OCLC Amlib
Library Management System

Authorities Manual

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OVERVIEW

This course is designed for *Amlib* users who would like to more about the *Authorities* module and how it relates to the *Catalogue* module, *NetOpacs* and other modules.

The following aspects will be discussed:

- Purposes of Authority Control
- Using Authority Headings in Catalogue
- The *Authorities* application – searching, modifying, *See*, *See Also*, *Seen By* cross-references
- Marc Tags
- Authority Maintenance including Replace, Merge, Refresh
- Authority Import
- Reporting new Authorities

Authority control means to follow a recognised or established form. For example: Subject Headings should match an existing heading or be created following rules for construction. Authority control has several purposes:

1. **Consistency**: Ensures that terms entered match an existing heading, otherwise a new heading is created. Therefore searching is easier as there is unlikely to be variations. For example: **J.K. Rowling**, **Joanne K. Rowling**, **Joanne Rowling**, etc.
2. **Cross References**: Patrons are guided to alternative headings. The ability to put see and see also references is useful for library administrators. For example: **Roller Blading**, *see* **Inline Skating**. Therefore, it enhances search possibilities. Nothing found when searching **Shares** or **Stock Market** (*preferred terms* are **Stocks** and **Stock Exchange**). Nothing found when searching **Renovations** (*preferred term* is **Interior Decoration**). **Tidal Waves** found 6 entries, **Tsunamis** found more than 30. Should have **Tidal Waves** *see also* **Tsunamis** to link the two headings.
3. **Speed of Entry**: Authorised headings can be selected from a list, which eliminates manual entering of data

Local Authority Control within Amlib

There are 3 levels of Authorities: *Shared Authorities*, *Non-Shared Authorities* and *Non-Authorities*.

Shared Authorities (Non Unique)

- For example: *Authors*, *Series* and *Subjects*

The Tag is not considered to be unique to a catalogue and is linked as an Authority used in *many* catalogue records. For example: a **Subject** (Tag **650**) is usually shared by many catalogue records.

It is possible for a title to be considered not unique and for all catalogues with the same title to be linked even if they are in fact different books. This can be configured according the preference of the individual site.

Non-Shared Authorities (Unique)

- For example: *ISBN* and *Titles* (usually)

The Tag is considered to be unique to a catalogue. For example: an **ISBN** (Tag **020**) is usually unique to each catalogue.

A Title Statement (Tag: 245) can be considered unique. A new authority will be created for every new title regardless of duplication. Maintaining the **245 | Title** as an Authority simply ensures consistency. Otherwise it can be setup as a non-Authority.

Non-Authorities

- For example: *Extent* and *Notes*

The Tag is not an Authority and consistency is not maintained.

MARC TAGS

MARC (**MA**chine **R**eadable **C**atalogue) is a standard for storing bibliographic records, in a particular format that can be read, retrieved and manipulated by a computer. This standard means that catalogue data may be exchanged between Libraries and/or Cataloguing agencies.

Although most libraries receive data rather than distribute it, *Amlib* stores Catalogue data in Tag and Subfield format. A MARC entry can easily be recreated and also replicates data in order to create enquiry indexes and keywords.

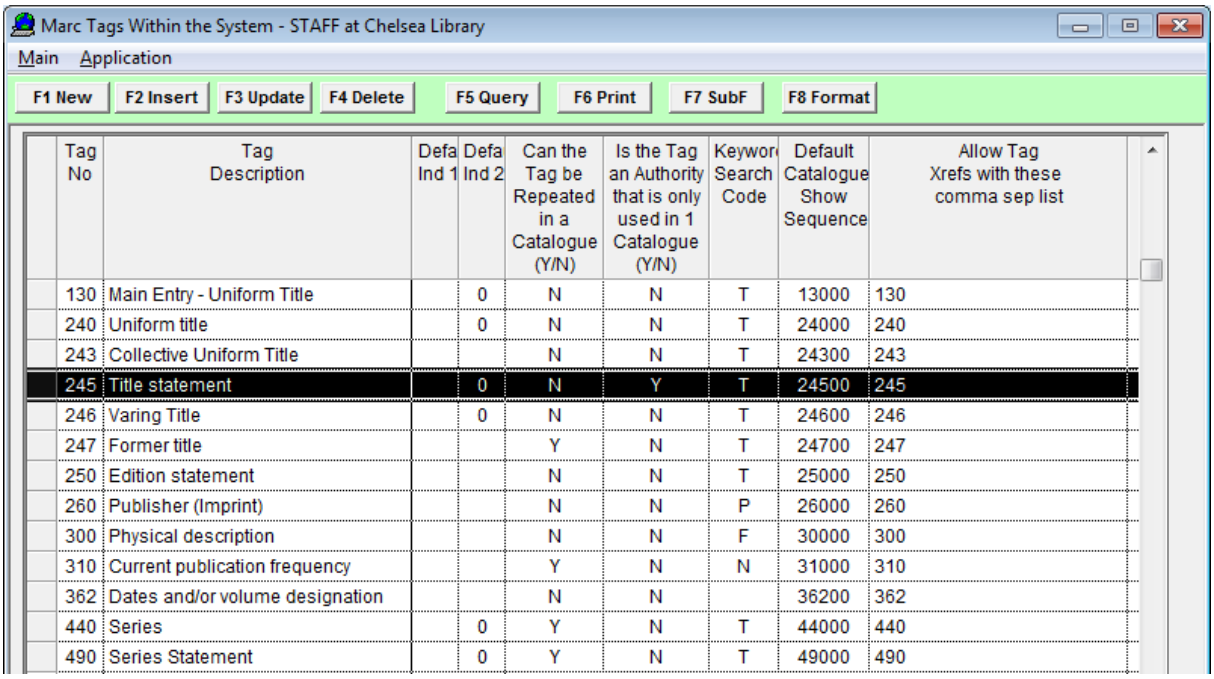
The Marc Tag definitions that you maintain in this application control the following

- which Tags are to be held on the system
- which Subfields of these Tags are to be kept
- which Subfields are used to build enquiry indexes
- which Subfields are used to build enquiry keywords
- which Subfields are used in the Authority file
- which Subfields are used in the Catalogue file

WARNING: All of these parameters have a vital role within the system and must only be changed after careful consideration of the possible consequences.

To access the Marc Tag definitions:

1. Launch the *Amlib* client
2. Go to **Main** > **Authorities** > **MarcTags** – the Marc Tags Within the System screen will display:



Tag No	Tag Description	Defa Ind 1	Defa Ind 2	Can the Tag be Repeated in a Catalogue (Y/N)	Is the Tag an Authority that is only used in 1 Catalogue (Y/N)	Keywor Search Code	Default Catalogue Show Sequence	Allow Tag Xrefs with these comma sep list
130	Main Entry - Uniform Title		0	N	N	T	13000	130
240	Uniform title		0	N	N	T	24000	240
243	Collective Uniform Title			N	N	T	24300	243
245	Title statement		0	N	Y	T	24500	245
246	Varing Title		0	N	N	T	24600	246
247	Former title			Y	N	T	24700	247
250	Edition statement			N	N	T	25000	250
260	Publisher (Imprint)			N	N	P	26000	260
300	Physical description			N	N	F	30000	300
310	Current publication frequency			Y	N	N	31000	310
362	Dates and/or volume designation			N	N		36200	362
440	Series		0	Y	N	T	44000	440
490	Series Statement		0	Y	N	T	49000	490

All Tags that you wish to use within the system must be defined here. Associated with each Tag is Subfield **[F7 SubF]** and format (punctuation) **[F8 Format]**.

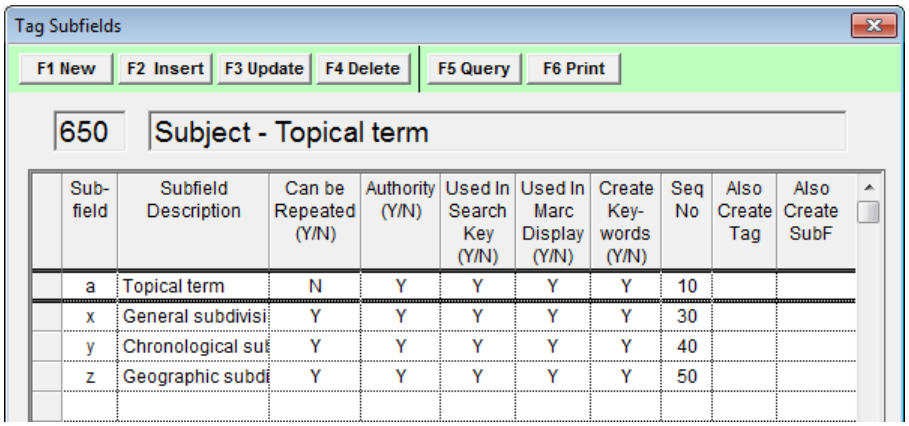
COLUMN NAME	DESCRIPTION / EXAMPLES	
Tag No	The Tag number as it relates to the USMARC format – for example: **245** is always **Title Statement**	
Tag Description	A description that can be entered to describe the Tag No in the first column	
Can the Tag be Repeated in a Catalogue? (Y/N)	**Yes**	**Repeatable** Tags: A catalogue entry **can** have certain Tags that can be repeated – for example: **700 | Additional Authors** Tag and the **650s | Subjects** Tags
	No	**Non-repeatable** Tags: Some Tags **cannot** be repeated in the same catalogue entry – for example: **100 | Main Entry – Personal Name (Author)** Tag or **245 | Title Statement** Tag
Default Ind(icator) 1 and 2	Indicators are used by the system to "treat" text or categorise a Tag. It is possible to set up default indicators for some Tags. • See: Appendix 4: US MARC for more information on indicators	
Is the Tag an Authority that is only used in 1 Catalogue? (Y/N)	**Yes**	The Tag is considered to be unique to a catalogue – for example: a **020 | ISBN** Tag is usually unique to each catalogue record. **A title can be considered *unique*. A new Authority will be created for every new title regardless of duplication**.
	No	The Tag is not considered to be unique to a catalogue and is linked as an Authority used in many catalogues – for example: a **650 | Subject** Tag is usually shared by many catalogues. **A title can be considered *not unique* and all catalogues with the same title will be linked even if they are in fact different books. This can be configured according the preference of the individual site.**
Keyword Search Code	Keyword search identifiers can be created to use with Tags for search purposes. An identifier will need to be determined for each Tag. During enquiries, keyword searches are restricted to specific Tags using these identifiers. For example: **Title**-related Tags (**245**, **246** and **490**) may have a keyword identifier of '**T**'. Any **T.keyword** search would find keywords within **Title Statement**, **Series Statement** or **Varying (Added) Title**. These are also identified in any *Opac* or *NetOpac* keyword searches. The letters used in this screen refer to the Keyword Codes set in **Application**> **KeywordDesc**. **Please Note:** If keywords already exist then changing the keyword identifier will not recreate those keywords.	

Subfields

Subfields (**$**) are subdivisions of Tags. The number of Subfields will vary, but all Tags have at least one Subfield. Having defined a Tag, the Subfields to be used are specified.

To access the Subfields:

1. From the Marc Tags Within the System screen, select a Tag – for example: **650 | Subject – Topical Term**
2. Click the **F7 SubF** button – the Tag Subfields screen will display:



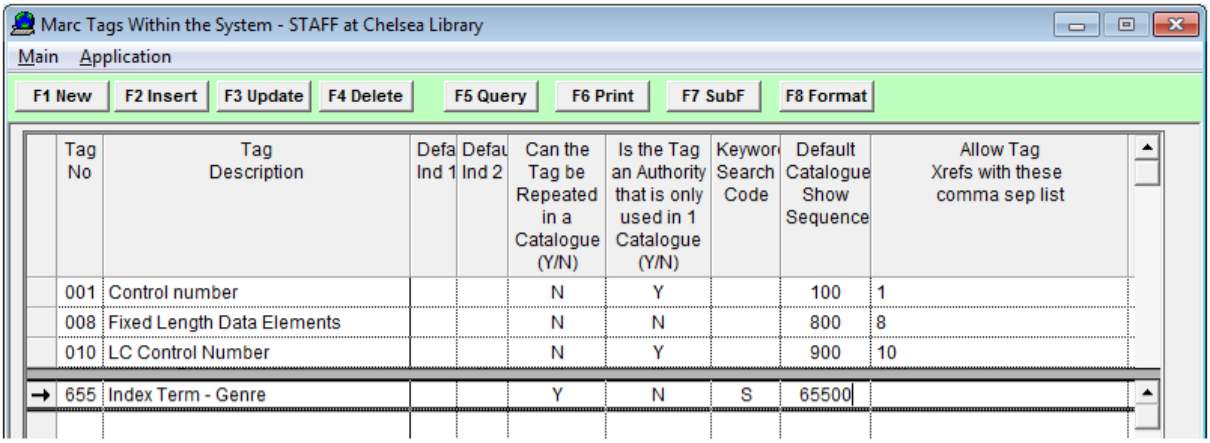
COLUMN NAME	DESCRIPTION/EXAMPLES
Subfield	Usually defined as a lower case letter. Most Tags have a Subfield of: **$a**
Subfield Description	A description that defines the Subfield so the operator can recognise its purpose
Can be Repeated (Y/N)	Is this a repeatable Subfield for this Tag? Can you have more than one Subfield of the same letter? For example: more than one **$a** Subfield for an Author
Authority (Y/N)	Is this Subfield part of the Authority? This is usually set to **Y** except in the case of certain Tags where the data is not shared with other records – for example: **500$a** (Notes) and **490$v** (Volume)
Used in Search Key (Y/N)	Some Subfields although part of the Authority are not necessarily used for searching purposes – for example: the **100 | Author – Personal Name** Tag / **d | date-of-birth** Subfield (**100$d**). These fields should have this column set to **N** (they may still have the keyword column set to **Y**). The combined Search Key fields form the Authority Key (the database key used by *Amlib* for searching purposes). The Authority Key is appears in **GREY BOLD** text in the Authority.
Used in Marc Display (Y/N)	The Catalog screen display shows those Subfields that have a **Y** in this column. Though visible the Subfield is not necessarily searchable. For example: **$d** Subfield may have **Y** in this column but **N** in the Search Key (Y/N) column:

	Carey, Peter, 1943- **Oscar and Lucinda** **Melbourne : Australian Large Print, 1989** **LP CARE**
Create Keywords (Y/N)	Although you may have specified a Keyword Descriptor against the Tag itself you must still specify which Subfields (if any) are to have keywords created
Seq No	When Tags are concatenated for display purposes then the Subfields must be shown in a specific sequence according to the MARC rules. This is defined here but may be overridden for specific Tags in Catalogue entry. When reading external files *Amlib* assumes Subfields are already in the correct order
Also Create Tag	Occasionally, a Tag needs to create an additional Tag – for example: a **700 | Additional Author** if it has a Subfield: **$t** needs to create a **740 | Additional Title** Tag. These are preset and should not need to be altered by the operator
Also Create SubF	Occasionally, a Tag needs to create additional Subfields – for example: a **700 | Additional Author** if it has a Subfield: **$t** needs to create a Subfield: **$a** for the **740 | Additional Title** Tag. These are preset and should not need to be altered by the operator

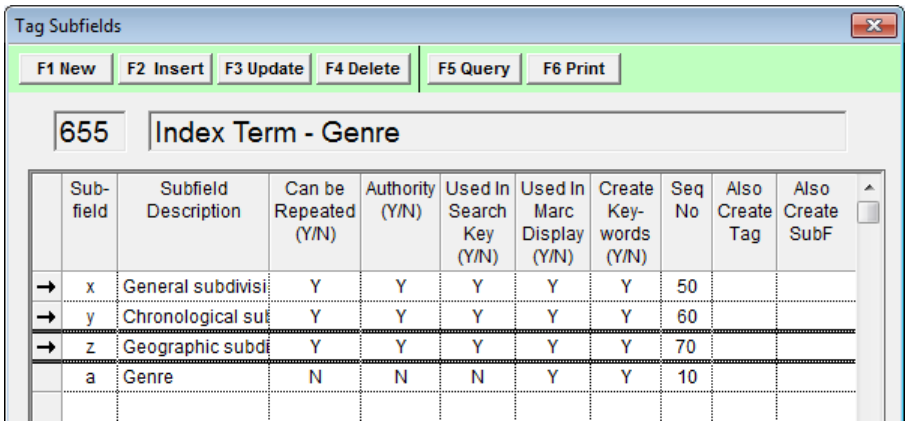
Creating a New Tag

Only those Tags defined on the system will be available for data coming from the import. For example: if a Tag: **655** is imported via *SL of WA*, this Tag will only go into *Amlib* if the Tag is defined.

1. Launch the *Amlib* client
2. Go to **Main** > **Authorities** > **MarcTags** – the Marc Tags Within the System screen will display
3. Click the **F1 New** or **F2 Insert** button – anew entry will appear in the table:



4. Type in the Tag details: Tag No, Tag Description, etc
5. Click the **F3 Save** button
6. Select the new Tag line and click the **F7 SubF** button – the Tag Subfields screen will display:

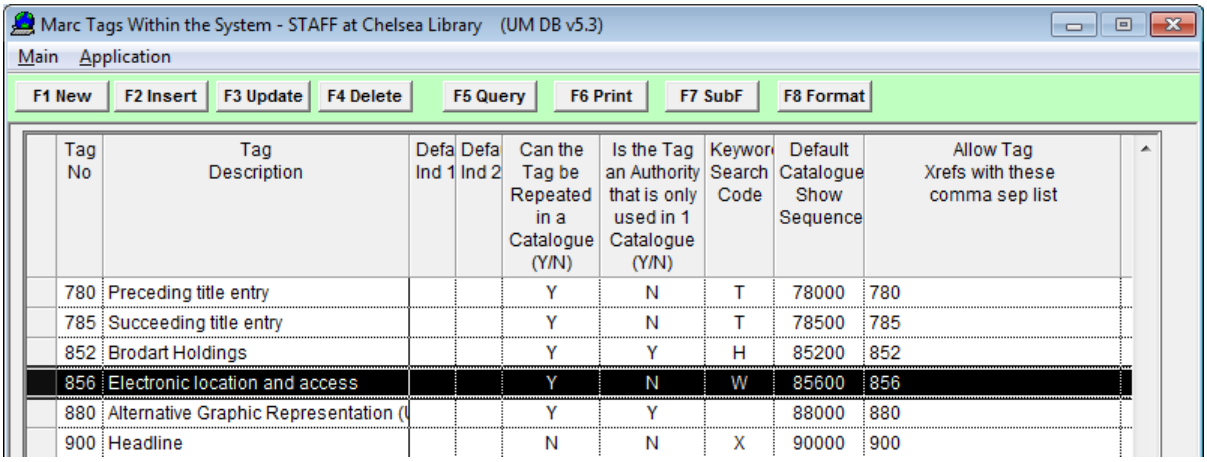


7. Fill in the table as appropriate
8. Click the **F3 Update** button when complete

URL Tags

Ensure the **856 – URL Authority** Tag has been defined, and that there is **$u** and **$z** Subfields:

1. Launch the *Amlib* client
2. Go to **Main** > **Authorities** > **MarcTags** – the Marc Tags Within the System screen will display:



3. Check to see if the **856 | Electronic location and access** Tag is in the list of Tags (it may be also be called **979 | URL Link**)
4. If it is NOT present, then you can add one as follows:
    a. Click the **F1 New** button
    b. Fill in the fields as shown in the table below

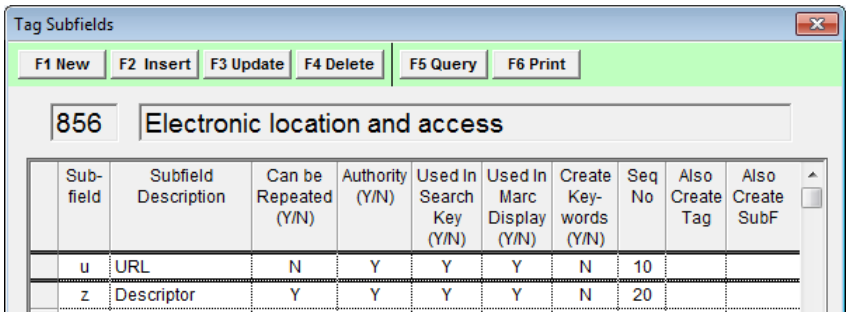
HEADING	DETAILS
Tag No	**856**
Tag Description	**Electronic location and access**
Default Ind 1	<leave blank>
Default Ind 2	<leave blank>
Can the Tag be Repeated in a Catalogue (Y/N)	**Y**
Is the Tag an Authority that is only used in 1 Catalogue (Y/N)	**N**
Keyword Search Code	<leave blank>
Default Catalogue Show Sequence	**85600**
Allow Tag Xrefs with these comma sep list	**856**

c. Click the **F3 Update** button to save the Tag definitions

5. You will also need to check/create Subfields for the **856** Tag:

a. Highlight the **856** Tag

b. Click the **F7 SubF** button- the Tag Subfields table will display:



c. Add the (**$u**) and (**$z**) Subfields as shown in the table below:

HEADING	DETAILS	
Subfield	**u**	**z**
Subfield Description	**URL**	**Descriptor**
Can be Repeated (Y/N)	**N**	**Y**
Used in Search Key (Y/N)	**Y**	**Y**
Used in Marc Display (Y/N)	**Y**	**Y**
Create Keywords	**N**	**N**
Seq No	**10**	**20**
Also Create Tag	<leave blank>	<leave blank>
Also Create SubF	<leave blank>	<leave blank>

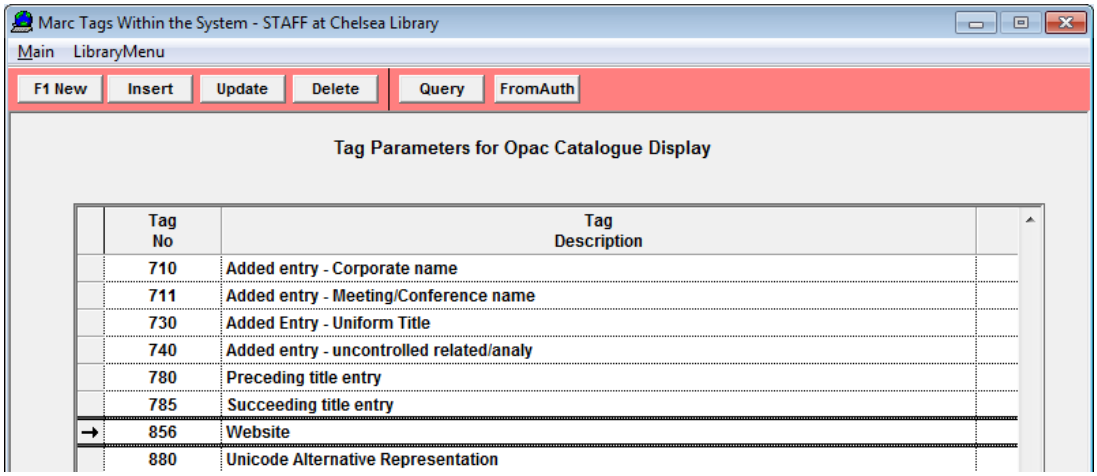
d. Click the **F3 Update** button when complete

The **856** Tag has now been configured.

Display a Marc Tag in the NetOpacs

Please Note: It is possible to add, alter the headings and selection of Marc tags that display in the Catalogue view (**MarcList.htm** screen) for the *NetOpacs* . For example, simplify the Catalogue display by limiting the Number of Marc Tags to display and make the Authority headings more meaningful.

1. Go to **Main** > **Supervisor** > **Supervisor**
2. From the menu, select **LibraryMenu** > **Opacs** > **OpacDisplayTags** – the Marc Tags Within the System screen will display



3. Click the **F1 New** or **Insert** button – a new entry will be added to the table
4. Type in the Tag No to display and the Tag Description (the latter will display in the Catalogue view on the *NetOpacs* as the heading)
5. Click the **Update** button
6. Exit and restart the *Amlib* client for these changes to take effect

Please Note: After changing settings, ensure that the *NetOpacs* are refreshed by stopping and starting the *WebConsole* on the *NetOpacs* server (traffic lights on the Taskbar or by stopping and starting the *WebConsole Service*).

Format

Formats are used to automatically place punctuation within Tags. The main use for this is for Subject Headings where a hyphen is required between the Main Heading and a Subdivision – for example: **Spain – Fiction.**

WARNING: Adding punctuation may affect the importing of records from cataloguing agencies where punctuation is taken from the imported record rather than the *Amlib* system. If punctuation is added using **F8 Format**, duplicated punctuation may result.

FORMATTING	EXPLANATION	NOTES
Standard (Yes)	Default Format to be used on most Tags. Any Tags that have split *Authority*/*Non-Authority* Subfields should use the Import/Export style of Format	If Standard formatting is set for any Tag that has a split Authority, double formatting can occur – for example: **Series Statement** (**490**) Tag – an *Authority* **Series Statement (Title)** but a *Non-Authority* **Series Number**. Semi-colons (**;**) may be doubled after the **Series name** and before the **number** during Import
Import/Export	Allows the correct formatting of mixed *Authority*/*Non-Authority* Tags.	Use for any Tag that has a split Authority – for example: **Series Statement** (**490**) Tag – an

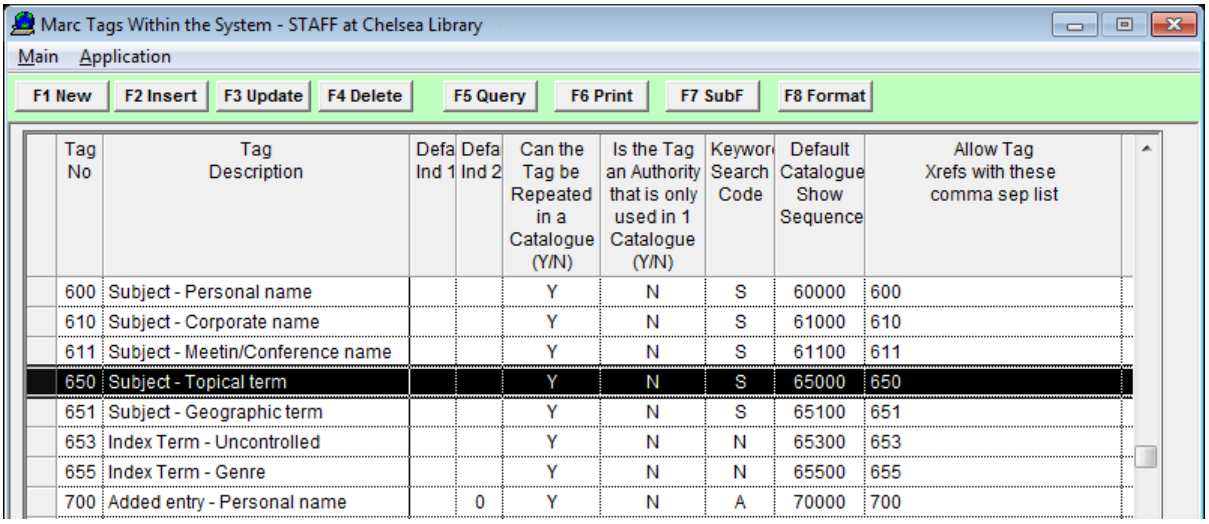
(No)	This creates the formatting for Importing and manual creation and allows the Authority to display correctly whether on its own or with the *Non-Authority* Subfield	*Authority* **Series Title** but a *Non-Authority* **Series Number**.

Standard

A Standard Subfield is a Subfield for which the formatting remains constant no matter which Subfield is before or after it.

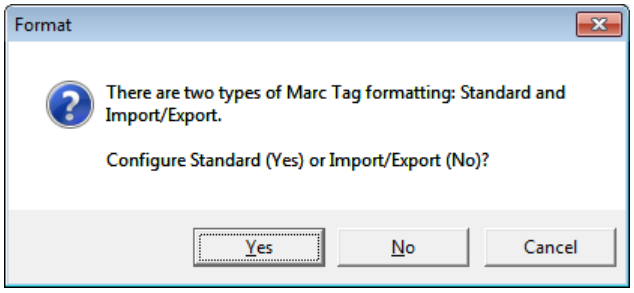
Punctuation can be set for a Tag depending on the Subfield added. For example: the most used punctuation is for Subject headings, to include a hyphen between the Main heading and subdivisions.

1. Launch the *Amlib* client
2. Go to **Main** > **Authorities** > **MarcTags** – the Marc Tags Within the System screen will display:

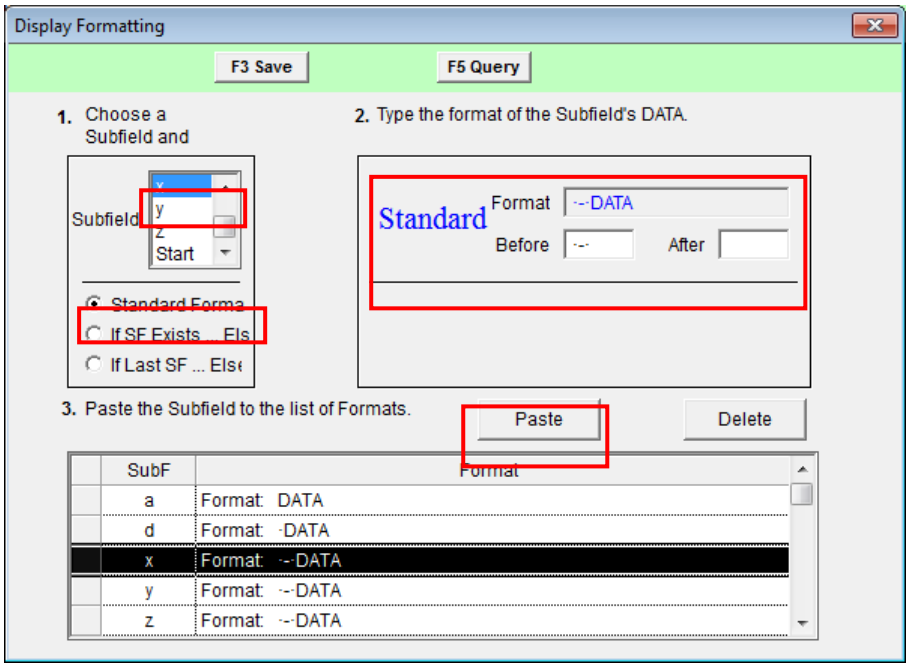


Tag No	Tag Description	Defa Ind 1	Defa Ind 2	Can the Tag be Repeated in a Catalogue (Y/N)	Is the Tag an Authority that is only used in 1 Catalogue (Y/N)	Keywor Search Code	Default Catalogue Show Sequence	Allow Tag Xrefs with these comma sep list
600	Subject - Personal name			Y	N	S	60000	600
610	Subject - Corporate name			Y	N	S	61000	610
611	Subject - Meetin/Conference name			Y	N	S	61100	611
650	Subject - Topical term			Y	N	S	65000	650
651	Subject - Geographic term			Y	N	S	65100	651
653	Index Term - Uncontrolled			Y	N	N	65300	653
655	Index Term - Genre			Y	N	N	65500	655
700	Added entry - Personal name		0	Y	N	A	70000	700

3. Select a Tag to Format (for example: **650 | Topical Term**), and click the **F8 Format** button – a prompt will display with the following message: **There are two types of Marc Tag formatting: Standard and Import/Export.**
   Configure Standard (Yes) or Import/Export (No)



4. Click the **Yes** button to choose the *Standard* format – the Display Formatting screen will display:

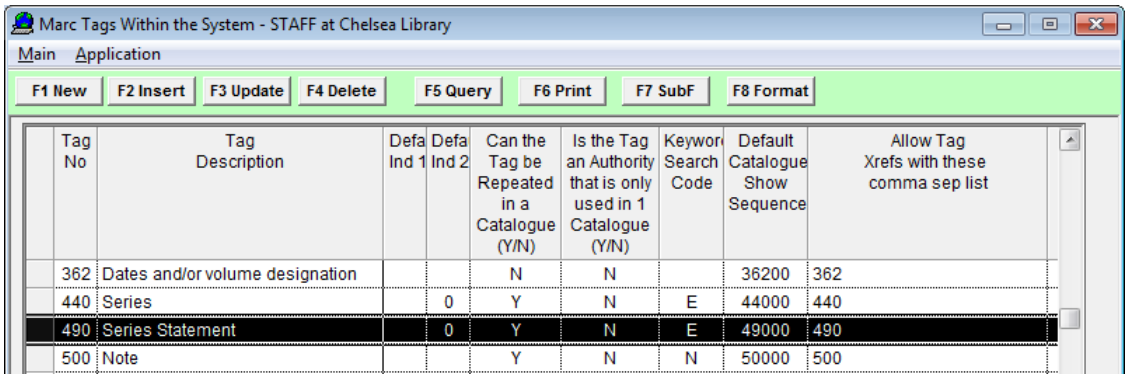


5. In box 1. Choose a Subfield and
    a. Select the Subfield letter (**a** – **z**) or **End** – in this example, we have selected: **x**
    b. Select **Standard Format** from the list of options underneath
6. In box 2. Type the format of the Subfield's DATA
    a. Type all the characters that define the Subfield's format in the Before and After fields
    b. How the Punctuation will display in relation to the **DATA** can be seen in the Format field, depending on the entry in the Before or After fields
7. Once the Format is correct, click the **Paste** button – the formatted Subfield will be added to the table at the bottom of the screen
8. Repeat for any other Subfields
9. Click the **F3 Save** button when complete

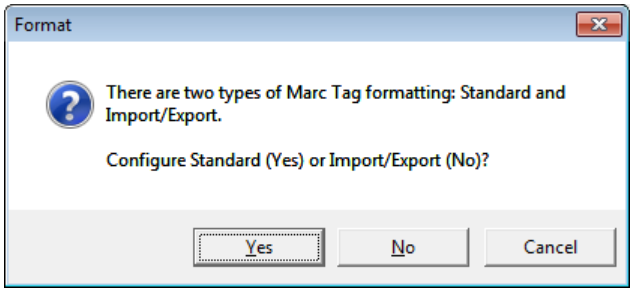
Import/Export

Use for any Tag that has a ***split*** Authority, otherwise double-formatting can occur – for example: **Series Statement** (**490**) Tag – has an *Authority* **Series Statement (Title)** but a *Non-Authority* **Volume Number**.

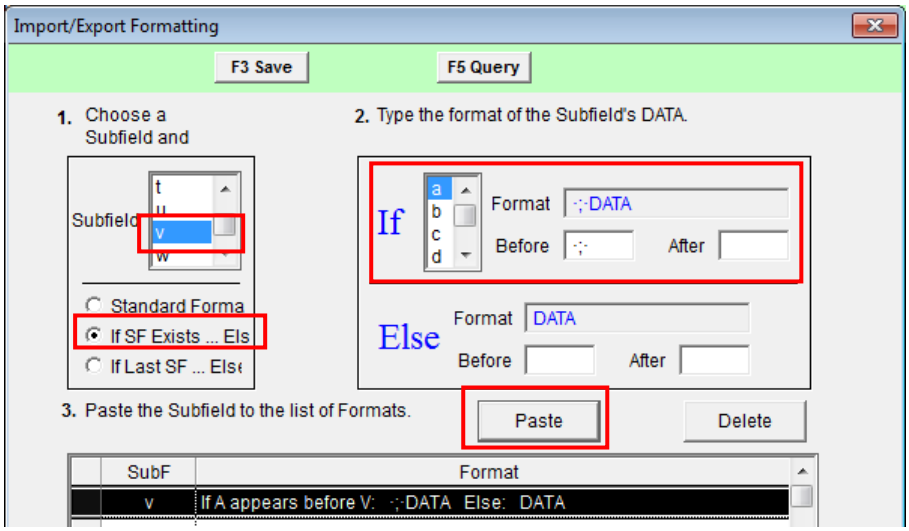
1. Launch the *Amlib* client
2. Go to **Main** > **Authorities** > **MarcTags** – the Marc Tags Within the System screen will display:



1. Select a Tag to Format (for example: **490 | Series Statement**), and click the **F8 Format** button – a prompt will display with the following message: **There are two types of Marc Tag formatting: Standard and Import/Export.**
Configure Standard (Yes) or Import/Export (No)



3. Click the **No** button to choose the *Import/Export* format – the Import/Export Formatting screen will display:



4. In box 1. Choose a Subfield and

   a. Select the Subfield letter (**a** – **z**) or **End** – in this example, we have selected: **v** (for **Volume Number**)

   b. Select **If SF Exists ... Else** from the list of options underneath (this will allow us to control when the formatting appears)

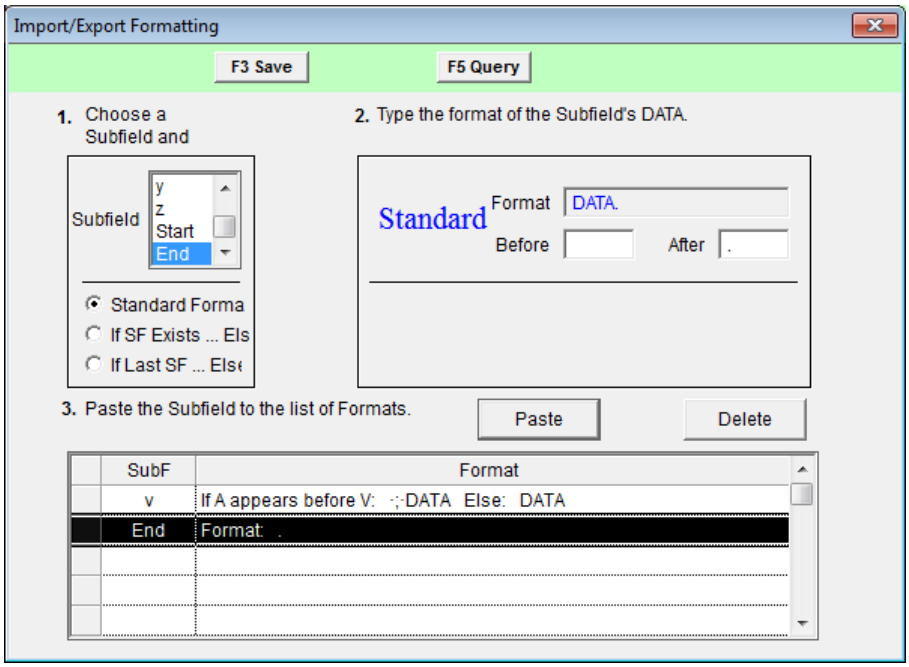
5. In box 2. Type the format of the Subfield's DATA

   a. Select the Subfield letter (**a** – **z**) from the If box – in this example, we have selected: **a**

b. Type all the characters that define the Subfield's format in the Before and After fields – in this example, we have typed: **<SPACE> ; <SPACE>**

c. How the Punctuation will display in relation to the **DATA** can be seen in the Format field

6. Once the Format is correct, click the **Paste** button – the formatted Subfield will be added to the table at the bottom of the screen
7. Repeat for any other Subfields
8. If a full stop is to be used at the end of the heading:
   a. In box **1**, select **End**
   b. Select **Standard** format
   c. Enter a full stop (**.**) in the After field
   d. Click the **Paste** button



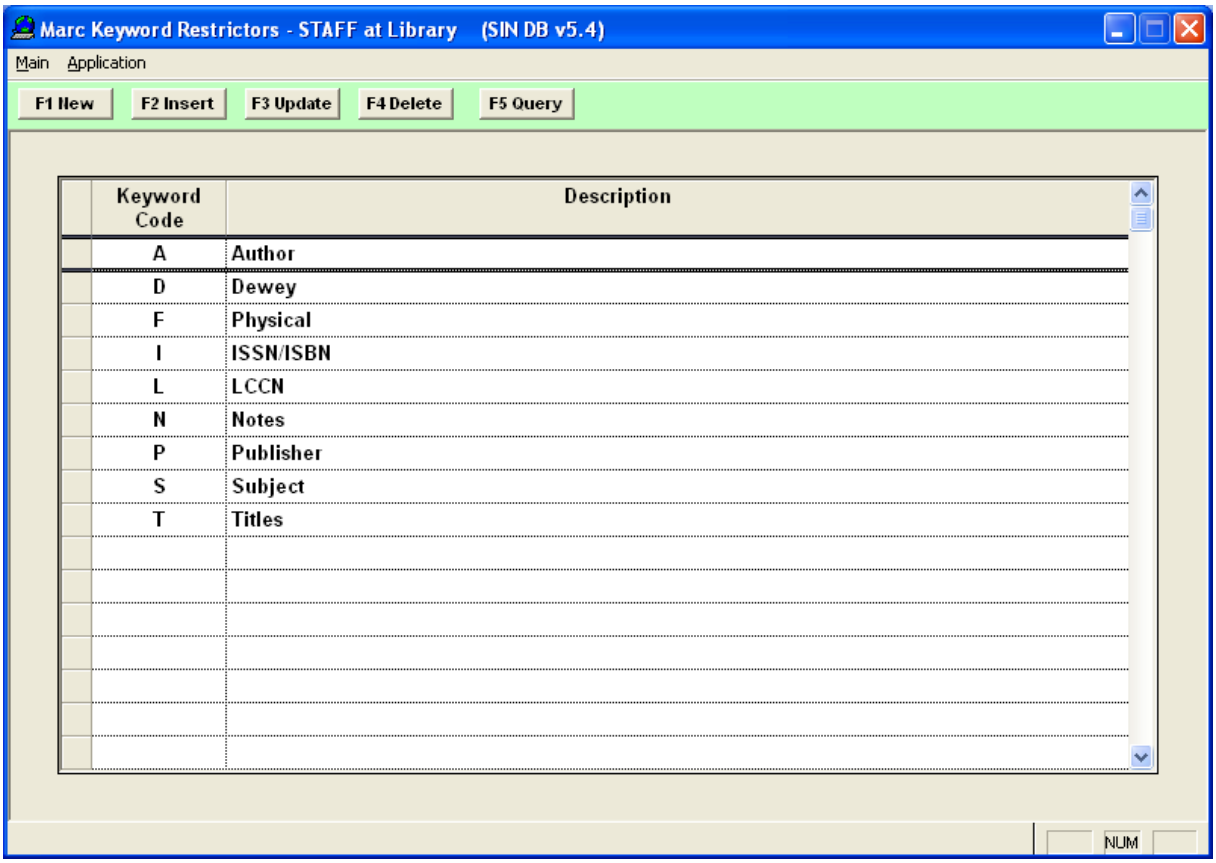
9. Click the **F3 Save** button when complete

Keyword Restrictors

Amlib uses a set of Keyword Codes which are assigned to particular MARC Tags for searching purposes.

To view/modify your existing Keyword Codes:

1. Launch the *Amlib* client
2. Open the *Authorities* module, and select **Application** > **KeywordDesc** – the Marc Keyword Descriptors screen will display:



3. You will see a series of Keyword Codes with Descriptions assigned. By creating and assigning these codes to particular MARC Tags and NetOpac search pages, you can control what MARC Tags are targeted during a search

For example: In the above screenshot, you will note that **Series Titles** and **Titles** have separate Keyword Codes. This allows us to create *NetOpac* search pages where a **Series Title** can be searched separately.

To insert a new Keyword Code:

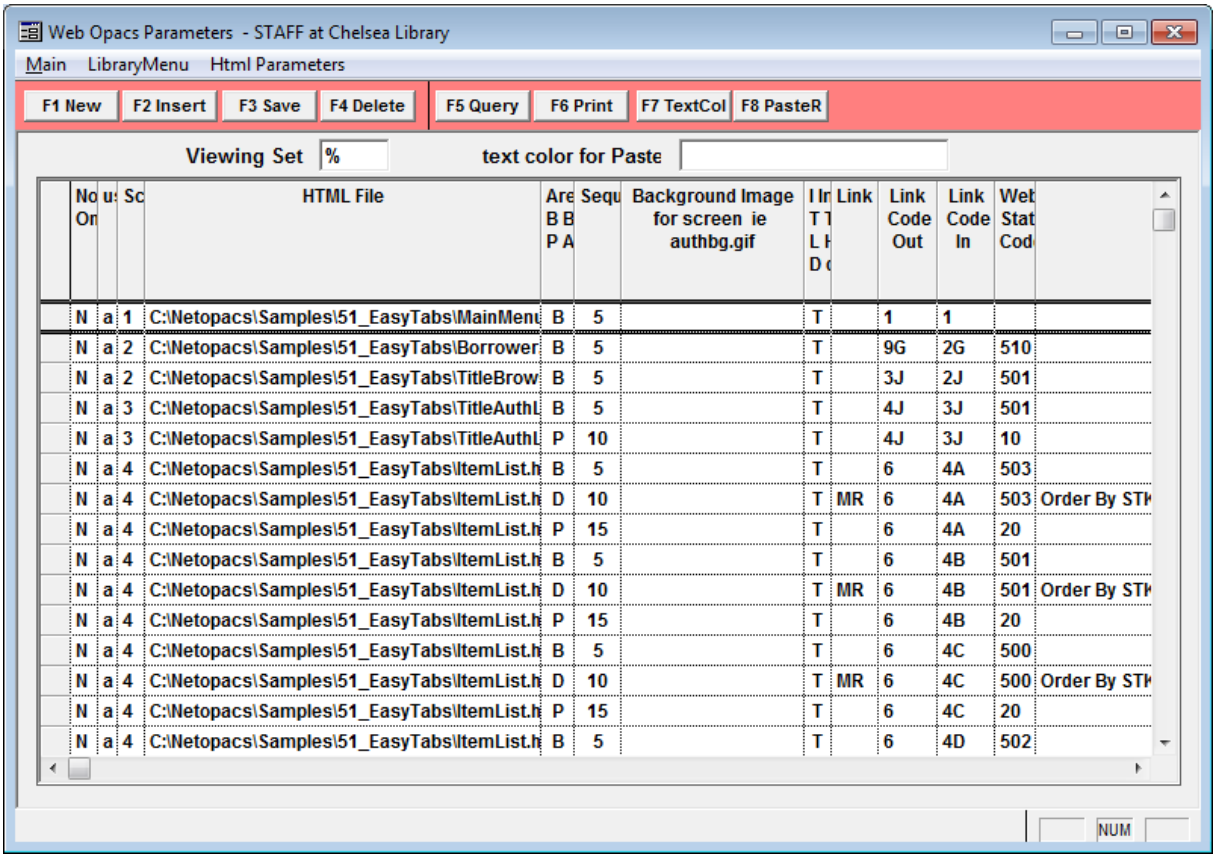
1. Click the **F1 New** button or **F2 Insert** button
2. Type in a *single-letter* Keyword Code – for example: **E**
3. Type in a Description – for example: **Series Title**
4. Click the **F3 Update** button to save

NetOpac Search Screens Search Codes

Once a Search Code has been assigned to a MARC Tag, it can be then be used by the *NetOpac*s search pages to target specific MARC Tags via the allocated Search Code.

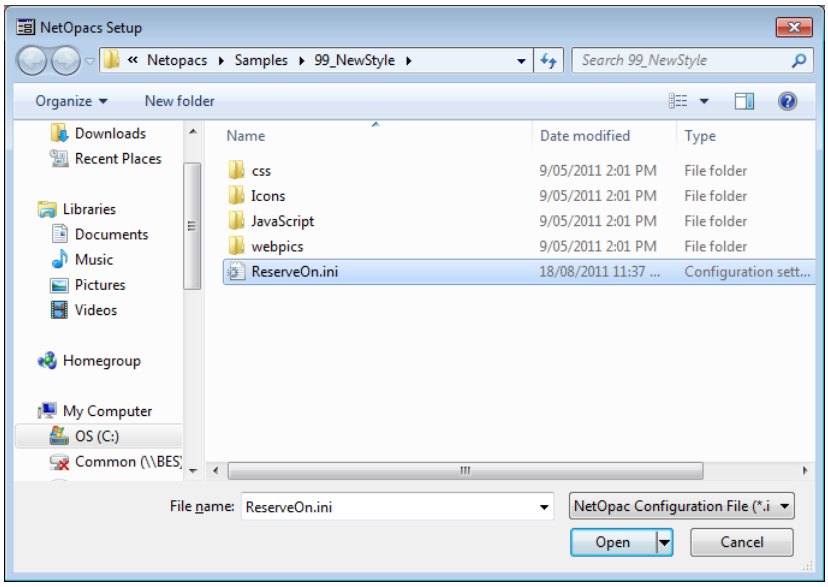
Please Note: You must be able to access the *NetOpacs* server as a network location if accessing the *NetOpacs* pages remotely.

