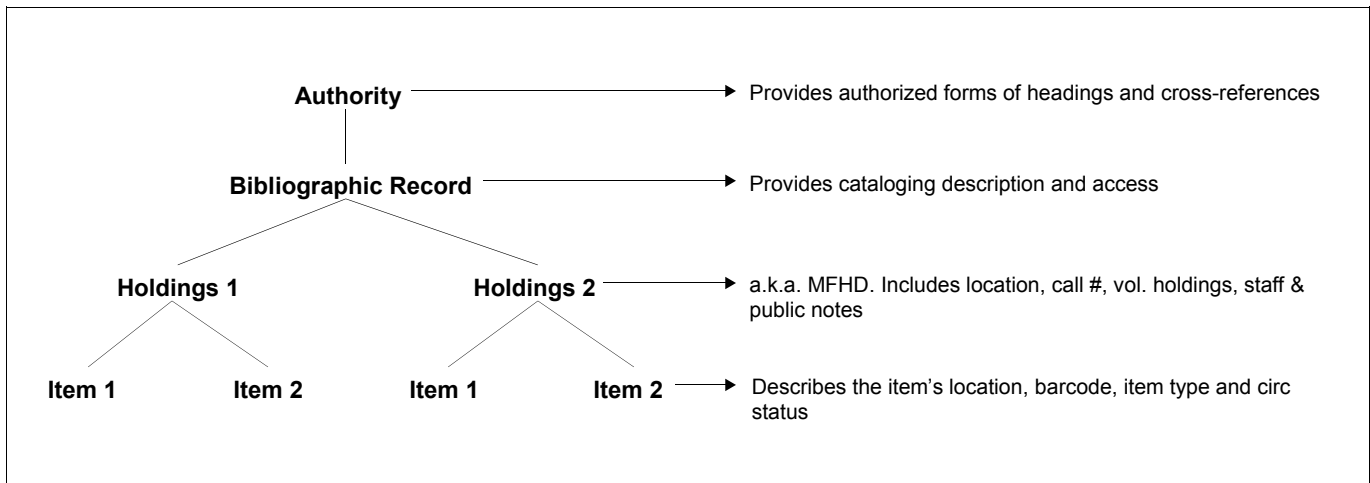


Orbis Record Structure



Windows Tips and Tricks

Using the Mouse

Right-Click = right mouse button

Left-Click = left mouse button (default 'Click')

Double-Click = click the left mouse button twice in rapid succession

To Highlight Text = Position your cursor next to the text you want to highlight and **Click once**. When you see the cursor blinking on the screen, **Click and Hold** the mouse button down and **Drag** the cursor across the text you want to highlight. Let go of the mouse button. The text will remain highlighted unless you click the mouse button again

