




















LS2 Cataloging Quick Reference Guide

<p>Dashboard (aka Home Page)</p>	<p>After logging in, the Dashboard is your starting point and provides access to all LS2 Cataloging functionality. View a quick summary of Recent Activity, or a breakdown by the type of activity:  (added),  (imported),  (edited),  (published),  (deleted).</p> <p>The default period is the Last 24 Hours with options to expand up to the Last 180 Days. Click the LS2 Cataloging logo (top left corner) to refresh and return to the Dashboard from any place in LS2 Cataloging.</p>
<p style="text-align: center;">Spaces</p> <p>Your Title Spaces and/or Item Spaces are a virtual representation of what you are currently working on. From these areas you can search for material (new or already in the system), edit title records, add items, etc.</p>	
<p>Creating/ Modifying Spaces</p>	<p>Click Spaces to view either <i>Title Spaces</i> or <i>Item Spaces</i> currently created in your system. Click the All Spaces drop-down to select <i>My Spaces</i> to view the work associated with the logged in user for either <i>Title Spaces</i> or <i>Item Spaces</i>. Click +Create New Title Space or +Create New Item Space to set up new work. You can have as many work areas as you want.</p>
<p>Adding Title Records or Items</p>	<p>Gather title records for the material you need to work on (whether new or already in the system). From Title Spaces, select +Add to Title Space and scan (or type) the material's standard number. If no exact match is found, expand your search to other databases (if available) by using Search for Records  or edit the overall search using Edit My Search.</p> <p>If you are attempting to add material that does not have a standard number, select +Add to Title Space, then select Advanced to manually input non-standard number data points. Once added to your space, mouse over the Chain icon  to display where the system matched the record. If the link is broken, the system could not find a unique match. Select Edit My Search to expand the search across other Z profiles, or click Create New Record to proceed with original cataloging. Use the Review Record option to match some of the data for the new title record.</p>
<p style="text-align: center;">Record Editor</p> <p>Click the title to access the Record Editor, or select the Edit Record icon  under Actions. Edit bibliographic records (<i>Record</i> tab), items (<i>Items</i> tab), and eResources items and resources (<i>Electronic Resources</i> tab).</p>	
<p>Draft vs. Publish</p>	<p>Is the record complete? Determine whether to make the title record 'live' in the system. 'Draft' saves the incomplete record and retains the record in your space until you complete the record and are ready to publish. If you save the same record to multiple spaces, each time you 'Save as draft' the system updates all of the drafts.</p> <p>'Publish' removes the record from your space and makes the completed record available in your system.</p>
<p>Items</p>	<p>To add items, click the Items tab in the record editor, and then +Add Item. Enter your barcode or select Generate Barcode if configured to generate barcodes. Select the Circulation Status, the Owning Location and Owning Collection along with the Circulating Location and Circulating Collection. The Shelf Location offers suggestions for the call number.</p> <p>To add multiple items to a title, under Save, click the arrow and then Save and Add Another.</p> <p>To create a new item, on the <i>Items</i> tab click +Add Item, or under the More Actions icon  select <i>Duplicate</i> to copy from an existing item.</p>
<p>Item Spaces</p>	<p>Create an <i>Item Space</i> for barcodes you want to bulk print, export, or delete. Item Spaces is the only place you can search for <u>unpublished</u> items.</p>

Deleting Titles or Items	<p>To remove individual titles from a Title Space, click the More Actions icon  and select <i>Remove</i>. If you remove an unpublished record or draft from your Title Space, the information is not recoverable.</p> <p>For published records in your local database, under the Edit Record area, select <i>Delete Record</i> under the More icon . Published title records deleted from the local database are recoverable from the Dashboard. Item records added to the title record before deletion are not recoverable. The status of items associated with the record may prohibit their deletion.</p>
Import	<p>Click Import to begin and select the record files to import. Under <i>Settings</i>, select Published for the Record Status and Available for the Circulation Status to circulate the records immediately, or select Draft for the Record Status to add the records to a Title Space for further editing. If you select Draft, choose which Title Space to send the records. You can send error records to a separate Title Space. Under <i>Unverified authorities</i>, select Keep unverified if you want to review the authorities. From the Import button drop-down list, select <i>Only overwrite bibliographic content</i> or <i>Only insert OCLC control numbers</i>, if desired. The History tab provides the status of completed imports and access to record import error details.</p>
Export	<p>Batch export is available from the Advanced search results or from your <i>Title Spaces</i> or <i>Item Spaces</i>. Location-specific item and title export can only occur from the <i>Items</i> tab in the Advanced search results. Any records that fail to export remain in your Title Space. The bell icon  on the toolbar displays a number representing how many unread notifications you have regarding completed export processes.</p>
Fast Add ILL	<p>To add ILL titles into the system in order to check out a book the library does not own, create a temporary record that will not upgrade overnight, and delete upon check in, click Fast Add ILL. Select the <i>Prompt to Delete Fast Adds on Check In</i> to delete the record when the borrower returns the item.</p>
Labels & Printing	<p>After adding items, click the More Actions icon  to select <i>Print Labels / Print Barcodes</i> OR <i>to print later</i> select <i>Send to Label Print Queue / Send to Barcode Print Queue</i>. Select the individual check box for the item to print a specific label or barcode.</p> <p>Click the Print icon  to access the Print Queue and <i>Archive</i> area for reprinting labels/barcodes. The number next to the icon indicates the combined labels AND barcodes count in the queue.</p>
Search	<p>To perform a global search of your local database, type an item barcode, standard number, or title in the Search box in the menu bar.</p> <p>To perform a search using specific parameters, click Advanced in the menu bar. You can quickly make a change to individual records without adding them to your Title Space. Advanced also offers data points specific to item searching, such as <i>Date – Item Added</i>, <i>Shelf Location</i>, etc.</p> <p>In the result set for either search option, click the title to view the record editor, or click the Edit Record icon . Click the Add to Title Space icon  to save the record to edit later. Select multiple titles using the check box for each title, and then click + Add to Title Space.</p>
Authorities	<p>Titles in your Title Space highlighted in yellow with the icon  designate unverified authorities.</p> <p>Click Authorities or click <i>Unverified Authorities</i> from the Dashboard to see a full list of your unverified authorities. Click the Search icon  to <i>Find a Better Heading</i> or select from the drop-down list and type a search term. The <i>Unverified</i> and <i>Verified</i> tabs display matched terms from your local database, while the ITS•MARC tab retrieves national level results.</p>
Help	<p>Click the Help icon  to open detailed instructions to assist you in your workflows.</p>