1. Launch the *Amlib* client
2. Go to **Main** > **Supervisor** > **WebParams** – the Web Opac Parameters screen will display:



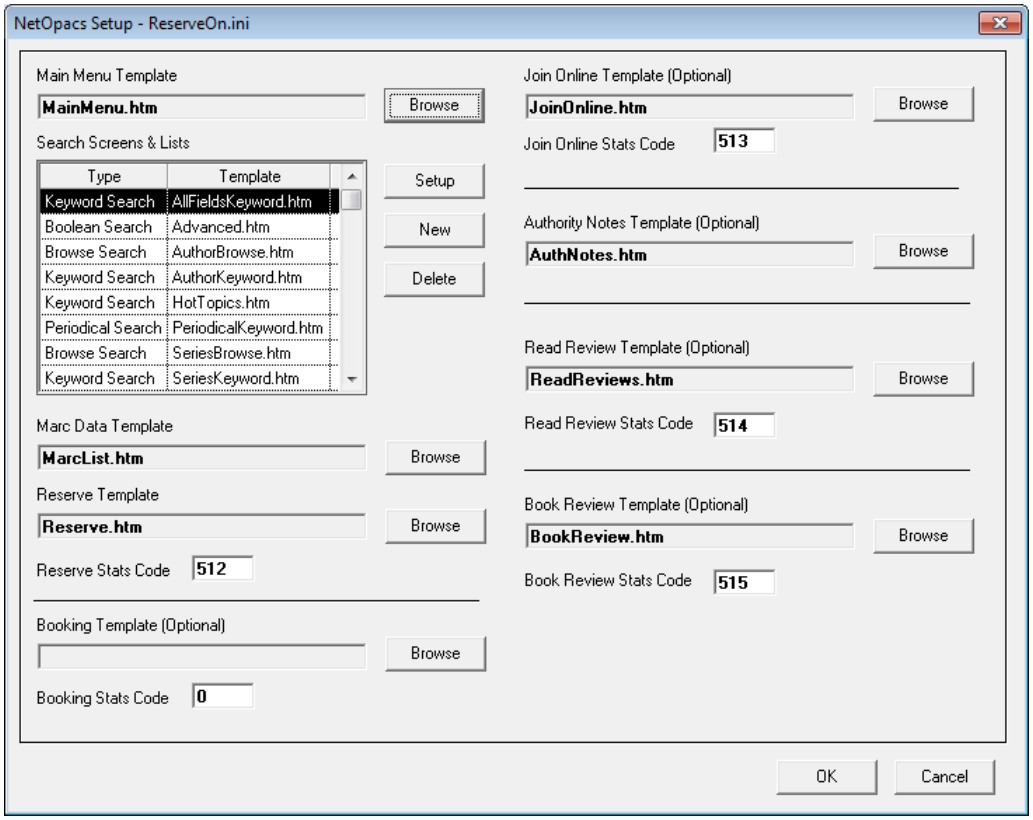
3. From the main menu, select **Html Parameters** > **Open...**
4. Navigate to drive containing your *NetOpacs* pages, and then locate the folder containing your *NetOpacs* pages themselves. The default location for these pages is generally a folder in the **NetOpacs/Samples** folder.

   For example: The pages being accessed in the above screenshot are in **C:\NetOpacs\Samples\51_EasyTabs** folder. You may find that your pages are in a personalised folder – for example: **C:\NetOpacs\Samples\oclclibweb**. Occasionally the files will be in a folder called **Live** (rather than the samples folder) – for example: **C:\NetOpacs\Live\oclclibweb**. For pages located on a Network server, then the location may be as follows: **E:\NetOpacs\Samples\oclclibweb**



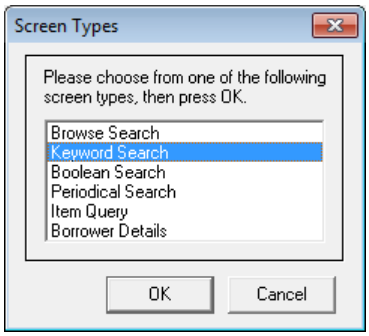
5. An **.ini** file will be visible, select it and click on the **Open** button – the NetOpacs Setup screen will display

   Please Note: Most recent *NetOpac* installations employ only a single **.ini** file called **Item_Result.ini** – if this is the case then select that. If there is more than one **.ini** file visible, then open both in turn and cross-check the settings to determine the most appropriate **.ini** file to use.

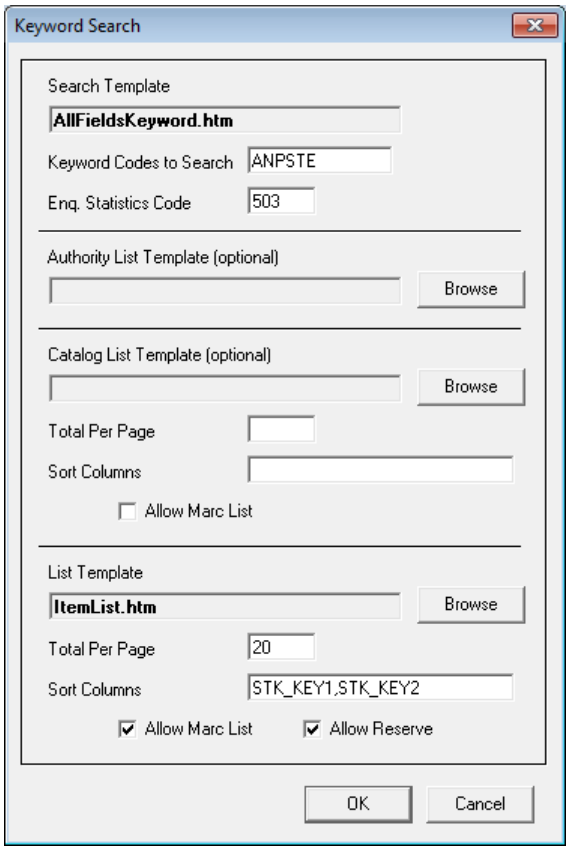


6. Highlight the **Template** you would like to check in the Search Screens & Lists box – for example: **Keyword Search – AllFieldsKeyword.htm**

7. Then click on the **Setup** button – the Screen Types prompt will display:

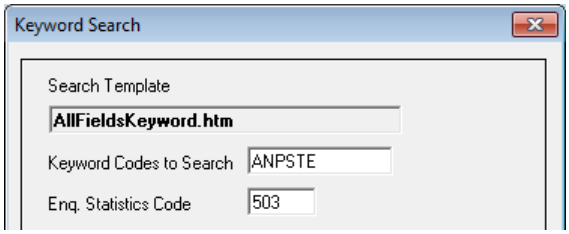


8. Select the Screen Type, in this case: **Keyword Search** and click on the **OK** button – the Keyword Search screen will display:



9. You will then be able to check Keyword Codes to Search field:

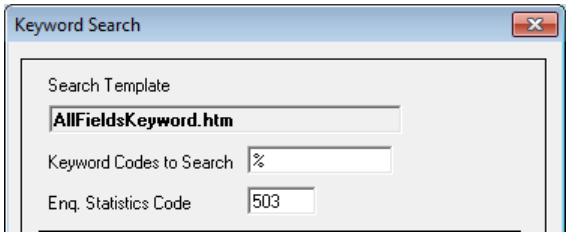
In the screenshot below, you can see that the Keyword Codes to Search includes the **T** and **E** codes (the codes allocated to the **Title** MARC Tags and **Series Title** MARC Tags (**T** and **E** respectively).



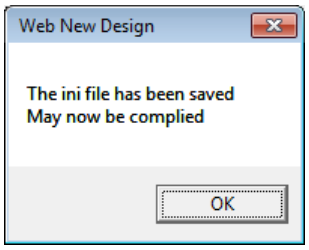
To insert/modify existing codes:

1. Type in the appropriate Keyword Code from the Keyword Descriptors list in the Authorities module in the Keyword Codes to Search field – for example: **E**

2. It is possible to enter multiple Search Codes – for example: **ASTE**
   (DO NOT enter any spaces or punctuation between the codes)
3. If you would like search ALL fields, enter: **%**



4. Click on the **OK** button to save settings – a prompt will display with the following message:
   The ini file has been saved
   May now be compiled

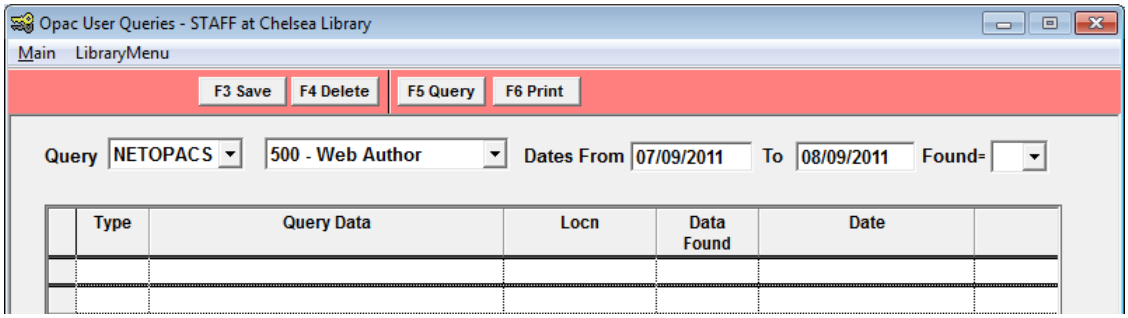


5. Click on the **OK** button

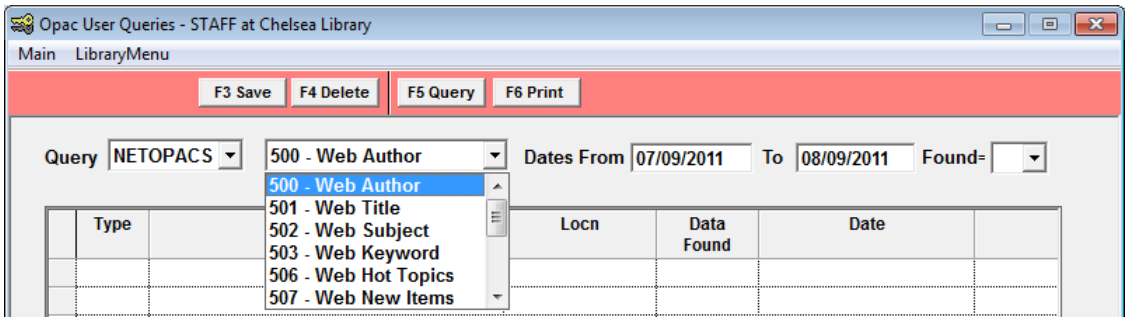
Log of Successful / Unsuccessful Searches

It is possible to look up a log of successful and unsuccessful *NetOpac*/*Opac* searches. This list can be used as a basis for adding *See* and *See Also* references to increase the success rates of searches for commonly typed words – for example: add a See reference to **Cookery** from **Cooking**

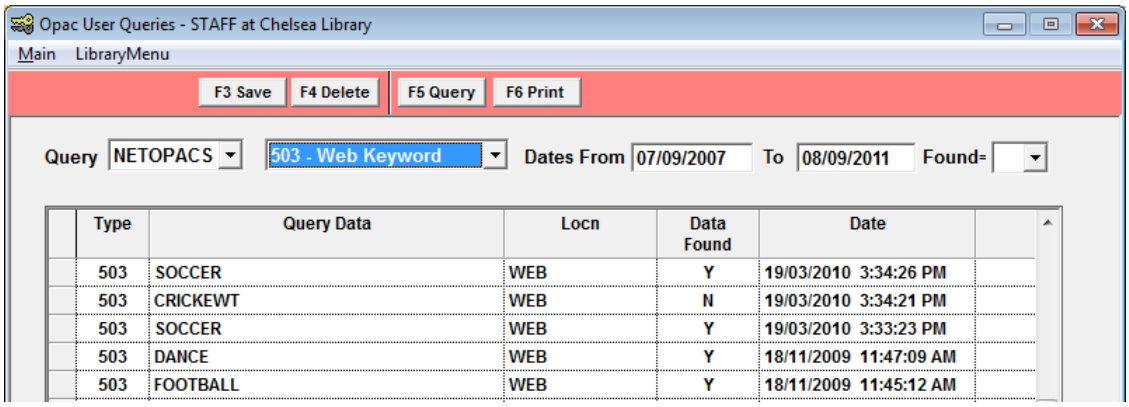
1. Launch the *Amlib* client
2. Go to the Supervisor module and select **Library Menu** > **Opacs** > **Opac Queries** – the Opac User Queries screen will display:



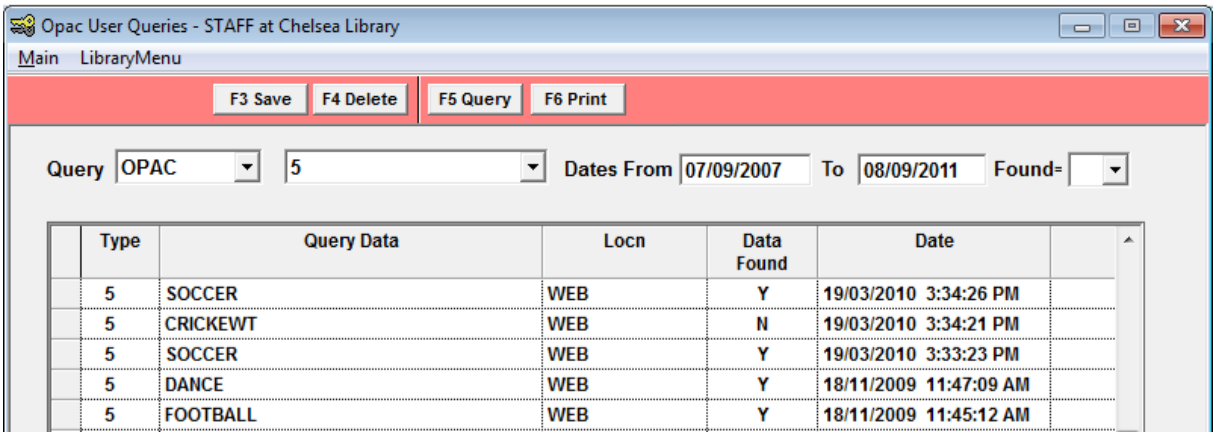
3. Set the Query: select either **NETOPACS** or **OPACS**



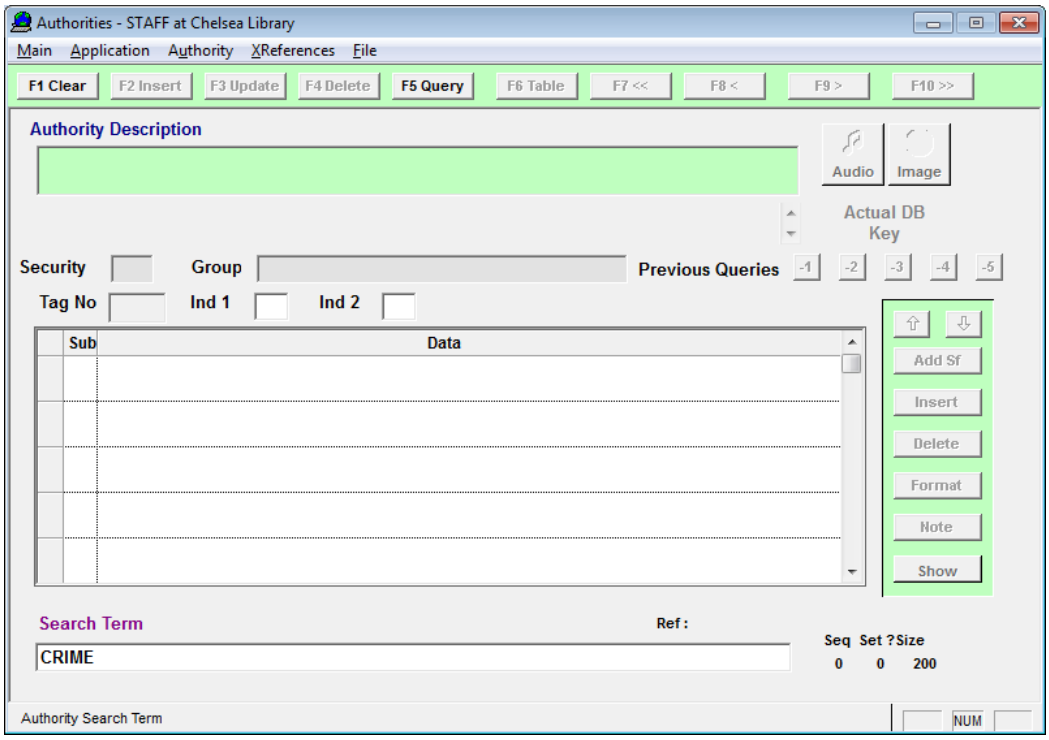
4. Set the Query drop-down to the option required – for example: **503 - WebKeyword**
5. Enter the **Dates From** and **To** for the required date range
6. Enter the Found = **Y** (for *successful* searches) or **N** (for *unsuccessful* searches) or leave **blank** to show *all* searches
7. Click the **F5 Query** button – the actual search terms entered by the user will then display:



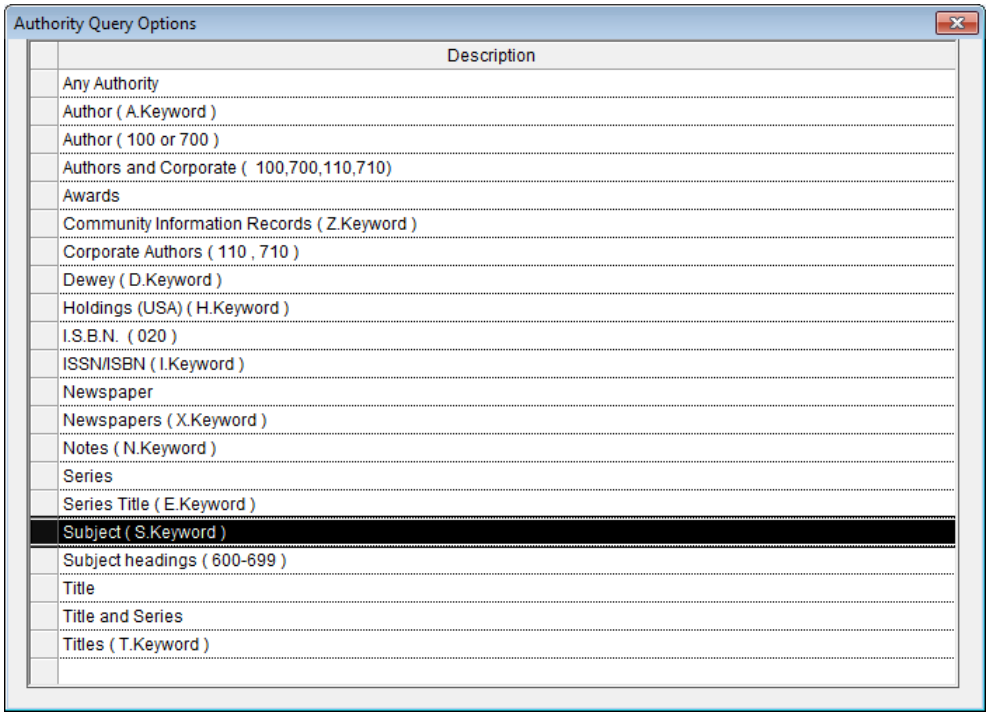
Please Note: If the traditional style of OPACs is used the same procedure can be used. The Numbers for the query are relative to the Buttons on the Search screen.



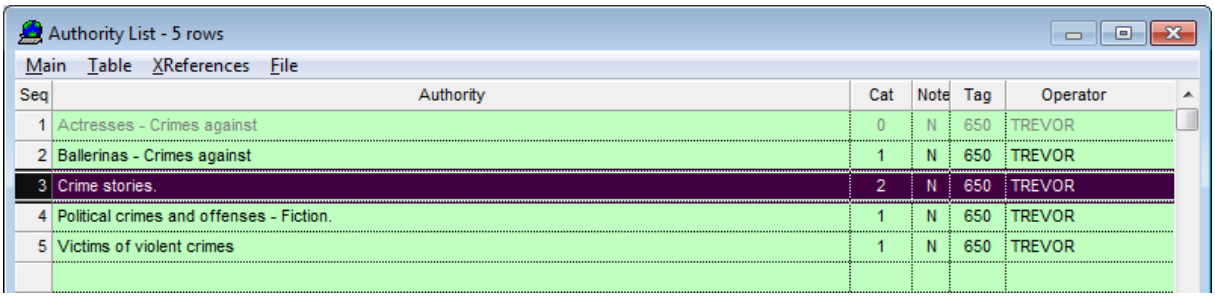
1. Launch the *Amlib* client
2. Go to **Main** > **Authorities** > **Authorities** – the Authorities screen will display:



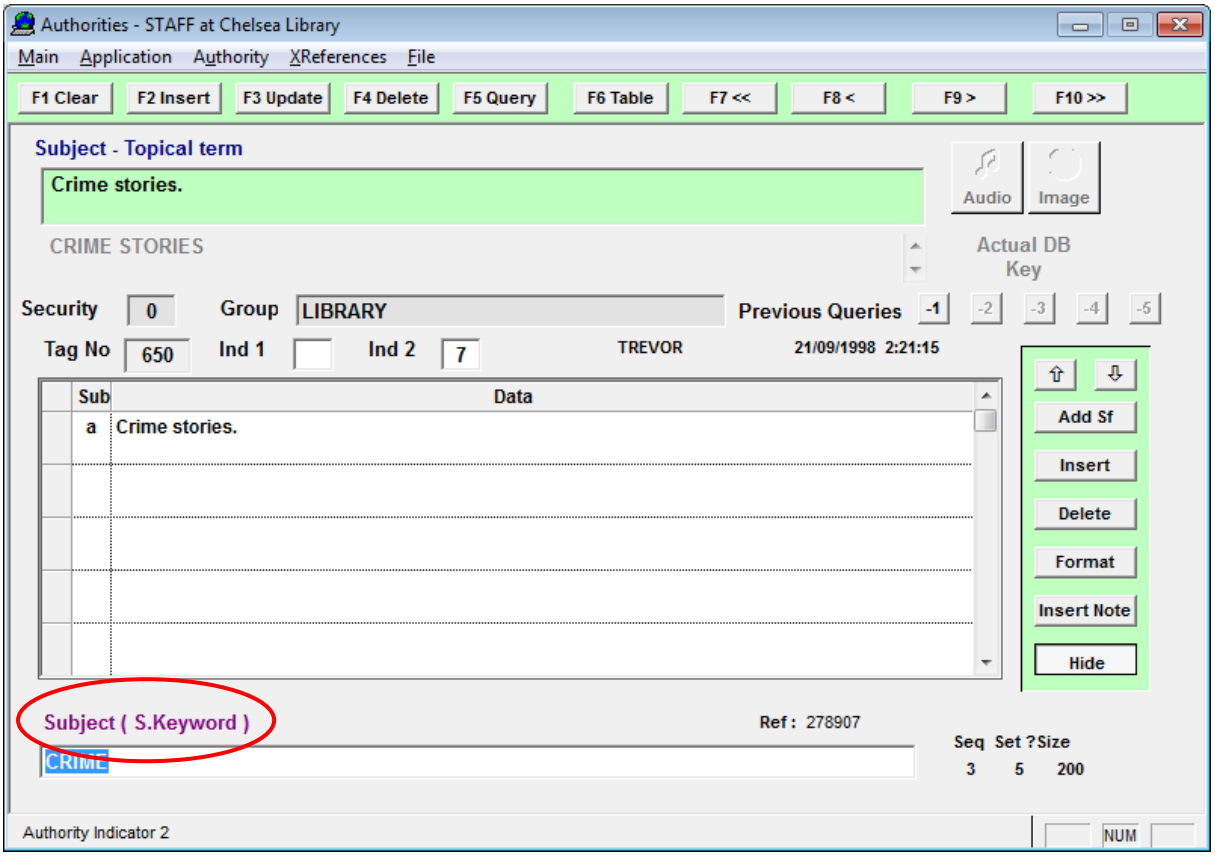
3. In the Search Term box, type in all (or part) of an Authority you would like to search for (for example: **Crime**) and click the **F5 Query** button – if this is the initial search in the Authorities screen, the Authority Query Options table will display:



4. Double-click on a type of search, for example: **Subject** heading (if that is what you search term is) – if there is more than one matching record, an Authority List will display:



5. Double-click on a selection (for example: **Crime Stories**) – the selected Authority will display on the Authorities screen:



Note: The Search Term heading has changed to selected Search Term – for example: Subject (S.Keyword)

To choose a new Authority search option:

- From the Authorities menu, select **Authority** > **AuthorityEnquiry** – the Authority Query Options table will redisplay

HINT: It is useful to visually check Authority Tags for duplicates by searching – for example: 100 Tags as an **Author Browse** search for **A** entries, **B** entries, etc.

Search Tips

Authorities can be searched for 'like' or 'exact' matches. For example: if the term "**Sport and Politics**" was being searched, typing in '**Sport and**' should find the term. **'= Sport**' will not find the term

because this search will find the exact Authority of **Sport**. When not using the equal sign anything like the term will be returned.

Wildcards can also be used in searches. You may add a wildcard **%** anywhere in the term. The system automatically adds one to the end of the term

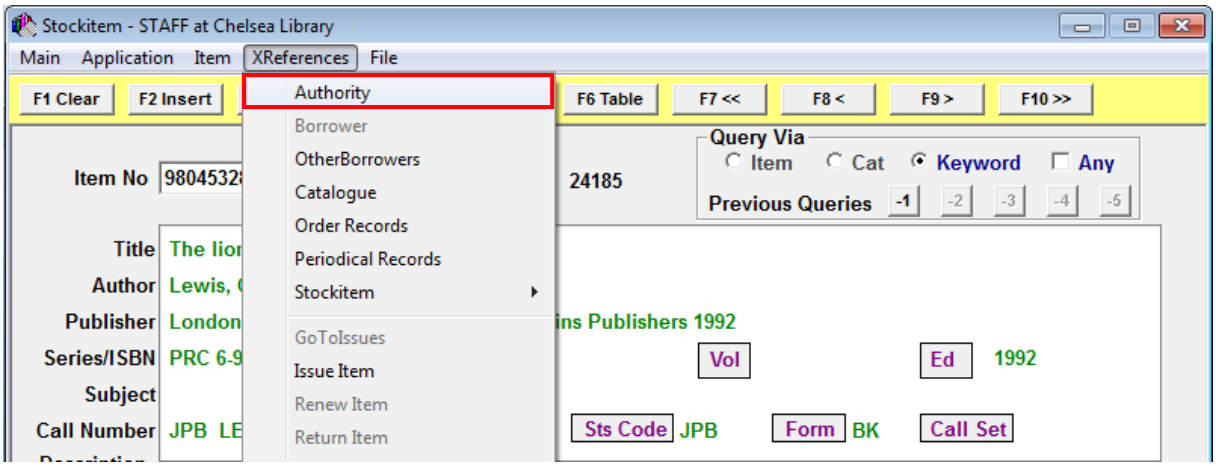
- For example: if **%CAT** which will search anything that contains the term **CAT** anywhere in the heading

SEARCH STRING	DESCRIPTION
ABCD	will return anything starting with **ABCD**
=ABC	will only return **ABC**
AB%D	will return anything starting with **AB** and containing a **D**
ABC\ABD	will return anything starting with **ABC** or with **ABD**. The slash means OR and may be repeated
=ABC\ABD	will return **ABC** plus anything starting with **ABD**

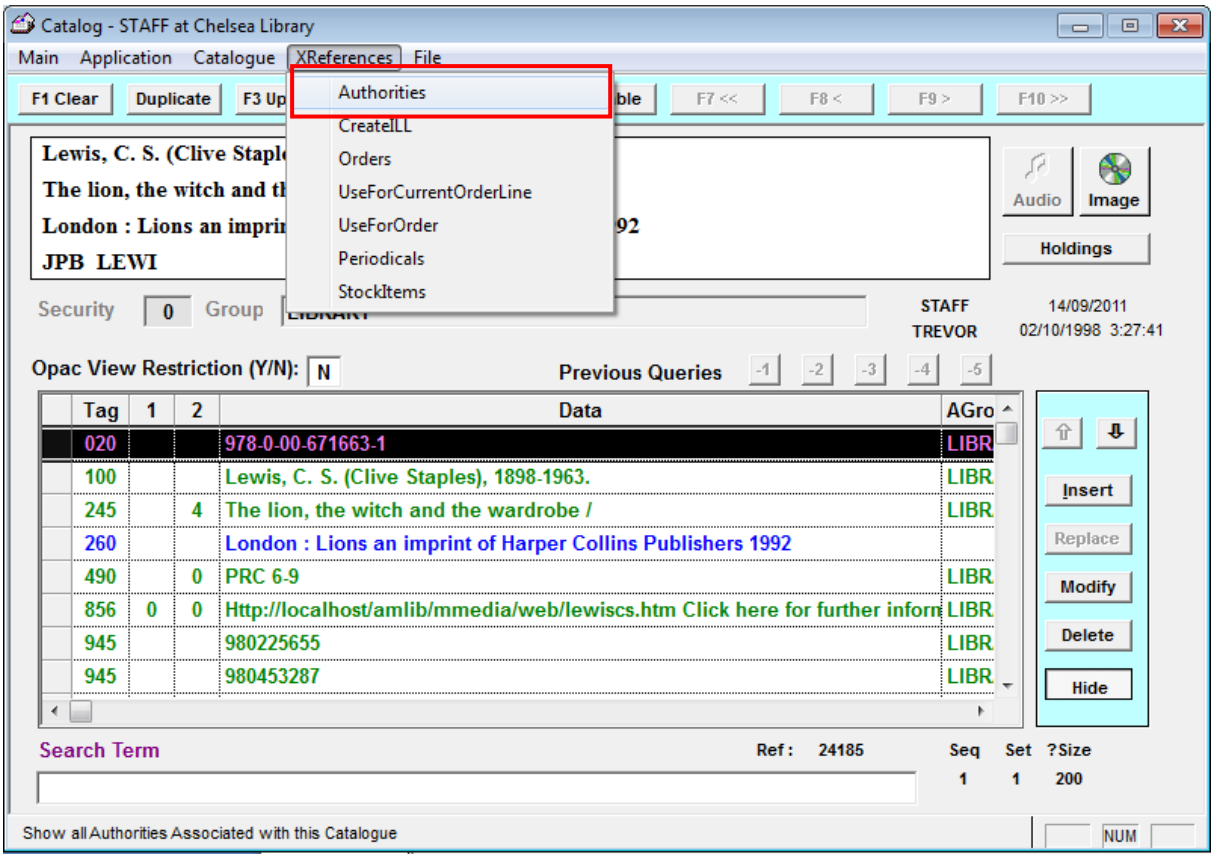
Searching for Authority Data in Stockitem/Catalogue

If a search is performed within *Catalogue* or *Stockitem* modules, we can XReference to the *Authorities* module and see how the data is stored as the Authority.

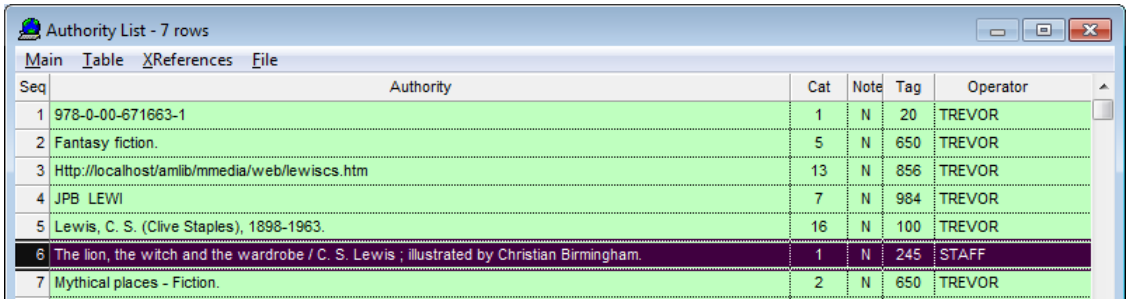
1. XReference to the *Authorities* module:
    - In the Stockitem screen: from the menu, select **XReferences** > **Authority**:



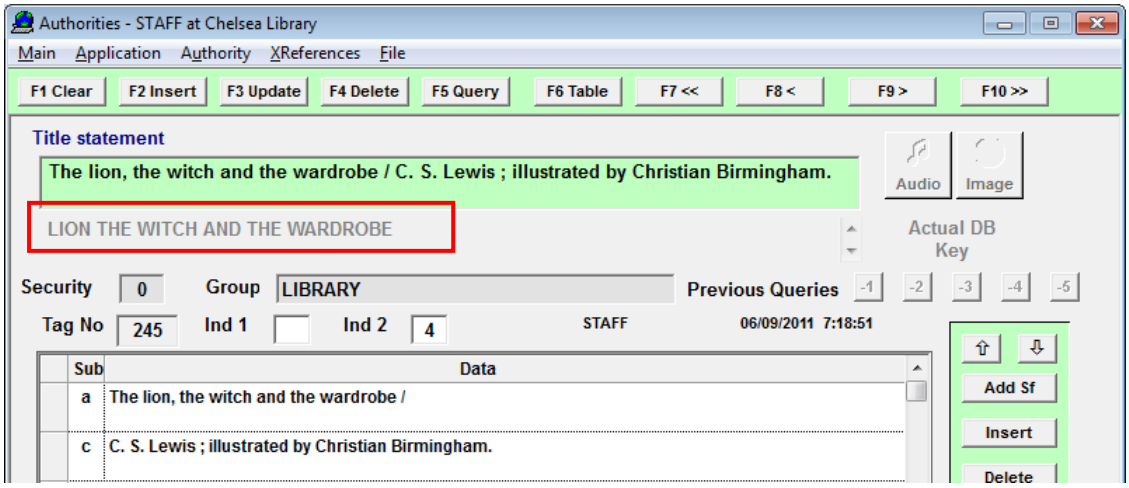
    - In the Catalog screen: from the menu, select **XReferences** > **Authorities**:



The Authority List will display:



2. Double-click on an entry to display a particular Authority (for example: the Title entry) – the Authority will display in the Authorities screen:

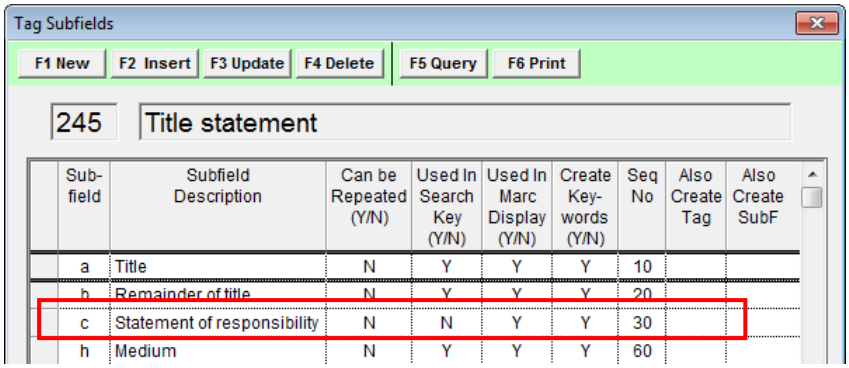


- The text in **BOLD GREY** is how the text is stored in the database: notice the *stop word* on "**THE**" and the dropping of punctuation – semi-colon (**;**) and full stops (**.**) – in the database key and is used for search purposes

3. This is dependent on the Marc Tag and the Subfields:

   a. From the menu, select **Application** > **MarcTags** – the Marc Tags Within the System screen will display

   b. Select the **245 | Title** Tag – and click the **F7 SubF** button – the Tag Subfields screen will display:



   c. Note the Used in Search Key (Y/N) setting for the Subfield **c** (**$c**) is set to **N** (for **No**) so it does not appear in the actual database key (see above) for searchin

Cross Referencing

XReferences can be accessed from various applications to the *Authorities* module.

- For example: Authorities related to a particular Catalogue record can be viewed by selecting **XReferences** > **Authorities** from the *Catalogue* module

Within the *Authorities* module, Catalogue records and Stockitems associated with the Authority can be accessed from the **XReferences** menu.

Catalogue Keyword Searches

Within the Catalog screen, searching can be done with keywords.

SEARCH TERM	OPERATOR	EXAMPLE
OR	**** backward slash	**ABC \ ABD** results in **ABC** or **ABD**
AND	space	**ABC ABD** results in **ABC** and **ABD**
NOT	- minus	**ABC - ABD** results in **ABC** not **ABD**

- Keyword terms may be prefixed with a library-defined restrictor – for example, **t**.ABC \ **s**.ABD = title having **ABC** or subject having **ABD**.
- These Keyword prefixes (for example: **t** for Title, **s** for Subject or **a** for Author) are defined in the Marc Keywords Restrictors screen (**Application** > **KeywordDesc**) and may be different according to your defaults at installation
- Prefixes may be typed in UPPER or lower case

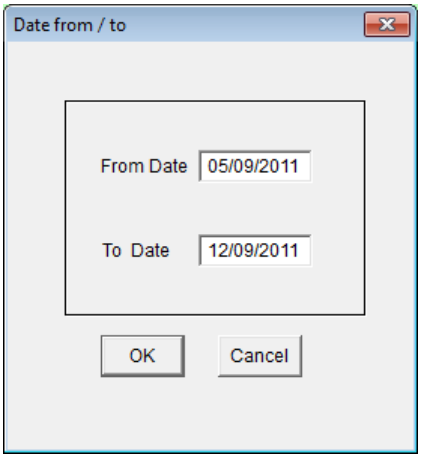
Please Note: Duplicate Authorities can be removed with the Authority Replace or Merge options

- See: Authority Maintenance & Parameters for more information

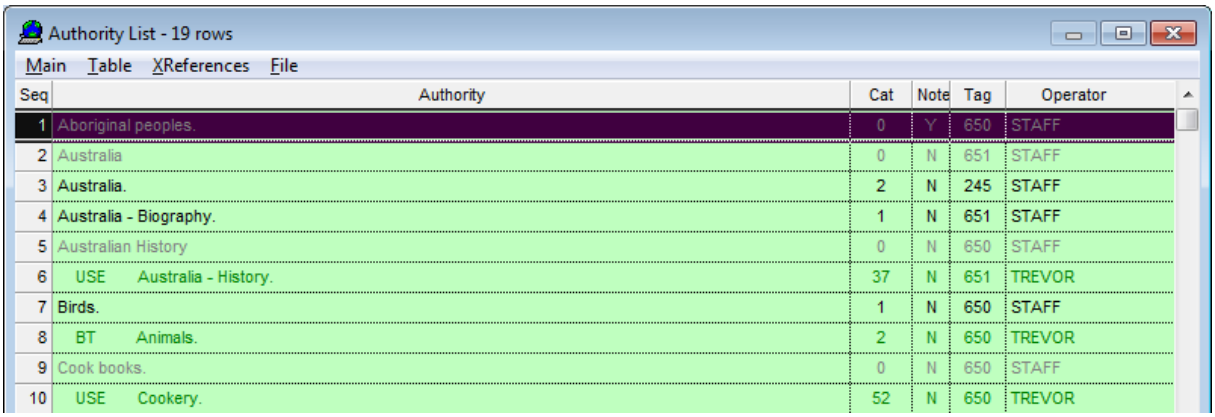
Authority Date Greater Less

It is possible to set a Date search, using a From Date and a To Date to see Authorities that have been changed.

1. From the Authorities menu, select **Authority** > **AuthorityDateGreaterLess** – the Date from / to prompt will display:



2. Change the From and To Dates or leave the dates which are set to show the last 7 days
3. Click the OK button and a table of authorities will be displayed in an Authorities List:



Seq	Authority	Cat	Note	Tag	Operator
1	Aboriginal peoples.	0	Y	650	STAFF
2	Australia	0	N	651	STAFF
3	Australia.	2	N	245	STAFF
4	Australia - Biography.	1	N	651	STAFF
5	Australian History	0	N	650	STAFF
6	USE Australia - History.	37	N	651	TREVOR
7	Birds.	1	N	650	STAFF
8	BT Animals.	2	N	650	TREVOR
9	Cook books.	0	N	650	STAFF
10	USE Cookery.	52	N	650	TREVOR

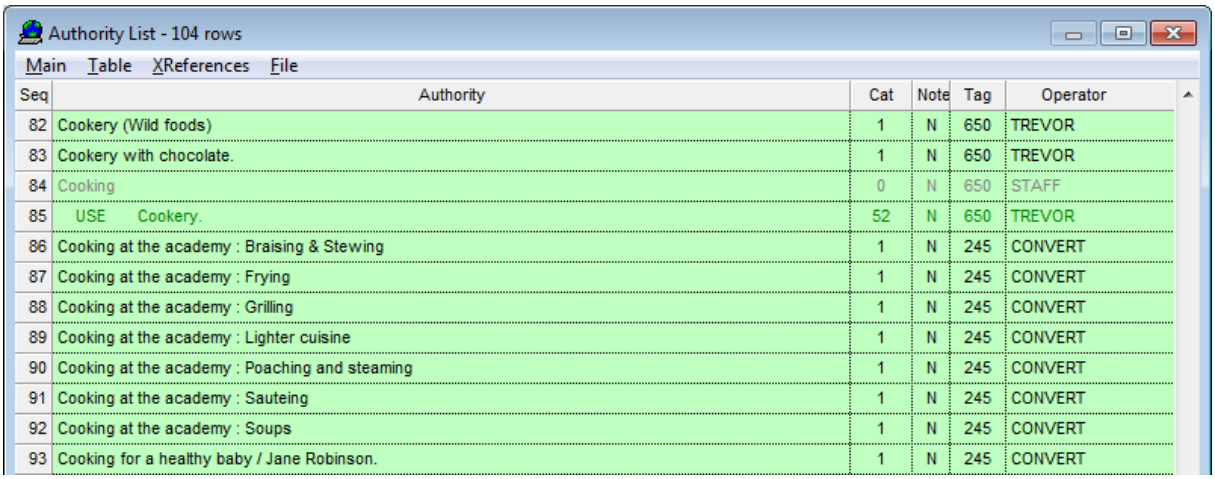
Show Unused/Used Authorities

- **Main** > **Authorities** > **Authorities**

When searching for Authorities, it is possible to see all Authorities, or only those being used in Catalogue records.

- To show USED Authorities only: from the Authorities menu, select **Authority** > **ShowUnusedAuths** so that *it is no longer* **ticked**

The only unused Authorities are the Non-Allowed headings shown in ***grey***.

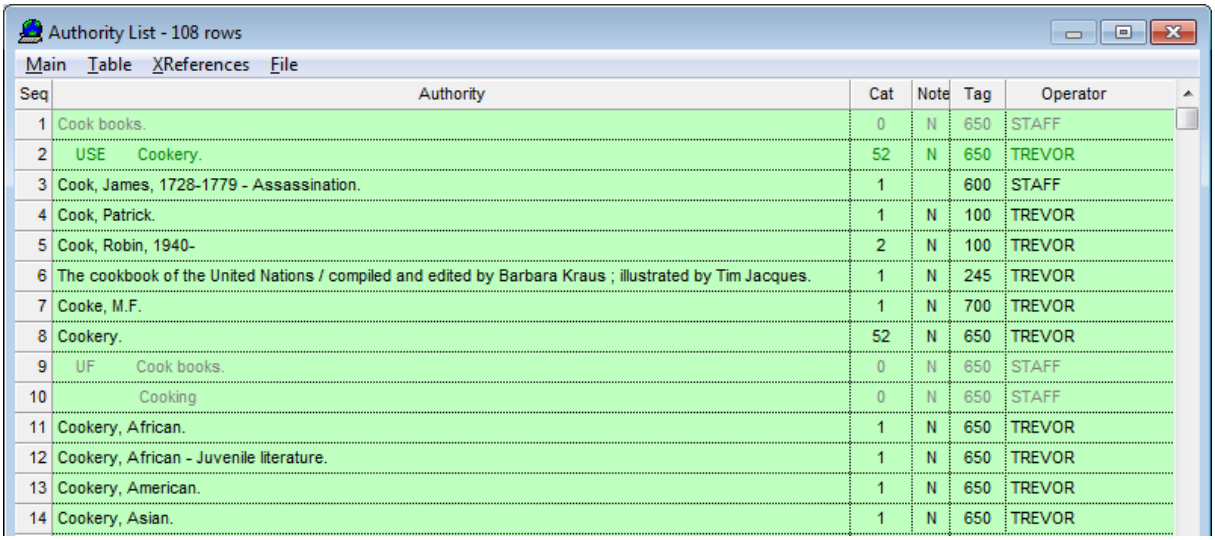

Authority List - 104 rows

Main Table XReferences File

Seq	Authority	Cat	Note	Tag	Operator
82	Cookery (Wild foods)	1	N	650	TREVOR
83	Cookery with chocolate.	1	N	650	TREVOR
84	Cooking	0	N	650	STAFF
85	USE Cookery.	52	N	650	TREVOR
86	Cooking at the academy : Braising & Stewing	1	N	245	CONVERT
87	Cooking at the academy : Frying	1	N	245	CONVERT
88	Cooking at the academy : Grilling	1	N	245	CONVERT
89	Cooking at the academy : Lighter cuisine	1	N	245	CONVERT
90	Cooking at the academy : Poaching and steaming	1	N	245	CONVERT
91	Cooking at the academy : Sauteing	1	N	245	CONVERT
92	Cooking at the academy : Soups	1	N	245	CONVERT
93	Cooking for a healthy baby / Jane Robinson.	1	N	245	CONVERT

- To show ALL Authorities: from the Authorities menu, select **Authority** > **ShowUnusedAuths** so that *it is* **ticked**

Any Authorities that are not used in a Catalogue or are non-preferred headings show in ***grey***.


