



Library Resource Management Systems, Inc.

How to enter a book manually:

The library program does contain alternate methods for adding new materials to the library catalog. Manual entry is always an option when an item cannot be found using alternate methods. Cataloging features are affected by the Build/Version of your Library program and Internet connectivity to the library workstation.

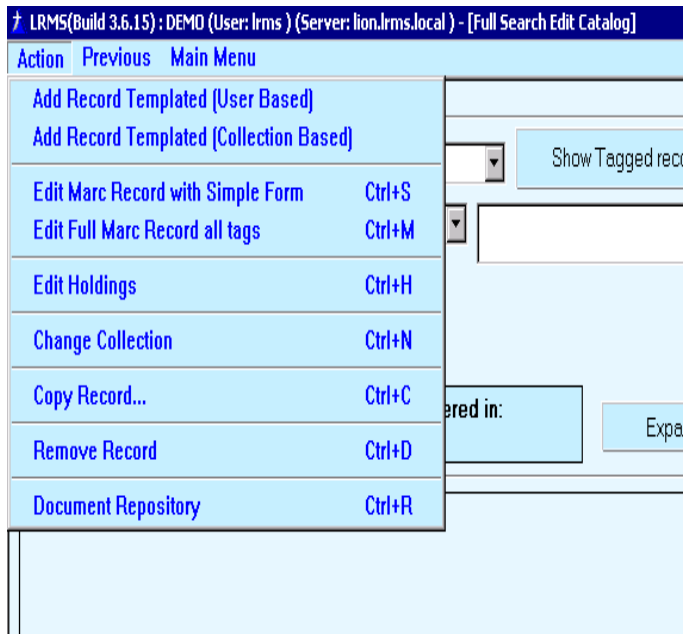
Some Alternate options that are within the Catalog Menu:

- ✓ [Pick and Pull – Free MARC](#) (a great way to improve a MARC record lacking a lot of detail)
- ✓ [Easy ISBN Cataloging with Z39.50 MARC Match](#) (easiest way to add MARC Records)

Manual Entry:

Step 1: Begin using the Back-Office Main Menu and select Catalog Management, then choose Search/Edit Catalog.

Step 2: Select the Collection that items will be added too, Click on [Action button], at the top left of this screen. next Add Record Templated (User Based) or (Collection Based). We suggest User Based; the program may require settings to be added if the Collection and Cataloging Template has not been set-up. If necessary, pick the appropriate template using the “Change Template Set Default” Form.





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Step 3: When the Select Template box appears, use the Default Book Template (other templates are available for cataloging different materials) be sure to place a Check mark within the Yellow highlighted Select this template for both User based and Collection based when ready click on [Select].

A screenshot of the "Select Template" dialog box. It has a title bar "Select Template". Below the title bar is a "Template" dropdown menu with "Default Book Template" selected. Below the dropdown is a yellow highlighted area containing the text "Select this template as my Default Template." and a checked checkbox labeled "My Default Template is currently: Default Book Template". Below this is a horizontal line and a text box containing the following text: "The default User Template is Unique to each user. When you enter Simple Edit by using Add Record Templated (User based) then the template you select here will be used for you only. For example, you may have DEFAULT BOOK TEMPLATE as your default template while another user may have EQUIPMENT template her/his selected default." At the bottom are two buttons: "Select" and "Cancel".

Step 4: When the "Change Collection Set Default" is used the "Select Collection" box appears, pick your Collection and determine whether to Check mark the "Make Default Collection" click on [OK] for Main Collection, unless you want your book to be in a different collection. If so, choose the appropriate collection.

A screenshot of the "Select Collection" dialog box. It has a title bar "Select Collection". Below the title bar is a "Collection" dropdown menu with "MAIN COLLECTION" selected. Below the dropdown is a checked checkbox labeled "Make Default Collection". At the bottom are two buttons: "OK" and "Cancel".

Step 5: The next screen will be the Book Form (Ex: Default Book Template) or whatever was chosen as the selection. Select or confirm the Collection that will have this item cataloged into, most items are added into the Main Collection. The library program can have and support multiple or Special Collections.



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Step 6: Fill in the fields (i.e., type the Full Call Number, ISBN, Title Description, Author, etc.).

Note: In the 100a Author field, type the Author's name as: last name first, comma, first name, the program will immediately open the Author Authority Lookup, add your Author into the blank field. The program will attempt a lookup, if your Author is found pick highlight the name and use the Select button to complete this entry, if not in the list insert the complete name using the Add Button. Add all the minimal entries, the program will create a MARC and Brief MARC record using the data you have entered when you Save. The fields highlighted in RED marked with ** indicates minimally required field information (see note at bottom of template)

✓ The fields highlighted in RED marked with ** indicates minimally required field information (see note at bottom of template).

