

Cataloguing Configuration Questionnaire – Customer Reply Form

Instructions: This form is numbered to reflect the corresponding sections in the word document. Please review those sections for further instructions on completing this form.

1 Customer information			
Institution Name:			Date:
	Last	First	M.I.
Contact Name:			
Address:			
City			State ZIP Code
Phone:	()	E-mail Address:	

2 Bibliographic record fields [xxx01/pc_tab/Catalogue/codes.eng]			
Do you need additional local (NON-MARC) fields? Complete the following chart:			
Tag	Field name	Subfields	Fixed values

3 Cataloguing checks [xxx01/tab/check_doc.eng and check_doc_doc]			
Cataloguing checks have been set up for MARC 21. We recommend that you start to use the system before you determine if you require any modifications of this setup. If you have defined some local fields, you can also define checks for them. Complete the following chart:			
Field	Check Level	Check	Check Alert

4 Cataloguing authorisations	
4.2 Cataloguing levels [xxx01/tab/pc_tab_exp_field.eng (LEVEL)]	
Do you need to define Cataloguing levels? Would you like to change the default levels? (You may not require so many levels or may want to call the levels by another name. If you do, complete the following table:	
Level	Level code

4.3 Cataloguing authorisations at the field level (additional option)
 [xxx01/pc_tab/Catalog/permission.dat]

User Name	Field	Allowed/Denied
MASTER	6####	Allowed

4.4 Cataloguing authorisations in a shared bibliographic library – the OWN functionality (additional option) [xxx01/tab/tab_own]

If you require this functionality, list the groups you would like to define and the groups' matching OWN field code in the following table:

Group name	OWN code (up to 10 chars.)

In addition, indicate which Cataloguers need to work with which groups (permitted groups) and the Cataloguer's default OWN code. You can refer to individual staff members or to staff roles (for example, Cataloguers from the Music Cataloguing department).

Staff Role	Default OWN Code	Permitted OWN Codes

5. Holdings Records

Do you want to create Holdings records for all Bibliographic items?	YES	NO
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5.1 The 852 field [xxx60/tab/tab100 (CREATE-852-HOL)]

Would you like the system to automatically create the call number when a holdings record is created?	YES	NO
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5.2 Holdings records and the Own functionality [xxx60/tab/tab_own]

If you require this functionality, list the groups you would like to define and the groups' matching OWN field code in the following table.

Group name	OWN code (up to 10 chars.)	

In addition, indicate which Cataloguers need to work with which groups (permitted groups) and the Cataloguer's default OWN code. You can refer to individual staff members or to staff roles (for example, Cataloguers from the Music Cataloguing department).

Staff Role	Default OWN Code	Permitted OWN Codes

5.3 Holding Language – 008 (additional option)

[xxx60/tab/tab100 (HOL-008-LING)]

Do you want the system to automatically copy the default language from the language defined in the bibliographic record?	YES	NO	

7 Items
7.1 Item processing status [xxx50/tab/tab15.eng, pc_tab_exp_field.eng (ITEM-PROCESS-STATUS)]

Do you have additional item processing statuses in your library? If so alert your implementation librarian that updates have been made. Translation maps for conversion migration may also be required.	YES	NO
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7.2. Item material types [xxx01/tab/tab25.eng]

Do you have additional material types in your library? If so alert your implementation librarian that updates have been made. The material types "ISSUE" and ISSBD" should not be changed or deleted as they are the basis for specialized issue sort procedures. Translation maps for conversion migration may also be required.	YES	NO
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7.4. Item barcodes [xxx50/util g/2]

Would you like to change the default to create barcodes from a system counter?	YES	NO	
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7.5. Item inventory numbers (additional functionality) [xxx50/util g/2]

Would you like the system to automatically generate an inventory number based on counters?	YES	NO	
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If you answered Yes, describe the structure of the inventory numbers you need here:

8 Importing records

Which methods are you planning to use? Describe if applicable here:

9. Special projects relating to authority / bibliographic records

Please indicate if you have decided to undertake any special projects relating to your authority and/or bibliographic records before/during/after your ALEPH implementation. For example, sending records out for authority maintenance, or moving large groups of bibliographic records from one location to another. Describe if applicable here: