

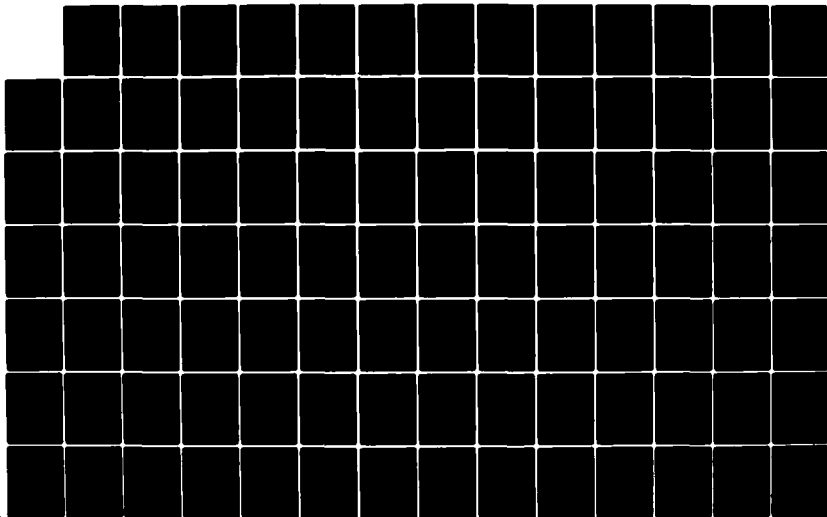
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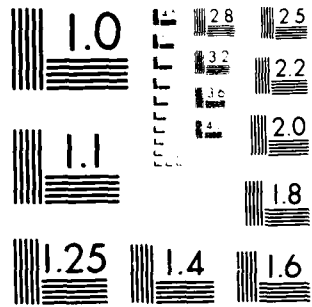
THE INTEGRATED LIBRARY SYSTEM USER MANUALS -  
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CENTER FOR BIOMEDICAL COMMUNICATIONS BET.. 21 JUL 80  
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<p>This document is a hardcopy listing of two online user manuals for the Integrated Library System (ILS) developed at the Lister Hill National Center for Biomedical Communications of the National Library of Medicine. The two sections comprising this document are:</p> <p style="text-align: center;">Section I. The Circulation Subsystem Section II. General Functions</p> <p>The ILS is an ongoing effort of the Lister Hill Center directed toward the development of a totally integrated, minicomputer-based, library automation system. ILS, Version 1.0 includes modules for creation and maintenance of the Master Bibliographic File (MBF), Circulation (Inventory) Control, Serials Check-in, and online Catalog Access. The MBF is fully MARC compatible and the Bibliographic Control Subsystem includes OCLC MARC tape processing. Subsystems in process or planned include Patron Interface to the online catalog, Acquisitions, Cataloging, Serials Control, and Network Access.</p>				
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INTEGRATED LIBRARY SYSTEM  
USER MANUAL

THE CIRCULATION SYSTEM

July 21, 1980



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Integrated Library System  
User Manual

THE CIRCULATION SUBSYSTEM

JUL 21, 1980

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1 CS INTRODUCTION

1.1 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 or pieces 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:

1.1.1 CIRCULATION SUBSYSTEM OPTIONS

There are 15 different options in the CIRCULATION SUBSYSTEM (CS). They are:

- |                                  |  |
|----------------------------------|--|
| 1. CI = CHECK IN ITEMS           | 9. RI = RECEIPT FOR ITEMS CHECKED IN       |
| 2. CO = CHECK ITEMS OUT          | 10. RV = RESERVE (HOLD) ITEMS FOR PATRONS  |
| 3. IL = INTERLIBRARY LOAN        | 11. SH = SHELF (ITEMS USED WITHIN LIBRARY) |
| 4. ME = MESSAGES (PATRONS/ITEMS) | 12. SM = SNAG (TRY LOCATING MISSING ITEMS) |
| 5. MO = MAIL OUT ITEMS           | 13. SS = SET STATUS FOR ITEMS              |
| 6. PU = PULL ITEMS FROM SHELF    | 14. VE = VERIFY PATRON/ITEM INFORMATION    |
| 7. RC = RECALL ITEMS PREMATURELY | 15. GF = GENERAL FUNCTIONS                 |
| 8. RE = RENEW ITEMS OUT ON LOAN  |  |

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

1.1.2 CIRCULATION SUBSYSTEM OVERVIEW

The CIRCULATION SUBSYSTEM is composed of 15 circulation related options and 15 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

### 1.1.3 CIRCULATION 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 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 top paragraph.

#### 1.1.3.1 CS General Concepts

The following GENERAL CONCEPTS are those which the user needs to know to work in the Circulation Subsystem. 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 Item 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

### 1.1.3.2 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.

### 1.1.3.3 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 discussion press G again.

#### 1.1.3.4 the BACKUP command

The BACKUP (B) command is used whenever users want to return back to a previous screen of entries which have 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.

#### 1.1.3.5 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 a lot of 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:
IIS asks for COMMAND:	IIS ASKS FOR COMMAND:
User enters CO (return)	User enters CO:SMITH (return)
IIS asks PATRON:	IIS begins displaying Smith entries
User enters SMITH	
IIS 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.

#### 1.1.3.6 the TRAVEL command

The TRAVEL command (/) is used to get from one area to another within IIS. 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 that 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.

**1.1.3.7 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 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 correct 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 FA=JON  
ILS would respond by displaying:

INDEX#	TYPE	NAME	TITLE	
1	CIVILIAN	JONAS, JOHN	DR.	* The user may select an entry *
2	FACULTY	JONATHAN, SAM	MR.	* by typing in either its name *
3	STUDENT	JONES, ARTHUR	MR.	* or index number (on the left) *
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 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 5 JONES entries, since the correct patron could have been any one of the 5 entries retrieved.

1.1.3.8 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 VIPS information about the item be specified before ILS can act upon the user's request.

1.1.3.9 CS Introduction To Special Function Keys

Some terminals are equipped with what is known as special function keys or simply function keys. These special function keys provide for quick entry of frequently used ILS commands. For example, a user could use a function key to have displayed all the options available at any point in ILS. This would be faster than having to enter a ? and then 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 the HP 1645A terminal 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 to the top
- 3. F key=go FORWARD
- 4. B key=go BACKWARDS
- 5. END key=HELP cont
- 6. undefined
- 7. undefined
- 8. K key=exit a function
- 9. undefined

1.1.3.10 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 1645A 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.
*
*
*
*****

```



1.1.3.11 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 M instead of N). 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.

1.1.3.12 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:

1) Jones, Alfred E.	*****
2) Jones, Edward J.	" The user should enter F and return or f3 "
3) Jones, J. R.	" to see the second set of entries. In all "
4) Jones, Jim	" cases where it seems the correct entry "
5) Jones, John R.	" is the last one displayed, use FORWARD "
	" to display the next screen to be sure "
and on the second screen:	" the correct entry is chosen. "
6) Jones, John. T.	*****

1.1.3.13 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.)

1.1.3.14 THE /HE 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 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 F5 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.)

1.1.3.15 THE F6 FUNCTION KEY

AT THE PRESENT TIME THE F 6 KEY IS UNDEFINED

PRESS F TO CONTINUE FORWARD

OR

PRESS T TO GET TO THE TOP DISCUSSION

1.1.3.16 THE F7 FUNCTION KEY

AT THE PRESENT TIME THE F 7 KEY IS UNDEFINED

PRESS F TO GO FORWARD

OR

PRESS T TO GET TO THE TOP DISCUSSION

#### 1.1.3.17 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 (i.e.) 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.

REMEMBER: ILS remembers only one previous function. If the user goes from CHECK OUT to RENEW and then from RENEW into CHECK IN, the user has passed through 3 functions. If the user uses the / to go back to RENEW 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.

#### 1.1.4 SYSTEM GLOSSARY

The following is a glossary of terms that should aid the user in performing functions in any subsystem:

- item ..... Any individual piece that can be circulated or used within the library is referred to as an item. Items may range from a copy of a book to an anatomical model or a piece of hardware or equipment such as a calculator. The ILS Bibliographic structure is sufficiently flexible to "catalog" anything that the library may wish to own and circulate.
- user ..... A user is a staff member of the library such as a clerk at the circulation desk, or a reference librarian or a cataloger.

## 2 CHECK IN

### 2.1 INTRODUCTION

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:

#### 2.1.1 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 very busy. After an item has been checked in the patron is no longer responsible for the item.

#### 2.1.2 CI Step By Step

CHECK IN requires the user to do 2 things:

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 more HELP concerning either of these steps enter the number of that step and press RETURN.

### 2.1.3 Identify Item

#### IDENTIFYING ITEMS WITH THE BARCODE SCANNER

The barcode scanner 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 wandling over a coded version of this 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 little 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!" After a little practice with the wand users will feel more comfortable using it.

#### 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 # | 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 # |   |

#### 2.1.3.1 Access by Item Identification Number

Identifying items by their ITEM IDENTIFICATION NUMBER is one possible, yet uncommon way to access an item in the ILS system. The IID# is the alpha and numeric equivalent to the pattern of vertical black lines which make up the bar code and is found on the bar code 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 bar code 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 IID#=0 ## 1 90 4 in response to the prompt ITEM.

SAMPLE: ILS prompts ITEM:                    ILS prompts ITEM:  
          USER types IID#                    OR            USER replies IID#=0 ## 1 90 4

ILS asks for the IID#  
USER enters IID# value

#### 2.1.3.2 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=ANDERSON ILS will display all entries with ANDERSON as author, without regard to which ANDERSON. 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 Anderson, Hans Christianson
2	The Biography of by Anderson, 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.

#### 2.1.3.3 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 the more renown schemes) they each require that a unique number be assigned to each piece in the collection. The call number can be as long as is the collection requires. Sometimes thin items have long call numbers and thick items have short ones.

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 CA=2A76.15 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.

#### 2.1.3.4 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 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 correct. 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 #.

#### 2.1.3.5 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 1 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 # user must then type in the LC #. It is possible to combine these 2 steps into one by entering LC=79-23456 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		ILS prompts ITEM
	USER replies LC#	OR	USER enters LC=79-123456
	ILS says ENTER THE FULL ...		
	USER enters 79-123456		

#### 2.1.3.6 Access by Title Key

Title access in the ILS system is almost the same as what is done 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: if a title has fewer than 4 words enter commas consecutively to fill in the key.) These 2 steps may be combined by typing (e.g.) TK=DOR,IL,ME,D. 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 #.

#### 2.1.3.7 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.



#### 2.1.3.8 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.

#### 2.1.3.9 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.

#### 2.1.3.10 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.

#### 2.1.4 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 bar code label. If it is a temporary label the item must go directly to the cataloging department to be processed. If the item has NO BAR CODE 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 CHECK OUT

#### 3.1 INTRODUCTION

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:

##### 3.1.1 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 identify the item.

##### 3.1.2 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.

### 3.1 2.1 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 waving the bar code on their library card, or entering the equivalent bar code 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 C.
4 JONES, JOHN F.
5 JONES, JOHN R.

```

and you wanted to display more information from the patron's 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 their 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.

### 3.1.2.2 Identify Item

#### IDENTIFYING ITEMS WITH THE BARCODE SCANNER

The barcode scanner 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 wandling over a coded version of this 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 little 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!" After a little practice with the wand users will feel more comfortable using it.

#### 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 # | 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 # |   |

### 3.1.2.3 Access by Item Identification Number

Identifying items by their ITEM IDENTIFICATION NUMBER is one possible, yet uncommon way to access an item in the ILS system. The IID# is the alpha and numeric equivalent to the pattern of vertical black lines which make up the bar code and is found on the bar code 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 bar code 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 IID#0 ## 1 90 4 in response to the prompt ITEM.

```
SAMPLE: ILS prompts ITEM:          ILS prompts ITEM:
USER types IID#                     OR   USER replies IID#0 ## 1 90 4
      ILS asks for the IID#
      USER enters IID# value
```

#### 3.1.2.4 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=ANDERSON      ILS will display all entries with ANDERSON as
                        author, without regard to which ANDERSON. 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 Anderson, Hans Christiansen
2       The Biography of by Anderson, 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.

#### 3.1.2.5 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 the more renowned schemes) they each require that a unique number be assigned to each piece in the collection. The call number can be as long as is the collection requires. Sometimes thin items have long call numbers and thick items have short ones.

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 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.

### 3.1.2.6 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 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 correct. 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 #.

### 3.1.2.7 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 # user must then type in the LC #. It is possible to combine these 2 steps into one by entering 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 ILS prompts ITEM  
USER replies LC# OR USER enters LC=79-123456  
ILS says ENTER THE FULL...  
USER enters 79-123456

### 3.1.2.8 Access by Title Key

Title access in the ILS system is almost the same as what is done 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: if a title has fewer than 4 words enter commas consecutively to fill in the key.) These 2 steps may be combined by typing (e.g.) TK=DOR,ILL,NE.D. 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 #.

