BLUEcloud Cataloging
Training Guide
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Introduction

Training Overview

Intended Audience

This guide is intended for those users who will use BLUEcloud Cataloging.

Prerequisite

It is useful to understand basic cataloging concepts before using BLUEcloud Cataloging.

Goals

After completing this guide and/or the corresponding course, staff will know how to:

- Search multiple targets
- Edit bibliographic data manually, using the MARC Editor
- Edit bibliographic data using shortcuts/drag and drop
- Update/Improve bibliographic records by merging or overlaying from other databases
- Create/Edit call number and item/copy records

Getting Connected

Access information to your particular BLUEcloud Cataloging installation will not be provided during training. Your Site Administrator should receive the following information from your SirsiDynix Project Manager or Customer Support:

- URL for your instance of BLUEcloud Central
- Delivered Administrator login and password

If you are the Site Administrator, change the administrator password as soon as you receive it. If you are not the Site Administrator, you may need to wait for users to be created and access rights to be assigned before accessing BLUEcloud Cataloging.
BLUEcloud Cataloging Overview

BLUEcloud Cataloging is a multi-tenant cataloging solution that will help improve the quality and efficiency of cataloging. It is a lean web-based cataloging client that creates an efficient workflow. BLUEcloud Cataloging enables users to compare existing records against records available from other sources via Z39.50 connections, such as Library of Congress and BLUEcloud MARC. Staff members can quickly and easily copy fields, merge new data into the existing record or completely overlay existing bibliographic records. Managing holdings is also easy to do, without having to jump around to find the correct record or tool. Everything is readily available, no matter where you are in BLUEcloud Cataloging.
Symphony/Horizon Setup

Before staff can use BLUEcloud Cataloging the following setup must be completed. It is likely that this was completed for you, by SirsiDynix or your system administrator.

1. Your ILS must be updated to the appropriate release.
   a. Horizon 7.5.2 or newer
   b. Symphony 3.4.1 SP5 or newer

2. Within your ILS, you must link your cataloging staff user record(s) to the BLUEcloud staff ID(s).

   To link your BLUEcloud Staff ID with your ILS user
   1. Ensure that the field is available in your user records. You may need to activate the field in the properties, first.
   2. Fill in the BLUEcloud Staff ID field, with the corresponding BLUEcloud Username.
      a. In Symphony, this is in the Privileges tab of the User record.
b. In Horizon, this is in the Settings tab, within the staff member’s security record.

![Settings Tab Screenshot]

**NOTE:** Learn about BLUEcloud usernames in the [BLUEcloud Central section of this guide](#).

**Web Services**

Your Web Services must be updated to the latest version.

BLUEcloud Search Service must be enabled within your BLUEcloud Central. This requires that a BLUEcloud Search Service ILS Agent be installed on your ILS server. If this has not already been put in place, contact Customer Support. See the BLUEcloud Search Service guide to learn more about setting up your search policies.
Finding Titles and Copies

Staff can edit bibliographic and holdings data within BLUEcloud Cataloging. This section will discuss how to locate the title/holdings to be modified.

To Find a Title

1. Log in to BLUEcloud Central.

2. Open the Staff menu.

3. Select Cataloging > Search.

4. Type your search term into the empty field.

5. Select the Search Targets you wish to search. This may be all at once, or a particular Target.

**NOTE:** If you wish to edit, select your library as the Target. Selecting an outside target, such as Library of Congress will give the option to update existing records, but not edit remote titles.

6. Depending on the Target selected, you will then have the option to select an index to filter by.

7. Once you have the settings necessary to complete your search, click the **magnifying glass** button, to the right, or hit Enter.
**Filtering the Results**

Depending on how specific your initial search was, you may wish to further filter your results list. This can be done using the facets icon.

*To filter your search results*

1. Click the facets icon, next to the search fields, at the top of the screen.

2. Select the desired limits.

3. As you make selections, your results will change. The available limits will also change, based on your selections (shown below).

4. Click back on the facet to undo your selections. Or You can close the limit menu by clicking the icon again.
Editing Bibliographic Data

BLUEcloud Cataloging enables staff to quickly and easily update bibliographic data manually or by merging or overlaying titles using other targets, such as Library of Congress or BLUEcloud MARC.

**Manual Bibliographic Editing**

You can simply type the changes you desire or you can use keyboard shortcuts and expanded views of leader and control fields.

![Image of BiblioTab interface]

**To Edit Bibliographic Records**

1. Click on the Title you wish to edit.
2. Click in the field you wish to edit.
3. Type the appropriate information.
4. Reorder fields by clicking/dragging the icon, to the right of the field. Or, by clicking Alt + O on your keyboard.
5. Delete fields by clicking the X icon to the right of the field.
6. Click **Save**.

**Shortcuts & Expanded Views**

If you need a little assistance remembering which field or subfield is used in a particular situation, BLUEcloud Cataloging provides a few great tools.

**Lists**

- **+ New Field**
  - At the bottom of your record, click “+ New Field” to access a list of options.

- Click the Delta, to the left of each field, to use the expanded view. This will provide the option to add a new subfield, from a pre-defined list.
Shortcuts

There are a number of keyboard shortcuts built into BLUEcloud Cataloging. As the product grows, these options may as well. Be sure to check your BLUEcloud helps for the most recent list.

**General MARC Editor Shortcut Keys**

<table>
<thead>
<tr>
<th>Key Combination</th>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tab</td>
<td>Next field/subfield</td>
<td>Press Tab to move to the next area of a field, or to the next subfield of a field.</td>
</tr>
<tr>
<td>Shift+Tab</td>
<td>Previous field/subfield</td>
<td>Press Shift+Tab to move to the previous field.</td>
</tr>
<tr>
<td>Up Arrow</td>
<td>Move to area above</td>
<td>Press the Up Arrow to move to the area above.</td>
</tr>
<tr>
<td>Down Arrow</td>
<td>Move to area below</td>
<td>Press the Down Arrow to move to the area below.</td>
</tr>
<tr>
<td>Ctrl+ ]</td>
<td>Expand/collapse field</td>
<td>Press Ctrl+ ] to expand or collapse the subfields for a field.</td>
</tr>
<tr>
<td>Ctrl + Shift + ]</td>
<td>Expand/collapse control data</td>
<td>Press Ctrl+Shift+ ] to expand/collapse the Control Data.</td>
</tr>
<tr>
<td>Enter</td>
<td>Insert field/subfield after</td>
<td>Press Enter while editing any tag, indicator, or collapsed subfield to create a new field. A new subfield will be created if you are editing the subfield of a field which has been expanded. The new field or subfield is inserted into the MARC record after the area that you are editing.</td>
</tr>
<tr>
<td>Shift+Enter</td>
<td>Insert field/subfield before</td>
<td>Press Shift+Enter while editing any tag, indicator, or collapsed subfield to create a new field. A new subfield will be created if you are editing the subfield of a field which has been expanded. The new field or subfield is inserted before the area that you are editing.</td>
</tr>
<tr>
<td>Ctrl+ \</td>
<td>Insert subfield delimiter</td>
<td>Press Ctrl+\ while editing a subfield to insert a new delimiter into that subfield.</td>
</tr>
<tr>
<td>Ctrl+Enter</td>
<td>Append field/subfield</td>
<td>Press Ctrl+Enter to append a field/subfield from one MARC record to another.</td>
</tr>
<tr>
<td>Alt + O</td>
<td>Sort fields numerically</td>
<td>Press Alt+O to sort all fields for the current MARC record numerically. Note: Fields with a 596 tag will be moved to the bottom of the record by default.</td>
</tr>
<tr>
<td>Ctrl + Spacebar</td>
<td>Open MARC field/subfield helper</td>
<td>Press Ctrl+Spacebar to open the New Field/Subfield MARC Tag Helper. For more information on the MARC Tag Helper, see Fields: MARC Editor.</td>
</tr>
<tr>
<td>Ctrl + Shift + /</td>
<td>Start new cataloging search</td>
<td>Press Ctrl+Shift+/ to start a new cataloging search.</td>
</tr>
<tr>
<td>Ctrl + /</td>
<td>Move text cursor to search box</td>
<td>Press Ctrl+/ to move your text cursor to the search box.</td>
</tr>
</tbody>
</table>
### Key Combination

<table>
<thead>
<tr>
<th>Key Combination</th>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>F</td>
<td>Display search facets</td>
<td>Press F to open the facets tab to filter search results.</td>
</tr>
</tbody>
</table>

#### Side by Side View Specific Shortcut Keys

<table>
<thead>
<tr>
<th>Key Combination</th>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ctrl+Left/Right</td>
<td>Switch to previous/next z39.50 search target</td>
<td>Press Ctrl+Left/Right to switch between z39.50 search targets for the z39.50 Records pane.</td>
</tr>
<tr>
<td>Ctrl+Up/Down</td>
<td>Switch to previous/next z39.50 record</td>
<td>Press Ctrl+Up/Down to display the next z39.50 record in the z39.50 Records pane.</td>
</tr>
<tr>
<td>Ctrl+Shift+Left/Right</td>
<td>Switch to previous/next ILS target.</td>
<td>Press Ctrl+Shift+Left/Right to switch between ILS targets for the ILS Records pane.</td>
</tr>
<tr>
<td>Ctrl+Shift+Up/Down</td>
<td>Switch to previous/next ILS record</td>
<td>Press Ctrl+Shift+Up/Down display the next ILS record in the ILS Records pane.</td>
</tr>
</tbody>
</table>

At the very bottom of the record, the selected field will display with a help icon to the right. Click this icon to access RDA Toolkit (only available if you have a subscription) or the Library of Congress website for further assistance.

**To Delete a Bibliographic record**

1. Locate the title you wish to delete.
2. Click on the title.
3. Click **Delete**.

**NOTE**: This requires that you have the appropriate permissions. For example, you may not have Permission to delete titles with attached holdings.
**Smart Search**

The Smart Search button, next to “Save” automatically searches the Z39.50 search targets that have been made available for this same record, using fields in the existing source record. This enables staff to compare records, add tags from the other record, merge the records or replace the existing record with the new one.
The Book River

By default, the titles available in your hit list display in the book river, above your bibliographic record. The titles available in your z39.50 connections will display above that record, but in list form. If you would prefer to view the titles in a list view, click the icon to the right of the titles. Switch to the cover art view by clicking the icon. You may exit this view at any time, by clicking the “Return to Histlist” button at the top left of the window.

Drag & Drop Fields

Now that your original record is side-by-side with another, you can compare your records and choose drag and drop tags from the Z39.50 record into your original record. You may also simply click the icon to send that tag to your record.

To Drag a Field into the Original Record

1. Click the icon to the right of the field you wish to copy; and hold your mouse down.

2. Drag the field to the desired location in your original record.

3. Let go of the mouse.

4. The new field will be highlighted. If you change your mind, click the Revert button at the bottom of the record.

5. To keep your changes (and see them immediately), click Save.
Merging Records

Now that you have your original record side-by-side with another, you can compare your records and choose to merge them. When you click “Merge” all of the data that is in the record to the right (from your Z39.50 source) that does not already exist in the record to the left, as an exact match, will be added into your original record.

**NOTE:** How the data merges will be affected by any Merge and Replace policy settings.

**To Merge Records**

1. Click the **Merge All** button under the right record (Z39.50).

2. The new/updated fields will be highlighted. If you change your mind, click the **Revert** button at the bottom of the record.

3. To keep your changes, click **Save**.
Replacing Records

Now that you have your original record is side-by-side with another, you can compare your records and choose to completely replace your original, with the record on the right (from your Z39.50 source).

*NOTE: How the data is replaced will be affected by any Merge and Replace policy settings.*

**To Replace the Original Record**

1. Click the Replace button under the record to the right (Z39.50 record).
2. If you change your mind, click the **Revert** button at the bottom of the record.
3. To keep your changes, click **Save**.
Manage Holdings

BLUEcloud Cataloging makes working with call numbers and items/copies simple. You can access holdings using the “Manage Holdings” button from within titles, or from the hit list by selecting the title and selecting “Manage Holdings”. Once you are looking at your holdings, you can change from the default view of your call number/volume data, to a copy list using the icons at the top of the list.

Default View (Call Number/Volume)

Copy/Item View
From this view you can also filter your items, using the “Manage Holdings Facet” icon.
To edit copy data

1. Click on the copy you wish to edit.

   NOTE: You can switch between copies in the “holdings tree” (list to the left).

2. Enter the appropriate information into each field.

3. Click “Save”.

To create a new copy under the selected call number

1. Click “New Item”.

2. Enter the appropriate information into each field.

3. Click “Create”.

   NOTE: If you have a copy selected, when you click the New Item button, it will copy all data from that copy to the new copy (except barcode).

   NOTE: Typing “AUTO” will auto-generate a barcode or Call Number (as appropriate).

To create a new call number

1. Click “New Call Number” (left side).

2. Enter the appropriate information into each field.

3. Click “Create”.
Call Number

Call Number Information

Class Scheme

Call Number

Shelving Key

Volumetric

Shadow Call Number

Call Library

Call Number/Copy

SirsIDynix
To Batch Create Items

1. From the Item Editing view, change to the list view, by clicking the list icon.
2. Once in the list view, click on the item you wish to create these items from (do not check the box, click on the item).

3. Click the "Batch Create" button.

4. Enter the number of items you wish to create.

5. Click Create.
To Batch Modify Items

1. From the Item Editing view, change to the list view, by clicking the list icon.

2. Once in the list view, check the box next to the item you wish to create these items from.

3. Click the “Batch Modify” button.

4. Make the desired changes.

5. Click Modify.
Adding New Bibliographic Records

Adding New Records Manually

New Records can be created in BLUEcloud Cataloging. The same tools are available to you as reviewed earlier in this guide. Pre-built bibliographic templates are used to make the process even easier.

**NOTE:** Users will only see the type of bibliographic templates he/she has the appropriate privileges to use.

**To add a new bibliographic record**

1. Open the Staff menu.
2. Select Cataloging>Search.
3. Click + New Record in the lower right-hand corner of the window.

**NOTE:** The “+ New Record link is also available in a search that resulted in 0 results.

4. Select the appropriate Template from the drop-down.
5. Enter the appropriate information.
6. Click Create.
NOTES: You may add holdings to this new record, by clicking “Manage Holdings”.

You may add more bibliographic records, by clicking “New Record”.
Importing Bibliographic Records

SirsDynix has made finding and adding bibliographic records from outside sources easier than ever.

To Import Bibliographic Records

1. Search for a title in a Z39.50 search target.
2. Click on the title you wish to import.
3. Click the “Import” button.
4. Make the desired edits.
5. Click Create.
The Administrator will need to ensure your BLUEcloud Central settings are in place, before anyone will be able to work within BLUEcloud Cataloging.

**Institutions**

BLUEcloud Cataloging will not function if the institution(s) are not configured properly. Each institution must have the correct web services URL for BLUEcloud Cataloging to function. The general information fields are useful for general contact information you wish to make available to patrons in some BLUEcloud products.

*To modify Institutions*

1. Click on the **Admin** menu.
2. Hover/Click **Institutions**.
3. Click **Management**.
4. Select the desired **Institution**.
5. Enter the **Web Services URL** for that institution (*often the same URL is used for every branch)*.
6. Select the **ILS Institution ID** for the Institution.
7. Enter the **library’s address**.
8. Click **Save**.
Institution Groups

BLUEcloud Cataloging policies can be assigned to an institution and all of the child institutions or to a group of institutions. To assign to a special group of institutions, the administrator must first build the necessary groups.

To create institution groups

1. Click on the Admin menu.
2. Hover/Click Institutions.
3. Click Groups.
4. Enter the Name and Description.
5. Click Add Users to define which users have permission to use these groups when building policies within BLUEcloud Central.
6. Click Add.
7. Select the appropriate Institutions for this group.
8. Click Create.
Staff Privileges

The administration of Users, Groups, and Roles is performed within “BLUEcloud Central”. This is accessed from Admin menu > Users. SirsiDynix will deliver an administrator account; however, the administrator will need to define which staff members will be able to work within BLUEcloud Cataloging and what privileges they will have. To ensure a smooth flow, create each item in the order mentioned below.

Roles

Using the administrative login provided by SirsiDynix, the administrator can create groups in order to define what roles a user may have access to, within each product. To view existing roles, click “Show All” next to the search field.

