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1. What is Aleph?

- ALEPH (Automated Library Expandable Program) 500 is an integrated library system that manages both staff and patron access to library catalog information.
- ALEPH was created by the Israeli company Ex Libris. For more information visit Ex Libris’ website: http://www.exlibrisgroup.com/.
- Local library users of Aleph include Boston College, Brandeis University, and Massachusetts Institute of Technology.
- Harvard is currently using Version 20 of Aleph.

2. Aleph Client Information and Log in Instructions

2.1 The Aleph Client

The ALEPH Client is the software installed on each workstation that allows the computer to interact with the server where the Harvard data and ALEPH automation system software reside. Staff use the client to access various functional areas – circulation, acquisitions, cataloging, etc. Aleph calls these functional areas "modules".

2.1.1 Installing the Aleph Desktop Client

- When Harvard implements a new version of Aleph or upgrades an existing version, a new client is installed on each desktop.
- Prior to installation, the new version of Aleph is sent to the Harvard Library Office for Information Systems (OIS) for testing and configuration.
- Once the new version is approved, the client is distributed to each library’s IT department who install the client on each staff computer.

2.2 Access Aleph from Start/Programs Menu

To open the Aleph client:
1. Click the Start button, choose Programs>Aleph 500 Version 20 menu from the Programs list
2. Highlight a module and click on it
3. Enter your Aleph username and password, and click the OK button or hit the <Enter> key

Aleph User Name and Password Dialog Box

Revised: June 3, 2011
2.3 Desktop Icons for Aleph Modules

Follow these instructions to create a desktop icon for Aleph:

2. Highlight a module from the Aleph 20 menu.
3. Right click with the mouse and choose “Create Shortcut” from the menu. Then drag the shortcut from the Start Menu to your desktop.
4. Rename the icon by right-clicking once on the icon name and typing in another name:

   [Image: Cataloging Icon on Desktop]

5. Double click on the icon to bring up the Aleph User Name and Password Dialog box.

2.4 Aleph Passwords

- Each Aleph user must acquire a user name and password to access Aleph.
- Every library unit has an Aleph Liaison who is in charge of requesting new Aleph logins and changes to existing logins. For security purposes, OIS can only distribute Aleph usernames and passwords to Aleph Liaisons.
- The login request form can be found at: http://hul.harvard.edu/ois/systems/aleph/loginrequest.pdf.
- Change the password after logging in for the first time.

2.5 Password Length and Formation

- Passwords in Aleph can be between 4-10 characters.
- Harvard University auditors recommend that passwords be between 6-8 characters and use a combination of letters and numbers.
- It is also recommended that passwords be changed every six months or so, especially if staff share workstations or work on multiple workstations.

2.6 How to change your password

1. Right click on the Key icon located on the bottom right corner of the screen. This key icon appears in every module in the Aleph Client. The following menu options will appear:

<table>
<thead>
<tr>
<th>Profile: default - user: TRAIN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Login as Another User</td>
</tr>
<tr>
<td>Change Current Password</td>
</tr>
<tr>
<td>Temporary Password Override</td>
</tr>
<tr>
<td>Staff Privileges</td>
</tr>
<tr>
<td>Set Workstation Identifier</td>
</tr>
</tbody>
</table>

   [Image: Password Menu Options]

2. To change the password, click on change current password.

Revised: June 3, 2011
3. The change password dialog box will appear:

![Change Current Password Dialog Box](image)

4. Input the old password.
5. Enter a new password.
6. Reenter the new password.
7. Click the OK button.

Note: Aleph will not acknowledge that the password has been changed.

3. Aleph Modules

These modules can be accessed via the Aleph Desktop Client:

<table>
<thead>
<tr>
<th>Module</th>
<th>Used For</th>
<th>Icon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acquisitions/Serials</td>
<td>Ordering, receipt, payment, and claiming of all materials, item check and maintenance, creation and maintenance of vendor and budget records, creation and maintenance of routing lists and serial subscriptions</td>
<td>![Icon]</td>
</tr>
<tr>
<td>ALEPH Administration</td>
<td>Aleph table configuration (used by OIS only)</td>
<td>![Icon]</td>
</tr>
<tr>
<td>Cataloging</td>
<td>Creating and editing bibliographic, holdings and authority records, creating and editing item records</td>
<td>![Icon]</td>
</tr>
<tr>
<td>Circulation</td>
<td>Charge and discharge of materials, hold requests, patron data, bill/fine</td>
<td>![Icon]</td>
</tr>
<tr>
<td>Interlibrary Loan</td>
<td>Not in use at Harvard</td>
<td>![Icon]</td>
</tr>
</tbody>
</table>

There is also a web-based module, the OPAC (or Online Public Catalog) called HOLLIS Classic.

In 2009, Harvard implemented a new interface for HOLLIS, and the existing interface was renamed HOLLIS Classic.

4. Tour of the Aleph Client

This section provides information about the layout of the Aleph client and lists features that are common to all modules. This is a basic introduction. To learn about specific Aleph modules consult the list of training sessions available at: [http://hul.harvard.edu/ois/systems/aleph/f-training.html](http://hul.harvard.edu/ois/systems/aleph/f-training.html).

Copies of the training documentation are available at the Aleph Documentation Center: [http://hul.harvard.edu/ois/support/docs-aleph-train.html](http://hul.harvard.edu/ois/support/docs-aleph-train.html).
4.1 Layout of the Aleph Desktop Client

- **Title Bar**: Displays the module, library and server information.
- **Menu Bar**: Main menu options. Press the <Alt> key and notice an underline beneath a letter in each menu choice. Press <Alt> + the letter to open up that menu choice. Functions specific to each module/tab are found under the menu bar. In addition to selecting a function from the drop down menu, keyboard equivalents are also available for many functions.
- **Search Bars**: Located beneath the menu bar. Input information in each bar to open up a specific tab within a module. For example, the Cataloging module has two bars: the Record Bar and the Item Bar. Options for what types of information can be input into these bars are explained within the specific module sections below.
- **Upper Pane**: Displays search options, search results or lists of records, (e.g. Order List, Items List, Check-In List, Bibliographic records, etc.).
- **Horizontal Split Bar**: Resize the upper or lower pane larger by moving this bar. Once moved, the bar will remain persistent until changed.
- **Lower Pane**: Displays details of whatever record is highlighted in the upper pane.
Introduction to the Aleph Client & Staff Searching

- **Operations Bar**: Contains icons to exit completely out of Aleph, access other Aleph modules, and change passwords.

- **Vertical Split Bar**: Resize the navigation pane larger or smaller by moving this bar. Once moved, the bar will remain persistent until changed.

- **Main Tabs**: Tabs that indicate specific functional areas within a module. Click to choose a tab (or navigate to each tab using function keys – see the list of function keys under View on the Main Menu).

- **Navigation Pane**: This pane lists functions available on a particular tab and consists of Roots (higher level) and Nodes (lower level).
  - **Root**: Specific function on a tab. Click to select a Root (or <Ctrl> + <Alt> + letter found in brackets) to select a Root.
  - **Nodes**: Individual function below the Root. Click to select a Node (or <Ctrl> + <Alt> + letter found in brackets) to select a Node.

4.2 **Functions Found in All Aleph Modules**

- **Search Tab**: Each module includes a search tab that can be used to search for bibliographic records. Access the tab in each of the modules by clicking on it or using the F9 function key.

- **Functional and Overview Modes**: Some of the module tabs include Functional and Overview Modes found at the top of the Navigation Pane.

  ![Functional vs. Overview Modes](image)

- **The Functional Mode** shows the functions available on that tab. For example, in Search, the Functional Node displays the search nodes (Find and Browse) and the Show node (display of search results).

- **Overview Mode** displays an overview of a specific record group (a bibliographic record and all its linked holdings, items, orders, etc.). The Overview Mode can be used to push a title from one tab to another or one module to another. See section 11 for more information about how Overview Mode is used.

- **Switching to Other Modules**: Open up another module by clicking on one of the icons located on the Operations Bar. Note that this will not "push" the record you're working on to another module -- use Overview Mode to do that.

- **Context-Sensitive Help**: In each Aleph module, you will notice a large blue question mark on the main menu. Click on a certain area on the screen and then click on this icon, or press the F1 function key to open the context-sensitive help for the area you are interested in.

- **Objects Node**: The pyramid icon can be ignored. It is related to the Aleph Digital Asset Module (ADAM) which is not in use at Harvard.
4.3 Persistence

The system remembers the last place it was when the module is closed.

- For example, if the Search Tab was last open when the module was closed, the module will open up to that tab the next time Aleph is opened. (It is important to note that only the tab will open – records are not automatically remembered after the system is closed.)
- **Persistent Indices:** Aleph will also remember the last indices searched in the Search Tab and will open the Find Search or Browse Search to the chosen index.
- **Serials and Order Bar:** Aleph will also remember the index choice made on the Serials or Order Bar in the Acquisitions/Serials Module.
- **Persistent Column Headings:** Column headings can be added to lists such as the Items List in the Items Tab. Add or subtract to the list of columns by right-clicking on any of the column headings. A Header Configuration Box will appear:

![Header Configuration Box](image)

*Header Configuration Box, Search Tab, Show Node, Brief List*

Add or subtract to the column headings and click the OK button. The columns will remain persistent on the workstation.

5. Desktop Client Navigation

A list of general navigation keys can be found in Appendix 1.

5.1 Pane Navigation

The Aleph interface provides various ways to move from pane to pane.

**Window Pane Focus:** In ALEPH, a window pane must be “in focus” in order to perform functions. You can move back and forth between panes or use keyboard equivalents to target specific parts of the screen. Here is the list of keyboard equivalents to navigate around the display panes:

<table>
<thead>
<tr>
<th>Shortcut Keys</th>
<th>Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;Ctrl&gt;+&lt;Tab&gt;</td>
<td>Move forward around the window panes and bars</td>
</tr>
<tr>
<td>&lt;Ctrl&gt;++&lt;Alt&gt;++&lt;Tab&gt;</td>
<td>Move backward around the panes and bars</td>
</tr>
<tr>
<td>&lt;Ctrl&gt;+1</td>
<td>Places focus on the Navigation Pane (left hand pane) in all mod</td>
</tr>
</tbody>
</table>
5.1.1 **Pane/Bar focus:**

- **Upper, Lower, and Navigation Panes:** A pane is in focus when it is outlined in red.

- **Record Bars:** When the focus is on a bar, either the index field will be highlighted (as with the Serials Bar and Order Bar in Acquisitions/Serials) or the cursor will be flashing in the field (as with the Cataloging Bar, Item Bar, Patron Bar, or Invoice Bar).

5.2 **Using the Keyboard to Navigate within Panes**

There are several general function keys you can use to access buttons and functions within a focused pane. Remember that the particular pane must be in focus:

- **Tabs:** Use <Alt> + a tab number to move from tab to tab within a pane.
- **Buttons:** Use <Alt> + the underlined letter to access a button.
- **Drop down menus:** Use the F4 key to open up a drop down menu represented by a right arrow. The Escape key will close the menu.
- **List Boxes:** Use the space bar to open up a list box. To see an example of one of these boxes, see the Items Bar in the Cataloging Module or the Invoice Bar in the Acquisitions Module.
- **Navigating through fields:** You can tab forward through most fields and use <Shift> + <Tab> to navigate backwards.
- **Roots and Nodes:** Use <Ctrl> + <Alt> + letter in brackets to select a particular Root or Node on the Navigation Pane. If the Navigation Pane is in focus, you can also use the arrow keys on your keyboard to select a Root or Node.

Revised: June 3, 2011
Main Menu: Use the <Alt> + letter to open up Menu bar options.

What if nothing or the wrong thing happens? If you try to use a keyboard equivalent and nothing happens, or a menu item opens up instead, check your focus: in order for keyboard equivalents to work within a pane, that pane MUST BE IN FOCUS.

6. Aleph Libraries

In Aleph, it is important to distinguish between the terms "library" and "sublibrary." A “library” in Aleph is a database of records, not a physical location. Harvard library locations are represented in Aleph by a 3 letter code called a sublibrary code. Widener, Gutman, Fine Arts, and Law libraries are represented in holdings records by the sublibrary codes WID, GUT, FAL, and LAW respectively.

A list of sublibrary codes is at http://hul.harvard.edu/ois/systems/aleph/docs/codes_sublibrary.pdf

6.1 Aleph HVD Libraries

The table below explains the various libraries used in the ALEPH system:

<table>
<thead>
<tr>
<th>HVD Databases in the ALEPH System</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Database:</strong></td>
</tr>
<tr>
<td>HVD01: Bibliographic</td>
</tr>
<tr>
<td>HVD02: Resources (Nat'l)</td>
</tr>
<tr>
<td>HVD03: Resource (Other)</td>
</tr>
<tr>
<td>HVD05: Anthro Lit</td>
</tr>
<tr>
<td>HVD10: Authority LC</td>
</tr>
<tr>
<td>HVD12: Authority MeSH</td>
</tr>
<tr>
<td>HVD30: Course Reserves</td>
</tr>
</tbody>
</table>
HVD50: Admin

HVD50 contains Order Records, Item records, Subscription Records, patron records, bill/fine records, charge and discharge data, recall and hold data. When one of the above non-MARC records are created in Aleph, the system creates an ADM record linked to the appropriate bibliographic record in HVD01. Aleph automatically connects to HVD50 in the Acquisitions /Serials and Circulation Modules.

HVD60: Holdings

Holdings records contain library specific information such as location and call number. Holdings records created in the Cataloging Module are automatically saved in HVD60 and linked to the appropriate bibliographic record in HVD01 through the LKR field. To call up a holdings record by its system number connect to HVD60.

EXT01: [External database]

External databases that are searched using Z39.50 are given this designation.

The diagram below shows how bibliographic, holdings and administrative data are linked in Aleph:

Links between records in Aleph
6.3 Accessing HVD Libraries

To see the Aleph libraries (databases) at Harvard, click on the ALEPH menu, and choose Connect to. This list can also be accessed by right-clicking on the Library Icon located at the bottom right.

<table>
<thead>
<tr>
<th>Cataloging module - Menu Options: ALEPH&gt;Connect to</th>
</tr>
</thead>
<tbody>
<tr>
<td>• HVD01 - Bibliographic</td>
</tr>
<tr>
<td>• HVD02 - Resource File (Nat'l)</td>
</tr>
<tr>
<td>• HVD03 - Resource File (other)</td>
</tr>
<tr>
<td>• HVD05 - Anthro Lit</td>
</tr>
<tr>
<td>• HVD10 - Authority LC</td>
</tr>
<tr>
<td>• HVD12 - Authority MeSH</td>
</tr>
<tr>
<td>• HVD30 - Course Reserves</td>
</tr>
<tr>
<td>• HVD50 - Admin</td>
</tr>
<tr>
<td>• HVD60 - Holdings</td>
</tr>
</tbody>
</table>

The current library in any of the Aleph modules displays at the top of the screen on the Title Bar:

![ALEPH Cataloging - Version 20.01 Library: HVD01 - Bibliographic (HVD01) Server: dewey.hul.harvard.edu:6505 (20.01)](Title Bar: Library Information)

Aleph automatically opens the appropriate library when you log on. Catalogers who work with holdings or authorities may connect to HVD60 and HVD10 to search for those record types.

6.4 Changing HVD Libraries

Catalogers connect to HVD10 to work with authority records. To search for an authority record by its system number, for example, change libraries to HVD10, the Authority Library. From the ALEPH>Connect to menu or the Library Icon, select HVD10 from the list of libraries:

Selecting HVD10 from List of Libraries

The Title Bar now says Library: HVD10, and the bullet in ALEPH>Connect to is now next to the HVD10 library.

![ALEPH Cataloging - Version 20.01 Library: HVD10 - Authority LC (HVD10) Server: dewey.hul.harvard.edu:6505 (20.01)](Title Bar -- Library: HVD10)

Select ALEPH>Connect to or the Library Icon and select HVD01 to return to the bibliographic library.
7. Staff Search Options in Aleph

The **Search Tab** appears in each of the Aleph Functional Modules (Acquisitions/Serials, Cataloging and Circulation). You can search the entire bibliographic database from the Search Tab. To access the Search Tab within a module, click on the Tab or press the F9 function key.

The **Search Tab** can be used to:

- Search the bibliographic database and display matching records
- View holdings information for individual copies of titles
- View circulation information, such as the current loan status
- View item information
- Save sets of records
- Email sets of records
- Move, or “Push,” records to other tabs or modules

7.1 The Search Tab

There are two ways to look for material on the Search Tab:

- **Find** is a keyword search. You can search titles, authors, subjects, numbers, etc.

  **Find** searches come in three varieties: Advanced Search, Multi-base CCL (Common Command Language) Search and Multi-field Search. The result of a **Find** search is a set of records.

- **Browse** allows you to choose a point at which to begin looking through an index such as author, title, subject, ISBN, etc.

We will begin by looking at Find searches first.

7.2 The Find Node

Find allows you to perform keyword searches on a group of fields, on specific fields, or in a selection of databases simultaneously.

To perform a Find search, click on **Find** in the Navigator Pane or press <Ctrl>+<Alt>+F keys.
7.3 Advanced Search

Select the Find node on the left to view the search interface in the upper pane. Advanced Search is the default option unless you have changed your tab options on your workspace.

Advanced Search allows you to choose from a list of indexes in order to search any single Harvard library (database). It also allows keyword searching within and between search fields. (Example: Words-Titles). For these reasons, it can be used for both very broad and precise searching.

The keyboard shortcut for the Advanced Search tab is <Alt>+1.

You can search up to three separate keyword indices using the Advanced Search. There is a pull-down list of all available search fields, and three styles of search.

Once you select an index, that index will remain persistent on the Advanced Search Tab until you change it. Information about the contents of each of these indexes can be found in the documents Definition of Index Codes, Index Contents by MARC Tag, and Index Contents by Index Code which are available on the Aleph Documentation Center.

7.3.1 Using Advanced Search

1. Select your Base: The default base is HVD01, the Harvard Bibliographic Database. To search another library, such as one of the Resource files or the Authority File, select the appropriate base from the drop down menu (you can click on the menu or press F4 to open the menu).

2. Highlight the first index you wish to search by selecting the index from the drop down menu.

3. Enter your search term in the field to the right of the first index box. Optional: If you wish to search a phrase, you can check off the Words Adjacent Box. Leave blank if you do not wish to search a phrase.

4. If you wish to search more than one keyword index, you can choose one of the Boolean operators found below the first search field. You can choose AND, OR or NOT.

5. Select the next index you wish to search in the Second search field and enter the search term.
6. If you wish to search another keyword index, choose the appropriate Boolean operator and the third search box and type your search term.

7. Click **OK** or press the <Alt> + O keys or hit the <Enter> key to perform your search.

### 7.3.2 Advanced Search Results

If your search retrieves 5 or fewer records, you will be brought immediately to a display of search results, in the **Show Node**. See section 9 for more information about the Show Node.

If the search finds more than five records, a list of sets that indicating the total number of records found in your search will appear below the Advanced Search screen. Options for printing, emailing, saving or viewing search results are found in sections 8.6.1 and 9.2.8. of this guide.

The List of Sets

### 7.3.3 Clear Button

You can click on the **Clear** button or press <Alt> + l (letter l) keys to clear a search. Note that Clear will clear your search terms only; the index choice you made will not change.

### 7.3.4 Search History

To the right of each search field you will find a list box. If you click on the box (or tab to highlight it and hit the Space bar), you will see the previous term that you searched.

Search History List Box
7.4 Multi-base CCL Search

Multi-base CCL search enables searching of multiple databases simultaneously. Multi-base CCL uses a search syntax called Common Command Language (CCL). Using CCL will allow you to avoid using pull-down menus if that is your preference.

Click on the 2. Multi-base CCL Search tab or press the <Alt>+2 keys while the Find Search Window is in focus to access this search.

![Multi-base CCL Search](image)

7.4.1 Multi-base CCL Search Codes

Here is the list of CCL codes that are used to search HVD01:

<table>
<thead>
<tr>
<th>Code</th>
<th>Content of Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>WAN</td>
<td>W-Author</td>
</tr>
<tr>
<td>WCN</td>
<td>W-Organization</td>
</tr>
<tr>
<td>WEN</td>
<td>W-Series</td>
</tr>
<tr>
<td>WFN</td>
<td>W-Notes</td>
</tr>
<tr>
<td>WFP</td>
<td>W-Credits/Performances (508_511)</td>
</tr>
<tr>
<td>WFQ</td>
<td>W-541</td>
</tr>
<tr>
<td>WFT</td>
<td>W-MARC Format, as defined by Aleph: BK=book, CF=computer file, MP=cartographic material, MU=music (sound recordings, musical or other, and scores), SE=serials, VM=visual materials, MX=mixed materials</td>
</tr>
<tr>
<td>WHA</td>
<td>W-Harvard Added (H29, H79)</td>
</tr>
<tr>
<td>WIL</td>
<td>W-Place of Publication</td>
</tr>
<tr>
<td>WIP</td>
<td>W-Publisher (260+)</td>
</tr>
<tr>
<td>WLG</td>
<td>W-Language (008)</td>
</tr>
<tr>
<td>WLO</td>
<td>W-Place of Publication Code</td>
</tr>
<tr>
<td>WNN</td>
<td>W-Names all</td>
</tr>
<tr>
<td>WPY</td>
<td>W-Pinyin review text (987)</td>
</tr>
<tr>
<td>WQC</td>
<td>W-Format of score (MU 008)</td>
</tr>
</tbody>
</table>
### Code | Content of Index
--- | ---
WQS | W-Type of serial (SE 008)
WQX | W-Index (BK, MP 008)
WRD | Words
WSL | W-Location (Sublibrary)
WSN | W-Subjects
WST | W-STA (Aleph STAtus value for record, e.g. SUPPRESSED)
WTN | W-Titles All
WTW | W-Title on piece
WTW | W-Serial-Title on piece
WXA | W-Leader 06 - Type of record
WXB | W-Leader 07 - Bibliographic level
WXC | W-Leader 08 - Archival Control
WXD | W-006 byte 00
WXE | W-eResource (856 indicator)
WXF | W-007 byte 00-01
WXG | W-URL in notes
WYR | W-year (008)

The full list of CCL codes is listed in [Definition of Index Codes](#), which is available on the Aleph Documentation Center.

**Note:** A list of CCL codes can also be found in the Context Sensitive Help for the Aleph Search Module. Unfortunately, this list is NOT the Harvard list of CCL codes. Refer to the Harvard documentation site for the list of CCL codes in use at Harvard.

### 7.4.2 Searching HVD01 with Multi-base CCL Search

To perform a Multi-base CCL Search in HVD01

*Multi-base CCL Query Search*
1. Make sure that the HVD01 box is checked.

2. Type in the CCL code (e.g. WTN), add an equal sign, and then the search parameter, e.g. WTN=library. If you wish to add a Boolean operator, type a space and add the operator. Then type the next CCL code and parameter, e.g. WTN=library and WSN=change.

3. Select OK or press <Enter> or press <Alt>+O on the keyboard to execute the search.

If your search retrieves 5 or fewer records, you will be brought immediately to a display of search results, in the Show Node. See section 13 for more information about the Show Node.

If the search finds more than five records, a list of sets that indicating the total number of records found in your search will appear below the Advanced Search screen. Options for printing, emailing, saving or viewing search results are found in sections 12.6 and 13 of this guide.

### 7.4.3 Searching multiple databases with Multi-base CCL

Multi-base CCL allows a single search to be directed to multiple databases. You can check off the databases that you wish to search from the CCL window. When executed, the search is run on each selected database simultaneously. For example, Multi-base CCL can be used to search HVD01 (the Harvard bibliographic database), HVD02 (the Library of Congress resource file), and the OCLC WorldCat database all at once. Other library databases such as the full Library of Congress catalog can also be searched using the Z39.50 protocol.

**A note about Z39.50 searches:** The Library of Congress is included as a Z39.50 target in the Aleph v. 20 client. Configuration on the server and at your desktop is required to make this function available for other databases, such as WorldCat. Login updates are needed as well. Forms for requesting access to a database via Z39.50 are available on the Data Loads page at: [http://hul.harvard.edu/ois/systems/aleph/dataloads.html](http://hul.harvard.edu/ois/systems/aleph/dataloads.html).

To perform a Multi-base CCL Search on multiple databases:

![Multi-base CCL Query Search-Searching Multiple Databases](image)

1. Select the library or database you wish to search by checking the box next to the library. Note that these choices will remain persistent on your workstation until you change them.
2. Type in the CCL code (e.g. WTN for Title all), add an equal sign, and then the search parameter, e.g. WTN=poems TIN=. If you wish to add a Boolean operator, type a space and add the operator. Then type the next CCL code and parameter, e.g. wtn=poems =library and WAN=emerson.

3. Hit the OK button or press <Enter> or press <Alt>+O on the keyboard.

4. **Be aware that some CCL search codes are not used by all Z39.50 databases.** A list of CCL codes that can be used across most databases can be found in the document *CCL Index Codes Common to HVD01, HVD02, HVD03 and Z39.50 Targets*.

### Multi-base CCL Search Results

Note that results from each database selected will display on a separate line. It is not possible to combine results sets from multiple databases.

#### 7.4.4 Advanced Searching with Multi-base CCL

In addition to applying Boolean Operators between search terms, you can also apply Boolean Operators, truncation, wildcard characters and parenthesis *within* each search term:

<table>
<thead>
<tr>
<th>Search Option</th>
<th>Description</th>
<th>Operands</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Boolean Operators</strong></td>
<td>If more than one word is entered the Words Adjacent box is not checked, Aleph will retrieve only records that contain all the terms entered. The word &quot;and&quot; is implicit in your search.</td>
<td>AND, OR or NOT. (Note: you have to capitalize these)</td>
<td>Red and white accountancy or bookkeeping, &quot;shipping&quot; not 'plymouth'</td>
</tr>
<tr>
<td><strong>Truncation</strong></td>
<td>Words may be left- or right-truncated.</td>
<td>* or ? (Note: characters are interchangeable.)</td>
<td><em>national will find international, multinational and national national</em> will find nationalise, and nationalis</td>
</tr>
<tr>
<td><strong>Wildcards</strong></td>
<td>Wildcard characters can be inserted within a word.</td>
<td># is used for one character that may not be present ! is used for one character that be present ? are used for any number of characters</td>
<td>humour# will find humor at humour wom!n will find woman at women ps?ic will find psychic and psychotic</td>
</tr>
<tr>
<td><strong>Parentheses (Nesting)</strong></td>
<td>For more sophisticated searches, you may wish to place parentheses around search elements to specify priority when parsing the command.</td>
<td>For example, the search: <em>history and england or wales</em> produce very different results from the search: <em>history and (england or wales)</em></td>
<td></td>
</tr>
</tbody>
</table>
7.5 Multi-field Searching

Multi-field Search is a quick way to search the most commonly used keyword indexes. This tab is a good choice for looking up a specific item or running a quick search. To access the Multi-field Search, click on the Multi-field Search tab or press the <Alt>+3 keys.