Keyboard Shortcuts in Orbis

i) Copy = CTRL-C

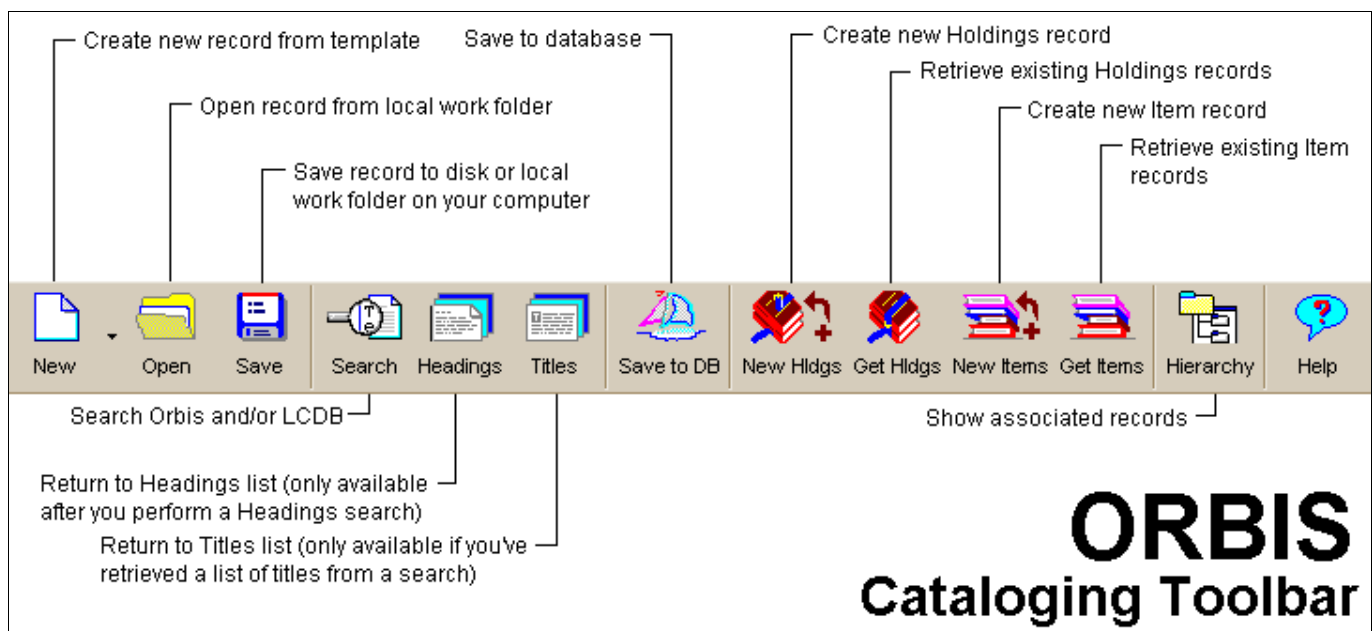
ii) Paste = CTRL-V

iii) Close Window = CTRL-F4

iv) Print = CTRL-P

Multiple Windows = If multiple windows are open, Go to the Window menu to select different windows (You can differentiate between windows by their Titles. The window that is currently open/active is the one with the check ✓ next to it.)

Tiling the windows = Click on Window > Tile. Not advisable if you have more than two windows open at the same time



WHAT YOU NEED TO KNOW ABOUT...

Editing

- **Leader.** Check the Encoding level to make sure the value is not 5 or 8 after cataloging has been completed
- **Navigating Fixed fields:** For long menus, remember you can press first letter of the code & use the mouse wheel
- **Voyager is always in insert.** Pressing the insert key does not turn off insert; it will instead insert a NEW FIELD
- **Right-clicking** in different columns will give you different selection menus. Example: The selection menu to copy, paste, or move a field can only be evoked from the Selection Column
- **Selecting multiple fields:** You can select more than one field for cutting or copying, but you can only execute cut/copy from the edit menu. You cannot cut/copy multiple selected fields when right clicking at the Selection Column. **CAUTION:** If more than one field is selected, and the delete key is pressed, all selected fields will be deleted, not just the field with the arrow in the Selection Column
- **Delimiters:** Use F9 not Shift | to enter the delimiter symbol
- **Field Sequencing:** you have to use the selection menu to cut and paste or move this field up/down by one to re-sequence the fields
- **Clear Screen:** To restore a record prior to editing, close the window (CTRL-F4) and then click Yes. (Equivalent of NOTIS "Clear Screen")
- **Do not** use 927, 928 fields

Item Records

- **Location:** If location is changed in MFHD, you must change the location on the item record
- **Item Type:** Remember to check the item type. SML procedures: For Catalogers, consult the Orbis 2 Training Documents website (*see back page for details*). If none, accept default circ **UNLESS:**
 - a) reference collection
 - b) audiovisual
 - c) serial
 - d) microformFor any of these, check the Item Type table on the Orbis 2 Training Documents website (*see back page for details*)
- **Status tracking** must be done in the Circulation module. (Click on Charge > Wand in Patron barcode > Wand in Item barcode > Click Override if the Item Blocks window opens.)

