ABLE Library

Online Training

Training Guide

prepared by...

ABLE Library Online Training

Training Guide

This edition of the ABLE Library Online Training CD and Training Guide were produced for use with version 6 of ABLE Library up to and including 6.5.

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Introduction

Who Should Take This Course?

This course was designed for people who will use ABLE Library to perform binding preparation tasks.

It is also useful for supervisory and management staff who wish to gain a fuller understanding of ABLE Library's role in the binding preparation process.

Starting This Course

Insert the compact disc in your CD-ROM drive. The program should start automatically. If it does not, click **Start > Run > d:\AbleOnline.exe** (substitute the correct drive letter for your CD-ROM if necessary).

Navigating This Course

Click on the **NEXT** button to go to the next page.

Click on the **BACK** button to go back a page.

Click on the **CONTENTS** button to open the Table of Contents. You can view the course layout or select a different page.

Click on the **QUIT** button to exit this program.

What You Will Learn in This Course

As you proceed through this course, you will learn about the topics shown below. When you have completed the course you will know how to use ABLE to prepare materials for binding, send the materials to the bindery, and process the finished product.

If you are just beginning the tutorial, click on "**About ABLE and this Course**".

If you have previously completed portions of this tutorial, or would like to review a specific chapter, click on **Contents** and choose any topic to start at that point.

- About ABLE
- Starting the Program and Logging In
- The Title Composition Window
- Retrieving Titles
- Creating Lots
- Preparing Periodicals for Binding
- Preparing Monographs for Binding
- Preparing Paperbacks and Theses for Binding
- Making Changes in our Lots
- Transferring Lots to the Bindery
- Receiving Shipments from the Bindery
- Reports
- Other Functions

Additional Materials

Along with your installation materials, you may need the following items:

- *Binding Tickets*
- *Slot Guide*
- *Data Exchange Summary forms*

If so, please visit your bindery's *Customer Service & Communication* page on our Web site. Binding tickets and slot guides may be ordered online; data exchange summary forms may be downloaded and printed.

What You Will Need

In order to complete the exercises in this course, you will need the following:

1. A local, network or Web ABLE Library installation with a shortcut pointing to the appropriate installation.
2. The ABLE FTP Client, if you will be using the FTP option for sending work to the bindery.
3. Ten samples of periodicals that you have regularly bound in the past.
4. Binding tickets loaded in your printer, if you will be using pre-printed forms, or plain paper for a laser or inkjet printer.

Chapter 1: About ABLE and This Course

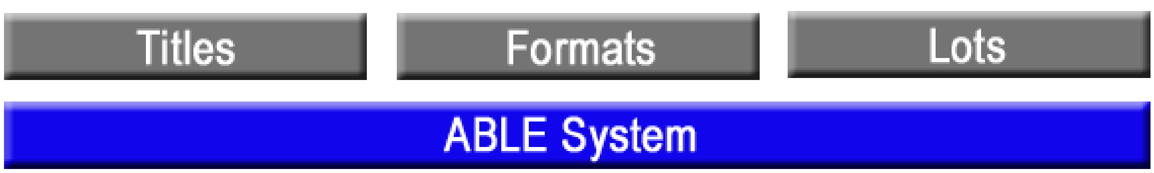
What is ABLE?

ABLE is an automated solution that helps you manage the flow of materials between the library and the bindery.

Its easy-to-use tools allow you to process your bindery shipment efficiently and accurately.

What are the Components of Our ABLE System?

In our ABLE system, we have the ABLE Library program and we have data that's specific to our account. There are three types of data that we'll be learning about and using.



Title Data

The first type of data is the title data that resides in our permanent title database. This data contains all of the information about our periodicals that we need in order to bind them consistently from one time to the next.

Format Data

Second, we have format data, or formats. Formats are templates or layouts that provide a data framework that we use to add new periodical records to our permanent database or to prepare monographs, theses and other types of materials for binding.

Lot Data

Third, we have lot data. Lots are the sets of items that we prepare and send to the bindery for processing.

Let's take a general look at how our system components fit in to the overall process.

The ABLE Library Binding Cycle

The ABLE Library Binding Cycle is a straightforward, four-step process that begins with the preparation of materials selected from the library, and ends with the return of the finished product from the bindery.

Step 1 – Create Lots

In Step 1, we create **lots** that have a record for each item being sent to the bindery. Usually we'll create a separate lot for each product type: periodicals, monographs, paperbacks or theses.

Step 2 – Enter Information

In Step 2, we enter binding information for each item to be bound and print a binding ticket for each item.

When binding periodicals, we select titles from our permanent database, and add specific information such as volume, month, year, etc. Then we add the completed information to a lot as an **item** record.

When binding monographs, paperbacks, or theses, we select a **format** that matches the way we want our volume to look. Then we enter the title, author, call number, and so on and add the completed information to a lot as an **item** record.

Step 3 – Send Shipments

In Step 3, we send our completed lots to the bindery. Lots can be transferred on diskette, but usually are transferred using FTP.

Step 4 – Receive Shipments

Finally, in Step 4, we receive the materials that are returned from the bindery back into ABLE.

Later we'll learn about maintenance and management functions that fall outside of the Library Binding Cycle.

Chapter 2: Getting Started

Starting the Program

To start ABLE, we'll double-click the ABLE shortcut that was created during the installation process.

This displays the login window.

Note: If Netscape is your default browser, the ABLE shortcut will point to Netscape. You'll need to create a shortcut for Internet Explorer using the target shown for the original Netscape shortcut.

Logging In

On the Login window, we enter our Account ID if it is not already displayed. Then we enter *SMAN* as our Operator ID, *IMIT* as the password, and click on the **Log On** button. When we've logged in successfully, we'll see the ABLE Title Composition window!

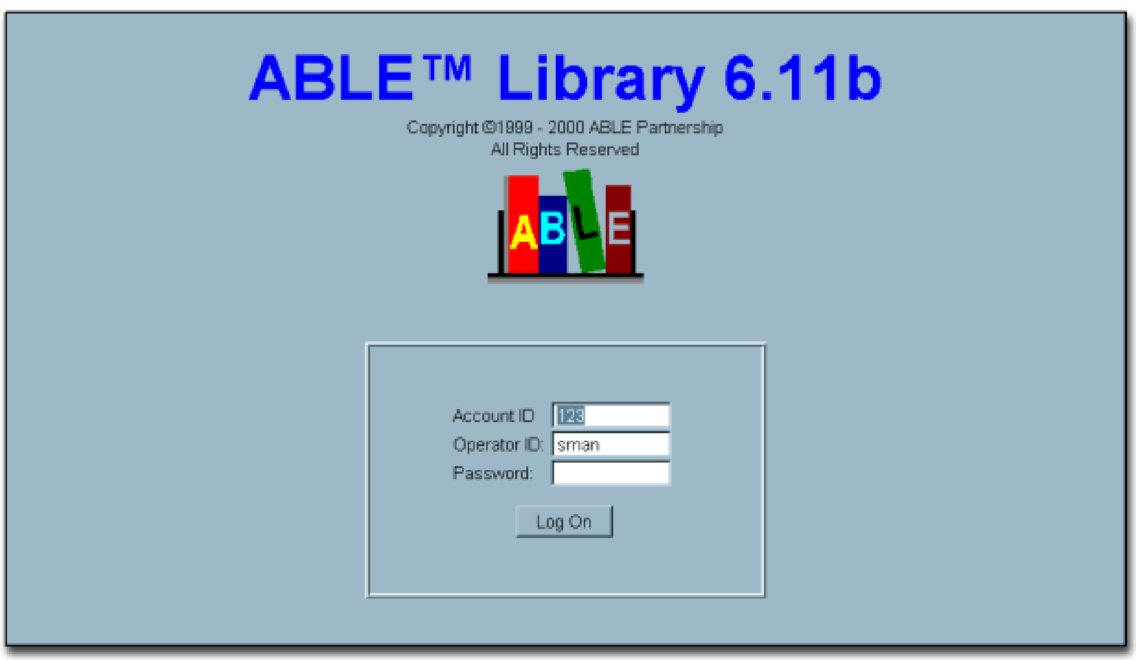
Exercise: Log In to ABLE on Your PC

1 Enter the Operator ID (SMAN) and press **TAB**.

2 Enter our Password and press **TAB**.

Note: You should have received the password with your installation materials.

3 Press **ENTER** or click on **Log On**.



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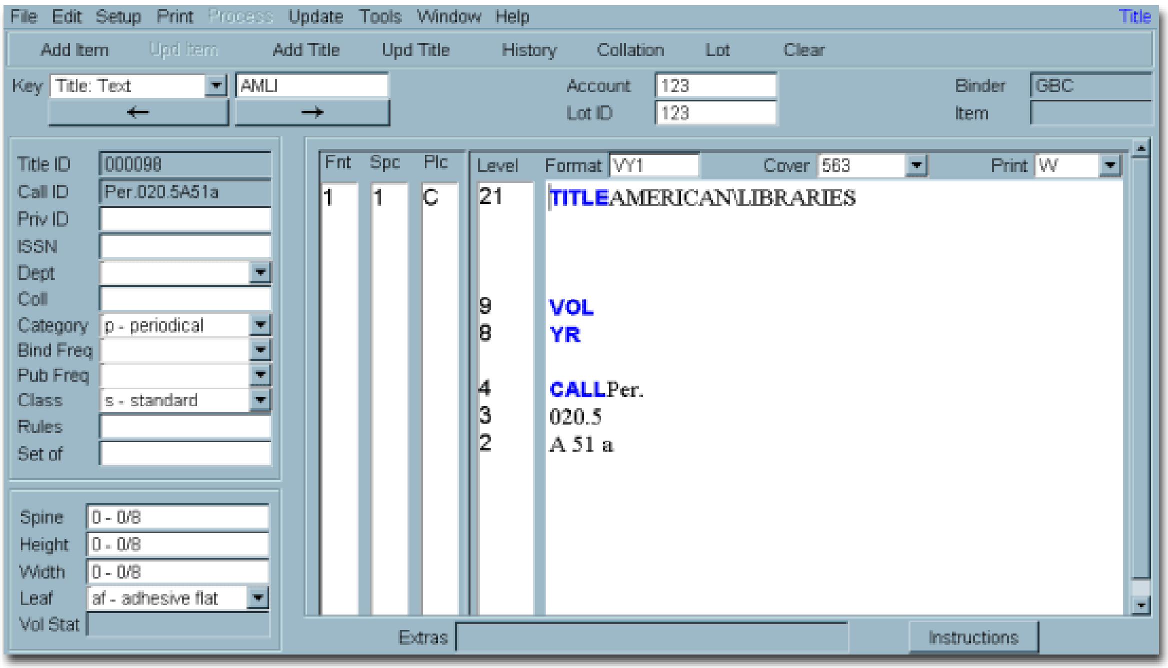
Chapter 3: A Brief Tour of the Title Composition Window

In this chapter, we'll learn about the fields and functions of the Title Composition Window.

