

AFO 111 – Cataloguing records

111.1 Introduction

When you start this AFO the standard search screen is displayed:

Search for a record

Standard **System number** **Z39.50**

Search expression

Select search method Find Browse

Select user index All words

Language

Published in or before

Published in or after

Location

Material type

Date added to database

Number of pages

Bibliographic type

Sublocation

Save settings

OK
Cancel
Help
New record
Savelists
Previous
Connect
WebOpac

This screen has three separate search options.

The **Standard** search allows you to enter a search term and select an index. You can look for keywords or index words. You can also limit the search by applying restrictions such as language of publication or material type. The specific indexes and the restrictions will vary from site to site. The settings are determined when the bibliographic database is first set up.

A **System number** search allows you to search for a bibliographic record by entering the system number of the record, or a number attached to the record such as an item barcode, an acquisitions order number, inventory number or subscription number.

A **Z39.50** search allows you to search for bibliographic records in an external database or group of databases.

Buttons on this screen

OK: Click to start a search.

Cancel: Leave this screen to go back to the main menu.

New record: To go too the screen for entering a new bibliographic record.

Savelists: Shows the savelists for your login ID.

Previous: To retrieve the bibliographic record that was last accessed.

WebOpac: See section 111.2.5 for more information.

111.2 Searching 111.2.1 Tab “Standard”

The [Search for a record](#) form is displayed:

Search for a record

Standard **System number** **Z39.50**

Search expression

Select search method Find Browse

Select user index

Language

Published in or before

Published in or after

Location

Material type

Date added to database

Number of pages

Bibliographic type

Sublocation

Save settings

OK

Cancel

Help

New record

Savelists

Previous

Connect

WebOpac

- Enter a search term in the **Search expression** field.
- Select the search method (Find or Browse).

- Select an index from the drop-down box.
- Define any restrictions you want to use to limit the search.
- Click **OK**.

Note

Searching can be done in specific indexes and for specific information. There is one exception:

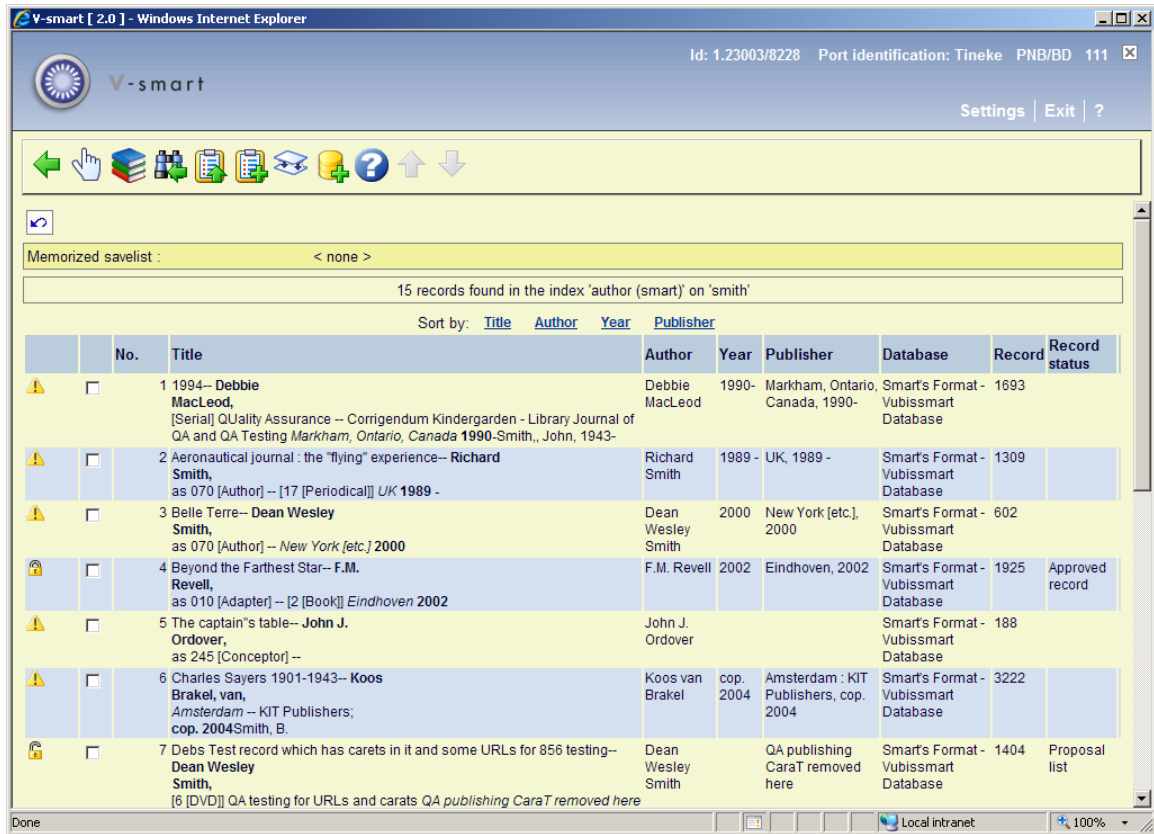
If you scan in an item barcode into the search field on the first tab (does not matter which index) and there is an item barcode which matches, then the corresponding bibliographic record is retrieved.

If you are intentionally looking for the (numeric) string in a specific index (and there might be a matching barcode) then insert a space before the text entered so that the index search can be done.

Find search

When you use this method to search, the system looks through the fields in all the records. It searches those fields that have been mapped to the index selected. So an **Author keywords** search will look at all the indexed author fields; a subject search may look at the title and subject fields.

The system then displays a list in title order of all the titles that have matched the search. The columns displayed depend on your system setup. In the example below the search term was *Smith* and the index selected was *Authors*:



You can truncate left, middle or right with * (asterisk) or use \$ (dollar) as a wild card. For **Find** searches a minimum of 4 characters is needed

Boolean operator can be used. When you key in two words V-smart will automatically apply a Boolean AND.

Browse search

When you use this method to search, the system looks through the indexes and retrieves a list of the index terms that contain the search term and shows the number of records that have that index term. In the example below the same search term Star and All Words index was used as in the **Find** example:

12 matching terms found in the index 'all words' on 'star'		
No.	Matching terms	No. of records
<input type="checkbox"/>	1 STAR	39
<input type="checkbox"/>	2 STARCH	1
<input type="checkbox"/>	3 STARFARERS	1
<input type="checkbox"/>	4 STARKER	1
<input type="checkbox"/>	5 STARS	8
<input type="checkbox"/>	6 STARSHIP	2
<input type="checkbox"/>	7 STARSPINNER	1
<input type="checkbox"/>	8 STARSTRIKE	1
<input type="checkbox"/>	9 START	2
<input type="checkbox"/>	10 STARTIDE	1
<input type="checkbox"/>	11 STARTING	1
<input type="checkbox"/>	12 STARTUP	1

- Select one of the index terms [STAR] and click the **Select No.** icon on the toolbar

The system then displays the titles attached to that term.

Note

You can only enter one term in the **Search expression** box when using a Browse search.

111.2.2 Tab “System number”

A **System number** search allows you to search for a bibliographic record by entering the system record number of the record, or a number attached to the record such as an item barcode, an acquisitions order number, inventory number or subscription number.

The screenshot shows a dialog box titled "Search for a record" with a light green background. At the top left, there are two small icons and the title. Below the title, there are three tabs: "Standard", "System number" (which is selected and highlighted in blue), and "Z39.50". The "System number" tab contains a search form with three fields: "Enter system number" with the value "200800030", "Select standard index" with a dropdown menu showing "Order no. (internal)", and "Select database" with a dropdown menu showing "Vubis Smart database". Below these fields is a checkbox labeled "Save settings" which is currently unchecked. To the right of the main form is a vertical toolbar with a close button (X) at the top, followed by buttons for "OK", "Cancel", "Help", "New record", "Savelists", "Previous", "Connect", and "WebOpac".

The system will look for an exact match of the number.

- To search for a record with a specific item barcode, enter an item barcode number in the **Enter system number** Field
- Select **Item barcode** from the drop-down box
- Click **OK**.

If there is a match the system displays the **Full record** screen.

111.2.3 Tab “Z39.50”

A **Z39.50** search allows you to search for bibliographic records in an external database or group of databases. A search to an external database using the Z39.50 protocol requires the configuration of your library server and client interface using an Application Program Interface (API). This is a program that is there to connect to other programs. V-smart uses two APIs, one for the server side and one for the client side, to connect V-smart to a Z39.50 client or a Z39.50 server. See your Infor representative for details, as this is a separate option.

See also section 111.4.2.1 for information on the use of Z39.50 when copying records to your local database.

111.2.4 Search result screen

Depending on the type of search you have executed, the result screen may look different. The various possibilities are described below.

Tab standard – Find search

After executing a Find type search from the Standard Tab, a summary screen will be displayed:

No.	Title	Database	Record	Record status
1	Beyond the Farthest Star [Book]	Smart's Format - Vubissmart Database	391	
2	Beyond the Farthest Star [Book]	Smart's Format - Vubissmart Database	1925	Approved record
3	Beyond the Farthest Star [Book]	Smart's Format - Vubissmart Database	4057	
4	Beyond the Farthest Star with new record status codes [Book]	Smart's Format - Vubissmart Database	1988	Under analysis
5	Beyond the first star with carets removed	Smart's Format - Vubissmart Database	1245	
6	Beyond the Star above and more and less [Book]	Smart's Format - Vubissmart Database	1244	Complete record
7	Inside Star Trek : Notice copiée / Herbert F. Solow; Robert H. Justman; Joseph Miklaszewski; Donald R. Beck; Herbert Solow; Yvonne Fern Solow	Smart's Format - Vubissmart Database	1130	
8	Jonge dieren / [tekst Angela Serena Ildos ; red. Alberto Bertolazzi ... et al. ; vert. uit het Engels Doris Elzinga]	Smart's Format - Vubissmart Database	3416	
9	The murdered star	Smart's Format - Vubissmart Database	4073	
10	Onder de Groene Ster / Lin Carter	Smart's Format - Vubissmart Database	1175	
11	Onder de Groene Sterred / Lin Carter	Smart's Format - Vubissmart Database	214	
12	Red star rising with carets or without carets : SUBTITLE / Anne McCaffrey	Smart's Format - Vubissmart Database	630	
13	A separate star : A Science Fiction Tribute to Rudyard Kipling / David Drake; Sandra Misal	Smart's Format - Vubissmart Database	267	

The top of the screen displays the number of records found, the index searched and the search term. The header portion indicates whether or not there is an active savelist for the current user.

The left hand column may display status icons. These can be defined in AFO 651 – Miscellaneous cataloguing parameters.

By default the system displays the columns **Title**, **Database (name)**, **Record (number)** and **Record status**. You can create your own display by defining a WebOpac template that is to be used for the AFO 111 display. See the help of the WebOpac Preferences for more information.

You can click on one of the links above the result display to sort the results by the selected criterion.

Options on the screen

Select record: Select a line and then this option to view the details. See section 111.4.2 for a description of the technical overview screen.

Add/Display Items: Select a line and then this option, the system will display the item overview screen for the selected record. See section 111.5.1 for a description of this screen.

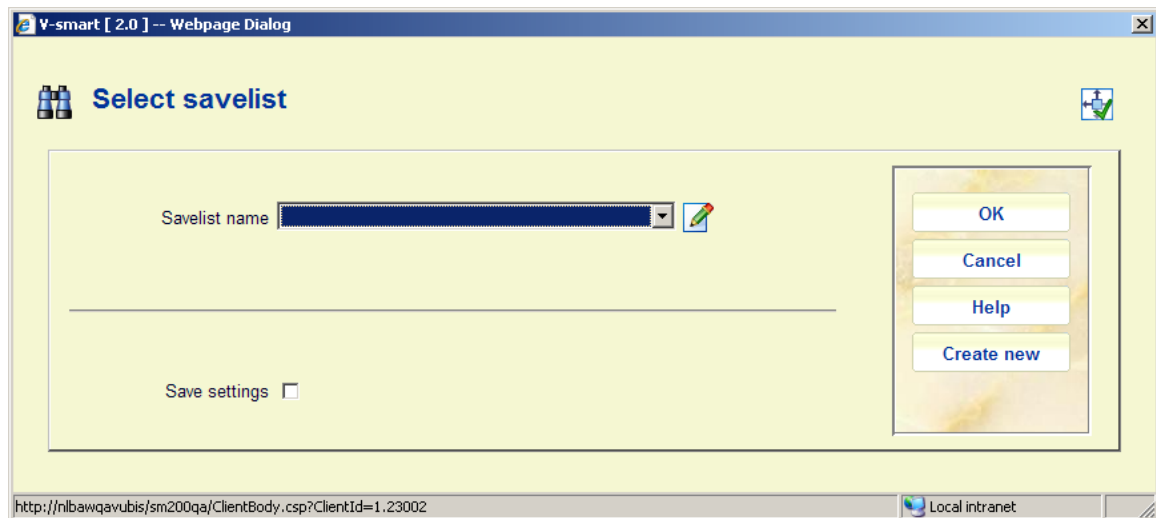
Repeat search without restrictions: This launches a new search for the same search term(s), but without using any previously selected restrictions.

Modify search query: This option takes you back to the search form. When you return to the search screen, the last search term you entered will be retained and you can modify it to adjust your search.

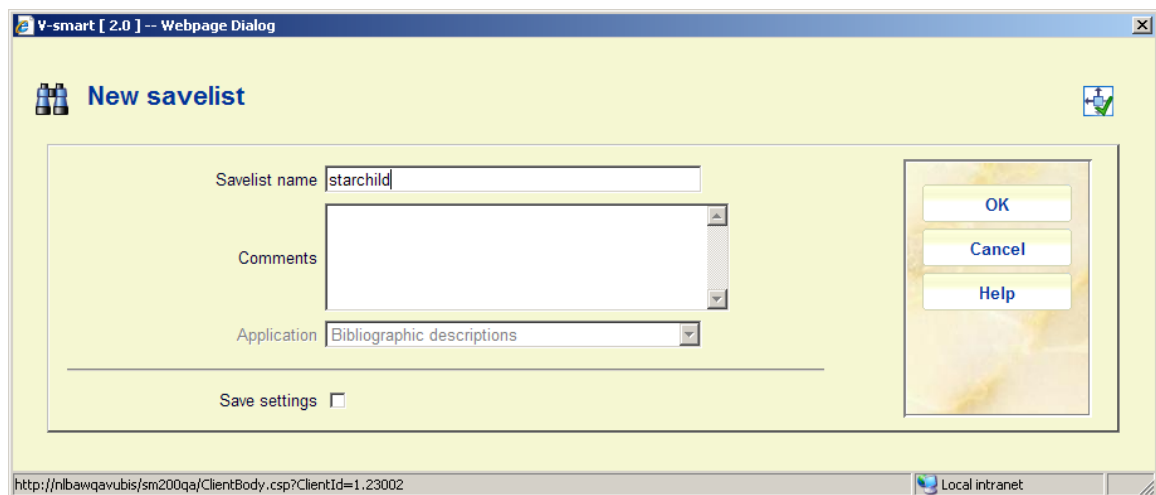
Note

This only works if you have a default setting defined for the initial search screen. E.g. you have entered “star trek” as search string and checked the ‘Save settings’ box. Every time you access an AFO with a bibliographic search form, this search term will appear. Enter another search term, e.g. “christie”. If you then use the **Modify search query** option, the search form will still contain the string “christie”. You can now change this to e.g. “agatha christie” and perform a new search. When you leave the AFO, the search form will revert to the original search string (“star trek” in our example).

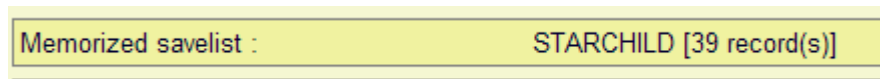
Copy all records to savelist: With this option you can add the search results to a savelist. See the help of AFO 141 for more information on using savelists. An input form will be displayed:



You can select an existing savelist (for the current user) from the dropdown list or click on **Create new**, after which another input form will be displayed:



After this, the name of the current savelist will be displayed in the header:



Copy selected record(s) to savelist: Select a number of lines (by using either SHIFT or CTRL keys) and then this option, which is similar to the option described above.

Merge record: Use this option to mark a record for merging with another record. See the help of AFO 115 for more information on this procedure.

Copy selected record(s) to database: Select a number of lines (by using either SHIFT or CTRL keys) and then this option to copy the selected records to another database on your system. *All selected records must belong to the same database.* The system displays the Copy record(s) form:

The screenshot shows a web browser window titled "V-smart [2.0] -- Webpage Dialog". The main content area is a dialog box titled "Copy record(s)". It features a "To database" dropdown menu currently set to "Test Smart (smart format)". Below it is a "With input profile" dropdown menu. A list box labeled "Also copy relations" contains three entries: "2. Star child / James P Hog - Relation tester may26", "3. Star Trek Greatest Battle - Balance of terror / Vincent McEveety; Paul Schneider", and "3. Star Trek Greatest Battle - Basics, part I / Michael Pillar". At the bottom left of the dialog is a "Save settings" checkbox. On the right side, there are three buttons: "OK", "Cancel", and "Help". The status bar at the bottom of the browser window displays the URL "http://nlbawqavubis/sm200qa/ClientBody.csp?ClientId=1.23002" and "Local intranet".

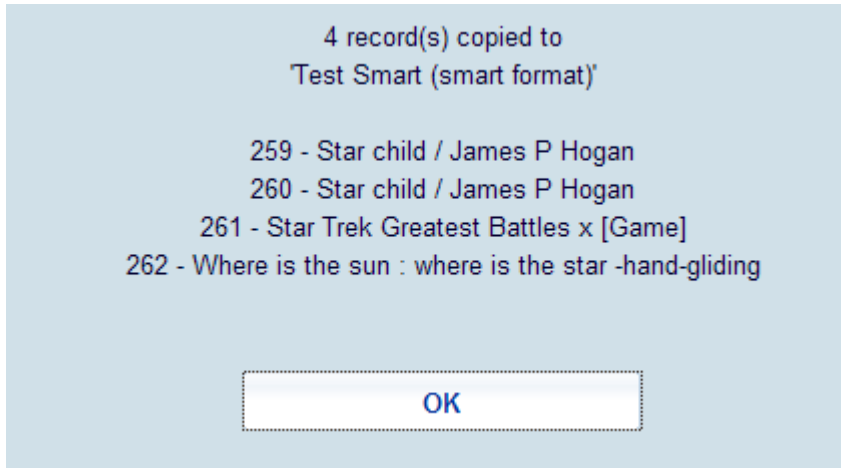
The **Also copy relations** field contains all of the relations linked to the selected records. Each relation contains the selected record number, title of the selected record and title of the relation. When the two databases are not of the same format, you **MUST** specify an input profile in order to convert the records to the other format.

Fields on this form follow the same rules and restrictions as the Copy record form that is used to Copy one record (see section 111.4.2.1).

Click **OK** and the system asks for confirmation:

The screenshot shows a confirmation dialog box with a light blue background. The text inside the dialog asks: "Are you sure you want to copy the selected record(s) to database 'Test Smart (smart format)'?". Below the text are two buttons: "OK" and "Cancel".

After clicking **OK**, the system copies each selected record into the specified database. When the process is complete, the system displays a form summarizing the results of the copy.



The summary display shows the record number (in the new database) assigned to each copied title.

Tab standard – Browse search

After executing a Browse type search from the Standard Tab, a summary screen will be displayed:

V-smart [2.0] - Windows Internet Explorer

Id: 1.23002/1980 Port identification: Tineke PNB/BD 111

Settings | Exit | ?

← → ? ↑ ↓

Memorized savelist : STARCHILD [39 record(s)]

12 matching terms found in the index 'all words' on 'star'

No.	Matching terms	No. of records
<input type="checkbox"/>	1 STAR	39
<input type="checkbox"/>	2 STARCH	1
<input type="checkbox"/>	3 STARFARERS	1
<input type="checkbox"/>	4 STARKER	1
<input type="checkbox"/>	5 STARS	9
<input type="checkbox"/>	6 STARSHIP	2
<input type="checkbox"/>	7 STARSPINNER	1
<input type="checkbox"/>	8 STARSTRIKE	1
<input type="checkbox"/>	9 START	3
<input type="checkbox"/>	10 STARTIDE	1
<input type="checkbox"/>	11 STARTING	1
<input type="checkbox"/>	12 STARTUP	1

Done Local intranet 100%

The top of the screen displays the number of matching terms found, the index searched and the search term. The header portion indicates whether or not there is an active savelist for the current user.