MFHDs or Holdings

Indicators:

- **First Indicator**
 - a) 0 (LC)
 - b) 7 (nonLC except SuDoc), or
 - c) 3 (SuDoc)
 - d) If first indicator 7 is used, enter \$2 localyale at the end of the call number
- **Second indicator**
 - a) 0 for single part
 - b) 1 for multipart
- **Location Codes:**
 - a) Use subfield b not subfield a for location code
 - b) Commas are no longer used for sublocations
 - c) CTRL-L retrieves a list of valid locations
 - d) Don't use any locations that are in caps
 - e) Use CTRL-N to copy the 050 number into 852
- **LC call numbers:**
 - a) Use subfield h for class number and i for last cutter
 - b) Retain the period before the first cutter when the number is copied from 050 or 090
- **Non-LC call numbers:** Use subfield h for the first line of the call number and subfield i at the first line break
- Use spaces instead of semicolons for line breaks
- **Oversize** is + at the end of the call number AND \$m Oversize for LC call numbers only
- **Staff notes:** Use subfield x
- **Public notes:** Use subfield z
- **Don't use exploding notes;** copy the standard note text from the list on the web
- **Don't edit the 866 __ (no indicators).** It's a receipt line
- If new 866s are added, include the correct indicators 4 1 and linkage codes \$8 0 \$a

ORBIS CALENDAR

Stop Cataloging in NOTIS	Friday May 10th, 2002
Cataloging Go Live	Wednesday June 5th, 2002
All Modules Live	Tuesday July 16th, 2002

Searching

- **Navigating the Search Box in Voyager**
 - a) **Search By:** Jump straight to the index you want by typing the first letter of the index
 - b) **Search For:** Click once inside the Search For box and type in your search string > Click Do Search
- **Staff Searches vs. Other Searches**
 - a) Staff searches retrieve authority AND bibliographic records
 - b) References are only displayed for Staff searches
 - c) There is NO equivalent of the NOTIS FX search to retrieve only authority records
 - d) Staff searches are disabled when you search using Simultaneous Searching
- **Searching by Barcodes or by Voyager Record numbers**

Search barcodes and Voyager record numbers by going to the **Record** menu NOT through the Voyager search screen
- **Recovering a Search**
 - a) Via Toolbar: click on Headings or Titles
 - b) Via Search menu: click on the History tab > Select the search you want > Click on either Edit (to edit the search string) or Do Search (to re-execute the search string)
- **Symbols included in Orbis Searches**
 - a) Apostrophes (e.g. [Title search] Beowulf's children—Voyager will also search without the apostrophe)
 - b) +, /, &

Importing and Overlaying

- **Set Mapping to MARC21** if importing from LCDB or from RLIN (Options > Preferences > Mapping)
- **Set Mapping to OCLC** if importing from OCLC
- **Maximize** your windows
- Use **Simultaneous Searching** (Search > Remote > Add LCDB **and** Local Database > Connect): Staff searches do not work in simultaneous search mode
- **DISCONNECT from LCDB** when you have finished searching
- **Tile your windows** (Window > Tile) so you can see both the imported record and the target record side by side
- **Save your target record first** before saving the imported record to the database
- **If more than one record displays in the DeDupe window, ALWAYS** select the record that matches your target record (refer to the bibliographic number) before clicking on the Replace/merge using Profile button

Saving

- **Use the Sailboat button not the SAVE icon.**
- Response to your current Import/Replace profile message should be NO
- Response to **View the current version before saving** is YES or CANCEL. NEVER USE NO
- **MARC validation:** If a FIELD is invalid, either re-tag or delete it. Correct any invalid subfields or indicators
- **Authority validation.** Click CONTINUE. Note: Some workstations will not have an Authority Validation window open when the Sailboat is clicked
- **NEVER** click Create authority record
- **Make sure the right window is activated** before Saving it to the Database (To activate, click once on the title bar)

