in the index at all, ILS will still display names following it in the alphabet. For example:

ENTER TITLE: PEACE

ILS will display names beginning with PEACE. To see the items sponsored by an organization, select the REF number next to it. To scan through the list

of names, you may enter F to go FORWARD in the list, or B to go BACK.

IF YOU ARE UNSURE OF THE CORRECT NAME YOU MAY ENTER ONLY THE FIRST WORD.
IF YOU REMEMBER ONLY ONE WORD FROM THE NAME YOU MAY WISH TO DO A TERM SEARCH.

Enter / to resume searching, /ES for more general information, T for information about other searches, or ask a librarian.

5.5.7 MEETING NAME SEARCH

Books are sometimes a report on a meeting. To search by meeting name, enter as much of the name as you know in the blank. ILS will then display a list of meeting names from the index, starting with the name or partial name which you entered. If the name you entered is not in the index at all, ILS will still display names following it in the alphabet. For example:

ENTER TITLE: FREEDOM

ILS will display names, beginning with FREEDOM. To see the items select the REF number next to the meeting in which you are interested.

IF YOU ARE UNSURE OF THE CORRECT NAME YOU MAY ENTER ONLY THE FIRST WORD.

IF YOU REMEMBER ONLY ONE WORD FROM THE NAME YOU MAY WISH TO DO A TERM SEARCH.

Enter / to resume searching, /ES for more general information, T for information about other searches, or ask a librarian.

5.6 TERM SEARCH

The TERM search allows you to look for a word in the indexes, whether it appears in a subject, a title or as an author.
For example:

ENTER TERM: FREUD

ILS will display the index, starting at FREUD or, if FREUD is not listed, starting with the closest match. Choose the desired word by entering the REF number and pressing RETURN. ILS will then list how many times the word has been used as an AUTHOR, or in a TITLE or how many SUBJECTS contain the word. Enter the REF number of the catagory that you are interested in. You may, for example, press the REF number for AUTHOR and see a list of items written by FREUD then enter - to go back in your search and press the REF number for FREUD in SUBJECTS.

Enter / to resume searching or /ES for more information on searching or ask a librarian.

6 CIRCULATION SUBSYSTEM

6.1 CS INTRODUCTION

The Circulation Subsystem is the part of ILS which maintains the location and disposition (information related to the status and patron responsibility) of all items in the collection.

INFORMATION AVAILABLE

(1) Options of the Circulation Subsystem

(2) Overview of the Circulation Subsystem

(3) Special Features of the Circulation Subsystem

(4) Glossary of terms used in the ILS System

Select the number of the option desired:

6.1.1 Circulation Subsystem Options

There are 23 different options in the CIRCULATION SUBSYSTEM (CS). They are:

1. CA	= CART SYSTEM	13. PR	= PATRON REGISTRATION
2. CX	= EXPENDIBLE ITEM	14. PS	= PATRON STATUS
3. CI	= CHECK IN ITEMS	15. PU	= PULL
4. CO	= CHECK ITEMS OUT	16. RC	= RECALL
5. IL	= INTERLIBRARY LOAN	17. RE	= RENEW
6. IS	= ITEM STATUS	18. RI	= RECEIPT CHECK IN
7. ME	= MESSAGES (PATRONS/ITEMS)	19. RV	= RESERVE
8. MO	= MAIL OUT ITEMS	20. SH	= SHELF
9. NR	= NOTIFY RESERVE	21. SS	= SET STATUS
10. PA	= PATRON ACTIVITY	22. VE	= VERIFY
11. PD	= PATRON DELETE	23. GF	= GENERAL FUNCTIONS
12. PP	= PRINT PULL SLIPS		

For more information about any of these options select the number of the option desired or press F to FORWARD to CS OVERVIEW.

6.1.2 Circulation Subsystem Overview

The Circulation Subsystem is composed of 23 circulation-related options and 6 general function options which may be used in other subsystems as well. All of these options are organized within the HELP System in the same general format as follows:

(1) an overview of that option

(2) step by step procedures for that option

(3) a special features section for that option

For more information on any specific option:
Press B to go BACKWARDS to CS OPTIONS, or
F to go FORWARDS to CS SPECIAL FEATURES, or
T to return to the top of this discussion.

6.1.3 Circulation Subsystem Special Features

ILS has several special features which the user needs to know to use the system effectively. Special Features used in the Circulation Subsystem have been divided into two separate discussions. They are:

(1) General Concepts

(2) Special Function Keys

Users should be aware of these general concepts and special function keys since they are used throughout ILS.

Enter the number of the discussion you wish to read more about, or
Press F to FORWARD to the Glossary, or
B to BACKUP to CS Overview, or
T to TRAVEL to the Circulation Subsystem top paragraph.

Several GENERAL CONCEPTS are useful throughout the subsystems of the ILS. These include general commands such as:

D(isplay) -- for displaying the full record of an entry
F(orward) -- for moving forward through Item and Patron Lists
B(ackup) -- for moving backwards through Item and Patron Lists

Some keys have special meanings, such as:

: -- for combining two instructions into one step
/ -- for exiting out of a subsystem and into another or
going to another activity within a subsystem

The function keys are useful for accessing HELP, for abbreviated F(orward) and B(ackup) commands, and other things.

See relevant parts of the chapter GENERAL FUNCTIONS for more information.

6.2 CART SYSTEM

CART SYSTEM enables users to define carts, book trucks, and other places within the library, as alternate locations for items. This feature also permits the user to maintain and update the current status of these alternate locations so that the location of the items stored on them is kept accurate.

AVAILABLE INFORMATION

1. Overview of Cart System
2. Step by Step Procedures for Cart System
3. Special Features of Cart System

Please enter the number of the type of information you desire:

6.2.1 CA Overview

CART SYSTEM permits library staff to identify book trucks and carts as temporary storage locations for items which have been checked in and are awaiting shelving. In CART SYSTEM, users may name carts, define their location, change their location, and erase and add items which are queued upon them awaiting shelving. Through the use of this feature, users may know the physical location of any available item in the library that is not on the shelf. During periods of high volume circulation, this feature can be of great value to both users and staff.

6.2.2 CA Step By Step

To initiate any of the CART SYSTEM functions the user must enter /CA in response to the ILS prompt COMMAND. ILS will respond with:

```
CART SYSTEM                    To display all the available options,
OPTION:                        enter a ? and a return.
```

CART OPTIONS:

```
1) P  PRESENT CART BEING LOADED      5) L  LIST ALL DEFINED CARTS
2) A  ADD NEW CART                   6) R  RESET CART...ERASE ITEMS IN CART
3) D  DELETE EMPTY CART              7) S  SHELVING CART
4) E  EDIT EXISTING CART             8) T  TEMPORARY
```

For further information, select the number for the desired discussion.

6.2.2.1 CA Present Cart Being Loaded

To check in items in CART SYSTEM, type P in response to the Cart prompt OPTION.

ILS will next prompt for CART NAME: Enter either the name of the cart to be used with CHECK IN or a ? and a return.
If ? is entered, all defined carts will be listed and ILS will ask WHICH ONE: Users may then identify them by the cart's id#. ILS will display the selected cart's name, number and location as shown below.

If the user instead enters the cart name directly, (e.g. Sandy) ILS will reply:

OPTION: PRESENT CART
CART : CART0005 NAME: SANDY
ARE YOU SURE? NO/ (Y)

NOTE: Y causes ILS to display: REPLACE: (current loc.) WITH: (new loc.)
N returns you to option.
CART 005 IS CURRENT CART. HIT RETURN TO CONTINUE> * or hit return to continue

6.2.2.2 CA Add New Cart

ADD NEW CART may be initiated at any time circumstances require. Users may add and delete carts as workloads shift or as new exhibits are compiled or dissolved.

To add a new cart, enter A in response to the Cart prompt OPTION:
ILS will respond NAME: If a duplicate name is entered ILS will reply:
THIS NAME IS ALREADY DEFINED. USE OTHER NAME

If a new name is entered, ILS will next prompt for LOCATION:
The user may enter free text to describe where the new cart willbe stationed.
For example:

CART SYSTEM
NAME: Michael
LOCATION: North Side 3rd Floor

Hit return to return to OPTION:

6.2.2.3 CA Delete Empty Cart

DELETE NEW CART may be initiated at any time circumstances require. Users may add or delete carts as workloads shift or as new exhibits are compiled or dissolved.

To delete an empty cart, enter D in response to the Cart prompt OPTION:
ILS will next ask for NAME: Enter the name of the cart to be deleted.

ILS will verify ARE YOU SURE? NO/ N will return you to OPTION:
Y will cause the system to reply:

[illegible] IS DELETED HIT RETURN TO CONTINUE>

[illegible] empty carts may be deleted. An attempt to delete an unemptied cart [illegible] display the message: CART HAS BOUND. PLEASE CLEAR CART FIRST.

6.2.2.4 CA Edit Existing Cart

EDIT EXISTING CART is used to edit the name or location of a defined cart.

To edit a defined cart, enter E in response to the Cart prompt OPTION:
ILS will reply by asking for NAME: Enter the name of the cart to be edited.

ILS will reply: REPLACE: (current name) NOTE: If only the location is to be
WITH: (insert new name) edited, hit return to continue.
ILS will next reply: NAME:(new name if updated)
LOCATION: REPLACE: (old location)
WITH: (insert new location)

Press return after inserting the new location. ILS will display the inserted text in the REPLACE field and will prompt for a new replacement. If the text has been entered in error, retyping the correct text will update the location. If the text is correct press return. ILS will display the message:

CART 0005 IS EDITED. HIT RETURN TO CONTINUE>

6.2.2.5 CA List All Defined Carts

LIST ALL DEFINED CARTS displays all carts defined in the Cart System.
To view the list, enter L in response to the Cart prompt OPTION. ILS will display, e.g., the following:

#	CID	NAME	LOCATION	COUNT
1	CART0001	SANDY	CIRCULATION	4
2	CART0002	MICHAEL	NORTH SIDE 3RD FLOOR	7

Count refers to the number of items which are currently queued on the cart.

If there are more defined carts than can fit on one screen ILS will respond: ENTER 'F'ORWARD OR 'B'ACKWARD OR '~' TO OPTION : The user may browse the list until the desired cart is found.

6.2.2.6 CA Reset Cart

RESET CART is used to set the cart count back to 0 items. This is typically done after all the items on the cart have been shelved.

To reset a cart, enter R in response to the Cart prompt OPTION:
ILS will ask for NAME: Enter the name of the cart to be reset.
ILS will respond:

CARTOOOS NAME: SANDY

ARE YOU SURE NO/ (y) NOTE: N will return user to prompt OPTION:

CART0005 IS CLEARED. HIT RETURN TO CONTINUE>

6.2.2.7 CA Shelving Cart

SHELVING CART is used to update the status of items queued on a cart, from that of being queued on a given cart to that of being in the process of being shelved.

To update an item's status to being shelved, enter S in response to the Cart System prompt OPTION:

ILS will then ask for CART: Users may enter the cart name, or press ? and return to have all defined carts displayed. If ? is chosen, ILS will then prompt WHICH ONE?

After the desired cart has been identified, ILS will display the following:

CART SYSTEM	NO (default) will return the user to OPTION:
CART: CART0005 NAME: SANDY	YES (Y) will cause ILS to update the status of all items on the cart. ILS will then reply:
ARE YOU SURE? NO/	CART0005 IS SHELVED. HIT RETURN TO CONTINUE>

6.2.2.8 CA Temporary

TEMPORARY is used to assign individual items to a temporary location. This may be done, for example, when setting up a cart of new books, or compiling items which require some special attention or technical processing such as cataloging, or repair.

To assign an item to a temporary cart, enter T in response to the Cart System prompt OPTION:

ILS next prompts for ITEM. Users may identify the item by any ILS item access point.

NOTE: for a more detailed discussion on how to identify items, enter G and return. To return to this discussion, enter G again and a return.

After ILS has identified the specific item, the user must enter an up arrow, (i.e., - key) to complete the transaction. DO NOT use / to return to the OPTION

as this will erase the updated status of the last item identified. This also happens when performing CHECK OUT.

6.2.2.9 Identify Item

Items may be identified in various ways, including:

* using a barcode reader
* by item identification number
* by author
* by Library of Congress number
* by title key
* by author/title key

* by call number
* by ISSN/ISBN
* by series

For a detailed description of procedures and options for identifying an item, see the section "Identify Item" in the chapter GENERAL INFORMATION.

6.2.3 CA Special Features

DEFINED CARTS
The Cart System uses bar coded carts (book trucks) to queue items which have been checked in and which are awaiting being shelved. Each cart must be defined or "registered" in the Cart System so that ILS will be able to identify which cart is being used. To define a cart refer to option A ADD NEW CART in step by step procedures.

It should be noted, however, that the location of an item in CART SYSTEM can be any physical location within the library, e.g., the bindery, new book shelf, or exhibit case.

ENTER BY NAME
When checking in items via CART SYSTEM, remember to enter the name of the cart instead of its number when the system prompts for NAME: If you forget which name goes with which cart, enter either a ? and a return or select option L. ILS will display a list of all defined carts.

ITEM STATUS DISPLAY
After an item has been checked in via the Cart System, the item status display of that item will be updated to read: STATUS...AVAILABLE AT CART: (name)
LOCATION: (place)

After all the items on a cart have been shelved, and after the cart has been reset, the item status display is updated to read: STATUS...AVAILABLE.

6.3 EXPENDIBLE ITEM

EXPENDIBLE ITEM is used to keep records of journal article photocopy requests and other materials which are compiled for patrons, but which patrons need not return to the library.

AVAILABLE INFORMATION

1. Overview of Expendible Item
2. Step by Step of Expendible Item
3. Special Features of Expendible Item

For further information, select the number for the appropriate discussion.

6.3.1 CX Overview

EXPENDIBLE ITEM is designed to keep records for those items which are in a sense "checked out" to patrons but for whom there is no associated due date. Examples of such expendible items might include journal articles which have been photocopied for a patron, or bibliographies which may have been compiled as a result of an on-line literature search.

6.3.2 CX Step By Step

To make a record of an expendible item being prepared, enter CX in response to the ILS prompt COMMAND.

ILS will then prompt for PATRON: The user may identify the patron via any one of the patron id options. For more discussion of the patron id options, enter G and return. To return to this discussion press G again and a return.

Next ILS will prompt the user to enter a free text message of up to 3 lines. It may be edited by using the back space key or by moving the cursor. Hit a return repeatedly until the cursor passes through the prompt for the third line. ILS will return to the prompt PATRON ready for the next entry.

NOTE: A separate record must be constructed for each item, even if two or more expendible items are being sent to the same patron. This is done to keep track of statistics.

Any and all ILS functions involving patron data require that the patron be accurately identified in the ILS. See the section "Identifying the Patron" in the GENERAL INFORMATION chapter for a detailed discussion of options for patron identification.

6.3.3 CM Special Features

At this time there are no known special features for EXPENDIBLE ITEM.

6.4 CHECK IN

The CHECK IN procedure permits authorized users to absolve patrons of any further responsibility for items. It breaks the established link between the patron and the item, so that the patron is no longer responsible for the item.

AVAILABLE INFORMATION

1. Overview of Check In
2. Step by Step Procedures for Check In
3. Special Features of Check In

Please enter the number of the type of information you desire:

6.4.1 CI Overview

CHECK IN is the process by which a patron is absolved from the responsibility of having checked out a given item. Items may be checked in immediately upon being returned, or they may be checked in at some later time when the circulation desk is not busy. After an item has been checked in, the patron is no longer responsible for the item.

6.4.2 CI Step By Step

CHECK IN requires that the user do 2 things:

IDENTIFY THE CART BEING LOADED
(optional-select 'F' to see Special Features)

1. IDENTIFY THE ITEM(S) TO BE CHECKED IN
   Search ILS for this item's record or
   if the item is bar coded
   Wand the bar code label on the item.

2. EXIT FROM CHECK IN
   Terminate CHECK IN by entering a /.

For further information, enter the number for the appropriate discussion or press F to Forward to Special Features.

6.4.2.1 Identify Item

Items may be identified in various ways, including:

* using a barcode reader
* by item identification number
* by Library of Congress number
* by title key

* by author
* by call number
* by ISSN/ISBN
* by author/title key
* by series

For a detailed description of procedures and options for identifying an item, see the section "Identify Item" in the chapter GENERAL INFORMATION.

6.4.2.2 CI Complete Transaction

Exiting from CHECK IN is unlike exiting from any other Circulation Subsystem activity. Although the / key is used to exit out of CHECK IN, it does not do entirely the same thing that it does when it is used to exit from any other circulation activity. In any other circulation activity the / key will erase whatever transaction had just been entered just prior to entering the / and going up to the Circulation Subsystem level. In CHECK IN, however, while the / will still get you up to the Circulation Subsystem level, it will not erase the transaction which just absolved the patron from responsibility over the item just checked in. In other words, the erasure between patron and item still stands as the user is moved up to the Circulation Subsystem level.

6.4.3 CI Special Features

The CHECK IN procedure has the following special features associated with it:

1. BEEPING TONE - If the user hears a beeping tone while checking in an item, it means that there is a message about that item appearing on the CRT screen. The message will tell the user what to do with the item. Typical messages could tell the user that the book is needed in binding, or that it is a temporary item and must be sent to cataloging for processing.

2. TEMPORARY LABELS or NOT - As items are checked in, it is important that the user look closely at the barcode label. If it is a temporary label the item must go directly to the cataloging department to be processed. If the item has NO BARCODE LABEL on it, the user must search for it using any one of the 8 item id options (see Identify Item under CI Step by Step Procedures).

3. CART SYSTEM EXPLAINED - The CART SYSTEM is used in conjunction with CHECK IN to identify an alternate location for an item after it has been checked in. Through the CART SYSTEM, an item, which has been checked in and placed on a cart awaiting shelving, can have its location on that cart, and the physical location of the cart itself, monitored by ILS in the item's Item Status Display. Thus, a user looking for an "available" item, not finding it on the shelf, can know exactly where the item is elsewhere within the library.

4. CHECK IN VIA CART - To CHECK IN via CART SYSTEM, the user must wand the cart, upon which items to be checked in are to be

SYSTEM

placed, or identify it by typing in the name of the cart, in response to the ILS prompt CART. ILS will ask the user if the location of the cart is still going to be the same as it had been previously. If the location is going to change, in response to the prompt REPLACE, the user must enter the old location; in response to the prompt WITH, the user must enter the new location. If the location is not going to change the user should press return twice.

Having identified the cart upon which items are to be placed, the regular check in procedure, as detailed in CI Step by Step, may be followed.

6.5 CHECK OUT

The CHECK OUT procedure permits authorized users to assign responsibility for items to patrons. It establishes a link between the patron and the item, making the patron responsible for the item until it is returned to the library.

AVAILABLE INFORMATION

1. Overview of Check Out
2. Step by Step Procedures for Check Out
3. Special Features for Check Out

Please enter the number of the type of information you desire:

6.5.1 CO Overview

CHECK OUT is the procedure used by the library to maintain control of its collection. This procedure permits patrons to use the items owned by the library while providing the library with information about which patrons hold specific items and when items are due to be returned to the library. CHECK OUT requires the following two pieces of information:

1. A Patron Identifier - A patron's full name registered in ILS or the bar code number for the patron, which is equal to the number ILS uses internally to identify the patron.

2. An Item Identifier - Any one of eight pieces of information about an item (e.g., title, author, call#) or the bar code number for the individual item (a unique number for each piece) which ILS uses internally to identify the item.

6.5.2 CO Step By Step Procedures

Check out should follow these steps:

1. IDENTIFY THE PATRON
   Search ILS for this patron's record or
   do patron registration

2. IDENTIFY THE ITEM(S) TO BE CHECKED OUT
   Search ILS for this item's record or
   place temporary bar code on the item

3. COMPLETE THE TRANSACTION
Record in ILS that this patron has checked out this item

For more HELP concerning any of these steps enter the number of that step and press RETURN.

6.5.2.1 Identify Patron

Any and all ILS functions involving patron data require that the patron be accurately identified in the ILS. See the section "Identifying the Patron" in the GENERAL INFORMATION chapter for a detailed discussion of options for patron identification.

6.5.2.2 Identify Item

Items may be identified in various ways, including:

* using a barcode reader
* by item identification number
* by author
* by call number
* by ISSN/ISBN
* by Library of Congres number
* by title key
* by author/title key
* by series

For a detailed description of procedures and options for identifying an item, see the section "Identify Item" in the chapter GENERAL INFORMATION.

6.5.2.3 Complete Transaction

After the correct patron and the correct item(s) have been identified to the ILS, the user must now COMPLETE THE TRANSACTION. It is not sufficient to stop here, because up to this point the data have not been permanently filed. The user must complete the transaction by pressing the - and a return or by pressing the f2 key to have ILS permanently file the transaction.

To complete a Circulation Subsystem transaction, the user must press either special function key f2 or the up arrow or - key. This will cause the data stored in the terminal to be transmitted to the main computer and recorded in the Master Bibliographic File. In the event that a user does not want to complete the transaction (e.g. if a user demonstration is being given, or if a patron decides at the last minute not to check out this item after all) press ABORT or the function key f8 or / and return and the transaction will be erased completely. It will be the same as if the data had never been entered in the first place. This also means, however, that if the user fails to press - or function key f2 IMMEDIATELY after entering the last item, the good data could be erased too!

6.5.3 CO Special Features

There are some special features in CHECK OUT that users should be aware

of which may be of help when performing CHECK OUT. They are:

1. Due Date Override - Users may override the due date for an item after it has just been checked out by entering two characters, DD for Due Date. ILS will then ask for a new due date. Users may then enter an actual new due date or a symbolic new due date. An actual new due date means entering the actual date an item is due (4/30/80). A symbolic due date means advancing the due date a certain number of days from today and is entered as T+some number. If the item was originally due 4/15, by typing T+15 it will now be due on 4/30. NOTE* If the item just checked in is a serial temporary item, type 'S' instead of T+7. 'S' is equal to one loan period of 7 days.

2. The Patron at the "Bottom" of the Patron List - When searching the ILS Patron List for the correct patron, users must NOT assume that the last patron on the screen (the 5th one displayed) is the only patron with that name. If the last name on the screen seems to be the correct entry, users should still go FORWARD one screen to find out if there are any more entries with the same name. The chances of this happening are especially high for common surnames.

3. Special Use of the / Key to Quit and Erase the transaction - The / key used in CHECK OUT does something MORE than it does generally in ILS (see CS Special Features for a general discussion of the / key). Here, if you want to quit checking out an item because, e.g., you made an error or want to go to some other function and if you DO NOT want ILS to make any record of this event (you must not have pressed the COMPLETE TRANSACTION key yet), you may then enter / or / and some other function code (e.g., /CI or /HE) and ILS will take you there. Note that if you enter only the /, ILS will take you wherever you were before you came to CHECK OUT. REMEMBER: the / will not record any items that were in the process of being checked out to the last identified patron.

6.6 INTER-LIBRARY LOAN

The INTERLIBRARY LOAN procedure is used when borrowing items from or lending items to other institutions. When used in conjunction with CHECK OUT and CHECK IN, it permits the library to maintain records and summaries of all Interlibrary Loan activity.

AVAILABLE INFORMATION

1. Overview of IL

2. Special Features for IL

Please enter the number of the type of information you desire:

6.6.1 IL Overview

The ILL function allows library staff to prepare an ALA-format form for use when lending or borrowing material through interlibrary loan. Users may add, edit, or delete forms for loaned or borrowed materials, and may update the record when the material is returned.

When using the IL routine, users must remember to first create a temporary record for the item to be borrowed from another library. IL only serves to record the fact that an interlibrary loan transaction has taken place, it DOES NOT do anything to directly affect the CHECK IN or the CHECK OUT of the item.

6.7 ITEM STATUS

ITEM STATUS permits authorized users to view the status of any copy of any item in the Master Bibliographic File (MBF).

AVAILABLE INFORMATION

1. Overview of Item Status
2. Step by Step Procedures for Item Status
3. Special Features for Item Status

Please enter the number of the type of information you desire:

6.7.1 IS Overview

The ITEM STATUS function permits authorized users to view the status of any copy of any title in the Master Bibliographic File. It includes the following information.

1. Title of the item
2. Author of the item
3. Call number
4. ISBN/ISSN number
5. Number of times the item has been checked out and used in-house
6. Current status of the item (e.g., available for circulation, checked out, missing, etc.)
7. Status of other copies of the item, if desired.

6.7.2 IS Step By Step

ITEM STATUS requires the user to:

1. IDENTIFY THE ITEM
   Search ILS for the desired item
2. PRINT STATUS OF ITEM
   Find the correct copy of the item
   and print its status.

For more HELP concerning either of these steps enter the number of that step and press RETURN.

6.7.2.1 Identify Item

Items may be identified in various ways, including:

* using a barcode reader
* by item identification number
* by author
* by call number
* by ISSN/ISBN
* by Library of Congres number
* by title key
* by author/title key
* by series

For a detailed description of procedures and options for identifying an item, see the section "Identify Item" in the chapter GENERAL INFORMATION.

6.7.2.2 IS Print Status

Printing out an item's status may involve several steps, depending upon the circumstances of the particular item. In cases where there are multiple copies or volumes/issues/parts/supplements ILS will prompt the user for the exact data needed to identify the desired item.

EXAMPLE: A user wishes to display the status of a serial, "North American". After having identified this title, ILS will prompt for:

VOLUME: The user may enter 1. If there exists more than one copy ILS will prompt for:

COPY#: If the user is unsure which copy is the right one, pressing ? and a return (or the f1 key) will cause the the status of all copies to be displayed as follows:

```
INDEX  COPY  STATUS
  1      1     CO DUE 06/13/80
  2      2     AVAILABLE
  3      3     AVAILABLE
  4      5     AVAILABLE
```

If the user desires to learn more information about any particular copy, entering the appropriate index number will cause ILS to display a more detailed record of the item's status:

```
  ID: 0    $  $$      CALL#: TL686.N6S9            ISBN#: 0668033185
  TITLE: NORTH AMERICAN
  AUTHOR: SWANBOROUGH, FREDERICK GORDON
  CHECKED OUT IN THIS PERIOD: 1                 INTERNAL USAGE: 0
  STATUS.....  AVAILABLE
  STATUS OF OTHER COPIES? YES/
```

NOTE: In this display the copy # is not included. ILS assumes the user knows

the copy number since it was just displayed in conjunction with the index #. To get back to the prompt ITEM: enter a return in response to the ILS prompt HIT RETURN TO CONTINUE>.

6.7.3 IS Special Features

As of June '6, '980 there are no known special features for ITEM STATUS.

6.8 MESSAGE

The MESSAGE procedure allows the library staff to attach a free text message to the patron record or the item record.

AVAILABLE INFORMATION

1. Overview of Message
2. Step by Step Procedures for Message
3. Special Features for Message

Please enter the number of the type of information you desire:

6.8.1 ME Overview

MESSAGE

MESSAGE allows the library staff to attach a free-text message to the patron record or the item record. For example, a message attached to the item record might note torn or missing pages. A patron message could notify the patron that, e.g., the reference department had found information which he or she had requested earlier. Messages are automatically displayed whenever the record to which they are are attached is called up. These messages may be saved or deleted after being displayed.

6.8.2 ME Step By Step

MESSAGE allows the authorized user to leave a message associated with either a:

1. patron record or
2. item record

If the user wants to leave a message in a patron record, the necessary response to the question (P OR I) is P. To assign the message to a specific patron, the user has four options for identifying the patron. Type in either:

a. the patron's identification number in the system
b. the patron's name (surname first) or a truncation of surname
c. DP, then the identification code of a library department
d. PR, then a full, new patron registration (for unregistered ones).

Note that the patron's bar code can also be wanded for identification.

DETAILED PROCEDURES for Patron Message

a. Enter either the patron's id number or his surname or a truncated version of it. The id number is the numeric version [illegible] the system is able to locate the patron's record, you will be asked to retype the id number based on the found record found from name. You may also retype a truncated version of the [illegible] The screen will then display 1> at the left margin [illegible] the first line of the message. Two more lines may be added [illegible] and 3>). Note that any messages already assigned to [illegible] displayed before the 1> appears.
b. Provide patron's surname, first name, etc. or a truncation. If his record is found, the 1> will appear at the left margin. You may type the first line of the message and continue to line 2 (at 2> and line 3 (at 3>).
c. Not currently operational.
d. See HELP instructions for Patron Registration. Go to the General Functions module (selection #16 under Circulation module) and select #'3 (Patron Registration).

If you wish to associate a message with an item in the library's collection, respond to the (P OR I) question with I. To assign a message to an item, there are nine options. Type in either:

a. The item's id number
b. AU (to identify by author's name)
c. CA (to locate by call number)
d. IS (to find the item by ISBN or ISSN)
e. LC (to identify by Library of Congress number)
f. TK (to identify by author key)
g. AT (to find by author/title key)
h. SE (to find by series)
i. MI (to leave a message for the previously entered item).

