

Cataloging Helpers

Cataloging Helpers will appear on appropriate screens as you perform cataloging functions. Only helpers that function from a specific screen will display.

1. Show/Hide Search Pane Helper

Search Pane – Contains the Search edit box. This pane also provides search type, search index, and search library options. If there is an existing current title, it will display next. This pane also contains the type of search you want to perform, Keyword, Browse or Exact.

2. Show/Hide View Pane Helper

View Pane – Displays the list of matching records after you perform a search. A summary statement of your search results appears at the top of the View Pane. Depending on your search results or the type of search you are performing, a Browse list may display. Hit lists will appear on Headings and/or Records tabs. Selected entries on the Headings or Records tab cause the record's Description, Call Number/Item, Bound-with Information, and possibly other tabs, such as Order Information, to display.

3. Show/Hide Circulation and Extended Information Helper

When using the Item Search window, the Show/Hide Circulation Information helper is available. The Show/Hide Circulation Information Pane helper is a toggle helper. That is, this helper can turn the Circulation Information area on (show) or off (hide).

In the Item Search window, the Circulation Information area displays item circulation information about the selected title. Item circulation information might include price, item type, home location, current location, and item categories, date created, date charged, and so on.

To turn the Circulation Information area on or off, click the Show/Hide Circulation Information helper.

4. Show/Hide Tree Information Viewer

Bound-with Tree Pane – Contains the title you selected to be linked. The Bound-with tree displays a hierarchical structure (tree view) of the title record and its call numbers and items. You can expand (click a plus sign) or collapse (click a minus sign) the structure to make it easier to use. Clicking the plus sign next to the title record displays its call numbers and items. The tree uses icons to indicate a title record, call number record, and item.

5. Set Option for Item Lookup

Use the Set Options for Item Lookup helper to qualify the search method you have selected to conduct the search. The following item lookup options are available. Select a folder tab to see the options.

Search
Browse
Display (Exact)

FYI: Sort By

The Search or Browse lookup results will be sorted by the selected criteria. The following sort options are available.

If a sort order is not selected, results display in the order that they were entered into the catalog or last modified.

Author sorts by the first occurring author field in the record. Titles that do not include an author display first in the list. Main entry (1xx) and added entry (7xx) authors are combined in the sort.

Title sorts by the title statement (245) entry.

Subject sorts by the first occurring subject field in the record. All subject heading types, including topics, names, titles, and geographic headings (6xx) are combined in the sort.

Pub Year sorts with the earliest published titles first.

Reverse Pub Year sorts with the most recently published titles first. Modifications to these folders are retained until another wizard is selected. If your search does not return results, a message will suggest that your lookup options are too restrictive.



6. List the Catalog by Call Number Helper

The List the Catalog by Call Number helper is used to display all of the call number records in your library's system, which share the same call number or portion of a call number. This feature is useful when assigning call numbers and finding materials using specific class numbers.

You may display the catalog by call number at any time when using the wizard. Enter the call number or portion of call number that you want to search in the Start List With field. Do not enter any truncation symbol for a call number portion, but be sure to properly capitalize and punctuate the call number you enter. Any call number that includes the text will be retrieved. The records that are retrieved may not be displayed in call number order.

Example:

If you listed the catalog for call numbers including KF4, a sampling of call numbers would be listed in the following order.

KF410 .K9
KF4114 .D76

NOTE: To browse only your own library collection in shelf list order, browse by call number using the Item Lookup. After a list is retrieved, you may select to view the bibliographic, volume, and copy information, look up another call number, or close the helper.



7. Display Bibliographic description

The Display Bibliographic Description helper is used to display bibliographic, call number/item, and order information about the current item.

Bibliographic Information

Under Bibliographic Information, the following information may appear.

LCCN
ISBN
Author
Title
Publication Information
Physical Description
Subject Term
Holdings statement

NOTE: *The bibliographic information that appears depends on the entries defined in your All, Brief, or Full entry templates for the format being displayed.*

Under Call Number and Item Information, the following information appears.

Title's call number
Number of items
Holding library
Items
Item IDs
Item types
Current locations
Whether or not the item can circulate
Number of current holds
Item extended information, such as staff and public notes

8. **Modify Selected Items Helper**

The Modify Selected Items helper allows you to search for items by title, and then select the items you want to modify.

Click the **Modify Selected Items** helper. The Item Search window appears.
Use Item Search to search for the title you want. If a Current record exists for the item, click the Current information link to access the last record displayed, modified, or added.
If your search finds results, a list of matching records display in the hit list area. Select the record you want to display. The selected title displays in the Viewer pane on the Call Number/Item tab.
To modify all items at once, select the check box next to the title record.
To modify individual items, select the check box next to each item you want to modify.
Click **Next**. The item values you want to modify appear.
Click **Modify** to apply the global modifications.
-Or-
Click **Cancel** to return to the Global Item Modification wizard.

9. **Show Valid 852 Locations Helper**

This helper displays only when a MARC Holdings record is displayed for modification. You can modify MARC holdings when you are working with either catalog records or serial control records.
Click the Show Valid 852 Location helper.

In the Valid 852 Locations list, select the 852 location you want, and then click OK to copy the 852 location text you selected to the Windows Clipboard.

Click the place in the 852 entry where you want the information to appear, and then press CTRL+V to paste the text in the 852 entry line.