QUICK WORKFLOWS

Importing and Overlaying from RLIN/OCLC

1. Search OCLC or RLIN
2. Export or Pass the record you want
3. In Cataloging Module:
4. Adjust import settings to OCLC if importing from OCLC
5. Adjust import settings to MARC21 if importing from RLIN
6. Go to Record > Import > From new file > Select and Open RLINImp or OCLCImp (depending on the utility you are importing from) > Select and Open the file (E.g. pass.sav) > Select and Open the record from the window
7. Open your target record
8. You should now have 2 records open
9. Go to Window > Tile
10. Copy the 035 field from the imported record
11. Activate target record by clicking on its title bar
12. Paste the 035 field into the target record
13. Make sure the target record is ACTIVATED
14. Save the target record to the Database (Sailboat)
15. Save the imported record to the Database
16. Validate your authority heading
17. Click **Continue** to go past the Authority Validation window
18. If more than one record displays in the box, select the record whose ID matches the record you want to overlay (i.e. your target record) and check with your supervisor
19. In the Bibliographic Dedupe Detection dialog box, click on **Replace/Merge using Profile** [YL Merge should be set as the default profile]

Success! You should see a message saying that the record was successfully merged with the overlaid record.

How To:	Bibliographic Records	Holdings (MFHDs)	Item Records
Add a delimiter	F9	F9	
Add a new field	(1) F3 or F4 (to insert a field above or below a selected field) (2) Insert Key	See left	
Closing windows	(1) CTRL-F4 (2) File > Close or File > Close All	See left	See left
Copy a Call Number		Click once anywhere in the 852 field. When you see the blinking cursor, hit CTRL-N to paste in the call number from the Bibliographic record.	
Create New Record	(1) Click on 'New' from the Toolbar (2) Record > New > Bibliographic	(1) Click on New Hldgs button (2) Record > Create Holdings	(1) Click on New Items button (2) Record > Create Items
Delete a field	(1) Highlight a field > Hit the Delete key (2) Highlight a field > Edit > Delete Field (3) Highlight a field > Right-click (make sure your mouse is hovering over the leftmost grey box where the arrow is located) > Delete this Field	See left	
Get a list of valid locations		CTRL-L retrieves a list of valid locations. Don't use any locations that are in caps and make sure your cursor is in the correct subfield	
Re-sequence field order	Right-click when cursor is in the left-most column next to the field you want to re-sequence > Move this field Up or Down	See left	
Retrieve Bib Record		Click on Bib Title(s) tab > Double-click the Title to retrieve it	Hierarchy > Click to select the title > Retrieve
Retrieve Holdings	(1) Click on Get Hldgs button on the Toolbar (2) Click on the Hierarchy button on the Toolbar		(1) Click on Get Hldgs button on the Toolbar (2) Click on the Hierarchy button on the Toolbar
Retrieve Items	(1) Click on Get Items button on the Toolbar (2) Hierarchy button > Expand the MFHD by clicking on the + sign > Click to select the item > Retrieve	See left	
Selecting more than one field to copy/cut	Select the fields you want to copy/cut > Edit > Cut/Copy	See left	

Bookmark these Sites

- **Orbis2 Training Documents** (workflows, item type tables, Diacritics chart)
From Yale Library Home Page > Human Resources > Staff Training & Organizational Development > Course Offerings > Orbis2 Implementation Site > Orbis2 Training Documents
- **Orbis 2 Practice Sessions** (mastery checklists, training manuals and exercises, sign-up for extra coaching)
http://www.library.yale.edu/training/stod/practice_sessions.html
- **Windows 2000 Skills Updater** (course documentation developed by Workstation Support Group on general Windows 2000 skills)
<http://www.library.yale.edu/wsg/docs/updater/index.htm>