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# **MICRODIS**

## **A Microcomputer - Based Development Information System**

**Version 2.2**



# **MANUAL**

**July 1988**

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## PREFACE

MicroDIS is a trilingual, library automation software package developed by the U.S. Agency for International Development (A.I.D.), Bureau for Program and Policy Coordination, Center for Development Information and Evaluation (CDIE).

The initial development of MicroDIS was undertaken by CDIE to assist A.I.D. overseas Missions in organizing and maintaining their local development information resources, and to facilitate the exchange of document-based information among Missions and with A.I.D./Washington. Expanding interest in the software has led CDIE to extend distribution of MicroDIS to A.I.D.-supported projects and other development-related information centers.

MicroDIS can be installed on any IBM PC or compatible, or on a Wang PC with IBM emulation. It provides:

- o an automated library system for creating, maintaining and searching a local catalog; managing acquisitions and circulation; and maintaining A.I.D.-related reference and referral information;
- o a choice of using English, French or Spanish language screens;
- o the potential for exchange of catalog subsets via diskette among MicroDIS users and with A.I.D.'s Washington-based Development Information System;
- o a means of producing and disseminating information about development resources through computer-generated bibliographies and new acquisitions lists.

MicroDIS is designed to be easy to use. It features pre-defined database structures, menu-based selection of options, standardized data entry and retrieval screens, and optional online HELP messages.

It is also designed to be flexible, enabling information centers to use their own standards for local data entry if desired, and to use as many or as few modules and features as are appropriate to their needs.

MicroDIS users are strongly encouraged to communicate with CDIE concerning their experience in using the software and suggestions for future enhancements. CDIE can be contacted at the following address:

U.S. Agency for International Development  
PPC/CDIE/DI  
Room 209, SA-18  
Washington, D.C. 20523 U.S.A.                      ATTN: MicroDIS

Telephone: (703) 875-4970

**MicroDIS developers can be contacted directly concerning any operational questions or problems:**

**Logical Technical Services Corporation  
7222 47th Street  
Chevy Chase, MD 20815 U.S.A.**

**Telephone: (301) 951-7191  
Telex: 3730100 LTSCORP  
Fax: (301) 951-9624**

# SECTION 1: MICRODIS INSTALLATION

## 1.0 OVERVIEW

Installing MicroDIS is very easy. However, it is advisable to first read these instructions in their entirety. The instructions are divided into five broad areas. Each area deals with one aspect of the installation procedure:

- Hardware Requirements
- Loading MicroDIS Software
- Defining the Installation Configuration
- Setting up a MicroDIS Access Command
- Checking Files and Buffers
- Checking Authority Files

## 1.1 HARDWARE REQUIREMENTS

The MicroDIS software will run on IBM or compatible microcomputers (e.g., COMPAQ) running PC-DOS<sup>(1)</sup> or MS-DOS<sup>(2)</sup> versions 2.1 or later. It will operate properly on a WANG PC if it is equipped with an IBM emulation board.

The minimum microcomputer configuration should include 512K of random access memory (640K is recommended) and a hard disk for storage of the data. If installing the Demonstration Diskettes (which contain a small, sample Catalog Database), allow at least 3 Megabytes (MB) of disk storage space. If installing MicroDIS for regular use, allow 1 1/4 MB of disk storage space for the program, plus 2 MB of storage space for every 1,000 catalog records that you plan to maintain. (This provides adequate space for use of all modules.) The microcomputer configuration should also include a sturdy high-speed printer; a tape back-up unit is recommended for installations with over 2,500 records in their MicroDIS Catalog Database).

MicroDIS has been successfully tested on the following PCs:

IBM PC	Leading Edge model M
IBM PC/XT	HP Vectra
IBM PC/AT	PC's Limited Turbo/XT
Compaq Portable Plus	Wang PC w/ IMB emulation

More detailed information on *HARDWARE REQUIREMENTS* is provided in the MicroDIS Demonstration Package. For additional information, contact the MicroDIS Technical Support Staff.

1. PC-DOS is a registered trademark of INTERNATIONAL BUSINESS MACHINES Corporation.
2. MS-DOS is a registered trademark of MICROSOFT, Incorporated.

## 1.2 LOADING MICRODIS SOFTWARE

The first set of steps in installation is associated with loading (copying) the MicroDIS software from the floppy diskettes onto the hard disk of your computer.

These instructions assume that your floppy disk is in drive "A" and your hard disk is in drive "C". If you are using some other configuration, change the disk drive letter designations in these instructions accordingly.

If you are using a Wang PC, remember that you must be in IBM emulation mode.

1. At the prompt C:\> type:

```
MD C:\MICRODIS
```

The prompt C:\> again appears.

This creates a sub-directory on the hard disk, called "microdis". This is the directory into which you will copy the MicroDIS software.

2. At the prompt C:\> type:

```
CD C:\MICRODIS
```

You are now in the "microdis" sub-directory. The prompt again appears, either as C:\MICRODIS> or still as C:\>, depending on whether your computer is set up to show you that you are in a sub- directory.

3. Insert the demonstration diskette marked "MicroDIS #1" into floppy disk drive A.

4. At the prompt C:\MICRODIS> or C:\> type:

```
A:INSTALL
```

A message appears on the screen explaining that you are about to begin installation of the diskettes. Strike any key when ready to continue. The file names on diskettes #1 will appear on the screen as they are copied.

5. Subsequent screen messages will prompt you when to insert the other diskettes. The copying procedure for some of the diskettes may take several minutes. Please be patient.

When copying of the software is completed, remove the last floppy diskette, and follow screen prompts to continue on with configuration.

Technical note: The MicroDIS demonstration package has been delivered in compressed format. In order to properly operate MicroDIS, the files must be decompressed. This is why the PK361.EXE utility is included on the installation diskettes. The PKPAK archive utility and documentation is a very useful package. It is recommended that you retain this PKPAK software, either on floppy disk or in a sub-directory of your fixed disk, so that it will be available for future use. You can also print the documentation file (MANUAL.DOC) for complete instructions in its use.

### 1.3 DEFINING THE INSTALLATION CONFIGURATION

The following set of instructions provide MicroDIS with certain information needed to run the programs and use files.

6. The *MICRODIS CONFIGURATION UTILITY* message now appears on the screen. Press any key to continue.
7. The following question appears on the screen:

*Are data files on a, b, or c drive:*

Normally, you will keep your data on the hard disk, which is usually designated at the "C" drive. Respond to the question by typing the letter <c>.

8. The *INSTALLATION CONFIGURATION PANEL* appears on the screen with the following information:

DISK DRIVE ASSIGNMENTS

FOR PROGRAM: C

FOR TEXT FILES: C

FOR DATA FILES: C

SYSTEM ACCESS WORD:

CALL # SIGNIFICANT DIGITS: 0      Valid range is 0 thru 6

TYPE OF MONITOR: M      <M>monochrome or <C>color

LANGUAGE: EN      Valid languages are:

<EN> for English

<ES> for Spanish

<FR> for French

9. Review the highlighted settings. To make any changes, simply type over the information provided.

Normally, you will leave the first three settings as "C".

You can assign any *SYSTEM ACCESS WORD* (password) that you like, or you can leave the password blank. You can also change the password later using the *SYSTEM UTILITIES* module. If assigned, this password must be used when you log-on to MicroDIS to gain access to all modules; users who do not know the password cannot make any changes to data or run any reports. If you do assign a password, remember the password you assign.

If you have a color *MONITOR*, change the <M> to a <C>.

You may want to leave the *CALL # SIGNIFICANT DIGITS* set at 0 until you have read *Section 8: SYSTEM UTILITIES* for details on how to use this feature.

You can also change any of these settings later using the *SYSTEM UTILITIES* module.

When finished, follow the screen instructions to press the <PgDn> key (#3 on the keypad).

10. Read the final screen messages (this is not a reconfiguration, so you do not need to exit at this time).

#### 1.4 SETTING UP A MICRODIS ACCESS COMMAND

This set of instructions creates a command (a DOS BATCH command) which you will use in future any time you want to access MicroDIS. *Section 2: GETTING STARTED* explains when you will use this command during regular log-on.

11. Leave the "microdis" sub-directory and go back to the "root" (\) directory. To do this type:

```
CD C:\
```

You are now back in the main directory C:\.

12. At the prompt C:\> type the following lines:

```
COPY CON MICRODIS.BAT  
CLS  
CD C:\MICRODIS  
MICRODIS  
CD C\  
CLS
```

Press Function Key 6 <F6> and <Return>.

You have now created the access command, "microdis".

#### 1.5 CHECKING FILES AND BUFFERS

This set of instructions helps you to check, and change if necessary, two internal settings located in a file called the "config.sys" file. If you do need to make a change to this file, and if you are not familiar with the operation of your computer, you may want to call upon computer support personnel to assist you in making the changes (or check the DOS manual on how to use the "edlin" editor).

If you are using a Wang PC in IBM emulation, the "config.sys" file must be on the disk used to boot the IBM software.

13. At the prompt C:\> type:

```
TYPE CONFIG.SYS
```

Several lines should appear on the screen. Two of the lines must appear as follows:

```
FILES=20  
BUFFERS=8
```

If the number is different or one of the lines does not appear, use "edlin" to make changes.

If no changes are needed, continue on with the final step.

## 1.6 CHECKING THE AUTHORITY FILES

MicroDIS is installed with sample entries in several of the authority files. Before beginning use of MicroDIS, it is recommended that you review the content of these files and make changes to reflect local requirements.

14. At the prompt C:\> type:

**MICRODIS**

Check the date and type in the password.

15. On the *MAIN SELECTION MENU*, select *SYSTEM UTILITIES*.

On the *SYSTEM UTILITIES MENU*, select *MAINTAIN AUTHORITY FILES*.

You can now *VIEW* the files to see their contents, and then *ADD* or *DELETE* as necessary. (Demonstration users do not need to make changes unless desired for practice.)

MicroDIS is now ready for your use.

## **SECTION 2: GETTING STARTED**

### **2.0 OVERVIEW**

This section contains a series of graphic illustrations and step-by-step descriptions of common procedures in MicroDIS, intended for the new user and as an easy-to-access reference for infrequent users.

The following topics are covered:

- o Using a Personal Computer
- o Guide to the Keyboard
- o Logging-on
- o MicroDIS Main Selection Menu
- o Getting from Menu to Menu
- o Logging-off
- o Terminology
- o What If ... ? How to Deal with Problems
- o MicroDIS Error Report Form
- o MicroDIS Enhancement Request Form

## **2.1 USING A PERSONAL COMPUTER**

The illustration in Figure 2.1 is provided for any individuals who are not familiar with personal computers (microcomputers). Although computer terms are avoided throughout the Manual, some of these component parts may be referred to by name as follows. Collectively, these components are referred to as hardware, or computer equipment.

### **1 CENTRAL PROCESSING UNIT (cpu)**

The on/off switch for the microcomputer is located on the cpu, usually on the back or side. The cpu controls the operation of the entire system. The unit also may house a hard disk drive and one or more floppy disk drives.

### **2 HARD DISK DRIVE**

The hard disk drive accesses data and programs stored on a hard or fixed disk. Hard disks are capable of holding more data and are more secure than floppy disks. They come in various sizes based on the number of Megabytes (MB) of data they can store (e.g., 5MB, 10MB, 30MB). MicroDIS requires at a minimum a 10MB disk. The hard disk drive is often designated as the " C " drive.

### **3 FLOPPY DISK DRIVE**

The floppy disk drive accesses data and programs stored on floppy or "soft" disks. As these disks are portable, they are vulnerable to damage and wear over time. In MicroDIS, floppy disks are used only during installation, transfer of catalog records from one site to another, and for backup of small databases. When ready to use, floppy disks are inserted into a slot on the front of the cpu. The floppy disk drive is often designated as the " A " drive. If there are two, the second is designated as the " B " drive.

### **4 KEYBOARD**

The keyboard enables users to communicate with the computer by typing in commands or data. The arrangement of keys on keyboards is not always the same (e.g., a Wang PC keyboard may be different than an IBM PC keyboard).

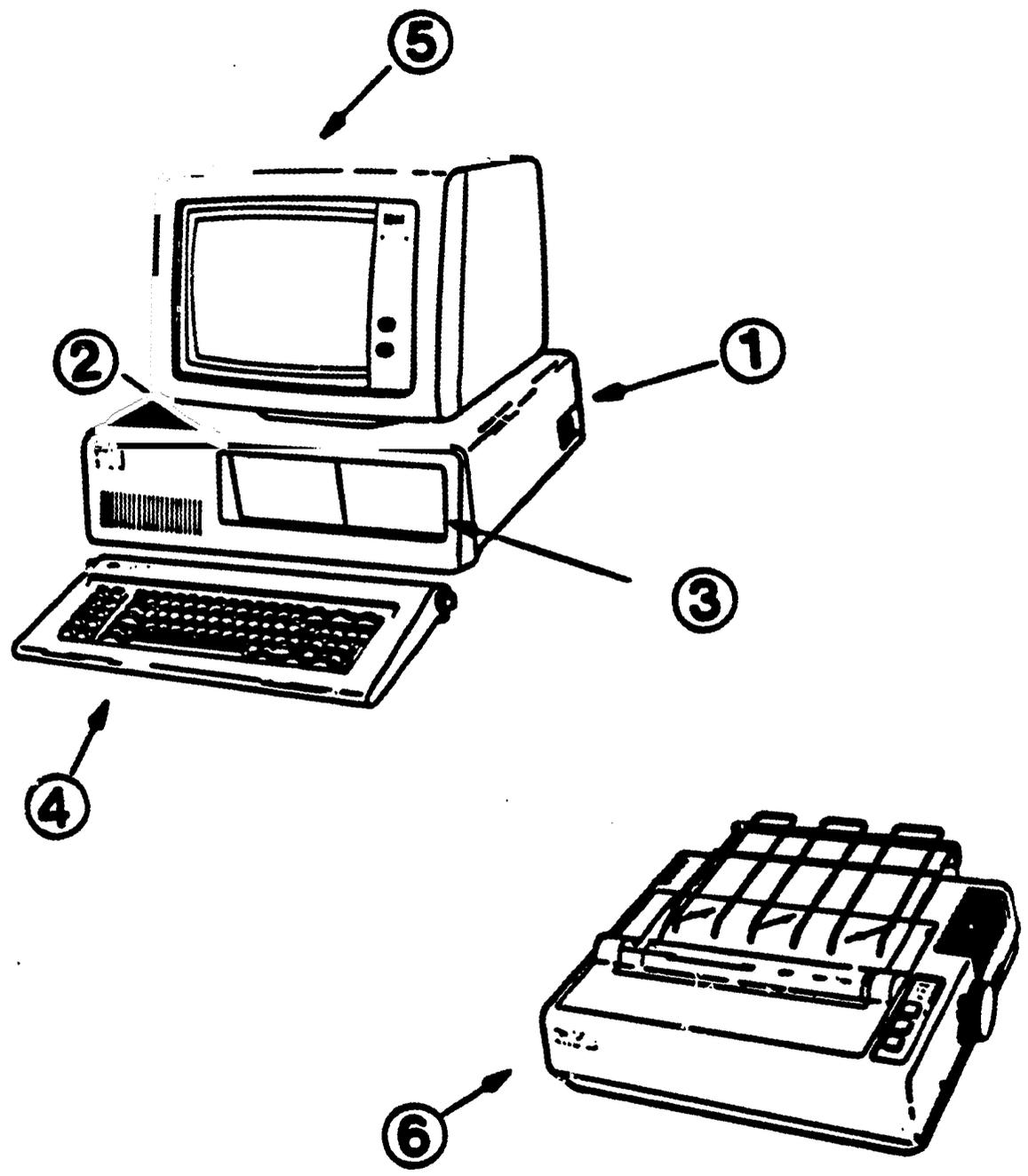
### **5 MONITOR (also referred to as the SCREEN or CRT or DISPLAY UNIT)**

The monitor is a user's window on the computer system, displaying the two-way communication going on between the user (commands, data entry) and the computer (prompts, data output, error messages).

### **6 PRINTER**

Printers are included in most personal computer configurations in order to enable users to record data output and messages on paper when desired. MicroDIS includes options in all modules to produce printed reports.

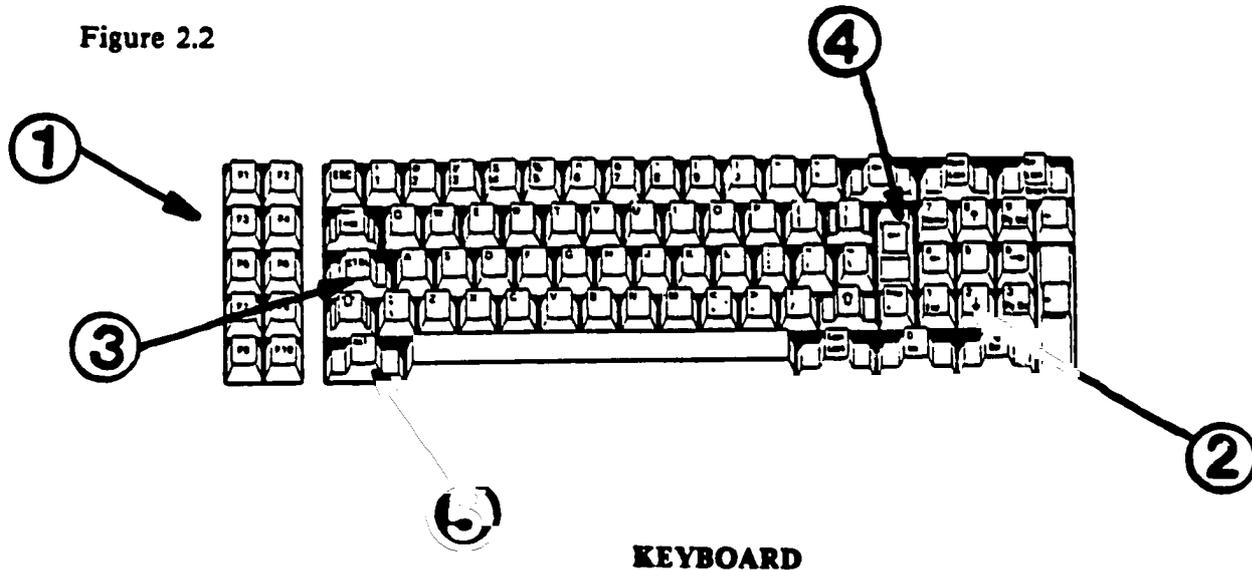
Figure 2.1



## 2.2 GUIDE TO THE KEYBOARD

Throughout this Manual, reference is made to using certain keys on the keyboard. These keys are illustrated in Figure 2.2; general explanations are given underneath.

Figure 2.2



### 1 FUNCTION KEYS

These keys usually appear in two rows along the left-hand side of the keyboard, as in the illustration, or in a single row along the very top of the keyboard. MicroDIS defines certain functions for some of these keys, e.g., Function Key 9 <F9> always enables you to cancel or exit out of an operation. A message across the bottom of the screen indicates when to use these keys.

### 2 CURSOR KEYS or ARROW KEYS

These keys are identified by the arrows which appear on them. They enable you to move the cursor (a blinking line on the screen indicating where you are about to type in data). You can move the cursor vertically by using the <Up Arrow> and <Down Arrow> keys, and horizontally across the screen by using the <Right Arrow> and <Left Arrow> keys.

### 3 CONTROL KEY

This key is marked as an abbreviation of the word Control, e.g., something like <Ctrl> or <Cntl>. It is used in combination with other keys to perform a particular operation.

#### 4 RETURN KEY

This key is usually located just to the right of the second row of letters on the keyboard and shows an arrow pointing to the left. During data entry, it works like the carriage return on a typewriter, moving you to the next data entry area. It is also frequently used to tell the computer that you are finished with your response to a question displayed on the screen.

#### 5 ALT

Like the Control key, <Alt> is used in combination with another key to perform a certain operation.

The use of some of these keys in MicroDIS is as follows:

#### TO MOVE THE CURSOR DURING DATA ENTRY:

FORWARD	TO NEXT CHARACTER TO NEXT WORD TO NEXT FIELD	<Right Arrow> <Control> + <f> <Down Arrow>
BACKWARD	TO PREVIOUS CHARACTER TO PREVIOUS WORD TO PREVIOUS FIELD	<Left Arrow> <Control> + <e> <Up Arrow>

#### TO CORRECT MISTAKES DURING DATA ENTRY OR MODIFICATION:

DELETE ONE CHARACTER	PLACE CURSOR UNDER CHARACTER	<Control> + <g>
DELETE ONE WORD	PLACE CURSOR UNDER FIRST LETTER OF WORD	<Control> + <t>
DELETE TO END OF FIELD	PLACE CURSOR UNDER FIRST LETTER OF WORDS TO BE DELETED	<Control> + <y>
REPLACE	PLACE CURSOR UNDER CHARACTER TO REPLACE	Type over
ADD MISSING CHARACTERS	PLACE CURSOR WHERE ADD BEGINS	Press <Insert> ON then type

#### FUNCTION KEYS:

TO DISPLAY A HELP MESSAGE FOR AN OPTION, FIELD OR PROMPT:	Function Key 1 <F1>
TO PROCESS THE INFORMATION ON A DATA ENTRY SCREEN:	Function Key 5 <F5>
TO CANCEL A DATA ENTRY SCREEN, OR TO EXIT:	Function Key 9 <F9>

## 2.3 LOGGING-ON

1

Turn on the microcomputer using the switch on the cpu. Turn on the monitor and printer separately, if your system is set up this way.

If you are using an IBM PC or compatible, type "date" at the C:\> prompt. You will be asked to enter today's date. (Alternatively, your PC may be set up to enter the date automatically).

2 (Wang only)

From the menu displayed, select IBM EMULATION. When prompted to fill in the date, BE SURE to type in today's date again.

3

At the C:\> prompt, type the word "microdis".

4

The MicroDIS welcome screen is displayed, as in the top of Figure 2.3. Follow the instructions and press any key, e.g., <Return>.

5

The MicroDIS Log-on/Log-off screen is displayed, as in Figure 2.4.

First check the flashing date. Be sure that it is correct. Several MicroDIS reports will only be accurately prepared if the date is entered correctly. If it is incorrect, press <F9> to exit, enter the date correctly (see Steps 1 and 2 above), and then access MicroDIS again as in 3 above.

Next, type in the password assigned by your site. If your password is five characters long, MicroDIS automatically displays the *MAIN SELECTION MENU*. If it is less than five characters, you will have to press <Return> to signal MicroDIS that you are finished typing. If you do not know the password and simply press <Return>, or if you type an incorrect password, you will only be able to *SEARCH* the Document Catalog or use the *REFERENCE DESK*.

6

The MicroDIS *MAIN SELECTION MENU* is displayed (Figure 2.5).

Figure 2.3

```

                                U.S. Agency for International Development
                                Center for Development Information and Evaluation
                                Washington, D.C. 20523

```

```

-----
* * *** ***** ** ** ** **
** ** * * * * * * * * * *
* * * * * * * * * * * *
* * * * * * * * * * * *
* * * * * * * * * * * *
-----
                                version 2.2 ** July 1988
-----

```

Prepared under AID contract number OTR-0000-C-00-4446-00  
by: LTS Corporation  
7222 47th Street  
Chevy Chase, MD 20815 USA  
(301) 951-7191

Press <Spacebar> to continue...

Figure 2.4

```

                                MicroDIS
                                -----
                                WELCOME

                                Today's date is __/__/__ (format is MM/DD/YY)
                                If this is not correct, EXIT now and enter
                                the correct date.

                                Type password to begin MicroDIS:

                                Select desired language or depress RETURN to continue
                                with current language selection:
                                English ... EN )
                                French ... FR )
                                Spanish ... ES )

                                Press Function Key 9 <F9> to EXIT MicroDIS

```

Figure 2.5

```

***** MAIN SELECTION MENU *****
                                Acquisitions
                                Circulation
                                Log
                                Document Catalog
                                Reference Desk
                                System Utilities

                                EXIT
-----
                                Record, track & report on acquisitions
-----
                                Press Function Key 1 (F1) for help at any time.

```

## 2.4 MICRODIS MAIN SELECTION MENU

This menu (Figure 2.5) lists all of the major areas of information center activity that are supported by MicroDIS.

To select one of the options on this (or any) menu, you can either:

- o Type the first character of the option you want (e.g., **A** for Acquisitions), or,
- o Press the **<Down Arrow>** or **<Up Arrow>** key to highlight the option you want, and then press **<Return>**.

If you use the second method, a brief message appears below the menu for each highlighted option explaining what each module enables you to do.

Each option leads you to a second menu of more specific options, or functions, that you can perform within the selected module. In order to see the full set of choices in all MicroDIS modules, and to understand how the different menus relate to one another, see Figure 2.6.

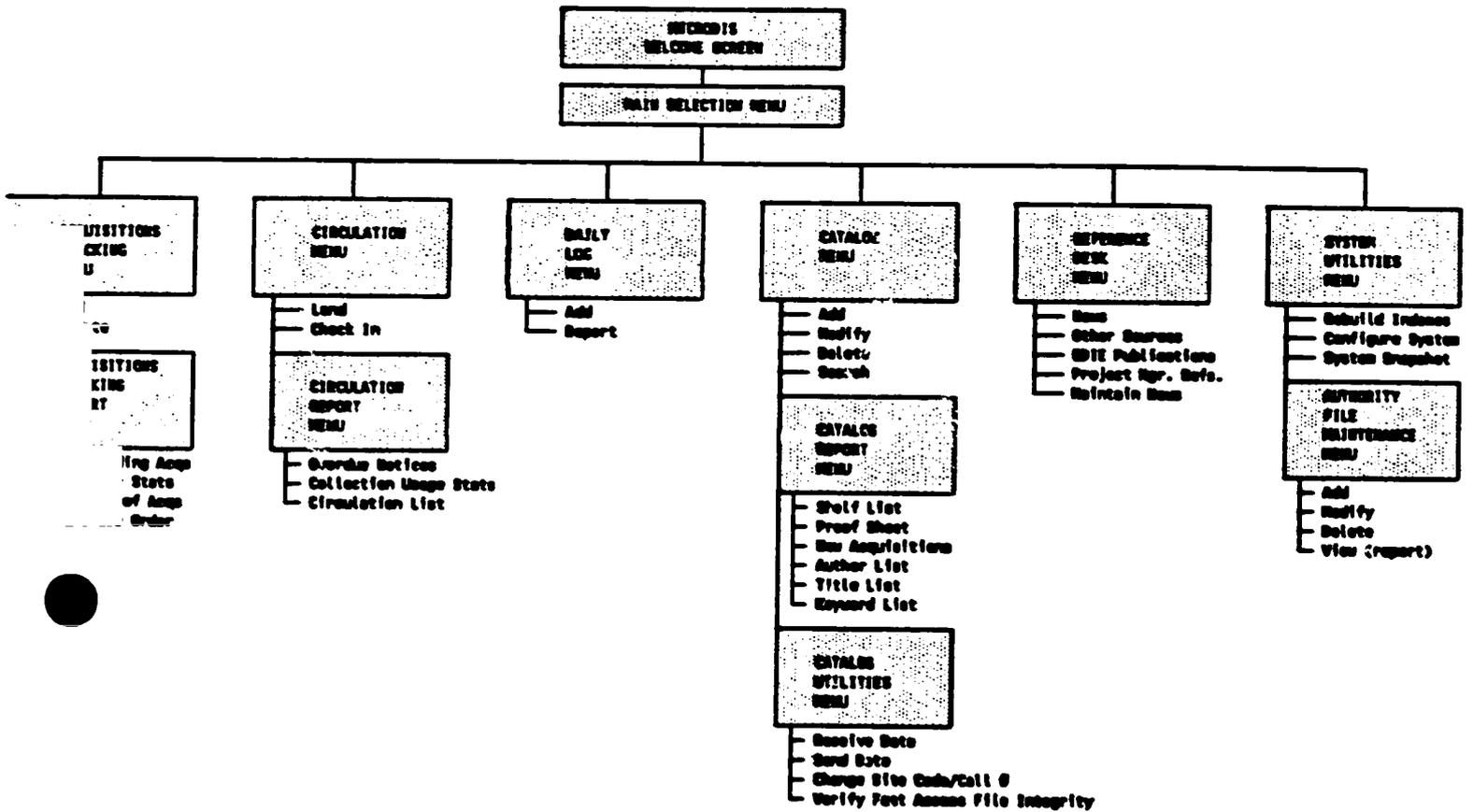
## 2.5 GETTING FROM MENU TO MENU

As you can see from the illustration in Figure 2.6, the path from menu to menu appears somewhat like the roots of a tree.

Some options on the *MAIN SELECTION MENU* only lead to one other menu listing all of the functions that you can perform in that module. See, for example, the *LOG* module. Other options lead to second and third level menus, e.g., *CIRCULATION*, *DOCUMENT CATALOG* and *SYSTEM UTILITIES*.

- o To move forward to another menu or function, select the option desired from among those listed on a menu.
- o To move backward to a previous menu, select **EXIT** from a menu, or press Function Key 9 **<F9>** from any other type of screen.
- o To exit MicroDIS completely, continue to select the option to **EXIT** until you can go no further. You are now back to the MicroDIS Log-on/Log-off Screen. See the instructions below on logging off.

Figure 2.6



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## 2.6 LOGGING-OFF

To exit completely from MicroDIS (in other words to log-off):

- o Once you have exited back to the Log-on/Log-off screen (Figure 2.7), press <F9>.
- o You should see the C:\> prompt on the screen.
- o That's it. You can turn the cpu off using the on/off switch.

Figure 2.7

```
MicroDIS
-----
WELCOME

Today's date is __/__/__ (format is MM/DD/YY)
If this is not correct, EXIT now and enter
the correct date.

Type password to begin MicroDIS:

Select desired language or depress RETURN to continue
with current language selection:
English ... EN )
French ... FR )
Spanish ... ES )

Press Function Key 9 <F9> to EXIT MicroDIS
```

## 2.7 TERMINOLOGY

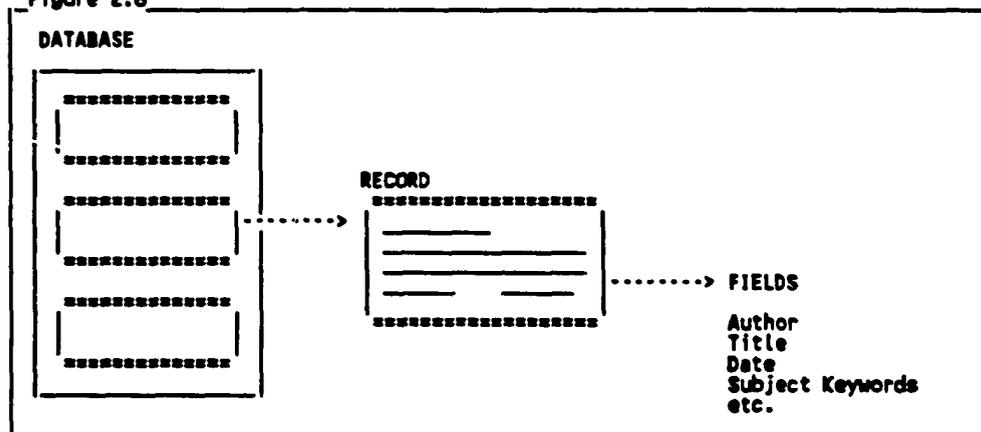
Use of MicroDIS may involve some terminology with which you are not familiar. Several terms are briefly explained below. If you have had any experience with computer-based information systems, you will find that MicroDIS uses terms common to most of these systems (see also Figure 2.8).

**Database** -- A database is a collection of standard units of information. For example, the MicroDIS Catalog Database contains catalog records, each of which follows the same format for describing one item in a document collection. The MicroDIS Acquisition Tracking Database contains information about all items on order, and the Circulation Database identifies all items on loan.

**Records** -- The component units of a database are referred to as records. Catalog records contain the same type of information that is entered on catalog cards. MicroDIS also creates acquisitions tracking records for each item ordered, and circulation records for each item loaned.

