Lotus Domino® Application

GeoCom® Library

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Documentation for Librarians

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1 Introduction

GeoCom® Library is a library management system that serves to systematically acquire, catalogue and manage single-volume monographs and multi volume sets, series, articles / contributions to jubilee publications, periodicals, and loose-leaf-binders.

At the same time GeoCom® Library can be used for acquisition, lending and library research (**OPAC** – **Online Public Access Catalogue**).

The main database stock contains the union list of all publications, i.e., titles and copies as well as orders and correspondence.

The library management program comprises the following databases, which are exclusively designed to support librarians:

- main database
- subject heading database
- publishers database
- suppliers database
- classification database
- data repository (ISO 3166 country codes)

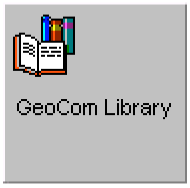
The application bases on the groupware-platform Lotus Domino® and requires use of a Notes Client version 5.09, 6.03, 6.5 or higher.

2 Overview of the databases

This manual explains the structure of the library management system and details on the operational procedures that are part of this system with its different databases. Hereby the library management consists of several databases that support all management operations.

The core element of GeoCom® Library is its main database. It not only stores the complete stock of publications but also serves to manage all kind of activities that make up a librarian's daily responsibilities like acquisition, cataloguing or lending of publications.

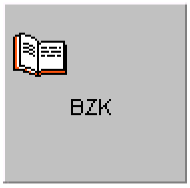
All databases provide a multi language user interface (views and dialogue- boxes)



Main database:

This database contains the complete stock of publications (general index of titles and copies) as well as the author index, the location index and the correspondence.

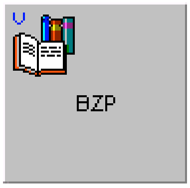
All actions concerning the library – such as recording of new titles, authors and publishers or research via subject headings, lending and circulation – can be performed from within this database.



Subject heading database:

This database contains a list of subject headings which can be used as proposal list while recording new titles.

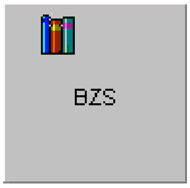
See also 0, Classification database.



Publishers database:

All data concerning publishers will be stored to this database. Publishers can thus be administered independently of the actual data stock of the application.

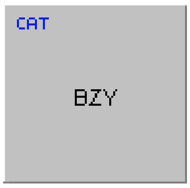
See also 12.2, Publishers database.



Suppliers database:

Likewise to publishers data, suppliers data will also be stored separately from the actual data stock of the application.

See also 12.3, Suppliers database.



Classification (systematic) database:

This databse contains the full index of classification entries which catalogue entries can be subject to.

See also 12.4, Classification database (systematic database).

BZC data repository:

This database contains country codes according to ISO 3166.

See also 12.5, Data Repository.

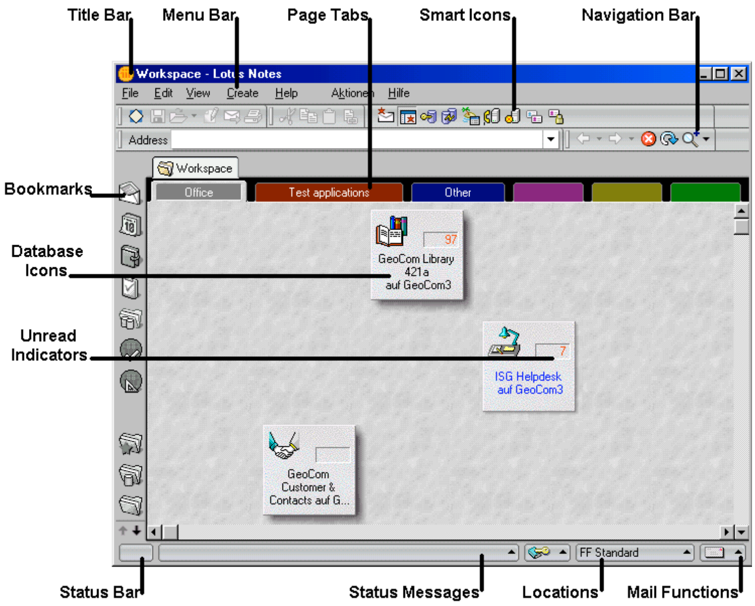


Illustration: Lotus Notes Desktop with its functional elements

The **title bar** shows the workspace. Underneath, the **menu** and the **navigation bar** are situated. The **smart icon bar** is characterized by symbols, which can be used to execute frequent activities. The **page table** shows which applications are actually at your disposal. At the left margin you'll find the **bookmarks**. On the main screen the several **database icons** are situated. By double clicking on the icons you can open a selected database. A little window within every database icon indicated the number of **unreaded documents**.

At the bottom you'll find (from the left to the right margin) the **status bar**, a field for **status messages** (e.g. you have new mail), the **location** (e.g. office, home, remote) as well as **mail functions** (create new memo, get mail).

3 Main database

The main database of the library management system GeoCom® Library contains the complete stock of publications (general index of titles and copies) as well as author index, location index and correspondence.

3.1 Adding the database to the workspace

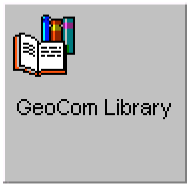
To add the icon of the main database to your Lotus Notes workspace follow these steps:

File -- Database -- Open

First, select the server on which the database resides. Using the scroll bar, choose the main database from the list displayed in the window and select it with a mouse click. Finally, click on the button "Add icon".

Now you'll find the database's icon on your Lotus Notes desktop.

3.2 Opening the database GeoCom® Library



Now, that you have added the database to your workspace open it by double clicking the new symbol.

The following main window is now displayed:

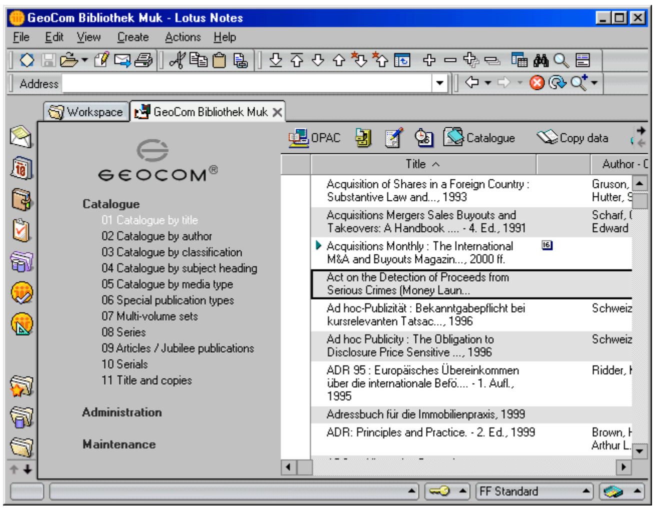


Illustration: View Catalogue – 01 Catalogue by title

The navigator within the left part of the screen shows an overview of all views. The width of this navigator window can be arbitrarily specified by dragging it with the mouse.

The main categories "Catalogue", "Administration" and "Maintenance" as well as some of the corresponding subviews can be expanded by clicking them with the mouse. All other views can directly be opened via mouse click.

☛ **Note:** The "ESC"-key can be used to close a view / window.

4 Views

Views provide a quick overview of available documents. Each line within a view represents a document, giving you a one-line summary of the essential information characterising that document.

Several views will be shown in a condensed form.

Those views within the standard navigator preceded by a green triangle symbol (also called twistie) are condensed and will yield more options when you click the symbol with your mouse.

Illustration: Condensed and enlarged views

Click the "Expand All" button within the smart icon bar to show all entries in their full form.

Entries shown in the rightmost half of the screen can be opened by first selecting, then double clicking them.

All views of the application can be reached via the navigator. There are three groups the views are divided into: "Catalogue", "Administration" and "Maintenance".

Only librarians can access the two latter groups of views, whereas the "Catalogue" views are available to librarians and normal user alike (with the exception of view "Catalogue – 11 Title and copies", which is only available for librarians).

The views within the particular groups will be shown in the following:

The group of views "Catalogue" holds the data stock of the application and is made up from several subviews.

Catalogue

01 Catalogue by title

02 Catalogue by author

03 Catalogue by classification

04 Catalogue by subject heading

05 Catalogue by media type

06 Special publication types

07 Multi-volume sets

08 Series

09 Articles / Jubilee publications

10 Serials

11 Title and copies

The view "Administration" holds views for administrating the data stock, handling acquisition or lending and so on. These views are only available for librarians.

For further information please refer to 6, Administration.

Administration

01 Acquisition
  a. orders
  b. copies in acquisition
  c. trial orders
  d. continuation orders
  e. journal delivery
  f. loose-leaf delivery
  g. deadline detected
  h. order templates

02 Lending
  a. employees
  b. borrowed copies
  c. all transactions

03 Circulation
  a. copies with circulation entry
  b. printed circulation slips
  c. circulation slip templates

04 Book lists
  a. documents
  b. book list templates

05 Letters
  a. documents
  b. letter templates

06 Inventory

07 Statistic reports

The group of views "Maintenance" can only be accessed by librarians and contains views to maintain meta data, i.e. index lists (which are stored to separate databases), configuration backups or replication conflicts.

See also 7, Maintenance.

Maintenance

01 Index lists
  a. Author
  b. Corporate body
  c. Series
  d. Location

02 Configuration (Backup)

03 Replication conflicts

4.1 Opening views

To open a view simply click the desired view within the navigator, e.g. "Catalogue – 01 Catalogue by title". The following view appears:

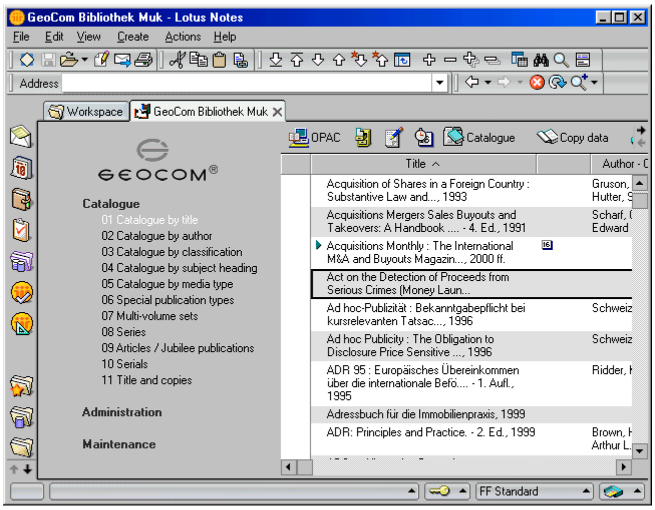


Illustration: View "Catalogue – 01 Catalogue by title"

On the right side of the screen the currently selected view is displayed. Use the scroll bar to get an alphabetical overview of the complete stock.

By double-clicking an entry, detailed information, e.g. title name, signature, status and location can be displayed.

It is also possible to display a preview of catalogue entries. In preview mode the right side of the screen is divided into two windows, displaying the selected entry in the top window and detailed information in the bottom window.

To inspect an entry in preview mode select the title within the corresponding view and click the preview button in the Smart Icon bar.

llustration: Selected entry in preview

In case of multi volume sets and series the volume serial number is also displayed in the preview as is the corresponding edition and date of publication information.

4.2 Switching views

You can easily switch from one view to another by simply clicking the desired view within the navigator.

4.3 Column headings within the views

Different column headings exist within the views of GeoCom® Library.

The following screenshot shows the column headings within the view "Catalogue – 11 Title and copies".

Some of the column headings carry a triangular symbol; clicking on this symbol will sort the view by this column. This can be used to display signature, acquisition number, barcode (if available) or modification date information of the entries. With another mouse click, the selection will be reset.

4.4 Buttons in main views

For better application handling and more user-friendliness the main views all contain the same buttons in the same order.

The following buttons are always available in the main views.

☛ **Note:** The actions available under the buttons “Catalogue“ and “Copy data“ may vary according to the selected view.

OPAC

Borrowing

Comments

Tickler entries

Catalogue

1. Edit document
2. New entry
3. Create duplicate
4. Add volume to multi-volume-set
5. Multi volume set administration
6. Add volume to serie
7. Sort series volumes

Copy data

1. Select and edit copy
2. Prepare acquisition

3. Selected copies: modify status
4. Journal administration
5. Loose-leaf administration
6. Deadline monitoring

Prepare printing

5 Catalogue

Within the group of views "Catalogue" the complete data stock of the application can be found. All actions concerning data management or administration of catalogue-, title- or copy data can be performed from this view.

Bibliographical references can be either recorded manually or imported electronically from the VLB.

Recording new titles (monographic publications, multi volume sets, series, articles / jubilee publications, journals as well as loose-leaf-publications) starts with cataloguing. There are two ways to do this:

1. electronically import data from VLB-CD-ROM
2. manually record new entries.

☛ **Note**: For the electronic import of bibliographical references see chapter 11, Data import.

5.1 Group of views "Catalogue"

The group of views **Catalogue** contains the data stock of the application and is divided into several subviews.

Catalogue

01 Catalogue by title

02 Catalogue by author

03 Catalogue by classification

04 Catalogue by subject headings

05 Catalogue by media type

06 Special publication types

07 Multi-volume series

08 Series

09 Articles / Jubilee publications

10 Serials

11 Title and copies

The views *01* to *05 – Catalogue by...* each contain the data stock currently available within the database, sorted by the corresponding feature.

View *06 – Special publication types* only contains those titles, which have been assigned one of the special publication forms, e.g. journals, yearbooks etc.

The views *07* to *10* only list titles disposing of a certain feature, e.g. affiliation to a multi-volume set, a serial etc.

The view *11 – Title and copies* shows the complete stock, sorted by title, just like view *01 Catalogue by title*. Additionally, this view also shows the available copies corresponding to these titles, i.e. this view shows the physical book stock of the library.

View *11 – Title and copies* is only available for librarians, whereas the other catalogue views can be used by normal users as well.

5.2 Titles and copies

GeoCom® Library differentiates between the union catalogue and the inventory. Even such titles that have not yet been acquired, catalogued or shelf-marked may be inserted into the union catalogue. Thus, the union catalogue can be used for order procedures and furthermore serves as a knowledge base of existing publications that may yet need to be acquired.

All purchased titles and copies find entry into the inventory, where catalogued titles are sorted into single-volume and multi volume works, series, articles / contributions to jubilee publications and loose-leaf binders. The status also will be displayed, e.g. availability, location, signature and lending status.

5.2.1 Title

In addition to the electronic import, GeoCom® Library provides form sheets for manual recording.

Within this recording process, new titles are assigned to one of the following types:

- **single volume monograph**
- **multi volume monograph**
- **serial**
- **multivolume monograph without volume entry**

Depending on the selected type, several sub types can be assigned to the new title:

- **loose-leaf publication**
- **journal**
- **collection of administration of justice and jurisdiction**
- **yearbook**
- **business report**

Illustration: Dialog select type

Illustration: Dialog select sub-type

Loose-leaf publications can be either single- or multi-volume. In addition, a series title can be added.

5.2.1.1 Structural elements of the electronic form sheet

The form sheet for recording new titles consists of several sections. These sections serve for the correct recording of new data as well as for the following administration process.

To record a new title, first select within the standard navigator any view that dispose of a button to record new titles.

Select the button "Catalogue – New entry" from the symbol bar.

In order to create a copy from an existing entry (e.g. if another edition of the same title has been released), you can use the button "Catalogue – Create duplicate".

Two electronic form sheets for recording new titles are available – the standard record form and an extended form sheet.

By using the selection button "extended form sheet" you can toggle between the standard and the extended form sheet.

Upon recording titles via the extended form sheet, the section **Catalogue entry** is extended by several fields. Also the sections **Internal information** and **Copy details** are visible.

The following screenshot shows an empty form sheet used to record new titles (extended form sheet).

Illustration: Form sheet "New entry"

The edition type is marked by the following symbols:

single volume monograph

multi volume monograph

serial

5.2.1.1.1 Section Catalogue entry

This section serves for the main catalogue entry. Several fields' values can be selected via a predefined selection list, the other fields have to be filled manually.

Allover, there are five selection fields within this section: *Author(s)*, *Corporate body*, *Series title*, *Publisher* and *Media*. The latter can be adopted from a selection list which also contains electronic ressources.

In some fields it is possible to adopt more than one item from the dialogue boxes; this is, for example, true in case of the publisher. However, only the first entry will be compared with existing publishers' names.

The other fields - such as *ISBN- / ISSN-no*, *common title*, *subtitle*, *uniform title*, *parallel title* as well as *series title* and other notes to *volume number*, *place* and *date of publication*, *edition* (num. for sorting), *page reference*, *university notes*, *footnote* or *URL* can be filled individually.

If one of the options for RAK-NMB is selected, the title will automatically be enhanced by the corresponding addition in squared brackets.

Illustration: Main catalogue entry single-volume monograph

☛ **Note:** In order to update the predefined selection lists, see 12, Auxiliary data bases.

5.2.1.1.2 Section Internal information

The section internal information is only visible within the extended mode.

To show the extended form sheet click the corresponding button.

The section "Internal information" serves to store internal information concerning different items like illustration statement, accompanying material, price, size, and comments. The currency can be adopted from a list displayed in a dialogue box.

Aside you can restrict the read access for specific persons or/and groups. Read access refers to all related documents, as the title document, copies or articles. Remain the field empty, the title document is visible for all users, however, and it is possible to restrict the read access for the related copy data.

Five additional fields will be displayed as soon as the option *serial* is selected for edition type: *Number of copies, Frequency, Frequency of binding, Other information to frequency* and *Other information to frequency of binding*.

Illustration: Section internal information

☛ **Note:** The restrictions are only relevant for normal users - librarians always have full access.

5.2.1.1.3 Section Subject indexing

This section serves to handle the categorisation and subject indexing. Two dialogue boxes each containing a list of different keywords are displayed within the fields "Classification system A" and "Classification system B". The subject heading can also be adopted from a list displayed within a dialogue box.

Classification system B lets you also specify *Country* and *Language*, which can be used in an OPAC search.

Illustration: Subject indexing

The field *Content information* can be used to add arbitrary information regarding the title, such as file attachments, links to Notes-documents, Web-documents or journal contents that are scanned.

This field can be viewed by normal user within preview.

5.2.1.1.4 Section Copy details

This section displays information on the serial copy number, signature, copy status and main location.

Illustration: Copy details

☛ **Note:** This section only becomes visible when a new entry is recorded using the extended electronic form sheet.

5.2.1.1.5 Section Comments

This section serves to enter additional information or to attach files concerning the publication (e.g. a digital copy of the table of contents).

Illustration: Comments

To store a new entry click on the button "Save" within the symbol bar.

The new document will be stored and added to the main database.

5.2.1.1.6 Checking for duplicates

In order to avoid recording titles that have already been recorded, for each new entry duplicates will be checked through its ISBN-no.

If the database contains a title with the same ISBN-no. an alert box pops up.

Illustration: Dialogue box “Checking for duplicates”

By clicking on one of the two radio buttons within this dialogue box you can either record a new copy to the corresponding title or record a new title with this ISBN-no.

In addition to this duplicate checking, ISBN as well as ISSN will be checked for inout errors.

5.2.2 Copies

Each copy disposes of specific information that must be administered. These copy-specific data can be administered uniformly via the field **Copy data**. While administration you can note the status of particular publications.

After a new title has been recorded you can start administrating copy data.

For this first mark the corresponding title (if necessary search a view for this title).

Then click the button "Copy data – Select and edit copy".

The following dialogue box will be opened:

Illustration: Dialogue box "Copy data"

By default the box “create new copy” will be activated. Furthermore, the dialogue will show that there are no copy entries yet concerning this title. Confirm with OK. You will see the entry form for copy data with which you can administer all copy data uniformly.

The entry of copy data is being done in nearly the same way for all different edition types.

5.2.2.1 Structure of the copy data form

The form for copy data consists of different sections.

The screenshot shows a form with data already filled in.

Illustration: Form for copy data

5.2.2.1.1 Section status

The upper left selection field lets you specify the status of the corresponding copy, e.g. catalogued, to bindery etc.

Illustration: Selection field "Status"

Depending on your selection additional selection fields will show up in the right section, which let you specify the copy further (e.g. whether a publication should be bought or trial ordered).

Additionally the current date of each transaction will be noted.

5.2.2.1.2 Section copy data

This section contains all specific data to this copy.

Illustration: Section Copy data

By default consecutive numbers will be given to the copy, e.g. *serial copy number 1*. In case of that a serial copy number 1 exists, another number will be issued, e.g. serial copy number 2.

The field *serial accession number* will automatically contain consecutive numbers for the whole data stock, e.g. number 100 for the 100th record; the next record would automatically become number 101. The Barcode-No. can be manually entered.

☛ **Note:** A *consecutive accession number* will only be given to this record if a copy is marked “catalogued” and saved!

The *signature* will also be generated automatically from classification system A, category 1 and 2. Further an arbitrary add-on can be made. As already mentioned, the signature will automatically be generated, but it can as well manually be specified (see also 5.3.2, Structure of signature).

As default for the main location 1 the location where the copy currently is administrated is selected. New locations can be added at every time and placed as selection lists at the users dispose.

In order to add new locations to the list click on the button "pull down" within the field "Main location" or "Location". The following dialog box opens:

Illustration: Dialog Location

Enter the new location into the line "New keyword" and confirm by clicking the OK button.

Use the pull-down-button within the field *Lending base status* if the copy should be assigned to the Bibl. Lending collection, the Bibl. Non-lending collection, the local stock lawyer or the local stock. Confirm your selection with OK. As default the status **Bibl. lending collection** is selected.

Illustration: Dialog Lending base status

5.2.2.1.3 Section specification for supplier and orderings

Within this section information regarding the supplier of this copy as well as price and delivery info can be entered.

Illustration: Section Supplier and ordering info

Using the pull-down-button within the field *supplier* you'll reach a dialogue box that lists all suppliers. Select a corresponding entry and confirm with OK.

If a certain supplier is not yet available within the data base, use the button "Supplier" to create a new supplier document (for information about creating supplier documents, please refer to 12.3.2, Recording a new supplier).

Clicking the pull-down-button within the field "Currency" will open a dialog where you can specify the corresponding currency.

In order to detect the department that is responsible for expenses, the electronic form sheet provides a special field to enter this information.

The purpose of the field "Order comments" is to enter additional information. This information will be also displayed within view "Administration – 01 Acquisition – b. copies in acquisition".

5.2.2.1.4 Section Content information

Within the form for administration copy data another field is at your dispose. This field can be used to enter information regarding the content. As Rich text field (RTF) it is possible to attach files like pdf- or MS-Word-documents. This makes it possible to store external generated files to the copy data.

Illustration: File attachment within the field content information

☛ **Note:** Management of copies can be also performed at a later stage. To do so select the corresponding view. Checkmark the respective
entry and click the button "Copy data – Select and edit copy".

Illustration: Dialog Edit copy

You will see the dialog box "Edit copy" - just as with creating a new copy – but the box now shows the already existing copies. If you want to edit an existing copy select the corresponding entry, make sure, the checkbox "create new copy" is deactivated, and confirm with OK.

5.3 Cataloguing titles

The cataloguing process follows the edition type, e.g. multi volume works, jubilee publication or loose-leaf publication.

In the following the two different recording procedures will be described for each edition type separately.

☛ **Note:** The standard form sheet does not display fields corresponding to **internal information** and **subject indexing**. However, all fields which have been filled with data from within the extended form sheet, will also be available in standard mode.

5.3.1 Compulsory fields

The electronic form also contains compulsory fields. Before storing a new entry these fields have to be filled in. Otherwise an entry cannot be stored properly (an alert box warning you to complete the necessary items pops up on the screen)

Depending on the type of title administration the number of compulsory fields can vary.

- single volume monograph, compulsory field “title“

- multi volume monograph, compulsory field “series title“

- serial, compulsory field "title"

- multi volume monograph without volume entry, compulsory field "title"

If one of these fields remains empty an alert box comes up, indicating to complete the corresponding field, otherwise the new document cannot be stored.

5.3.2 Structure of signature

On recording of an entry the library management system makes a signature proposal according to the classification and the corresponding configuration settings.

However, it is possible to assign a signature according to individual standards. For more information on the assignment of signatures see the global configuration document.

To reach this document select from menu bar:

Actions – Admin – configuration

Automatically generated signatures contain following parameters:

Example for a signature: G-11-2|(2)

Type of signature continual

A = 1 category

- = delimiter

A = 2 category

- = delimiter

2 = accession number

| = delimiter for additional signature

(2) = edition number (num. of sorting)

For further information regarding signature assigning and configuration please refer to the configuration manual of GeoCom® Library.

5.3.3 Recording single volume monograph

Typically, single volume works are recorded by using the standard electronic form sheet. In this mode all mandatory fields are shown.

Click the button "Catalogue – New entry" to open an empty form.

Via the "Form" button within the symbol bar you can select the standard form sheet (in case the button shown here is visible, the standard form sheet is activated).

Then start recording the title by selecting an edition type.

Click the pull down button within the field *Edition type* to open a dialog box from which you can select your edition type.

Illustration: Dialog Edition type

Select the entry "single volume monograph" and confirm with OK.

By using the pull down button to the right of the field *Edition type* you can open another dialog box giving you some keywords to further specify the edition type of your title (e.g. loose-leaf publication, yearbook etc.). Confirm your selection by clicking OK again.

Illustration: Dialog Edition subtype

Then, insert the ISBN- or the ISSN-no. of the corresponding work respectively. Within the field *Author(s)* click the pull down button in order to open the authors' list.

Illustration: Dialog Authors list

Select the author by clicking on one or more names from the list and confirm with OK. The name is copied into the field.

☛ **NOTE:** In order to search an author's name only type the first letters. A dialogue box for quick search pops up.

llustration: Dialog box Quick search

By confirming OK a dialog box with an author's list opens, already containing the authors' names you had selected in the previous dialog box.

The field Author name should contain the desired names, following the given principle:

SURNAME – COMMA – SPACE – GIVEN NAME – SPACE – INITIAL 2. NAME

Illustration: Authors list

Within the column *Add. information* you can specify further information regarding this author's status (e.g. editor, co-author etc.). By clicking OK the entry will automatically be adopted into the author's list. Up to 10 authors can be specified for each title.

By clicking the "Authors" icon within the dialogue box you will be presented a full listing of those authors that are currently stored within the database.

You wil again see the selection list for authors.

Select the desired author's name and confirm your choice by clicking OK – the data will be adopted into the corresponding field.

☛ **NOTE:** Authors' names can also be entered manually. Any names entered manually will automatically be adopted into the selection list for future use.

By clicking the pull down button within the field *Corporate body* you will reach a dialogue box providing you with a corporate body list. Select an entry and confirm with OK. The selected entry will be adopted into the corresponding field.

Illustration: Dialog Corporate body list

☛ **NOTE:** Alike to authors' names you can manually enter corporate bodies. New names will automatically be added to the selection list.

Now, into the field *Title* enter the corresponding name of the single volume monograph. The fields *Subtitle, Place* and *Date of publication* can be filled with arbitrary values.

☛ **NOTE:** The field *Title* is a mandatory field which has to be filled in order to be able to save the document.

We have just seen how an author's name can be adopted from a list. In similar fashion the publisher's name can be adopted from a list, too: Click the pull down icon within the field *Publisher* to open a dialog box offering a complete listing of recorded publishers. All publishers currently stored within the database can thus be displayed in an overview.

Illustration: Dialog box Publisher

In order to search for a publisher, type the first letters of the publisher's name. A dialog box for quick search instantly pops up.

However, if the publisher has not yet been stored in the database, you can generate a new publisher's document.

The cataloguing process of titles can be done by clicking on the pull down button within the field *Media*. Select an entry from the dialogue box and confirm with OK.

Illustration: Dialog Select media

The classification of an entry can be done within the section **Subject indexing**. Here you can give information regarding classification etc.

Click on the pull down button within the field *Classification system A / 1. Category* and adopt a suitable entry from the list. Confirm with OK.

Illustration: Keywords (Classification system A / category 1)

The field *Classfication system A / 2. Category* lets you further specify your classification depending on the selection you made for classification 1.

Illustration: Keywords (Classification system A / category 2)

Additionally, you can assign one or more keywords to the new title.

Click on the pull down icon within the field *Subject heading* and select one of the two options "only keys of own location" or "all keys".

Illustration: Dialog box Key list selection

Depending on the selection you made, a corresponding dialog opens containing the keyword list either of your own location only or of all locations.