After selecting a term a list of corresponding titles will be displayed in the same manner as the search result screen described above.

Tab System number

When searching in one of these indexes and there is a match, the system displays the **Full record** screen. If there is no match, an error message will be displayed. An exception is a search by a portion of a shelfmark. This will result in a title summary display grouped by unique shelfmark:

Memorized savelist : STARCHILD [39 record(s)]

10 records found in the index 'shelfmark index main databases' on 'pnb 123'

No.	Title	Database	Record	Record status
PNB 123				
1	Conversations at Curlow Creek / David Malouf.	Smart's Format - Vubissmart Database	1010	
2	Venue d'Evelyne à Bruxelles	Smart's Format - Vubissmart Database	1016	
3	The best lovesongs of the era [CD]	Smart's Format - Vubissmart Database	1265	
4	MC: A Boy And His Tank / Leo Frankowski	Smart's Format - Vubissmart Database	1563	
5	Dierenbaby's in de kou / [auteur: Jennifer Schofield ; vert. uit het Engels: Els Peeters]	Smart's Format - Vubissmart Database	3229	
PNB 123 MAU				
6	Mauprat / George Sand ; uit het Frans vert. door Rosalien van Witsen	Smart's Format - Vubissmart Database	3183	
PNB 123 MEER				
7	Mag ik Nina even [orig]? : zeven verhalen // Kiril Boelitsjev	Smart's Format - Vubissmart Database	88	Approved record
PNB 12345				
8	Lijmen [Book] -- Het Been -- Kaas	Smart's Format - Vubissmart Database	1260	
9	Jimmy's vlucht door de jungle / J.F. van der Poel ; [ill. Jaap Kramer]	Smart's Format - Vubissmart Database	2553	
PNB 123TVB				
10	Tineke's type 5 title	Smart's Format - Vubissmart Database	3577	

The display and options are similar to the search result screen as described above.



111.2.5 Button WebOpac

Cataloguers using the advanced search possibilities of the WebOPac (multiple criteria for example) with a professional profile will be able to "push" a record to Cataloguing without having to perform a search in AFO111.

When you click the button **WebOpac** a new window will be opened to start a WebOpac session. Here you can perform a normal search. Once you have selected a record, there is a button **Retrieve record** on the full record display screen.

Full description Page 3 / 10

Title 2 The murdered moon
Record Number 1781
Publisher New York [etc.], 1996
Pages 277 p.
ISBN 0-14-222222-4

ISBN/ISSN 0-14-222222-4
First author Christie Golden <<--Click here to find other works
Title 1 The murdered moon
Year of publication 1996
Material Type  

Sublocation Code(s) DEBS,VW
Location(s) Codes PNB/BD

<i>Location (wording)</i>	BD : debsnewlocation Test	No items currently available for loan
	BD : Volks Wagen	Not available
	BD : tvb 123	No items currently available for loan

Availability No items currently available for loan

[Retrieve record](#) [Details availability](#) [Related works](#)

When you click on this, you will return to your V-smart session, with the technical overview of the selected record on your screen.








Notes

A parameter in the user settings of V-smart will determine which WebOpac profile will be activated from within AFO 111.

This button appears in all AFO's where a bibliographic search can be performed (like 211, 221, 311, 321, 421, 422 etc.)

111.3 Search restrictions

If you want to limit your search you can add restrictions.

Standard	System number	Z39.50
Search expression	<input type="text"/>	
Select search method	<input checked="" type="radio"/> Find <input type="radio"/> Browse	
Select user index	All words 	
Language	<input type="text"/>	
Published in or before	<input type="text"/>	
Published in or after	<input type="text"/>	
Location	<input type="text"/>	
Material type	<input type="text"/>	
Date added to database	<input type="text"/>	
Number of pages	<input type="text"/>	
Bibliographic type	<input type="text"/>	
Sublocation	<input type="text"/>	







The restrictions you see will depend on those defined for your database (in AFO 151 – Data dictionary for records – Indexes – Restrictions). You may see more of fewer than those in this example. The available restrictions are:

- Language: the language of the title as stored in the appropriate field for the bibliographic format (e.g. tag 101 for Smart format and tag 008, and then tag 041 for MARC21)
- Published in or before: the publication date of the title as stored in the appropriate field for the bibliographic format (e.g. tag 210 for Smart format and tag 008, and then tag 260 for MARC21)
- Published in or after: the publication date of the title as stored in the appropriate field for the bibliographic format (e.g. tag 210 for Smart format and tag 008, and then tag 260 for MARC21)
- Location: the location code that is part of the shelfmark of the title
- Material type: the material type that is part of the shelfmark of the title
- Date added to the database: the date the title was added to the database, as stored in the technical information of the record

- Number of pages: the number of pages of the title as stored in the appropriate field for the bibliographic format (e.g. tag 215 for Smart format and tag 300 for MARC21)
- Bibliographic type: the bibliographic type (i.e 1 – 6), as stored in the technical information of the record
- Sublocation: the sublocation code that is part of the shelfmark of the title
- Price: the price of the title as stored in the appropriate field for the bibliographic format (e.g. tag 010 for Smart format and tag 020 for MARC21)
- Calendar date: This is used against a specially defined special format. It has no effect on standard bibliographic records (in Marc21, Unimarc or Smart format). It can be used if you have a field in the standard format which is defined as text and is in the format YYYYMMDD.
- Visible in WebOpac: the WebOpac visibility flag (set manually), as stored in the technical information of the record
- Record status: the record status (set manually), as stored in the technical information of the record

Apply a restriction by selecting from the drop-down box next to the restriction.

For some restrictions you can select more than one value. For example you could restrict the search to Location BD and CTR by pressing down the CTRL key.

Language	<input type="text"/>	
Published in or before	<input type="text"/>	
Published in or after	<input type="text"/>	
Location	<input type="text"/>	
Material type	<div style="border: 1px solid black; padding: 2px;"> BD [BD] </div>	
Date added to database	<div style="border: 1px solid black; padding: 2px;"> BRA [BRA] </div>	
Number of pages	<div style="border: 1px solid black; padding: 2px;"> CEN [CENTRAL LIBRARY] </div>	
Bibliographic type	<div style="border: 1px solid black; padding: 2px;"> CL [CENTRAL LIBRARY FOR MARC21] </div>	
Sublocation	<div style="border: 1px solid black; padding: 2px;"> CTR [CENTRAL LIBRARY FOR UM] </div>	
	<div style="border: 1px solid black; padding: 2px;"> EAST [EAST] </div>	
	<div style="border: 1px solid black; padding: 2px;"> FRA [TEST LOCATION FR] </div>	
	<div style="border: 1px solid black; padding: 2px;"> NLD [NEDERLAND] </div>	

Restrictions are maintained as follows:

Part 1

Which restrictions indexes must be available?

In AFO 151 – Data dictionary for records – Indexes – Indexes you must define the restriction indexes themselves.

Part 2

Which restrictions must be available on the staff search screen?

In AFO 151 – Data dictionary for records – Indexes – Restrictions you can determine whether or not a restriction must be made available by setting the 'In use' flag.

Part 3

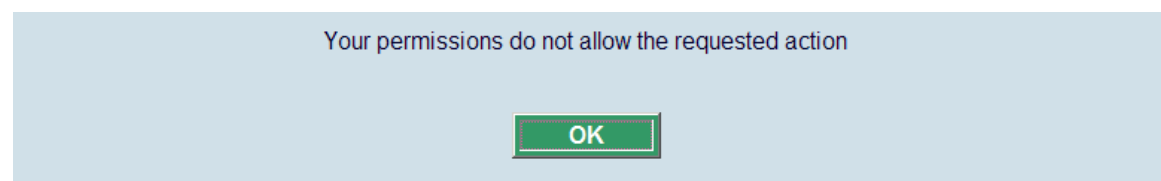
Which restrictions must be available on the WebOpac search screen?

This is defined via the Web Preferences tool.

111.4 Creating a new record

Please note

If your system uses cataloguing permissions, it is possible the message below appears in case you are not permitted to add, modify or delete records.



See the relevant help section of AFO 651 for more information.

For users with access to multiple databases the AFO 611 permission to access AFO 111 must be set for each database to be able to access all functions within AFO 111.

To create a new bibliographic record click the **New record** button. The **New record** dialog box is displayed:

V-smart [1.0.01]

New record

Database: Vubis Smart database

Template: FR/Book

Visible in WebOpac:

The publication type determines the way holdings and items are structured and managed.

Choose publication type

- Monograph [type 1]
- Multi volume (fixed number, with item data) [type 2]
- Multi volume (fixed number, without item data) [type 5]
- Multi volume (ongoing, without item data) [type 3]
- Serial [type 4]
- Analytical [type 6]

Save settings:

OK
Cancel
Help

- Select the **Database** that you want to add the new record to from the drop-down list. This will usually be Bibliographic database.
- Select the **Template** you want to use to create the new record from the drop-down list. Templates are created and maintained in AFO 153.
- Uncheck the box if you *do not* want the record to be **Visible in WebOpac**
- Select a publication type. The most usual is **Monograph [type 1]**.
- Click **OK**.

Each record will be given a unique number in the database. This record number is displayed in the information bar on many screens.

If you select the correct template the **Record editor** window is displayed:

Record	Actions	Edit	2.4038
ISBN	Number		
	Avail./price		
	Invalid no.		
Language	Publication		
Title	Main title		
	Gen. mat.		
	Parallel title		
	Subtitle		
Edition	Edition		
Imprint	Place [pu]		
	Publisher		
	Year [pu]		
Phys. descr.	Pages		
	Phys. details		
	Dimensions		
Tracks	Text		
Abstract	Text		
Author [pri.]	Function		
	Last name		
	First name		
	Date(s)		
Keyword 1	Authority		
	Main		
	Form		

You can enter data by moving the cursor to the appropriate subfields, if these are displayed for your template, and typing in the information.

- Enter data in the appropriate subfields. You can overwrite indicators and subfield codes.
- You can add tags and subfields if they are not already displayed.
- Leave tags empty if there is no data to enter. The system will remove the empty tags when the record is saved.
- Click the **Save** icon to save the new record to the database.
- Use the mouse, or the Up, Down, Left and Right arrows keys to move the cursor anywhere in the window.
- Use the End and Home keys to move to the end or beginning of a tag.
- Use Tab to move from tag to indicators and from indicators to subfield.
- You can use standard Windows features such as Cut, Copy and Paste.
- Use the **Undo** feature to undo the last action.

The bibliographic record can have several fields that are controlled by authority records. An example is the Personal name field.

You can search for an authority record in the **Record editor**, and either insert it in the field, or replace the existing data with another authority. Place the cursor in the correct field; click the **Search for** icon on the toolbar or select **Record - Search for...** (F11 function key). If the relevant parameter in AFO 651 has been set, you can enter a search string in the field. This will then become the search string for an F11 search.

You can use the **Field form** button to help you enter data. This is particularly useful for the Leader field and the Fixed field tags such as the 008 tag but can be used for any tag.

- Move the cursor to the correct field.

- Click the **Field form** icon on the toolbar.

- The system displays a dialog window with the appropriate subfields for the field.

- Select a code from the drop-down box or enter data in the subfields as appropriate.

- Click **OK**.

- The system inserts the data into the tag in the **Record editor** window.

When you have completed the data entry for the record you can save the record to the database. The system will check against the format defined in the Data Dictionary for the order of fields and to see if there are any errors according to the rules defined for the format.

Instead of saving the record you can also use the **Save as template** option.

- From the **Record** menu select the **Save as template...** option.

- The **Save as template** dialog box is displayed.

- Enter a name for the template in the **Name template** text box

- Check the **Include data** check box if you want the template to have data such as text in the fields, as well as the tags or labels

- Select Public or Private for the **Type of template**
- public - everybody in your library can work with the template
- private - you can create and change the template for your own use.
- Enter free text in the **Comments** box
- Click **OK**
- The system saves the record as a template.

You can use the **Z39.50 search** button to enrich a record opened in the record editor via a Z39.50 search.

- click this button
- select a search profile from the dropdown list
- from the search result screen, select a record to combine with the record currently being edited

The search profile must be an "update" type profile that specifies exactly which fields from the record open in the editor will be used for the Z39.50 search, so the search key can be created automatically.

The profile is defined in 651 -> Server parameters -> Z39.50 -> Z39.50 client : target profiels -> toolbar button "Cataloguing profiles".

When you decide to merge the incoming record with the existing record, you must select an appropriate merge profiel (as defined in AFO 115 – Merging profiles).

111.4.1 Inserting diacritics

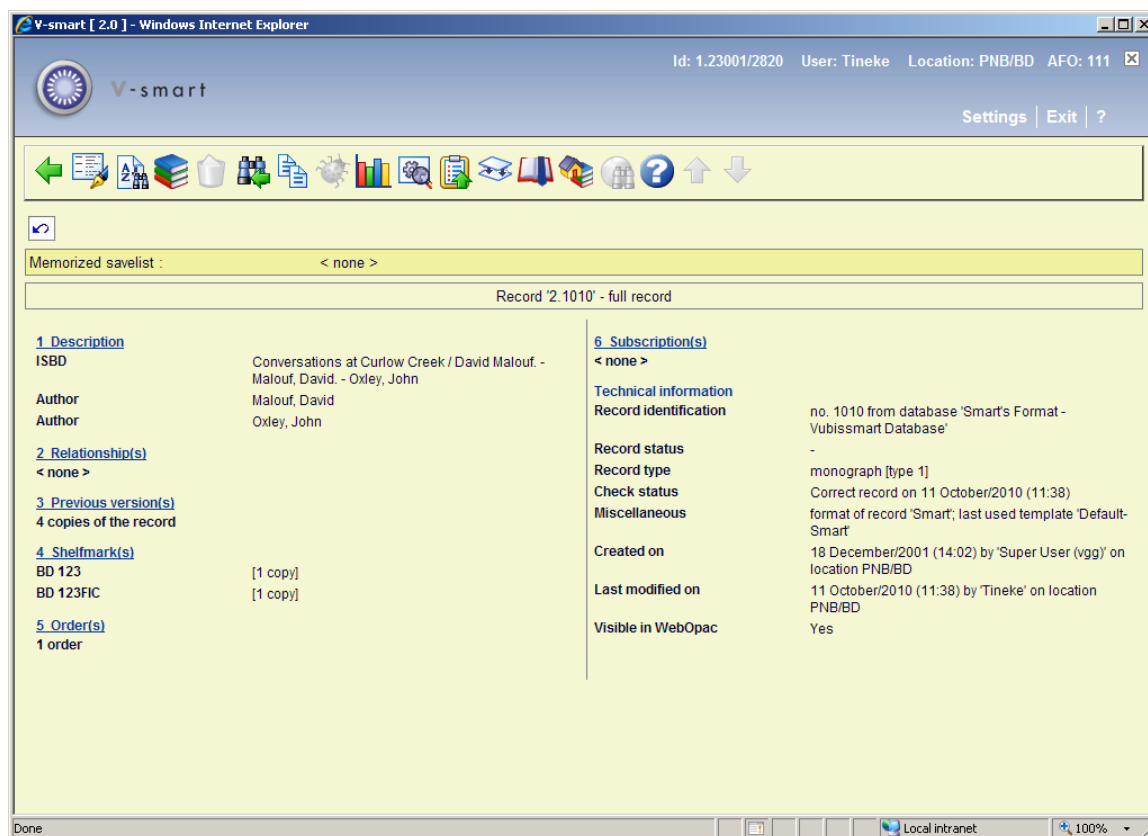
To insert special characters, you have several options:

- Cut-and-paste from Windows character map (for incidental insertion of a diacritic)
- You can install various keyboards under Windows. Then you can switch the keyboard for diacritics.

- By use of external tool (it would be the library's responsibility to buy and maintain such a tool)

111.4.2 Technical overview screen of record

Back to the technical overview screen of the record:



This initially displays summary information in various groups.

Technical information:

This group displays information about when the record was added and modified, and by whom. The only field you can edit directly is the **Record status** field. You can also change the template of the record.

Record identification	This shows the internal system number and the name of the database.
Record status	This displays the current status of the record, the user who set the status, and the date and time. Options for status are: No special status, Incomplete record, Complete record, Provisional record,

	Approved record.
Record type	This indicates the type of record, such as monograph or serial.
Check status	Whenever you save a record the system checks the record for errors against the defined format, such as MARC21. Correct status indicates the record has been saved with no errors. Incorrect status means the record has been saved with errors. The system shows the last time the record was saved. If the record was loaded through the bibliographic loader then this field displays <i>Record not checked</i> .
Miscellaneous	Displays miscellaneous record information, such as the format and last template applied to the record.
Created on	System assigned
Last modified on	System assigned.

All lines preceded by a line number can be selected by clicking on them. By clicking on line 1 you return to the bibliographic record. These groups are discussed in section 111.4.3.

Options on the screen

Add/update field(s) using template: Use this option for minor modifications to the bibliographic record. See section 111.4.2.5.

Related searches: Use this option to launch so-called "related searches" for a record. See section 111.4.2.6.

Add/display items: with this option you can add, modify or delete items. See section 111.5.

Delete record: Delete the record. This is only possible when no items and shelfmarks or shelfmark sets, nor orders and/or subscriptions are linked to the record. If the parameter **Delete bib record containing shelfmark(s) with no holdings** in AFO 469 – Miscellaneous is ON, then you will be able to delete a record that still has shelfmark information (but no items, shelfmark sets, orders and/or subscriptions).

Modify search query: to leave the record and return to the search screen. You can then either start a new search or go back to the main menu. When you return to the search screen, the last search term you entered will be retained and you can modify it to adjust your search.

Note

This only works if you have a default setting defined for the initial search screen. E.g. you have entered “star trek” as search string and checked the ‘Save settings’ box. Every time you access an AFO with a bibliographic search form, this search term will appear. Enter another search term, e.g. “christie”. If you select a record from the result list and then use the **Modify search query** option, the search form will still contain the string “christie”. You can now change this to e.g. “agatha christie” and perform a new search. When you leave the record in another way or when you leave the AFO, the search form will revert to the original search string (“star trek” in our example).

Copy record: Copy the bibliographic data of the record to another record. See section 111.4.2.1.

Show errors in description: Show information on errors in the MARC record (only available if there are errors). See section 111.4.2.2.

Performance data: statistics about this record. See the help on AFO 117 for more information on this subject.

Modify technical information: to add certain statuses to the record. See section 111.4.2.3.

Copy record to savelist: to copy the record to a (new or existing) savelist.

Merge record: see the help on AFO’s 114 and 115 for more information on merging records.

Memorise record: to memorise the record and subsequently merge it with another record.

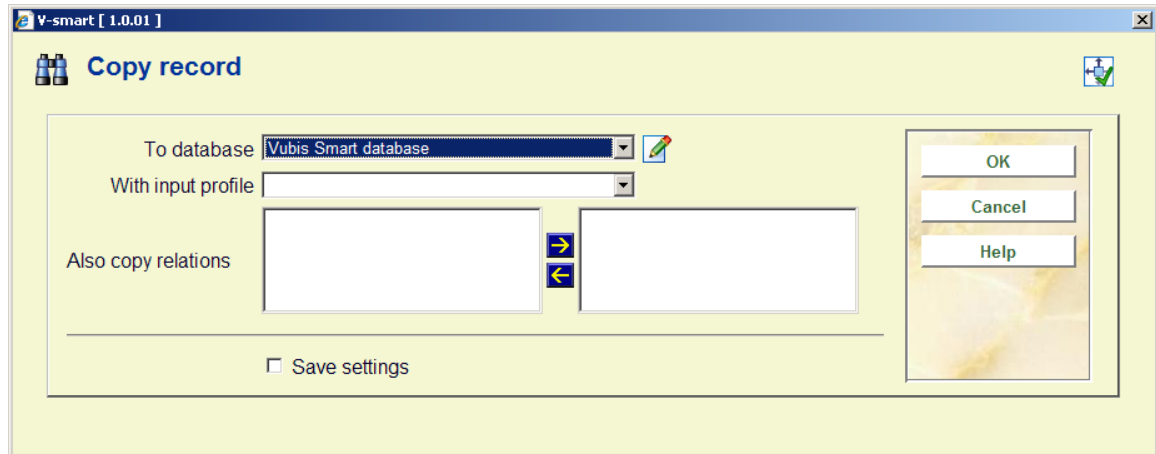
Location(s)/Material type(s): To optionally specify any ‘logical’ locations and/or material types to be used by the restrictions and partial indexes. See section 111.4.2.4.

Z39.50 update: this option is not in use (and will always be inactive).

When your initial search resulted in more than one record and you selected a record from the result list, you can use the **Previous** and **Next** options to browse through the results on a record by record basis (instead of having to go back to the result list to select another record).

111.4.2.1 Copy a record

Copy record: Copy the bibliographic data of the record to another record. After choosing this option an input screen is displayed:



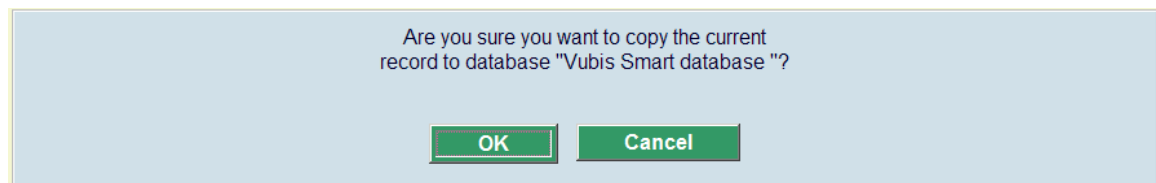
Fields on the screen

To database: choose the correct database from the dropdown list.

With input profile: choose the correct profile from the dropdown list.

Also copy relations: optionally specify which relations must be copied.

the system will ask for confirmation:



After clicking **OK** the system will create a new record. Which data from the current record is copied depends on the chosen profile. These profiles are defined in AFO 133.

Note

Sometimes Z3950 is used to retrieve records with the final purpose to copy them to the local database. If the record has relations to other records, they can also be automatically retrieved and loaded, through the use of LNK fields in conversion profiles.

When the records are retrieved with a Z3950 search, an import conversion profile should be used in which the relations that should be retrieved in case of a copy are stored in LNK fields, very similar to how this is done for the standard loader. The only difference with the standard loader LNK fields is that the \$c does not contain the

name of a local matching profile, but the name of a Z3950 update profile, while the \$d subfield holds the key for the Z3950 search.

For the definition of Z3950 update profiles see:

AFO651 -> Z3950 -> Z3950 Client: Target profiles -> Cataloguing profiles button.

For the definition of Z3950 import profiles see:

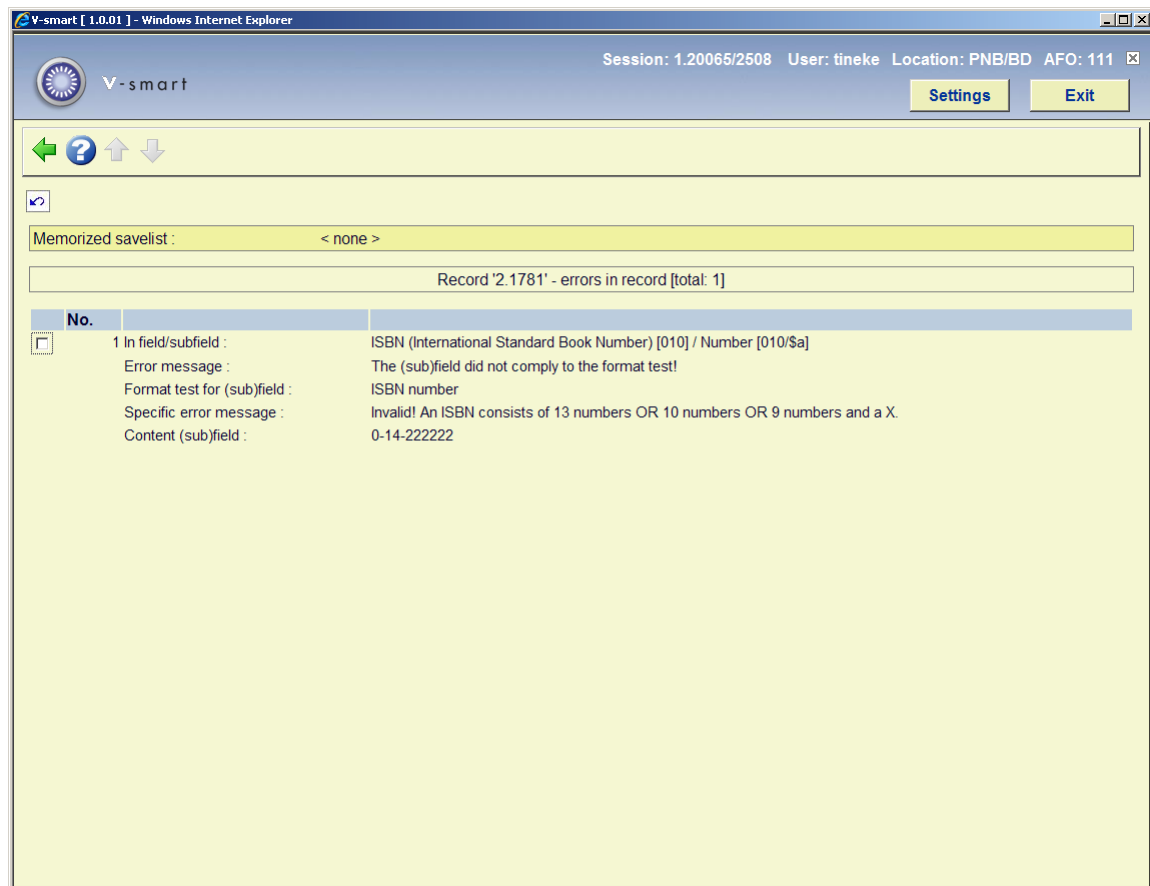
AFO651 -> Z3950 -> Z3950 Client: Databases and Database Groups -> select database.

The record should be copied using an import profile **without** conversion. The user can indicate if relations should be copied as well – in that case, when the record is copied the system will try to retrieve and load the related records with the information in the LNK fields. This is done by using the data harvester logic - no additional setup is required.

111.4.2.2 Show errors in description

When saving a record the system performs a number of checks. Some errors will prevent you from saving the record. Others can be ignored and you can save the record anyway.

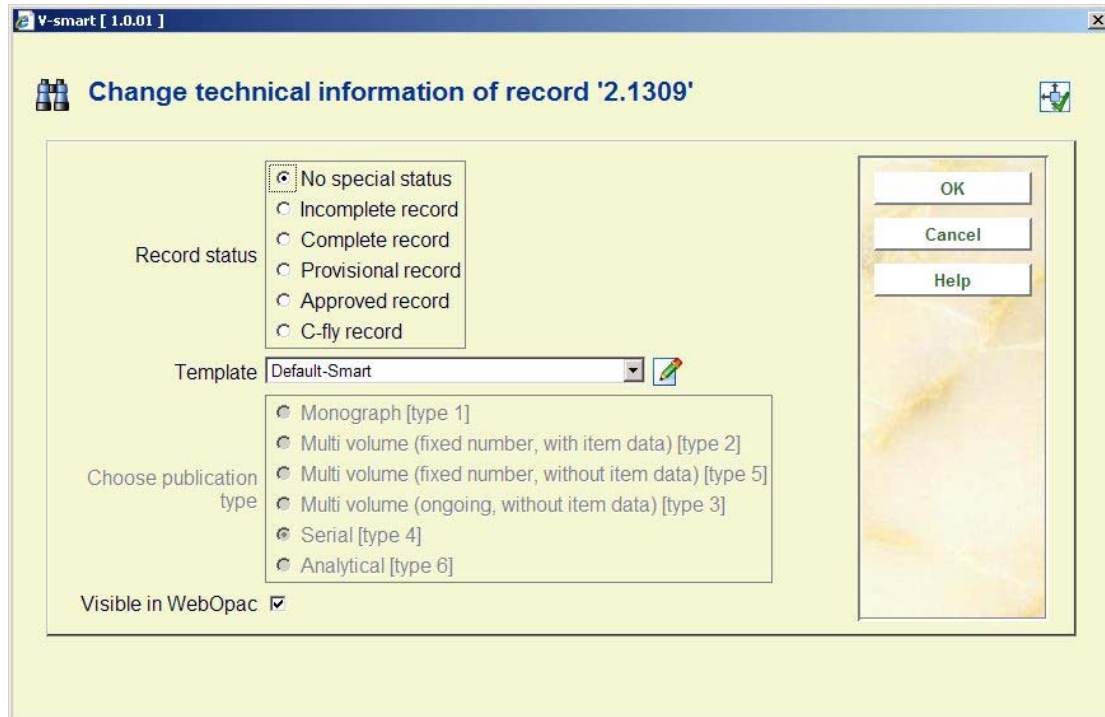
Show errors in description: Show information on errors in the bibliographic record (only available if there are errors). After choosing this option an overview screen with the error(s) will be presented:



This screen is for information purposes only. To correct the error you will have to return to the bibliographic record.

111.4.2.3 Modify technical information

Modify technical information: to add certain statuses to the record. After choosing this option an input screen is displayed:



Fields on the screen

Record status: Select a record status. For example, you can give all new records the status “provisional” until somebody else checks the record and changes the status to “approved”. With the SSP module you can generate reports of records with a certain status. When creating a template you can specify that all fields, also the empty ones, must be redisplayed when modifying the record.

Template: Choose a template from the dropdown list. When creating a template you can specify that for a certain record status this template must be applied when modifying the record.

Choose publication type: Choose the correct publication type. This can only be changed as long as no shelfmarks have been defined for the record.

Note

Depending on the publication type chosen, the system will behave differently when adding shelfmarks and item data. See section 111.6.

Visible in WebOpac: Uncheck this option if you **do not** want the record to be visible in the WebOpac.

There is a separate restriction index on WebOpac visibility. This flag works as a search restriction that is selectable in the staff module, but automatic in the WebOpac. In the WebOpac the use of the restriction is configurable by search profile. That way public profiles can skip records that are not meant to be visible, while staff profiles can still include those records in the search results.

111.4.2.4 Location(s) and Material type(s)

Location(s)/Material type(s): To optionally specify any 'logical' locations and/or material types to be used by the restrictions and partial indexes.

For search restrictions as well as for partial indexing, the system uses extensively the data elements institution/location and material type. These data elements are both attached to "physical" holdings as defined in a shelfmark. The system provides the further ability to add institution/locations and/or material types to individual bibliographic records. This information will then be taken into account for both restrictions and partial index searching. You can add "logical" locations and material types to a bibliographic record by using this option. An input screen will be displayed:

Specify any locations and/or material types to be used by the restrictions and partial indexes. These settings are used on top of defined shelf marks.

Location (s)

- WP WEBOPAC [WP]
- BACKOFFICE [BACK]
- BD [BD]
- BRA [BRA]
- CENTRAL LIBRARY FOR MARC2

Material type(s)

- Annual reports [ANN]
- Audiovisual materials [AVM]
- Bibliographies [BIB]
- bluray [BLURAY]
- Books [BO]

Save settings

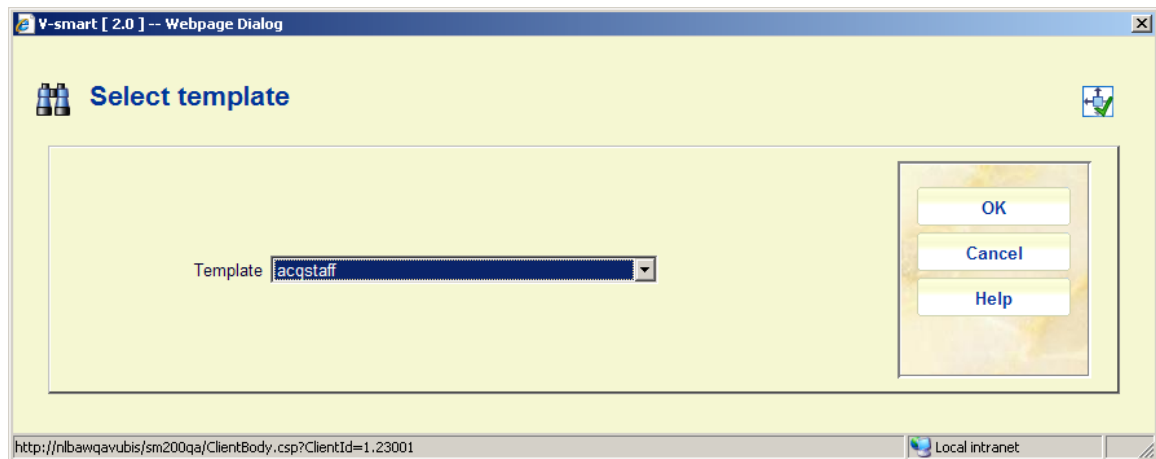
OK
Cancel
Help

Select any location(s) and/or material type(s) by moving them to the right hand side. These settings are used on top of defined shelfmarks.

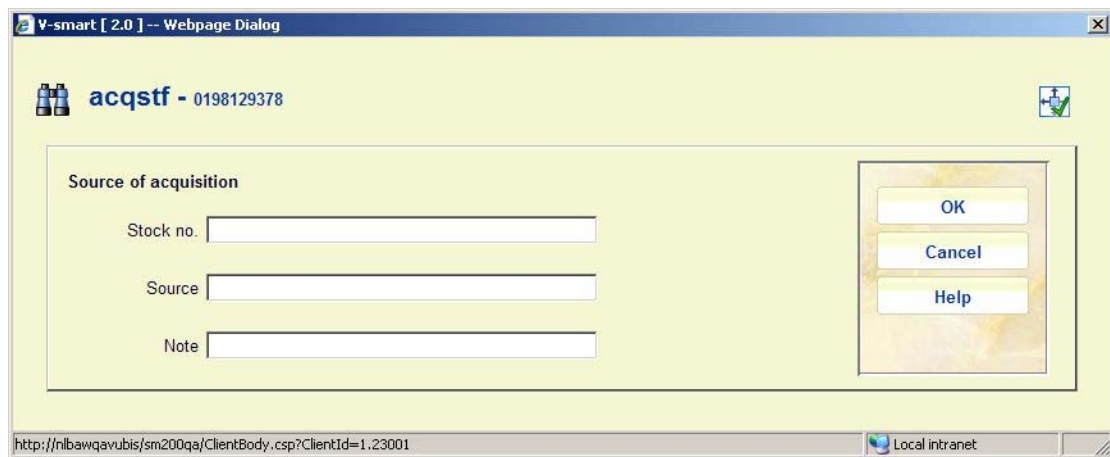
111.4.2.5 Using a simple template**Add/update field(s) using template:** Use this option for minor modifications to the bibliographic record. This is done via a simple template that only displays labels and data entry fields for its subfields. Indicators are hidden. This feature is typically useful for non-cataloguing staff (e.g. acquisitions department) who need to add their own specific information to the record without knowledge of the bibliographic format or other technical details - the data entry form only contains the fields that they need.

In AFO 153 one or more templates may be defined for this purpose.

If multiple templates have been defined, a selection form will be displayed after choosing this option:



After selecting a template (or immediately after choosing this option in case of only one template) the simple input form will be displayed:



Staff can only add or modify data in the defined fields. No new (sub)fields can be added.

If a subfield is linked to an authority list, the field on the form is a dropdown list instead of a text box.

111.4.2.6 Related searches It is possible to launch so-called "related searches" for a record in AFO 111. A list of searches will be proposed, based upon the record contents. Setup parameters determine which indexes are included in the list. If

1. The current record contains a field/subfield used for an index, and
2. This field/subfield is in the list of fields and subfields in use, and
3. The search gives 1 or more results

then the search will be proposed as an entry in the list.

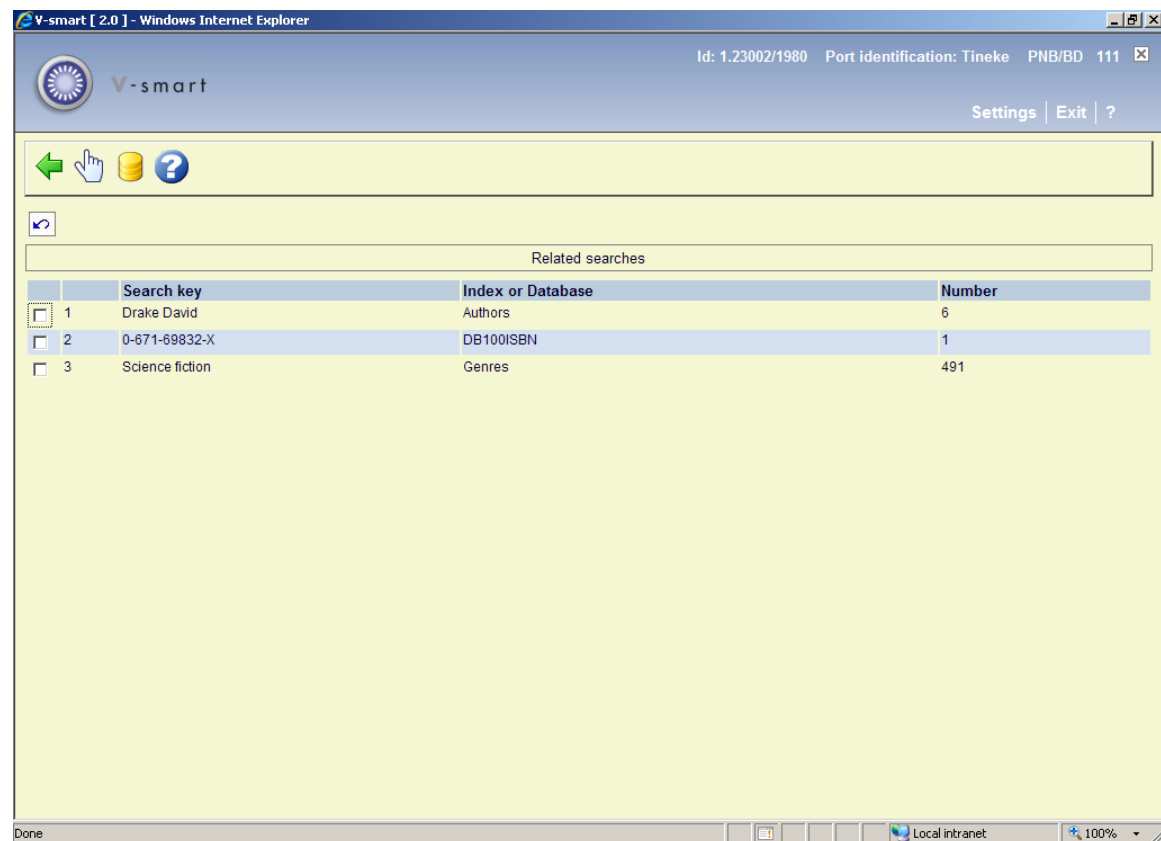
For authority controlled fields a link to the related authority is proposed.

In AFO 651 - Settings for related search you can specify the fields/subfields that you want to use for the index searches, as well as the default namespace for the execution of the related searches.

It is possible to do the related search in another namespace (which can be useful when for instance a potentials database is part of another namespace than the production database).

Finally, when the related search is done, it is possible to see the record details of the results (but no editing of the records is possible here), and you can also obtain statistics about the records that were found, grouped by record status, record type and year of publication.

When you select the option **Related searches** a list of related searches is shown:



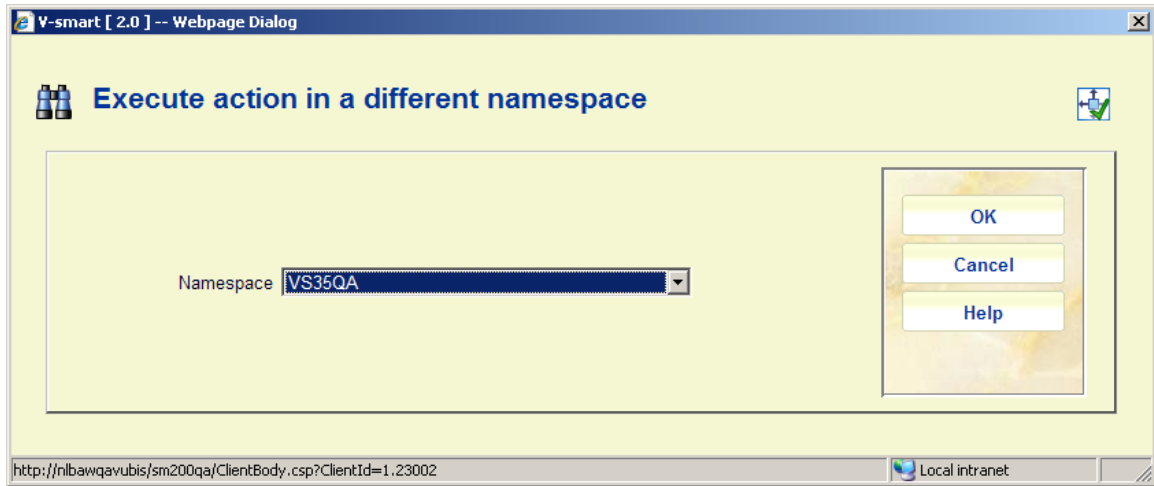
The screenshot shows a web browser window titled "V-smart [2.0] - Windows Internet Explorer". The page header includes the V-smart logo, the text "V-smart", and user information: "Id: 1.23002/1980 Port identification: Tineke PNB/BD 111". There are links for "Settings", "Exit", and "?". Below the header is a navigation bar with icons for back, forward, home, and help. The main content area is titled "Related searches" and contains a table with the following data:

	Search key	Index or Database	Number
<input type="checkbox"/>	1 Drake David	Authors	6
<input type="checkbox"/>	2 0-671-69832-X	DB100ISBN	1
<input type="checkbox"/>	3 Science fiction	Genres	491

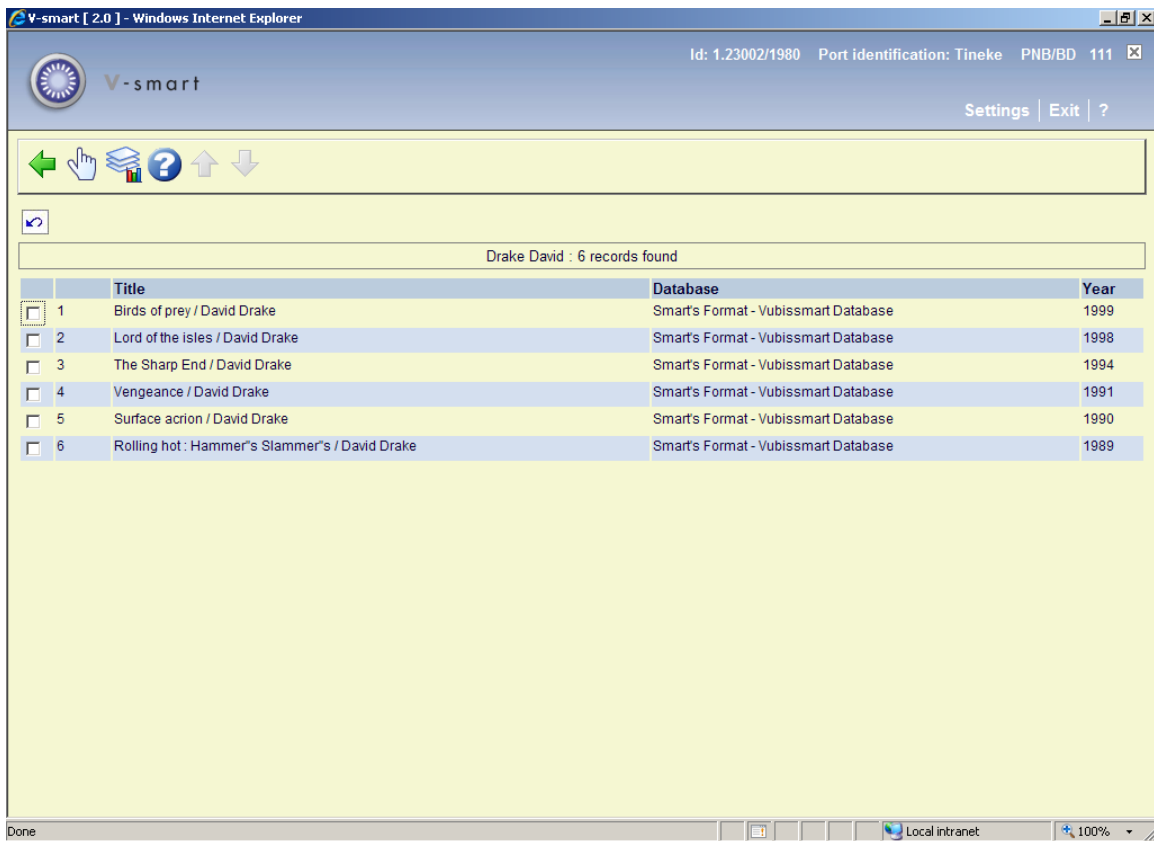
The browser status bar at the bottom shows "Done", "Local intranet", and "100%" zoom level.

Options on the screen

Namespace: This option allows you to execute the related search in a different namespace. A selection form will be displayed:



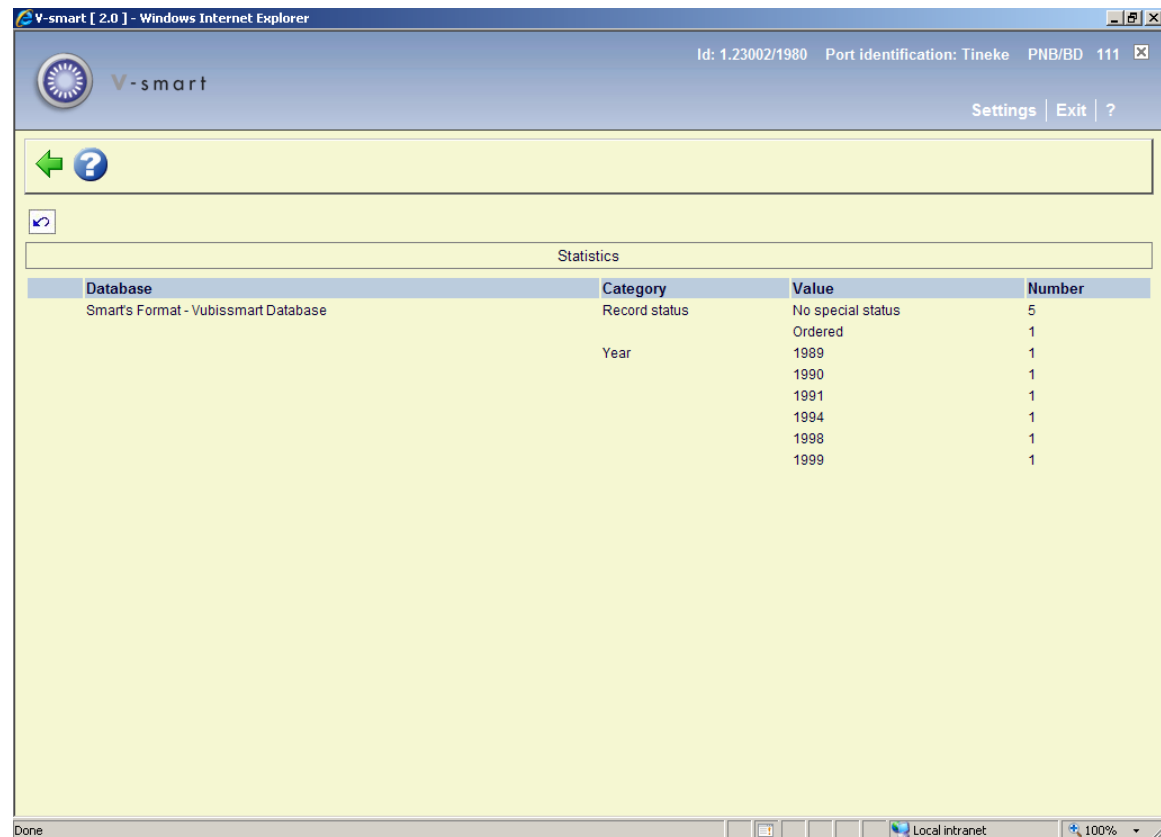
Select: Select a search key and then this option to view the related results. A summary screen will be displayed:



Options on the screen

Select: Select a title and then this option to view the details. The record will be opened in "read-only" mode.

Statistics: This general option gives statistics about the number of records by record status, record type and year of publication:



The screenshot shows a web browser window titled "V-smart [2.0] - Windows Internet Explorer". The page header includes the V-smart logo, the text "V-smart", and user information: "Id: 1.23002/1980 Port identification: Tineke PNB/BD 111". There are links for "Settings", "Exit", and "?". Below the header is a navigation bar with a green arrow and a question mark icon. The main content area is titled "Statistics" and contains a table with the following data:

Database	Category	Value	Number	
Smart's Format - Vubissmart Database	Record status	No special status	5	
		Ordered	1	
	Year	1989	1	
		1990	1	
		1991	1	
		1994	1	
		1998	1	
		1999	1	
		Done		

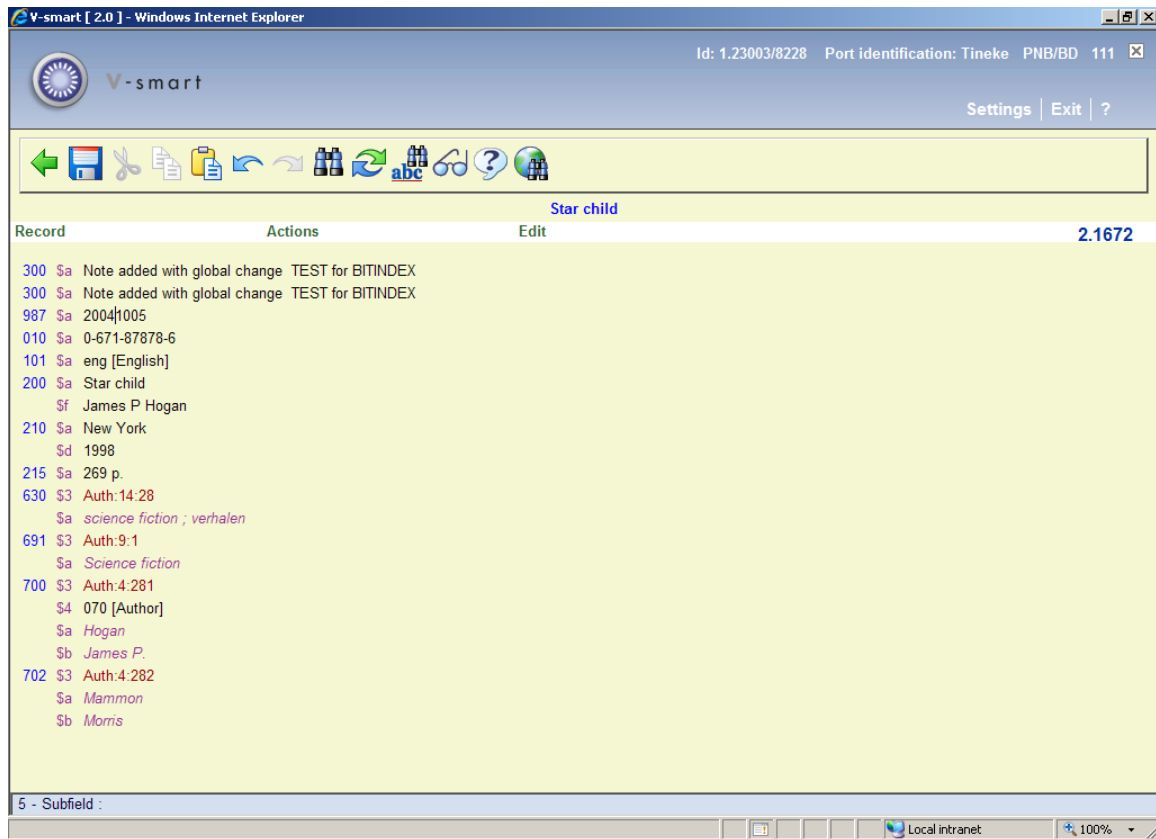
111.4.3 Other blocks on the overview screen

The technical overview screen is divided into various blocks containing one or more lines. Each block is preceded by a line number. You can access these blocks by:

- clicking on the top line of the block
- entering the line number and pressing <enter>

Description

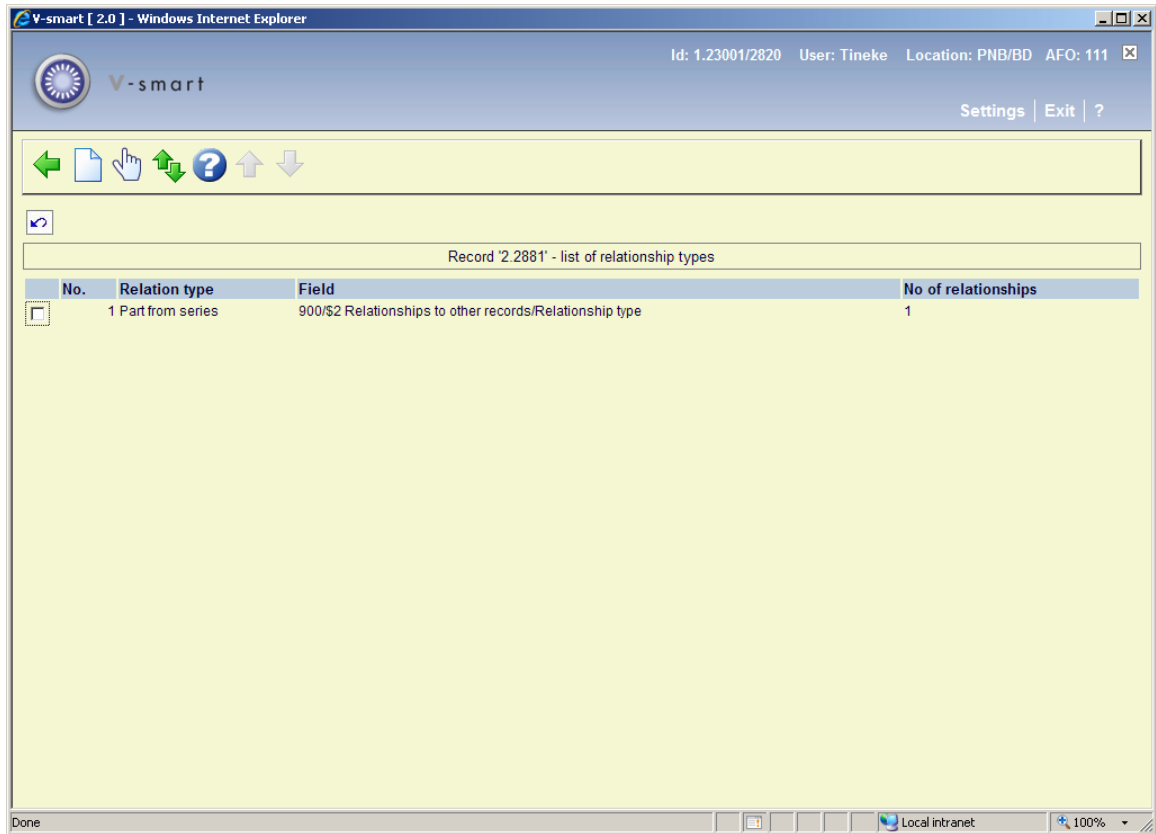
By clicking on line 1 you can open the bibliographic record in the editor window:



Optionally you can display information between the toolbar and the menu in the record editor. This header may contain anything the library likes to display (as long as it fits).and depends on settings in AFO 151 – Format – details of a format – Element/group Profiles. The system will first look for a (site-specific) group/element with id "!EditorTitle". If that is not present the !TitleProper group/element will be used.

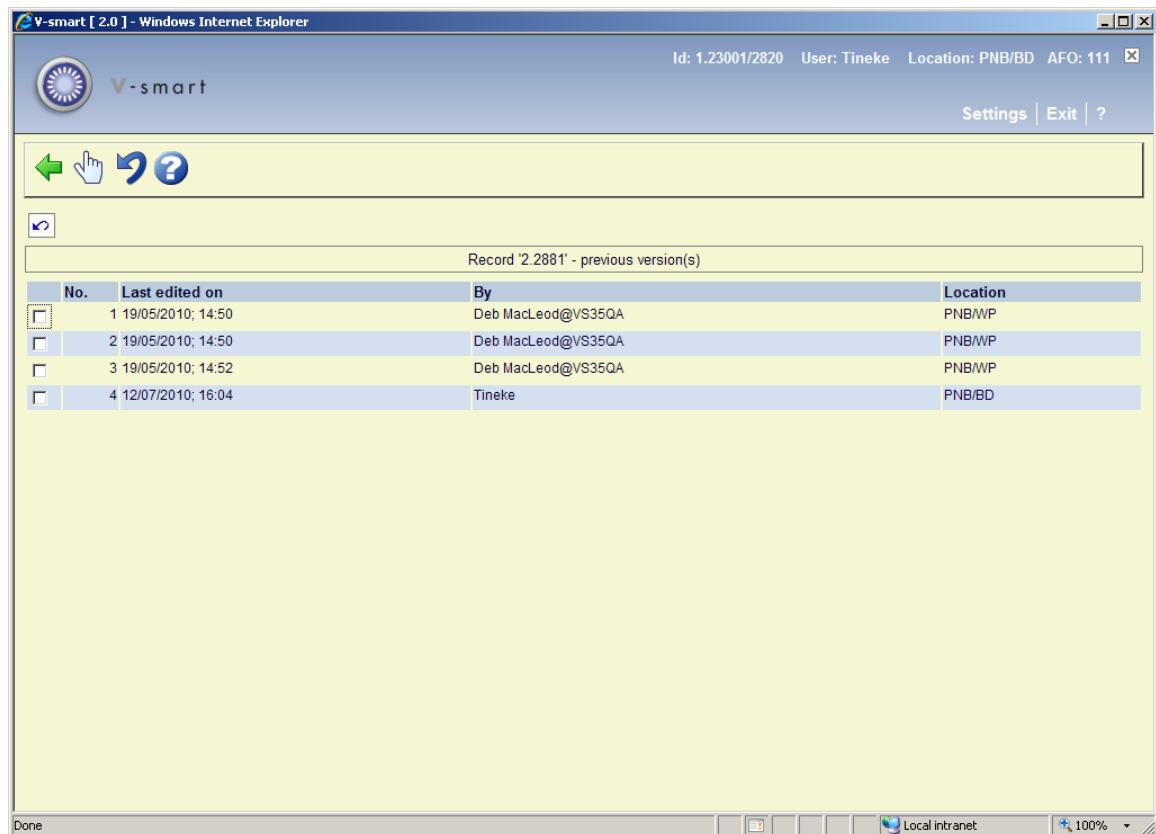
Relationship(s)

If there are relationships with other bibliographic records (e.g. part of a series, with series title) this will be shown here.



Previous version(s)

When modifying a bibliographic record, previous versions can be retained. If this happens and, if yes, how many copies will be retained; is defined by a parameter in AFO 151 – Data dictionary for records – Databases.



From this screen you can look at details of earlier versions and optionally reinstate an earlier version.

Shelfmark(s)

Displays a list of the linked shelfmarks, possibly supplemented by the number of items for each shelfmark. See section 111.5.

Order(s)

In case the acquisitions module is used, information related to orders for this title can be found here. See the help on the acquisitions module for details.

Subscription(s)

In case the serials module is used, information related to subscriptions for this title can be found here. See the help on the serials module for details.

111.5 Shelfmarks and item details

There are two ways to add shelfmarks and item data to a bibliographic record.

111.5.1 Adding item details

This uses the **Add/display items** icon on the overview screen.

1. Search for a title in AFO 111.
2. Choose the **Add/display items** icon on the technical overview screen.
3. The system will display a screen (with all items already linked to this record).