### 3.1.2.9 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.



#### 3.1.2.10 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.

#### 3.1.2.11 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.

#### 3.1.2.12 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 not been permanently filed away. The user must complete the transaction by pressing the - and a return or by pressing the f2 key in order to have ILS permanently file the transaction away.

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 check out this book after all) PRESS ABORT or the SPECIAL FUNCTION 3 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!!!

#### 3.1.3 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 such as Smith, Jones or Brown.
  
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 (a.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 (i.e. /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.

## 4 INTER-LIBRARY LOAN

### 4.1 INTRODUCTION

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 keep an accurate record of all Interlibrary Loan activity.

#### AVAILABLE INFORMATION

1. Overview of IL
2. Step by Step Procedures For IL
3. Special Features for IL

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

#### 4.1.1 IL Overview

HELP TEXT FOR THIS ACTIVITY IS IN PROCESS. FUTURE RELEASES OF ILS SOFTWARE WILL INCLUDE THIS MATERIAL.

LOCAL ILS SITES THAT WISH TO CREATE THEIR OWN HELP DISCUSSIONS ARE REFERRED TO THE ONLINE DOCUMENTATION IN ILS "HELP".

#### 4.1.2 IL Step By Step

HELP TEXT FOR THIS ACTIVITY IS IN PROCESS. FUTURE RELEASES OF ILS SOFTWARE WILL INCLUDE THIS MATERIAL.

LOCAL ILS SITES THAT WISH TO CREATE THEIR OWN HELP DISCUSSIONS ARE REFERRED TO THE ONLINE DOCUMENTATION IN ILS "HELP".

#### 4.1.3 IL Special Features

When using the ILL routine, users must remember to first create a temporary record for the item to be borrowed from another library. ILL 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.

=

1

## 5 MESSAGE

### 5.1 INTRODUCTION

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:

#### 5.1.1 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, a.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 attached is called up. These messages may be saved or deleted after being displayed.

#### 5.1.2 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 wanted 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 of the bar code. If the system is able to locate the patron's record, you will be prompted to retype the id number based on the found record (found from name). You may also retype a truncated version of the name for the same effect. The screen will then display 1> at the left margin. You may now enter the first line of the message. Two more lines may be added (when you see 2> and 3> ). Note that any messages already assigned to the patron are 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 #13 (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 wanted 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 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 b. 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 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 the !> appears at ft margin.
- g. Provide the appropriate letters for the author-title Key (first 4 characters of each, separated by comma). Next Key in the index numoun. Provide the message when !> 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 Sub-system. A message may be added when the !> appears at the left margin.

### 5.1.3 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 MAILOUT

### 6.1 INTRODUCTION

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:

#### 6.1.1 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.

#### 6.1.2 MO Step By Step

##### PU Special Features

1. 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.

#### 6.1.3 MO Special Features

As of June 23, 1980, there are no special features for the MAILOUT function.

## 7 PULL

### 7.1 INTRODUCTION

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 for Pull

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

#### 7.1.1 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.

#### 7.1.2 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 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 data 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.

#### 7.1.3 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 3.

## 3 RECALL

### 3.1 INTRODUCTION

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:

#### 3.1.1 RC Overview

RECALL is used to generate a written notice to a patron, asking that an item currently checked out to them be returned to the library. The ILS Patron Record keeps track of the patron's address and other identifying information, and this information is, therefore, typed out onto the recall notice automatically. The user is required to enter only item identification data.

#### 3.1.2 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.

#### 3.1.2.1 Identify Item

##### IDENTIFYING ITEMS WITH THE BARCODE SCANNER

The barcode scanner 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 handing over a coded version of this 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 little 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!" After a little practice with the wand users will feel more comfortable using it.

#### 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 # | 6. TX = 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 # |   |

#### 8.1.2.2 Access by Item Identification Number

Identifying items by their ITEM IDENTIFICATION NUMBER is one possible, yet uncommon way to access an item in the ILS system. The IID# is the alpha and numeric equivalent to the pattern of vertical black lines which make up the bar code and is found on the bar code 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 bar code 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 IID#=0 #\* 1 90 4 in response to the prompt ITEM.

SAMPLE: ILS prompts ITEM:		ILS prompts ITEM:
USER types IID#	OR	USER replies IID#=0 #* 1 90 4
ILS asks for the IID#		
USER enters IID# value		

#### 8.1.2.3 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: AQ=ANDERSON IIS will display all entries with ANDERSON as author. Without regard to author ANDERSON, 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 BACKWARD.

```
ID      TITLE AND AUTHOR
1      The Silver Skates by Anderson, Hans Christoferson
2      The Biography of ... by Anderson, Emily 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.

#### 3.1.2.4 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 the more renown schemes) they each require that a unique number be assigned to each piece in the collection. The call number can be as long as is the collection requires. Sometimes thin items have long call numbers and thick items have short ones.

To access by call number the user must type in CA in response to the IIS prompt ITEM. IIS 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 CA=QA76 '5 in response to the IIS prompt ITEM. This may save some time. If the user wishes to see a range of entries beginning with the same call number IIS 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.

#### 3.1.2.5 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 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 correct. 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
         ILS says ENTER THE FULL...                   USER replies IS=0700223738
         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 #.

#### 8.1.2.6 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 #.user must then type in the LC #. It is possible to combine these 2 steps into one by entering 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                                ILS prompts ITEM
         USER replies LC#                               OR
         ILS says ENTER THE FULL...                   USER enters LC=79-123456
         USER enters 79-123456
```

#### 8.1.2.7 Access by Title Key

Title access in the ILS system is almost the same as what is done 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: if a title has fewer than 4 words enter commas consecutively to fill in the key.) These 2 steps may be combined by typing (e.g.) TK=DCR,IL,ME,D. 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 #.

#### 8.1.2.8 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 C 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.

#### 8.1.2.9 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.

#### 8.1.2.10 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.

#### 8.1.3 RC Special Features

Local ILS sites may wish to design their own forms for recall notices, as there is no current ILS standard for the design of these forms.

## 9 RENEW

### 9.1 INTRODUCTION

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:

#### 9.1.1 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:

- 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 their local policies into RENEW.

#### 9.1.2 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 into 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

#### 9.1.2.1 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 bar code on their library card, or entering the equivalent bar code 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 L.  
4 JONES, JOHN F.  
5 JONES, JOHN R.
```

and you wanted to display more information from the patron's 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 their 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.

#### 9.1.2.2 Identify Item

##### IDENTIFYING ITEMS WITH THE BARCODE SCANNER

The barcode scanner 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 wandling over a coded version of this 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 little 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!" After a little practice with the wand users will feel more comfortable using it.

##### 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 'I' AND A RETURN TO GET BACK TO THIS DISCUSSION.)

- |                                 |   |
|---------------------------------|---|
| 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 # |   |

#### 9.1.2.3 Access by Item Identification Number

Identifying items by their ITEM IDENTIFICATION NUMBER is one possible, yet uncommon way to access an item in the ILS system. The IID# is the alpha and numeric equivalent to the pattern of vertical black lines which make up the bar code and is found on the bar code 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 bar code 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 IID#=0 \$\$ 1 90 4 in response to the prompt ITEM.

SAMPLE: ILS prompts ITEM: OR ILS prompts ITEM:  
USER types IID# USER replies IID#=0 \$\$ 1 90 4  
ILS asks for the IID#  
USER enters IID# value

#### 9.1.2.4 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=ANDERSON ILS will display all entries with ANDERSON as author, without regard to which ANDERSON. 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 Anderson, Hans Christianson
2	The Biography of by Anderson, 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.

#### 9.1.2.5 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 the more renowned schemes) they each require that a unique number be assigned to each piece in the collection. The call number can be as long as is the collection requires. Sometimes thin items have long call numbers and thick items have short ones.

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 CA=2A76.15 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.

#### 9.1.2.5 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 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 correct. 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 #.

#### 9.1.2.7 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 4 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 #. user must then type in the LC #. It is possible to combine these 2 steps into one

by entering 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		ILS prompts ITEM
	USER replies LC#	OR	USER enters LC-79-123456
	ILS says ENTER THE FULL...		
	USER enters 79-123456		

#### 9.1.2.8 Access by Title Key

Title access in the ILS system is almost the same as what is done 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: if a title has fewer than 4 words enter commas consecutively to fill in the key.) These 2 steps may be combined by typing (e.g.) TK=DOR,IL,ME,D. 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 #.

#### 9.1.2.9 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.

#### 9.1.2.10 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.

#### 9.1.2.11 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.

#### 9.1.2.12 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 1 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 rent 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!!!

### 9.1.3 RE Special Features

There are some special features in CHECK IN 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 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 hand the bar codes of the items instead. Before handing 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).

## 10 RECEIPT CHECK-IN

### 10.1 INTRODUCTION

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 PAYOFF-IN).

#### AVAILABLE INFORMATION

1. Overview of Receipt Check-In
2. Step by Step Procedures For Receipt Check-In
3. Special Features for Receipt Check-In

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

#### 10.1.1 RI Overview

RECEIPT CHECK IN is used whenever a patron specifies that a receipt be generated, itemizing what they have 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.

#### 10.1.2 RI Step By Step

In RI the user is required to:

1. IDENTIFY THE ITEM: Access ILS via any one of the available item identification options to display the desired record.
2. CREATE A RECEIPT: THIS ROUTINE IS NOT CURRENTLY OPERATIONAL IT IS ANTICIPATED THAT FUTURE RELEASES OF THE ILS WILL INCLUDE THIS MODULE



### 10.1.2.1 Identify Item

#### IDENTIFYING ITEMS WITH THE BARCODE WAND

The barcode scanner is the fastest way to enter a transaction in ILS. Using the Barcode wand eliminates the need to type in lengthy patron data, item data and the number of the item. By wandling over a coded version of the barcode, users will not experience the problems associated with always having to type in the number. To identify an item using the Barcode wand, the user must first be sure that ILS is prompting the user with ITEM. The user must put the point of the wand on the barcode label. At 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. It helps if the wand is held directly over the item instead of at an angle. The way one would hold a pen. It is not necessary to scratch the barcode label. A little 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." After a little practice with the wand users will feel more comfortable using it.

#### 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 # | 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 # |   |

### 10.1.2.2 Access by Item Identification Number

Identifying items by their ITEM IDENTIFICATION NUMBER is one possible, yet uncommon way to access an item in the ILS system. The IID# is the alpha and numeric equivalent to the pattern of vertical black lines which make up the bar code and is found on the bar code label. It can be up to 40 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 bar code 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 IID#=0 \*\* 1 90 4 in response to the prompt ITEM.

SAMPLE ILS prompts ITEM:	OR	ILS prompts ITEM:
USER types IID#		USER replies IID#=0 ** 1 90 4

ILS asks for the IID#  
USER enters IID# value

#### 10.1.2.3 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=ANDERSON ILS will display all entries with ANDERSON as author, without regard to which ANDERSON. 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 Anderson, Hans Christianson
2	The Biography of by Anderson, 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.

#### 10.1.2.4 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 the more renown schemes) they each require that a unique number be assigned to each piece in the collection. The call number can be as long as is the collection requires. Sometimes thin items have long call numbers and thick items have short ones.

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 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.

#### 10.1.2.5 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 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 correct. 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 #.

#### 10.1.2.6 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 # user must then type in the LC #. It is possible to combine these 2 steps into one by entering 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 ILS prompts ITEM  
USER replies IC# OR USER enters IC#77-123456  
ILS says ENTER THE FULL...  
USER enters 77-123456

#### 10.1.2.7 Access by Title Key

Title access in the ILS system is almost the same as what is done in the ULS 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. If a title has fewer than 4 words enter commas consecutively to fill in the key. These 2 steps may be combined by typing (e.g.) TK+DCR ELEMENT. 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 #.

#### 10.1.2.8 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.

#### 10.1.2.9 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.

#### 10.1.2.10 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.

#### 10.1.2.11 RI Create Receipt

HELP TEXT FOR THIS ACTIVITY IS IN PROCESS. FUTURE RELEASES OF ILS SOFTWARE WILL INCLUDE THIS MATERIAL.

LOCAL ILS SITES THAT WISH TO CREATE THEIR OWN HELP DISCUSSIONS ARE REFERRED TO THE ONLINE DOCUMENTATION IN ILS "HELP".

#### 10.1.3 RI Special Features

HELP TEXT FOR THIS ACTIVITY IS IN PROCESS. FUTURE RELEASES OF ILS SOFTWARE WILL INCLUDE THIS MATERIAL.

LOCAL ILS SITES THAT WISH TO CREATE THEIR OWN HELP DISCUSSIONS ARE REFERRED TO THE ONLINE DOCUMENTATION IN ILS "HELP".

## 11 RESERVE

### 11.1 INTRODUCTION

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:

#### 11.1.1 RV Overview

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.

RESERVE enables users to either add, edit, or delete requests to reserve items. RESERVE can modify entries in either an item queue or a 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.

#### 11.1.2 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 'ITEM QUEUE OR 'PATRON 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.

#### 11.1.2.1 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.

#### 11.1.2.2 RV Editing 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:
      2)IID# 4)CA 6)LC 8)AT 10)MI
      3)AU 5)IS 7)TK 9)SE

      Edit the ITEM QUEUE (cont'd)
COPY: Enter the number of the item to
      be reserved.

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 Salander 1 5-25-80
2 Duncan 2 6-30-80 ...etc.

PRIORITY: 1/The user may edit priority
of the reserve request(default=1).

ROUTING INFORMATION: A free text message
may be entered and edited. The
user must REPLACE a string of
characters WITH a new string of
characters.

We will send this book to Windery.
REPLACE: Wi WITH Bi
We will send this book to Bindery

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 !.

Edit the PATRON QUEUE (cont'd)
# TITLE AUTHOR COPY RESERVE EXPIRES
1 Cats Smith 1 7-4-80

WHICH ITEM?: ILS will list all items
reserved by the patron.

POSITION IN QUEUE: Enter the number of
the item to be edited.

COPY: The user must enter the correct
copy number.

DATE NOT NEEDED AFTER: Enter the new
date not needed after.

ROUTING INFORMATION: A free text
message may be entered and
edited. The user must REPLACE
a string of characters WITH a
new string of characters.

Route to Registrar first.
REPLACE: first With last
Route to Registrar last.