Note that if the item is in hand, its label can be wanded for identification.

DETAILED PROCEDURES for Item Message

a. Provide the item's id number. If the item's record is found, the 1> will appear at the left margin. You may type the first line of the message and continue to line 2 (at 2>) and line 3 (at 3>). Note that any messages already assigned to the item appear above the 1>.
b. Key in the author's name, surname first, or a truncation of it. Then provide the index number indicated when the retrieved name is displayed. If the number is accepted, the 1> will appear at the left margin as before. Proceed to key in your message.
c. Type in the call number or a truncation of the item for which you wish to leave a message. Provide the index number as in . above. When the 1> appears, type in your message.
d. Key in the number of the item or a truncation of it. If multiple options are offered, select the correct one and enter its index number. When the the 1> appears, key in your message.
e. Provide the LC catalog number of the item. When the 1> appears, type the message.
f. Type the appropriate characters of the title key (the first 3 characters of the first word, first 2 of the next, first 2 of the third, and first of the fourth, each separated by commas). When the item is found, type its index number. Key in the message when [illegible] appears at left margin.
g. Provide the appropriate letters for the author/title key (first 4 characters of each, separated by commas). Next key in the index number. Provide the message when 1> appears.

h. Type the series heading or a truncation of it. If a truncation, select the appropriate index number when it appears. When the '>' appears type in the message.
i. ILS will display the item you had last entered in the Circulation Subsystem. A message may be added when the '>' appears at the left margin.

6.8.3 ME Special Features

1. Message is a generalized form of Pull. Thus when a patron or item record is retrieved, other messages may already be assigned to it.

2. When displaying information retrieved from a search of the files based on a truncated term, ILS will display five (5) retrieved entities at a time. There may be more than five that were retrieved. To view all entities retrieved, continue to press F to advance in the list. When the list is exhausted, there will no longer be a prompt at the bottom of the screen saying THERE'S MORE. To go backward in the list, push B.

6.9 MAIL OUT

The MAIL OUT procedure is used to produce a mailing label for items sent out of the library.

AVAILABLE INFORMATION

1. Overview of Mail Out
2. Step by Step Procedures for Mail Out
3. Special Features for Mail Out

Please enter the number of the type of information you desire:

6.9.1 MO Overview

Mail Out generates a mailing label to send an item in the library collection to a patron. Both the patron and the item must be identified by the system to generate the correct label. The patron may be identified by id number, by name, as a library department, or by defining a new patron through patron registration. The item may be identified by one of eight identifiers or as the previously entered item which the system will identify for you.

6.9.2 MO Step By Step

To generate a mailing label in MAILOUT, enter /MO in response to the ILS prompt COMMAND: ILS will respond by prompting PATRON: The user may identify the patron by any of a variety of means. For a detailed discussion how to identify the patron enter G and a return. To return to this discussion, enter G again and return.

ILS will then display the mailing label as it is going to be printed:

PRINT MAIL LABEL FOR THIS ADDRESS:

LINE 1 SELANDER, SANDY E.
LINE 2 2P242
LINE 3 THE MITRE CORP.
LINE 4 1820 DOLLY MADISON BLVD.
LINE 5 MCLEAN, VA. 22102

ABOVE ADDRESS OK? Y/ NOTE: The default is set to Y. To edit label enter N. To modify or delete lines in the label, enter N. ILS will reply:

(E)DIT/(D)ELETE, (ADD), (I)NSERT LINES OR (C)HANGE WHOLE ADDRESS E/

Default is EDIT. Enter the letter for the function you wish to perform.

```
USER TYPES      ILS PROMPTS

(E)DIT    -     ENTER # OF LINE TO BE EDITED/DELETED
  (some #)      LINE (#) IS: (old way)  CHANGE IT TO:
  (new way)                                        /

(A)DD     -     ADD LINE (next line #)

(I)NSERT  -     INSERT NEW LINE BEFORE WHICH LINE
  (line A)      ENTER LINE TO BE INSERTED BETWEEN LINES (A and B)
  insertion                                          >

(C)HANGE  -     CHANGE WHOLE ADDRESS? Y/
  return        LINE 1: (enter text and continue by pressing return
                         until the whole address has been redone.)
```

Any and all ILS functions involving patron data require that the patron be accurately identified in the ILS. See the section "Identifying the Patron" in the GENERAL INFORMATION chapter for a detailed discussion of options for patron identification.

6.9.3 MO Special Features

As of June 23, 1980, there are no special features for the MAILOUT function.

6.10 NOTIFY RESERVE

NOTIFY RESERVE calls up patron reserve requests and displays information about the patron and the item upon which the reserve was placed.

AVAILABLE INFORMATION

1. Overview of Notify Reserve
2. Step by Step Procedures of Notify Reserve
3. Special Features of Notify Reserve

For further information select the number for the appropriate discussion.

6.10.1 NR Overview

NOTIFY RESERVE is used to keep track of the reserve requests made by each patron. Users may see a list of all patrons who have reserve requests in the system and the title of the item they have reserved. Users may selectively display the full reserve record for any patron by entering the number for that record as it appears on the list.

After a patron has been notified that the item has been returned, the user may delete the reserve request. ILS will update the status of the item to AVAILABLE.

6.10.2 NR Step By Step

To view a reserve request record in NOTIFY RESERVE, enter NR in response to the ILS prompt COMMAND. ILS will respond by asking:

NOTIFY RESERVE
DISPLAY ALL? NO/(y) — ILS is asking if the user wants to have a list displayed of all patrons who have reserve requests in the system.

NO (default) will display a full record for each reserve request. Users may step through the records by pressing return consecutively.
YES will cause a list of patron requests to be displayed, from which the user may select the appropriate record.

The list of patron reserves would appear as follows:

#	PATRON	TITLE	AUTHOR	REQUESTED DATE
1	MULLANE, RUTH	Challenge		Nov 6, 1980

NOTE: Requested date=date request made, not date by which request must be met.
DISPLAY ALL? NO/ (y) Here ILS will display a full reserve request record:

MRS. RUTH MULLANE EXPIRATION DATE: 03/30/80
ORGANIZATION: ARMY PENTAGON LIBRARY OFFICE SYMBOL: ALPENT ROOM #: 2P340
PHONE: (703) 697-1636 MAIL STOP: A5141

```
ADDRESS:
  BUILDING: THE PENTAGON
  STREET:   HIGHWAY 395 AND G.W. PARKWAY
  CITY:     ROSSLYN
  STATE:    VIRGINIA
  ZIP:      22102

TITLE: Challenge
AUTHOR:
DATE OF REQUEST: NOV 6, 1980
ROUTING INSTRUCTION: ROUTE COPY 1 TO MULLANE ASAP...
```

After displaying the full record, ILS will prompt:

```
HAVE YOU NOTIFIED THIS PATRON? NO/
```

NO (default) will cause this record to remain in the system.
YES will delete this reserve request record.

ILS will next pompt:

```
HIT RETURN TO CONTINUE>
```

If another record follows this one in the queue, that next record will be displayed. If the record just displayed was the last one in the queue, ILS will then prompt:

```
NO MORE BOOKS ARE AVAILABLE...TO CONTINUE HIT RETURN
```

3.10.3 NR Special Features

USE OF THE / KEY TO QUIT
In NOTIFY RESERVE, to quit at any point in the activity enter / and a return. Do not enter an up arrow - as ILS will not recognize this character within this activity.

RELATIONSHIP BETWEEN RESERVE AND NOTIFY RESERVE
NOTIFY RESERVE and RESERVE interact closely with each other in ILS. A reserve request record is created using the Add a Reserve option in RESERVE. NOTIFY RESERVE permits users to view the record before the item is returned, and it provides the necessary information by which the staff may inform the patron that the item has been returned and is available.

After the item has been checked out to the patron, or if after some time the patron does not come in for the item and it is returned to the shelves, NOTIFY RESERVE will permit the staff to delete the record of the reserve request from the system.

6.11 PATRON ACTIVITY

PATRON ACTIVITY permits authorized users to view information about a patron's library activity. Information available includes items currently checked out, items on reserve, messages associated with the patron, and total number of items borrowed by the patron during the current reporting period.

AVAILABLE INFORMATION

1. Overview of Patron Activity
2. Step by Step Procedures for Patron Activity
3. Special Features for Patron Activity

Please enter the number of the type of information you desire:

6.11.1 PA Overview

PATRON ACTIVITY permits authorized users to view information about a patron's library activity, including

- titles currently checked out and due dates
- titles of any reserves being held for the patron
- titles on routing lists for the patron
- any messages attached to the patron record
- total items checked out by patron during current reporting period

PATRON ACTIVITY does not display address, telephone number, etc. To display these fields, use the PATRON STATUS function.

6.11.2 PA Step By Step

To view the patron record the user must identify a specific patron in ILS. ILS will then display information from the patron record in the format below.

```
ITEMS CURRENTLY CHECKED OUT
ID      TITLE                    AUTHOR        DUE DATE          RENEW


ITEMS ON RESERVE
ID      TITLE                    AUTHOR      REQUESTED ON    NO NEED AFTER


TOTAL ITEMS CHECKED OUT:
MESSAGE(S)
```

RETURN TO CONTINUE: (ILS will again prompt for PATRON:)

For HELP with patron identification enter '1' and a RETURN.

Any and all ILS functions involving patron data require that the patron be accurately identified in the ILS. See the section "Identifying the Patron" in the GENERAL INFORMATION chapter for a detailed discussion of options for patron identification.

6.11.3 PA Special Features

As of June 27, 1980 there are no special features for the PATRON ACTIVITY.

6.12 PATRON DELETE

The PATRON DELETE procedure permits authorized users to remove patrons from the patron list.

AVAILABLE INFORMATION

1. Overview of Patron Delete
2. Step by Step Procedures For Patron Delete
3. Special Features for Patron Delete

Please enter the number of the type of information you desire:

6.12.1 PD Overview

The PATRON DELETE function allows authorized users to delete patrons from the patron file.

6.12.2 PD Step By Step

PATRON DELETE consists of the following steps:

1. IDENTIFY THE PATRON
   Search ILS for this patron's record.
2. DELETE THE PATRON
   Remove this patron from the patron list.

For more HELP concerning either of these steps enter the number of that step and press RETURN.

For information on SPECIAL FEATURES of PATRON DELETE press 'F' and RETURN.

6.12.2.1 Identify Patron

Any and all ILS function involving patron data require that the patron be accurately identified in the ILS. See the section "Identifying the Patron" in the GENERAL INFORMATION chapter for a detailed discussion of options for patron identification.

6.12.2.2 PD Delete Patron

When the patron has been identified, ILS will display the patron's name. Then,

ILS will prompt:	User enters:
OK TO DELETE? NO/	RETURN to cancel this transaction
	OR
	'Y' to remove all record of the patron from the ILS system.
PATRON IS DELETED TO CONTINUE, HIT <RETURN>	RETURN
PATRON:	The user may now repeat the process and delete another patron or enter '/' to return to the CIRCULATION SUBSYSTEM.

6.12.3 PD Special Features

There are two Special Features of PATRON DELETE.

1. If the user attempts to delete a patron who has items checked out, ILS will display the following message:

```
--------------------------------------------------------------------------------

*** NOT DELETED ***

PATRON HAS THE FOLLOWING ITEM(S):
PLEASE CHECK IN THESE ITEM(S) BEFORE DELETING PATRON

ID          TITLE                          AUTHOR                      DUE DATE

--------------------------------------------------------------------------------
```

The items checked out to that patron will then be listed.

2. When the user deletes a patron, that patron's name is removed from the entire ILS system. The patron will automatically be removed from reserve and routing lists.

6.13 PRINT PULL SLIPS

PRINT PULL SLIPS is used to generate a print-out of items to be taken from the shelves.

AVAILABLE INFORMATION

1. Overview of Print Pull Slips
2. Step by Step of Print Pull Slips
3. Special Features of Print Pull Slips

For more information, select the number for the appropriate discussion.

6.13.1 PP Overview

PRINT PULL SLIPS is used to initiate ILS to begin printing out, on either a slave printer or a line printer, notices of items which are to be removed from the shelves. Items may be pulled for such reasons as binding, photo-copying or to fulfill an interlibrary loan request.

6.13.2 PP Step By Step

To begin generating pull slips, enter PP in response to the ILS prompt COMMAND. ILS will display the following message:

(P)RINT PULL SLIPS OR (D)ELETE LIST OF PULL SLIPS ALREADY PRINTED

Enter either P or D as appropriate. To quit at this point, enter / and return. Each of the two possible scenarios is discussed below.

TO PRINT PULL SLIPS:
ILS will ask: PRINT PULL SLIPS ON (S)LAVE PRINTER OR (L)INE PRINTER S/
The default is set to the slave printer. In either case, ILS will next ask the user to define exactly what is to be printed as follows:

PRINT PULL SLIPS: (N)OT YET PRINTED/ (P)REVIOUSLY PRINTED/ (A)LL? N/

NOTE: The default is set to print those not yet printed, not NO.any case, ILS will respond by repeating the option chosen and replying PRINTING...

TO DELETE LIST OF PULL SLIPS:
If the user selects this option, ILS will respond by verifying the choice:

DELETE LIST OF PULL SLIPS ALREADY PRINTED? Y/

NOTE: The default is set to yes. If the user enters N instead, ILS will reply: NO DELETION

If the user selects YES, ILS will respond with the message:

PULL SLIPS ALREADY PRINTED HAVE BEEN DELETED FROM RECORDS.

After either scenario has been completed, ILS will return the user back to the point from which the user entered PRINT PULL SLIPS.

6.13.3 PP Special Features

There are no special features for PRINT PULL SLIPS at this time.

6.14 PATRON REGISTRATION

PATRON REGISTRATION permits authorized users to add names to the list of registered borrowers or to edit information in the patron record (address, telephone number, etc).

AVAILABLE INFORMATION

1. Overview of Patron Registration.
2. Step By Step procedures.
3. Special Features.

Enter the number of the type of information you want.

6.14.1 PR Overview

PATRON REGISTRATION permits authorized users to add names to the list of registered borrowers or to edit information in the patron record (address, telephone number, etc) of an existing patron.

Registration - ILS displays a patron registration form on the screen. As the user enters information the cursor moves down the screen to the next prompt. Optional fields may be skipped by pressing RETURN.

Editing - Existing patron records can be edited by entering the patron's name in response to NAME:. When the patron has been identified ILS displays the original registration form (with the blanks filled in) and the user may now edit the record.

6.14.2 PR Step By Step

PATRON REGISTRATION permits the user to ADD to or EDIT the patron record. The screen acts as a registration form which the user can fill in.

To ADD a new patron:

ILS may prompt:	User can enter:
NAME:	Patron's name in proper format (last name,first name).
TYPE:	Faculty, Student, Military, County resident, Institution or any other type of borrower allowed in the library. Information entered here determines which prompts will appear below.
TITLE:	Mr, Mrs, Ms, Miss, Dr, etc. If 'Institution' was entered

in response to TYPE: a prompt such as 'Contact Person' might be displayed instead of TITLE.

ILS may prompt:	User can enter:
DEPT:	This prompt might only appear if 'Staff' or 'Faculty' was entered in response to TYPE.
STREET: CITY: STATE: ZIP:	If this information changes the user may edit it. (see EDITing below)
EXPIRATION DATE:	ILS will automatically supply the date. The user may override it by entering another date.

NOTE: If the user enters a name which is already in the patron file ILS will display the matching name(s). To register a new patron with the same name press RETURN and follow the process above. To EDIT, see below.

To EDIT the Patron Record:

Enter the name of the patron. A list of names which match the entered name will be displayed. The user enters the index # of the correct patron and the patron's original registration will be displayed. The cursor will appear at the top of the form. If the data are to be left unchanged, the user should press RETURN and the cursor will move to the next prompt. If the data are to be changed, the user should enter the new data and a RETURN. The new data will replace the old in the patron record.

Press 'F' and RETURN to get to Special Features.

3.14.2 PR Special Features

1) Some information asked for on the registration form may be optional. For example there may be a space for HOME PHONE # and WORK PHONE #. A patron may not have a work phone number. The user may press RETURN and the cursor will move to the next item. Some information may be required in all cases. If the user pressed RETURN in response to TYPE: ILS would respond REQUIRED FIELD-PLEASE ENTER. In this case the user MUST enter a response.

2) While entering information the user can press a '-' to move the cursor up the screen. This allows the user to go back and correct mistakes made on the registration form. The user can move down by pressing RETURN as many times as necessary.

3) If any of the prompts on the registration form are unclear the user may enter a '?' and a RETURN. ILS will respond with the options available.

The next screen contains information for the system administrator.

3.14.3 Features of PATRON REGISTRATION for the System Administrator:

The prompts for PATRON REGISTRATION (and the structure of your patron file) depend on your local software. The Help text for PATRON REGISTRATION is written to cover various possibilities. You will probably wish to edit the Help Text for PATRON REGISTRATION to conform accurately to your specifications. The Step By Step paragraph should list each prompt exactly as it will appear on the screen. You may wish to indicate which fields are required and which are not. You can include the correct format for various prompts.

6.15 PATRON STATUS

PATRON STATUS permits authorized users to view the complete patron record as it was created during PATRON REGISTRATION and information on PATRON ACTIVITY. The information displayed varies with the type of patron.

AVAILABLE INFORMATION

1. Overview of Patron Status
2. Step by Step Procedures for Patron Status
3. Special Features for Patron Status

Enter the number of the type of information you desire:

6.15.1 PS Overview

PATRON STATUS permits authorized users to view information in the patron record (e.g., address, phone number etc.) and information displayed by PATRON ACTIVITY (e.g., titles checked out, titles on reserve, etc.).

6.15.2 PS Step By Step

To view PATRON STATUS the user must identify a specific patron in ILS. Information entered during PATRON REGISTRATION and current PATRON ACTIVITY will be displayed in the format below.

```
MR. JOHN A SMITH  *STAFF*                    EXPIRATION DATE: 03/19/82
ORGANIZATION: OSD              OFFICE SYMBOL: XYZW       ROOM#: 1234
PHONE: 555-1234                MAILSTOP: HERE
ADDRESS: 123 MAIN STREET
         SMALLTOWN  VA  22302  HOME PHONE: 123-4567

            ITEMS CURRENTLY CHECKED OUT
ID      TITLE                        AUTHOR        DUE DATE          RENEW
(All items currently checked out  will be listed.)

            ITEMS ON RESERVE
ID      TITLE                        AUTHOR      REQUESTED ON    NO NEED AFTER
(All items on reserve will be listed.)

TOTAL ITEMS CHECKED OUT:
```

MESSAGE(S)
RETURN TO CONTINUE: (ILS will again prompt for PATRON:)

For HELP with Patron Identification press '1' and a RETURN.

Any and all ILS functions involving patron data require that the patron be accurately identified in the ILS. See the section "Identifying the Patron" in the GENERAL INFORMATION chapter for a detailed discussion of options for patron identification.

6.15.3 PS Special Features

As of November 22, 1980 there are no known special features for this function.

6.16 PULL

The PULL procedure is used to identify items that are to be removed from the shelf, e.g., periodicals to be bound.

AVAILABLE INFORMATION

1. Overview of Pull
2. Step by Step Procedures for Pull
3. Special Features of Pull

Please enter the number of the type of information you desire:

6.16.1 PU Overview

The PULL procedure is used to identify items that are to be removed from the shelf (e. g., periodicals to be bound). This module works like Message in that both patron and item records are flagged with a message. In this case, the message is to pull an item (which may be assigned to a library patron or department) from circulation.

6.16.2 PU Step By Step

PULL allows the authorized user to identify an item (and a patron currently associated with it) so that the item can be removed from circulation. First the item must be identified to the system. The user must first enter one of the following:

a. the patron's identification number in the system
b. the patron's name (surname first) or a truncation of it
c. DP, then the identification code of a library department
d. PR, then full, new patron registration (for unregistered ones).

NOTE: The patron's bar code can also be wanded to identify the patron to the system.

Detailed Procedures-Patron ID for PULL

a. Enter the patron's id number, if known. The next prompt will be for the item identification. See DETAILED PROCEDURES for Item Identification for Pull below.
b. Enter the patron's surname or a right truncation of it, if known. If a truncation of the name is entered, a choice of candidates will be displayed. Select the corresponding index number and type it in. The surname and its id number in parentheses will be displayed. The next prompt will be for the id of the item to be pulled.
c. Not presently operational.
d. See HELP instructions for Patron Registration: Go up to the Circulation module and select #16 for General Functions. Select #13 of General

Functions for HELP on Patron Registration.

Next the system will prompt you for the item identification. The following choices are available to identify an item. Enter either:

a. the item's id number
b. AU (to identify by author's name)
c. CA (to locate by call number)
d. IS (to find the item by ISBN or ISSN)
e. LC (to identify by Library of Congress number)
f. TK (to identify by author key)
g. AT (to find by author/title key)
h. SE (to find by series)
i. MI (to flag the previously entered item to be pulled).

Detailed Procedures-Item ID for PULL

a. Provide the item's id number. If the item's record is found, the date is needed next.
b. Key in the author's name, surname first, or a truncation of it. If a truncation, provide the index number indicated when the name is displayed.
c. Type in the call number or a truncation of it for the item to be pulled. If a truncation, provide the index number as in b. above.
d. Key in the number of the item or its truncation. If a truncation, key in the index number which corresponds to the listed item to be pulled.
e. Provide the LC catalog number of the item.
f. Type the appropriate characters of the title key (the first 3 characters of the first word, first 2 of the next, first 2 of the third, and first of the fourth, separated by commas). When the item is found, type the index number of the correct item in the list.
g. Provide the appropriate letters for the author/title key (first 4 characters of each, separated by a comma). Next key in the index number shown.
h. Type the series heading or a truncation of it. If a truncation, enter the index number of the appropriate item.
i. ILS will display the item you had last entered in the system.

6.16.3 PU Special Features

1. Pull is a specialized form of Message. Thus when a patron or item record is retrieved, other messages may already be assigned to it.

2. When displaying information retrieved from a search of the files on a truncated term, ILS will display five (5) retrieved entries at a time. There may be more than five that were retrieved. To view all entities retrieved, continue to press F to advance in the list. When the list is exhausted, there will no longer be a prompt at the bottom of the screen saying THERE'S MORE. To go backward in the list, push B.

6.17 RECALL

RECALL is used to generate a notice to a specific patron, asking that an item currently checked out to that patron be returned to the library. It could be that another patron needs the item, or that the item is needed in binding or for an exhibit.

AVAILABLE INFORMATION

1. Overview of Recall
2. Step by Step Procedures for Recall
3. Special Features for Recall

Please enter the number of the type of information you desire:

6.17.1 RC Overview

RECALL is used to generate a printed recall notice to a patron, asking that an item currently checked out to her/him be returned to the library. The user is required to enter only item identification information.

6.17.2 RC Step By Step

RECALL requires the user to:

1. IDENTIFY THE ITEM: The user may use any one of the various item identification options. For an in depth discussion of this, press 1 to continue.

Items may be identified in various ways, including:

* using a barcode reader
* by item identification number
* by author
* by call number
* by ISSN/ISBN
* by Library of Congres number
* by title key
* by author/title key
* by series

For a detailed description of procedures and options for identifying an item, see the section "Identify Item" in the chapter GENERAL INFORMATION.

6.17.3 RC Special Features

As of November 20, 1980 there are no known special features for this function.

6.18 RENEW

RENEW is the process by which patrons are allowed to extend their loan of an item for some longer period. Renewal policies are locally determined and it is anticipated that each ILS library will want to add their own documentation in the HELP system, outlining local policies.

AVAILABLE INFORMATION

1. Overview of RENEW
2. Step by Step Procedures for RENEW
3. Special Features of RENEW

Please enter the number of the type of information you desire:

6.18.1 RE Overview

An item may be renewed by a patron by telephone or when both the patron and the item are present at the library circulation desk. The item to be renewed may be due that day, overdue, or even have some time left on the initial circulation period. Libraries vary in their policies on renewal. Depending on the type of patron, or whether the item was loaned via inter-library loan or not, the item may or may not be renewable. Some policies are:

- Items may be renewed for an additional circulation period.
- Items may be renewed, but only for a shorter period--one week rather than three.
- Items may be renewed only once or they may be renewed indefinitely as long as there are no reserves.
- No item may be renewed if it has been reserved for another patron.

Each ILS library will have to incorporate its local policies into RENEW.

6.18.2 RE Step By Step

To RENEW an item that has been checked out, the user must:

1. IDENTIFY THE PATRON
   Locate the record of a registered patron in the ILS Patron List.
2. IDENTIFY THE ITEM
   Locate the record of the item to be renewed in the ILS system.

3. COMPLETE THE TRANSACTION
Transmit the record of this renewal transaction to the ILS computer.

For more information on any of these steps enter the number of the type of information you want or:
/DIR - Directory of all available HELP information

6.18.2.1 Identify Patron

Any and all ILS functions involving patron data require that the patron be accurately identified in the ILS. See the section "Identifying the Patron" in the GENERAL INFORMATION chapter for a detailed discussion of options for patron identification.

6.18.2.2 Identify Item

Items may be identified in various ways, including:

* using a barcode reader
* by item identification number
* by author
* by call number
* by ISSN/ISBN
* by Library of Congres number
* by title key
* by author/title key
* by series

For a detailed description of procedures and options for identifying an item, see the section "Identify Item" in the chapter GENERAL INFORMATION.

6.18.2.3 RE Complete Transaction

After the correct patron and the correct item(s) have been identified into the ILS, the user must now COMPLETE THE TRANSACTION. It is not sufficient to stop here, because up to this point the data has only been sent to the terminal; it has NOT been transmitted into the computer. Completing the transaction is the way by which the information is transmitted from the terminal into the computer.

To complete a circulation subsystem transaction, the user must press either special function key 2 or the up arrow or - key. This will cause the data stored in the terminal to be transmitted to the computer and recorded in the Master Bibliographic File. In the event that a user does not want to complete the transaction (e.g. if a demo is being given, or if a patron decides at the last minute not to renew the book(s) after all) PRESS ABORT or the SPECIAL FUNCTION 8 key or / and return and the transaction will be erased completely. It will be the same as if the data had never been typed in in the first place. This also means, however, that if the user fails to press - or function 2 key IMMEDIATELY after entering the last item, the good data could be erased too!!!

6.18.3 RE Special Features

There are some special features in RENEW that users should be aware of which may be of help when performing RENEW. They are:

1. Due Date Override - Users may override the due date for an item after it has just been checked out by entering two characters, DD for Due Date. ILS will then ask for a new due date. Users may then enter an actual new due date or a symbolic new due date. An actual new due date means entering the actual date an item is due (4/30/80). A symbolic due date means advancing the due date a certain number of days from today and is entered as T+some number. If the item was originally due 4/15, by typing T+15 it will now be due on 4/30. NOTE* If the item just checked in is a serial temporary item, type 'S' instead of T+7. 'S' is equal to one loan period of 7 days.

2. The Patron at the "Bottom" of the Patron List - When searching the ILS Patron List for the correct patron, users must NOT assume that the last patron on the screen (the 5th one displayed) is the only patron with that name. If the last name on the screen seems to be the correct entry, users should still go FORWARD one screen to find out if there are any more entries with the same name. The chances of this happening are especially high for common surnames such as Smith, Jones or Brown.

3. Telephone versus In Person Renewal - ILS has been designed to accommodate renewals made in person or over the phone. If the renewal is a telephone renewal the user must locate the item to be renewed from the list which appears after the patron has been identified. If the renewal is made in person, by either the borrower or someone else for them, the user may either select the item from the list, or may wand the bar codes of the items instead. Before wanding over the bar codes, however, the user should be certain that the correct patron has been identified, otherwise you could renew an item to a person who never checked it out in the first place. (see above The Patron at the Bottom of the List.

6.19 RECEIPT CHECK-IN

The RECEIPT CHECK-IN procedure is used to provide a receipt to a patron for returning an item or for paying a fine (used in place of CHECK-IN).

AVAILABLE INFORMATION

1. Overview of Receipt Check-In

Please enter the number of the type of information you desire:

6.19.1 RI Overview

RECEIPT CHECK IN is used whenever a patron specifies that a receipt be generated, itemizing what he has just returned to the library. This feature has been designed to accommodate those ILS sites where personnel regulations may require documentation of a clear account before final administrative action (i.e., final payroll tabulation, release of college transcripts) may be taken.

NOTE: The software required for this activity is currently being developed. It is expected that future ILS releases will include this module.

6.20 RESERVE

The RESERVE procedure is used to identify an item to be put on reserve and begins the process to reserve the item.

AVAILABLE INFORMATION

1. Overview of Reserve
2. Step by Step Procedures for Reserve
3. Special Features for Reserve

Please enter the number of the type of information you desire:

6.20.1 RV Overview

RESERVE enables users to either add, edit, or delete requests to reserve items. RESERVE can modify entries in either an item queue or patron queue. The item queue lists all the patrons who are waiting to check out a given item; the patron queue lists all the currently checked out items a given patron has asked the library to reserve.