To create roles

1. Open the Admin menu.
2. Click Users.
3. Click Role.
4. Click Create Role.
5. Enter a Name and Description.
6. Select the product in which this user should have access.
7. Click Add Privileges to Role.
8. Select the appropriate privilege(s).
9. Click Add.
10. Click Create.
Groups

Using the administrative login provided by SirsiDynix, the administrator can create groups in order to define what roles and which institutions a user may have access to. To view existing groups, click the “Show All” button next to the search field.

To create groups

1. Open the Admin menu.
2. Click Users.
3. Click Groups.
4. Click Create Group.
5. Enter a Name.
6. Select the Institution with which this group is associated.
7. Click + Add Roles to Group.
8. Click Create.
Users

Using the administrative login provided by SirsiDynix, the administrator can create user accounts with access to BLUEcloud Cataloging and/or BLUEcloud Central. To view existing users, click “Show All” next to the search field.

To create users

1. Click Admin.
2. Click Users.
3. Click Management.
4. Click Create user.
5. Fill in the user information fields, as needed.

*Note: Email addresses must be unique and match the BLUEcloud Staff ID in Horizon/Symphony.*

6. Associate the user with the appropriate Group.
7. Associate the user with the Institution he or she is associated with.
8. Click Create.
Cataloging Specific Policies

Cataloging Profiles

Many BLUEcloud Central policies tie into the Cataloging Profile, including Institution Groups, Enriched Content, Search Policy, Search Targets and Institutions. Be sure to review the BLUEcloud Central training before finalizing your BLUEcloud Cataloging policies. However, the Smart Search, Template and Merge and Replace policies are specific to Cataloging. Once you have the necessary policies created, enter them into the Cataloging Profile.
Smart Search Policies

Smart Search Policy

The Smart Search policy defines the match points used when comparing your local record to remote records (BC MARC or other Z39.50 sources).

A Default policy is delivered. However, if the default policy doesn’t work for your needs, you can create your own policy.

To create Smart Search Policies

1. Click Create Policy.
2. Enter a **Policy Name** and **Description**.
3. Define the **Owner**.
4. Click **Add Match Point**.
5. Select the desired match points.
6. Click **Add**.
7. Reorder the search order as desired.
8. Click **Create**.

**Merge and Replace Policy**

Merge and Replace policies determine the behavior of the Merge and Replace options in the Smart Search side-by-side view (when merging or replacing your existing record with one from a Z39.50 source). One is delivered for your use. However, you will need to attach it to your catalog profile, if you wish to use it. Note that it is not delivered attached to a Cataloging Profile. The default policy cannot be edited, however, you can create your own policies as needed.

**To create a Merge and Replace Policy**

1. Click **Create Policy**.
2. Enter a **Name** and **Description**.
3. Define the **Owner**.
4. If the merge and replace rules will be the same, click **Merge and Replace Rules**.
5. Enter the rules to be followed. For example, the image below shows how to automatically replace any 655 subfield a instances of “Fantastic Fiction” with “Fantasy Fiction”.

![Image of Merge and Replace Rules interface]

6. Click Add.

7. Repeat this for each Merge and/or Replace rule you wish to build.

8. Save your work.
Bibliographic Templates

While SirsiDynix delivers bibliographic templates, they are not available for staff use. They exist to give administrators templates to build from, rather than having to create all templates from scratch.

To create bibliographic templates

1. Open the Admin menu.
2. Select Products.
3. Select Cataloging.
4. Select Manage Templates>Bibliographic.
5. If you wish to create templates from scratch, simply click Create Template.
6. If you wish to copy a delivered template, click on it.
7. Click the Copy icon.
8. Enter a Name.
9. Select the Type of Full or Brief

   NOTE: When setting up staff permissions, the administrator can define rules that only allow access to Full or Brief types of records.
10. Symphony libraries only – Select the appropriate Catalog Format policy from Symphony.

   NOTE: This is simply necessary for the records to work within Symphony. The policy does not affect BLUEcloud records.
11. Enter the desired data in each field.

   NOTE: You can enter default text. The same record editing tools discussed earlier in this guide are available for template creation.
<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>000</td>
<td>nim</td>
</tr>
<tr>
<td>008</td>
<td>s</td>
</tr>
<tr>
<td>024</td>
<td>la</td>
</tr>
<tr>
<td>028</td>
<td>02 la</td>
</tr>
<tr>
<td>033</td>
<td>0 la</td>
</tr>
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