Illustration: Dialog Keyword list location only

In order to search for a keyword within the list start typing the first letters of the keyword. A dialogue box for quick search pops up.

Illustration: Dialog box Quick search

☛ **NOTE:** It is possible to adopt one or several entries to this field. In order to delete an entry, first click on the button "Edit document", then select the entry with your mouse and press the **DEL** key.

5.3.4 Recording single volume monograph (extended form sheet)

Beside using the standard electronic form sheet you can also use an extended form which can be accessed via the corresponding button within the symbol bar (on click, the symbol changes its appearance; when the pictured button is shown, the extended form is activated).

Within the section **Catalogue entry** this form shows the fields uniform title, parallel title, series enumeration (num. for sorting), page from/to (num. for sorting) and URL.

Thus, to adopt the currency click the pull down button within the field *price/currency*. This will open a dialog box providing a list of currency keywords. Select an entry, e.g. EUR and confirm with OK. Other currencies can be added to the list at any time (section "New keyword"). By default, the currency will be EUR (Euro).

Illustration: Dialogue box “Currency”

In addition to the extended electronic form sheet the section **Internal information** is also displayed, in order for you to administer internal information, e.g. accompanying material. This section also provides fields, in order to store format options and additional names.

5.3.5 Recording multi volume monograph

Multi volume monographs can also be recorded using the standard electronic form sheet.

To record a multi volume monograph click on the button "Catalogue – New entry" and then on the form button within the symbol bar in order to use the standard electronic form sheet.

Start the recording process by selecting the corresponding edition type as described above, in this case "multi volume monograph". Now, fill in the mandatory fields (common title, subtitle, volume number). In addition to mandatory fields further remarks such as place and date of publication, edition (num. for sorting) and media can be entered at your discretion.

The two sections **Internal information** and **Comments** are displayed and can be filled in.

For information on administering certain volumes, see 5.4.2, Administration of multi-volume monographs.

5.3.6 Recording multi volume monograph (extended)

Just as single volume monographs, multi volume monographs, too, can be recorded using the extended electronic form sheet.

Clicking the form button within the symbol bar will show the extended electronic form sheet.

When using this form you will see the sections **Internal information** and **Copy details**. Additionally, the section "Catalogue entry" is enlarged. The field’s uniform title, parallel title, jubilee publication and series enumeration (num. for sorting), page from/to (num. for sorting) and URL are enlarged.

Start the recording process by filling in the ISBN-no. Now, from the authors list select the corresponding name (person). Specify the common *title* of the new publication and enter the *series title* of the corresponding volume. Because you deal with a multi volume monograph, the field *jubilee publication* can remain empty.

The field *series enumeration* holds the value for this volume's number within the actual series e.g. 1(1).

The sections **Internal information**, **Subject indexing** and **Comments** can be filled in the same way as with single volume monographs (see 5.3.3, Recording single volume monograph).

5.3.7 Recording serials

When you record journals and other serial publications you can chose between the standard and the extended form sheet.

Within the field *Edition type* select the option "serial". By clicking the other button specify the edition type, e.g. such as journal, collection or yearbook.

☛ **Note:** While recording serials it is also possible to additionally select the option "loose-leaf publication" as edition type. This means it is possible to select either:

• "serial" and "journal"

or

• "serial" and " loose-leaf publication, journal"

If the latter option is selected as edition type, then the feature “journal” overrides all other edition types during administration process.

The section **Catalogue entry** is condensed and shows only mandatory fields for the storage of the document.

In addition to these mandatory fields, the fields *number of copies, frequency* and *frequency of binding* are displayed.

In order to specify the frequency e.g. daily, weekly, monthly etc. click on the pull down button within the field *frequency*. You will see a dialog box presenting different options. Select one of the options and confirm with OK. The selected entry will be adapted to the form sheet.

Illustration: Dialog box Frequency

Beside to lay down the *frequency* of a publication it is also possible to fix the *frequency of binding*.

To do so, click within the field *frequency of binding* on the pull down button. You will see a dialog box presenting different options. Select one option with one mouse click and confirm with OK. The selected entry will be adopted to the form sheet

Illustration: Dialogue box “Frequency of binding”

Although the section **Internal information** is displayed, the fields *Illustration statement*, *accompanying material*, *currency / price*, *size*, *additional field* and *out of print since* will not be shown.

The sections **Subject indexing** and **Comments,** however, are visible. For information on these sections, please refer to 5.2.1.1.3, Section Subject indexing and 5.2.1.1.5,Section Comments.

To administer journals and other serials, see 5.4.5, Administration of serials.

5.3.8 Recording serial (extended)

Within the section **Catalogue entry** the extended electronic form sheet for recording series shows the fields *corporate body*, *uniform title*, *shorthand of journal*, *series title*, *jubilee publication*, *subtitle*, *parallel title*, *series enumeration (num. for sorting)* and *page from/to (num. for sorting)*.

The sections **Subject indexing** and **Comments** are visible.

For information on these fields refer to chapter 5.2.1.1.3, Section Subject indexing and 5.2.1.1.5,Section Comments.

5.3.9 Recording multi volume monograph without volume entry

Multi volume works can consists of different non-independent volumes. Those works (e.g. dictionaries) are stored as multi volume monographs without entries. In contrast with multi volume works the volumes are not visible within the views.

However, in preview these volumes are shown with their signatures and location information.

The recording process of multi volume works without volume entry can be done using the standard electronic form sheet.

After you have opened an empty form by clicking the button "Catalogue – New entry" you can select the edition type "multi volume monograph without volume entry".

Start cataloguing the title as usual.

Administration of certain volumes of multi volume monographs is done in a similar way as with normal multivolume monographs (see 5.4.2, Administration of multi-volume monographs).

5.3.10 Recording multi volume monograph without volume entry (extended)

The extended electronic form sheet for recording multi volume monographs without volume entries within the section **Catalogue entry** also shows the fields corporate body, uniform title, shorthand of journal, series title, jubilee publication, subtitle, parallel title, series enumeration (num. for sorting) and page from/to (num. for sorting).

The sections **Subject indexing** and **Comments** are visible.

5.3.11 Comments

Those users, who dispose of specific access rights – particularly the roles [AddComment] and [ReadComments] (see Configuration document) – are allowed to create public comments for books and titles. These public comments are listed within the view “01.Catalogue a. by Title” For more clarity, comments will be indicated colored within the view.

Aside it is possible to assigned a private status to specific comments. It means comments that are marked as “private” cannot be read by other users.

To create a new comment (public or private) click on the button "comment" within the icon bar.

llustration: Comment

5.4 Administration of title and copy data

Within GeoCom® Library, for each title from the main catalogue, there can be multiple copies. In contrast to titles (which are just bibliographical information), copies represent physically available book or serial copies at the locations.

Each copy disposes of specific information which has to be administered. These copy specific data can be administered via the field "copy details". Upon administration of the data you can specify the status of each publication.

Copy administration will perform in different ways, depending on the edition type of the corresponding title.

5.4.1 Administration of single volume monographs

Besides title data, single volume monographs usually only hold data for the corresponding copies.

After you have added the title to the main catalogue (see 5.3, Cataloguing titles) you can start the administration of copies.

Highlight the title you want to edit within a corresponding view, e.g. "Catalogue – 01 Catalogue by title".

Then click the button "Copy data – Select and edit copy…".

The following dialog opens:

Illustration: Dialog Edit copy

If no copies have been created so far, the checkbox "create new copy" will automatically be activated. Otherwise the first existing copy will be preselected.

To create a new copy, activate the checkbox "create new copy" and confirm with OK. A form opens where you can specify all relevant data for this copy.

Illustration: Form Copy data

Via the upper left selection field you can access a list of states from which you can select one entry for your copy, e.g. catalogued, ordered, etc.

Illustration: Selection field Copy status

Depending on the selected status type, different selection fields will be shown to the right to further specify the status of the copy. Additionally the date of the last action will be monitored.

Within the field order information you can add information, e.g. "urgent delivery".

By default the *Serial copy number* will be 1 upon creation of new copies. However, if there are existing copies, the corresponding successive number will be entered.

The field *Serial accession number (stock)* will automatically be assigned the current accession number within the stock, e.g. number 100 upon recording the 100th copy; the next copy would be assigned the number 101. The *Barcode nr* can be arbitrarily entered.

☛**Note:** A serial accession number will only be specified if a copy is marked "catalogued" and saved.

The *signature* will also automatically be generated from classification system A, category 1 and category 2. Further, an arbitrary signature postfix can be administered and assigned to the corresponding copy. Though the signature is created automatically upon creation of a new copy document, it can also be specified manually (see 5.3.2, Structure of signature).

The *Main location* will be set to the location where the copy administration is performed. New keywords (locations) can be added to the selection list at any time.

To add new locations to the list, click the pull down button next to the field Main location. The following dialog appears:

Illustration: Dialog location

Via the pull down button next to the field *Lending base status* you can specify whether or not this copy should be available for lending. By default, the value "Bibl. lending collection" is selected.

Illustration: Dialog Selection of lending base status

Via the pull down button next to the field *Supplier* you will reach a dialog box showing a list of all known suppliers. Select the corresponding name and confirm with OK.

In case the corresponding supplier has not yet been added to the database, you can create a new supplier's document by using the button "Supplier" from symbol bar. You will find further information on creating suppliers' documents in 12.3.2, Recording a new supplier.

The pull down button within the field *Currency* opens a dialog box from which you can choose the currency of this copy. Select the currency and confirm with OK.

In order to identify the responsible cost center, you can specify these information within the corresponding field.

Furthermore, the field *Content information* is available, where you can store arbitrary data, such as pdf or Word documents.

Illustration: File attachment within field "Content information"

☛**Note:** Copy management can also be done at a later time. To manage copies you first have to select the corresponding view.

Then select the title entry for which you want to manage copies and click the button "Copy data – Select and edit copy…" to open the copy selection dialog box. All data concerning the selected copy can be altered within the copy form.

☛**Note:** To change the status at a later time, you switch to view "Catalogue – 11 Title and copies". Select all copies for which you want to edit the status.

Then click the button "Copy data – Selected copies: modify status" or select the same named action from the menu.

5.4.2 Administration of multi-volume monographs

Administration of multi-volume series is usually done from view "Catalogue – 07 Multi-volume sets".

For multi-volume sets you have to manage the existing copies of each title and in addition to this you also have to manage the volumes of the set and their coherence (e.g. coherence of certain editions etc.).

Titles which have been pooled to form a multi-volume set are charcterized by a symbol of two consecutive documents (common title or part of a multi-volume series).

The following example shows the view "Catalogue – 07 Multi-volume sets" with activated preview.

Via the preview button from the menu bar you can split the view so the lower half of the screen shows the preview information of the currently selected title entry.

Illustration: View "Multi-volume sets" in preview

The headline shows the name of the corresponding author resp. title as well as signature data from main catalogue. In all view formats volumes with common title will be displayed. Additionally you can see edition and year of the volume.

5.4.2.1 Adding a volume to a multi-volume set

In order to add a volume to a multi-volume set, first select and highlight the corresponding title entry.

Then click the button "Catalogue – Add volume to multi-volume set". A **copy** of the selected entry will be created with the fields *Title* and *Volume serial number* left blank. All other data has been adopted from the original document.

The cursor is placed into the field *Title*. Now start with cataloguing the new volume.

Illustration: Form for cataloguing a new volume

Enter the name and number of the volume.

"Save" and "Close" the document by clicking the corresponding buttons. You will return to the previously selected view.

☛ **Note:** If you create a new volume via the button "Catalogue – Create duplicate" this volume will automatically be assigned to the set where you took the copy from. If the volume should be assigned to another set (e.g. another edition of the same title), finish creating the volume and then reassign it by using the action

Admin – Selected documents: Assign to a multi-volume set

Next, click the button "Catalogue – Multi-volume-set administration".

You will see a dialog box where you can sort the volumes of the set individually (see also 5.4.2.4, Sort order and hierarchy of multi-volume sets).

Illustration: Dialog box for administration of multi-volume sets

5.4.2.2 Assign titles to multi-volume sets

Besides cataloguing new titles you can also add entries already existing within the database to a multi-volume set. To do so, switch to view "Catalogue – 01 Catalogue by title". Select and highlight the corresponding entry you want to add to a set and select from menu:

Admin – Selected Documents: Assign to a multi-volume set

You will see a dialog listing all multi-volume sets within the database.

Illustration: Dialog box multi-volume sets

Then select the multi-volume set you want to assign the title to, expand the view by clicking the little green triangle (twistie) and select an arbitrary title. Confirm again with OK.

Automatically, the dialog to administer multi-volume sets opens.

Illustration: Dialog box to administer multi-volume sets

Within the main window of the dialog box you can see all titles currently assigned to this multi-volume set. The newly added title is marked by a preceding plus (+). Within the viewing window you can see bibliographic data concerning the last selected title.

The field *Common title* shows the title all volumes are identified by. You can specify another name into this field.

5.4.2.3 Common title and / or pool volumes to a multi-volume set

Title entries can be pooled together to form a multi-volume set. To do this, first select all desired title entries within view "Catalogue – 01 Catalogue by title".

Then select from menu:

Admin – Selected Documents: Link as multi-volume…

After you have confirmed the action you will see the dialog to administer multi-volume sets.

Specify a common title if needed and position the entries using the arrow buttons (see also 5.4.2.4, Sort order and hierarchy of multi-volume sets).

☛ **Note:** Another possibility would be to select the documents and use the button "Catalogue – Multi-volume-set administration". This option, however, only is visible from view "Catalogue – 07 Multi-volume sets" and can be used to pool volumes of different sets into a new set.

5.4.2.4 Sort order and hierarchy of multi-volume sets

In order to be able to recognize the common title of a multi-volume set, the corresponding volumes are shown with a higher indentation than the title itself.

Via the horizontal arrow keys the indentation of entries can be altered. The main entry is not indented, the individual volume entries can be indented via the right arrow button (the left arrow button decreases the indentation by one step).

Each mouse click shifts the selected entries by one level. Thus, you can achieve an optical hierarchy within views according to the multi-volume set's structure.

To sort the volumes of a multi-volume set you can use the vertical arrow buttons. With these you can specify the desired sort order of the volumes.

☛**Note:** To shift multiple volumes at once, provide them all with a selection tick and click one of the arrow buttons. The shifting operation is automatically done for all selected entries.