1. Select the Base you wish to search (HVD01 will be the default).
2. Click on or tab to the index term you wish to search.
3. Enter your search term in the field. If you wish to search multiple fields, add the word or words in the appropriate index field.
4. Click OK or hit the <Enter> key or press the <Alt>+O keys.

If your search retrieves 5 or fewer records, you will be brought immediately to a display of search results, in the Show Node. See section 13 for more information about the Show Node.

If the search finds more than five records, a list of sets that indicating the total number of records found in your search will appear below the Advanced Search screen. Options for printing, emailing, saving or viewing search results are found in sections 12.6 and 13 of this guide.

7.6 The List of Sets

Search results for Advanced Search, Multi-base CCL Search, and Multi-field Search are listed in the lower pane of the Find screen.

List of Sets—Find Search History

There are five buttons to the right of the List of Sets: Print/Send, Remove, Save, Load and Show.
7.6.1 **List of Sets Buttons: Print/Send**

Select Print/Send to print out a set, email a set, or save the set to a file on your PC. Click on the button or press <Alt>+P.

**Print/Send Button Window**

To Print:

1. Before selecting Print/Send you may want to enable Preview in Aleph in order to first view the report on-screen. Preview is enabled by right-clicking on the the printer icon in the bottom right hand corner and selecting Preview from the menu. When Preview is selected, Send E-mail and Save on Disk radio buttons will be inactive.

2. After selecting Print/Send, choose the format of the records and select OK. The five format types correspond to the display options on the lower pane of the Show node.

3. Your records will either Print -- or if Preview is enabled -- display on screen. From Preview, select Print or Close to select a different record format.
Print Preview of MARC Tags View

To E-mail:
Choose Send E-mail and a window will appear asking for a subject and email address:

![Send Records by Email](image)

Send Records by Email

To Save in a file on your PC:
Choose Save on Disk and give the set a name.

7.6.2 List of Sets Buttons: Remove
Removes one or more sets from the List of Sets. Note that this button will only remove the set from the List of Sets; it does NOT delete any records in the database. Click on Remove or press <Alt>+M. You will be asked if you wish to remove the set. Click Yes to remove. To remove multiple sets, hold down the Shift key and use the arrow keys to highlight the lines above or below.

7.6.3 List of Sets Buttons: Save
Saves the records in the result set to a file on the server. Save should not be used since files saved on the server may be removed or overwritten. Use My Records instead.

7.6.4 List of Sets Buttons: Show
Moves records to the Show node for display. Click on the button or press <Alt>+W.
7.7 Refining a Search Result

You can refine searches by using the Refine option located on the right hand side of the screen.

To use Refine:

Refining a Search Set

1. Highlight the search set you wish to refine in the List of Sets.
2. Select your index beneath Refine and type the word or phrase to refine the search.
3. You must click the Refine button or press the <Alt> + R keys. If you hit the OK button, Alt + O or the Enter keys, the system will just re-issue the selected search on the Advanced, Multi-base CCL or Multi-field Search Tabs.

To Clear a Refine Query, click on the Clear Refine button.

7.8 Cross Sets

Search sets can be combined by highlighting one set, pressing the <Ctrl> key and selecting another set from the List of Sets.
You then specify how you wish the sets to be combined by selecting one of the following options:

- **AND Sets**  Performs an ‘AND’ operation, narrowing results to records that occur in all selected sets.
- **OR Sets**  Performs an ‘OR’ operation, combining records from all selected sets into one.
- **First Set, Not Second**  Performs a ‘NOT’ operation, removing from the first set any records that are also included in the second set.
- **Second Set, Not First**  Performs a ‘NOT’ operation, removing from the second set any records that are also included in the first set.

To execute the search, select **Cross Set**.

Please note that it is not possible to cross sets between databases. For example, you cannot combine a set from the HVD01 database and the HVD02 database.

Your search results from Cross Sets will appear in the List of Sets. Viewing search results are found in the next section of this guide.

### 8. Search Results: The Show Node: Upper Pane

To see the search results associated with a set, double click on the set, or with the set highlighted, click on the **Show** button or press <Alt> + W. This will open up the [H] **Show Node** under **Search**.

---

*Revised: June 3, 2011*
The Upper Pane will contain your list of search results and three tabs: Brief List, My Records and Brief Recs. The Lower Pane will show the individual record that is highlighted in the Upper Pane.

8.1 Full Screen Mode

It can be helpful to give your search results a bit more space on the screen by using the “Full Screen Mode”. This allows you to enlarge a pane so that it takes up all of the space of the Upper and Lower Pane or the entire screen. The pane that you wish to see in Full Screen mode must be in focus first.

To Activate Full Screen Mode: Click on the Full Screen icon located on Cataloging bar at the top right of the Upper Pane (Ⅲ) or press <Ctrl> + J.

When Full Screen is selected the first time, the active pane will take up the window occupied by the Upper and Lower Panes.

Selecting Full Screen a second time will expand the pane further to take up the space occupied by the Upper, Lower and Navigation Panes.

When Full Screen is selected a third time, the pane will return to regular size.

Full Screen display is not persistent: There is no way to set Full Screen so that it will always open to a specific full screen display. You will need to click the Full Screen icon or press <Ctrl> + J each time to invoke the Full Screen Mode.

8.2 Brief List Tab

Records in the Brief List are sorted by default in reverse chronological order by date of publication, and then alphabetically by author.

The upper pane displays a list of records in the result set. Information from each record is presented in a columnar format. By default the columns show number of the title/total records, Call Number PST, title (240), title (245), and year. The display is configurable.

The search term used for the display appears beneath the tabs; current sort order is always beneath the search term.

Column headings on the Brief List display:

Doc. No: The number of documents found
PST Call Number: The first call number of the first holdings record associated with the bibliographic record
Author: First author on the bibliographic record (main entry)
Title (240): Title from 240 field in the bibliographic record (uniform title)
Title (245): Title from 245 field in the bibliographic record (title field)
Year: Taken from the Leader in the bibliographic record (Publication Date 1)
Standard Number: ISBN or ISSN of Title

The Brief List display can be customized by changing the column width, selecting a primary and secondary sort, and selecting the columns to display.
8.2.1 Large Result Sets

The number of results that will display on the Brief List is limited to 1500. If your search retrieves more than 1500 records, only the first 1500 will display on the Brief List.

Narrowing your search using **Refine** or **Cross Sets** will reduce the number of results.

Show Node of Large Search Sets: 1500 Documents

8.2.2 Sorting Search Results

Resort search results in the Brief List by using the Sort button.

1. Click on the **Sort** button or press the `<Alt>+R` keys.
2. The **Sort Fields Dialog Box** will appear:

   ![Sort Fields Dialog Box](image)

   - To change the sort order on the first level, click on the **down arrow** of the first level and change to something else, e.g. Author.
   - To change the sort order on the second level, click on the **down arrow** and change to something else, e.g. Title.
   - To change the order from **Descending Ascending Order**, click on the **Sort Order radio button**.
8.2.3 **Jump Feature**

Aleph also allows you to jump through your search results by using the **Jump** textbox at the bottom of the **Brief List Display**.

For example, by typing “2003” in the **Jump to:** textbox at the bottom of the Brief display, Aleph moves to the point in the brief list for titles published in 2003. Note that this is based on first level sort, which has been set to Year in the screen shot below:

---

### Jump to textbox

8.2.4 **Redisplaying Search Results**

As you are moving Search Results from the Find Node into the Show Node, the system will remember the sets that you have added to the Show Node throughout your session. In this way, you can bring up Search Results without having to go back to the Find Node. By selecting the drop down arrow beneath the 3-tab display in the Upper Pane, you will see the search results that you have displayed throughout the session:

---

### Redisplaying Search Results

Select the search set you wish to redisplay and it will appear in the Brief List. You can also click on the arrow keys pointing to the left and right to bring up each search set. Note that if you have re-
8.2.5 Selecting Records for further action

Records from your results list can be saved to a new set, printed, emailed or pushed into the My Records tab.