```

### 11.1.2.3 RV Deleting 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
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:
2)IID# 4)CA 6)LC 8)AT 10)MI
3)AU 5)IS 7)TK 9)SE

```

```

To delete 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 !.

```



```

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 and number all items
                                     *reserved by the patron.)
*
WHICH PATRON?: ILS displays the queue *WHICH ITEM?: Enter the number or the
of existing patrons and the user    * item.
must enter the number of the entry*
to be edited. ILS will display the*
following table:                    *
*
$ Patron Copy Not Needed After*
1 Salander 1 5-25-80 *
2 Duncan 2 6-30-80 ...etc.*
*
Delete the ITEM QUEUE (cont'd)      *Delete the PATRON QUEUE (cont'd)
*
OK TO DELETE? NO// Enter a 'Y' and a *OK TO DELETE? NO// Enter a 'Y' and a
RETURN to delete. Enter RETURN to * RETURN to delete. Enter RETURN
leave the record unchanged.         * to leave the record unchanged.
*
DELETED (or) NOT DELETED            *DELETED (or) NOT DELETED
*
ILS will return to the prompt OPTION: * ILS will return to the prompt OPTION:
*

```

#### 11.1.2.4 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 bar code on their library card, or entering the equivalent bar code 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 the patron's 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 their 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.

#### 11.1.2.5 Access by Item Identification Number

Identifying items by their ITEM IDENTIFICATION NUMBER is one possible, yet uncommon way to access an item in the ILS system. The IID# is the alpha and numeric equivalent to the pattern of vertical black lines which make up the bar code and is found on the bar code 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 bar code 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 IID#=0 ## 1 90 4 in response to the prompt ITEM.

SAMPLE: ILS prompts ITEM:		ILS prompts ITEM:
USER types IID#	OR	USER replies IID#=0 ## 1 90 4
ILS asks for the IID#		
USER enters IID# value		

#### 11.1.2.6 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=ANDERSON	ILS will display all entries with ANDERSON as author, without regard to which ANDERSON. 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 Anderson, Hans Christianson
2	The Biography of by Anderson, 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.

#### 11.1.2.7 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 the more renowned schemes) they each require that a unique number be assigned to each piece in the collection. The call number can be as long as is the collection requires. Sometimes thin items have long call numbers and thick items have short ones.

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 CA-RATE 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.

#### 11.1.2.8 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 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 correct. 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 #.

#### 11.1.2.9 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 # user must then type in the LC #. It is possible to combine these 2 steps into one by entering 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                      ILS prompts ITEM
         USER replies LC#                      OR          USER enters LC=79-123456
         ILS says ENTER THE FULL...
         USER enters 79-123456
```

#### 11.1.2.10 Access by Title Key

Title access in the ILS system is almost the same as what is done 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: If a title has fewer than 4 words enter commas consecutively to fill in the key.) These 2 steps may be combined by typing (e.g.) TK=DOR,IL,ME,D. 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 #.

#### 11.1.2.11 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.

#### 11.1.2.12 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.

#### 11.1.2.13 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.

#### 11.1.3 RV Special Features

There are no special features required for RESERVE at this time.

## 12 SHELF

### 12.1 INTRODUCTION

The SHELF procedure is used by library staff to enter statistical 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

#### 12.1.1 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.

#### 12.1.2 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 'H' and a RETURN

### 12.1.2.1 Identify Item

#### IDENTIFYING ITEMS WITH THE BARCODE SCANNER

The barcode scanner 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. CDD or LI). By waving over a coded version of this 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 little 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." After a little practice with the wand users will feel more comfortable using it.

#### 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 9 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 # | 5. 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 # |   |

### 12.1.2.2 Access by Item Identification Number

Identifying items by their ITEM IDENTIFICATION NUMBER is one possible, yet uncommon way to access an item in the ILS system. The IID# is the alpha and numeric equivalent to the pattern of vertical black lines which make up the bar code and is found on the bar code 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 bar code 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 types will yield a



wrong match or no match. The user may combine these steps into one step by entering IID#=0 \$# 1 90 4 in response to the prompt ITEM.

SAMPLE: ILS prompts ITEM: USER types IID# ILS asks for the IID# USER enters IID# value OR ILS prompts ITEM: USER replies IID#=0 \$# 1 90 4

### 12.1.2.3 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=ANDERSON ILS will display all entries with ANDERSON as author, without regard to which ANDERSON. 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 Anderson, Hans Christianson
2	The Biography of by Anderson, 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.

### 12.1.2.4 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 the more renown schemes) they each require that a unique number be assigned to each piece in the collection. The call number can be as long as is the collection requires. Sometimes thin items have long call numbers and thick items have short ones.

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 CA=2A76.15 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.

#### 12.1.2.5 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 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 correct. 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 #.

#### 12.1.2.6 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 #. user must then type in the LC #. It is possible to combine these 2 steps into one by entering LC=79-23456 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 ILS prompts ITEM  
USER replies LC# OR USER enters LC=79-123456  
ILS says ENTER THE FULL...  
USER enters 79-123456

#### 12.1.2.7 Access by Title Key

Title access in the ILS system is almost the same as what is done 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: if a title has fewer than 4 words enter commas consecutively to fill in the key.) These 2 steps may be combined by typing (e.g.) TK=DOR,IL,ME,D. 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 #.

#### 12.1.2.8 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.

#### 12.1.2.9 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.

#### 12.1.2.10 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.

#### 12.1.3 SH Special Features

As of July 8, 1980 there are no known special features for SHELF.

13 SNAG

13.1 INTRODUCTION

The SNAG procedure permits authorized users to set the status of an item to 'Snag' and to produce a series of search slips. SNAG means that an item is not on the shelf but it has not been declared lost.

AVAILABLE INFORMATION

1. Overview of Snag
2. Step by Step Procedures For Snag
3. Special Features for Snag

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

13.1.1 SN Overview

SNAG is used when an item is not in its place on the shelf but cannot yet be declared LOST. When an item is 'snagged' its status (as read in ITEM STATUS) will be set to 'SNAG' and a search slip will be produced. ILS will produce search slips according to Circulation Parameters set by the system administrator. Slips may be produced at regular intervals for any length of time set locally. When ILS has produced all of the slips called for, for example - one slip per week for three weeks, the status will automatically be changed to LOST.

To SNAG an item the user needs to identify the exact item. For Step By Step instructions go FORWARD.

13.1.2 SN Step By Step

The SNAG procedure requires only that the user identify the item. ILS will prompt for ITEM: When a unique item has been identified ILS will list it and prompt for another item. The user may continue to enter items or enter a '/' and a RETURN to leave the SNAG procedure and return to a previous activity.

SNAG assumes that the user does not have the item in hand. ILS gives the user 9 Item Identification Options:

- |                                 |   |
|---------------------------------|---|
| 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 #  |   |

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

### 13.1.2.1 Access by Item Identification Number

Identifying items by their ITEM IDENTIFICATION NUMBER is one possible, yet uncommon way to access an item in the ILS system. The IID# is the alpha and numeric equivalent to the pattern of vertical black lines which make up the bar code and is found on the bar code 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 bar code 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 IID#=0 ## 1 90 4 in response to the prompt ITEM.

```
SAMPLE: ILS prompts ITEM:           ILS prompts ITEM:
         USER types IID#           OR   USER replies IID#=0 ## 1 90 4
         ILS asks for the IID#
         USER enters IID# value
```

### 13.1.2.2 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=ANDERSON   ILS will display all entries with ANDERSON as
                    author, without regard to which ANDERSON. 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 Anderson, Hans Christianson
2       The Biography of by Anderson, 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.

#### 13.1.2.3 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 the more renowned schemes) they each require that a unique number be assigned to each piece in the collection. The call number can be as long as is the collection requires. Sometimes thin items have long call numbers and thick items have short ones.

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 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.

#### 13.1.2.4 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 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 correct. 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 #.

### 13.1.2.5 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 3 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 # user must then type in the LC #. It is possible to combine these 2 steps into one by entering 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	OR	ILS prompts ITEM
	USER replies LC#		USER enters LC=79-123456
	ILS says ENTER THE FULL...		
	USER enters 79-123456		

### 13.1.2.6 Access by Title Key

Title access in the ILS system is almost the same as what is done 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 3.1.2.1 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 3.1.2.1 (NOTE: if a title has fewer than 4 words enter commas consecutively to fill in the key). These 2 steps may be combined by typing (e.g.) TK=DOR,ILL,ME,D. 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 #.



#### 13.1.2.7 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 !ST 4 CHARS OF AUTHOR'S LAST NAME & !ST 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.

#### 13.1.2.8 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 BACKWARD.

#### 13.1.2.9 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.

#### 13.1.3 SM Special Features

As of July 8, 1980 there are no known special features for SMAG.

## 14 SET STATUS

### 14.1 INTRODUCTION

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 what the current status of the item is.

#### AVAILABLE INFORMATION

1. Overview of Set Status
2. Step by Step Procedures for Set Status

Please enter the number of the information you desire:

#### 14.1.1 SS Overview

SET STATUS is a collection of 4 separate routines, which collectively serve to note the status of items thought to be lost or missing. SET STATUS modifies the status of an item in the Item Status Display. Although doing a CHECK OUT or a CHECK IN will cause the Item Status record to be automatically updated, users must call upon SET STATUS to update the Item Status record for lost or missing items.

SET STATUS may prove to be a useful means of keeping track of lost or missing items, by providing library management with statistics as well as advising acquisitions of possible reorders.

#### 14.1.2 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

For more HELP with any of these steps enter the number of that step and press RETURN.

#### 14.1.2.1 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 ? and a RETURN.

#### 14.1.2.2 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 any one of the item identification options.

For more HELP on item identification options press !.

#### 14.1.2.3 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 response to the ILS prompt FUNCTION:.  
To learn more about how to identify an item press !.

#### 14.1.2.4 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 them. This option 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. If the item had 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 `REASON FOR LOSS`. To learn more about how to identify an item press `?`.

#### 14.1.2.5 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 # |   |

#### 14.1.2.6 Access by Item Identification Number

Identifying items by their ITEM IDENTIFICATION NUMBER is one possible, yet uncommon way to access an item in the ILS system. The IID# is the alpha and numeric equivalent to the pattern of vertical black lines which make up the bar code and is found on the bar code 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 bar code 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 IID#=0 # 1 90 4 in response to the prompt ITEM.

SAMPLE: ILS prompts ITEM:		ILS prompts ITEM:
USER types IID#	OR	USER replies IID#=0 # 1 90 4
ILS asks for the IID#		
USER enters IID# value		

#### 14.1.2.7 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=ANDERSON ILS will display all entries with ANDERSON as author, without regard to which ANDERSON. 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 Anderson, Hans Christianson
2	The Biography of by Anderson, 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.

#### 14.1.2.8 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 the more renown schemes) they each require that a unique number be assigned to each piece in the collection. The call number can be as long as is the collection requires. Sometimes thin items have long call numbers and thick items have short ones.

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 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.

#### 14.1.2.9 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 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 correct. 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	OR	ILS prompts ITEM
USER replies IS		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 #.

#### 14.1.2.10 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 1 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 #.user must then type in the LC #. It is possible to combine these 2 steps into one by entering 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 OR ILS prompts ITEM  
USER replies LC# USER enters LC#79-123456  
ILS says ENTER THE FULL...  
USER enters 79-123456

#### 14.1.2.11 Access by Title Key

Title access in the ILS system is almost the same as what is done 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 character 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: if a title has fewer than 4 words enter commas consecutively to fill in the key.) These 2 steps may be combined by typing (e.g.) TK=DOR,IL,ME,D. 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 #

#### 14.1.2.12 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.

#### 14.1.2.13 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.

#### 14.1.2.14 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.



15 VERIFY

15.1 INTRODUCTION

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:

15.1.1 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 is much faster for the user and more efficient for ILS than VE=ON.

For Step By Step procedures for VERIFY enter 'F' and a RETURN.