Authority List - 108 rows

Main Table XReferences File

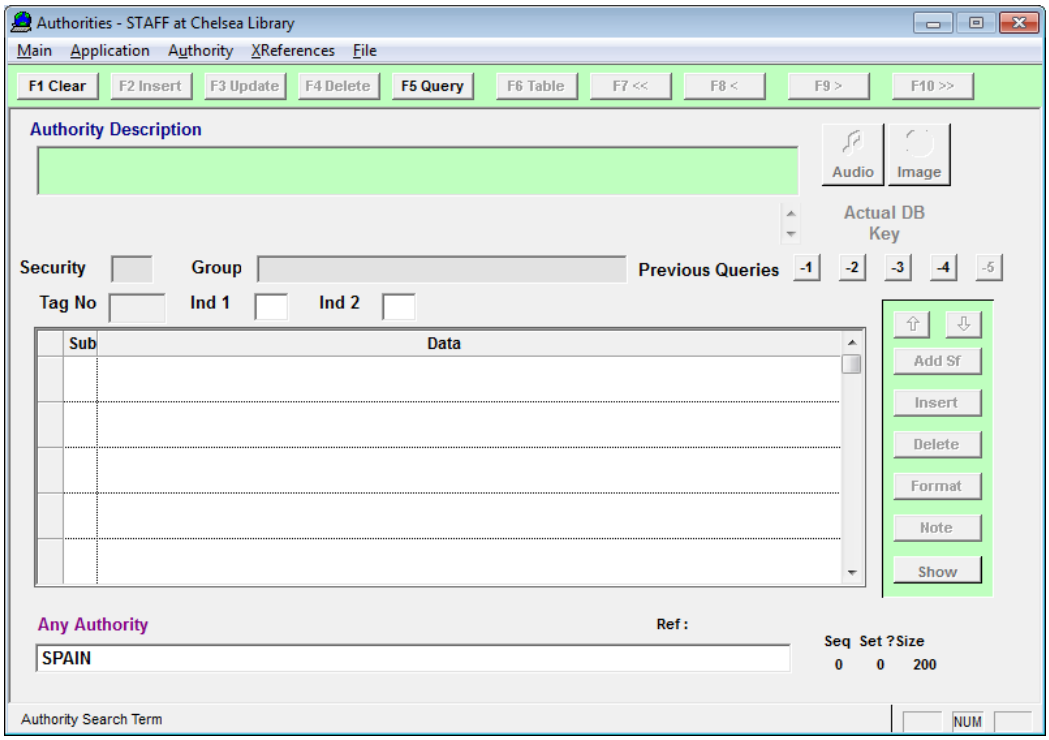
Seq	Authority	Cat	Note	Tag	Operator
1	Cook books.	0	N	650	STAFF
2	USE Cookery.	52	N	650	TREVOR
3	Cook, James, 1728-1779 - Assassination.	1		600	STAFF
4	Cook, Patrick.	1	N	100	TREVOR
5	Cook, Robin, 1940-	2	N	100	TREVOR
6	The cookbook of the United Nations / compiled and edited by Barbara Kraus ; illustrated by Tim Jacques.	1	N	245	TREVOR
7	Cooke, M.F.	1	N	700	TREVOR
8	Cookery.	52	N	650	TREVOR
9	UF Cook books.	0	N	650	STAFF
10	Cooking	0	N	650	STAFF
11	Cookery, African.	1	N	650	TREVOR
12	Cookery, African - Juvenile literature.	1	N	650	TREVOR
13	Cookery, American.	1	N	650	TREVOR
14	Cookery, Asian.	1	N	650	TREVOR

Change the Marc Tag of an Authority

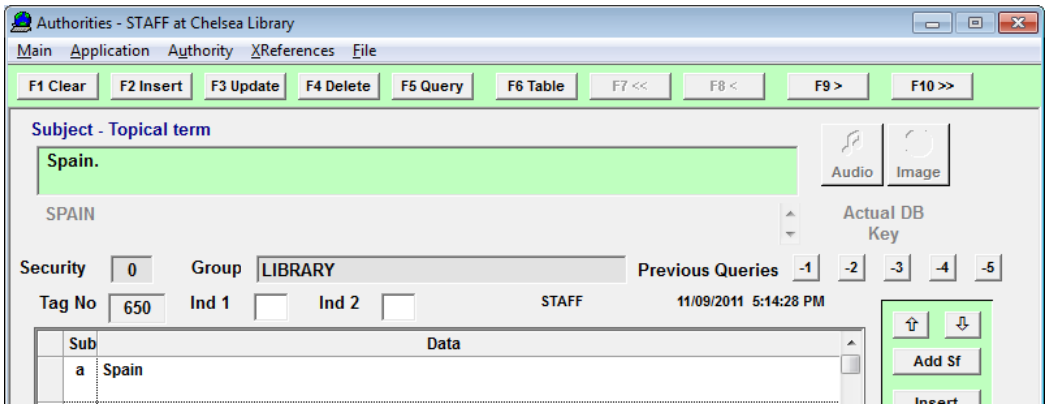
Change a Single Tag

It is possible to change a single Authority Marc Tag. This would be particularly useful in the situation where a Subject Heading has been created using the incorrect Marc Tag. In the example below a 650 Tag has been incorrectly used for a 651 Marc Tag. This can now be changed.

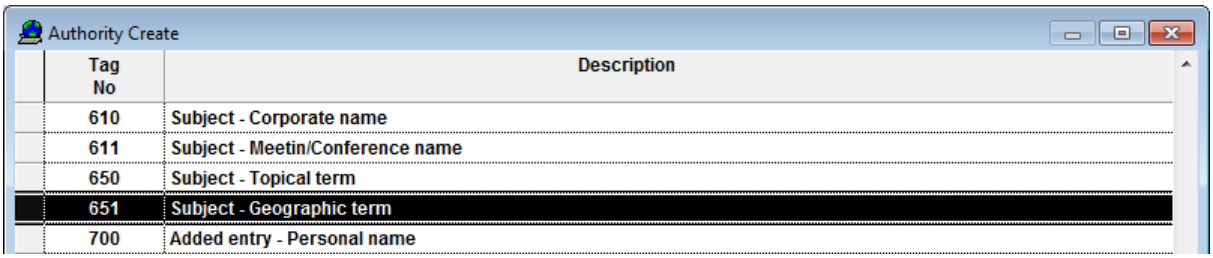
1. Launch the *Amlib* client
2. Go to **Main** > **Authorities** > **Authorities** – the Authorities screen will display:



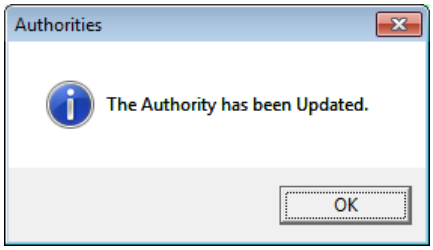
3. In the Search Term box, enter the incorrect Marc Tag (for example: **Spain**) and click the **F5 Query** button
4. If an Authority List displays, double-click on the Tag to be changed – the Tag will display on the Authorities screen:



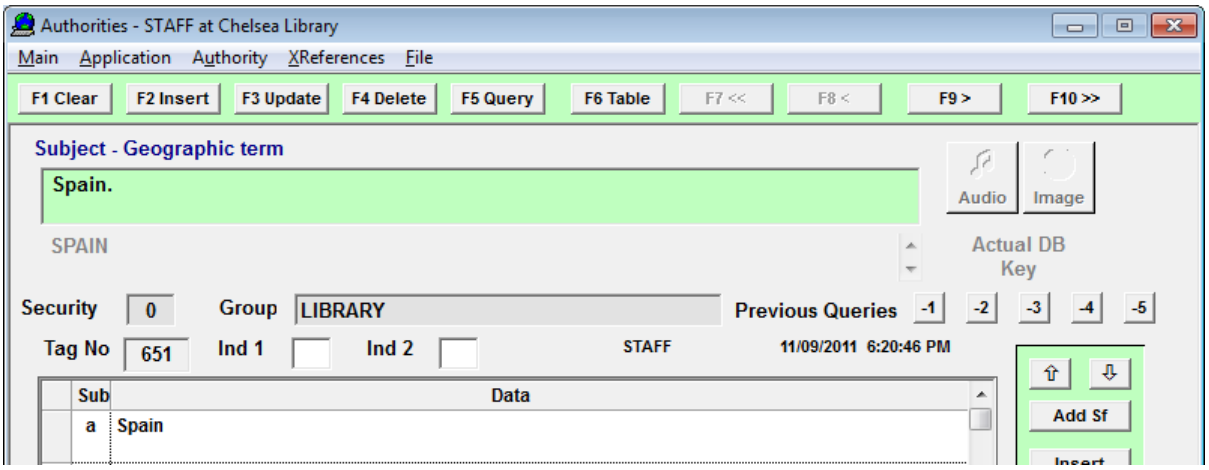
5. From the menu, select **Authority** > **AuthorityChangeTag** – the Authority Create screen will display:



6. Scroll through and double-click the desired Marc Tag to select – in this example, we are selecting the **651 | Subject – Geographic Term** Tag
7. The Authority will be automatically changed to the correct Marc Tag – a prompt with the following message will display: **The Authority has been updated.**



8. Click the **OK** button

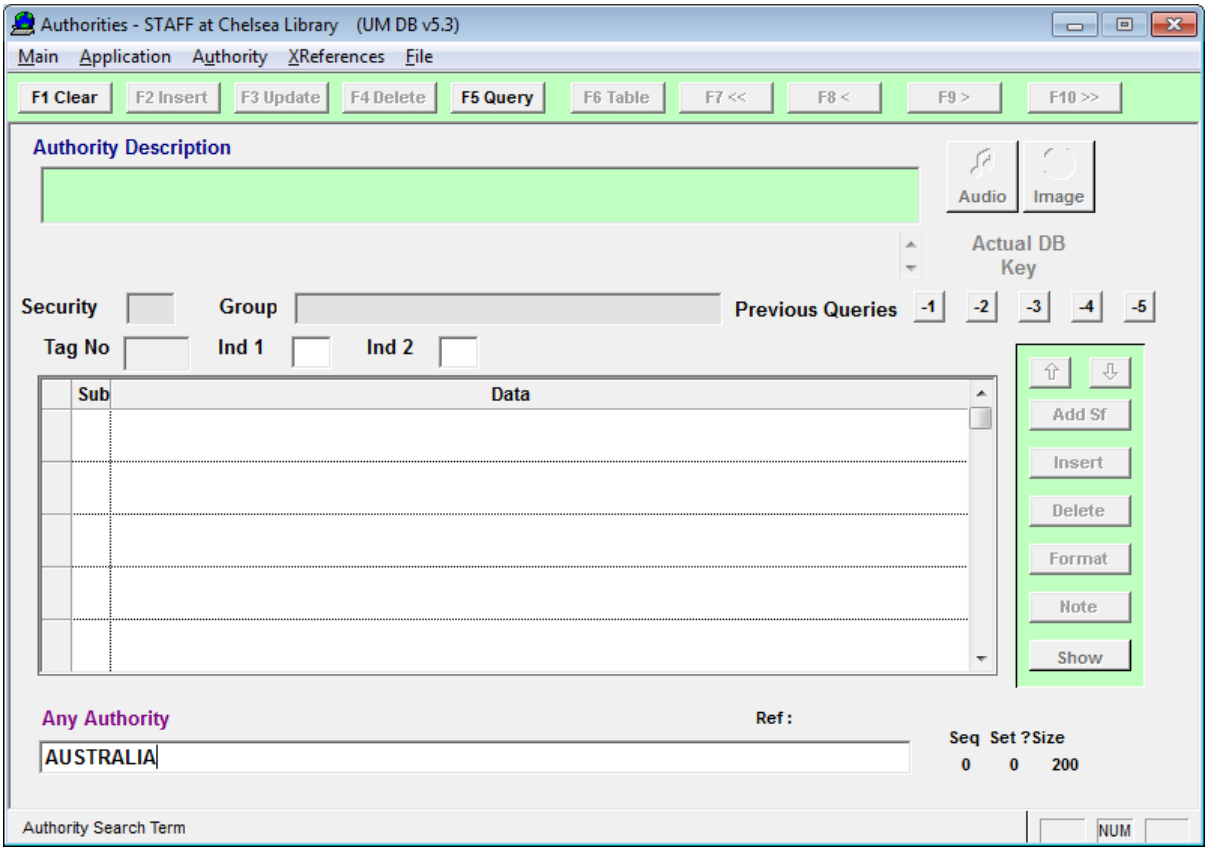


9. Any catalogues associated with the Marc Tag will also be updated

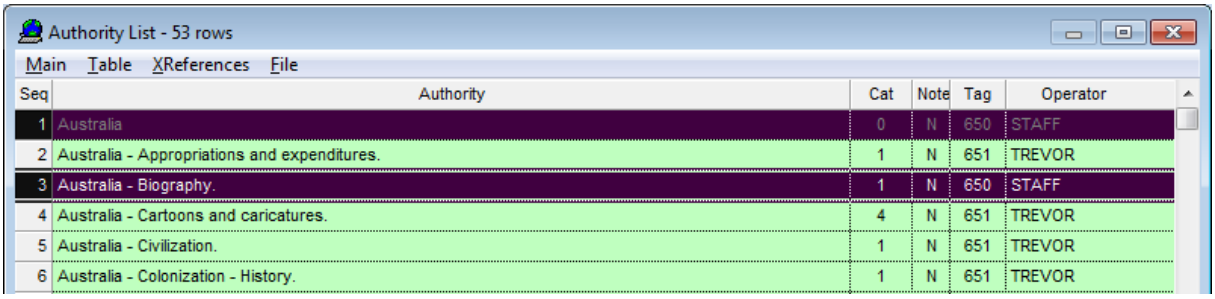
Change Multiple Tags (using a Saved File)

It is also possible to change the Tag of Authorities that have previously be saved into a File.

1. Launch the *Amlib* client
2. Go to **Main** > **Authorities** > **Authorities** – the Authorities screen will display:

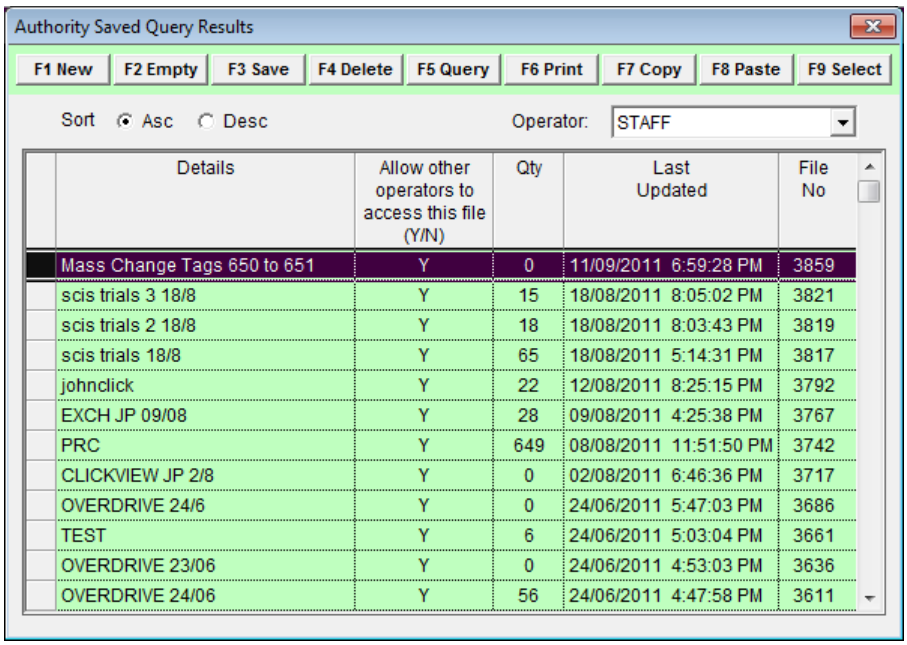


3. Perform a **F5 Query** search for Authorities using the Subject Headings Browse Search – for example: Find all entries that start with **AUSTRALIA** – the results will display in the Authority List screen:

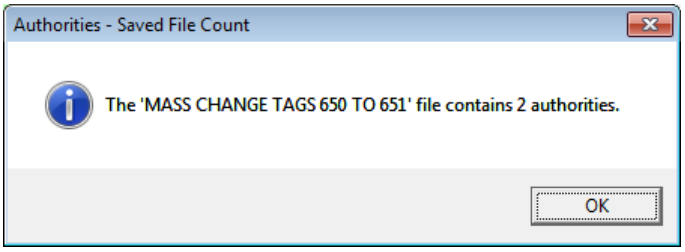


4. Highlight any entries that should be **651** Tags
   Please Note: It is only possible to change Tags with the same Tag No (for example: **650** to **651**)

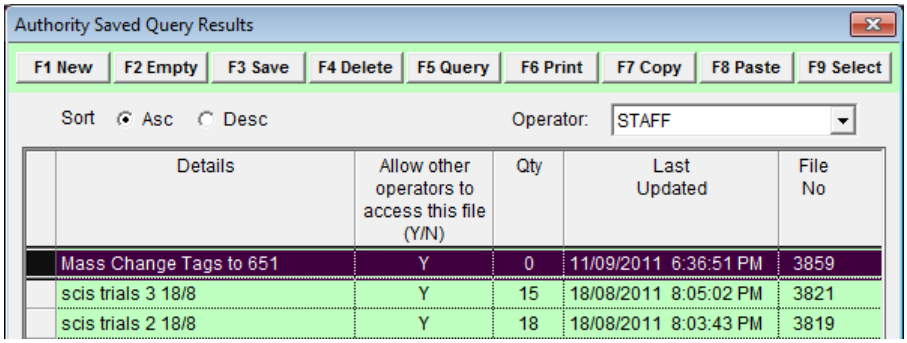
5. From the menu, select **File** > **Save Marked** – the Authority Saved Query Results screen will display:



6. Click the **F1 New** button to create a new file, enter the Details (for example: **Mass Change Tags 650 to 651**) and click the **F3 Save** button
7. Highlight the Saved File and click the **F9 Select** button a prompt will display with the following message: **The 'XXXX' file contains XX authorities.**

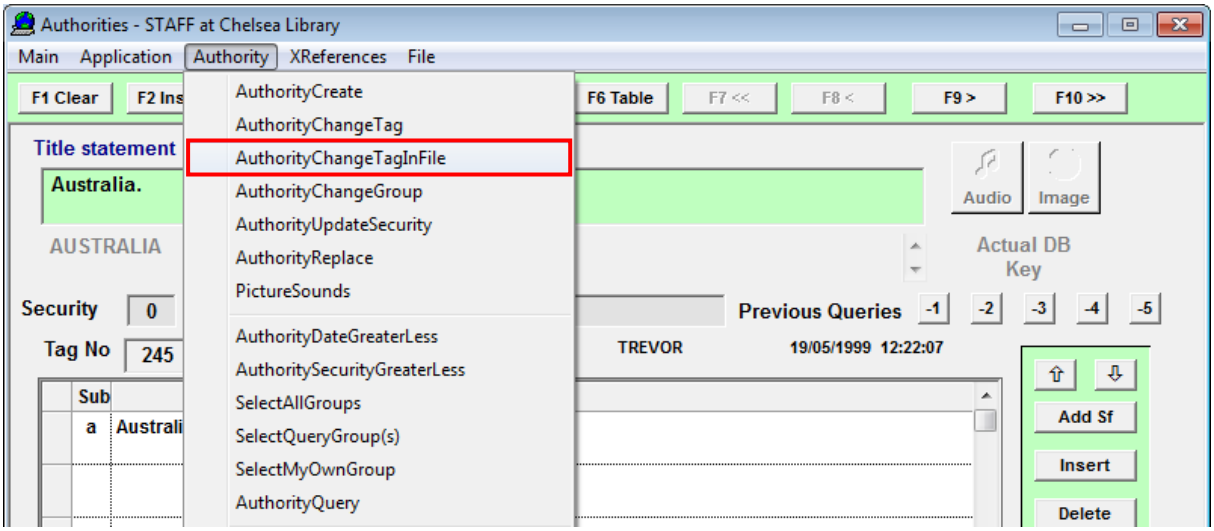


8. Click the **OK** button
9. Close the Authority List by clicking on the red **[X]**
10. From the Authorities menu, select **File** > **DisplayFile** –the Authority Saved Query Results screen will redisplay:

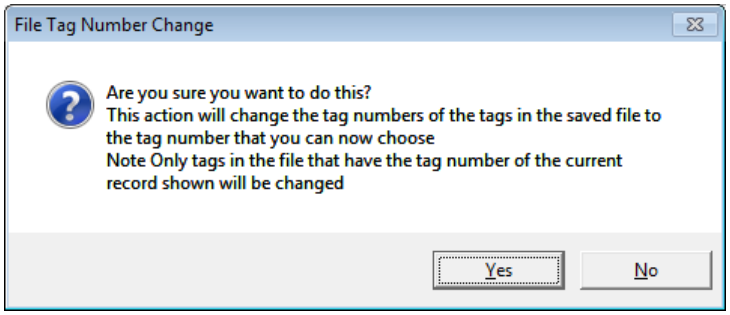


11. Highlight the Saved File and click the **F9 Select** button

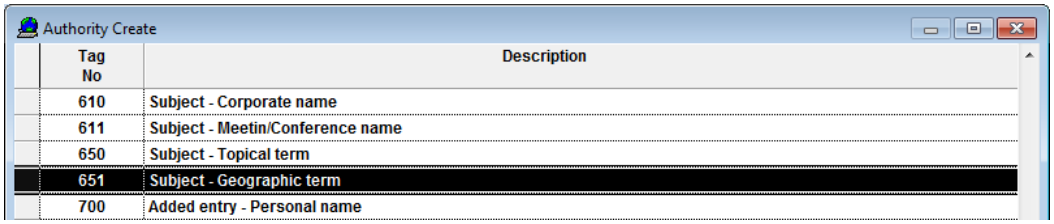
12. The saved Tags will redisplay in an Authority List
13. Double-click on the first entry – this will display on the Authorities screen:



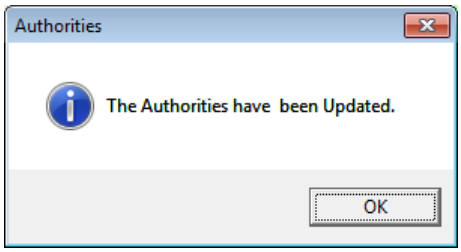
14. From the Authorities menu, select **Authority** > **AuthorityChangeTagInFile**
    Please Note: This menu option will be ***grey*** UNLESS a Saved File is selected first
15. A File Tag Number Change prompt with the following message will display:
    Are you sure you want to do this?
    This action will change the tag numbers of the Tags in the saved file to the tag number that you can now chose
    Note Only tags in the file that have the tag number of the current record shown will be changed



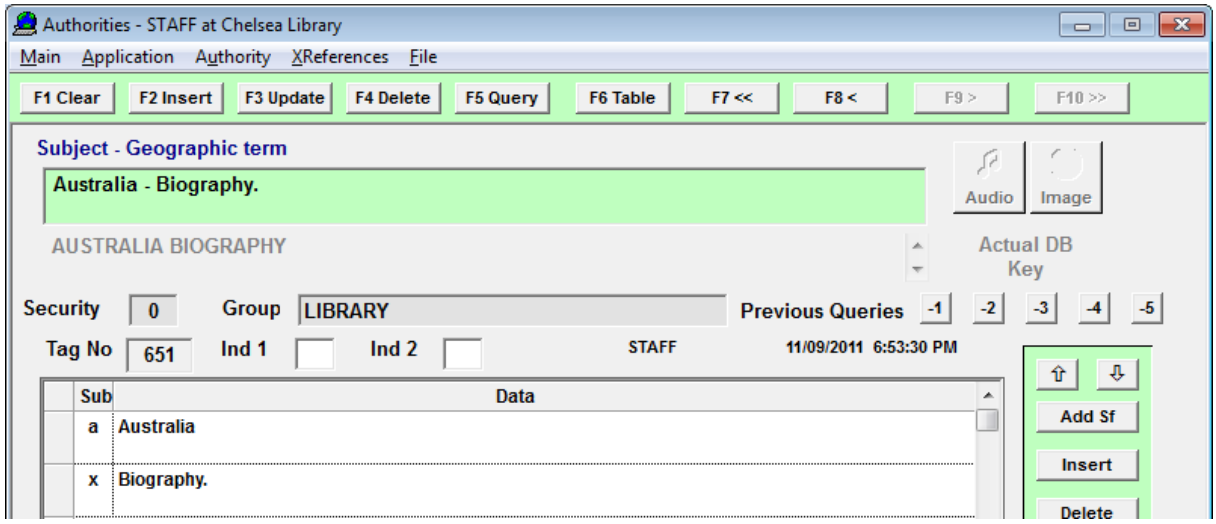
10. Click the **Yes** button – the Authority Create screen will display (click the **No** button to cancel):



11. Scroll through and double-click the desired Marc Tag to select – in this example, we are selecting the **651 | Subject – Geographic Term** Tag
12. The Authority will be automatically changed to the correct Marc Tag – a prompt with the following message will display: **The Authorities has been updated.**



13. Click the **OK** button



14. All the headings within the File will change to the specified Tag

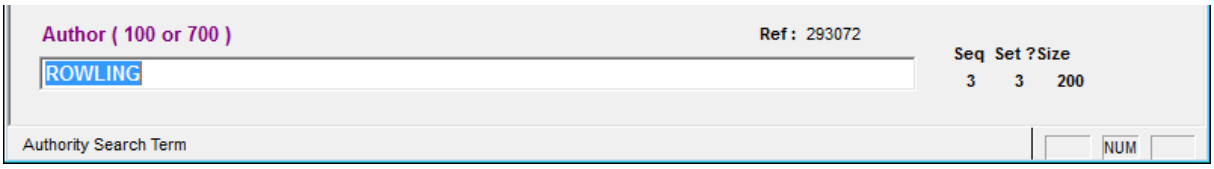
Authority Replace (Authority Merge)

This option replaces all occurrences of an Authority (usually Subject headings or Authors) with the selected Authority and can be used for Global Changes or Merges. All associated catalogue records and stockitems will now be attached to the same Authority.

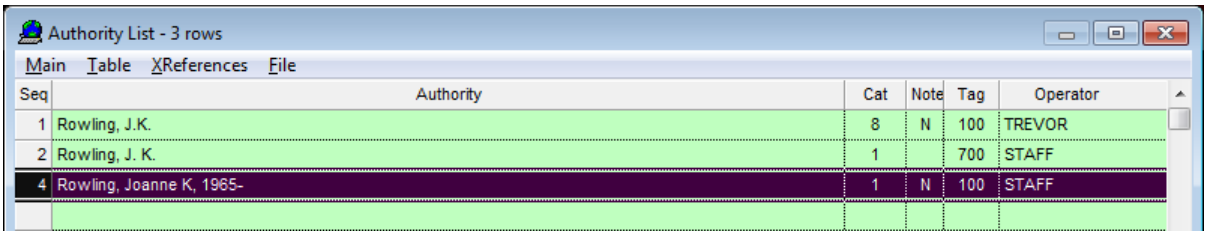
This procedure can ***only*** be performed on Authorities that have the same Tag number.

In the example, all occurrences of **Rowling, J. K.** will be changed to **Rowling, Joanne K., 1965-.**

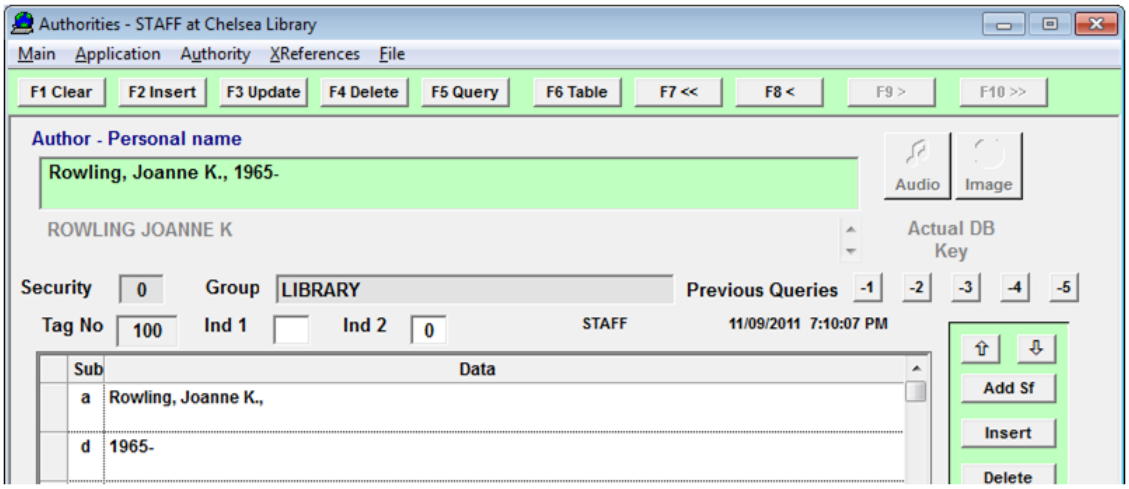
1. Launch the *Amlib* client
2. Go to **Main** > **Authorities** > **Authorities** – the Authorities screen will display
3. Find the CORRECT term that is to be used as the *replacement* by typing some or all of the term and clicking the **F5 Query** button



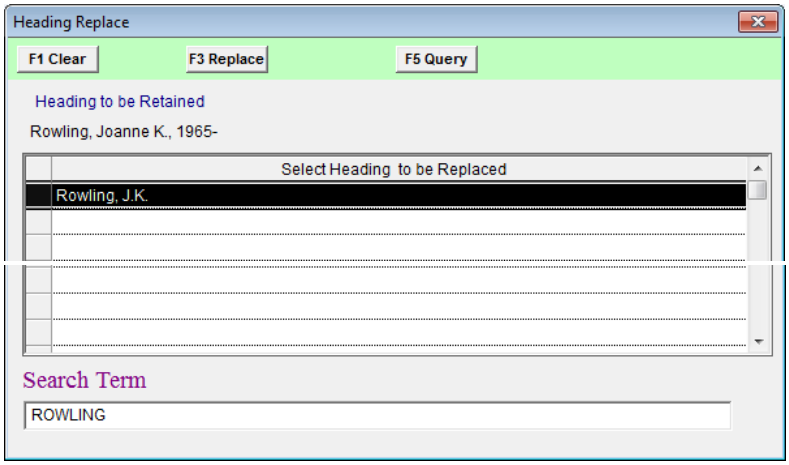
4. The results will display in the Authority List screen:



5. Double-click the CORRECT Tag to select it – the CORRECT Tag will display in the Authorities screen – in this example: **Rowling, Joanne K., 1965-**

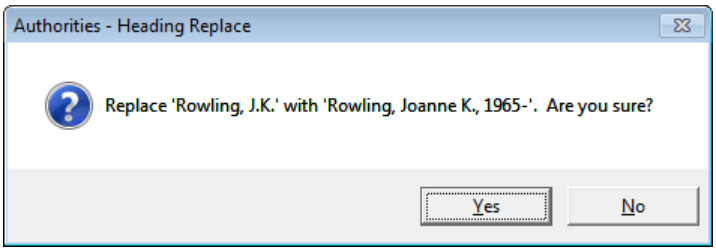


6. From the Authorities menu, select **Authority** > **AuthorityReplace** – the Heading Replace screen will display:

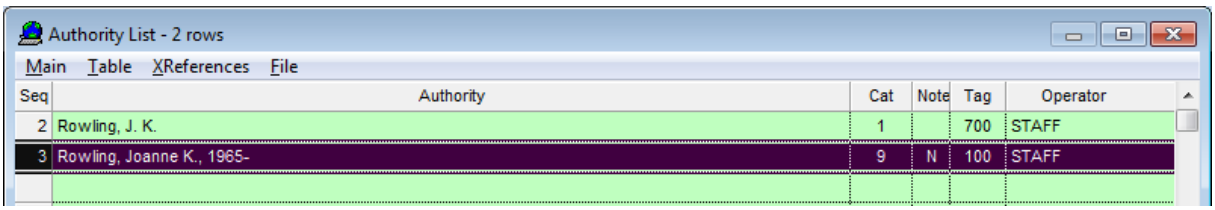


7. Find the INCORRECT term to alter to the correct term (for example: **Rowling, J. K.**) using the **F5 Query**

8. Highlight the heading to be replaced and click the **F3 Replace** button – a prompt will display with the following message: **Replace 'INCORRECT' with 'CORRECT'. Are you sure?**



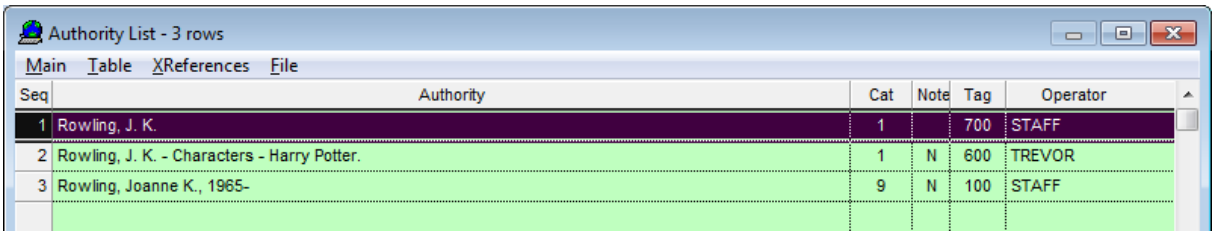
9. Clicking the **Yes** button will alter all instances of '**Rowling, J. K.**' to be replaced with '**Rowling, Joanne K., 1965 -**' (the term that is replaced will be deleted)



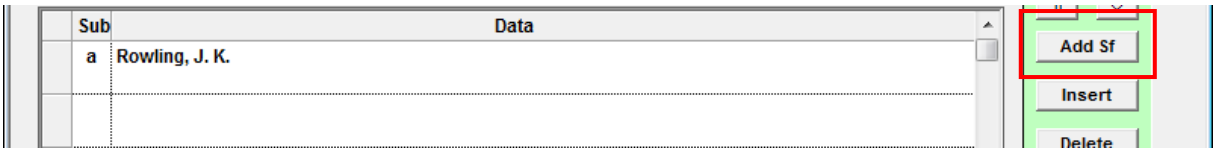
To Modify an Existing Authority

1. Launch the *Amlib* client
2. Go to **Main** > **Authorities** > **Authorities** – the Authorities screen will display
3. Type in the Search Term for the incorrect Tag and click the **F5 Query** button

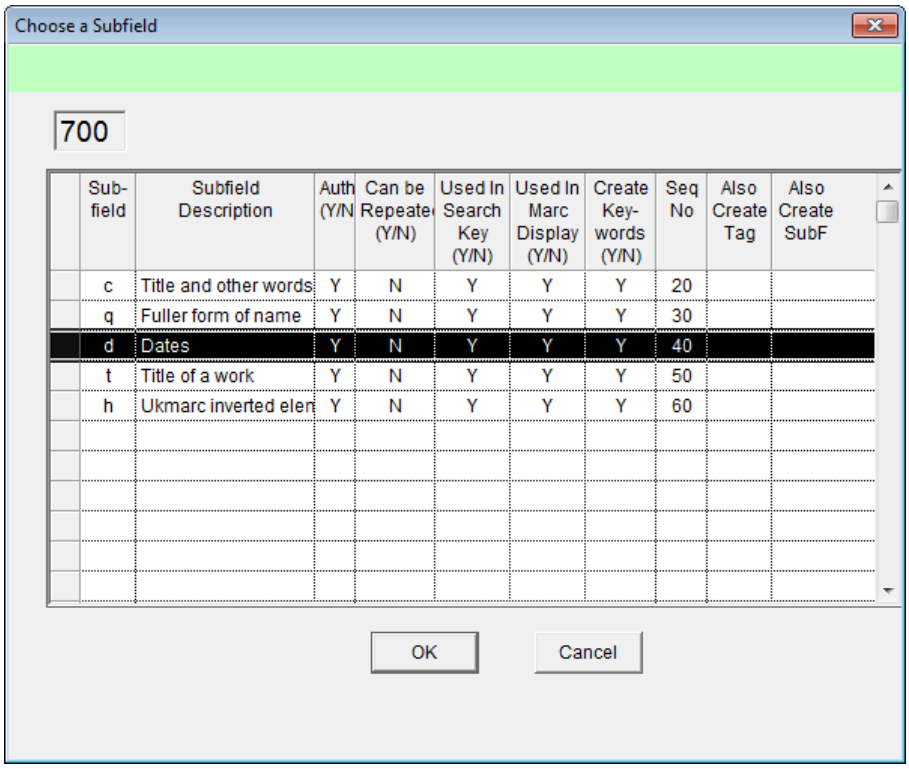
4. The results will display in the Authority List screen:



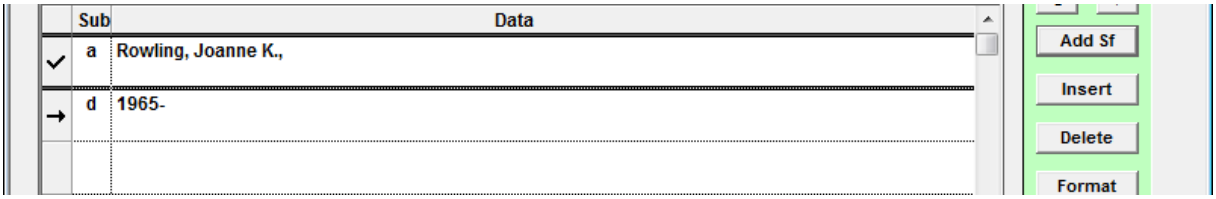
5. Double-click on the incorrect Tag – it will display in the Authorities screen



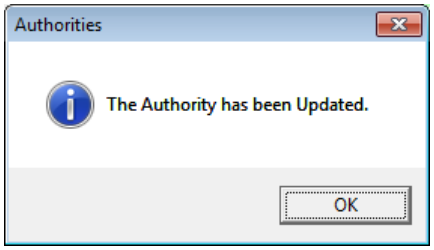
6. Overtype any fields to be modified
7. To add in any missing Subfields, click the **Add Sf** button alongside the Data window – the Choose a Subfield screen will display:



8. Highlight the Subfield to be added and click the **OK** button



9. Click the **F3 Update** button when complete – a prompt with the following message will display: **The Authority has been Updated.**



10. Click the **OK** button

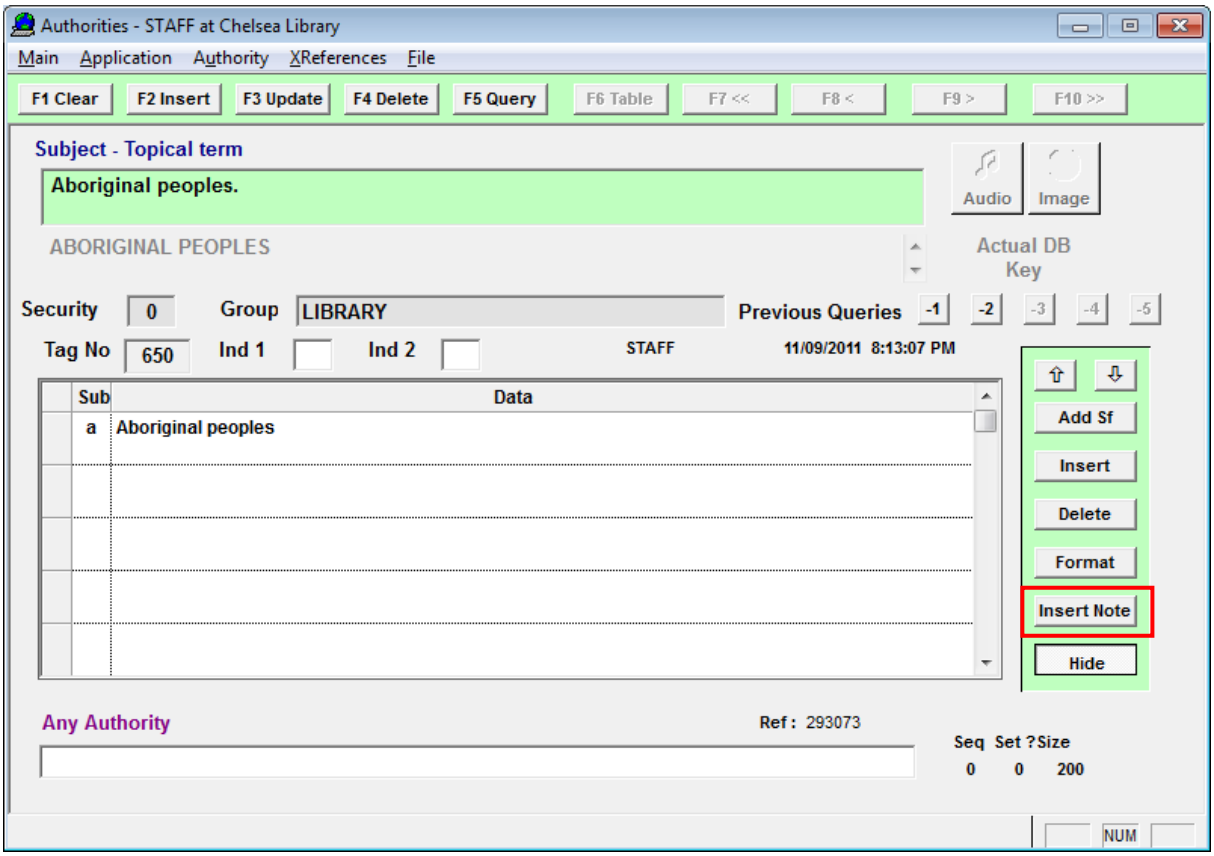
On update, this will change the display of any catalogue record using this Authority.

Scope Notes

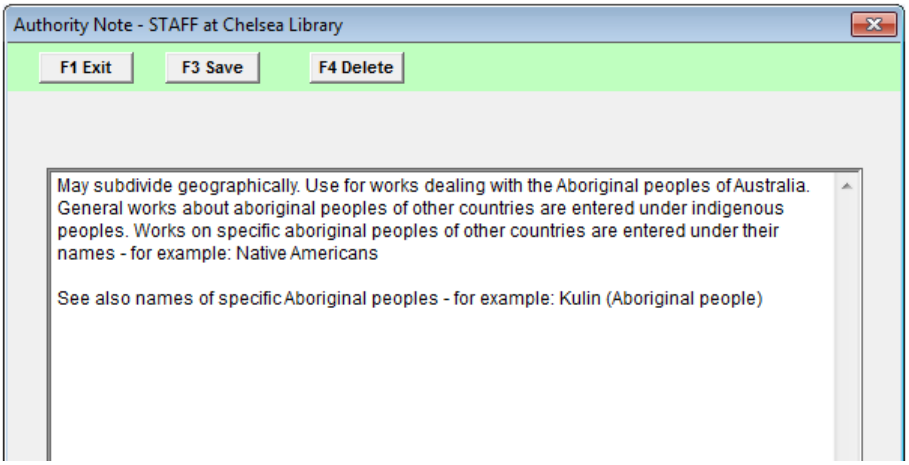
Allows the entry of Scope Notes for Authorities. These notes assist the Cataloguer in the use of the Heading and which Subdivisions are appropriate.

