

ELOQUENT SYSTEMS INC

Eloquent Librarian™ Planning Guide

Volume EL2 – Cataloging and Digital Content



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This manual is designed to guide you in planning the implementation of Eloquent Librarian software as well as for reviewing at any time you are ready to start using additional features. This volume of the Planning Guide prepares you to input all the data and content that becomes available to your clients on your online catalog/digital library.

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Introduction to the Guide

Who should read this guide?

The Planning Guide is for anyone preparing to use the Eloquent Librarian software. It provides a good overview of the system. With that knowledge you know what menu items to use for any function. You can then rely on the online HELP for each item on your menu and for every entry prompt on all the web forms.

When should it be read?

The entire volume should be read prior to implementing the software or getting any training from Eloquent. Your request for training can be more specific. You understand the options available and can plan for custom tailoring to better fit the workflow in your organization.

You should read specific sections again after a few months of operation – when you are ready to start implementing features that were not essential at the start. Any new employee should read the relevant volumes and sections prior to being trained.

Where else can I get help?

You also can take advantage of the following support provided by Eloquent Systems:

- [Tutorials](#) available on the Eloquent Website,
- You may log in as a Read-only User to access all the same menu items, but with the safety of not having the ability to add/modify any data.
- Just-in-time [remote training](#) for coaching on each new component as soon as you are ready to use it, and
- [Hotline support](#) after the system is installed and in operation.
- A few hours of [Professional Services](#) are free for the implementation and training for each new application or module. Additional hours may be purchased for data migration or for extensive custom tailoring.

What volumes are specific to the Eloquent Librarian application?

1. Volume EL1 - Public Access
2. Volume EL2 - Cataloging and Digital Content
3. Volume EL3 - Circulation, Advance Booking, Inventory & Fines
4. Volume EL4 - Serials Management, Issues & Article Cataloging
5. Volume EL5 - Acquisitions & Budgeting

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What volumes apply to all WebSuite applications?

1. Volume WS1 - Administrator Functions
2. Volume WS2 - Managing Authority Files
3. Volume WS3 - Structuring Data for Output
4. Volume WS4 - Pointers, Hierarchies & Hyperlinks

What is this volume about?

Volume EL2 of the Planning Guide prepares you for inputting all the data and content so that it becomes available to your public in your online catalog/digital library as illustrated in Volume 1. You are told what the options are and what to do next to implement your choices.

Most of the function described in this volume is part of the base component of Eloquent Librarian. Two additional modules are fully described because they involve loading the metadata:

1. **MARC Import Module** – to load MARC records available for many sources.
2. **Journal Cataloging Module** – to manually add volumes, issues, and articles into the database.

Other modules are referenced because they influence decisions regarding the building of the database:

1. **Circulation Module** – influences creation of copy records.
2. **Serials Module** – influences creation of volume, issue and copy records.

Reference is made to three valuable sources of information that are easily integrated as a seamless component of your online catalog and digital library:

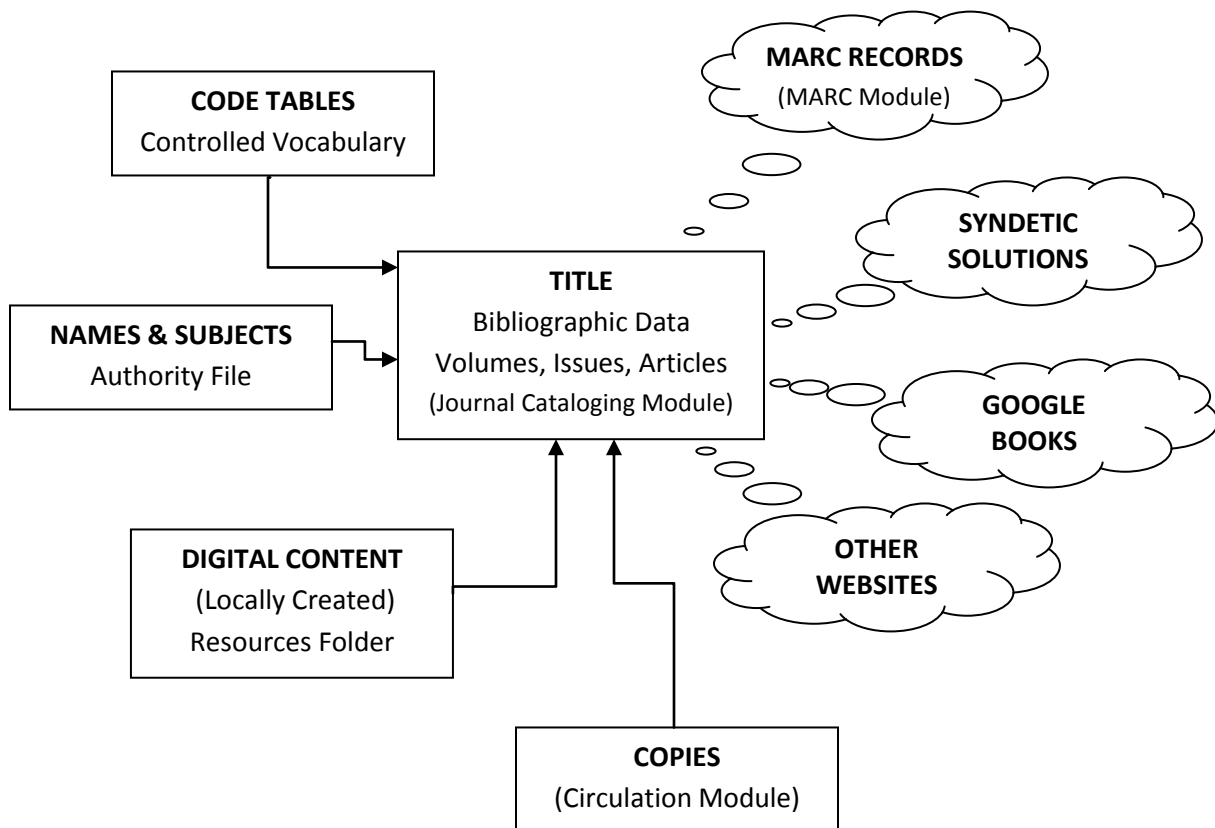
1. [WebClarity Software Inc.](#) – for BookWhere, a software package that allows the user to search hundreds of library databases via the Internet and capture MARC records using the Z39.50 protocol.
2. [Syndetic Solutions™](#) – a subscription service for a wealth of OPAC enrichment options relating to all types of books from juvenile chapter books to conference proceedings as well as videos, DVDs, CDs, and audio books.
3. [Google Books](#) – a free source of rich resources including the entire text of over 7 million books. You catalog the book, including the ISBN; the Eloquent link takes you to the text.

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The Database Structure

Volume EL1 illustrated all the valuable information available to anyone searching your Eloquent Librarian database. This diagram illustrates where all the data is stored and Volume EL2 tells you how to build the knowledge base.



Bibliographic Data – (online catalog)

Can I salvage data from a legacy system?

Yes, Eloquent Professional Services team can help you with the data migration process if you wish to use legacy data. Contact them for an estimate and a project plan. Even if they are not high-quality MARC records you get off to a quick start with them and still have the option to use MARC records in the future. They easily co-exist.

Can I build the database with MARC records?

If you already have a source of MARC records for your retrospective conversion you can either purchase the MARC module and import them yourself or have Eloquent load them. If you plan to use MARC for your new cataloging you need to purchase the module.

If some of your retrospective titles are available in MARC but need to be entered manually, it is best to load the MARC first. That process will populate your authority file with many of the authors and subjects.

You can download MARC records from a variety of sources. You can contact WebClarity Software Inc as a good commercial source. Their BookWhere software is an excellent Z39.50 federated search tool.

After downloading MARC records from any source you import them into Eloquent Librarian. Go to **MARC Import** -> **Import MARC records** and follow the online instructions.

Note: Prior to importing any MARC records you should have Eloquent show you how to go into the system as Administrator to ensure that the MARC mapping is appropriate for you. Otherwise, you may not be getting the appropriate call number for local use or may be missing some desired fields of data.

Can I manually enter MARC-quality records?

Yes, you may use any of the three menu options identified in **Diagram 1**. Titles entered with any of them will co-exist with any MARC records you may import. They can also be exported in a format that can be imported as MARC.