To shift entries over multiple positions within the list, you can use the double arrow symbol button.

Ex.: You want to shift entries 2-4 of the list each two steps down. First you select all three entries, then you click the double arrow key button.

You will see the following dialog box:

Illustration: Multiple position shift

Enter the number of positions you want the entries to be shifted. A preceding plus (+) results in shifting the entries down, a minus (-) shifts the selected entries upwards.

5.4.2.5 Management of volumes from different editions

Volumes assigned to a multi-volume set can be from different editions.

Thus, it is possible to display volumes hierarchically according to their edition. If volumes should not be displayed according to their edition, checkmark the control field *Show common title in views without edition.*

Illustration: Hierarchical display of different editions

If you want to display volumes including their edition, do not checkmark the control box. Within the field *Edition* you can see the current edition of the volume. By deafult this checkbox is activated.

Illustration: Management of multiple volumes from different editions

If, however, no editions are shown at all, this is because the volumes do not dispose of edition information. These information can also be entered at a later time.

Enter into field *Edition* e.g. "2nd ed." and confirm with OK. A dialog opens to manage the edition specification. Each confirmation corresponds to a single volume.

The following screenshot shows one of these confirmation dialogs.

Illustration: Edition renaming

Confirm with "Yes" each time you want the entry to be changed.

If several volumes of a multi-volume set come from different editions, the control box is automatically activated to signalize volumes come from different editions. They will be displayed in view "Catalogue – 07 Multi-volume sets" according to their edition.

Illustration: Multi-volume set displayed by edition number

If certain volumes from a multi-volume set should be altered according to their editions, you have to select the corresponding multi-volume set first.

Then you click the button "Catalogue – Multi-volume-set administration" within the symbol bar. You will see the dialog box for managing multi-volume sets.

Into the field *Edition* you can now specify your edition entry. Confirm the dialog with OK. For each entry you want to alter to the new edition setting, confirm the dialog with "Yes". Cancel changes to an entry with "No" and the previous edition setting remains intact.

5.4.2.6 Release volume from multi-volume set

A volume can at any time be released from a multi-volume set.

Select the corresponding entry within view "Catalogue – 07 Multi-volume sets".

Then click the button "Catalogue – Multi-volume-set administration". The dialog for managing multi-volume sets opens automatically.

Select the entry you want to release and click the button "Unlink volume". The corresponding entry will be marked with a minus sign (-). Once you confirm this dialog with OK, all entries disposing of a minus sign (-) will be released from the multi-volume set.

Illustration: Release volume from multi-volume set

5.4.2.7 Create copies for multi-volume sets

For each volume of a multi-volume set you can create an arbitrary number of copies (just as with monographs, see 5.4.1, Administration of single volume monographs).

After cataloguing a new title, click the button "Copy administration" to start managing copies for the title.

Alternatively you can also start managing copies from a view, using the button "Copy data – Select and edit copy...".

Create a new copy via the dialog. You will get an empty form for copy management. Provide it with a signature, select a location and specify a folder name, e.g. "Volume 1".

Then you can use the button "New volume" to create another volume.

Into the field *Serial copy number* you enter "1" again. Specify a signature and a location and type into *Folder* the new volume name, e.g. "Volume 2". For more volumes repeat this step over and over.

After you have created all volumes you can access the dialog "Edit copy" by using the corresponding button again.

Illustration: Dialog box Edit copy

In the left handed window you can see all titles belonging to a volume. The right handed window shows all volumes without volume title.

The preview button in view "Catalogue – 07 Multi-volume sets" shows all volumes belonging to a multi-volume set.

Illustration: Multiple volumes in preview

The preview shows all relevant data, e.g. number of copies, signature, lending status and location. Thus, lending of single volumes becomes possible.

5.4.3 Administration of series

All title entries from the main catalogue (single and multi-volume monographs) can be part of a series.

The view "Catalogue – 08 Series" shows all series which have been assigned one or more titles.

5.4.3.1 Add volume to series

If you specify a name within the field *Series title* (only available in extended form sheet), this title will be considered part of the series specified.

Via the pull down button next to the field *Series title* you can see a list of all current series titles within the catalogue. To assign the current entry to one of these series, select the series‘ name and confirm the dialog with OK.

Illustration: Select series title

From view "Catalogue – 08 Series" you can directly create a new volume for a series.

Select the corresponding serie within the view and click the button "Catalogue – Add volume to series".

The form for title entries opens, but the field *Series title* is already filled in according to the selected series.

5.4.3.2 Sorting series

Alike to different volumes of multi-volume sets, titles of series can arbitrarily sorted.

Select from view "Catalogue – 08 Series" an entry from the corresponding view and click the button "Catalogue – Sort serie volumes".

The dialog "Manage serie" opens.

Illustration: Dialog Series Administration

Just as with multi-volume sets you can specify the sort order via the vertical arrow buttons. Selected entries are moved together.

Via the double arrow button you can shift by multiple positions at once.

Unlike to multi-volume sets you cannot specify a horizontal hierarchy for series.

5.4.3.3 Release title from series

Series are kept together via the *Series title*. A title can be released from a series by simply changing (the title will be reassigned to another series) or deleting (the title will not be part of any series) the content of this field.

5.4.3.4 Create copies for series entries

For the creation of copies, affiliation with a series is unimportant. Copies are created in the same way as it would be done for a "normal" title of the corresponding edition type.

5.4.4 Administration of articles / jubilee publications

As with series, all titles from the main catalogue can be part of a jubilee publication. The field *Jubilee publication* within the extended form sheet controls affiliation with a jubilee publication.

Jubilee publications can be found in view "Catalogue – 09 Articles / Jubilee publications".

Illustration: View 09 Articles / Jubilee publications

Management of articles and jubilee publications is done in a different way, i.e. for this publication type there is no copy information as with multi-volume sets, series or journals, but administration of articles is done together with the title entry the article is part of.

As soon as a title document has been given a Jubilee publication name and has been saved, the form sheet shows a button called "Article / Article in jubilee publication".

Clicking this button opens a new form which can take the relevant data for an article, e.g. *Author(s)*, *Corporate body* as well as *Title* and *Subtitle*. The section *Internal information* can also be filled.

GeoCom® Library does not provide a sort function for jubilee publication articles. Sorting is done by a *Page* reference for each article.

Illustration: Form Article / Jubilee publication

5.4.5 Administration of serials

View "Catalogue – 10 Serials" holds all publications for which new volumes arrive at certain times.

The column heading "Subscr." shows, for which serials there are subscriptions. To mark an entry as subscribed, the checkbox *Continuation order* within the copy form has to be activated.

Illustration: Journal with subscription

Aside to the flag "Subscr." also the date of the last administration entry is shown within the view. The agent "Update view title" is required for an update of this information.

Principally there are two types of serials:

- **Journals,**
  for which new issues are expected in previously defined periods
- **Loose-leaf collections,**
  for which appearance of new issues does not apply to a specific periodicity

☛ **Note:** Within view "Catalogue – 06 Special publication types" you can view journals and loose-leaf collections separately.

5.4.5.1 Journals

For a journal, characteristically, new issues arrive in predefined periods. GeoCom® Library stores each subscription to a journal as an independent copy. The issues of this subscription are, however, stored as auxiliary documents in order not to be forced to create and maintain a new copy for each issue.

5.4.5.1.1 Create journal

To create a journal start with creating a title document (just as for every other type of book) within the main catalogue.

Click the button "Catalogue – New entry" from any view.

You can see the title form sheet, either the standard or extended variant, where you can specify the corresponding data.

The edition type for a journal should be *serial* with the edition subtype *journal.*

Illustration: Form New catalogue entry journal

Into the field *Title* you enter the title of the journal and possibly a *subtitle* for this journal.

☛ **Note:** If you do not specify a *Year* for this entry, it will be marked with a calendar symbol within views. If you enter a year, the entry will be displayed with a closed journal symbol .

Journals can be loose-leaf collections and journals at the same time (hybrid edition types). If a title is specified as journal AND loose-leaf collection, however, it can only be administrated as journal.

After saving the document the new entry can be seen in view "Catalogue – 10 Serials" or alternatively in view "Catalogue – 06 Special publication types".

As soon as you have created and saved an entry you can use the button "Copy administration" to start managing copies.

Alternatively you can also start copy administration by using the button "Copy data – Select and edit copy..." from any view.

Both ways, you will open the dialog "Edit copy".

Because a journal is most likely to have multiple issues per year and can have issues over several years, the left handed window shows the copies (i.e. the subscriptions made to this journal; journal A, journal B, journal C...) and the access numbers. The right handed window shows a list of years from which you can choose the desired year (e.g. year 1999, year 2000 etc.). Copies of one year are listed including signature and location data.

Entries marked with a <V> resp. <$> hold administration information (<V>) resp. accounting information (<$>).

Illustration: Dialog Edit copy

5.4.5.1.2 Create journal copy

To create a new journal copy, select the option "New copy" from the dialog "Edit copy".

Confirm with OK and you will get an empty form to fill in your copy data. Title data will be adopted from the corresponding title document and cannot be altered here! The *Serial copy number* automatically holds the next available value.

Fill in the copy data into the corresponding fields.

Specify, whether there is a subscription to this journal (in this case you have to checkmark the field *Continuation order*) and specify the frequency new issues arrive in.

Illustration: Form new copy journal

☛ **Note:** To create a new year for an existing copy, activate the option "new year" as well as "new copy" within the dialog "Edit copy". Then select the copy you want to create the new year for and confirm with OK.

Upon creation of a new year for a journal the number of the selected copy as well as certain data from the existing document will automatically be adopted. The following fields will be adopted:

- Signature
- Other signature information
- Main location
- Location
- Supplier
- Continuation order
- Order comment
- Order reference number
- Comments
- Subscription reference number
- Circulation
- Responsible

Illustration: Dialog Edit copy, create new year

5.4.5.1.3 Journal administration of issues

After you have created a copy of a journal, you can start managing incoming issues of this journal.

Use the button "Journal administration" to open the dialog "Journal administration". Alternatively, you can switch to view "Catalogue – 06 Special publication types" or "Administration – 01 Acquisition – e. journal delivery", select the corresponding copy and use the button "Copy data – Journal administration" to open this dialog.

Illustration: Dialog Journal administration

To create a new issue for this journal copy, select the option "new entry". Specify the delivery date and the journal edition name (e.g. "Issue 04/05").

Additionally, you can specify information regarding the status of the issue (e.g. "journal arrived").

Using the button "Adopt entry" the new issue will be added to the list.

☛ **Note:** Entries which have been newly added to the list are marked by a plus <+> symbol. These entries will be saved and stored to the list, once you confirm the dialog "Journal administration" with OK. Cancelling this dialog will result in loosing all new entries!

In order to alter an existing entry (e.g. when the status of the issue has changed from "jornal arrived" to "circulation"), select the entry you want to edit. Select the option "update selected entry" and specify your changes. Adopt the settings into the document by pressing the button "Adopt entry".

An entry that is not needed any more can be deleted from the list by pressing the button "Delete".

The entry will be marked with a minus <--> symbol. Upon confirming the dialog "Journal administration" by clicking OK, all entries marked with minus will be removed from the list.

Using the button "Print" you can store all entries in a mail within your personal mailbox.

Illustration: Dialog Print entries

☛ **Note:** Within the dialog "Journal administration" you can specify a binding status for this journal copy. Closed years can have a special status as well. This status "year finished" can be used to remove the administration entry from view "Catalogue – 10 Serials". Journals with the binding status "year finished" will only appear in view "Catalogue –

11 Title and copies".

☛ **Note:** If the option *Continuation order* has been activated within the copy document and a frequency has been specified, upon journal administration there is an additional field called *Next issue expected at*. This field will be filled automatically according to the configuration upon specifiying a new issue.

This field will be considered upon automatic deadline monitoring and can be displayed in view "Administration – 01 Acquisition – g. deadline detected".

5.4.5.2 Loose-leaf collections

Loose-leaf collections are, like journals, serials. Other than for journals, new issues for loose-leaf collections do not appear in predefined periods, but in irregular times.

5.4.5.2.1 Create loose-leaf collection

A title document for loose-leaf collections is created in the same way as a title document for a journal, except for the edition sub-type, which has to be "loose-leaf publication" instead of "journal".

Illustration: Section "Edition type" from title form sheet

☛**Note:** A title can be flagged as "journal" and as "loose-leaf publication" at the same time. In this case, the property "journal" has precedence over other edition sub-types.

5.4.5.2.2 Create loose-leaf copy

Once a title entry for a loose-leaf publication has been added to the main catalogue, you can start managing copy data.

Click the button "Copy administration" from within the title document to open the dialog for managing copy data.

Alternatively, you can use the button "Copy data – Select and edit copy..." from within a corresponding view.

Illustration: Dialog Edit copy

Select the checkbox "create new copy" to create a new entry.

For information on creating copies, please refer to 5.4.5.2.2, Create loose-leaf copy.

☛**Note:** To edit an existing title, do not select the checkbox "create new copy", but select the copy you want to edit.

☛**Note:** If you want to add a new year to an existing copy, activate the checkbox "create new copy" and additionally the checkbox "new volume / folder".

5.4.5.2.3 Management of loose-leaf issues

New issues of loose-leaf collections are managed in exactly the same way as it is done with journals.

From the opened copy document, click the button "Loose-leaf administration..." to open the dialog for loose-leaf administration, or select the desired title within a corresponding view and click the button "Copy data – Loose-leaf administration..." to open the dialog.

The dialog Loose-leaf administration is nearly identical to the dialog journal administration, except for the following:

Within the dialog loose-leaf administration, there is no field which shows the expected date of the next issue, even if the loose-leaf copy has been marked as continuation order. Further, the fields "Circulation" and "Binding status" are missing within loose-leaf administration.

Illustration: Dialog Loose-leaf administration

The button "Adopt entry" will adopt the data from the fields "Date", "Edition" and "Additional information". Depending on the setting, this will create a new entry (option "new entry") or update the selected existing entry (option "update selected entry").

Newly created entries will be marked by a plus symbol <+>. These entries are not yet saved, but will only be saved if you confirm the dialog with OK. Cancelling the dialog will result in loosing you newly created entries.

The "Delete" button lets you mark all selected documents for deletion. These entries will be marked with a minus symbol <-->. The actual deletion of the documents will be done if you confirm this dialog with OK.