The screenshot shows the 'Book Entry Form' with various fields. Callouts provide the following information:

- Field Requirements:** Fields marked with ** (e.g., 001, 010, 240, 260, 265, 300, 330, 440, 510, 520, 550, 560, 570, 580, 590, 650, 655, 656, 657, 658, 659, 660, 661, 662, 663, 664, 665, 666, 667, 668, 669, 670, 671, 672, 673, 674, 675, 676, 677, 678, 679, 680, 681, 682, 683, 684, 685, 686, 687, 688, 689, 690, 691, 692, 693, 694, 695, 696, 697, 698, 699, 700, 710, 720, 730, 740, 750, 760, 770, 780, 790, 800, 810, 820, 830, 840, 850, 860, 870, 880, 890, 900, 910, 920, 930, 940, 950, 960, 970, 980, 990) are minimally required.
- Author Authority Lookup:** A callout explains that the catalog form can have many different templates representing various types of materials to be cataloged (e.g., Books, Media, specialized materials for virtually any item that requires cataloging).
- Holdings:** A callout states: "Activate these two options, shown here in there Active state. Open Holdings after save is required as Holdings ties together the MARC record to the Bar code number label and costs and various codes that represent this item."

Step 7: When the fields are completed then click on [View] at the top left of the screen and click [Holdings]. Note: be sure your holdings codes include what is require to identify each of the following.

The screenshot shows the 'Edit Holdings' form with various fields. Callouts provide the following information:

- Field Requirements:** A callout states: "Simple to use, just fill in the appropriate fields. Be sure that your code fields are setup to represent what is needed."
- Multi-Add:** A callout states: "More than a single copy, use Multi-add to quickly and efficiently add multiple Cpies/holdings"

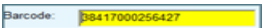


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- ✓ The Edit Holdings window appears, click on [Add New Holdings] or Change Holdings if modifying the cursor will move to the Barcode field if you select Auto Number Barcode? The program adds the next unused system number as a Bar code. Manual entry - type in your barcode number (for that book); you can scan the barcode number in if you have the barcode label. If not, you can just type the barcode number into the barcode field.

Continue filling out the remaining appropriate fields:

- ✓ Acquisition Date: (shows current day you can type over this date if necessary)
- ✓ Cost (add without a \$ sign; Ex: 10.00 or 10.) ☐ Circ Code: (0 zero is normally the default for regular circulated items, if different use the drop-down menu to select a different code)
- ✓ Loc Code: (can be the library location or room or shelf location)
- ✓ Vendor Code: (use the menu to add the description of the Vendor add additional through Maintain Holdings codes)
- ✓ Owner Code: (Who owns the item being cataloged, use the drop-down menu)
- ✓ Copy Status: A (for Available is automatically added) by default this code is applied to new entries automatically. The copy status "A" represents the item is Available and is ready for check-out. When an item is in circulation to a borrower "Never change" the Status code of O – Out within the Holdings as this code indicates the item is checked out.
 - When an item becomes lost, Items that become lost are managed through the Circulation Screen of the Borrower Account where Fines and Fees are entered.
- ✓ Fund Code: (where did the funds for purchases come from, this can be a number or text description. Use the drop-down menu to select codes.
 - Note: All of these fields are called your local information, so YOU must decide what goes in each field.

After you have these appropriate fields filled in, click on the [SAVE] button within this window. The program will present a 2nd. barcode highlighted in  yellow, if there is another copy to add do so, if not ignore that number and [SAVE] then [Exit].

Next The New Record is still being displayed and must be SAVED; select the File tab (upper left corner) and choose [Save and Close Template] the Record is Saved Successfully.

To complete this entry after saving the Record and Holdings

- Note: If you receive a [Authority Check], this means that you have entered either a Subject or Author that is not listed within the Subject or Author Authority tables in your program. What you will need to do is, click on the [Add] button within the Authority Check window to add your subject or Author to the table. If you do not get the box that says: [Authority Check], that means the Author and/or Subject entered is already in the Authority table and you do not have to add it.
- Final Note: If you want to look up the book you just entered in manually to make sure it is in your collection, while on the Catalog Search Screen (which is where you should still be after you have saved your book), choose Show last 5 Items entered button and you will see your new book entry in the list of 5. **Hooray, you did it!!**