Record type: monograph [type 1]
 Title: Star child / James P Hogan
 Author: Hogan, James P.
 Item info for all shelfmarks

Record '2.1672' - item summary

No	Barcode	Shelfmark	Material type	Impression	Item Data	EH Flag	Availability	Loan Info	Owner
<input type="checkbox"/>	1 399921222	PNB/BD 324	ANN			No	PNB/BD -> PNB/BRA	For loan	PNB/BD
<input type="checkbox"/>	2 39999001006855	PNB/BD 635.123	BO			No	Not trapped : Claimed 18/08/2009 17:41	For loan	PNB/BD
<input type="checkbox"/>	3 3999412	PNB/BD QA1234	FS			No	Not picked up : Discard 09/03/2010 20:20	For loan	PNB/BD
<input type="checkbox"/>	4 3999414	PNB/BD QA1234	FS			No	Missing	For loan	PNB/BD
<input type="checkbox"/>	5 3999416	PNB/BD QA1234	FS (16 - BO)			No	Request in progress at BD RR	For loan	PNB/BD
<input type="checkbox"/>	6 3999417	PNB/BD QA1234	FS			No	Not trapped	For loan	PNB/BD
<input type="checkbox"/>	7 3999418	PNB/BD QA1234	FS			No	Not trapped	For loan	PNB/BD
<input type="checkbox"/>	8 3999419	PNB/BD QA1234	FS			No	Not trapped	For loan	PNB/BD
<input type="checkbox"/>	9 3999420	PNB/BD QA1234	FS			No	Not picked up	For loan	PNB/BD
<input type="checkbox"/>	10 388823232	PNB/BD QA1234	FS			No	PNB/CEN -> PNB/BD	For loan	PNB/BD
<input type="checkbox"/>	11 99008813	PNB/BD Unknown - c-fly	ANN			No	Not trapped	For loan	PNB/BD
<input type="checkbox"/>	12 39999hold1	PNB/BD [DEBS] qa1234	LAW			No	Not picked up : Discard 09/03/2010 20:20	Refer. only	PNB/BD
<input type="checkbox"/>	13 39999hold2	PNB/BD [DEBS] qa1234	LAW (1 - MISC)			No	Not picked up	Refer. only	PNB/BD
<input type="checkbox"/>	14 3999211111	PNB/BD [JF1] QA234567	ANN			No	Not trapped	For loan	PNB/BD
<input type="checkbox"/>	15 39999326544	PNB/BD [JF1] QA234567	ANN			No	Not trapped	For loan	PNB/BD
<input type="checkbox"/>	16 39999421	PNB/BD qa1234	BO			No	PNB/BD -> PNB/BRA	For loan	PNB/BD
<input type="checkbox"/>	17 3999415	PNB/CEN QA1234	BO			No	Not trapped	For loan	PNB/BD

Columns on the screen

Barcode: the item barcode (this can be a negative number in case a dummy barcode was created for a reservation on an on-order title).

Shelfmark: (current) including institution, location, sublocation, shelfmark prefix, classification, cutter, shelfmark, shelfmark suffix and barcode.

Material type: the material type for each item.

Impression: optional listing of imprint details.

Item Data: optional free text field.

EH Flag: Yes or No – to denote whether or not tag 856 details exist for this item

Availability: whether the item is in the library or the due date (or any special status).

Loan info: whether or not the item is for loan.

Owner: the owning institution/location of the item. This may be different from the shelfmark institution/location when the item is at a different managing location.

Options on the screen

New item detail: to add an item. See section 111.5.1.1.

Modify item detail: select an item and then this option to modify its details – the system will show the Item Detail screen.

Change inst./location: to display items of another institution/location (the system can be configured in such a way that only the items of the current institution/location are shown initially).

Delete item detail: select an item and then this option to delete it.

Delete all items: Use this options to delete all items in a single action.

111.5.1.1 Add a new item

New item detail: to add an item. After choosing this option an input form will be displayed. The details shown on this screen are dependant on parameter settings in AFO 469 – Item Management Parameters –Data to be entered.

Enter a new item

Barcode

Institution

Location code

Sublocation code

Shelfmark classification

Shelfmark algorithm

Item category

Statistical category

Attachment

Cost

Purchase order number/item number

Circulating Stock

Inventory number

Loan status

SWAN date last processed

SWAN original cost

OK
Cancel
Help
Generate S.
Search S.
Gen. inv. no
Clear loan status
Auto item BC

http://nlbawqavubis/sm200qa/ClientBody.csp?ClientId=1.23003 Local intranet

Barcode and at least one of **Sublocation code** or **Shelfmark classification** are mandatory. You must choose the correct **Item category** from the dropdown list. Entering data in the other fields is optional. The field **Purchase order number** is filled automatically by the system if there is an order linked to this record.

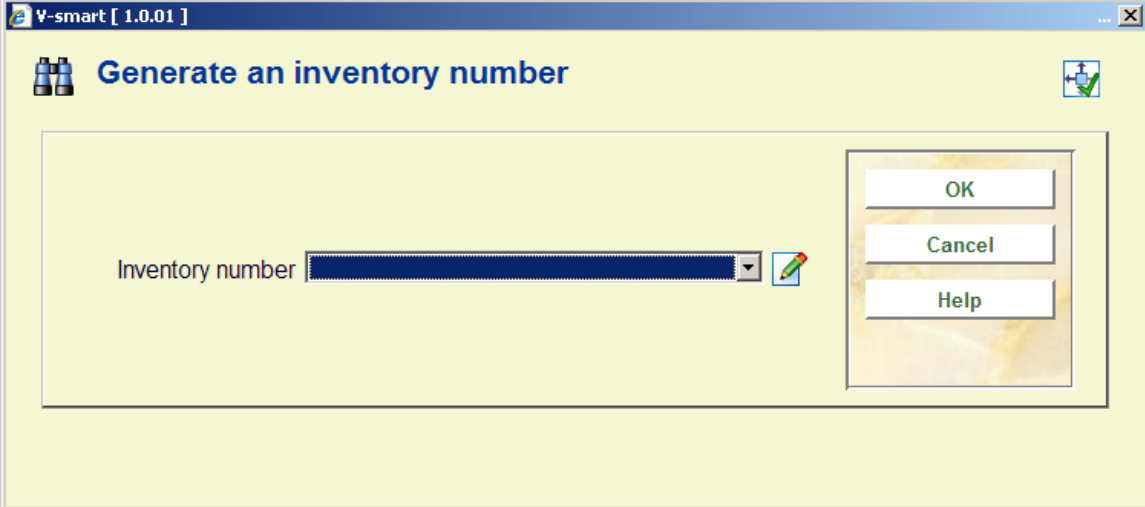
When a custom barcode format has been defined in AFO 651 – Custom barcodes for automatic barcode generation, you can use the button **Auto item BC**. In that case the system will redisplay the form with the automatically assigned barcode:

Barcode

When adding a new item you can place a [(square bracket) in front of the barcode number. This ensures the new item will not be counted as “new” for SDI. This only applies to entering the original barcode, for any subsequent barcodes for the same item a [will be stored as data (if it passes an edit check). For SSP such a barcode would also still be counted as a “new” entry. So if you have ordered a new copy of an existing title (to replace lost or damaged copies) and you want to suppress these from being processed as new titles for SDI, (they are not new titles) then add the new copies with the [barcode - SDI will not see these new items as new titles now available.

Your system administrator may have set a Default shelfmark algorithm in AFO 469. If this is the case, the system will default the shelfmark based on the Default shelfmark algorithm. To generate a shelfmark using the shelfmark algorithm click on the **Generate S** button. A summary screen with shelfmark algorithms is displayed from which you can choose the correct one. You can also use the **Search S.** button. This will result in a summary screen with existing shelfmarks from which you can choose the correct one. You can modify the default data entered in this way.

The Inventory number field on these forms is protected (you are not allowed to enter data into this field directly). You must use the **Gen. inv. no** button to generate an inventory number, an input form will be displayed:



The screenshot shows a window titled "V-smart [1.0.01]" with a sub-title "Generate an inventory number". The window contains a text input field labeled "Inventory number" with a dropdown arrow and a pencil icon to its right. To the right of the input field is a panel with three buttons: "OK", "Cancel", and "Help".

Inventory number – dropdown list of inventory number range codes as defined in AFO 469 – Inventory number ranges. You can choose an entry from the list, type in a free text number or leave the field empty. If the entry is from the list, the system generates the next number in the selected range. If the entry is not a code or is a duplicate (already found in the index), the system will display a warning.

You can optionally add a note when adding an inventory number. When entering in a new inventory number, add '.-' (period minus sign) followed by the note. This will generate the next inventory number and add the note field to the end of the generated number.

When you click **OK** on this form, the system returns to the add/update form with the new inventory number.

The Loan status field on these forms is protected (it contains the default status as defined in AFO 469 – Miscellaneous). You must use the **Clear loan status** button if you want to clear this status.

Please note

The **Generate S**, **Gen. inv. no** and **Clear loan status** buttons will only appear if the respective fields are defined in AFO 469 – Data to be entered, Data to be corrected.

After clicking **OK** on the Enter a new item form, the overview screen of the item will be displayed:

The screenshot shows a web browser window titled 'V-smart [2.0] - Windows Internet Explorer'. The page header includes 'Id: 1.23002/1980', 'Port identification: Tineke', and 'PNB/BD 111'. The main content area displays the following item details:

Title	Conversations at Curlow Creek / David Malouf / Malouf, David
Shelfmark	[PNB] BD 123FIC {BO}
Date added	28/05/2010 Tineke
Date updated	-
Owner	PNB/BD 123FIC {16 - BO}
Manager	PNB/BD
Status	In the library
Last loan	-
Last renewal	-
Due date	-
Last return	-
No. reservations	-(current)
Loan history	-

Below the details, there is a section titled 'Item detail entry - Item: 2010039' with several expandable sections:

- 1 Barcode**: 2010039
- 2 Location**: Shelfmark PNB BD 123FIC, Shelfmark algorithm !Default
- 3 Miscellaneous**: Item Category 16 - BO : Books, Statistical Category 1 - Volw non-fictie, CirculatingStock, Pending item category --, Suppress from WebOpac flag No, Loan and return via SelfCheck not permitted, C-fly indicator No
- 4 Notes**: Action Notes
- 5 Electronic holdings**

The top half of the screen contains all kinds of information about the item. This information is generated by the system and cannot be changed (protected field). The information in the bottom half of the screen can (in certain cases) be modified.

Fields on the screen

Title: the item's title.

Shelfmark: the shelfmark for the item displayed in the form [Institution] Location [Sublocation] Shelfmark.

Date added: the date on which the item was added to the catalogue.

Date updated: the date on which the item data was last modified.

Owner: the code for the Location Manager that owns the item.

Manager: - the code for the Location Manager that is currently managing the item

Note

For example, if the item has been sent to another branch to satisfy a reservation, that branch's Location Manager code will be shown here.

Status: the item's status. V-smart uses the following statuses:

- In the library
- Out on loan - the due date will be displayed in the Due date field.
- Reservation available for pickup - the item is awaiting pickup at the Manager location.
- In transit from Institution/Location to Institution/Location - the item is on its way from the first location to the second location.
- Being transferred from Institution/Location to Institution/Location - the item is due to move from the first location to the second location but has not left the first library yet.
- Reservation - not trapped - the item is on the library shelf but has not been trapped for the reservation. If the reservation is on the shelf and not trapped it will also be on a Picklist.

Note

In addition to the statuses assigned by the system, you can also assign a variety of items to an item, for example: 'missing', 'at binder's', 'to cataloguing department', 'temporarily removed from collection', 'to repair department', et cetera. The status can be assigned using AFO 462 and AFO 463.

Last loan: shows the date on which the item was lent, followed by the name of the borrower and their barcode number. If the item was never checked out, this field will be empty.

Note

This information is changed as soon as the item is checked out.

Due date: the date the item is due for return if it is out on loan. If the item is not on loan, this field will be empty.

Last return: shows the date on which the item was last returned, the time and the location. This information disappears when the item is checked out again. If the item was never checked in, this field will be empty.

Note

This information is changed as soon as the item is checked out.

Previous loans: this field contains previous loans, where the borrower's name is replaced by *****. A parameter determines how many previous loans will be displayed. If the item was never checked out, this field will be empty.

No. reservations: the number of current reservations. If there are no reservations, this field will be empty.

Loan history.: the following information is displayed separated by forward slashes (/):

- the total number of loans to date.
- the number of loans in the current year.
- the total number of reservations to date

111.5.1.2 Options on the screen

from this overview screen you have the options described below. For more details on all of them, see the help for AFO 423.

Note

When there is a transaction for an item and/or you are not the owner of the item, it is not possible to modify certain item.

Options on the screen

Select a group and click the top line. If allowed, you can make changes to the item data. See section 423.4.1.

Copy: copy the item information to a new item record. See section 423.4.2.

Copy multiple: copy the item information to add multiple new item records. See section 423.4.2.

Delete: delete the item record. This can only be done when there are no transactions and you are the owner.

Item status history: to display an overview of the various statuses assigned to the item.

Min/max screen: this option has no function in V-smart.

Modify status: to change the item status. See section 423.4.3.

Borrower: details of the current borrower who has the item on loan, as in AFO 431.

Recall: used to trigger a (manual) recall notice.

Do not recall: do not recall this item if automatic recall is used.

Loans: displays total number of loans for the item, loans this year and loans in previous years.

Current item transfer information: details of when the item was currently transferred from where and where to. See section 423.4.4.

Title transfer history: when the item was sent, where to and how often it was sent in the past. See section 423.4.4.

Sublocation administration information: only available if you use sublocation administration.

Reservations queue: This option takes you to the reservations queue as in AFO 422. Only available if there are outstanding reservations for the item.

Return floating stock: Use this option to 'return' one of your items that was elsewhere as floating stock. The system will update the end date of this item's collection to today's date. Standard procedures for sending back items in an overdue collection will prompt the manager location to send the item back to the owner using AFO 462/463.

Export savelist: With this option you can generate a special savelist which can then be used to compare with items on the shelves (stocktaking). See the help of AFO 424 for an introduction.

111.5.2 Add shelfmark

This option uses the block **Shelfmark(s)** on the technical overview screen. After selecting this option an input screen will be displayed (if no shelfmarks have been defined) or an overview screen (if shelfmarks have already been defined).

The screenshot shows a web browser window titled "V-smart [2.0] - Windows Internet Explorer". The page header includes the V-smart logo, user information (Id: 1.23001/312, User: Tineke, Location: PNB/BD, AFO: 111), and navigation links (Settings, Exit, ?). Below the header is a toolbar with various icons. The main content area displays record details for a monograph by James P. Hogan. A section titled "List of shelfmarks (for institution/location PNB/BD)" contains a table with the following data:

No.	Type	Shelfmark	Copies
<input type="checkbox"/>	1 ANN	BD 324	1 copy
<input type="checkbox"/>	2 BO	BD 635.123	1 copy
<input type="checkbox"/>	3 FS	BD QA1234	8 copies
<input type="checkbox"/>	4 ANN	BD Unknown - c-fly	1 copy
<input type="checkbox"/>	5 LAW	BD [DEBS] qa1234	2 copies
<input type="checkbox"/>	6 ANN	BD [JF 1] QA234567	2 copies
<input type="checkbox"/>	7 BO	BD qa1234	1 copy
<input type="checkbox"/>	8 BO	CEN QA1234	1 copy
<input type="checkbox"/>	9 ANN	CEN [MAG] 321	1 copy
<input type="checkbox"/>	10 BO	SCH qa1234	2 copies

Columns on the screen

Type: the materials types of the items belonging to this shelfmark.

Shelfmark: the complete shelfmark of the items belonging to this shelfmark.

Copies: the number of copies linked to this shelfmark.

Options on the screen

Add shelfmark: select his option to create a new shelfmark. See section 111.5.2.1.

Select no. (+): select a shelfmark and then this option to modify its details.

Delete no. (+): select a shelfmark and then this option to delete it. This can only be done when there are not items linked to the shelfmark.

Change material type (+):select a shelfmark and then this option to modify the material type. A dropdown list of valid material types is offered

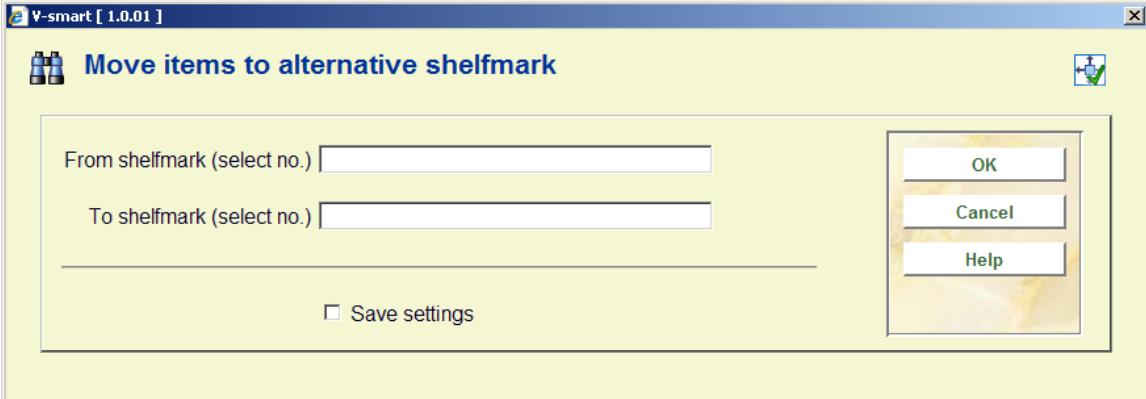
Note

This changes the material type of ALL items linked to this shelfmark.

Change inst./location: to display items of another institution/location (the system can be configured in such a way that only the items of the current institution/location are shown initially).

Change publication type: this option is only available in certain circumstances.

Move items to alternative shelfmark: when there are multiple shelfmarks, you can move items from one existing shelfmark to another. After choosing this option an input form is displayed:



The screenshot shows a dialog box titled "Move items to alternative shelfmark" from the V-smart 1.0.01 application. The dialog has a light yellow background and a blue title bar. It contains two text input fields: "From shelfmark (select no.)" and "To shelfmark (select no.)". Below these fields is a horizontal line and a checkbox labeled "Save settings". On the right side of the dialog, there is a vertical stack of three buttons: "OK", "Cancel", and "Help". A small icon of a book with a checkmark is visible in the top right corner of the dialog area.

Enter the line numbers of the shelfmark from which you are moving and the shelfmark to which you are moving the items.

Note

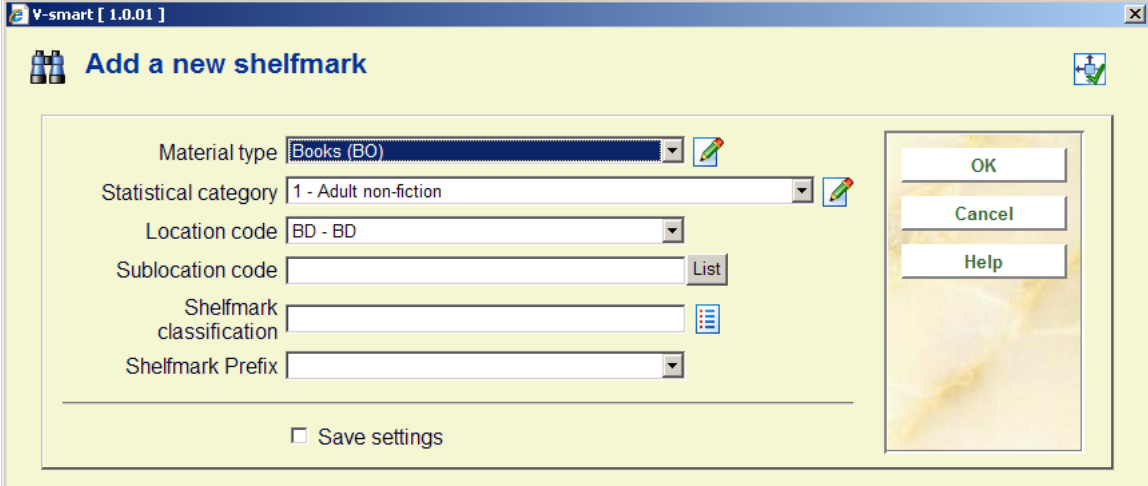
You will be moving ALL linked copies of that shelfmark to the new shelfmark.

Move shelfmarks to alternative bib: select this option to move a shelfmark and the associated items/holdings to a different bibliographic record. See section 111.5.2.2.

Change holdings type: use this option to change the holdings of a single-part title to a serial/multipart structure or a serial/multipart title to a single-part structure. See section 111.5.2.3.