**Fields** -- The component parts of a record are referred to as fields, e.g., author field, title field, date of publication field, etc.

Figure 2.8



In addition, there are two kinds of supporting files. They are briefly described below and summarized in Figure 2.9. Details on the use and application of these files are also discussed throughout the manual as appropriate.

**Authority files** -- There are nine authority files. These are used in connection with various MicroDIS modules and contain all of the codes, acronyms, keywords, stopwords or messages used by each installation. MicroDIS uses these files as "master lists" to check the accuracy of data entered in certain fields, and to ensure that certain data is stored and displayed in a consistent format. MicroDIS is installed with data already loaded into some of these files. However, the content of all authority files can be changed and maintained by each installation. All of these files should therefore be reviewed and modified as necessary before beginning use of MicroDIS. The content of the files can also be viewed and modified at any time after installation, following the procedures described in *Section 8: SYSTEM UTILITIES*.

**Fast access files** -- The four fast access files are used in connection with searching the document catalog. The files contain all of the (1) author names, (2) major title words, (3) subject keywords and (4) bibliographic type codes that appear in the catalog database, and indicate how many times each entry appears. MicroDIS automatically creates and updates the entries in these files each time a catalog record is added, modified or deleted. The use of these files during catalog searching is described in *Section 6.4: SEARCH THE CATALOG*.

Figure 2.9

	AUTHORITY FILES	FAST ACCESS FILES
PURPOSE	Help to maintain consistency in way data is entered and printed	Help to speed search and retrieval in the Document Catalog
CONTENT	Locally approved codes, subject keywords, stopwords, acronyms for potential use	All author names, title words, subject keywords, bibtype codes actually appearing in Catalog
MODULES USED WITH	Acquisitions Circulation Daily Log Document Catalog	Document Catalog
HOW CREATED	By user	By system (automatically)
HOW ACCESSED	In System Utilities module, Maintain Authority Files option	In Document Catalog module, Search option

## 2.8 WHAT IF ... ? HOW TO DEAL WITH PROBLEMS

The first thing to do if a problem occurs is: don't panic. Something can be done to resolve the problem. If you don't know what to do, try to find someone who can help. *Section 9: TECHNICAL REFERENCE* includes a list of possible causes of problems and how to resolve them.

Below are two situations in which you might need to take some action even if there is no one around to assist.

### EMERGENCY BREAK ... to stop MicroDIS without exiting

The preferred way to leave MicroDIS is to log-off using the features programmed into MicroDIS (see sections above). If you leave MicroDIS in this way, all database files and indexes will be properly closed.

If you find that you cannot log-off (e.g., if for some reason the system locks up), there is still a way to try to leave MicroDIS using a "break" procedure. Note, however, that there is no guarantee that any files open at the time will not be damaged. To initiate an emergency break:

1. Simultaneously depress the <Alt> and <c> keys.

The operating system will display in the upper right hand corner of the screen the message:

2. *QUIT? (Q/A/I)*

You have three options:

3. Quit ... this is the option you should select.

Abort ... do not select this option.

Ignore ... this returns you to MicroDIS but does not unlock the system.

Following completion of this procedure, try to get assistance from computer support personnel to check if any files were affected, and if necessary to restore the data from your last backup (see *Section 9: TECHNICAL REFERENCE*).

### POWER FAILURE

If the power does go off, even temporarily, try to switch off the cpu before the power comes back on. You may want to ask computer support personnel to turn it back on and check the data before resuming use. Data may have to be restored from the last backup. (If the PC is linked to an Uninterruptible Power Supply system, exit normally as soon as possible.)

# MICRODIS ERROR REPORT FORM

Site Name

Date

Time

Contact (Name, Address, Telephone number)

System error message - If any (word for word)

Module/Function where error occurred

Description of error (what were you doing?)

Did anything unusual (e.g.: power outage) occur before error? (Explain what happened.)

Did you REBUILD your indexes? (If so, explain what happened afterward.)

Did you RESTORE the database? (If so, explain what happened afterward.)

# MICRODIS ENHANCEMENT REQUEST FORM

Site Name

Date

Contact (Name, Address, Telephone number)

Module/Function to be enhanced

Nature of enhancement, be specific.

Explain how this enhancement will benefit users of MicroDIS.

## SECTION 3: ACQUISITIONS

### 3.0 INTRODUCTION

The MicroDIS *ACQUISITIONS* module is designed to assist information centers in centralizing, automating and managing information about the acquisitions process.

The core of this module is the Acquisitions Tracking Database containing records for each item on order. Records are added to this database by filling in a formatted data entry screen. Each record is then modified as orders are received. The data contained within all records is used by MicroDIS to create lists of items on order, and to compute and produce several statistical reports.

The three functions used to perform these activities are listed on the *ACQUISITIONS TRACKING MENU* (Figure 3.1).

Figure 3.1

```

***** ACQUISITION TRACKING MENU *****
      Add
      Update
      Report
      EXIT
-----
Add an order
*****

```

Select *ADD* to create an acquisitions record.

Select *UPDATE* to modify an acquisitions record.

Select *REPORT* to print or display on the screen any of the following acquisitions reports:

- o *Outstanding Acquisitions* (list of items not yet received)
- o *Acquisitions User Statistics* (numbers, percentages, cost)
- o *Summary of Acquisitions* (number of items/cost by requesting office)
- o *Purchase Order* (printout purchase order information)

### 3.1 ADD AN ACQUISITIONS RECORD

ADD provides a formatted data entry screen on which to record information about each item on order and about the individual or office requesting the order. The information supplied on each data entry screen is stored by MicroDIS as one acquisitions record in the Acquisitions Tracking Database.

The data entry screen for each item on order appears as follows:

Figure 3.2

```
ACQUISITION TRACKING - ADD
=====
ACQUISITION ID ... following three fields
ORDER DATE: __/__/__ (mm/dd/yy) PO #: _____ ITEM #: __
TITLE
_____  
_____  
_____  
_____  
PUBLISHER: _____ FUNDING SOURCE  
VENDOR: _____  
QUANTITY: __ UNITY COST: ____ 0.00 DUE DATE: __/__/__ (mm/dd/yy)  
PATRON NAME: _____ (enter last name first)  
AFFILIATION: -  
OFFICE: _____  
PHONE NUMBER: _____  
  
Hit <F1> for help, <F5> when done, <F9> to cancel
```

To create an acquisition tracking record, fill in the data entry screen. The only requirements for the content of each field are as follows:

1. All data fields must be completed with the exception of office and phone number. If any of the other required fields are not relevant, you must at least enter any of the following: "none", "not applicable", "n/a", 0. For example, if funding source does not apply to your installation, you could enter: "none".
2. Each record in this database is identified by the combined information entered on the first line of the screen: (1) order date, (2) purchase order number (PO#), and (3) item number (on the purchase order) (see Figure 3.2). Adapt these fields as necessary for your own site, remembering that the resulting combined number must be unique.  
  
For example, for the purchase order number, you may want to include the acronym of the organization, followed by the year, followed by a sequential number (e.g., LTS-88-01, LTS-88-02, etc.). If you do not request more than one item per order, the item # would be 0.
3. Follow any format designated on the screen (e.g., mm/dd/yy or last name, first name/initial).

4. For affiliation, enter one of the user affiliation codes created by your site. The complete list of codes is maintained in the *User Affiliation Codes Authority File* found in the *SYSTEM UTILITIES* module. These codes are used by MicroDIS to aggregate statistics by the various categories of users identified by each site.

When data entry is complete, hit Function Key 5 <F5> to add the record to the Acquisitions Tracking Database. Before adding the record, MicroDIS checks:

1. to make sure each data field has been filled in
2. to make sure the affiliation code appears in the *User Affiliation Codes Authority File*

If any errors have been made, MicroDIS displays an error message and waits for you to enter the correct information. After making any corrections, press <F5> again to recheck the record and finally add it to the database.

The system then returns to the acquisitions data entry screen (Figure 3.2) to allow you to add additional items on order, or to exit the *ACQUISITIONS* module.

### 3.2 UPDATE AN ACQUISITIONS RECORD

Update is used (1) to modify any data in an acquisitions record, (e.g., vendor, patron telephone number), or (2) to add the date that the item was acquired (received).

To access an acquisition record, you must know the date ordered, purchase order number (PO#), and the item number. If you do not have this information at hand, you can find it by selecting the Acquisition *REPORT* function and either displaying on the screen or printing the current *Outstanding Acquisitions Report*.

When you have this information ready, select *UPDATE*. The next screen asks for this information (Figure 3.3).

Figure 3.3

```
ACQUISITION TRACKING - UPDATE
.....
Enter the ACQUISITION ID of the item to be updated.

ORDER DATE:  __/__/__ (mm/dd/yy)
PO NUMBER:  _____
ITEM NUMBER:  _____

Hit <F1> for help, <F5> to update, <F9> to cancel or EXIT
```

MicroDIS searches for the acquisitions record. If it is not found, the message *acquisition unknown* flashes on the screen.

If the corresponding acquisition record is found, the record is displayed (Figure 3.4). This helps you to verify that the item identified is the item you want to update.

Figure 3.4

```
ACQUISITION TRACKING - UPDATE
=====
ACQUISITION ID ... following fields
ORDER DATE: _/_/_   PO NUMBER: _____   ITEM NUMBER: _
TITLE
-----
PUBLISHER: _____
VENDOR: _____
QUANTITY: _   UNIT COST: _____   DUE DATE: _/_/_ (mm/dd/yy)
DATE ACQUIRED: _/_/_ (mm/dd/yy)
DATE CLOSED: _/_/_ (mm/dd/yy)
PATRON NAME: _____ (enter last name first)
AFFILIATION: _____
OFFICE: _____
PHONE NUMBER: _____
Hit <F1> for help, <F5> to do update, <F9> to cancel or EXIT
```

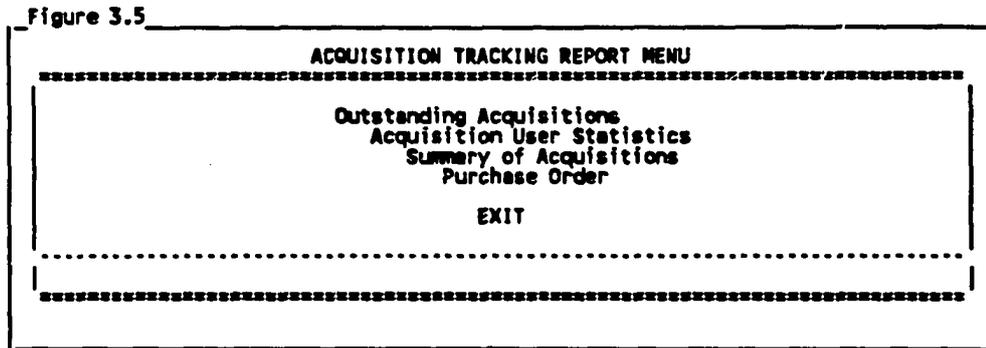
If it is the correct item, you can now modify or update any of the information displayed on the screen except for that included in the "acquisition id."

The data which you are most likely to update is the "date acquired" and/or "date closed." The first is the date that the item is received at your installation. The second is the date after which the item no longer needs to be tracked in this module and can be removed from the Acquisitions Database (e.g., payment for the item is complete -- see *Section 3.3.3: Summary of Acquisitions Report* for instructions on how to remove these items).

When finished, press <F5>. MicroDIS checks the acquisition record again. If any errors are found, messages are displayed on the screen and MicroDIS awaits your corrections. If no errors are found, the acquisitions record is updated and MicroDIS returns to the *UPDATE* identification screen (Figure 3.3).

### 3.3 REPORT ON ACQUISITIONS

To display or print acquisitions data in one of several formats, select the *REPORT* function. The following menu provides a list of the available formats (Figure 3.5):



#### 3.3.1 Outstanding Acquisitions Report

This report provides you with a listing of all items ordered but not yet acquired (received).

The entries in the report are sorted by purchase order number (PO#) and appear in the following format (Figure 3.6):

Figure 3.6

Date	PO Number	It	Title	Vendor
04/30/88	LTS-88-01	01	Agricultural development in Malawi	USDA
06/15/88	LTS-88-02	01	Trends in Third World privatization	Holmes
06/15/88	LTS-88-02	02	Trade deficits	Holmes

Press <F9> to EXIT ...

When you request this report, the following question appears on the screen:

*Report to <S>creen or <P>rinter?*

Respond <s>creen to display the report on the computer screen, or <p>rint to direct it to the attached printer.

When the report is completed, MicroDIS displays the message:

*Press <F9> to EXIT.*

MicroDIS returns to the *ACQUISITION TRACKING REPORT MENU* (Figure 3.5).

### 3.3.2 Acquisition User Statistics Report

This report provides summary information in the following format on the distribution of orders and acquisitions funds among various affiliation categories of requestors (see Figure 3.7).

For each affiliation category, the report displays the number of orders placed (expressed as both a number and as a percentage of the total), and the total amount of money spent or committed (expressed in units of currency and as a percentage of the total). In addition, the report shows the total number of orders outstanding, and the number of items acquired.

Figure 3.7

User Statistics from Acquisitions Tracking Module				
Source	# of Items Ordered	Percent of Total	Value of Orders	Percent of Total
AID EMPLOYEE	1	7.14	1250.00	85.92
AID CONTRACTOR	13	92.86	204.85	14.08
*****	*****	*****	*****	*****
TOTAL ORDERED	14		1454.85	
TOTAL ACQUIRED	0			
TOTAL CLOSED	0			

Press <F9> to EXIT

When this report is selected, the following question appears on the screen:

*Report to <S>creen: or <P>rinter?*

After you respond to this question, MicroDIS displays the following message while the process of computing the statistics is going on:

*CREATING NEW INDEX*

*TOTALS BEING CALCULATED*

When the report is completed, MicroDIS displays the message:

*Press <F9> to EXIT ...*

MicroDIS then returns to the *ACQUISITION TRACKING REPORT MENU* (Figure 3.5).

### 3.3.3 Summary of Acquisitions Report

This report summarizes all orders in the Acquisitions Tracking Database. The report shows, for each individual requesting an order, the number of items ordered and the associated monetary value (see Figure 3.8). Individual totals are summarized by office level, and office subtotals are totaled for all affiliation categories. Grand totals are also calculated.

Figure 3.8

<u>AFFIL</u>	<u>OFFICE</u>	<u>NAME</u>	<u>#ITEMS</u>	<u>COST</u>
A	USAID/POPULATION	JAMOKSY, S.	5	250.00
		*** OFFICE TOTAL ***	5	250.00
		*** AFFILIATION TOTAL ***		
C	COMPUTER CENTER	MAGRO, JORGE	1	1250.00
		*** OFFICE TOTAL ***	1	1250.00
		*** AFFILIATION TOTAL ***	1	1250.00
Press <F9> to EXIT ...				

When this report is requested, the following message and question are displayed:

*CREATING NEW INDEX  
Report to <S>creen or <P>rinter?*

Following your response, MicroDIS asks:

*Do you want acquired items removed from the database? <Y>es/<N>o*

If you respond <n>o, MicroDIS immediately produces the report. If you respond <y>es, MicroDIS displays the following verification message:

*You have indicated that closed items are to be removed.  
Are you certain? <Y>es/<N>o*

After you respond to this question, MicroDIS produces the report. If acquired items are removed, MicroDIS deletes these records from the database after the report has been produced.

When the report (and record deletion) is completed, MicroDIS displays the message:

*Press <F9> to EXIT ...*

MicroDIS returns to the *ACQUISITION TRACKING REPORT MENU* (Figure 3.5).

### 3.3.4 Purchase Order Report

This report displays acquisitions currently in the Acquisitions Tracking Database in purchase order format (see Figure 3.9). For each purchase order number (PO#), MicroDIS lists all items ordered on that PO, the quantity of each item ordered, and the unit and total cost for each item. Also, for each item, the report shows the date acquired. In addition, the total value of all items on the purchase order is calculated.

Figure 3.9

(PO #)	04/30/88	LTS-88-01		(Vendor) IBM CORP.	
(Requestor)	HOWARD, PAUL G.			LTS CORP.	951-7191
Item	Quan	UnitCost	ExtdCost	Funding Source	Acq Date
	Title				
01	2	50.00	100.00	5187602	/ /
	P DOS Manual				
Press <SPACEBAR> to continue ...					

When you select this report, the following question is displayed:

*Report to <S>creen or <P>rinter ?*

MicroDIS then asks:

*Do you want a <S>pecific PO or <A>ll POs?*

If you want to produce a <s>pecific purchase order, MicroDIS asks you to provide the following information:

*ORDER DATE: \_\_/\_\_/\_\_*  
*PO NUMBER: \_\_\_\_\_*

If you want to produce <a>ll purchase orders, MicroDIS creates a separate purchase order for each PO# in the Acquisition Tracking Database.

Finally, if you elected to print the purchase order(s), MicroDIS asks:

*Does printer have <N>arrow or <W>ide carriage?*

When the report is completed, MicroDIS displays the message:

*Press <F9> to EXIT ...*

MicroDIS returns to the *ACQUISITION TRACKING REPORT MENU* (Figure 3.5).

## SECTION 4: CIRCULATION

### 4.0 INTRODUCTION

In order to keep track of materials borrowed from their collections, libraries and information centers record the loan and return of each item. The MicroDIS *CIRCULATION* module makes it possible to perform these activities in less time and more efficiently than is possible with manual procedures. The module is also linked to the *DOCUMENT CATALOG* module. As a result of this link, *CATALOG* search results automatically indicate whether any of the items retrieved are currently on loan, and the *CIRCULATION* check-out process automatically retrieves a verification copy of the catalog record of the item to be loaned.

There are three functions within this module which correspond to each of the major circulation activities: *LEND*, *CHECK IN* and *REPORTS*.

To use any of these functions, first select *CIRCULATION* from the *MAIN MENU*. The following *CIRCULATION MENU* is displayed on the screen (Figure 4.1).

Figure 4.1

```
----- CIRCULATION MENU -----
Lend
Check in
Report
EXIT
-----
Record document check out
-----
```

Select *LEND* to record the site code, call number and copy number of an item to be checked out of the information center, as well as information about the borrower and due date. Circulation records for uncataloged materials (i.e., those without a call number, such as periodicals) can also be created.

Select *CHECK IN* to record the return or renewal of an item. Only the call number (or its replacement for uncataloged materials) is needed to find the check out record created during the above process.

Select *REPORT* whenever needed to print out (1) Overdue Notices, (2) Circulation Usage Statistics (showing how often each item is borrowed) and (3) a Circulation List of all items currently on loan.

## 4.1 LEND A DOCUMENT

When you select *LEND* from the *CIRCULATION MENU*, the following entry screen is displayed (Figure 4.2).

Figure 4.2

```
CIRCULATION - CHECK OUT
=====
SITE CODE: _____
CALL NUMBER: _____ (use UNCAT if document uncataloged)
COPY CODE: 1
BORROWER NAME: _____ (last name, first name)
AFFILIATION: _____
OFFICE: _____
ADDRESS: _____
PHONE: _____ LOAN TERM (days): __ (use 99 for indefinite term)

Hit <F1> for help, <F5> to record loan, <F9> to cancel or EXIT
```

### 4.1.1 Creating a Circulation Record

To create a circulation record, type in the information requested for the item and the patron. The blank spaces in the above illustration (Figure 4.2) correspond to the highlighted areas on the screen.

You must enter data into all of the highlighted areas, with the exception of the address and phone number.

Remember to use the <Down Arrow> key to move forward through the screen, the <Up Arrow> key to move backward, and the <Right Arrow>/<Left Arrow> keys to move forward and backward within one line.

#### SITE CODE:

The code for your site automatically appears on the screen. If for any reason it does not appear or you need to change it, type in the correct site code.

#### CALL NUMBER:

Type in the call number as it appears on the document. If the item being borrowed has not been cataloged, enter UNCAT. You may check out several uncataloged items by entering UNCAT each time.

#### COPY CODE:

As it is assumed that there is only one copy of most materials, the number 1 is automatically entered. If you are circulating some other copy (e.g., copy number 2), type over the 1 with the correct copy number.

#### BORROWER NAME:

Type in the name of the person borrowing the material, using the format: last name, first name.

**AFFILIATION:**

Use one of the affiliation codes established by your site. To check the codes you can use, exit to the *MAIN MENU* and select *SYSTEM UTILITIES* to view the *User Affiliation Code Authority File*.

**OFFICE:**

Enter the name of the office that the borrower is associated with, or "none".

**ADDRESS:**

Enter a brief address for the borrower, or "none", or leave blank.

**PHONE:**

Enter a telephone number for the borrower, or "none", or leave blank.

**LOAN TERM:**

Type in the number of days that the item is on loan (e.g., 7 or 14), or type in 99 if the loan is for an indefinite period of time.

When finished entering data on the screen, press <F5> to record the loan. Note that MicroDIS also automatically records the date that the item is checked out (and then uses this date as a basis for determining which items are overdue when you run the *Overdue Notices Report*).

**4.1.2 Checking for Errors**

MicroDIS now checks the data to verify that:

- o all required information is included
- o the site code/call number match one of the site code/call numbers in the catalog database (or that UNCAT is entered)
- o the copy number entered is not associated with a copy already circulating, and
- o the user affiliation code is accepted by that site.

If any of these conditions is not met, one or more error messages flash on the screen to explain which data is missing or incorrect.

To correct the errors found, type in missing data or type over incorrect data and press <F5> again. To cancel the record, press <F9>.

### 4.1.3 Verifying a Cataloged Item

When the above four conditions are met, the check out information is redisplayed at the top of the screen.

If it includes a specific call number, part of the corresponding record in the Catalog Database appears at the bottom of the screen for verification, as displayed in Figure 4.3.

Figure 4.3

```
CIRCULATION - CHECK OUT
=====
SITE CODE: _____
CALL NUMBER: _____ (use UNCAT if document uncataloged)
COPY CODE: T _____ (use only to show multiple copies)
BORROWER NAME: _____ (last name, first name)
AFFILIATION: _____
OFFICE: _____
ADDRESS: _____
PHONE: _____ LOAN TERM (days): __ (use 99 for indefinite term)

          PUB DATE      PAGINATION
          /  \
DOCUMENT TITLE _____
_____
_____

SERIES TITLE _____ NUMBER _____
AUTHORS _____
_____
CONFIRM CHECK OUT - <Y>es/<N>o ==>
```

Make sure that this description matches the item being checked out. It is possible to enter a call number incorrectly, and therefore inadvertently check out the wrong item.

If you reply <n>o to the screen prompt, the check out record is cancelled and a new check out entry screen is displayed so that you can re-enter the information.

If you reply <y>es, the check out for that item is complete, and a message appears at the bottom of the screen asking if you want to check out any more items for the same borrower.

#### 4.1.4 Identifying an Uncataloged Item

If, on the other hand, the check out information indicates that the item is uncataloged (UNCAT), the bottom of the screen contains only an area in which to enter the title of the item (Figure 4.4).

Figure 4.4

```
CIRCULATION - CHECK OUT
-----
SITE CODE: _____
CALL NUMBER: uncat          (use UNCAT if document uncataloged)
COPY CODE: 1
BORROWER NAME: _____ (last name, first name)
AFFILIATION: -
OFFICE: _____
ADDRESS: _____
PHONE: _____   LOAN TERM: __ (use 99 for indefinite term)

TITLE
_____  

_____  

_____

Hit <F1> for help, <F5> to do checkout, <F9> to cancel or EXIT
```

Type in the title of the item being checked out. If it is a periodical, you may want to also add the volume and number of the periodical, or any other descriptive information.

When finished, confirm the check out at the bottom of the screen.

If you select <n>0, the check out record is cancelled and a new check out entry screen is displayed.

If you select <y>es, the check out for that item is complete, and a message appears at the bottom of the screen asking if you want to check out any more items for the same borrower.

#### 4.1.5 Lending Additional Items to the Same Borrower

If you indicate that you want to check out another item to the same borrower, the check out entry screen is displayed with all the information that you entered for the previous item, except for the call number and copy number.

Enter the call number and copy number (if any) of the next item being checked out, and press <F5> to repeat the check out process.

## 4.2 CHECK IN A DOCUMENT

To indicate that a borrowed item has been returned, or to extend the period of a loan, select *CHECK IN* from the *CIRCULATION MENU*.

To be able to use *CHECK IN* you need to know the call number and copy number (if any) of the items to be checked in. This information can usually be read off the spine label of the item being checked in.

However, if someone is renewing and they don't have the item(s) with them, you can check for the call number and copy number by looking at the *Circulation List Report* of materials currently on loan (see *Section 4.3: Report on Circulation*). If the borrower has checked out more than one item, you might try to distinguish among them by date borrowed.

After selecting *CHECK IN*, the following screen is displayed (Figure 4.5).

Figure 4.5

```
CIRCULATION - CHECK IN
-----
SITE CODE: _____
CALL NUMBER: _____ (use UNCAT if document uncataloged)
COPY CODE: T _____ (use only to show multiple copies)

Hit <F1> for help, <F5> to do check in, <F9> to cancel or EXIT
```

Enter the call number and copy number of the item being checked in (or UNCAT if the item is not cataloged), and press <F5>.

If the call number and copy information are not found among any check out records, the following message flashes on the screen:

*document not checked out*

Check for typographical errors.

#### 4.2.1 Checking in Cataloged Items

If a *LEND* record is found, it is displayed along with the title of the item (Figure 4.6).

Figure 4.6

```
CIRCULATION - CHECK IN
-----
SITE CODE: _____
CALL NUMBER: _____ (use UNCAT if document uncataloged)
COPY CODE: T _____ (use only to show multiple copies)

BORROWER NAME: _____
AFFILIATION: _____
OFFICE: _____
ADDRESS: _____
PHONE: _____
DATE LOANED:   /  /  
LOAN TERM: _____

TITLE
-----
-----
-----

CONFIRM check in - <Y>es/<N>o, <R>enew check out
or hit <X> to cancel an inadvertent check out ==>
```

If this information is correct, respond <y>es. The check out record is removed and you return to the initial *CHECK IN* screen (Figure 4.5). The item is also removed from the *Circulation List Report*.

If this information is incorrect, respond <n>o. It is possible that a typographical error was made in entering the call number. The displayed check out record is not removed. You return to the initial *CHECK IN* screen (Figure 4.5) so that you can enter the information correctly.

If the loan period is to be extended, respond <r>enew. The following message is then displayed:

*Enter new term (use 99 for indefinite loan)*

Type in the new loan period and press <Return>. The check out record and *Circulation List Report* are updated, and you return to the initial screen.

If somehow a check out record was incorrectly created, type the letter <x>. The check out record is removed and the transaction is cancelled from the circulation reports. You return to the initial screen.

#### 4.2.2 Checking in Uncataloged Items

If, on the first *CHECK IN* screen, you type in UNCAT instead of a call number, MicroDIS searches the check out records for all marked UNCAT. Each such record is then displayed, as in Figure 4.6, but one at a time.

As in the check in process for cataloged items, respond to the message at the bottom of the screen:

*CONFIRM check in - <Y>es/<N>o, <R>ENEW check out  
or hit <X> to cancel an inadvertant check out*

If the record displayed does not correspond to the item you are checking in, respond <n>o.

After you type in your response, the next UNCAT check out record is displayed and the above message is repeated, and so on. You must cycle through all UNCAT records before returning to the initial *CHECK IN* screen (although it is unlikely that there will be many UNCAT records).

### 4.3 REPORT ON CIRCULATION

To be able to run any of the three circulation reports, select *REPORT* on the *CIRCULATION MENU*.

The following *CIRCULATION REPORT MENU* is displayed (Figure 4.7).

Figure 4.7

```
***** CIRCULATION REPORT MENU *****
Overdue Notices
Collection Usage Statistics
Circulation List

EXIT

-----
PRINTER ONLY
-----
```

Select the *Overdue Notices Report* to print reminder notices to send to individuals who have borrowed materials but have not returned them within the loan period.

Select the *Circulation Usage Statistics Report* to generate a statistical report showing how often borrowed items have circulated.

Select the *Circulation List Report* to produce a list of all items currently out on loan.

Note that the *Overdue Notices Report* and the *Circulation Usage Statistics Report* can only be printed out. The *Circulation List Report* can either be printed out or displayed on the screen.

Each of these reports is discussed below.

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### 4.3.1 Overdue Notice Report

You can print overdue notices as frequently as desired: weekly, bi-weekly, monthly or whenever. When you select this option, MicroDIS looks at check out dates (automatically recorded) and the specified loan term, and determines which items are overdue. If no items are overdue, no notices print out.

Before you use this report, you may want to create some local overdue messages in the *Overdue Message Authority File*. These local messages will appear at the bottom of the *Overdue Notice Report*, below that standard information provided (see Figure 4.8).

When this report is requested, the following questions appear on the screen, one at a time:

*Name to appear on notice as sending party:*

*Return by date to appear on notice:*

*Should the report be ordered by <N>ame or by <C>all number?*

*Do you wish to start the report from a point other than at the beginning? (e.g.: previous run was interrupted) <Y>es/<N>o*

Respond to the first question by providing the name of the information center or the individual who is sending the overdue notices (e.g., the librarian).

Respond to the second question by indicating the date by which you want the documents returned. The date should be spelled out (e.g., May 1, 1988).

Respond to the third question to indicate the order in which you wish the overdue notices printed.

Respond <y>es to the fourth question only to indicate if the printing process was halted for some reason and you now want to run the rest of the notices. For example, the ribbon on your printer may have broken halfway through printing 50 notices. Since MicroDIS incrementally displays the number of each message during the printing process, check the screen if printing stops and note the next number to be printed. Enter this number when you resume printing and the following question is asked:

*Enter value to restart report with*

If MicroDIS cannot find this number, the following message appears and you return to the *CIRCULATION REPORT MENU*:

*Unable to find designated record ... report will terminate!*

If you respond <n>o to the fourth question, the next message asks you to:

**ALIGN PAPER IN PRINTER**  
and then hit <Spacebar> to continue

The screen is cleared and the following information displayed:

*Number of items in circulation:*       \*  
*Number of overdue notices printed:*   \*

The first number is the total number of documents on loan. The second number is increased by one as each overdue notice is printed.

A sample of this report appears below (Figure 4.8):

Figure 4.8

```
DATE: September 1, 1987
FROM: AID Library
TO:   Maury Brown
      CDIE/DI

SUBJECT: Return of document to the Library/DIC
Our records show that the document listed below is overdue.
Please return it to the Library/DIC by ... September 5, 1987.

If you find that you still require the document,
we will be happy to reissue it to you.

      PN-AAS-721                      COPY - 1

Small enterprise development program for Ecuador : strategy paper

      date borrowed -- August 15, 1987
      term of loan --- 7 days
      date due ----- August 22, 1987

(User defined overdue message may appear here; see Section 8.1:
MAINTAIN AUTHORITY FILES)
```

An additional, locally defined message can be added to the bottom of the report, for example to advise the borrower of the measures that will be taken if the overdue item is not returned (see the *SYSTEM UTILITIES* module for the *Overdue Message Authority File*).

When all overdue notices are printed, MicroDIS returns to the *CIRCULATION REPORT MENU* (Figure 4.7).

### 4.3.2 Collection Usage Statistics Report

This report is useful as a collection management and acquisitions tool. It displays the site code and call number of each item circulated (over whatever period of time you select) and indicates how many times each item has been borrowed. This number is then calculated as a percentage of the total number of loans (during that time period). It is thus easy to see which individual items, and what subject areas of the collection (call numbers) get the most use.

A brief example of the format of the report is as follows:

Figure 4.9

SITE CODE	CALL NUMBER	NUMBER LOANS	PERCENT OF TOTAL	PERCENT OF SITE
DEMO	ABCD.001	1	20.00	20.00
DEMO	DDDD.010	2	40.00	40.00
DEMO	DDDD.005	1	20.00	20.00
DEMO	ZZZZ.007	1	20.00	20.00

When this report is requested, the following questions appear on the screen:

*Should the circulation counters contained in the DOCUMENT database  
be reset to zero by this report program?*

*Respond <Y>es/<N>o*

It is your response to this question which determines the period of time covered by the report. For example, if you want to maintain usage statistics for six-month time periods, only reset the "counters" every six months. You can run the report as often as you like (e.g., monthly) to view cumulative results (just don't reset the counters).