15.1.2 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.

#### 15.1.3 VE Special Features

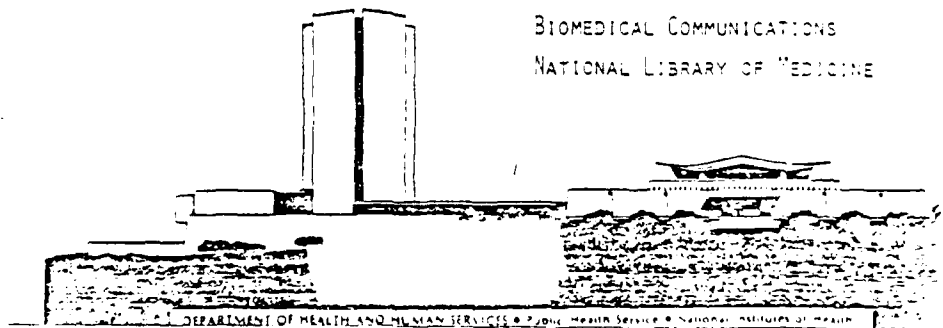
As of July 8, 1980 there are no known special features for VERIFY.

LISTER HILL CONTRACT REPORT 79-50-13  
JULY 21, 1980

THE INTEGRATED LIBRARY SYSTEM  
USER'S MANUALS  
CIRCULATION SUBSYSTEM AND GENERAL FUNCTIONS

LISTER HILL NATIONAL CENTER FOR BIOMEDICAL COMMUNICATIONS  
NATIONAL LIBRARY OF MEDICINE

A CONTRACT REPORT TO THE  
LISTER HILL NATIONAL CENTER FOR  
BIOMEDICAL COMMUNICATIONS  
NATIONAL LIBRARY OF MEDICINE



INTEGRATED LIBRARY SYSTEM  
USER MANUAL

GENERAL FUNCTIONS

July 21, 1980

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1 GF INTRODUCTION

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 the Circulation or Administrative subsystems. These functions are of general use and interest so they do not fit well into a single subsystem and therefore are generally available system wide (if the user profile specifies their availability).

- |                          |                           |
|--------------------------|---------------------------|
| 1. ADD ROUTING           | 9. PATRON ACTIVITY        |
| 2. DETAIL                | 10. PRINT BARCODE         |
| 3. EDIT ITEM             | 11. PATRON DELETE         |
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| 6. ITEM DELETE           | 14. PATRON STATUS         |
| 7. ITEM STATUS           | 15. TIME & DATE           |
| 8. NEWLY CATALOGED ITEM  |                           |

Select the desired option or go back to the Subsystem option list

AD-A135 922

THE INTEGRATED LIBRARY SYSTEM USER MANUALS -  
CIRCULATION SUBSYSTEMS AND G. (U) LISTER HILL NATIONAL  
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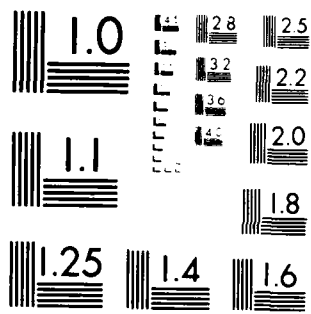
22

UNCLASSIFIED

F/G 5/2

NL

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

## 2 ADD ROUTING

### 2.1 INTRODUCTION

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:

#### 2.1.1 AR Overview

ADD ROUTING is used to add or delete patron names to routing slips used to circulate serials as they are checked in.

ADD ROUTING requires that the user supply:

1. The Item Identifier(s) - the code number for the individual item (a unique number for each piece) which ILS uses internally to identify the item(s) to be routed.
2. A Patron Identifier - the code number for the patron (a unique number for each patron) which ILS uses internally to identify the patron.

#### 2.1.2 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 'X' command to exit from Add Routing.

For more HELP concerning any of these steps enter the number of that step and then press <RETURN>.

#### 2.1.2.1 Identify Item

##### IDENTIFYING ITEMS WITH THE BARCODE SCANNER

The barcode scanner 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 wandling over a coded version of this 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 little 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!" After a little practice with the wand users will feel more comfortable using it.

##### 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 # | 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 # |   |

#### 2.1.2.2 Access by Item Identification Number

Identifying items by their ITEM IDENTIFICATION NUMBER is one possible, yet uncommon way to access an item in the ILS system. The IID# is the alpha and numeric equivalent to the pattern of vertical black lines which make up the bar code and is found on the bar code 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 bar code 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 IID#0 \*# 1 90 4 in response to the prompt ITEM.

SAMPLE: ILS prompts ITEM: ILS prompts ITEM:  
USER types IID# OR USER replies IID#0 \*# 1 90 4  
ILS asks for the IID#  
USER enters IID# value

#### 2.1.2.3 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=ANDERSON ILS will display all entries with ANDERSON as author, without regard to which ANDERSON. 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 Anderson, Hans Christianson
2	The Biography of by Anderson, 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.

#### 2.1.2.4 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 the more renowned schemes) they each require that a unique number be assigned to each piece in the collection. The call number can be as long as is the collection requires. Sometimes thin items have long call numbers and thick items have short ones.

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 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.

#### 2.1.2.5 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 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 correct. 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 #.

#### 2.1.2.6 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 #. user must then type in the LC #. It is possible to combine these 2 steps into one by entering 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 ILS prompts ITEM  
USER replies LC# OR USER enters LC=79-123456  
ILS says ENTER THE FULL...  
USER enters 79-123456

#### 2.1.2.7 Access by Title Key

Title access in the ILS system is almost the same as what is done 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: if a title has fewer than 4 words enter commas consecutively to fill in the key.) These 2 steps may be combined by typing (e.g.) TK=DOR,IL,ME,D. 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 #.

#### 2.1.2.8 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.

#### 2.1.2.9 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.

#### 2.1.2.10 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.

#### 2.1.2.11 AR Identification of Patron

Once the item has been identified, the user will want to identify the patron(s) connected with that item's routing slip. The computer will prompt the user with the serial ID and copy number, and say:

(P)ERMANENT OR (T)EMPORARY? TEMPORARY/

This concerns the status on the routing slip of the intended patron. There is no great difference between the two choices. With a temporary status, the patron acknowledges that he will not be on the routing slip forever, but his name will not be deleted from the routing slip until someone goes through the process necessary. The system will never delete a name from a routing slip without being told to do so. The user enters the desired status with either a 'P' or a 'T'.

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)  
<-> Go back to function (see AR Special Features)  
- <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.

#### 2.1.2.12 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 AR Exiting From Add Routing)

To review the patron identification options press 1, or  
(F) FORWARD to AR Delete Name, or  
(T) to go to the top discussion

#### 2.1.2.13 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 waving the bar code on their library card, or entering the equivalent bar code 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 B 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 the patron's 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 their 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.

#### 2.1.2.14 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 AR Exiting From Add Routing.)

#### 2.1.2.15 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 MIN RECORD ( s8) COPY# 1  
TEMPORARY OPTION: \_

- 1 MISS JANE BROWN
- 2 MR GEORGE CAREW
- 3 MJR 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:.

#### 2.1.2.16 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)FILE OR (N)NO 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)PERMANENT/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.

#### 2.1.3 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 beginning 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 they are 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; to change a list choice type C

### 3 DETAIL

#### 3.1 INTRODUCTION

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, their users may find the displays helpful. DETAIL permits users to reverse their experience level, for one time only, and gives them more flexibility using ILS.

##### AVAILABLE INFORMATION

1. Overview of Detail
2. Step by Step Procedures For Detail

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

##### 3.1.1 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 a user is an experienced user, (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 this user uses 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 this user uses ILS the options will be shown.

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

##### 3.1.2 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 previous prompt.

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 appropriate.

4 EDIT ITEM

4.1 INTRODUCTION

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:

4.1.1 EI Overview

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

The user must identify the item for which the record is to be edited. ILS will then allow the user to add to or delete from the cataloging data. ILS will then file the edited record in the MBF.

For Step By Step Procedures of EDIT ITEM press 'F' and RETURN to go forward.

4.1.2 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 the it unchanged.

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

#### 4.1.2.1 Identify Item

##### IDENTIFYING ITEMS WITH THE BARCODE SCANNER

The barcode scanner 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 waving over a coded version of this 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 little 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!" After a little practice with the wand users will feel more comfortable using it.

##### 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 'Y' AND A RETURN TO GET BACK TO THIS DISCUSSION!)

- |                                 |   |
|---------------------------------|---|
| 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. NI = Message (for item just entered) |
| 5. LC = Library of Congress #   |   |

#### 4.1.2.2 Access by Item Identification Number

Identifying items by their ITEM IDENTIFICATION NUMBER is one possible, yet uncommon way to access an item in the ILS system. The IID# is the alpha and numeric equivalent to the pattern of vertical black lines which make up the bar code and is found on the bar code 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 bar code 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 IID#0 \$# 1 90 4 in response to the prompt ITEM.



SAMPLE: ILS prompts ITEM:  
USER types IID#                   OR        ILS prompts ITEM:  
  USER replies IID#=0   \$#   : 90 4  
  ILS asks for the IID#  
  USER enters IID# value

#### 4.1.2.3 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=ANDERSON        ILS will display all entries with ANDERSON as author, without regard to which ANDERSON. 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 Anderson, Hans Christianson
2	The Biography of    by Anderson, 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.

#### 4.1.2.4 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 the more renowned schemes) they each require that a unique number be assigned to each piece in the collection. The call number can be as long as is the collection requires. Sometimes thin items have long call numbers and thick items have short ones.

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 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.

#### 4.1.2.5 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 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 correct. 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 #.