RESERVE is used to alert users that another patron would like to check out an item that has just been checked in. RESERVE sets up a message in ILS, "ITEM IS ON RESERVE...ENTER 'C' TO CONTINUE, RETURN TO TERMINATE..." which signals the user that the patron requesting the reserve be told that the item has been returned. Local ILS sites may determine whether the item is to be checked out and sent to the patron requesting the reserve, or if a notice is to be sent advising that the reserve will be cancelled if the patron does not appear within, e.g., 3 days to check out the item.

6.20.2 RV Step By Step

In RESERVE users may either:

1. ADD a reserve request,
2. EDIT a reserve request, or
3. DELETE a reserve request.

When either deleting or editing an already established reserve request, ILS will prompt the user to specify whether they wish to access the 'I'TEM QUEUE OR 'P'ATRON QUEUE. When creating a reserve request for the first time, ILS automatically prompts the user for PATRON: since no record currently exists in either queue.

For more information on any of the above choices the user should enter the number associated with that choice.

6.20.2.1 RV Add a Reserve

To add a reserve request the user must respond to the following ILS prompts:

A. IDENTIFY THE PATRON - To display detailed instructions for patron identification options enter '.

B. IDENTIFY THE ITEM - There are 8 item identification options, and one other option by which a message can be input for the last item entered. For more HELP on using any one of these options enter the number associated with that option below:

2) ITEM ID#	5) ISSN/ISBN	8) AUTHOR/TITLE KEY
3) AUTHOR	6) LC#	9) SERIES
4) CALL#	7) TITLE KEY	10) MESSAGE (ITEM)

C. IDENTIFY THE COPY# - Specify the copy# of the item to be reserved.

D. SET THE PRIORITY - Identify the order in which this reserve is to be handled.

E. SET DATE NOT NEEDED AFTER - Enter the last possible date the patron can wait. If the date entered has past, ILS will say "YOUR TYPED DATE IS PAST, TYPE FUTURE DATE".

F. ROUTING INFORMATION - If desired, the user may enter a free text message, detailing further what should happen to the item once it has been returned.

G. PRESS RETURN - The user must enter a carriage return to finish. ILS will prompt again to add the next reserve.

6.20.2.2 RV Edit an Item or Patron Queue

ILS allows users to edit an already entered reserve request by accessing either an ITEM QUEUE (i.e., all patrons waiting for a particular item) or a PATRON QUEUE (i.e., all items that a given patron is waiting to receive).

ILS begins by prompting the user:

'I'tem QUEUE OR 'P'ATRON QUEUE: The user must respond with either an I or P. ILS will prompt the user as detailed below in each respective case.

To edit ITEM QUEUE ILS will ask for:

ITEM: Select any one of the available access options. For more HELP on any option, enter the number of that option as it appears below:

*To edit PATRON QUEUE ILS will ask for:

*PATRON: The user may use any of the available patron id options. For more HELP on these options enter '.

```
      2)IID#  4)CA  6)LC  8)AT  10)MI    *
      3)AU    5)IS  7)TH  9)SE           *
                                         *
      Edit the ITEM QUEUE (cont'd)       *Edit the PATRON QUEUE (cont'd)
COPY: Enter the number of the item to    *# TITLE  AUTHOR  COPY  RESERVE EXPIRES
      be reserved.                       *1 Cats   Smith    1     7-4-80
                                         *
WHICH PATRON?: ILS displays the queue    *WHICH ITEM?: ILS will list all items
      of existing patrons and the user   *         reserved by the patron.
      must enter the number of the entry*
      to be edited. ILS will display the*POSITION IN QUEUE: Enter the number of
      following table:                   *the item to be edited.
                                         *
      # Patron   Copy   Not Needed After*COPY: The user must enter the correct
      1 Selander  1     5-25-80          *      copy number.
      2 Duncan    2     6-30-80  ...etc.*
                                         *DATE NOT NEEDED AFTER: Enter the new
PRIORITY: 1/The user may edit priority   *      date not needed after.
      of the reserve request(default=1).*
                                         *ROUTING INFORMATION:  A free text
ROUTING INFORMATION: A free text message*      message may be entered and
      may be entered and edited. The     *      edited. The user must REPLACE
      user must REPLACE a string of      *      a string of characters WITH a
      characters WITH a new string of    *      new string of characters.
      characters.                        *
                                         *
   We will send this book to Windery.    *   Route to Registrar first.
REPLACE: Wi WITH  Bi                     *REPLACE: first With last
   We will send this book to Bindery     *   Route to Registrar last.
```

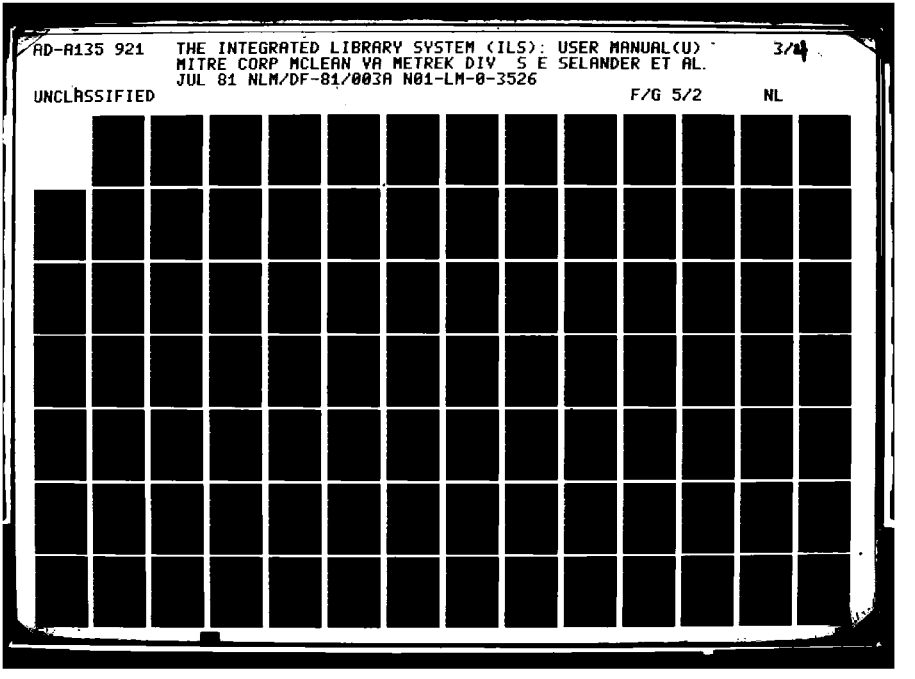
6.20.2.3 RV DELETE an Item or Patron Queue

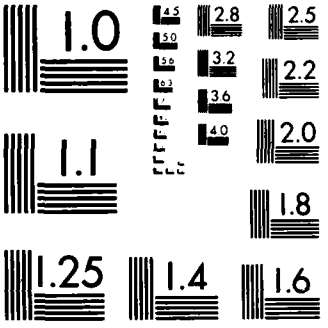
ILS allows users to delete an already entered reserve request by accessing either an ITEM QUEUE (i.e., all patrons waiting for a particular item) or a PATRON QUEUE (i.e., all items that a given patron is waiting to receive).

ILS begins by prompting the user:

'I'tem QUEUE OR 'P'ATRON QUEUE: The user must respond with either an I or P.

```
          To delete ITEM QUEUE           *     To delete PATRON QUEUE
           ILS will ask for:             *       ILS will ask for:
                                         *
ITEM: Select any one of the available    *PATRON: The user may use any of the
      access options. For more HELP on   *         available patron id options.
      any option, enter the number of    *         For more HELP on these options
      that option as it appears below:   *         enter '
      2)IID#  4)CA  6)LC  8)AT  10)MI    *
      3)AU    5)IS  7)TH  9)SE           *
      Delete the ITEM QUEUE (cont'd)     *Delete the PATRON QUEUE (cont'd)
                                         *
COPY: Enter the number of the item to    *# TITLE AUTHOR COPY  RESERVE EXPIRES
      be reserved.                       *ILS will list any number all items
                                         *reserved by the patron
                                         *
```


AD-A135 921
THE INTEGRATED LIBRARY SYSTEM (ILS): USER MANUAL(U)
3/4
MITRE CORP MCLEAN VA METREK DIV S E SELANDER ET AL.
JUL 81 NLM/DF-81/003A N01-LM-0-3526
UNCLASSIFIED
F/G 5/2
NL



MICROCOPY RESOLUTION TEST CHART
NATIONAL BUREAU OF STANDARDS-1963-A

WHICH PATRON?: ILS displays the queue of existing patrons and the user must enter the number of the entry to be edited. ILS will display the following table:

#	Patron	Copy	Not Needed After
1	Selander	1	5-25-80
2	Duncan	2	6-30-80 ...etc.

Delete the ITEM QUEUE (cont'd)

OK TO DELETE? NO// Enter a 'Y' and a RETURN to delete. Enter RETURN to leave the record unchanged.

DELETED (or) NOT DELETED

ILS will return to the prompt OPTION:

*WHICH ITEM?: Enter the number or the item.

*Delete the PATRON QUEUE (cont'd)

*OK TO DELETE? NO// Enter a 'Y' and a RETURN to delete. Enter RETURN to leave the record unchanged.

*DELETED (or) NOT DELETED

* ILS will return to the prompt OPTION:

6.20.2.4 Identify Patron

Any and all ILS functions involving patron data require that the patron be accurately identified in the ILS. See the section "Identifying the Patron" in the GENERAL INFORMATION chapter for a detailed discussion of options for patron identification.

6.20.2.5 Identify Item

Items may be identified in various ways, including:

* using a barcode reader
* by item identification number
* by author
* by call number
* by ISSN/ISBN
* by Library of Congres number
* by title key
* by author/title key
* by series

For a detailed description of procedures and options for identifying an item, see the section "Identify Item" in the chapter GENERAL INFORMATION.

6.20.3 RV Special Features

UPDATING THE ITEM STATUS DISPLAY
Whenever an item has a reserve request placed upon it, the item status display for that item is updated to show that a reserve now exists against that item. Once the item is returned, and the record of the reserve request has been deleted from NOTIFY RESERVE, the item status display for that item will again be updated to show that the item is now available for loan.

6.21 SHELF

The SHELF procedure is used by library staff to monitor information on items being used internally (as opposed to externally via CHECK OUT or RENEW.)

AVAILABLE INFORMATION

1. Overview of Shelf
2. Step by Step Procedures for Shelf
3. Special Features for Shelf

Please enter the number of the type of information you desire:

6.21.1 SH Overview

The SHELF procedure records internal usage of an item. SHELF is normally used by a shelver who passes a barcode scanner over the barcode label of the item to identify it. SHELF enables the user to count the number of times an item has been taken off the shelf but not checked out.

When the ITEM STATUS option is used, ILS will display a statistical record of any item. One line of this display appears below:

CHECKED OUT IN THIS PERIOD:__ INTERNAL USAGE: __

When an item is identified in the SHELF function, the count of INTERNAL USAGE is increased by one.

Press 'F' and a RETURN to go forward to Step By Step Procedures for SHELF.

6.21.2 SH Step By Step

SHELF consists of only one step:

1. IDENTIFY THE ITEM - It is assumed that the item will be identified with a portable barcode scanner. For information on this and other methods of identification, see below.

For more HELP concerning this step press '1' and a RETURN.

Items may be identified in various ways, including:

* using a barcode reader
* by item identification number
* by author
* by call number
* by ISSN/ISBN
* by Library of Congres number
* by title key
* by author/title key
* by series

For a detailed description of procedures and options for identifying an item, see the section "Identify Item" in the chapter GENERAL INFORMATION.

6.21.3 SH Special Features

As of July 8, 1980 there are no known special features for SHELF.

6.22 SET STATUS

The SET STATUS option is one way library staff can document the reason why an item is not available to patrons. It creates a note within the ITEM STATUS record advising users of an item's current status.

AVAILABLE INFORMATION

1. Overview of Set Status

2. Step by Step Procedures for Set Status

Please enter the number of the information you desire:

6.22.1 SS Overview

The SET STATUS function allows authorized users to associate one of the following exceptional statuses with an item:

- LOST
- FOUND (for previously LOST item)
- PATRON CLAIMS IT WAS RETURNED
- PATRON CLAIMS IT WAS LOST
- SNAG

If the status of an item has been set to one of the above, it is so noted in the Item Status display for that item. Subsequently doing a Check-out or Check-in of the item causes the Item Status record to be automatically updated.

6.22.2 SS Step By Step

SET STATUS is used to modify the status of an item in the Item Status Display. It is a collection of 4 separate routines, each of which is detailed below.

1) LO - for LOST if you are positive that the item is lost

2) FO - for FOUND if the item turns up later

3) PC - for PATRON CLAIMS it was RETURNED

4) PL - for PATRON believes it is LOST

5) SN - for SNAG

For more HELP with any of these steps enter the number of that step and press RETURN.

6.22.2.1 SS Lost

The LOST option in SET STATUS is used whenever library staff have conclusively determined that an item is indeed lost. Before this designation is put on the Item Status record, every attempt should be made to search the shelves for the item.

To change the item's status to LOST, the user must enter LO in response to the ILS prompt FUNCTION:. ILS will then prompt the user for any one of the regular ILS item id options. After the item has been identified ILS will prompt again for the next lost item. The user must press / and return to get out of the current SET STATUS option. ILS will take the user back to the place where the user was just prior to coming to SET STATUS.

To read about how to identify an item in ILS enter a 1 and a return.

6.22.2.2 SS Found

In SS, FOUND is used whenever an item, which has been previously declared LOST or PATRON CLAIMED RETURNED, is found and it's status needs to be updated. To update the item's status in the Item Status display, the user must enter FO in response to the ILS prompt FUNCTION:. ILS will reply by asking the user to identify the item via anyone of the item identification options.

For more HELP on item identification options press 1.

6.22.2.3 SS Patron Claims Returned

In SET STATUS, the option Patron Claims Returned is used whenever a patron states that they have returned an item which is currently missing. ILS keeps a separate "lost file" of items patrons claim to have returned, but which still have not been found after searching. The "lost file" tracks patrons who repeatedly claim to have returned a missing item. Each record in the file contains the item and patron id# and the date the patron was to have returned the item. Library management may want to set in-house guidelines to handle cases where patrons repeatedly claim to have returned missing items.

NOTE: Every time a CHECK IN or a RENEW is done, ILS will automatically search the "lost file" to look for a matching entry. If the item being checked in or renewed is in the "lost file," it's status will be automatically updated in the Item Status display.

To select this option, enter PC in reponse to the ILS prompt FUNCTION:.
To learn more about how to identify an item press 1.

6.22.2.4 SS Patron Lost

In SET STATUS, the Patron Lost option is used whenever it has been determined

that a patron has lost an item checked out to him. This status varies somewhat from Lost, insofar as it can be determined that the patron to whom the item was checked out, was responsible for the loss. (Had the item not been checked out to any patron the Lost option would be correct.)

To select this option enter PL in response to the ILS prompt FUNCTION:.
To learn more about how to identify an item press 1.

6.22.2.5 SS Snag

An item is assigned a status of SNAG if the library staff does not know exactly what the problem is, but want to identify that there is a problem of some sort with a given item. At some later time, the problem may be researched in detail, however, in the mean time a user who might be looking for that item can be informed that there is some known problem associated with the item.

6.22.2.6 SS Identify Item

In most cases, when the user is in SET STATUS the item will not be in hand. This may limit significantly the choices available by which an item may be identified. The full range of item identification options have been included in this HELP discussion, however, as it is possible that in any given instance one or more of these access options may be applicable.

Enter the number of the desired item identification option:

1. IID#= Item Identification #	6. TK = Title Key
2. AU = Author	7. AT = Author/Title Key
3. CA = Call Number	8. SE = Series
4. IS = ISSN/ISBN	9. MI = Message (for item just entered)
5. LC #= Library of Congress #	

Items may be identified in various ways, including:

* using a barcode reader
* by item identification number
* by author
* by call number
* by ISSN/ISBN
* by Library of Congres number
* by title key
* by author/title key
* by series

For a detailed description of procedures and options for identifying an item, see the section "Identify Item" in the chapter GENERAL INFORMATION.

6.23 VERIFY

The VERIFY procedure allows the authorized user to radically alter the way in which ILS operates. In VERIFY ON mode, ILS will display the patron name or item title every time a barcode label or library card is scanned with the barcode scanner. In VERIFY OFF mode (standard ILS operation), processing is much faster but patron names and item titles are not displayed.

AVAILABLE INFORMATION

1. Overview of Verify
2. Step by Step Procedures for Verify
3. Special Features for Verify

Please enter the number of the type of information you desire:

6.23.1 VE Overview

VERIFY sets a switch in ILS which determines whether or not the patron name or item title is displayed when a library card or a barcode label is scanned.

1. VERIFY=ON - When a patron or an item ID number is entered into ILS (during CHECK OUT or CHECK IN for example), the computer will go to the magnetic disk which stores all item and patron information and find the complete record for that item or patron. The name or title is then sent to the terminal and displayed on the screen.

2. VERIFY=OFF - When a patron or an item ID number is entered into ILS, the computer will record the ID and continue with the transaction. The patron name or item title will not be displayed on the screen. ILS will find the complete record on the magnetic disk later, while the user continues with other transactions. This helps the system process transactions more expeditiously when there are alot of patrons waiting to be checked out.

NOTE: The VERIFY switch affects only the current terminal and session.

6.23.2 VE Step By Step

To change the setting of VERIFY the authorized user may enter

/VE=ON OR /VE=OFF

in response to any ILS prompt. ILS will change the setting and return the user to the previous prompt.

It is also possible to change the VERIFY setting in a two step process. The user enters VE in response to the ILS prompt COMMAND: and then enters

either ON or OFF as appropriate.

6.23.3 VE Special Features

As of July 8, 1980 there are no known special features for VERIFY.

7 SERIALS CONTROL SUBSYSTEM

7.1 SCS INTRODUCTION

The Serials Control Subsystem is used to process all serial transactions including serials check in and routing of serials.

AVAILABLE INFORMATION

1. SCS OPTIONS
2. GLOSSARY OF THE ILS SYSTEM

For more information, select the number for the appropriate discussion.

7.1.1 SCS OPTIONS

The Serials Control Subsystem is composed of the following functions:

1. AR = ADD ROUTING
2. SC = SERIALS CHECK IN
3. GF = GENERAL FUNCTIONS

For more information, select the number for the appropriate discussion.

7.2 ADD ROUTING

The ADD ROUTING procedure permits authorized users to add/delete names on routing slips. When journals are checked in via SERIALS CHECK IN, routing slips for newly received journals may be printed, so that the journal may be routed to patrons or to their final destination, such as a branch library. The ADD ROUTING procedure permits users to add or delete names to routing slips that will be produced during SERIALS CHECK IN.

AVAILABLE INFORMATION

1. Overview of Add Routing
2. Step by Step Procedures for Add Routing
3. Special Features for Add Routing

Please enter the number of the type of information you desire:

7.2.1 AR Overview

When journals are checked in via SERIALS CHECK-IN, routing slips for newly received issues may be printed. The ADD ROUTING function allows authorized users to add names to or delete names from the routing slip produced for a particular title. ADD ROUTING requires the user to identify the patron and the bibliographic item.

7.2.2 AR Step By Step

In ADD ROUTING the user must:

1. IDENTIFY THE ITEM(S) TO BE ROUTED
   This section explains how to search through the ILS system for the appropriate item.
2. IDENTIFY THE PATRON(S)
   This section explains how to add/delete names from an item's routing slip.
3. EXIT FROM AR
   This section explains how to use the '/' command to exit from Add Routing.

For more HELP concerning any of these steps enter the number of that step and then press return.

7.2.2.1 Identify Item

Items may be identified in various ways, including:

* using a barcode reader
* by item identification number
* by author
* by call number
* by ISSN/ISBN
* by Library of Congres number
* by title key
* by author/title key
* by series

For a detailed description of procedures and options for identifying an item, see the section "Identify Item" in the chapter GENERAL INFORMATION.

7.2.2.2 AR Identification of Patron

Once the item has been identified, the user will want to iden , the patron(s) connected with that item's routing slip. The computer l prompt the user with the serial ID and copy number, and say:

(P)ERMANENT OR (T)EMPORARY? TEMPORARY/

There are two kinds of patron routing lists, permanent and temporary. A permanent routing slip consists of persons who wish to receive every issue of a serial as it is received by the library. A temporary patron list consists of patrons who wish to receive just one issue when it arrives, but not on a regular basis. Temporary patron lists must be deleted by the user after the specific issue is received. ILS will not automatically delete a temporary patron routing slip.

Once the status is entered, the user has several options. They are:

<A> Add Name to File
<D> Delete Name from File
<L> List Names in File
</> Go back to subsystem (see Exit From AR. Enter T, and then 3)
<~> Go back to function (see AR Special Features. Enter T,T,and 3)
<C> Change Temporary/Permanent

If the user discovers he has entered the wrong status command, he can change it with the 'C' option. For example, if he has entered 'P' for Permanent and realizes he wants to work with the Temporary status file, entering a 'C' will switch him to Temporary.

The Add Routing function is unique because it identifies first how the patron is affected on the routing slip and then identifies the specific patron. When the patron is identified the chosen function will be executed automatically.

The following functions relate directly to the routing slip. They are common to both the Permanent and Temporary status.

1) Add Name - How to add a name to a routing slip
2) Delete Name - How to delete a name from a routing slip
3) List Name - How to list all patrons on a routing slip.

Indicate by number the function you want.

7.2.2.3 AR Add Name

To add a name to an item's routing slip, the user must enter A in response to the ILS prompt OPTION:. ILS will reply:

PATRON:

The user must now begin to enter all the names that are to be added to the routing slip. After the last name has been entered, the user must enter a return. ILS will then prompt the user with a series of questions as part of the exiting process (see section 2.1.2.16, AR Exit Add Routing.
To get to this discussion enter the following command sequence: T,T,3.
To return to this discussion enter the following command sequence: T,2,1.)

To review the patron identification options press 1, or
(F) FORWARD to AR Delete Name, or
(T) to go to the top discussion.

7.2.2.4 Identify Patron

Any and all ILS functions involving patron data require that the patron be accurately identified in the ILS. See the section "Identifying the Patron" in the GENERAL INFORMATION chapter for a detailed discussion of options for patron identification.

7.2.2.5 AR Delete Name

TO delete a name from a routing slip, the user must enter D in response to the ILS prompt OPTION:. ILS will then display all the names currently on the list and will ask the user which name is to be deleted. The user may then enter the number corresponding to the name which is to be deleted.

The user must enter a carriage return in response to the ILS prompt when all appropriate names have been deleted. This is the first step of the exiting process (see Section 2.1.2.16, AR Exit Add Routing. To get to this discussion enter the following command sequence: T,T,3. To return to this discussion enter the following command sequence: T,2,2.)

7.2.2.6 AR List Name

List Name is used whenever the user wishes to view all the patrons who are currently on the routing slip. A sample list is shown below.

```
ADD ROUTING
SERIAL TITLE:  THE NIH RECORD   (  $8)              COPY# 1
TEMPORARY                    OPTION:_
```

1 MISS JANE BROWN
2 MR GEORGE CAREW
3 MAJ BRYAN JONES
4 MS MARY SMITH

NOTE: When the user selects permanent or temporary lists at the beginning of ADD ROUTING, this selection will impact what lists are displayed. If the user wishes to have the other list displayed it will be necessary to enter a C in response to the ILS prompt OPTION:.

7.2.2.7 AR Exit Add Routing

After the user has completed making changes to the routing slip, a return must be entered to begin exiting from ADD ROUTING. At this point ILS will prompt with (F)ILE OR (N)O CHANGE? NO/ . The system is set to default to NO CHANGE unless the user types in F. If the user wants to file the changes the correct response is F. Next ILS prompts with (P)ERMANENT/TEMPORARY? TEMPORARY/ TEMPORARY/. The system is set to default to TEMPORARY unless the user types IN P. If the user wants this routing slip to be a permanent one, P is the correct response.

The user may now exit from ADD ROUTING by using the / command. This will take the user to any other activity within ILS. NOTE: if the / key is pressed before the changes have been filed away, the changes will be lost.

7.2.3 AR Special Features

USE OF THE - KEY and PERMANENT VS. TEMPORARY LISTS

In ADD ROUTING, the - key is used to return the user to the begining point of either the item or patron identification stages of ADD ROUTING. This is done to enable the user to start that point over (e.g., spell a name a different way) while keeping the user within ADD ROUTING. Pressing the - key will erase just the stage of AR that the user was in the middle of entering (i.e just the last item or patron information entered.)

ADD ROUTING provides for both permanent and temporary lists. Permanent lists are composed of patrons who wish to receive all issues of a serial title each time it is checked in. Temporary lists are composed of patrons who wish to receive only a particular issue of a serial title; they may, e.g wish to read a particular issue which is devoted to an area of their interest. Users must specify which list is to be modified, either (P)ERMANENT OR (T)EMPORARY. To change a list from one status to the other, enter either P or T as appropriate.

7.3 SERIALS CHECK IN

SERIALS CHECK IN permits authorized users to record the receipt of the latest piece of a serial subscription.

AVAILABLE INFORMATION

1. Overview of Serials Check In
2. Step by Step Procedures For Serials Check In
3. Special Features of Serials Check In

Please enter the number for the appropriate discussion:

7.3.1 SE Overview

SERIALS CHECK IN enables library staff to maintain records of the receipt of each serial issue as it arrives in the mail. As an item is checked in, a barcode label may be generated for it, or the labels may be queued to be printed out in a batch at some later time.

Once the label has been affixed to the piece, it may be wanded whenever the item is circulated. When items are returned from the bindery, a new label will have to be attached to the hardbound piece. Consequently, this label will supersede the labels which were originally placed on each loose piece.

SERIALS CHECK IN requires the user to identify, in addition to the item, the year, month, day, volume, issue, copy and loan length of the piece.

7.3.2 SE Step by Step

To check in a serial via SERIAL CHECK IN, enter /SE in response to the ILS prompt COMMAND. ILS will prompt the user:

GENERATE BAR CODE? YES/ In both cases the default is set to YES.

PRINT BARCODE NOW? YES/ NOTE: To batch generate the labels later, enter N.

IDENTIFYING THE TITLE
ILS will next prompt for ITEM: TK=. Since the user must have the item in hand, the user will most likely want to identify the item by its title. Thus, ILS prompts for TK (title key) automatically.

The user must enter in the first three letters of the first major word, the first two letters of the second and third words, and the first letter of the fourth word. ILS will respond by displaying a list of five serial titles at a time in the format below:

NOTE: The serials title index is composed of the 245 and 246 fields of records

which contain 'periodical' in the a subfield of the 049 field.

```
INDEX TITLE(EDITION) & AUTHOR *** SERIALS ONLY ***
  1   The New England Journal of Medicine
  2   The New Yorker Magazine
  3   The New Zealand Medical Society Bulletin
  4   Obstetrics Today
  5   Operating Room Quarterly
```

At this point the user may:
- o Enter F or B to browse through the list
- o Enter another search key to try again.
- o Enter D and index # to display an item record
- o Enter index # to select the appropriate title.

IDENTIFYING THE ITEM
Having identified the title, the next step in SERIALS CHECK IN requires that the individual piece be identified. Press return to continue this discussion. There are seven elements which must be filled in for each serial issue which is checked in. They are:

1. Year of issue
2. Month of issue
3. Day of issue
4. Volume of issue
5. Any more copies to be checked in
6. Type of serial
7. Loan period

Each of these elements is discussed individually. For more information on any element, enter the number for the appropriate discussion.

NOTE: After completing the above 7 steps the following message will appear:

DATA IS STORED IN QUEUE. CHECK PRINTER POWER

You may now print out the barcode label if the printer is on.

7.3.2.1 SE Enter Year

When checking in serials the user must first identify the year of issue. The YEAR prompt in SERIALS CHECK IN is set to 80. If a 1980 serial is being checked in the user need only press return. If the user enters a question mark the following message will appear:

ENTER THE LAST TWO DIGITS OF THE YEAR, E.G. 80

7.3.2.2 SE Enter Month

To accommodate the wide variety of publishing frequencies of serials, ILS has designated 29 options for describing the time span of a serial issue. They are:

1 JAN	8 AUG	15 MAR/APR	22 OCT/NOV	99 UNCLASSIFIED
2 FEB	9 SEP	16 APR/MAY	23 NOV/DEC	
3 MAR	10 OCT	17 MAY/JUN	24 DEC/JAN	
4 APR	11 NOV	18 JUN/JUL	25 SPRING	
5 MAY	12 DEC	19 JUL/AUG	26 SUMMER	

6 JUN	13 JAN/FEB	20 AUG/SEP	27 AUTUMN/FALL
7 JUL	14 FEB/MAR	21 SEP/OCT	28 WINTER

NOTE: UNCLASSIFIED is used for (e.g., irregular) serials which do not match the above time spans. If option 99 is chosen ILS will prompt:

MONTH: UNCLASSIFIED
DESCRIPTION: (new span)

Enter the new time span.The issue date will then take the form: yr/(new span)/day, e.g. 80/JAN-JUN/00

7.3.2.3 SE Enter Day

In response to the prompt DAY, the user must type in the day of issue of the serial, if there is one. If the serial is a monthly or annual publication without a date just press return. A ? will cause the following message to appear:

TYPE NUMBER 1 TO 31 (DEPENDING ON THE MONTH.)