When you reset the "counters" to zero, MicroDIS prints the last report for the recordkeeping period that is just ending (e.g., items circulated from January 1 to June 30, 1987). The next time you print the report, it reflects the cumulative statistics for the new recordkeeping period (e.g., items circulated since July 1, 1987).

There is no way of retrieving a previous set of circulation statistics once you reset the counters.

Thus, if you respond <y>es to this prompt, MicroDIS resets the circulation counter to zero when it has finished generating the circulation usage statistics. If you respond <n>o, MicroDIS retains these statistics and continues to increase the circulation counter as additional items are circulated.

Following your response to this question, MicroDIS clears the screen and displays the following message:

```
Records on database:      *
Record being processed:  *
```

The first number is the total number of items in the collection. The second number is increased as each catalog record is processed for the circulation usage statistics report. When all records have been processed, the system displays the message:

\*\*\*\*\* REPORT BEING GENERATED \*\*\*\*\*

This message indicates that the statistics are being computed and sorted. When this process is completed the report is printed and MicroDIS returns to the *CIRCULATION REPORT MENU* (Figure 4.7).

If no items are on loan, MicroDIS displays the following message before returning to the *CIRCULATION REPORT MENU*:

```
NO ITEMS have been circulated
Press <Spacebar> to continue ...
```

### 4.3.3 Circulation List Report

This report is a simple listing of all items in the collection which are currently in circulation. You may also elect to see only those items currently on loan to one person. The report can either be displayed on the screen, or printed out.

The report shows the call number of each item currently checked out, the name of the individual to whom the item has been checked out, their office, the date it was checked out, and the loan period. For example:

Figure 4.10

Call Number	Copy	Borrower Name	Office	Date	Term
TEST-001	1	GOSHEN, CAROLYN	DINF	02/10/88	14
TEST-010	1	BONALL, BRIAN	SDG	01/30/88	30

Press <F9> to EXIT ...

The entries in the report can either be sorted by call number, or in alphabetical order by author name.

When this report is requested, the following question appears on the screen:

*Should the report be ordered by <N>ame or by <C>all number?*

If you make no response, the report will be produced in site code/call number sequence. MicroDIS then asks:

*Do you wish to start the report from a point other than at the beginning? (e.g.: previous run was interrupted) <Y>es/<N>o*

Respond <y>es to this question to indicate if the printing process was halted for some reason and you now want to run the rest of the report. For example, the ribbon on your printer may have broken halfway through printing a list of 50 entries. Since MicroDIS incrementally displays the number of each entry during the printing process, check the screen if printing stops and note the next number to be printed. Enter this number when you resume printing and the following question is asked:

*Enter value to restart report with*

If MicroDIS cannot find this number, the following message appears and you return to the **CIRCULATION REPORT MENU**:

*Unable to find designated record ... report will terminate.*

If you want to print the report from the beginning, respond <n>o and the next message asks:

*Do you wish to see a specific patron? <Y>es/<N>o*

If you want to see the entries for a specific patron, enter the name in response to the following question:

*Enter name of patron to display*

MicroDIS then asks:

*Report to <S>creen or <P>rinter*

If you select <s>creen, MicroDIS displays the report on the screen. If you select <p>rinter, the report is printed out. After this question has been answered, MicroDIS displays the following message:

*Press any key to continue ...*

If you have selected the printer option, make certain that the paper is properly aligned before continuing.

When the report is completed, MicroDIS again displays the message:

*Press any key to continue ...*

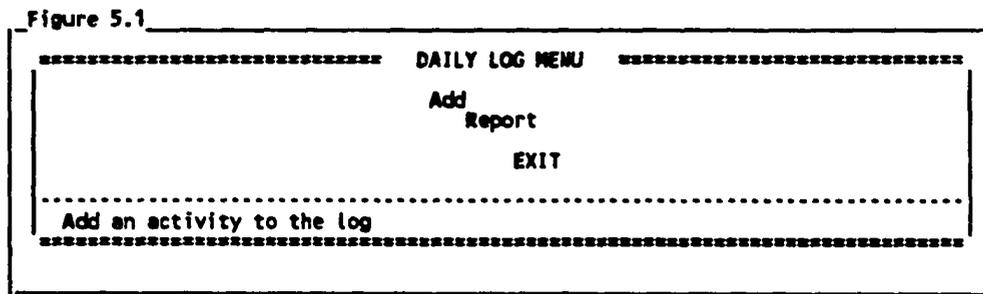
Upon depressing a key, MicroDIS returns to the **CIRCULATION REPORT MENU** (Figure 4.7).

## SECTION 5: DAILY LOG

### 5.0 INTRODUCTION

The *LOG* option on the *MAIN SELECTION MENU* provides access to the *DAILY LOG* module. The purpose of this module is to assist information centers in keeping statistics on levels of activity. These statistics can then be used in various ways by management, e.g., to monitor workload patterns and trends in information center use, or to document the center's staff and budget needs.

The *DAILY LOG* module contains two functions, which appear as follows on the *DAILY LOG MENU* (Figure 5.1).



Select *ADD* to record an activity. As will be discussed in more detail below, several routine activities are automatically recorded by MicroDIS (e.g., circulation transactions). You therefore only need to use this function to record other special services that your center needs to keep track of (e.g., photocopying, bibliographies issued, etc.).

Select *REPORT* to display on the screen or to print the *Daily Log Activity Report*.

## 5.1 ADD A LOG RECORD

To record an activity, fill in the highlighted areas in the *DAILY LOG DATA ENTRY* screen (see Figure 5.2 below).

Figure 5.2

```
DAILY LOG DATA ENTRY
-----
Service Codes
-----
A -> Purchasing                (entered automatically)
B -> Circulation                (entered automatically)
C -> Catalog Update            (entered automatically)
D -> Catalog Search            (entered automatically)
E -> Reserved for future use
F -> User Defined
G -> User Defined
H -> User Defined
I -> User Defined
J -> User Defined

AFFILIATION: -
OFFICE: _____
SERVICE: _____ (see above codes)
VOLUME: - 0

Hit <F1> for help, <F5> when done, <F9> to cancel or EXIT
```

On this screen, service codes A through D are assigned to activities which MicroDIS automatically records for you each time you perform the corresponding function. Note that MicroDIS is not recording just the number of items ordered, loaned or added to the catalog, but the number of times a transaction is completed -- an addition, modification or deletion. In this sense you are monitoring the level of staff activity. (To see only the number of records currently in the Acquisitions, Circulation or Catalog databases, check the *SYSTEM UTILITIES* module for the *SYSTEM SNAPSHOT*).

Any of the letters which are labeled as **USER DEFINED** can be assigned locally as needed to record other types of activities. Such activities might include photocopying for patrons, routing of periodicals, clipping of newspaper articles, or dissemination of acquisition lists/special bibliographies/ information packets. To assign these user defined codes, go to the *SYSTEM UTILITIES* module to maintain the *Daily Log Activity Codes Authority File*.

To record an activity for any of the user defined categories, fill the highlighted areas at the bottom of the screen. All four fields must be filled in as follows:

### AFFILIATION:

Indicate the affiliation of the person for whom the service was performed, using a code from the *User Affiliation Codes Authority File* maintained in *SYSTEM UTILITIES*. (You can designate and use a code for "none", "unknown" or "not applicable.")

**OFFICE:**

Indicate the name of the office in which the person works. If unknown, type "none" or "not applicable".

**SERVICE:**

Enter the letter code corresponding to the activity performed.

**VOLUME:**

Indicate how much work was performed (e.g., the number of pages photocopied, the number of periodicals routed, etc.).

When you have finished entering this information, press <F5> to record the activity in the *DAILY LOG*.

If data is missing in any field, or if the user affiliation code or activity code do not match any of the codes in the corresponding authority files, MicroDIS tells you which error you have made. You can then make the correction and press <F5> again, or press <F9> to cancel the entry.

To proceed with adding the data, respond to the next MicroDIS prompt:

*Would you like to begin a new entry? <Y>es/<N>o  
Confirm log entry valid - <Y>es/<N>o*

If you respond <n>o, MicroDIS clears the data entry screen so that you can re-enter the correct information.

If you respond <y>es, the data is added to the log. After the record is logged, MicroDIS displays the following question:

*Would you like to begin a new entry? - <Y>es/<N>o*

If you respond <y>es, the *DAILY LOG DATA ENTRY* screen (Figure 5.2) is displayed again. If you respond <n>o, MicroDIS returns to the *DAILY-LOG MENU* (Figure 5.1).

## 5.2 REPORT ON LOGGED ACTIVITIES

There is one reporting format available for the display or printing of the *DAILY LOG* statistics. Figure 5.3 illustrates a sample of the report format.

Figure 5.3

Daily Log Activity Summary					
Date: 06/01/88					
A - Number of occasions that the module was accessed.					
B - Total number of activities that were performed (records updated, searches done, items circulated)					
	ACQUISITION	CIRCULATION	CATALOG	SEARCHING	
	*****	*****	*****	*****	*****
A -->	2	3	22	37	0
B -->	6	6	44	57	0
	*****	*****	*****	*****	*****
A -->	0	0	0	0	0
B -->	0	0	0	0	0
Press <F9> to EXIT ...					

The second row is automatically labelled with any user defined activity categories that are assigned by each site using the *Daily Log Activity Code Authority File*.

Once you select this *REPORT* option, MicroDIS asks the following series of questions:

*Daily Log -- Activity Report*

*Do you want this report presented on the <S>creen or <P>rinter?*

*Enter either <S/P>*

*What should the starting date of this report be?*

*If you want a report of all activities in the log hit <Return>, otherwise enter date you want the report to start with.*

*(MM/DD/YY)    \_/\_/\_*

*What should the ending date of this report be?*

*To have the report end with the last entry, press <Return>, otherwise enter the date you want the report to end with.*

*(MM/DD/YY)    \_/\_/\_*

Finally, MicroDIS gives you the option of keeping these statistics for inclusion in the next report, or clearing the log. For example, if you want the report to show the level of activity for each week, you will want to clear the log after running the weekly report. If you only want to quickly view the report on the screen, you might want to keep the log statistics so that they can be printed at some later time.

*Should the log be cleared upon completion of this report?*

*Enter <Y>es/<N>o*

It may take MicroDIS several minutes to generate the report, depending on how much data is in the log.

When the report is completed, MicroDIS displays the message:

*Press <F9> to EXIT ...*

You then return to the *DAILY LOG MENU*.

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## SECTION 6: DOCUMENT CATALOG

### 6.0 INTRODUCTION

The document catalog is the central guide to the content and location of all major items in a library or information center's collection.

Traditionally, catalogs have been paper-based, relying on manual procedures for creating, maintaining and using individual catalog cards. In the computer-based MicroDIS *DOCUMENT CATALOG* module, these procedures are automated, helping you to work with the catalog more efficiently.

In order to create, maintain and search the Catalog Database, select the corresponding option from the *CATALOG MENU* (see Figure 6.1 below).

Figure 6.1

```
***** CATALOG MENU *****
      ADD
      MODIFY
      DELETE
      SEARCH
      REPORT
      CATALOG UTILITIES
      EXIT
-----
Create new catalog entries
-----
```

Select *ADD* to enter new document records into the catalog database on a routine basis. MicroDIS successively displays three data entry screens, providing space to fill in the data for each field in the MicroDIS catalog record. To add records to your database from other MicroDIS users, or send your records to them, use the *CATALOG UTILITIES*.

Select *MODIFY* to change any data in individual catalog records except the site code/call number. For example, you might want to modify the number of copies, or to add information in the notes field. If you need to change the document identification number, use the *CATALOG UTILITIES*.

Select *DELETE* to permanently remove a record from the catalog database. For example, if you eliminate or lose some items in the collection, you will want to be sure to delete them from the database.

Select *SEARCH* to check the catalog database for a particular item or group of items. MicroDIS will tell you how many items in the catalog match your search request. You can then further modify the search request, display the items found on the screen, and/or print the items found on paper.

Select *REPORT* to print-out (1) proof sheets for editing new records, or (2) new acquisitions lists, or (3) the entire database. Entries in entire database reports can be sorted in various ways (e.g., by call number, by author, by subject keyword, etc.). Because of the length of time required to process entire database reports, most are not recommended for information centers with large collections. See *Section 6.5: REPORT ON CATALOG DATABASE* for more details.

Select *CATALOG UTILITIES* to send/receive records from another MicroDIS site, to modify the document identification number in a particular record (i.e., to recatalog), or to periodically verify the fast access files against the utilities as special purpose tools that you need to have, but only use infrequently.

## 6.1 ADD A CATALOG RECORD

### 6.1.1 Overview

There are two ways to add records to the catalog database:

1. Select *ADD* to enter local catalog records for your site.
2. Select *CATALOG UTILITIES* to *RECEIVE* records on floppy disk from another MicroDIS site. Once loaded into your database, you can search these records without modification (the site code/call number indicates items held by another site). Or, to reduce the time required for local cataloging, you can match received catalog records against materials in the local collection, change the site code/call number for those that match, and modify other fields as desired to reflect local cataloging guidelines. Any records which do not match can then be deleted.

The emphasis of this section is on the processes associated with (1) above.

The next three sub-sections describe the MicroDIS catalog record, and the detailed cataloging rules and options for each field in the record. The process of using the MicroDIS data entry screens to create each catalog record is described in *Section 6.1.5: Data Entry Procedures*.

### 6.1.2 The MicroDIS Catalog Record

The MicroDIS catalog record is made up of 20 fixed-length fields. You are prompted to enter data into these fields on three data entry screens, although you are not required to enter data into all of the fields. These three screens appear as follows:

Figure 6.2

```
DOCUMENT CATALOG - DATA ENTRY SCREEN #1
=====
SITE CODE: _____ CALL NUMBER: _____
COPIES: _____ LOCATION(S): _____
FORMAT(S): _____ BIB TYPE: _____

TITLE
-----
-----

SECOND TITLE
-----
-----

SERIES _____ NUMBER _____

AUTHORS
1. _____
2. _____
3. _____
4. _____
5. _____

<F1> for help, <F2> for authority files, <F5> to continue add, <F9> to EXIT.
```

Figure 6.3

```
DOCUMENT CATALOG - DATA ENTRY SCREEN #2
=====
PAGINATION: _____ PUB DATE: __/__/__ (YY/MM or MD)
LANGUAGE 1: _____
          2: _____
NOTES
-----
-----
-----
-----

Hit <F1> for help, <F5> to continue add, <F9> to EXIT.
```

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Figure 6.4

```

DOCUMENT CATALOG - DATA ENTRY SCREEN #3
*****
DESCRIPTORS
1: _____
2: _____
3: _____
4: _____
5: _____
6: _____
7: _____
8: _____
9: _____
10: _____

IDENTIFIERS
1: _____
2: _____
3: _____
4: _____
5: _____
6: _____
7: _____
8: _____
9: _____
10: _____

Hit <F1> for help, <F2> to add/view keywords, <F5> to start add, <F9> to EXIT.
    
```

The chart below lists these fields in the order in which they appear on the data entry screens, indicating whether you must enter data into the field, the maximum number of characters that you can enter, whether the contents of the field are validated for data present or against an authority file, and whether the contents of the file are indexed into a fast access file.

Figure 6.5

Field name	Description	Characters	Required	Validated	Fast Access
SITE CODE	MicroDIS site code	10 (C)	yes	yes	
CALL NUMBER	class + shelf number	25 (C)	yes	yes	yes
COPIES	number of copies	1 (N)			
LOCATION	location within agency	10 (C)	*		
FORMAT	physical format code	2 (C)	*		
BIB TYPE	bibliographic type code	2 (N)	*	yes	yes <sub>1</sub>
TITLE	primary title	250 (CL)	*		yes <sub>1</sub>
SECOND TITLE	secondary title	250 (CL)	*		yes <sub>1</sub>
SERIES	series name/title	70 (CL)	*		yes <sub>2</sub>
AUTHOR1	first author/sponsor	77 (CL)	*	yes	yes <sub>2</sub>
AUTHOR2	second author/sponsor	77 (CL)		yes	yes <sub>2</sub>
AUTHOR3	third author/sponsor	77 (CL)		yes	yes <sub>2</sub>
AUTHOR4	fourth author/sponsor	77 (CL)		yes	yes <sub>2</sub>
AUTHOR5	fifth author/sponsor	77 (CL)		yes	yes <sub>2</sub>
PAGINATION	number of pages/pieces	25 (N)	*		
PUB DATE	date of publication	5 (N)	yes	yes	
LANGUAGES	2 languages of text	2 each (C)	*		
NOTES	notes	500 (CL)			
DESCRIPTORS	10 controlled terms	40 each (C)	*	yes	yes <sub>3</sub>
IDENTIFIERS	10 non-controlled terms	40 each (C)	*	yes	yes <sub>3</sub>

The letters after the number of characters indicate the following: C = automatically appears in capital letters on the screen and in printouts, regardless of how typed, CL = appears exactly as typed, N = numeric.

The fields marked with an asterisk (\*) in the "required" column above are not required by MicroDIS, but entry of data in these fields is recommended for creation of a reasonably complete citation.

Numbers in the "fast access" column indicate that those fields are combined by MicroDIS into the same fast access file for search and retrieval purposes. For example, the *Title Fast Access File* contains words from three related fields: title, second title and series title. This is discussed in more detail in *Section 6.4: SEARCH THE CATALOG*.

More detail on the content, special features and validation of each field is included in *Section 6.1.4: MicroDIS Cataloging Guidelines*.

Instructions on how to use MicroDIS for entry of data in each screen are provided in *Section 6.1.5: Data Entry Procedures*.

### **6.1.3 Local Cataloging and Data Entry Options**

Although the fields in the catalog database record are fixed in order to facilitate exchange of records among MicroDIS users, each site has quite a bit of flexibility in determining its own policies and procedures for cataloging and entry of data.

Local policies. Each site needs to establish policies concerning:

- o use of non-required fields -- since data does not have to be entered in all fields, you may elect to routinely omit some of them from the catalog record (e.g., languages of text or notes) if they are not appropriate to your needs.
- o content of fields -- in many fields, you need to determine what data to enter, e.g., what codes you want to use, what you want to put in the notes field, what local identifiers are needed to supplement descriptors.
- o format of data in the fields -- in the fields in which data appears exactly as typed, you can determine what format you want to use at your site (e.g., author names in all capital letters, surname only in capital letters, entire name in capital and lower case, etc.).

Procedures. Further, each site needs to establish its own cataloging and data entry procedures, based on the number of staff and terminals available, cataloging experience, and so forth. For example, you could:

- o complete the entire catalog record on paper, and then simply copy that information during data entry.
- o catalog only the site code/call number and subject keywords on paper in advance, completing the rest of the cataloging during data entry.
- o simultaneously catalog a document and enter the data at the terminal.

In order to help you determine these policies and procedures, it is strongly recommended that you:

1. Review the MicroDIS cataloging guidelines
2. Review the data entry procedures
3. Modify these guidelines as appropriate to your local requirements.

**Consistency.** For ease of maintaining and retrieving records in the catalog database, it is also recommended that you consistently follow one set of local guidelines over time, especially for the data in fast access fields. Similarly, if you anticipate exchanging databases with a known group of users, it is recommended that you share the same local guidelines.

#### **6.1.4 MicroDIS Cataloging Guidelines**

The following pages provide detailed information on rules, recommendations and options for cataloging and formatting data in each field. Fields are listed in the order in which they appear on the three MicroDIS data entry screens. Data entry and validation features specific to a field are noted as relevant.

##### **SITE CODE**

Required field, max length 10.

This is a unique code which is pre-assigned to each MicroDIS installation. Internally, MicroDIS stores this as a three-digit numeric code. On the screen, it appears as an abbreviated name code, up to 10-characters in length. For example, internally your assigned site code might be stored as 001; on all screens you will see and use the code name EG-DIC. MicroDIS comes with a list of site numeric codes, site name codes and descriptions is maintained in the *Site Code Authority File*.

The site code and call number together form a unique identification number for each cataloged document, relative to all documents cataloged by all MicroDIS users. A site code must therefore be present before a record can be added to the catalog database.

## **CALL NUMBER**

Required field, max length 25.

This is a unique number assigned to each document for purposes of shelf arrangement. The number has two components: a subject class code, and a shelf number (also called a "Cutter" number).

The purpose of the subject class code is to keep items on the same subject together on the shelves. There are many subject classification schemes that can be used, such as the *A.I.D. Thesaurus* notation, the USAID Classification Scheme notation, FAO/AGRIS codes, Universal Decimal Classification (UDC), and locally developed schemes. In each scheme, a number or alpha-numeric code designates major subject categories and sub-categories.

The purpose of the shelf number is to identify the physical placement of an item relative to all others in the same subject class. The shelf number can be a purely sequential accession number assigned to each item as it is acquired and cataloged (e.g., 001, 002, etc.), or to each item within the same class (e.g., 001 could be used once in each class). The shelf number can also begin with one or more alphabetical letters corresponding to the author's last name (e.g., Aa for Aagard, Ne for Nelson).

The combined subject class code and shelf number uniquely identify a document relative to all other documents in a given collection.

The subject class code and shelf number should be consistently separated by the same form of punctuation (e.g., a period, dash, slash, or colon), without any additional spaces.

Examples:

Class code (USAID Classification Scheme): AA41 (Food Policy)  
Shelf number (Accession number): 1050  
ENTER: AA41.1050

Class code (Dewey Decimal Classification Number): 301.35 (Land Reform)  
Shelf number (3 character of author surname, e.g., Atwell): Atw  
ENTER: 301.35-Atw

Class code (FAO AGRIS Code): AE10 (Agricultural Economics)  
Shelf number (sub-category and accession number): AAF-304  
ENTER: AE10.AAF-304

A document series can be shelved together by assigning the same beginning call number to all documents and appending a two-digit sequence number.

Example:

AE10-AAF-304.01 (first in a series)  
AE10-AAF-304.02 (second in a series)

Data entry feature: MicroDIS provides a short-cut entry feature to users who assign the shelf number sequentially within each class (e.g., AE10.001, AE10.002, AE10.003), or who catalog a document series as in the example above. In these instances:

1. Type in the call number, including punctuation, up to the point where the sequential number begins. Then type an equal sign (e.g., AE10.=). Note: this feature only works if every character replaced by the = sign is a number (i.e., not a mixture of letters and numbers).
2. When you process the data on that screen, MicroDIS automatically finds the last sequential number entered in that class (AE10), increases it by one, and assigns the new call number to the new record. For example, if the last number used was AE10.050, MicroDIS assigns the next shelf number in that class as AE10.051.
3. You can see the number assigned after all three Data Entry Screens are completed by either: (1) reviewing the record before it is added (the full call number will be displayed on Data Entry Screen #1), or, (2) checking the call number when it is displayed as the record is added. (See the section on *Data Entry Procedures* for more details on this step).

Validation: Each site has the option of using a call number prefix validation feature. Up to six characters in this field can be validated against the *Call Number Prefix Authority File* during data entry to help you avoid making errors in assigning or typing the number. This feature can be set up during initial installation of MicroDIS (see the Installation Instructions concerning Configuration), or anytime thereafter (see *SYSTEM UTILITIES -- CONFIGURE* and *MAINTAIN AUTHORITY FILES*).

### COPIES

Non-required field, max length 1.

The data in this field indicates the number of copies of the document the center possesses. MicroDIS automatically assumes that the number is 1 and puts this number in the copies field. To change the number during *ADD* or *MODIFY*, just type over the 1.

## LOCATION

Non-required field, max length 10.

Use this field to tell where a document is currently located if the collection is decentralized, e.g. in the information center, or in someone's office. This is not a shelf location. If materials are only held in one location, it is not necessary to use this field.

The location can be entered as a code, abbreviation or full name. Each site should develop and maintain a list of its own codes or abbreviations to ensure consistency in data entry (e.g., M = mission director's office, L = legal office, H = health and population project). Codes may be kept short so that if there is more than one copy of a document, several codes can be entered in the same field. Alternatively, the location of the additional copies may be indicated in the notes field.

## FORMAT

Non-required field, max length 2.

The data in this field describes the physical format(s) of the item. Each site can develop its own codes. If cataloged materials are in only one format, it is not necessary to use this field.

Suggested codes are:

- P = Paper copy
- M = Microfiche
- PM = Both paper and microfiche
- V = Videotape

## BIBLIOGRAPHIC TYPE CODE (BIBTYPE)

Non-required field, max length 2.

This field is used to indicate the bibliographic type of the document, e.g., reference work, conference proceedings, planning study, final report, evaluation.

MicroDIS comes with a list of codes loaded into the *Bibtype Code Authority File* which is based upon those used by A.I.D.'s Development Information System (DIS). As this set of codes may not be appropriate to all MicroDIS sites, it should be reviewed on installation and modified locally as appropriate.

Validation: While entry of data is not required in this field, if a code is entered it should match a code in the *Bibtype Code Authority File*.

## TITLE

Non-required field, max length 250.

Select the title by which the document is most likely to be cited; this will usually be the title on the title page (not the outer cover.) Enter the title (and subtitle if there is one) exactly as it appears on the document.

Note that MicroDIS inverts only words or alphanumeric values (e.g., FY87) into the *Title Fast Access File*. This means that you will not be able to search for any numeric values (e.g., 1987) that appear in titles. Insignificant title words (i.e., those maintained in the *Title Stopword Authority File*), are also automatically excluded from the *Title Fast Access File*. The same is true for a second title and series title.

The following guidelines are optional but recommended:

IF you plan to create a paper copy of your database sorted by the first word in the title, omit leading articles (i.e., A, An, The, El, La, Los, Las, Le, Les, etc.) except when they form part of a name, e.g., "Los Angeles". Otherwise MicroDIS will sort on these articles when you print the *Title Report* (see *Section 6.5: REPORT ON CATALOG DATABASE*).

Capitalize the first word of the title. Enter all other words in the title in lower case, except for words that would normally be capitalized in the language of the document, e.g., proper nouns.

When a subtitle is used, precede the subtitle with a colon and space. If it designates the type of document (i.e., final report, annual report, feasibility study, etc.) it is separated from the title by a semi-colon, e.g. Middle management education program; final report.

Represent dashes with a "space hyphen space", e.g. Brackish water fisheries production project - Indonesia. This ensures that the words "project" and "Indonesia" are stored by MicroDIS as separate words.

### Special cases --

**Non-English titles:** If the title is not in English, enter the foreign title in the title field. Translate the title into English (if you can) and enter the translated title into the field for second title. If your printer accepts alternate character sets, you may want to enter the non-English title with accent marks (see *Section 9.7: USING AN INTERNATIONAL CHARACTER SET*).

**Parallel titles in several languages:** If the title appears on the title page in several languages, select as the first parallel title the first title appearing on the document. Separate parallel titles with " = " and capitalize the first letter of each title. Example: Directory of contraceptives = Repertoire des contraceptifs = Guia de anticonceptivos.

## **SECOND TITLE**

Non-required field, max length 250.

This field is used for inputting the English translation of a document written in another language.

It is also used for recording the generic title (the title of the monograph or collection from which the document in hand has been extracted.)

Example:

Title: On - farm trials in northwestern Syria: testing the feasibility of annual forage legumes as grazing and conserved feed

Second Title: Research methodology for livestock on - farm trials: proceedings of a workshop held at Aleppo, Syria, 25-28 March 1985

When the document has been extracted from a serial, the title of the serial is not recorded in Second Title field but in the Series field.

The general rules for cataloging the title also apply to the second title.

## **SERIES**

Non-required field, max length 70.

Records the title of the serial of which the document unit is a part, e.g.

the title of a periodical, yearbook, or newspaper from which an article has been extracted, or

the title of a monographic series of which an individual book, report, etc. is a part.

Abbreviate the series title as necessary to fit the length of the field.

Definitions --

**Serial:** This is a series issued in successive parts. It is intended to be continued indefinitely. Serials are usually issued by the same publisher or organization, and are in a uniform style and format. Serials include: periodicals, newspapers, annual reports, yearbooks.

**Monographic series:** A group of separate items issued in succession and related to one another by the fact that each bears, in addition to its own title, a common title applying to the group of separate items as a whole. Each issue in a monographic series has its own pagination.

**Data entry feature:** To save repetitive typing, a lengthy series title which is cataloged frequently can be entered as follows: equal sign, no space, series title acronym (e.g., =ARDA). When MicroDIS processes the data on that screen, it sees the equal sign and translates the acronym into the full series title (e.g., A.I.D. Research and Development Abstracts). The full title is what is stored in the record. Valid acronyms are determined by each site (maximum 10 characters) and maintained in the *Author/Series Acronym Authority File*. If you want the series title to appear as an acronym, simply enter it as such without the preceding equal sign.

**Validation:** Series title acronyms which are preceded by an equal sign are checked against the *Author/Series Acronym Authority File* for decoding.

### SERIES NUMBER

Non-required field, max length 8.

Enter the abbreviations for volume, number etc. The following abbreviations are suggested:

volume	v.
number	n.
supplement	suppl.
part	pt.

When both a volume and issue number are used, follow the volume number by the issue number in parentheses. It is suggested that you convert Roman numerals into Arabic numbers.

**Example:** The document unit is an article from the periodical, *Canadian Geographer*, volume 13, number 3.

Series: Canadian geographer  
Number: v.13(3)

**Example:** The documentary unit is volume V, part 1 of *Economia e Financas*.

Series: *Economia e financas*  
Number: v.5(1)

**Example:** The documentary unit is issue 10 in the *Current Report of the Australian Institute of International Affairs*.

Series: *Current report / Australian Institute of International Affairs*  
Number: n.10

## **AUTHOR**

Five non-required fields, each with max length of 77.

The author field records the names of persons or institutions responsible for the intellectual content of the document - authors, editors, compilers, corporate authors, funding agencies, etc. Where more than five authors are present, it is up to each site to determine how many of each to enter.

Personal authors --

Do not enter names of translators, illustrators, persons writing the introduction or preface, etc.

Enter the full name, family name first, followed by a comma and a space, and the given name(s) or initial(s).

Examples:

Majid, Abdul  
Shah, Nighat A.  
Mulligan, Paul F., Jr.  
Szepesy, E.J. III

When there is more than one family name, begin the entry with the last family name. Example: Amadi Kane Diallo would be entered as Diallo, Amadi Kane.

Do not separate a hyphenated name or a name known to be compound, as is often the case with Spanish names.

Examples:

Ndong-Ondo, J. Frederic  
Hyde-Smyth, Gerald  
Montenegro Caldamez, Maria  
Abdul Quasim, Mohammed

When it is not possible to identify a family name, copy the full name, exactly as it appears on the documentary unit, without adding any punctuation.

It is recommended that you limit the number of personal authors to two. In this case, select the principal authors, if indicated, or else the first two mentioned. This would make room for necessary corporate authors or sponsoring institutions.

Institutions --

These include corporate authors and sponsoring institutions.

**Corporate Authors:** If there are two or more corporate authors and no determination can be made as to which is the principal corporate author then list in the same order as appears on the document. It is recommended that you list corporate authors before sponsoring institutions. If the corporate author has several subordinate bodies, list in descending order.

**Examples:**

Morgan Stanley & Co.  
Academy for Educational Development, Inc.  
Coopers & Lybrand Associates, Ltd.  
Southern Illinois University. College of Business and Administration

**Sponsoring Institutions:** These are defined as bodies which funded the production of the document or the project responsible for the production of the document. Often a sponsoring institution is the ministry of a country; in this case enter the country name first followed by a period and a space and then the ministry name.

**Examples:**

Ecuador. Ministry of Integrated Rural Development  
Egypt. Ministry of Agriculture

In the case of institution names there is often a need to abbreviate in order to fit within the 77-character limit of the field. Enter A.I.D. mission names as USAID followed by a slash and the country name. For example, enter A.I.D. bureau/office names by using standard abbreviations for bureau and omitting "office of" but putting the remainder of the office name.