#### 4.1.2.6 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 #.user must then type in the LC #. It is possible to combine these 2 steps into one by entering 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              OR  ILS prompts ITEM
          USER replies LC#                USER enters LC=79-123456
          ILS says ENTER THE FULL...
          USER enters 79-123456
```

#### 4.1.2.7 Access by Title Key

Title access in the ILS system is almost the same as what is done 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: if a title has fewer than 4 words enter commas consecutively to fill in the key.) These 2 steps may be combined by typing (e.g.) TK=DOR,IL,ME,D. 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 #.

#### 4.1.2.8 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.

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#### 4.1.2.9 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.

#### 4.1.2.10 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.

#### 4.1.2.11 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 (050, 245)  
                          Be sure to include leading zeroes  
IN:                     Marc indicator (two numerical characters)  
                          If not appropriate for this tag press RETURN.  
SUBFIELD:              Subfield code (a, b, 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 second and third appearances  
                          of the subfield until user enters RETURN which  
                          will cause TAG: to reappear.

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'.

#### 4.1.2.12    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.

#### 4.1.3      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.

## 5 EXPERIENCE

### 5.1 INTRODUCTION

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:

#### 5.1.1 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.

#### 5.1.2 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.

## 6 HELP MAINTENANCE

### 1 OVERVIEW of HM

#### 1.1 HM - Overview

Help Maintenance is an on-line subsystem for maintaining those documents needed by the library staff in day to day operations. These documents can be created as:

- o Help displays - brief ready reference information, available on-line, concerning what to do in some particular situation.
- o Manuals - in depth information, available on-line or in printed form (depending on how they are set up), for staff education and training.

#### 1.2 HM - Purpose

Many help displays and instruction manuals (like this one) have already been prepared by the ILS systems staff. Some users may not need or want any more. However there are a number of reasons why users may wish to add their own documents or edit existing ones. These include:

- o Documenting manual procedures - Every automated system interfaces to many local manual procedures. To operate a system correctly a staff member needs ready access to information on both the manual and automated procedures.
- o Documenting library policy - A staff member should be able to find out all the library's policies quickly and should see them in their most up-to-date form. An on-line documentation system such as Help Maintenance may be the best way to keep this information available and current.
- o Documenting customized features - The ILS is designed for easy customization - at a high level by changing system parameters and tables, and at a low level by modifying the code. Help Maintenance makes it easy to keep all the documentation accurate at each different installation of the ILS.
- o Editing ILS documents - The ILS technical writers have tried to make all of their documentation clear, accurate, and easily understandable. However improvements may be possible.

#### 1.3 HM - Description

The Help Maintenance subsystem is designed to assist the user to perform the following functions:

- o Entering texts into the computer's data base.

- o Editing those texts.
- o Linking different blocks of text (called PARAGRAPHS) together to form sequences of text, and changing or rearranging those links.
- o Indexing individual texts or whole sequences.
- o Displaying texts on terminal screens or printing them on the system printer - either individually or in sequences.



2 BASIC CONCEPTS of HM

2.1 HM Concepts - Paragraph

The basic unit of text in the Help Maintenance subsystem is called a PARAGRAPH.

The ILS paragraph is not necessarily an English paragraph, i.e. a number of sentences of which the first is indented. It may be an English paragraph, or it may be a single word, a sentence, a group of English paragraphs, a list, a table, or even a graphic design.

Its distinguishing feature is that it is always treated as a unit for display or for linkage with other paragraphs.

Everything on this page is one single ILS paragraph (though more than one paragraph can be put on one page).

2.1.1 HM Concepts - Paragraph - 2 - Example

Here is another paragraph.

It includes everything in this box.

I  
n  
c  
l  
u  
d  
i  
n  
g

a few stray characters

? h  
U  
g

t  
h  
i  
s

some extraneous words

that  
what  
huh?

vertical  
s  
e  
s  
a  
g  
e

this graphic

x  
x  
x

and the borders of this box too.

Here's a very small paragraph.  
(Also in a small box.)

Here's another short paragraph.  
It's printed on the same page as the short  
paragraph above.  
It doesn't have a box around it.

2.1.2 HM Concepts - Paragraph - 5 - Size Limits

Paragraphs are always displayed as a unit, either on a CRT terminal

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..

screen, or on a printed page.

When they're displayed on a CRT, long paragraphs may turn out to be too big to fit on one screen. When that happens, the computer will display 16 lines at a time and then wait. When the operator presses <RETURN> it will display the next 16 lines, and so on until the entire paragraph has come out. Even though the paragraph is displayed in parts, it is still a unit in the sense that we cannot display the middle or end of it without going through the beginning.

If you are writing paragraphs which will be displayed on CRT screens, it may be convenient for the user if each is limited to 16 lines.

There is only one physical limitation on the size of a paragraph, viz. each paragraph must be small enough to fit in the memory of the terminal at which it was created. This is required because each paragraph is composed on the terminal and then transmitted to the computer in one block ( Basic Operations - Add).

#### 2.1.3 HM Concepts - Paragraph - 6 - Text & Structure

Paragraphs may be thought of as having two components, a TEXT and a STRUCTURE.

The TEXT is the title and all of the words, spaces, symbols, etc. of a paragraph. Everything which is displayed on the screen is the paragraph's text.

The STRUCTURE is all of a paragraph's links with other paragraphs. These links create PATHS of paragraphs or MANUALS for printing out. Paths and manuals are explained below.

#### 2.2 HM PROCEDURES - PATH

Paragraphs may be linked together to form sequences of paragraphs which are displayed or printed in the sequence order. These sequences are called PATHS. A path may contain many paragraphs or only one.

Every path must have a name. That name serves as the entry point to the path in the Help Subsystem. Thus if 'CI' is the name of a path of paragraphs which explain how to check-in a book, typing HE=CJ or /HE=CI will cause the first paragraph of that sequence to be displayed on the screen.

It may be desirable to have more than one term serve as an entry point for a given path. Thus for example someone may need help in checking in books but not know that CI is the exact form of the name of the path which explains that process. To provide these multiple entries we allow SYNONYMS to be created for any path. In the case of CI, synonyms such as CHECKIN, CHECK-IN, CHECK IN, DISCHARGE, and RETURN could be created as alternative entry terms. Any number of synonyms may be created for a given path.

#### 2.2.1 HM Concepts - Paths - 2 - Linkages

The methods used for linking paragraphs together are very simple but extremely flexible. Any particular paragraph may be at the head of a path, the middle of a path, or the end of a path (all of which sounds pretty obvious). However in addition to this, one paragraph may appear in more than one path. It may for example be at the head of one path, be in the middle of two others, and be at the end of a fourth. The same identical paragraph would then be in four different paths.

Furthermore, any path may have branches based on user responses. Thus if a user is reading a paragraph on a CRT screen and presses a certain key, he might get a certain new paragraph on the screen. However if he presses a different key he might get a different new paragraph on the screen.

The reason for putting one paragraph into several paths is that it is often desirable to present the same information in two different contexts. A cataloger for example may need to know how to search the bibliographic file and then interpret an OCLC-like display. A reference librarian may need to know how to search the same file and then interpret a reference display. Each needs some of the same information and some different information. Another use might be to provide different amounts of information for different purposes. For example there may need to be a long multiparagraph explanation of something in a manual, and a one or two paragraph extract for help displays.

It would be possible to achieve the above aim by copying one paragraph into two paths, and we can even use the computer to do the work so there need not be any double typing. However if that is done it could happen that one copy would be changed while the other is overlooked - thus leaving two conflicting texts in the system. By providing one single physical paragraph which may be linked into many paths we avoid this problem. Every document in the system is authoritative. Each reflects the most recent update of all the information it contains.

#### 2.2.2 HM Concepts - Paths - 4 - Branch on response

The reason for providing branch-on-response capability within a sequence is that it enables the user to find the specific information he needs without looking at unneeded clutter. There are a number of situations which require this, for example:

- o A staff member calls up a help display and finds that he can't understand it. A branch link might be provided to locate more general background information.
- o A staffer might find his display too general. Different branch points might be provided to enable a user to read at one level of detail and then call up additional details or go on, depending on how much he wants to know about a subject.
- o A staffer might not know where to look for the information he needs. A help paragraph might be used to present him with multiple options.

It is even possible to use the branching capability to provide programmed instructional manuals. The user would be given some information and then asked a question. His response might then be used by the branching mechanism to move him on or send him back to some previous paragraph.

All of these capabilities - context sensitive displays, documentation authority control, multiple levels of help detail, indirect access to information, and primitive computer assisted instruction, are made possible by the multi-path, branch-on-response paragraph linkage system.

### 2.3 HM Concepts - Manual

A MANUAL is a path specially created for printing out on paper. All of the paragraphs in a manual are stored on-line, just as for any other path, but they are displayed by printing them out. Three characteristics distinguish manuals from paths intended for on-line 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 on-line 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. These are explained in the chapter on Operations, section on Linking Paragraphs into Manuals.
3. All manual names must have the form 'M#', where '#' is an integer number from 0 to 99, e.g. M4, M76, M0, etc. A maximum of 100 manuals may be created.

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 on-line and printed forms.

### 2.4 HM Concepts - Directory

The DIRECTORY is the list of all help paths available to an on-line user. It is in effect a kind of index to the help system. Adding a path name to the directory accomplishes two things:

1. It inserts the name into its correct place in an alphabetical list of path names. When a help user types '\*DIR' he can see that list.
2. It provides an entry point to the help data base. When a help user enters '\*Pathname' he sees the first paragraph in that path.

The name entered in the directory need not be the same one that is used in the paragraph structures. It might be a synonym for some path name (e.g. 'DISCHARGE' for 'CHECK-IN'), or an alternative entry point to a path (e.g. 'CHECK-IN', 'RENEW', 'VERIFY', or etc. as entries into a path called 'CIRCULATION'). Thus the directory is the user's entry vocabulary for the Help

system.

Paths may be created which do not appear in the directory. Such paths may be used by a writer to designate one or more paragraphs which appear as common parts of other paths and/or manuals. However if they are not in the directory they will not appear in the alphabetical list and they may not be entered directly.

### 3 PROCEDURES of HM

To maintain a help text type HM or /HM to enter Help Text Maintenance. From there '?' or the Help Key will display all of the available commands.

There are six basic maintenance commands. They are:

Add, Edit, Find, View, Print, and Delete.

Each one may be used on the Directory of paths, the Paragraphs themselves, or the index of Manuals. To initiate a command type its first letter. The system will then ask for Directory, Paragraphs, or Manuals (D, P, or M). Depending on what the command is, the system may then ask for further information.

If you wish, you may enter several pieces of information at once by typing a space between each piece, e.g.:

A D - to add a new path to the directory.  
F P TEST - to find a paragraph with the word 'test' in its title.  
E M - edit a manual entry point.  
E M M77 - edit the entry point for manual M77.  
E P 21 S - edit paragraph 21's structure.

and so on. Each maintenance command will function somewhat differently depending on whether you are working on the Directory, the Paragraphs, or the Manual entries, however the basic principles of each are the same.

The following material explains how to perform each specific function.

#### 3.1 HM Procedures - Paragraph Add

To add a paragraph you must supply the system with a title, text, and two other pieces of information - the 'delete flag' and the 'default up path'.

The 'DELETE FLAG' marks the paragraph as deletable or non-deletable. Non-deletable paragraphs may only be removed by users with a special password which is not included in this manual.

Sometimes a user will need more general information than he is seeing on a screen. To get it he presses 'UP' in order to see previous paragraphs in the path he is examining. However if he reaches the top of that sequence and still wishes more general information a 'DEFAULT UP PATH' is required in order to furnish him with more. The default up path may be the name of any path in

the directory. 'UP' from the top paragraph of a path will take the user to the top of the default up path, if one exists. A paragraph need only be given a default up path if it is itself the top of some path. Even then the default up path is optional. If none is entered, the Help system will default up to the Help command option list.

\*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 in order to enable anyone to see it.

From HELP TEXT MAINTENANCE type 'A P' to add a new paragraph.  
Then...

DEFAULT UP PATH >

Type any existing path name as the path which the system will switch to if a user enters '/UP' from this paragraph and there is no previous paragraph to go up to. Type RETURN for no default up path.

Can this Paragraph be DELETED (Y/N) >

'Y' enables deletion of this paragraph using the 'D P' command.

'N' protects the paragraph from deletion unless a special password is entered.

TITLE >

Switch to upper/lower case if desired, then enter title of new paragraph.

COPY EXISTING PARAGRAPH (Y/N) N/

'N' or RETURN moves you on to the next step.

'Y' tells the system to copy the text from an existing paragraph. You may then edit that copied text instead of typing in a wholly new one.

COPY FROM PARAGRAPHS >

Type the number of the paragraph which you wish to copy. The system will display its title for confirmation, then initiate editing of that text rather than the add procedure below.

ADDING TEXT - WHEN DONE, PRESS f2 TO STORE OR f8 TO EXIT - PRESS 'RETURN'

Switch to upper/lower case if desired. Press RETURN and the screen will go blank. Then type in the new paragraph. Use cursor position arrows or insert/delete line/character if desired. Do NOT type in column 80 (right margin of the screen) or unwanted blank lines may be created.

When finished, press function key 'f2' to store the modified text or 'f8' to cancel and store a blank paragraph.

### 3.2 HM Procedures - Adding to the Directory

A new term added to the directory may be the name of an entirely new path, a synonym for an existing path, or an alternative entry point to an existing path (i.e. one that starts the user at some place other than the first paragraph in that existing path). To add a new term, you must furnish the system with the following information:

the new name.  
whether or not this name is deletable.  
the name of any path for which this is a synonym or an alternative entry  
point.  
'starting' and 'previous' paragraph numbers.  
definition

The starting paragraph is the one which is first displayed when the user types the new path name. The 'previous' paragraph is the one which the user will go 'up' to if he enters 'UP' from the starting paragraph. HOWEVER, note that neither 'UP' nor any other transition from one paragraph to another will work unless both the starting paragraph and whichever paragraph is previous or next have the new path name and linkages added to their structure (see Linking Paragraphs into Paths). If the new name is only an alternate entry point to an existing path, you need only use the same previous paragraph number already defined for the new 'starting' paragraph in the old path. The existing paragraph structures will continue to work.

It may be wise not to add a term to the directory until after all the work of creating and linking the paragraphs which will be displayed under that term is already finished. Otherwise there is some risk that Help users will find and try to read your new data before it is in a fit state to be seen.

From Help Text Maintenance type 'A D' to add a new term to the directory. Then...

NEW PATH NAME >

Type the new term to be entered in 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 Help Text Maintenance.

SYNONYM FOR PATH >

If this term is a synonym for an existing path, type the name of that path. Otherwise press RETURN. If you do enter a path name, no other information is required. The system will insert the new term in the directory, define it as a synonym for the path you have named here, and return you to the top of Help Text Maintenance.

IS PATH DELETABLE (Y/N) >

'Y' enables deletion of this term from the directory using the Delete command.

'N' protects the term from deletion unless a special password is entered.

ALTERNATE ENTRY FOR PATH >

Enter the name of an existing path if you wish the new term to be an alternative entry point to that path. Otherwise press RETURN.

STARTING PARAG >

Enter the number of the paragraph which you wish to be displayed first when the Help user types this new path name.

PREVIOUS PARAG >

If this directory entry is an alternate entry point for an existing path,



you may enter the previous para# which already exists in that path. For example:

Assume that 'ABC' is an existing path and 'NEW' is a new alternative entry point for ABC which you are now adding. Assume that para# 451 will be the starting paragraph of NEW and that in ABC, para# 451 has para# 722 as its previous paragraph.

If you make 722 the previous para# in NEW, then the new directory entry will work with no changes to the structure of para# 451.

If you entering an entirely new path, not an alternative entry point to an existing path, then make the previous para# = 0.

#### 25 CHARACTER DEFINITION >

Enter the definition which you wish to appear alongside the new term in the directory.

#### SAVE THIS ENTRY (Y/N) >

'Y' to confirm and return to the top of Help Text Maintenance.

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 you have not already done so, you should now create any linkages needed to link paragraphs into this path (see Linking Paragraphs into Paths).

### 3.3 MH Procedures - Adding a New Manual

A manual is a linear sequence of paragraphs linked together and formatted for printing. In order to create one it is necessary to establish the paragraph links (see 'Linking Paragraphs into Manuals') and create an entry point in the list of manuals.

Creating that entry point 'adds' the manual to the system. It enables you to print manuals in just the same way that adding a path name to the Help Directory enables users to access that path.

To add a manual to the list of manuals you must give the system:

- a manual number
- title
- definition
- starting paragraph number

One manual may be made to include others simply by putting a manual number in instead of a starting paragraph number.

From Help Text Maintenance type 'A M' to begin adding a new manual.

Then...

#### 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#' from Help Text Maintenance.

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 for use in Help Text Maintenance.

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. If you type a manual number the system will respond with:

INCLUDE MANUAL Mxx (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 a paragraph number or RETURN.

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 to confirm.

#### 3.4 HM Procedures - Linking Paragraphs into Paths

Linking a paragraph into a path requires several operations.

First, you must 'edit' the paragraph structure. This includes identifying:

- the new path name.
- the paragraph you wish to be previous to this one in the path. You may specify 'ANY' to mean that all of the following works the same way no matter what paragraph is previous to this one. 'ANY' still allows you to specify specific previous paragraph numbers which will be treated differently
- =

..

the user response to move him from the previous paragraph to this one, the next paragraph after this one, any alternate path, i.e. one which you wish to switch to upon reaching the next paragraph, the prompt which you wish to be displayed with this paragraph if the user types '?' to find out what the responses mean.

Secondly, you must then edit the structures of the previous and next paragraphs in order to complete the links between them (see 'Edit Paragraphs').

First find the number of the paragraph you wish to link into a path - you can search for it using the F(ind) command and/or verify it using the V(iew) command. Then, from HELP TEXT MAINTENANCE, type 'E P' to begin editing a paragraph.

Then...

PARAGRAPHS >

Enter the number of the paragraph you wish to link into a path.

EDIT T(ext) or S(tructure) >

Enter 'S' for structure.

You may abbreviate the above steps by typing 'E P # S' from HELP TEXT MAINTENANCE, where '#' is the number of the paragraph you wish to link into the path.

The system will display the paragraph number and its title and then list any paths and manuals which the paragraph currently participates in.

PATH Number or Name >

Assuming the path you want to link this paragraph into is not already listed (if it is, see the procedure for 'Editing Paths'), type the new path name.

LINK TO NEW PATH 'Pathname' (Y/N) >

'Y' confirms that you wish to link this paragraph to a path to which it is not now linked.

PREVIOUS PARA# >

If the Help user will be coming to this paragraph from another paragraph, enter the number of that paragraph here. If he will be coming here directly by entering a path name (this is the first paragraph in that path), enter '0' - then be sure to create a directory entry for the path with '0' as the 'previous path' and this paragraph's number as the 'starting path' (see Directory Add procedure).

You may enter 'ANY' to mean that the links specified below will work no matter what previous paragraph the user has come from. This still allows you to enter specific previous paragraph numbers later which will then automatically supersede the 'ANY' control for those specific previous paragraph numbers.

RESPONSE >

Type the character or character string which the user must enter to move from the previous paragraph to this one. If there is no real previous paragraph (i.e. this is the first paragraph in a new path), then any

..  
dummy response will do.

FULL REFERENCE ESTABLISHED

NEXT PARA# = /

Enter the number of the next paragraph you wish the user to go to after he finishes with this one. If there is no more, enter the number of this paragraph.

SWITCH TO ALTERNATE PATH = /

If you wish the user to leave the path he is in at this point and start a new one beginning with the next paragraph, enter the name of the new path.

PROMPT = /

Enter a character, word, message, or whatever which you wish the Help System to display as a prompt to enable the user to go on to the 'next paragraph' specified above.

SAVE THESE CHANGES (Y/N) >

'Y' to confirm. The system will now ask for any further paragraph linkages you wish to make within this path (remember that one path may have multiple branches in it), or for '-' to return to the top of HELP TEXT MAINTENANCE.

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. If this is the first paragraph in a path, you MUST make an entry in the directory if you wish users to be able to directly access it.

### 3.5 HN Procedures - Linking Paragraphs into Manuals

Linking a paragraph into a manual is much like linking one into an on-line Help path. You identify the paragraph you wish to work on and begin the procedure for linking that paragraph into a path. Then when the system asks for 'PATH Number or Name >', you respond with a name in the form 'N#', where 'N' is an integer number. That tells the system that the 'path' you wish to link to is in fact a manual.

You then furnish the system with linkage and format information including:

previous paragraph#.

next paragraph# - the 'next paragraph' may in fact be a whole manual, or a series of manuals, which you wish to be included in the text of this manual after the paragraph you are now on. They will appear as 'sections' of the chapter you are in, or subsections if you are already at the section level, and so on.

- Does it start a new page?

Does it begin a new chapter, section or subsection?

As with linking paragraphs into paths, you MUST also edit the structure of the previous paragraph to make this one its 'next paragraph', and the next paragraph (if there is one) to make this one its 'previous paragraph'.

It may be difficult to create a manual with a perfect print format on the first try. However once the manual is created it is not difficult to go back and edit the sequence and format as needed to get a polished looking result.

First find the number of the paragraph which you wish to link into a manual - you can search for it using the F(ind) command and/or verify it using the V(iew) command. Then, from Help Text Maintenance, type 'E P' to begin editing a paragraph.

Then...

PARAGRAPH# >  
Enter the number of the paragraph which you wish to link into a manual.

EDIT T(ext) or S(tructure) >  
Enter 'S' for structure.

You may abbreviate the above steps by typing 'E P # S' from Help Text Maintenance, where '#' is the number of the paragraph you wish to link into the manual.

The system will display the paragraph number and its title and then list any paths and manuals in which the paragraph currently participates.

PATH Number or Name >  
Assuming the manual you want to link this paragraph into is not already listed (if it is, see the procedure for 'Editing Manuals'), type the new manual number. The name must be of the form 'M#' (e.g. M77, M2, etc.) where '#' is an integer number.

LINK TO NEW PATH 'M#' (Y/N) >  
'Y' confirms that you wish to link this paragraph to a manual to which it is not now linked.

(MANUAL M#)  
PREVIOUS PARA# = /  
Enter the number of the paragraph which you wish this paragraph to follow. If this will be the first paragraph in the manual, enter '0'.

NEW PAGE (Y/N) = /  
'Y' causes the printer to start at the top of a new page when it prints this paragraph.

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.

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. If the answer to 'NEW CHAPTER' is 'N' then the answer to this question is automatically '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. If the answer to 'NEW CHAPTER' or

'NEW SECTION' is 'N' then the answer to this question is automatically 'N' and the 'NEW SUBSECTION' prompt will not appear.

NEXT PARA# = /

Enter the number of the paragraph which you wish to follow this one in the print sequence. If there is no more, press RETURN.

You may cause an entire manual to be printed next instead of just another paragraph by typing a manual number in the form 'M#' instead of a paragraph number. The system will then ask:

INCLUDE MANUAL M# (Y/N) >

Type 'Y' to confirm. The system will then again ask for:

NEXT PARA# = /

You may include more manuals, type a paragraph number, or RETURN as is described above.

SAVE THESE CHANGES (Y/N) >

'Y' to confirm and begin again for any further modifications to the structure of this paragraph.

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. In order to print the manual, you MUST also add the manual entry point to a list of manuals (see Adding a New Manual).

### 3.6 HM Procedures - Editing Paragraph Text

The 'text' of a paragraph is its title and the material displayed on a Help user's screen or in a manual. Editing it is very simple.

First find the number of the paragraph you wish to link into a path - you can search for it using the F(ind) command and/or verify it using the V(iew) command. Then, from HELP TEXT MAINTENANCE, type 'E P' to begin editing a paragraph.

Then...

TITLE = [The title of this paragraph]

/

Switch to upper/lower case if desired and type in any new title. Be sure to type the complete new title, not just the changes. If there are no changes, press RETURN.

COPY OTHER PARAGRAPH (Y/N) N/

'N' or RETURN moves you on to the next step.

'Y' tells the system to replace the existing text with text copied from some other paragraph. You may then edit that copied text before saving it. (If you do not save the new text, the old one will still remain.)

COPY FROM PARAGRAPHS >

Type the number of the paragraph which you wish to copy. The system will display its title for confirmation, then initiate editing of the replacement text.

EDITING TEXT - WHEN DONE, PRESS f2 TO STORE OR f8 TO EXIT - PRESS 'RETURN'  
Press RETURN and the screen will display the existing text of this paragraph. Switch to upper/lower case if desired and then edit the text. You may add or modify text anywhere on the screen and may use the regular keys plus the cursor position arrows and insert/delete line/character keys. You may also add or edit text 'below' the screen using the roll up/roll down keys. Do NOT type in column 80 (right margin of the screen) or unwanted blank lines may be created.

When finished, press function key 'f2' to store the modified text or 'f8' to cancel all the changes and keep the original text.

If using upper/lower case, switch back to upper case CAPS LOCK.

### 3.7 HM Procedures - Editing Paths

To edit a path you must change the structures of the specific paragraphs in that path.

A path is a sequence or linkage of paragraphs but, as explained in the section on HM Concepts - Paths - Linkage, the links are stored with the paragraphs rather than in separate chains. To edit a path, e.g. to change the sequence order of paragraphs in that path or to add a new branch on response, it is necessary to change the 'structures' of the specific paragraphs which are involved in the change.

Suppose for example that we have a path which goes through the following paragraphs:

77.192.4.210.99.140

Now we want to insert a new paragraph, 166, in the middle to get:

77.192.4.166.210.99.140

We must break the link between 4 and 210 by eliminating 210 as a 'next paragraph' in 4 and eliminating 4 as a 'previous paragraph' in 210. We then add 166 as a next paragraph in 4, 210 as a next paragraph in 166, 166 as a previous paragraph in 210, and 4 as a previous paragraph in 166.

This sounds a little more cumbersome than it actually is since the deletions and additions can be accomplished in a single act of replacing one value with another.

Now consider a path with branches such as:



39 \*  
140

Paragraph 192 has three branches (to 4, 166, and 210) and 140 has two entrances (from 166 and 99).

If we want to add a new sequence in this path to go from 192 to 99 to 140, we must add a new response to 192 and a new previous paragraph to 99.

Finally, suppose we have two paths:

Path1 - 77,192,4,210,99,140  
Path2 - 400,179,...(15 more paragraphs)...356,357

and we want to incorporate Path2 in the middle of Path1, e.g. between 4 and 210 to get:

Path1 - 77,192,4,400,179,...,356,357,210,99,140.

One way to do this would be to link each paragraph in Path2 into Path1. This would require us to edit twenty-one paragraphs, 4 and 210 from Path1 and all nineteen from Path2.

A more convenient way would be to:

replace 210 with 400 as a next paragraph in 4,  
replace 4 with 357 as a previous paragraph in 210,  
add 4 as a previous paragraph in 400,  
add 210 as a next paragraph in 140 (maybe as a branch on response),

and

switch path names from Path1 to Path2 when going to 400,  
switch path names from Path2 to Path1 when leaving 357.

The Help user would now be able to enter Path1, slip into Path2 without even being aware of it, and return to the rest of Path1 when he is finished. The only 'penalty' (if indeed it is one) is that at the end of Path2 there must be two valid responses, one to quit and one to see the remainder of Path1. If we simply wished to tack Path2 onto the end of Path1, then even this penalty would not exist since the Help user would be quitting at the end of Path2 regardless of where he entered the sequence.

EDIT T(text) or S(structure) >  
Enter 'S' for structure.

You may abbreviate the above steps by typing 'E F # S' from HELP TEXT MAINTENANCE, where '#' is the number of the paragraph you wish to edit.

The system will display the paragraph number and its title and then list any paths and manuals which the paragraph currently participates in.

PATH Number or Name >