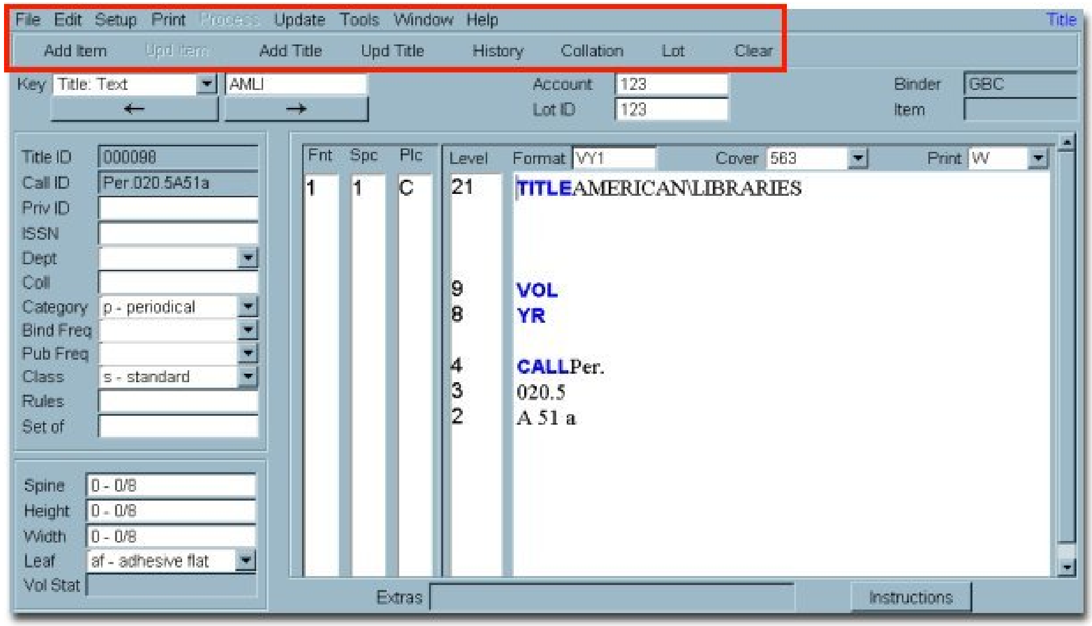
The main window in ABLE is known as the Title Composition window.

Here's how it appears with a title record displayed.



Menus and Command Buttons

At the top section of the Title Composition are the Menus and Command Buttons that we use to perform functions and to open the other windows that we use in ABLE.



Below the menus and command buttons, we see the **Key** dropdown and the **Key** entry field. In the next chapter, we'll discuss the important role of the Key in Title Composition.

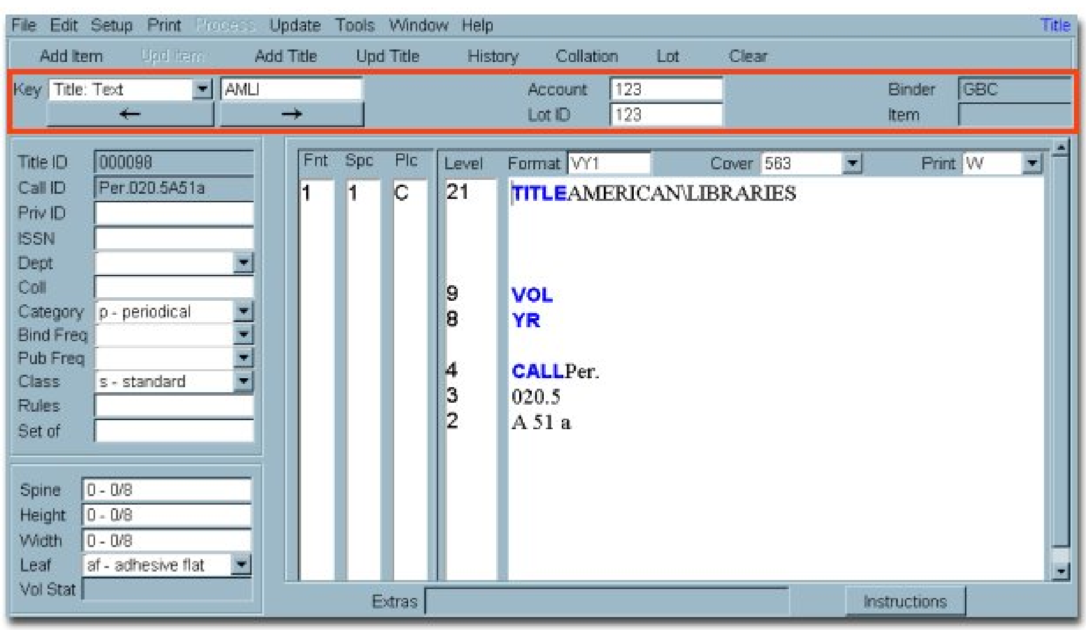
Below the key fields are the **Next Record** and **Previous Record** buttons.

Account is the library account number.

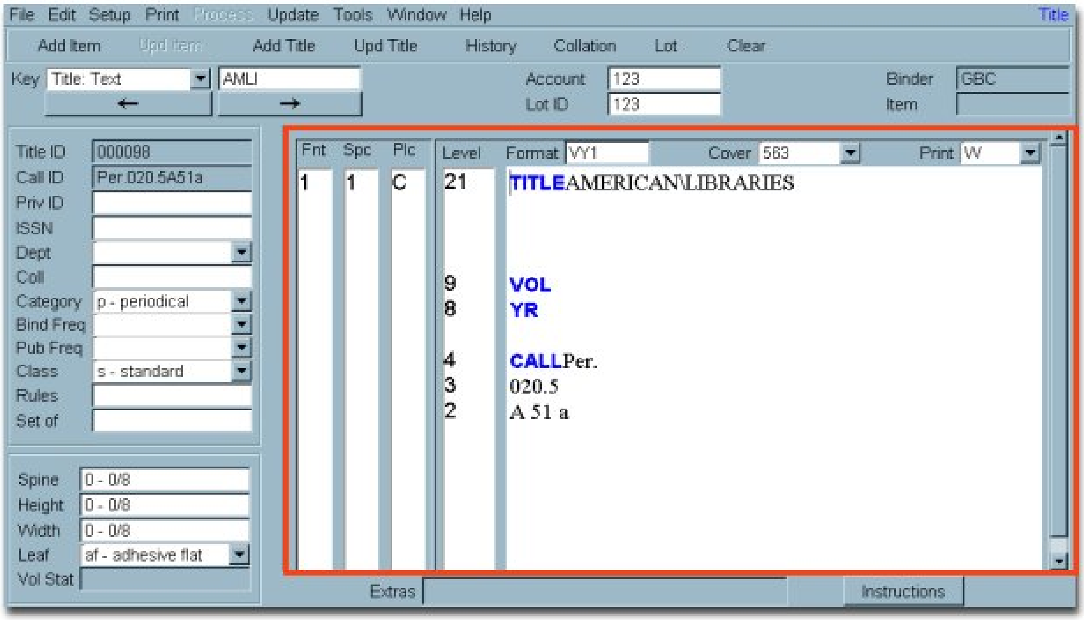
Binder is the code for your bindery.

Lot ID is the name of our current lot.

Item is the number of the current item in our lot.



In the center right section of the window, we have fields that contain information about how a specific volume is to appear.



We use the **Format** field to enter the ID of a template when we create new title records or lot items.

Cover is the number of the selected material color.

Print is the lettering color.

The number(s) in the **Fnt** column designate the font that is used in stamping text on the spine. *This should always be "1" unless you are instructed otherwise.*

The number in the **Spc** column designates the spacing, or pitch, between lines. *This should always be "1".*

The **Plc** column indicates placement of text on the spine and *should be "C" unless you are instructed otherwise.*

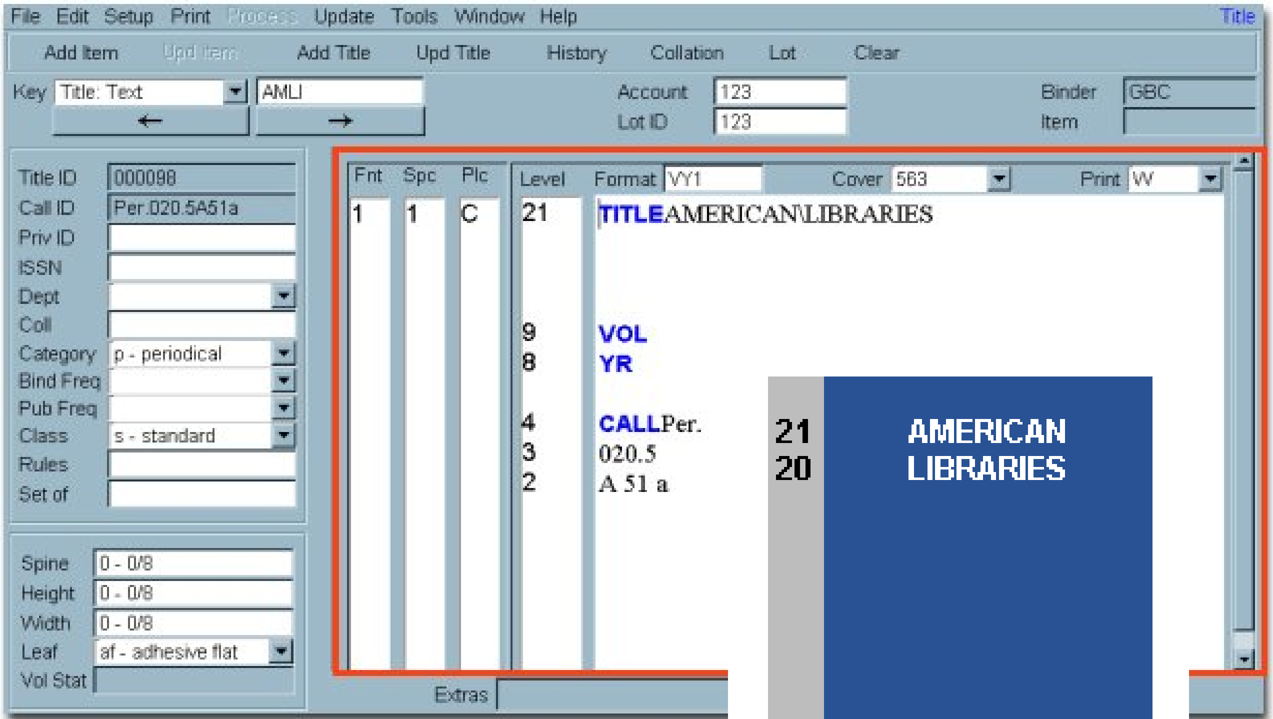
The **Level** column indicates the level, or position on the spine, where the corresponding lettering will be stamped. The level is frequently referred to as the **slot**.