**Examples:**

USAID/Egypt  
S&T/Agriculture

**Data entry feature:** As with series titles, it is possible to save repetitive typing of lengthy institution names. Frequently cataloged names can be entered as follows: equal sign, no space, author acronym (e.g., =IMF). When MicroDIS processes the data on that screen, it sees the equal sign and translates the acronym into the full series title (e.g., International Monetary Fund). The full name is what is stored in the record. Valid acronyms are determined by each site (maximum 10 characters) and maintained in the *Author/Series Acronym Authority File*. If you want the institution name to appear as an acronym, simply enter it as such without the preceding equal sign.

**Validation:** Author acronyms which are preceded by an equal sign are checked against the *Author/Series Acronym Authority File* for decoding.

## **PAGINATION**

Non-required field, max length 25.

Enter the pagination or the number of physical pieces in the document.

The following formats are recommended:

Use standard abbreviations such as "p." for pages and "v." for volumes.

For a monograph, enter the number of pages in the major sequence of numbered pages.

For an extract from a serial or monograph, enter the first and last pages separated by a hyphen.

For a collection, enter the number of physical pieces.

When pages are in various sequences of pages numbered or unnumbered then count or estimate and enclose in brackets.

Note presence of appendices, attachments, annexes. Detailed descriptions of these can be mentioned in the *notes* field if desired.

**Example:** A monograph contains 194 numbered pages in the major sequence of numbered pages.

Enter: 194p.

**Example:** A monograph contains various sequences of pages numbered and unnumbered.

Enter: [43]p.

**Example:** A multivolume collection contains 6 volumes.

Enter: 6v.

**Example:** A chapter in a book is on page 19 to 83.

Enter: p.19-83

**Example:** An article in a periodical, not continuously paged, is on pp 27-40, 44, and 46-57.

Enter: p.27-40, 44, 46-57

**Example:** A monograph contains approximately 200 pages.

Enter: [200]p.

Example: A project paper contains 145 pages as well as various annexes.

Enter: 145p. + annexes

**PUB DATE**

Required field, max length 5.

This field records publication date or issue of the document, i.e., date of publication of a book, report, or non-serial collection, issue date of a serial (when document is a contribution to a serial), or date of submission of a thesis or dissertation.

Required format: YY/MM (year/month, e.g., 87/01)

ND (if no date can be identified)

**Recommendations:**

Select the date of publication as found on the document.

**Copyright date:** When the document bears both a copyright date and a date of publication, select the date of publication.

**Edition:** When the document is a second or subsequent edition, select the date of publication of that edition.

**Reprint:** When the document is a reprint, select the date of reprinting. Enter the original date of publication as part of a reprint note in the note field.

**No date:** When no date of publication is specified, supply a probable date of publication by checking references, tables, etc. and selecting the latest date mentioned. If no probable date can be determined, enter "ND".

**Span of dates:** When a document is published over more than one year, select the end dates.

**A.I.D. Documents such as Project Evaluation Summaries (PES's), Evaluation Summaries (ES's), and Project Papers:** Select the date the Mission or A.I.D./W Office Director approved the document.

## LANGUAGES OF TEXT

Two non-required fields, each with max length of 2.

This field identifies the languages of the text of the document being analyzed. It is optional to enter data in this field if the document only appears in the same language as the title (i.e., if there is no translated title). If the document is written in more than one language, use the second language code field.

The specific codes used are up to each site. Regardless of how entered, they will automatically appear in capital letters. Recommended codes are:

EN = English  
ES = Spanish  
AR = Arabic  
FR = French

If the translation is a separate document, enter only the language of the version in hand and cross-reference the other language version(s) in the note field. Use the abbreviation "ed." for edition.

Example: Call number 310.001 is assigned to the English version of a contractor report. Call number 310.002 is assigned to the Spanish translation of the report.

Document 310.001  
Language: EN  
Notes: Spanish ed.: 310.002

Document 310.002  
Language: ES  
Notes: English ed.: 310.001

## NOTES

Non-required field, max length 500.

This field can be used to record information about the document which cannot be entered in any other field, or to enter a short abstract.

Example: A reference book is published by Gale Research Co.

Notes: Published by Gale Research Co.

Example: A document is available in English and in Spanish.

See languages of text above.

Example: Document titled "Where There Is No Doctor" is an English translation by C. Powell.

Notes: Translated from the Spanish by C. Powell; original title: Donde no hay doctor

Example: Originally published under the title: Give us the tools.

Notes: Reprinted from: Themes on Pacific lands by M.C.R. Edgell and B.H. Farrell, 1974, p.5-15

Example: An A.I.D. capital assistance paper, prepared for the Development Loan Committee, is entitled "Indonesia: West Java Interim Generation (Amendment)". The lower left-hand corner has the number A.I.D./DLC/P-1081/2.

Notes: A.I.D./DLC/P-1081/2

Example: Document is available in both paper and microfiche.

Notes: Microfiche identification number: AD0023

### DESCRIPTORS

Ten non-required fields, max length of 40 each.

Descriptors are subject and geographic keywords selected from a controlled vocabulary to describe the content of the document being cataloged. A.I.D. missions may wish to use the *A.I.D. Thesaurus* or USAID Classification Scheme for this purpose. Other MicroDIS users may select any controlled vocabulary of their choice.

Descriptors appear in all capital letters, regardless of how they are entered.

All descriptors in use by each site are maintained in the *Subject Keyword Authority File*. (A Y in the left column of this file indicates that the term is part of the controlled vocabulary.) Descriptors can be added to this file either at the time of catalog record entry, or through the *SYSTEM UTILITIES -- MAINTAIN AUTHORITY FILES* option.

If more than ten descriptors are needed, you can enter them in the identifier field.

**Data Entry Features and Validation:** When you process Data Entry Screen #3 containing the descriptors and identifiers, an error message will be displayed beside each subject keyword which does not appear in the *Subject Keyword Authority File*. You then have an opportunity to correct the spelling and/or add the term to the authority file.

Note that MicroDIS does not come with a complete controlled vocabulary loaded into the *Subject Keyword Authority File*. Rather, the file contains only those descriptors which have been checked by each site against their designated controlled vocabulary and added through the process of cataloging or authority file maintenance.

### **IDENTIFIERS**

Ten non-required fields, max length of 40 each.

These fields contain locally assigned keywords which are referred to as identifiers. Just like the descriptor field, the identifier field contains subject and geographic keywords which reflect the content of the document being cataloged. However, these are terms not found in the controlled vocabulary selected by the information center for cataloging purposes. Identifiers appear in all capital letters, regardless of how they are entered.

A.I.D. project or contract numbers can also be entered here, as can names of institutions which are not sponsoring agencies of the document, but which figure prominently in the contents.

Identifiers cannot be entered in the descriptor fields.

All identifiers are maintained in the *Subject Keyword Authority File*. (An N in the left column of this file indicates that the term was added as a local keyword.) Identifiers can be added to this file during catalog record data entry, or by using the *SYSTEM UTILITIES -- MAINTAIN AUTHORITY FILE* option.

Identifiers in the authority file can also be converted to descriptors if necessary by modifying the "N" flag in the authority file to a "Y" flag.

Example: An A.I.D. project paper refers to joint funding of a planned project by several other donor agencies.

#### **IDENTIFIERS**

1. Asian Development Bank
2. World Bank
3. Overseas Development Agency

Example: A report entitled "Hydrographic Study" focuses on the Suez Canal.

#### **IDENTIFIERS**

1. Suez Canal

**Data Entry Features and Validation:** When you process Data Entry Screen #3 containing the descriptors and identifiers, an error message will be displayed beside each subject keyword which does not appear in the *Subject Keyword Authority File*. You then have an opportunity to correct the spelling and/or add the term to the authority file.

#### **6.1.4.1 The MicroDIS Bibliographic Data Entry Sheet**

The sample data entry sheet on the following page lists the fields of the MicroDIS catalog record in the order in which they appear in the data entry screens. The sheet also includes sufficient space for jotting down as much cataloging information as you like before beginning data entry.

Remove this sheet from the binding and make copies as needed to assist in the cataloging process.

13

# MICRODIS BIBLIOGRAPHIC DATA ENTRY SHEET

<b>Site Code</b>	<b>Call Number</b>	<b>Series</b>	<b>Location</b>	<b>Format</b>	<b>Bib Type</b>
------------------	--------------------	---------------	-----------------	---------------	-----------------

**Document Title**

**Second Title**

**Series Title** **Series #**

**Authors**

- 1.
- 2.
- 3.
- 4.
- 5.

**Publication** **Pub Date (yy/mm)** **Language**

**Notes**

**Descriptors**

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

**Identifiers**

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

## 6.1.5 Data Entry Procedures

### 6.1.5.1 Overview of the Data Entry Process

1. Type in the data you want to enter in each field:

The highlighted area on the screen indicates the maximum length of each field.

When you finish data entry in one field, press the <Down Arrow> key to go to the next field. (The <Return> key will also take you to the next field.)

2. To correct typing errors:

Move the cursor to the point at which you want to make a correction. Remember to use the following keys to move the cursor:

FORWARD to the next FIELD	<Down Arrow> or <Return>
BACKWARD to the previous FIELD	<Up Arrow>
FORWARD to the next WORD	<Control> + <f>
BACKWARD to the previous WORD	<Control> + <a>
FORWARD to the next CHARACTER	<Right Arrow>
BACKWARD to the previous CHARACTER	<Left Arrow>

(See Section 2.2: *GUIDE TO THE KEYBOARD* for more information on how to use various other keys during data entry and correction.)

You can then type over, insert, or delete data.

If you want to cancel the entire record, press Function Key 9 <F9>.

3. When you complete data entry on each screen:

Press <F5>. Data in validated fields is checked automatically.

If errors are found, a flashing message on the screen tells you what is wrong. Make the correction, as described above, and then press <F5> again.

If no errors are found, the next data entry screen is displayed.

4. To correct an error on a previous data entry screen:

Finish data entry on all three screens.

MicroDIS then asks:

*Do you wish to review this citation? <Y>es/<N>o.*

Answer <y>es. The first screen is displayed again, with the data you entered. Correct any errors, and press <F5> to go on to the next screen. If you do not need to make any corrections on a screen, just press <F5>.

When you cycle through the three screens, MicroDIS asks the above question again.

5. To complete the add process:

No data is added to the catalog database until you are ready to add the entire record.

If you do not want to review the record and are ready to add it, answer <n>o to the above question.

MicroDIS now creates the record in the catalog database, and adds each author name, descriptor, major title word, and bibtype code to the appropriate fast access file. Each of these processes is indicated on the screen.

When finished, MicroDIS displays the message:

*Are there more records to enter <Y>es/<N>o?*

To continue in the same module, respond <y>es. To return to the *CATALOG MENU* respond <n>o.

### 6.1.5.2 Data Entry Screen #1

Immediately after you select *ADD* from the *CATALOG MENU*, MicroDIS displays *DATA ENTRY SCREEN #1* (Figure 6.6).

Figure 6.6

```
DOCUMENT CATALOG - DATA ENTRY SCREEN #1
*****
SITE CODE: USAID/WASH      CALL NUMBER: _____
COPIES: 1                  LOCATION(S): _____
FORMAT(S): _____      BIB TYPE: _____

TITLE
_____  
_____  
_____

SECOND TITLE
_____  
_____  
_____

SERIES _____ NUMBER _____

AUTHORS
1. _____
2. _____
3. _____
4. _____
5. _____

<F1> for help, <F2> for authority files, <F5> to continue add, <F9> to EXIT.
```

Type the cataloging data into each field as appropriate, following MicroDIS and local cataloging guidelines (see Section 6.1.4.4) and general data entry procedures (see Section 6.1.5.1).

Note the use of an additional Function Key listed at the bottom of the screen:

*<F2> for authority files*

You can use this key at any time to view the authority files associated with the fields on this screen. For example:

before data entry in a validated field, e.g. to check whether the bibtype code for directories is 05 or 06, or,

after completing data entry for the entire screen, e.g., to check why an error message was displayed beside the author field where you used the acronym =CGAR for the Consultative Group on International Agricultural Research (the authority file shows that the correct entry is =CGIAR).

When you press <F2>, a sub-menu appears at the bottom of the screen:

Figure 6.6a

```
DOCUMENT CATALOG - DATA ENTRY SCREEN #1
*****
SITE CODE: USAID/WASH      CALL NUMBER: _____
COPIES: 1                 LOCATION(S): _____
FORMAT(S): _____     BIB TYPE: _____
TITLE
_____
_____
SECOND TITLE
_____
_____
SERIES
_____
AUTHORS
1. _____
2. _____
3. _____
4. _____
5. _____
<F1> for help, <F2> for authority files, <F5> to
*****
```

```
Which Authority File?
-----
Site Codes
Call # Prefixes
Bib Type Codes
Acronyms
EXIT
-----
```

As on any menu or list of options, type the first letter of the option you want (e.g., b for *Bib Type Codes*). (The authority file display is identical to what you would see in *SYSTEM UTILITIES -- MAINTAIN AUTHORITY FILES*.)

When you finish reviewing the authority file, follow the instruction at the bottom of the authority file screen to press *<F9>* to *EXIT*. You return to Data Entry Screen #1 to resume keying in data for that record.

Figure 6.7 illustrates *DATA ENTRY SCREEN #1* with data added.

Figure 6.7

```
DOCUMENT CATALOG - DATA ENTRY SCREEN #1
=====
SITE CODE: USAID/WASH          CALL NUMBER: T000-88-003
COPIES: 1                     LOCATION(S): DIC-SHELF_
FORMAT(S): P_                 BIB TYPE: 06

TITLE
Directory of U.S. courses in biotechnology for developing countries.

SECOND TITLE

SERIES                                     NUMBER

AUTHORS
1. =BOSTID
2.
3.
4.
5.

<F1> for help, <F2> for authority files, <F5> to continue add, <F9> to EXIT.
```

When finished with data entry on this screen, press <F5>. A flashing error message is displayed beside any of the following fields if:

- (1) the site code is absent or invalid
- (2) the call number is absent or not unique
- (3) the bib type code is invalid
- (4) the series or author fields are entered using the =acronym feature, and the acronym is invalid.

Correct any errors (see Section 6.1.5.1), and then press <F5> to go on to the next screen.

### 6.1.5.3 Data Entry Screen #2

Data Entry Screen #2 appears as in Figure 6.8 without data, and in Figure 6.9 with data added.

Figure 6.8

```
DOCUMENT CATALOG - DATA ENTRY SCREEN #2
=====
PAGINATION: _____ PUB DATE: __/__/__ (YY/MM or DD)
LANGUAGE 1:  _____
          2:  _____
NOTES
_____
_____
_____
_____
_____
_____
Hit <F1> for help, <F5> to continue add, <F9> to EXIT.
```

Figure 6.9

```
DOCUMENT CATALOG - DATA ENTRY SCREEN #2
=====
PAGINATION: 195p. + appendices _____ PUB DATE: DD/__/__ (YY/MM or DD)
LANGUAGE 1:  _____
          2:  _____
NOTES
Published by: National Academy Press, Washington, DC. _____
_____
_____
_____
_____
_____
Hit <F1> for help, <F5> to continue add, <F9> to EXIT.
```

Although the notes field appears on the screen as two highlighted blocks of 250 characters each, data can be entered continuously across the two areas (e.g., in the case that the field is used for a short abstract).

Press <F5> when you have completed data entry on this screen.

A flashing error message will appear on this screen if the pub date is entered incorrectly or omitted.

After this field has been validated and any errors corrected, press <F5> again to display the final data entry screen.

#### 6.1.5.4 Data Entry Screen #3

Data Entry Screen #3 appears as in Figure 6.10 below. Space is provided for entry of up to 20 keywords. Remember that descriptors (selected from a controlled vocabulary such as the *A.I.D. Thesaurus*) can also be entered in the identifier fields, but not vice versa.

Figure 6.10

```
DOCUMENT CATALOG - DATA ENTRY SCREEN #3
-----
DESCRIPTORS
1: _____
2: _____
3: _____
4: _____
5: _____
6: _____
7: _____
8: _____
9: _____
10: _____

IDENTIFIERS
1: _____
2: _____
3: _____
4: _____
5: _____
6: _____
7: _____
8: _____
9: _____
10: _____

Hit <F1> for help, <F2> to add/view keywords, <F5> to start add, <F9> to EXIT.
```

Note the use of Function Key 2 <F2> on this screen. As on Data Entry Screen #1, this key gives you access to an authority file -- the *Subject Keyword Authority File* containing both valid descriptors and identifiers used by your site.

However, on this screen <F2> gives you the option of adding directly to the file, in addition to the option of viewing existing entries. This means that keywords can be added to the authority file dynamically, as you need them.

The process for completing this screen is thus as follows:

1. Enter the descriptors and/or identifiers you want to assign to a record.
2. When finished, press <F5>.
3. If MicroDIS does not find any of the descriptor(s) and/or identifier(s) in the *Subject Keyword Authority File*, a flashing message beside the relevant term alerts you that either you have used a correct term but typed/spelled it incorrectly, or you have used a new term which does not appear in the file.

4. Press Function Key 2 <F2>. If you think you made a mistake in entry, you can view the file to check the spelling or wording. Or, you can update the file by adding a new descriptor or identifier. (See details below on these processes.)
5. Press <F5> again when you finish making corrections or adding new keywords.
6. When all descriptors/identifiers are validated, MicroDIS gives you the option of reviewing the entire record (the data on all three screens) before finally adding it to the database.

Details of steps 3 and 4 are as follows.

If any new or incorrectly entered keywords appear on Data Entry Screen #3, a flashing message will appear beside each relevant term as in the example below.

Figure 6.11

```

DOCUMENT CATALOG - DATA ENTRY SCREEN #3
=====
DESCRIPTORS
1: BIOTECHNOLOGY _____ NEW KEYWORD OR SPELLING ERROR
2: COURSES _____
3: _____
4: _____
5: _____
6: _____
7: _____
8: _____
9: _____
10: _____

IDENTIFIERS
1: NATIONAL ACADEMY OF SCIENCES _____ NEW KEYWORD OR SPELLING ERROR
2: _____
3: _____
4: _____
5: _____
6: _____
7: _____
8: _____
9: _____
10: _____

Hit <F1> for help, <F2> to add/view keywords, <F5> to start add, <F9> to EXIT.

```

When you press <F2> a message a sub-menu appears at the bottom of the screen, providing options as follows:

Figure 6.11a

```

DOCUMENT CATALOG - DATA ENTRY SCREEN #3
-----
DESCRIPTORS
1: BIOTECHNOLOGY _____ NEW KEYWORD OR SPELLING ERROR
2: COURSES _____
3: _____
4: _____
5: _____
6: _____
7: _____
8: _____
9: _____
10: _____

IDENTIFIERS
1: NATIONAL ACADEMY OF SCIENCES _____ NEW KEY
2: _____
3: _____
4: _____
5: _____
6: _____
7: _____
8: _____
9: _____
10: _____

SUBJECT KEYWORDS
-----
Add
View
EXIT
-----

Hit <F1> for help, <F2> to add/view keywords, <F5> to start add, <F9> to EXIT.
    
```

**If you select VIEW:**

You have the option of seeing the entire file listed in alphabetical order, or specifying which part of the alphabetical listing you want to see. MicroDIS thus asks:

*Do you want the <E>ntire file displayed, or do you want a <R>ight truncated search:*

Respond with <e>ntire if you want to view the file from the beginning (you will be given an option to exit after every 15 keywords displayed). Numerical entries (e.g., A.I.D. project numbers used as identifiers) are displayed first, then keywords beginning with the letter a, and so forth.

Respond with <r>ight truncated to indicate what specific character or characters you want the display to begin with, e.g., the letter b, or the letters bio. Enter these letters or characters at the next prompt:

*Enter value:*

Regardless whether you want to begin the display at the beginning of the file, or at some specific point in the file, the next message asks:

*Do you wish <A>ll terms displayed, or just <D>escriptors or <I>dentifiers?*

Finally, you have the option of viewing the list on the screen, or printing it out. The next message thus asks:

*Report to <S>creen or to <P>rinter?*

When you are finished reviewing the authority file, follow the instruction at the bottom of the screen to press <F9> to EXIT. You will return to Data Entry Screen #3 to retype or correct keywords.

If the error on the screen was a spelling error (e.g., BIOTECHNOLOGY), make the correction by typing over the erroneous entry and press <F5> again. Proceed as follows to add any new keywords.

If you select ADD:

The screen is redisplayed with a new panel to the right. Within the panel, the first invalid keyword is highlighted and you are asked if you want to add the term to the *Subject Keyword Authority File*.

Figure 6.12

```
DOCUMENT CATALOG - DATA ENTRY SCREEN #3
=====
DESCRIPTORS
1: BIOTECHNOLOGY
2: COURSES
3:
4:
5:
6:
7:
8:
9:
10:

IDENTIFIERS
1: NATIONAL ACADEMY OF SCIENCES
2:
3:
4:
5:
6:
7:
8:
9:
10:

NATIONAL ACADEMY OF SCIENCES
Identifiers must be on the
Keyword Authority File. Do
you want to add this term?

<Y>es or <N>o

Hit <F1> for help, <F2> to add/view keywords, <F5> to start add, <F9> to EXIT.
```

A similar message would appear if the term were a descriptor. To add the term, respond <y>es. MicroDIS then displays the message:

*Adding term*  
*Hit <Spacebar> to continue list*

If at the last minute you decide not to add a term, respond <n>o. You must then delete that term from the screen.

MicroDIS repeats the same process for any other terms not found on the authority file.

When finished, press <F5> to revalidate the screen and to complete the data entry process.

### 6.1.5.5 Completing the Data Entry Process

When all three screens are completed, you have the option of reviewing them before adding the entire record to the database. If you do not review the record, the following messages appear on the screen to tell you that the record is being created and the fast access files are being updated:

*creating DOCUMENT record .... (call # appears here)*

*Building fast access entries for AUTHOR fields*

*Building fast access entries for DESCRIPTOR/IDENTIFIER fields*

*Building fast access entries for TITLE words*

*Building fast access entries for BIBTYPES*

*Building ANCILLARY data file (refers to the notes field, if used)*

When this process is completed, you can continue on to add another catalog record by responding <y>es to the following question, or you can automatically exit out of the *ADD* function back to the *CATALOG MENU* by responding <n>o:

*Are there more records to enter <Y>es/<N>o?*

### 6.1.6 What Next... After ADD

In the normal course of processing, once one or more records are added to the catalog database you may want to edit your entries. This can be accomplished by using any of several alternatives in the *DOCUMENT CATALOG* module :

1. go directly into the *MODIFY* function and check each record (see Section 6.2), or
2. go to the *REPORTS* function and print out a paper copy Proof Sheet Report (see Section 6.5).

Selecting the second alternative results in a two-step process of first printing or displaying the new records, and then modifying them.

Once a record is entered, whether edited or not, it is immediately available for retrieval, display and/or printing using the *SEARCH* function.

If the item is ready to be checked out, the catalog database record is also available for verification as part of the *CIRCULATION* module check-out procedure.

## 6.2 MODIFYING A CATALOG RECORD

Once a record has been entered in the catalog database, you may want to add or change data in some fields, or correct typographical errors.

By using the *MODIFY* function, you can change the data in any field except the site code and call number fields. If a change must be made in either or both of these fields (e.g., in the instance of copy cataloging from an imported record), use the *CATALOG UTILITIES* and select the *CHANGE* option.

Note that changes can only be made to one record at a time, i.e., you cannot globally modify a common error in several records.

### 6.2.1 Selecting a Record to Modify

To modify a record you must first know its site code/call number. When in doubt, *SEARCH* for the record by author or title. In the display you will be able to see the identifying code/number.

The first message in *MODIFY* then asks:

*Enter the SITE CODE and CALL NUMBER of the record  
to be modified.*

*site code:  
call number:*

*Press <F9> to EXIT ...*

The local site code is automatically displayed. (If you want to modify an imported record bearing another site code, type over the site code displayed. Enter the call number and press <Return>. If the document identified is not found on the database, MicroDIS displays the following message:

*Record does not exist for this site code/call no.  
Hit <Spacebar> to continue*

The document identification message is then redisplayed so that you can re-enter the site code/call number.

When you enter a valid call number, *DATA UPDATE SCREEN #1* is displayed and awaits your entry of the modifications. The sample screens below (Figures 6.13 through 6.15) include data for illustrative purposes.

## 6.2.2 Data Update Screen #1

Figure 6.13

```
DOCUMENT CATALOG - MODIFICATION SCREEN #1
=====
SITE CODE: USAID/WASH          CALL NUMBER: T000-88-001
COPIES: 1                     LOCATION(S): DIC-SHELF_
FORMAT(S): P_                 BIB TYPE: 06

TITLE
Directory of U.S. courses in biotechnology for developing countries.

SECOND TITLE

SERIES                                     NUMBER

AUTHORS
1. Board on Science and Technology for International Development
2.
3.
4.
5.
Hit <F1> for help, <F2> for authority files, <F3> to continue modify,
<F9> to EXIT.
```

If the changes that you want to make are on screen #2 or screen #3, press <F5> to go on to those screens.

To change or add data, move the cursor to the appropriate field and type in the new data, or type over the previously entered data. You do not need to type/retype any other data on the screen except that which you wish to change.

For example, on the above screen, you might want to correct the bibtype code if it had been incorrectly assigned during cataloging. Or, you may have received an additional copy, and now want to enter "2" in the copy field and change the location field to note two different locations (e.g., DIC/TR).

After you have completed modifications on this screen, press <F5>. The data on the screen is re-validated as in the *ADD* process. If any error messages appear, make the corrections and press <F5> again.

If no errors are found, *DATA UPDATE SCREEN #2* is immediately displayed (see Figure 6.14).

### 6.2.3 Data Update Screen #2

Figure 6.14

```
DOCUMENT CATALOG - MODIFICATION SCREEN #2
=====
PAGINATION: 195p. + appendices _____ PUB DATE: MD/___ (YY/MM or MD)
LANGUAGE 1:  _
           2:  _
NOTES
Published by: National Academy Press, Washington, DC. _____
_____
_____
_____
_____
Hit <F1> for help, <F5> to continue modify, <F9> to EXIT.
```

Again, if the data that you want to change/add is not on this screen, press <F5> to go on to update screen #3.

To change or add data, move the cursor to the appropriate field and type in the new data, or type over the previously entered data. You do not need to type/retype any other data on the screen except that which you wish to change.

For example, since originally entering the record, you may have found the date of the publication. Or, you may want to add additional notes about publication availability.

After you have completed modifications on this screen, press <F5>. The data on the screen is re-validated as in the *ADD* process. If any error messages appear, make the corrections and press <F5> again.

Before *DATA UPDATE SCREEN #3* (Figure 6.15) is displayed, a brief message appears on the screen:

*Retrieving descriptors/identifiers, please be patient.*

## 6.2.4 Data Update Screen #3

Figure 6.15

```
DOCUMENT CATALOG - MODIFICATION SCREEN #3
*****
DESCRIPTORS
1: BIOTECHNOLOGY _____
2: COURSES _____
3: _____
4: _____
5: _____
6: _____
7: _____
8: _____
9: _____
10: _____

IDENTIFIERS
1: NATIONAL ACADEMY OF SCIENCES _____
2: _____
3: _____
4: _____
5: _____
6: _____
7: _____
8: _____
9: _____
10: _____

Hit <F1> for help, <F2> to add/view keywords, <F5> to start modify,
<F9> to EXIT.
```

Again, if the data that you want to change/add is not on this screen, press <F5>. As this is the final update screen, by pressing <F5> you complete the modification process.

If you want to change or add data on this screen, move the cursor to the appropriate field and type in the new data, or type over the previously entered data. You do not need to type/retype any other data on the screen except that which you wish to change.

For example, since originally entering the record, you may have found that you want to add a new descriptor or identifier. If the new keyword appears in the *Subject Keyword Authority File*, simply type in the new term(s) and press <F5> to validate the screen and complete the modification process.

If you want to add a keyword, type in the term and press <F5>, then follow the same entry and validation procedures described for the *ADD* process (see Section 6.1.6 above).

### 6.2.5 Completing the Modify Process

When all modifications are complete, the entire record is recorded in the database, replacing the record as originally entered. The following message appears on the screen:

*Updating DOCUMENT record*

Any of the fast access files affected by the changes are also updated at this time. Screen messages let you know if any such changes are made.

Upon completion of this process, MicroDIS asks you the following question:

*Are there more records to modify (Y/N)?*

If you respond <y>es, MicroDIS redisplay the message asking for the site code/call number of the record to be modified, and the entire process as described above is repeated.

If you respond <n>o, you return to the *CATALOG MENU*, from which you can select other functions in this module or exit.

### 6.2.6 What Next... After MODIFY

If you wish to edit the modified records, you can go to *REPORT* and print out a paper copy *Proof Sheet Report* (see Section 6.5). Note that you will also print any other records added to the database since you last ran this report.

If you need to modify the site code/call number of any records, go to *CATALOG UTILITIES* and use the *CHANGE* function.

As with new records added, modified records are immediately available for retrieval, display and/or printing using *SEARCH*.

The modified data will also appear in the partial record displayed during the *CIRCULATION* check out procedure.

### 6.3 DELETING A CATALOG RECORD

Removal of a record from the catalog database and from associated fast access files is completed using the *DELETE* function.

To delete a record, you need to know its site code/call number. If you do not have this number at hand, first use *SEARCH* to find the record by author or title, and then display it.

#### 6.3.1 Selecting a Record for Deletion

When you select *DELETE*, MicroDIS displays the following document identification message:

*Enter the SITE CODE and CALL NUMBER of the record  
to be deleted*

*site code:  
call number:*

*Press <F9> to EXIT*

The local site code is automatically displayed. Type in the call number and then press <Return>.

If the document identified is not found in the database, MicroDIS displays the following message:

*Record does not exist for this site code/call number  
hit <Spacebar> to continue*

The document identification message is then redisplayed so that you can correct any typographical errors and re-enter the number, or enter another number.

### 6.3.2 Confirming the Record for Deletion

As soon as a valid call number is supplied, MicroDIS retrieves and displays the data in several key fields of the record, as illustrated in Figure 6.16.

Figure 6.16

The document is:	
SITE CODE: _____	CALL NUMBER: _____
AUTHOR 1: _____	
TITLE : _____	
_____	
_____	
COPIES: _____	LOCATION: _____
PUB DATE: _/ _	PAGINATION: _____
Do you want to delete this document? <Y>es/<N>o =====	

Review the partial record to make sure that this is the record that you want to delete. Type in your response to the message at the bottom of the screen:

- (1) If you respond <n>o, the following message is displayed:

*Document will not be deleted  
Hit <Spacebar> to return to previous screen*

The site code/call number message is displayed again so that you can either enter another number or exit.

- (2) If you respond <y>es to the question at the bottom of the screen, the following message appears:

*Are you certain? <Y>es/<N>o  
A <Y>es response will remove the record!*

The screen then alerts you to the process of erasure as follows:

*Erasing document # (the call number appears here)  
Erasing authors from fast access files  
Erasing descriptors/identifiers from fast access files  
Erasing title keywords from fast access files  
Erasing bibtypes from fast access files  
Document has been removed from catalog.  
Hit <Spacebar> to return to previous screen*

### 6.3.3 What Next... After DELETE

When a record is deleted from the catalog database, all references to that record are also deleted from the relevant fast access files (indexes). However, the main entry in the fast access file is not deleted (an author's name, major title words, the bibtype code, descriptors/identifiers). For example, if the descriptor "courses" was only assigned to one record in the database, and that record is deleted, the *Subject Keyword Fast Access File* would show an entry as follows:

<i>Hits</i>	<i>Fast access key</i>
0	COURSES

To completely remove such "empty entries" in the fast access files -- entries for which there are no longer any "hits" -- you may periodically want to use the *CATALOG UTILITIES -- VERIFY FAST ACCESS FILE INTEGRITY*.

The best time to delete these "empty entries" in the fast access files is prior to running *New Acquisitions Reports*, or entire database reports. There is no reason or need to delete them otherwise. (See the section on *CATALOG UTILITIES* for further information on this process.)