You may choose to remove any menu item that is not going to be used. If **Catalog titles – basic** is not appropriate for your requirements you can custom tailor **Catalog titles – custom** and use it. It is configured so that it will not be replaced with a configuration upgrade of your Eloquent Librarian.

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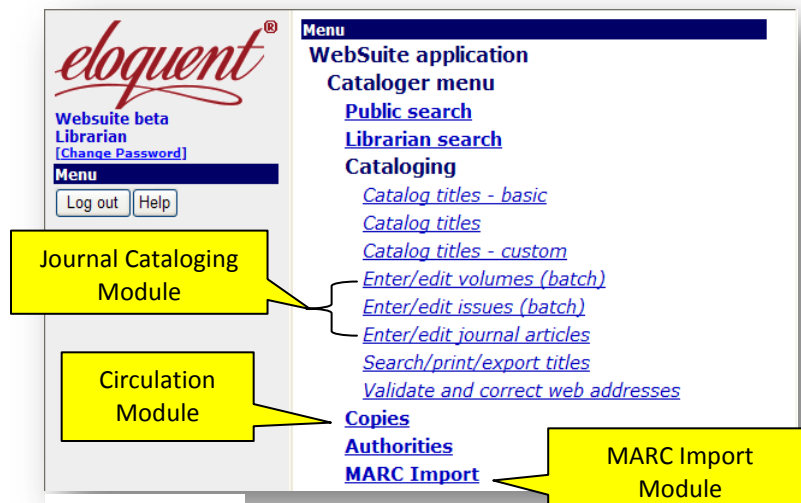


Diagram 1

What custom changes can be made to the “Catalog titles – custom”?

Changes that can be made to **Catalog titles- custom** are vast. You can make alterations to the headings of the fields; change the Default values from ‘No’ to ‘Yes’ or vice versa; modify the order in which the fields are presented on the screen; add fields and/or remove fields.

It is possible to edit the HELP text as well as alter the labels of fields on your own; but if you would like the help of our Professional Services team please contact us. An efficient screen will save you a lot of time over the years.

Do I require MARC-quality for all my titles?

No, for resources such as locally published documents and relevant websites you will not have data for many of the prompts, as long as you have the data to support searching and patron use. You will still be able to export them for MARC communication.

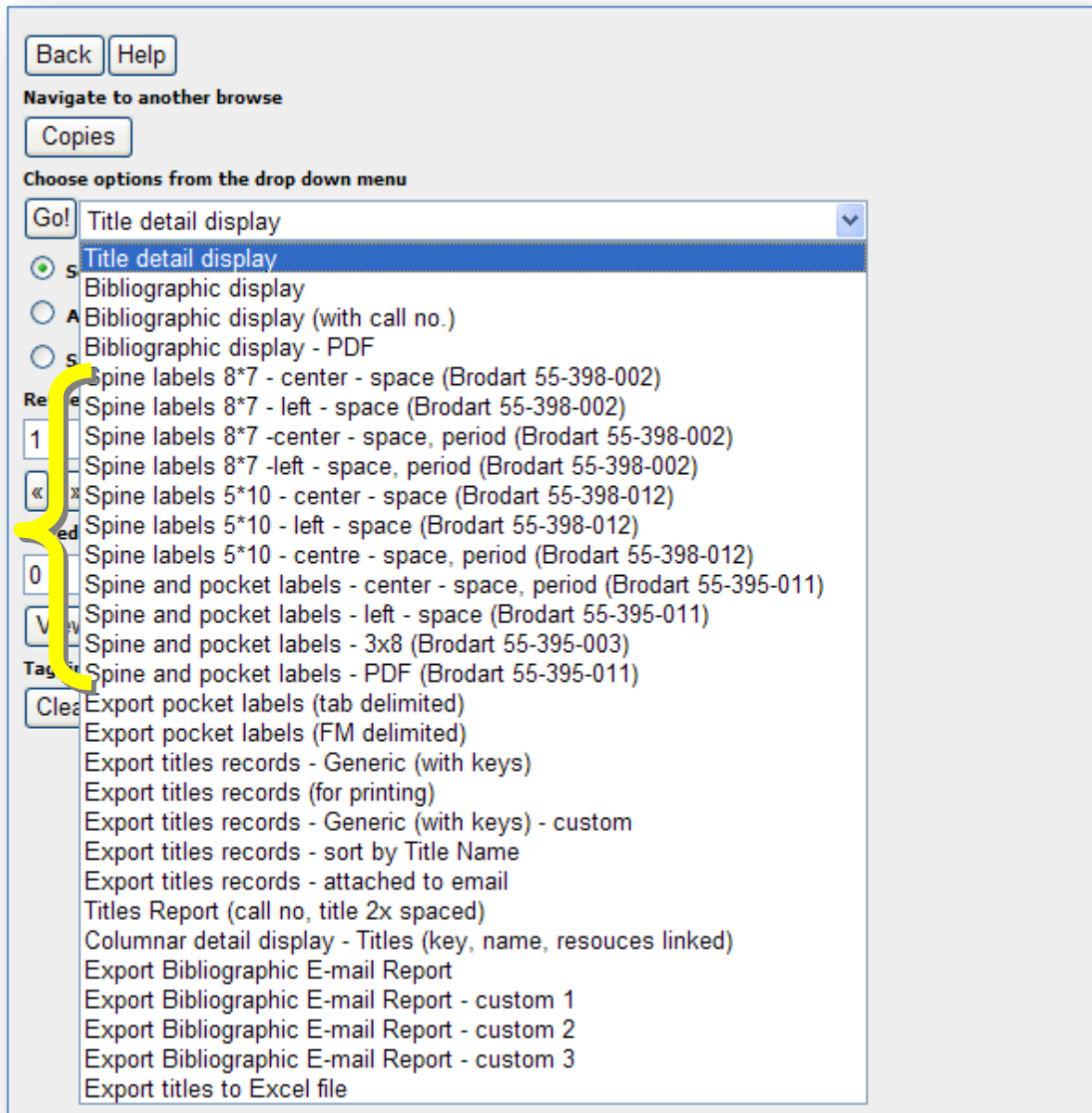
How do I personalize the various Code Tables?