To select records for further action:

- Select a single record by highlighting that record on the Brief List and clicking one of the buttons to the right. A range of records can be saved, such as records 1-10, by highlighting record number 1, holding down the <Shift> key and scrolling down to number 10. Records 1-10 will now be highlighted. You can then click one of the buttons to the right.

- Select a group of records such as records 1, 3, 5, 7, 10, 11, 15, 19 by highlighting record number 1, then hold down the <Ctrl> key and select the remaining records. You can then click one of the buttons to the right.

- Select all of the records this same way as you select a range of records.

8.2.6 Brief List Buttons: Sort

See section 8.2.2 above.

8.2.7 Brief List Buttons: Save As

Use the Save As button to select records from your results list and create a new set in the List of Sets.

If you wish to save records to your PC, use the Print/Send button (9.2.8) or My Records (9.3).

To use Save As:...

1. Select the record or records you wish to save.
2. Click on the Save As... button or press <Alt> + A.
3. The Add Set to List of Sets Dialog Box will open. A default will appear in the Enter Set Name Field denoting a set number:

   ![Add Set to List of Sets Dialog Box](Save as Dialog Box)

   You can change the name of this set by typing over the Set number, as demonstrated below

   ![Add Set to List of Sets Dialog Box](Renamed Set)

Revised: June 3, 2011
4. Click on OK, press Enter or press <Alt> + O on the keyboard. Your search result will now appear with its new name in the List of Sets on the Find Window.

![Renamed Set Added to List of Sets]

### 8.2.8 Brief List Buttons: Print/Send

Use the Print/Send button to select records and print, email or save them to your hard drive.

1. Select one, a range or a selection of records using the same method described in section 13.3.
2. Click Print/Send or press the <Alt> + P keys.
3. Select Print, Email or Save. Follow the process described in section 8.6.1.

### 8.2.9 Brief List Buttons: My Records

*See section 8.3 below.*

### 8.2.10 Brief List Buttons: Catalog

Use the Catalog button to move one record, a range of records or a selection of records from the Search Tab to the Records tab of the Cataloging module. The Records tab is for editing bibliographic, holding and item records.

To move records into the Records tab:

1. Select one or more records (using the method described in section 8.2.5).
2. Click the Catalog button or press <Alt> + C.
3. The Records tab will open and the records will appear beneath the Edit Records node. The last record selected from the Brief list will display in the upper pane.

Functions available in the Records tab are covered in more detail in the *CATA: Creation and Editing of Bibliographic Records* class.

### 8.3 My Records Tab

The second tab in the Upper Pane is My Records.

My Records allows you to select records from different search results and save them to your hard drive for future use. This function is useful if you work with the same titles often (such as periodicals check-in) or frequently consult a title that takes extra time to search and identify (such as a serial record with a one word title).

My Records offers a way to collect items of interest during your search session. Records found through any of the search methods in Aleph can be selected and stored in My Records and then saved, emailed or printed as a group.
To use My Records:

1. Highlight one or more records from the Brief List.
2. Click the My Records button or press <Alt> + M.
3. Tab 2. My Records will open. The records will display on the list:

<table>
<thead>
<tr>
<th>Doc no.</th>
<th>Call No.</th>
<th>PST</th>
<th>Author</th>
<th>Title (245)</th>
<th>Title (245)</th>
<th>Year</th>
<th>Standard No.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/1</td>
<td>794:44</td>
<td>C47</td>
<td>Child, Julia</td>
<td>My life in France /</td>
<td></td>
<td>2006</td>
<td>1402045460 1000</td>
</tr>
<tr>
<td>2/3</td>
<td>641.81 C25</td>
<td></td>
<td>Clayton, Bernard</td>
<td>The breads of France and how to bake them in your own kitchen /</td>
<td></td>
<td>2078</td>
<td>0675200710</td>
</tr>
</tbody>
</table>

**Selected Records Added to My Records Tab**

This list will remain persistent throughout your session. As you search and display additional sets, you can add records to My Records.

### 8.3.1 My Records Buttons: Save, Reload, Clear, Remove

1. Highlight a selection of records on the Brief List and move them into My Records by clicking on the My Records button (or pressing <Alt>+M).

2. When you are ready to save a set of records, click the Save button (or press <Alt>+V). A dialog box will open asking you to name the set. Type in the File name of the set, and click the Save button to the right of the File name. The records are saved in a file on your local drive.

**Saving records in My Records**

Once the set of records is saved on the local drive, it can be retrieved anytime.

To retrieve files saved using My Records:

1. Open the Aleph client to any module and click on the Search Tab or press F9.
2. Click on the Show Node and select tab 2. My Records. The pane will be empty.
3. Click on the Load button or press <Alt> + L. A dialog box opens to show files saved previously:

4. Highlight a file name and click Open. The records will appear in the upper pane:

Once the list of records appears in My Records, records can be added to or removed from the set.

Highlighting records on the Brief List display and clicking My Records will add the records to My Records. The set can then be re-saved with either the same or a different name.

To remove one or more records, highlight the lines in My Records and click the Remove button. This removes the title from My Records, but not from the Aleph database.

To clear the list from the display, click the Clear button.

Multiple sets of records can be saved using My Records.

### 8.3.2 My Records Buttons: Print/Send

See Section 7.6.1 above for instruction on using this function.
8.3.3 My Records Buttons: Catalog

See Section 8.2.10 above for instruction on using this function.

8.4 Brief Records Tab

The third tab in the upper pane of the Show node is called Brief Records. Records retrieved in the Find node do not display in Brief Records. The tab is used to display records retrieved from the Browse list indexes. Brief Records are covered in more detail in section 11.3.7.

9. The Show Node: Lower Pane

The Lower Pane allows you to choose between five different views of individual records. The Lower Pane shows whatever record is highlighted in the Brief List or My Records in the Upper Pane.
9.1 Full Screen Mode and Navigation in the Lower Pane

The Lower Pane can be expanded to Full Screen mode. Select the lower pane to make it active, then select the Full Screen Icon (fullscreen icon) or press <Ctrl> + J. See section 9.1 for more on Full Screen mode.

To the right of the tabs, above the right and left arrow buttons, is a counter that shows the record number/total number of records in the set:

![Record counter](image)

To navigate forward, click on the Right arrow button. Once the next record displays, the Left arrow button will darken, allowing you to move back in the list.

9.2 Full+Link Tab

Use Tab 1, Full+Link for a labeled display of the bibliographic record that includes holdings and item information.

![Full+Link Display](image)

9.3 Full+Link Buttons

Some of the buttons to the right of the Full+Link display such as ‘Show Like’ and ‘Headings’ act on individual fields in the record. When a highlighted field contains information that appears in one or more record in the bibliographic database, the buttons become active.

9.3.1 Full+Link Buttons: Show Like

Selecting a field with the label Subj LCSH Topical will usually cause Show Like to become active. To become active, information in the field (such as ‘Cooks – France – Biography’ in the record below), must be used in at least one other record in the bibliographic database.
When a field is highlighted and Show Like is active, selecting the button will search the heading and bring back a brief list of all of the records that contain that heading:

Subject Entry Highlighted on Full+ Link Display - Show like Button Darkens

Show like Search Result

To return to your original results list, click on the down arrow beneath the Brief list tab. The pull-down menu will show all of your previous searches. Select your former search.
9.3.2 **Full+Link Buttons: Headings**

Headings is active when the highlighted field contains a name, title, series or subject heading. In the example below, Headings is selected while the subject heading ‘Cooks – France – Biography’ is highlighted in the Full+Link display. The subject heading is searched by default in the Headings List Subjects (LCSH). Different Browse lists are searched depending on the field that is highlighted. Selecting an author name and pressing Headings will search the name in the Authors index, while highlighting Title searches in the Title index.

*Headings Search on Main Entry*

To return to your original result list, click on the down arrow beneath the Brief list tab. The pull-down menu will show all of your previous searches. Select your former search.

9.3.3 **Full+Link Buttons: External**

If the Full+Link display includes an Electronic Location field, highlighting the field will activate the External button. Selecting External opens the web page in a new browser window.

*External Button Darkens when Electronic Location Field Highlighted*

9.3.4 **Full+Link Buttons: Link**

The Link button is not functional at Harvard.
9.3.5 Full+Link Buttons: Items List

If the Full+Link display includes an Items field (located at the end of the record), highlighting the field will activate the Items List button:

![Items List Button](image)

Selecting Items List will bring up a display of Item Record information:

![Item Display from Item List Button](image)

The window provides detailed information about items on that record for the same library. The column headings on this list are configurable -- right click next to one of the column headings to get a list of the available columns. The column headings choices include:

- **Sublibrary**: Appears twice -- for the full name of the library and for the 3-letter sublibrary code.
- **Collection**: Appears twice, in full and coded form. Area of the collection where the item is shelved. Blank indicates main collection or stacks.
- **Call Number**: The call number of the piece on the shelf.
- **Due Date**: If item is circulating, the due date appears here.
- **Status**: Item status (or circulation policy) of the piece.
- **Loans**: Number of times the item has been loaned
- **Requests**: Number of requests that have been made on the item.
• **Barcode:** Barcode number of the item.