## **6.4 SEARCHING THE CATALOG**

The primary purpose of creating and maintaining a catalog is to assist staff and users in determining whether certain materials are available in an information center, and if so where to find them.

This sub-section describes the process involved in using *MicroDIS SEARCH* to locate materials in a MicroDIS catalog, focusing on both similarities to paper-based card catalog search procedures and distinctive MicroDIS features.

### **6.4.1 Using a Catalog to Find Documents -- Overview**

The process of using a catalog to find documents involves a combination of logical thinking and use of certain search tools and techniques.

In this process, a user has a mental idea or description of what he or she wants. Similarly, catalog records (on cards, lists, or in a database) contain descriptions of each document in a collection. The objective is to be able to identify and retrieve all user descriptions and document descriptions that match.

Catalogs are organized to facilitate this process by making it possible to find potentially relevant documents based on a match of only one aspect of the catalog description. Card catalogs, for example, are physically arranged by author name, by first major title word, by subject, or by all three. Online catalog databases also provide options to search by these three criteria, and usually by several other criteria as well (e.g., publication date, any title word, publisher, etc.).

Once a record or set of potentially relevant records is identified, the user must review the entire document description (author, title, publication date, edition, etc.) to determine if it is exactly what he/she wants.

One drawback to this process is that often people don't think in the same way that catalog descriptions are written. The result is that documents may be available, but the user does not find them in the catalog because they are not described in the way in which the user expects to find them. It is therefore important that anyone searching a catalog be able to think through the alternative ways in which a name, word, or subject may be entered or spelled in the catalog.

For example, a user may look for a report by the author Haven North, but in the catalog the name is recorded as North, W. Haven. Or, a user may try to find materials on "private enterprise", but the subject keyword used in the catalog for materials on that subject is "private sector". In such cases, the user might walk away thinking that no documents are available which match his/her interests, when in fact there are.

Catalogs are therefore usually supported by some additional quick reference tools and techniques to help overcome some of these potential difficulties. Lists of authorized spellings and standardized subject headings (*authority files*) are commonly provided. Computer-based catalogs also often provide lists of every author name, title word and subject keyword which actually appears in the catalog (*indexes* or *fast access files*). Searching by a partial word/name is also possible. Such tools and techniques used in *MICRODIS SEARCH* are discussed later in this section.

In addition to the potential for not finding documents which are relevant to a user's interest, it is also possible to identify many records which are not relevant. Since the user must look at each record to determine which documents he/she wants to locate, it is important to minimize the number of totally irrelevant records retrieved in a search (in computer-based searching, these irrelevant records are commonly called false hits).

When using paper-based card catalogs, where users can only search by one criteria at a time (author, title or subject), it is difficult to overcome this problem. With computer-based catalog searching, however, it is possible to gain more control over how many or how few records are retrieved by searching on multiple criteria at the same time.

For example, in computer-based catalog searching, a user can specifically look for documents on agricultural finance in Kenya written since 1984. The computer does the work of finding only those records in the catalog which match all three criteria.

The process of combining several criteria in one search makes use of a technique generally referred to as Boolean searching. In *MICRODIS*, the two commands that are used in this process -- AND and OR -- are referred to as connectors. This process is also discussed in greater detail later in this section.

#### 6.4.2 Searching for Catalog Records

To search for catalog records, you enter a search request in the highlighted areas of the *MICRODIS SEARCH SCREEN*.

To access this screen, first select *SEARCH* from the *CATALOG MENU*. A message appears as follows:

```
MICRODIS -- Search  
Do you want search help <Y>es/<N>o?
```

If you would like to read a summary of the procedures and options described in this section, respond <y>es. This message is several screens in length. You can go forward through the screens, as well as backward to review a previous screen.

If you respond <n>0, MicroDIS goes directly to the *SEARCH SCREEN* (Figure 6.17).

Figure 6.17

```
MicroDIS -- Search Screen
=====
CON: connector      A (and) or 0 (or)
TYPE: field type   1 - subject keyword      2 - title word
                  3 - author                4 - bibtype code      5 - site code/call number
VALUE: the term to search for (use = for right truncation)
       author acronyms may be used here
=====
CON  TYPE  VALUE
-   -   -----
-   -   -----
-   -   -----
-   -   -----
-   -   -----
A  pubdate <=> _ _ / _ _ (yy/mm)
Hit <F1> for help          <F5> to start search
   <F2> to view fast access files    <F9> to EXIT
```

The information in the box at the top of the screen provides a brief summary of how to use each of the highlighted areas at the bottom of the screen. The blank lines in Figure 6.13 correspond to the highlighted area on the screen. At the bottom of the screen is a line indicating how to use certain Function Keys (<F1>, <F2>, <F5> or <F9>) during the search process.

You type a search request into the highlighted area, moving from left to right across the screen.

It is not important whether you type in upper or lower case; MicroDIS displays it in upper case.

Each completed line expresses one search statement (a line of information specifying what you are looking for).

There is enough space on one screen to enter and connect up to five search statements (with the option of continuing on additional screens). If your search includes more than one search statement, you can think of the sum total as a search strategy. Note that if you enter more than one search statement, but do not connect it to the next, MicroDIS nevertheless assumes a connection (see Section 6.4.2.3 below).

The features of the screen are best understood in the process of using it. The following section describes the steps involved in completing a simple search (one statement).

### 6.4.2.1 Completing a Simple Search

For a simple search, you only need to enter one search statement (line). Use a simple search, for example, to find all materials by one author.

#### STEP 1:

Take a minute to think about what you want to find. It may save some time and help to avoid finding inappropriate references.

Remember that what you are looking for may not be entered in the database record in the same way as you think it will be. This is especially true of author names and subject keywords (descriptors/identifiers). For example, you may be looking for documents by Carl Eicher, but the author's name is in one record as Eicher, Carl and in another record as Eicher, C.

There are several ways of making sure that MicroDIS is able to match your interests against what is in the database records.

- (a) Make sure that you follow whatever format is specified for the information in each field (see Step 4 below).
- (b) Truncate a name or word if you are uncertain about how it is entered, typing the characters or numbers you are certain of, following by an equal sign (=), e.g., Eicher=.
- (c) Press <F2> to do a preliminary check of what names/title words/descriptors/identifiers/bibtype codes appear in one or more records in the database, and how they appear. Use of the fast access files for this purpose is described in more detail in Section 6.4.2.2.

#### STEP 2:

**CON.** A connector links one search statement to another. When beginning a search you do not need to enter a connector as there is no previous statement to connect with; in this case, press the <Down Arrow> or <Return> to skip to the next highlighted area.

#### STEP 3:

**TYPE.** Type refers to the type of information you are looking for, or in other words, the field(s) you want to search in. Enter one of the codes in the box at the top of the screen. Note that for TYPES 1-4, you are actually searching the fast access file associated with those fields:

- 1 Subject Keywords (descriptors and identifiers)
- 2 Title, Second Title or Serial Title
- 3 Author
- 4 Bibliographic Type
- 5 Site Code and Call Number

These are the only fields you can search. If you do not enter a number, MicroDIS assumes Type 1 (Subject Keyword). After you enter TYPE, the blinking cursor moves to the next highlighted area.

**STEP 4:**

**VALUE.** Value refers to the specific information you are searching for of the type you indicated above. Note the format for entering information of each type as follows:

- o **Subject Keyword --** type in a descriptor (controlled term) or identifier (non-controlled). Project and/or contract numbers may also be entered if used by your site as identifiers.
- o **Title word --** enter any SINGLE major word in a title. Do not enter an entire title, two or more title words, or a number.
- o **Author --** follow either of the following formats to ensure that you find everything by a specified author:  
  
last name, first initial=  
last name=  
  
o **Bibtype --** enter one of the bibliographic type codes in use by your site to find a specific type of document, e.g., annual reports, evaluations, design papers, etc. This field of search is usually only searched in connection with another search statement (e.g., to narrow documents found to one bibtype category).
- o **Site code/Call number --** enter in one of the following formats:
  - (a) **For local site codes:**  
  
=call number (where preceding = stands for the site code)  
  
or  
  
=call number prefix= (where ending = stands for all call numbers with that prefix, e.g., =AGR=)
  - (b) **For imported records bearing other site codes:**  
  
site code call number  
  
or  
  
site code call number prefix=

48

**Note:** if the site code is less than 10 characters, enter site code plus enough blank spaces to equal 10 characters -- call number begins at 11th position -- there is no punctuation between the site code and call number.

**STEP 5:**

Check what you have entered and make any changes or corrections.

**STEP 6:**

Press <F5> to tell MicroDIS to begin searching for the specified information. A message is briefly displayed at the bottom of the screen:

*Search is underway...*

This message is then replaced by one saying:

*Searching for ... followed by the VALUE*

The number of records found for that VALUE is temporarily displayed under this message.

When finished, the number of records found is displayed at the right of the screen under the headings *Found* and *Total*. In a simple search, the number FOUND and the TOTAL will be identical.

**STEP 7:**

A new message is displayed at the bottom of the completed search screen as follows:

*View the documents Continue search Start a new search EXIT*

As in other MicroDIS menus and lists of options, press the first letter of the option you select. (Or press the <Right/Left Arrow> keys to highlight the desired option and then press <Return>.)

**VIEW.** To display a short citation (title and call number) of the records found, select <v>iew. After displaying as many short citations as will fit on the screen, MicroDIS then displays another set of choices:

*Forward Backup Print New view Mark for print EXIT*

See Section 6.4.3 for details on each of these options.

**CONTINUE.** To connect the search statement you just entered to another, new search statement, select <c>ontinue. The search screen is redisplayed, including a line showing how many records you have already found. This procedure is discussed in Section 6.4.2.3 below.

**START.** To enter another search statement without connecting it to the search statement you just entered, select <s>tart. The search screen is redisplayed.

**EXIT.** To exit back to the *CATALOG MENU*, select <e>xit.

**Note:** If you forget to fill in a **TYPE** before pressing <F5> to start a search, MicroDIS assumes that you want to look for a subject keyword (TYPE 1). If you forget to add a **VALUE** before pressing <F5>, it begins a search, finds nothing, and then prompts you to view/ continue/start/or exit.

The **SEARCH SCREEN** appears as follows when you have completed a simple search (Figure 6.18):

Figure 6.18

```

=====
MicroDIS -- Search Screen
=====
CON: connector      A (and) or O (or)
TYPE: field type   1 - subject keyword      2 - title word
                  3 - author              4 - bibtype code      5 - site code/call number
VALUE: the term to search for (use = for right truncation)
       author acronyms may be used here
=====
CON  TYPE  VALUE                                     Found  Total
-    -    -                                     -      -
-    3    MANJI, A=_____                   1      1
-    -    _____
-    -    _____
-    -    _____
-    -    _____
A  pubdate <=> _ _ / _
=====
| View the documents | Continue search | Start a new search | EXIT search |
=====

```

#### 6.4.2.2 Previewing the Contents of Searchable Fields

In order to avoid fruitlessly searching the database for author names, title words, subject keywords or bibliographic type codes that do not appear in any record in the catalog database, or, to check spelling and form of entry before entering a **VALUE**, you have the option of browsing MicroDIS' fast access files.

Fast access files contain each author name, title word, bibliographic type code and subject keyword that appears in the catalog, with internal pointers from each entry in the file to the record in which it appears. The purpose of creating these files is to make it faster for MicroDIS to find records in the database, much as you would use the index of a book to quickly locate specific information in the text.

However, these fast access files are also available to you as a tool for "previewing" the contents of the searchable fields.

The file also indicates how often a word, name or number is used, but you cannot retrieve a record through the fast access file. Just check the files to see what names/words/codes/keywords appear in the catalog and how they are spelled or entered. Then return to the *SEARCH SCREEN* to enter the information as a *VALUE*.

Note also that you cannot partially enter a search statement, then go to a fast access file, and then return to the partially completed screen. What you had typed in will be erased and a new screen displayed. If you want to look at a fast access file, it is best to do it before you type anything.

To look at one or more fast access files, you must have a *SEARCH SCREEN* displayed in front of you. Then press <F2>. The *SEARCH SCREEN* is temporarily replaced by the following menu (Figure 6.19).

Figure 6.19

```

=====
MicroDIS -- SEARCH Screen
=====
CON: connector      A (and) or O (or)
TYPE: field type   1 - subject keyword      2 - title word
                  3 - author                4 - bibtype code      5 - site code/call number
VALUE: the term to search for (use = for right truncation)
       author acronyms may be used here
=====
CON  TYPE  VALUE
-----
-    -    _____
-    -    _____
-    -    _____
-    -    _____
A   pubdate <=> _ _ / _
Hit <F1> for help,
    <F2> to view fast access files,
=====
Which Fast Access File?
-----
Subject Keywords
Title Words
Authors
Bibtype Codes
EXIT
=====

```

To view a fast access file, enter the first letter of the desired option. Note that some files include the contents of more than one field:

- 1 Subject Keywords -- includes descriptors, identifiers
- 2 Title Words -- includes second title, serial title words (no numbers)
- 3 Authors
- 4 Bibtype codes

A new message is displayed on the screen, indicating the name of the file you have chosen and the following question:

*Do you want the <E>ntire file displayed or  
only <P>art of the file displayed:*

The contents of the files are displayed in alphabetical (or numerical) order.

Therefore, if you select <e>ntire, the display begins with "a...." or "01...".

If you select <p>art, you elect to display only a specific part of the file. In this case, MicroDIS then asks you to:

*Enter the letters/numbers you want to start with:*

Type one or more letters or numbers to indicate what part of the file you want to look at (e.g., a single letter to view all the terms beginning with that letter, or several letters to display only the terms beginning with those letters). For example, to look at the subject keywords containing the same root (e.g., agricultural economics, agricultural extension, agriculture, etc.), you could type in "agric".

Next MicroDIS displays the question:

*Repor: to <S>creen or to <P>rinter*

If you select <s>creen, the contents of the file are displayed on the screen, filling one screen at a time. At the bottom of each screen you have the option to:

*Hit <Spacebar> to continue or <F9> to EXIT*

If you select the <p>rinter, you are asked to align the printer paper (i.e., so that printing begins at the top of the page) and then to continue. The file is then printed in full or in part, as you requested.

Regardless of the file you select, each display includes two columns of information.

The first column indicates how many times the term has been used in the database, and the second identifies the specific name, word, subject keyword or bibliographic type code.

When finished viewing fast access files, exit back to the *SEARCH SCREEN*.

### 6.4.2.3 Using the Connector

In MicroDIS, it is possible indicate how general or specific your information needs are. In a broad search of the database, for example, someone may want to know about everything available about or by:

*subject A or subject B or subject C ... or,*

*author A or author B*

In a specific or narrow search, someone may want to find documents on:

*subject A, but only if it concerns country B? ... or,*

*subject A, but only if published since 1984?*

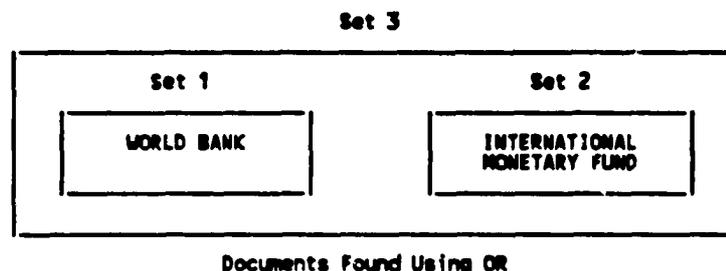
Even more specifically, a user may ask for:

*documents on subject A or subject B, only if they are evaluations  
and published in the last two years*

MicroDIS' computer-based searching is well suited to finding out if any materials in an information center's collection meet these needs. The technique used is referred to by various names, but in MicroDIS it can be simply thought of as *connecting* two or more search statements. The connection is made by typing either A or O in the connector (CON) area of the *SEARCH SCREEN*.

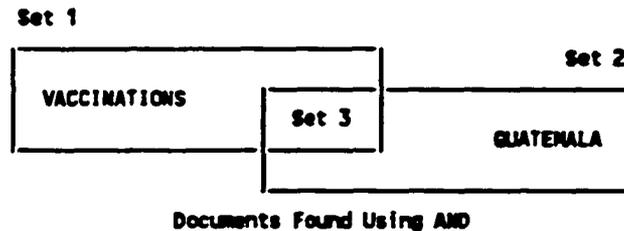
O -- OR instructs MicroDIS to search for all records containing any of the values that you are searching for. OR is thus useful in broadening a searches to find as many records as possible related to your area of interest.

For example, in searching for all documents authored by the World Bank or International Monetary Fund, MicroDIS would find the set of documents authored by the World Bank (Set 1), and then find the set authored by the International Monetary Fund (Set 2). Finally, it adds the two sets together to give you the total number of all records appearing in EITHER previous set (Set 3, excluding duplicates). This can be represented graphically as follows:



A -- **AND** instructs MicroDIS to find only those records containing ALL specified values that you are searching for. **AND** is thus useful in narrowing a searches to find just those records that match all search criteria.

For example, in searching for documents on the subject of vaccination programs in Guatemala, MicroDIS would first find the set of documents concerning vaccinations (Set 1), and then find a second set on Guatemala (Set 2). Finally, it compares the contents of the two sets; the total number of records found (Set 3) includes only those records which appear in BOTH previous sets. This can be represented graphically as follows:



If useful, **AND** and **OR** can be combined in the same search, but it is important to be clear about the order in which you want MicroDIS to search the specified fields, e.g.,

*subject: project 518005 OR subject: project 518010 AND:  
bibliographic type: 17 AND publication date: since 1984*

MicroDIS performs a search in the order in which it is specified, and applies the **AND** or **OR** to the last set of **TOTAL** records found. Therefore, if the above search were typed in a different order, a quite different (and inappropriate) set of records could be found.

To enter any one of these search strategies in the **SEARCH SCREEN**, remember **NOT** to enter a connector on the first line of your search (as you are not connecting that statement to anything).

When you have completed entering the search strategy, press <F5> to signal MicroDIS to start the search. MicroDIS follows the same process as described for a simple search, but with one difference. The number **FOUND** is the number of records containing only the single value specified in each line. The **TOTAL** is the number of records which contain either or both values, as linked by your connector.

A completed screen would look like the one below (Figure 6.20).

Figure 6.20

```

=====
MicroDIS -- SEARCH Screen
=====
CON: connector      A (and) or O (or)
TYPE: field type   1 - subject keyword      2 - title word
                 3 - author                4 - bibtype code      5 - site code/call number
VALUE: the term to search for (use = for right truncation)
       author acronyms may be used here
=====
CON  TYPE  VALUE                                Found  Total
-----
O    3     WORLD BANK                            10     10
A    3     INTERNATIONAL MONETARY FUND          15     25
A    1     AGRICULTURAL CREDIT                   50     10
-----
A    pubdate >= - - / -
=====
| View the documents | Continue search | Start a new search | EXIT search |
=====

```

### CONTINUING A SEARCH:

If you want to modify your last search statement or search strategy by connecting it with a new statement, you can elect to <c>ontinue the search. When you select this option, MicroDIS redisplay the *SEARCH SCREEN*, but now shows the number of records found in the previous search.

Since you want to connect the first statement on this screen with the set of records previously found, begin this screen with a connector. Then proceed as for any search screen.

For example, if you searched for all evaluations (bibtype) concerned with any aspect of agriculture (subject keyword), you may have retrieved more records than you care to examine (e.g., 200). You could then elect to <c>ontinue the search to limit the documents found to only those published since 1984 (pubdate). The new statement entered would appear as: *A pubdate > 84*.

Or, you may search on infant mortality (subject keyword), but only find one or two records. You could then elect to <c>ontinue the search to also look for documents on child mortality (subject keyword). The new search statement would appear as: *O 1 child mortality*.

If, by continuing a search, the new total found is 0, MicroDIS provides an additional option at the bottom of the screen to:

*Backup to previous results*

If you <b>ackup, the *SEARCH SCREEN* is redisplayed with the previous (non-zero) total found. You can then continue on to modify that set, or, by pressing <F5> without entering any additional search statements, display that set of records found.

## NARROWING A SEARCH BY DATE OF PUBLICATION:

Near the bottom of the *SEARCH SCREEN* is a separate line to use if you want to limit the documents found to only those published before a specified date, on a specified date, or after a specified date.

The only connector that you can use with pubdate is *AND*, and hence the connector area is already filled in with an *A*.

In the next highlighted space, enter the symbol for the date range that you want: *<* for any date before, *=* for any date the same as, and *>* for any date after the one you specify.

In the last highlighted space, enter the year and month, if relevant, of the publication date as two-digit numbers. For example:

to find documents published after 1984, enter:	<i>&gt; 84/</i>
to find documents published before 1984, enter:	<i>&lt; 84/</i>
to find documents published during 1984, enter:	<i>= 84/</i>
to find a document published in January 1984, enter:	<i>= 84/01</i>

### 6.4.2.4 Other Search Techniques

#### USING A TRUNCATION OR "WILDCARD" SYMBOL (=):

One technique that can be used is referred to as word or number right truncation. This technique is useful for general, broad types of searches, or in cases where you don't know how an entire name or word is spelled.

Any time that you want to specify that you are looking for any names, words or numbers that begin with the same characters or numerals, you can truncate the word or number as follows:

- (1) type as much of the word or number as you like (e.g., irrig)
- (2) followed immediately by an equal sign (e.g., irrig=)

MicroDIS then finds every name, word or number which begins with the specified characters, but has any possible ending (e.g., irrigated farming, irrigation, irrigation equipment, irrigation system construction, etc.).

As another example, there may be several subject keywords relevant to trade (e.g., trade quotas, trade agreements, trade regulation). To find all documents on all topics beginning with trade, type in trade=.

Note that you need to include as many characters as necessary to distinguish what you are looking for from other words which may have a similar beginning. To use the above example, if you only type in trad=, you may also find documents dealing with subjects such as "traditional farming" or "traditional healers."

Another use of this technique is in searching by author name (e.g., if uncertain how to spell "Rondinelli", you could enter "Ron=").

#### SEARCHING WITH AN AUTHOR ACRONYM:

To search by an institutional author or sponsor (e.g., search by TYPE 3/AUTHOR for documents sponsored by the International Monetary Fund), it is possible that you may not need to type in an entire, lengthy name.

When specifying the name, first type an equal sign (=), then the acronym for the institutional author. Provided that MicroDIS can recognize the acronym (by checking the *Author/Series Acronym Authority File*), it will go ahead and search for all documents by the full name of the institutional author.

For example, to find all documents authored/sponsored by the Consultative Group on International Agricultural Research (CGIAR), type:

**=CGIAR**

If this does not work, the acronym may not be used by your site (i.e., it is not in the authority file); try typing in the full name of the institution.

#### 6.4.2.5 Some Common Search Statements and Strategies

Although it is theoretically possible to individually search every field, or to combine a search of one field with any other field, only certain searches really make sense or are likely to be needed.

The following list includes some of the most common search statements and strategies that are likely to be used.

1. To find all items by a specific author

**AUTHOR**

2. To find all items by a specific author, published since a specific date

**AUTHOR (AND) PUBDATE**

3. To find one item by a specific title

**TITLE word (AND) TITLE word ... etc.**

4. To find all items in a specific series

TITLE word (AND) TITLE word ... etc.

5. To find as many items as possible on a subject or geographic area

SUBJECT KEYWORD

SUBJECT KEYWORD (OR) SUBJECT KEYWORD ... etc.

CALL NUMBER (prefix=)

TITLE word (OR) TITLE word ... etc.

any combination of the above, connected by OR

truncate a subject keyword

6. To find limit items found on a specific subject

SUBJECT KEYWORD (AND) SUBJECT KEYWORD ... etc.

SUBJECT KEYWORD (AND) PUBDATE

SUBJECT KEYWORD (AND) AUTHOR (sponsoring agency)

SUBJECT KEYWORD (AND) BIBTYPE CODE

any combination of the above, connected by AND

7. To find all items on a subject, concerning a country or geographic area

SUBJECT KEYWORD (AND) SUBJECT KEYWORD

8. To find all items on a particular project

IDENTIFIER

9. To find all items on a particular project, of a certain bibtype

IDENTIFIER (AND) BIBTYPE CODE

10. To find all items on two or more subjects, concerning one country

SUBJECT KEYWORD (OR) SUBJECT KEYWORD  
(AND) SUBJECT KEYWORD (country name) ... etc.

### 6.4.3 Displaying and Printing Records Found

Whenever you are ready to display the records found by your search on the screen, or to print them, select *VIEW* documents from among the options listed at the bottom of a processed *SEARCH SCREEN*. MicroDIS retrieves the bibliographic citations for the **TOTAL** number of records identified as a result of the last search statement.

As soon as you select *VIEW* MicroDIS begins displaying the records as they are retrieved. Each record is numbered as *Retrieved record # ...* and includes only the title and call number.

After displaying as many citations as will fit on one screen, MicroDIS stops and lists a series of options (Figure 6.21) at the bottom of the screen.

Figure 6.21

```
.....  
| Forward | Backup | Print | New view | Mark for print | EXIT |  
.....
```

#### DISPLAYING RECORDS ON THE SCREEN:

Select <f>orward to continue looking at the records on the screen in the same format.

Select <b>ackup to redisplay the records on the previous screen (if the records displayed span several screens).

Select <n>ew view to look at the records on the screen, but in a different format. The following choices of formats are then displayed:

Figure 6.22

```
Which citation viewing format would you like?  
1 ... short form - call number and title only  
2 ... brief form - above plus author, pagination, pubdate, language  
3 ... long form - everything except keywords  
4 ... complete citation  
  
The current viewing format number is 1  
      new viewing format _  
      start with record # ____
```

Enter the number of the format you want to display the records in. You can start the display with any record by entering the *retrieved record #* that you want to start with.

Note that formats 3 and 4 include the name of the field (field tag) as well as the information in each field displayed. The complete citation (4) includes descriptors/identifiers. These take longer to retrieve and display.

Therefore, only select this option if you are sure that you want it or need it.

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## MARKING RECORDS DISPLAYED FOR PRINTING:

Another option available to you is to <m>ark selected records for later printing. If you select this option the bottom of the display screen is cleared and the following question is displayed:

*Enter number(s) of records you want to print*

Enter the number of the record you wish to print and MicroDIS will flag it. Repeat this procedure for all records you wish to mark.

## PRINTING RECORDS FOUND:

If you select the option to <p>rint, MicroDIS displays the following:

Figure 6.22a

```

=====
Which retrieved records to you want to print?
-----
ALL  search results
MARKED records from results
ONE  specified record

EXIT? return to search browsing
=====
```

If you select <a>ll, all records found in your search will be printed.

If you select <m>arked, only those records which you marked while browsing the search results will be printed.

If you select <o>ne, MicroDIS asks you to specify which record is to be printed.

If you select <e>xit, you can return to displaying the records on the screen, or then select from among other options to continue the search, start a new search or quit.

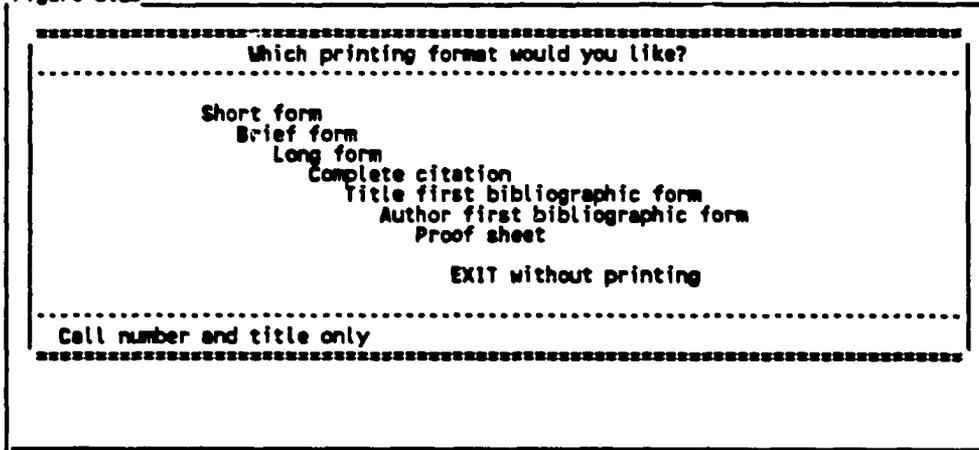
If you select any of the first three, MicroDIS displays the *PRINT FORMAT SELECTION MENU* (Figure 6.23).

The first four print formats are identical to the four formats you can use in displaying records on the screen.

The next two print formats do not contain field names (field tags). The call number, title, author, pagination and publication date are printed in paragraph format. All citations requested are then sorted in call number order by author's last name or the first word in the title.

The last print format, *Proof Sheet*, lists all field tags in a column at the left of the page in the order in which they are presented on the *Data Entry Screens*. Each tag is followed by either the data entered in that field, or by a blank line if the field was left empty (see page 6-64 for an example). This format is intended primarily for use in proofreading/editing.

Figure 6.23



After selecting the desired format, MicroDIS asks:

*Report to <P>rinter or to <D>isk?*

If you select <p>rinter, you will see the following message:

*Please set up the printer - hit <Spacebar> to start report*

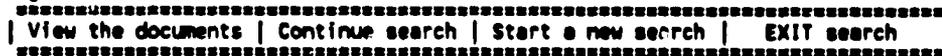
If you select <d>isk, MicroDIS will provide the following option:

*This report will be saved in a file named SEARCH.TXT  
If you want it saved in a different file, type the name  
now, up to eight letters. Just hit <CR> to use SEARCH.TXT.*

*File name --->*

This option enables you to incorporate the search results into a report or memo, and/or edit them using a word processor. When you have completed displaying or printing records and elect to <e>xit, MicroDIS redisplay the following options:

Figure 6.23a



## 6.5 REPORT ON CATALOG DATABASE

The *REPORT* function enables information center staff to periodically view and/or produce print-outs of all or part of the catalog database.

There are basically three types of reports available:

- (1) *Proof Sheet*: a printout of each record added or modified since the report was last run, listing each field name in the same order as in the data entry screens, followed by the data entered in that field; useful for editing.
- (2) *New Acquisitions*: a list of all records added to the catalog database within a specified range of dates; useful for alerting patrons to new materials available in the information center, or supplementing annual or bi-annual reports on the content of the entire database.
- (3) *Shelf List, Author Report, Title Report, Keyword List*: a list of all records in the database, sorted by either call number, last name of author, first major word of title, or keyword.

Depending upon the number of records in the catalog database, the process of printing the reports listed after (3) above can be extremely time-consuming, and may require a high-speed printer or other special printing arrangements (contact the MicroDIS technical support group in Washington D.C. for information). In general, it is not recommended that the author, title or keyword report be printed for databases exceeding 500 documents.

In addition to variations in intended use and frequency among these reports, there are also differences in print formats (i.e., the way the record appears), and options for displaying the report on the screen or copying it to either a hard or floppy disk.

Each of these reports is discussed in detail below.

**Note:** When printing any of the following reports, users sometimes encounter problems with their printer (e.g., uneven paper tension resulting in jamming of the printer). Be sure to check the position of the printer -- the paper should be able to flow evenly in and out.

### 6.5.1 Selecting a Report

After you select *REPORT* from the *CATALOG MENU*, the *CATALOGING REPORT MENU* is displayed on the screen (see Figure 6.24).

Figure 6.24

```

***** CATALOG REPORT MENU *****
Shelf List
Proof Sheet
New Acquisitions
Author Report
Title Report
Keyword List

EXIT

-----
Display/print collection ordered by CALL NUMBER
-----
```

From this menu, select the report you want to produce by typing the first letter of that option, (e.g., <p> for Proof List).

<u>Name of Report</u>	<u>Frequency</u>	<u>All/Part of Database</u>	<u>Screen*</u>	<u>Printer</u>	<u>Disk**</u>
Shelf List	1-2/year	all or part	yes	yes	yes
Proof Sheet	any time	part	no	yes	no
New Acquisitions	monthly/qty.	part	no	yes	no
Author Report	1-2/year	all or part	yes	yes	yes
Title Report	1-2/year	all of part	yes	yes	yes
Keyword List	1-2/year	all or part	yes	yes	yes

Any reports directed to the Screen (\*) provide an optional exit at the end of each screen. Reports directed to the Printer or Disk run continuously.