After you have pasted the text, your 852 entry might look something like this: |cSTACKS
Click **Save and Close** to save your changes or **Close** to close this helper without saving any changes.
Note The 852 locations that display in the Valid 852 Locations list are Location policies, which are valid in the MARC Holdings record, for your library.



10. Validate Headings

The Validate Entries helper allows you to check bibliographic headings under authority control and to validate indicators and subfields. This helper displays only in wizards that permit modification of the bibliographic record in the Bib folder.

NOTE: *The Validate Headings helper saves any changes to the bibliographic record before beginning.*

With the Validate Entries helper, you may be prompted to verify tags under the following circumstances. The indicators do not meet the parameters defined in your entry list. Use the verify list to select indicators that are valid for that entry. To display valid indicators for the second indicator position, you must place your cursor on the second position before selecting the verify list.

NOTE: *In many cases, entries do not have any valid indicators. If the verify list does not display data, there are no valid indicators defined for that position.*

Authority headings in author (1xx, 7xx), series (4xx) or subject (6xx) tags are unauthorized. Use the Browse Authority gadget to validate the heading.

After reviewing the displayed indicator or heading problem, take one of the following steps:

- OK the changes to validate the entry. If the change made to the indicator or entry is valid, the OK will advance to the next entry in the list. If the changed indicator or entry cannot be validated, it will continue to display as the current entry until it is either corrected or skipped. Invalid or skipped entries continue to display the next time the validate entries helper is invoked.
- Skip the indicator or entry displayed without making changes or validating the change.
- Skip all subsequent invalid indicators and unauthorized entries for the title without making additional changes.

NOTE: *If the behavior properties in the Validate Headings helper are not configured to skip unauthorized headings, the Skip and Skip Rest buttons do not display.*

NOTE: *The Validate Headings helper will not display in cataloging wizards unless the system is configured for authority checking.*

11. Shadow Options

This helper governs the display of items in the shadow catalog. In the Item Search and Display wizard, or any process of reviewing a record, this helper is referred to as the Shadow Levels helper, and displays the information without allowing edits.

The library may want to hide or "shadow" records, which cannot be used by patrons, such as lost or missing volumes/copies or titles still being cataloged by technical services. The shadow options permit catalog, call number, and copy records to be searchable only by library staff.

NOTE: *A Location policy may also be defined as a shadow location, so any item with a shadowed current status will display as a shadowed copy. Once a shadowed location is created, its shadow status cannot be modified.*

When the Shadow Options helper is selected, the shadow options that display are based on the level of record that you are working with. If you are creating or editing a title and your properties allow, you can shadow at the title, call number, and/or copy level. If you are adding or editing a call number, you can shadow at the call number and/or copy level. If you are adding or editing a copy, only the copy level shadow option will display. A shadow copy option will not display for a call number that does not have an attached copy.

If the item you are editing is already in the shadow catalog, the shadow options will display enabled.

- Enable the Shadow Title checkbox to prevent the title and all of the call numbers and copies associated with it from displaying to the public.
- Enable the Shadow Current Vol. checkbox to prevent the call number and all copies associated with it from displaying to the public.
- Enable the Shadow Current Copy checkbox to prevent the single copy from displaying to the public.

It is only necessary to enable the highest level of shadowing. However, a title being shadowed temporarily that should still have call numbers or copies shadowed when it is returned to the standard index should be shadowed at multiple levels.

The status of any item can be changed so that it moves from the standard catalog index to the shadow catalog, or from the shadow catalog index to the standard catalog.

12. Insert a field Before the current one Helper

The Before helper can be accessed from commands that create hold, item, or user records or from commands that modify this information. The Before helper allows fields to be added before the field in which the cursor is positioned.

NOTE: If you don't want to use your mouse to select the helper to enter a new line, you may enter the key combination "Ctrl B" to enter a line after the field in which the cursor is positioned.

13. **Add a field After the current field Helper**



The After helper can be accessed from commands that create hold, item or user records or from commands that modify this information. The After helper allows fields to be added after the field in which the cursor is positioned.

NOTE: If you don't want to use your mouse to select the helper to enter a new line, you may enter the key combination "Ctrl A" to enter a line after the field in which the cursor is positioned.

14. **Append a field Helper**



In addition to adding fields, you can also append a field to a record. When you append a field to a record, Unicorn adds the new field at the end of the record.

Position your mouse pointer anywhere in the Editor window, and then click the **Append Field** helper.
-Or-

Right-click anywhere in the Editor window to open the shortcut menu, and then click **Append Field**. Type the field you want to add. Unicorn adds the new field at the end of the record.

15. **Delete the current field Helper**



While editing a record in MARC View you can delete the current field from the record. In MARC 21 format, you cannot delete the LDR and 008 fields.

Position your mouse pointer on the field you want to delete.

Click the **Delete** helper.

-Or-

Right-click to open the shortcut menu, and then click **Delete Field**

The Delete helper can be accessed from commands which modify hold, item, or user information. The Delete helper allows an entry to be deleted.

NOTE: The Delete helper may display either on the right or left-hand side of the window.

16. **Change Display Library helper**



In multi-library systems, while editing an item in all Cataloging wizards that have a Call Number/Item tab, you can select to view only items for a specific library.