Different buttons will display after Items List, depending on whether you are using the Cataloging, Acquisitions or Circulation module.

### 9.3.6 **Full+Link Buttons: Catalog (only in Cataloging)**

In the *Cataloging Module*, the Catalog button displays below Items List. The Catalog button is used to move records into the Records tab for editing.

### 9.3.7 **Full+Link Buttons: Items Tab (only in Cataloging)**

In the *Cataloging Module*, the Items Tab button displays below Catalog. The Items Tab button is used to move records into the Items Tab for editing.

### 9.3.8 **Full+Link Buttons: Order Tab (only in Acquisitions)**

In the *Acquisitions/Serials Module*, the Order Tab button displays below Items List. The Order Tab moves records into the Order tab where functions such as ordering and invoicing are performed.

### 9.3.9 **Full+Link Buttons: Serial Tab (only in Acquisitions)**

In the *Acquisitions/Serials Module*, the Serial Tab button displays below Order Tab. The Serial Tab moves records into the Serial tab where functional such as journal check-in are performed.

### 9.3.10 **Full+Link Buttons: Circulation (only in Circulation)**

In the *Circulation Module*, the Circulation button displays below Items List. Circulation moves records into the Items tab where the item can be edited or placed on hold.

In addition to the Full+Link display, there are four other options for full record display in the Lower Pane:

---

**Full+Link buttons in Acquisitions**

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Revised: June 3, 2011
9.4 **MARC Tags Display**

The second tab, **2. MARC Tags**, displays information from the bibliographic and holdings record with MARC field tags and subfield codes. MARC tags are the 3-5 alpha-numeric codes on the left (e.g. 24510). Subfields are denoted by the vertical bar followed by a single letter or number (e.g. [a]):

![MARC Tags Display](image)

**Full Record Display- 2. MARC Tags View**

9.5 **MARC Public View**

The MARC Public View displays information from the bibliographic and holdings record with the labels that are used in the online public catalog, HOLLIS Classic:

![MARC Public View](image)

**Full Record Format-MARC Public View**

Revised: June 3, 2011
9.6 Card Catalogue View

The Card Catalog display features a summarized view of the title, similar in appearance to what it would look like in a card catalog:

![Full Record Format - Card Catalogue View](image)

9.7 Citation View

The Citation view gives a bibliographic citation view of the title:

![Full Record Format - Citation View](image)
10. Overview Mode

The Overview button is used to move a record from one Aleph module to another -- for example, when a record is retrieved in the Acquisitions/Serials Module and needs to be moved to Cataloging to be edited. The Overview button can be used with any of the upper pane displays on the Show node, Brief List, My Records, or Brief Records and with any of the display tabs on the lower pane as well.

To use Overview Mode:

1. Highlight the record you want to move so that it displays in the lower pane.
2. Select the Overview button or press <Ctrl>+<Alt>+2.

The record will open in a new display as shown below:

[Image of Overview Mode on Navigation Pane]

[Image of Overview Mode]
The information is divided by library (or database):

**HVD01-[Aleph system number]**: When this is highlighted, a display of bibliographic, holdings and call number information displays in the center pane.

**OBJECTS**: Not in use at Harvard.

**HVD60**: Holdings records linked the bibliographic record are displayed under the HVD60 node. All of the sublibraries that own the title have an HOL record. The coded information following HOL is the sublibrary code and collection code. Beneath the holdings record is Barcode information for any item records that are linked to the holdings record. Highlighting a holding (HOL) or barcode, will display information for that record in the center pane.

**HVD50**: Records for administrative data such as Orders, Subscriptions, Items that are not linked to holdings and Loans made on the title are shown under the HVD50 node. Highlighting an order, subscription, item or loan will display information for that record in the center pane. The buttons on the right hand side of the **Overview** screen allow you to open a record in a different Aleph module – this is also referred to as “pushing”, or “moving” a record to another module.

**Catalog Record**: Selecting **Catalog Record** (or <Alt>+C) opens the record in the upper pane of the **Cataloging** module.

**Items Tab**: Opens the record in the **Items Tab** in the **Cataloging** module. Items linked to the bibliographic record will display in the upper pane.

**Circulation**: Opens the record in the **Items Tab** in the **Circulation** module.

**ILL**: Harvard does not use the ILL Module.

**Order Tab**: Opens the record in the **Order Tab** in **Acquisitions/Serials**, where you can place an order for the title or arrive a monograph or standing order.

**Serial Tab**: Opens the record in the **Serial Tab** in **Acquisitions/Serials**.

**Push to Search**: **Push to Search** will return you to the Functional display in Search (you can also click on **Functional** on the **Navigation Pane** or press <Ctrl>+<Alt>+1 to return to the **Functional Node**).

### 11. Browse Searching

**Browse** is used to scan lists (or indexes) of titles, authors, subjects, etc. Browse works by searching for a word or phrase that occurs at the beginning of the heading. Browse works best when you know the author, title, or subject you are interested in searching.

Browse indexes are created from whole phrases in the bibliographic record (such as the author, subject or title), and may be taken from a complete MARC field or specific MARC subfields.

Information about the contents of each browse index can be found in the documents: **Definition of Index Codes**, **Index Contents by MARC Tag**, and **Index Contents by Index Codes**, available at the Aleph documentation website: http://hul.harvard.edu/ois/support/docs-aleph-opac.html.
11.1 Performing a Browse Search

Click on the word Browse on the Navigation Pane or press <Ctrl>+<Alt>+B.

1. Select the base (or library) to search. HVD01 will be the default base.

2. Select an index from the Headings List. You can click on the drop down arrow or press the F4 key to open the menu. Type a letter to go to the first index that begins with the letter (e.g. typing the letter t will bring you to Titles).

3. Enter the starting text of the phrase in Enter starting text box.

4. Click on GO or press <Alt> + G keys or <Enter> to perform the search.

11.1.1 Enter Include Text

The text box Enter Include Text is useful when searching for heading that would require typing a long string. To search for ‘United States. Congress. Senate. Committee on the Judiciary. Subcommittee on Separation of Powers’ enter the beginning of the heading in Enter Starting Text, then select a word that occurs toward the end of the heading and enter it in Enter Include Text. Browse goes to the first entry that starts with ‘united states congress se’ and includes ‘separation’.

Search for LongHeading
11.1.2 Include Expanded AUT Data

This check box is selected by default. Expanded AUT data refers to the public notes that display in the index called Subjects (MeSH). MeSH stands for Medical Subject Heading. A search for ‘DNA’ in Subjects (MeSH) brings up the result shown below. With Expanded AUT Data selected, a public note from the authority record for DNA displays on the Browse list:

Expanded AUT Data: Public Note Information Associated with Heading

11.1.3 Include BIB/HOL Data

Selecting Include BIB/HOL data check box will change the results on the Browse List as follows:

Columns change to include

1) Heading

2) Bibliographic Info

3) Holdings Info

Headings are displayed separately for each holding:

As shown above, the Holdings Info column lists the sublibrary and collection code for each library that owns a copy of My life in France.
The BIB/HOL check box is only relevant for Headings Lists in the HVD01 library. The feature works best on indexes such as the title index where there are a limited number of holdings. Selecting the checkbox for a heading with many records (50+) will bring up a partial list of holdings.

### 11.2 The Browse List

Browse results are displayed in a Browse List, which is an alphabetical list of headings. Your search phrase or the phrase that most closely matches your search, will be the second entry on the list. The entry that precedes your term displays at the top of the list to provide context to the search.

#### Browse List of Authors

There are two types of browse list displays, one for Headings indexes such as Authors, Titles, Series and Subjects and another for indexes such as ISBN, ISSN and Call numbers.

Headings indexes are distinguished by columns labeled Ref. and Auth. info. where information from the authority file displays. In the example above, information in the Auth info. column shows that there is an authority record in HVD10 that has the same heading (Child, Julia) in the 100 field. Headings that match to a 1XX field in an authority record are in the authorized or correct form. Other forms of the heading from the 4XX fields have a + sign in the Ref. column.

The browse list for other types of indexes, such as ISBN, displays columns for Main entry, Title, Imprint and Year.

#### Browse List of Number: ISBN

Revised: June 3, 2011
Use the arrow keys, or page up and page down to scroll through the Browse list. To move to a different entry, input a new word or phrase in Enter Starting Text and select Go or press Enter. Search history for Enter Starting Text is visible by selecting the list box to the right of the entry box:

11.3 Browse Functions

Buttons to the right of the Browse list provide options for viewing, saving and editing records.

11.3.1 Browse Buttons: Expand

Authority records in HVD10 and HVD12 are linked to headings on the Author, Series and Subject indexes in HVD01. Headings linked to an authority record are identified by the information in the "Auth. info. column on the Browse list. To view information from the linked authority record, highlight the entry on the Browse list and select Expand. The button is inactive if there is no information in "Auth. info" for the heading.