111.5.2.1 New shelfmark

Add shelfmark: select this option to create a new shelfmark. After choosing this option an input form will be displayed:



The screenshot shows a dialog box titled "Add a new shelfmark" from the V-smart 1.0.01 application. The dialog has a light green background and a blue title bar. It contains several input fields and buttons. The fields are: "Material type" (Books (BO)), "Statistical category" (1 - Adult non-fiction), "Location code" (BD - BD), "Sublocation code" (empty), "Shelfmark classification" (empty), and "Shelfmark Prefix" (empty). There is a "List" button next to the "Sublocation code" field and a "Save settings" checkbox at the bottom. On the right side, there are three buttons: "OK", "Cancel", and "Help".

At least one of **Sublocation code** or **Shelfmark classification** are mandatory. You must choose the correct **Material type** and **Location code** from the dropdown list.

After clicking **OK** the standard screen for adding items is offered. See section 111.5.1.1 for more details on how to do this.

Note

It is not mandatory to add an item. It is possible to define a shelfmark to which no item barcodes are linked.

111.5.2.2 Move shelfmarks to alternative bib

This function allows you to move one or more shelfmark(s) (and their associated holdings) from one bibliographic record to another.

Example: Branch added a shelfmark (and items) to the wrong bibliographic record. Possibly the same title but they added an audio cassette to a book record.

After selecting this option, the system first verifies that the holdings on each of the shelfmarks can be moved. i.e. the items attached to the shelfmark(s) are not on loan, on reservations or in transit.

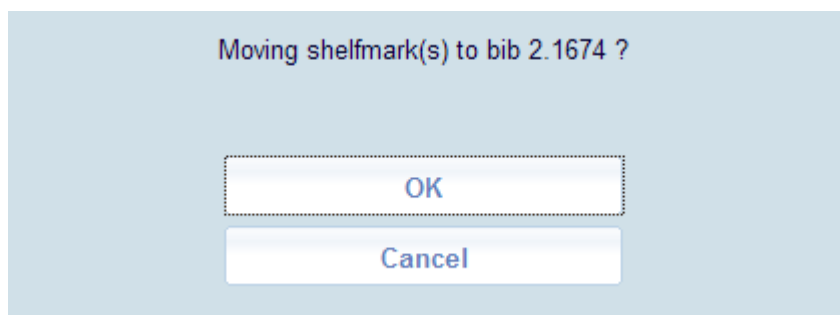
Next the system presents the standard bibliographic search form. Search for the record that you want to move the shelfmarks to:



The screenshot shows a web interface titled "Search for a record to move shelfmark to". It features two tabs: "Standard" (selected) and "System number". The search form includes a "Search expression" text box, a "Select search method" section with radio buttons for "Find" (selected) and "Browse", and a "Select user index" dropdown menu set to "All words". Below these are four more input fields: "Language", "Location", "Material type", and "Visible in WebOpac", each with a list icon on the right. At the bottom left, there is a "Save settings" checkbox which is unchecked. On the right side of the form, there is a vertical column of buttons: "OK", "Cancel", "Help", "Previous", and "New record".

Select the **Memorize** option on the Full record display to indicate that this is the record that you want to move the shelfmarks to. Exit back out of the record and search form.

The system now prompts for confirmation:



The screenshot shows a confirmation dialog box with a light blue background. The text inside reads "Moving shelfmark(s) to bib 2.1674 ?". Below the text are two buttons: "OK" and "Cancel". The "OK" button is highlighted with a dashed border, indicating it is the default or selected option.

After confirmation, the system returns to the original List of Shelfmarks screen and the remaining shelfmark(s) are displayed.

Note

You can only move shelfmarks to another bib record within the same database and of the same publication type.

Items belonging to a shelfmark cannot be moved when they have one of the following statuses: on loan, reserved, in transit, part of exchange collection.

111.5.2.3 Change holdings type

This function allows you to change the holdings of a single-part title to a serial/multipart structure or a serial/multipart title to a single-part structure.

Changing single-part to a serial/multipart structure

AFO111 search for the bibliographic record and select the Shelfmark(s) group from the Full record display.

Record type : monograph [type 1] List of shelfmarks (for institution/location PNB/BD)			
Record '2.3041' - list of shelfmarks			
No.	Type	Shelfmark	Copies
<input type="checkbox"/>	1 BO	BD TVB999	4 copies

On the List of Shelfmarks screen, select the **Change holdings type** option. A selection form is displayed:

V-smart [2.0.01]

Change holdings type

Single-part holdings will be changed to multipart holdings.
The publication type can be changed to the following types:

Choose type

Multi volume (fixed number, with item data) [type 2]
 Serial [type 4]

Each currently barcoded item represents a different volume

OK
Cancel
Help

http://nlbawqavubis/sm200qa/ClientBody.csp?ClientId=1.23009 Local intranet

Fields on the screen

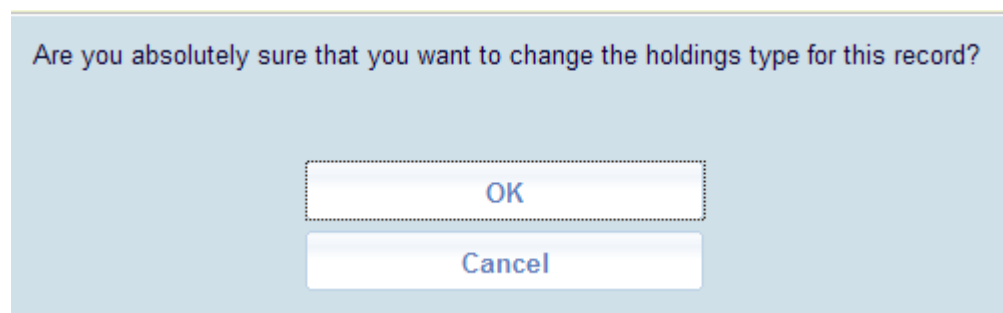
Choose type: the system lists the valid record types that the current bibliographic record can be changed to.

Each currently barcoded item represents a different volume:

If set, each barcoded item will be recreated with a volume number equal to the barcode (thus making each barcode its own distinct volume). At a later time, you can then edit the numbering of each volume and replace the barcode with the correct numbering information.

If not set, every barcoded piece represents the same volume. Only one volume record is created (with a volume equal to one " " (space) character) and all barcoded items will share this same numbering. At a later time, you can then edit the numbering of the volume and replace the space character with the correct numbering information.

After pressing **OK**, the system asks you to confirm your action:



The bibliographic record now contains one shelfmark set containing 4 barcodes (each with its own distinct numbering). The record type has also been changed.

Record type:		multi volume (fixed number, with item data) [type 2]							
Item info for all shelfmarks									
Annotation :		-							
Record '2.3041' - item summary									
No	Barcode	Shelfmark	Material type	Impression	Item Data	EH Flag	Availability	Loan Info	Owner
<input type="checkbox"/>	1 2009187632	PNB/BD TVB999 (v.2009187632)	BO (19 - REF)			No	In the library	Refer. only	PNB/BD
<input type="checkbox"/>	2 200918676723	PNB/BD TVB999 (v.200918676723)	BO			No	In the library	For loan	PNB/BD
<input type="checkbox"/>	3 2009186523	PNB/BD TVB999 (v.2009186523)	BO			No	In the library	For loan	PNB/BD
<input type="checkbox"/>	4 20091863211	PNB/BD TVB999 (v.20091863211)	BO			No	12/06/2009 23:59	For loan	PNB/BD

To change the numbering of each volume, choose the Shelfmark(s) group from the Full record screen. Select the shelfmark and when the Holdings statement for shelfmark sets screen displays, choose the **Add/display issue** option. When the Issue summary screen displays, you can use the **Modify issue** option to change the numbering of the volume.

Changing Serial/multipart title to a single-part structure

AFO111 search for the bibliographic record and select the Shelfmark(s) group from the Full record display.

Record type : multi volume (fixed number, with item data) [type 2]
List of shelfmarks (for institution/location PNB/BD)

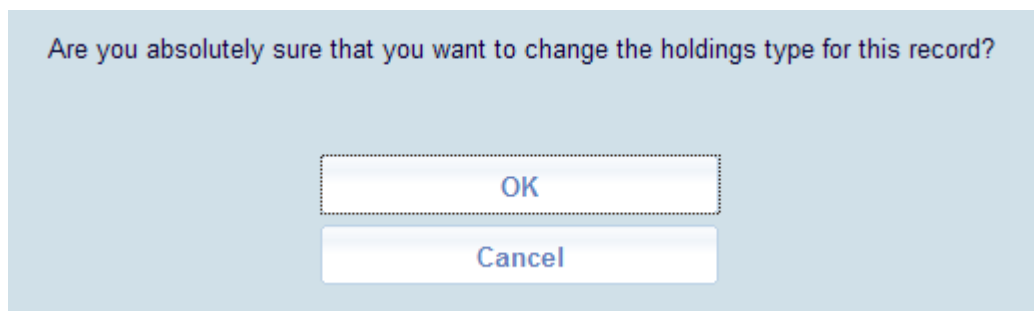
Record '2.3041' - list of shelfmarks

No.	Type	Shelfmark	Sets
<input type="checkbox"/>	1 BO	BD TVB999	1

On the List of Shelfmarks screen, select the Change holdings type option. A selection form is displayed:



After pressing **OK**, the system asks you to confirm your action:



Note

If you answer **OK**, the system will delete any subscription, shelfmark set, volume information, etc. associated with this title.

If you answer **OK**, the bibliographic record now contains one shelfmark containing 4 barcodes. The record type has also been changed.

Record type: monograph [type 1]									
Item info for all shelfmarks									
Record '2.3041' - item summary									
No	Barcode	Shelfmark	Material type	Impression	Item Data	EH Flag	Availability	Loan Info	Owner
<input type="checkbox"/>	1 2009186523	PNB/BD TVB999	BO			No	In the library	For loan	PNB/BD
<input type="checkbox"/>	2 2009187632	PNB/BD TVB999	BO (19 - REF)			No	In the library	Refer. only	PNB/BD
<input type="checkbox"/>	3 20091863211	PNB/BD TVB999	BO			No	12/06/2009 23:59	For loan	PNB/BD
<input type="checkbox"/>	4 200918676723	PNB/BD TVB999	BO			No	In the library	For loan	PNB/BD

111.6 Other publication types

V-smart supports the following publication types:

Type	Description	Remarks
1	Monograph	Monographic publications that consist of one physical volume
2	Multi volume (fixed number, with item data)	The following items are considered limited multiple volume works: any publication that consists of a number of separate individual parts which are published as a unit. That is: a publication that is designed to appear in a specific number of volumes and will eventually be complete. Example: most encyclopaedias.
3	Multi volume (ongoing, without item data)	a group of publications that are linked to one another by the fact that each publication carries the name of the group as a whole in addition to its own individual title. A series consists of a publication designed to be issued as an unlimited number of separate volumes. The series may be numbered or not.
4	Serial	a publication that is published, in printed form or not, in sequential issues or parts, normally arranged in a numerical or chronological sequence, and intended to continue indefinitely. Serial publications include: all periodical publications such as magazines, newspapers, yearbooks, address books and series or reports that appear with less regularity, and records of institutions, and

		congressional debates.
5	Multi volume (fixed number, without item data)	the description of the "main or header"-title of a limited multiple volume work whose separate parts have significant titles.
6	Analytical	Descriptions of publications ('component parts') which require a reference to a host document in their bibliographic identification; analytical descriptions include: articles from magazines, chapters from books, stories taken from collections, musical performances taken from collections, etc. Analytical descriptions are entered as type "6" and can then be linked to other types of publications using hierarchical relations (the 'host document').

Examples

- Type 1: Monograph

Single-volume monographs are: monographic publications that consist of one physical volume. In Vubis they are entered as Type 1 descriptions.

Example

The Assault / Harry Mulisch
The Name of the Rose / Umberto Eco

- Type 2: Multi volume (fixed number, with item data)

Multiple volume monographs are limited multiple volume works with non-significant volume titles. Limited multiple volume works are any publication that consists of a number of individual separate parts that are published as one unit, i.e. any publication that is designed to be published in a specific number of volumes and that will eventually be complete (e.g. most encyclopaedias).

Example:

Winkler Prins Encyclopaedia (22 volumes.)

Colliers Encyclopedia (24 volumes.)

Given that the volume titles are not significant, no separate descriptions are created for them. The volume titles may still be included in the bibliographic or analytical annotation.

Example:

Annotation: Volumes 1-5: Works. - Volumes 6: Register. - Volumes 7-9: Systematic survey

Annotation: Volume 1: Alphabetical list. - Volume 2: Systematic list

- Type 3: Multi volume (ongoing, without item data)

A series is a group of publications linked to one another by the fact that, in addition to its individual title, each publication bears the main title that applies to the entire group. A series consists of an unlimited number of separate publications depending on the design. The series may or may not be numbered.

Example:

Lecture Notes in Economics and Mathematical Systems [= series] 184 : Assignment and Matching Problems : Solution Methods with FORTRAN Programs / Rainer E. Burkard and Ulrich Derigs [= Type 1]

Social Law Series [= series] no 15: Principles of social security for workers / J. The Cock ... [et al.] [= Type 1]

FLA Publications [= series] 18 : Studies in the International Exchange of Publications / ed. by Peter Genzel [= Type 1]

Select Type 3 if the titles for the separate volumes are significant; select Type 4 if this is not the case.

Typical examples of Type 3 are series of monographs. The descriptions entered as Type 3 are the descriptions for the series: the data you enter as part of the series descriptions must apply for all monographs in the series.

The descriptions of monographs in the series are entered as Type 1 (single-volume monographs) or, if applicable, as Type 2 (multi volume monographs) or 5 ("Main or header"-title descriptions).

The descriptions for the series and for a monograph within that series are thus entered separately and then linked using a hierarchical relation.

- Type 4: Serial

Serial publications are publications published in sequential units, whether printed or not, normally arranged in a numeric or chronological sequence and intended to be published indefinitely. Serial publications include: all publications that appear periodically, such as magazines, newspapers, yearbooks, address books (etc.) and series of reports that appear less regularly, as well as institutional debates and congressional records.

Example:

Wall Street Journal

Journal of the American Medical Association

BNTL

Serial publications are entered as Type 4. However, select Type 3 if the titles of the separate volumes are significant (in other words, monograph series are almost never considered as serial publications and are entered as Type 3).

- Type 5: Multi volume (fixed number, without item data)

“Main or header”-title descriptions are descriptions of the comprehensive title for a limited, multi volume work for which the titles of the separate volumes are significant.

Example:

The Path to Freedom / Jean-Paul Sartre [= “Main or header”-title description] Volume 1: The Age of Reason [= Type 1]

*Collected music essays / S. Vestdijk [= “Main or header”-title description]
Volume 1: The first and the last [= Type 1]
Volume 2: Euterpe’s Crack Regiments [= Type 1]
Volume 3: Grandmother’s cupboard [= Type 1]*

If the volumes have non-significant titles, the work is entered as Type 2 (multi volume monographs), except if the parts of have different subject indexing and/or different author records (type 5).

"Main or header"-title descriptions are entered as type 5. The 'type 5' code is thus linked to the parent publication and not to the child publications. The descriptions of the separate volumes that fall under the "Main or header"-title description are entered as Type 1 (single volume monographs) or, if appropriate, as Type 2 (multi volume monographs). The "Main or header"-title description and the descriptions of the separate volumes are thus entered separately and then linked to one another using a hierarchical relation.

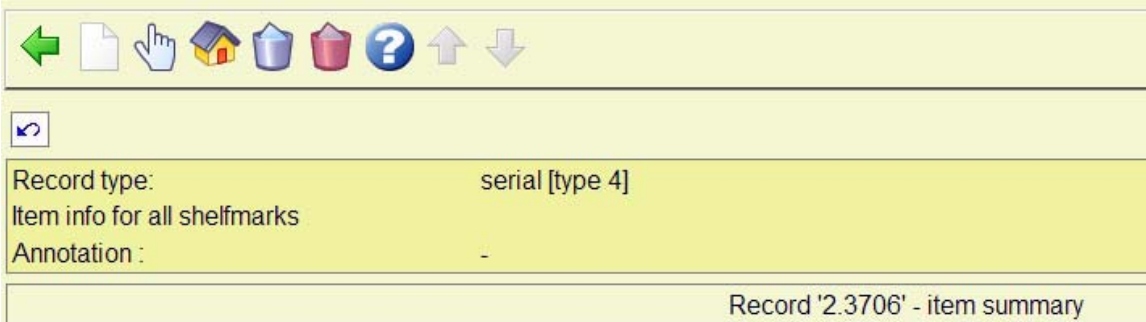
Note

Depending on the publication type chosen, the system will behave differently when adding shelfmarks and item data. In other areas (for instance Reservations) the system also will behave differently depending on publication type.

In the next paragraphs the behaviour of each publication type is discussed briefly.

111.6.1 Publication type 4

When you choose type 4 it is not possible to use the **Add/display items** option to add items. The option **New item details** is not available here:



The screenshot shows a navigation bar with icons for back, home, search, help, and other functions. Below the navigation bar is a record summary table:

Record type:	serial [type 4]
Item info for all shelfmarks	
Annotation :	-

Record '2.3706' - item summary

Later, when items have been added to the volume, additional items can be added via this screen.

111.6.1.1 Holdings statement form

You can however add a shelfmark in the usual way (see section 111.5.2). Next the system will not show the usual add item screen, but a screen like the one below:

Fields on the screen

Description – this field is protected and contains the type of holding description.

System generated holdings – this field is protected and, if the **Automatically generate** flag is set, displays the holdings statement generated by the system.

Retrospective statement – enter a retrospective note summarising what you already hold for this subscription. Enter a carriage return to force a new line within the retrospective statement. This field is optional.

Automatically generate – if checked, the system will automatically build a holdings statement when issues are received, moved to a new location, etc.

Follow up statement - enter a follow up note. Enter a carriage return to force a new line within the follow up statement. This field is optional.

Use for compressed WebOpac display: If you wish to show a retrospective (and/or followup statement) when holdings statements are compressed, you must choose which shelfmark set contains the retrospective statement that you wish to display. You can only set the flag on one shelfmark set for each type of holding (i.e select one shelfmark set for Vols and select a different one for Issues). If you already have the flag set in one shelfmark set and then update the flag in another set (for the same type of holding), the system automatically turns off the flag in the original shelfmark set.

If you are not recording receipts or entering barcodes for this title, you may choose to just enter a statement into the **Retrospective statement** field and press **OK**. The system will

display the contents of the **Retrospective statement** and **Follow up statement** fields in the WebOpac.

BRANCH LIBRARY 1 : REF.123
Vols
v.1-v.4

If you are recording receipts or entering barcodes for this title, you may want to turn on the **Automatically generate** flag so the system will automatically update the holdings statement whenever issues are received.

When the system displays a summary holdings statement it formats it to include the contents of the **Retrospective statement** field, the **System generated holdings** field and the **Follow up statement** field. Each field begins on a new line.

Next the system displays the **Holdings statement for shelfmark sets** screen:

The screenshot shows a web browser window titled "V-smart [1.0.01] - Windows Internet Explorer". The page header includes the V-smart logo, user information (Id: 1.20002/2364, User: tineke, Location: PNB/BD, AFO: 111), and "Settings" and "Exit" buttons. Below the header is a navigation bar with icons for back, forward, search, and other functions. The main content area displays the following information:

Title: Aeronautical journal : an experience [Periodical] -- SmithRichard
ISSN: 00019240
Imprint: UK, 1989 -

Holdings statement for shelfmark sets

No	Shelfmark	Format	Type	OPAC label	Holdings statement	Compressed
<input type="checkbox"/>	1 BD J Journal		Vols	Vols	retro notes	No

One numbered line displays for each shelfmark set consisting of Shelfmark, Format, Type, OPAC label and Holdings statement.

Columns on the screen

Shelfmark – displays the shelfmark including the copy number from the shelfmark set.

Format – displays the physical format assigned in the **Shelfmark set (MARC)**.

Type – displays the **Description** field from the type of holding record.

OPAC label – displays the **OPAC label** field out of the type of holding record.

Holdings statement – multiple line display of holdings information for this shelfmark set. This holdings statement displays to WebOpac users.

Compressed – indicates whether or not the **Use for compressed WebOpac display** flag has been set.