The options found in dropdowns for prompts such as ‘Material type’, ‘Language of resource’, or ‘Reading level’ are in tables managed by the Administrator. The procedure is explained in the “Administrator function” volume.

Elements may also be added to these tables during an import process if the incoming record contains a term not already there.

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How do I manage the Authority File of Names and Subjects?

Title records do not contain the subjects and proper names. They simply point (link) to ones that may already exist in the Authority file. If they do not exist they are created on-the-fly as new titles are entered, either as a batch import or by manual entry.

When manually entering titles it is important to first search by using the “Find” button to ensure you do not create a redundant entry.

If you have legacy data to import for your retrospective conversion, the process will populate the authority file with names and topical subjects that are used later for manual cataloging. If you are creating a database from scratch manually, it may be desirable to pre-enter most of your authority records to ensure a controlled vocabulary. For that you will go to *Cataloging* -> *Authorities* -> *Enter/edit authorities*.

Information about fully utilizing the power in the authority file can be found in Volume WS2 – Managing authority files. It includes a process you may require to clean up newly imported legacy data. If it was created with no vocabulary control you may find multiple authority terms for the same name of topical subject. There is an Eloquent utility to delete all the redundant terms and re-link all the titles to the desired term.

Copy Records – (physical items)

Do I require copy records in order to produce spine labels?

No, you can select a set of newly purchased titles and send them to a process that will print spine labels on standard 8.5” x 11” label stock. The process makes efficient use of labels. If only a partial sheet is used the remainder can be used for the next process.

Go to *Cataloging* -> *Search/print/export titles* menu item and follow the online instructions. Diagram 2 illustrates the wide choice of output available.

Can I produce multiple copy records for a single title?

If you have the Circulation Module installed a very efficient process is available. It uses the copy record to easily process multiple copies of any title. It also manages additional newly purchased copies of an old title. This is discussed further in Volume EL3.

In the cataloging entry form for a title record there is a field to accept the number of new copies to be processed. An automatic process in the Circulation Module then generates the copy records. You can enter the appropriate number here in preparation for that process.

Can I produce multiple copy records for each journal issue?

Yes, but you require either the Circulation or the Serials module. The process is discussed in the respective volume.

Digital Content – (digital library)

How do I link to the rich resources from Syndetic Solutions?