1. Launch the *Amlib* client
2. Go to **Main** > **Authorities** > **Authorities** – the Authorities screen will display

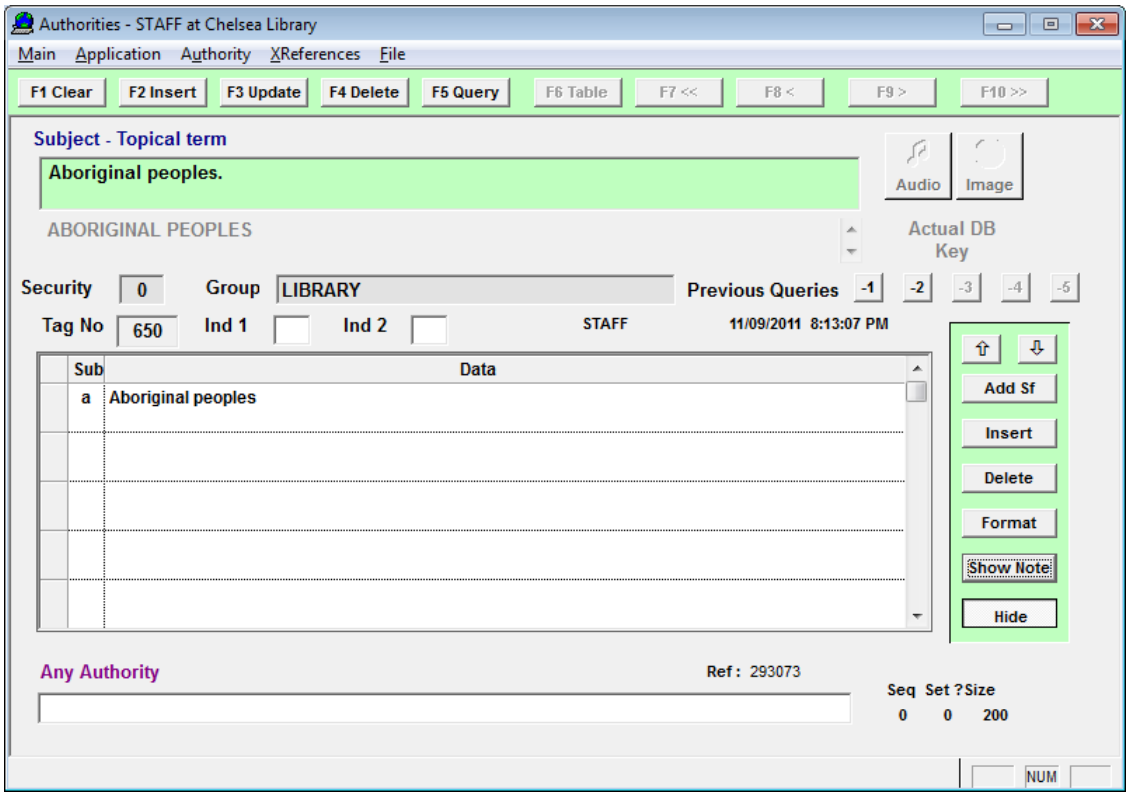
3. Locate a Tag using an **F5 Query** search - for example: **Aboriginal peoples**



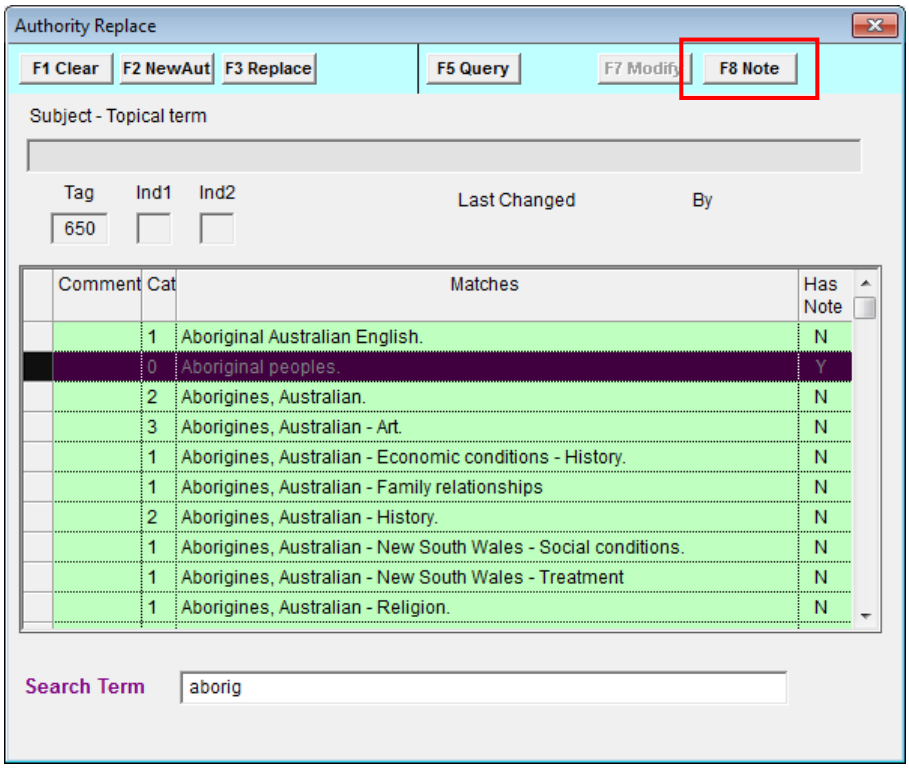
4. Click the **Insert Note** button on the right of the screen – the Authority Note screen will display:



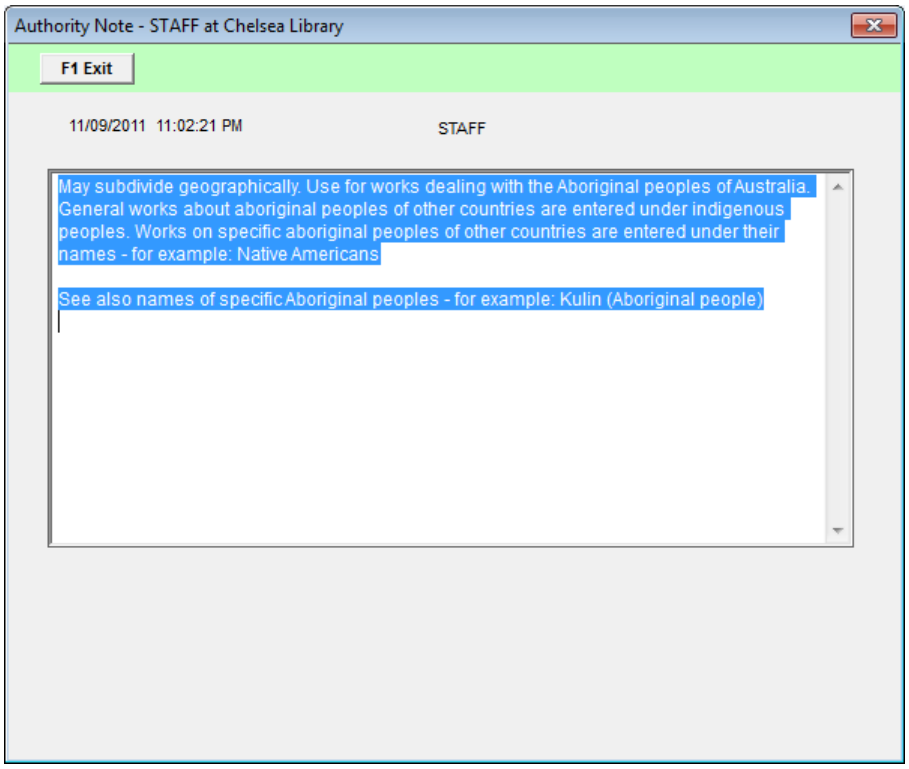
5. Insert a note into the box and click the **F3 Save** button when complete
6. The Authority Note screen will close (the **Insert Note** button will change to be **Show Note** to indicate that there is a Scope Note available)



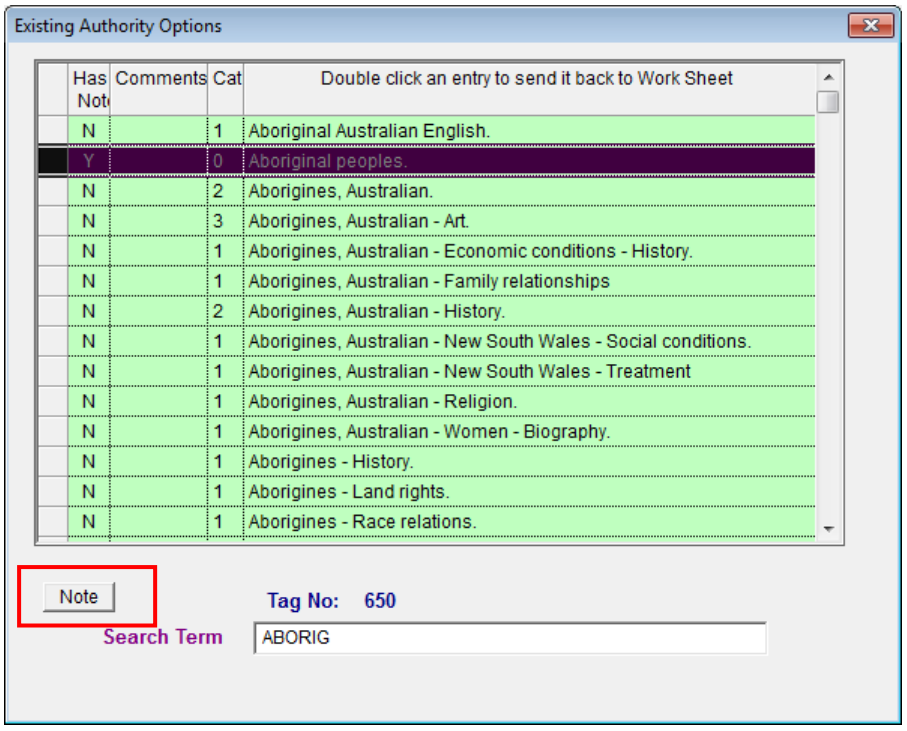
7. The note can be accessed in the *Catalogue* module, when inserting a heading from the Authority Replace screen – if a Scope Note exists, the **F8 Note** button will be active:



8. Highlight the Tag and select the **F8 Note** button – the Authority Note will display:



9. In a Worksheet the Scope Note can also been seen, when checking an Authority from the database (via **F1 Check**) in the Existing Authority Options screen – if it has a Scope Note, the **Note** button will be active:



10. Highlight the Tag and select the **Note** button – the Authority Note will display

SEE AND SEE ALSO REFERENCES

Including cross references can enhance results in searching and provide alternative access points within the catalogue records. These include:

- **See Also** references which direct users from an allowed terms to other related terms (allowed)
- **Use** references which direct the user from a non-allowed term to the authorised (allowed heading)

Libraries can get these XReferences into their database by:

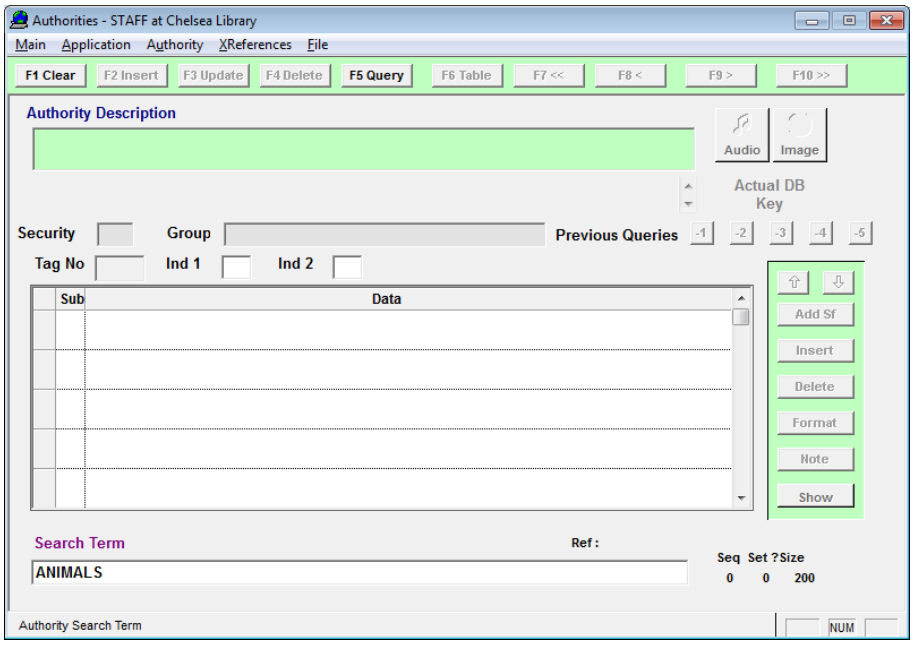
- Importing from an external source – for example: *SCIS*, *Libraries Australia* Authority imports
- Importing from another library
- Manually entering headings as the need arises – for example: checking new Subject Headings and adding *See Also* references if needed

See Also (BT Broader Term, NT Narrower Term, RT Related Term)

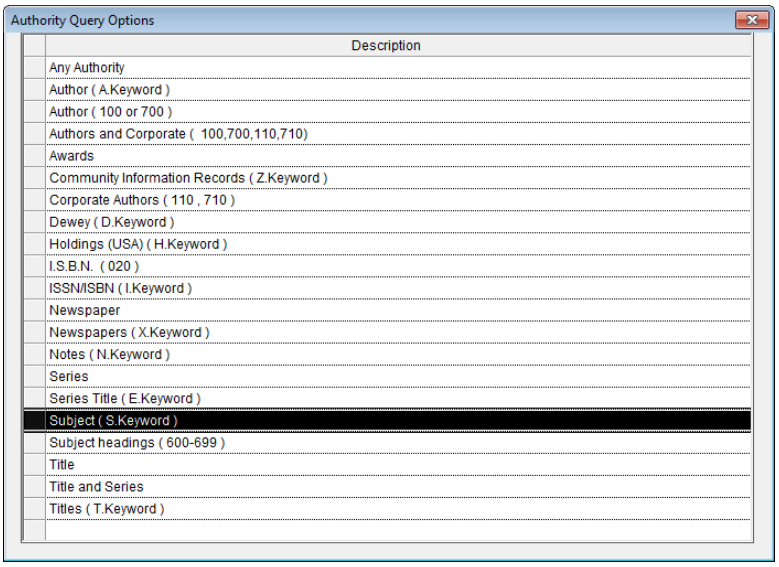
See Also's allow reference to other related headings (from preferred headings to other preferred, related headings).

An Authority can have many *See Also* references.

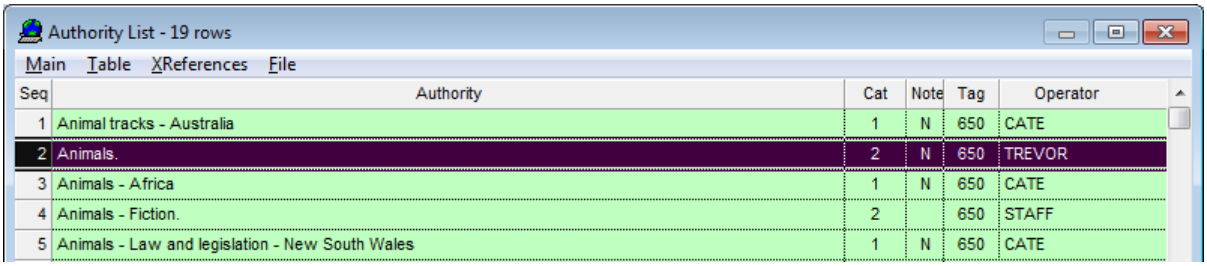
1. Launch the *Amlib* client
2. Go to **Main** > **Authorities** > **Authorities** – the Authorities screen will display:



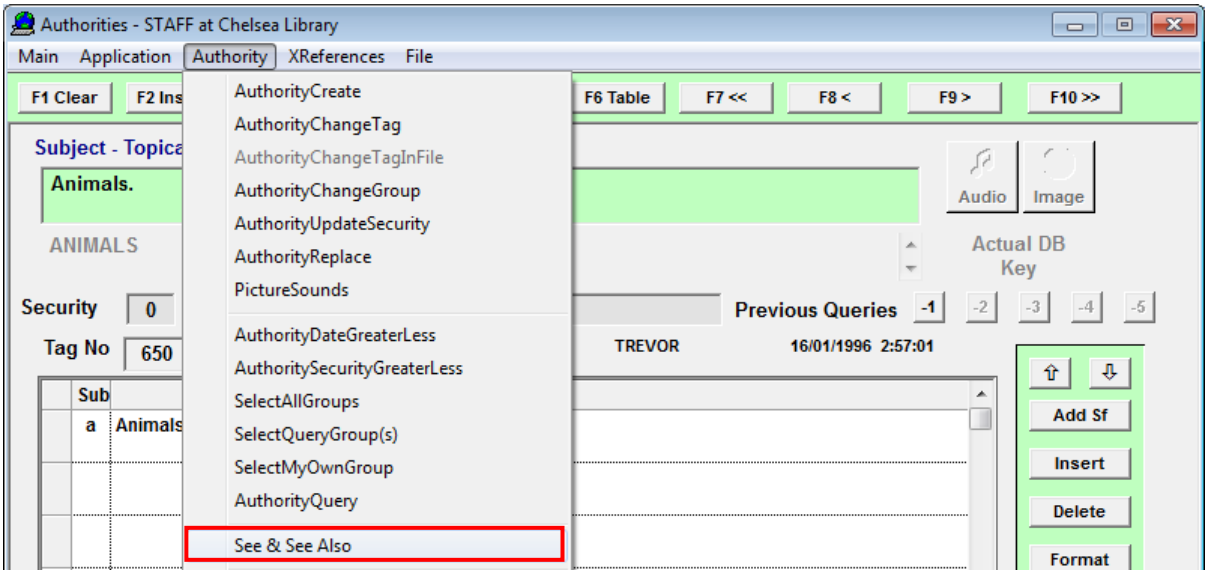
3. In the Search Term box, enter the Authority for which you wish to add See Also cross references (for example: **Animals**) and click the **F5 Query** button – the Authority Query Options table will display:



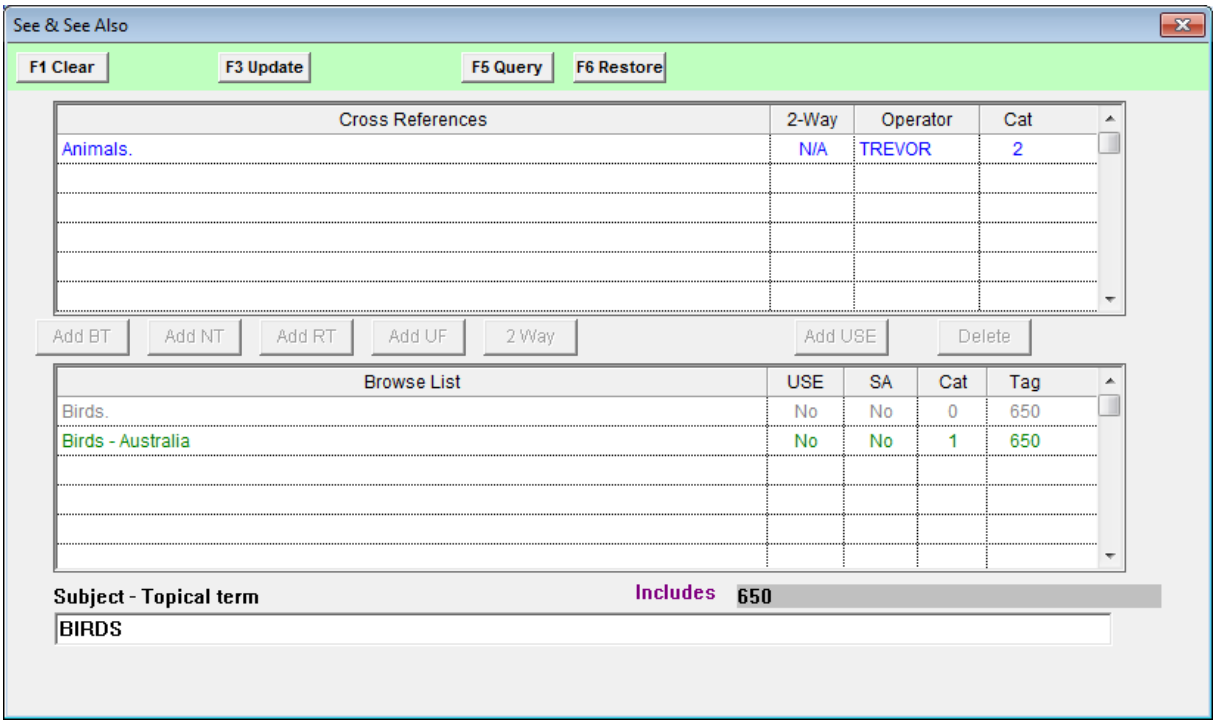
4. Double-click on a type of search, for example: **Subject** heading (if that is what you search term is) – an Authority List of matching Authorities will display:



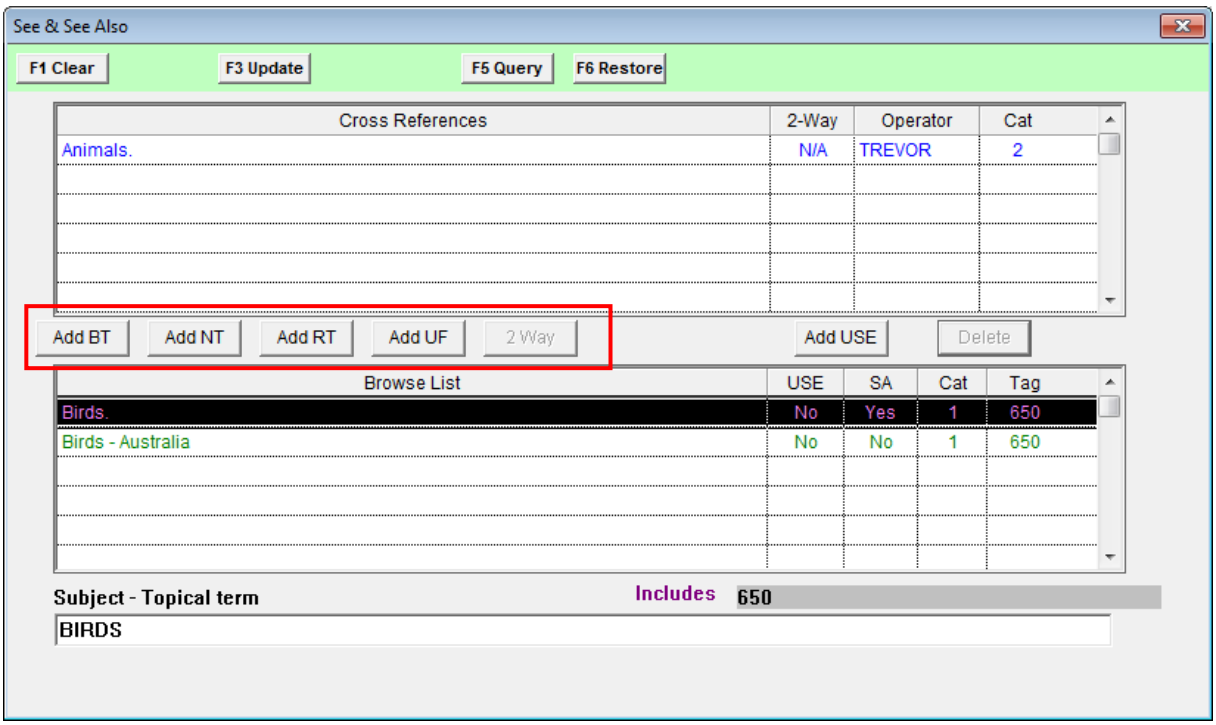
5. Double-click on a selection (for example: **Animals**) – the selected Authority will display on the Authorities screen:



6. From the menu, select **Authority** > **See & See Also** – the See & See Also screen will display
7. In the search box, enter the authority that you wish to set as the *See Also* reference (for example: **Birds**) and **F5 Query** button



8. Highlight the term in the Browse List box that is to be the *See Also* cross reference and select the relevant addition using the table below as a guide

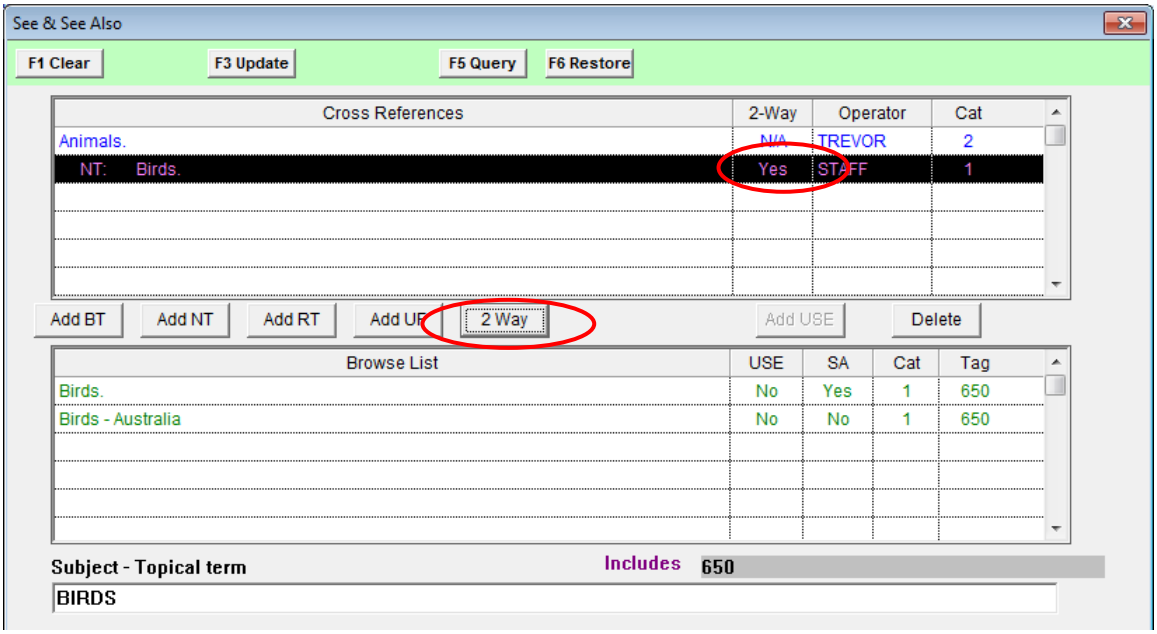


Symbols for Preferred (Allowed) Terms

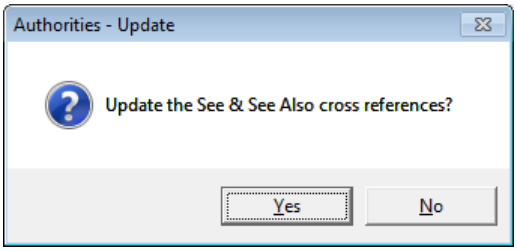
SYMBOL	MEANING	EXPLANATION	EXAMPLE
Add BT	*Broader Term*	Allowed headings which are more general than the term	Fishes **BT Marine Animals**
Add NT	*Narrower Term*	Allowed headings which are more specific than the term	Fishes **NT Seahorses**
Add RT	*Related Term*	Allowed headings which are associated with the term in some way	Fishes **RT Aquariums**
Add UF	*Use For*	Allowed Heading "Seen By" – a Non-Allowed Heading, therefore directing the User to a more appropriate heading	Fishes **UF Fish**

9. Click the **2 Way** button if the term is to be seen from each heading – for example:

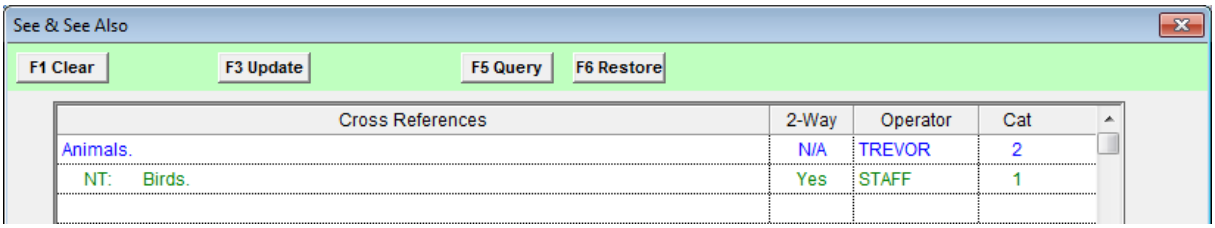
   - **Birds**: *See also* **Animals**
   - **Animals**: *See also* **Birds**



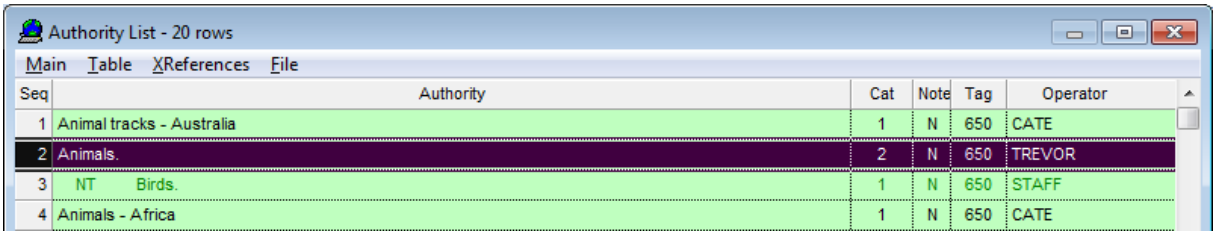
10. When all the *See Also* references have been added, click the **F3 Update** button – an Authorities – Update prompt will display:



11. Click the **Yes** button



12. In the Authority List, the 2-way listing should apply automatically:



See (Use)

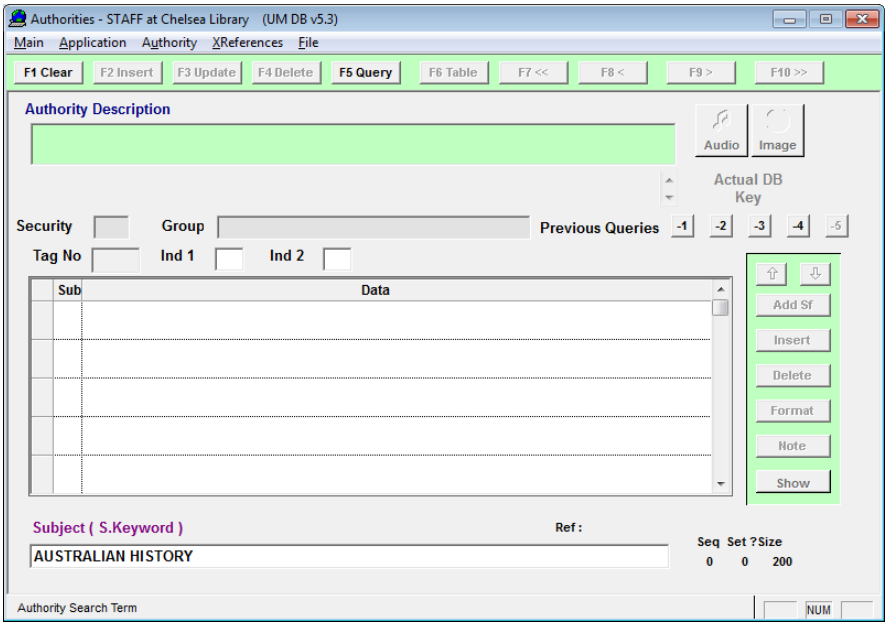
Allows reference from the entered term (a non-preferred heading) to an alternative heading which is preferred. An Authority may only have one See reference.

Symbols for Non-Preferred (Non-Allowed) Terms

SYMBOL	MEANING	EXPLANATION	EXAMPLE
Add USE	*Use*	Non-Allowed Headings have a *See* Reference (USE Reference) to direct the User to an Allowed heading, which is more appropriate	Fish farming **USE Aquaculture**

For example: **Australian History** *SEE* **Australia – History**

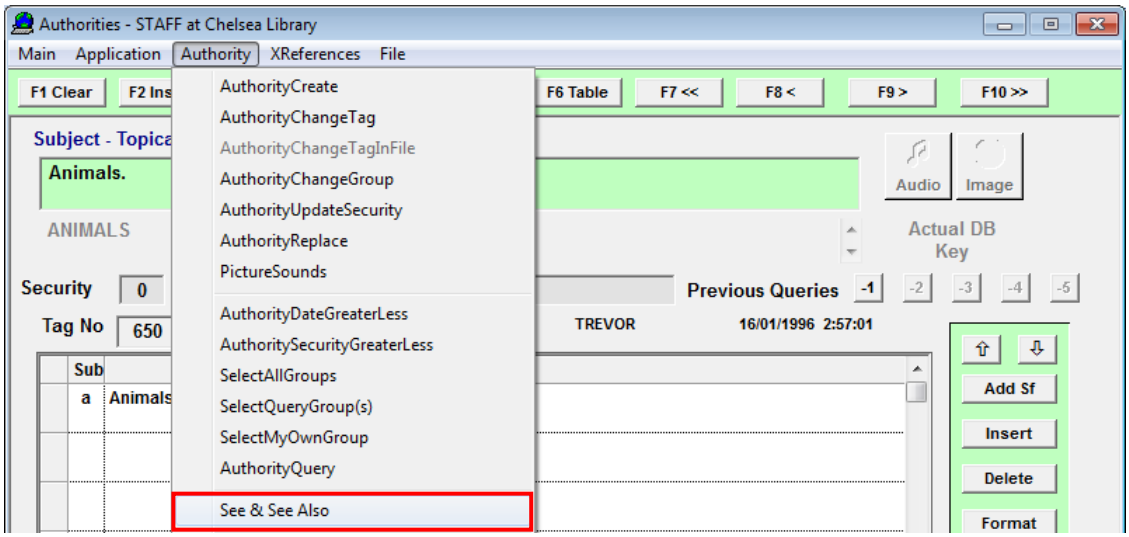
1. Launch the *Amlib* client
2. Go to **Main** > **Authorities** > **Authorities** – the Authorities screen will display:



3. In the Search Term box, enter the non-preferred heading to which you wish to add *See* cross references (for example: **Australian History**) and click the **F5 Query** button

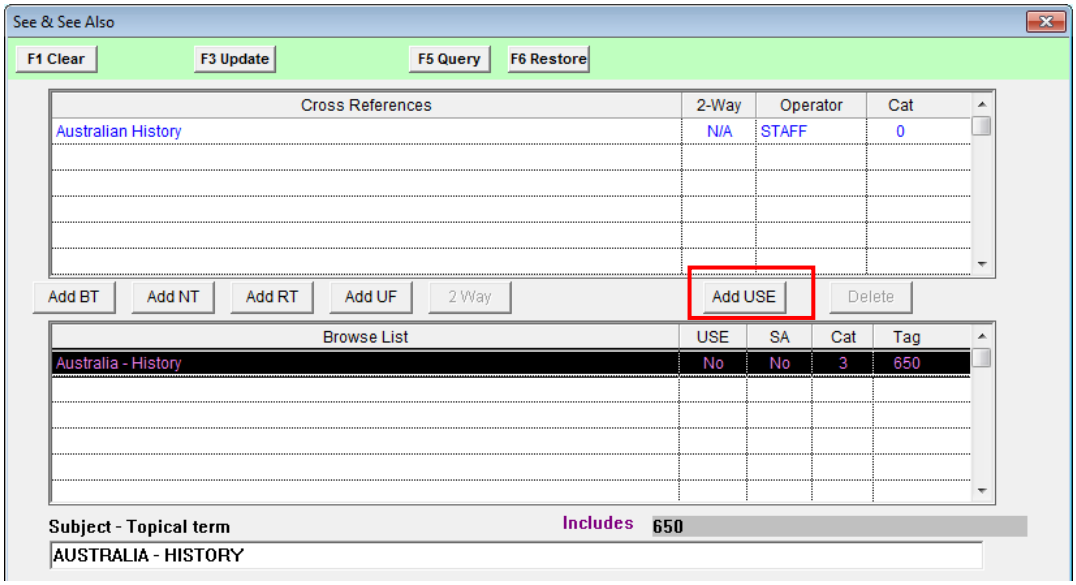
Note: If the **non-preferred heading** does not currently exist is will be necessary to *Create the Heading* first. Go to Authority > Authority Create. Choose the Tag – for example 650 Topical Subject Heading. Enter the term in the Subfields as required. Once complete click **F2 Insert** to insert the Heading. Then proceed as from Point 3.

4. Double-click on a selection in the Authority List (for example: **Animals**) – the selected Authority will display on the Authorities screen

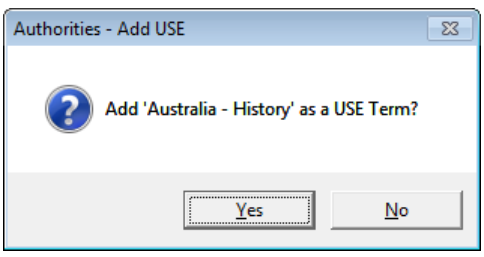


5. From the menu, select **Authority** > **See & See Also** – the See & See Also screen will display

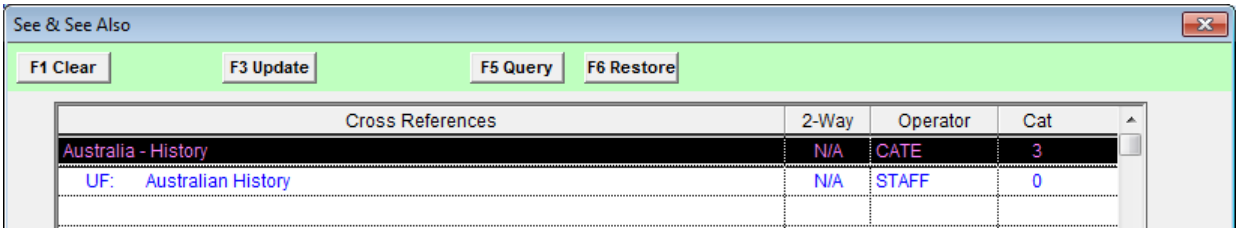
6. In the search box, enter the authority that you wish to set as the *See* reference (for example: **Australia - History**) and **F5 Query** button



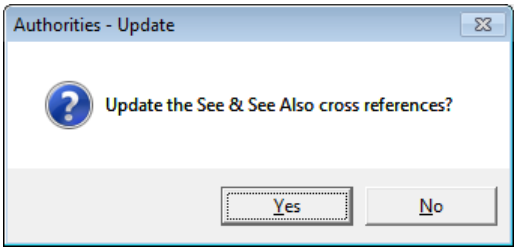
7. Highlight the term in the Browse List box that is to be the *See* cross reference and click the **Add USE** button – the Authorities - Add USE prompt will display:



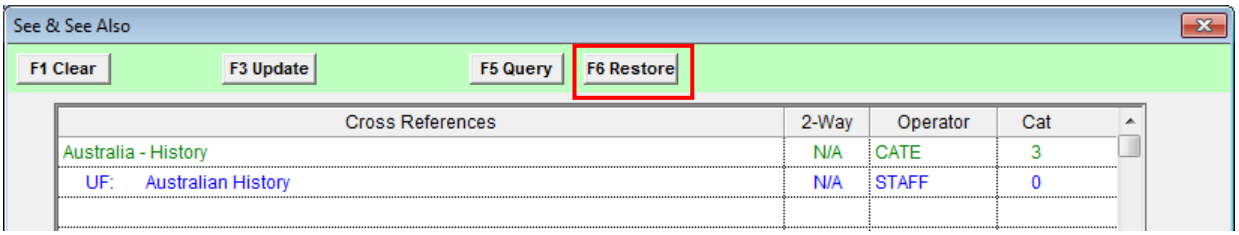
8. Click the **Yes** button



9. Click the **F3 Update** button – an Authorities – Update prompt will display:



10. Click the **Yes** button



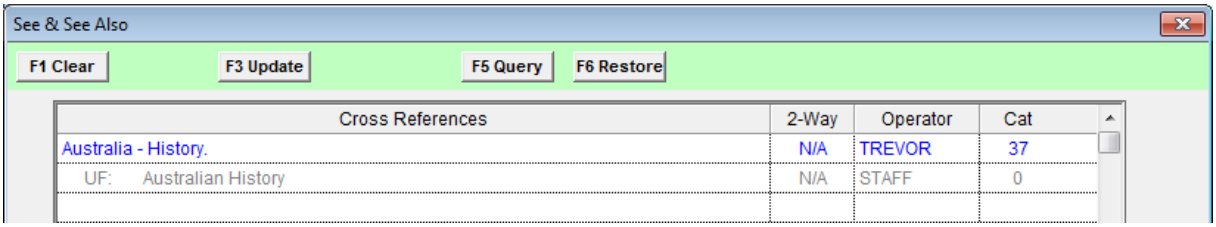
11. If a heading is no longer to be a *See* reference, highlight the term and click the **F6 Restore** button

Seen By (Use For)

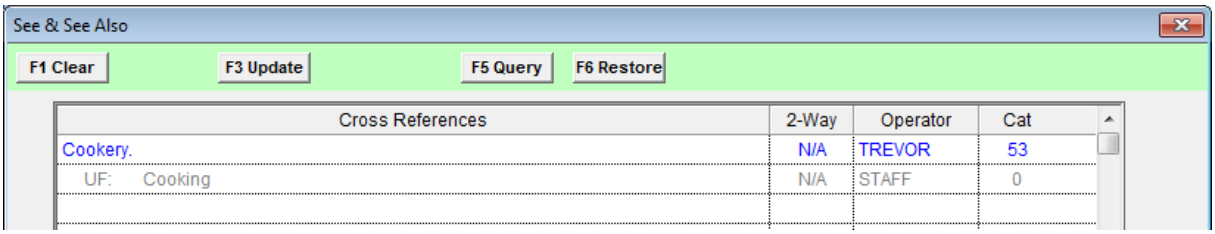
Allows reference from a non-preferred heading to a preferred heading. This would be a one-way match – for example:

- **Australia - History**: *Seen By* **Australian History**

Adding a *See* reference automatically creates this – for example: since we added a *See* reference for **Australian History** to see **Australia – History**, if we search for **Australia – History**, the *Seen By* reference will point to **Australian History**:

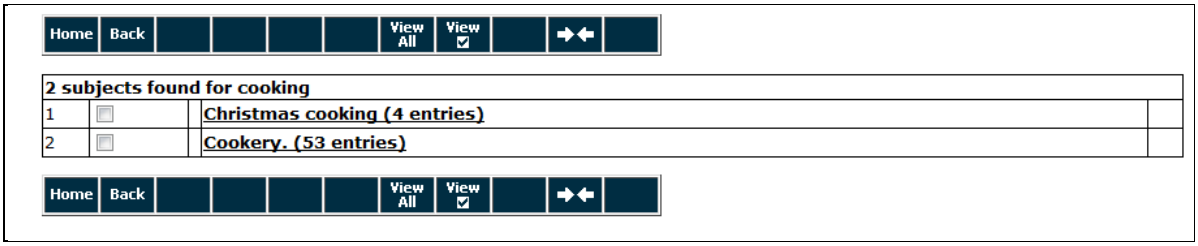


Similarly, you can have **Cookery**: *Seen By* **Cooking**:



This means any attempt to search for **Cooking** in a Catalogue Enquiry will search for **Cookery** instead.

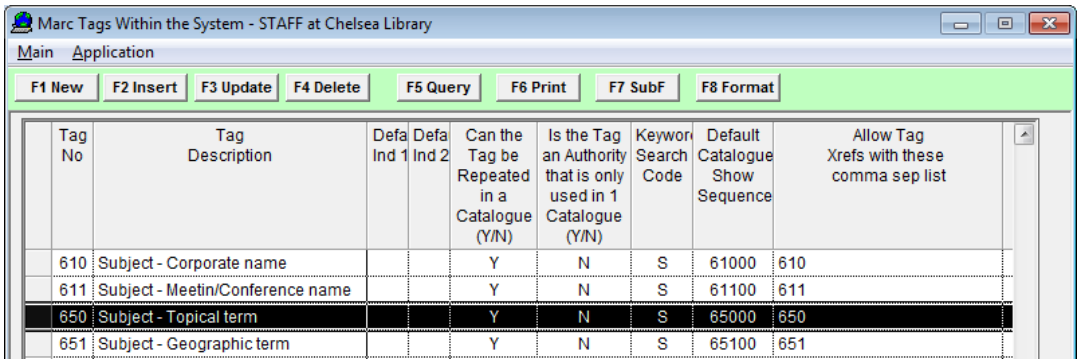
When searching for a commonly used term (for example: **Cooking**) the *NetOpacs* user will be given a result instead of a message that there are no items found for that term:



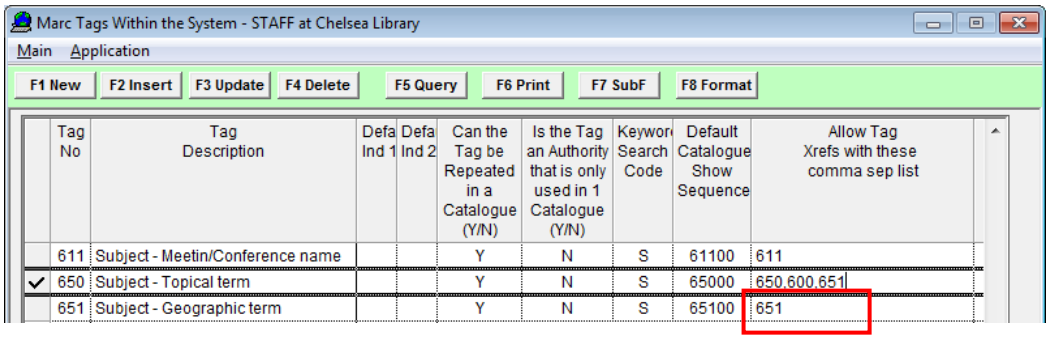
<u>See and See Also References Across MARC Tags</u>

It is also possible to set *See* and *See Also* references across different MARC Tags. For instance, it is possible to set some cross references for countries that are topical headings or people – for example: **Spain**, *see also* **Bullfighters**, *see also* **Queen Isabella 1**.

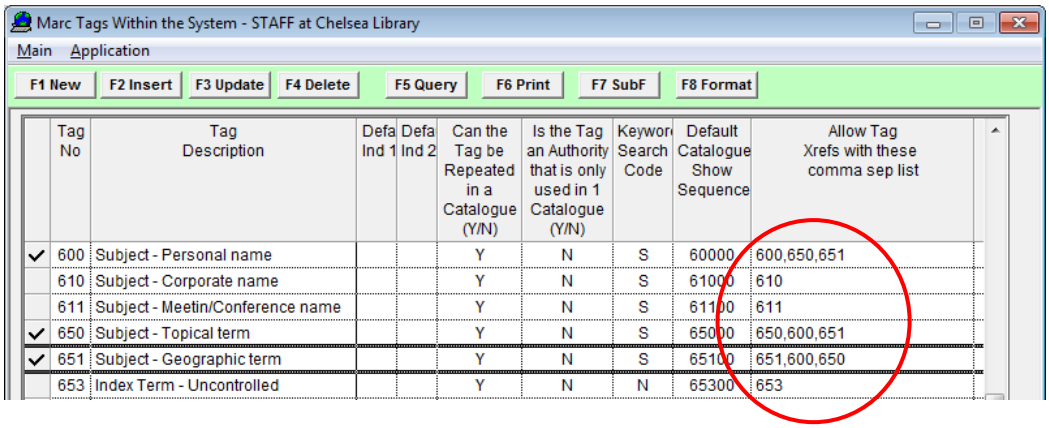
1. Launch the *Amlib* client
2. Go to **Main** > **Authorities** > **Marc Tags** – the <u>Marc Tags Within the System</u> screen will display:



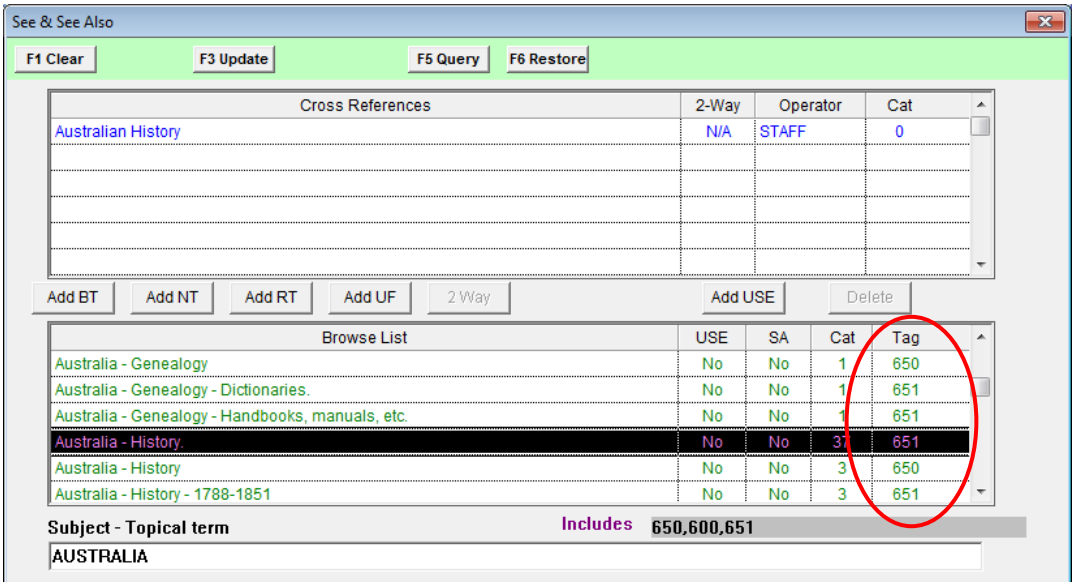
3. Locate the Tag you wish to include in the cross referencing – for example: **650**
4. Add a comma (**,**) in the <u>Allow Tag Xrefs with these comma sep list</u> column and the next Tag number, repeating for multiple Tags – for example: to search through **Subject – Topical Term**, **Subject - Personal Name**, **Subject – Geographic Term**, the search phrase would be: **650,600,651**



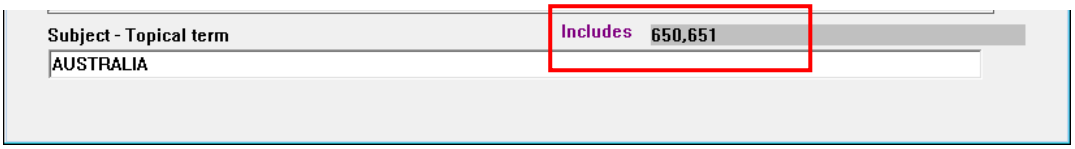
5. Repeat for the reciprocal Tags – for example: **600**, **651**:



6. Click the **F3 Update** button when complete
7. You are then able to select against a range of Tags in the <u>See & See Also</u> screen as a result:



8. It is also possible to manually search across Tags, by entering additional Tag numbers after the Tag(s) displayed in the Includes box, separating them with a comma (**;**), at the bottom of the <u>See & See Also</u> screen:



Amlib allows importing (take-up) of catalogue and authority data from a file either on the server machine or your local PC supplied by cataloguing services that use USMARC catalogue data.

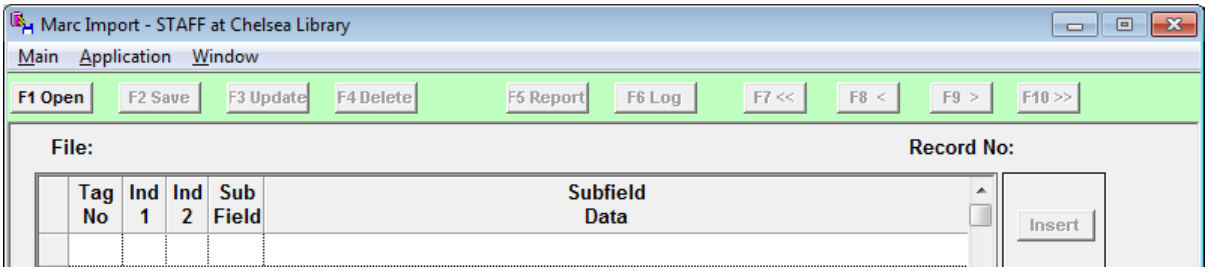
Currently data formats can be handled include:

- Output from ABN (Kinetica)
- Output from Library Information Services of WA in the form of Exchanges (*SL of WA*)
- Output intended for Unix or PC libraries
- Output intended for Mainframe libraries
- Output from *SL of WA* in the form of orders
- Output from Schools Catalogue SCIS
- Output in the form of USMarc Authority *See* and *See Also* references

Please Note: The Marc load process only uses the Tags and Subfields defined within the system. Other data loaded from external bodies may have a number of Tags that you may or may not wish to capture. Checking the Logs is a way of ensuring the Marc Tags required are being loaded

Accessing the Data for the Download

1. Launch the *Amlib* client
2. Go to **Main** > **Authorities** > **MarcTakeUp** (alternatively use **Ctrl + M**) – the Marc Import screen will display:



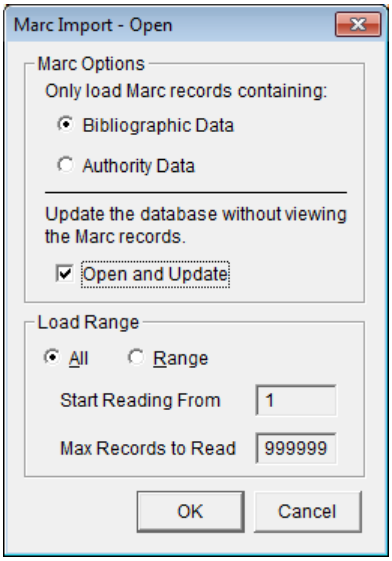
3. Click the **F1 Open** button to display the Open dialogue box
4. Locate the file to be processed by using the Look in: drop-down box – for example: if the file is on the C: drive, the Look in: box may say **Local Disk (C:)**
5. Once the file name has been located, use your mouse to select it and click on the **Open** button

There are two processing options: Bibliographic Data or Authority Data – this guide covers the import of Bibliographic Data.