Options on the screen

Add shelfmark set [I] – create a new set for the current shelfmark. The system prompts you to fill in a **Holdings statement** form. If your system has the **Use fixed type of holding in Holdings management** turned on in AFO 469 – Multipart/serials defaults, please refer to section 111.6.1.1. If this option is turned off, please refer to section 111.6.1.2.

Update holdings statement [*] – select one of the shelfmark sets and choose this icon to update the holdings statement. If your system has the **Use fixed type of holding in Holdings management** turned on in AFO 469 – Multipart/serials defaults and if the selected shelfmark set has only one type of holding, the system displays the **Holdings statement** form. Otherwise, you are first asked to select a type of holding from the title's valid list and then the system displays the **Holdings statement** form. Please refer to section 111.6.1.1 for more details on the **Holdings statement** form.

Delete shelfmark set [S*] – select one of the shelfmark sets and choose this icon to delete the shelfmark set. If there are receipts or barcodes attached to this shelfmark set, you are not allowed to delete it. You must choose the **Display receipt info** icon, go to the **Receipt information** screen and delete receipts and barcodes. When you return from deleting the receipt information, you will be allowed to delete the shelfmark set.

Add type of holdings [H*] - select one of the shelfmark sets and choose this icon to add a new type of holding to an existing shelfmark set. This option is turned off if your system has the **Use fixed type of holding in Holdings management** turned on in AFO 469 – Multipart/serials defaults.

Shelfmark set general [G*] - select one of the shelfmark sets and choose this icon to update information about the shelfmark set. This information includes copy number, shelving

information as well as retention, binding and discard information. Please refer to section 111.6.1.3.

Shelfmark set (MARC) [M*] select one of the shelfmark sets and choose this icon to update MARC holdings information about the shelfmark set. This information includes notes. Please refer to section 111.6.1.4.

Display receipt info [R*] - select one of the shelfmark sets and choose this icon to display or delete receipt information. Please refer to section 321.3.4.

Add/display issue [V] – use this option to receive and barcode issues for the current shelfmark. Please refer to section 111.6.1.5.

Edit type of holding [T*] – select one of the shelfmark sets and choose this icon to change the **OPAC label** for the selected type of holding or to toggle the Compress holdings flag. If there is more than one type of holding for the selected shelfmark set, you are first asked to select a type of holding from the shelfmark's valid list and then the system displays the **Update type of holdings** form. Please refer to section 321.4.2.

111.6.1.2 Adding a new holdings statement

If the title is a multi-volume or serial that you are intending to receive through one or more subscription(s), do NOT use this option. Any records created using this option will **not** be available when you add your subscription(s). If the title is for a multi-volume or serial that you are not going to be receiving through Serials control, you can use this option.

If you have the **Use fixed type of holding in Holdings management** turned ON in AFO 469 – Multipart/serials defaults, you will be presented with this screen when you choose the **Add shelfmark set** icon from the **Holdings statement for shelfmark sets** screen:

V-smart [2.0.01]

Holdings statement

Description: Vols - Issues

System generated holdings

Retrospective statement

Automatically generate

Follow up statement

Use for compressed WebOpac display

Annotation

OK

Cancel

Help

http://nlbawqavubis/sm200qa/ClientBody.csp?ClientId=1.23009 Local intranet

The option **Add type of holding** will be inactive in this case.

If you have the **Use fixed type of holding in Holdings management** turned OFF in AFO 469 – Multipart/serials defaults, you will be presented with this screen when you choose the **Add shelfmark set** or **Add type of holding** icons from the **Holdings statement for shelfmark sets** screen.

Add holdings statement

Choose from an existing Type of holding:

OR

Create a new record:

Type

Issue

Index

Supplement

WebOpac label:

Choose a pattern template:

or define your own captions:

	Level1	Level2	Level3	Level4	Level5	Level6	Level7
Enumeration captions	v.	no.	pt.				

	Level1	Level2	Level3	Level4
Chronology captions	(year)	(month)		

Compress holdings

Retrospective statement:

Automatically generate

Follow up statement:

Use for compressed WebOpac display

Annotation:

OK

Cancel

Help

The fields on this form are divided into three sections by a _____ line.

Fields on the screen

Section 1 – allows you to link to a type of holding/publication pattern that already exists on this title:

Choose from an existing Type of holding – this is a dropdown list that contains all of the type of holdings already attached to this title. Check to see if another staff member has already entered the publication pattern information you want. If so, select that entry and proceed to section 3 of this form.

Section 2 – allows you to add a new type of holding/publication pattern to the current title. When you are finished, the new type of holding/publication pattern will be linked to the current shelfmark set and can be used by other staff members when they create other shelfmark sets for this title.

OR

Create a new record: - enter a unique description for the type of holding. The description cannot have been used to describe any other type of holding records on this title.

Type – select one of the three options: issue, index or supplement.

OPAC label – enter the label that displays in the WebOpac for this type of holding.

Choose a pattern template – select a previously defined pattern from the dropdown list of templates. This will give you a set of captions for numbering and chronology, applicable to a specific type of publication (daily, monthly, quarterly, etc.).

or define your own captions – alternatively you can define your own captions for numbering and chronology, specific to the publication you are adding.

Section 3 – allows you to enter information that controls the holdings statement that is produced for this type of holding/publication pattern on this shelfmark set. When creating a summary holdings statement, the system will first display the **Retrospective statement**, then, if the **Automatically generate** statement flag is set, display the **System generated holdings** and then display the **Follow up statement**. See above for more information on the **Use for compressed WebOpac display** field.

Press **OK** to return to the **Holdings statement for shelfmark sets** screen.

111.6.1.3 Shelfmark set general

Select one of the shelfmark sets from the **Holdings statements for shelfmark sets** screen and choose the **Shelfmark set general** icon to update information about the shelfmark set. This information includes copy number, shelving information as well as retention, binding and discard information. The following input form is displayed:

V-smart [1.0.01]

Shelfmark set

Shelfmark

Copy number

Shelving scheme

Shelving order

Shelving title

Copyright article fee code

General retention policy

Specific retention policy type

Specific retention policy no. of units

Specific retention policy unit type

Binding flag

to bind

Binding color

Binding notes

Discard flag

to discard

OK

Cancel

Help

Fields on the screen

Shelfmark – display only. The location of the current shelfmark set.

Copy number – assign a copy number to this set if you have more than one shelfmark set at the current shelfmark. When the system displays the shelfmark set on other screens it will include the copy number in the Shelfmark display. For example, BD REF.123 c.1. refers to MARC21 – 852 \$t, UNIMARC – 200 \$n.

Shelving scheme – refer to the appropriate MARC holdings standard for valid entries. MARC21 – 852/*1, UNIMARC – 200/*1 (*1 indicates first indicator).

Shelving order – refer to the appropriate MARC holdings standard for valid entries. MARC21 – 852/*2, UNIMARC – 200/*2 (*2 indicates second indicator).

Shelving title – enter the title that is used to shelve the item. Refers to MARC21 – 852 \$l, UNIMARC – 200 \$k.

Copyright article fee - .this field contains the unique identification code for component parts appearing in monographs and serials. Refers to MARC21 – 852 \$s, no equivalent in UNIMARC.

General retention policy – enter the general retention policy for the bibliographic item. Refers to MARC21 – 008 position 12, UNIMARC – 102 \$a position 1.

The next three fields make up the specific retention policy. A specific retention policy is defined when the library retains specific parts of the item for a limited time. For example, 11y indicates that the last year of issues is retained.

Specific retention policy type - Refers to MARC21 – 008 position 13, UNIMARC – 102 \$a position 3.

Specific retention policy no. of units - Refers to MARC21 – 008 position 14, UNIMARC – 102 \$a position 4.

Specific retention policy unit type – Refers to MARC21 – 008 position 15, UNIMARC – 102 \$a position 5.

Binding flag – if checked, this indicates that issues in this shelfmark set are to be bound.

to bind – if the **Binding flag** is checked, enter the number of issue to bind in a single volume and when binding should occur. This field is for information purposes only.

Binding color – enter the binding color.

Binding notes – enter any notes specific to the binding process.

Discard flag – if checked, issues in this shelfmark set are to be discarded.

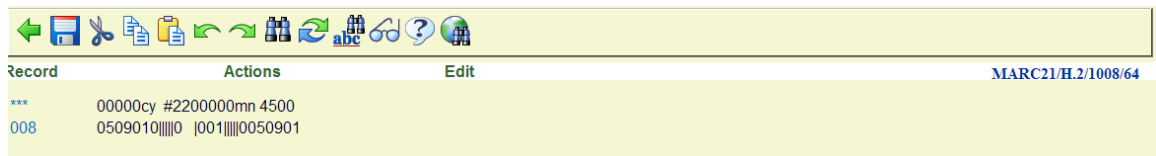
to discard - if the **Discard flag** is set, Indicate the number of issues to be discarded and when discard should occur. This field is for information purposes only.

Note

The three fields: **# issues to bind**, **binding color** and **binding notes** are not related to the fields set up in the Binding general form that can be accessed from a subscriptions general details screen.

111.6.1.4 Shelfmark set MARC

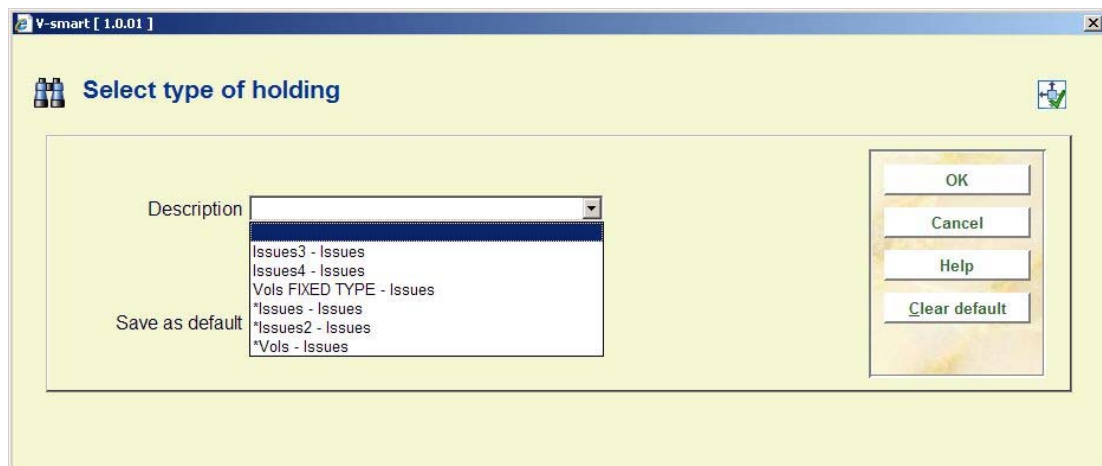
Select one of the shelfmark sets from the **Holdings statements for shelfmark sets** screen and choose the **Shelfmark set (MARC)** icon to update holdings information about the shelfmark set. This information includes copy number, physical format, shelving information, retention policy and notes about the shelfmark set. The system displays the MARC edit form for the shelfmark set. The options are the same as for bibliographic editing but the editing applies to the holdings format (MARC21 or UNIMARC) defined in AFO 159 instead of the bibliographic format.



111.6.1.5 Receiving and barcoding issues

Choose the **Add/display issue** icon from the **Holdings statement for shelfmark sets** screen to receive and barcode issues for the currently selected shelfmark.

If the title has more than one type of holding attached and you have the **Use fixed type of holding in Holdings management** turned on in AFO 469 – Multipart/serials defaults, the system displays the **Select type of holding** form.

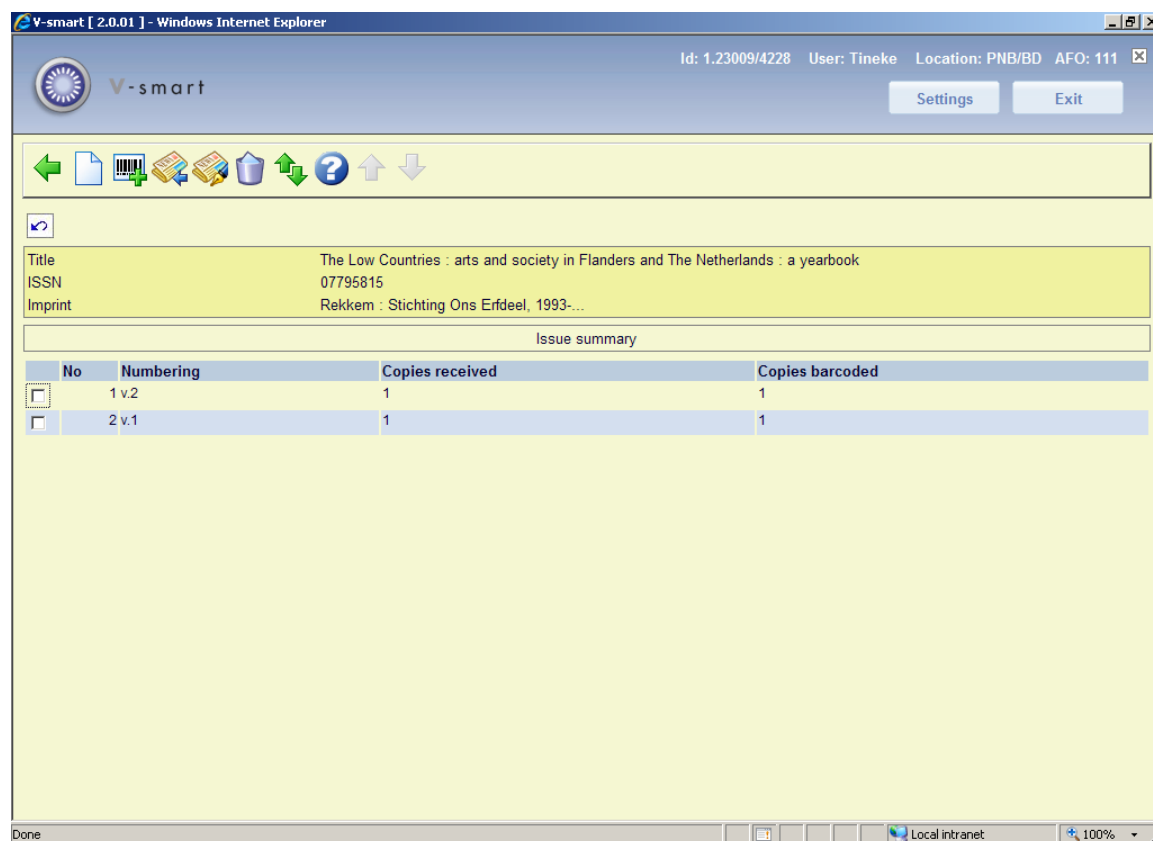


Description – The system displays the type of holdings already created for this title. An asterisk (*) in front of the type of holding indicates that the type of holding is already linked to one or more of the shelfmark sets at this shelfmark. Select one of the type of holdings from the dropdown list.

Save as default: you can check this option to save the value selected from the dropdown list as default. Use the **Clear default** button to reset the default value to 'empty'.

Press **OK** and the system displays the **Issue summary** screen.

The **Issue summary** screen displays one line for each numbered issue for the selected type of holding. The issues listed in the grid are accessible to all shelfmarks on the title. The **Copies received** and **Copies barcoded** columns reflect the status of each issue at the selected shelfmark.



Brief bibliographic data displays above the grid. This data is protected and includes the fields defined in the !Serial element/group profile record.

Below the bibliographic data is a grid containing one row for each issue defined for the selected type of holding.

Columns on the screen

Numbering – enumeration and chronology of the issue.

Copies received – number of copies of this issue received for the selected shelfmark. If the type of holding is attached to subscriptions, you may not receive issues. The copies received column is updated either by Serials check-in or by creating an item barcode. You may enter this screen and find that copies received is greater than copies barcoded. This is because received issues need not necessarily be barcoded.

Copies barcoded – number of copies of this issue barcoded for the selected shelfmark.

Options on the screen

Add issue [I] – use this option if the issue you are receiving is not already listed. This button is disabled if the current type of holding is attached to subscriptions. If enabled, the system displays the Add/modify issue form. Please refer to section 311.3.2.3.

Select for barcoding [*] – select one of the issues and then use this option to receive and barcode that issue for the selected shelfmark. If the issue is already received, the system will just attach a barcode. Use this option to barcode serial issues that were received within the Serials module or to receive and barcode multivolumes. Please see below under Barcoding issues.

Receive issue [R*] – select one of the issues and then use this option to receive (but not barcode) that issue for the selected shelfmark. If the type of holding is attached to subscriptions, you may not receive issues. Please refer to section . Please see below under Barcoding issues .

Modify issue [N*] – select one of the issues and then use this option to change the numbering for the selected issue. . Please refer section 311.3.2.3.



Move issue [M] – use this option to change the order of display issues in the grid. Please refer to section 311.3.5.

Delete issue [D*] - select one of the issues and then use this option to delete the issue. The system will prompt for confirmation. An issue can only be deleted if it is not linked to any shelfmark sets (i.e. has no barcoded item associated with it).

Barcoding issues

Select one of the issues from the **Issue summary** screen and choose the **Select for barcoding** icon. The system displays the **Enter a new item** form.

V-smart [2.0] -- Webpage Dialog

 **Enter a new item** 

Barcode

Institution

Location code

Sublocation code

Shelfmark classification

Shelfmark set

Shelfmark algorithm

Item category

Chronology

Enumeration

Annotation

Statistical category

Attachment

Cost

Purchase order number/item number

Part title

Numbering

Circulating Stock

Bound label

Inventory number

Loan status

SWAN date last processed

SWAN original cost

OK

Cancel

Help


Gen. inv. no

Clear loan status

Auto item BC

<http://nlbawqavubis/sm200qa/ClientBody.csp?ClientId=1.23003> Local intranet

When a custom barcode format has been defined in AFO 651 – Custom barcodes for automatic barcode generation, you can use the button **Auto item BC**. In that case the system will redisplay the form with the automatically assigned barcode:

 **Enter a new item**

Barcode

When adding a new item you can place a [(square bracket) in front of the barcode number. This ensures the new item will not be counted as “new” for SDI. This only applies to entering the original barcode, for any subsequent barcodes for the same

item a [will be stored as data (if it passes an edit check).

For SSP such a barcode would also still be counted as a “new” entry.

So if you have ordered a new copy of an existing title (to replace lost or damaged copies) and you want to suppress these from being processed as new titles for SDI, (they are not new titles) then add the new copies with the [barcode - SDI will not see these new items as new titles now available.

Shelfmark set – this field contains a dropdown list of shelfmark sets (for the current shelfmark) that you can attach this barcode to. For each shelfmark set in the list, the system displays a number (starting at 1 for unique identification purposes) followed by copy number (from the Shelfmark set general form), binding status (i.e. no binding versus binding copy) and receipt status (i.e. not received versus received). The system also includes one entry that is blank. Use this entry to start a new shelfmark set.

For example,

1 - *c.1 - no binding - received
2 - *c.2 - binding copy - not received
3 -

Select 1 if you are barcoding an issue already received in Serials.

Select 2 to receive and barcode the issue that belongs to the binding copy shelfmark set.

Select 3 to receive and barcode the issue for a completely new shelfmark set for the current shelfmark.

The Inventory number field on these forms is protected (you are not allowed to enter data into this field directly). You must use the **Gen. inv. no** button to generate an inventory number, an input form will be displayed:

V-smart [1.0.01]

Generate an inventory number

Inventory number

OK
Cancel
Help

Inventory number – dropdown list of inventory number range codes as defined in AFO 469 – Inventory number ranges. You can choose an entry from the list, type in a free text number or leave the field empty. If the entry is from the list, the system generates the next number in the selected range. If the entry is not a code or is a duplicate (already found in the index), the system will display a warning.

You can optionally add a note when adding an inventory number. When entering in a new inventory number, add ‘.-’ (period minus sign) followed by the note. This will generate the next inventory number and add the note field to the end of the generated number.

The Loan status field on these forms is protected (it contains the default status as defined in AFO 469 – Miscellaneous). You must use the **Clear loan status** button if you want to clear this status.