Just alike to administration of journals, all current entries can be copied to a mail template within your personal mailbox using the "Print" button.

6 Administration

The group of views "Administration" holds views and actions for managing certain tasks, like e.g. acquisition or lending of copies.

6.1 Acquisition

Copies can be ordered permanently for the stock of books or temporarily as trial orders. A list of all copies within acquisition, you will find within the group of views "Administration – 01 Acquisition".

You wil find the following views here:

a. orders
b. copies in acquisition
c. trial orders
d. continuation orders
e. journal delivery
f. loose-leaf delivery
g. deadline detected
h. order templates

6.1.1 Orders

Publications which are intended for acquisition can be ordered from the corresponding suppliers. Already upon creation of copies, these can be provided with the status "intend to order".

Orders for suppliers can be created freely or using a previously defined order template which can greatly ease your daily workflow.

Because the usual procedure is to create orders via templates, this procedure shall be described in the following.

☛ **Note:** From within the view "Administration – 01 Acquisition – a. orders" you can use the button "Accessions list..." to open the dialog "Accession list". Here you can specify a period from which you want to list accessions.

Illustration: Dialog Accession list

6.1.1.1 Create order template

To create an order template first switch to view "Administration – 01 Acquisition – h. order templates".

Click the button "New template – Standard order" to open an empty order form, where you can specify your data.

Illustration: Order template

Into the field *Subject* you could e.g. enter the name of a supplier. All future orders from this supplier can then be eased by using this template.

The postal address of a supplier or publisher can automatically be adopted via the corresponding buttons.

Additionally you can enter a letter text including your company address, logo etc.

Save the document in order to make it available as a template.

The new template has been added to the database and can now be viewed from view "Administration – 01 Acquisition – h. order templates" or used from any view in "Administration – 01 Acquisition".

6.1.1.2 Create order using an order template

After you have created an order template, switch to view "Administration – 01 Acquisition – a. orders".

Click the button "New order" within symbol bar. A dialog opens:

Illustration: Dialog New Order

Orders can be made from multiple suppliers. Thus, you can select the corresponding supplier for each order via the selection field *Supplier*. After selection, only the entries available with this supplier will be shown.

☛ **Note:** The last selected supplier will be shown upon opening the dialog box.

In order to list all available titles, select the asterisk symbol "*" as supplier. This will result in listing all available titles.

After you have selected a supplier you can specify whether multiple copies should be ordered separately.

Within the lower window you can see all available order templates. Select the corresponding template from the list and confirm with OK.

The selected order template will open, already including the booklist of copies you have selected for ordering.

The administration (header) section of the form can hold metadata, e.g. title name of the copy etc. This header section will not be printed.

Via the "Calendar" button you can open the calendar function. By selecting a date, you can provide the document with a re-submission date, by which the planned action (e.g. order) has to be performed.

☛**Note:** An order created via an order template can arbitrarily be edited. Changes will only be adopted to the order document, the template will not be altered hereby.

After you have saved your document, you can view it from within "Administration – 01 Acquisition – b. copies in acquisition".

In order to directly flag a copy as ordered, use the corresponding button within symbol bar.

To print a preview, click the button "Print".

6.1.1.3 Create order template using MS-Word

Alike to book lists, you can create order templates using an MS-Word template.

Click the button "New template – Microsoft Word" from view "Administration – 01 Acquisition – h. order templates".

Specify a name for this template and select the option "Orders".

Into the field *Settings* you can put information on how the template should be used.

Possible entries for Settings **:**

NO = consecutive number

TI = title entry with all information

TY = order type

CO = count

AU = author

Example:

An order should contain the following fields:

Consecutive number / title / order type / count

Enter into the field *Settings*:

Fields:NO<>TI<>TY<>CO

Make sure, the data starts with the designator "Fields:" followed by the field entries.

Due to technical reasons NO data is allowed at the end of an entry!

You can use an arbitrary number of fields for your order, even all field names are allowed at the same time.

After you have specified all settings, click into the RTF-field below, so the cursor is blinking there. Then select from menu:

Create – Object

You will see a dialog box which helps you to create a new Word document. Select the option "Object" to create a new object.

From the lower window you can select the object type, in this case Microsoft Word document. Also activate the checkbox "Display as icon".

☛ **Note:** To use an existing Word document as template, select the option "Object from file" and the corresponding folder.

MS Word will be started. Write your order as you are used to when working with Word. At the end of your order text you have to enter a table consisting of a single row. Select from menu:

Table – Insert table

Make sure the table only holds one single row. The number of columns can be specified as needed for the template.

Then select from menu:

File – Close and return to application

You can now save your MS Word template into the Notes document.

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First click the button "Save" and after that you can use the button "Close". To open the template again, simply doubleclick it.

Click the button "Edit" from within the template to open the Word template using MS Word.

You can now edit or print the order at will.

☛**Note:** Even if you have made changes to the Word document, you can leave the text processing application via the command

File – Close and return

Back in Notes, you can save the changes to the template by using the button "Save".

6.1.2 Fast order

In addition to the described process to order copies, GeoCom® Library provides you with a special form, by which you can prepare acquisition of titles and/or copies in an easy way.

Via the button "Copy data – Prepare acquisition" you can open the order form. Depending on whether or not you have selected an existing title from the main catalogue, you can order a copy to this title or you can create a new title including order of a copy.

☛**Note:** All copies ordered this way will be provided with the status "intend to order" and can be seen from view "Administration – 01 Acquisition – b. copies in acquisition".

6.1.2.1 Order copy of an existing title

If a title document had been selected before using the button "Copy data – Prepare acquisition" automatically a new copy to this title will be created. Title data is not editable in this case, only copy data can be provided.

Confirm this dialog with OK to create the corresponding copy document.

Illustration: Dialog Prepare acquisition

6.1.2.2 Create new title and order copy

If you want to order a copy of a title which is not yet available within the main catalogue, do not select a title document (e.g. select a main document or a comment) and click the button "Copy data – Prepare acquisition".

An empty order form will open. You can enter all relevant title and copy data into this form.

Upon confirming this dialog with OK, the title document as well as the corresponding copy document will be created.

Illustration: Dialog Prepare acquisition, create title

After you have confirmed the dialog, another dialog will appear, asking you whether or not you want to create another copy to this title.

Illustration: Dialog Order another copy

6.1.3 Copies in acquisition

A detailled overview of acquisitions can be found in "Administration – 01 Acquisition – b. copies in acquisition". The view shows the following criteria, and can be sorted via the columns:

- intend to order
- ordered
- query
- returned
- supplied

The column headings within the view show order number, order date, order status, author's name and maybe comments.

Via the "Expand" symbol within symbol bar the view can be expanded so single entries can be viewed.

Illustration: View Copies in acquisition

The view shows a detailled list of all orders, separated by publishers, resp. suppliers. Further, it shows which titles have already been ordered, which ones are only trial orders and which orders have been queried. Additionally, order date as well as an order number are shown.

Via the preview button you can view the currently selected entry within the preview window. By double clicking an entry, it will be opened for editing.

The status of supplied orders can be changed by editing the document to another status.

6.1.3.1 Mark copy as "ordered"

After an order has been performed, the corresponding copies have to be marked as "ordered".

This is especially important to inform employees about which copies already have been ordered, so a copy is not ordered twice.

If a copy has been ordered, click the button "Mark copies as ordered".

A dialog opens. Confirm this dialog to set the corresponding copy's status to "ordered".

The view "copies in acquisition" only shows an order number, if the corresponding copies have been marked as "ordered".

6.1.3.2 Send order via e-mail

In addition to the possibility to print orders, they can be directly sent to suppliers via e-mail.

To send an order via e-mail, first create the order document. Then select from menu:

Actions – Forward

Your personal mailbox opens:

Illustration: Order via e-mail

Via the address button you can adopt the supplier's e-mail address from your personal address book. Alternatively, you can specify the recipient's mail address manually.

The order has already been attached to the mail.

6.1.3.3 Save order documents as templates

Already existing orders can also be saved as order templates.

Simply click the button "Save as Template" from within the order document. The following dialog opens:

Illustration: Dialog Naming order template

Specify a name for this template and confirm with OK. See also 6.1.1.1, Create order template.

6.1.3.4 Create accessions list

A list of all accessions can be prepared, by using the corresponding button "Accessions list…" from symbol bar. Via the calendar functions you can specify the period. The option "first accessions only" results in multiple copies of the same title only to be displayed as one single entry.

Illustration: Accessions list

Book lists can be attached to an order and can be sent via postal or electronic mail. Besides, these can be printed directly also.

6.1.4 Trial orders

Copies can be ordered as trial orders. This remark will be made upon administration of the copy.

View "Administration – 01 Acquisition – c. trial orders" lists all trial orders within the database.

Illustration: Trial orders

All listed copies show the order date as well as the person's name for whom the corresponding copy has been ordered for trial.

Via the button "Reminder" you can create a mail within your personal mailbox with a reminder to the person to return the book.

The text and subject for this e-mail can be defined within the global configuration document by an administrator.

In addition, it is possible to configure mails with reminders for suppliers, including placeholders for title, author etc.

To reach the global configuration document, you must have administrator rights. Then switch to a view in "Catalogue…" and select from menu:

Actions – Admin – Configuration

6.1.5 Settings for deadline monitoring

Also within the global configuration document you can configure overdue times after which late delivery of journals etc. will be mourned.

Illustration: Deadline configuration

Deadline settings can be specified for journals, loose-leaf collections and orders.

6.1.6 Journal and loose-leaf delivery

Within view "Administration – 01 Acquisition – e. journal delivery" you find all journal copies from the main catalogue. From here you can perform journal-specific actions, such as journal administration etc.

In the same manner, view "Administration – 01 Acquisition – f. loose-leaf delivery" shows you all loose-leaf publications including the loose-leaf-specific actions.

See also 6.1.6, Journal and loose-leaf delivery.

View "Administration – 01 Acquisition – d. continuation orders" shows you a list of all copies, for which the field "continuation order" has been activated and which, thus, are active abonnements.

6.2 Lending

All copies with the base lending status "Bibl. lending collection" are free for lending by employees.

Only those copies can be lent which dispose of the status "supplied" or "catalogued".

Other copies are not free for lending, because they belong to the local present stock.

6.2.1 Views

The group of views "Administration – 02 Lending" provides you with three sub views to monitor lending transactions.

View "a. employees" holds a list of all persons who may borrow copies. Other users cannot borrow copies from the library.

View "b. borrowed copies" lists all currently borrowed copies, i.e. all copies disposing of the status "borrowed at…".

Finally, view "c. all transactions" shows all current lending transactions as well as all past lending transactions and thus forms a lending history for librarians.

6.2.2 Administration of employees

In order to be able to borrow copies from the lending collection, an employee has to be added to the list of allowed borrowers.

To adopt an employee from the personal names and address book, click the button "Pick address from PAB". The current Notes address book is opened from which you can select and adopt an entry.

Via the button "Edit document" you can open the currently imported entry for editing. Maybe you have to add some specific information.

To add a person who is not available within the Notes address book, click the button "New address entry". An empty employee form opens, where you can specify the data of the employee.

The short form of the employee's name is of special importance, as it is used to identify the employee upon lending transactions.

6.2.3 Lending copies

After the desired title for lending has been found (search by title, by author, OPAC etc.) the document preview can show the current lending status of this copy. The lending status will also be shown upon OPAC research.

If the corresponding title is not yet borrowed but part of the bibl. lending collection, the copy can be borrowed.

First select the corresponding title within a view, then click the button "Lending" from symbolbar. The following dialog opens:

Illustration: Dialog Borrowing

First enter the Barcode number resp. the access number of the corresponding copy into the upper left field and hit RETURN.

Once a title has been found, the bibliographic information will appear in the lower left window. Barcode number will be highlighted.

Into the same field enter the short name resp. the Barcode number of the employee who wishes to borrow the copy and hit RETURN again.

In the lower right window you will see the currently borrowed copies by your selected employee.

Via the button "Check out" you can then perform the lending transaction. Confirm with OK, the status of the copy will be changed and now be displayed as "borrowed".

If another employee tries to borrow the same copy via barcode, the transaction cannot perform, because the copy is borrowed.

The checkboxes "check in automatically" and "check out automatically" are used for automatic data adoption via barcode scanner etc.

6.2.4 Returning borrowed copies

Returning copies is done similar to borrowing copies. First enter the barcode or access number of the copy into the upper left field. Within the upper right field, the name of the current borrower will be shown. Confirming with RETURN will show the bibliographic data within the lower left and the borrowed copies of this employee in the lower right window.

Now click the button "Check in". The copy will be removed from the employee's lending account. Confirm with OK again to reset the copy's status back. The copy can now be borrowed again.

☛ **Note:** Via the calendar function the date of a transaction can be specified. The current date is automatically inserted.

6.3 Circulation

Administration of circulations will be assisted by a group of views for this purpose. With these you can create an overview of all circulations as well as easily determine in which circulations each employee takes part.

6.3.1 Creating circulation

To create a circulation slip, first select the view “Administration – 03 Circulation – a. copies with circulation entry".

Then checkmark the corresponding journal and click the button "Copy data – Prepare circulation slip".

The following form will appear:

Illustration: Form Circulation slip

The text fields for the circulation slip can be configured within the "configuration document", like e.g. title of circulation, header 1, header 2 etc.

Within the section "customer specific english prompts" the configuration can be set. The following settings are possible:

UM_INFO1: ShortTitle = Information to the title

UM_INFO2: LLDTextList = Issue XX Info

UM_INFO3: LLDDateList = Date Info

UM_INFO4: Responsible = Responsible

Illustration: Configuration document: Settings for “circulation“

Alternatively it is possible to create circulation slips by using the word processing system MS-Word. For this, analogous to orders, a template with bookmarks for title, circulation list etc. has to be created.

Illustration: Notes-template and circulation slip in MS-Word

6.3.2 Printing circulation

Within the administration process of journals it is possible to print out a circulation slip using the action “Print circulation”. For this the dialog box has a specific checkbox "print circulation".

Illustration: Dialog Journal administration with checkbox "Print circulation"

To print the circulation slip, confirm the dialog "Journal administration" with OK. The information about circulation entries can only be printed, but not be saved.

6.3.3 Removing names from circulation slips

If an employee quits a circulation, you can use the action

Admin – Selected documents: Field search and replace

in order to delete his or her name from all circulation lists.