Bibliographic Data

This option is to load records which are Bibliographic Data in machine readable format which can be imported into *Catalogue*, *Authority* and *Stockitem* (where appropriate) applications of *Amlib*.

1. The Marc Import – Open screen will display:



Please Note: If the Import file (*Bibliographic* or *Authority*) contains more than 9999 records, it is recommended that Open and Update is selected (ticked) so that all records can be loaded into the database. This eliminates the need to load in sections. The maximum records that can be viewed in the Holding file is 9999 records.

HEADING	FIELD	EXPLANATION/OPTIONS	EXAMPLE
Marc Options	**Bibliographic Data**	Bibliographic data to be created for the Catalogue.	Data from external source (for example: *SCIS*, *SLOWA*, *Kinetica* etc. with USMARC Tags)
	Authority Data	Authority data for creation or updating of Authority Headings and/or cross references.	**See** and **See Also** Update from SCIS or other source
Update the database without viewing the Marc records	**Open and Update**	If checked (**ticked**), the imported items will not display in the Holding file.	The *Catalogue* will be **Update**d immediately
		If unchecked (**unticked**), the imported items will display in the Holding file.	Review records The *Catalogue* will not be updated until the **F3 Update** button is selected
Load Range	**All**	All records from the file are downloaded into a holding file.	**All**
	Range	Selected records from the file are downloaded into a holding file. If Range is selected, the next 2 fields have to be updated.	For example, 1 to 50

2. Complete the options using the above table:

a. Marc Options = **Bibliographic Data**

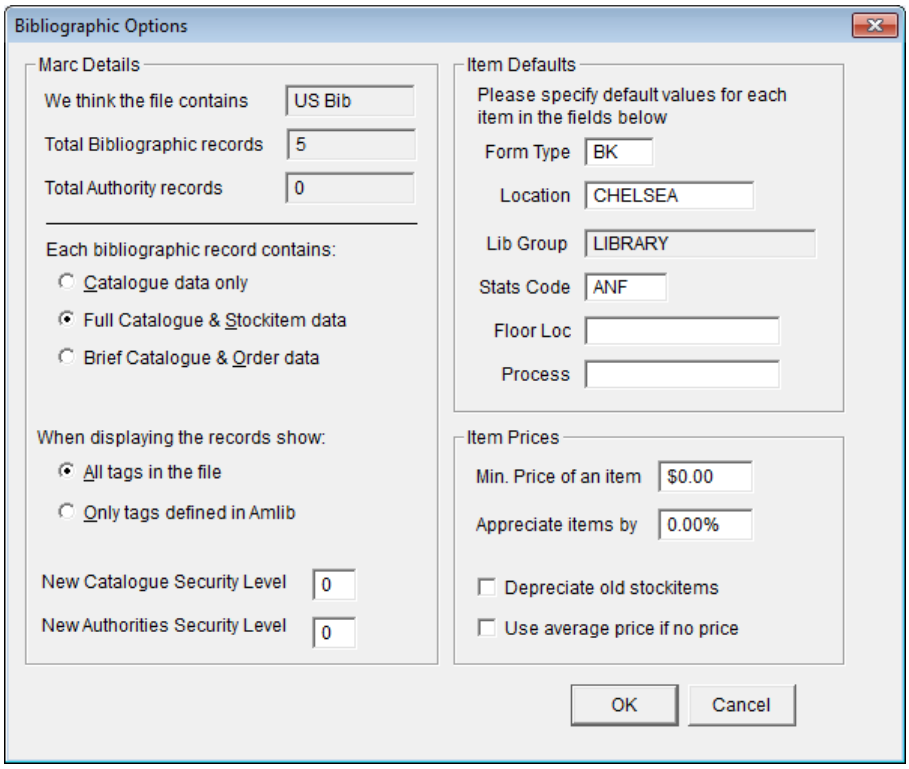
b. Open and Update = **ticked**, unless you want to review each individual MARC record

c. Load Range = **All** (unless the file sizes are quite large)

3. Click on the **OK** button

Bibliographic Options

1. The Bibliographic Options screen will display:



HEADING	FIELD	EXPLANATION/OPTIONS	EXAMPLE
Marc Details	**We think the file contains**	The data type is displayed Standard format	**SCIS** **ABN**
	Total Bibliographic records	The number of Bibliographic records will display	**32**
	Total Authority records (this will only display if the import is for Authority headings)	The number of Authority headings with See/See Also references will display	**0**

2. Select the appropriate Each bibliographic record contains setting:

Each Bibliographic record contains:	**Catalogue data only**	The system will determine the contents of the import file. If only Catalogue data exists in the file, this will be the Default option.	**SCIS Data**
	Full Catalogue & Stockitem data	The system will determine the contents of the import file. If both Catalogue and Stockitem data exists in the file, this will be the Default option. **Please Note:** This item can be selected to create "Dummy" Stockitems even though only Catalogue data exists in the Import file.	**SL OF WA Data**
	Brief Catalogue and Order data	The system will determine the contents of the import file. If only brief Catalogue data and Order data exists in the file, this will be the default option.	**AOL Data**
When displaying the records show:	**All tags in the file**	All Tags from the Import file will display in the Holding file for viewing. However, Tags not defined in *Amlib* will not load into the Amlib Catalogue unless the Marc Tag is defined.	If Tag: **650v** is not used in *Amlib* it WILL still display in the Holding file.
	Only tags defined in Amlib	Only Tags used in *Amlib* will display in the Holding file.	If Tag: **650v** is not used in *Amlib* it will NOT display in the Holding file.

3. If the Marc Details are set to import **Full Catalogue & Stockitem data**, the Item Default and Item Prices sections will also display:

HEADING	FIELD	EXPLANATION/OPTIONS	EXAMPLE
Item Defaults **Please specify default values for each item in the fields below**	**Form**	The default values set in the **Main** > **Supervisor** > **Installation** > **Stockitem** tab will display if defined. If these fields are not yet defined, codes which will apply to the items can be entered. Rules for automatic entries of Form and Stats codes depending on the Tags that are imported, and be set in Cat Defs in the Stockitem Form and Stats codes.	If during the Import, Cat definitions cannot be created, each Stockitem will have a default Form of **BK** (for example)
	Location		**CHELSEA**
	Lib Group		**LIBRARY**
	Stats Code		**ANF**
	Floor Loc (optional)		**DISPLAY**
	Process (optional)		**IN PROCESS**

Item Prices	**Minimum price of an item**	If the item price in the Import file is less than the price set here, enter the Minimum price	The Import price is **$8.00** but the Minimum price set here is **$10.00**, the price in the Stockitem will be **$10.00**
	Appreciate items by %	Items can be appreciated by a percentage – for example: GST of 10%	**10%**
	Depreciate old stockitems	Items to be depreciated will be dependent on the table set in **Stockitem** > **Application** > **Stats Group**	
	Use average prices if no price	Items will be given an average price, set in **Stockitem** > **Application** > **Stats Group**. If no price is entered in the Import File	

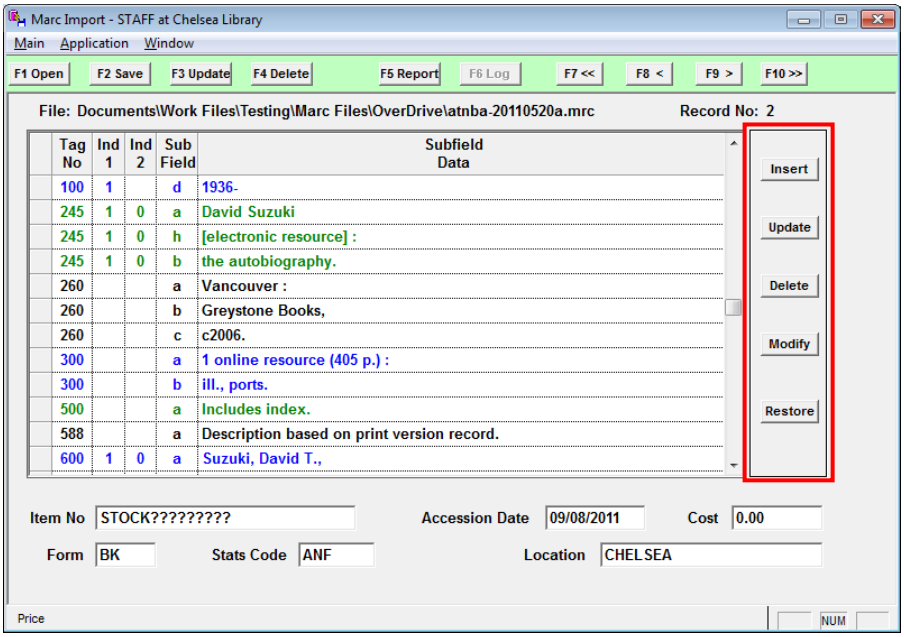
4. Click the **OK** button once you have completed modifying your settings

Please Note: Form and Stats Code defaults from the **Main** > **Supervisor** > **Installation** > **Stockitem** tab display automatically in the fields. If there are no defaults entered, the field will be blank. Location displays as the Login Location. Entry of these fields is optional. As the import of data is processed, the Stockitems will be given the default values if there are no catalogue definitions for the Form or Stats codes of the items. Form and Stats Code Cat definitions are found in **Main** > **StockItems** > **StockitemForms** or **StockitemStatsCodes** table for the particular code.

Reviewing Records to be Imported (Optional)

It is possible for the importer to review (and edit) the MARC data being imported.

1. If the importer has decided to review the records being imported (see Bibliographic Data step above), the Marc Import screen will display:



2. If you do wish to edit the data (prior to import), use the editing buttons on the right to change or delete the individual Tags

   Please Note: Editing of the data prior to import is not essential. Changes can be made after the data has been imported into the Catalogue. Remember that not all the Tags will

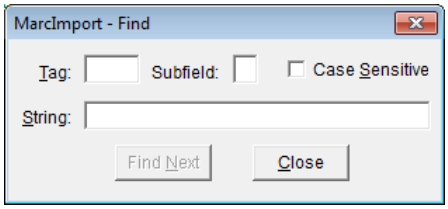
necessarily be Imported, so if editing is considered necessary, change only the Tags you know will be imported!

3. Use the **F7**, **F8**, **F9** and **F10** buttons to move between records
4. Once the data has been reviewed, click the **F3 Update** button

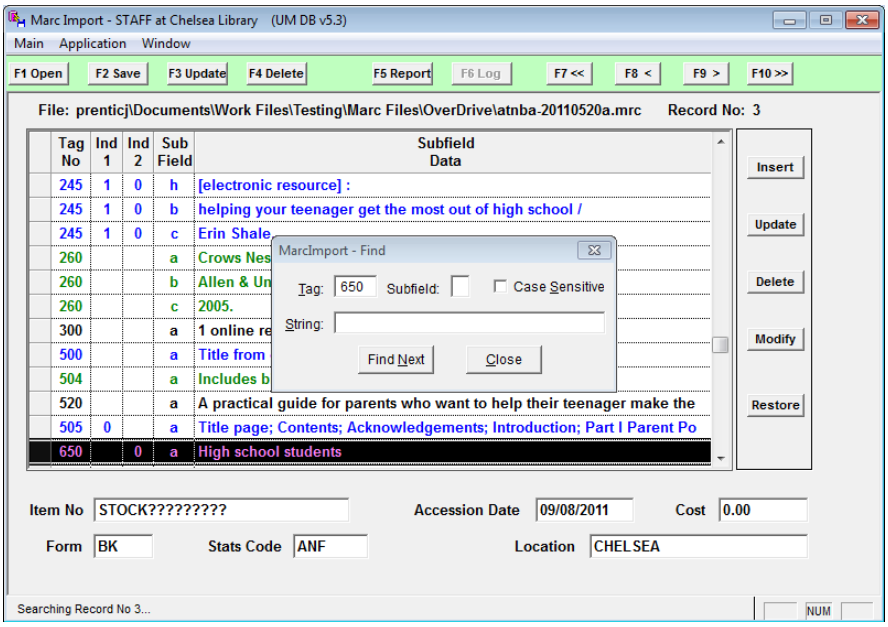
Find

It is possible to use the find function to locate any matching text, Tag number or specific Subfield in the Holding File data being displayed. For example: use this facility to check all Author entries or Subject headings.

1. From the main menu, select **Window** > **Find** – the MarcImport - Find screen will display:



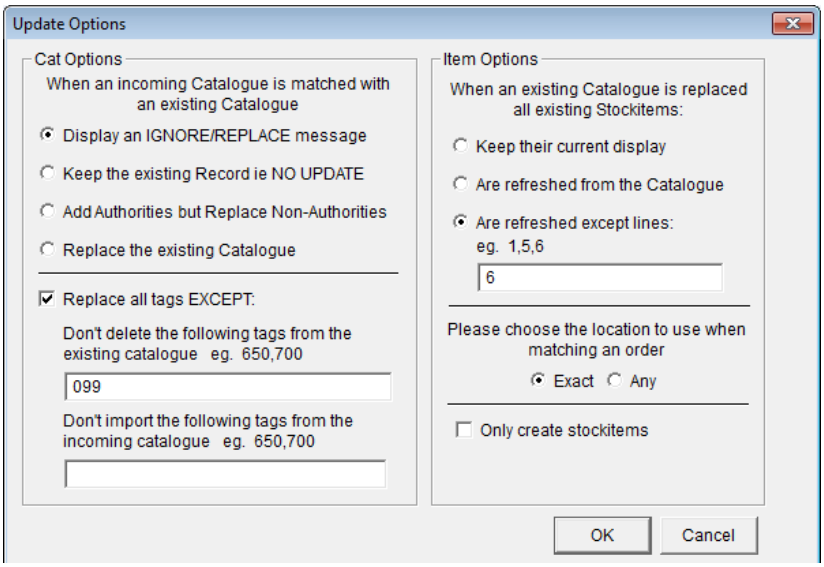
2. Type in the Tag, Subfield or String to find and click the **Find Next** button
3. It will then find any matching data in the record currently being displayed:



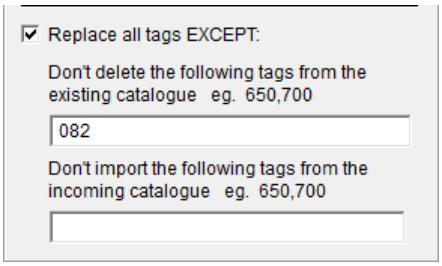
Catalogue Update Options

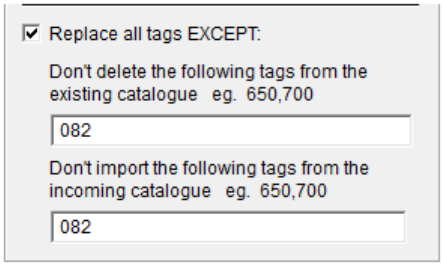
1. The Update Options screen will then display, allowing you to select the **Cat**(alogue) and (Stock)**Item Options**:

    - Cat Options: When an incoming Catalogue is match with an existing Catalogue
    - Item Options: When an existing Catalogue is replaced all existing items



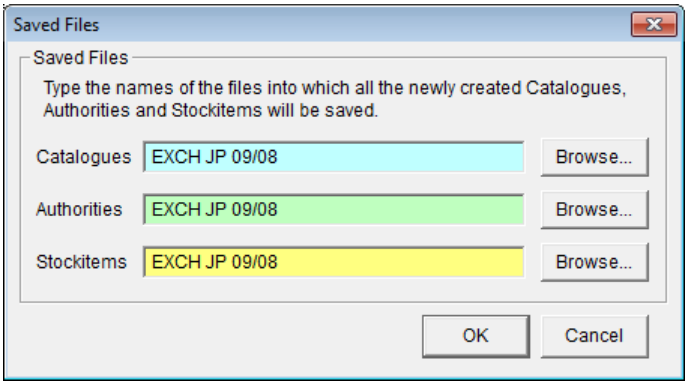
2. When the data has been checked, click the **F3 Update** button to include these items in the database

HEADING	FIELD		EXPLANATION
Cat Options **When an incoming Catalogue is matched with an existing Catalogue:**	**Display an IGNORE/REPLACE message**		A message will display at each match occurs. At each match, the operator will get a choice to create a new catalog, replace the existing or to keep the existing details.
	Keep the existing Record ie NO UPDATE		No Update occurs for the Catalogue
	Add Authorities but Replace Non-Authorities		Does not replace existing Authorities but adds new Authorities to the record. However, it replaces any Non Authority data from the Import
	Replace the existing Catalogue ENTIRELY		All Tags from the Import are used, overwriting any existing data
	FIELD	**OPTION**	**EXPLANATION**
	Replace all tags EXCEPT:	**Don't delete the following tags from the existing catalogue eg. 650,700**	This will vary according to the setting in **Main** > **Supervisor** > **Installation** > **Catalogue** tab: • MARCImport Replace: don't delete these Tags from the existing cat • MARCImport Replace: don't import these Tags from the existing cat Adds non-identical Tags when importing all but specified Tags. Existing data in the specified Tags remains unchanged 

		Don't import the following tags from the incoming catalogue eg. 650,700	Adds non-identical Tags when importing. Does NOT import the new data in the specified Tags. Existing data in the specified Tags remains unchanged 

HEADING	FIELD	OPTION	EXPLANATION
Item Options **When an existing Catalogue is replaced, all existing Stockitems:**	**Keep their current display**		No existing Stockitems are refreshed – they remain the same
	Are refreshed from the Catalogue		All existing Stockitems are replaced by the new Catalogue details
	Are refreshed except lines: eg. 1,5,6		Enter the line numbers to be retained – for example: **6** (Line 6, which is usually Call Number). Line numbers correspond to the 6 lines of Stockitem display (for example: Line 1 is usually Title, Line 2 Author etc.)
	FIELD	**OPTION**	**EXPLANATION**
	Please choose the location to use when matching an order	**Exact**	Only order items where location is the same as the current Amlib location will be candidates for replacement
		Any	Stockitems on the file may replace any order item on the database
	Only create stockitems	**Checked**	The import of data will result in **no** Catalogue records being created. Only Stockitems will be created.
		Unchecked (Default)	Create Catalogue records as well as Stockitems

3. Enter the options you would like, then click the **OK** button – the Saved Files screen will display:

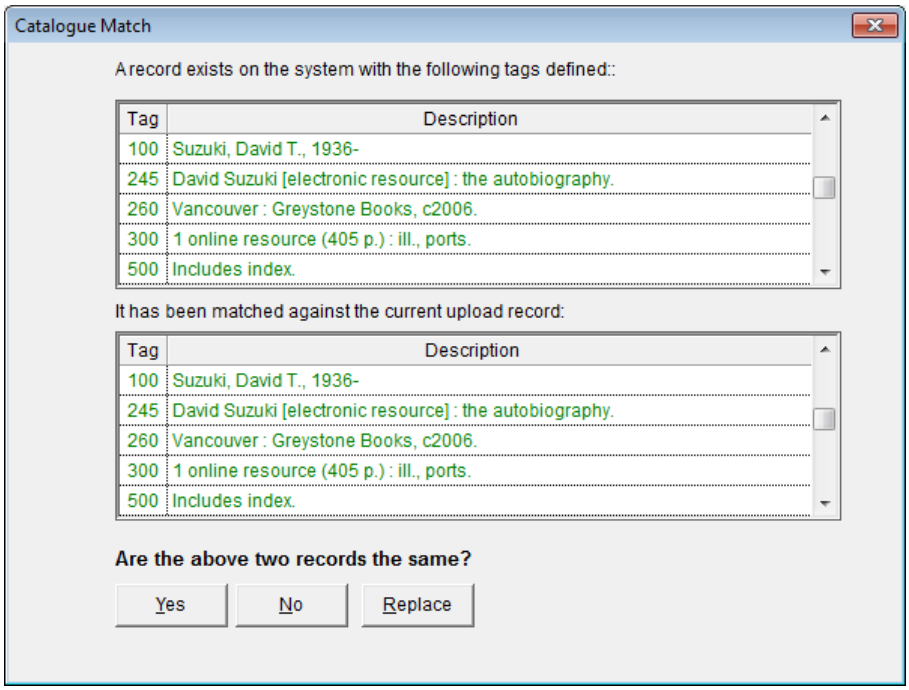


4. Type the names of the files into which all the newly created **Catalogues**, **Authorities** and/or **Stockitems** will be saved (if you do not want to check new items – for example: **Authorities**, do not enter a filename)

5. Click the **OK** button

HINT: These files assist in finding the newly created Catalogues, Authorities and/or Stockitems after the import. The Filenames are created so that you can identify the file later. A suggested Filename could be the type of data – for example: **SCIS** or **EXCHANGE**, the date and the initials of the staff member processing the data.

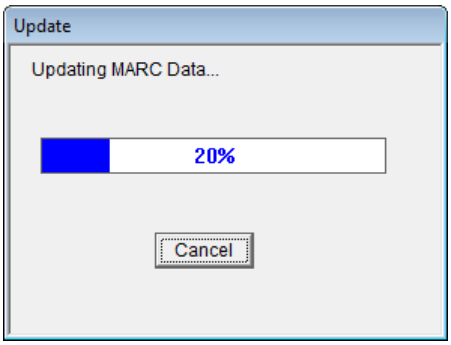
6. If confirmation of duplicate items has been requested in the parameters, a Catalogue Match screen will display every time a duplicate item is found:



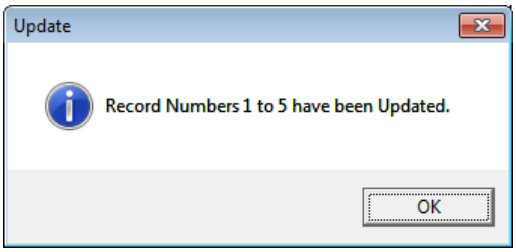
7. **Are the above two records the same?** Click the **Yes**, **No** or **Replace** button

OPTION	EXPLANATION
Yes	The catalogue entry that exists on the database will remain as displayed in the top box. A new Stockitem would need to be added if appropriate. The imported record will not be included in the New File created for Catalogue or Authorities
No	A new catalogue will be created with the data from the Imported data being used for the new catalogue record. The imported record will be included in the New File created for Catalogues or Authorities
Replace	The existing catalogue entry will remain but the data will be replaced with the data from the imported recorded. The imported record will not be included in the New File created for Catalogue but there may be some additions to the Authorities file

8. An Update prompt will display, indicating the progress of the import:



9. When the update is finished an Update prompt will display, showing the number of records Updated: **Record Numbers X to X have been Updated.**



10. Click the **OK** button
11. You will be able to view the log by selecting the **F6 Log** button

F6 Marc Log

This log lists any errors that were experienced in the process of importing the file and also what action was taken with certain items. Most of the errors that display in the log are caused by the Tag numbers not being defined on the Amlib database. This may be because we did not wish to use them in the Catalogue data but were present in the data file.

Authority Data

This option is to load records which are Authority data in machine readable format which can be imported into the Authority application of *Amlib*, adding Authority *See* and *See Also* cross references as set by the options when importing – for example: Schools can access the Authority files supplied by *SCIS*.

- See: Appendix 1: Loading Authority Data for more information

If the data contains machine readable Authority data to update *See* and *See Also* references, this will be selected automatically as the default.

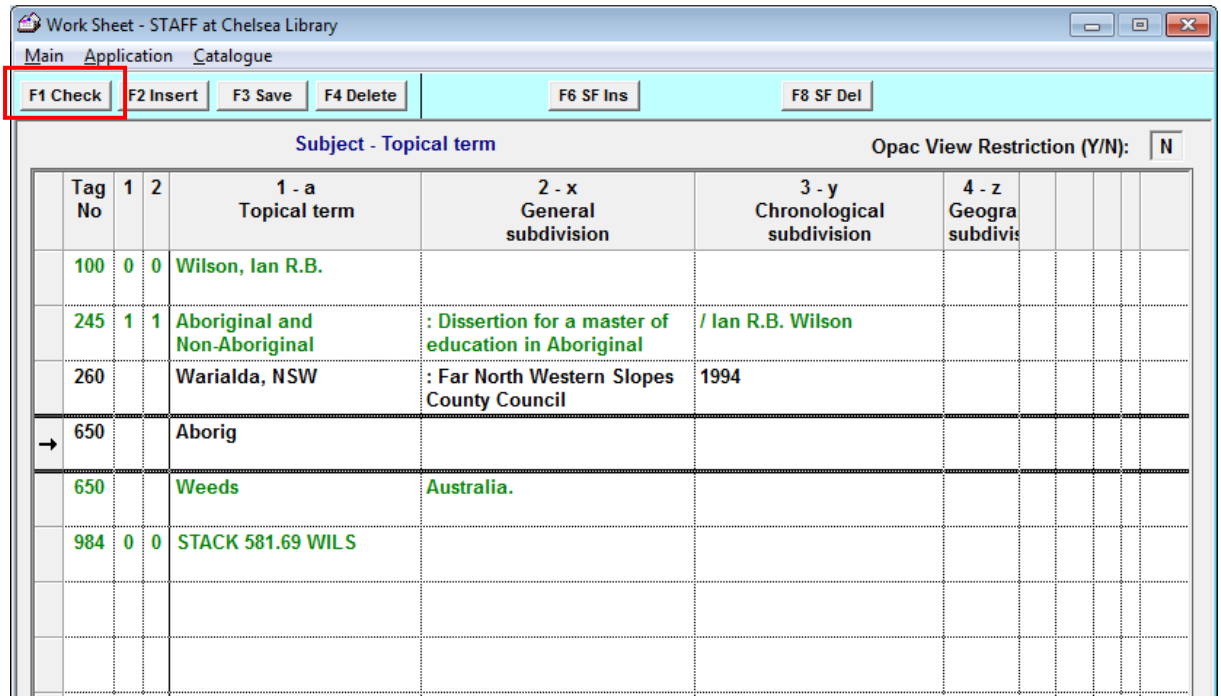
Open and Update is recommended for larger files (most Authority files are large)

To maintain consistency in the entry of headings in your database, it is worthwhile checking existing headings on your database. This is "local authority control". This allows the cataloguer to view lists of Subject Headings or Authors, etc. to reuse the terms already entered. When entering bibliographic data in the Catalog screen, the *Authorities* module records are checked.

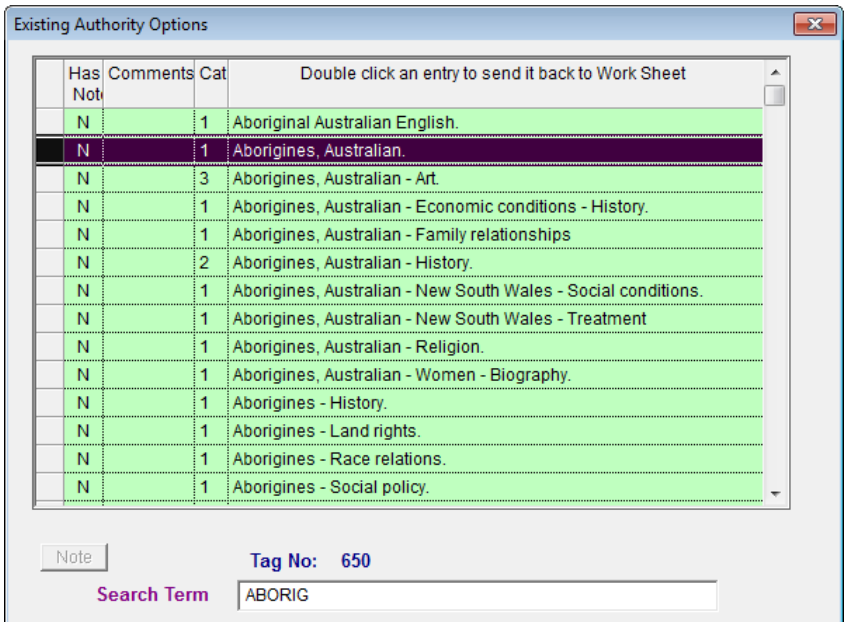
Catalogue Worksheet

1. Launch the *Amlib* client
2. Go to **Main** > **Catalogue** >**Catalogue** – the Catalog screen will display
3. Create a new record:
    a. From the menu, select **Catalogue** > **Catalog Create**
    b. Select a Template style by clicking on the appropriate button
4. Edit an existing catalogue record:
    a. Search for a record using the **F5 Query** button
    b. From the menu, select **Catalogue** > **Catalog Modify using Worksheet**
5. The Worksheet screen will display
6. When entering Authority headings (for example: **650 | Subject – Topical Term** headings), type in a few letters and check them by clicking the **F1 Check** button (it also possible to check by double-clicking on a line)

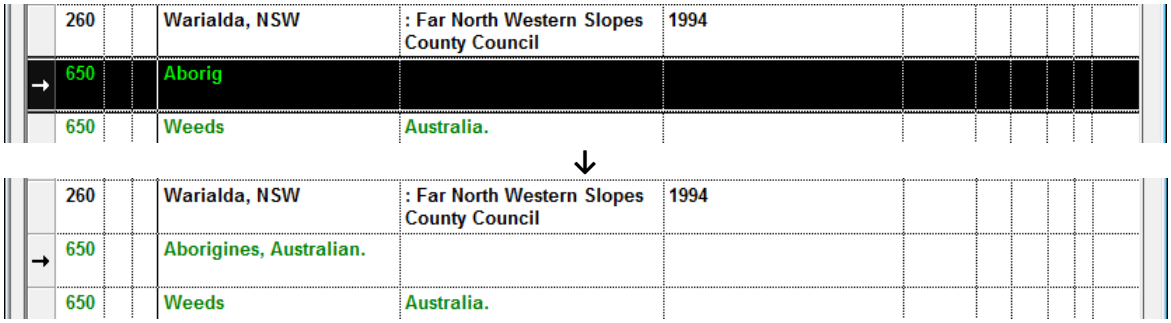
    Please Note: If the **F1 Check** button is not available, it can be set from **Main** > **Supervisor** > **UserNames**.



7. The Existing Authority Options screen will display:



1. To select an Authority in the table, simply double-click on it: the contents of the Tag being checked will then change to match the selected Authority (the text will also change colour from black to **green**)



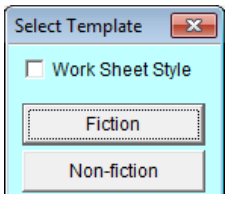
2. Once selected (or if there is no matching Authority), click on the red **[X]** to close the selection table (if there were no Authorities found the contents of the Tag being checked will turn **red**, if there were Authorities found but none were selected the contents will turn **pink**)
3. Click the **F3 Save** button when complete

Please Note: Scope Notes can be viewed if available.

Lead Thru (Non-Worksheet)

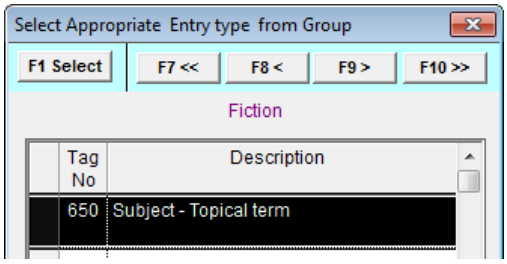
In the Lead Thru (non-Worksheet) method, the Authority is searched as follows:

1. In the Catalog menu, select **Catalogue** > **Catalog Create** – the Select template prompt will display:

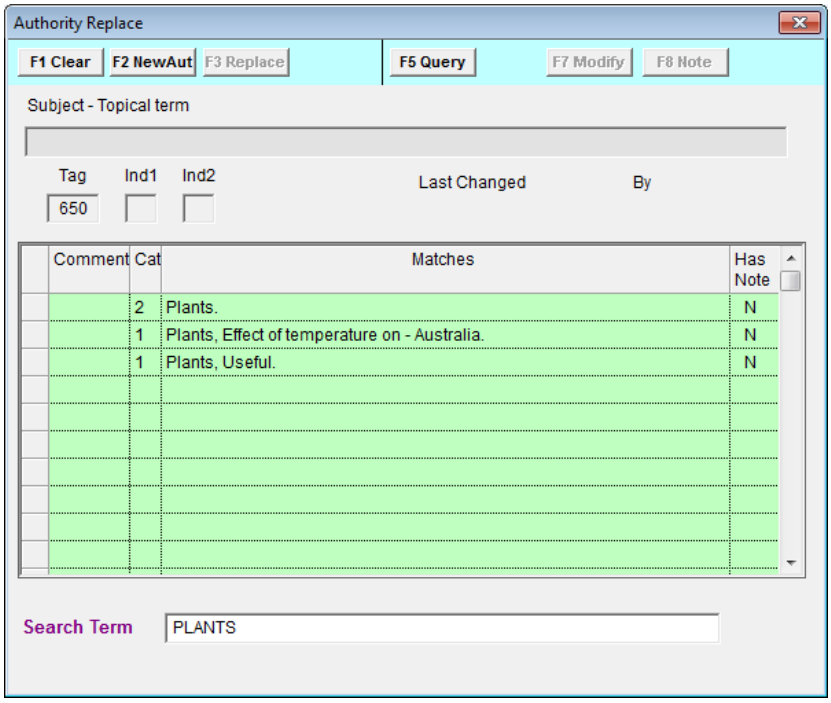


2. **Untick** the Work Sheet Style option
3. Select a Template style by clicking on the appropriate button

4. An appropriate Marc Tag is selected from the Lead Thru set by clicking the **F1 Select** button – in this example, we selected the **650 | Subject – Topical Term** Tag:

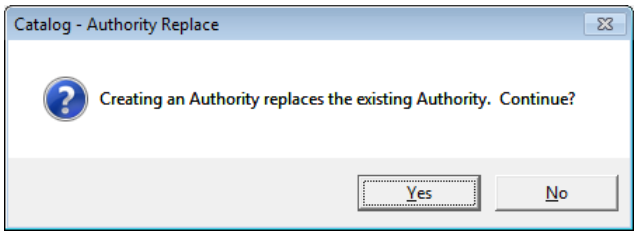


5. The Authority Replace screen will display
6. Type in the Search Term (for example: **PLANTS**) and click the **F5 Query** button to initiate the search:

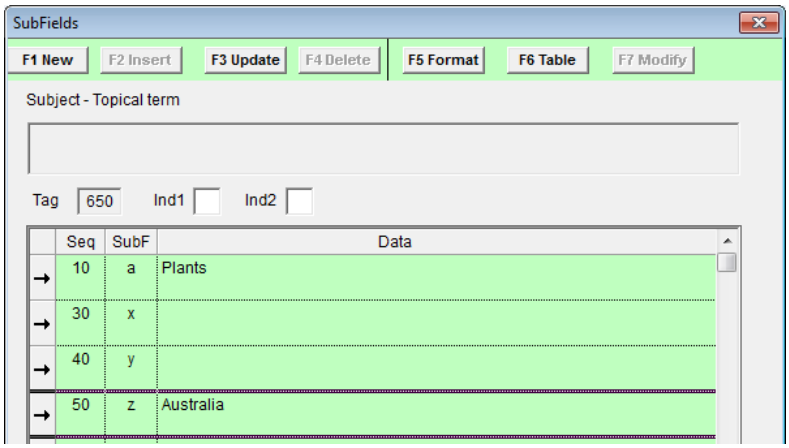


7. If an Authority required is found, select the Authority and click the **F3 Replace** button (as you are replacing the empty field with this existing Authority heading)
8. If the Authority required is not found, you will need to create a new Authority:

    a. Click the **F2 NewAut** button – a prompt with the following message will display: **Creating an Authority replaces the existing Authority. Continue?**

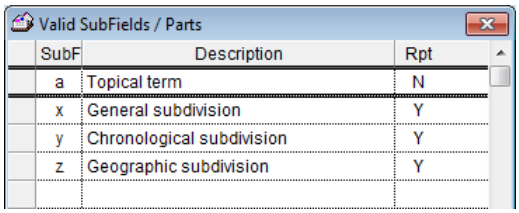


    b. Click the **Yes** button – the Subfields screen will display:

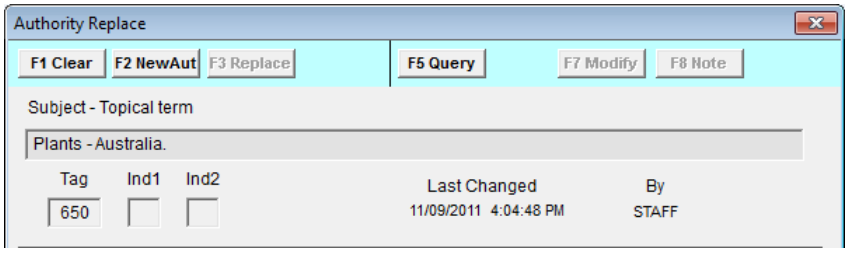


c. Type in the Authority exactly how it is required in the correct Subfields

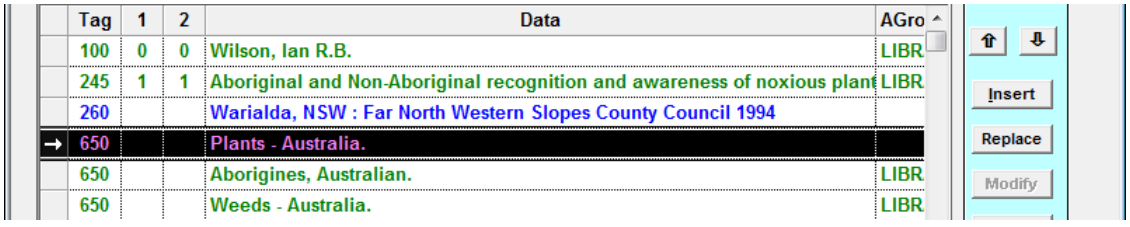
HINT: The **F6 Table** button gives a display of the valid Subfields, which is useful when creating subdivisions for identification of each of the Subfields.



d. Click the **F3 Update** button when complete – the new Authority will appear in the Authority Replace screen (replacing any existing Authority being displayed):

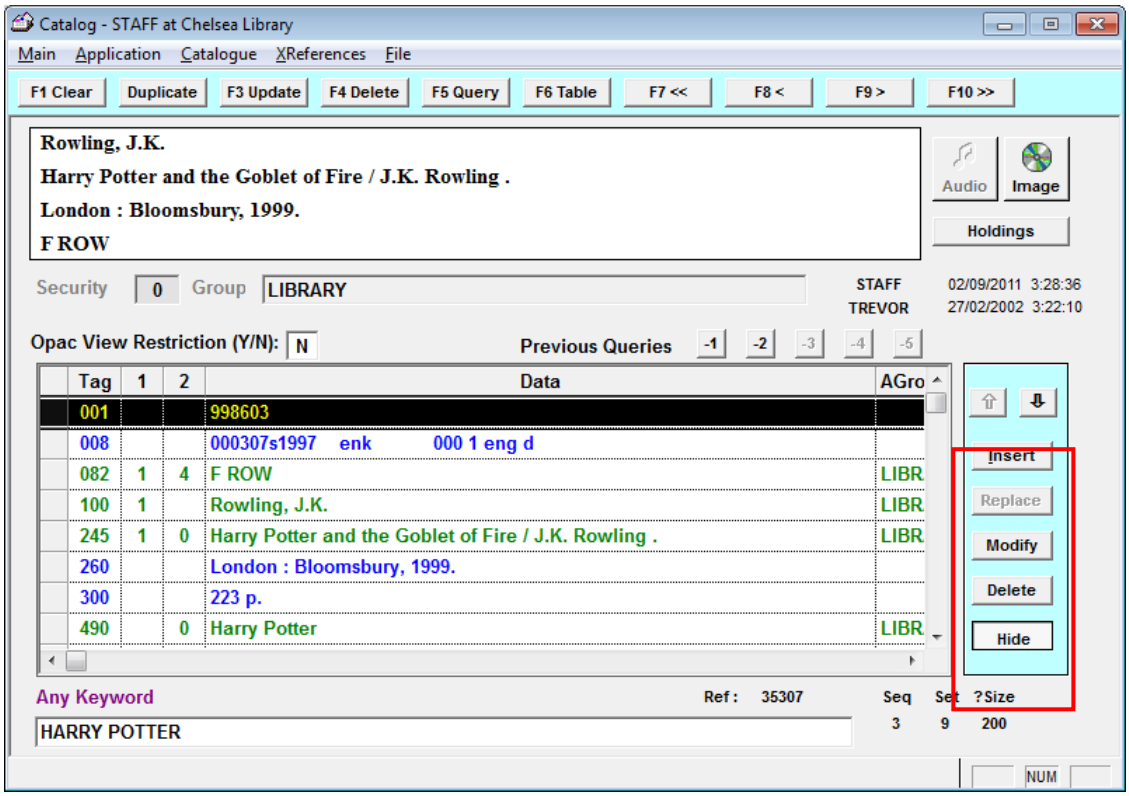


e. Click on the red **[X]** to close the selection table – the new Authority will display in the Catalog screen:



9. Click the **F3 Update** button

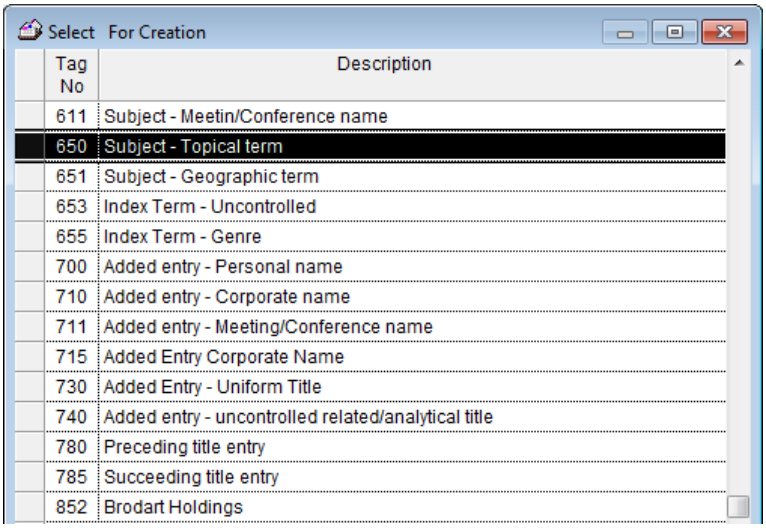
Catalogue Data



- Any heading which contains an Authority, is displayed in **green**
- Any Non-Authority Tag is shown in **blue**

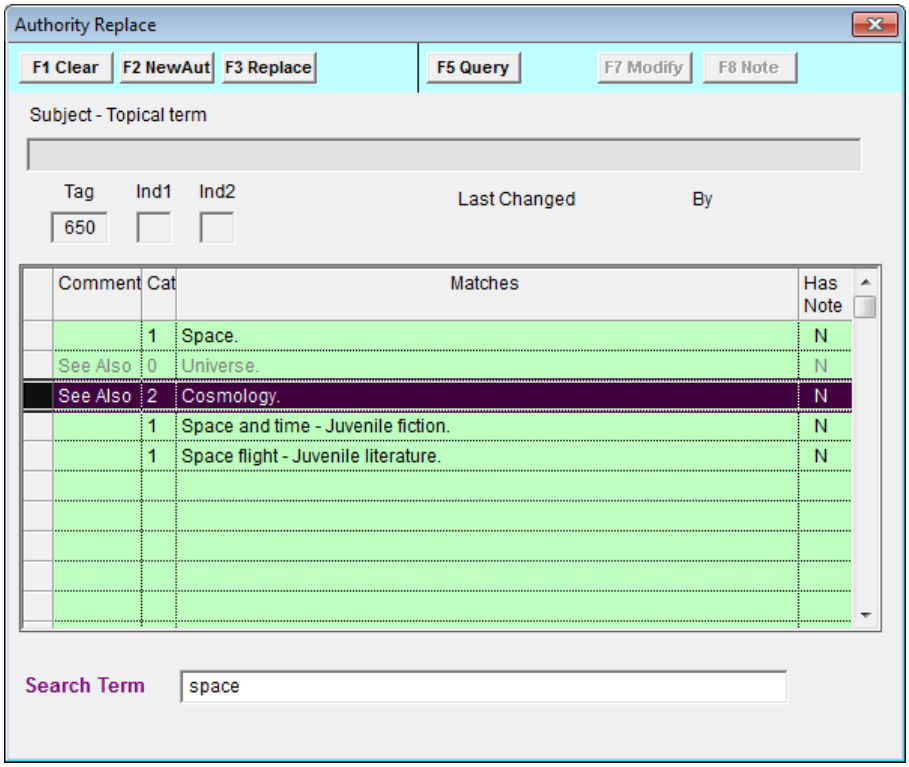
Insert

1. Click the **Insert** button alongside the Data window – a list of Tags will display:



2. Select the relevant Tag (for example: **650 | Subject – Topical Term**) by double-clicking the required entry – the Authority Replace screen will display

3. Type in the Search Term (for example: **SPACE**) and click the **F5 Query** button to initiate the search:



4. The Authorities that match the search term, including Cross References
5. If an Authority required is found, select the Authority and click the **F3 Replace** button (as you are replacing the empty field with this existing Authority heading)
6. It is possible to select one of the See Also references if required for instance **COSMOLOGY**.

This process of adding Tags can be repeated as often as required.

Please Note: The cursor or highlight does not have to be on a specific line when selecting the Insert button. The Tag will be inserted into the correct sequence, depending on the Tag Number.

Replace

Replaces a Tag within the record. This option will bring up a Authority Replace screen where the heading to replace the existing heading can be found. This will replace the Authority used only in the particular record, not all records sharing this authority.

Modify

WARNING! The **Modify** button is to be used with caution. When used when modifying an Authority Tag, the changes will apply to all catalogues using that Authority.

The **Modify** button to the right of the Catalogue data display can be disabled, so that it is more difficult to alter Authorities by mistake.

To disable the **Modify** button:

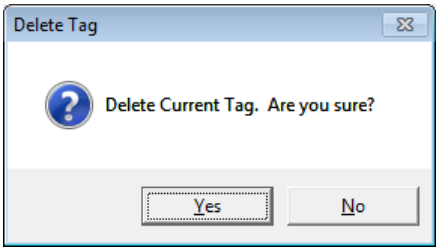
1. Go to **Main** > **Supervisor** > **UserNames** – the User Names screen will display
2. Select a User and click the **F8 Choose** button – the User Security screen will display
3. From the menu, select **ActualMainMenu** > **Catalogues** > **Catalog - NoSharedAuthUpdate**
4. Click the green **Give** button
5. Click the red **[X]** to close out of the User Security screen
6. Exit and restart the *Amlib* client for the changes to take effect

It is still possible to modify authorities from Catalogue by **XReferencing** to the *Authorities* module. The term can then be modified if permissions allow.

Delete

Deletes a Tag for this record. This will delete the Authority used only in the particular record, not all records sharing this authority.