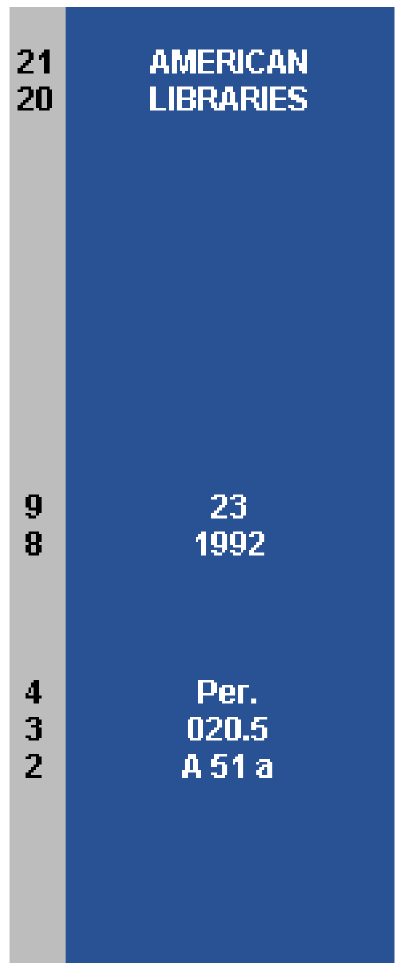
To the right of the level column we have the **Title Text** area where we enter all of the information that we want to see on the spine.

Words that appear in **black** are stamped on the spine. Words that appear in **blue** are prompts that show us where to enter specific types of data. Prompts are not always used for title text but should be used for **variable**, **call number**, **imprint** and **author** (monographs/paperbacks/theses).

Title Text Placement

When we look at the title, we see that the words of the title are separated by backslashes.





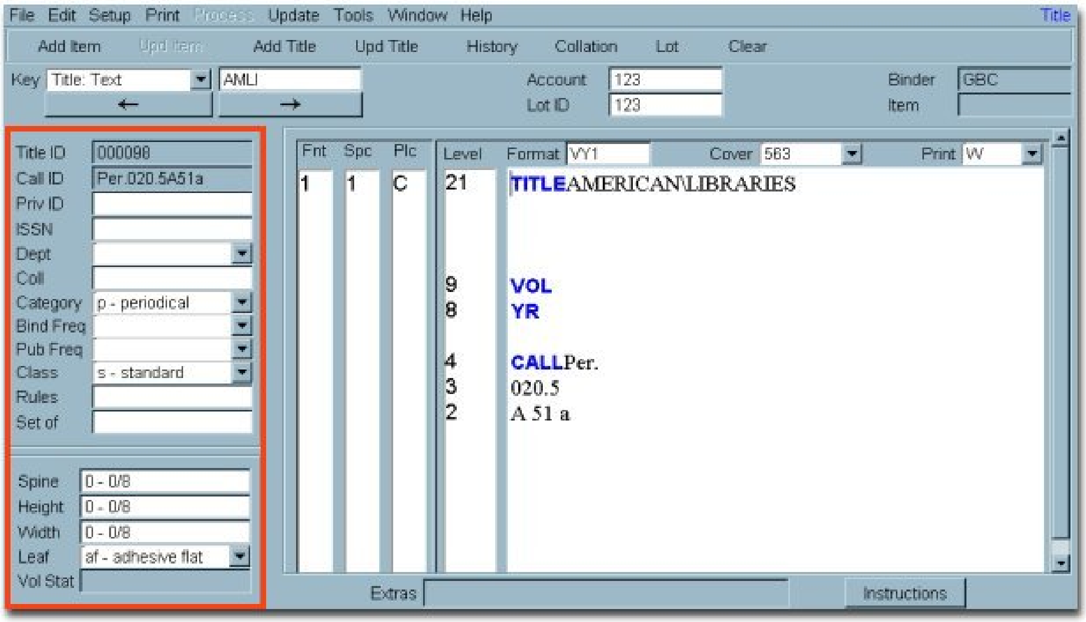
A backslash indicates to ABLE that the word following the backslash will be stamped on the next line below the current line.

In this example, the word AMERICAN will be stamped in slot 21 and the word LIBRARIES will be stamped in slot 20.

Volume will be stamped in slot 9 and year in slot 8.

The Call Number will occupy slots 4, 3 and 2.

In the center left side of the window, a few fields that we'll use, a number of fields that are optional, and others are not used at all in bindery preparation.



The **Title ID** is the number assigned to a title record when it is added to the permanent database. Title ID is a searchable key value.

Call ID is the key value we use to retrieve titles by call number. This is created automatically if a call number is present for a title.

Private ID is an optional field that may contain any value that may be useful to the library. Private ID is a searchable key value.

ISSN/ISBN is also an optional field that is searchable.

Dept (department) and **Coll** (collection) may also be used optionally. (See the appendix of your manual for more information about using these fields.)

Category indicates the type of volume (i.e. periodical, monograph, etc.)

Bind(ing) **Freq(**uency), if used, indicates the number of times a volume is bound each year.

Pub(lication) **Freq**(uency), if used, represents the number of times a volume is published each year.

Class is the type of binding, i.e. custom, standard, etc.

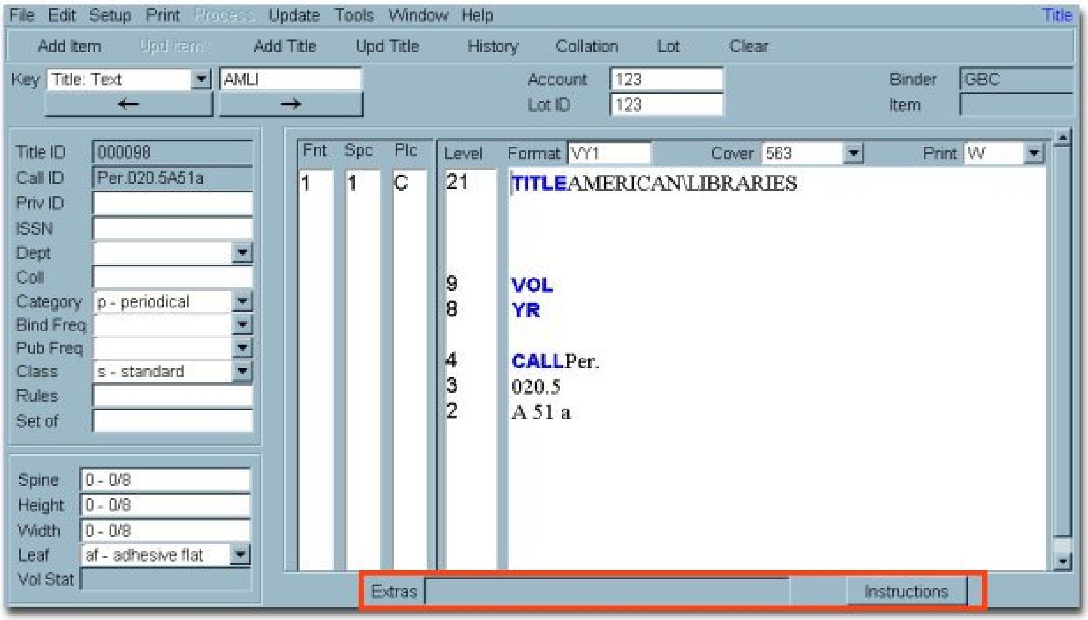
We can optionally use the **Leaf** field to request a specific leaf attachment method although it is not necessary to do so.

The remaining fields on the left side of the window are not used in bindery preparation.

At the bottom of the window, we see the Extras field and the Instructions button.

The Extras field is not used.

The Instructions button is used to open another window where we can enter special instructions that print on the ticket for the bindery.



Now that we've familiarized ourselves with the Title Composition window, let's see how we retrieve titles from our database!

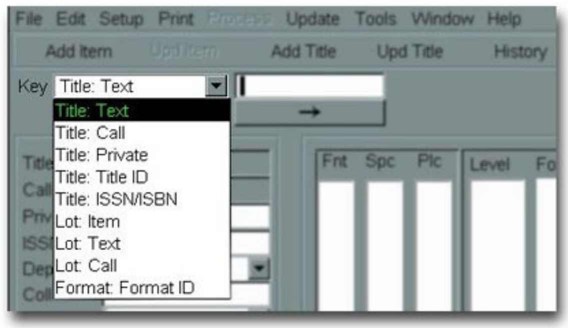
Chapter 4: Retrieving Titles

In this chapter, we'll learn about the Key, and how it is used to retrieve titles.

The Key

The most important feature of the Title Composition window is the key.

Looking at the key dropdown, we see nine key values. The value in the Key field determines the mode of our Title Composition window.



When we select one of the five keys that start with “Title”, our Title Composition window is in **Title Mode** and we can access records in our title database.

When we select one of the three keys that start with “Lot”, our Title Composition window is in **Lot Mode** and we can access records in our lots.

When we select the “Format” key, our Title Composition window is in **Format Mode** and we can access format records.

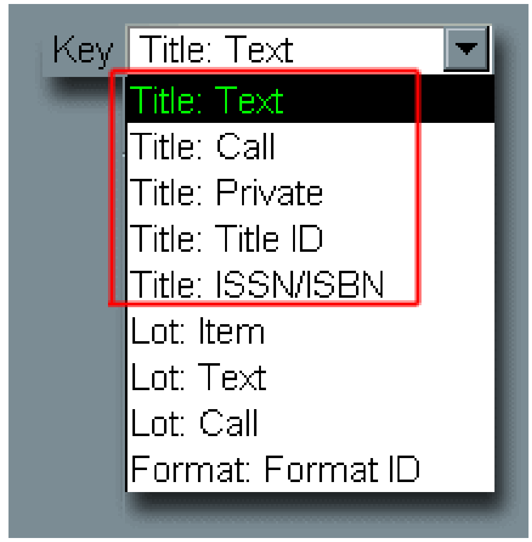
For now, we’ll concentrate on Title Mode.

Using Title Mode

Using Title Mode, we can retrieve, add, change and delete records in our permanent database, and we can add items of all types to lots.

We can also view periodical binding history.

Title Keys



As we can see from looking at the Key dropdown, there are five title mode keys: **Text, Call, Private ID, Title ID, ISSN/ISBN**.

Text Key

The Text key is the most commonly used of the five title keys. In general terms, the key value is made up of the first two letters of the first four major words of the title. If there are not four major words, the text key will be shorter.

These rules also apply: Single-character words are excluded; punctuation, hyphens and special characters are ignored. Words split on two lines are treated as two separate words. The following words are excluded: an, and, at, by, das, der, die, ein, eine, el, for, gl', gli, il, in, l', la, las, le, les, lo, of, on, the, un, una, une, uno.