Reports directed to the Disk (\*\*) may be copied either onto a hard disk or floppy disk, though the latter is only useful if all records will fit on one disk. Selecting the Disk option enables you to edit the report and include it as part of a larger document, using word processing software.

## 6.5.2 Producing a Shelf List Report

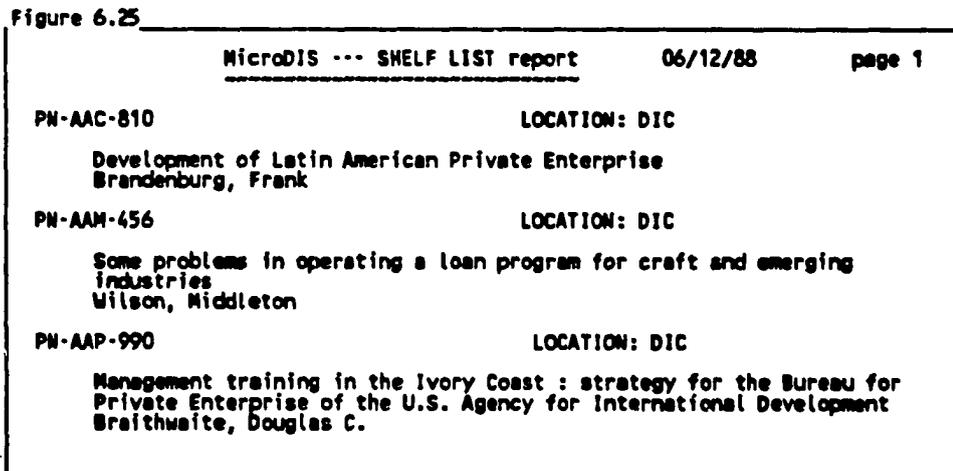
The *Shelf List Report* lists each record in order by call number. You can specify whether the report should include all or part of the database.

Production of this report for the entire database can be extremely time consuming. However, if the classification scheme is subject-based, it is possible to print one subject class at a time, thus minimizing the length of time that the PC is tied up while printing (see Section 6.5.2.3 below).exceeding 500 records contact the MicroDIS Technical Support Group in Washington, D.C., for more information before proceeding to run this report.)

Each record is presented in the following format:

CALL NUMBER            LOCATION:  
TITLE  
AUTHOR

For example:



When you select this report, the following messages are displayed:

### *Catalog Shelf List Report*

*Lists the entire collection in call number order OR a portion of the collection*

*Do you want to display the <E>ntire file, <R>estart a prior report in the middle or do you want to list only a <P>ortion of the collection:*

Each of these options is discussed separately below.

### 6.5.2.1 Producing the Entire Shelf List Report

If you indicate that you want to produce an <e>ntire report, the following messages appear:

*Report to <S>creen, <P>rinter, or <D>isk?  
or hit <F9> to EXIT*

(a) If you select <s>creen, the next message is:

*Hit <Spacebar> to continue or <F9> to EXIT*

*The Shelf List Report is then displayed on the screen. After every four records you have the option to Press <Spacebar> to continue or <F9> to EXIT*

(b) If you select <p>rinter, the next message is:

*Will report be printed on a <N>arrow or <W>ide carriage printer?  
respond <N>/<W>*

*followed by:*

*Hit <Spacebar> to start printing*

*followed by a message which counts each record as it is printed:*

*Number of records printed*

(c) If you select <d>isk, the next message is:

*This report will be saved in a file named CR\_SHELF.TXT  
If you want it saved in a different file, type the name  
now, up to eight letters. Just hit <Return> to use CR\_SHELF.TXT*

*File name*

*In other words, the output will go onto disk as an ASCII file so that you can edit it before printing it out. The means by which you edit the file are up to you (e.g., word processing software, or Edlin, the DOS editor). The file that it is stored in can be named anything you like, but the name cannot be longer than eight characters. (You can direct the file to a floppy disk by prefacing the filename with the disk drive, e.g., a:EGSHELF.) You do not have to add the filename extension (e.g., .txt). The next prompt asks:*

*Will report be printed on a <N>arrow or <W>ide carriage printer?  
respond <N>/<W>*

*and copying onto disk begins.*

### 6.5.2.2 Restarting a Prior Shelf List Report

You may need to <r>estart a prior report in the instance that the printer jams or you need to stop printing for some reason. After selecting this option, MicroDIS asks you to:

*Type in the call number where you wish to restart the report  
or hit <F9> to EXIT --->*

In other words, type in the last call number that printed out. Then:

*Enter the number of the last page printed ->*

Finally specify:

*Report to <S>creen, <P>rinter, or <D>isk?  
or hit <F9> to EXIT --->*

The same messages appear for each of these options, as outlined in (a)-(c) in Section 6.5.2.1.

### 6.5.2.3 Listing Part of the Shelf List

If you indicate that you want to list only a <p>ortion of the collection, the following messages appear:

*Type in the significant characters of the call number which define  
the portion of the collection to be processed,  
or hit <F9> to EXIT*

For example, if you want to list only those records in one subject class (normally indicated by the first part of the call number), type in the class code. The next message asks:

*Enter the number of the last page printed*

You may respond by entering 0 or pressing <Return> if there is no "last page."  
Finally, specify:

*Report to <S>creen, <P>rinter, or <D>isk?  
or hit <F9> to EXIT*

To view the subsequent messages associated with each of these options, see (a)-(c) in Section 6.5.2.1 above.



When you select this report on the *CATALOGING REPORT MENU*, the following message is displayed:

*Catalog Bibliographic Report*

*Lists all NEW or MODIFIED documents in order entered.*

*WARNING - this report appears on the printer only!  
Do you want to continue? <Y>es/<N>o*

If you respond <n>o, you return to the *CATALOGING REPORT MENU*.

If you respond <y>es, the next message asks:

*Do you wish to RESTART an interrupted report or run? <Y>es/<N>o*

If <y>es:

*Enter the CALL NUMBER of the record where you want the report to  
restart -->*

Regardless of whether you want to begin or restart the report, you are next prompted to:

*PLEASE SET UP THE PRINTER*

*\_\_\_ document citations will be printed*

*Press <Spacebar> to continue or <F9> to EXIT*

The report then prints out. You have the option of retaining these call numbers in a temporary file so that you can print them again in proof sheetformat (e.g., in the event that the printer jammed and not all records printed out). Otherwise, you can clear the temporary file so that it keeps track of only the new additions and modifications to be printed the next time you use this format. Select the desired option at the next prompt:

*Do you want these citations to appear on the next proof sheet  
report? <Y>es/<N>o*

You can then exit from this report back to the *CATALOGING REPORT MENU*.

Note: You can also obtain a copy of a specific record in proof sheet format at any time by using the print options within *SEARCH*. First retrieve the record, then print it out in proof sheet format.

#### 6.5.4 Producing a New Acquisitions Report

The *New Acquisitions Report* lists all records added to the catalog database within a specified period of time. The report is particularly useful as a means of alerting patrons to materials which have been recently added to the collection, or are accessible through a network of other collections. If an information center chooses to provide patrons with a paper-copy catalog (e.g., *Author, Title and/or Keyword Reports*) produced on an annual or semi-annual basis, the *New Acquisitions Report* can also be used as a quarterly or monthly supplement.

The report can only be produced on a printer.

Individual records are printed by subject class in the following format:

Title	Author	Pagination	Date
Call Number			

To determine the subject class, MicroDIS looks at the call number and matches it against the *Call Number Prefix Authority File*. The corresponding description for each prefix is printed out as the subject class heading (e.g., call number = AGR-001, call number prefix = AGR, subject class description = AGRICULTURE). (To activate this feature, the *SYSTEMS UTILITIES -- CONFIGURE* screen must show the *Call Number Significant Digits* as greater than zero. Refer to *Section 8: SYSTEM UTILITIES* for more information.)

For example:

Figure 6.27

```
Development Information Center
New Acquisitions
(Starting Date - Ending Date)

(SUBJECT CLASS NAME APPEARS HERE)

Directory of U.S. courses in biotechnology for developing countries.
Board for Science and Technology in Development
TEST-001 195p. MD
```

When you select this report, the following message is displayed:

*Catalog Acquisitions Report*

*Lists all NEW documents in site code/call number order.*

**WARNING - this report appears on the printer only!**

**Do you want to continue? <Y>es/<N>o**

If you respond <y>es, the next message asks:

*Will report be printed on a <N>arrow or <W>ide carriage printer?  
respond <N>/<W> -->*

You must respond; a <Return> results in redisplay of the message. Following your response, you are asked:

**DATE RANGE**

*Enter starting date of range  
(MM/DD/YY) --> / /*

*Enter ending date of range  
(MM/DD/YY) --> / /*

*Press <F9> to EXIT*

This gives you control over the time period you want to cover in each report (e.g., weekly, monthly, quarterly). You must enter a date into the highlighted space provided on the screen, or an error message appears (e.g., *Month Invalid, or, Day Invalid*). Month and day must be entered as two digits (e.g., 01 not 1).

The next message asks you to:

*Please set up the printer  
then hit the <Spacebar> to continue*

You are given one more option to continue or exit. Then, MicroDIS displays a counter of each record as it is printed:

*Record being printed*

When finished, you are prompted to:

*Hit <F9> to EXIT*

and you return to the **CATALOGING REPORT MENU**.

### **6.5.5 Producing an Author Report**

The *Author Report* lists all records in the catalog database in alphabetical order by author's last name (or the first word in an institutional author's name). If the catalog record identifies more than one author for a document, the record is repeated in the listing under each author's name (e.g., if there are five authors, the record appears five times).

Production of this report for the entire database can be extremely time consuming. (It is recommended that MicroDIS installations with databases exceeding 500 records contact the MicroDIS Technical Support Group in Washington, D.C., for more information before proceeding to run this report.)

Each record is displayed in the following format:

**AUTHOR (Last name, First name or initials)**  
**Title**  
**Site Code    Call Number            Pagination            Date**

For example:

Figure 6.28

MicroDIS -- Author Report		07/14/88	page 1
ASHRAF, MALIK	Case study of on - farm adaptive research at Bida agricultural development project, Nigeria PN-AAU-891	p.190-215	86/52
BADR, MAHMOUD	Small enterprises in Egypt : a study of two governorates PN-AAU-610	102p.	84/04
BERRY, ALBERT	Small enterprise development program for Ecuador strategy paper PN-AAS-721	115p.	85/06

When you select this report from the *CATALOGING REPORT MENU*, the following message is displayed:

*Catalog Author Report*

*Lists the collection in author order*

*Report to <S>creen, <P>rinter, or <D>isk,  
or hit <F9> to EXIT*

Each of these options is explained in Section 6.5.2.1 above. (If you divert the report to the disk, the assigned file name is CR\_AUTH.TXT. You can, of course assign your own filename.)

Regardless of the choice, you are then asked:

*Do you wish to run this report from the <B>eginning, <R>estart a  
previous report at a specific author or select records based  
upon a <D>ate range? -->*

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To <r>estart in the event that the printer jammed or you had to stop the report, you are prompted to:

*Enter the author's name (may be truncated) where you wish this report to restart or hit <F9> to EXIT*

*Enter the last page number printed*

To produce a report by <d>ate range, you are prompted to:

*Enter the starting date of range*

*Enter the ending date of range.*

When finished, you are prompted to exit back to the *CATALOGING REPORT MENU*.

### 6.5.6 Producing a Title Report

The *Title Report* lists all or a portion of the records in the catalog database, sorted by the first major word in the title.

Production of this report for the entire database can be extremely time consuming. (It is recommended that MicroDIS installations with databases exceeding 500 records contact the MicroDIS Technical Support Group in Washington, D.C., for more information before proceeding to run this report.)

The records in this report appear in the following format:

Title	Author	Call Number	Pagination	Date of Publication
-------	--------	-------------	------------	---------------------

For example:

Figure 6.29

MicroDIS --- Title Report	06/22/88	Page	5
Approach to evaluating "non-project" assistance : final report Morse, Victoria A. PN-AAQ-320	24p. + 3 attachments	84/06	
Concluding report : weed control systems utilization for representative farms in developing countries Miller, S.F. PN-AAT-948	iii, 102p.	85/12	

When you select this report from the **CATALOGING REPORT MENU**, the following messages appear:

*Catalog Title Report*

*Lists collection in title order*

*Do you wish to start report at the <B>eginning of the file,  
<R>estart the report in the middle, or select records based  
upon a <D>ate range?*

**6.5.6.1 Starting at the Beginning of Title Report**

If you indicate that you want the report to start at the <b>eginning of the database, the following message is displayed:

*Report to <S>creen, <P>rinter, or <D>isk,  
or hit <F9> to EXIT*

Follow the subsequent messages as displayed in (a)-(c) of Section 6.5.2.1.

**6.5.6.2 Restarting the Title Report**

If you indicate that you want to <r>estart the report, the following message is displayed:

*Enter up to the first 50 characters of title to begin with  
or hit <F9> to EXIT*

Next, you are asked to:

*Enter the number of the last page printed*

Finally, respond to the message:

*Report to <S>creen, <P>rinter, or <D>isk,  
or hit <F9> to EXIT*

Follow the subsequent messages as displayed in (a)-(c) of Section 6.5.2.1.

### 6.5.6.3 Producing the Title Report by Date Range

If you want to print out only those titles added to the catalog during a specified <d>ate range, the following message is displayed:

#### DATE RANGE

Enter starting date of range  
(MM/DD/YY) --> / /

Enter ending date of range  
(MM/DD/YY) --> / /

Be sure to add two-digit numeric data in the highlighted area of the screen. If non-numeric or incomplete dates are specified, an error message appear.

After specifying the date range, the following message is displayed:

Report to <S>creen, <P>rinter, or <D>isk,  
or hit <F9> to EXIT

Follow the subsequent messages as displayed in (a)-(c) of Section 6.5.2.1.

### 6.5.7 Producing a Keyword List Report

The *Keyword List Report* produces a listing of all catalog database by subject keyword (descriptors only). If 10 descriptors have been used to describe the subject content of an item, the catalog record for that item appears 10 times in this report, once under each descriptor. The descriptors are displayed in alphabetical order. The records under each keyword are in call number order.

Production of this report for the entire database can be extremely time consuming. (It is recommended that MicroDIS installations with databases exceeding 500 records contact the MicroDIS Technical Support Group in Washington, D.C., for more information before proceeding to run this report.)

The format of the records follows the example below:

Figure 6.30

MicroDIS -- Descriptor Report	07/04/88	page 5
AGRIBUSINESS		
Technology and management needs of small and medium agro-industrial enterprises in Kenya: implications for an international agro-industrial service center.		
Wood, Dennis H. PN-AAM-016	vi, 79p.	81/06
Management training in the Ivory Coast : strategy for the Bureau for Private Enterprise of the U.S. Agency for International Development		
Braithwaite, Douglas C. PN-AAP-990	v, 26p.	83/

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After selecting this report, the following message is displayed:

*Catalog Descriptor Report*

*Lists the entire collection in descriptor order*

*Report to <S>creen, <P>rinter, or <D>isk,  
or hit <F9> to EXIT --->*

Follow the messages as displayed in (a)-(c) of Section 6.5.2.1 in responding to these options.

The next message asks:

*Do you wish to run this report from the <B>eginning, <R>estart a  
previous report at a specific descriptor/identifier, or select records  
based upon a <D>ate range? -->*

Follow the messages displayed for these options in Section 6.5.6.1-3 above.

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## 6.6 USING THE CATALOG UTILITIES

Catalog "utilities" enable you to perform some special functions within the *CATALOG* module. These functions are only likely to be needed on an irregular basis, and it is possible that you may never need to use any of them. The utilities available to you are listed on the *CATALOG UTILITIES MENU* (Figure 6.31).

Figure 6.31

```
***** CATALOG UTILITIES MENU *****
Receive Records
Send Records
Change Site Code/Call number
Verify Fast Access File Integrity
EXIT
-----
Add entries to catalog from another site
-----
```

Each of these special functions is described in the remainder of this section.

### 6.6.1 Receive Records

Use this utility to upload citations on floppy disk from another MicroDIS installation. If the records received are on more than one floppy disk, repeat the following process over again for each disk.

When you select *RECEIVE*, MicroDIS displays the following message:

Figure 6.31a

```
Use RECEIVE whenever you want to add records to your catalog
database from another site.

You will receive these records on floppy disk, where they
are stored in a file. The name of the file should be
indicated on the disk label (or in accompanying correspondence).

If you do not wish to continue RECEIVE, hit <F9> to exit.

If you are continuing RECEIVE, INSERT THE FLOPPY DISK NOW.

Type in the name of the file containing the records you
want to RECEIVE and press <Return> ====> _:_____
```

The format and punctuation for entering the filename is as follows:

disk drive:filename.file extension

The three-character file extension will always be .txt. For example:

a:caironew.txt  
b:redso.txt

After you provide the name of the data file to be loaded, MicroDIS tells you how many records are to be added, and then displays the content of each record, field-by-field, on the screen.

If a site code/call number is identical to one already in your database, a flashing message appears as follows:

*DUPLICATE RECORD -- not added*

This duplicate checking prevents you from receiving a record which you have previously sent to another site (as long as the site code/call number have not been changed by that site).

Otherwise, MicroDIS adds each record to the catalog database and updates the corresponding fast access files. When finished processing the entire set of records, MicroDIS displays a message indicating how many citations were read, and how many were added to the database. You are then prompted to return to the *CATALOG UTILITIES MENU*.

There are several aspects of this process that are important to consider before beginning:

1. Time.

The process of adding the records and updating the fast access files can be time consuming. Be sure to allow ample time to perform this task: on an IBM PC/XT, estimate at least one and one half minutes per record; on a WANG PC, the required time might be slightly less. When adding to large databases (e.g., 5,000 records) the process will take longer.

2. Impact on fast access and authority files.

All fast access files are updated (author, title, bibtype, subject keyword). Received records can thus be retrieved in the same manner as local records using *SEARCH*.

The *Subject Keyword Authority File* is updated. If a keyword appears in a record received, but not in the keyword authority file, the new keyword is added to the authority file.

The other relevant local authority files are not changed (bibtypes, site codes, call number prefixes).

If you want to be able to retain the original site code in your database (so as to be able to identify the holding location), be sure to add the received site code to your local *Installation Site Code Authority File* before beginning the *RECEIVE* process. Otherwise, MicroDIS will interpret and record the site code as NONE.

3. Impact on reports.

Received records will appear in all reports.

For the *New Acquisitions Report*, the call numbers should match an entry in the *Call Number Prefix Authority File*; otherwise the entries will be listed under the subject heading: Unknown Call # Prefix. The *Call Number Prefix Authority File* may be updated either before or after the records are received. See *Section 8.1: MAINTAIN AUTHORITY FILES*, for information on adding to the *Installation Site Codes Authority File*.

#### 6.6.2 Send Records

Use this utility to download citations onto floppy disk in order to transfer records from your MicroDIS installation to another site. This process creates a standard ASCII file which can be read by MicroDIS *RECEIVE*, by the A.I.D./Washington Development Information System (using the MINISIS software package), or by a custom-written program.

Note that when sending records to another MicroDIS site, you must provide that site with records copied onto floppy disk through *SEND*. A backup copy of your database (created with the DOS backup command) will not suffice.

If the number of records to be sent require more than one floppy disk, you will be automatically prompted to insert additional disks.

When this utility is selected, MicroDIS displays the following message:

Figure 6.31b

```
Use SEND whenever you want to send a copy of selected catalog
records to another site.

You can send either:
- all records added to your catalog within a specific time
  period (a.g., one month, one quarter), or,
- records identified by your LAST search of the catalog
  (e.g., on a particular subject).

These records will be copied into a file on either a floppy disk
or the hard disk.

MicroDIS will now ask you to indicate which method you want to use
to select records for SENDing, and then to supply a name for the
file

Do you want to continue with SEND? <Y>es/<N>o
```

If you respond <n>o, you return to the *CATALOG UTILITIES MENU*.

If you respond <y>es, MicroDIS asks:

*Do you want to SEND the records added to your database within a  
<D>ate range, or identified by your last <S>earch?*

After making your selection, the next screen is displayed:

Figure 6.31c

```
Identify the disk (e.g., a:, b:, c: etc.) and the name of the file
into which you want the records copied. You can assign any filename
up to 8 characters long. MicroDIS will automatically assign a file
extension of .TXT to the name provided. For example:

To copy records to a floppy disk, type:
    a:cairo      (disk drive a:, filename CAIRO.TXT)

To copy records to a hard disk, type for example:
    c:nairobi   (disk drive c:, filename NAIROBI.TXT)

It is imperative that you identify the disk drive to be used.

Note: if the number of records to be copied exceeds the capacity of
one disk, you will be prompted to provide additional disks.

If you do not want to continue SEND, hit <F9> to exit.

If you are copying records onto a floppy disk, INSERT THE DISK NOW.

Type in the filename and press <Return> >>>> _:_____
```

If you earlier selected the option to copy all the records within a particular date range, you are then prompted as follows:

*Enter the starting date of range*

*(MM/DD/YY) --> / /*

*Enter ending date of range*

*(MM/DD/YY) --> / /*

*Press <F9> to EXIT.*

MicroDIS then locates and displays the number of records copied to disk. When finished, the final message indicates:

*SEND completed -- hit <Spacebar> to return to CATALOG UTILITIES menu*

Remove floppy disk(s) and label.

### **6.6.3 Change Site Code/Call #**

This utility is used to change the site code and/or call number of records on the database. For example, this process may be used to recatalog an item in your own collection (e.g., change or correct a call number), or copy catalog using a record received from another site.

When this utility is selected, MicroDIS displays the following message:

*Enter the SITE CODE and CALL NUMBER of the  
document you want to recatalog press <Return>*

*site code:*

*call number:*

*Press <F9> to EXIT*

If the designated site code/call number combination is not found, MicroDIS displays an error message and repeats the above "request for record identification." You may have made a typographical error in entering the number.

If the specified record is found, MicroDIS displays a partial record so that you can verify that the record indeed matches the item you wish to recatalog.

Figure 6.32

The document is	
SITE CODE: USAID/WASH	CALL NUMBER: PD-AAT-785
AUTHOR1: U.S. Agency for International Development	
AUTHOR2: Goshen, Carolyn	
TITLE: Training: Why and How to	
COPIES: 1	LOCATION: AID Lib
PUB DATE: 88/01	PAGINATION: 55p
Do you want to change the SITE CODE/CALL #? <Y>es/<N>o	

If you respond <n>o to the confirmation question at the bottom of the screen, MicroDIS clears the screen and redisplay the "request for record identification."

If you respond <y>es, MicroDIS displays the following:

*OLD site code*

*NEW site code*

*OLD call number*

*NEW call number*

A new site code must be entered in all capital letters, and must match an entry in the *Installation Site Code Authority File*. If either of these conditions is not met, MicroDIS will assign "NONE" as the site code.

If you have configured your installation to check the *Call Number Significant Digits* (see *SYSTEM UTILITIES -- CONFIGURE*), a newly assigned call number will be validated against the *Call Number Prefix Authority File*. If the new call number does not match any entry in that file, MicroDIS will indicate that you have assigned an invalid call number prefix.

The information supplied is then verified to ensure that the combined site code/call number is unique. If it is not unique an error message is displayed:

*NEW CALL# not valid - already exists*  
*Do you wish to reenter new call#? <Y>es/<N>o*

If the new site code/call number supplied is accepted, MicroDIS recatalogs the record and displays the following messages:

*The document has been recataloged*  
*Press <Spacebar> to continue*

Upon continuing, MicroDIS redisplay the "request for record identification" message and awaits your response.

#### 6.6.4 Verify Fast Access File Integrity

##### 6.6.4.1 Description of the Purpose and Use of the Utility

This utility verifies that the contents of the fast access files match the contents of associated fields in the catalog database, and that entries in the fast access files are stored as efficiently as possible. Specifically, it checks to make sure that all authors, bibtypes, subject keywords and title words in the document database appear in the corresponding fast access files, and that all entries in the fast access files match and are correctly linked to records in the catalog database. If a fast access file entry is missing, it is added. If a fast access file entry is incorrectly linked to a record, that link is removed. The resulting, verified fast access files can then be 'compressed' to remove any fast access file entries no longer linked to ANY records, and to store the remaining entries as efficiently as possible.

As long as MicroDIS appears to be running smoothly, use of this utility is optional. It is suggested that it be used: (1) as an annual or semi-annual maintenance procedure, or (2) prior to printing either the *Author Report* or *Keyword List Report* (see Section 6.5). Running it in the latter instance ensures that no author names or subject keywords will be listed in the reports which have no corresponding bibliographic citations underneath. (For example, if you viewed the author fast access file through *CATALOG -- SEARCH*, you might see an entry showing: 0 Rondinelli, Dennis. This means that at one time, a catalog record was added with this author's name, and then either the record was subsequently deleted or the spelling of the author's name was modified. The fast access entry is thus no longer linked to any records. When printing an *Author Report*, the name Rondinelli, Dennis will be listed, but no records will appear underneath the name.)

The second situation in which this utility can be used is when the fast access files have somehow been damaged (e.g., by a power failure) and no longer appear to be correctly linked to catalog database records. This utility can then recreate the fast access files directly from catalog records. Note that in many cases, this type of problem can be corrected by using the *SYSTEMS UTILITIES -- REBUILD* utility, or by restoring the last backup copy. If those options do not work, then use this utility to try to resolve the problem.

Note that whether using this utility for routine maintenance or to correct damage to fast access files, it will take some time for MicroDIS to complete all operations in the utility for all fast access files. The amount of time required increases as the size of the database increases.

Because of the time involved in completing some of the fast access file verification operations, the process is broken down into three steps:

- (1) Check document records against the fast access file (add missing entries).
- (2) Check the fast access file against document records (delete incorrect links to records).
- (3) Compress fast access files (delete entries with no links and reorganize storage of entries).

Further, each operation can be run against one fast access file at a time:

- (1) Author
- (2) Bibtype
- (3) Subject keyword
- (4) Title word

It is recommended that any of these operations be run at a time when MicroDIS will not be needed for routine access, and that all three operations be completed for one fast access file before going on to the next. You may stop between operations, but it is not recommended that you interrupt an operation (otherwise, you will have to start over again).

#### 6.6.4.2 How the Utility Works

If you select this option from the *CATALOG UTILITIES MENU*, the following sub-menu is displayed at the lower left of the screen:

Figure 6.33a

```
***** CATALOG UTILITIES MENU *****
Receive Records
Send Records
Change Site Code/Call number
Verify Fast Access File Integrity
EXIT
-----
Verify contents of database against fast access files
-----
*****
Which Fast Access Utility?
-----
DOCUMENT -> Fast Access
Fast Access -> DOCUMENT
Compress Fast Access Files
EXIT
*****
```

If you select one of the three operations, another sub-menu is displayed at the lower right of the screen:

Figure 6.33b

```
***** CATALOG UTILITIES MENU *****
Receive Records
Send Records
Change Site Code/Call number
Verify Fast Access File Integrity
EXIT
-----
Verify contents of database against fast access files
-----
*****
Which Fast Access Utility?
-----
DOCUMENT -> Fast Access
Fast Access -> DOCUMENT
Compress Fast Access Files
EXIT
*****
*****
Which Fast Access File?
-----
Author
BibType
Subject Keyword
Title Words
EXIT
*****
```

If you select the first operation (DOCUMENT -> Fast Access), the following messages appear:

*This utility reads the DOCUMENT file and verifies that the contents exist on the selected fast access file. Indexes should be rebuilt and the database backed up prior to running this utility.*

*Press <Spacebar> to continue or <F9> to EXIT*

*Do you wish a log file of corrections and messages generated? <Y>es/<N>o*

This log file is a listing of all corrections made, including the call number of each record and the associated change. This list will be captured in a DOS file (which can be subsequently printed out or displayed on the screen). The file name always begins with the letter T, followed by the time at which the file is created, followed by the file extension .LOG. For example, a file created at 2:25 p.m. will be labeled: T142501.LOG.

Thus, if you respond <y>es to the above question, the next message reads:

*The log file to be created will be named ... T142501.LOG  
and will be placed on the default data drive ... C  
The file will be deleted if there are no entries generated.*

*Press <Spacebar> to continue*

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Once you continue, MicroDIS displays a series of lines showing you the status of the operation:

*Number of records on file*  
*Number of current record*  
*Number of records fixed*

*Procedure has completed*

*Press <Spacebar> to continue*

A similar process is followed for the other two operations (FAST ACCESS -> Document and Compress Fast Access Files).

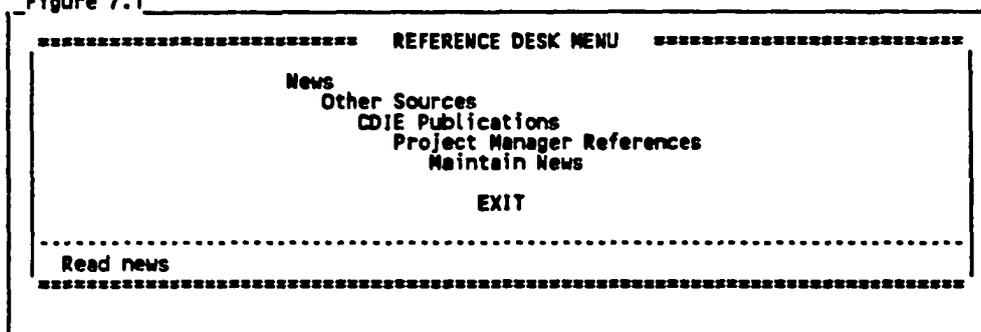
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## SECTION 7: REFERENCE DESK

### 7.0 INTRODUCTION

The *REFERENCE DESK* contains information about other resources and publications which may be of interest to users involved in economic development. Unlike other MicroDIS modules, the information contained in the *REFERENCE DESK* is maintained in text files rather than databases. Access to these files is provided through the options listed on the *REFERENCE DESK MENU* (Figure 7.1).

Figure 7.1



Select *NEWS* to read about MicroDIS or local information center developments. The news can be changed as desired by each site using the function, *MAINTAIN NEWS*.

Select *OTHER SOURCES* to read descriptions of several other information sources available through A.I.D.'s Center for Development Information and Evaluation (CDIE).

Select *CDIE PUBLICATIONS* to view a list of evaluative reports produced by the A.I.D.'s Center for Development Information and Evaluation (CDIE).

Select *PROJECT MANAGER REFERENCES* to read syntheses of A.I.D.'s experience in on selected topics.

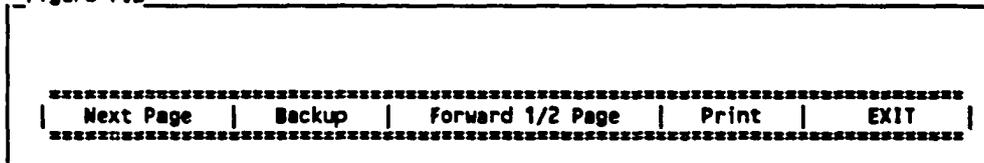
Select *MAINTAIN NEWS* to update the information contained in the *NEWS* file.

## 7.1 NEWS

The *NEWS* file can be used as a "clippings service", as a bulletin board, or as anything you wish. The information contained in this file is totally under the control of each MicroDIS installation.

When you select *NEWS*, the information contained in the associated text file is displayed on the screen. To move forward or backward through the text, use the commands listed at the bottom of the screen (Figure 7.2).

Figure 7.2



You may even print the file.

When you have finished reading the text and you elect to *EXIT*, MicroDIS returns you to the *REFERENCE DESK* menu (Figure 7.1).

## 7.2 OTHER SOURCES

The *OTHER SOURCES* contains descriptions of other information services and resources available through A.I.D.'s Center for Development Information and Evaluation (CDIE). These services are available to A.I.D. staff and contractors, and to host country development-related agencies. The topics are listed out on a table of contents (Figure 7.3).