The process is automatic if your title record has a valid ISBN and there is a match in the Syndetics database. To set up the process you first contact Syndetic Solutions to become a subscriber. Then you contact Eloquent with the appropriate information about your subscription to be incorporated into the software. (Note: *If Eloquent hosts your system the Syndetic link is automatically installed.*)

How do I link to the free electronic versions of Google Books?

Google Books works on the ISBN the same way as Syndetic Solutions. It is available free with the latest version of Eloquent Librarian. In addition to enriched information about the title, the entire electronic text is available for over 7 million titles of books, journals and other digital resources.

Can I make Google Books a valuable extension of my library?

Yes, for the titles you already have you get the image of the book cover and all the other enrichment material. In addition, you can catalog any number of their 7 million titles that are relevant to your patrons and make the electronic versions available to them. They are free.

Can I add my own scanned book cover?

Yes, you simply browse and attach the book cover file. You may have found it on the Internet or scanned it yourself. Notice the Browse button on **Diagram 3** below. It works just like attaching an image to your email.

What other rich resources can I add myself?

As you can see from the fields under the Hyperlinks Section on **Diagram 3**, there are a number of resources you can add to your library titles. Along with cover images, you can add different types of digital content, including, but not limited to, PDF, Word files, pictures, audio, PowerPoint presentations, Excel spreadsheets, etc.

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The screenshot shows the 'Hyperlinks' section of the Eloquent Librarian interface. It includes a 'Web Address' field with an 'Edit' button, a 'Cover Image' field with an 'Edit' button, and an 'Attached file' field with a 'Browse...' button. Below these is a table titled 'Attached Files' with columns for 'Name Displayed', 'File Name', 'Attached file', and 'Content'. The table has three rows, each with 'Edit', 'Browse...', 'Edit', and 'Do it' buttons. Yellow callout boxes are placed over the 'Web Address' field (labeled 'Cataloged Web Site'), the 'Cover Image' field (labeled 'Cover Image'), the 'Attached file' field (labeled 'Attached file'), and the 'Attached file' column of the table (labeled 'Other Objects').

Diagram 3

How do I include internally published manuals & pamphlets?

With internally published manuals and pamphlets, you manually catalog them as you would other titles. If the appropriate “Material Type” is not in the dropdown, you can log in as Administrator to modify the table.

How do I link to relevant websites?

Web links are very simple to manage on Eloquent Librarian so be sure to catalog any websites you find on the Internet that are relevant to your clients. Enter or copy/paste the URL into the prompt shown in **Diagram 3**.

Can I deal with the problem of broken links?

Yes, go to **Cataloging** -> **Validate and correct web addresses** and follow the online instructions.

You may find that the site is temporarily down so there is nothing to fix, it has a new URL so you change it, or it is no longer available so you delete the title record altogether.

Journal volumes, issues & articles

Do I need the Serials Module to enter all my journal issues?

No, you can manually enter your journal issues. However, if serials are a large component of your collection, and you have subscriptions and vendor orders to deal with, then you should consider acquiring the Serials Module.

For manual entry: first you must catalog a journal as you would with other titles - to establish a parent for the volumes. Set the 'Material type' as Journal. Then if you have a set of issues in hand you go directly to **Cataloging -> Enter/edit issues (batch)** and follow the online instructions. If the parent volume does not exist use the **Create** button to create it.

The **Issue number** prompt accepts only numeric data. The automatic generation of issues by the Serial Module enters numbers starting at "1". It is used by the system for sorting prior to display. Alpha numeric information such as "January/February" can be entered in the **Issue Call number field**.

	Issue Call number ?	Issue number ?
1	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>
6	<input type="text"/>	<input type="text"/>
7	<input type="text"/>	<input type="text"/>
8	<input type="text"/>	<input type="text"/>

Diagram 4

Can I enter all the volumes prior to entering issues?

Yes, go to **Cataloging -> Enter/edit volumes (batch)**.

Will I be able to circulate individual issue copies?

Yes, but you require the Circulation Module. It is discussed in EL3.

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How do I catalog individual articles?

Go to **Cataloging** -> **Enter/edit journal articles** and follow the online instructions.

The article can be fully cataloged so it can be searched and displayed along with books and other resources. If you have a PDF copy of the article, or have located an online link to it, you can also attach that with the article information. The entry window should be custom tailored to contain only the prompts you intend to use.