

CATALOGING/ITEM MAINTENANCE TASKS		
Sierra	CARL•X	CARL•Connect Staff
Add bib records (from SkyRiver)	Contact Cat Help at OWLS	Contact Cat Help at OWLS
Add new magazine	Contact Cat Help at OWLS	Contact Cat Help at OWLS
Add item to a bib record	<ul style="list-style-type: none"> • Once you have “Selected Back” an item into Item Information, Click “New” • Select “Add a new item to this Bib record” • Click “OK” • Item Editor will display. Enter as much information as necessary • Click “Save” 	More soon
Add magazine issue	More soon	More soon
Add on-the-fly items	<ul style="list-style-type: none"> • While checking out in CARLX, a big, red box will appear if an item is not found • Enter as much information as possible or relevant in the fields in the box • Click “Create Temporary” 	<p>During check out, if an item scanned is not found, CARL Connect Staff will prompt a “Non-Overridable Error: this item cannot be borrowed because the item barcode is invalid or does not exist” box</p> <ul style="list-style-type: none"> • Click “Cancel” or the x to close the window • Open another browser tab and log in to Items • In the second search box you can Enter BID 887526, or go to bib search and search for “on the fly” <ul style="list-style-type: none"> ○ The first result in this list is a general on-the-fly record created for this purpose • Select back this record • In the item view, click “add an item” • Scan the barcode of the item on hand, and edit any other fields you wish

		<ul style="list-style-type: none"> • Click Save item. • Go back to the circulation browser and scan your new on the fly item
Add Volume Information	<ul style="list-style-type: none"> • While adding an item, pay close attention to the “Chronology/Enumeration” section • Click the three dots to enter the Issue Date. Even if your item is a graphic novel, Issue Date must be added. Select the publication date • Highlight the appropriate Radio Button and enter the appropriate information • Click “OK” • Enter descriptors into Enumeration for the issue • The first box should be “v” or “n” or “p” (or some other way to identify which part the item is) • Enter the volume number in the second box • If the item is broken down more than that, continue with enumeration <p>**Issue-level holds pull directly from this information, so the system-wide process will need to be standardized to achieve successful holds fulfillment. More to come.</p>	More soon
Create a Temporary Record	More soon	More soon
Editing an Item	<ul style="list-style-type: none"> • Start from an Item Search results list • Highlight the item in the grid • Click “Edit” • Item Editor will open • Make changes • Click “Save” 	More soon

	<p>*Multiple items can be chosen for editing by click <CTRL> and clicking each item. The first item will appear in Item Editor. Once changes are saved, the next item in the list is displayed.</p>	
Delete an item from a bib record	<ul style="list-style-type: none"> • Highlight the item in the item list • Click "Delete" • Click "Yes" (assuming you really want to go through with this) • You may be prompted with another box alerting you are deleting the last item on a BID. Select "Yes" here also (it's okay, really) • If a big, red box alerts you there are transaction associated with the item, click "Cancel" until we decide what to do about these 	More soon.
Print Spine Labels	Click "Spine" on the bottom or the side during item creation. Better directions coming soon.	Must be done in CARLX
Search for Bibs	<ul style="list-style-type: none"> • Start in Item Maintenance > Item Information (F6) • Click the "Searcher" button • Select preferred Search Type from the drop-down menu <ul style="list-style-type: none"> ○ Select "Matcher" for UPC searches • Enter Search Terms • Click "Search!" or press Enter • Highlight the record and click "Select Back" 	<p>Search by CARL BID</p> <ul style="list-style-type: none"> • Start in Items • Enter the BID, or bib number, in the CARL in the "Enter Unique Bibliographic Identifier" box a • Click "Search" • All items appear below bib information <p>Search by Bib</p> <ul style="list-style-type: none"> • Start in Items • Select the "Bib Search" option next to "Item Lookup:

		<ul style="list-style-type: none"> • Enter search parameters in the search box (similar to searching the online catalog) • Click the “Select Back” button to take the record back to CARL•Connect Staff
Search for Items	<ul style="list-style-type: none"> • In the CARL•X Staff client, navigate to Item Maintenance > Item Information (F6) • To search by the item’s barcode, select “Item Number” from the Key dropdown menu • Scan or enter the barcode number into the “Terms” box • Click the binoculars or press Enter • Highlight the title in the results grid and click “Select Back” to being working on it <p>To search by another index, select the appropriate means in the Key drop-down and repeat steps above</p>	<p>Login and click “Items.” If you are already logged in to Circulation, you can select the Three Dots and select “Items” from there.</p> <p>Search by Barcode</p> <ul style="list-style-type: none"> • Scan the barcode in the box labeled “Scan or Enter an Item ID” • Click “Search” • The item you searched for will float to the top while other items attached to the bib will display below • Click the orange “Expand” options <p>Search by CARL BID</p> <ul style="list-style-type: none"> • Enter the BID, or bib number, in the CARL in the “Enter Unique Bibliographic Identifier” box a • Click “Search” • All items appear below bib information <p>Search by Bib</p> <ul style="list-style-type: none"> • Select the “Bib Search” option next to “Item Lookup: • Enter search parameters in the search box (similar to searching the online catalog)

		<ul style="list-style-type: none"> Click the "Select Back" button to take the record back to CARL•Connect Staff
Suppress Bibs (from InfoSoup)	<p>Bibs will be suppressed if no available items are attached. Exceptions include on order items and electronic resources.</p> <p>Contact Cat Help if a bib should be suppressed but is not.</p>	<p>Bibs will be suppressed if no available items are attached. Exceptions include on order items and electronic resources.</p> <p>Contact Cat Help if a bib should be suppressed but is not.</p>
Suppress items (from InfoSoup)	<ul style="list-style-type: none"> In Item Editor, check "Suppress in OPAC" <p>The following statuses will automatically suppress: Missing, Damaged, Lost, Not on Shelf</p>	<ul style="list-style-type: none"> In Item Editor, click the orange down arrow next to "Item Information" Check the "Manual" box under Suppression in the Description section Click "Save Item"