Figure 7.3

```
REFERENCE DESK -- OTHER SOURCES OF INFORMATION

                                TABLE OF CONTENTS

01. About CDIE
02. Document Acquisitions
03. Agr. Technical Inquiry Service
04. A.I.D. Library
05. A.I.D.'s Evaluation System
06. Development Information System
07. Economic and Social Data Services
08. MicroDIS
09. Non-A.I.D. Sources of Information
10. Obtaining Docs. or Publications
11. Publications
12. Research & Reference
13. Technical Assistance

                                Hit <F9> to EXIT      selection:
```

To read about one of the topics, type in the corresponding number from the table of contents after the prompt, *selection:*.

Displayed after the text at the bottom of each screen are several options which permit you to browse forward and backward through the text (Figure 7.2), or to print the text.

When you have finished the text and you elect to EXIT, MicroDIS returns you to the *Table of Contents*, from which you can select another topic or EXIT back to the *REFERENCE DESK MENU*.

### 7.3 CDIE PUBLICATIONS

A.I.D.'s Center for Development Information and Evaluation prepares and issues several types of evaluation reports. These are not evaluations of specific A.I.D. projects, but rather of A.I.D.'s experience in selected development sectors.

*CDIE PUBLICATIONS* contains a list of these reports by topic, as well as information about how to order them. Select the topic of interest by typing the corresponding number next to the prompt, *selection:*.

Figure 7.4

REFERENCE DESK - CDIE PUBLICATIONS	
TABLE OF CONTENTS	
01. How to Order Publications	18. Water
02. Agriculture	19. Women in Development
03. Country Studies	20. REPORTS IN PROGRESS
04. Development Management	
05. Education	
06. Energy	
07. Food Aid	
08. Health/Nutrition Projects	
09. Institution Building	
10. Local Government	
11. Population/Family Planning	
12. Private Sector	
13. Private Voluntary Organizations	
14. Program Design & Evaluation	
15. Roads	
16. Rural Area Development	
17. Small-Scale Enterprises	

Hit <F9> to EXIT      selection:

Displayed at the bottom of each screen are several options which permit you to browse forward and backward through the list (Figure 7.2), or to print the file.

When you have finished viewing the list and you elect to EXIT, MicroDIS returns you to the *Table of Contents*, from which you can select another topic or EXIT back to the *REFERENCE DESK MENU* (Figure 7.1).

## 7.4 PROJECT MANAGER REFERENCES

The *PROJECT MANAGER REFERENCES* include the full text of selected reports prepared by A.I.D.'s Center for Development Information and Evaluation (CDIE). These reports provide background information on selected topics. The topics available currently are listed on the *PMR Selection Menu* (Figure 7.5).

Figure 7.5

```

                                PMR SELECTION MENU
                                -----
01. Contraceptive Social Marketing
02. Credit Progs for Small Farmers

                                Hit <F9> to EXIT   selection:

```

Following selection of a topic, the *Table of Contents* for the text is displayed, as in the example below (Figure 7.6).

Figure 7.6

```

PRM - CONTRACEPTIVE SOCIAL MARKETING

                                TABLE OF CONTENTS

**** Preliminary, Unofficial ****
01. CSM Program Goals
02. Host Government Policy
03. AID Procedures and Regulations
04. Country-Environment Factors
05. Organization and Management
06. Distribution Systems
07. Product Choice and Pricing
08. Product Diversification
09. Promotion
10. Information Requirements
11. Data Collection Approaches
12. CSM Program History
13. AID Involvement Summary

                                Hit <F9> to EXIT   selection:

```

MicroDIS then displays the text you have requested. (The information contained in the references is produced and maintained by CDIE. New references and updates to old references will be provided by this office when they become available.)

Displayed at the bottom of each screen are several options which permit you to browse forward and backward through the text (Figure 7.2), or to print the text.

When you have finished the text and you select <F9> to EXIT, MicroDIS returns you to the *Table of Contents*, from which you can select another section of the report to view, or EXIT back to the *REFERENCE DESK MENU*.

## 7.5 MAINTAIN NEWS

To create or update the information contained in the *NEWS*, you must use a two-step process.

1. Type the text using any word processor which enables you to convert the file to/from ASCII format (American Standard Code for Information Interchange).
2. Use the option to *MAINTAIN NEWS* to import the file into MicroDIS.

To bring the text file into MicroDIS, select *RECEIVE NEWS FILE* from the following menu (Figure 7.7).

Figure 7.7

```
***** REFERENCE DESK MAINTENANCE *****
Send News File
Receive News File
EXIT
-----
Convert news file to text for updating
*****
```

You will not need the *SEND NEWS FILE* option if you maintain and retain your original word processing file of textual data. Whenever you want to update the information in MicroDIS, simply correct the word processing text file and import (*RECEIVE*) the updated text into the MicroDIS reference desk.

### 7.5.1 Reference Desk -- Send News File

If you want to correct or modify the text contained in the *NEWS* file, and you do not have a copy of the original word processing file, you need to use *SEND* to convert the text back into an ASCII file (and from there into a word processing document).

To convert the news file back into an ASCII file, respond to the following prompts.

*SELECT A FILE for exporting:*

*NEWS*  
*EXIT without export*

MicroDIS displays the following question:

*Type in the complete name of the destination text file, including drive letter, name and extension, or hit <F9> to abort*

An example of a destination text file name is as follows: A:news.txt. This would provide you with an ASCII file on floppy disk (drive A), named news.txt, which you can then convert into a word processing document for editing. (Note: It is possible to edit the file directly using EDLIN - the DOS line editor facility - but this is cumbersome and not recommended.)

After the MicroDIS file is converted, the *REFERENCE DESK MAINTENANCE MENU* (Figure 7.7) is redisplayed.

### 7.5.2 Reference Desk -- Receive News File

To bring an ASCII text file containing *NEWS* into MicroDIS, respond to the following prompts.

*SELECT A FILE to import:*

*NEWS*  
*EXIT without importing*

Then, MicroDIS asks:

*Type in the complete name of the source text  
file, including drive letter, name, and extension,  
or hit <F9> to abort*

An example of a source text file name is as follows: A:news.txt. This would bring an ASCII file named news.txt from floppy disk (in drive A) into MicroDIS.

When the process is completed, MicroDIS redisplayes the *REFERENCE DESK MAINTENANCE MENU* (Figure 7.7).

## SECTION 8: SYSTEM UTILITIES

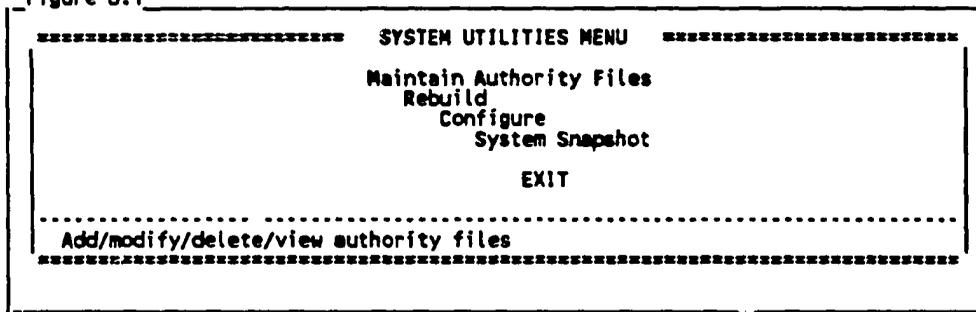
### 8.0 INTRODUCTION

Most MicroDIS modules are self-contained; each includes functions to add, modify and view data associated with that module. The *SYSTEM UTILITIES*, however, are special purpose functions which affect more than one module.

Normally, only the MicroDIS system manager or the person responsible for overall MicroDIS maintenance will access these special utilities. The utilities may be used only if the system password is entered when logging on.

The *SYSTEM UTILITIES MENU* lists the available functions (Figure 8.1).

Figure 8.1



Select *MAINTAIN* at any time to view, or to add/modify/delete, entries in any of the authority files.

Select *REBUILD* as needed to recreate MicroDIS sort indexes, e.g., if error messages indicate that MicroDIS cannot find some specified data.

Select *CONFIGURE* to change any of several characteristics about the way MicroDIS is set up in your installation, e.g., to change the password.

Select *SYSTEM SNAPSHOT* to check the size of various databases and index files.

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## 8.1 MAINTAIN AUTHORITY FILES

Select the *MAINTAIN* utility from the *SYSTEM UTILITIES MENU* in order to add to, modify, delete or view the contents of any of the MicroDIS authority files.

The authority files comprise lists of usable codes, acronyms or subject keywords defined and approved by each installation. The files are used either to validate data in certain modules as it is entered into MicroDIS, to enable MicroDIS to decode (or print out in full) the word equivalent of certain codes or messages during print and display operations, or to assist MicroDIS efficiency by specifying certain words that need not be stored in fast access files.

Some of the files, such as the *Title Stopwords Authority File*, are used only by one module (*DOCUMENT CATALOG*), while others, such as *Daily Log Activity Codes Authority File*, are used by several modules (*CIRCULATION*, *DAILY LOG*, *DOCUMENT CATALOG*).

MicroDIS is installed with some initial or suggested entries in each authority file. However, before implementing MicroDIS, the contents of the files should be checked as part of the installation procedure to delete inappropriate entries and add local codes, acronyms, etc.

Thereafter, each MicroDIS site can add to, modify or delete the contents of each authority file in order to tailor it to local needs. It is important that the MicroDIS system manager be aware of the impact of any authority file update. The contents of authority files can be displayed at any time without any effect on the file.

You need only maintain those authority files which relate to the specific modules and functions used by your site.

### 8.1.1 Overview of the Authority Files

To maintain or view any authority file, first select the desired file from the *AUTHORITY FILE MAINTENANCE MENU* (Figure 8.2).

Figure 8.2

```
***** AUTHORITY FILE MAINTENANCE MENU *****
Author/Series Acronyms
Bibtype Codes
Call Number Prefixes
Daily Log Activity Codes
Installation Site Codes
Overdue Messages
Subject Keywords
Title Stopwords
User Affiliation Codes

EXIT
*****
```

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Author/Series Acronym Authority File:

The *Author/Series Acronyms* file contains two fields: an acronym and its expanded value (e.g., the full author name or series title). MicroDIS refers to this file when you are using *DOCUMENT CATALOG* to add, modify or search for catalog database records.

The list has three major purposes: (1) to ensure consistency in the way lengthy author names and series titles are stored and displayed, (2) to allow for brevity when typing an author name or series title, and (3) to help avoid possible frustration during database searching if the exact name of an institutional author or title is not known, or if it is easily misspelled.

For each institutional author/sponsor name (e.g., U.S. Agency for International Development), or each serial title (e.g., Africa Economic Digest), one or more common acronyms may appear in the file. For example:

AED =	Africa Economic Digest.
AID =	U.S. Agency for International Development
CGIAR=	Consultative Group in International Agricultural Research
USAID=	U.S. Agency for International Development

Entry of more than one acronym per institution may be useful if an institutional author is frequently referred to by more than one acronym (e.g., AID, USAID), or if the acronym varies in English/French/Spanish (e.g., CDIE, CIED). In this instance, any of the alternative acronyms can be used during data entry, modification or searching, but MicroDIS will always decode the acronym into the same full name when storing or displaying the record.

When adding, modifying or deleting entries in this authority file, consider the effects on the catalog database. Remember that it is the value of the acronym (the full author name or series title) as defined at the time of data entry which is actually stored in the catalog record, not the acronym itself. Therefore, any time you change the value of an acronym, the associated name/title stored in catalog records will change only in the records entered thereafter.

For example, if the name of an institutional author changes (e.g., from "Upper Volta. Ministry of Finance" to "Burkina Faso. Ministry of Finance"), you cannot globally alter the way that name appears in previously entered database records by simply changing the value of the acronym in the authority file.

Similarly, if you create an acronym for a name or serial title which already appears in one or more records in the catalog database, the name/title will always be decoded and entered consistently in future, but any existing records will continue to show the name or title as it was entered previously, including any inconsistencies or typographical errors. It may thus be useful to browse the *Author/Series Acronym Fast Access File* (using Function Key 2 in either the *DOCUMENT CATALOG* add or search functions) to check for any prior inconsistencies, and then modify any records affected.

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Adding an alternative acronym, or modifying the value (full name/title) for an acronym which already appears in the file pose no problems as the same name/title is stored by either acronym (e.g., AID or USAID).

Finally, before deleting an old acronym, consider whether you need to retain it as a quick way of searching on the former name of an author or series.

#### *Bibtype Codes Authority File*

The *Bibtype Code* file contains two fields: a numeric bibliographic type code and its expanded value. MicroDIS refers to this file when you are using *DOCUMENT CATALOG* add, modify and search functions.

A bibtype code is used identify and retrieve documents of the same logical type. For example, a bibtype list may contain codes designating encyclopedias, annual reports, dissertations, or directories, as well as various types of documentation (conference proceedings, journal articles) and project reports (e.g., design papers, evaluations).

MicroDIS is installed with some codes already loaded into this file. These codes are derived from the list of U.S. Agency for International Development (A.I.D.) official bibtype codes. These bibtypes are used in A.I.D.'s database of agency policy, program and project documentation, called the Development Information System (DIS). All of these codes may not be appropriate for every local collection; the MicroDIS system manager should review the list and decide to accept the codes as is, modify the list, or use a completely new set of bibtypes.

Ideally, a bibtype list could be created once and be applicable to the document database forever. However, changes will certainly be necessary from time to time.

Adding a new bibtype code will not affect the integrity of your catalog database, but you should review and individually modify citations retrieved by any related codes that might better be retrieved by this new code.

Unlike the author/title acronyms, bibtype codes are stored directly in catalog records and are never decoded. You may therefore modify the value (the decoded bibtype name) without concern for affecting data consistency.

Delete codes only after you are sure that no documents are cataloged with that bibtype (check the *Bibtype Fast Access File* via the *DOCUMENT CATALOG* add or search functions) to see if any records contain the bibtype you want to delete. If you try to modify a document using a nonexistent or deleted bibtype code, an error message is displayed.

### Call Number Prefix Authority File

The *Call Number Prefix* file contains two fields: a prefix (major subject class codes) and its expanded value or descriptive name. MicroDIS refers to this file when you are using the *DOCUMENT CATALOG* add, catalog utilities (change site code/call number) and report (new acquisitions) functions.

This file is used by MicroDIS (1) to validate as many characters in the catalog database call number field as are specified in the *Call Number Significant Digits* setting of the *SYSTEM UTILITIES -- CONFIGURE* function, and 2) to create subject headings in the *New Acquisitions Report* for each major subject class. Both of these uses are optional.

To set up either feature:

1. In the MicroDIS *SYSTEMS UTILITIES -- CONFIGURE* utility, type in the number of call number characters (*Call Number Significant Digits*) that should be validated or decoded, up to six characters.
2. Next, for each major subject class, add an entry to the *Call Number Prefix Authority File*. The subject heading that you specify as the "value" is exactly what will print out as the subject heading for all materials beginning with that call number prefix in the *New Acquisitions Report*. These subject headings can be revised at any time without any affect. .pm

If you do not want to use either feature:

1. Set the *Call Number Significant Digits* to zero using the *SYSTEM UTILITIES -- CONFIGURE* function.
2. Leave the *Call Number Prefix Authority File* blank.

### Daily Log Activity Codes Authority File

The *Daily Log Activity Codes* file contains three fields for a one-letter code, an abbreviated activity name (used on reports) and the expanded or full name of the activity. These codes are used in entering and producing the *DAILY LOG* activity reports.

The purpose of the codes is to help information centers keep a statistical record of the level of center activity.

MicroDIS automatically assigns four codes for automatic logging of activities associated with MicroDIS functions. Codes A to D are assigned to acquisitions, circulation, catalog update, and catalog search. The MicroDIS system manager assigns any other codes to other activities, such as routing, clipping services, briefings, etc.

Updates to the activity codes affect future reports. Remember that if you do not clear the file after running a *Daily Log Activity Report*, and then you add a new activity code, the statistics for the new code will reflect a different time period than the statistics for all other codes.

#### Installation Site Codes Authority File

The *Site Codes* file contains three fields: a three-digit numeric site code (which MicroDIS uses internally), an abbreviated site code name (which you use for data entry and retrieval purposes), and the expanded value or full name of the site (which is included for descriptive purposes only). MicroDIS refers to this file in all functions associated with the *DOCUMENT CATALOG*, as well as in the *CIRCULATION* functions.

The list has two main purposes. Primarily, the site code list separates documents in your local collection from any documents that you might import from another collection. Also, the use of codes saves disk storage space. Instead of storing a site name forty characters long, for example, only the three character numeric code is stored with each citation.

MicroDIS is always distributed with the current list of installed sites. In general, there is no need to alter the list locally.

A new entry is required only if you are importing records from a MicroDIS site whose site code was assigned after your list of installed sites was compiled. An updated list of codes is sent with each MicroDIS software upgrade.

Note: If you want to make any changes to the decoded value of your site code, you must exit out of MicroDIS to the C:\> prompt, and then re-enter (log-on) MicroDIS in order to effect the change. You cannot change the 3-digit code, only the translated value which appears on the screens and print-outs (e.g., if you wanted the site code to print out as CAIRO-DIC instead of EG-DIC).

#### Overdue Messages Authority File

The *Overdue Messages* file contains four fields. One contains the overdue notice number (1 for the first notice, 4 for the fourth notice). The remaining three fields hold three lines of text to be printed on the overdue notice. MicroDIS only refers to this file when you use the *CIRCULATION -- REPORTS* function to generate overdue notices. The list may be modified as desired without any concern for data integrity.

#### Subject Keyword Authority File

The *Subject Keyword* file contains two fields: the subject keyword (word or phrase) and a "flag" which indicates whether the keyword is part of a controlled subject vocabulary (a descriptor - flagged with a "Y") or a non-controlled term (identifier - flagged with an "N"). MicroDIS refers to this file during *DOCUMENT CATALOG* add, modify and search operations.

The purpose of the file is to (1) ensure that subject keywords are entered correctly and consistently, and (2) to maintain a "controlled vocabulary" of subject keywords used in catalog searching. Each MicroDIS installation may use any controlled vocabulary of its choice; it is suggested that A.I.D. Mission information centers use either the *USAID Classification Scheme* and/or the *A.I.D. Thesaurus*.

MicroDIS does not come pre-loaded with a controlled vocabulary.

There are two means of adding terms to this authority file. The easiest way is to add terms dynamically as catalog records are entered. For each keyword which does not already appear in the authority file, MicroDIS displays an error message (*NEW KEYWORD OR SPELLING ERROR*) and provides an option to add to or view the authority file. Alternatively, each installation can build and maintain its *Subject Keyword Authority File* through the the *Subject Keyword Authority File UPDATE MENU* (see Section 8.1.2). In either case, it is up to each site to determine whether to add a term as a descriptor or identifier.

When adding new terms to the file, you may want to search for, review and possibly modify records indexed by related keywords. This is especially true for "catchwords" and development topics that come into common use, such as "privatization" or "child survival." There is, however, no means of globally changing previously used keywords to newly added ones (e.g., from "private sector development" to "privatization").

Before deleting keywords from the file, examine the *Subject Keyword Fast Access File* in *CATALOG -- SEARCH* to be sure that no documents use that descriptor or identifier.

#### *Title Stopword Authority File*

The *Title Stopword* file is different from the others in that it contains only one field; the stopword itself. This file is examined by MicroDIS when you are using *DOCUMENT CATALOG* to add, modify or delete a catalog record.

Whenever a document is cataloged, words appearing in the stopword file are not added to the *Title Word Fast Access File*. This eliminates the overhead and wasted space associated with maintaining common words like "and", "of", "et. al." in the file.

As installed, the stopword list contains about common words in English, French and Spanish. In general, the MicroDIS system manager should make any additions to or deletions from the stopword list before a great deal of catalog activity occurs.

Although any word entered as a stopword is likely to be insignificant, and not a word that one would be likely to use to retrieve records, caution is nevertheless needed when modifying the stopword list. When a new stopword is added, references to that word already in the fast access files will remain. This will not cause any errors, but the formerly used word will still appear in fast access file reports. Similarly, removing a stopword can cause inconsistencies. Note that to modify a stopword amounts to both a delete and an add.

### User Affiliation Codes Authority File

The *User Affiliation Codes* file contains three fields: the one letter code, the expanded value, and an abbreviated value. These codes are used when you record a *CIRCULATION* loan, or enter an *ACQUISITIONS* tracking record.

The codes are used by MicroDIS when generating several statistical reports, thereby providing information centers with data on the amount of service provided to various categories of users.

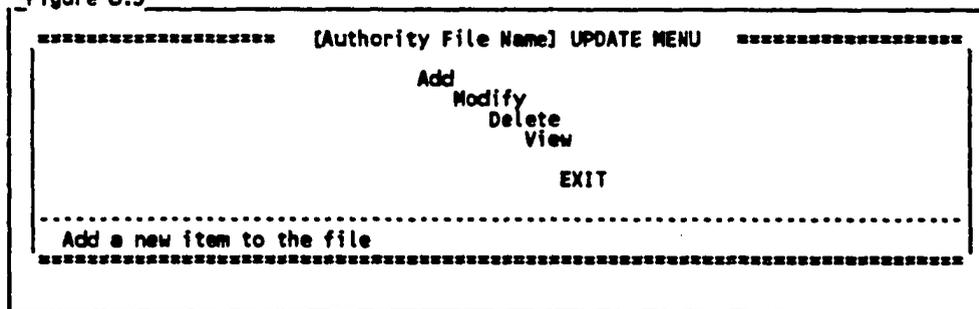
MicroDIS is installed with some sample user affiliation codes. You may elect to use these codes, or develop your own to more accurately match information center user groups.

Maintaining the list is not critical to smooth MicroDIS operation. Changes to the list will not affect MicroDIS day-to-day use.

#### 8.1.2 Selecting a Maintenance Function

For each authority file, the available maintenance functions are the same (Figure 8.3).

Figure 8.3



You may want to *VIEW* the authority file before any updating. Be aware that there is no semantic checking in the data entry screens. Anything you add to or modify in an authority file will be accepted, as long as no duplicate entries are created. Otherwise, the add, modify and delete functions work just like their counterpart functions in the *DOCUMENT CATALOG* module.

After you finish altering the list, *VIEW* it again to be sure that the authority file appears exactly as you need it. As with many MicroDIS reports, authority files can be viewed either on the screen or on the printer.

## 8.2 REBUILD MICRODIS SORT INDEXES

The *REBUILD* utility rebuilds the internal indexes which link each database record to a sort sequence for display or printing. Use this utility in four situations:

- o after any abnormal MicroDIS interruption, e.g. system crash or power failure
- o after restoring the database from the last backup
- o after a sort index file (name ends with .NTX) is accidentally erased or damaged, in order to recreate it
- o after installation, to become comfortable with the procedure.

Doing a rebuild in other situations is not harmful in any way, but it may take time (the exact length of time depends upon the number of records in the various databases in the system).

When you select this utility, MicroDIS displays the *SORT INDEX REBUILDING MENU* (Figure 8.4) to give you a choice of rebuilding some or all sort indexes.

Figure 8.4

```
***** SORT INDEX REBUILDING MENU *****
Document Database
  Authority Files
    Fast Access Files
      Circulation/Acquisitions
        System
          Total Rebuild
            EXIT
-----
Reindex catalog database and related files
-----
```

If you have any doubts about which sort indexes need to be rebuilt, select <T>otal rebuild. Remember, REBUILD cannot harm your data.

### 8.3 CONFIGURE THE SYSTEM

Run *CONFIGURE* at the following times to define certain aspects of your system configuration:

- o at installation, to initially set the parameters
- o when you are changing your hard disk configuration or want to use a RAM disk
- o when you want to change the system access password
- o when you are setting up the *Call Number Prefix Authority File*
- o when you switch between a monochrome and a color monitor.

The *INSTALLATION CONFIGURATION PANEL* appears as follows (Figure 8.5):

Figure 8.5

```
MICRODIS - INSTALLATION CONFIGURATION PANEL
=====
DISK DRIVE ASSIGNMENTS
  FOR PROGRAM: C
  FOR TEXT FILES: C
  FOR DATA FILES: C

SYSTEM ACCESS WORD:
CALL# SIGNIFICANT DIGITS: 0      Valid range is 0 thru 6
TYPE OF MONITOR: M             <M>monochrome or <C>color monitor
DEFAULT LANGUAGE: EN          Valid languages are: <EN> for English
                                   <ES> for Spanish
                                   <FR> for French

Press <F1> for HELP, <F5> to RECONFIGURE, <F9> to EXIT
```

*Drive Assignments* tell MicroDIS where to find classes of files in the system. Most computer systems have only one hard disk and consequently these parameters will all be set to "C". However, if your microcomputer has more than one hard disk drive, you may wish to spread the different types of files across the several drives. This will give faster response time.

*System Access Word* is the password which, if assigned in the configuration panel, must be entered when logging on in order to gain access to all of the functions in MicroDIS. If this password is NOT entered during log-on, MicroDIS restricts users to the *DOCUMENT CATALOG -- SEARCH* function and to the *REFERENCE DESK*. Alternatively, the password may be left blank in the configuration panel, giving all users access to all modules. MicroDIS is loaded from the installation diskettes with the password blank.

*Call Number Significant Digits* is the number of digits at the beginning of the call number which are used for validation and decoding in association with the *Call Number Prefix Authority File*. An entry of zero (0) means that MicroDIS will not use these features. If an entry other than zero is given for this parameter, then the authority file will be accessed during printing of the New Acquisitions report to create subject category headings. In addition, this authority file will be used during data entry to verify that all call numbers entered into the database have valid prefixes. See Section 8.1.1 for more information on using the related *Call Number Prefix Authority File*.

*Monitor* indicates whether you are using a monochrome (single color) or full color monitor.

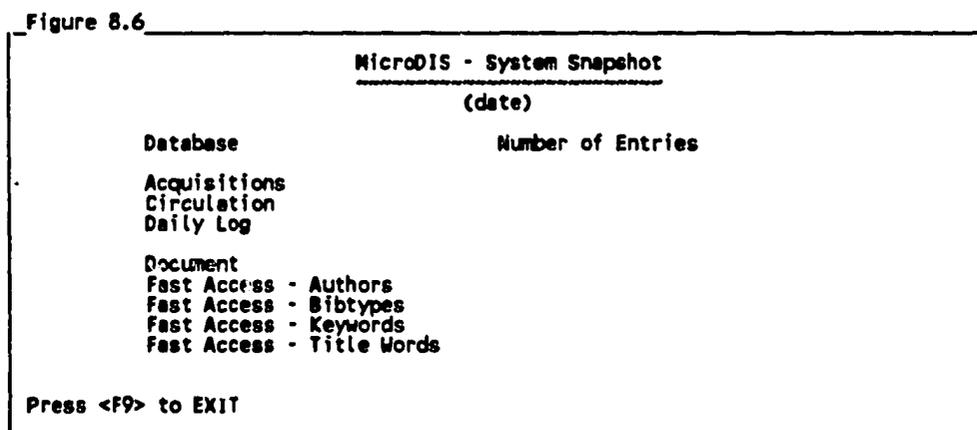
You can always view these settings and then EXIT without any affect.

However, if you do make changes, you must press Function Key 5 (F5) to reconfigure MicroDIS, and then exit completely out of MicroDIS for the changes to take effect. You do not need to power off; just exit back to the C:\> prompt. Then type "microdis" as usual to resume use.

#### 8.4 SYSTEM SNAPSHOT

The *SYSTEM SNAPSHOT* utility provides a quick overview of the number of entries in the MicroDIS databases and fast access files created by each site. It is easy to use; there are no prompts or questions.

When you select this utility, the following screen displays the data for your installation (Figure 8.6).



The values are the number of records contained in each database, or, for the fast access files, the values show the number of entries in each file (e.g., the number of author names, title words, keywords and bibtype codes).

Although this data is only displayed on the screen, you can print the data summary directly from the screen by pressing Shift + the PrtSc (print screen) key (or whatever key combination is used on your keyboard).

You may find it useful to print and retain copies of this data periodically in order to track the growth of your databases and files. In the event of a power failure or system crash, it can also be useful to have a copy of a recent snapshot to get a rough idea if any records or files have been lost.

When finished with the snapshot, MicroDIS then returns to the *SYSTEM UTILITIES MENU* (Figure 8.1).

## **SECTION 9: TECHNICAL REFERENCE**

### **9.0 INTRODUCTION**

This section is intended for use by the MicroDIS system manager and/or technical support personnel. It contains information on the following subjects:

- Error Messages and How to Respond**
- Recovering from Power Failure**
- Database Backup and Restore Procedures**
- Database Definitions and Linkages**
- Fast Access File Definitions and Their Uses**
- Authority File Definitions and Their Uses**
- Using an International Character Set**

### **9.1 ERROR MESSAGES AND HOW TO RESPOND**

Throughout the error handling section, reference is made to the MicroDIS Technical Support Group. They may be contacted through:

**U.S. Agency for International Development  
PPC/CDIE/DI  
Room 209, SA-18  
Washington, D.C. 20523 USA**

**Telephone: (703) 875-4970**

or directly at:

**MicroDIS Technical Support Group  
LTS Corp.  
7222 47th Street  
Chevy Chase, MD 20815 USA**

**Telephone: (301) 951-7191  
Telex: 3730100 LTSCORP  
Fax: (301) 951-9624**

References are also made to the Error Reporting Form, contained in the back of the *GETTING STARTED* section of the MicroDIS Manual. The system manager should keep several copies of the form at hand, so that any problems that occur can be documented as thoroughly as possible.

Error or warning messages may come from any of three sources:

DOS errors  
MicroDIS data errors  
MicroDIS system errors

### 9.1.1 DOS Error Messages

These messages are normally, but not always, encountered outside of MicroDIS.

*<type> error reading/writing <device>  
Abort, Retry, Ignore?*

An error was detected during reading or writing to any of the devices connected to your system, usually a printer or disk drive. <Device> indicates which physical unit is inaccessible, and <type> gives some explanation on the nature of the problem. For example:

*Not ready error writing device PRN  
Abort, Retry, Ignore?*

This message indicates one of several things. It could be that the printer doesn't have paper, is not online, is not attached to the PC, or in general is not accessible due to a physical reason. If you cannot figure out what the error message means, hit R for retry. If the problem persists, contact an individual locally who is familiar with microcomputer systems.

*Bad command or filename*

This means that the computer does not understand the command. First, check the spelling. Any error in the command name will generate this message. If it is spelled correctly, then the command may have been deleted from the PC. Another possibility is that the DOS "path" has been changed. Still one more possibility is that the default drive is not correct. The prompt on the screen should indicate the correct drive (e.g., C:\). Try other commands to determine the nature of the problem.

*Insufficient disk space*

This means that your hard disk or floppy disk is full and cannot hold any more information. Use the DIR command to see what files are on the suspect disk. Can any be removed? Can you use another diskette?

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### 9.1.2 MicroDIS Data Error Messages

Data warning messages are not cause for worry. They only indicate that some other option or value should be entered and that the problem can be corrected by the user. For example, in the *DOCUMENT CATALOG* data entry screens, one field is *bibtype*. The field is checked against the *Bibtype Code Authority File*. If the *bibtype* entered does not appear in the authority file, MicroDIS will give a warning message.

No warning message will stop the system. If you are unable to resolve a MicroDIS warning, complete an Error Report Form and contact the MicroDIS Technical Support Group.

### 9.1.3 MicroDIS System Error Messages

Your first response to any system error should be to write down the message, word for word, or print the screen containing the error message directly using <Shift> + <PrtSc>. Also note what else is on the screen, which module you are running, which records are being accessed, any prior unusual happenings, etc. Only after recording this information should you continue with the error handling guide.

All system errors are displayed in the following format:

proc: \_\_\_\_\_ line: \_\_\_\_\_ description (Q/A/I)

"Proc" is the name of the program that was running when the error occurred.

"Line" is the line number of the statement executing when the error occurred.

"(Q/A/I)" are your options to continue:

- <Q> quits the program after closing all files
- <A> aborts the program without closing files
- <I> ignores the error and continues

Do not choose <A> for abort. It is never the best response. Depending upon the situation, as described below, choose <Q> or <I>.