If the **Delete** button is clicked – a prompt with the following message will display: **Delete Current Tag. Are you sure?**



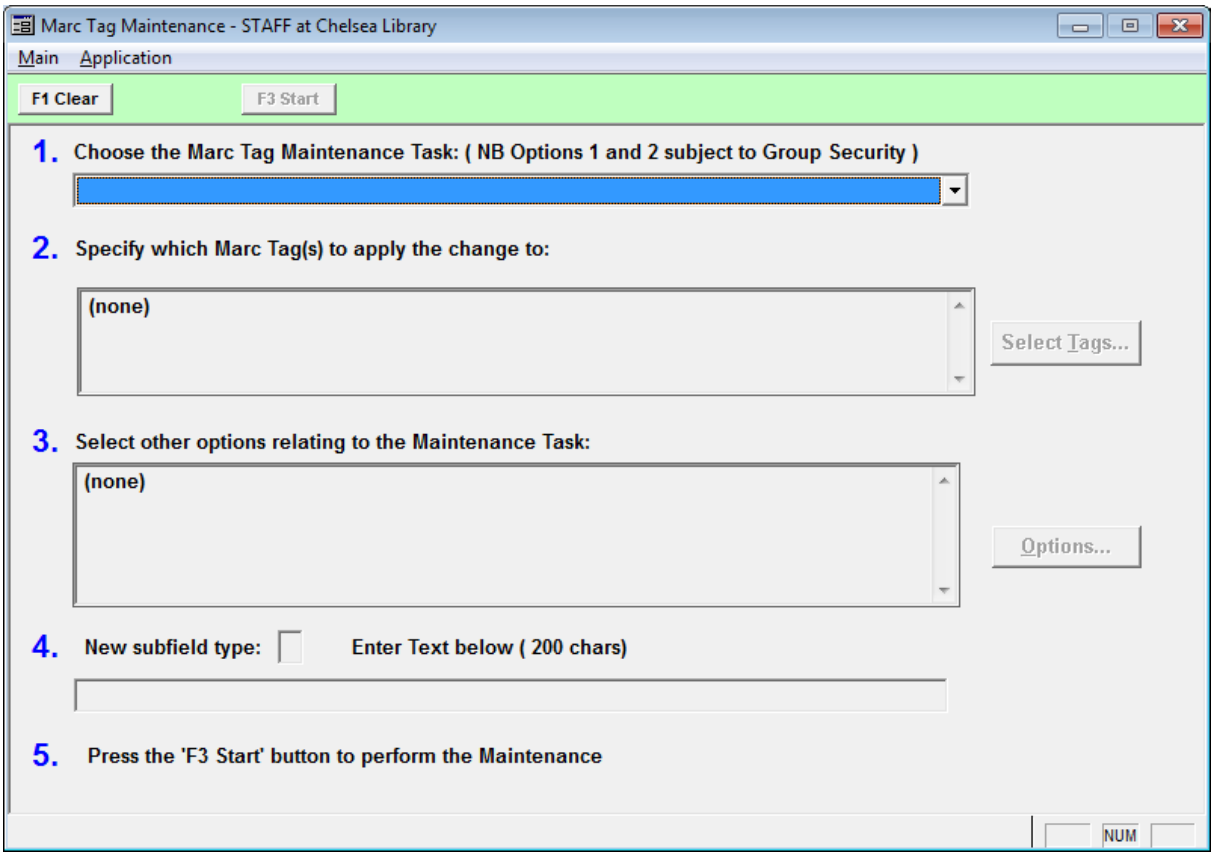
Show/Hide

Alternates between hiding/showing Tags for this record.

Authority Maintenance Facility

CAUTION: Most of these options should be used in conjunction with advice from *Amlib Support*.

1. Launch the *Amlib* client
2. Go To **Main** > **Authorities** > **MarcTagMaintenance** – the Marc Tag Maintenance screen will display:



Process each task in 5 steps:

1. Choose the Marc Tag Maintenance Task from the dropdown list
2. Select which Marc Tag(s) to apply the change to... using the **Select Tags...** button
3. Select Other options relating to the Maintenance Task... using the **Options...** button
4. Enter a New subfield type (if applicable – only for Task: **Add a subfield to a Tag (replaces existing) or leave blank to delete subfield**)
5. Click the **F3 Start** button to begin the process

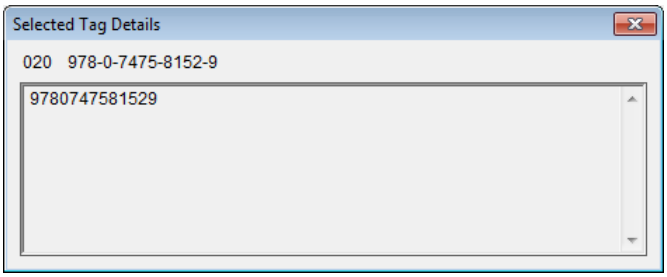
OPTION	EXPLANATION	EXAMPLE
Mass Delete all Unused Authorities	Three (3) options are available: **Level 1** will delete the least data, **Level 3** the most data: **Level 1**: *Only Authorities that have never been used on your database will be deleted. Therefore subject headings that have been used as a* See, See Also, RT, NT, *etc.* ***will not*** *be deleted* ***Level 2****:* Will delete Authorities that are not attached to a Catalogue record but will retain Authorities where one of the references (*NT*, *BT* etc.) is attached to a Catalogue record **Level 3**: *Will delete any Authority that is not directly attached to a Catalogue record*	**Please Note:** As schools import *SCIS* Authority headings, they may not wish to delete the Unused headings
Mass Merge Duplicate Shared Authorities	This merges authorities that have identical Search keys and merges them to one Authority without User Intervention **WARNING:** This option should be used with caution as some Authors may have the same name but in fact are different Authors	**John Smith (1866- 1924)** and **John Smith (1948 -)** are different authors but they have the same Search string – these would be merged if this option is run
Change a Tag to be an Authority/Non-Authority	Allows the User to alter an Authority to be a Non-Authority or a Non-Authority to be an Authority.	**Publisher** may be set as an Authority and it may be required to set it as a Non-Authority
Add a subfield to a Tag (replaces existing) or leave blank to delete subfield	Allows the addition of a Subfield (and Subfield text) to an existing Marc Tag	Add **$z** Subfield to every **856 | URL** Tag with the link text: **Click here to view resource**
Rebuild an Authority Key	If an Authority parameter is altered, the authorities already on the system will not be altered to the new parameter. By running this option, the authorities will be refreshed according to the new parameters	**ISBN** rebuild
Rebuild the keywords for an Authority	If an Authority parameter is altered for keywords (see Marc Tags section above), the data already on the system will not be altered to the new parameter. By running this option, the Authority keywords will be refreshed according to the new parameters	An existing Tag is changed in regard to Keyword code – for example: Series code changed from **T** to **Z** Keyword Restrictor codes
Rebuild the keywords for a Non-Authority	If a Non-Authority parameter is altered for keywords (see Marc Tags section above), the data already on the system will not be altered to the new parameter. By running this option, the Non-Authority keywords will be refreshed according to the new parameters	An existing Tag is changed in regard to keyword code – for example: A **504** Tag is given an **N** Keyword Restrictor code

Rebuild all the keywords	If any Authority or Non-Authority parameter is altered for keywords (see Marc Tags section above), the data already on the system will not be altered to the new parameter. By running this option, the keywords will be refreshed according to the new parameters.	An existing Tag is changed in regard to Keyword code – for example: Series code changed from **T** to **Z** Keyword Restrictor codes OR A **504** Tag is given an **N** Keyword Restrictor code

- See Appendix 2: Authority Maintenance Tasks for more information

ISBN Formats

Amlib now incorporates 13-digit ISBN's. Any new record with a 13-digit number is accepted. All records are searchable by either the 10 or 13-digit number as *Amlib* stores **both** versions of the ISBN.



Searching for ISBN's in the *Authorities* module or **Catalogue** module can be done via **ISBN** or **Any Authority**.

Taking Off Responsibility in Title (Tag 245)

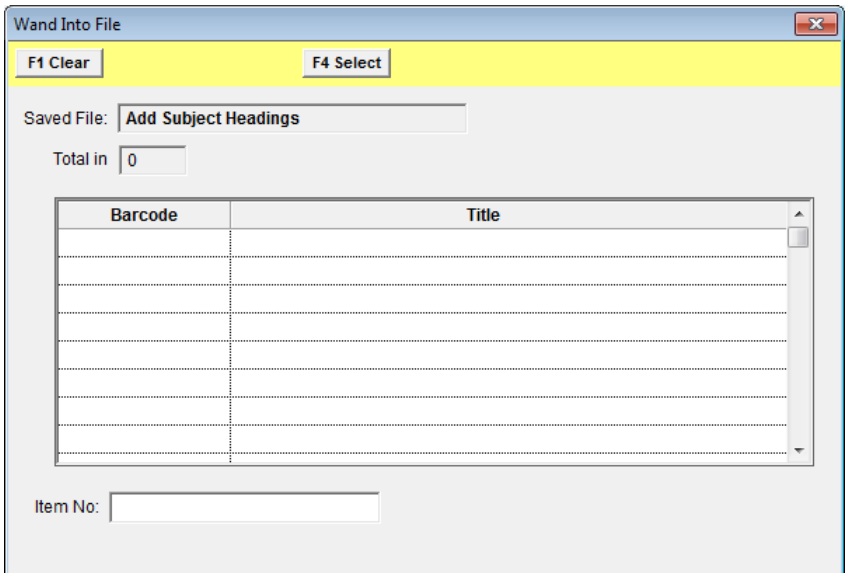
You can globally hide the Responsibility information (**c** Subfield) from the Title (**245 | Title Statement** Tag). For example, **The frog / Sabrina Crewe ; [illustrated by Colin Newman]** will be changed to be simply a title of **The frog**.

- See: Appendix 3: Taking Off the Responsibility in Title for more information

Add an Authority to Catalogue Records in a File

It is possible to add an Authority, like a subject heading to all the catalogue records in a file.

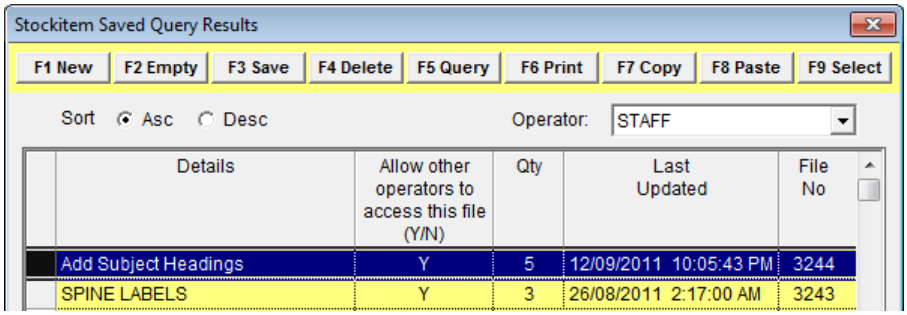
1. Create a **Saved File** of bibliographic records in the *Catalogue* module. One method to do this:
    a. Launch the *Amlib* client
    b. Open the *Stockitem* module
    c. Select **File** > **WandIntoFile** – the Wand Into File screen will display
    d. Click the **F4 Select** button – the Stockitem Saved Query Results screen will display
    e. Highlight an existing file, or click the **F1 New** button to add a new file (name it and then click the **F3 Save** button)
    f. Saved File: = selected file (for example: **Add Subject Headings**)



g. Scan all items

h. Close out of Wand Into File window when complete

i. In Stockitem module, select **File** > **DisplayFile** – the Stockitem Saved Query Results screen will display:



j. Highlight the saved file (for example: **Add Subject Headings**) and click the **F9 Select** button

k. Highlight all the items in the table

l. From the Stockitem List menu, select **XReference** > **Catalogue** – this will bring up the selected records in the Catalogue List table in the *Catalogue* module

m. From the Catalogue List menu, select **File** > **Save All** – the Catalogue Saved Query Results screen will display

n. Highlight an existing file, or click the **F1 New** button to add a new file (name it and then click the **F3 Save** button)

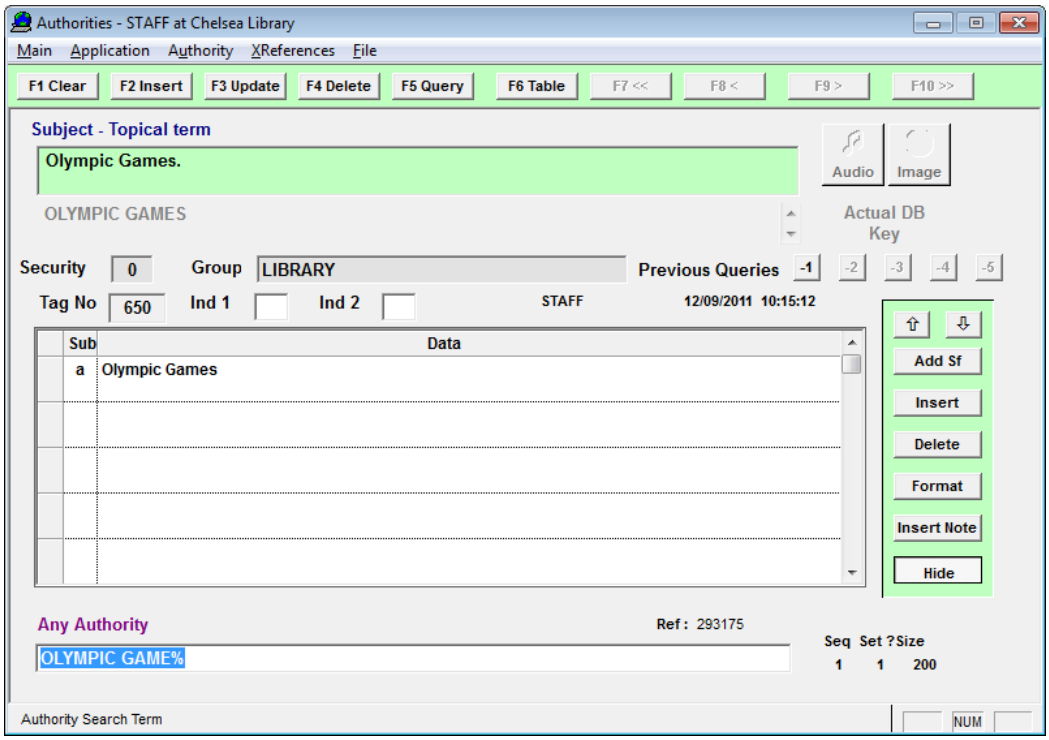
o. Click the **F9 Select** button

Ultimately, how you create the Catalogue File is really up to you.

2. Once you have the File, you then need to find the Authority to add: open the Authorities module, type in your Search Term and then click the **F5 Query** button

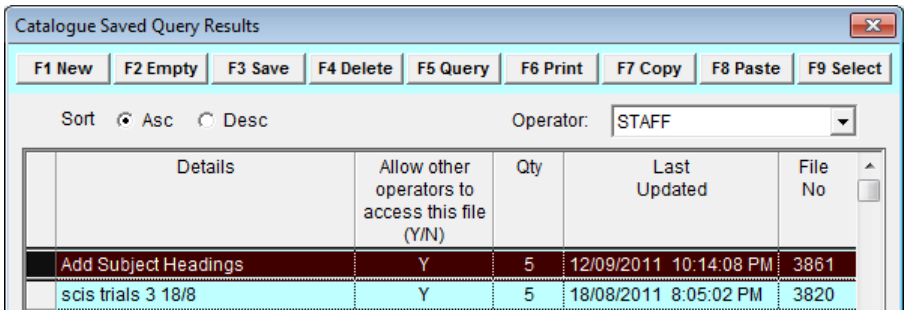
3. Select your term from the list

For example: you may want to add the subject **Olympic Games** to a number of bibliographic records (within the File).

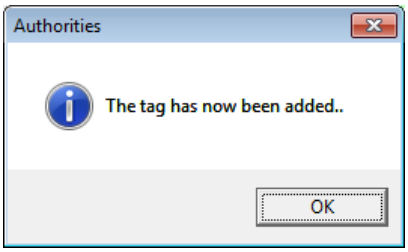


4. Once the Authority is showing in the Authorities screen, select **File** > **AddToCatsInFile** from the menu – the Catalogue Saved Query Results screen will display

5. Highlight the relevant file in the Catalogue Saved Query Results list:



6. Click the **F9 Select** button – a prompt with the following message will display:
The tag has now been added..



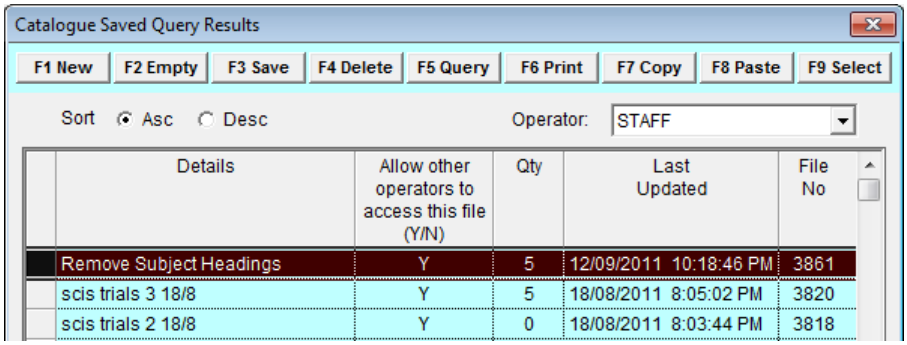
7. Click the **OK** button

Remove from Cats in File

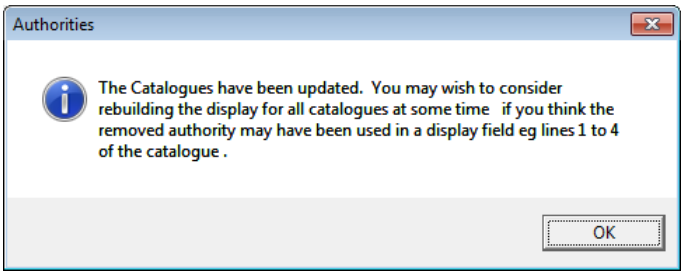
It is also possible to remove an authority, like a subject heading from a file of catalogue records in a similar way.

1. In the *Authorities* module , locate the Authority to remove using a **F5 Query** search
2. From them Authorities screen menu, select **File** > **RemoveFromCatsInFile** the Catalogue Saved Query Results screen will display

3. Highlight the relevant file in the Catalogue Saved Query Results list:



4. Click the **F9 Select** button – a prompt with the following message will display: **The Catalogues have been updated. You may wish to consider rebuilding the display for all catalogues at some time if you think the removed authority may have been used in a display field eg lines 1 to 4 of the catalogue.**



5. Click the **OK** button

Please Note: We recommend that you Rebuild the Catalogue Display (**Main** > **Catalogue** > **CatMaintenance**) after completing this procedure.

- **Main** > **Reports** > **RepAuthority**

Go to Authority Reports to get Authority Listings, Audit of Authorities and lists of *See* or *See Also* references. The selection items are Key (first letters) of the Authority data and the Tag number upon which it is based.

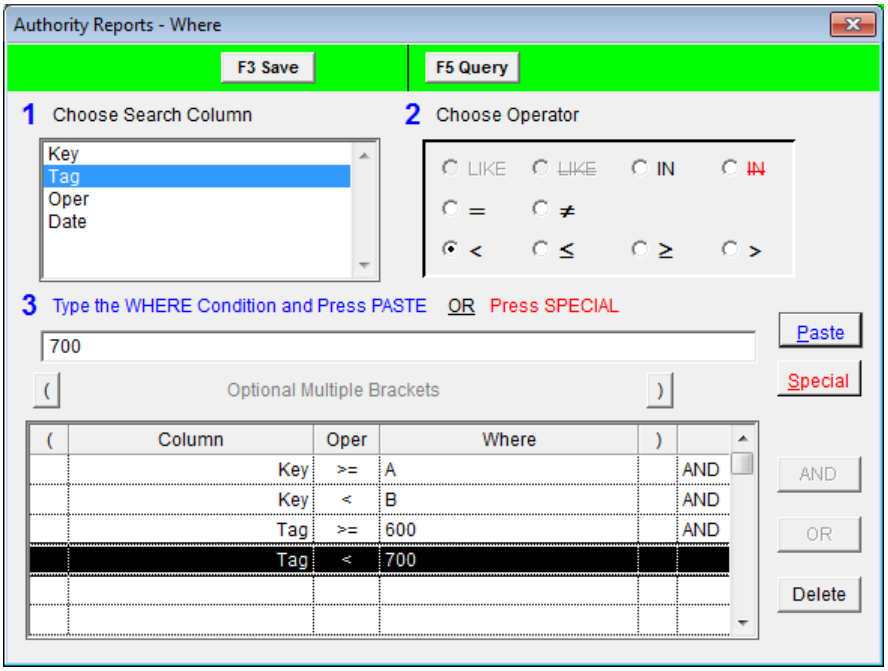
Simple reports can be used to see new Subject Headings entered in the database, in case *See* and *See Also* references need to be added.

Where Parameters (F7 Where)

Search options available will depend on the template. These include:

OPTION	EXPLANATION	EXAMPLE
Key	Actual data from the database	**A** (Beginning with letter A)
Tag	Tag Number required	**100** (for Author)
Oper	Operator is the Login User	**STAFF**
Date	Date in *dd/mm/yyyy* format	**18/09/2010**

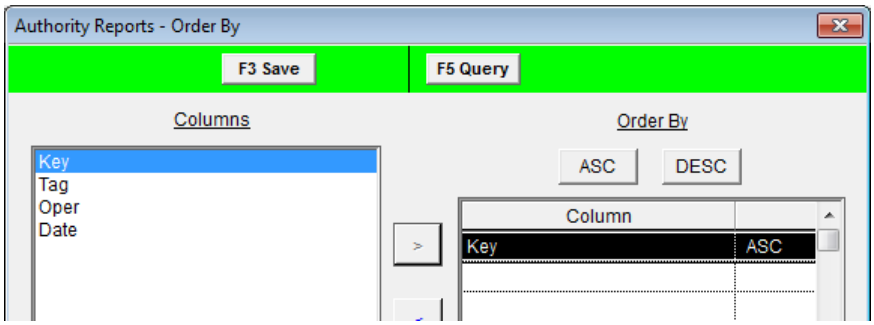
For example: to get all Subject Headings that begin with **A**, set the Where parameters as follows:



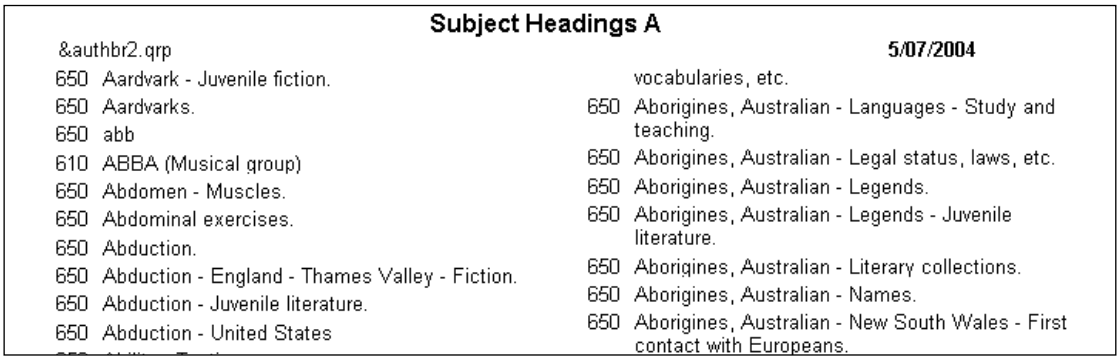
HINT: An alternative to setting Where parameters is to have items saved in a Saved File. For example: new authorities from a Marc Take Up process can be viewed in this way, setting the Where parameters to display only certain Tags – i.e. **100**, **650**, etc.

Order By (F9 Order)

- **Key** is the actual data



- Line by Line – 2 columns (**&AUTHBR2.QRP**)



Subject Headings A

&authbr2.qrp **5/07/2004**

650 Aardvark - Juvenile fiction.
650 Aardvarks.
650 abb
610 ABBA (Musical group)
650 Abdomen - Muscles.
650 Abdominal exercises.
650 Abduction.
650 Abduction - England - Thames Valley - Fiction.
650 Abduction - Juvenile literature.
650 Abduction - United States
vocabularies, etc.
650 Aborigines, Australian - Languages - Study and teaching.
650 Aborigines, Australian - Legal status, laws, etc.
650 Aborigines, Australian - Legends.
650 Aborigines, Australian - Legends - Juvenile literature.
650 Aborigines, Australian - Literary collections.
650 Aborigines, Australian - Names.
650 Aborigines, Australian - New South Wales - First contact with Europeans.

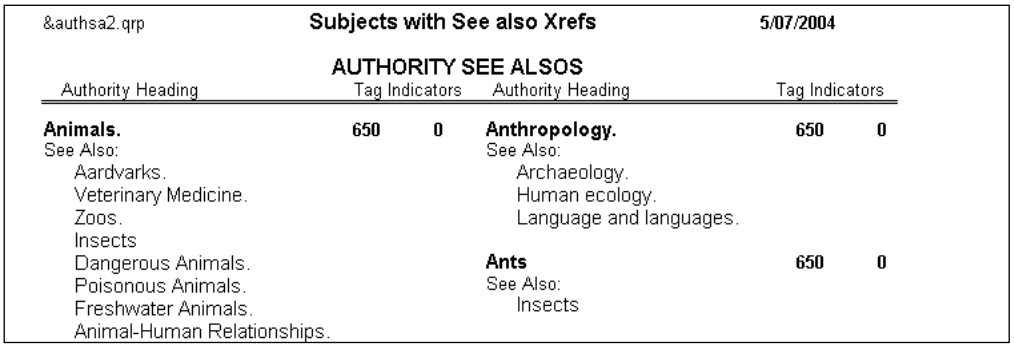
Report Samples

Check the *Basic Reports Manual* for more examples.

- See Also References (**&AUTHSAB.QRP**)
- See Also References – 2 columns (**&AUTHSA2.QRP**)

Example Where parameters:

- **Tag = 650** AND
- **Key LIKE Animal**



&authsa2.qrp **Subjects with See also Xrefs** **5/07/2004**

AUTHORITY SEE ALSOS

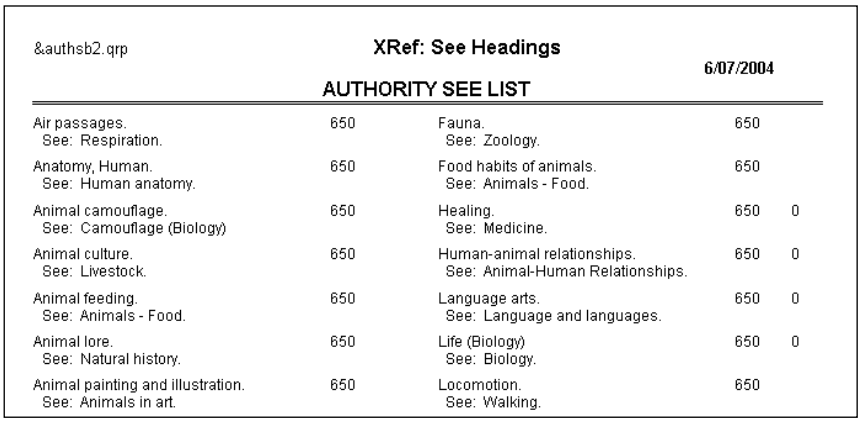
Authority Heading	Tag	Indicators	Authority Heading	Tag	Indicators
Animals.	**650**	**0**	**Anthropology.**	**650**	**0**
See Also:			See Also:		
Aardvarks.			Archaeology.		
Veterinary Medicine.			Human ecology.		
Zoos.			Language and languages.		
Insects					
Dangerous Animals.			**Ants**	**650**	**0**
Poisonous Animals.			See Also:		
Freshwater Animals.			Insects		
Animal-Human Relationships.					

- See References – 2 columns (**&AUTHSB2.QRP**)

Example Where parameters:

- **Tag = 650** AND
- **See Key > AAA** AND

- **See Key < AZZ**



&authsb2.qrp

XRef: See Headings

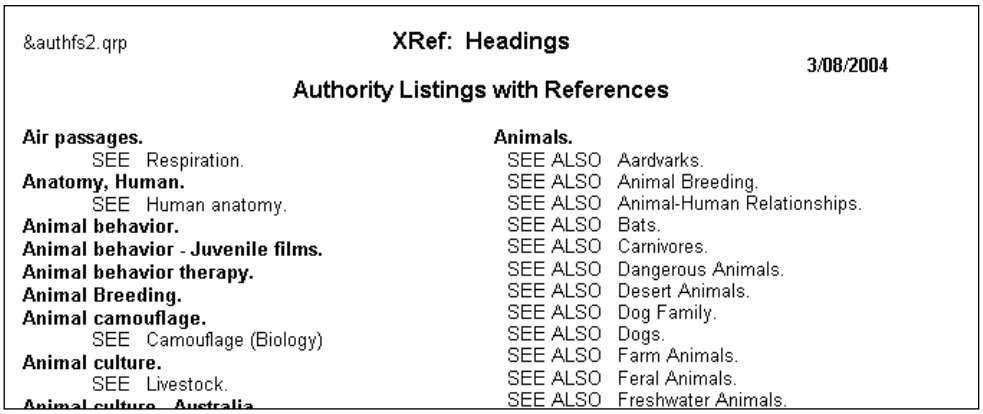
6/07/2004

AUTHORITY SEE LIST

Air passages. See: Respiration.	650	Fauna. See: Zoology.	650	
Anatomy, Human. See: Human anatomy.	650	Food habits of animals. See: Animals - Food.	650	
Animal camouflage. See: Camouflage (Biology)	650	Healing. See: Medicine.	650	0
Animal culture. See: Livestock.	650	Human-animal relationships. See: Animal-Human Relationships.	650	0
Animal feeding. See: Animals - Food.	650	Language arts. See: Language and languages.	650	0
Animal lore. See: Natural history.	650	Life (Biology) See: Biology.	650	0
Animal painting and illustration. See: Animals in art.	650	Locomotion. See: Walking.	650	

- All Cross References – See and See Alsos (**&AUTHFS2.QRP**)

Please Note: Ensure that the template used by this report is set with a Choose Type of: **Authority with See and See Alsos**.



&authfs2.qrp

XRef: Headings

3/08/2004

Authority Listings with References

Air passages.
SEE Respiration.
Anatomy, Human.
SEE Human anatomy.
Animal behavior.
Animal behavior - Juvenile films.
Animal behavior therapy.
Animal Breeding.
Animal camouflage.
SEE Camouflage (Biology)
Animal culture.
SEE Livestock.
Animal culture - Australia

Animals.
SEE ALSO Aardvarks.
SEE ALSO Animal Breeding.
SEE ALSO Animal-Human Relationships.
SEE ALSO Bats.
SEE ALSO Carnivores.
SEE ALSO Dangerous Animals.
SEE ALSO Desert Animals.
SEE ALSO Dog Family.
SEE ALSO Dogs.
SEE ALSO Farm Animals.
SEE ALSO Feral Animals.
SEE ALSO Freshwater Animals.

- Authority URLs – Checking URL Links (**&AUTH856.QRP**)

In order to check the URL links for catalogued Websites, it is necessary to create a report that will find the URLs in your Library Database. Once a report has been compiled, a Linking Checking Program (many are available as Shareware on the Internet or a suitable program can be purchased) can be used to test the links.

The Where parameters could be Where: **Tag = 856.** It is recommended that the results be sent to a Text File for use with the URL Link Checking program.

The results will be a Text File, an example is shown below:

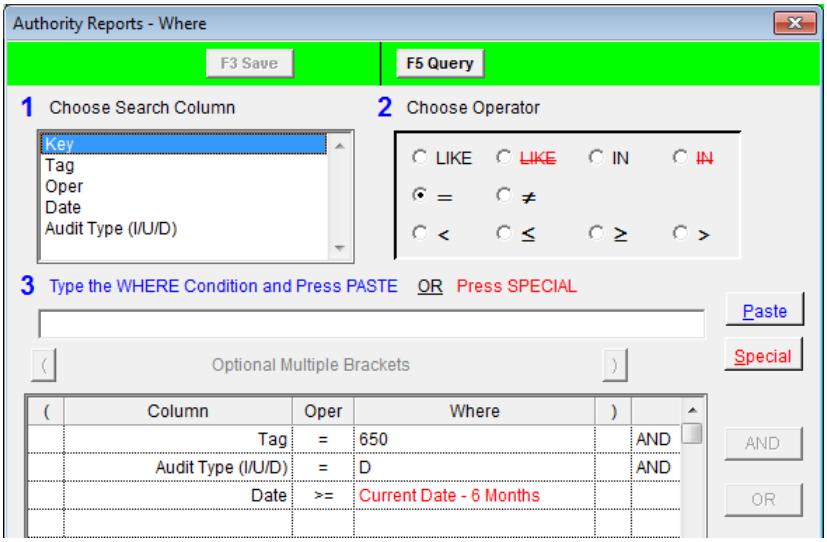
```
<p>AUTHORITY 856 TAG EXPORT (For hyperlink verification)</p>
<p>
<a href="http://agnet.com.au/">http://agnet.com.au/</a><br>
<a href="http://amgaye/My documents/AMLIB Information/User Groups/030430 Pub agenda .doc">http://amgaye/My docu
.doc</a><br>
<a href="http://amgaye/School/NUMBAT.doc">http://amgaye/School/NUMBAT.doc</a><br>
<a href="http://archnet.uconn.edu/">http://archnet.uconn.edu/</a><br>
<a href="http://builder.cnet.com/webbuilding/0-3880.html">http://builder.cnet.com/webbuilding/0-3880.html</a><b
<a href="http://carlos.emory.edu/ODYSSEY/NEAREAST/arch.html">http://carlos.emory.edu/ODYSSEY/NEAREAST/arch.html
<a href="http://education.qld.gov.au/tal/edulist/reviews/ef102803.htm">http://education.qld.gov.au/tal/edulist/
<a href="http://education.qld.gov.au/tal/edulist/reviews/ef102835.htm">http://education.qld.gov.au/tal/edulist/
<a href="http://etext.lib.virginia.edu/stc/Coleridge/stc.html">http://etext.lib.virginia.edu/stc/Coleridge/stc.
```

- Authority Audit (**&AUTHAUD.QRP**)

Reports changes to authorities. It will detail the operator and date of change. The selection keys are **Tag No**, **Date** and/or **Operator**. The Report indicates the type of change by a code.

CODE	EXPLANATION
I	Inserted
D	Deleted
U	Updated

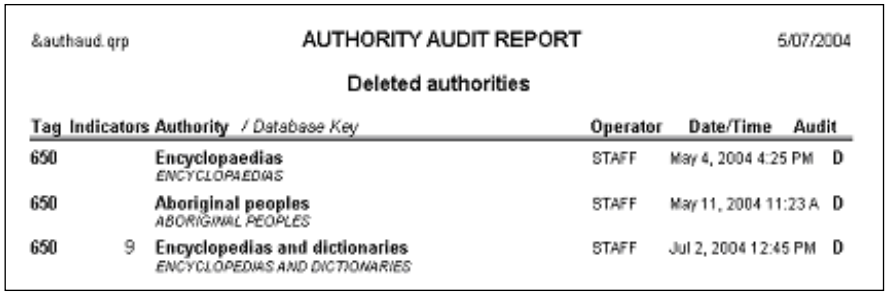
Example Where parameters:



This could be a date range. You may also wish to determine which Tags to check – for example: **Tag = 650**.

Order By:

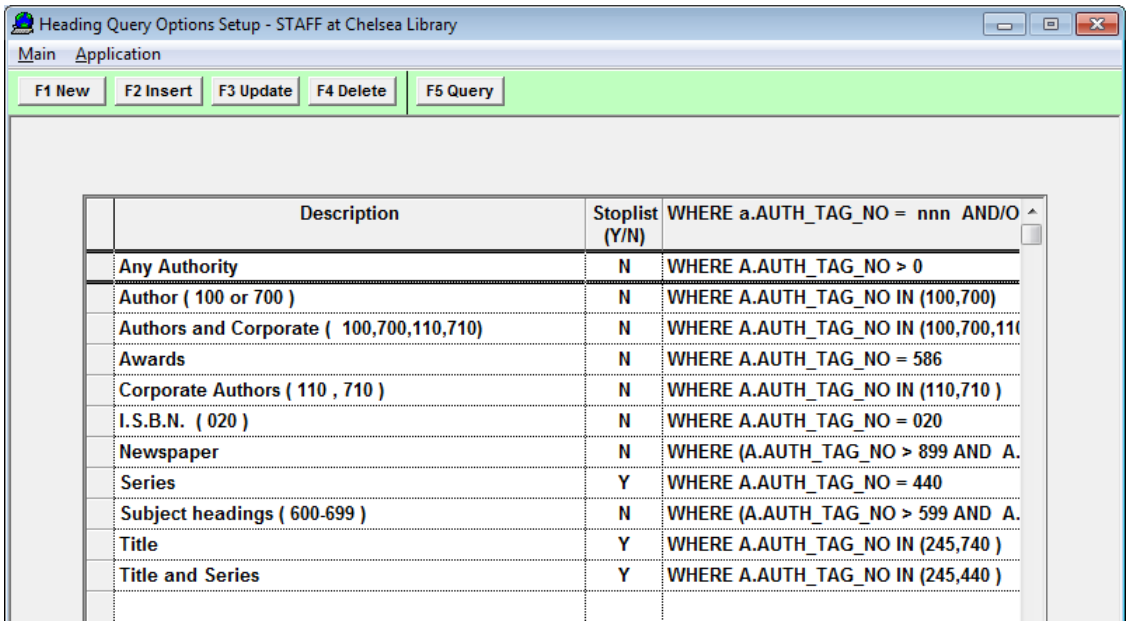
Can be by **Operator**, **Tag** or **Date** order.



OTHER AUTHORITY MENU ITEMS

Authority Enquiry Options

- **Main** > **Authorities** > **AuthQueryOptions**



This screen allows maintenance of the Authority Query Options table (used when conducting searches in the *Authorities* module.) Any 'suitable' Tag (for example: a Marc Tag defined as an Authority) may be used as an enquiry point.

COLUMN HEADING	EXPLANATION
Description	The description of the enquiry which appears on the Authority Enquiry
Stoplist (Y/N)	Whether this particular enquiry should have leading 'the' 'a' etc automatically removed
Where a.AUTH_TAG_NO = nnn AND/OR a.AUTH_TAG_NO	The SQL program statement used in the enquiry. The SQL statements formulating the enquiry are added to the program at Runtime and almost any enquiry may be defined. The SQL statement is consistent in its format: **Single Tags** "**Where a.auth_tag_no = nnn**" (where **nnn** is the Tag number being queried) **Multiple Tags** may be queried by repeating the statement and joining it with an OR clause: "**Where a.auth_tag_no = nn1 OR a.auth_tag_no = nn2**" **Please Note:** Whenever joining TAGS with an OR statement, place brackets around the statement, after Where to the last **tag_no** – for example: **WHERE (A.Auth_tag_no = 440 OR A.Auth_tag_no = 245)**

Authority enquiries may be used to browse the Authority files and subsequently viewing of associated catalogues where applicable.

The *Catalogue* module has a similar enquiry options facility. Both enquiries use the same base data. The essential difference between the two modules is that this enquiry always shows a list of matching Authority records, which may or may not have associated catalogue records, whereas the

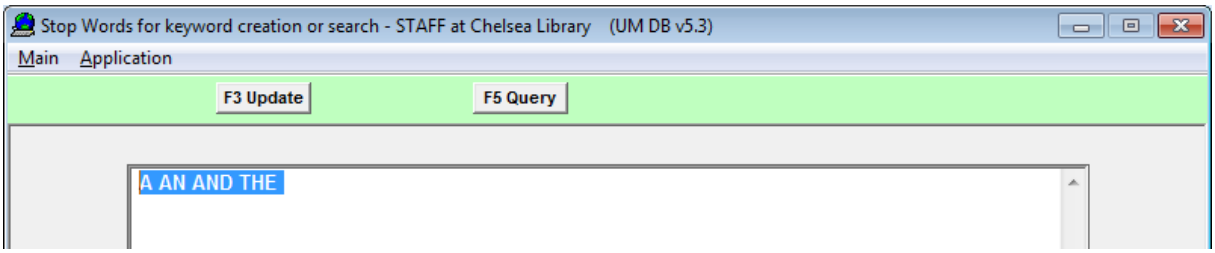
catalogue enquiry always shows a list of matching catalogues. The search term in both cases is a 'like' Authority entry (except when the keyword option has been selected).

Please Note: The keyword enquiry option is always present in the system and does not need to be defined (these options are defined by their presence in the Marc Keyword Restrictors table).

Keyword Stop List

- **Main** > **Authorities** > **KeywordStopList**

Words that cannot be chosen as Index Terms. Used to eliminate non-content bearing words and for efficiency in indexing and storage. After the first significant word (for example: the first non-stop word), other stop words may be included in the search key.



This list is used to prevent selected keywords being created when Catalogue records are entered. The List may be changed at any time but this will not rebuild existing keyword indexes. We would recommend that you make this stop list as short as possible.

Please Note: Always make sure that the last keyword is followed by at least one space.

- Stop lists for Stockitem browse searches are found in **Main** >**StockItems** > **StockitemStopList**

Set Search Size

- Authorities screen: select **Authority** > **SetSearchSize**

This option sets the number of records from **1** to **500** that will be retrieved as a maximum number in a set of search results. To view the next set the Continue Query option **[F11]** can be chosen. The number selected will be the default for Query until the application is logged off or the **Set Back to Default** button is selected.

- The default is set via **Main** > **Supervisor** > **Installation** – Other tab, unless altered in this menu

Show as Default

You are able to have Authority details display automatically by selecting **Authority** > **ShowAsDefault** in the Authorities menu until you log out.

Marc Export

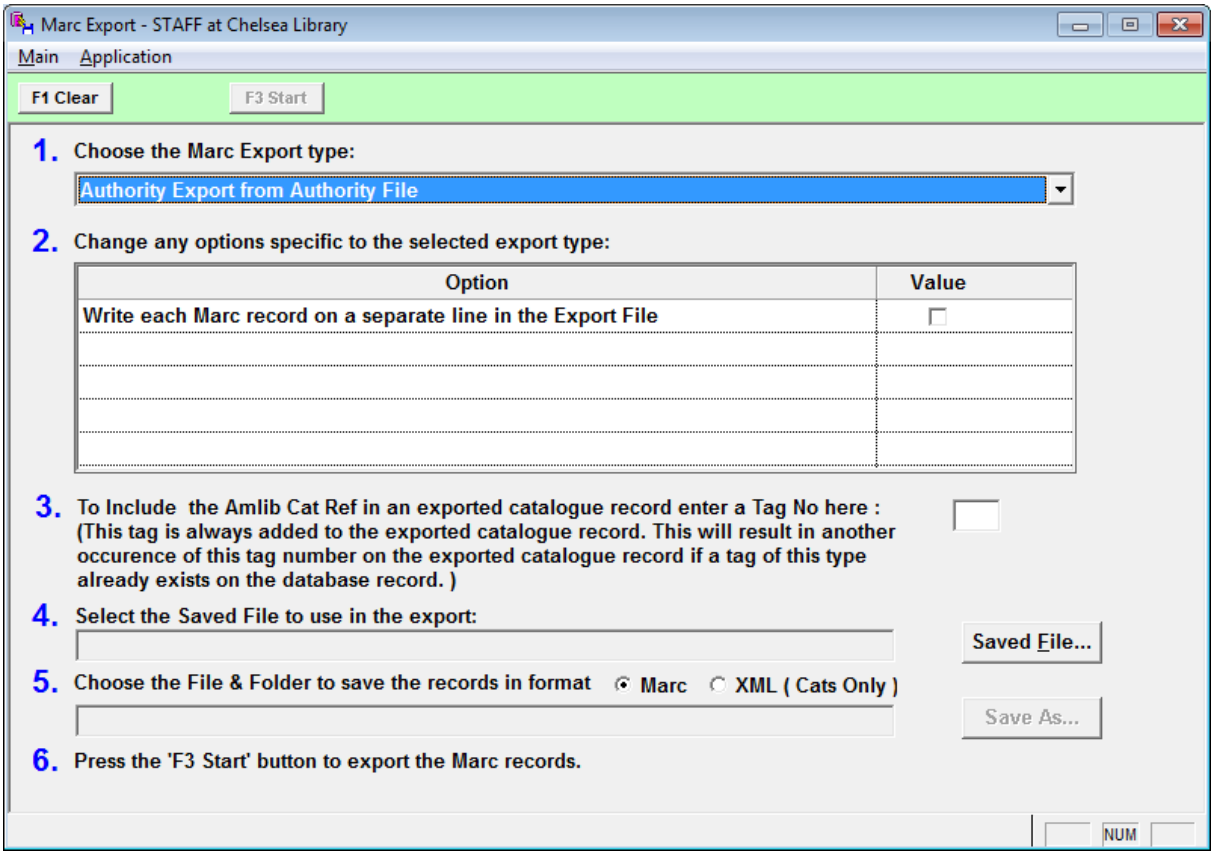
Useful to send records to an external database. The resulting file is a **.Mrc** file. It is necessary to set up the Marc Item Definitions first.

This is an Export window for Catalogue (Bibliographic) records and *See* and *See Also* references in Marc format. It will allow an export catalogues using a saved file from the *Authorities*, *Catalogue* or *Stockitem* modules.

The procedure to export Catalogue records in Marc format is:

1. Create a Saved File in the *Authorities*, *Catalogue* or *Stockitem* modules
2. Go to *Authorities* module: from the menu, select **Application** > **MarcExport**
3. Select options and click the **F3 Start** button

Separate notes are available from *Amlib Support*.



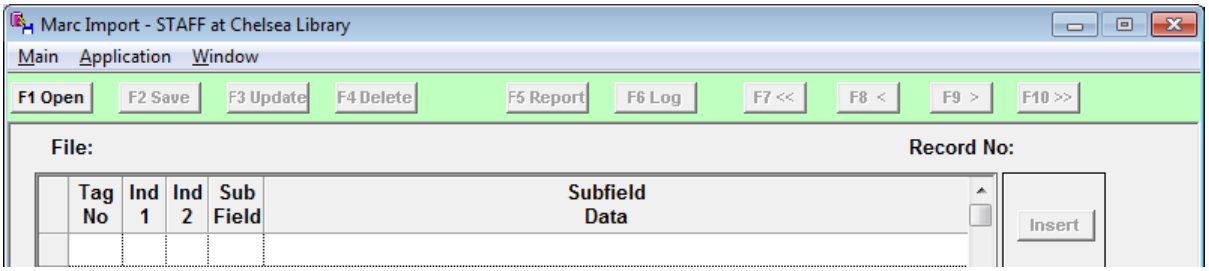
Appendix 1: Loading SCIS Authority Data

These instructions assume that the SCIS Authority data has already been saved onto your computer. The files that are generated vary depending on the contents of the data downloaded – for example: Authors, Subjects, etc. When following the prompts ensure you select the Marc format which is the format required by *Amlib*.