Illustration: Dialog Global search and replace

Illustration: Dialog Remove employees from circulation slips

In case a name should not be replaced by another one, but deleted from the list, you have to replace the name with an empty string. Just enter two inverted commas into the “Replace”-field:

Illustration: Dialog Global search and replace

Illustration: Cancel name from circulation list

6.4 Book lists

Aside from creating book lists within OPAC it is possible to create book lists manually.

In order to create a book list change to the view "Administration – 04 Book lists – a. documents".

New book lists can be created using the button "New book list" from symbol bar. A form is opened containing a table-like list, where you can enter new titles. Hitting RETURN will expand the book list by one entry. Additionally, comments or further remarks can be specified.

After you have specified a name for the book list, you can save it by clicking the "Save" button. The new book lists will automatically be shown in view "04. Book lists – a. documents".

Illustration: Book list

To edit existing book lists, select the corresponding entry and click the button "Edit document" to open the document for editing. After you have specified your changes, you have to save the document again.

☛**Note:** A book list can also consist of selected copies rather than titles. Book lists are stored in RTF data format and thus can arbitrarily be edited. An unlimited number of book list entries can be made.

6.4.1 Creating MS-Word template for book lists

To create a new template for book lists using MS-Word, switch to the view "Administration – 04. Book lists – b. book list templates".

Click on the button "New template – Microsoft Word" within symbol bar. The following view is displayed:

Illustration: Template book list Microsoft Word

First, assign a name for the new template, e.g. “Research results”.

Clicking on the pull-down-menu next the field "Status" will open a dialog box. Select from the list a corresponding entry, e.g. "under construction”, "done" etc. The status "under construction" is preselected. To adopt it to the template click OK.

Then, checkmark the option “book list” within the field "Template used for".

Within the field "Setting" the different possible entries for the settings for book lists can be filled in. It means using the settings described in the following allow you to determine which field the book list should contain.

Possible Entries for Settings:

NO = serial number

SI = signature

SL = signature for label

AU = author

TI = title entry with information

XXXXX = Field content XXXXX

☛ **Example:**

In order to create the list showed beneath, you have to enter the string:

Fields:TI<>ExStatus_uk<>Supplier<>ExDate

Pay attention to the way you enter the settings: First, enter the word "Fields", and then enter the corresponding settings (TI; ExStatus_uk, Supplier, ExDate etc.). Due to technical dispositions you **should not** enter any signs and symbols at the end.

Book lists are freely configurable; this means that it is possible to assign all settings to one book list.

Fields that do not contain a value (setting) act as a placeholder. This book list might look as follows: serial number, vacant field, signature, vacant field, author, vacant field etc.

Fields:NO<><>SI<><>AU<>TI

After fixing the settings for the book list, click into the rtf-field.

Then, select from the menu bar:

Create -- Object

The following dialogue box pops up:

Illustration: Creating new object

First, checkmark if a new “Object", an "Object from a file" or a new “Control" is to be created. The object type "Object" is pre selected.

Then, select the object type using the scroll bar in the window below. Select - as shown - Microsoft Word Document and checkmark the field "Display as icon". Finally confirm with OK.

Now the text processing program MS-Word starts up. Begin the creation of a new book list by inserting a table first. To do so, select from the menu bar:

Table -- insert table

It is necessary for the table to show only one line. However, the number of columns may vary. In this case the book list contains four columns (title / ordered / publisher / date).

Illustration New template (book list) MS-Word

To return to Lotus Notes select from the menu bar:

File -- close and return to <a description for the document>

Then, save your template.

Under view "04. Book lists – b. book list templates" you can see your template under category Book list Microsoft Word.

☛ **Note:** Book lists created by MS-Word can be opened by a double click from this view.

To return to Lotus Notes select from the menu bar:

File -- close and return to <a description for the document>

6.4.2 Creating new book list by using MS Word template

After creating a template for a book list it is possible to assign as many titles as you want. To do so, switch to the view **01. Catalogue a. by title** and checkmark those titles you want to add to the book list.

In order to print the list, click on the button "Prepare printing" within the symbol bar.

The following dialogue box appears:

Illustration: Dialog Select print form

From the box select the corresponding form. The option “Book list” is preselected. However, using the pull-down menu you get a list containing other printing forms.

Next, specify your sorting preferences, e.g. to print the book list sorted by authors etc. Checkmark the field "Show copy data" if you want to print information on the copy data. The following checkbox lets you specify whether multiple copies should only be adopted once into the book list, or each selected copy should be added to the book list.

Finally specify the font type and confirm with OK.

6.5 Correspondence

GeoCom® Library has a feature for standard correspondence or for orders. This is useful for the organization of correspondence, e.g. letters, complaints etc. All activities dealing with correspondence can be done without switching to other word processing systems.

For the administration of correspondence change to the view "Administration – 05 Letters – a. documents".

Click on the button "New document…" in order to reach the following dialogue box.

Illustration: Dialog Select form

First select a form type and then a corresponding template. Confirm the selection with OK to get the selected template. Now you can start editing the template, enter a subject and save it. The original template will remain unchanged.

☛**Note:** If you have created this document as "Standard correspondence" it will be seen within this view after saving. Documents, which have been created because of an order list, a book or circulation list, will be found within the corresponding views.

6.5.1 Creating new letter template

Using different form sheets can administer the process of correspondence and order.

Switch to the view "05 Letters – b. letter templates".

Illustration: View "Administration – 05 Letters – b. letter templates"

Click on the button "New template – Letter" within the symbol bar in order to get an empty form sheet for a new letter template.

Illustration: Template outgoing correspondence

First, specify a subject in the template's headline, it means which name should be assigned to template for saving. Using Lotus Notes' address book you can select the editor as well as the reader. Preselected is the user's name who has registered with his/her personal ID-no. However, it is possible to select another person who should be the editor of the document.

In order to change a name, click on the pull down button next the field "Editor" respectively "Reader". Select from the Note's Address book the name and confirm with OK.

The field "Status" provides another pull-down-menu that contains options to assign the documents' status. Select one status from the list and confirm with OK. The selected item will be adapted to the template.

Then insert a name for the template using the field "Template description".

Begin to fill in - where required - the companies' logo .
The postal address can be adopted - if stored in the database - into the letter template.

By clicking the button "Publisher address" or "Supplier address" you can either reach the publishers list or suppliers list. By confirming with OK the corresponding data is adopted to the new template.

Finally insert the sender's address and letter text.

Then save your document.

The new generated template it stored in the database and can be opened from view "05 Letters – b. letter templates" or used from view "05 Letters – a. documents".

6.5.2 Creating new letter using MS-Word template

Beside the possibility to create book lists and orders by using MS-Word templates you can create letters using a MS-Word template.

To do so, select the view "05 Letters – b. letter templates" and click on the button "New template – Microsoft Word". Assign a name for the template and checkmark within the field "Template used for" the option "correspondence".

After clicking into the rtf-field, select from the menu bar:

Create -- Object

A dialogue box pops up. Checkmark the option "Object". Then, select the object type using the scroll bar in the window below. Select Microsoft Word Document and checkmark the field "Display as icon". Finally confirm with OK.

☛ **Note:** However, if you want to work with an existing document, checkmark the option "Object from a file" and select the corresponding file.

Now the text processing program MS Word starts up. Begin to create a letter that is to serve as a template.

To return to Lotus Notes, select from the menu bar:

File -- close and return to <a description for the document>

You can now save and close the template within Notes.

Letter templates created by MS Word can be opened with a double click.

Hit the button "Edit" to make any changes. Double clicking the Word icon will open MS Word. Edit and / or print the template as usual.

6.6 Inventory

Basically, an inventory with GeoCom® Library is done as follows.

To determine the time frame, employees involved and procedure of the planned inventory, a definition document has to be created by an administrator first.

The inventory itself can be performed by previously defined employees and can be done via barcode scanner, manual insertion of access numbers or via full text search.

At any time reports can be generated informing about the progression.

The administrator has the possibility to delete an inventory (including all corresponding documents).

6.6.1 View Inventory

All documents created during an inventory action will be saved to the view "Administration – 06 Inventory" and can be viewed or edited from there.

There are three different kinds of inventory documents:

1. stock taking definitions
2. sessions
3. reports

For each inventory there is only one definition document determining the frame conditions for the inventory.

After each inventory session, a session document is automatically generated protocolling the inventory process.

Report documents can be created manually at any time during the inventory to document the current status of the inventory.

Within "Administration – 06 Inventory", reports and sessions will be sorted by date and shown categorized by the corresponding inventory definition.

Illustration: View "Administration – 06 Inventory"

6.6.2 Inventory definition

Before starting the inventory, a document has to be created determining the frame conditions for the inventory, e.g. period and employees involved. You need administrator rights to create an inventory definition.

Switch to view "Administration – 06 Inventory"

Select from menu:

Actions – Admin – Create stock taking definition

Provide a name for the definition and set the parameters.

Illustration: Form Inventory definition

Specify the period for this inventory. By default the starting date will be set to the current date.

Via checkboxes you can determine how copies are to be identified for the inventory. Identification via barcode is preselected, because usage of a barcode scanner is the most comfortable procedure. Additionally, you can accept identification via access number or full text search.

Finally, you have to specify, which employees should be responsible for this inventory.

Except for the inventory name, all data can be edited and altered in a later stage of the inventory.

6.6.3 Stock taking actions

To start an inventory, select the inventory definition and click the button "Inventory – Take to stock".

☛**Note:** If you do not have selected a definition document, when clicking the button "Inventory – Take to stock", a dialog opens from which you can select the definition you want to use.

The following dialog will open:

Illustration: Dialog Inventory

First select the identification method you want to use. Then enter the corresponding numbers into the field "Copy ID" and click OK.

Copy data of the corresponding copy will be shown in the lower half of the dialog window.

Clicking the button "Take to stock" will add this copy to the inventory list.

If you perform identification via barcode you can automatize inventurizing. Activate the checkbox "automatically add to stock after carriage return". Copies will then be taken to stock once you confirm their identification with OK. Make sure the barcode scanner you use is configured accordingly.

Upon usage of full text search you have to select the corresponding copy from the result list. After that you can use the button "Take to stock".

Illustration: Dialog Inventory, identification via full text search

☛**Note:** Only copies with status "catalogued" or "not found" will be considered upon stock taking.

Use the button "Cancel" to stop an inventory session. A session document will automatically be generated, showing the editor's name as well as time of stop and number of copies in stock.

Session documents cannot be deleted separately, but only in combination with the complete inventory.

6.6.4 Reports

At any time you can create a report about the progress of the inventory. Select an inventory document and click the button "Inventory – Report".

A dialog opens and provides you with the following options:

- Selection of copy types within report (only inventoried copies, only not inventoried copies, all copies)
- Additional condition (e.g. location or classification)
- Selection of columns and tab positions

After confirming with OK, the report will be created.

Illustration: Dialog Report Options

Report documents can not be deleted separately, but only in combination with the full inventory.

6.6.5 Deleting inventory data

Single documents from an inventory cannot be deleted separately. To delete all documents from an inventory, you need administration rights. Select the inventory definition you want to delete and select from menu:

Actions – Admin – Remove inventory data

All documents belonging to this inventory will be deleted.

Illustration: Dialog Deleting inventory data

6.6.6 Stock taking by auxiliary personnel

Administration (i.e. creation/definition and deletion) of inventories can only be done by an administrator. Normal users do not have access to view "Administration – 06 Inventory".

To allow auxiliary personnel to perform an inventory action, a corresponding action is available within all catalogue views for normal users. A normal user needs database access as author including the right to create documents. Further, the user has to be listed within the employee list of the inventory definition.

Select from menu:

Actions – Admin – Take to stock

If multiple inventories are available, a dialog will appear, asking the user to select the corresponding definition document.

Illustration: Dialog Select inventory

If the user is not listed within the employees section of the selected inventory definition, an error message will appear.

6.7 Statistic reports

This feature makes it possible to create detailed statistical overview to the following themes:

- Publication year
- Copy status
- Main location
- Main and local location
- Area
- Classification level 1
- Classification level 1 and 2

Statistical overviews can be created automatically at the end of each month.

Via the button "New statistic report" you can open a dialog from which you can select, which databases the statistic report should include and which criteria should be used to create the report. If you confirm this dialog with OK, the report will be created.

Illustration: Dialog Create statistic report

7 Maintenance

The group of view "Maintenance" provides you with views and actions for technical maintenance of the database itself.

7.1 Index lists

The group of views "Maintenance – 01 Index lists" holds the proposal lists for title recording. These lists include:

a. Author
b. Corporate body
c. Series

d. Location

From within these views, you can only view the lists, but not edit them.

User with corresponding access rights have the possibilty to update index lists. To do so, select from menu:

Actions – Admin – Database: Update index Authors / Corporate bodies

From within the views "c. Series" and "d. Location" you can access corresponding actions to update these index lists.

Illustration: View "Maintenance – 01 Index lists – a. Author"

7.2 Configuration (Backup)

Upon each saving action of the global configuration document, a backup copy is stored to the view "Maintenance – 02 Configuration (backup)".

Date and time of the saving process as well as last editor of the configuration can be used to identify a configuration backup.

Illustration: List of configuration backup copies

To view a backup copy, open it by double clicking it. The backup will be shown in form of a non-editable configuration document.

You can restore the backup copy to the global configuration document by using the action

Actions – Admin – Restore configuration

A warning dialog will appear indicating that the current configuration will be lost and overwritten with the data from the backup. This process cannot be undone, once you confirm this dialog with "Yes".

Illustration: Warning dialog Restore configuration

7.3 Replication conflicts

A replication conflict occurs, when a document is opened for editing by two users at the same time and both users save different changes to the document. For each such saving trial a conflict document will be generated instead of overwriting data.

The sub view "Maintenance – 03 Replication conflicts" shows all replication conflicts within the database.

Illustration: View "Maintenance – 03 Replication conflicts"

As this is not a normal Notes view, but a folder containing data, the refresh of the view cannot be done automatically.

With the button "Refresh folder" the database will be searched for replication conflict documents.

Note that this action may be time consuming as the whole database has to be searched for conflict documents!

For each replication conflict found, the main document as well as the conflict document will be shown. Use the button "Compare documents" to compare the fields of the documents.

All differences in fields will be shown, so you can decide which data is relevant for the main document. The main document can be edited accordingly and the conflict document can be deleted.