Enter the number or name of the path you wish to edit. If the one you want is not listed, see the procedure for Linking Paragraphs into Paths.

PARAGRAPH =                    DEFAULT: UP PATH =                    DELETE FLAG =



..

PATH	PP#	RESPONSE	MP#	ALT. PATH	MESSAGE/PROMPT
------	-----	----------	-----	-----------	----------------

All of the existing combinations of previous paragraph numbers and responses for this paragraph in this path will be listed under the above headings. You may now add to them, change them, or delete one or more of them.

CHANGE DEFAULT UP PATH OR DELETE FLAG (Y/N) N/

'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.

DEFAULT UP PATH = \_\_\_\_\_ /

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.

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.

PREVIOUS PARA# >

Enter:

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

The number of a new previous paragraph in this path, or

'ANY' - meaning any previous paragraph other than ones specifically named.

'\*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.

RESPONSE >

Enter:

An existing response for the previously identified PP# for which you wish to change the next paragraph, or

A new response which you wish to add to the previous paragraph, or

'\*KILL[space]Response' where Response is an existing response which you wish to delete from association with the previously identified PP#. 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.

#### FULL REFERENCE ESTABLISHED

The system now knows what specific previous paragraph#/response pair you are editing.

#### NEXT PARA# = \_\_\_\_ /

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.

#### SWITCH TO ALTERNATE PATH = \_\_\_\_ /

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'.

#### PROMPT = \_\_\_\_\_ /

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.

#### SAVE THESE CHANGES (Y/N) >

'Y' to confirm.

#### CONTINUE ADDING AT R(esponses), P(PP#), or - to EXIT >

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

### 3.8 HM Procedures - Editing Manuals

To edit a manual you must change the structures of the specific paragraphs in that manual.

A manual is a sequence or linkage of paragraphs but, as explained in the section on HM Concepts - Manuals, the links are stored with the paragraphs rather than in separate chains. To edit a path - e.g. to change the sequence order of paragraphs, to add or delete a paragraph, or to add or delete a whole sub-manual - it is necessary to change the 'structures' of the specific paragraphs which are involved in the change.

To change the name, definition, or starting paragraph of a manual, edit its entry point (see HM Procedures - Editing Manual Entry Points).

First find the number of the paragraph whose structure you wish to edit - you can search for it using the F(ind) command and/or verify it using the V(iew) command. Then, from Help Text Maintenance, type 'E P' to begin editing a paragraph.

Then...

PARAGRAPH# >  
Enter the number of the paragraph which you wish to edit.

EDIT T(ext) or S(tructure) >  
Enter 'S' for structure.

You may abbreviate the above steps by typing 'E P # S' from Help Text Maintenance, where '#' is the number of the paragraph you wish to edit.

The system will display the paragraph number and its title and then list any paths and manuals which the paragraph currently participates in.

PATH Number or Name >  
Enter the display number or the manual number (in the form 'M#') of the manual which you wish to edit.

(MANUAL M#)  
PREVIOUS PARA# = \_\_\_/  
Enter the number of the paragraph which you wish this paragraph to follow, or type RETURN to accept the existing number.

If this will be the first paragraph in the manual, enter '0'.

NEW PAGE (Y/N) = \_\_\_/  
Type 'Y' or 'N' or RETURN to accept the existing value.

'Y' causes the printer to start at the top of a new page when it prints this paragraph.

NEW CHAPTER (Y/N) = \_\_\_/  
Type 'Y' or 'N' or RETURN to accept the existing value.

'Y' causes the title of this paragraph to appear as a chapter heading in the table of contents and the text.

NEW SECTION (Y/N) = \_\_\_/  
Type 'Y' or 'N' or RETURN to accept the existing value.

'Y' causes the title of this paragraph to appear as a section heading in the table of contents and the text. If the answer to 'NEW CHAPTER' is

'N' then the answer to this question is automatically 'N' and the 'NEW SECTION' prompt will not appear.

NEW SUBSECTION (Y/N) = \_/   
 Type 'Y' or 'N' or RETURN to accept the existing value.

'Y' causes the title of this paragraph to appear as a subsection heading in the table of contents and the text. If the answer to 'NEW CHAPTER' or 'NEW SECTION' is 'N' then the answer to this question is automatically 'N' and the 'NEW SUBSECTION' prompt will not appear.

NEXT PARA# = \_/   
 You may replace the existing value by typing a new one. The new one will then be the next paragraph to follow this one in the print sequence.

To accept the existing value, type RETURN.

To delete the whole entry and not replace it (because this may be the last paragraph in the manual), type 'K' or 'KILL'.

You may cause an entire manual to be printed next instead of just another paragraph by typing a manual number in the form 'M#' instead of a paragraph number. The system will then ask:

INCLUDE MANUAL M# (Y/N) >   
 Type 'Y' to confirm. The system will then again ask for:

NEXT PARA# = \_/   
 You may include more manuals, type a paragraph number, 'K' or RETURN as is described above.

SAVE THESE CHANGES (Y/N) Y/   
 'Y' or RETURN to confirm and begin again for any further modifications to the structure of this paragraph.

NOTE: If you have changed the 'previous' or 'next' paragraphs of this manual sequence, you MUST also make this paragraph a 'next paragraph' in the previous paragraph's structure, and a 'previous paragraph' in the next paragraph's structure. In order to print the manual, there MUST also be a manual entry point for it (see Adding a New Manual).

### 3.9 MM Procedures - Editing the Directory

Any term in the directory may be modified or deleted.

To delete a term from the directory it is only necessary to supp' its name with a delete command.

To modify one you must go through a procedure very like the one for adding to the directory.

To delete a deletable term from the directory type 'D D'.   
 Then...

\_PATHname >

--

Type the name of the path you wish to delete from the Help Directory.

You may abbreviate this step by typing 'D D Pathname' from HELP TEXT MAINTENANCE.

DELETE PATH 'Pathname' FROM THE HELP DIRECTORY:

ARE YOU SURE (Y/N) >

'Y' to confirm. The system will flash 'DELETED !!!' and return you to the top of Help Text Maintenance.

Terms which are defined as non-deletable in the directory may also be deleted, but only with a special password.

To modify the characteristics of a term in the directory...

From HELP TEXT MAINTENANCE type 'E D' to begin editing the directory. Then..

PATHname >

Type the name of the path you wish to edit.

You may abbreviate this step by typing 'E D Pathname' from HELP TEXT MAINTENANCE.

EDITING PATH = \_\_\_\_\_

SYNONYM FOR PATH = \_\_\_\_\_ /

To make this term a synonym for some other path, enter the name of that path.

To delete an existing synonymous relationship type '\*K'.

To do nothing, press RETURN.

If you create a synonym, no other information is required. The system will update the directory and return you to the top of Help Text Maintenance.

DELETE FLAG = \_ /

'Y' enables deletion of this term from the directory.

'M' protects the term from inadvertent deletion.

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 PARAG# = \_ /

Enter a new starting paragraph number or RETURN to leave the existing one unchanged.

=

1

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.

IS CHARACTER DEFINITION = \_\_\_\_\_  
NEW >

Enter a new definition of this directory term or RETURN to leave the existing one.

The system will now display the complete specifications for this directory entry and ask:

SAVE THIS ENTRY (Y/N) >  
'Y' to confirm and return to the Top of Help Text Maintenance.

### 3.10 4M Procedures - Editing Manual Entry Points

Editing a manual entry point is exactly like adding one. The only difference is that you are replacing existing values instead of adding new ones.

From Help Text Maintenance type 'E N' to begin editing a manual entry point.

Then...

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#' from Help Text Maintenance.

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 Text 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 Mxx (Y/N) Y/  
'Y' or RETURN to confirm.

The system will prompt again for another

STARTING PARAG = \_\_\_ /  
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.

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 to confirm and return to the top of Help Text Maintenance.

### 3.11 HM - Procedures - Utilities

Help Text Maintenance provides a number of utility programs which assist  
the library administrator in maintaining the Help database. These programs  
enable a user to:

Find data on the basis of partial information.

View data.

Print data.

Delete data.

#### 3.11.1 HM - Procedures - FIND Utility

FIND is a utility command for finding a character string in a directory  
entry, manual title, or paragraph title. It is especially useful for finding  
the number of a manual or paragraph of which all you know is the title or a  
part of the title.

To find a character string, from Help Text Maintenance type 'F D', 'F P',  
or 'F M' (D=Directory, P=Paragraph, M=Manual).

Then...

CHARACTER STRING TO FIND >

Type in any characters or words you wish to search for. They must be in  
the same exact order as in the titles you are searching, e.g. 'hm - p'  
will retrieve 'HM - Purpose' and all of the 'HM - Procedures...'. It

..

would not retrieve a title called 'HM Purpose' because that title does not include the dash or the extra space between the two words

Upper/lower case distinctions are ignored. 'TEST' will retrieve 'TEST', 'Test' and 'test' equally well.

You may abbreviate the above step by typing 'F D String', 'F P String' or 'F M String' directly from Help Text Maintenance.

- - -

If you are searching for a paragraph the system will display:  
paragraph number  
title

If you are searching for a manual the system will display:  
manual number  
title  
definition  
starting paragraph number

If you are searching the directory the system will display:  
path name  
the term for which this term is a synonym (if there is one)  
delete flag  
alternate path (if there is one)  
previous paragraph number  
starting paragraph number  
definition

### 3.11.2 HM - Procedures - VIEW Utility

VIEW is a utility command for looking at directory entries, paragraphs or manuals. It is especially useful for confirming that you have the right path name, manual or paragraph before editing or deleting it.

To view a DIRECTORY entry, from Help Text Maintenance type 'V D'.  
Then...

VIEW DIRECTORY FROM >  
Enter any path name or character string. The system will display the first five directory entries alphabetically following the name or string you entered. The elements displayed are:  
entry term - a path name or synonym  
path for which this term is a synonym (if any)  
delete flag  
alternate path (if any)  
previous paragraph number  
starting paragraph number  
definition

-

You may abbreviate this step by typing 'V D String' from Help Text Maintenance.



To view a PARAGRAPH, from Help Text Maintenance type 'V P'.  
Then...

PARAGRAPH# >  
Enter the number of the paragraph to view.

VIEW T(text) or S(structure) >  
Enter 'T' to see the paragraph text, 'S' to look at any paths or manuals  
it is in.

If viewing the structure of a paragraph, the system will respond with:

PARA#: [P#]. - [Title]  
PATHS: 1. \_\_\_\_\_ 2. \_\_\_\_\_ etc.

PATH Number or Name >  
Enter the number from the above list, or the name of a path  
or manual number of a manual.

You may abbreviate the above steps by typing 'V P P# T' or  
'V P P# S Pathname' from Help Text Maintenance.

The system will display the exact same information as would be seen in  
editing paragraph text or structure except that editing is not initiated.

To view a MANUAL title, from Help Text Maintenance type 'V M'.  
Then...

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:  
title  
manual number  
definition  
starting paragraph number

You may abbreviate this step by typing 'V M String' from Help Text  
Maintenance.

### 3.11.3 HM - Procedures - DELETE Utility

DELETE is a utility command for weeding the Help database. It can be used  
to delete a whole paragraph (both text and structure), a directory entry, or a  
manual entry point. When deleting the latter two, the system does NOT delete  
any paths or manuals from paragraph structures (see procedures for editing  
paths and manuals).

The form of all deletes is the same. From Help Text Maintenance type  
'D D', 'D P' or 'D M'.

Then...

One of the following prompts will appear.

PATHname >  
PARAGRAPH# >  
MANUAL# >

Enter the directory entry term, the paragraph number, or the manual number for the item to be deleted.

You may abbreviate this step by typing 'D D Pathname', 'D P P#' or 'D M M#' from Help Text Maintenance.

DELETE [PATH 'Pathname' FROM THE DIRECTORY]  
[PARAGRAPH P# - 'Title of the paragraph']  
[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.

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.

## 7 ITEM DELETE

### 7.1 INTRODUCTION

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:

#### 7.1.1 ID Overview

ITEM DELETE is used when weeding an item or removing the record of a lost item. Authorized users can permanently remove bibliographic records from the Master Bibliographic File (MBF) and from the activity record associated with each item.

The user must first identify the item for which the record is to be deleted. The user can then delete a specific Volume, Issue, Part, Supplement or Copy. If the library owns only one copy of the item, the user can remove it entirely from the MBF.

For step by step procedures of ITEM DELETE go FORWARD.

For a discussion of SPECIAL FEATURES of ITEM DELETE press 'F' and RETURN twice.

#### 7.1.2 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:

#### 7.1.2.1 Identify Item

##### IDENTIFYING ITEMS WITH THE BARCODE SCANNER

The barcode scanner 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 waving over a coded version of this 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 little 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!" After a little practice with the wand users will feel more comfortable using it.

##### 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 # | 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 # |   |

#### 7.1.2.2 Access by Item Identification Number

Identifying items by their ITEM IDENTIFICATION NUMBER is one possible, yet uncommon way to access an item in the ILS system. The IID# is the alpha and numeric equivalent to the pattern of vertical black lines which make up the barcode 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 bar code 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 IID#=0 #0 1 90 4 in response to the prompt ITEM.

SAMPLE: ILS prompts ITEM: ILS prompts ITEM:  
USER types IID# OR USER replies IID#=0 #0 1 90 4  
ILS asks for the IID#  
USER enters IID# value

#### 7.1.2.3 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=ANDERSON ILS will display all entries with ANDERSON as author, without regard to which ANDERSON. 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 Anderson, Hans Christianson
2	The Biography of by Anderson, 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.

#### 7.1.2.4 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 the more renown schemes) they each require that a unique number be assigned to each piece in the collection. The call number can be as long as is the collection requires. Sometimes thin items have long call numbers and thick items have short ones.

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 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.

#### 7.1.2.5 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 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 correct. 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 #.

#### 7.1.2.6 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 #. user must then type in the LC #. It is possible to combine these 2 steps into one by entering 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 ILS prompts ITEM  
USER replies LC# OR USER enters LC=79-123456  
ILS says ENTER THE FULL...  
USER enters 79-123456

#### 7.1.2.7 Access by Title Key

Title access in the ILS system is almost the same as what is done 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: if a title has fewer than 4 words enter commas consecutively to fill in the key.) These 2 steps may be combined by typing (e.g.) TK=DOR,IL,ME,D. 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 #.

#### 7.1.2.8 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.

#### 7.1.2.9 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.

#### 7.1.2.10 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.

#### 7.1.2.11 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, Febetc.).
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
                           'X' to DELETE.

NO REMAINING VIPS OR COPIES.
DELETE MBF RECORD AS WELL? NO/ RETURN to delete only the activity record or
                              'X' to remove the item from the MBF entirely.

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