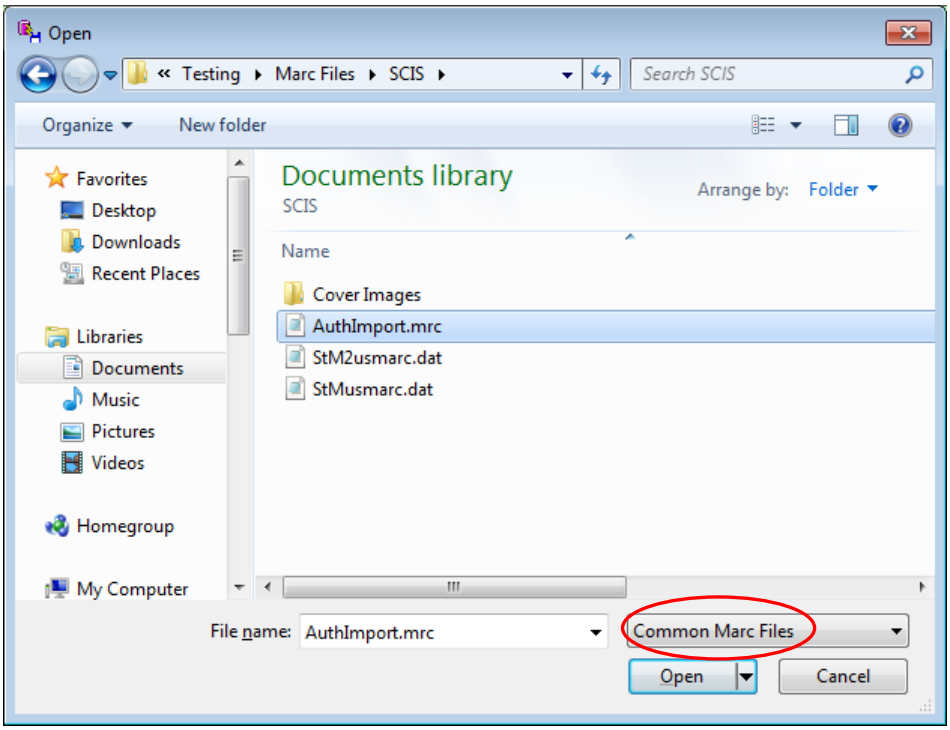
Importing into Amlib

Please Note: The loading of the files can take some time and may slow the system, so load the files when the library is not busy.

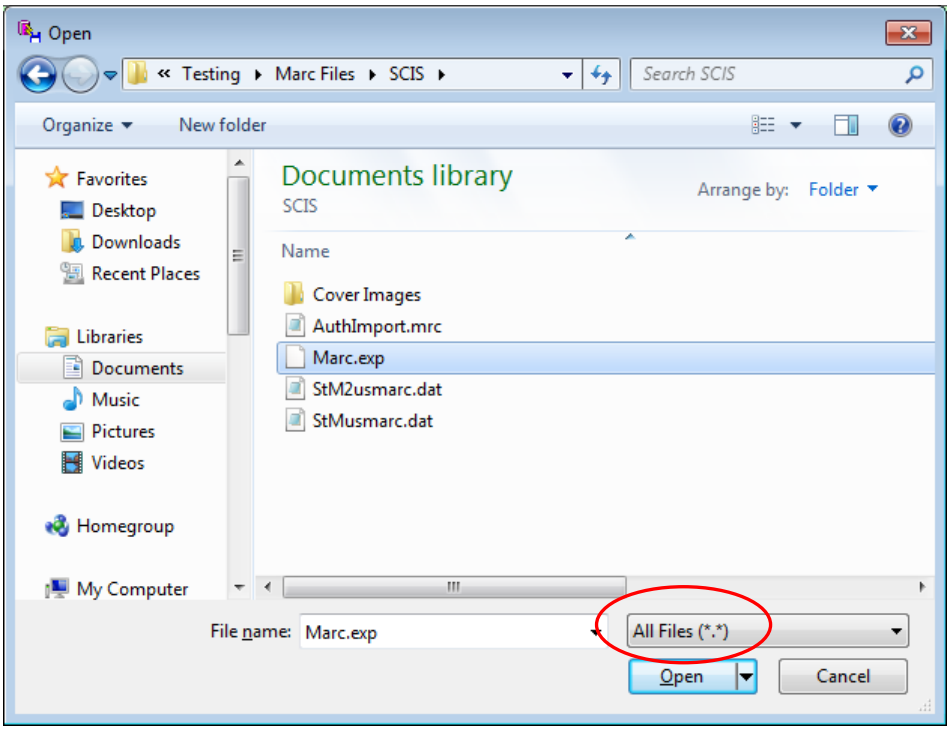
1. Go to **Main** > **Authorities** > **MarcTakeUp** (alternatively use **Ctrl + M**) – the Marc Import screen will display:



2. Click the **F1 Open** button to display the Open dialogue box
3. Locate the file to be processed by using the Look in: drop-down box – for example: if the file is on the C: drive, the Look in: box may say **Local Disk (C:)**



4. If the **Author data** is to be imported this will show as a **Common Marc File**



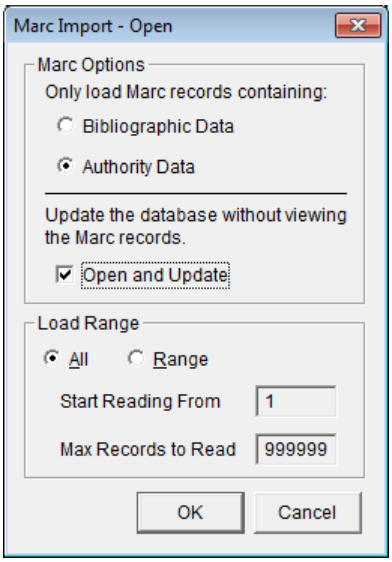
5. If the **Subject Headings** are to be imported, select **All Files (*.*)** from the Files of Type box to display the **Marc.exp** file
6. Highlight the file to be imported and click the **Open** button – the

There are two processing options: Bibliographic Data or Authority Data – this guide covers the import of Authority Data.

Authority Data

This option is to load records which are Authority Data in machine readable format which can be imported into *Authority* application of *Amlib*.

4. The Marc Import – Open screen will display:



HEADING	FIELD	EXPLANATION/OPTIONS	EXAMPLE

Marc Options	**Bibliographic Data**	Bibliographic data to be created for the Catalogue.	Data from external source (for example: *SCIS*, *SL of WA*, *Kinetica* etc. with USMARC Tags)
	Authority Data	Authority data for creation or updating of Authority Headings and/or cross references.	**See** and **See Also** Update from *SCIS* or other source
Update the database without viewing the Marc records	**Open and Update**	If checked (**ticked**), the imported items will not display in the Holding file.	The *Catalogue* will be **Update**d immediately
		If unchecked (**unticked**), the imported items will display in the Holding file.	Review records – the *Catalogue* record will not be updated until the **F3 Update** button is selected
Load Range	**All**	All records from the file are downloaded into a holding file.	**All**
	Range	Selected records from the file are downloaded into a holding file. If Range is selected, the next 2 fields have to be updated.	For example: **1 to 50**

5. Complete the options using the above table:

    d. Marc Options = **Authority Data** (if the data contains machine readable Authority Data to update *See* and *See Also* references, this will be selected automatically as the default)

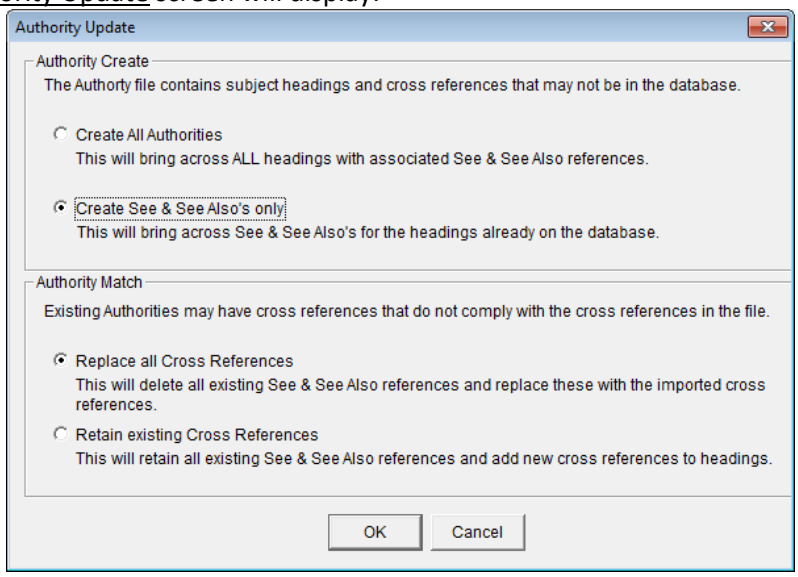
    e. Open and Update = *must* be **ticked**, otherwise you will end up reviewing every individual MARC record (most Authority files are VERY large)

    f. Load Range = **All** (unless the file sizes are quite large)

6. Click on the **OK** button

Authority Update

5. The Authority Update screen will display:



6. Select the following options:

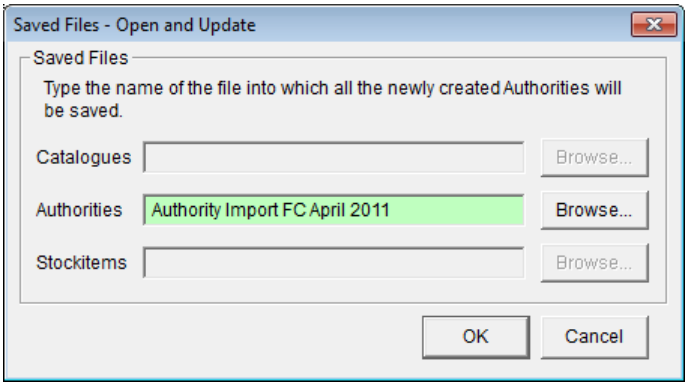
a. Authority Create: Most sites elect to **Create See and See Also's only** so that only headings you actually use will be loaded with cross references coming from *SCIS* however you may choose other options as outlined in the table below

b. Authority Match: **Replace all Cross References** or **Retain existing Cross References**

7. Click the **OK** button

HEADING	FIELD	EXPLANATION/OPTIONS	EXAMPLE
Authority Create The Authority file contains subject headings and cross references that may not be in the database.	**Create All Authorities** This will bring across ALL (subject) headings with associated See & See Also references	All headings that exist in the imported file will be loaded into Authorities, whether they exist or not on the Amlib database, along with associated cross references	The Authority heading **Abacus** does not exist on the Database but does exist on the file. It will be imported along with the Cross references – Seen by Counting devices, See Also Mathematical instruments
	Create See & See Also References only This will bring across See & See Also's for the subject headings already on the database	The program will check data for existing headings and only bring these cross references into Authorities	**Aardvarks** already exists so it will update the See also Animals, and Seen By Anteaters. Abacus does not exist on the Database and will not be imported
Authority Match Existing Authorities may have cross references that do not comply with the cross references in the file.	**Replace all Cross References** This will delete all existing See & See Also References and replace these with the Imported headings	The cross references for existing headings will be cleared before the Import takes place, then load the imported cross references in their place	**Aardvarks** already exists in the file. Before loading the See and See Also references from the file any existing headings will be wiped before loading
	Retain existing Cross References This will retain all existing cross references and add new to subject headings	The cross references for existing headings will not be cleared before the Import takes place, updating the cross references with new imported See & See Also if the heading exist on the database	**Aardvarks** already exists in the file. An existing See Also reference of Aardvarks see also Mammals. This will be retained even though it is not on the file

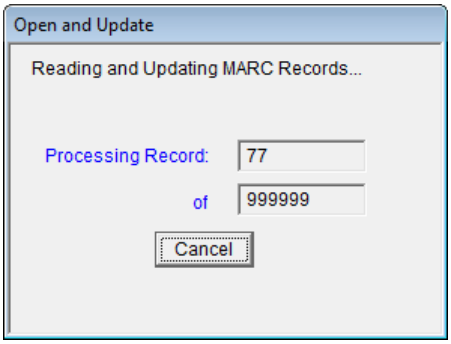
7. The Saved Files – Open and Update screen will display:



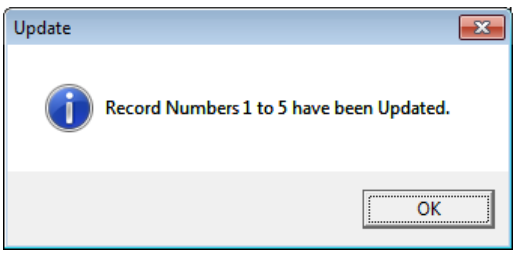
8. Type the name of the file into which all the newly created **Authorities** will be saved
9. Click the **OK** button

HINT: These files assist in finding the newly created Authorities after the import. The Filenames are created so that you can identify the file later. A suggested Filename could be the type of data – for example: **SCIS** or **EXCHANGE**, the date and the initials of the staff member processing the data.

10. An Update prompt will display, indicating the progress of the import:



11. If **Open and Update** was not selected, then when the update is finished an Update prompt will display, showing the number of records Updated:



12. Click the **OK** button

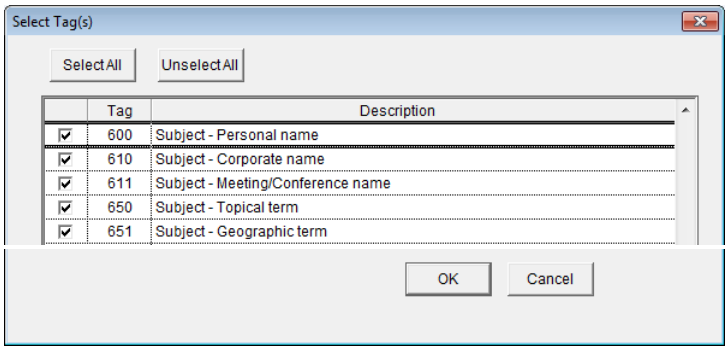
The import of the Authorities is now complete.

Appendix 2: Authority Maintenance Tasks

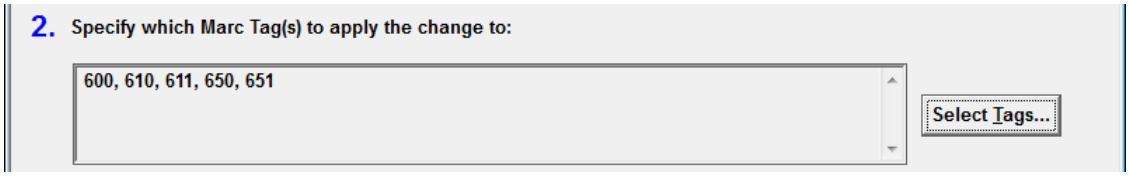
1. Launch the *Amlib* client
2. Go To **Main** > **Authorities** > **MarcTagMaintenance** – the Marc Tag Maintenance screen will display:

Mass Authority Deletion

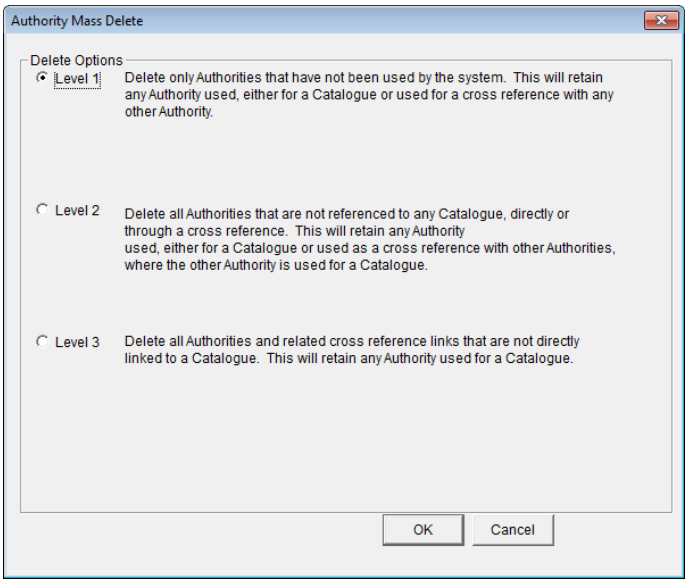
1. Enter the following settings:
    a. 1. Choose the Marc Tag Maintenance Task: select **Mass Delete all Unused Authorities**
    b. 2. Specify which Marc Tags(s) to apply the change to: click the **Select Tags...** button – the Select Tag(s) screen will display:



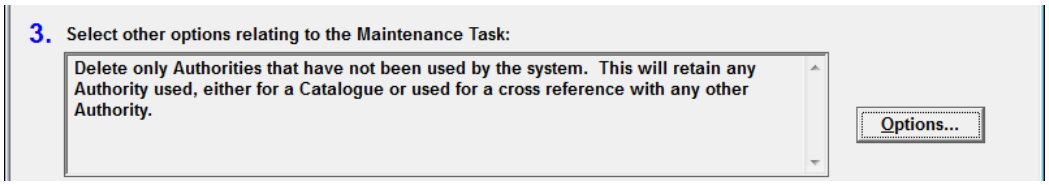
    c. Select the Marc Tag(s) to which to apply the task (click the **Select All** button to choose all Tags) and click the **OK** button



    d. 3. Select other options relating to the maintenance task: click the **Options...** button alongside field 3 – the Authority Mass Delete screen will display:

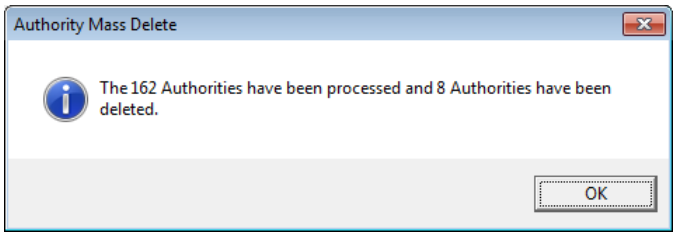


    e. Select the Delete Option (**Levels 1 – 3**) and click the **OK** button



f. The 4. New subfield type box will be ***greyed*** out

2. Click the **F3 Start** button to begin the task process – once the process is completed a prompt will display how many Authority records were deleted:
The XXX Authorities have been processed and XXX Authorities have been deleted.



3. Click the **OK** button

EXAMPLE – WILL THE TERM BE DELETED?				
Term	**Usage**	**Level 1:** Only Authorities that have never been used on your database will be deleted. Therefore subject headings that have been used as a *See*, *See Also*, *RT*, *NT*, etc. will not be deleted	**Level 2:** Will delete Authorities that are not attached to a Catalogue record but will retain Authorities where one of the references (*NT*, *BT*, etc.) is attached to a Catalogue record	**Level 3:** Will delete any Authority that is not directly attached to a Catalogue record
Cats	0	**Y**	**Y**	**Y**
Cats **NT Kittens**	0 0	**N**: The heading is used by the system by having a cross reference	**Y**	**Y**
Cats **NT Kittens**	0 1	**N**	**N**: Neither term will be deleted (the **Cats** heading is being referenced by a catalogue record through the cross reference)	**Y**: The term **Cats** will be deleted. The term **Kittens** will remain (the heading is being directly referenced by a catalogue record)
Cats **NT Kittens**	1 0	**N**	**N**: Neither term will be deleted (the **Kittens** heading is being referenced by a catalogue record through the cross reference)	**Y**: The term **Kittens** will be deleted. **Cats** will remain (the heading is being directly referenced by a catalogue record)
Cats **NT Kittens**	1 1	**N**	**N**	**N**: Both headings are being directly referenced by a catalogue record
Cats	1	**N**	**N**	**N**

Mass Merge Duplicate Shared Authorities

This is a process where the system will automatically mass merge any Shared Authorities (for example: Subject headings or Authors) that have identical Search Keys **without User Intervention.**

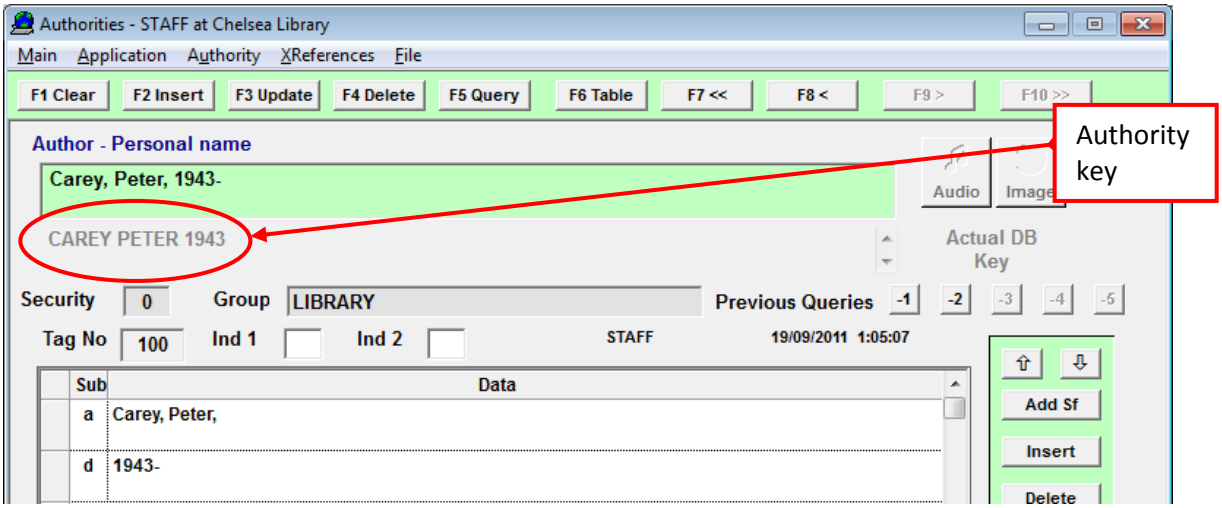
The fuller Authority is retained, and the shorter version merged with it.

Please Note: This option should be used with caution as some Authors may have the same name but in fact are different Authors – for example: **John Smith (1866 - 1924)** and **John Smith (1948 -)** are different authors but they have the same Search Key (Authority Key) – these would be merged if this option is run.

What is the Authority Key?

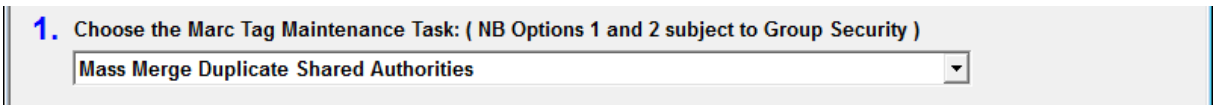
An Authority Key is the actual Database Key. It is how the Authority is stored by *Amlib* in the database. It is used for searching purposes within *Amlib*.

- You can see an example of the current Authority Key by going to **Main** > **Supervisor** > **Authorities** and searching for an authority – for example: **Peter Carey**
- The Authority Key appears in **GREY BOLD** text below:

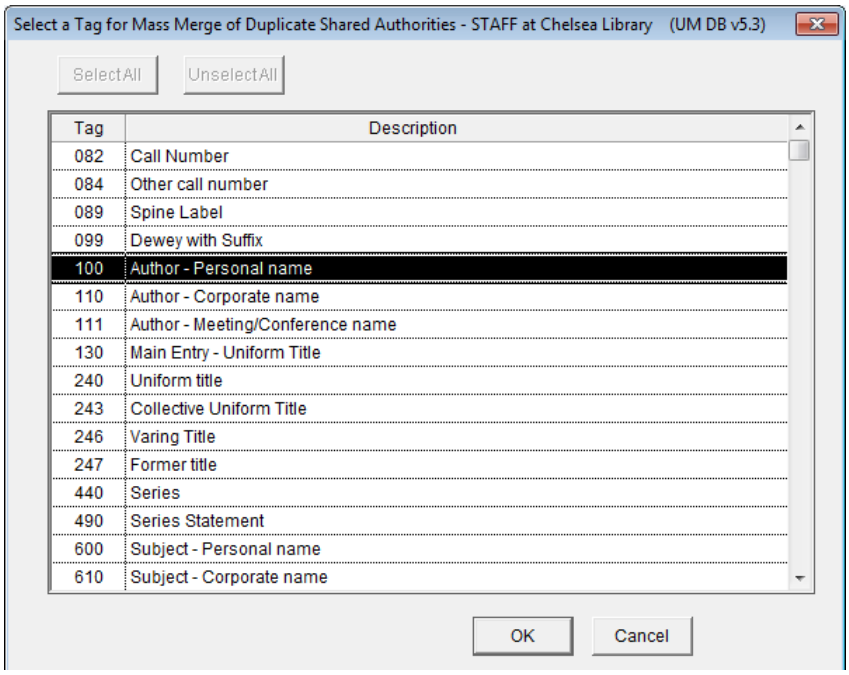


Merge the Shared Authorities

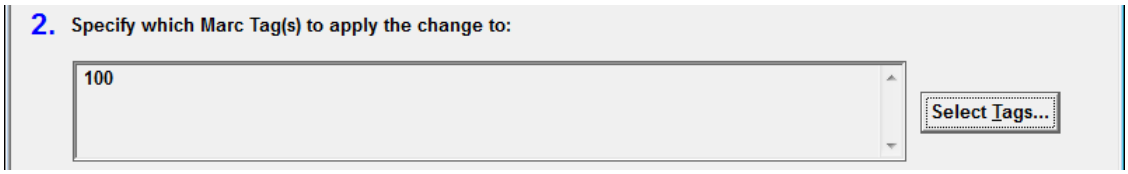
1. Enter the following settings:
    a. 1. Choose the Marc Tag Maintenance Task: select **Mass Merge Duplicate Shared Authorities**



    b. 2. Specify which Marc Tags(s) to apply the change to: click the **Select Tags...** button – the Select Tag(s) screen will display



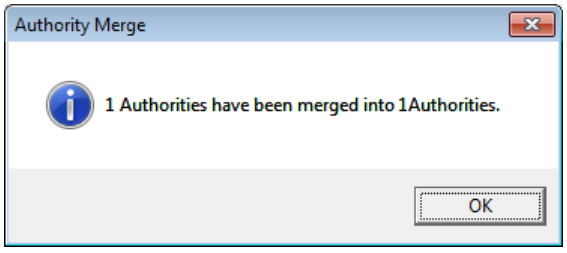
c. Select the Marc Tag(s) to which to apply the task (for example: **650 | Author – Personal Name**) and click the **OK** button



d. The 3. Select other options relating to the maintenance task box will be ***greyed*** out

e. The 4. New subfield type box will be ***greyed*** out

2. Click the **F3 Start** button to begin the task process – once the process is completed a prompt will display how many Authority records were merged:
XXX Authorities have been merged into XX Authorities.



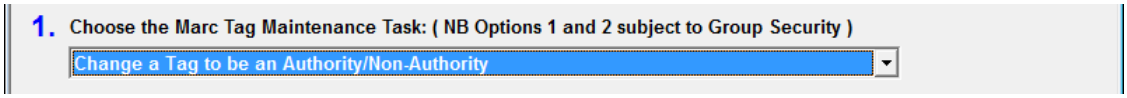
3. Click the **OK** button

Change a Tag to be an Authority/Non-Authority

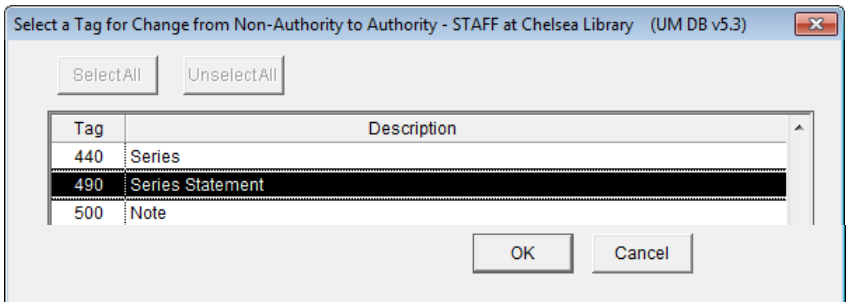
Allows the User to alter an Authority to be a Non-Authority or a Non-Authority to be an Authority.

1. Enter the following:

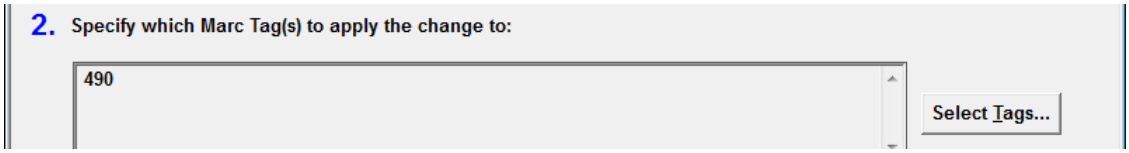
a. 1. Choose the Marc Tag Maintenance Task: **Change a Tag to be Authority/Non Authority**



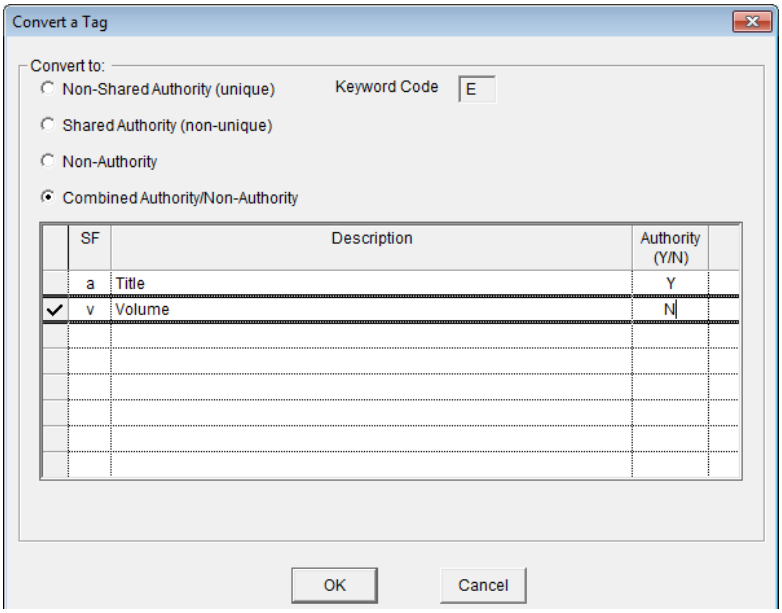
b. 2. Specify which Marc Tag(s) to apply change to: click the **Select Tags…** button – the Select a Tag for Change from Non-Authority to Authority screen will display:



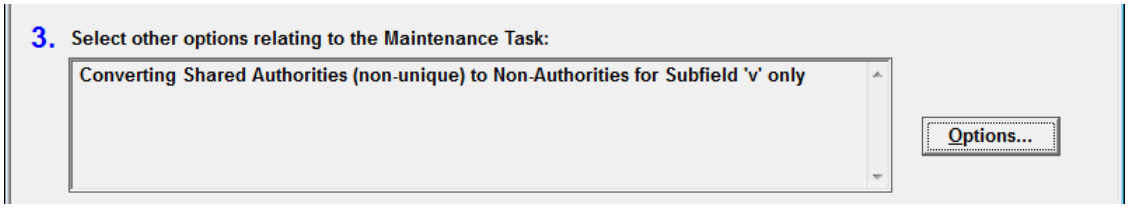
c. Locate the Tag you wish to alter (for example: **490 | Series Statement**), highlight it and click the **OK** button



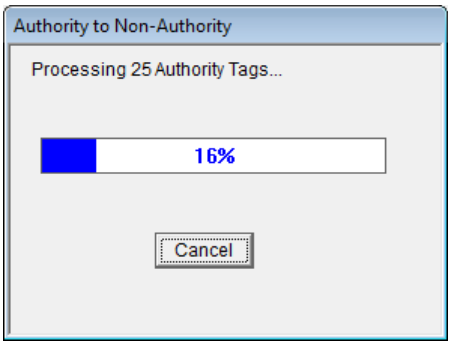
d. 3. Select other options relating to Maintenance Task: click the **Options…** button – the Convert a Tag screen will display:



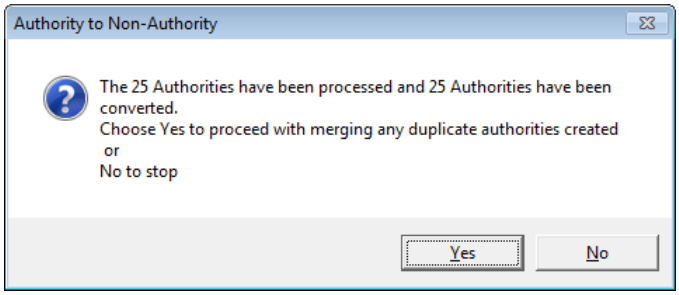
e. Select **Combined Authority/Non Authority** and change the Authority (Y/N) column to **N** for Subfield **v**



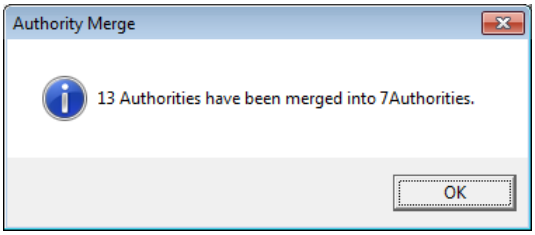
2. Click the **OK** button
3. Click the **F3 Start** to begin (the process will take some time)



4. When complete, a prompt with the following message will display:
   The XX Authorities have been processed and XX Authorities have been converted.
   Choose Yes to proceed with merging any duplicate authorities created
   or
   No to stop



5. Click the **Yes** button – the duplicate Authorities will then be merged – when complete, a prompt with the following message will display:
   XX Authorities have been merged into XX Authorities.



6. Click the **OK** button

To convert an existing Tag choose from the following options. This will change the existing data to convert to the options selected. Ensure also that the Tag definitions set in **Main** > **Authorities** > **MarcTags** also comply with the options required to ensure that any new data entered will be correct.

OPTION	EXPLANATION	EXAMPLE
Non-Shared Authority (unique)	To convert the Tag to a *Unique Authority* which is not shared by any other catalogue record	**020 | ISBN** is usually unique as it should be specific to a catalogue record
Shared Authority (non-unique)	To convert the Tag to a *Non-Unique Authority* which is shared by other catalogue records	**245 | Title Statement** may be set to be Unique but a decision made to make it Shared
Non-Authority	To convert the Tag to be a Non-Authority	**260 | Publisher** may be set to be an Authority and a decision made to make it a Non-Authority (free text)
Combined Authority/Non	To convert the Tag to have some Subfields set as an Authority and	**490 | Series Statement** a Subfield (which refers to the Title) may be

Authority	some set as a Non-Authority	set to be an Authority and the **$v** Subfield (which refers to the Number) can be set as a Non-Authority
Keyword Code	The Keyword Restrictor prefix assigned to a Marc Tag (this can be altered if required)	A Tag may have no Keyword code (for example: **655 | Index Term – Genre).** This option can assign a Keyword Restrictor code (for example: **S**). This should also be assigned in **Main** > **Authorities** > **MarcTags**

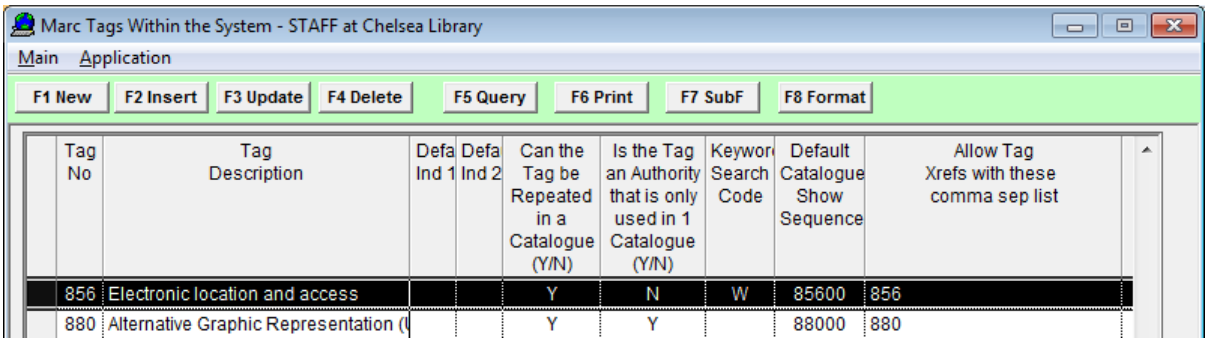
Add Subfield Text to Existing Tag Data (or Remove Subfields)

It is possible to add fixed Subfield data to a nominated Authority Tag. For example: add the link text **Click here to view resource** to the **$z** Subfield of every **856 | URL** Tag on the system (or those that have previously been saved into a File). This allows the *NetOpacs* to display a description rather than a URL from the **$u** Subfield. This applies to websites, e-resources or documents.

Marc Tag Settings

Ensure the **856 – URL Authority** Tag has been defined, and that there is **$u** and **$z** Subfields:

1. Launch the *Amlib* client
2. Go to **Main** > **Authorities** > **MarcTags** – the Marc Tags Within the System screen will display



3. Check to see if the **856 | Electronic location and access** Tag is in the list of Tags (it may be also be called **979 | URL Link**)
4. If it is NOT present, then you can add one as follows:
    a. Click the **F1 New** button
    b. Fill in the fields as shown in the table below

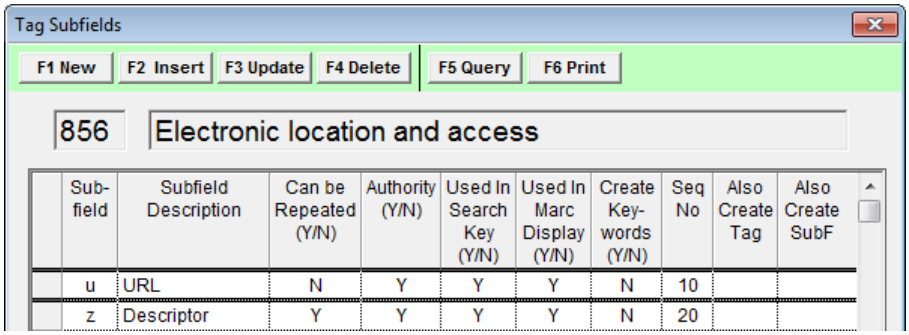
HEADING	DETAILS
Tag No	**856**
Tag Description	**Electronic location and access**
Default Ind 1	<leave blank>
Default Ind 2	<leave blank>
Can the Tag be Repeated in a Catalogue (Y/N)	**Y**
Is the Tag an Authority that is only used in 1 Catalogue (Y/N)	**N**
Keyword Search Code	<leave blank>
Default Catalogue Show Sequence	**85600**
Allow Tag Xrefs with these comma sep list	**856**

c. Click the **F3 Update** button to save the Tag definitions

5. You will also need to check/create Subfields for the **856** Tag:

a. Highlight the **856** Tag

b. Click the **F7 SubF** button – the Tag Subfields table will display:



c. Add the (**$u**) and (**$z**) Subfields as shown in the table below

HEADING	DETAILS	
Subfield	**u**	**z**
Subfield Description	**URL**	**Descriptor**
Can be Repeated (Y/N)	**N**	**Y**
Used in Search Key (Y/N)	**Y**	**Y**
Used in Marc Display (Y/N)	**Y**	**Y**
Create Keywords	**N**	**N**
Seq No	**10**	**20**
Also Create Tag	<leave blank>	<leave blank>
Also Create SubF	<leave blank>	<leave blank>

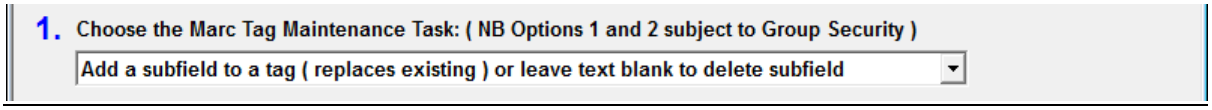
d. Click the **F3 Update** button when complete

The **856** Tag has now been configured.

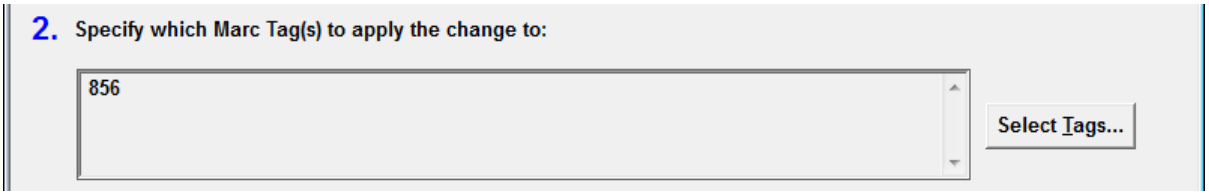
Add the Link Text

If you already have URLs in your catalogue records, you can mass add a description to them all.

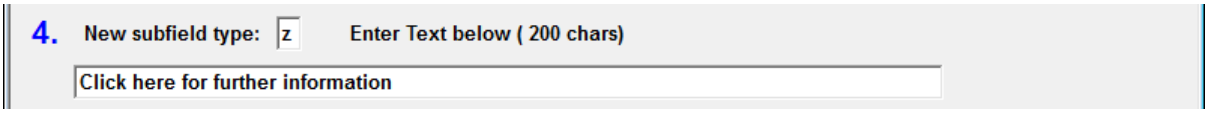
1. Go to **Main** > **Authorities** > **MarcTagMaintenance** – the Marc Tag Maintenance screen will display
2. Enter the following settings:
    a. 1. Choose the Marc Tag Maintenance Task: drop-down, select: **Add a subfield to a tag (replaces existing) or leave text blank to delete a subfield**



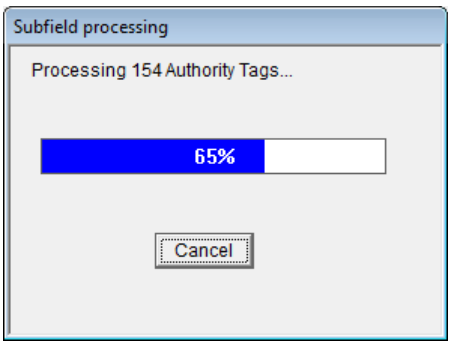
    b. 2. Specify which Marc Tags(s) to apply the change to: click on the **Select Tags...** button, select the **856 | URL** Link Tag and then click the **OK** button



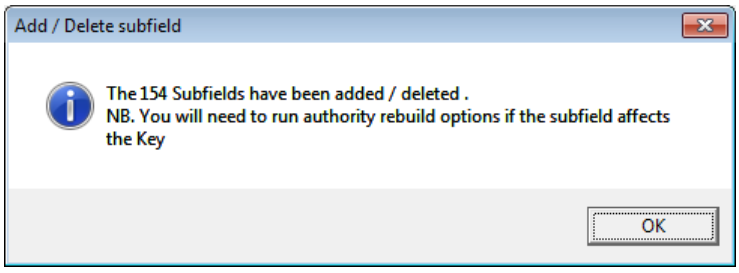
    c. 3. Select other options relating to the maintenance task: - leave blank (to apply to all Tags) or click the **Options**... button to apply the change to a previously created Authorities Saved Query Results File
    d. 4. New subfield type = **z**
    e. Enter text below = type in the text that you want to be displayed in the NetOpacs for the link – for example: **Click here for further information**



3. Click the **F3 Start** button to run the maintenance
4. The selected Tags will then processed:



5. Once complete, a prompt with the following message will display:
The XXX Subfields have been added / deleted.

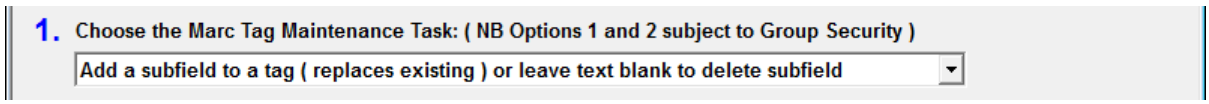


6. Click the **OK** button

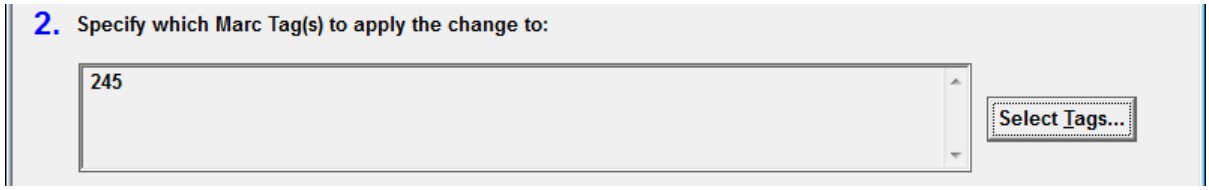
Remove a Subfield

It is also possible to remove a Subfield from a nominated Authority Tag. For example: remove the Responsibility data from the **245 | Title Statement** Tag (Subfield **c**).

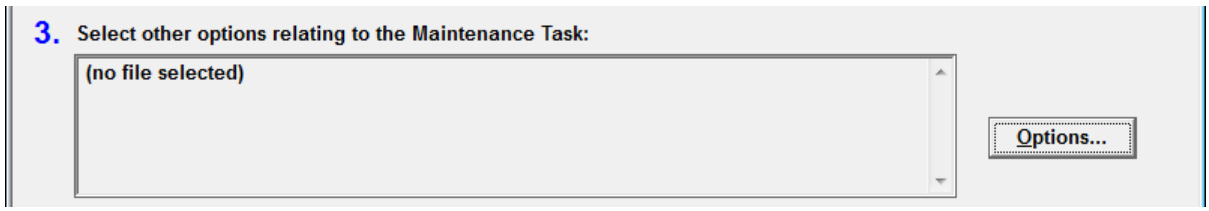
1. Enter the following settings:
    a. 1. Choose the Marc Tag Maintenance Task: drop-down, select: **Add a subfield to a tag (replaces existing) or leave text blank to delete a subfield**



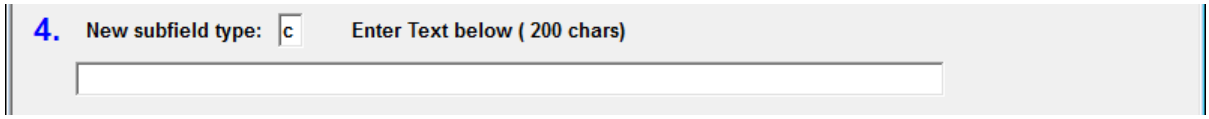
    b. 2. Specify which Marc Tags(s) to apply the change to: click on the **Select Tags...** button, select the Tag (for example: **245 | Title Statement**) and then click the **OK** button



    c. 3. Select other options relating to the maintenance task: leave blank (to apply to all Tags) or click the **Options**... button to apply the change to a previously created Authorities Saved Query Results File

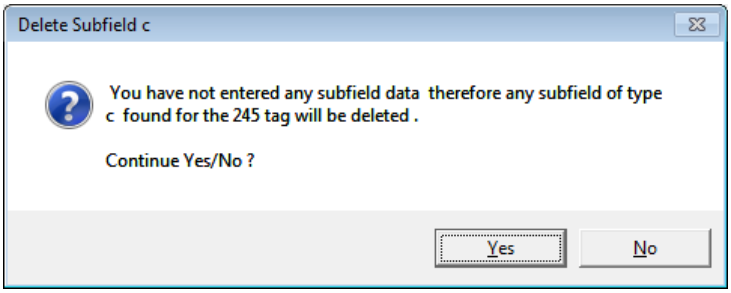


    d. 4. New subfield type = enter the Subfield – for example: **c**
    e. Enter text below = ***enter no text in the box*** (if no data is added , the existing Subfield will be deleted)

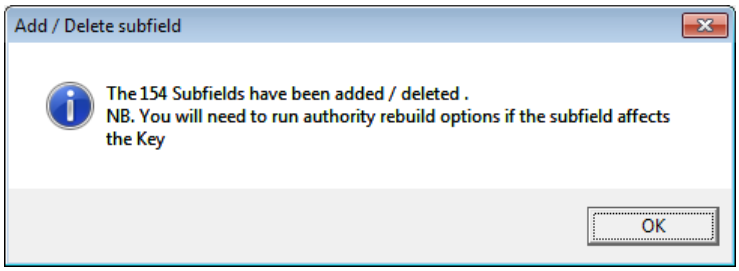


2. Click the **F3 Start** button – a prompt with the following message will display:
You have not entered any subfield data therefore any subfield of type c found for the XXX

tag will be deleted.
Continue Yes/No?



3. Click the **Yes** button to proceed – once the process is completed, a prompt with the following message will display: **The XXX Subfields have been added / deleted.**
The XXX Authorities have been processed and XXX Authorities have been deleted.



4. Click the **OK** button

Rebuilding an Authority Key

If an Authority parameter is altered, the Authorities already on the system will not be altered to the new parameter. By running this option, the Authorities will be refreshed according to the new parameters.

This option also allows for the Catalogue and Stockitem displays to be updated.