ILS will not permit the user to enter 31 for months with only 30 or 28 days, nor will it permit the user to enter 29 for a non leap year. If the user tries to do this, the following message will appear:

THE DATE YOU TYPED IS WRONG. PLEASE RETYPE THE CORRECT DATE.

7.3.2.4 SE Enter Volume

ILS will prompt the user to specify the volume, issue, part, and supplement of the serial to be checked in. It will have default settings for the next issue expected to be received as follows, e.g.,

VOL: 23 ISSUE: 12 OK? Y/

If another copy of the same issue (in this case, issue 12) is received instead, the user must type N. This will cause ILS to prompt individually for VOLUME, ISSUE, PART, SUPPLEMENT and COPY. If the piece being checked in is the first copy of a title, you cannot change the COPY 1/ default prompt.

7.3.2.5 SE Any More Copies

ILS will ask the user if there are any more copies of this issue to be checked in at this time. Since it is possible to receive two or more copies of a title on the same day, by this method users can quickly check in the other copies of the issue without having to re-enter all the data again. If the user enters a ? the following message will appear:

PLEASE TYPE # (1 TO 26)

7.3.2.6 SE Type of Serial

ILS will ask the user to make several decisions about the nature of the serial. It will ask the user to distinguish between the following categorizations:

(L)AW OR (G)ENERAL NOTE: The statistics derivable from these categorizations
(M)ONO OR (S)ERIAL may prove of use to library management.
TYPE:

There are currently 9 type categories for the form and subject area of serials. They are:

TYPE	DESCRIPTION	TYPE	DESCRIPTION	TYPE	DESCRIPTION
1	GENERAL	4	MILITARY-FOREIGN LANGUAGE	7	MICROFICHE-GENERAL
2	MILITARY	5	MICROFILM-GENERAL	8	MICROFICHE-MILITARY
3	FOREIGN LANGUAGE	6	MICROFILM-MILITARY	11	OTHER

Users may determine the type of serial by inspection.

7.3.2.7 SE Loan Period

The loan period associated with a serial may depend upon its copy number. ILS is presently set so that the loan period for a copy one title is automatically defaulted to non-circulating. This is done so that if only one copy of a serial is received, it can remain in the library until the other copies have either been received or claimed. Subsequent copies are set for a default of one week. This may, however, be overridden.

If the user enters a ? the following message will appear:

```
TYPE '1' FOR 1 WEEK
     '2' FOR 2 WEEKS
     '3' FOR NON-CIRCULATING ITEM
```

7.3.3 SE Special Features

USE OF THE UP ARROW KEY (-)
The up arrow key (-) is used in SERIALS CHECK IN to get back to a previous prompt after having entered a carriage return:

EXAMPLE: ILS has prompted for YEAR with a default of 80. The user hit return instead of entering 79. ILS next prompts for the month and then the day. Realizing that the wrong year was entered, the user steps back up through the prompts by pressing - repeatedly. The user must re-enter all the data for all prompts which the - has passed through, since the - erases as it travels back up to the prompt YEAR.

VIEWING THE HOLDINGS
To view the holdings of any serial, the user must break out of the ILS system, (by pressing the BREAK key) and see a ?. Next the user enters C %G to view the global EE. Enter a return when the computer prompts for DEVICE, and then enter -EE when the computer prompts for GLOBAL. The computer will then display the contents of global EE, for each serial title in alphabetical order, as follows:
-EE ("OBSTETRICS TODAY."80/10/5","15;6;0;0;1",801017)=*0*

This long string can be broken down into its component parts, some of which are partitioned by " marks, as follows:

```
"OBSTETRICS TODAY." This is the title of the serial.
"80/10/5"           This is the year/month/day/ of the issue.
"15;6;0;0;1"        This is the volume;issue;part;supplement;copy of the issue.
801017              This is the year/month/day the issue was checked in.
=*0*                This signifies the end of the string of information.
```

As each piece is checked in, a new string is created in global ^EE. The user must, however, view all the strings for all titles which alphabetically precede the string the user wants to see. As the list approaches the desired title, the user must press the CONTROL and the S keys at the same time to stop the list. Press the CONTROL and Q keys to start the list scrolling again.

DEFINED COPY

At the time a serial's bibliographic record is introduced into the Master Bibliographic File (e.g., via the processing of an OCLC tape), the c subfield of the 049 field is used to establish, for check in purposes, how many copies of the same title are to be expected during check in. Defined copy is understood to represent the total number of copies of a given serial title known to the system. In the event a user attempts to check in a copy whose number exceeds the number of defined copies which have already been checked in, the following message will appear:

```
EXTRA COPY! PRODUCE BARCODE? YES/
```

LOAN PERIOD DEFAULT

SERIALS CHECK IN allows the user to specify 3 types of loan periods: a week, two weeks, or non-circulating. In the interest of preserving the collection, the loan period for copy one has been set to default to non-circulating. In this way, the library is assured of having at least one copy on hand.

8 ADMINISTRATIVE SUBSYSTEM

8.1 AS INTRODUCTION

8.1.1 ADMINISTRATIVE SUBSYSTEM

The Administrative Subsystem is composed of options which enable authorized users to set various system parameters at local ILS installations. The local ILS system administrator will have responsibility for maintaining the security of these parameters, as the parameter settings represent a reflection of policy set by the library management. Consequently, only authorized users (i.e. those who have received either special training or authorization) should be expected to work in this subsystem.

The Administrative Subsystem is divided into 4 major sections:

1) AS Options
2) AS Overview
3) AS Special Features
4) ILS Glossary

For further information, select the number of the desired discussion above.

8.1.2 ADMINISTRATIVE SUBSYSTEM OPTIONS

There are 12 different options in the ADMINISTRATIVE SUBSYSTEM (AS). They are:

1. CP = CIRCULATION PARAMETERS
2. HM = HELP MAINTENANCE
3. JI = JOB INITIATION
4. JQ = JOB QUEUE
5. SA = SYSTEM ACTIVITY
6. SP = SYSTEM PARAMETERS
7. UD = USER DELETE
8. US = USER ADD/EDIT
9. VR = VIEW REPORTS
10. DO = DOWN SYSTEM
11. PQ = PATRON FILE DEFINITION
12. GF = GENERAL FUNCTIONS

For more information about any of these options select the number of the option desired or press F to FORWARD to AS OVERVIEW.

8.1.3 ADMINISTRATIVE SUBSYSTEM OVERVIEW

The ADMINISTRATIVE SUBSYSTEM is composed of 12 administration related options and 7 general function options which may be used in other subsystems as well. All of these options are organized within the HELP system in the same general format as follows:

(1) an overview of that option

(2) step by step procedures for that option

(3) a special features section for that option

For more information on any specific option:
Press B to go BACKWARDS to AS OPTIONS, or
F to go FORWARDS to AS SPECIAL FEATURES, or
T to return to the top of this discussion

8.1.4 ADMINISTRATIVE SUBSYSTEM SPECIAL FEATURES

ILS has several special features which the user needs to know in order to use the system effectively. Special Features used in the Administrative Subsystem have been divided into two separate dis ssions. They are:

(1) General Concepts

(2) Special Function Keys

Users should be aware of these general concepts and special function keys since they are used throughout ILS.

Enter the number of the discussion you wish to read more about, or
Press F to FORWARD to the Glossary, or
B to BACKUP to AS Overview, or
T to TRAVEL to the top paragraph.

8.1.4 General Concepts and Commands

Several GENERAL CONCEPTS are useful throughout the subsystems of the ILS. These include general commands such as:

D(isplay) -- for displaying the full record of an entry
F(orward) -- for moving forward through Item and Patron Lists
B(ackup) -- for moving backwards through Item and Patron Lists

Some keys have special meanings, such as:

: -- for combining two instructions into one step
/ -- for exiting out of a subsystem and into another or
going to another activity within a subsystem

The function keys are useful for accessing HELP, for abbreviated F(orward) and B(ackup) commands, and other things.

See relevant parts of the chapter GENERAL FUNCTIONS for more information.

8.2 CIRCULATION PARAMETERS

CIRCULATION PARAMETERS EDIT is used to to set the time intervals for a variety of ILS functions. These functions include the intervals for generating another search slip or overdue notice, archiving usage statistics, and purging lost items from the system.

AVAILABLE INFORMATION

1. Overview of Circulation Parameters Edit
2. Step by Step of Circulation Parameters Edit
3. Special Features of Circulation Parameters Edit

8.2.1 CP Overview

CIRCULATION PARAMETERS EDIT is used to to set the time intervals for a variety of ILS functions. The time interval between e.g. successive overdue notice generation, would be determined by ILS site library management, and ILS would be set to conform to this policy. With this function, ILS staff can more effectively maintain bibliographic control over the collection, insofar as ILS "remembers" to e.g. delete lost items from the Master Bibliographic File, or generate another overdue notice or search slip, after a specified time period. Consequently, only authorized users should be allowed access to this function.

8.2.2 CP Step By Step

CIRCULATION PARAMETERS EDIT enables the authorized user to set intervals for a variety of automated ILS functions. These intervals relate to a variety of circulation procedures and can range from as short as a few days to as long as a few years, depending upon local ILS site policy.

All the Circulation Parameters, as they would appear on the screen, have been included in this discussion. It is most likely that ILS sites will set the parameters initially and thereafter edit very infrequently. Any editing done must represent a change in library policy and should only be done with the authorization of library management. The Circulation Parameters are:

EXCEPTION FILE CO LIMIT: Sets a limit on the number of items a patron can borrow before his or her Patron Record is entered into the Exception File. As the patron nears his or her Check Out Limit, ILS will warn the user that this patron is approaching the Check Out Limit. The Exception File CO Limit must be less than the System CO limit.

SYSTEM CO LIMIT: Sets the maximum number of items a patron may borrow. ILS will not permit additional items to be checked out to this patron until some items currently checked out by him or her are returned.

RENEW LIMIT: Sets the maximum # of times an item may be renewed by a patron.

MONTHS BETWEEN USAGE STATS COMPILE: Sets the cycle for accumulation of usage statistics in the Item Status Display. At the end of each cycle, statistics for each item are archived, and then the counter is reset to zero.

YEARS USAGE STATS DETAIL: Sets the # of years that stats are archived. Stats are pushed down each time usage stats are sent to archives.

SNAG SLIPS TO GENERATE: Sets maximum # of snag slips generated before item is conceded to be lost.

MINIMUM INTERVAL BETWEEN SNAG SEARCH SLIPS: Sets number of days between
MAXIMUM INTERVAL BETWEEN SNAG SEARCH SLIPS: generation of successive slips.

MAXIMUM # OF OVERDUE NOTICES: Maximum # sent to a patron.

INTERVAL FROM DUE DATE TO 1ST OVERDUE NOTICE: # of days until notice created.

INTERVAL BETWEEN OVERDUE NOTICES: # days until next notice sent.

DAYS TO KEEP EXPENDIBLE ITEMS IN SYSTEM: # days copying requests are kept in system. Theses stats are used to track frequency of copying an item.

CHARACTERS IN EXPENDIBLE RECORD: Sets size of free text record which records what article was copied and for whom.

DAYS BEFORE PURGING LOST ITEMS: # days before all records of a lost item are deleted from ILS.

DAYS FOR AN EXTENDED LOAN: Maximum # days an item my be loaned on an
DAYS FOR SHORT TERM LOAN: extended or short term basis.

8.2.3 CP Special Features

Using the - Key in CIRCULATION PARAMETERS EDIT

In CIRCULATION PARAMETERS EDIT, users may forward through parameters that they do not wish to edit by pressing the carriage return successively. If the cursor should pass a desired parameter, however, the user may return up to that parameter by using the - key.

The - key will make the cursor return up the screen line by line until the cursor is placed beside the desired ILS prompt. The user may then enter any desired value at that point, and then either enter a / to get out of the activity (ILS will return to the Administrative Subsystem command level), or

continue to press carriage return to travel down the screen.

8.3 HELP MAINTENANCE MANUAL

8.3.1 HM BACKGROUND

Background

Originally developed by the Lister Hill Center for Biomedical Communications (LHNCBC) in 1978, the ILS Help System (HE) was designed to provide online assistance when using the Integrated Library System. To provide such a capability, the Help Maintenance (HM) system was developed to serve as the means by which HELP text could be created and edited for user viewing. The current version of the Help Maintenance System is a melding of the best features of the original version and several enhancements to the system.

Although they extensively interact with each other, HM and HE are two distict entities. Whereas HE enables users to read text only, HM enables users to perform text manipulation. Access to HE is unrestricted. However, access to HM should be restricted to the ILS system administrator or other personnel authorized to change the system.

Purpose

The purpose of this manual is to document the use of the Help Maintenance System in sufficient detail to enable local ILS sites to work effectively with it.

Scope

The scope of this manual includes documentation of all currently operational features of Help Maintenance.

For further information select either discussion below:

2. Introducing Help Maintenance
3. Working in Help Maintenance

To exit Help Maintenance, return to COMMAND with a - and return and then enter / and some function abbreviation or /EXIT.

8.3.2 HM INTRODUCTION

HELP MAINTENANCE is that part of ILS which enables local ILS sites to edit or develop Help text. It is composed of five basic elements, each of which is identified below:

1. The Paragraph
2. The Path
3. The Manual
4. The Directory
5. Text versus Structure

For further information about any of these basic elements enter the number associated with that discussion. The user may select any discussion and then continue forward via the F command; return via the B command; or exit via the - and the / keys.

8.3.2.1 The Paragraph

In ILS - Help Maintenance, the Paragraph constitutes the most basic unit of text. It is the most frequently accessed and edited entity in Help Maintenance. Although paragraphs characteristically exhibit two attributes, that of text and structure, this discussion focuses primarily on the textual attributes only. (For a more detailed discussion of structure and how it relates to text see section 2.5. To access this discussion, the user may either press F to forward through four other discussions or press T and then enter 5 to top out of this discussion and access the other directly.)Paragraphs are used as building blocks of information which, when linked together, create HELP text in ILS.

Paragraph defined in HM is understood to mean a logical unit of text. It may be, but does not necessarily have to be an English paragraph. It may instead be composed of a sentence or many sentences, or it may be composed of a chart, diagram or other graphic forms.

Since one Paragraph is a logical entity (as opposed to a physical entity), many English paragraphs may constitute one HM paragraph, and many HM paragraphs may be composed of a single English paragraph. This entire discussion of the Paragraph in Section 2.1.1 is composed of one HM paragraph, even though it contains several English paragraphs.

The distinguishing characteristic of all HM paragraphs is that they are always treated as a unit whenever they are displayed on a CRT terminal, linked to other paragraphs, or printed out in hard copy. Long HM paragraphs may not fit on one CRT screen when displayed. (NOTE: When using the Hewlett Packard Model 2645A terminal, only 17 lines of text may be displayed on each screen.) When this occurs, the first screen of text will be displayed. ILS will wait until the user enters a RETURN before displaying the second screen of text. (NOTE: The Hewlett Packard Model 2645A terminal will permit an HM paragraph

of up to five screens of text. For further information on the maximum size limit of an HM paragraph refer to Section 3.1.1 - Adding Paragraphs. To get to this discussion enter the following sequence of commands: T,T,3,1,1. To return to this discussion, enter the following sequence of commands: T,T,T,1.) The user may continue entering RETURN until the entire paragraph has been displayed.

It should be noted that even though it may take multiple CRT screens to display all the text in a paragraph, it is still a single logical unit. One could not display the middle or end of it without going through the beginning of it. It is therefore recommended that:

1) Text in HM paragraphs be limited to no more than 17 lines of text, and
2) Whenever an HM paragraph must exceed 17 lines of text, such text should be organized in such a way that each new screen of text begins with a new English paragraph, or other distinct physical form (e.g. table, illustration, new subsection heading.)

8.3.2.2 The Path

In ILS - Help Maintenance, each paragraph must be given an identity, or placed within a prescribed context, to be read in proper sequence. A relationship must, therefore, be constructed between paragraphs to link them to each other so that users may read the text contained in all the paragraphs in proper sequence.The establishment of such a relationship between specific paragraphs constitutes the creation of a path for those paragraphs.

In Help Maintenance any given paragraph may be in one or more paths. A paragraph which details how to identify an item, in the library collection may be linked to several discussions such as CHECK IN, RESERVE, or CHECK OUT procedures. Each time the same paragraph is used within the context of a different procedure in ILS, a separate identity (i.e. PATHNAME) for that paragraph must be created. A paragraph may have many pathnames associated with it, or it may only have one. When used in different paths the same paragraph may have separate sets of linkages coming before and after it. Thus, the same paragraph, linked into two different paths, could follow and be followed by the same or two different paragraphs which would take the user into different discussions. The figure below illustrates the linkage of paragraph A into different paths:

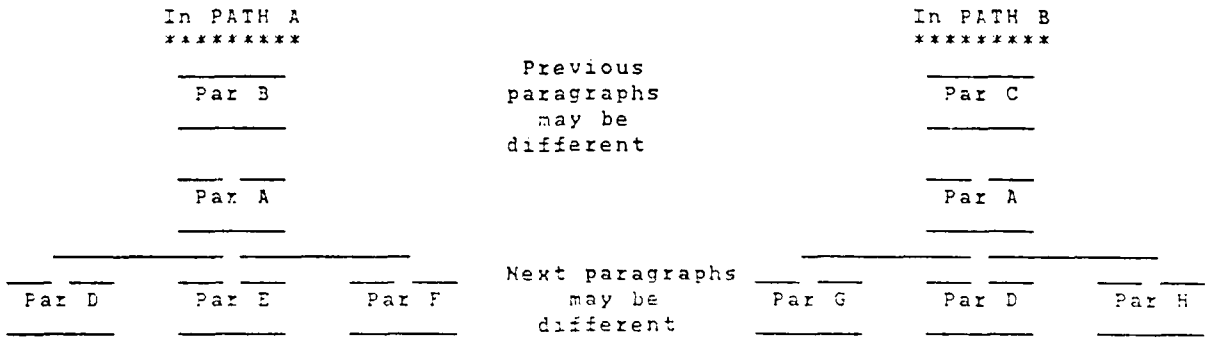


Figure 8-1. Example of One Paragraph in Two Paths

8.3.2.3 The Manual

To obtain a printout of any path, it is first necessary to put all of the paragraphs comprising that path into a manual. A manual is a path which is designed to be displayed in hard copy as opposed to online display.

Three characteristics distinguish manuals from paths intended for online display:

1. Manuals do not permit branching within the sequence of paragraphs. Since a manual is furnished to the user as a printed product rather than an online interactive display, there is no opportunity for users to 'respond' to options and change the display sequence. Instead, the paragraphs are printed out in a straight sequence.

2. Every paragraph in a manual must have certain print formatting information recorded in its structure. (See Section 3.4.7. To get to this discussion enter the following command sequence: T,T,3,4,7. To return to this discussion enter the following command sequence: T,T,T,2,3.)

3. All manual names must have the form 'M#', where '#' is an integer number from 0 to 99, e.g. M4, M76, M0. A maximum of 100 manuals may be created for an ILS site.

All of the paragraphs in a manual may also be included in ordinary non-manual paths or in any number of other manuals. Thus the same information may be made available in many different online and printed forms.

8.3.2.4 The Directory

The Directory is a list of all accessible paths in the HELP System. It lists for each path the pathname, any synonyms by which the path could also be referred, and the starting paragraph of that path. A pathname must be entered into the HELP directory before it can be directly accessed by users in the HELP System. This accomplishes two things:

1. It inserts the name into its correct place in an alphabetical list of path names, which a user can view by entering 'V D'.

2. It provides an entry point to the HELP System. When a user in HELP enters the two letter code for the pathname, ILS will display the first paragraph in that path. In cases where one path is linked to another, and direct access to the second path is not required, the path may be constructed and yet need not be entered into the directory.

It is advisable to refrain from making a directory entry for a path until the text of that path is in a finalized form. This enables writers of HELP text to review their work within Help Maintenance, and yet prevent premature access by users in the HELP System.

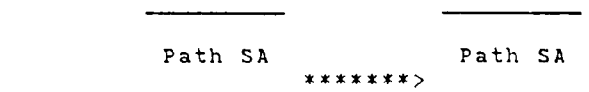
8.3.2.5 Text versus Structure

As was mentioned in Section 2.1 above, paragraphs are composed of two attributes, text and structure. Whereas text comprises the title, al the words, spaces, symbols and numbers, structure refers to the network of linkages between that paragraph and all those paragraphs which come either directly before or after it in logical sequence.

Each paragraph must have at least one previous paragraph number and may or may not have a next paragraph number. If a paragraph begins a path, it is considered the starting paragraph of that path. A starting paragraph may be directly accessible in the Help system or it may begin by following another paragraph in another path. To be directly accessible in the Help system its previous paragraph number (in its structure) must be zero. If the starting paragraph of a path follows another paragraph in another path, the previous paragraph number of the starting paragraph must be the number of the paragraph which it immediately follows. In either case, the number of the previous paragraph which precedes the starting paragraph of the path must be entered in the paragraph directory. Users may only access a path in the Help system if the starting paragraph number of that path and the previous paragraph number of the starting paragraph number have been entered into the path directory.

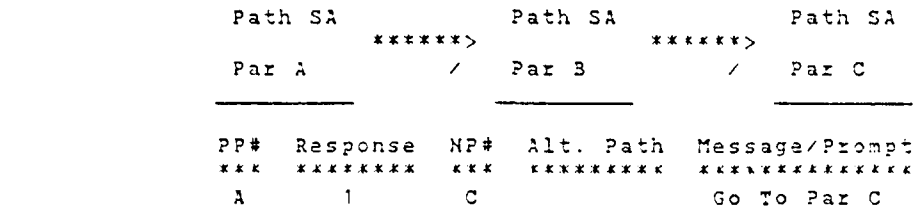
NOTE: previous paragraph number (PP#) means where you have just come from. Next paragraph number (NP#) means where you are going to next. Response means the letter or number the user must enter to see the next paragraph. Alternate path (Alt. Path) would only be used if the user wanted to access a next paragraph in another path. (see Section 3.3.1, Adding to the Directory. To get to this discussion enter the following command sequence: T,T,3,3,1. To return to this discussion enter the following command sequence: T,T,T,2,5.)

Figure 2-2 below illustrates two typical scenarios of a paragraph's structure in a given path (e.g., path SA).



PP#	Response	NP#	Alt. Path	Message/Prompt
***	********	***	**********	**************
0	1	B		Go To Par B

Condition 1. Paragraph A begins a new path.



Condition 2. Paragraph B is within a path.

Figure 2-2. Two Path Structures

It is often the case, however, that the structure between paragraphs expands into several next paragraphs becoming linked to a previous paragraph. When this occurs, the previous paragraph is considered a menu paragraph. There must be entered in the structure of the menu paragraph a separate linkage between each next paragraph and the menu paragraph. Typically, authors of HELP text create a list of numerical (as opposed to alphabetical) choices, each of which, if selected, displays a different next paragraph. An example of this may be found at the beginning of Section 2.1. Press T to view this example; press 5 to return to this discussion.)

A paragraph without a next paragraph is considered to be at the end of a branch in that path. Authors of HELP text frequently find themselves creating a menu paragraph which is accessed via multiple previous paragraphs and branches out to multiple next paragraphs. All previous and next paragraphs to a given paragraph may be referred to as neighbor paragraphs. When this occurs it is desirable to create linkages from all the neighbor paragraphs back to the menu paragraph so that the user may access any one of the other neighbor paragraphs. The structure of the menu paragraph must reflect the fact that, in this case, every next paragraph is also a previous paragraph to the menu paragraph. In Figure 2-3, below, a model of the logical relationship between a menu and several neighbor paragraphs within a path is presented. (ENTER F to continue with this discussion.)

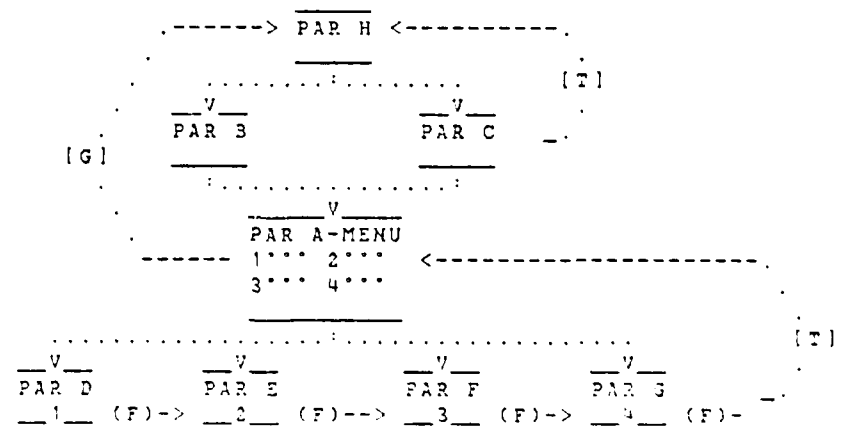


FIGURE 2-3 Logical Relationships Between Menu Paragraph (A) and its Neighbor Paragraphs (B-G).

LEGEND:

(T).....The user may travel to the top level discussion

.....All paragraphs on this level, across the model, are bounded by the command associated with the bracket. For example, a T command would apply to all paragraphs on the same level bounded by brackets.

(F)->...The user may forward to the next paragraph discussion

(G).....The user may skip across other linkages to go directly to a paragraph

In the above model, the user may travel through sample path SA, beginning at Par H as follows:

1) From Pars B or C the user may go to Par A below. (The user may NOT go directly from B to C).

2) From Pars B or C the user may go to Par H above.

3) Coming from B or C into Par A the user may go from Par A to any of the following paragraphs: D<E<F< or G.

4) Coming from Par A into D,E,F, or G the user may go to Par A above.

5) Having entered Par D,E, or F, the user may forward through the rest of the Pars on the same horizontal level which follow the one entered.

6) Once in Par G, whether entered from Par A or F, the user may forward up to Par A. This is done to enable users who have hit the F key repeatedly to end up at the top discussion, rather than come to a dead end branch.

7) Having entered paragraphs D,E,F or G from Par A, the user must be able to return to Par A and still be able to access any of the subordinate paragraphs to Par A (pars D,E,F, or G). This has the effect of treating Pars D,E,F, and G as both next paragraphs to Par A, as well as previous paragraphs to Par A. The structure of Par A, therefore, will reflect six previous paragraphs of Par A (Pars B,C,D,E,F, and G). A more detailed discussion of structure may be found in Section 3.1.3.2 Editing Paragraph Structure. (To get to this discussion enter the following command sequence: T,T,3,1,3,2. To return to this discussion enter the following command sequence: T,T,T,2,5,).

8.3.3 WORKING IN HM

Each of the five major subsections in Section 3 addresses how to work with a different element in Help Maintenance. This approach enables writers of Help Maintenance to follow a logical sequence as they make local modifications to the text of the Help System. The sequence of the five major subsections closely parallels the actual sequence one would go through to modify or create HELP text in Help Maintenance. The order of the minor subsections reflects the order in which these available commands are presented as system prompts to the user in Help Maintenance. It is presumed that writers of HELP text are authorized to access at least the HM function in the Administrative Subsystem. Thus, all detailed procedures begin at the HM command level. The five major subsections are:

1. Working with Paragraphs
2. Working with Paths
3. Working with the Directory
4. Working with Manuals
5. Working in the Glossary

For further information, enter the number for the appropriate discussion.

8.3.3.1 Working with Paragraphs

Proceeding from the general discussion of the nature of paragraphs in section 2.1 above, section 3.1 details the step by step procedures required to create and edit paragraphs in Help Maintenance. These procedures represent the first logical step in the creation of HELP text in Help Maintenance. They are:

1) Add Paragraph

2) Delete Paragraph

3) Edit Paragraph

4) Find Paragraph

5) Link Paragraph

6) View Paragraph

(Enter the number corresponding to the information you desire.)

8.3.3.1.1 Add Paragraph

To add a paragraph in HM, the writer must supply certain information which will uniquely identify the paragraph in the Help System. The user must also set two parameters, the default up path and the delete flag.

The default up path is an optional setting that can be used to create a linkage from the top of a path to a more general discussion (in another path) of some topic. The same effect can be achieved by creating a path to path linkage be designating a response (usually a ? for TOP) in the structure of the top paragraph in the path to take the user to another paragraph in another path. In Version 1.0 Help Maintenance, the default up path option was not used.

*Remember: Adding a paragraph to the database does not by itself make that paragraph accessible to users. It is still necessary to link it to some path or manual to enable HELP users to access it.