These examples show how the text key is constructed:

If the title is…	**the key will be…**
The National Geographic Magazine	NAGE
Abnormal Psychology	ABPS
Abnormal Psychology of America	ABPSAM
Journal of the American Chemical Society	JOAMCHSO
N.A. Indians	IN
(In this example, the words N. A. are excluded because they are single-character words.)	
N-A Industries	NAIN
(In this example, the hyphen is dropped, making the first word “NA”.)	
Abnormal Psych\ology	ABPSOL
(In this example, the title is viewed as three words since the word Psychology is split onto two lines.)	

Call Number Key

The Call key is made up of the first 15 characters of the call number, if present. Spaces, line breaks and backslashes are omitted; hyphens are included. This key is blank if there is no call number for the title.

For example, a call number that would appear on the spine as shown, will have a key value of PER.020.5A51A

Per.
020.5
A 51 a

Private ID Key

The Private ID key is any value that is entered for a title by the library. This key is blank if a Private ID is not entered.

ISSN/ISBN

The ISSN/ISBN key is the standard serial or book number entered for a title by the library. This key is blank if ISSN/ISBN is not entered.

Title ID

The Title ID key is the number that ABLE assigned to a title when the title was stored in the permanent title database.

Record Retrieval Methods

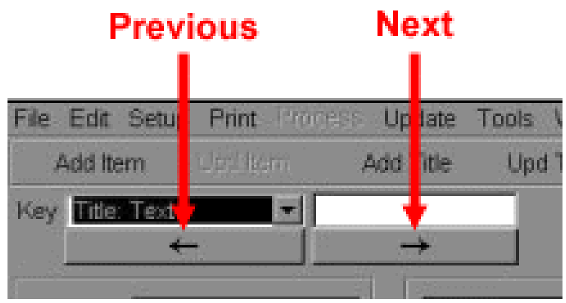
There are three methods of retrieving titles from our permanent database:

- Sequential Retrieval
- List-option Matching Search
- Sequential-option Matching Search

Sequential Retrieval Using the Next Button

The simplest retrieval method is Sequential Retrieval using the **Next** and **Previous** buttons.

The **Next** button allows us to look forward at the titles in our database one at a time. The order in which they are displayed depends on the key that is selected. For example, if we've selected the Text key, we'll see the titles in alphabetical Text key order. If we've selected the Title ID key, we'll see the titles having the lowest Title ID first.



Sequential Retrieval Using the Previous Button

The Previous button allows us to look backwards through the titles in our database.

(If we click the **Previous** button at the beginning of our database, we'll see the message "Title End of File(9)".)

Demonstration: Sequential Retrieval

This demonstration shows how we use the Sequential Retrieval method.

Exercise: Retrieve Titles Using the Next and Previous Buttons

In your Title Composition window, click on the **Next** button a few times and look at the titles you've retrieved.

Then click on the **Previous** button a few times.

Matching Searches

The Next and Previous buttons are fine for certain purposes, but they're not very efficient when we want to find a particular title in our database. That's where the matching searches come in!

To retrieve records using a matching search, we begin by selecting a key; in the following examples, we'll use the Text key.

We enter search data that contains as much or as little information as we wish, and proceed with our search. If there is more that one record that matches, we'll select our target record from the set of matching records. <u>The way in which we select our target record is the distinction between the list-option and sequential-option matching searches.</u>

Let's take a look and see how this works!

NOTE: Particularly when using the Text key, it is common to find several titles that have the same key value.

List-option Matching Search

The list-option matching search is generally the most efficient way to retrieve titles.

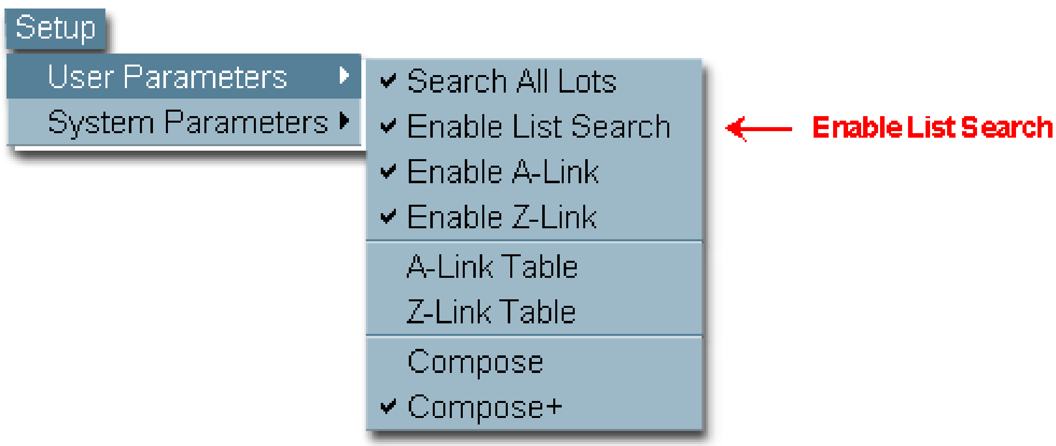
To use this search, we enter our search data in the key entry field and press ENTER.

If there is only one record that matches our search data, the title is displayed on the screen. If there is more than one matching record, we'll see a list of all of the matching titles. We then select our title from the list

Enabling List Search

Before we can use the list option matching search, we'll need to make sure the list function is enabled in our system.

To enable list search, click **Setup > User Parameters > Enable List Search**. When it is selected, the Enable List Search option will have a check mark next to it as seen below.

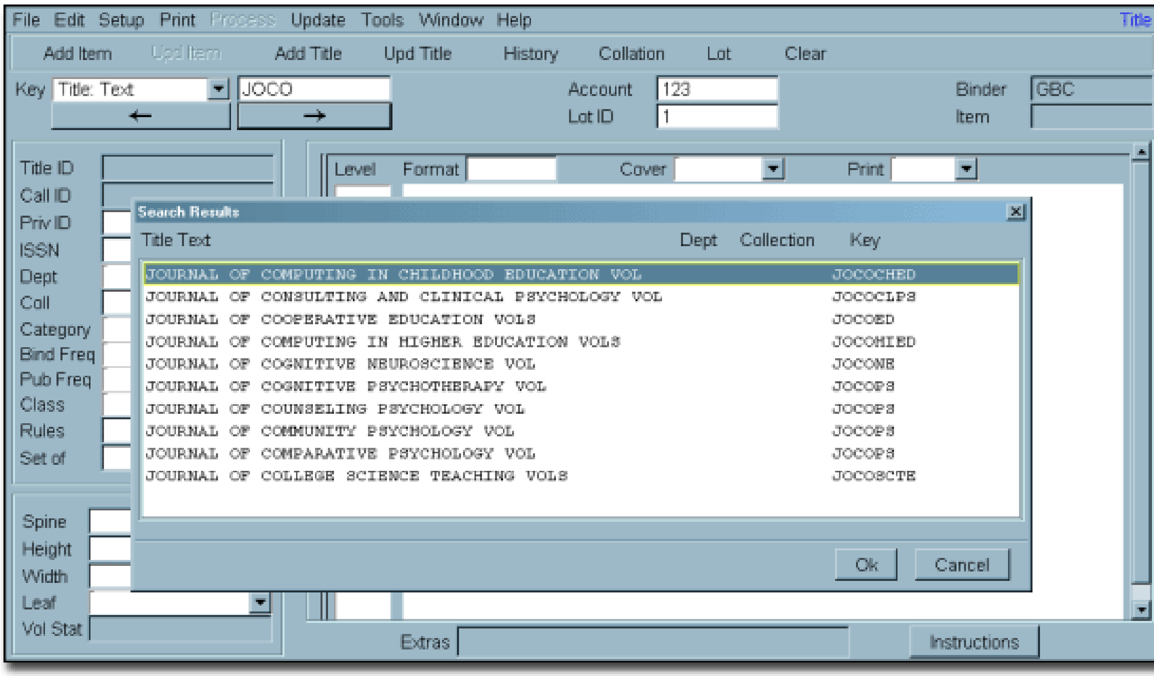


Demonstration: List-option Matching Search

The demonstration shows how we use the list-option matching search method to retrieve a title from our database.

Let's say we'd like to retrieve the title <u>Journal of Community Psychology</u>.

We'll enter JOCO as our search data. Since there are a number of titles whose text keys begin with JOCO, a list is displayed. We can easily select the <u>Journal of Community Psychology</u> from the list.



Example: List-option Matching Search – Exact Match

Below we see an example of a different search that resulted in an exact match.

We entered the key "JOCOSCTE" and pressed **ENTER.** Since there was only one matching record, the title was displayed on the screen, bypassing the list altogether.

Exercise: List Option Matching Search

Retrieve some of your sample periodicals following the steps shown below:

Using partial search data…

1 Enter only the first two letters of the first major word Key Entry field and press **ENTER**.

2 Select the title from the list.

3 Note the complete key value shown in the key data field.

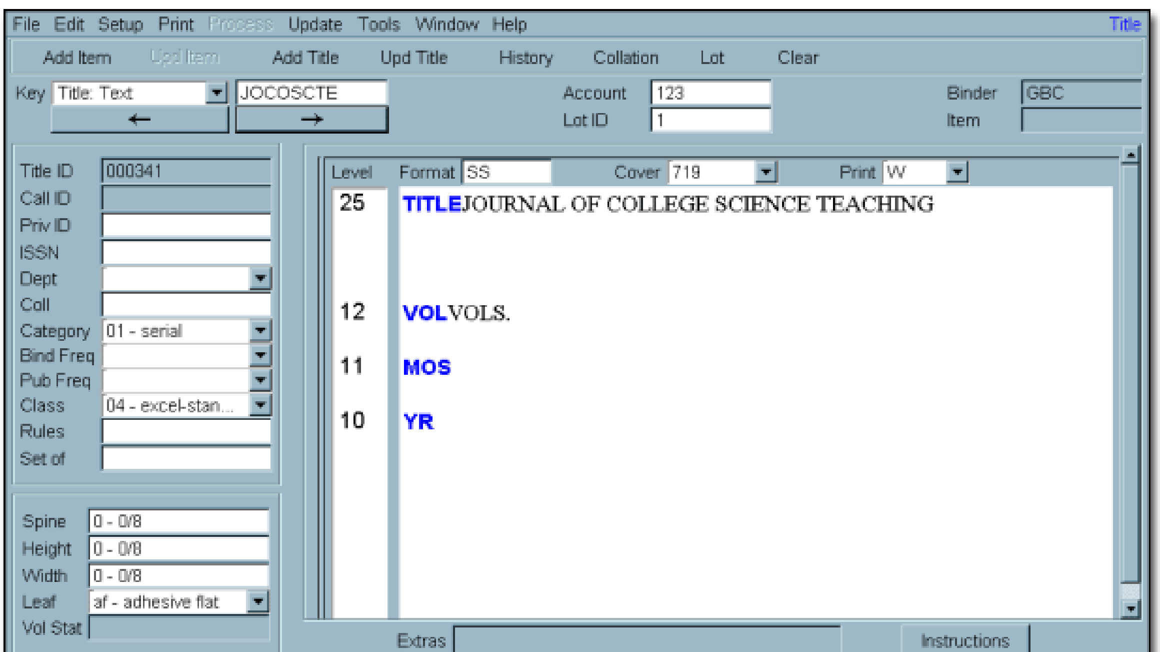
4 Click on **Clear**.

Using complete search data…

1 Enter the complete key value in the Key Entry field and press **ENTER**.

2 Again, select the title from the list if a list is displayed.

3 Click on **Clear**.



Sequential-option Matching Search

The sequential-option matching search is almost the same as the list-option search however, instead of pressing **Enter** to start our search, we click the **Next Record** button.

If there is only one record that matches our search data, the title is displayed on the screen. If there are multiple matches, as we saw using the list-option search, we'll see the first match on the screen and will click the **Next Record** button until the correct title is displayed.

Demonstration: Sequential-option Matching Search

The demonstration shows how we use the sequential-option matching search method to retrieve the title Astrophysical Journal.

An Important Rule to Remember!

It's important to remember that when we enter more complete search data, the result will be a shorter list or, perhaps, an exact match.

If we had simply entered "JO" to retrieve the Journal of Community Psychology, our search would have resulted in an unmanageably long list. By entering "JOCO", our result was a short list.

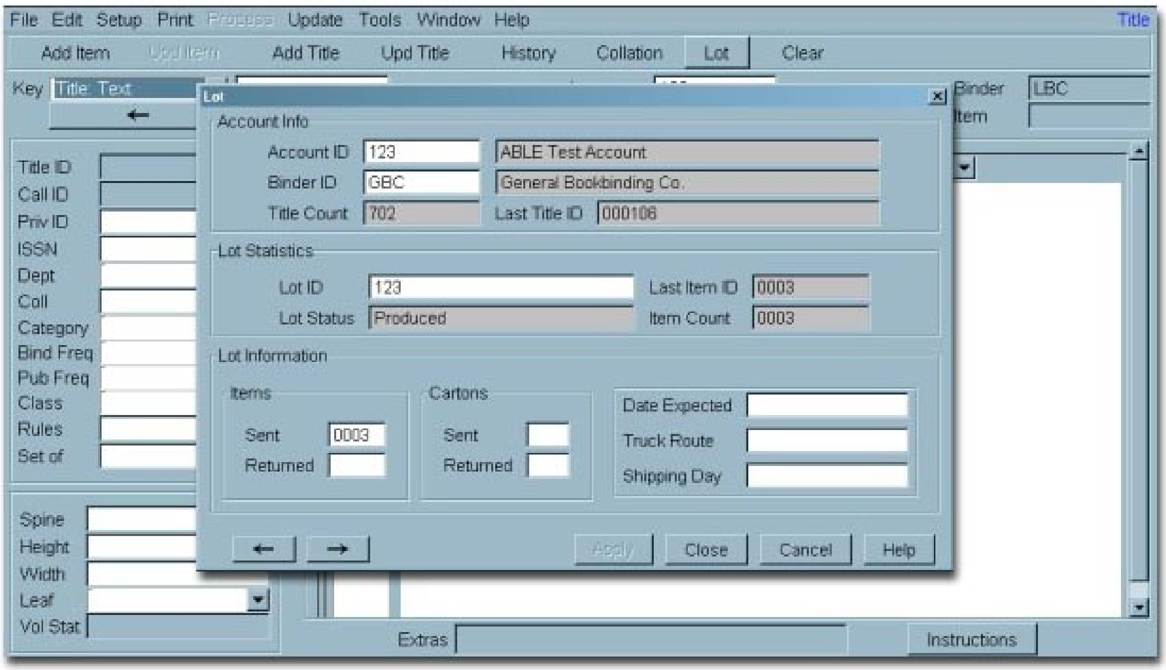
In retrieving the "Journal of College Science Teaching", we entered the complete key - "JOCOSCTE" - and got an exact match.

Chapter 5: Creating Lots

In this chapter, we'll learn how to do the first step in the ABLE Library Binding Cycle – Creating Lots.

Opening the Lot Window

To open the Lot window, we click on the Lot button.



About the Lot Window

At the top of the Lot window, we see general information about our account: Account ID, Binder ID, the count of titles in our permanent database, and the number of the last title in the database.

Under Lot Statistics, we see the current lot ID, the lot status, the number of the last item in the lot, and the count of items in the lot.

Under Lot Information, we see information about items, cartons and shipping. The item fields are updated automatically by ABLE. The Cartons and Shipping fields are optional.

At the bottom of the window, we see **Next** and **Previous** lot record buttons that work in the same way as the Next and Previous buttons in the Title Composition window. We also have buttons to **Apply** changes, to **Close** the window, **Cancel** changes, and open online **Help**.

Lot Names

Our lot name can be any name we wish, up to 8 characters, using the letters A-Z and the numbers 0-9.

It's most meaningful if we use a name that represents the pickup date and the product type. For example, if our shipment will be picked up on October 5, and we're creating a lot for periodicals, we might give our lot the name 100501P.

Creating a Periodical Lot

To create a periodical lot, we enter our lot name in the Lot field and press **TAB**. We'll click **Yes** to confirm that we want to create a new lot. Then we'll click on **Apply**, and **Close** to return to the Title Composition window where we see the new lot name displayed in the Lot field.

Demonstration: Creating a Periodical Lot

The demonstration shows the steps taken to create a periodical lot.

Exercise: Create a Periodical Lot

Follow the steps below to create a new lot:

1. Click on the **Lot** button.
2. Enter the lot name **100501P** in the Lot field and press **Tab**.

   (Use a pickup date of your choosing)
3. Click **Yes** to confirm that you want to create a new lot.
4. Click **Apply**.
5. Click **Close** to return to the Title Composition window.

   Note the new lot name in the Lot ID field!

Now we're ready to add periodicals to our lot!

Chapter 6: Preparing Periodicals for Binding

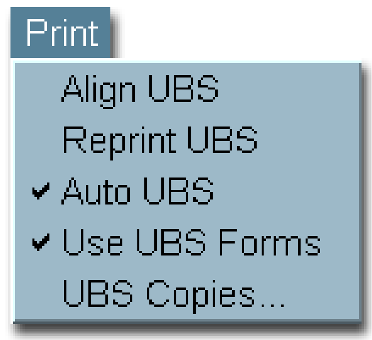
Configuring Printing for Binding Tickets

Before we add pieces to our lot, we'll want to make sure we are ready to print our binding tickets, or "Universal Binding Slips".

We have two options for printing binding tickets: We can print them on pre-printed forms, which is the traditional approach, or we can print the information on plain paper using a laser or inkjet printer (two tickets per sheet of 8.5 x 11 paper).

If we are using pre-printed forms…

We'll need to align our binding tickets in our printer and check to make sure our binding tickets will print automatically.



To do this, we…

1 Click on the **Print** menu.

2 Check **Use UBS Forms** to indicate we are using pre-printed forms.

3 Click **Auto UBS** if there is not a check next to that option.

By selecting this option, tickets print automatically when items are added to a lot.

4 Click **Align UBS** to print an alignment pattern on our tickets.

When you have finished, your print menu should look like the one shown to the right.

If we are using plain paper in a laser or inkjet printer…

We'll want to make sure that **Use UBS Forms** is not selected and we'll set the **UBS Copies** so that two copies of the ticket print on one 8.5 x11 piece of paper

To do this, we…

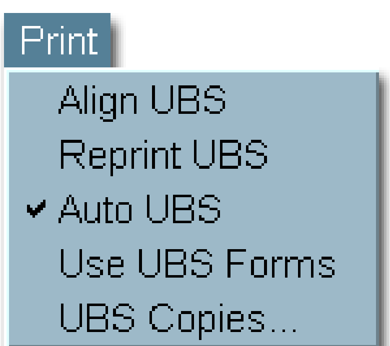
1 Click on the **Print** menu.

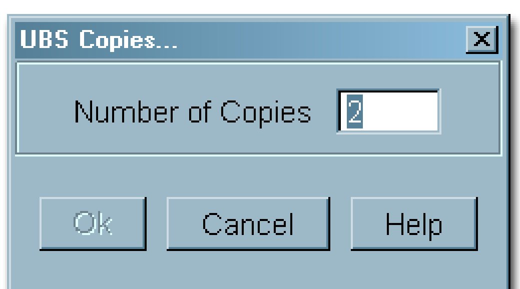
2 Click **Use UBS Forms** <u>only if there is a check</u> before the option.

3 Click **Auto UBS** if there is <u>not</u> a check before the option.

4 Click **UBS Copies** and set the number of copies to **2**; then click **OK**.

When you have finished, your print menu should look like the one shown below.





Exercise: Configuring Printing for Binding Tickets

Using one of the two scenarios described above, configure the printing options on your PC.

Adding a Periodical Title to a Lot

Now that we know how to retrieve titles from our database, we'll see that preparing periodicals for binding is a simple process.

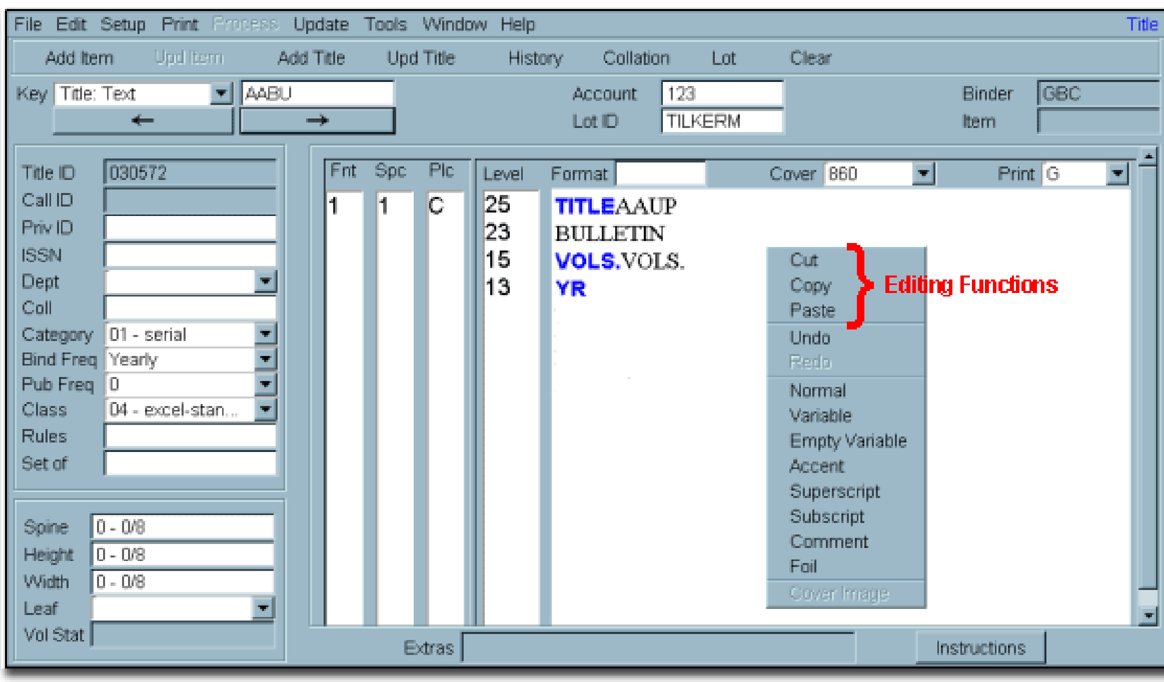
To add a periodical to a lot, we simply retrieve a title from our database, enter the variable information, and **Add** the record to our lot as an **Item**.