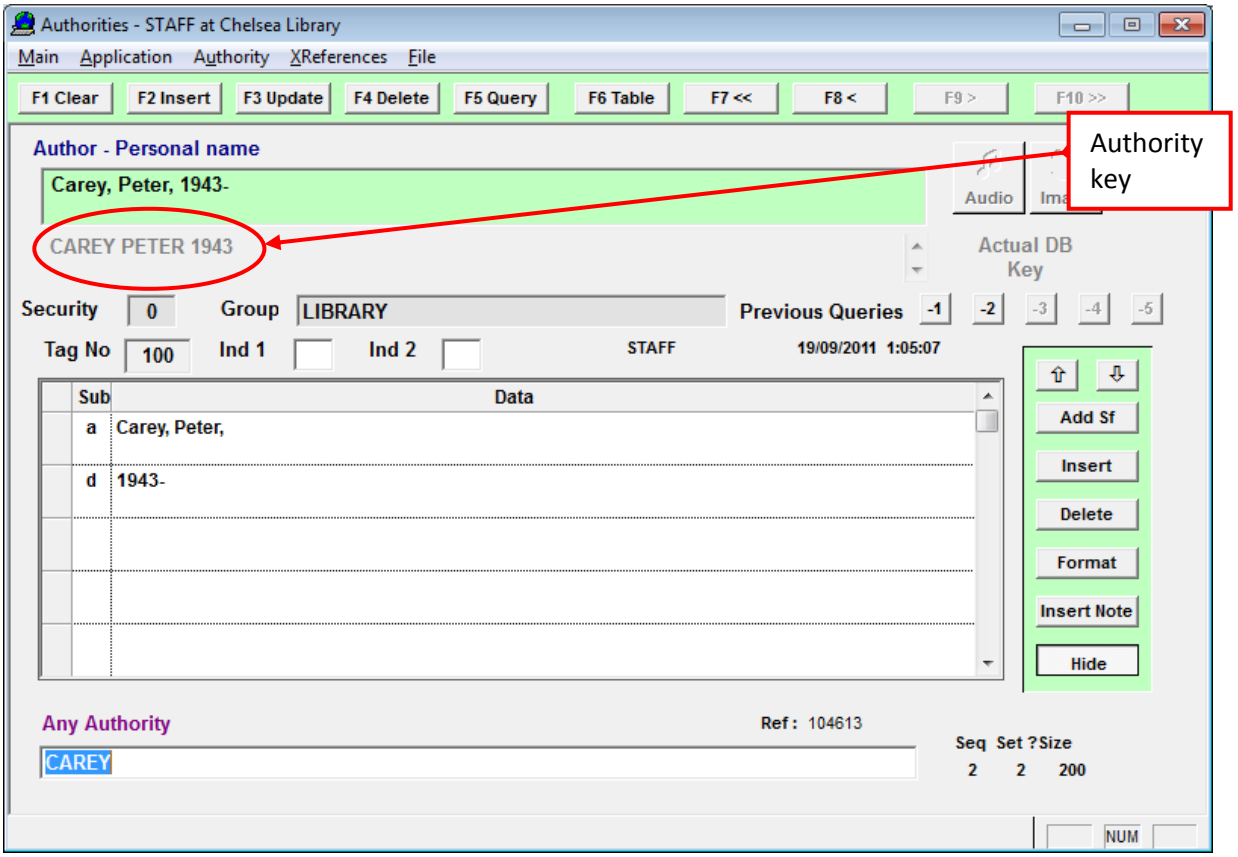
Please Note: This function MUST only be completed when all users are off the system, including *NetOpacs* as rebuilds can take a long time to complete.

What is the Authority Key?

An Authority Key is the actual Database Key. It is how the Authority is stored by *Amlib* in the database. It is used for searching purposes within *Amlib*.

- You can see an example of the current Authority Key by going to **Main** > **Supervisor** > **Authorities** and searching for an authority – for example: **Peter Carey**

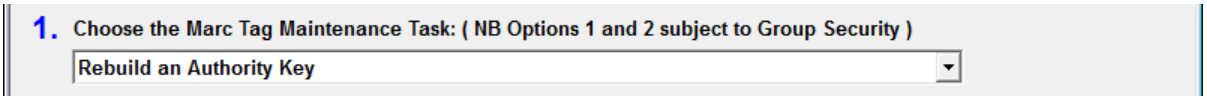
- The Authority Key appears in **GREY BOLD** text below:



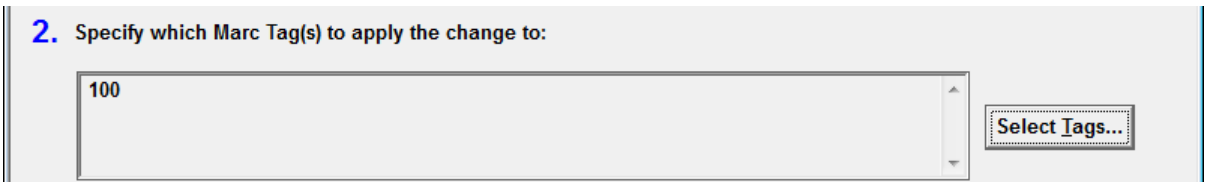
Rebuild the Authority Key

This example uses the situation where we have removed the associated dates (**$d**) from being used in the Search Key in Marc Tag Subfields and need to refresh the **100 | Authors – Personal Name** Tags to remove dates from the Authority Key.

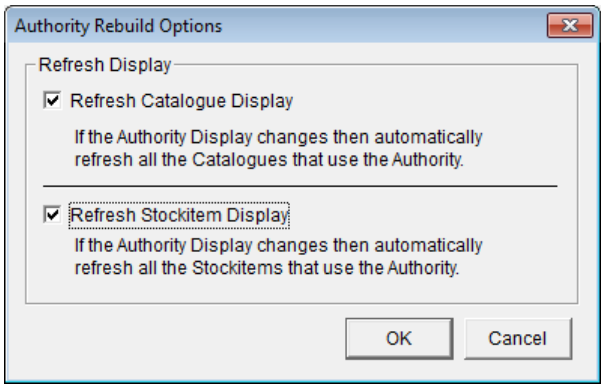
1. Enter the following settings:
    a. 1. Choose the Marc Tag Maintenance Task: drop-down, select: **Add a subfield to a tag (replaces existing) or leave text blank to delete a subfield**



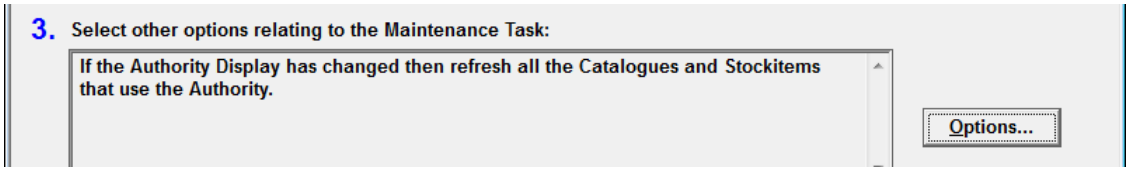
    b. 2. Specify which Marc Tags(s) to apply the change to: click on the **Select Tags...** button, select the Tag (for example: **100 | Author – Personal Name**) and then click the **OK** button



    c. 3. Select other options relating to the maintenance task: click the **Options**... button – the Authority Rebuild Options prompt will display:

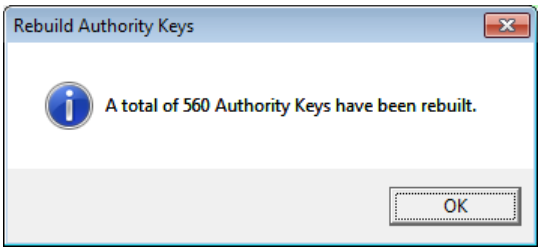


d. **Tick** both the Refresh Catalogue Display and Refresh Stockitem Display options and click the **OK** button



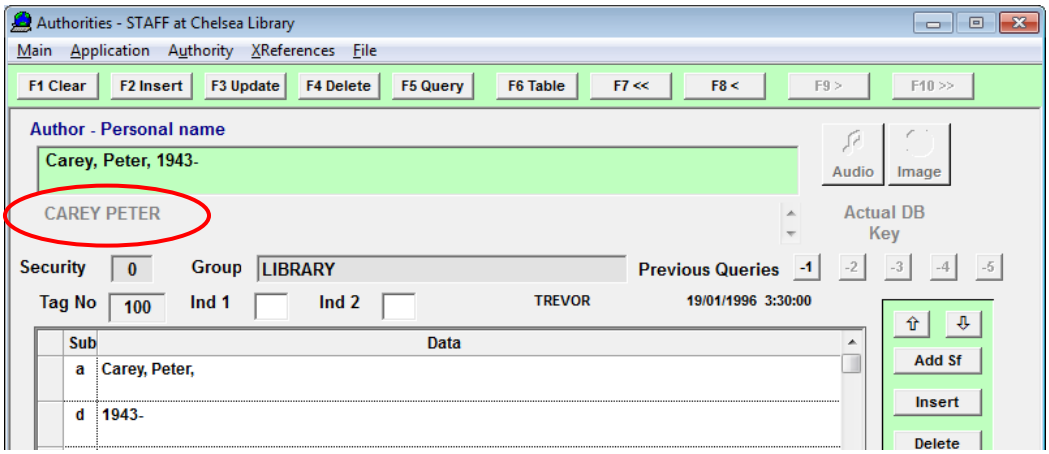
e. The 4. New subfield type box will be ***greyed*** out

2. Click the **F3 Start** button – once the process is completed, a prompt with the following message will display: **A total of XXX Authority Keys have been rebuilt.**



3. Click the **OK** button

Example Authority after the Rebuild:

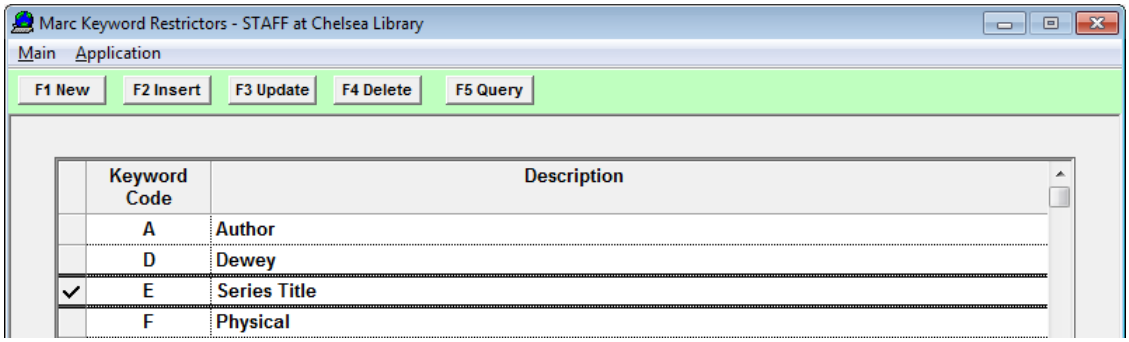


Rebuild the Keywords

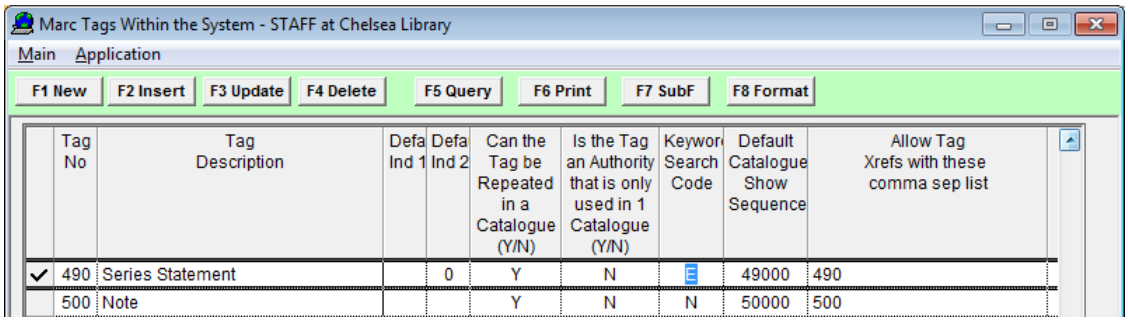
If the search settings for a Marc Tag are changed, the existing Keywords on the system are not automatically altered to reflect the new parameter(s). By running this option, the Keywords will be rebuilt according to the new parameters.

There are generally three (3) causes for this:

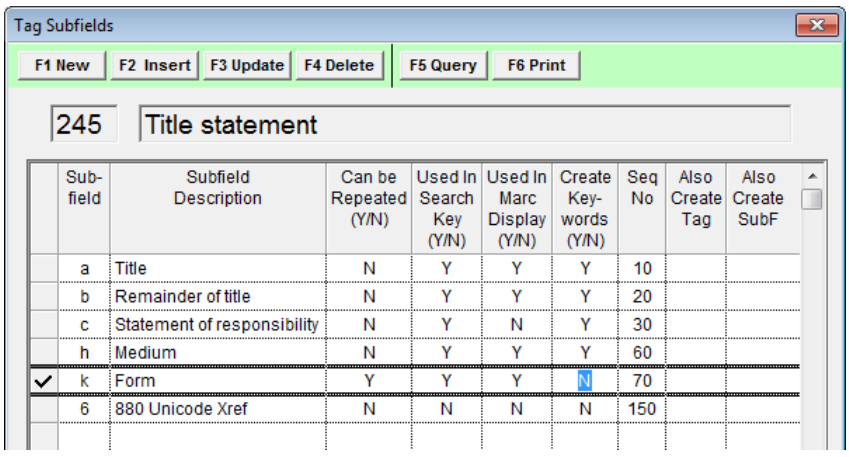
- If an existing Keyword Restrictor Code (**Application** > **KeywordDesc**) is changed – for example: the Keyword Restrictor Code for Series is changed from **G** to **E**



- If the Keyword Restrictor Code (**Application** > **KeywordDesc**) assigned to an existing Marc Tag is changed – for example: the Keyword Restrictor Code for the **490 | Series Statement** Tag is changed from **T** to **E**



- If the Create Keywords (Y/N) column (**Main** > **Authorities** > **MarcTags** – select Tag > **F7 SubF**) setting for a Tag Subfield is changed – for example: if the **245$k** Subfield Create Keywords (Y/N) setting is changed from **Y** to **N**

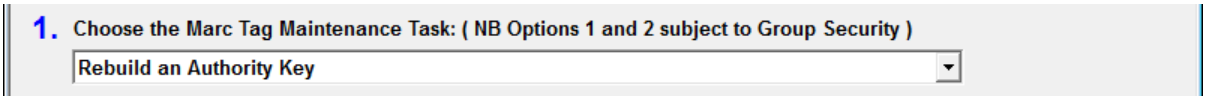


Please Note: This function MUST only be completed when all users are off the system, including *NetOpacs*, as rebuilds can take a long time to complete.

1. Enter the following settings:
    a. 1. Choose the Marc Tag Maintenance Task: drop-down, select:
        i. **Rebuild the keywords for an Authority** (the keywords for Authority Tags/Subfields will be refreshed according to the new parameters)

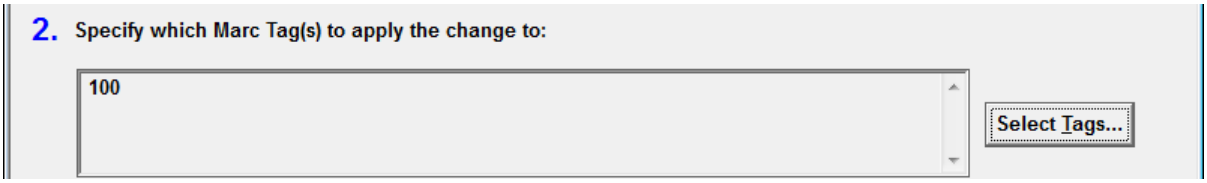
ii. **Rebuild the keywords for a Non-Authority** (the keywords for Non-Authority Tags/Subfields will be refreshed according to the new parameters)

iii. **Rebuild all the keywords** (the keywords for all Tags will be refreshed according to the new parameters)



b. 2. Specify which Marc Tags(s) to apply the change to: click on the **Select Tags...** button, select the Tag(s) – to select all Tags click the **Select All** button – and then click the **OK** button

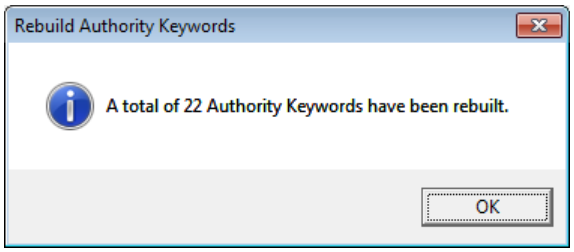
i. If the user selected **Rebuild all the keywords** then the process is designed to refresh all tags (it will not be possible to only choose a few Tags)



c. The 3. Select other options relating to the maintenance task box will be ***greyed*** out

d. The 4. New subfield type box will be ***greyed*** out

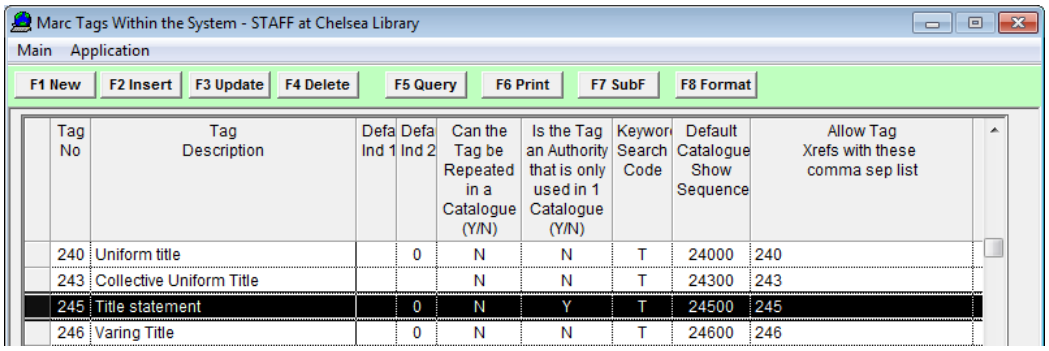
2. Click the **F3 Start** button – once the process is completed, a prompt with the following message will display: **A total of XXX Authority/Non-Authority Keywords have been rebuilt.**



3. Click the **OK** button

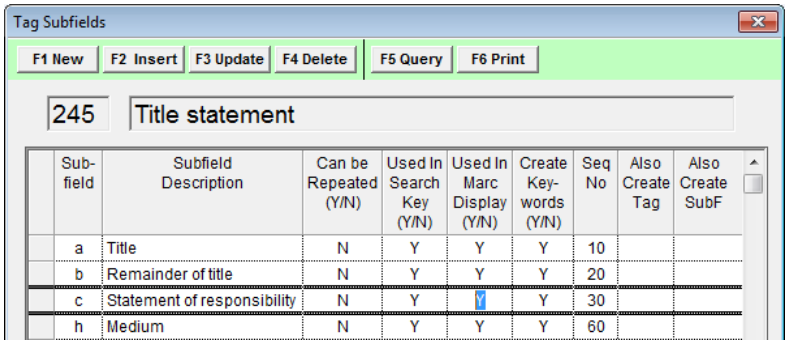
Appendix 3: Taking Off the Responsibility in Title

1. Launch the *Amlib* client
2. Go to **Main** > **Authorities** > **MarcTags** – the Marc Tags Within the System screen will display:



Tag No	Tag Description	Defa Ind 1	Defa Ind 2	Can the Tag be Repeated in a Catalogue (Y/N)	Is the Tag an Authority that is only used in 1 Catalogue (Y/N)	Keywor Search Code	Default Catalogue Show Sequence	Allow Tag Xrefs with these comma sep list
240	Uniform title		0	N	N	T	24000	240
243	Collective Uniform Title			N	N	T	24300	243
245	Title statement		0	N	Y	T	24500	245
246	Varing Title		0	N	N	T	24600	246

3. Select (highlight) the **245 | Title statement** Tag and click the **F7 SubF** button – the Tag Subfields screen will display:

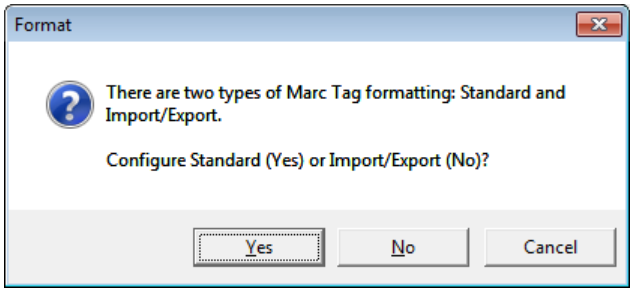


Sub-field	Subfield Description	Can be Repeated (Y/N)	Used In Search Key (Y/N)	Used In Marc Display (Y/N)	Create Key-words (Y/N)	Seq No	Also Create Tag	Also Create SubF
a	Title	N	Y	Y	Y	10		
b	Remainder of title	N	Y	Y	Y	20		
c	Statement of responsibility	N	Y	Y	Y	30		
h	Medium	N	Y	Y	Y	60		

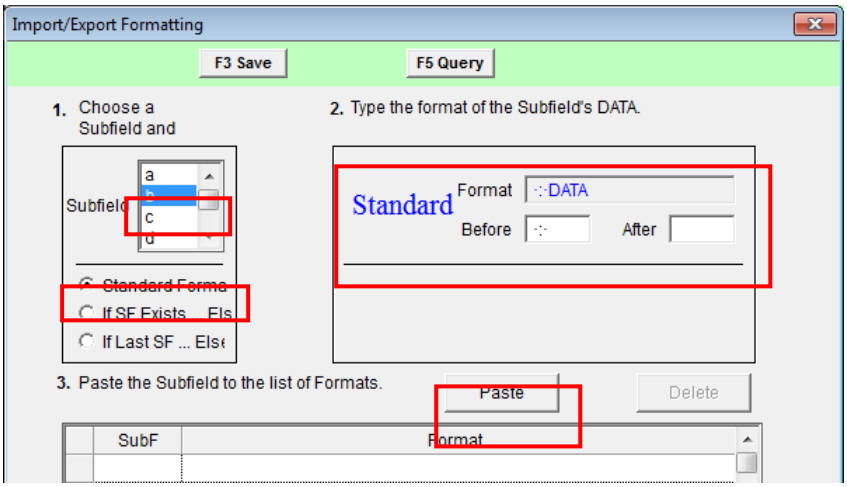
4. Select the **C | Statement of responsibility** Subfield
5. In the Used In Marc Display (Y/N) column –change the **Y** to **N**
6. Click the **F3 Update** button when complete
7. Close the Tag Subfields screen by clicking on the red **[X]**

To ensure the Title ends with a full stop (**.**) rather than a slash (**/**), it is possible to apply some formatting rules.

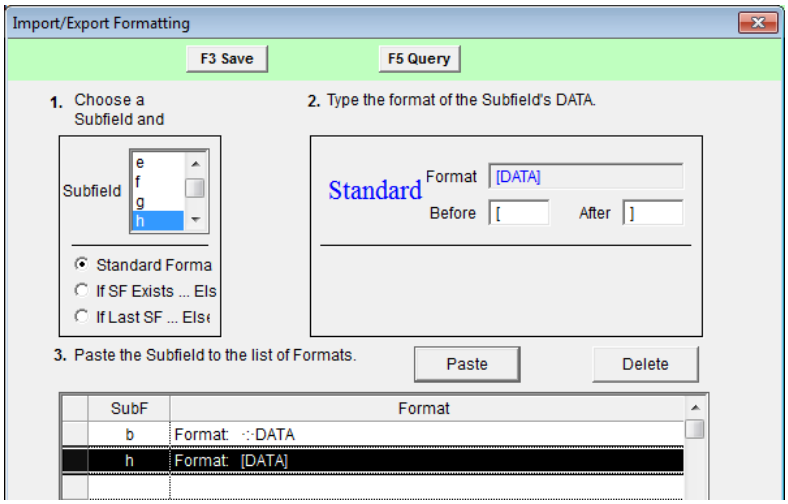
1. Select (highlight) the **245 | Title statement** Tag and click the **F8 Format** button – a prompt will display with the following message:
   There are two types of Marc Tag formatting: Standard and Import/Export.
   Configure Standard (Yes) or Import/Export (No)



2. Click the **No** button to choose the *Import/Export* format – the Import/Export Formatting screen will display:

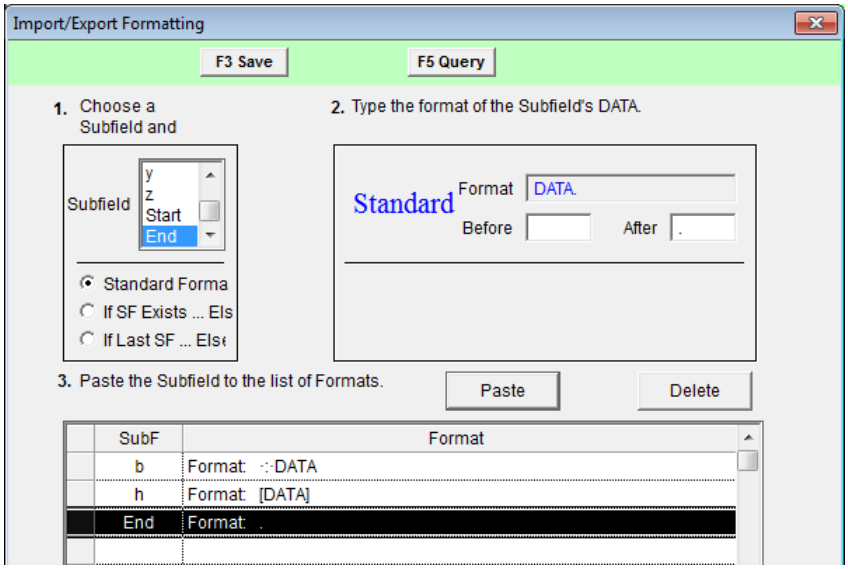


3. In box 1. Choose a Subfield and
    a. Select **b** in the Subfield box
    b. Select **Standard Format** from the list of options underneath
4. In box 2. Type the format of the Subfield's DATA
    a. In the Before box type: **<space>:<space>** (**:**)
    b. How the Punctuation will display in relation to the **DATA** can be seen in the Format field
5. Once the Format is correct, click the **Paste** button – the formatted **$b** Subfield will be added to the table at the bottom of the screen
6. In box 1. Choose a Subfield and
    a. Select **H** in the Subfield box
    b. Select **Standard Format** from the list of options underneath
7. In box 2. Type the format of the Subfield's DATA
    a. In the Before box type: **[** and in the After box type: **]**
8. Once the Format is correct, click the **Paste** button – the formatted **$h** Subfield will be added to the table at the bottom of the screen:



9. In box 1. Choose a Subfield and
    a. Select **End** in the Subfield box
    b. Select **Standard Format** from the list of options underneath

10. In box 2. Type the format of the Subfield's DATA
    a. In the After box type: <full stop> (.)
11. Once the Format is correct, click the **Paste** button – the formatted **$h** Subfield will be added to the table at the bottom of the screen:



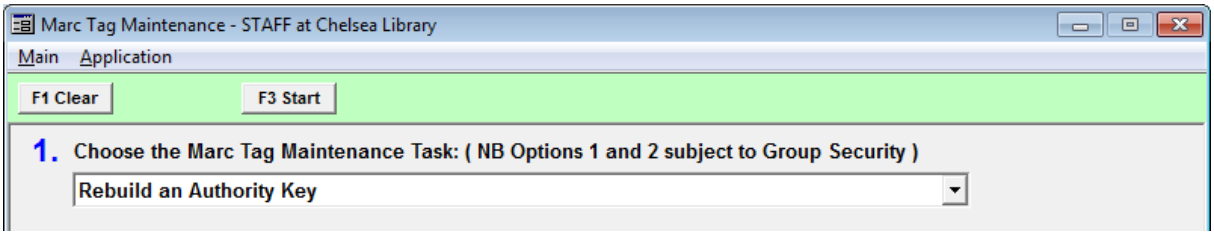
12. Click the **F3 Save** button when complete

This will change the format for all new titles created.

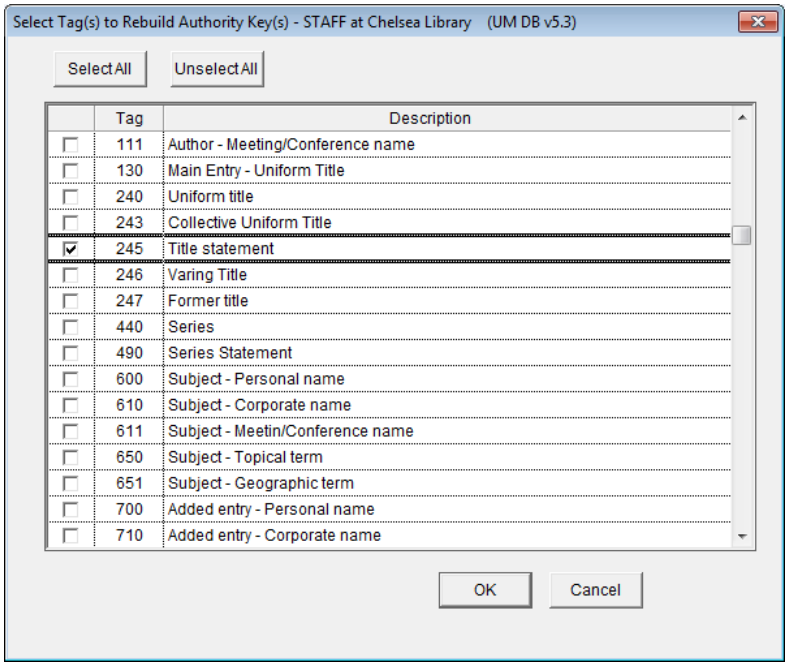
Changing Your Existing Data – Responsibility Tag in 245

To change your existing data, you will need to use the Authority Marc Tag Maintenance to Rebuild Marc Display.

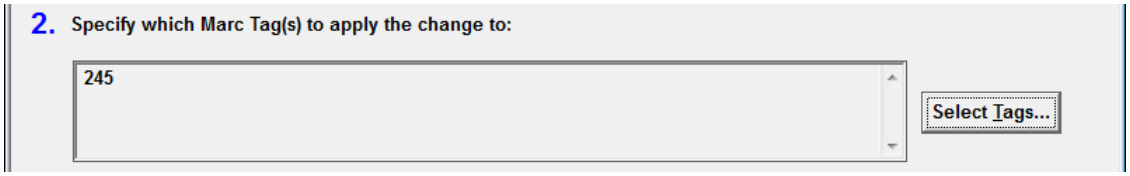
1. Go to **Main** > **Authorities** > **MarcTagMaintenance** – the Marc Tag Maintenance screen will display
2. From box 1 select: **Rebuild an Authority Key**



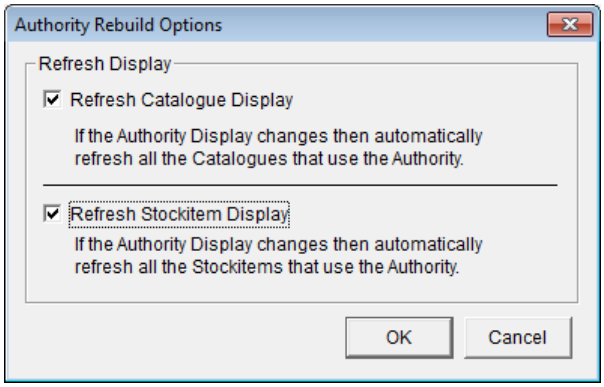
3. Click the **Select Tags...** button next to box 2 – the Select Tag(s) to Rebuild Authority Key(s) screen will display:



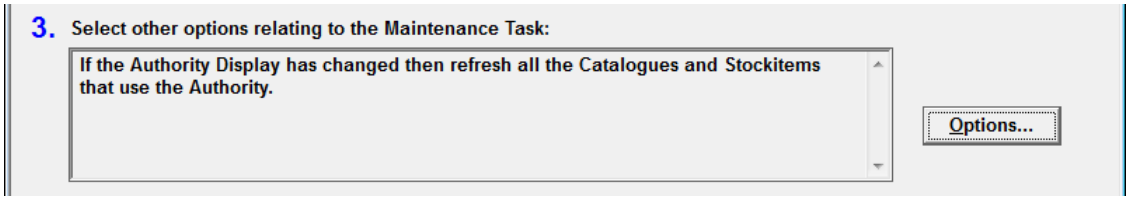
4. Scroll down and tick the **245 | Title statement** Tag and click the **OK** button



5. Click the **Options** button next to box 3 – the Authority Rebuild Options prompt will display:

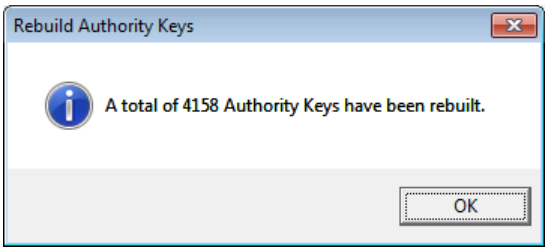


6. Ensure that both the **Refresh Catalogue Display** and **Refresh Stockitem Display** options are selected and click the **OK** button



7. Click the **F3 Start** button – the Authority Keys will be rebuilt:

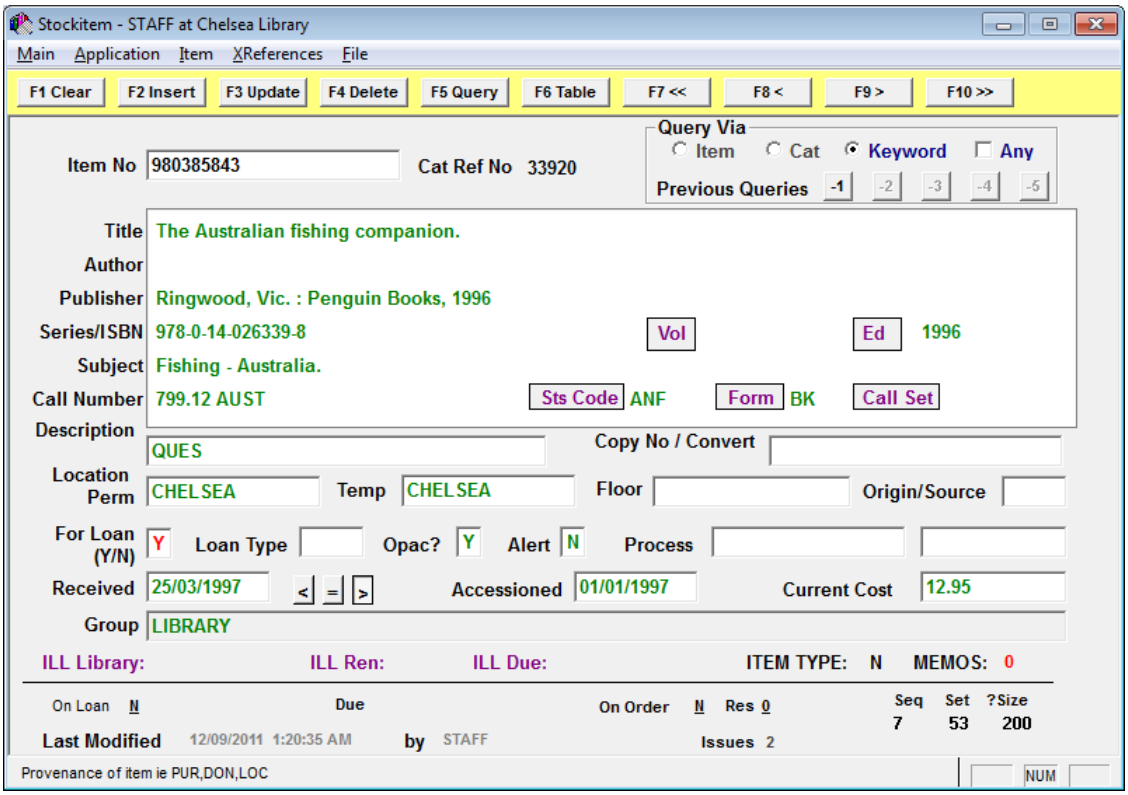
8. A prompt with the following message will display once complete: **A total of XXX Authority Keys have been rebuilt.**



9. Click the **OK** button

The rebuild is complete.

The Titles in the Catalog and Stockitem screens will be ended with a full stop rather than the slash:



Appendix 4: USMARC

MARC is an acronym for **MA**chine **R**eadable **Catalogue**. USMARC was developed by *the Library of Congress* and was formerly named LC MARC.

Amlib uses USMARC because:

- It is now the international standard for cataloguing
- Each record is written in a format that can easily be read, retrieved and manipulated by a computer
- As the data contains consistent "signposts", computers can read and interpret records so that the Bibliographic data can be inserted correctly into any software in any country of the World. That is, the "signposts" are written for machines, not for people so there is no problem with different languages, etc.
- Using this standard enables better sharing of data between libraries and compatibility with outside agencies – for example: *ABN*, *SL of WA*, *SCIS*
- The format is compact, taking less storage space to hold data than a text-based system

Sample MARC Record

00491nam 2200181 a
4500001000700000005001700007007000300024008004100027020001500068040001100083082001600094100002300110245004500133260003800178300001100216650004800227650003400275-985170-19990927105630.0-t -990923s1999 at 000 1 eng d- a0140279083- aN.S.W.-14aFbMET2a13-1 aMetzenthen, David.-10aStony heart country /cDavid Metzenthen.- aRingwood, Vic. :bPenguin,c1999.- a208 p.-07aCountry lifezAustraliaxFiction.2scisshl.-07aAustralian stories.2scisshl.-

↓

00491nam 2200181 a
4500**001***0007*00000**005***0017*00007**007***0003*00024**008***0041*00027**020***0015*00068**040***0011*00083**082***0016*00094**100***0023*00110**245***0045*00133**260***0038*00178**300***0011*00216**650***0048*00227**650***0034*00275-985170-19990927105630.0-t -990923s1999 at 000 1 eng d- a0140279083- aN.S.W.-14aFbMET2a13-1 aMetzenthen, David.-10aStony heart country /cDavid Metzenthen.- aRingwood, Vic. :bPenguin,c1999.- a208 p.-07aCountry lifezAustraliaxFiction.2scisshl.-07aAustralian stories.2scisshl.-

- First 24 positions, *ending with* **4500.**: Leader
- Tag directories: 12 characters long
- Each Tag directory composed as follows: Tag No –for example: **100**, length of field – for example: *0023*, starting point of this field – for example: 00110
- Each Marc record can consist of "signposts" that Tags, Indicators and Subfields. The Tag, Indicator and Subfield makes up each Field of the Marc record.

Tags

Each data field is identified by a 3-digit number. In *Amlib* the Tag is often associated with a Description. For example: Tag **245** is always **Title** and Tag **260** is always **Publisher**.

Tag "Families"

TAG	DESCRIPTION
000s	Control fields, number and codes
100s	Main entries – usually author
200s	Title and Title related fields
300s	Physical description
400s	Series related fields
500s	Notes
600s	Subject related fields
700s	Added entries – other than Subject or Series
800s	Series added entries
900s	Locally defined entries. For example holdings information (often used in conversions)

Even though there are hundreds of Marc Tags, only 10% are used commonly.

Indicators

Each indicator is identified by a number between **0** to **9** (letters can be used but are not common). The numbers often are an indication as to how to "treat" text or categorise a Tag.

For example: the 2nd indicator for title indicates the number of non-filing characters to ignore, including spaces. In the **245 | Title statement** Tag example shown below (see Appendix 5: USMARC – Some Common Tags), the 2nd indicator shows **4**, to ignore **The_** so that filing begins with the letter **Q** in **Quasar**. Usually *Amlib* sorts out the filing of these characters for us – we do not usually have to enter data in these columns when manually entering items.

The 1st indicator in the **600 | Subject – Personal Name** entry indicates the type of entry (for example: **1** Surname, **3** Family name). Therefore, most would have a **1** as the first indicator.

- See: http://www.itsmarc.com/crs/bib1468.htm for specific information about configuring the indicators for each tag

Parallel Content

The **100**s, **400**s, **600**s, **700**s and **800** Tags usually follow the following numbering to maintain consistency.

TAG	DESCRIPTION
X00	Personal Names
X10s	Corporate Names
X11	Meeting Names
X30	Uniform Titles
X40	Bibliographic titles
X50	Topical Terms
X51	Geographic names

Therefore **610** would be **Subject Heading, Corporate name** and **110** would be **Author, Corporate name**.

Subfields

A lower-case letter or occasionally a number identifies each Subfield. In general, if you are using a Tag, it MUST contain a Subfield **a**. Publication data is an exception to this rule.

Some useful MARC sources:

- **Library of Congress Home Page** – Marc Standards – Understanding Marc Bibliographic: http://www.loc.gov/marc/ and listing of Tags under Bibliography in the left hand index
- **Ending Punctuation for Marc Tags** webpage: http://www.itcompany.com/inforetriever/punctuation.htm
- **Follett Software "Tag of the Month**":
- http://www.follettsoftware.com/tagofthemonth.cfm
- **Schools Catalogue Information Service**
- http://www1.curriculum.edu.au/scis
    - Connections newsletters
    - Standards
    - Source of Authority data for schools

Appendix 5: USMARC – Some Common Tags

There are literally hundreds of MARC Tags that can be used. However only about 10% of these are commonly used.

COMMON TAGS	**IND** **1 2**	**Subfields** Many of these Subfield will never be used. In most cases a Tag MUST have a Subfield a. (**R**) indicates Repeatable Subfields. All others are (**NR**) Non-Repeatable		
001 **Control Number** Assigned by the organisation creating or distributing the record		Contains no Subfield codes for example: **SL OF WA Innopac Number** (8 characters)		
		1367061X		
020 **ISBN** (R) *Indicators undefined*	**0 0**	**a** *Subfield most often used ISBN	**c** Terms of Availability	**z** Cancelled or Invalid (R)
		0732248493	**$14.50**	**0397318487**
022 **ISSN** Periodicals often have an ISSN*Indicators undefined*	**0 0**	**a** ISSN		
		1077-7199		
082 **Dewey No.** (R) *Ind 1: Type of edition e.g. 0 Full edition* *Ind 2: Source of call no e.g. 4 SCIS*	**0 0**	**a** Base Number	**b** Item Note	
		523.8	**SMI**	
099 ***SL of WA* Call No.**	**0 0**	**f** Size Prefix and/or the **J** prefix (for Junior NF)	**a** *SL of WA* Classification	**b** Author Prefix
		Q or **QJ**	**591.994**	**SMI**
			F	**SMI**

100 **Author – Personal Name** (NR) (usually main author) *Ind 1: Type of personal name entry element e.g.1 Surname* *Ind 2: Undefined*	**0**	**0**	**a** Personal Name	**q** Qualifier (Full name)	**b** Roman numeral	**d** Dates	**c** Qualifier (R)			
			Asimov, Isaac L.	**(Isaac Leo),**	**XV**	**1920-**	**Dr**			
245 **Title Statement** (NR) *Ind 1: Title added entry e.g.0 No title added entry* *Ind 2: Non Filing characters e.g. 4 Miss 4 characters when filing e.g. For the word "The "*	**0**	**4**	**a** Title proper	**b** Other title information (remainder)	**h** Medium	**l** Parallel Title	**c** First Statement	**n** Volume Number (R)	**p** Volume Title (R)	**f** Second Statement
			The Quasars, pulsars, and black holes of space :	**a study**	**[sound recording]**	**Canto por las palams**	**/Isaac Asimov**	**Book 4**	**Taxonomy**	**Pictures by El Stymes.**
260 **Publication information** (NR) *Indicators undefined*	**0**	**0**	**a** Place of Publication or Distribution (R)	**b** Name of publisher/ distributor (R)	**c** Date of Publication (R)					
			Sydney :	**Collins,**	**1988.**					
300 **Physical description** (R) *Indicators undefined*	**0**	**0**	**a** Extent (R)	**b** Illustration Statement	**c** Size (R)	**e** Other material				
			38p. :	**Ill. (col.), maps. ;**	**13cm.**	**1 teacher's guide.**				
490 **Series Statement** (R) *Ind 1: Undefined* *Ind 2: Non Filing characters e.g. 4 Miss 4 characters when filing e.g. For the word "The*	0	0	**a** Series Title	**x** ISSN	**v** Numbering					
			Isaac Asomov's library of the Universe	**0077-8923**	**No.34**					

500 **General Notes** (R) *Indicators undefined*	**0**	**0**	**a** General Note Includes glossary								
520 **Summary** (R) *Ind 1: Display constant controller e.g. 1 Review* *Ind 2: Undefined*	**0**	**0**	**a** Summary Notes **Contains information on several of marine life. Keywords: fish, anemones, octopus, crayfish**								
600 **Subject –Personal Name** (R) *Ind 1: Type of personal name e.g. 1 Surname* *Ind 2: Source of Heading e.g. 0 Library of Congress*	**1**	**0**	**a** Entry element **Leakey, L.S.B.**	**q** Qualifier (full name) **(Louis Seymour Bazett)**	**t** Title of a work **Sea songs**	**c** Qualifier – Titles ass. (R) **King of France**	**d** Dates **1903-1972**	**v** Form Subdivision (R) **Biography**	**x** General Subdivision (R) **Drama**	**y** Period Subdivision (R) **To 1970**	**z** Place Subdivision (R) **United States**
650 **Subject – Topical Term** (R) *Ind 1: Blank* *Ind 2: Source of Heading e.g. 0 Library of Congress*			**a** Entry Element **Astronomy**	**v** Form Subdivision (R) **Dictionaries**	**x** General subdivision (R) **Fiction**	**y** Period Subdivision (R) **19th Century**	**z** Place Subdivision (R) **Western Australia**				
651 **Subject – Geographic Term** (R) *Ind 1: Undefined* *Ind 2: Source of Heading e.g. 0 Library of Congress*			**a** Entry Element **Australia**	**v** Form Subdivision (R) **Dictionaries**	**x** Subject or Form subdivision (R) **History**	**y** Period Subdivision (R) **1800-1899**	**z** Place Subdivision (R) **Kimberley**				

700 **Added Entry – Personal Name** (R) Usually other authors *Ind 1: Type of personal name entry element e.g.1 Surname* *Ind 2: Type of added entry # No information provided*			**a** Entry	**c** Additions to name (R)	**q** Fuller form	**d** Dates	**t** Title element
			Kick, M. A.	**Dr**	**(Marion Anne)**	**1901-1975-**	**Works**
856 **Electronic location and access**			**u** Uniform Resource Locator (URL)	**z** Descriptor (Link Text)			
			http://amlib.net.au	**Click here to link to web site**			
945 **Item Area**			**a** SL OF WA classification No Only present if different to Tag 99	**b** SL OF WA author Only present if different to Tag 99	**f** SL OF WA size prefix Only present if different to Tag 99	**i** Item barcode	**p** Item price
			421.1	**BAL**	**QJ**	**ASLIB4417531B**	**$21.00**

AOL Tags

COMMON TAGS AOL Data	IND 1	 2	Subfields
001 **Control Number** Assigned by the organisation creating or distributing the record			Contains no Subfield codes – for example: **SL OF WA Innopac Number** (8 chars)
			1367061X
956 **SL OF WA Category**	0	0	**a** Category **a =** NF**; f =** AF**; j =** JF**; k =** JK**; n =** JNF
			f
957 **SL OF WA Format** Field definition and scope			**a** Format **b =** Book; **h** = Hardback; **p** = Paperback; **l** = Large Print; **c** = Cassette; **v** = VHS; **r** = CD ROM; **s** = Serial; **n** = Newspaper; **m** = Microfiche; **u** = Map; **f** = Film; **i** = Infomat; **e** = Music Score
			b