Procedure
=========

USER: Enter A P in response to the ILS prompt COMMAND: (A P means add par).

ILS: DEFAULT UP PATH>

USER: Enter any existing path name required to switch to a more general discussion, or RETURN to bypass this option.

ILS: CAN THIS PARAGRAPH BE DELETED (Y/N) >

USER: Enter the appropriate response. NOTE: It is strongly recommended that all paragraphs be deletable. A non-deletable paragraph may only be deleted by entering a special password not contained in this manual.

ILS: TITLE>

USER: Enter the desired title. Version 1.0 Help Maintenance convention has incorporated a path abbreviation-title format for paragraphs which discuss path specific procedures, and title only format for paragraphs which discuss procedures applicable to more than one path. For example, a paragraph which discusses how to add a name to the routing slip specifically in the Add Routing path would be titled AR Add to List. Correspondingly, a paragraph which discussed how to identify an item (independent of path) would instead be titled Identify Item.

ILS: COPY EXISTING PARAGRAPH (Y/N) N/

USER: Although the default is set to NO, if the writer of HELP text desires to copy text from some other paragraph into the new one, a Y value entered will direct ILS to prompt "COPY FROM PARAGRAPH # ". The user must then enter the number of the paragraph to be copied. ILS will display the title of this paragraph for confirmation. If the title is correct the user must enter a RETURN, thereupon initiating the transfer of text across paragraphs. The cursor will reposition at the top of the text which may now be edited.

ILS: ADDING TEXT-WHEN DONE, PRESS f2 TO STORE OR f8 TO EXIT-PRESS RETURN

USER: This message will appear on the screen whether the writer has copied text from another paragraph or not. After pressing a RETURN the paragraph may be edited and the creation process is completed. At the end of the editing session, the writer must press f2 to transmit the text in block mode. To terminate an editing session without transmitting the changes made, press the f8 key instead.

ILS: TEXT SAVED (if f2 has been entered)
or

TEXT NOT UPDATED (if f8 has been entered)

NOTE: If the writer decides to cancel out this paragraph before it has been completely created, pressing the BREAK key or entering an up-arrow (^) will destroy any entry made thus far. ILS will assign the same paragraph number the next time a paragraph is added.

8.3.3.1.2 Delete Paragraph

To delete a deletable paragraph from the HELP system the writer, at HM command level, must enter 'D P'. The following sequence will result:

ILS: PARAGRAPH# >

USER: Enter the paragraph number for the item to be deleted. You may abbreviate this step by typing 'D P P#' from Help Text Maintenance.

ILS: DELETE [PARAGRAPH P# - 'Title of the paragraph'] ARE YOU SURE? (Y/N)>

USER: Enter Y to confirm, or N to cancel the command.

ILS: DELETED!!!
The system confirms that it has deleted the item. The user may now continue to work at the command level.

8.3.3.1.3 Edit Paragraph

Having added a paragraph into Help Maintenance in section 3 1.1.1 above, the next logical step requires that writers of HELP text enter the text into the paragraph and create linkages between paragraphs. The creation process will require the writer to edit both text and structure.

Section 3.1.3 details the procedures for editing text and structure as two two separate discussions. Section 3.1.3.1 discusses editing paragraph text and Section 3.1.3.2 discusses editing paragraph structure.

Enter the number of the discussion you want.
1. Editing text 2. Editing structure

8.3.3.1.3.1 Editing Paragraph Text

To edit a paragraph in Help Maintenance the writer must first call that paragraph by its number in Help Maintenance by entering, e.g., 'E P 41 T' in response to the ILS Help Maintenance prompt COMMAND:. If the user is not certain of the correct paragraph number he or she may enter F P and some part of the title in response to the Help Maintenance prompt COMMAND, and ILS will display the number and title of all paragraphs with that word or words included in the title. Once the user enters the correct paragraph number the following sequence will result.

ILS: (T)EXT OR (S)TRUCTURE?

USER: The writer enters a T for text and RETURN. If desired, the writer may combine operations by entering, 'E P 41 T' instead.

ILS: EDITING TEXT-WHEN DONE PRESS f2 TO STORE OR f8 TO EXIT-PRESS RETURN

USER: After pressing return, the entire text will be displayed (in sequential screens if necessary) and then the first 17 lines will appear. The cursor will be positioned under the first character of the first character of the first line of the screen (the home position). The writer may now begin to enter text. Do not type any characters, including blank spaces in column 80, (the right most column on the screen as this will cause an unwanted blank line to appear in the Help text. Text may be modified by any one of the following means:

a) Pressing the roll up key to position the cursor at the end of the text, and then appending more text.
b) Inserting or deleting lines anywhere within the text.
c) Inserting or deleting characters anywhere within the text by positioning the cursor appropriately.

NOTE: To edit text in Help Maintenance the writer must have an HP2645A terminal or one with an equivalent capability !!

Enter:

C to continue back to the Adding to the Glossary discussion
F to forward to a discussion of how to edit paragraph structure
G to go to a discussion of the 'FIND' utility for paragraphs
T to travel to the top of this section (3.1.1.3).

8.3.3.1.3.2 Editing Paragraph Structure

To edit the structure of a paragraph the writer of Help Maintenance must enter, e.g., 'E P 122 S' in response to the HM prompt COMMAND:. The system will display the paragraph number and its title and then list any paths and manuals into which the paragraph is currently linked. Then the following sequence occurs:

ILS: PATH NUMBER OR NAME >

USER: Enter the desired path name abbreviation or its number as it appears on the screen. (To create a new path refer to Section 3.2.1 - Linking Paragraphs into Paths. To get to this discussion enter the following command sequence: T,T,T,2,5. To return to this discussion enter the following command sequence: T,T,1,3,2.)

ILS: PARAGRAPH = DEFAULT UP PATH = DELETE FLAG =
PATH PP# RESPONSE NP# ALT. PATH MESSAGE/PROMPT

NOTE: The above ILS prompts are defined below:

Paragraph = a stored block of text

Default Up Path = A path that would be linked hierarchcally above the current path, and into which the current path would extend as the user traveled out of the first paragraph of the current path.

Delete Flag = A notation in the paragraph structure which signifies that the paragraph may or may not be deleted.

PP# and NP# = Previous Paragraph # and Next Paragraph #

Alt. Path = Alternate Path which might follow the current paragraph's path, in the event that the next paragraph were in a different path.

Response = The letter or character which the user must type to access the next paragraph.

Message/Prompt = A brief message written in a paragraph's structure which reminds the user where each choice will go.

ILS will display the structure of the desired path for the paragraph selected All responses and associated previous and next paragraphs will be displayed. The model in Figure 3-1 below illustrates the structure of par 100 in path SA.

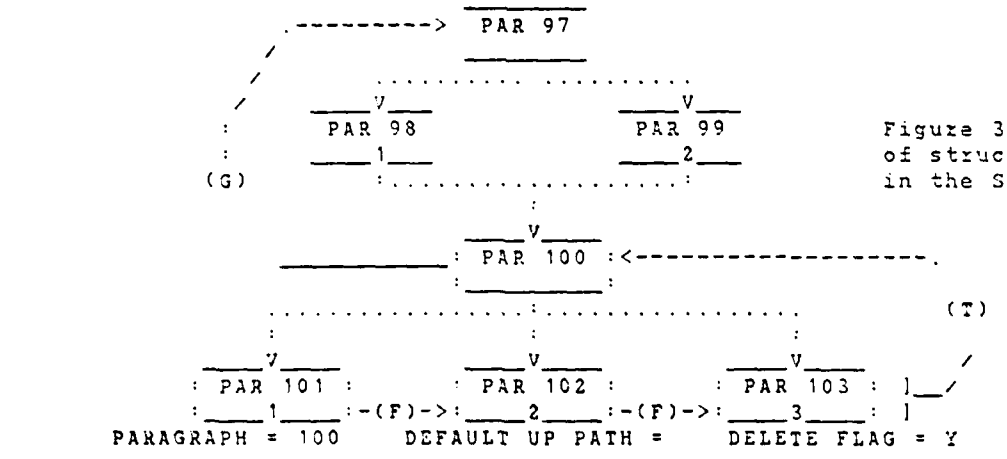


Figure 3-1. Illustration of structure for par 100 in the SA path.

PATH	PP#	RESPONSE	NP#	ALT. PATH	MESSAGE/PROM
SA	98	G	97		To The Top
SA	98	1	101		To Par 101
SA	98	2	102		To Par 102
SA	98	3	103		To Par 103
SA	99	G	97		To The Top
SA	99	1	101		To Par 101
SA	99	2	102		To Par 102

```
SA        99        3          103                        To Par 103
SA       101        .          .                                .
SA       102        .  (same as 98-99 above)                    .
SA       103        .          .                                .
```

Note: Each response, NP#, and message must be entered for the structure of par 100; this abbreviated version is only offered as a user aid for the discussion.

ENTER:

F To continue this discussion, and receive step by step instructions on how to edit the structure of paragraphs as shown above

G To go to a discussion of the 'FIND' utility for paragraphs

8.3.3.1.3.3 Editing Paragraph Structure (cont.)

When editing the structure of a paragraph ILS will display it in the format shown above, and the following sequence of prompts and responses will occur:

ILS: CHANGE DEFAULT UP PATH OR DELETE FLAG (Y/N) N/
USER: 'Y' to change either of these, 'N' or RETURN to leave them alone and go on. If you answered 'Y', then the following will occur.

ILS: DEFAULT UP PATH = _____ /
USER: Enter a new default up path or press RETURN to keep the existing one. To delete the existing default up path without entering a new one, type '*K' or '*KILL'. Any changes are effective immediately, even if you press '-' (or f2) to quit right after changing this data element.

ILS: DELETE FLAG = ['Y' or 'N']
You may change 'Y' (yes, paragraph is deletable) to 'N' (no, not deletable). If you try to change an 'N' to a 'Y' the system will ask for a special password. Any changes to the delete flag are also effective immediately, even if you press '-' (or f2) right after changing the flag.

ILS: PREVIOUS PARA# >
USER: Enter any one of the following as appropriate:
- o The number of an existing previous paragraph for which you wish to change the response or other information, or for which you wish to add a new response, or
- o The number of a new previous paragraph in this path, or
- o 'ANY' - meaning any previous paragraph other than ones specifically named, or
- o '*KILL[space]PP#' where PP# is a previous paragraph you wish to delete from this path (e.g. '*KILL 421'). The system will then ask: DELETE ALL ENTRIES WITH PP# = ___ (Y/N) >
  Enter 'Y' to confirm.
  If you have several responses coming from one PP# and only wish to delete one of them, do NOT kill the PP#. Kill the specific response instead (see below). Killing an entry ends the session and returns you to the top of the Paragraph Edit Module.

ILS: RESPONSE >
USER: Enter any one of the follwing as appropriate:
- o An existing response for the previously identified PP# if you wish to change its next paragraph, alternate path, or message, or
- o A new response which you wish to add to the previous paragraph, or
- o '*KILL[space]Response' where Response is an existing response value which you wish to delete. The system will then ask:
  DELETE RESPONSE '____' (Y/N) >
  Enter 'Y' to confirm. Killing a response ends the session and returns you to the top of the Paragraph Edit Module.

ILS: FULL REFERENCE ESTABLISHED
The system now knows what specific previous paragraph#/response pair you are editing, and continues with:
NEXT PARA# = ___ /

USER: If you have identified an existing PP#/response pair, the system shows the next paragraph Help users will branch to when they have come from that PP# and now enter that response. Type a new NP# or press RETURN to leave it alone. If no number is displayed, enter one.

ILS: SWITCH TO ALTERNATE PATH = _____ /

USER: Type any new path name you wish the Help users to switch to upon leaving this paragraph when they have come from the indicated PP# and enter the indicated response. Press RETURN to keep the existing alternate path. To delete an existing alternate path without replacing it with anything, type '*KILL'.

ILS: PROMPT = _____ /

USER: The prompt appears when the Help user answers 'CMD>' with '?' in the Help system. It is an explanation of what the above created response does. Enter a new prompt or press RETURN to keep an existing one.

ILS: SAVE THESE CHANGES (Y/N) >

USER: 'Y' to confirm.

ILS: CONTINUE ADDING AT R(esponses), P(PP#), or - to EXIT >

USER: Continue editing or return to the top of the Paragraph Edit Module. Note: If you modify the structure of one paragraph, e.g. to create a new 'next paragraph' in a particular path, then you may also need to modify the structure of that NP, by editing the PP# to create a new 'Previous Par.' in a particular path.

8.3.3.1.4 Find Paragraph

When working in Help Maintenance authors may leave paragraphs in a draft state. A draft state could include only partial text having been entered, or no structure having been entered. A paragraph may not be accessble in the Help System if 1) its structure has not yet been completed (see Section 2.1.5) 2) if the paragraph has not yet been linked to a path (see Section 3.2.1) or 3) even if it has been linked to a path, if that path has not yet been added to the paragraph directory (see Section 3.3.1 - Adding to the Directory. To get to Section 3.1.3 enter T.T T.3.1. To return enter T.3.1.4. To get to Section 3.2.1 enter T.T.2. To return enter T.1.4. To get to Section 3.3.1 enter

T,T,3,1. To return enter T,T,1,4.)

To access such a paragraph in Help Maintenance one must employ the FIND (F) command. The FIND command is a utility command which searches Help Maintenance for a paragraph based upon characters found in the title of that paragraph. This command is particularly useful when one does not remember the number of the desired paragraph or if one wishes to know the name or number of all paragraphs within a given path.

To optimize retrieval of paragraphs in Help Maintenance it is essential that authors of HELP text adhere to a convention in the assignment of paragraph titles. The following convention has generally been followed in the Version 1.0 ILS release, and it strongly recommended that local ILS sites adopt this procedure.

Convention Notation for Paragraph Titles

- All paragraph titles in Help Maintenance should reflect the central topic of discussion within the paragraph, e.g., Adding Paragraphs into Paths.

- All paragraphs which discuss material relevant to only one ILS activity should have the abbreviated name of that activity (which should also be the path name) precede the title of the paragraph. For example, a discussion of the procedure for completing a Check Out transaction should be labelled 'CO Complete the Transaction'.

- All paragraphs which discuss material relevant to a multitude of ILS activities should have only the topic reflected in the title. For example, a discussion of the procedure for identifying an item should be labelled Identify Item.

- All paragraph titles in Help Maintenance should be entered in full upper case.

Having established these conventions, the power of the FIND command may be enhanced. To execute this command the user must enter F P in response to the Help Maintenance prompt COMMAND:. The following sequence will result:

ILS: CHARACTER STRING TO FIND >

USER: Type in any characters or words known to be in the title. They must be in the exact same order as they would appear in the title. An entry of CI Identify Item would not retrieve the Identify the Item paragraph because the title entered did not include the word "the". Although upper/lower case distinctions are ignored, consistency in title format is desirable when it appears as HELP text.

The above steps may be combined by typing in the string immediately after invoking the FIND command, (e.g. F P CI Identify). If one or more title matches are found, the system will display the paragraph number and title of all matches retrieved as follows:

P#	TITLE
32	CI Identify Item
34	CI Identify Patron

8.3.3.1.5 Linking Paragraphs Together

Linking two or more paragraphs in Help Maintenance together requires that structure be created between all the paragraphs. If the paragraphs are all within the same path, the creation of structure is more simplified insofar as the author does not have to account for a switching of paths. If the paragraphs are both in two or more paths (one might be the last paragraph of path A and the other could be the first paragraph of path B) authors must create, in addition to the usual linkages, an additional entry which notes that a switch in paths has occurred.

Any given paragraph may be a part of one or more paths, as discussions in those paths may warrant. For example, the paragraph "Identify Item" pertains to many separate ILS functions (e.g. Check In, Check Out, Item Status, and Reserve) and would, therefore, be found in the, e.g., CI, CO, IS, and RV paths. It must be emphasized that the identical paragraph, incorporated into a variety of paths, is very likely to have a different previous paragraph and next paragraph in each path. Using sample paths SA and EX, Figure 3-2 below illustrates this point.

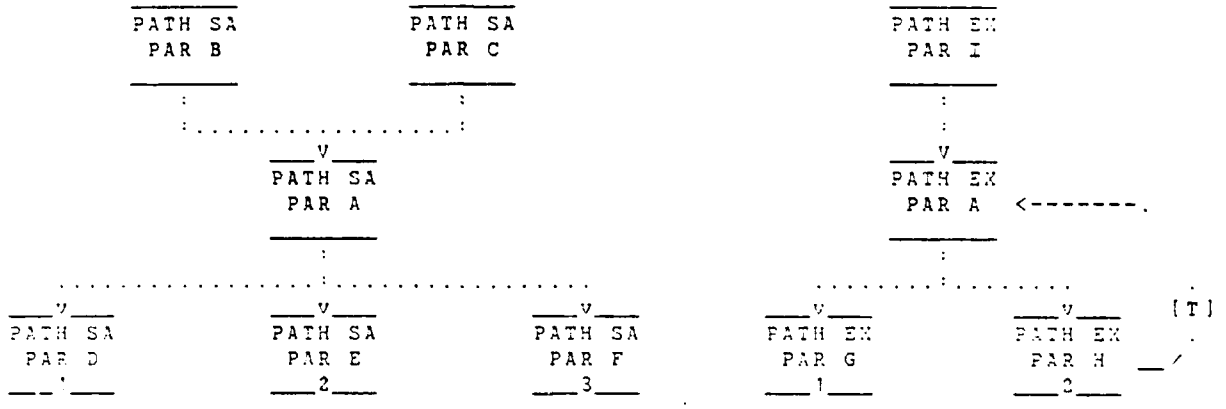


Figure 3-2 Illustration of one paragraph (A) in multiple paths.

Note: It is also entirely possible that par A in path EX could branch to paragraph D,E, or F in path EX as well.

The creation of one physical paragraph which may be linked to several paths minimizes the overhead associated with keeping the text current in all places. The versatility of one paragraph being linked into multiple paths represents a key concept of the Help System.

To effect these linkages the author must create appropriate structure in Help Maintenance for the affected paragraphs. To create such structure the author must enter E P par# S in response to the Help Maintenance prompt COMMAND:. The system will respond by displaying the paragraph number, paragraph title, and a list of all paths for which structure has already been entered. The author may either choose from the list of available paths or create linkages in a new path. In Figures 3-3 and 3-4 below, a display of the structure of par A (modeled in Fig. 3-2) is presented in the SA and EX paths respectively.

It should be noted that whereas in the SA path the user cannot go back up to paragraph A from pars D,E, and F via the T command, in path EX the user can instead return to Par A from both Pars G and H. Consequently in Figure 3-4 one will observe pars G and H serving as both next and previous paragraphs to Par A. It is essential that authors of Help Text enter in the structure of paragraphs G and H an entry to enable the user to get all the responses of Par A again, once the T command has returned the user to par A. If this reciprocal entry is not made (see Note in Fig. 3-4), the user will only get the text of par A without the response choices that were there when the paragraph was initially accessed from par I. The matrices displayed in Figures 3-3 and 3-4 both follow a common scenario which is presented below for the user.

```
USER:    E P (par A) S
ILS:     PAR A: A  -  TITLE: ******
         PATHS: 1.SA      2.EX
         PATH NUMBER OR NAME >  1 (see Figure 3-3)
                                2 (see Figure 3-4)
```

PATH	PP#	RESPONSE	NP#	MESSAGE/PROMPT
SA	B	1	D	GO TO D
SA	B	2	E	GO TO E
SA	B	3	F	GO TO F
SA	C	1	D	GO TO D
SA	C	2	E	GO TO E
SA	C	3	F	GO TO F

Figure 3-3 Display of Structure for Paragraph A in Path SA.

Enter C to continue this discussion.

Enter F to go to a discussion of View Paragraph.

PATH	PP#	RESPONSE	NP#	MESSAGE/PROMPT
EX	G	1	G	GO TO G
EX	G	2	H	GO TO H
EX	H	1	G	GO TO G
EX	H	2	H	GO TO H
EX	I	1	G	GO TO G
EX	I	2	H	GO TO H

Note: In the structure of pars G and H a corresponding entry would have to be made to complete the ability of entering a T to get to par A. It would be:

PATH	PP#	RESPONSE	NP#	MESSAGE/PROMPT
EX	A	T	A	TO THE TOP

Figure 3-4 Display of Structure for Paragraph A in Path EX

Although the number of previous paragraphs and next paragraphs used in Figures 3-3 and 3-4 have been minimized for ease of display, experiences with the Version 1.0 release have yielded situations where many previous paragraphs and several responses exist. To deal with the extensive number of entries which would be required to construct all the linkages the "ANY" feature was adopted. Instead of repeating the full range of responses for every previous paragraph coming into a given paragraph, inserting the word "ANY" in response to the ILS prompt 'Previous Paragraph #' would allow the response range to hold true for

any previous paragraph. In this way, the structure of any paragraph would show the responses from that paragraph only once. It is recommended that the "ANY" substitution be used whenever the lines of structure come close to filling one screen of structure (i.e. 17 lines). The convenience of "ANY" can be appreciated when there are either many previous paragraphs with a few responses each, a few previous paragraphs with many responses each, or when there are many previous paragraphs with many responses each.

Overuse of the "ANY" feature, however, will result in authors losing a sense of what previous paragraphs relate to the given paragraph, since the actual numbers will not be shown in the structure. By creating logic flow diagrams which chart the progression of an entire path from paragraph to paragraph will, however, serve in part to offset this loss.

8.3.3.1.6 Viewing Paragraphs

Occasionally, authors in Help Maintenance may want to look at text in a paragraph without invoking the edit capability of the system. If the structure has been completed for that paragraph this may be done in the Help System by calling up the path and stepping through it until the author gets to the desired paragraph. If the structure is not yet completed, however, or if the author would prefer to remain within Help Maintenance (even if there is structure), the VIEW command may be used to read through the text entered in a paragraph. Note, however, that whether there is any structure or not, the VIEW command in Help Maintenance will limit the author to seeing only one paragraph in Help Maintenance. The author may not go to any other paragraphs in Help Maintenance, as would be possible in the Help System (if structure has been completed).

To view the text of a paragraph in Help Maintenance enter 'V P par T' in response to the Help Maintenance prompt COMMAND:. The system will almost immediately display by scrolling the entire text of the selected paragraph. Once the entire paragraph has scrolled onto the screen the text will reappear with the title and first 17 lines of text for the author to view. By pressing the roll up or roll down keys as required, the rest of the text may be viewed.

To view the structure of a paragraph in Help Maintenance enter 'V P par# S' in response to the ILS-Help Maintenance prompt COMMAND:. The system will respond with:

```
PARA#: [par#] - [Title]
PATHS: 1. _____  2. _____  etc.

PATH Number or Name >
```

Enter the number from the above list, or the name of the desired path.

You may abbreviate this step by typing 'V P par# S Pathname' from the Help Maintenance prompt COMMAND:. The system will display the exact same information as would be seen in editing paragraph text or structure except that editing is not possible in this mode.

8.3.3.2 Working With Paths

The path is the means by which paragraphs may be organized into an order so that they may be displayed in sequence in the HELP system. When working with paths, authors of Help Maintenance must be careful to remember that each path carries with it its own context of responses. Specifically, a given paragraph which has two or more paths in its structure will have two or more different response ranges for that parargraph (i.e., the paragraph may be both preceded and followed by entirely different paragraphs in different paths).

The power and flexibility this affords must be paid for by an added work load in the creation process itself. Authors of HELP text must create each linkage between paragraphs and paths and this process can prove to be tediuos. Features such as the C (copy) instruction and the ANY instruction help to minimize the tedium. The following subsections discuss how to link paragraphs into paths and how to link a paragraph in one path to a paragraph in another path. For further information select the number of the appropriate option:

1. Linking Paragraphs into Paths 2. Linking Paths to Paths

8.3.3.2.1 Linking Paragraphs into Paths

Linking paragraphs into paths, in effect, organizes paragraphs into an ordered array of previous and next paragraphs, each of which may also branch to other paragraphs. To link paragraphs into paths, the author of HELP text must follow these steps:

1. Edit the structure of the first paragraph:
   In response to the Help Maintenance prompt COMMAND:
   the author must enter E P par# S.

   ILS will then prompt for PATH NUMBER OR NAME>
   The user must enter two letters (e.g. CO for CHECK OUT). This will designate that pathname in the heading of the paragraph's structure. ILS will verify this by prompting e.g. LINK TO NEW PATH CO (Y/N). Should the author enter an abbreviation which has already been used as another pathname for that paragraph, ILS will display the structure of that path instead. ILS will not let the same pathname be used for two paths in the same paragraph.

   ILS will then prompt for PREVIOUS PARAGRAPH #:
   Remember that with the T command, next paragraphs with a T command in their structure must also be treated as previous paragraphs in the paragraph they "top" into, so that the user may again reach any of the below paragraphs after having opted for the top paragraph. ANY may be used as a previous paragraph number, in the top paragraph's structure, to eliminate the tedium of typing in all of the responses for all previous paragraphs.

   ILS will then prompt for RESPONSE:
   The author must enter a value to enable users to get to the next paragraph. For example, a response of T will take users to a top discussion, a F will forward the user into another aspect of the overall discussion, a G will get the user to a discussion of an entirely different function.

   ILS will then prompt for NEXT PARAGRAPH:
   The author must enter the number of the next paragraph to be displayed in HELP when the response just entered is selected in HELP.

ILS will then prompt for SWITCH TO ALTERNATE PATH:
This instruction is used to link paths to paths. For further information press F to FORWARD to the next discussion.

ILS will then prompt for MESSAGE/PROMPT:
This is a required field, which may be used to prompt users to the response range. e.g., (F)orward to step by step, (T)o the top, (I) go to overview.

8.3.3.2.2 Linking Paths to Paths

Linking different paths together results in the user being taken from one discussion to another. In the structure of the two paragraphs, one being the last paragraph of the old path and the other being the first paragraph of the new path, an interface is constructed in the Alternate Path column which directs the flow of the discussion out of one context and into another. For example, in the discussion of the Circulation Subsystem, the user is traveling in the CS path. At the interface paragraph, CS Options, each of the next paragraph responses are in different paths, e.g., CO for CHECK OUT, CI for CHECK IN. In the CS Options paragraph structure there is an Alternate Path entry for every next paragraph. In the first paragraph of, e.g., CHECK OUT there is an Alternate Path entry only for the T response which would take the user outside of the CO path and back into the CS path.

To link two paths together we must assume that the individual paragraphs have already been created (see Adding Paragraphs), and linked into their respective paths (see Linking Paragraphs into Paths, above).

To link two paths together the author must first edit the structure of the first paragraph. In response to the HM prompt COMMAND: the author must enter E P par# S. When the structure is displayed, the author must enter a response value and a next paragraph number for that response. If the author enters a response which has already been entered, ILS will display the next paragraph also already entered as a default entry. The author may continue to press RETURN until the prompt SWITCH TO ALTERNATE PATH appears.

This feature enables authors to bridge from a paragraph in one path to another paragraph in another path. It is possible to have one response lead the user to a paragraph in a NEW path, while the other responses for that paragraph may lead to other paragraphs in the SAME path.

The author must enter the two letter path abbreviation for the new path. This instruction will mean that ILS will display, in HELP, the next paragraph entered WITHIN THE CONTEXT OF THE NEW PATHNAME. HELP users will be able to continue IN THE NEW PATH for the rest of that path's structure.

Authors must keep in mind what the impact to the general flow of discussion will be as a result of one path linking into another path. It may be necessary at some point to link back to the original path or to go on to link to a third path. In either case,the procedure would be the same as the one just outlined.

8.3.3.3 Working with the Directory

The Directory stores the following information for each path in the HELP system:

- the name of the path
- any synonym by which that path may also be known
- whether or not the path is deletable
- whether the path serves as an alternate entry point for another already established path
- the starting paragraph of the path
- the previous paragraph of the path
- a brief definition of the topic of the path

This section is divided into five subsections, each of which details how to perform a different function in the Directory. For further information, select by number the desired discussion below:

1. Add to the Directory
2. Delete from the Directory
3. Edit the Directory
4. Find entries in the Directory
5. View the Directory

8.3.3.3.1 Add to the Directory

To add a new path to the Directory, in response to the HM prompt COMMAND, enter the instruction A D. ILS will then prompt the author for:

NEW PATH NAME >

Type the new path to be entered into the directory. The term must be all upper case, 10 characters or less in length, and include no spaces. The first character must be alphabetic (A-Z).

You may abbreviate this step by typing 'A D Pathname' from the HM prompt COMMAND.

SYNONYM FOR PATH >

If this path is a synonym for an existing path, type the name of the existing path; if not press RETURN. NOTE: If you do enter a path name, no other information is required. ILS will insert the new pathname in the Directory, define it as a synonym for the existing path named here, and return to the COMMAND level of Help Maintenance.

IS PATH DELETABLE (Y/N) >

'Y' allows authors to subsequently delete this path from the Directory.

'N' protects the path from deletion unless a special password is entered.