"Description" may be any of the following:

#### ***System Error***

Indicates an internal problem with MicroDIS. One possible cause is when using a corrupted sort index file. Quit and then run *REBUILD* on the *SYSTEM UTILITIES* menu. If the error occurs again, then it is probably caused by a lack of available memory.

Have you been running MicroDIS day in and day out without this problem before? If so, then try to identify what is different about the PC today. Is there a new version of DOS, the Disk Operating System, loaded up now? Find out if any memory resident programs are being used on the PC.

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If you still cannot correct the problem, then perform the following steps. These instructions assume that the hard disk is referenced as drive C.

At the C:\> DOS prompt, type CHKDSK and make a note of the number of "bytes free" at the bottom.

Next type CD C:\MICRODIS to move to the microdis subdirectory.

Then type DIR MICRODIS.EXE and make a note of the size of the microdis executable module.

Next type DIR \*.OVL and make a note of the largest of the dozen or so overlay files.

Add up the size of the executable module and the largest overlay file. To this figure add 64K (65536 bytes). This is the minimum amount of memory that MicroDIS needs to run. Compare this value to the number of "bytes free" from CHKDSK.

If the amount of memory needed is less than the amount of memory available, then fill out an error report form completely and contact the MicroDIS Technical Support Group immediately.

If there is not enough memory, then the amount must be increased. First, remove any unnecessary memory resident utilities. If that is not enough, then you will need to buy more memory (RAM). It is a good idea to have 640K on a PC running MicroDIS, even though it is possible to have less.

#### **DOS Error #**

The # symbol can be any number from 1 to 83. The most common error numbers are:

**# = 2 (file not found)** The name of the file MicroDIS needs, but cannot find, will be shown. If it is a sort index (.NTX), then Quit and do a *REBUILD*. Otherwise, you will need to restore the file from your backup. See the section on Backup/Restore elsewhere in the Technical Reference section. Be especially careful when restoring a database (.DBF) file. Follow the restore instructions!

**# = 4 (too many files open)** This error can be a result of two situations. The most common is when the CONFIG.SYS file is not yet setup, is damaged, or has been erased. The CONFIG.SYS file must say FILES=20 in order to accommodate MicroDIS on your machine. See the installation guide for details. If the PC configuration is okay, then fill out an Error Report Form and contact the MicroDIS technical support group.

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# = 15 (invalid drive specified) Run the *CONFIGURE* utility to be sure that the disk drive specifications are set to the hard disk (usually C).

# = 19 (write protect violation) The diskette you are writing to has a write protect. Either remove the write protect tab or use a different diskette. Then select I to ignore the error and MicroDIS will proceed normally.

# = 21, 29, or 30 (drive not ready) Verify that the diskette drive door is closed and that the diskette is inserted properly. Then select I to ignore the error. If the message appears again, you may have a damaged diskette. Try another diskette.

# = 28 (printer out of paper) Make sure that the printer has paper, that the power is on, that it is online, and that the printer cable is attached securely to both the printer and to the PC. Then select I to ignore the error.

If any other DOS error message occurs or if you are unable to resolve any of the above error messages, complete an Error Report Form and contact the MicroDIS technical support group.

#### *Database error*

The requested database has been corrupted. You will need to restore the database from your backup. Make a note of the name of the database file and then see the instructions on Backup/Restore in this section.

#### *Type Conflict* *Undefined Symbol Error* *MACRO Error*

Any of these messages indicate an internal MicroDIS problem. It could happen if one of the program files (.EXE and .OVL files) is damaged. Restore the software from your backup and try again. If the problem persists, then the software is in error. Complete an Error Report Form and contact the MicroDIS technical support group.

## 9.2 RECOVERING FROM POWER FAILURE

Any power failure has the potential to damage MicroDIS data files, but most of the time there will be no problem. Follow these steps in the event of any power interruption.

First, turn off the PC. This prevents any subsequent power surges from damaging the machine.

While it is still clear in your mind, recall what was happening in MicroDIS at the time power was stopped. Were you on a menu? Data entry screen? Printing a report? Whatever it was, write down the name of the module in use, document being modified, etc.

After electricity comes on again, turn on the PC. If it does not start up properly, then there may be hardware damage due to a surge or spike. Turn off the PC and then try again after a few minutes. If it still does not work, then it will have to be serviced. After any hardware problems have been resolved, continue with the rest of these steps.

When the machine has booted up, type CHKDSK. This utility looks at everything on the hard disk and identifies any damaged areas or lost data clusters. If CHKDSK does find errors, then contact a local knowledgeable individual or the MicroDIS technical support group before doing anything else with the PC.

If CHKDSK found no errors, it is likely that no information was lost. Now, think back to what was happening before the power was interrupted.

If you were outside of MicroDIS or on a MicroDIS menu, then everything is okay. There is no potential for data loss and you may continue work without worries. This implies a good rule of thumb for sites prone to power interruptions; when you are finished using MicroDIS for any length of time, make sure it is on a menu. That minimizes the chances of database damage.

If you were on a data entry or modify screen, then that record will have to be entered or modified again. Your only loss is a few minutes of work.

**BUT - if MicroDIS was actively updating databases then there may be damage. Interruptions during the time that MicroDIS is creating a document record and updating fast access files WILL harm data integrity. A database restore will be required -- see the backup and restore instructions below.**

## 9.3 DATA BACKUP AND RESTORE PROCEDURES

### 9.3.1 Introduction

There is no substitute for periodic data backups. In the event of fire, electrical spike, or other catastrophe, all your information could be lost. Without a backup, your MicroDIS installation would have to start over from scratch. Another cause of data loss is accidental erasure. When you have a backup, the loss of one file is merely a nuisance. Without a backup, your MicroDIS installation could be disabled for a few weeks while you wait for the necessary files to be shipped from A.I.D. Even then, you may have lost tremendous amounts of information.

There are four considerations in any backup scheme: the scope, frequency, media used, and restore methodology.

### 9.3.2 Scope

At a minimum, MicroDIS uses over 100 data files. Some sites will have as many as 200 files, depending upon the implementation. If data is going to be backed up daily or weekly, the procedure could be much quicker if only the active or important files are backed up. If a file is on the PC hard disk but is not being used, then there is no need to protect it with more than one backup.

Below is a typical file list for a MicroDIS site (this list was taken from the demonstration version of MicroDIS).

ACQUISIT DBF	ANCILARY DBF	ATHORITY DBF	AXACRONM DBF	AXACTIVE DBF
AXAFFIL DBF	AXBIBTYP DBF	AXCALLNO DBF	AXCMG DBF	AXSITE DBF
AXSTOP DBF	AXTHESAR DBF	BIBLIST DBF	CDIEPUBS DBF	CIRCULAT DBF
CURRENT DBF	DAILYLOG DBF	DELLIST DBF	DOCUMENT DBF	DOWNLOAD DBF
EXPORT DBF	FXAUTHOR DBF	FXBIBTYP DBF	FXDESC DBF	FXTITLE DBF
HELP1 DBF	HELP2 DBF	HOLDER DBF	NEW DBF	OLD DBF
OTHERSRC DBF	P01DIR DBF	P02DIR DBF	PMRG DBF	RESULTS DBF
RXCIRCUS DBF	SXCONFIG DBF	TITLSRT DBF	TTLWORDS DBF	CDIE01 DSP
CDIE02 DSP	CDIE03 DSP	CDIE04 DSP	CDIE05 DSP	CDIE06 DSP
CDIE07 DSP	CDIE08 DSP	CDIE09 DSP	CDIE10 DSP	CDIE11 DSP
CDIE12 DSP	CDIE13 DSP	CDIE14 DSP	CDIE15 DSP	CDIE16 DSP
CDIE17 DSP	CDIE18 DSP	CDIE19 DSP	CDIE20 DSP	NEWS DSP
OTHER01 DSP	OTHER02 DSP	OTHER03 DSP	OTHER04 DSP	OTHER06 DSP
OTHER07 DSP	OTHER08 DSP	OTHER10 DSP	OTHER11 DSP	OTHER12 DSP
OTHER13 DSP	P01C01 DSP	P01C02 DSP	P01C03 DSP	P01C04 DSP
P01C05 DSP	P01C06 DSP	P01C07 DSP	P01C08 DSP	P01C09 DSP
P01C10 DSP	P01C11 DSP	P01C12 DSP	P01C13 DSP	P02C01 DSP
P02C02 DSP	P02C03 DSP	P02C04 DSP	P02C05 DSP	P02C06 DSP
P02C07 DSP	P02C08 DSP	P02C09 DSP	P02C10 DSP	P02C11 DSP
P02C12 DSP	P02C14 DSP	P02C15 DSP	P02C16 DSP	P02C17 DSP

P02C18	DSP	P02C20	DSP	P02C21	DSP	P02C22	DSP	P02C23	DSP
P02C24	DSP	P02C25	DSP	P02C26	DSP	P02C27	DSP	P02C28	DSP
P02C29	DSP	P02C30	DSP	P02C31	DSP	P02C32	DSP	P02C33	DSP
MICRODIS	EXE	ACQ1	NTX	ACQ2	NTX	ACQ3	NTX	ACQ99	NTX
ACTEMP	NTX	ANCILARY	NTX	ATHORITY	NTX	AXACRONM	NTX	AXACTIVE	NTX
AXAFFIL	NTX	AXBIBTYP	NTX	AXCALLNO	NTX	AXMSG	NTX	AXSITE	NTX
AXSITE2	NTX	AXSTOP	NTX	AXTHESAR	NTX	BIBLIST	NTX	CDIEPUBS	NTX
CIRC1	NTX	CIRC2	NTX	CURRENT	NTX	DOC2	NTX	DOCUMENT	NTX
FXAUTHOR	NTX	FXBIBTYP	NTX	FXDESC	NTX	FXDESC2	NTX	FXTITLE	NTX
HELP1	NTX	HELP2	NTX	HOLDER	NTX	LOG	NTX	NEW	NTX
OLD	NTX	OTHERSRC	NTX	POIDIR	NTX	PO2DIR	NTX	PMRG	NTX
RESULTS	NTX	RXCIRCUS	NTX	SXCONFIG	NTX	TITLSRT	NTX	TTLWORDS	NTX
ACQUISIT	OVL	CIRCULAT	OVL	DADD	OVL	DDELETE	OVL	DMODIFY	OVL
DREPORT	OVL	DSEARCH	OVL	DUTILITY	OVL	LOGDAILY	OVL	REFDESK	OVL
UTILITY	OVL								

Of all these 150+ data files, which are most active? Which need to be backed up once, and which need to be backed up regularly? If you have a very fast backup medium and do not mind backing up the whole set of files, then by all means do so. The following discussion is aimed at users who wish to backup only critical portions of their system.

There are four types of files in MicroDIS, each with different backup considerations. They include database and fast access files (.DBF), sort indexes (.NTX), display files (.DSP), and program files (.EXE and .OVL).

MicroDIS has about 40 database files (.DBF). They are among the most active files in your installation. Every time a new document is cataloged, for example, the contents of up to eight database files are altered. For this reason, CDIE recommends regular backup of all database files.

The sort indexes (.NTX), link each database record to a sort sequence for display/printing. In general, every time a database file changes, one sort index is updated. One might therefore expect it necessary to backup sort indexes as well, but that is not the case. All sort indexes can be recreated from scratch with the *REBUILD* function on the *SYSTEM UTILITIES* menu.

For example, suppose the CIRCULAT.DBF database is accidentally erased. If you load it in from a backup, then the existing CIRC1.NTX and CIRC2.NTX sort indexes will be out of sync with the CIRCULAT database itself. But by running *REBUILD*, the sort indexes will be recreated to reflect the current contents of the circulation database. Despite their activity, the sort indexes do not need periodic backup.

Your site will also have between 1 and over 200 display (.DSP) files. They are used in the *REFERENCE DESK* module of MicroDIS. If your site does not use this module, then there is no need to back up these files. If your site does use the module, then it should be backed up once, after MicroDIS is installed. Because the display files do not change, backing them up more than once is not required.

Similarly, the dozen or so program files (.EXE and .OVL) do not change over time. Backup these files once, just after installation.

Again, the above discussion applies to you only if backup time or data volume is a consideration. If regularly backing up the entire system is not a problem, then go ahead and do that.

### 9.3.3 Frequency

The next question is "How often should I backup volatile data?". The response is "How much work are you willing to redo after a data loss?" If your site catalogs five records a day, then backing up once a week should be reasonable. More active sites should perform backups more often, perhaps semiweekly or every other day. Backup as often as you feel necessary.

### 9.3.4 Media

The simplest way to backup the system is to use the DOS backup command. This will require three diskettes for each megabyte (MB) of data. This backup procedure is time consuming and requires someone to be present to change the diskettes in the computer as they fill with data.

A diskette-based backup method is recommended in two instances. For one-time backups like the program files or display files, it is quick and involves no additional expense. For periodic backups, use it only for the database files. The number of diskettes required for a periodic backup of the entire system is too great to use it regularly.

Alternatively, tape cartridge backup offers speed, reliability, and ease of use, although it requires additional expenditure for the hardware. Tape systems are available for both Wang and IBM microcomputers. If your site select this method, it is recommended that you backup the entire set of MicroDIS files. Normally one tape cartridge has enough capacity to hold a complete MicroDIS system.

Using a "parent" computer for backup is another alternative. If your site has a minicomputer or mainframe (e.g., a Wang VS), you may be able to periodically upload data from the PC to the larger machine. This method has the advantage of safety; most larger computers have a satisfactory backup scheme. Some initial expenditure may be needed for the communications software or hardware. When backing up to a parent machine copy the entire MicroDIS system, as you save little time by selecting certain files.

### 9.3.5 Restoring

There are two types of restores: comprehensive and selective. A comprehensive restore is used after some catastrophe that erases all your data. Reload everything you have on backup disks/tapes onto the hard disk and then continue to use MicroDIS normally.

A selective restore may only be needed if, after consulting the Technical Reference section or MicroDIS Technical Support Personnel, you determine that only one or a few files are damaged. Even when only one file is corrupted, however, you may need to restore a cluster of related files to ensure data integrity. For display files or program files, just restore the one or a few files that you know are damaged or missing. For sort indexes, no restore is necessary; just run *REBUILD*. For database files, a careful restore is needed due to logical links between different database files.

The following database files all stand alone. They may be restored individually as needed:

ACQUISIT DBF	ATHORITY DBF	AXACRONM DBF	AXACTIVE DBF	AXAFFIL DBF
AXBIBTYP DBF	AXCALLNO DBF	AXCMMSG DBF	AXSITE DBF	AXSTOP DBF
AXTHESAR DBF	CDIEPUBS DBF	CIRCULAT DBF	CURRENT DBF	DAILYLOG DBF
DELLIST DBF	DOWNLOAD DBF	EXPORT DBF	HELP1 DBF	HELP2 DBF
HOLDER DBF	NEW DBF	OLD DBF	OTHERSRC DBF	PO1DIR DBF
PO2DIR DBF	PMRG DBF	RESULTS DBF	RXCIRCUS DBF	TITLSRT DBF
TTLWORDS DBF				

Unless a MicroDIS technical support person tells you otherwise, restoring any one of the following files requires that you restore all the database files in this cluster:

ANCILARY DBF	BIBLIST DBF	DOCUMENT DBF	FXAUTHOR DBF	FXBIBTYP DBF
FXDESC DBF	FXTITLE DBF	SXCONFIG DBF		

After completing any selective database file restore, running *REBUILD* is mandatory. The table below shows, for each option on the rebuild menu, which databases will have their sort indexes recreated. When in doubt, rebuild all the sort indexes. It may be time consuming but cannot damage your data.

#### Document database

ANCILARY DBF	BIBLIST DBF	CURRENT DBF	DOCUMENT DBF
HOLDER DBF	NEW DBF	OLD DBF	RESULTS DBF
TTLWORDS DBF			

#### Authority files

ATHORITY DBF	AXACRONM DBF	AXACTIVE DBF	AXAFFIL DBF
AXBIBTYP DBF	AXCALLNO DBF	AXCMMSG DBF	AXSITE DBF
AXSTOP DBF	AXTHESAR DBF		

#### Fast access files

FXAUTHOR DBF	FXBIBTYP DBF	FXDESC DBF	FXTITLE DBF
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## Acquisitions

ACQUISIT DBF

## Circulation

CIRCULAT DBF

RXCIRCUS DBF

## System

CDIEPUBS DBF  
OTHERSRC DBF  
SXCONFIG DBF

DAILYLOG DBF  
PO1DIR DBF

HELP1 DBF  
PO2DIR DBF

HELP2 DBF  
PMRG DBF

No rebuild is needed for the following databases:

DELLIST DBF

DOWNLOAD DBF

EXPORT DBF

TITLSRT DBF

## 9.4 DATABASE DEFINITIONS AND LINKAGES

### 9.4.1 Database Definitions

#### DOCUMENT DATABASE (document.dbf)

<i>FIELD NAME</i>	<i>TYPE</i>	<i>WIDTH</i>	<i>DESCRIPTION</i>
isn	character	5	internal sequence number (auto)
printflag	numeric	1	print status of citation (auto)
circ_count	numeric	2	counter of time document loaned (auto)
sitecode	character	3	information center designation (auto)
callnumber	character	25	document call number
copies	character	1	number of copies
location	character	10	physical location of document
format	character	2	physical format of document
bibtype	character	2	AID bibliographic type code
doctitle	character	250	title of document
# sectitle	character	250	second title of document
series	character	70	title of series
seriesnum	character	8	number within series
author1	character	77	first author name
author2	character	77	second author name
author3	character	77	third author name
author4	character	77	fourth author name
author5	character	77	fifth author name
pubdate	character	5	document publication date
pagination	character	25	pages in document
languages	character	2x2	language code for document
# notes	character	2x250	notes / short abstract
datecomp	date	8	date citation placed on database (auto)
descriptor	character	10x40	controlled subject terms
identifier	character	10x40	non-controlled subject terms

Fields which have the designation "(auto)" are automatically maintained by MicroDIS.

#### ANCILLARY DATABASE (ancillary.dbf)

<i>FIELD NAME</i>	<i>TYPE</i>	<i>WIDTH</i>	<i>DESCRIPTION</i>
isn	character	5	internal sequence number (auto)
record_id	character	1	identifies which field is stored
anc_data	character	250	data being saved

**\*\* CIRCULATION DATABASE (circulat.dbf)**

<i>FIELD NAME</i>	<i>TYPE</i>	<i>WIDTH</i>	<i>DESCRIPTION</i>
sitecode	character	3	information center designation (coded)
callnumber	character	25	document call number
copy	character	1	number of copy loaned
name	character	30	name of patron borrowing document
affiliate	character	1	patron's affiliation
office	character	15	patron's office designation
address	character	30	mailing address of patron's office
phone	character	8	patron's telephone number
date	date	8	date document placed on loan (auto)
term	numeric	2	length of document loan
title	character	250	title of document loaned
od_counter	numeric	1	number of overdue notices sent (auto)

Fields which have the designation "(auto)" are automatically maintained by MicroDIS.

**\*\* ACQUISITION DATABASE (acquisit.dbf)**

<i>FIELD NAME</i>	<i>TYPE</i>	<i>WIDTH</i>	<i>DESCRIPTION</i>
orderdate	character	8	date order placed
ponumber	character	15	purchase order number
itemnumber	character	2	line item number
title	character	250	title of item being ordered
publisher	character	30	publisher of item
vendor	character	30	jobber with whom po placed
quantity	numeric	2	quantity of this item ordered
unitcost	numeric	8	unit cost of item (2 decimals)
funding	character	15	funding source for purchase
duedate	date	8	date item due
acqdate	date	8	date item received
disdate	date	8	date item shelved or order cancelled
name	character	30	name of patron requesting order
office	character	15	patron's office designation
affiliate	character	1	patron's affiliation
phonenumber	character	8	patron's telephone number

**DAILY LOG DATABASE (dailylog.dbf)**

<i>FIELD NAME</i>	<i>TYPE</i>	<i>WIDTH</i>	<i>DESCRIPTION</i>
affiliate	character	1	affiliation of patron requesting service
office	character	15	office of patron requesting service
service	character	1	service patron requested
volume	numeric	5	volume of service performed
date	date	8	date log entry made (auto)

Fields with the designation "(auto)" are automatically maintained by MicroDIS.

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## SYSTEM CONFIGURATION DATABASE (sxconfig.dbf)

<i>FIELD NAME</i>	<i>TYPE</i>	<i>WIDTH</i>	<i>DESCRIPTION</i>
con_key	character	2	number which identifies system parameter
con_value	character	5	value of parameter
con_desc	character	22	description of system parameter

### 9.4.2 Database Linkages

Of the six databases described above, two are stand-alone files. That is, they do not share any data and therefore are not linked in any way to the other three. They are the DAILY LOG and the ACQUISITION databases.

When a new record is added to the DOCUMENT (catalog) database, MicroDIS creates two indexes to identify it. The first index is the combination sitecode and call number assigned by the cataloger. The second index is the isn (internal sequence number) which is generated by MicroDIS. This number is transparent to the user and is assigned sequentially. The last document isn assigned is kept in the SXCONFIG database.

The DOCUMENT and the ANCILLARY databases are linked via the 'isn' field.

The DOCUMENT database is the primary repository for the bibliographic information contained in MicroDIS. The ANCILLARY file holds specific fields of information which are not always entered for each citation. These fields are designated by a '#' in the DOCUMENT database definition above. When these fields are entered, MicroDIS uses the isn assigned to the DOCUMENT record and creates an ANCILLARY file record. MicroDIS also assigns a record\_id to identify what information is being stored in the anc\_data field.

The DOCUMENT and the CIRCULATION database are linked via the sitecode and callnumber index. Whenever a document is to be circulated, MicroDIS uses this index to retrieve information from the DOCUMENT database to verify that the document identification provided is indeed the document to be checked out. In turn, during the document search procedure, MicroDIS checks the CIRCULATION database to determine if a document identified by the search is checked out.

The SXCONFIG database is read at the start of a MicroDIS session and the system parameters it contains are used to set global variables which govern the operation of MicroDIS. Two of the variables contained on this database are the last document isn and last descriptor isn assigned by the system. This field is updated on the SXCONFIG database each time an isn is assigned.

**Note:** Work in the DOCUMENT, CIRCULATION, or ACQUISITION database results in automatic generation of an activity record in the DAILY LOG database.

## 9.5 FAST ACCESS FILE DEFINITIONS AND THEIR USES

### 9.5.1 Fast Access File Definitions

#### AUTHOR FAST ACCESS FILE (fxauthor.dbf)

<i>FIELD NAME</i>	<i>TYPE</i>	<i>WIDTH</i>	<i>DESCRIPTION</i>
faa_name	character	77	author name
faa_cont	character	3	record number for this author
faa_ids	character	50	isn's of documents with this author

#### BIB TYPE FAST ACCESS FILE (fxbibtyp.dbf)

<i>FIELD NAME</i>	<i>TYPE</i>	<i>WIDTH</i>	<i>DESCRIPTION</i>
fab_name	character	2	bibliographic type code
fab_cont	character	3	record number for this code
fab_ids	character	50	isn's of documents with this code

#### KEYWORD FAST ACCESS FILE (fxdesc.dbf)

<i>FIELD NAME</i>	<i>TYPE</i>	<i>WIDTH</i>	<i>DESCRIPTION</i>
fad_name	character	40	descriptor/identifier
fad_cont	character	3	record number for this keyword
fad_ids	character	50	isn's of documents with this keyword
fad_isn	character	5	isn for this keyword

#### TITLE WORD FAST ACCESS FILE (fxtitle.dbf)

<i>FIELD NAME</i>	<i>TYPE</i>	<i>WIDTH</i>	<i>DESCRIPTION</i>
fat_name	character	20	title word
fat_cont	character	3	record number for this title word
fat_ids	character	50	isn's of documents with this word

As you can see, all of the fast access files have the same basic construction. (The keyword fast access file is slightly different and that will be explained in a later paragraph.) There are three fields in each file which have identical purposes.

The name field identifies the specific author, bibtype, keyword, or title word which is being indexed. The field length differs in each file for the name field.

The cont field identifies which record (in sequence) this index record is for the specified term. There may be up to 999 records on the fast access files for each term being indexed.

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The ids field contains up to 10 isn's which identify specific records in the DOCUMENT database. As there may be up to 999 records for each term; each term may refer to 9,990 records in the document catalog.

### **9.5.2 Fast Access File Uses**

The fast access files are used in the following manner. When a record is added to the document catalog (or when an existing record is modified), MicroDIS isolates the following data from the citation:

1. all author names;
2. the bibliographic type code;
3. each individual word used in the title, second title, and series title; and
4. each descriptor or identifier.

References (document isn's) are then added to the appropriate fast access file. MicroDIS does this by first checking to determine if the term has already been used. If it has, then the isn for the document record (assigned by MicroDIS automatically) is added to the first available record in the fast access file for that term. If the term has not been used or if there is no available space on an existing record, MicroDIS creates a new record with the cont field set to 1 greater than the last record for the term. In the case of a brand new term, the cont field is set to 1.

In the case of the title words, MicroDIS adds one additional step. Before the reference for each title word is added to the fast access file, it is verified against the *Title Stopword Authority File*. If the title word is listed in the STOPWORD file, then it is not added to the fast access file.

The fourth field in the keyword fast access file is the keyword's isn. Whenever a new descriptor/identifier is added to the fast access file, MicroDIS automatically assigns a unique isn to the keyword. This isn is then placed in the catalog record in the descriptor or identifier field of the DOCUMENT database. This is done in order to conserve storage space on the computer's fixed disk.

## 9.6 AUTHORITY FILE DEFINITIONS & THEIR USES

### 9.6.1 Authority File Definitions

#### AUTHOR/SERIAL TITLE AUTHORITY FILE (axacronm.dbf)

<i>FIELD NAME</i>	<i>TYPE</i>	<i>WIDTH</i>	<i>DESCRIPTION</i>
acr_code	character	10	acronym
acr_descr	character	70	description of acronym

#### ACTIVITY CODE AUTHORITY FILE (axactive.dbf)

<i>FIELD NAME</i>	<i>TYPE</i>	<i>WIDTH</i>	<i>DESCRIPTION</i>
act_code	character	1	activity code
act_descr	character	12	description of activity
act_abbr	character	5	abbreviation of activity description

#### AFFILIATION CODE AUTHORITY FILE (axaffil.dbf)

<i>FIELD NAME</i>	<i>TYPE</i>	<i>WIDTH</i>	<i>DESCRIPTION</i>
aff_code	character	1	user affiliation code
aff_value	character	25	description of affiliation code
aff_abbr	character	10	abbreviation of affiliation description

#### BIBLIOGRAPHIC TYPE CODE AUTHORITY FILE (axbibtye.dbf)

<i>FIELD NAME</i>	<i>TYPE</i>	<i>WIDTH</i>	<i>DESCRIPTION</i>
bib_code	character	2	bibliographic type code
bib_descr	character	40	description of bib type code

#### CALL NUMBER PREFIX AUTHORITY FILE (axcallno.dbf)

<i>FIELD NAME</i>	<i>TYPE</i>	<i>WIDTH</i>	<i>DESCRIPTION</i>
call_code	character	6	call number prefix code
call_value	character	40	description of call number prefix

### CIRCULATION OVERDUE MESSAGES AUTHORITY FILE (axcmsg.dbf)

<i>FIELD NAME</i>	<i>TYPE</i>	<i>WIDTH</i>	<i>DESCRIPTION</i>
msg_num	character	1	circulation message number
msg_line1	character	65	line 1 of message
msg_line2	character	65	line 2 of message
msg_line3	character	65	line 3 of message

### SITE CODE AUTHORITY FILE (axsite.dbf)

<i>FIELD NAME</i>	<i>TYPE</i>	<i>WIDTH</i>	<i>DESCRIPTION</i>
sitecode	character	3	MicroDIS site code
shortname	character	10	abbreviation for MicroDIS site
longname	character	40	definition of MicroDIS site

### STOPWORD AUTHORITY FILE (axstop.dbf)

<i>FIELD NAME</i>	<i>TYPE</i>	<i>WIDTH</i>	<i>DESCRIPTION</i>
stop_word	character	20	stopword for title index

### KEYWORD AUTHORITY FILE (axthesar.dbf)

<i>FIELD NAME</i>	<i>TYPE</i>	<i>WIDTH</i>	<i>DESCRIPTION</i>
the_term	character	40	valid keyword term
the_source	character	1	descriptor or identifier flag

#### 9.6.2 Authority File Uses

All of the above files are authority files. They all serve the same purpose; that is, they ensure that information entered into the various MicroDIS databases meet specific edit requirements. Certain authority files also serve additional functions.

The following authority files are used by MicroDIS during data entry and data modification in the DOCUMENT database to ensure the validity of the data:

AXACRONM      AXBIBTYP      AXCALLNO      AXSITE      AXTHESAR

In addition, the AXSITE and the AXCALLNO files are checked during execution of the recatalog utility to verify that the new call number is valid.

If an acronym is entered for either the 'serial title' or 'author' field this file is checked. If the acronym is valid, it is then expanded and placed in the database.

After all information has been verified and the citation is being added to the database, MicroDIS creates the fast access files. The title, second title, and serial title fields are evaluated and each word is verified against the AXSTOP authority file. If the word exists on this file, it is not indexed.

When using the search function it is possible to enter an acronym during an author search. If the acronym is entered, the AXACRONM file is checked to see if it is valid. If it is, the acronym will be expanded and the search will proceed. Also in the search function, if a call number search is attempted, the AXSITE file is queried to verify that the correct site code is provided.

When producing reports from the DOCUMENT database, the following authority files are accessed to provide specific textual information based on the contents of the citation being printed:

AXBIBTYP            AXCALLNO            AXTHESAR

The following authority files are used by MicroDIS during data entry and data modification in the ACQUISIT, CIRCULAT, AND DAILYLOG databases to ensure the validity of the data:

AXACTIVE            AXAFFIL

Lastly, the AXCMMSG file is accessed when overdue notices are being produced by the circulation module. Depending on which notice is being produced, MicroDIS will print the messages contained in this file. Strictly speaking, this is not an authority file.

## 9.7 USING AN INTERNATIONAL CHARACTER SET

When using MicroDIS to enter bibliographic information in a language other than English, you will need to be able to create individual characters with diacritics (e.g., é or ñ).

Depending upon the intended use of your data, you may first want to determine whether you will be able to reproduce characters with diacritics on your printer. Most printers which are used with microcomputers will support an international character set. However, it may be necessary to reset certain switches on the printer. Refer to the operations manual for your printer to determine if it supports an international character set and, if so, what you need to do to implement that capability.

There are several ways to input characters with diacritics. Perhaps the easiest way is to use the keyboard overlay capability provided by DOS (the operating system). By executing the "KEYBRxx" command you can reconfigure your computer to support the desired characters (replace the "xx" with either "FR" for French-language characters or "SP" for Spanish-language characters). If your computer does not have a Spanish- or French-language keyboard, you will have to then test each key to identify which character it now produces. The above command can also be executed automatically whenever the system is turned on by placing it in the AUTOEXEC.BAT file. Refer to your DOS manual for a more complete explanation of how this command works.

An alternative method for entry of characters with diacritics is to use the standard ASCII code table. This table (see example below) lists 3-digit codes for each character. To input a letter with diacritics first depress the ALT key, and then with the key still depressed type in the appropriate 3-digit code (e.g., ALT + 130 produces the letter é). Use the numeric keypad, not the numbered keys on the top row of the keyboard, when entering the 3-digit code.

### ASCII CHARACTER SET

ASCII Value	Character	ASCII Value	Character
128	Ç	151	ù
129	Û	152	ÿ
130	é	153	Ö
131	â	154	Û
132	ã	155	ç
133	à	156	£
134	á	157	¥
135	ç	158	ƒ
136	e	159	f
137	ë	160	á
138	è	161	í
139	ï	162	ó
140	í	163	ú
141	ì	164	ñ
142	Ä	165	Ñ
143	Å	166	ä
144	É	167	æ
145	æ	168	¿
146	Æ		
147	ó		
148	ö		
149	ò		
150	ó		

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