11.3.2 Browse Buttons: Save As...

Use Save as Set to move results on the Browse list to the List of Sets on the Find node. Highlight one or more entries on the Browse list and select Save As Set. A pop up window appears where you can name the set, or simply confirm the default ID:

Save Browse Docs to List of Sets

Revised: June 3, 2011
11.3.3 **Browse Buttons: Correct Heading**

Correct Heading is used by authorized staff to make corrections to headings from the Browse list.

11.3.4 **Browse Buttons: Correct Display**

Correct Display is used by authorized staff to make corrections to the display text of a heading.

11.3.5 **Browse Buttons: AUT Recheck**

This button is not in use at Harvard.

11.3.6 **Browse Buttons: Show**

Select one or more entries on the Browse list and click Show. The selected records will open in the Show node with the Brief List in the upper pane and the full record displaying in the lower pane:

![Show Node from Browse List](image)

The sort order of records moved to the Brief List is the order in which they appear on the Browse List. Note that the Upper Window pane says that the list is NOT SORTED. This is not entirely true; the results are sorted, they are just not sorted using one of the Aleph standard sorts.

Revised: June 3, 2011
11.3.7 Browse Buttons: Brief Recs

Selecting Brief Recs for headings on the Authors, Series and Title indexes opens records in the Brief Recs tab on the Show node. The Brief Recs display presents all of the records for a heading in an ordered, or sub-arranged, view. For example, selecting Brief Recs for the Author Child, Julia opens an alphabetical list of all of the titles for which she is an author. Multiple publications of the same title are sorted by publication year.

Brief Recs Display

Brief Recs is inactive on all indexes except for Authors, Series and Title. Brief Recs is useful for displaying the works of prominent authors or series with multiple volumes.

- You can use Full Screen Mode (see Section 9.1) to make the Brief Recs display larger on your screen.
  - Save records on the Brief Recs list using Save As. This will add them to the List of Sets.
  - Print, email or save the records on your hard drive using Print/Send.
  - Move records from Brief Recs into My Records Tab by using My Records.
  - Move one record, a range of records or selected records into the Records tab using Catalog button.

Use Jump to move to a particular section of the list.

11.3.8 Browse Buttons: Catalog

Catalog moves records directly from the Browse List to the Records tab. As many as 100 records can be moved from the Browse list to the Records tab at one time. If moving more than 100 records, an error message will appear:

Too many records error message
12. Customizing the Aleph Display

You can customize the look and navigation of the Aleph client according to your needs.

12.1 Adding Keyboard Shortcuts

Most library units have created macros for common functions. Before adding keyboard equivalents, you may wish to ask about macros or other keyboard shortcuts already in use.

To add keyboard shortcuts for commonly used functions:
1. From the Menu bar, select ALEPH>Options>Customization menu.
2. Select the 2nd tab (Accel. Configuration).
3. Highlight the function in the left hand column.
4. Click or tab to the Hot Key field and type the keyboard equivalent you wish to use.
5. Click the Add button. If another function is already using the keyboard shortcut you selected, the system will tell you the function is using that keyboard shortcut.
6. Click the Assign button.

Once a keyboard shortcut is set, Aleph will add it to the drop down menu list in the Aleph client.

**Do not assign <Ctrl> + H or <Ctrl> + I:** These two keyboard shortcuts are used by the Windows system. If you assign either to a function in Aleph, you will see unstable results in your client.

**Current Limitations on Setting Keyboard Shortcuts:** You can set keyboard shortcuts for function keys and certain keyboard combinations such as <Ctrl> + <Shift> and <Alt>+<Shift>. Please note that <Ctrl>+<Alt> will NOT currently work in Aleph.
12.2 Selecting Custom Colors on Tabs

You can assign colors to specific tabs on the keyboard (note that you will see colors have already been chosen for tabs in the Circulation module):

1. Select the 3rd tab (Main Tab Configuration).

   ![Main Tab Configuration](image)

   *Main Tab Configuration*

2. Select the tab to be customized and click on the **Back Color** button. A window will open and you can select the color you want to assign the tab.

3. Click **OK**.

   **Search Tab:** Note that even if you set a color for the Search Tab in one module, that color choice will not appear on the Search Tab in other modules. Set the color in each module.

13. Printing in Aleph

   There are several print options in Aleph:

13.1 Print/Send buttons

   Records can be printed from the Search tab using the Print/Send buttons on the following screens:

   - Find Node: List of Sets
   - Show Node: Brief List, My Records, Brief Records
13.2 Using F11 to Print

Use F11 to print lists such as the Brief List and to print records in the Full+Link display. F11 can be used to print any display, in any module, that has gray and white horizontal bars.

- **Put the Pane in Focus**: Before pressing F11, make sure the screen to print is in focus.

- **Preview the List before Printing**: Change your Print Configuration to Preview to see a preview of what is to be printed. Click Print to print the list.

- **Exporting the Contents of a List Display**: Depending on the version of Windows you are using, you may also be able to export the contents of a list to an Excel spreadsheet.

**To Export to Excel:**

1. Right click on the Printer icon in the lower right and select Preview.
2. Highlight the entries to include in your list.
4. Right click on the Print Preview window. Select Export to Microsoft Excel from the list.
13.3 Using the Windows Print Menu or <Ctrl> + P

To print a screen with solid gray lines, such as any display in Overview Mode, right-click on the display and choose Print from the menu, or, if the window is in focus, use <Ctrl>+P. <Ctrl> + P can be used to print any display in Aleph that has solid gray lines.

![Item Display (display has solid gray horizontal lines)](image)

14. Logging Off of Aleph

There are three ways to exit an Aleph module: choose the ALEPH menu and select Exit from the menu; press <Alt> + A, then X or select the red Exit icon at the top right of the application. When you close a module, you will get the following dialog box:

![Exiting an Aleph module](image)

Click OK and the module will close.

In Cataloging, if there are unsaved records in the Records tab, the system will prompt you to save before closing the module.

14.1 How to Log Off of Aleph Completely in One Step

If you want to close ALL modules at once, click on the Exit icon on the Operations Bar at the bottom right of the screen.

In Cataloging, if there are unsaved records in the Records tab, the system will prompt you to save before closing the module.
15. Where to Get Help

The following resources are available to help you with the Aleph Library System at Harvard:

15.1 The Office for Information Systems

The mission of the Office for Information Systems (OIS) is to develop, maintain and support university-wide computer systems used in the libraries at Harvard. OIS provides staff support, training, documentation and other resources to all of the libraries using Aleph at Harvard University.

OIS staff configure the Aleph software for use at Harvard before it is distributed to Aleph IT Liaisons. OIS staff also work with libraries to develop reporting tools for use with Aleph, set up initial logins and passwords and provide front line staff support to the system.

15.1.1 University Information Systems

University Information Systems (UIS) is responsible for maintaining the hardware for the Aleph system, including the server that is accessed by staff when they log in to the system each day.

15.2 Harvard Aleph Public Web Site

The OIS web site has a section devoted to the Aleph Library System at http://hul.harvard.edu/ois/systems/aleph. Here you will find information on:

- Aleph Documentation
- Liaisons and Committees
- How to Participate in Aleph
- Software and Logins
- Data Loads (description and schedule of regular batch loads, Order Loader and EDI)
- Staff training resources
- Reporting & Statistics
- Access to the Aleph Support Center for questions and problems

15.3 Aleph Documentation

http://hul.harvard.edu/ois/support/docs-aleph-opac.html

The Aleph Documentation Center provides access to policy documents, how-tos and quick reference guides. The documentation site is broken down by functional area (e.g. indexing, serials, acquisitions, etc.) to make finding appropriate documentation easier. As new documents are added to the system, announcements about their availability are made to the HULINFO mailing list.

15.4 Liaisons and Committees

These are the regular and ad hoc groups with a role in steering or advising on Aleph system operations and developments.
15.4.1 Library Liaisons

Each library has a designated Aleph Liaison (two or more in the larger units) who is responsible for facilitating communications between OIS and their library. The Liaison submits login requests and occasionally assists with data collection in their unit related to Aleph participation.

15.4.2 IT Liaisons

Each library has an IT Liaison responsible for facilitating communication between OIS and the library related to Aleph desktop and network issues.

15.4.3 Advisory and Ad Hoc Teams

As of mid-2011, the structure and role of Aleph working groups is currently under review. Working groups have been discontinued pending further study.

15.5 The Aleph Support Center

http://hul.harvard.edu/ois/support/support-aleph.html

Problems or questions regarding Aleph should be submitted to the Aleph Support Center. When reporting a problem, select the appropriate functional area (e.g. Cataloging, Acquisitions, etc.) and enter information that will assist OIS to reproduce the problem – such as the steps leading up to the problem -- or identifiers that can be used to identify the records of concern. A staff member from OIS will review your question and respond directly to you.