A Note about Text Editing

In the Title Text area of our Title Composition window, we can freely edit text as we would in other Windows-based applications.

Cut, copy and paste features are also available. We can access these features by right clicking in the Title Text area and selecting a feature from the popup menu.

We can also use the conventional **CTRL X, CTRL C** and **CTRL V** keystrokes to cut, copy and paste.



Demonstration: Adding a Periodical Item to a Lot

The demonstration shows the steps taken to add a periodical item to a lot.

Exercise: Adding Periodical Items to our Lot

To complete this exercise, you'll be using the periodical lot **100501P** that you created in the previous chapter.

You'll also need 10 samples of periodicals that you've bound frequently in the past.

To add a periodical piece to a bindery lot, we…

1 Select the Text key from the Key dropdown.

2 Enter the text key for the first title and press **ENTER**.

3 Select the correct title from list (if a list is displayed).

4 Press **TAB** to move the cursor to the right of the first variable prompt and enter the variable information. **TAB** to the other variables, if present, and enter the corresponding information.

Click **Add Item** "Item (0001) Added" at the bottom of your screen and a binding ticket should print on your printer.

Repeat steps 2 – 5 to add the remaining 10 sample periodicals.

Viewing Lot Status

There are two ways to view lot status. Using the first, we can view detailed information about an individual lot. Using the second, we can view basic information about all of the lots in our system.

Individual Lot Status

We can view detailed information about individual lots by opening the lot window and selecting the lot.

Exercise: View Detailed Lot Information

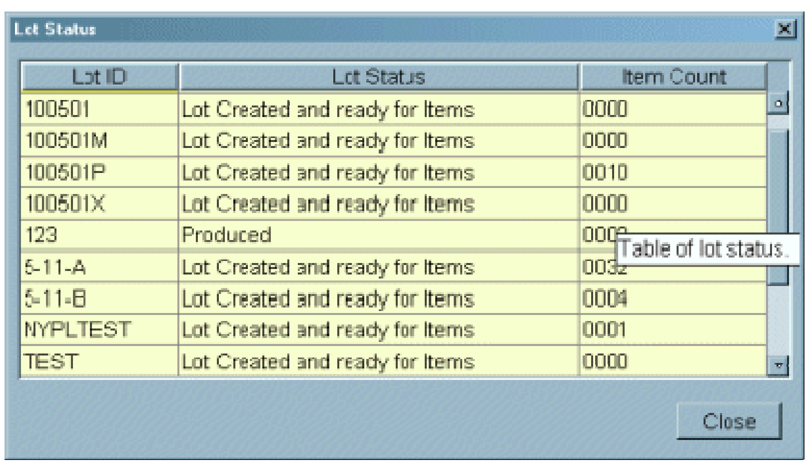
Click the **Lot** button to display the Lot window. In the Lot Statistics section, note the **Last Item ID** and **Item Count** fields have been updated.

Viewing All Lots

To view a list of all lots click Window > Lot Status

Exercise: Viewing All Lots

Click Window > Lot Status to see a list of all lots.



Chapter 7: Preparing Monographs for Binding

Creating a Monograph Lot

Earlier, we created a lot for periodicals. Now let's create a monograph lot.

There's no difference between a periodical lot and a monograph lot so we'll repeat the same steps we used to create our periodical lot. Keeping our lot-naming scheme in mind, this time our lot name will end with **M**.

Monograph Formats

Adding a monograph to a lot is similar to adding a periodical, but instead of retrieving titles from our database, we use **Formats**. While we're not retrieving titles from the database, we must leave the Key set to one of the <u>title keys.</u>

Formats are simply *templates* that contain basic formatting information, but they <u>don't</u> contain any stampable text.

We can use any of a number of standard formats depending on the style of the volume we are binding. The standard formats are listed below:

Format ID	Used for…
A	AUTHOR
ATM	AUTHOR, TITLE
AT1M	AUTHOR, TITLE, CALL
TAM	TITLE, AUTHOR
TA1M	TITLE, AUTHOR, CALL
TM	TITLE
T1M	TITLE, CALL

Demonstration: Using a Monograph Format

This demonstration shows the steps we follow to add a monograph item to a lot. We'll use the format **TAM** to format a Title/Author item.

A Few Points to Keep in Mind

- Enter backslashes between words of the title so the words will stamp on separate lines. If you would like blank lines between words, enter multiple backslashes.

  For one blank line, enter two backslashes (\\) between words.

  For two blank lines, enter three backslashes (\\\) between words.

  For three blank lines, enter four backslashes (\\\\) between words.

  And so on…
- Do not enter level numbers unless you are sending a set of like volumes.
- Monograph items are not saved in the permanent title database.

Exercise: Add Monograph Items

Create the monograph lot 100501M. Then follow the steps below to add the sample monograph items to your lot:

1 **TAB** to the format field.

2 Enter **TAM** in the **Format** field and press **Tab**.

3 **TAB** to the right of the Title prompt and enter the title information as

A\FIELD\GUIDE\TO\ANIMAL\TRACKS

4 **TAB** to the right of the Author prompt and enter MURIE

5 Click **Add Item**.

***Note**: For monographs, the cover color should be **BUC** and the print color should be **W**. These choices are already selected in the monograph formats.*

Enter pieces 2 through 7 as shown below.

When you have finished, click **Lot** to view the updated lot information.

Sample Monograph Items

Use the title style TAM to enter pieces 1 - 3; use the title style ATM to enter pieces 4 - 7.

1	A Field Guide to Animal Tracks	Murie
2	Victorian Painting	Wood
3	On the Rocks of Southern Africa	Lee
4	Music Literature Outlines	McKenzie
5	Psychology of Meaningful Verbal Learning	Ausubel
6	History of Urban Form	Morris
7	Radiance from the Waters	Boone

Chapter 8: Preparing Paperbacks and Theses for Binding

[NOTE: You may skip all or portions of this chapter if you will not be preparing paperbacks or theses.]

Paperback and Thesis Formats

We follow the same process to add paperbacks and theses as we do for monographs except that we use different sets of formats. The standard formats for these product types are listed below:

Paperback

Format ID	**Used for…**
ATFS	AUTHOR, TITLE
AT1FS	AUTHOR, TITLE, CALL
TAFS	TITLE, AUTHOR
TA1FS	TITLE, AUTHOR, CALL
TFS	TITLE
T1FS	TITLE, CALL

Thesis

ATT	AUTHOR, TITLE
AT1T	AUTHOR, TITLE,CALL
TAT	TITLE, AUTHOR

Adding a Paperback or Thesis Item

Here's how we add a paperback or thesis item:

Create a paperback or thesis lot, or select an existing lot.

Follow the steps below to add items to the lot:

1 **TAB** to the format field.

2 Enter the appropriate code in the **Format** field and press **Tab**.

3 **TAB** to the right of the prompts and enter the required information.

4 Click **Add Item**.

Note: For paperbacks, the color should be ***9000*** *and the print color should be* ***W****. These choices are already selected in the paperback and thesis formats.*

Exercise: Add Paperbacks

Create the paperback lot 100501FS. Then follow the steps below to add the sample paperback pieces to the new lot.

1 **TAB** to the format field.

2 Enter **TAFS** in the **Format** field and press **Tab**.

3 **TAB** to the right of the Title prompt and enter the title information as

A\FIELD\GUIDE\TO\ANIMAL\TRACKS

4 **TAB** to the right of the Author prompt and enter MURIE

5 Click **Add Item**.

Enter pieces 2 through 5 as shown below.

When you have finished, click **Lot** to view the updated lot information.

Sample Paperback Pieces

1	A New Guide to Better Writing	Flesch
2	How to Do Things With Words	Austin
3	Paper Son	Chin
4	Imaging Teachers	Fischman
5	The Fortunes of the Humanities	Gilman

Exercise: Add Theses

Create the thesis lot 100501T. Then follow the steps below to add the sample thesis pieces to the new lot.

1. **TAB** to the format field.
2. Enter **TAT** in the **Format** field and press **Tab**.
3. Choose cover color and print color.
4. **TAB** to the right of the Title prompt and enter the title information as
   NOVEL\PHOTOCLEAVABLE\PROTECTING\GROUPS\FOR\PRIMARY\ALCHOHOLS
5. **TAB** to the right of the Author prompt and enter SMITH
6. Click **Add Item**.

Enter pieces 2 through 5 as shown below.

When you have finished, click **Lot** to view the updated lot information.

Sample Thesis Pieces

1	Novel Photocleavable Protecting Groups for Primary Alchohols	Smith
2	A Research Study to Determine Customer Service at Universities	Roman
3	Design of a Wristwatch PDA	Wu
4	Organization of Particle Image Velocimetry	Chmiel
5	The Effects of Muscle Stretching on Maximal Muscle Performance	Morgan

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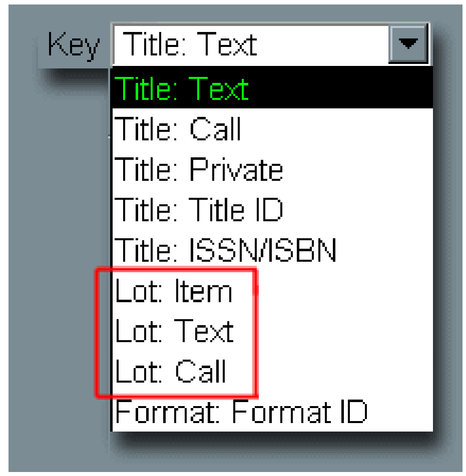
Chapter 9: Making Changes in Our Lots

Overview

Now, we're going to make some changes to our lots before we send them to the bindery. We'll change the title in one job, and we'll delete a piece from another.

Using Lot Mode



Until now, we've used Title Composition in *Title* mode. Now we're going to explore Lot mode.