8 OPAC

The library management system GeoCom® Library has the OPAC

(**OPAC – Online Public Access Catalogue**) at your disposal. This feature is for both, the library staff and for the user.

8.1 Format display

The way to display the copy format can be configured according to librarians and users. This refers to the preview, OPAC etc. Hereby it is possible to configure the format display according to RAK or as a tabular format.

Illustration: Configuration Format display

8.2 Search box

To open the search box click on the button "OPAC" within the symbol bar.

Illustration: OPAC search box

The OPAC search box for librarians count with nine different fields, for optimising the search activities. The OPAC search box for user count with six fields for search activities. The search results can show - if configured - the location of the search database (BO = Bochum; DUS= Düsseldorf; etc.).

The option “Find in all fields” enables the search in the complete stock in all fields. A specific library research can also be conducted through the field “titles”. Furthermore it is possible to limit the library research regarding specific options, for instance to search only at selected locations, or regarding publisher's data. Using the pull-down-menu next the field "only in keys" you'll get a dialog box, offering a list of keywords. Select one keyword by one mouse click. To adopt it into the OPAC search box confirm with OK.

It is also possible to manage your research more effectively by using additional fields in order to specify type of publication, e.g. single volume monograph or multi volume monograph as well as to specify if the publication you're searching for is a yearbook, loose-leaf-publication etc.)

Additionally the OPAC search box provides a "special field". Next this field you'll have a pull-down-menu. This menu offers you a list of field names within the documents. Select one option to search only within those field names that you previously selected. It is possible to search only for a special item or a word.

Example: You want to find only those titles that show within the field "parallel title" the term "economy". To do so, first select from the pull-down-menu next the field "special field" the option "parallel title" a fill into the last field the word "economy". The search result should list only those publications that have the term economy as "parallel title".

Beside this it is also possible to list only those titles that have for instance within the field "price" 25 EUR. Select from the pull-down-menu next the field "special field" the option "price" and fill into the last field the number "48". The search result should list only those publications that have the number 25 EUR within the field "price".

The following fields are indexed: "Author", "Subject heading", "Media", "Edition type", "Edition subtype".

By clicking the "Help" button you’ll get online-support, providing important and useful hints and information on the search via OPAC.

A single click opens the online-support. Another click hides the text.

8.3 Search options

Within the process of library research you can use truncations. Use the asterisk '*' wildcard character in well known fashion to extend your search pattern; use the question mark '?' as a placeholder for a single character.

The use of the Boolean operators (**AND, OR, NOT**) allows for a limitation and filtering of the search process. The entry of terms is case insensitive. Alternatively the operator "**AND**" can be replaced with a semicolon "**;**".

Using the field "find in all fields" you can select between different locations. Hereby you can start your search in only one database or extend it over all connected databases. The number of hits will be indicated within the window beneath the different optional fields of the OPAC search box. The search results consist of the number of all hits found as well as the hits respectively to their locations.

Example: The number of hits for term "economy*" at all locations is 100. From these 100 hits, 57 are found at the location BO, while at the location HH there are 0, the location DUS contain 33 and the location FRA has 10 titles dealing in some way with "economy". If the checkbox "number of hits in alphabetical order" is not marked, titles will be listed corresponding to their locations.

Illustration: Library research (with wildcard *) / search in database

☛ **Note**: The search using semicolon can be realised in all fields, while search using the Boolean operators only can be realised in the field "Find in all fields"

The following pattern is an example of a combined library research.

Enter the field as follows:

First term / space / combination / space / second term

e.g. economy **AND** society

Illustration: Search option using "AND" combination (Boolean operators)

Confirm your search by clicking the button "OK" or by pressing the return key. The databases will be checked for the term and the number of hits found will be shown in the box at the bottom. The hits will be listed corresponding to their prioritisation.

☛ **Note**: By default the option “Pre-sort results by ISBN” is selected. Pre-sort by ISBN means the possibility to concertedly present title entries with identical ISBN.

Example: If a search yields **three** titles with identical ISBN and one copy each (for example the same title is available at three different locations), then the result set will show only **one** title with three copies.

The pre-sort can especially be useful while starting search requests over multiple locations (databases). The search in a single database normally yields the same result with, as without pre-sort by ISBN, as here instead of multiple records of a title with identical ISBN, copies should be entered.

Within the OPAC search box you can specify whether or not you want to pre-sort your result set.

8.4 Displaying search results

As soon as the hits found are listed in preview, you can select one ore more items from the list. Entries can be selected one by one with a mouse click. Selected entries are marked with a little symbol. In addition, to every selected publication a short entry, consisting of title, author / publisher as well as edition and date of publication is shown. Depending on the selection the number of copies, the signature, the status and the location are shown at the bottom.

Illustration: Preview short entry

By clicking the button "Select all hits" it is possible to mark all search entries with just one mouse-click. By clicking the button "Remove selection" it is possible to cancel the selection.

It is possible that a search respectively a term produces more than 100 hits, listed. As soon as all terms are found automatically two buttons appear within the OPAC search mask. By using these two buttons you can visualize hits "en bloque" or in form of a packages containing each 100 hits. By clicking the button you'll skip to the next 100 hits.

Using the arrow buttons you'll move 100 positions foreward or backward.

In order to reset the last search term and to start a new search click on the button "New search". You'll get an empty OPAC search mask.

☛ **Note:** It is possible to sort result sets in OPAC electively by title, year, author, classification or relevance. A search over multiple locations will collect all copies under one title.

Illustration: OPAC dialogue box with results from multiple locations

☛**Note:** You can sort your results by different categories:

- Year
- Author
- Title
- Classification
- Relevance

To force sorting of results, first select the category from the selection field, then confirm with OK. Results will be sorted by the selected category.

8.5 Editing copies found by OPAC-search

If one entry is checkmarked you'll get to the corresponding electronic form in order to edit items. Beside this it's possible to print a book list. This option is disponible both for librarians and users.

Illustration: Details within OPAC search mask

☛ **Note:** If more entries are checkmarked automatically a book list will be created.

Printing selection

If one or more entries are selected, the list of selected documents can be printed by all users (readers as well as librarians).

Modify Title

If only one entry is selected (i.e. ticked), confirming with OK will jump to the corresponding form sheet of this entry in order to edit it. Only the local library database can be used this way and only librarians have the right to use this action.

Copy title

If only one entry is selected (i.e. ticked), comfirming with OK will open a copy of the corresponding entry. This option supports usage of already recorded titles from other locations and can only be used by librarians.

To deselect your previously made selection, click the "Remove selection".

Additionally OPAC can pre-sort the result set by ISBN, thus avoiding showing titles from different locations multiple times. To activate this option, simply tick the corresponding selection box.

8.6 Creating book lists within OPAC

Within the OPAC it is possible to create book lists for one or more entries. Book lists can be attached to a written order and sent out by electronic or paper mail and, of course, they can be printed for easy inspection.

To create a book list, first mark, with a single mouse-click, one selected entry. Then click on the button “OK”.

To create a book list instead, that contains more than one entry, first mark with one mouse click all those entries that should be listed. Then click on the button “OK”.

Beside this it is also possible to create a so called “continuous book list”, that contains all entries.

For this, click on the button "Select all hits". All entries are marked simultaneously. Confirm by clicking “OK”. You’ll get the following view:

Illustration: Book list

Every book list provides you with all bibliographical references to each entry. Enter a name for the book list and save it in order to send it by e-mail or to print the list.

Book lists not only show the number of position but also contain references to the different locations as well information regarding to the author(s). The lists contain the abbreviation "NN" in case of lacking authors.

To get an overview of all book lists created, change to the view **11.**

Other a. Book lists. To open a book list double click on it within this view.

☛ **Note**: The configuration that in case of lacking author(s) the lists should show the remark "NN" can be done within configuration document.

8.7 Displaying format

The display formats of the search results from OPAC can be separately defined for librarians and normal users. The global configuration document holds these settings in section “Title format”.

8.8 Sending book lists by e-mail

As mentioned, it is either possible to send book lists by paper mail or by electronic mail.

In order to send it by e-mail, do the following steps:

Menu -- Actions -- Forward

9 General actions

In this chapter, general actions and functions of the application GeoCom® Library shall be described.

9.1 Searching for entries without using OPAC

Besides the possibility to search for entries using the OPAC you can search within selected views.

Example: To search for loose-leaf publications or journals, first select the view "Catalogue – 11 Title and copies".

Illustration: View "Catalogue – 11 Title and copies"

To search for an entry click on the "Find" button within the SmartIcons bar. A search box pops up. Enter the word you're searching for and click on the button "Find next".

Illustration: Search box

When applying this search method you can reach every single entry within the selected view in alphabetical order, e.g. loose-leaf publications.

It is also possible to reach a search box for quick search within the selected view.

Example: Assume you have opened the view "Catalogue – 02

Catalogue by author". As you start typing the letters of the author’s name you're searching for a search box for quick search pops up. Click OK to reach the desired entry.

Illustration: Dialog Quicksearch

Right in front of each author's name there is a preceding green symbol called twistie. Click the twisties to expand the view and reach further information.

9.2 Displaying entries

There are two methods of displaying entries - in the total view and in the preview.

To display an entry in the total view, first select an entry and double-click it to open the view. Each entry holds the following information

- headline with the complete title. It contains information on: title, author(s), publisher, and place of publication, volume, and volume -no. and ISBN- /ISSN-no.

Illustration: Catalogue entry in total view

- Information regarding the collection: If the title is catalogued, the view also provides information on: serial copy numbers, status of the copy and the main location.

Illustration: Catalogue entry in total view

9.3 Displaying entries in preview

As mentioned before, you can also display entries in preview. In preview mode, a new split screen shows the selected entry in the top section of its window while detailed information on the selected catalogue entry is displayed at the bottom.

In order to show an entry in preview, first select the corresponding entry, and then click on the preview-button within the symbol bar. This will display the following view:

Illustration: Catalogue entry in preview

Click the preview button again to close the preview. The catalogue entry contains detailed information on: title, author(s), publisher, and place of publication, volume, volume -no. and ISBN-/ ISSN-no. as well as serial copy numbers, status of the copy and the main location.

9.4 Display copies without appendant titles

To display copies without appendant titles switch to the view "Catalogue – 11 Title and copies".

Select from the menu bar:

Actions -- Admin -- Database: Check data integrity

9.5 Editing entries

Catalogue entries can be modified at any time. In order to edit an entry, first select the corresponding view, e.g. "Catalogue – 01 Catalobue by title".

Enter, as described, the first letters of the entry (e.g. the copy's name) you want to edit. A search box pops up.

Illustration: Search box for quick search

Confirm with OK.

Click the button "Catalogue – Edit document" to open the selected entry in an editable document. This is necessary to add information. To do so, first checkmark the document within the view and click on the button.

The selected document will transferred into the editable status, in order to modify the entry or add information to it.

When you have finished editing the document click on the button "Save" in order to store the new version of document.

To close the document in order to return to the selected view click on the button "Close".

9.6 Closing views without saving

If no modification has been done, entries can be closed by clicking on the button "Close". You'll automatically return to the selected view.

9.7 Deleting entries

Authorized persons can delete entries from the database. To erase an entry, first select a view from which you want to delete a publication. Select the entry so that it is marked. Then press **DEL**.

The following warning sign appears

Illustration: Warning sign while deleting process

Confirm with OK and the document will be deleted from the database. To cancel the action press button NO.

9.8 Displaying selected entries in other views without cancelling the selection

Several or single entries that have been marked within a view can be displayed in a different view without having to cancel the selection.

Example: Assuming you have opened view **01. Catalogue a. by title** and selected one or more entries. You can open another view without cancelling the selection if you keep the **Ctrl.-button** pressed while you change the view (use the standard navigator). The previous selection will be maintained and displayed also within the new view.

9.9 Duplicating entries

In order to duplicate an existing copy, first select the title that you want to duplicate.

Then, checkmark it and click on the button "Catalogue – Create duplicate" within the symbol bar. This will create a duplicate of the entry. The new document is displayed within the view as a duplicate.

Only the Language-area as well as the Publisher-parts will be copied from the ISBN. However, the edition will not be copied.

The following fields will not be copied: date of publication, edition and classification.

9.10 Adopting data from existing entries

Specific information, e.g. ISBN-no., publisher, or author can be adopted form an existing document as you create a new entry.

First click on the button "Catalogue – Create duplicate" in order to open a new form sheet for recording a new entry.

Then click the icon "OPAC" in order to open the OPAC-search mask. Now find the title from which you want to copy the information (use the search functions). As soon as you have found the title, cancel with one mouse click the "print selection". From the list select the corresponding entry and confirm with OK. The data from the selected title is now adapted to the electronic form sheet ready to be used for a new entry.

For more information on the structure of the OPAC and on how to use OPAC for search also refer chapter [OPAC].

9.11 Searching and replacing field contents

To edit documents select the view "Catalogue – 01 Catalogue by title". Then follow these steps:

Actions -- Admin -- selected documents: global search and replace

The following search box pops up:

Illustration: Global search and replace

Select the field that you want to edit. Insert the term to search for within this field and enter a term you wish to replace it with.

Example: Assume you want to edit or replace the author's name. First, select the option author from the list above. Then enter the name you are searching for; If you do not know the correct spelling of the author’s name you can use a wildcard for your search (e.g. *author’s name). Finally enter the new name and confirm with OK.

9.12 Reassigning copies

In order to re-assign copies to other titles, change into the view "Catalogue – 11 Title and copies". Then search the corresponding copy that you want to re-assign and select it with one mouse-click.

Select from the menu bar:

Actions -- Admin -- Selected copies: Reassign

Now, select the title that you want to reassign the copy and confirm with OK.

9.13 Changing copy status subsequently

The copy status can be changed subsequently. For this switch to the view "Catalogue – 11 Title and copies" and checkmark the copies for those you want to change the status.

Then select from the menu bar:

Actions -- Admin: selected documents: Change status

9.14 Updating documents

In order to update selected documents, e.g. after modifying, switch to the view "Catalogue – 01 Catalogue by title" and checkmark the document you want to update.

Then select from the menu bar:

Actions -- Admin: selected documents: Update

9.15 Changing authors and corporate bodies in title documents

To change authors and corporate bodies in title documents, first switch to the view “Catalogue – 02 Catalogue by author” and checkmark the documents you want to change.

Now, switch to the view “Catalogue – 11 Title and copies” while the Ctrl key is pressed.