ALTERNATE ENTRY FOR PATH >

If this new path is to be an alternate entry point for an existing path, enter the name of the existing path here; if not press RETURN.

STARTING PARA# >

Enter the number of the first paragraph to be displayed whenever the HELP user asks for HELP for this path activity.

PREVIOUS PARA# >

If the path being added is an entirely new path, which is to be accessed directly (i.e., without having to go through other paragraphs first) enter ZERO as the previous paragraph number.

If this path is an alternate entry point for an existing path, enter the number of the previous paragraph which precedes the paragraph which begins the alternate entry. For example:

> Assume that OLD is an existing path and NEW is to be an alternative entry point for OLD. Assume also that NEW path will begin at para# 100, and that in OLD path, para# 99 is the previous paragraph to para# 100. The author would have to make para# 99 the previous paragraph to para# 100, the starting paragraph of NEW path, so that no change to the structure of para# 100 would have to be made.

25 CHARACTER DEFINITION >
Enter a short description which details what the path is about, e.g., for CHECK IN - erase item loan to patron.

SAVE THIS ENTRY (Y/N) >
'Y' keeps the entry in the Directory and sends the author to HM COMMAND.

The new path name is now in the directory and may be used by Help users. If this is a new path name (not a synonym or an alternative entry point for an existing path) and if not already done, authors of Help Maintenance must now create the structure which links paragraphs into the path (see Section 3.2.1, Linking Paragraphs into Paths. To get to this discussion enter the following command sequence: T,T,2,1. To return to this discussion enter the following command sequence: T,T,3,1.)

'N' erases the entry entirely and sends the author to HM COMMAND. No record of this entry will be maintained anywhere in ILS.

NOTE: Reference to the Directory is understood to mean the display of path data. Users should keep in mind the distinction between the path and manual directory (i.e., a directory of manual titles and starting paragraphs)

3.3.3.3.2 Delete from the Directory

To delete a path from the Directory, in response to the HM prompt COMMAND, enter the instruction D D. ILS will respond with PATHname >

Enter the name of the path to be deleted from the Directory.
You may abbreviate this step by typing 'D D Pathname' directly instead.

ILS will reply: DELETE PATH [Pathname] FROM THE DIRECTORY

ARE YOU SURE (Y/N) >

ILS verifies that this is the path to be deleted. Type Y to confirm or N to erase the entire transaction. In either case ILS reverts to HM COMMAND.

DELETED|||
The system confirms that it has deleted the item. NOTE: A non-deletable path may only be deleted via a special password.

8.3.3.3.3 Edit the Directory

Editing the Directory in Help Maintenance follows the same general sequence of events as Adding to the Directory. To begin the editing process, enter E D in response to the ILS prompt COMMAND. ILS will reply with:

PATHname >
Type the name of the path you wish to edit.

You may abbreviate this step by typing 'E D Pathname' directly from the HM prompt COMMAND.

EDITING PATH = [Pathname]
ILS will verify the path which is to be edited.

SYNONYM FOR PATH = _____ /
To make this term a synonym for some other path, enter the name of that path here; to delete any synonyms which already exist for this path, enter *KILL; otherwise press RETURN.

If you create a synonym, no other information is required. The system will update the directory and return you to the HM prompt COMMAND.

DELETE FLAG = _ /
Y allows the path to be deleted.

N protects the path from being deleted unless a special password is used.

RETURN leaves the existing value of the flag unchanged.

ALTERNATE ENTRY FOR PATH = _____ /
To make this term an alternative entry point for a path, add the alternate path's name or replace the existing alternate path name.

To delete an existing alternate path entry type '*K'.

RETURN leaves the existing situation unchanged.

STARTING PARA# = ___ /
Enter a new starting paragraph number or RETURN to leave the existing one unchanged.

PREVIOUS PARA# = ___ /
Enter a new previous paragraph number or RETURN to leave the existing one unchanged.

NOTE: Be sure that this is a valid previous paragraph number under this path name (or the alternate path name if this is an alternate entry point) in the 'starting' paragraph's structure.

25 CHARACTER DEFINITION = _____
NEW >
Enter a new definition of this path in the directory or press RETURN to keep the existing one.

ILS will now display the complete record for this path in the directory and reply:

SAVE THIS ENTRY (Y/N) >
Y to confirm and return to the HM prompt COMMAND.
N to erase the entire transaction and return to the HM prompt COMMAND.

8.3.3.3.4 Find Entries in the Directory

To find a path in the Directory, enter F D in response to the ILS prompt COMMAND. ILS will then reply:

CHARACTER STRING TO FIND >
Type in any string of letters (upper or lower case) which would appear in the pathname. You may abbreviate this step by entering F D String directly from the HM prompt COMMAND.

ILS will respond by displaying the following information:

- o path name
- o the term for which this term is a synonym (if there is one)
- o delete flag
- o alternate path (if there is one)
- o previous paragraph number
- o starting paragraph number
- o path definition

8.3.3.3.5 View the Directory

To view a DIRECTORY entry, enter V D in response to the HM prompt COMMAND. ILS will reply:

VIEW DIRECTORY FROM >
Enter any pathname or character string. The system will display the first five directory entries alphabetically following the name or string entered. You may abbreviate this step by entering V D [PATHNAME] directly from the HM prompt COMMAND. ILS will then display:

- o pathname
- o path for which this term is a synonym (if any)
- o delete flag
- o alternate path (if any)
- o previous paragraph number
- o starting paragraph number
- o path definition

Press return for an example of how the table actually appears:

PATH	SYN FOR	DEL	ALT. PATH	PP#	SP#	DEFINITION
CO		Y		0	40	CHECK OUT AN ITEM
CI		Y		0	39	CHECK IN RETURNED ITEM

8.3.3.4 Working with Manuals

Manuals are hard copy print outs of the on-line HELP system. They may be used as orientation materials for staff prior to their "hands on" experience with the system. Just as paragraphs are linked together to form paths, manuals must operate within their own path structure. That is, a manual path must be created for all paragraphs constituting the manual. If a paragraph in the CO path were placed in a CHECK OUT manual, that paragraph would have to have a second path to link the sequence of output when the manual was being printed.

If a paragraph were in several paths, e.g., the item identification paragraphs are a part of CHECK OUT, CHECK IN, RESERVE, and others, and subsequently, were a manual for CHECK OUT, CHECK IN, and RESERVE to be produced, one would have to add to the structure of that paragraph three new paths, one for each manual.

Manuals are identified by number in the manual directory. Manual paths are created from the number of the manual itself. For example, if a CHECK IN manual were listed in the manual directory as manual #1, all paragraphs in the manual would have to have their structure amended to include the M1 path. For more information on how to chain paragraphs into manuals see section 3.4.2 Chaining Paragraphs into Manuals.

The following eight subsections each address a different function associated with the creation of manuals. They are:

1. Add Manuals
2. Chain Paragraphs into Manuals
3. Chain Manuals into Manuals
4. Delete Manuals
5. Edit Manuals
6. Find Manuals
7. Produce Manuals in Hard Copy
8. View Manuals

For more information, select the number associated with each discussion.

3.3.3.4.1 Add Manuals

To add a manual into the ILS system, it is first necessary to create a record of that manual in the manual directory. NOTE: The manual directory and the path Directory are two entirely different entities. To clarify which directory is being referenced, "the Directory" (initial cap) shall represent display of all path data, and "the manual directory" (lower case) shall represent the display of all manual data.

To add a manual to the manual directory, in response to the HM prompt COMMAND, enter the instruction A M. ILS will respond with:

MANUAL# >

Enter the number of the manual which you wish to add. The number must be of the form 'M#' where '#' is an integer number, e.g., 'M99'.

You may abbreviate this step by typing 'A M M#' directly from the HM prompt COMMAND.

TITLE of M# (25 chars max) = /

Switch to upper/lower case if desired, then enter the title of the new manual.

DEFINITION (25 chars max) = /
Enter a brief definition. This definition will NOT be printed when the manual is printed out. It is only used in the display of the manual directory.

STARTING PARA# = /
Enter the number of the paragraph which you wish to be the first one in the printed manual.

You may type a manual number (e g. 'M5') instead of a paragraph number. That will cause the entire manual you have referenced to be printed out as the first chapter in the new manual. For more information on this, see, Section 3.4.3 Chaining Manuals to Manuals. To get to this discussion enter the following command sequence: F,F. To return to this discussion enter the following command sequence: T,1.

SAVE THESE CHANGES (Y/N) Y/
A RETURN or a Y will confirm that this is to be saved.
N will erase the entire transaction from the system.

8.3.3.4.1.1 Chain Paragraphs into Manuals

Chaining paragraphs into manuals closely parallels linking paragraphs into paths. The term chaining is used to refer to the process of ordering paragraphs for the purpose of producing hard copy. Whereas linking paragraphs allows one to branch out responses into different directions, chaining restricts the organization to a sequential order of paragraphs which follow each other when they are printed out.

It is recommended that authors first add a manual to the manual directory before attempting to create linkages. This will assure that the manual can be printed out to verify that the paragraphs were chained correctly (see Section 3.4.1 Adding Manuals above. To get to this response enter the following command sequence:T,1. To return to this discussion enter the following command sequence: F.)

Since the chaining process requires the structure of each paragraph in the manual path to be edited, the author must begin the chaining process by editing the structure of the first paragraph in the manual. NOTE: it is most commonly the case that an entire HELP system path may be transformed into a manual; however, manual paths afford the author the same flexibilities as do other paragraph paths, insofar as any paragraph may start a manual whether or not it starts a path in HELP.

In response to the HM prompt COMMAND, enter the instruction E P. ILS will reply:

PARAGRAPH# >
Enter the number of the paragraph which you wish to link into the manual.

EDIT T(ext) or S(tructure) >
Enter S for structure. You may abbreviate the above steps by typing in

E P par# S directly from the ILS prompt COMMAND. ILS will display the paragraph number, its title, and then list all paths in which the paragraph currently participates.

PATH Number or Name >
Enter the name of the manual path that you wish to create. The name of the manual path must equal the manual number. For example, Manual #23 CHECK IN must be created in the M23 path. Manual numbers must be positive integers only.

LINK TO NEW PATH 'M#' (Y/N) >
Y confirms that you wish to link this paragraph to the manual referenced. ILS is now ready to begin chaining the paragraph into the manual. N will return you to Path Number or Name > .

(MANUAL M#)
PREVIOUS PARA# = /
Enter the number of the paragraph which precedes this paragraph. If this will be the first paragraph in the manual, enter 0 (zero). Also, if this paragraph follows a manual, enter 0 as the previous paragraph.

NEW PAGE (Y/N) = /
Y causes the printer to start at the top of a new page when it prints this paragraph. N means that the paragraph will print out on the page immediately after the paragraph before it.

NEW CHAPTER (Y/N) = /
Y causes the title of this paragraph to appear as a chapter heading in the table of contents and the text of the manual.

NEW SECTION (Y/N) = /
Y causes the title of this paragraph to appear as a section heading in the table of contents and the text of the manual. If NEW CHAPTER is set to Y then ILS automatically sets this response to N and the NEW SECTION prompt will not appear.

NEW SUBSECTION (Y/N) = /
Y causes the title of this paragraph to appear as a subsection heading in the table of contents and the text of the manual. If NEW CHAPTER or NEW SECTION is Y then NEW SUBSECTION is automatically set to N and the prompt will not appear.

NEXT PARA# = /
Enter the number of the paragraph which you wish to follow this one in the print sequence. If this is the last paragraph press RETURN.

You may cause an entire manual to be printed next instead of another paragraph by typing a manual number in the form 'M#' instead of a paragraph number. For more information see section 3.4.3.1.Chaining Paragraphs and Manuals into Manuals.

SAVE THESE CHANGES (Y/N) >
Y confirms that these changes are to be saved. N will erase this entire transaction from the system.

NOTE: If you have linked this paragraph to previous and next paragraphs as part of a sequence, you MUST add this paragraph as a next paragraph

in the previous paragraph's structure, and as a previous paragraph in the next paragraph's structure. To print the manual, you MUST also add into the manual directory all the relevant manual information (see Section 3.4.1, Add Manuals. To get to this discussion enter the following comand sequence: T,1. to return to this discussion enter the following command sequence: F.)

8.3.3.4.1.2 Chain Manuals to Manuals

Manuals may be chained to each other in much the same way that paragraphs may be chained to construct manuals. When two or more manuals are chained together to form a third manual, the two component manuals are referred to as mini manuals and the third manual is referred to as a major manual.

Mini manuals must each be identified in the manual directory before an entry can be made for the major manual. Typically, a major manual may be composed of a set of functions or routines, such as CIRCULATION or GENERAL FUNCTIONS. Correspondingly, mini manuals will most typically consist of one function each, e.g., CHECK IN, CHECK OUT, ITEM STATUS. In this way, a mini manual may be updated within a major manual, while still keeping the rest of the major manual intact. Mini manuals may be printed out individually, or they may be printed out as a part of the overall major manual, depending upon which format is more desirable at the time.

To chain two or more manuals together, the author must first enter the manual directory by entering, in response to the HM prompt COMMAND, the instruction: A M. This instruction, ADD MANUAL, is used because you are in effect adding the major manual to the directory after you have added all the mini manuals individually. Since the instructions are almost identical between adding manuals and chaining manuals together the reader is referred to Section 3.4.1 Add Manuals (To get to this discussion enter the following command sequence: T,1. To return to this discussion enter the following command sequence: F,F.)

NOTE: The only difference between chaining manuals and adding a manual in the manual directory, is that when you are chaining manuals, the starting paragraph will be a manual # in the form M# where # is a positive integer. If there are multiple mini manuals involved, ALL MINI MANUALS MUST be entered in sequence, as they would print out, in the manual directory. A chain of, e.g., four mini manuals being chained into a major manual MUST have all four mini manuals entered in sequence in the next paragraph column of the manual directory.

8.3.3.4.1.3 Chain Paragraphs and Manuals into Manuals

Sometimes, it may be necessary to chain together bits and pieces of paths into a manual. Although it is highly recommended that mini manuals be created and chained together wherever possible, in those situations where this cannot be done easily, the author may have to mix paragraphs and manuals into the chain. When this occurs the author must enter in the next paragraph column of the manual directory, the manual numbers for every manual until a paragraph number comes next in the chain.

EXAMPLE: Major manual, M10, composed of M2, M3, par45 and M6, is to be chained.

In the manual directory, M2, M3, and M6 would have to be first created individually via the A M instruction (see section 3.4.1 Adding Manuals). Then an entry for major manual M10 would be made via the A M instruction. When ILS prompts for the starting paragraph of M10 the author would enter M2 M3 45 in the manual directory. In the structure of par 45, in the M10 path, enter zero as the previous paragraph and M6 as the next paragraph. The next par column of M10, in the manual directory must end with a par number so that ILS can get its next instruction from the structure of par 45.

8.3.3.4.2 Delete Manuals

To delete a manual from the manual directory, enter D M in response to the HM prompt COMMAND:. ILS will reply with

MANUAL# >
Enter the manual number for the item to be deleted.

You may abbreviate this step by typing D M M# directly from COMMAND prompt.

DELETE ENTRY FOR MANUAL M# - [Title of the manual]

ARE YOU SURE (Y/N) >
The system first repeats what you have asked it to do, displaying some information to enable you to be sure that you are deleting what you want to delete.

Type Y to confirm; type N to erase the entire transaction.

DELETED!!!
The system confirms that it has deleted the item.

Note: If an item you are attempting to delete has been previously defined as non-deletable, the system will not delete it without a special password. Consult ILS system administrator for further information.

8.3.3.4.3 Edit Manuals

To edit a manual type E M in response to the HM prompt COMMAND.ILS will reply:

MANUAL# >
Enter the number of the manual which you wish to edit. The number must be of the form 'M#' where '#' is an integer number, e.g., 'M99'.

You may abbreviate this step by typing E M M# directly from the HM prompt COMMAND.

TITLE of M# (25 chars max) = _____ /
Switch to upper/lower case if desired, then retype the title if you wish to replace the old one. Otherwise press RETURN.

DEFINITION (25 chars max) = _____ /
Retype the definition if you wish to replace the old one. Otherwise press RETURN. This definition will NOT be printed when the manual is printed.

out. It is only for use in Help Maintenance.

STARTING PARA# = ___ /
Enter the number of any paragraph which you wish to be the first one in the printed manual, or press RETURN to accept the existing starting paragraph.

You may type a manual number, e.g., 'M5') instead of a paragraph number. That will cause the entire manual you have referenced to be printed out as the first chapter in the new manual. If you type a manual number, or accept one which already exists, the system will respond with:

INCLUDE MANUAL M# (Y/N) Y/
'Y' or RETURN to confirm.

The system will prompt again for another

STARTING PARA# = ___ /
You may enter another manual number, a paragraph number, or RETURN.

Another manual number will cause that manual to be included as Chapter 2, and so on until you type or accept a paragraph number or RETURN (see also Section 3.4.3.1, Chain Paragraphs and Manuals into Manuals. To get to this discussion enter the following command sequence: ?,3,1. To return to this discussion enter the following command sequence: F,F.)

If you type RETURN, the system will prompt with:

END OF MANUAL M# (Y/N) Y/
'Y' or RETURN to confirm.

SAVE THESE CHANGES (Y/N) Y/
Y or RETURN confirms and returns to the top of Help Maintenance.
N erases the entire transaction.

8.3.3.4.4 Find Manuals

To find a manual in the manual directory enter F M in response to the HM prompt COMMAND. ILS will reply:

CHARACTER STRING TO FIND >
Type in any character string you wish to search for. The string must be the exact same order as it would appear in the manual title. To minimiz missing a correct entry, ILS convention does not allow the use of stars, hyphens, or extra spaces in the formulation of the title. In this way, authors stand the best chance of retrieving what they are looking for. Upper/lower case distinctions are ignored. TEST will retrieve TEST, Test, and test equally well.

You may abbreviate the above steps by typing F M string directly in response to the HM prompt COMMAND.

ILS will respond by displaying:

manual number
title
definition
starting paragraph number

The actual format of this table would appear as follows:

M#	TITLE	DEFINITION	STARTING P#
M35	THE CIRCULATION SUBSYSTEM	ALL CS FUNCTIONS	M22 M4 M5 M16 M36
M36	CHECK OUT	LOAN ITEM TO PATRON	39

8.3.3.4.5 Produce Manuals in Hard Copy

To produce a manual in hard copy, the writer of Help Maintenance may combine several instructions or proceed one by one with each instruction individually. Each instruction will be explained individually, although the reader must keep in mind that all of these options could be entered all at once, directly in response to the HM prompt COMMAND.

Enter P M to begin printing out a manual. ILS will list for you all manuals which have been entered in the manual directory. You must then enter the number of the manual you want to print out or generate internally. (NOTE: any time you update paragraphs in the HELP system, it will be necessary to regenerate all manuals which use that paragraph. A manual which has had editing done to its text MUST be regenerated; otherwise you will get output which will not have the changes in it that you made since the last time the manual was generated.) If you enter P M M# ILS will prompt for Generate, Print, or Generate and Print.

Choose G if you wish to generate a new version of the manual without printing it out.

Choose P if the manual has not been edited since the last time it was generated, and you want to print it out now.

Choose GP if the manual has not been generated before, or if it has been edited since the last time it was generated.

If you want the manual printed out, you will then have to specify the device you want used. Each ILS site will have to set the device number(s) locally to reflect the in-house configuration. The writer will have to enter an integer corresponding to the device desired. (If there is only one in-house printer the device number should be 1.)

The last thing you must specify is the number of copies you wish printed out. ILS will automatically continue to print out manuals until all specified copies are out.

8.3.3.4.6 View Manuals

To view a manual title, in response to the HM prompt COMMAND, enter V M.

VIEW MANUAL TITLES FROM >

Enter a manual title or character string. The system will display the first five manual titles alphabetically following the title or string you entered. The displayed elements are:

- o title
- o manual number
- o definition
- o starting paragraph number

You may abbreviate this step by typing V M string directly from the HM prompt COMMAND.

Press return to view a sample of the actual display:

TITLE	M#	DEFINITION	STARTING P#
MAILOUT	M8	THE MAILOUT FUNCTION	41
MESSAGE	M6	MESSAGE FUNCTION	49
NEWLY CATALOGED ITEM	M18	NEWLY CATALOGED ITEM	120

8.3.3.5 Working in the Glossary

AVAILABLE INFORMATION

1. Adding to the Glossary
2. Deleting from the Glossary
3. Editing the Glossary
4. Finding words in the Glossary
5. Viewing the Glossary
6. Printing out the Glossary

8.3.3.5.1 Add to the Glossary

To ADD to the glossary, enter the instruction A G in response to the HM prompt COMMAND. ILS will reply: ENTER TERM TO BE ADDED >. Enter the full word to be added to the glossary. ILS will next prompt: DO YOU WANT TO ADD 'word' TO THE GLOSSARY? Y/ Y or a RETURN lets you continue. N will cause the last prompt to reappear.

NOTE: You may combine the above two steps into one by entering A G Word.

PRESS RETURN TO BEGIN DEFINITION OF 'word':
At this point ILS will behave exactly as if you were creating text in a paragraph. Key in the definition as if you were typing on a typewriter.

For more information on how to edit paragraphs refer to Section 3.1.3.1, or press C to continue this discussion on-line. To get to section 3.1.3.1 enter the following command sequence: T,T,1,3. To return to this discussion enter the following sequence: T,T,5,1.

After completing the definition, press f2 to transmit text in block mode, or f8 to close the file without implementing any revisions to the text. ILS will return the writer to the HM prompt COMMAND.

8.3.3.5.2 Delete Glossary

To DELETE a term from the glossary enter the instruction D G (or combine steps by entering D G Word) in response to the HM prompt COMMAND. ILS will reply:

ENTER TERM TO BE DELETED > Enter either the full word or a truncation of the word to be deleted. ILS will reply either:

SEARCHING FOR 'word'... FOUND 'word'
ARE YOU SURE YOU WANT TO DELETE TERM 'word'? N/
OR
SEARCHING FOR 'word'... NO MATCH TO 'word'
and immediately reprompt for ENTER TERM TO BE DELETED >

Assuming that one or more terms matches the query, each of them will be displayed by number. Enter the number of the term to be deleted. ILS will reply:

ARE YOU SURE YOU WANT TO DELETE TERM 'word'? N/.
N will cancel the transaction. Y will delete the term.

8.3.3.5.3 Edit Glossary

To EDIT in the glossary the writer of Help Maintenance must enter the instruction E G (or to combine steps E G T or E G D) in response to the HM prompt COMMAND. ILS will ask you to specify (T)erm or (D)efinition. The writer of Help Maintenance may edit either the term, e.g., change plurals to singular, or add a scope note to the terms, or the definition of the term.

ILS will respond ENTER THE TERM TO BE EDITED. After the user enters the word or a truncation of the word ILS will reply:

SEARCHING FOR 'word'...FOUND 'word'
EDIT (T)ERM OR (D)EFINITION

If the writer enters T, ILS will reply: CHANGE 'word' TO: 'new word'. and the writer may make any changes to it in exactly the same way as any other word in the HELP system would be edited. After entering the new word, ILS replies: 'new word' CREATED, 'word' DELETED.

If the writer enters D, ILS will reply: PRESS RETURN TO EDIT THE DEFINITION Of 'word'. At this point ILS will display the existing definition of the word as an individual paragraph in Help Maintenance. This enables the writer to edit the text in the same way all other HELP system paragraphs are edited.

At any point prior to the actual editing of either the word or its definition, the writer may cancel the editing transaction by entering an up arrow (↑) in response to any of the prompts. Once inside the definition paragraph, however, the writer may press function key f3 to leave unchanged, or f2 to update, the text (assuming that an HP 2645A terminal is being used).

8.3.3.5.4 Find Glossary

To FIND a term in the glossary, enter F G in response to the HM prompt COMMAND: ILS will respond: ENTER TERM TO BE FOUND >. After entering the desired word, or truncation, ILS will reply:

```
SEARCHING FOR 'word'... FOUND 'word'
VIEW DEFINITION OF 'word'? Y/
```

Y will cause the word and its definition to appear on the screen. ILS will be ready to accept the next word to be found. If the writer wishes instead to exit from the glossary, entering an up arrow (↑) will cause ILS to revert back to the HM COMMAND level.

If a truncation is entered, ILS will display all words in the glossary which match the letters entered and tell the writer how many matches were found. The writer may select the word by its number or enter a new word instead. The below example illustrates the scenario.

```
ENTER TERM TO BE FOUND > t

SEARCHING FOR 'T'... 5 MATCHES:

1. TAG              3. TERMINAL        5. TRUNCATION
2. TAPES            4. TEXT

ENTER 1-5, OR ANOTHER TERM:
```

8.3.3.5.5 View Glossary

NOTE: Although VIEW GLOSSARY and FIND GLOSSARY are quite similar, there is one distinction between them. FIND GLOSSARY will tell you that the term you are looking for is indeed in the glossary. At that point you have the option of viewing the definition, if you care to read it. VIEW GLOSSARY assumes that you want to view the definition of any word entered, and will, therefore, display the definition immediately, without asking you if you wish to view it.

To VIEW a glossary entry, enter V G in response to the ILS prompt COMMAND. ILS will reply: ENTER TERM TO BE VIEWED >.After entering the term or a truncation, ILS will reply:

```
SEARCHING FOR 'word'... FOUND 'word':        or, if there are multiple matches
SEARCHING FOR 'word'... N MATCHES:
```

If you asked for a unique term, ILS will immediately display the definition. If you select a term from the list of matches, ILS will then display the term and its definition. In either case, ILS will prompt for the next term to be

displayed.

8.3.3 5.6 Print Glossary

This activity is being programmed. It will be documented as soon as the coding is done.

8.4 JOB INITIATION

JOB INITIATION enables authorized users to generate and produce a variety of ILS notices and listings.

AVAILABLE INFORMATION

1. Overview of Job Initiation
2. Step By Step of Job Initiation
3. Special Features of Job Initiation

For further information, select the number for the appropriate discussion.

8.4.1 JI Overview

JOB INITIATION allows authorized users to generate and produce a variety of ILS notices and listings. E.g., users may print overdue notices, a list of current patrons, and other ILS reports. Users must identify the job they want to initiate and the production parameters by which it is to be produced (i.e., number of copies, time to start running the job, etc.).

8.4.2 JI Step By Step

JOB INITIATION currently permits authorized users to initiate 7 jobs. They are identified by their mnemonic abbreviation and index # as follows:

INDEX#	MNE	DESCRIPTION
1	CNA	COURTESY NOTICE--ALTERNATIVE
2	CNE	COURTESY NOTICE--EXTENDED LOAN
3	CNI	COURTESY NOTICE--INITIAL
4	CNO	COURTESY NOTICE--OVERDUE BORROWER
5	CNR	COURTESY NOTICE--RESERVES
6	PLW	PATRON LIST WEEKLY
7	PRI	REPORT PRINTER

Users may use 4 selection options to identify the job to be initiated.They are

MNE - MNEMONIC FOR JOB TITLE
INDEX# - NUMBER IN LIST FOR SELECTED JOB
FORWARD - DISPLAY NEXT SET OF JOB TITLES
BACK - DISPLAY PREVIOUS SET OF JOB TITLES

NOTE: Since the step by step procedures for this activity hold true for all

7 jobs, they are discussed generically.

JOB INITIATION requires the user to do two things:

1) Generate a most current version of the records to be used for this job.
2) Produce the job by having it print out on some output device.

For more information, select the number for the desired discussion.

8.4.3 JI Special Features

USE OF THE | KEY
In JOB INITIATION, the user may enter | whenever all the default settings are set correctly. ILS will immediately move the cursor past all the prompts and default settings on the screen and will immediately call up the second screen into view. If only some settings are correctly set, press return until the cursor reaches the incorrect value, and then enter the correction. If there are intermitent correct and incorrect values, the user must press return and enter the corrections until the last incorrect value has been corrected. At this point, the user may now enter | to quickly move through the rest of the prompts.

USE OF THE UP ARROW (↑) KEY
The up arrow key (↑) may be used in JOB INITIATION to travel backwards through the sequence of prompts, to return to and correct an entry. The user will have to re-enter the data for the prompts through which the up arrow key has past, as these data have been erased in the process of moving back up.

DISPLAY BEFORE SELECTION
IN JOB INITIATION jobs may only be identified by their index number, after they have been displayed in a list. ILS can only recognize the index number after it has first appeared on the screen.

TRUNCATED MNEMONIC IDENTIFICATION
In JOB INITIATION jobs may be identified by either a full or partial mnemonic identification. If a user enters e.g. CN, the system will list all jobs which begin with a CN mnemonic. From there, the user may then select the job by its full mnemonic title or its index number.

NOTE: The only way ILS will immediately begin initiating a job is if the user enters an exact mnemonic title.

REPORT PRINTER
Report Printer is used to print out jobs on an output device. Typically, a user will first want to generate a newest version of the job and then produce a print-out of it. However, if the user wishes a second copy of a job without first updating the version, user may use Report Printer directly. Selecting Report Printer directly, will cause ILS to print out the job exactly as it was printed the last time the job was run.