As we can see from looking at the Key dropdown, there are three Lot mode keys: Item, Text and Call.

When we are in Lot mode, we can retrieve, change and delete items in lots.

We can also reprint binding tickets and view periodical binding history.

Lot Item Key

The Item key is the sequential number that is assigned to an item when it is added to a lot. The item number is printed on the binding slip. The Item key is the most frequently used key in Lot mode.

Lot Text Key

The Lot Text key is the same value as the Text key in Title mode.

Lot Call Key

The Lot Call key is also the same value as the Call key in Title mode.

Changing a Piece in a Lot

To change a lot item we begin by selecting the lot and changing our mode to Lot mode. Then we retrieve the piece using our selected key and we make the necessary change. When we've finished, we'll reprint our binding ticket and then click the **Upd Item** button to update our item record.

Be sure to replace the original binding ticket with the new ticket.

Exercise: Changing an Item in a Lot

Follow the steps below to change an item in a lot.

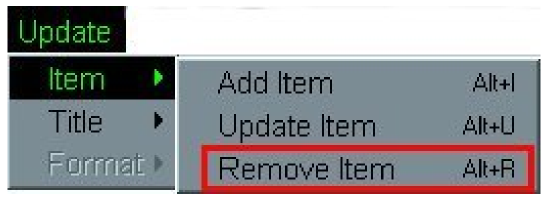
1 Use the Lot window to select the lot 100501M. Then select the Item key.
2 Enter **4** in the key entry field and press **ENTER**.
3 **TAB** to the right of the author prompt, delete "McKenzie" and enter " GLEASON.
4 Click Print > Reprint UBS to print a new copy of the binding ticket.
5 Click **Upd Item** to update the item record.
6 *Be sure to replace the original binding ticket with the new ticket.*

You can change other items or return to Title mode by selecting a Title key.

Removing an Item from a Lot

Sometimes it's necessary to remove a piece from a lot.

Removing a lot item is similar to changing a lot item; we begin by selecting the lot and changing our mode to Lot mode. We retrieve the piece using our selected key. To remove the item, however, we'll be using a menu option instead of a command button. We click the **Update** menu, click **Item**, and then click **Remove Item**. Then we click **Yes** to confirm that we want to remove the item.



Looking at the Lot window, we can see that the Item Count has been decreased by 1. It is important to note that the item number of the deleted item will not be reused – that number will always be skipped when new items are added to the lot.

Exercise: Removing an Item from a Lot

Follow the steps below to remove an item from a lot.

1 Use the Lot window to select the lot 100501M. Then select the Item key.

2 Enter **7** in the key entry field and press **ENTER**.

3 Click **Update > Item > Remove Item**.

4 Click **Yes** to confirm that you want to remove the item.

Open the Lot window to see how the Item Count has been decreased by one.

Chapter 10: Transferring Lots to the Bindery

The Bindery Transfer Window

Bindery Transfer gives us the option of sending our shipments by using either diskette, or by using FTP (file transfer protocol).

We'll click **Window > Bindery Transfer** to open the Bindery Transfer window.

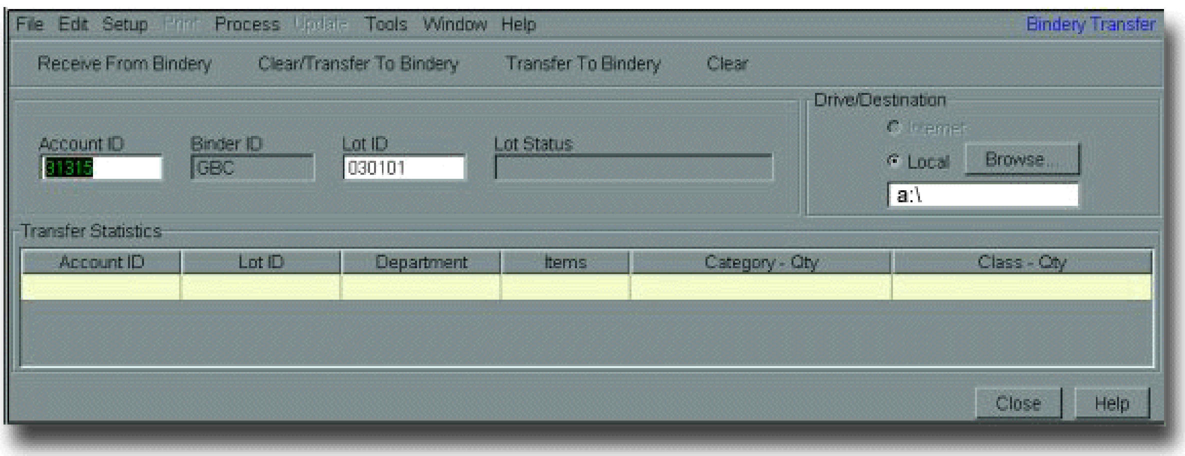
Transfer Functions

On our Bindery Transfer window, there are two functions that we use in transferring lots to the bindery: **1) Clear/Transfer To Bindery** and **2)Transfer To Bindery**. It's **important** to understand the differences between the two!

The **Clear/Transfer** function erases any previous lots in the destination area and then transfers the first lot of the new shipment. The **Transfer** function adds the selected lot to those that are already in the destination area.

You should always use **Clear/Transfer** for the first lot of a shipment, and **Transfer** for all subsequent lots in a shipment.

Sending Via Diskette



To send a shipment to the bindery using diskette, we…

1 Click **Window > Lot** to select the first lot if it is not already selected.

2 Insert a diskette into the computer's floppy drive.

3 Make sure the Drive/Destination's **Local** button is selected and that the correct drive letter is shown.

4 Click **Clear/Transfer to Bindery** for the first lot.

5 Select each additional lot and click **Transfer to Bindery**.

Sending Via FTP

Sending a shipment using FTP requires a two-step process.

Step 1 transfers the shipment files to an FTP staging folder on your computer or your network. Step 2 actually transfers the shipment files to the bindery's FTP site.

Note: To avoid overwriting files, we cannot send a new FTP shipment until the previous shipment has been received.

Follow these steps to send a shipment using FTP:

Step 1

1. Click on **Window > Lot** to select the first lot if it is not already selected.
2. Make sure the Drive/Destination's **Local** button is selected and that the correct FTP folder path is shown. (For local/network installations (non-Web) the path should be C:\ABLE\FTP. For ABLE Web installations, the path should be C:\ABLEFTP).
3. Click **Clear/Transfer to Bindery** for the first lot.
4. Select each additional lot and click **Transfer to Bindery**.
5. Record the lot names and piece counts on the ABLE Data Exchange Summary form.
6. Proceed to Step 2.

Step 2

Step 2 moves the lots that were transferred in Step 1 to the bindery's FTP site. It is important to complete this step in order for the bindery to receive your data.

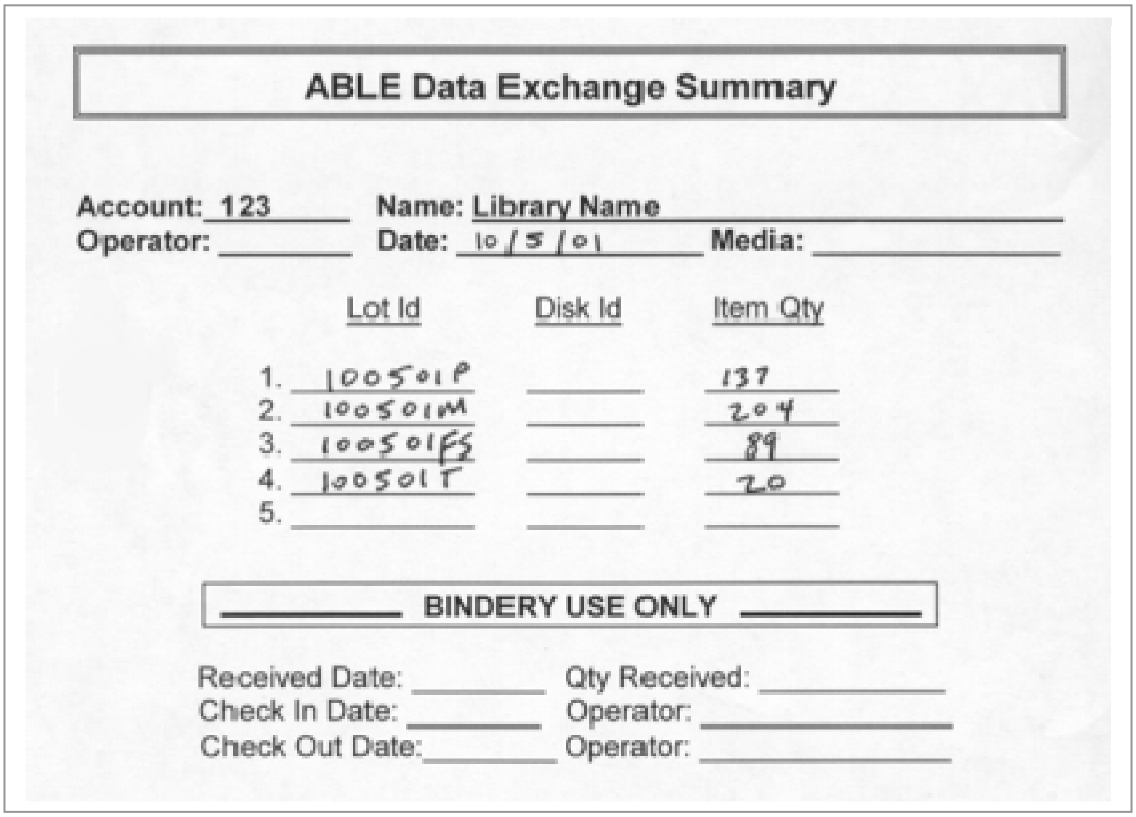
Double-click the ABLE FTP shortcut on your desktop to initiate the transfer to the bindery's FTP site.

The ABLE Data Exchange Summary Form

We use the ABLE Data Exchange Summary Form to tell the bindery about the lots we have sent.

We'll enter the name of the each lot, the diskette label (if used) and the number of items for each lot.

Include the Data Exchange Summary Form with your shipment.



ABLE Data Exchange Summary

Account: 123 **Name:** Library Name

Operator: ______ **Date:** 10/5/01 **Media:** ______

	Lot Id	Disk Id	Item Qty
1.	100501P		137
2.	100501M		204
3.	100501FS		89
4.	100501T		20
5.			

BINDERY USE ONLY

Received Date: ______ Qty Received: ______

Check In Date: ______ Operator: ______

Check Out Date: ______ Operator: ______

Packing Diskettes (if used)

Put the diskettes and Data Exchange Summary form in the diskette case provided.

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Chapter 11: Receiving Lots from the Bindery

In this chapter, we'll learn how to process shipments that have been returned from the bindery.