☛ **Note:** The selection will only be maintained in a new view while the Ctrl key is pressed.

Then select from the menu bar:

Actions -- Admin: selected documents: Search and replace field contents

Illustration: Dialog Search and replace field contents

First, select the field you want to change “Author” or “Corporate body”, enter a new name and select from the list the specific options.

If you have selected the option “Confirm changing for each entry”, then for each selected entry you have to confirm the changing.

Illustration: Dialog box to change field contents

Confirm with “Yes”, if the changing should be realised. If not, click on “No”. In order to cancel the process, click on “Cancel”.

If the option “Confirm changing for each entry” is **not** selected the number of titles to be considered for changing will be computed.

Illustration: Dialog box for search and replace field contents

Confirm with Yes in order to change the status for all selected documents without previous consultation. However, should the status not be changed, click No. The process will be cancelled.

9.16 Remove employee from circulation list

To remove an employee from a circulation use the following action:

Actions – Admin – Selected documents: Search and replace fields

Replace the employees name with "" (an empty string).

9.17 Deadline monitoring

Aside to monitoring returning dates of trial orders, serials and orders can also be monitored.

The action is performed upon each start of the database or via the button "Copy data – Deadline monitoring".

The result is shown in a list:

Illustration: Dialog Deadlines detected

Upon using the button to perform the action you can automatically jump to the view for deadline monitoring by clicking OK. If you cancel the dialog, you will stay in your current view.

9.18 Printing

To print copy data as book cards, book lists or signature stickers, first switch to view "Catalogue – 11 Title and copies".

Then expand the view with the "Expand all" button.

Illustration: Expanded view Title and Copies

Select one or more entries, e.g. title entries.

Then use the button "Prepare printing" to open the following dialog:

Illustration: Dialog Prepare printing

The dialog offers several options. First select a print form. By default, "Book list" is preselected. Other options are "Book card" or "Signature".

Then specify a sort order for the list. You can sort the list by author, category, title or year.

The field "Print from position" lets you specify from which position printing signature signs should be started.

Furthermore, you can decide whether or not to print copy data (via the corresponding checkbox). Another checkbox lets you specify whether multiple copies should be considered only once within the list or each selected copy should be printed separately.

Finally, you can also determine the font style in which to print.

Confirm your selection with OK.

Illustration: Book list

The book list will be created automatically but can be edited manually after creation.

Via the button "Save" you can save the book list into view "Administration – 04 Book lists – a. documents".

, Then you can use the button "Print" to send the book list data to the local printer, or you can "Forward" the book list via e-mail.

10 Personal configuration

The user interface can be configured according to individual needs. To call up the configuration document select from the menu bar:

Actions -- Personal Configuration

The following form appears:

Illustration: Personal configuration document

User interface

This option lets you switch between the English and the German interface language.

Path of VLB CD-ROM

Here you can enter the path specification for data adoption from the VLB CD-ROM.

Key selection

By this option you determine, whether "only own location" key words should be used by the application. The other options include: "all locations" (use keywords from own and all other locations) and "ask always".

Background color

Select the desired background color for all forms from the list.

Tickler: Days in advance

By this option you decide, how many days in advance tickler entries should be shown.

Deadline monitoring automatically

If this checkbox is acticated, upon application start a check for deadlines will be performed and if need arises a warning dialog will be issued.

Button Save & close

This option lets you specify whether the actions "Save" and "Close" should be shown as two separate buttons.

If the checkbox is activated, these two will be replaced by one single button "Save & close". This only applies to main documents.

Print circulation slips

If you select "Standard" here, upon printing circulation slips a standard format will be used. "Select before printing" opens a selection box each time you print circulation slips.

11 Data import

Data can be adopted in many ways to the library management system GeoCom® Library. Usually, data will be imported automatically either by using the OPAC or the RAK or MAB formats. These two processes are described below.

11.1 Data import using OPAC

Data can be imported from other locations by using OPAC.

In order to import a copy's data to the own stock, first select a view, e.g. "Catalogue – 01 Catalogue by title". Then click on the button "Catalogue – New entry". You'll get the electronic form sheet for recording a new entry.

Click on the button"OPAC". You'll get the OPAC search box. Now, fill in the fields, e.g. the author's name etc. and select from the pull-down menu within the field "Database selection" the location from which you wish to transfer the data to your own stock. Finally, confirm with OK.

If the entry (author) you're searching for is found, you can adopt the data to the previously opened form sheet by confirming with OK. All fields will be adapted to the new form. Finally save this new entry.

11.2 Data import using clipboard (for entries MAB)

Data can be can also be imported from other databases (universities etc.) via Internet to the own library stock.

To do so, first select any view, than click on the button "Catalogue – New entry" in order to get a new electronic form sheet.

Then, mark the number of categories (this can be done using the mouse-button).

Take the marked area into the clipboard (keyboard shortcut "Ctrl. & C" or select from menu: Edit – Copy) and switch back to the previously opened new form sheet.

Click on the button "Paste from clipboard".

A dialog opens, where you can select the format of the data within the clipboard (e.g. MAB, RAK etc.)

Illustration: Dialog Select import format

The text (MAB) within the clipboard will be put into to different fields of the form sheet.

☛ **Note:** The button will only be visible, when the format for the data (MAB or RAK) is preselected within the configuration document. If this pre selection has not been done the button will be hide.

Setting for the import of data using the clipboard can be done within the configuration document, "data import from clipboard".

11.3 Data import using VLB CD-ROM

Data corresponding to titles and publishers can also be imported automatically from VLB-CD-ROM using the standard MAB.

To do so, first select from the menu bar:

Create -- B1 VLB OPAC

The following dialogue box is displayed:

Illustration: Dialog VLB OPAC

First, select the source from which you want to import the data (e.g. from VLB). Then enter a search term, e.g. an author's name.

To start the search click on the button "Start".

All entries found will be listed. Now, select if all data (checkmark all options) or only some titles or all titles from an author should be imported. In order to select only specific titles checkmark only these entries you want to import by clicking on it. The selected entries appear checkmarked. Additionally it is possible to fix if the publishers' addresses and other information regarding these publications should also be imported.

Click finally on the button “Start Import”.

If additional information also was imported, this will be stored within the publishers' database.

The import of data also can be done by cut and paste. The configuration can be fixed within the configuration document and is for MAB.

12 Auxiliary data bases

The application GeoCom® Library does not only consist of the Main Database (which has already been explained in detail), but also of several additional auxiliary data bases, which shall be explained in the following.

12.1 Classification database

The classification database (systematic database) of GeoCom® Library contains a proposal list for new catalogue entries.

12.1.1 Opening the database

To open the database double click the symbol “BZK”.

The following view is now displayed:

Illustration: Classification database

Similar to the main database you can access the views (displayed in the right window) by using the standard navigator.

Those entries preceded by a green twistee symbol are condensed and will yield more options when you click the symbol with your mouse.

In order to show enlarged views as a complete overview click on the "Expand all" button within the SmartIcons bar. To open selected entries double click them.

To visualise a selected entry in preview click on the preview button within the SmartIcon bar. The key checkmarked within the view will be indicated in the window beneath, also showing synonyms as well as the location where it's usable.

Illustration: Classification database in preview

☛ **Note**: In order to update the index of locations, change to the view "Catalogue – 11 Title and copies" and select from menu:

Actions -- Admin -- Database: update index location

12.1.2 Recording new key word

To open a form sheet for recording a new key word follow these steps:

Menu -- Create -- Key

You'll get the following form sheet:

Illustration: Form sheet for recording key words

As indicated, not only a keyword can be stored, but also synonyms. Therefore first insert the key word and then a synonym. Finally specify within the field "Usable at location" at which location the key word should be used, and save the document.

12.1.3 Editing entries

Authorized persons can modify keys within the database at any time.

In order to edit an entry, first checkmark the corresponding key and double click on it. The entry changes it's status and can be edited. After modifying the entry save it again.

12.1.4 Updating list of key words

In order to update the list of key words, first change into the main database and call up the view "Catalogue – 11 Title and copies". Then execute these steps:

Menu -- Actions -- Admin -- Database: Update keys

12.1.5 Replacing key words

Keywords can be replaced with other terms. To do so, first switch to GeoCom® Library's main database.

Then execute these steps:

Menu -- Actions -- Admin -- Database: Replace keys

The following dialogue is displayed:

Illustration: Dialogue box "Global search and replace"

First select the field from the list to modify with one mouse click. Then enter a term into the field "Search for" and enter into the field "and replace with" the term that should replace the first term. Confirm with OK.

12.1.6 Maintenance of subject headings

The databse BZK (bzk.nsf) contains the index list for key words. Key word that are no more necessarily can be deleted. Already issued key word in title documents are not affected by this procedure.

In order to erase an entry from the list, switch to the view "Catalogue – 04 Catalogue by subject headings" and checkmark those entries you want to change.

Switch now to the view "Catalogue – 11 Title and copies“ while holding the Ctrl-key pressed.

Illustration: View "Catalogue – 11 Title and copies"

Now select from menu bar:

Actions – Admin – Selected documents:Search and replace field contents

Illustration: Dialog Global search and replace

Select “subject heading”, then enter both the old and the new key word.

☛ **Note:** To erase a subject heading enter quotation marks (“").

If you have selected the option “Confirm changing for each entry”, then for each selected entry you have to confirm the changing.

Illustration: Dialog to change field contents

Confirm with “Yes”, if the changing should be realised. If not, click on “No”. In order to cancel the process, click on “Cancel”.

If the option “Confirm changing for each entry” is **not** selected the number of titles to be considered for changing will be computed.

Illustration: Dialog for search and replace field contents

12.2 Publishers database

The library management system GeoCom® Library contains a publishers database that contains the complete stock of the publisher's data.

12.2.1 Opening the database

To open the database double click the symbol "BZP"

The following view is now displayed:

Illustration: Publishers database

Similar to the main database you can access the views (displayed in the right window) by using the standard navigator.

To display a selected entry in preview click on the preview button within the SmartIcon bar. The publisher checkmarked within the view, will be indicated in the window beneath, showing all information regarding to the publisher, like address and country etc.

Illustration: Selected entry in preview

Click on the entry within the standard navigator in order to close the view.

12.2.2 Recording a new publisher

To open a form sheet for recording a new publisher follow these steps:

Menu -- Create -- Publisher

You'll get the following form sheet:

Illustration: Form sheet for recording a publisher

12.2.3 Deleting publisher from the database

Authorized persons can delete entries from the database. To erase an entry, first checkmark the publisher. Then press **DEL**. Next to the entry appears the symbol of a paper basket . Now, press **F9** and confirm with OK - the document is deleted.

☛ **Note:** Entries that have been inadvertently marked for deletion can be restored. For this select from menu bar:

Edit -- Undo delete

12.3 Suppliers database

Another database that the library management system GeoCom® Library contains is a suppliers database.

12.3.1 Opening the database

To open the database double click the symbol "BZS"

The following view is now displayed:

Illustration: Main view suppliers

To display a selected entry in preview click on the preview button within the SmartIcon bar. Similar to the publisher database in this database the supplier checkmarked within the view, will be indicated in the window beneath, showing all information regarding to the supplier, like address and country etc.

12.3.2 Recording a new supplier

To open a form sheet for recording a new publisher follow these steps:

Click the button "New supplier" to open a form sheet, where you can enter all relevant data. Save and close your document. Once a supplier has been added to the suppliers data base, it can be used from within the main data base.

☛ **Note:** Publisher's and Supplier's documents can also be generated while recording a new title!

12.3.3 Deleting a supplier form the database

Authorized persons can delete entries from the database. To erase an entry, first checkmark the publisher. Then press **DEL**. Next to the entry appears the symbol of a paper basket . Now, press **F9** and confirm with OK - the document will be deleted.

☛ **Note:** Entries inadvertently marked for deletion can be restored. For this select from menu bar:

Edit -- Undo delete

12.4 Classification database (systematic database)

GeoCom® Library has also a classification database (systematic database) that contains the complete stock of all classifications ans categories. In that database all terms (classifications) that are necessary for the recording process of new titles are administered.

12.4.1 Opening the database

To open the database double click the symbol “BZY”

The following view is now displayed:

Illustration: Main view “Categories”

To display a selected entry in preview click on the preview button within the SmartIcon bar. Similar to the publisher and supplier database in this database the category checkmarked within the view, will be indicated in the window beneath, showing all information regarding the category, like the abbreviations of the 1. and 2. level in english and german language.

12.4.2 Recording a new category

To record a new entry click on the button "New entry" within the symbol bar. You'll get the following form sheet:

Illustration: Form sheet for recording a new category

To save a new category click on the button "Save" within the symbol bar.

12.4.3 Deleting a category from the database

Authorized persons can delete entries from the database. To erase an entry, first checkmark the publisher. Then press **DEL**. Next to the entry appears the symbol of a paper basket . Now, press **F9** and confirm with OK - the document will be deleted.

☛ **Note:** Entries that are marked for deletion can be restored. For this select from menu bar:

Edit -- Undo delete

12.5 Data Repository

The database “Data Repository" contains a listing of all countries conforming to ISO 3166. When a new publisher is recorded the country of origin can be adopted from this database into the document.

13 Appendix A Symbols used within views

Within the different views symbols are displayed. These symbols serve for improved optical orientation and are therefore explained here.

Symbols displayed in views of main database:

01. Catalogue a. by title

displayed symbol	meaning
	title: loose-leaf
	title: articles / jubilee publication
	title: cataloguing journal with volume
	title: cataloguing journal without volume
	title: series

02. Multi volume monographs

displayed symbols	meaning
	title: catalogue entry not administrated yet
	title: part of a multivolume monograph

05. Journals

displayed symbol	meaning
	title: catalogue entry journal with volume
	copy: journal; catalogued

07. Title and Copies

displayed symbols	meaning
	title: publication
	copy: copy of publication

08. Other e. Templates

displayed symbols	meaning
	outgoing correspondence / order template with status "open"
	outgoing correspondence / order template with status “complete“
	outgoing correspondence / order template with status “marked“

Other symbols within the electronic form sheets:

Electronic form sheet:

displayed symbols	meaning
	edition type: single volume monograph (specification: book; loose-leaf; other)

	edition type: multivolume monograph (specification: book, Loose-leaf; other)
	edition type: journal
	edition type: single- / multivolume monograph (specification: article / jubilee publication)

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