Problems connecting to Aleph are considered critical and should be reported immediately to your local IT staff.

15.6 HULINFO Mailing List

HULINFO is the Harvard Library’s official method of electronic communication. HULINFO is used for dissemination of Harvard Library-related information, including committee minutes, administrative announcements, system status reports, the OIS Newsletter, etc. Subscription is limited to members of the Harvard community.

To subscribe, go to http://hul.harvard.edu/resources/hul_lists.html
Appendix 1: Keyboard Equivalents in Aleph

### Function Keys

<table>
<thead>
<tr>
<th>Function Key</th>
<th>Cataloging Module</th>
<th>Acquisitions Module</th>
<th>Circulation Module</th>
</tr>
</thead>
<tbody>
<tr>
<td>F1</td>
<td>Help or Visual Properties</td>
<td>Help or Visual Properties</td>
<td>Help or Visual Properties</td>
</tr>
<tr>
<td>F2</td>
<td>Records Tab</td>
<td>Order Tab</td>
<td>Not assigned</td>
</tr>
<tr>
<td>F3</td>
<td>Search Field Heading of Current Library</td>
<td>Not assigned</td>
<td>Reserve Items</td>
</tr>
<tr>
<td>F4</td>
<td>Search Subfield Heading of Current Library</td>
<td>Opens drop down menus</td>
<td>End Patron Session/ End Item Session/ End Loan Session/ End Return Session</td>
</tr>
<tr>
<td>F5</td>
<td>New Field (Choose from List)</td>
<td>Invoice Tab</td>
<td>Loan Tab</td>
</tr>
<tr>
<td>F6</td>
<td>New Field (User Specified)</td>
<td>Administration Tab</td>
<td>Return Tab</td>
</tr>
<tr>
<td>F7</td>
<td>Add subfield</td>
<td>Order Index Tab</td>
<td>Patron Tab</td>
</tr>
<tr>
<td>F8</td>
<td>Items Tab</td>
<td>Serials Tab</td>
<td>Items Tab</td>
</tr>
<tr>
<td>F9</td>
<td>Search Tab</td>
<td>Search Tab</td>
<td>Search Tab</td>
</tr>
<tr>
<td>F10</td>
<td>Not assigned</td>
<td>Not assigned</td>
<td>Not assigned</td>
</tr>
<tr>
<td>F11</td>
<td>Records Tab: Enter Unicode Mode</td>
<td>Items and Search Tabs: Print Lists</td>
<td>Print Lists</td>
</tr>
</tbody>
</table>

### <Ctrl>+ Keys

<table>
<thead>
<tr>
<th>&lt;Ctrl&gt; + Key</th>
<th>Cataloging Module</th>
<th>Acquisitions Module</th>
<th>Circulation Module</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;Ctrl&gt; + &lt;Tab&gt;</td>
<td>Move forward through window panes and bars</td>
<td>Move forward through window panes and bars</td>
<td>Move forward through window panes and bars</td>
</tr>
<tr>
<td>&lt;Ctrl&gt; + &lt;Alt&gt;+ &lt;Tab&gt;</td>
<td>Move backward through window panes and bars</td>
<td>Move backward through window panes and bars</td>
<td>Move backward through window panes and bars</td>
</tr>
<tr>
<td>&lt;Ctrl&gt; +1</td>
<td>Edit Navigation Pane</td>
<td>Navigation Pane</td>
<td>Navigation Pane</td>
</tr>
<tr>
<td>&lt;Ctrl&gt;+2</td>
<td>Upper Pane. If using Split Editor Mode in the Records Tab in Cataloging, places focus on the left hand side of the Upper Pane.</td>
<td>Upper Pane</td>
<td>Upper Pane</td>
</tr>
<tr>
<td>&lt;Ctrl&gt;++</td>
<td>Right hand side of Upper Pane when using Split Editor in the Records Tab.</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>&lt;Ctrl&gt;+3</td>
<td>Lower Pane</td>
<td>Lower Pane</td>
<td>Lower Pane</td>
</tr>
<tr>
<td>&lt;Ctrl&gt;+4</td>
<td>Record Manager Pane in Records Tab</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>&lt;Ctrl&gt;+5</td>
<td>Cataloging Bar</td>
<td>Serial Bar</td>
<td>Patron Bar</td>
</tr>
<tr>
<td>&lt;Ctrl&gt;+6</td>
<td>Items Bar</td>
<td>Order Bar</td>
<td>Items Bar</td>
</tr>
<tr>
<td>&lt;Ctrl&gt;+7</td>
<td>Not Assigned</td>
<td>Invoice Bar</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>&lt;Ctrl&gt;++ A</td>
<td>Open Template</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>&lt;Ctrl&gt;++ B</td>
<td>Split Editor Mode</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>&lt;Ctrl&gt;++ C</td>
<td>Copy</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>&lt;Ctrl&gt;++ D</td>
<td>Copy Record</td>
<td>Not Assigned</td>
<td>Delete Single Hold Request by Barcode</td>
</tr>
<tr>
<td>Key</td>
<td>Cataloging Module</td>
<td>Acquisitions Module</td>
<td>Circulation Module</td>
</tr>
<tr>
<td>-----------</td>
<td>-------------------</td>
<td>---------------------</td>
<td>--------------------</td>
</tr>
<tr>
<td>&lt;Ctrl &gt;+ E</td>
<td>Expand from Template</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>&lt;Ctrl &gt;+ F</td>
<td>Open Form</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>&lt;Ctrl &gt;+ G</td>
<td>Help on Field</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>&lt;Ctrl &gt;+ H</td>
<td>CANNOT USE</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>&lt;Ctrl &gt;+ I</td>
<td>CANNOT USE Windows Function</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>&lt;Ctrl &gt;+ J</td>
<td>Full Screen Mode</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>&lt;Ctrl &gt;+ K</td>
<td>Activate Keyboard</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>&lt;Ctrl &gt;+ L</td>
<td>Close Record</td>
<td>Not Assigned</td>
<td>Print Letter-Hold Request Filled</td>
</tr>
<tr>
<td>&lt;Ctrl &gt;+ M</td>
<td>Sort Record</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>&lt;Ctrl &gt;+ N</td>
<td>Duplicate Record</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>&lt;Ctrl &gt;+ O</td>
<td>Open HOL List</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>&lt;Ctrl &gt;+ P</td>
<td>Print</td>
<td>Not Assigned</td>
<td>Create Photocopy Request</td>
</tr>
<tr>
<td>&lt;Ctrl &gt;+ Q</td>
<td>Overview Tree</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>&lt;Ctrl &gt;+ R</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
<td>Create Hold Request</td>
</tr>
<tr>
<td>&lt;Ctrl &gt;+ S</td>
<td>Copy Subfield</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>&lt;Ctrl &gt;+ T</td>
<td>Copy Field(s)</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>&lt;Ctrl &gt;+ U</td>
<td>Check Record</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>&lt;Ctrl &gt;+ V</td>
<td>Paste</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>&lt;Ctrl &gt;+ W</td>
<td>Check Field</td>
<td>Not Assigned</td>
<td>Print Letter-Hold Request Not Filled</td>
</tr>
<tr>
<td>&lt;Ctrl &gt;+ X</td>
<td>Cut</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>&lt;Ctrl &gt;+ Y</td>
<td>Redo</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>&lt;Ctrl &gt;+ Z</td>
<td>Undo</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>&lt;Ctrl&gt; + F3</td>
<td>Search Field Heading of Other Library</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>&lt;Ctrl&gt; + F4</td>
<td>Search Subfield Heading of Other Library</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>&lt;Ctrl&gt; + F5</td>
<td>Cut Field</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>&lt;Ctrl&gt; + F7</td>
<td>Cut Subfield</td>
<td>Not Assigned</td>
<td>New Patron</td>
</tr>
<tr>
<td>&lt;Ctrl&gt; + F8</td>
<td>Search Subfield Options</td>
<td>Not Assigned</td>
<td>Catalog Record and Create Item</td>
</tr>
<tr>
<td>&lt;Ctrl&gt; + F10</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
<td>Duplicate Patron</td>
</tr>
<tr>
<td>&lt;Ctrl&gt; + F11</td>
<td>Enter Text Mode</td>
<td>Not Assigned</td>
<td>Delete Patron</td>
</tr>
<tr>
<td>&lt;Ctrl&gt; + F12</td>
<td>Enter Text Mode</td>
<td>Not Assigned</td>
<td>Not Assigned</td>
</tr>
</tbody>
</table>
# Navigation Pane Keyboard Equivalents

<table>
<thead>
<tr>
<th>&lt;Ctrl&gt; + &lt;Alt&gt; + Letter/Number</th>
<th>Cataloging Module</th>
<th>Acquisitions Module</th>
<th>Circulation Module</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;Ctrl&gt; + &lt;Alt&gt; + 1</td>
<td>Functional Mode</td>
<td>Functional Mode</td>
<td>Functional Mode</td>
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