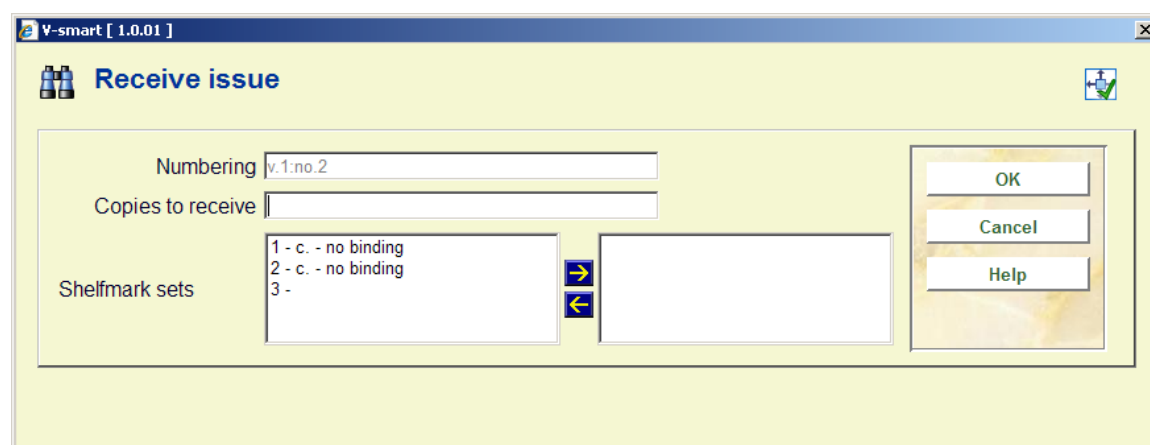
Please note

The **Gen. inv. no** and **Clear loan status** buttons will only appear if the respective fields are defined in AFO 469 – Data to be entered, Data to be corrected.

After entering the barcode, select the correct shelfmark set, item category, etc and press **OK** to create the barcode. If the issue was not previously received, it will now display as both received and barcoded. The system returns to the **Issue summary** screen.

Receive issues

Select one of the issues from the **Issue summary** screen and choose the **Receive issues** icon to receive (but not barcode) the issue. The system displays the **Receive issue** form.



Fields on the screen

Numbering – enumeration and chronology of the issue. Not updateable.

Copies to receive – enter the number of copies of the issue that you are receiving for the current shelfmark.

Shelfmark sets – select which shelfmark sets you want to receive for. The list contains the shelfmark sets for the current shelfmark that have not received this specific issue (i.e. v.3). If a shelfmark set is controlled by a subscription, it does not get included in the list. A blank entry is also included in the list to allow you to receive the issue for a completely new shelfmark set.

For each shelfmark set in the list, the system displays a number (starting at 1 for unique identification purposes) followed by copy number (from the Shelfmark set general form) and binding status (i.e. no binding versus binding copy).

When you press **OK** the system verifies that the value in **Copies to receive** matches the number of shelfmark sets you selected. If no discrepancy is found, the system marks the issue as received on the selected shelfmark sets.

111.6.1.6 List of shelfmarks

Once you have finished adding all information the system returns to the **List of shelfmarks** screen.

The screenshot shows a web browser window titled 'V-smart [1.0.01] - Windows Internet Explorer'. The page header includes 'v-smart', 'Session: 1.20065/2508', 'User: tineke', 'Location: PNB/BD', and 'AFO: 111'. There are 'Settings' and 'Exit' buttons. Below the header is a navigation bar with icons for back, forward, home, search, and refresh. The main content area shows 'Record type : serial [type 4]' and 'List of shelfmarks (for institution/location PNB/BD)'. The title of the list is 'Record '2.1008' - list of shelfmarks'. The list is presented as a table with four columns: 'No.', 'Type', 'Shelfmark', and 'Sets'. Each row has a checkbox in the 'No.' column.

No.	Type	Shelfmark	Sets
<input type="checkbox"/> 1	YB	BD ERGENS	1
<input type="checkbox"/> 2	PER	BD JOURNAL	3
<input type="checkbox"/> 3	YB	BD OPSLAAN	1
<input type="checkbox"/> 4	MAP	BD TUE	0
<input type="checkbox"/> 5	BO	BD Test Aug9	1
<input type="checkbox"/> 6	ANN	BD WIAL	0
<input type="checkbox"/> 7	PER	CEN frances	2
<input type="checkbox"/> 8	PER	CEN serials	1
<input type="checkbox"/> 9	PER	CEN test	1
<input type="checkbox"/> 10	ANN	WP AAAA	0
<input type="checkbox"/> 11	CD	WP DMQA CD COMPLETE SET	0

Columns on the screen

Type: the materials types of the items belonging to this shelfmark.

Shelfmark: the complete shelfmark of the items belonging to this shelfmark.

Sets: the number of sets linked to this shelfmark.

Options on the screen

Add shelfmark [I] - Select this option to add a new shelfmark. Please refer to section 111.6.1.1.

Select no. [*] - Select a shelfmark and then choose this option to update holdings information for this shelfmark. See section 111.6.1.2.

Delete no. [S*] - Select a shelfmark and then choose this option to delete the shelfmark. This can only be done if there are no sets linked to the shelfmark.

Change material type [A*] - Select a shelfmark and then select this option to change the material type. Select the desired answer from the list.

Note

This changes the material type of ALL items linked to this shelfmark.

Change inst./location: to display items of another institution/location (the system can be configured in such a way that only the items of the current institution/location are shown initially).

Change publication type: this option is only available in certain circumstances.

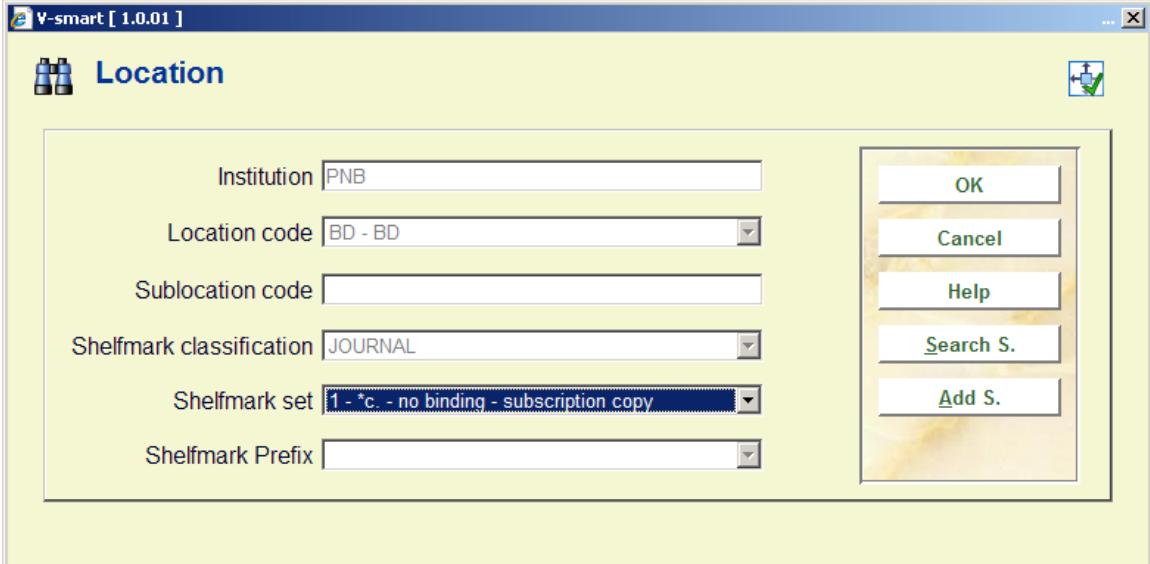
Move items to alternative shelfmark [W] - If you select this option, an input screen appears. In the input field **From shelfmark** enter the number of the line containing the shelfmark whose holdings data you wish to move. In the following input field **To shelfmark**, enter the number of the line containing the shelfmark to which you wish to move the holdings information.

Note

You will be moving ALL linked sets of that shelfmark to the new shelfmark. The shelfmark from which you moved the sets (to which now no sets are linked) is automatically deleted.

111.6.1.7 Moving barcoded issues from one location to another

Select the **Add/display items** icon from the **Full record** screen. The system displays the **Item summary** screen. Select one of the items and the system displays the **Item detail entry** screen. Select the **Location** field and the system responds by displaying the **Location** form.



The screenshot shows a web browser window titled "V-smart [1.0.01]" displaying a "Location" form. The form has a light yellow background and a blue header bar with the title "Location" and a small icon of two bottles. The form contains the following fields and buttons:

- Institution:** Text input field containing "PNB".
- Location code:** Dropdown menu showing "BD - BD".
- Sublocation code:** Empty text input field.
- Shelfmark classification:** Dropdown menu showing "JOURNAL".
- Shelfmark set:** Dropdown menu showing "1 - *c. - no binding - subscription copy".
- Shelfmark Prefix:** Empty dropdown menu.
- Buttons:** A vertical stack of buttons on the right side: "OK", "Cancel", "Help", "Search S.", and "Add S.".

Shelfmark set – displays a dropdown list of shelfmark sets at the current shelfmark that you can move this item to. If the item was received through Serials control, you will only see one shelfmark set in the list. For each shelfmark set in the list, the system displays a number (starting at 1 for unique identification purposes) followed by copy number (from the Shelfmark set general form), binding status (i.e. no binding versus binding copy) and receipt status (i.e. not received versus received). The system may also include one entry that is blank. Use this entry to start a new shelfmark set.

If you wish to move the item to another shelfmark on this title use either the **Search S.** (search shelfmark) or **Add S.** (add shelfmark) button depending on whether the shelfmark you are moving to already exists on the title. Regardless of which option you choose, the system redisplay the **Location** form with the newly selected shelfmark.

V-smart [1.0.01]

Location

Institution PNB

Location code CEN - CENTRAL LIBRARY

Sublocation code

Shelfmark classification serials

Shelfmark set -

Shelfmark Prefix

OK

Cancel

Help

Search S.

Add S.

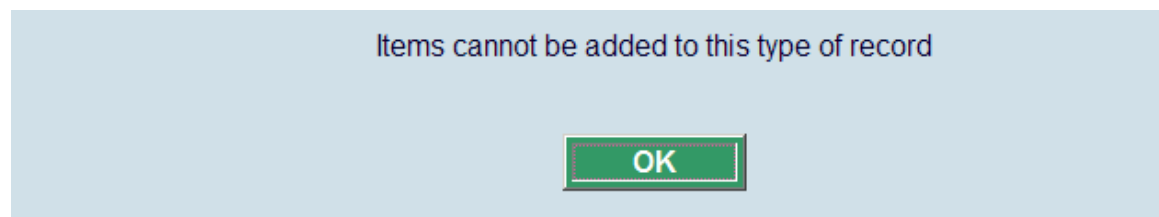
Now press **OK** to move the item to the new shelfmark.

111.6.2 Publication type 2

The system behaves in the same way as with publication type 4.

111.6.3 Publication type 3

When you choose type 3 it is not possible to use the **Add/display items** option to add items. In that case the following message will be displayed:



You can however add a shelfmark in the usual way (see section 111.5.2). Next the system will not show the usual add item screen, but the holdings statement form. See section 111.6.1.1 for more information.

111.6.4 Publication type 5

The system behaves in the same way as with publication type 3.

111.6.5 Publication type 6

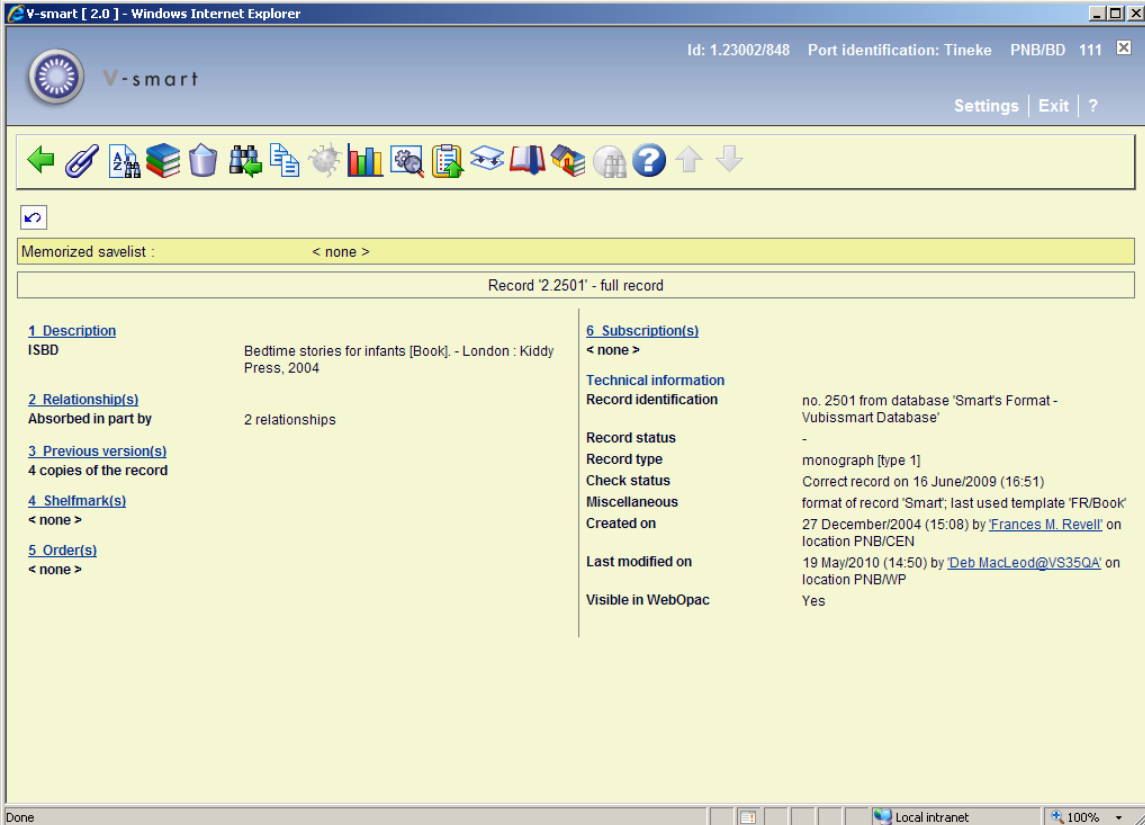
Publication type 6 records form part of analytical cataloguing. They are meant for component parts and therefore you cannot add items to type 6 records. It is possible to set up links between other record types, so you can add items to 'child' records.

See the [general help](#) on analytical cataloguing for more information including setup and examples.

Please note

This functionality is only available for Smart and UniMARC formats. It is not compatible with MARC21.

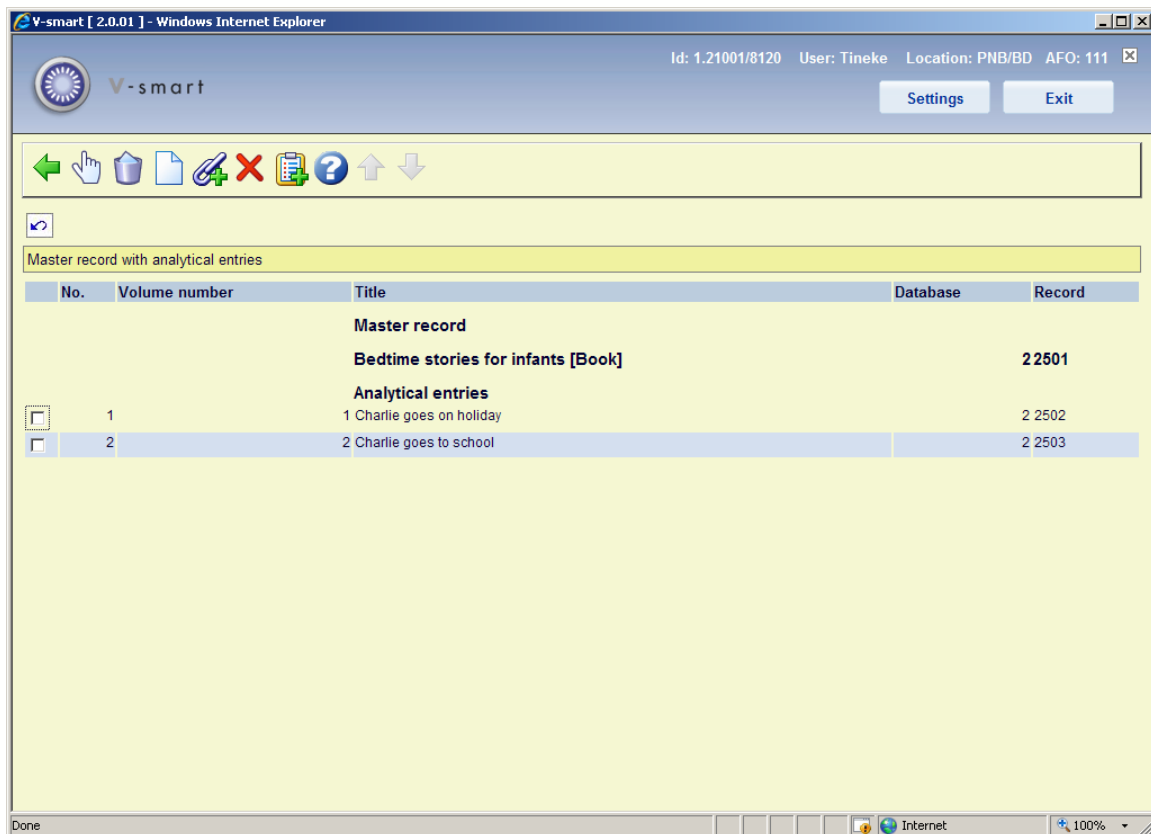
Records that have a link to one or more analytical entries, have an additional option on the overview screen, **Link analytical entries**:



The screenshot shows a web browser window titled "V-smart [2.0] - Windows Internet Explorer". The address bar shows "Id: 1.23002/848 Port identification: Tineke PNB/BD 111". The page content is divided into several sections:

- 1 Description**: ISBD Bedtime stories for infants [Book]. - London : Kiddy Press, 2004
- 2 Relationship(s)**: Absorbed in part by 2 relationships
- 3 Previous version(s)**: 4 copies of the record
- 4 Shelfmark(s)**: < none >
- 5 Order(s)**: < none >
- 6 Subscription(s)**: < none >
- Technical information**:
 - Record identification**: no. 2501 from database 'Smarts Format - Vubissmart Database'
 - Record status**: -
 - Record type**: monograph [type 1]
 - Check status**: Correct record on 16 June/2009 (16:51)
 - Miscellaneous**: format of record 'Smart'; last used template 'FR/Book'
 - Created on**: 27 December/2004 (15:08) by 'Frances M. Revell' on location PNB/CEN
 - Last modified on**: 19 May/2010 (14:50) by 'Deb MacLeod@VS35QA' on location PNB/WP
 - Visible in WebOpac**: Yes

After selecting this option a new screen is displayed:



Options on the screen

Modify: Select a line and then this option to modify the entry. See the sections on adding and linking entries in the [general help](#) on analytical cataloging for more information.

Delete: Select a line and then this option to delete the entry. The system prompts for confirmation.

Add analytics: Use this option to create a new record to be linked to the master. See the [general help](#) on analytical cataloging for more information.

Link existing analytics: Use this option to create a link with an existing record. See the [general help](#) on analytical cataloging for more information.

Delete everything: This action will always delete the master record and it will delete the analytical entries as long as they don't have relations with other bibliographic records; a warning is displayed.

Record to savelist: Select one or more analytical entries and then this option to put them in a savelist.

Note

The option **Link analytical entries** is *only* available for records that are created based on a template that has a link to another template for analytical cataloguing.

- **Document control - Change History**

Version	Date	Change description	Author
1.0	April 2008	creation	
2.0	August 2008	various updates; new option for serials holdings display; new option for WebOpac visibility	
2.1	January 2009	note for inventory number	
3.0	April 2009	new options: delete issue from summary screen, Moving shelfmarks to alternate bib, Changing holdings type, owner column in item display; updated info on: searching and on AFO 469 parameter; added type 6 records; improved info on item details, Z39.50 functions part of 2.0 updates	
4.0	June 2010	New chapter on search result screen; improved bookmarks; new option to copy multiple records to another database; new automatic barcode feature; clear loan status button; possible to delete records with empty shelfmark; option to modify search term; more on restrictions, including new option; new option for related searches; new sort options, option to show title information in menu bar of record editor; option to browse through records; [bracket for item barcode; author/title on item/shelfmark summary screens; simple template option part of 2.0.06 updates	