8.5 JOB QUEUE

JOB QUEUE allows authorized users to check on the status of batch jobs submitted to the system for processing. In ILS these batch jobs primarily produce printed reports such as overdue (courtesy) notices and patron lists.

AVAILABLE INFORMATION

1. JQ Overview

2. JQ Step by Step

For more information, enter one of the numbers above.

8.5.1 JQ Overview

JOB QUEUE enables the authorized user to see the "line up" of jobs which are in some stage of being processed. By identifying a job with a unique title, the user can find out where his or her job stands in relation to other jobs which are also "in the works".

8.5.2 JQ Step by Step

To view jobs in JOB QUEUE, enter /JQ in response to the ILS prompt COMMAND. ILS will respond with the following sample display:

JOB	NAME/ DESCRIPTION	USER	MNE	STATUS	PR/ INT	SUBMITTED/ START AFTER	STARTED/ STOPPED	PRINTER/ FORM
1	JOB1	SES	CNI	C	5	11/20/80 9:32 AM	9:34 AM	
	COURTESY NOTICE--INITIAL				I	11/20/80 9:32 AM	9:34 AM	
2	JOB2	SYS	PRI	C	5	11/20/80 9:35 AM	9:38 AM	1
	REPORT PRINTER					11/20/80 9:35 AM	9:38 AM	WWL1

8.6 SYSTEM ACTIVITY

SYSTEM ACTIVITY monitors the status of all ILS terminals and the volume of circulation activity.

AVAILABLE INFORMATION

1. Overview of System Activity
2. Step by Step of System Activity
3. Special Features of System Activity

For further information select the number for the appropriate discussion.

8.6.1 SA Overview

SYSTEM ACTIVITY provides statistics on the cumulative number of check ins and check outs which have occurred on the current day. It also displays the number of both administrative and circulation terminals which are currently logged in, as well as the number of inactive terminals which are not currently logged in.

8.6.2 SA Step By Step

To view SYSTEM ACTIVITY, enter /SA in response to the ILS prompt COMMAND. ILS will respond by displaying the following:

```
DATE: (the current date)          TIME: (the current time)
      e.g., 11/14/80                    e.g., 9:50

ADMINISTRATIVE TERMINALS: 12*     CIRCULATION TERMINALS: 6*
INACTIVE TERMINALS: 6             NOTE: * Refers to only those terminals
                                        currently logged on.

      CHECK OUT:  23              CHECK IN: 12     RENEW:  1
      ILL:                        MAIL OUT: 3
```

ILS will display the total number of transactions for each of the above activities which have occurred thus far on the current day.

8.6.3 SA Special Features

Although SYSTEM ACTIVITY can provide the user with current statistics with respect to circulation activity and the number of terminals currently logged onto the system, the user should still refer to JOB QUEUE for fuller picture as to what is happening within ILS.

8.7 SYSTEM PARAMETERS

SYSTEM PARAMETERS is used to edit various settings which control some of the processing functions of the ILS.

AVAILABLE INFORMATION

1. Overview of System Parameters
2. Step By Step of System Parameters
3. Special Features of System Parameters

For further information, select the number for the appropriate discussion.

8.7.1 SP Overview

In SYSTEM PARAMETERS, authorized users may either activate or inhibit the operation of certain ILS features, such as the Cart System and the Verify option. This function also permits authorized users to change the priority of certain background filer programs so that they will process data at either a faster or slower rate, thus providing the user with a way of modulating the background load on the system, which in turns affects overall response time. This function also sets the maximum number of citations which can be printed at a public printer.

8.7.2 SP Step By Step

To edit in SYSTEM PARAMETERS, enter /SP in response to the ILS prompt COMMAND:

ILS will respond by displaying a screen of prompts, each of which is explained below:

SEARCH PRINT LIMIT: 25/ This parameter limits the number of a hits which may be printed on a public use line printer, when searching the on-line catalog.

VERIFY ON/OFF: ON This parameter activates the Verify opti so that the name of both items and patrons may be displayed for the user to read during each transaction.

PRIORITY HANG AMOUNT: 2 This parameter specifies the minimum number of seconds which must elapse before the high priority background filer will "look" to see if there is something to do.

NON-PRIORITY HANG AMOUNT: 1 This parameter specifies the minimum number of seconds which must elapse before the low priority background filer will "look" to see if there is something to do.

JOB QUEUE HANG AMOUNT: This parameter specifies the minimum number of seconds

which must elapse before the high priority background filer will "look" in the job queue to see if there is a job waiting to be processed.

NUMBER OF BACKGROUND JOBS: 1 This parameter specifies the maximum number of jobs which are allowed to run at the same time. The system administrator may wish to change this parameter at the end of the business day to permit a greater volume of overnight processing.

CART SYSTEM: YES This parameter either permits or inhibits the operation of the Cart System, so that users may keep track of items which are in the library, but not on the shelves.

YES = CART SYSTEM will operate in conjunction with CHECK IN.

NO = CART SYSTEM will not operate in conjunction with CHECK IN.

8.7.3 SP Special Features

There are no special features for SYSTEM PARAMETERS as of November 24, 1980.

8.8 USER DELETE

USER DELETE deletes the user from the ILS system.

AVAILABLE INFORMATION

1. Overview of User Delete
2. Step By Step of User Delete
3. Special Features of User Delete

For further information, select the number for the appropriate discussion.

8.8.1 UD Overview

USER DELETE is used whenever a user is to be denied access to the ILS system. The system administrator, or some other authorized user, must make the deletion

8.8.2 UD Step By Step

To delete a user in USER DELETE, enter UD in response to the ILS prompt COMMAND:

ILS will reply:

USER ID: A ? will cause the following message to appear:

ENTER THE ID OF THE USER TO BE DELETED.

The user id which is used in response to the system prompt ENTER YOUR USER I.D. should be entered. If ILS does not recognize the id it will reply NO SUCH USER. The user will be given another chance to enter the correct id.

If ILS does recognize the id it will reply ARE YOU SURE? To cancel the deletion enter N and ILS will respond NO DELETION. To complete the deletion enter Y and ILS will respond DELETED!!

8.8.3 UD Special Features

There are no special features for USER DELETE as of November 24, 1980.

8.9 USER ADD/EDIT

USER ADD/EDIT is used whenever a new user is granted access to ILS. This procedure "identifies" the user to ILS and determines what areas of the system the user is allowed to access. This procedure also sets the user's experience level to either display or not display the range of options available to the user at any point in the system.

AVAILABLE INFORMATION

1. Overview of User Add/Edit

2. Step by Step Procedures of User Add/Edit

3. Special Features of User Add/Edit

For more information, enter the number for that discussion, or press T to travel to the top of this discussion.

8.9.1 US Overview

USER ADD/EDIT is used whenever a new user is granted access to ILS. This procedure "identifies" the user to ILS and determines what areas of the system the user is allowed to access. This procedure also sets the user's experience level to either display or not display the range of options available to the user at any point in ILS.

8.9.2 US Step By Step

To admit a new user to the ILS system, the authorized user must set the parameters of the User Profile as follows:

SYSTEM ID: Identifies a user of ILS uniquely from all other users, and is typically the user's initials (e.g., SES)

NAME: The full name of the new user is entered, last name, first name. (e.g. Selander, Sandy E.)

PASSWORD: The new user should select a short word or set of initials that are meaningful to be remembered each time they access ILS. Nick names, or spouse initials are perhaps most easily remembered.

EXPERIENCE LEVEL: Enter either ON or OFF. ON will cause NO selection options to appear; OFF WILL cause them to appear after each ILS prompt.

AUTHORIZATION LEVEL: The current authorization levels are: SYS ADMIN for a System Administrator, or OTHER for all other staff users.

SUBSYSTEMS: Enter the 2-character abbreviation for each SUBSYSTEM the new user will be permitted to access.

GENERAL FUNCTIONS: Enter the 2-character abbreviation for each GENERAL FUNCTION the new user will be permitted to access.

ADMINISTRATIVE FUNCTIONS: Enter the 2-character abbreviation for each ADMINISTRATIVE FUNCTION the new user will be permitted to access.

CIRCULATION FUNCTIONS: Enter the 2-character abbreviation for each CIRCULATION FUNCTION the new user will be permitted to access.

REPORTS: Enter the 3- or 4-character abbreviation for each report (either video or printout) that the new user will be permitted to view.

8.9.3 US Special Features

Using the - Key in USER ADD/EDIT

In USER ADD/EDIT, users may forward through parameters that they do not wish to edit by pressing the carriage return successively. If the cursor should pass a desired parameter, however, the user may return up to that parameter by using the - key.

The - key will make the cursor return up the screen line by line until the cursor is placed beside the desired ILS prompt. The user may then enter any appropriate value at that point, and then either enter a / to get out of the activity (ILS will return to the Administrative Subsystem command level), or continue to press carriage return to travel down the screen.

8.10 VIEW REPORTS

VIEW REPORTS is used to view on-line activity reports for various activities with ILS.

AVAILABLE INFORMATION

1. Overview of View Reports
2. Step By Step of View Reports
3. Special Features of View Reports

For further information select the number for the appropriate discussion.

8.10.1 VR Overview

The VIEW REPORTS function allows authorized users to view online activity reports for various activities within ILS. Users may obtain an on-line display of circulation and database activities for a variety of time periods.

8.10.2 VR Step By Step

Enter /VR in response to COMMAND: to view an activity report. ILS will reply:

```
REPORT: (user enter ?)

VIDEO REPORT SELECTION OPTIONS

MNE          - MNEMONIC FOR JOB TITLE
INDEX#       - NUMBER IN LIST FOR SELECTED JOB
FORWARD      - DISPLAY NEXT SET OF JOB TITLES
BACK         - DISPLAY PREVIOUS SET OF JOB TITLES

INDEX#   MNE   DESCRIPTION
   1     CAD   CIRCULATION ACTIVITIES -- DAILY
   2     DAD   DATABASE ACTIVITIES -- DAILY

Enter: 1) to learn how to select a report, or
       2) to learn how to select the date
```

8.10.2.1 VR Select Report

The first step in VIEW REPORT requires the user to specify the report to be displayed on-line. The user should enter a ? to have the reports displayed. After perusing through the list of available reports, the user may choose a report by typing in either the mnemonic for the report, or its index#. ILS

will then ask the user to specify the date desired.

Enter F to read how to specify the date for the report.

8.10.2.2 VR SELECT DATE

The last step in VIEW REPORTS requires the user to specify the date of the report. The system will compile dates for which there is data and then prompt DATE:. The user will be able to scroll the dates up and down, by pressing either B or carriage return, to browse for the correc date.

After the user has selected the desired date, ILS will immediately display the report on-line. To display the same report for a different day enter F followe by the interval of days you wish to see next. For example, to see monthly report for 3 months in advance of the current month, enter F3. ILS will then display the report for the third month after the current month for which there are data.

8.10.3 VR Special Features

WORKING DAYS
In VIEW REPORTS, users should keep in mind that all reports are generated only for those days for which there are any data. If a user looks at a Friday report, and wants to go forward one more day, ILS will display the statistics for Monday if the library was closed for the weekend. Users who rely upon these statistics should realize that statistics are provided on the basis of working days, not calendar days, and take this into consideration when interpreting the statistics.

USE OF THE F# INSTRUCTION
VIEW REPORTS allows users to display activity reports for spaced intervals of time. The user may enter F and some number to forward to the next nth day for which a report exists. For example, if a user began looking at a daily report for March 10 and entered F10 and a return, ILS would next display the same daily activity report for March 20. Correspondingly, if a user was looking at a weekly activity report dated March 1, and entered F3, ILS would then display a report for the third week past March 1 for which there were data.

8.11 DOWN SYSTEM

8.11.1 DO Overview

DOWN SYSTEM provides a way for an authorized user to shut down the ILS system in a controlled manner when the computer hardware needs to be turned off or serviced. This function ends the transaction processing programs and sets the transaction and statistical files so they will be automatically restarted when ILS becomes available. Only system administrators should be authorized to use this function. An additional password is also required to run the DOWN SYSTEM

function; this password is part of the program itself and should be set when ILS is installed initially.

8.12 PATRON FILE DEFINITION

8.12.1 PATRON FILE DEFINITION

The PATRON FILE DEFINITION processes allow the library administrator to define the information to be collected when registering library patrons.

The following information is available for PATRON FILE DEFINITION:

1. P0 OVERVIEW
2. P2 STEP-BY-STEP
3. P2 OPTIONS

For further information, select the appropriate number above.

8.12.2 P2 Overview

The library administrator uses PATRON FILE DEFINITION to identify the information to be recorded for each library patron. Certain patron data elements or questions are required for ILS operation, but the staff may add additional questions to properly describe the library's own patrons. Using PATRON FILE DEFINITION features, the library staff may define sets of questions which describe particular patron types, and may indicate the order in which those questions are to be asked during patron registration.

8.12.3 P2 Step-by-Step

The PATRON FILE DEFINITION process occurs at the time ILS is installed, and consists of 4 steps. These steps require analysis of the ILS library's needs followed by definition of the patron data elements using the PATRON FILE DEFINITION procedures.

1. DETERMINE PATRON CATEGORIES - decide what kinds of patrons make up the library's clientele.
2. DETERMINE DATA ELEMENTS FOR EACH CATEGORY - decide what information is needed to describe patrons in each category.
3. ADD PATRON DATA ELEMENT - use this option to define the categories and data elements in ILS. (For more information, enter 3 below.)
4. EDIT QUESTION LIST - use this option to verify or change the order of questions asked for a given patron category. (For more information, enter 4 below.)

8.12.4 P2 Options

There are four options in PATRON FILE DEFINITION:

1. ADD PATRON DATA ELEMENT - to define an additional data element for a particular patron category.

2. EDIT PATRON DATA ELEMENT - to change the definition of an existing data element.

3. EDIT QUESTION LIST - to change the order or delete data element(s) for a particular patron category.

4. DISPLAY QUESTION LIST - to show the data elements or questions currently defined for a patron category, in the order in which they will be asked during patron registration.

For more information on any option, select the number above.

8.12.4.1 P2 Add patron data element

Adding a patron data element requires these steps:

1. IDENTIFY PATRON CATEGORY - enter the patron category to which this data element will belong. If the patron category has not previously been defined, it will be entered as a new category. A '?' will show the list of current categories.

   ENTER DATA ELEMENT NAME - enter the name of the patron question as it should appear during patron registration. If that data element has already been defined for another category, you will be given a chance to copy its definition. A '?' will show the list of data elements already defined for this patron category.

3. DEFINE DATA ELEMENT CHARACTERISTICS - answer a series of questions that tell how the element should be treated during patron registration.

Enter 3 for a detailed description of data element characteristics.

8.12.4.1.1 P2 Data element characteristics

The following questions will be asked after the data element name is entered:

ILS ASKS	USER SHOULD RESPOND
REQUIRED? (Y/N)	'Y'es if this data element must be provided for each patron registered in this category Carriage return or 'N'o if the data element may be skipped during registration

LIST OF VALUES Y/N? N/	'Y'es if there is a defined set of answers to this question (for example, a list of university departments) Carriage return or 'N'o if a valid answer to this question cannot be identified in advance.

The next 2 questions are asked only if the answer to LIST OF VALUES is YES

USE IN BAR CODE Y/N? N/	'Y'es if this information is to be part of each patron's bar code ID Carriage return or 'N' if not
USE EXISTING DICTIONARY Y/N? Y/	Carriage return or 'Y'es if a set of values has already been defined which is appropriate for this data element 'N'o to define a new set of values
SYNTAX CHECK Y/N?	'Y'es if the data element has a required format or minimum/maximum length

ILS ASKS	USER SHOULD RESPOND
DEFAULT ANSWER:	Enter the answer which will be true for most patrons in this category (if any) or Carriage Return if there is none
ERROR MESSAGE:	Enter the message to be displayed if an invalid answer is given to this question during patron registration

8.12.4.2 P2 Edit patron data element

To edit a patron data element, the user will follow these steps:

1. IDENTIFY PATRON CATEGORY - Enter the category to be edited.

2. IDENTIFY DATA ELEMENT - Enter the name of the specific data element to be edited.

3. VERIFY OR CHANGE DATA ELEMENT CHARACTERISTICS - ILS will display the current definition of the data element (required, list of values, etc) and the user may accept the definition displayed by entering carriage return or provide new information. Enter 3 to see a description of data element characteristics that may be added or edited.

8.12.4.3 P2 Edit question list

The user may edit the question list for a particular patron category in order to change the order of questions or to delete a given data element from the list. To use EDIT QUESTION LIST the user follows these steps:

1. IDENTIFY PATRON CATEGORY - Enter the patron category whose list of questions is to be edited.

2. VIEW QUESTION LIST - ILS will display the current question list for that category.

3. CHANGE ORDER - The question list will be shown in the order in which the data elements were defined. If the questions should be asked in a different order during patron registration, the user may alter order.

   DELETE DATA ELEMENT - If a question does not belong in the list at all, it may be deleted from this patron category.

8.12.4.3.1 P2 Display question list

ILS will display the data elements currently defined for a given category.

QUESTION #	DATA ELEMENT	NEXT ON NO RESPONSE
1	NAME	REQ
2	STREET ADDRESS	3
3	CITY	4
4	STATE	5
5	ZIP CODE	6
6	HOME PHONE	END

The data elements are listed in the order in which they will be asked during patron registration. NEXT ON NO RESPONSE shows which question will be asked next during patron registration if the answer to the current question is blank, or no response. If the current data element is required (an answer must be provided for each patron), this column shows REQ.

8.12.4.3.2 P2 Change question order

After the current question list has been displayed, the user may verify the list, change the order, or delete data elements.

ILS ASKS	USER SHOULD RESPOND
CORRECT Y/N? Y/	Carriage return or 'Y'es if the list is correct as displayed. 'N'o if it needs to be changed
CHANGE ORDER Y/N? N/	'Y'es if the basic order or NEXT ON NO RESPONSE needs to be changed Carriage return or 'N'o if the order is okay but elements need to be deleted

DELETE DATA ELEMENTS Y/N? 'Y'es if one or more elements must be deleted from this category. NOTE: Deleting elements may require a subsequent change in question order.

8.12.4.4 P2 Display question list

ILS will display the data elements currently defined for a given category.

QUESTION #	DATA ELEMENT	NEXT ON NO RESPONSE
1	NAME	REQ
2	STREET ADDRESS	3
3	CITY	4
4	STATE	5
5	ZIP CODE	6
6	HOME PHONE	END

The data elements are listed in the order in which they will be asked during patron registration. NEXT ON NO RESPONSE shows which question will be asked next during patron registration if the answer to the current question is blank, or no response. If the current data element is required (an answer must be provided for each patron), this column shows REQ.

9 GENERAL INFORMATION

9.1 GENERAL CONCEPTS

The following GENERAL CONCEPTS are those which the user needs to know to work in the Integrated Library System. They are:

1. the DISPLAY (D) command - displaying the full record of an entry
2. the FORWARD (F) command - forwarding through Item and Patron Lists
3. the BACK UP (B) command - backing up through tem and Patron Lists
4. the COMBINE (:) command - combining two instructions into one step
5. the TRAVEL (/) command - exiting out of a subsystem and into another or going to another activity within a subsystem
6. Item and Patron Lists - viewing item and patron records in ILS
7. VIPS statement - vol/issue/part/suppl item characteristics

9.1.1 The DISPLAY Command

BACKGROUND
All indices in ILS are organized into a list-like structure. To access any patron or item record in ILS the user must first do a search and have ILS display all known entries which match the search request. ILS will display up to 5 entries at a time. If there are more than 5 entries (which will mean some entries will be on the next screen) users may scan all entries using the F or B command. (At this point users may, if they desire, press F once to read about FORWARD, and press F again to read about BACKUP. From there, you can return to this paragraph by pressing B once or twice).

The DISPLAY (D) command is used to display the full record of an entry so that the user can be sure that it is the desired entry.

Example: A patron search for J. Jones might yield 6 matches.
ILS would display:

```
ID
1   JONES, J.
2   JONES, JACK
3   JONES, JAMES
4   JONES, JIM
5   JONES, JOHN
```

and on the second screen:

```
6   JONES, JOHN R.
```

REMEMBER: The user must press F to view the entries on the next screen to be sure that the correct entry is chosen. To make certain that the correct patron

is chosen the user must view the full patron record to verify which J.JONES is the right patron. By pressing D followed by the entry's ID number, ILS will display for the user the full patron record of the entry. The same procedure is followed if the user wants to display a full item record in the MBF. In the above example, the user would have to view the full patron record for all 6 JONES entries, since the correct patron could have been any one of the 6 entries retrieved.

9.1.2 The FORWARD Command

The FORWARD (F) command is used whenever ILS finds more than 5 entries while searching any ILS index. It displays for the user the next set of 5 entries, and can be pressed repeatedly for as many groups of 5 entries as there are. The user need only press F to have the next set of entries displayed. ILS will reply "NO MORE ITEM MATCHES" or "NO MORE NAME MATCHES" when the last set of entries is displayed on the screen.

FOR EXAMPLE: In the previous discussion of the DISPLAY command (press B to view that discussion if you desire), the user would have to press F to have displayed the 6th JONES entry.

If you desire, press G to get to a discussion of the F key. To return to this current discussion press G again.

9.1.3 The BACKUP Command

The BACKUP (B) command is used whenever users want to return to a previous screen of entries which has already been displayed once. If users scan through a list of matches using the FORWARD command, the BACKUP command may subsequently be used to get back through the list in reverse order. The user may press B as many times as necessary to get back up to the top of the list of found entries.

FOR EXAMPLE: In the previous discussion of the DISPLAY command (press B twice if you want to see that text) the user would have to press B once to get from the second screen back to the first. Users should keep in mind that they can only choose, or display the full record of, those entries which currently appear on the screen. They can only, for example, select from items 1 through 5 if the first screen is displayed. They must use either the F or the B command to get to the screen of entries that contains the exact entry whose record they wish to display or choose.

Press G if you want a discussion of the B key. Press G again to get back here.

9.1.4 The COMBINE Command

The COMBINE (:) key links commands and the search key used to retrieve entries. It combines two separate steps into one by linking the first and second parts of an instruction together. Users will save time by using this option. FOR EXAMPLE: If a user wanted to CHECK OUT an item, either one of these two procedures could be followed:

WITHOUT COMBINE:	WITH COMBINE:
ILS asks for COMMAND:	ILS asks for COMMAND:
User enters CO (return)	User enters CO:SMITH (return)
ILS asks PATRON:	ILS begins displaying Smith entries
User enters SMITH	
ILS begins displaying Smith entries	

NOTE*The = key is used to retrieve item or patron entries faster, by typing the id option, =, and then the first few search key characters (e.g. for Anderson as an author or as a patron type AU=AND or PA=AND). The = key is used only to link id options and search keys; the : key links commands and search keys.

9.1.5 The TRAVEL Command

The TRAVEL command (/) is used to get from one area to another within ILS. It can take the user to either different activities within a given subsystem, (e.g. from CHECK IN to PATRON STATUS) or across subsystems (e.g. from CHECK OUT to HELP for CHECK OUT). It can also be used to take users back to wherever it was they were before they traveled to where they are now. The following scenarios illustrate the use of the TRAVEL command:

CASE 1 TRAVELING FORWARD CONTINUOUSLY
A user logs onto ILS and wants to go to CHECK OUT. The user enters CO in response to the ILS prompt COMMAND. ILS takes the user to CHECK OUT and prompts for PATRON:. After the user has completed CHECK OUT, a patron asks for the correct time. The user enters /TD and ILS takes the user to TIME AND DATE. Next the user receives a returned item and wants to go to CHECK IN. The user then types in /CI and ILS begins the CHECK IN process by prompting for ITEM:.

CASE 2 TRAVELING BACK TO WHERE YOU JUST WERE
A user is in the middle of a CHECK OUT and becomes confused over what to do next. By entering a /HE, ILS will take the user to HELP for the activity that was in process at the time. After the user reads HELP for CHECK OUT, entering a / will take the user back to CHECK OUT to continue in that activity.

NOTE: Since the complete transaction key was not pressed when the user went to HELP for CHECK OUT, once the user returns back to CHECK OUT the transaction must be started over from the beginning since it was never entered into ILS.

9.1.6 Working with Item and Patron Lists

All indices in ILS are organized into a list-like structure. To access any patron or item record in ILS the user must first do a search and have ILS display all known entries which match the search request. ILS will display up to 5 entries at a time. If there are more than 5 entries (which will mean some some entries will be on the next screen) users may scan all entries using the FORWARD (F) or BACKWARD (B) command. The DISPLAY (D) command may also be used to display the full record of an entry to verify that it is the one. (At this point the user may press T and select a detailed discussion of these commands. The user may then FORWARD back into this discussion.)

EXAMPLE: The user has asked to see all patron matches to the search key PA=JON
ILS would respond by displaying:

INDEX#	TYPE	NAME	TITLE	* The user may select an entry
1	CIVILIAN	JONAS,JOHN	DR.	* by typing in either its name
2	FACULTY	JONATHAN, SAM	MR.	* or index number(on the left)
3	STUDENT	JONES, ARTHUR	MR.	**********
4	STAFF	JONES, BETTY	MS.	
5	MILITARY	JONES, ROGER	DR.	

and on the second screen:

6	CIVILIAN	JONES, THOMAS	Mr.

REMEMBER: The user must press F to view the entries on the next screen to be sure that the correct entry is chosen. To make certain that the correct patron is chosen the user must view the full patron record to verify which J.JONES is the right patron. By pressing D followed by the entry's number, ILS will display for the user the full patron record of the entry. The same procedure is followed if the user wants to display a full item record in the Master Bibliographic File (MBF). In the above example, the user would have to view the full patron record for all 6 JONES entries, since the correct patron could have been any one of the 6 entries retrieved.

9.1.7 VIPS (Vol/Issue/Part/Supplement)

The VIPS statement is essential for properly identifying a specific item which is part of a larger group of items (e.g. one issue of a serial or one volume of a set of volumes). Any ILS activity which calls for a specific item to be identified (e.g. CHECK OUT, RENEW, ITEM STATUS etc.) will require that the VIP information about the item be specified before ILS can act upon the user's request.

9.2 FUNCTION KEYS

Some terminals are equipped with what is known as function keys. These keys provide for quick entry of frequently used ILS commands. For example, a user could use a function key to display all the options available at any point by pressing the f1 key. This would be faster than having to enter a ? and a carriage return.

Other special function keys may be set to substitute for several characters having to be typed, thereby minimizing the chance of keying errors as well as saving time. All instructions which can be entered by special function keys, may also be entered using the REGULAR KEYBOARD of a CRT terminal. There are, in effect, two ways to enter any instruction; one with the special function key and one without. Function keys for ILS are currently set up as listed below. For more information about each, enter the number for that key:

1. ? key=option display
2. - key=go up
3. F key=go FORWARD
4. B key=go BACKWARDS
5. HELP key=HELP text
6. PREVIOUS PATRON
7. PREVIOUS ITEM
8. / key=exit a function

9.2.1 The ? Function Key

The ? function key displays all possible options that a user may select at any point in ILS. It is used instead of pressing a ? and then pressing a carriage return. The ? function saves a little time by eliminating the need to press return, and is offered primarily as a convenience key. On a Hewlett-Packard 2645A terminal the ? function key is marked f1.

EXAMPLE: A user is trying to identify a patron. ILS prompts with PATRON: However, the user does not know what to do next. Pressing f1 or ? and a return will cause ILS to display:

```
PATRON IDENTIFICATION OPTIONS:

   pid#  -  PATRON ID#
   name  -  PATRON NAME FOR FIND
   DP    -  FIND LIBRARY DEPARTMENT ID
   PR    -  PATRON REGISTRATION
```

```
**********************************
*                                *
* the user is shown what the     *
* options are and may proceed    *
* from this point forward.       *
*                                *
**********************************
```

9.2.2 The - Function Key

The - (circumflex or up arrow) is generally used in ILS to mean GO UP to the next level within a function, or to the top of the function the user is in currently. On a Hewlett Packard 2645A terminal this is the f2 key.

Example: A user, searching for a patron in PATRON STATUS, types in the wrong first letter of the patron's last name (e.g. the user typed in N instead of M). The user may enter a - and a return or press f2 to GO UP to the prompt PATRON:.

NOTE: This special function key takes on additional meaning in CHECK OUT. In CHECK OUT the f2 or - key is used to instruct ILS to complete the transaction

by "filing away" the information just entered. ILS will then display the prompt PATRON:. The user may now enter the next CHECK OUT transaction or travel to any other activity in ILS.

9.2.3 The F Function Key

When scanning entries retrieved in ILS (see Lists in General Concepts) or when proceeding through HELP text, users may need to search through the list or branch to additional HELP discussion. The F or FORWARD command was designed to enable the user to go on to view the next set of 5 entries or the next HELP discussion. On a Hewlett-Packard 2645A terminal this is set as the f3 key.