```

7.1.3 ID Special Features

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

```

*****
* MASTER BIBLIOGRAPHIC FILE *   This file contains the full MARC record
*                               *   for each item listed in the MBF.
*                               *
*****
/                               I
*****
* ACTIVITY * ACTIVITY * ACTIVITY *   This record contains information on a
* RECORD 1 * RECORD 2 * RECORD 3 *   specific volume/issue/number.
*****                               An activity record will exist for each
                                     copy of every item in the library.

```

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

## 8 ITEM STATUS

### 8.1 INTRODUCTION

ITEM STATUS permits authorized users to view the status of any copy of any title in the ILS collection. It will specifically tell users whether the item is (e.g.) available for circulation, or if it is alleged to be lost, missing or otherwise unavailable.

#### 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:

#### 8.1.1 IS Overview

ITEM STATUS 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, or used in-house
6. Current status of the item
7. Status of other copies of the item, if desired.

#### 8.1.2 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.

#### 8.1.2.1 Identify Item

##### IDENTIFYING ITEMS WITH THE BARCODE SCANNER

The barcode scanner 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 waving over a coded version of this 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 little 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!" After a little practice with the wand users will feel more comfortable using it.

##### 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 # | 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 # |   |

#### 8.1.2.2 Access by Item Identification Number

Identifying items by their ITEM IDENTIFICATION NUMBER is one possible, yet uncommon way to access an item in the ILS system. The IID# is the alpha and numeric equivalent to the pattern of vertical black lines which make up the bar code and is found on the bar code 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 bar code 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 IID#0 \$# 1 00 4 in response to the prompt ITEM

SAMPLE: ILS prompts ITEM: ILS prompts ITEM:  
USER types IID# OR USER replies IID#=0 \$# 1 00 4  
ILS asks for the IID#  
USER enters IID# value

#### 8.1.2.3 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=ANDERSON ILS will display all entries with ANDERSON as author, without regard to which ANDERSON. 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 Anderson, Hans Christianson
2	The Biography of by Anderson, 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.

#### 8.1.2.4 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 the more famous schemes) they each require that a unique number be assigned to each piece in the collection. The call number can be as long as is the collection requires. Sometimes thin items have long call numbers and thick items have short ones.

To access by call number the user must type an 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 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.

#### 8.1.2.5 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 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 correct. 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 #.

#### 8.1.2.6 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 #. user must then type in the LC #. It is possible to combine these 2 steps into one by entering 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 OR ILS prompts ITEM  
USER replies LC# USER enters LC#79-123456  
ILS says ENTER THE FULL..  
USER enters 79-123456

#### 8.1.2.7 Access by Title Key

Title access in the ILS system is almost the same as what is done 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: if a title has fewer than 4 words enter commas consecutively to fill in the key.) These 2 steps may be combined by typing (e.g.) TK=DOR,IL,ME,D. 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 #.

#### 8.1.2.8 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.

#### 8.1.2.9 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.

#### 8.1.2.10 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.

#### 8.1.2.11 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 \$ ss CALL#: TL686.M6S9 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>.

#### 8.1.2.12 IS Special Features

As of June 16, 1980 there are no known special features for ITEM STATUS.



## 9 NEWLY CATALOGED ITEM

### 9.1 INTRODUCTION

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 the ILS Tape Files (work spaces) into the MBF. It also permits catalogers 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:

#### 9.1.1 NE Overview

NEWLY CATALOGED ITEM permits authorized users to enter cataloging data into the Master Bibliographic File (MBF).

If a book is new or has circulated with a temporary ID, NEWLY CATALOGED ITEM will search the MBF and the Tape File for a record of the item. This search will start when the user enters either the title or the call number. If the Tape File contains a MARC record for the item, the user may edit or add to the record and produce a permanent barcode label for the item. If the MBF contains a MARC record for the item the user may enter a Copy 2 (or 3, etc.) and produce a barcode label.

For a step by step discussion of NEWLY CATALOGED ITEM press 'F'.

#### 9.1.2 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:

#### 9.1.2.1 SEARCH FOR ITEM

ILS will display:

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' and a RETURN twice to view EDIT RECORD.

#### 9.1.2.2 ME 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'.

#### 9.1.2.3 ME 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 - Enter the index # and ILS will prompt  
IN THE MBF 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.

9.1.2.4 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'.

9.1.2.5 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'.

9.1.2.6 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 of NEWLY CATALOGED ITEM press the 'G'.

#### 9.1.2.7 ME 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 (050, 245)  
Be sure to include leading zeroes.

IN: MARC indicator (two characters)  
If not appropriate for this tag press RETURN

SUBFIELD: Subfield code (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 the result would be 'Medicine'. The user should enter 'ned' in response to REPLACE and 'ne' in response to WITH. This would 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'.

#### 9.1.2.8 ME 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  
                          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 enter 'Y'  
                          ILS will display:

VOLUME:                Volume number.  
ISSUE:                  Issue number.  
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.

#### 9.1.3 ME 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'.

10 PATRON ACTIVITY

10.1 INTRODUCTION

PATRON ACTIVITY permits authorized users to view information about any patron's library activity. Information available includes items currently checked out, items on reserve, messages associated with the patron, and total number of items ever borrowed by the patron.

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:

10.1.1 PA Overview

PATRON ACTIVITY permits authorized users to view the following items on a patron's record:

- o items currently checked out and due dates
- o title of any reserves being held for the patron
- o amount of any outstanding fines
- o any messages attached to the patron record

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

10.1.2 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		AUTHOR	DUE DATE	RENEW
ID	TITLE			

ITEMS ON RESERVE		AUTHOR	REQUESTED ON	NO NEED AFTER
ID	TITLE			



TOTAL ITEMS CHECKED OUT:  
MESSAGE(S)  
RETURN TO CONTINUE: (ILS will again prompt for PATRON#)

For HELP with patron identification enter '?' and a RETURN.

#### 10.1.2.1 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 bar code on their library card, or entering the equivalent bar code 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 5th 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 the patron's 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 their 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.

#### 10.1.3 PA Special Features

As of June 27, 1980 there are no special features for the PATRON ACTIVITY.

11 PRINT BARCODE

11.1 INTRODUCTION

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:

11.1.1 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.

11.1.2 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. This data may be stored for any length of time 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. This data may be stored for any length of time determined locally.
3. Batch Print Barcode Labels (B) - Using the stored data, produce Barcode Labels on the printer. This can be done days or weeks after the data is entered using 1 or 2 above.

Each alternative has its own step by step procedure.  
For more HELP enter the number of the desired choice or FORWARD to SPECIAL FEATURES:

#### 11.1.2.1 PS 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 9 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 # | 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 # |   |

For more HELP enter the number of the desired option.

#### 11.1.2.2 Access by Item Identification Number

Identifying items by their ITEM IDENTIFICATION NUMBER is one possible, yet uncommon way to access an item in the ILS system. The IID# is the alpha and numeric equivalent to the pattern of vertical black lines which make up the bar code and is found on the bar code 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 bar code 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 IID#0 \$# 1 90 4 in response to the prompt ITEM.

```
SAMPLE: ILS prompts ITEM:          ILS prompts ITEM:
        USER types IID#           OR   USER replies IID#0 $# 1 90 4
        ILS asks for the IID#
        USER enters IID# value
```

#### 11.1.2.3 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=ANDERSON      ILS will display all entries with ANDERSON as
                        author, without regard to which ANDERSON. 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 Anderson, Hans Christianson
2       The Biography of by Anderson, 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.

#### 11.1.2.4 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 the more renowned schemes) they each require that a unique number be assigned to each piece in the collection. The call number can be as long as is the collection requires. Sometimes thin items have long call numbers and thick items have short ones.

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 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.

#### 11.1.2.5 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 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 correct. 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	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 .

#### 11.1.2.6 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 #.user

must then type in the LC #. It is possible to combine these 2 steps into one by entering 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		ILS prompts ITEM
	USER replies LC#	OR	USER enters LC#79-123456
	ILS says ENTER THE FULL...		
	USER enters 79-123456		

#### 11.1.2.7 Access by Title Key

Title access in the ILS system is almost the same as what is done 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: if a title has fewer than 4 words enter commas consecutively to fill in the key.) These 2 steps may be combined by typing (e.g.) TK=DOR,EL,NE,D. 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 #.

#### 11.1.2.8 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.

#### 11.1.2.9 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.

#### 11.1.2.10 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.

#### 11.1.2.11 PB Identify Patron

If the user enters (P)ATRON in response to CHOICE>

ILS will display:

(B)ATCH OR (S)INGLE PATRON? S/

User enters:

'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 those names.  
If 'B' is chosen ILS will follow the  
sequence on the next screen.

ILS will display:

PRINT PATRON LABEL  
FROM NAME:

User enters:

The first name to be printed, for example - Blair.



THROUGH NAME: The final name to be printed, for example - Conn.

(U)NPRINTED NAMES ONLY OR 'U' - Prints only the labels which have never been  
(A)LL NAMES: printed before in the alphabetic sequence from Blair to Cohn.

'A' - Prints all labels in the alphabetic sequence from Blair to 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 the patron's 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 their 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.

11.1.2.12 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 it was 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 it has been printed before.

Now press 'T' to go back to STEP BY STEP PROCEDURES for PRINT BARCODE or press 'F' and a RETURN twice to get to SPECIAL FEATURES.

11.1.3 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.

12 PATRON DELETE

12.1 INTRODUCTION

The PATRON DELETE procedure permits authorized users 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:

12.1.1 PD Overview

The PATRON DELETE procedure permits authorized users to remove patrons from the patron list. When the user has positively identified and deleted a patron, the patron's name is removed from every part of the ILS system.

For Step by Step Procedures press 'F' and RETURN.

For Special Features of PATRON DELETE press 'F' and RETURN twice.

12.1.2 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.

#### 12.1.2.1 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 bar code on their library card, or entering the equivalent bar code 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 the patron's record to select the correct entry, you could enter D1 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 their 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.

12.1.2.2 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.

12.1.3 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.

### 13 PRINT TEMPORARY LABEL

#### 13.1 INTRODUCTION

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:

#### 13.1.1 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 wished to circulate an item before it was processed. A temporary label might also be used on a book obtained through Interlibrary 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 book and one for the book card.

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

#### 13.1.2 PT Step By Step

PRINT TEMPORARY LABEL should follow these steps:

ILS will prompt:

User enters:

THE LAST TEMPORARY ITEM BARCODE # IS: 325

ILS will list the number of the last temporary label produced.

..  
ENTER STARTING LABEL NUMBER: 3267

Press RETURN if this number is correct.

HOW MANY LABELS:

Enter the number of labels you want.

... PRINTING ...

The requested labels will be produced.

13.1.3 PT Special Features

As of June 27, 1980 there are no Special Features for PRINT TEMPORARY LABELS.

14 PATRON REGISTRATION

14.1 INTRODUCTION

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.

14.1.1 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).

Registration - IIS will display a patron registration form on the screen. As the user enters information the cursor will move 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 IIS will display the original registration form (with the blanks filled in) and the user may now edit the record.

Press 'F' and RETURN to get to Step By Step procedures for PATRON REGISTRATION.

14.1.2 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:

IIS 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: If this information changes the user may edit it.  
CITY: /  
STATE: / (see EDITing below)  
ZIP: /

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 is to be left unchanged the user should press RETURN and the cursor will move to the next prompt. If the data is 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.

#### 14.1.3 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.

Special Feature 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.

15 PATRON STATUS

15.1 INTRODUCTION

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:

15.1.1 PS Overview

PATRON STATUS permits authorized users to view information in the patron record and information displayed by PATRON ACTIVITY. This data can consist of name, address, and status of the patron. It will also list items currently checked out or on reserve and any messages associated with the patron.

For Step By Step procedures of PATRON STATUS press 'F' and RETURN.

15.1.2 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: 03/19/92  
ORGANIZATION: OSD                          OFFICE SYMBOL: XYZW              ROOM#: 1234  
PHONE: 555-1234                            MAILSTOP: HERE  
ADDRESS: 123 MAIN STREET  
                 SMALLTOWN VA 22302      HOME PHONE: 123-4567

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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.

#### 15.1.2.1 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 bar code on their library card, or entering the equivalent bar code 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 E.  
4 JONES, JOHN F.  
5 JONES, JOHN R.
```

and you wanted to display more information from the patron's 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 their 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.

#### 15.1.3 PS Special Features

As of June 16, 1980 there are no known special features for the Patron Activity function.

NOTE to the SYSTEM ADMINISTRATOR: Format of the PATRON STATUS display will vary from site to site. You may wish to alter the text of the PS - STEP BY STEP paragraph to reflect your own displays.

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16 TIME & DATE

16.1 INTRODUCTION

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 "clock and a calendar" built into its internal working parts, 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.

**MED**  
**8**