EXAMPLE: A user, searching for patron John Jones, has retrieved the following entries by entering PA = JONES:

```
1)  Jones, Alfred E.
2)  Jones, Edward J.
3)  Jones, J. R.
4)  Jones, Jim
5)  Jones, John R.

and on the second screen:
6)  Jones, John T.
```

```
*******************************************
* The user should enter F and return or f3 *
* to see the second set of entries. In all *
* cases where it seems the correct entry   *
* is the last one displayed, use FORWARD   *
* to display the next screen to be sure    *
* the correct entry is chosen              *
*******************************************
```

9.2.4 The B Function Key

The BACK UP (B) key or f4 key is used to bring back on the screen data which was already seen once, which the user wishes to see again. When viewing entries during an ILS search, the user may have to go back and look over again an entry which might be the correct one. Entering a B and a return, or pressing the f4 key enables the user to back up through a list of entries or through a HELP discussion. (At this point the user may press G to go to a further discussion of the B command in CS General Concepts. Pressing G at that point will get the user back to this discussion.)

9.2.5 THE HELP FUNCTION KEY

The HELP (/HE) key has been designed to provide the user with a rapid means of obtaining assistance while performing any activity in ILS. If the user is in any Circulation Subsystem activity and becomes confused as to what to do next, typing a /HE and a return or the f5 key will cause ILS to immediately take the the user to the HELP discussion for that activity.

EXAMPLE: A user in CHECK OUT tries to identify an item in ILS, and forgets what options can be used to get to the item record. When ILS prompts with ITEM: the user may at this point type either /HE and return, or press the ? key. ILS will take the user to HELP text of Check Out, where he can find information on how to check out an item (including information on how to identify an item).

For Hewlett-Packard 2645A terminals, the /HE function key is f5

(For more information on the special functions keys and their locations, see CS Special Functions Keys.)

9.2.6 THE PREVIOUS PATRON FUNCTION KEY

The f6 function key is the PREVIOUS PATRON key. At any time when you have identified a patron to the system, the patron's name is stored and may be retrieved with the f6 key.

For example, if you have been checking out items to a patron and s/he wants to check his/her PATRON STATUS, you enter /PS to move to Patron Status. ILS will prompt: PATRON: Here you may press the f6 key instead of using the barcode to identify the patron.

Press F for help with the PREVIOUS ITEM (f7) function key.

Press T for more general information on function keys.

9.2.7 THE PREVIOUS ITEM FUNCTION KEY

The f7 function key is the PREVIOUS ITEM key. At any time when you have identified an item to the system, the item's name is stored and may be retrieved with the f7 key.

For example, if you have been checking the ITEM STATUS and would now like to RESERVE the item, enter /RV to move to RESERVE and at the prompt ITEM: you may press the f7 key instead of using the barcode to identify the item.

Press F for help with the EXIT A FUNCTION (f8) function key.

Press T for general information on FUNCTION KEYS.

9.2.8 The / Function Key

The / key is used to get back to the place in the ILS system where you were JUST BEFORE you arrived where you are now. If, for example, a user begins working in ILS by logging onto the system and goes to CHECK OUT, and then enters a / and a return, ILS will take the user back to the subsystem COMMAND level. If, however, the user goes from (e.g.) logging onto the system, to CHECK OUT, and then to CHECK IN, entering the / key will take the user back to CHECK OUT, which is where the user was just prior to going to CHECK IN.

[illegible] ILS remembers only one previous function. If the user goes from [illegible] to RENEW and then from RENEW into CHECK IN, the user has passed through 2 functions. If the user uses the / to go back to RENEW from CHECK IN

this is going back one function. Now if the user used the / again, ILS will return not to CHECK OUT, but will go to the subsystem COMMAND level instead. ILS only remembers one previous function; using the / twice in succession will cause ILS to revert back to the subsystem command level.

9.3 IDENTIFY ITEM

9.3.1 Identify Item

IDENTIFYING ITEMS WITH THE BARCODE SCANNER
Scanning the barcode is the fastest way to complete any transaction in ILS. Using the barcode wand eliminates the need for having to type in lengthy patron data, item data and the transaction symbols (e.g. /CO or /CI). By wanding over a coded version of these same data, ILS users will not experience the problems associated with miskeying this important information.
To identify an item using the barcode scanner, the user must first be sure that ILS is prompting the user with ITEM. At this point the user must put the point of the wand on the barcode label, and move the point of the wand over the pattern of black vertical lines. It does not matter if the wand moves from the left to right side or vice versa. Sometimes it helps if the wand is held directly over the item, instead of at a slant the way one would hold a pen. It is not necessary to scratch the barcode label. A light smooth stroke is all that is needed. Once ILS has recognized the item, it will respond by beeping once. This is to say, "I recognize this item!"

IDENTIFYING ITEMS WITHOUT A BARCODE SCANNER
It is sometimes the case that users either cannot or do not want to use the barcode wand. Under these circumstances users may instead access the ILS Master Bibliographic File through alternate options. In response to the prompt ITEM, enter ? and a carriage return. ILS will display 8 access options and an additional option which affixes short messages to an item record. They are:

(NOTE: ONCE YOU'RE DONE READING AN ITEM IDENTIFICATION OPTION
ENTER A 'T' AND A RETURN TO GET BACK TO THIS DISCUSSION)

1. IID#= Item Identification #
2. AU = Author
3. CA = Call Number
4. IS = ISSN/ISBN
5. LC #= Library of Congress #
6. TK = Title Key
7. AT = Author/Title Key
8. SE = Series
9. MI = Message (for item just entered)

9.3.2 Access by Item Identification Number

Identifying items by their ITEM IDENTIFICATION NUMBER is one way to access an item in the ILS system. The IID# is the alpha-numeric equivalent to the pattern of vertical black lines which make up the bar code and is found on the barcode label. It can be up to 10 characters long.

To access by the item identification number, enter the key "IID#" in response to the ILS prompt ITEM. ILS will then ask for the IID# and the user should enter the symbols as they appear on the item's barcode label. If a user chooses this option, it is essential that the characters be entered exactly as they appear. Any discrepancies in the spacing of the characters or typos will yield a wrong match or no match. The user may combine these steps into one step by entering e.g., IID#=0 $$ 1 90 4 in response to the prompt ITEM.

EXAMPLE: ILS prompts ITEM: ILS prompts ITEM:

USER types IID# OR USER replies IID#=0 $# 1 90 4
ILS asks for the IID#
USER enters 0 $# 1 90 4

9.3.3 Access by Author

Accessing an item by the AUTHOR is a popular access option. The ILS system will accept either a full author surname or a partial surname. This is done to afford the user the greatest amount of flexibility to view either an individual or range of entries:

SAMPLE: AU=ANDERSEN ILS will display all entries with ANDERSEN as author, without regard to which ANDERSEN. The user may select the desired item by its item number. If there are more than 5 entries the user may scan through them by pressing F to FORWARD through the list or B to BACKUP.

ID	TITLE AND AUTHOR
1	The Silver Skates by Andersen, Hans Christian
2	The Biography of by Andersen, Sandy E.

DISPLAYING THE FULL ENTRY

If the user is unsure about an entry being the correct entry the D command (DISPLAY) can be invoked to display the full record of this item, to verify that it is the correct entry. The D command is particularly useful when the truncated title string gives either little or ambiguous information or is otherwise not fully meaningful to the user. If the correct record cannot be found using this access option, the user may select another search key or quit entirely.

9.3.4 Access by Call Number

Located in most instances on the spine or some other visible part of an item, the CALL NUMBER is perhaps the most efficient, and popular way of gaining access to the record of a specific item. Although various call numbering schemes are used by libraries all over the world, (Dewey, Library of Congress, and the National Library of Medicine's being commonly used schemes), they each require that a unique number be assigned to each piece in the collection. The call number can be as long as the collection requires.

To access by call number the user must type in CA in response to the ILS prompt ITEM. ILS will reply with ENTER THE FULL OR PARTIAL CALL NUMBER. Then the user can enter the call number desired. If instead the user wishes to combine these two steps the user may enter, e.g., CA=QA76.15 in response to the ILS prompt ITEM. This may save some time. If the user wishes to see a range of entries beginning with the same call number ILS will display 5 entries at a time on the screen.The user may press F to FORWARD or B to go BACKWARDS through the list. To see the full record of an item enter D and the item's ID number.

9.3.5 Access by ISSN or ISBN

The ISSN and ISBN are numeric conventions which have been established to standardize the identities of both serials and monographs respectively. They are heavily used in the acquisitions process by publishers and libraries alike as they afford a succinct means of specifying a desired item. The numbers are a code which identifies both the publisher and the specific item.

To access by either the ISSN or ISBN enter IS in response to the ILS prompt ITEM. ILS will respond with ENTER THE FULL OR PARTIAL ISSN/ISBN. The user must then enter in the value. The user may instead combine these two steps into one by typing, e.g., IS=0700223738 in response to the ILS prompt ITEM. ILS will retrieve and then display on the screen all items which match. If the user wants a specific item, care must be exercised to enter the value exactly. If the user wishes to see a range of entries beginning with the same numbers then only a partial ISSN or ISBN need be entered.

```
SAMPLE: ILS prompts ITEM                          ILS prompts ITEM
        USER replies IS            OR             USER replies IS=0700223738
        ILS says ENTER THE FULL...
        USER enters 0700223738
```

ILS will then search the ISSN/ISBN index to find all possible matches, and will display them on the screen. If there are more than 5 matches ILS will display the first 5 and say THERE'S MORE. The user may browse through the matches by typing F for FORWARD or B for BACKWARDS. If the correct entry is found, the user must type the ID # of the correct match. If the user wants to see the full record for any entry, enter D and that entry's ID #.

9.3.6 Access by LC Card Number

A LIBRARY OF CONGRESS CARD NUMBER is assigned to each item cataloged by the Library of Congress. This number is used by libraries to order printed catalog cards from the Library of Congress. The number is usually one of the cataloging elements included in publishers' Cataloging In Publication (CIP) data. It is typically composed of 2 characters followed by a hyphen and 3 to 6 additional numbers.

To access by the LC # the user must type in LC in response to the ILS prompt ITEM. ILS will then respond with ENTER THE FULL OR PARTIAL LC #. The user must then type in the LC #. It is possible to combine these 2 steps into one by entering, e.g., LC=79-123456 in response to the ILS prompt ITEM. ILS will then search the LC # index to find appropriate matches. (If the entire LC # was entered there will be only one match; if a partial LC # was entered there may be several matches.) The user may browse through the matches by pressing F to FORWARD and B to BACKUP. If the correct entry is found, enter the ID # for that entry. If the user is not sure that it is the correct record the full record may be called up by pressing D and the entry's ID #.

SAMPLE: ILS prompts ITEM
USER replies LC#
ILS says ENTER THE FULL...
USER enters 79-123456

OR

ILS prompts ITEM
USER enters LC=79-123456

9.3.7 Access by Title Key

Title access in the ILS system is almost the same as in the OCLC system. Users may type in a truncated search key composed of the first few characters of the first few significant words in the title. Articles and other stop listed words (e.g. a, an, the, and, United States) are ignored. The key 3.2,2.1 is used to match the first 3 characters of the first word, the first 2 characters of the second word, the first 2 characters of the third word, and the first character of the fourth word in the title.

To access by title key, the user must enter TK in response to the ILS prompt ITEM. ILS will respond with ENTER THE TITLE KEY IN FORMAT 3,2,2,1. (NOTE: you do not need to enter a complete 3,2,2,1 key and you need not enter the commas. These 2 steps may be combined by typing, e.g., TK=DORILMED. ILS will reply by searching for and displaying all entries which match the search key. If there are more than 5 matches the system will say THERE'S MORE and the user may browse through the entries by typing F for FORWARD or B for BACKWARDS. To be sure that you have the correct record, type D and the entry's ID #.

9.3.8 Access by Author/Title Key

The AUTHOR/TITLE key is a combination key used to sort out more quickly a desired record. Although the same words may be found in the titles of different works, it is likely that different authors may be associated with each title. In this case a 4,4 combination key of both author and title would yield a more precise retrieval than a 3,2,2,1 title key.

To access by author/title key the user must enter AT in response to the ILS prompt ITEM. ILS will respond with ENTER 1ST 4 CHARS OF AUTHOR'S LAST NAME & 1ST 4 CHARS OF TITLE IN FORMAT 4,4. The user must then enter the characters as prescribed. It is possible to combine these 2 steps by typing (e.g.) AT=ALLR,BODY for the entry Body Functions by Jon Allred. ILS will respond by searching for all author title combinations with these characters and display them in groups of 5 on the screen. If there are more than 5 entries ILS will say THERE'S MORE and the user can press RETURN to view them. To scan through the list press F for FORWARD and B for BACKWARD. To be sure that an entry is for the correct record the user may press D for DISPLAY and the ID number of the entry to see the full record of the entry.

9.3.9 Access by Series

Under the ILS system it is possible to access records in the Master

Bibliographic File by the SERIES heading. Catalogers and other library staff may find this access point particularly convenient if they have series which comprise many issues. These are most notable in the biomedical and physical sciences and in special libraries that contain the reports of their agency or corporation.

To access ILS via the series option the user must enter SE in response to the prompt ITEM. (NOTE: This item option should not be confused with the /SE command for Serials Check In which is another feature of the Circulation Subsystem and uses the SE command. Remember that the Serials Check In command requires a /SE to get out to that transaction activity, whereas accessing a record by series heading requires only SE in response to the ILS prompt ITEM.) ILS will reply with ENTER THE FULL OR PARTIAL SERIES. The user may then enter any or all words of the series heading that are known and ILS will search the series index to find a match. ILS will display all matches and if there are more than 5, the user may view them by entering F for FORWARD or B for BACKUP.

9.3.10 Message (Item Just Entered)

Immediately after a user has identified an item in the Circulation Subsystem, ILS allows for a short message to be entered.

9.4 IDENTIFY PATRON

Any and all ILS functions involving patron data require that the patron be accurately identified in the ILS. A patron may be identified by either wanding the barcode on his library card, or entering the equivalent barcode number or the patron's last name. (If the wand is not used, enter the patron's last name instead of the barcode number to avoid typing mistakes.)

PATRON IDENTIFICATION OPTIONS

NAME-This is the most common way to enter the patron data. Enter the full last name or enough characters of the last name to narrow the list down sufficiently to display the desired patron entry. If there are more than 5 matches, ILS will say (THERE'S MORE) and the user may then press F or B to view additional entries that match. If the 5th entry seems to be the correct one, press F to be sure that the 6th or 7th ones are not identical names. To see more information for a patron in the list, enter D followed by the index number beside the patron's name. For example, if you had a list like:

1 JONES, JOHN B.
2 JONES, JOHN D.
3 JONES, JOHN D.
4 JONES, JOHN F.
5 JONES, JOHN R.

and you wanted to display more information from John D. Jones' record to select the correct entry, you could enter D2 or D3 to view further information from the patron record to accurately identify the patron from the list.

Once you're sure that you've found the correct entry, enter the index # which appears in the first column in response to the prompt PATRON:.

PATRON ID #- The Patron ID # is equivalent to the bar code configuration which appears on each patron's library card. It is made up of numbers and other characters which are transformed into a pattern of thick and thin lines and spaces which together make a code to identify both items and patrons. A patron may be identified by this code; however, it is suggested that the staff use the wand or type in the patron name whenever possible, thereby minimizing the chance of a typing error.

PATRON REGISTRATION - If the patron is not already registered in the patron list, it will be necessary to enter his or her patron data into the system before any transaction can be recorded into ILS. Local ILS sites may devise their own procedures for gathering patron information, putting it into the system at some later time. For a fuller discussion of patron registration refer to the path PATRON REGISTRATION. Enter /PR to get to this discussion.

9.5 ILS SYSTEM GLOSSARY

The ILS System Glossary functions to provide users with an on line dictionary of key concepts and terminology used in ILS discussions. This glossary is accessible from any subsystem within the HELP System. Local ILS sites may wish to add additional vocabulary into the glossary, or redefine some of the definitions given. This may be done in Help Maintenance using the instructions E G (edit glossary) or A G (add to glossary). For a more detailed discussion of how to work with the glossary see section 3.5 of the Help Maintenance Manual Working in the Glossary.

To look up a term in the glossary, enter GL in response to the HELP prompt CHOICE >. ILS will reply ENTER THE TERM TO BE DEFINED. The glossary will accept either a full or truncated word. If there should be a match to more than one word, ILS will display all the words that match. The user may then select by id # the desired term. ILS will then display the definition for that term, and will ask the user for the next term to be defined. To return to HELP, enter a ^ (up arrow) and a return. ILS will redisplay the exact screen where you were.

9.6 PRINT BARCODE

The PRINT BARCODE procedure permits authorized users to print barcodes for items or patrons. Patrons may lose their card, which has the barcode on it or the barcode on an item may have been removed or become unreadable. The user may use PRINT BARCODE to produce barcode labels for items which have records in the Master Bibliographic File (MBF) or patrons already registered in the system.

AVAILABLE INFORMATION

1. Overview of Print Barcode
2. Step by Step Procedures for Print Barcode
3. Special Features for Print Barcode

Please enter the number of the type of information you desire:

9.6.1 PB Overview

The PRINT BARCODE procedure permits authorized users to print barcodes for items or patrons. Usually a barcode label will be produced for an item during the NEWLY CATALOGED ITEM procedure and a label will be produced for a patron during PATRON REGISTRATION. If a duplicate label is needed, PRINT BARCODE will produce it for items which have records in the Master Bibliographic File (MBF) or patrons already registered in the system.

PRINT BARCODE gives the user 3 alternatives:

I - Will print a defined item.

P - Will print a defined patron.

E - Will start batch printing.

For HELP on these choices enter 'F' and a RETURN.

9.6.2 PB Step by Step

The PRINT BARCODE option enables the user to:

1. Print Barcode Label for an Item (I) - Identify the item for which a barcode label is to be printed and store the data. These data may be stored for any length of time as determined locally.
2. Print Barcode Label for a Patron (P) - Identify the patron for whom a barcode label is to be printed and store the data. These data may be stored for any length of time as determined locally.
3. Batch Print Barcode Labels (B) - Using the stored data, produce barcode

labels on the printer [illegible] weeks after the data are entered.

Each alternative has its own [illegible]
For more HELP enter the number [illegible] RETURN to SPECIAL FEATURES:

9.6.2.1 PB Identify Items

To print a barcode label for an item, the user must identify that item in the Master Bibliographic File (MBF). The user may select any of the 8 access options below (or the message option which allows the user to affix a short message to the item record). For example:

ILS will prompt:	User enters:
ITEM:	TK=[title of the item (see number 6 below)]
OR	
ITEM:	CA=[call number of the item (see number 3 below)]

ILS will display the title chosen and the message, DATA IS STORED IN QUEUE. When the user asks ILS to print (alternative 3 of PRINT BARCODE), data stored in the queue will be printed on labels.

These are the options available for identifying an item in ILS:

1. IID#= Item Identification #
2. AU = Author
3. CA = Call Number
4. IS = ISSN/ISBN
5. LC #= Library of Congress #
6. TK = Title Key
7. AT = Author/Title Key
8. SE = Series
9. MI = Message (for item just entered)

For more HELP enter the number of the desired option.

9.6.2.2 Identify Item

Items may be identified in various ways, including:

* using a barcode reader
* by item identification number
* by author
* by call number
* by ISSN/ISBN
* by Library of Congres number
* by title key
* by author/title key
* by series

For a detailed description of procedures and options for identifying an item, see the section "Identify Item" in the chapter GENERAL INFORMATION.

9.6.2.3 PB Identify Patron

If the user enters (P)ATRON in response to CHOICE>

ILS will display:	User enters:
(B)ATCH OR (S)INGLE PATRON? S/	'S' or RETURN - ILS will prompt for PATRON: The user must then use the PATRON IDENTIFICATION options discussed below.
	OR
	'B' - ILS will print a list of names from the print queue in alphabetical order. The user may specify the first and final names on the list. ILS will print all names which fall between and include those names. If 'B' is chosen, ILS will follow the sequence on the next screen.

ILS will display:	User enters:
PRINT PATRON LABEL FROM NAME:	The first name to be printed, for example - Blair.
THROUGH NAME:	The final name to be printed, for example - Cohn.
(U)NPRINTED NAMES ONLY OR (A)LL NAMES:	'U' - Prints only the labels which have never been printed before in the alphabetic sequence from Blair through Cohn.
	'A' - Prints all labels in the alphabetic sequence from Blair through Cohn.

For more HELP with PATRON IDENTIFICATION OPTIONS press RETURN.

To produce a Barcode Label a patron must be accurately identified in the ILS. A patron may be identified with one of the three options discussed below.

PATRON IDENTIFICATION OPTIONS

NAME-This is the most common way to enter the patron data. Enter the full last name or enough characters of the last name to narrow the list down sufficiently to display the desired patron entry. If there are more than 5 matches, ILS will say (THERE'S MORE) and the user may then press F or B to view additional entries that match. If the 5th entry seems to be the correct one, press F to be sure that the 6th or 7th ones are not identical names. To see more information for a patron in the list, enter D followed by the index number beside the patron's name. For example, if you had a list like:

1 JONES, JOHN B.
2 JONES, JOHN D.
3 JONES, JOHN D.
4 JONES, JOHN F.
5 JONES, JOHN R.

and you wanted to display more information from John D. Jones' record to select the correct entry, you could enter D2 or D3 to view further information from the patron record to accurately identify the patron from the list.

Once you're sure that you've found the correct entry, enter the # which appears in the first column in response to the prompt PATRON:.

PATRON ID #- The Patron ID # is equivalent to the bar code configuration which appears on each patron's library card. It is made up of numbers and other characters which are transformed into a pattern of thick and thin lines and spaces which together make a code to identify both items and patrons. A patron may be identified by this code; however, it is suggested that the staff type in the patron NAME whenever possible, thereby minimizing the chance of an error.

PATRON REGISTRATION - If the patron is not already registered in the patron list, it will be necessary to enter patron data into the system before any transaction can be recorded into ILS. Local ILS sites may devise their own procedures for gathering patron information and putting it into the system at a later time. For a fuller discussion of patron registration refer to the path PATRON REGISTRATION.

9.6.2.4 PB Batch Print

The Batch Print choice of PRINT BARCODE allows the user to print Barcode Labels using data stored in the print queue. Printing may be done days or even weeks after data were stored. The data stored in the queue will remain there until removed by the local system administrator.

Batch Print has 3 options:

L - WILL PRINT ALL UNPRINTED LABELS - This option will cause the printer to produce barcodes from data stored in the print queue. The printer will only produce labels which HAVE NOT been printed before.

P - WILL PRINT ALL PRINTED LABELS - This option will cause the printer to produce barcodes from data stored in the print queue. The printer will only produce labels which HAVE been printed before.

A - WILL PRINT ALL ENTRIES - This option will cause the barcode printer to produce labels from all data stored in the print queue whether or not they have been printed before.

Now press 'T' to go back to STEP BY STEP PROCEDURES for PRINT BARCODE or press 'F' once and a RETURN twice to get to SPECIAL FEATURES.

9.6.3 PB Special Features

1. The print queue is a very important concept for an understanding of the PRINT BARCODE procedure. ANY INFORMATION entered using the Patron or Item alternatives will be stored in the print queue WHETHER OR NOT it is printed. When the user enters an item or patron in response to an ILS prompt for ITEM: or PATRON: the label information will be stored in the print queue. The label may be printed immediately but the information will remain in the print queue until removed by the local system administrator.

   In addition, each piece of label information in the print queue will be marked to indicate whether or not a label has been printed. It is this feature which allows the user to 'print all unprinted labels', 'print all printed labels' or 'print all entries' when using the BATCH PRINT alternative.

2. The barcode label printer must be turned ON before the user begins to print labels from the data stored in the queue. If it is OFF, ILS will prompt the user to CHECK PRINTER POWER, but there is a chance that data could be lost if the user attempts to produce labels with the printer OFF.

9.7 PRINT TEMPORARY LABELS

PRINT TEMPORARY LABELS permits authorized users to produce temporary barcode labels using the barcode printer.

AVAILABLE INFORMATION

1. Overview of Print Temporary Labels
2. Step by Step Procedures for Print Temporary Labels
3. Special Features for Print Temporary Labels

Please enter the number of the type of information you desire:

9.7.1 PT Overview

PRINT TEMPORARY LABELS permits authorized users to produce temporary barcode labels using the barcode printer. Temporary labels would normally be used when a library is first converting its records to machine-readable form or if the library wishes to circulate an item before it is processed. A temporary label might also be used on a book obtained through inter-library loan.

A temporary label is a barcode label that contains only an identification number. The barcode printer will produce two copies of each label, one for the item and one for the item card.

Press 'F' and a RETURN to get to Step By Step procedures for PRINT TEMPORARY LABELS.

9.7.2 PT Step by Step

PRINT TEMPORARY LABEL should follow these steps:

ILS will prompt:	User enters:
	Nothing.
THE LAST TEMPORARY ITEM BARCODE # IS: 325	ILS will list the number of the last temporary label produced.
ENTER STARTING LABEL NUMBER: 326/	Press RETURN if this number is correct.

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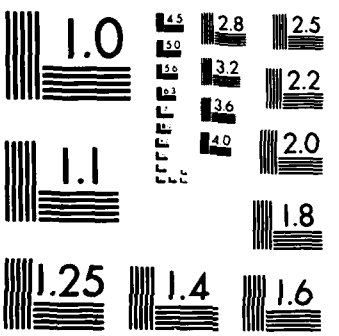

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HOW MANY LABELS:	Enter the number of labels you want.
... PRINTING ...	The requested labels will be produced.

9.7.3 PT Special Features

As of June 27, 1980 the are no Special Features for PRINT TEMPORARY LABELS.

9.8 DETAIL

DETAIL serves as a temporary override to the EXPERIENCE setting by reversing a user's experience level for the current session only. Although experienced users may prefer that ILS not display all the available options, other users may find the displays helpful. DETAIL permits users to reverse the EXPERIENCE setting for the current session only.

AVAILABLE INFORMATION

1. Overview of Detail

2. Step by Step Procedures for Deail

Please enter the number of the type of information you desire:

9.8.1 DE Overview

DETAIL requires users to choose between the ON and the OFF setting, each of which is explained below.

If you choose ON - ILS will display all options at each point in the session. If users are experienced (they usually DO NOT have the options displayed for them), choosing ON will mean that ILS WILL DISPLAY ALL options for the current session. The next time these users use ILS, the options will not be shown

If you choose OFF - ILS will not display options for each point in the session. If a user is an inexperienced user, (they usually DO have the options displayed for them) choosing OFF will mean that ILS WILL NOT DISPLAY ALL options for the current session. The next time these users use ILS the options will be shown.

NOTE: To permanently reverse a user's experience level see EXPERIENCE.

9.8.2 DE Step by Step

To temporarily change experience level the user may enter

/DE=ON OR /DE=OFF

in response to any ILS prompt. ILS will change the experience level for this session only and return the user to the prompt where he or she had just been.

It is also possible to change the experience setting in a two step process. The user enters DE in response to the ILS prompt COMMAND: and then enters either ON or OFF as desired.

9.9 EXPERIENCE

EXPERIENCE identifies a user as either an experienced or inexperienced user. A user's experience level will determine whether or not all ILS options are displayed on the screen.

AVAILABLE INFORMATION

1. Overview of Experience

2. Step by Step Procedures for Experience

Please enter the number of the type of information you desire:

9.9.1 EX Overview

EXPERIENCE records each user's experience level using ILS. It is linked to the user's password and can only be set by the system administrator. There are two EXPERIENCE settings:

1.EXPERIENCE=OFF - This option is for users who are not experienced with ILS. With EXPERIENCE=OFF ILS will automatically list the selection options available at every point in ILS.

2.EXPERIENCE=ON - This option is for users who are experienced with ILS. With EXPERIENCE=ON ILS will not automatically list the selection options available at every point in ILS.

NOTE: Experienced users may still view ILS options at any point by entering a ? followed by a return. Should it ever become necessary to temporarily reverse a user's experience level, DETAIL can be used. For more information on DETAIL enter /DE.

9.9.2 EX Step by Step

To set a user's experience level the authorized user may enter

/EX=ON OR /EX=OFF

in response to any ILS prompt. ILS will change the experience level and return the user to the previous prompt.

It is also possible to change the experience setting in a two step process. The user enters EX in response to the ILS prompt COMMAND: and then enters either ON or OFF as appropriate.

9.10 TIME AND DATE

THE TIME & DATE option tells the user the correct time and current date as it is known within the ILS computer. The computer has a built in clock and calendar, and it can supply users with the correct time and date very easily.

To find out either the correct time or date, the user must enter TD or /TD (the / is only necessary if you are in the middle of some other function) ILS will respond by displaying the current date and time. The display will remain on the screen for several seconds; then ILS will take the user back to the last transaction before going to TIME & DATE.

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