Using the Bindery Transfer window, we can receive shipments by diskette or by FTP. We must use the same method to receive a shipment as we used to send a shipment. That is, if we sent a shipment using FTP, we must receive the shipment using FTP.

Receiving Shipments from the Bindery Sent on Diskette

Diskette

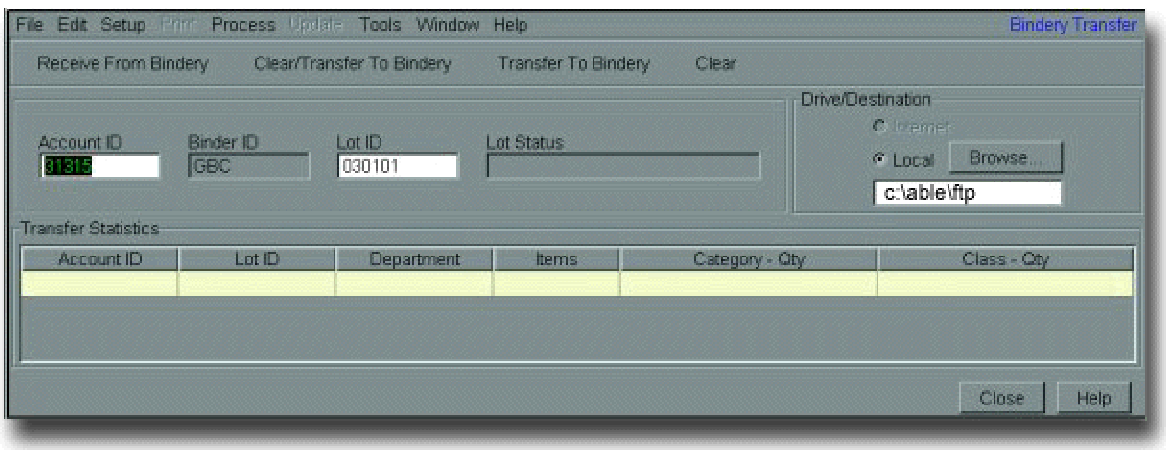
To receive shipments from the bindery using diskette, we…

1 Insert the diskette in our computer's floppy drive.

2 Make sure the Drive/Destination's **Local** button is selected and that the correct drive letter is shown.

3 Click **Receive from Bindery**.

We'll see the information about each lot in the shipment in the **Transfer Statistics** area.



FTP

To receive shipments from the bindery using FTP, we…

1 Make sure the Drive/Destination's **Local** button is selected and that the correct FTP folder path is shown (e.g. C:\ABLE\FTP).

2 Click **Receive from Bindery**.

We'll see the information about each lot in the shipment in the **Transfer Statistics** area.

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Chapter 12: Reports

ABLE's reporting feature allows us to view and print a variety of information about our titles, lots and formats

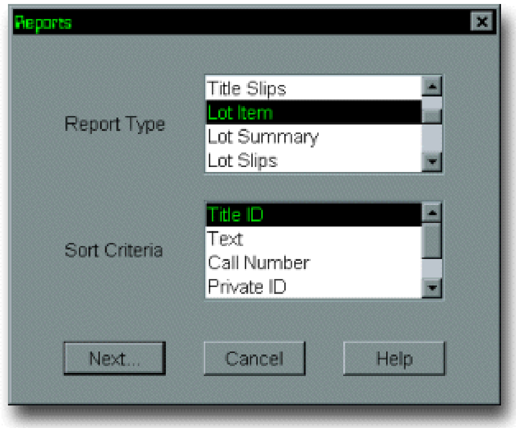
Report List

The following reports are available. In Appendix G of your manual, you will find detailed instructions for producing each report.

Report Name...	Containing...
Title Brief	One line of information for each title in the permanent database.
Title Full	Detailed information for each title in the permanent database.
Title History	Brief title information and complete history information.
Title Slips	One binding ticket for all titles in the permanent database.
Lot Item	Information about each item in the selected lots.
Lot Summary	Summary information about the selected lots.
Lot Slips	Binding slips for all items in a particular lot.
Format Brief	One line of information for each available format record.
Format Full	Detailed information about each available format record.
Lot Costing Detail	Detailed billing costs for a selected lot. *
Lot Costing Summary	Detailed billing costs for a selected lot. *
Lot Binding Statistics	Departmental billing statistics by lot. *
Monthly Binding Detail	Detailed billing costs for a selected month and year. *
Monthly Binding Summary	Summary billing costs for a selected month and year. *

* *Contact your bindery representative for further information about using these reports.*

Producing Reports: The First Report Window – Report Selection



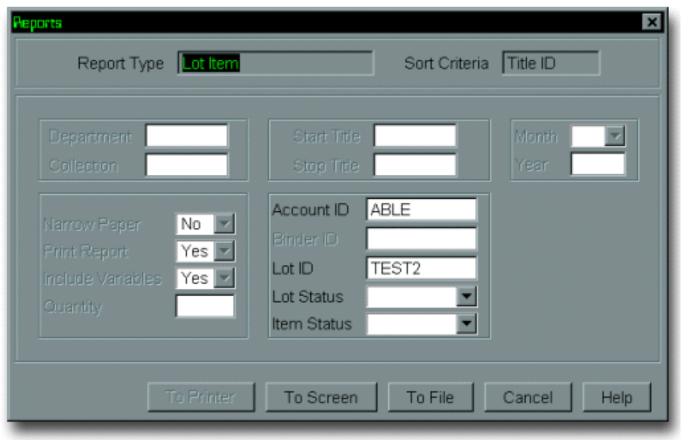
To produce reports, we…

1 Click on **Window > Reports** to open the first Reports window.

2 Choose a report from the **Report Type** box and the sorting criteria from the **Sorting Criteria** box.

3 Click **Next**.

Producing Reports: The Second Report Window – Report Criteria



4 On the second report window, we can change our account ID, or choose lot name and lot status criteria for lot-oriented reports.

5 Click **To Screen** to display the report online. A **Generating Report** window is displayed while the report is produced.

Note: the **To Printer** button is enabled for only the *Title Slips* and *Lot Slips* reports.

We can view the report online and we can click the **Print** button on the Internet Explorer window to produce a hardcopy report.

Demonstration: The Lot Item Report

The demonstration shows how we produce the Lot Item report.

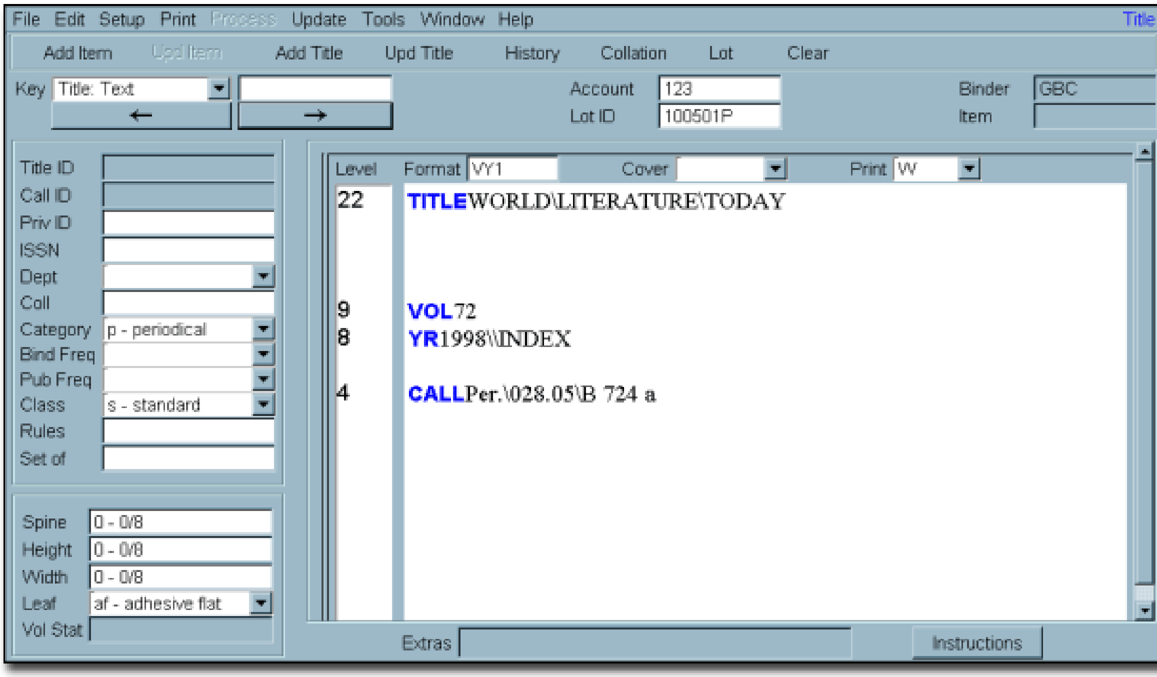
Chapter 13: Other Functions

This chapter addresses other functions that you will use in the course of the ABLE Library Binding Cycle:

Making One-time Changes to Periodical Titles

We can make one-time changes as we prepare a title for binding. In the example shown below, we've added the word INDEX to the variable.

To make the one-time change, we begin by retrieving the title from our database. After we enter the variable, we enter **\\INDEX** after the <u>year</u> data. Then we click **Add Item**. The item is added to our lot but the record in our permanent database is unchanged.



Making Permanent Changes to Periodical Titles

Making permanent changes to periodical titles is very similar to making one-time changes. We can make a permanent change to a title as we prepare the title for binding, or we can make the change as a separate step.

To make a permanent change, we begin by retrieving the title from our database. We make the change to the title and click **Upd Title**, which updates the record in our database. A message is displayed in the lower left corner of the screen indicating that the record has been updated.

We can then add the title to a lot or retrieve it later.

Adding a New Periodical Title to the Database

To add a new periodical title, the Key should be one of the Title keys.

Follow the steps below to add a new periodical title to the database:

1. **Tab** to the Format field and enter a periodical format code.
2. Select a cover (buckram) color.
3. Select a print (foil) color.
4. Click in the Level column and enter a starting slot for the title text. Press **Tab**.
5. Enter the appropriate text and variable prompts (see below), comments and/or special instructions and click on **Add Title**.
6. Click **Yes** on the "Are You Sure?" window.

We'll see a message in the lower left corner of our screen indicating that the title has been added.

Removing Title Records

Follow these steps to delete a title record:

1. Retrieve a title record from the database.
2. Click **Update > Title > Remove Title** or press **Alt + R**.
3. Click **Yes** to confirm that you want to delete the title.

A message will be displayed in the lower left corner of the screen indicating that the title has been removed.

NOTE: When a title is removed from the permanent database, its history is also removed.

Variable Prompts

Follow the steps below to add variable prompts:

1 Position the cursor where we'd like the variable prompt to be.

2 Right-click in the title text area and select **Variable** from the menu.

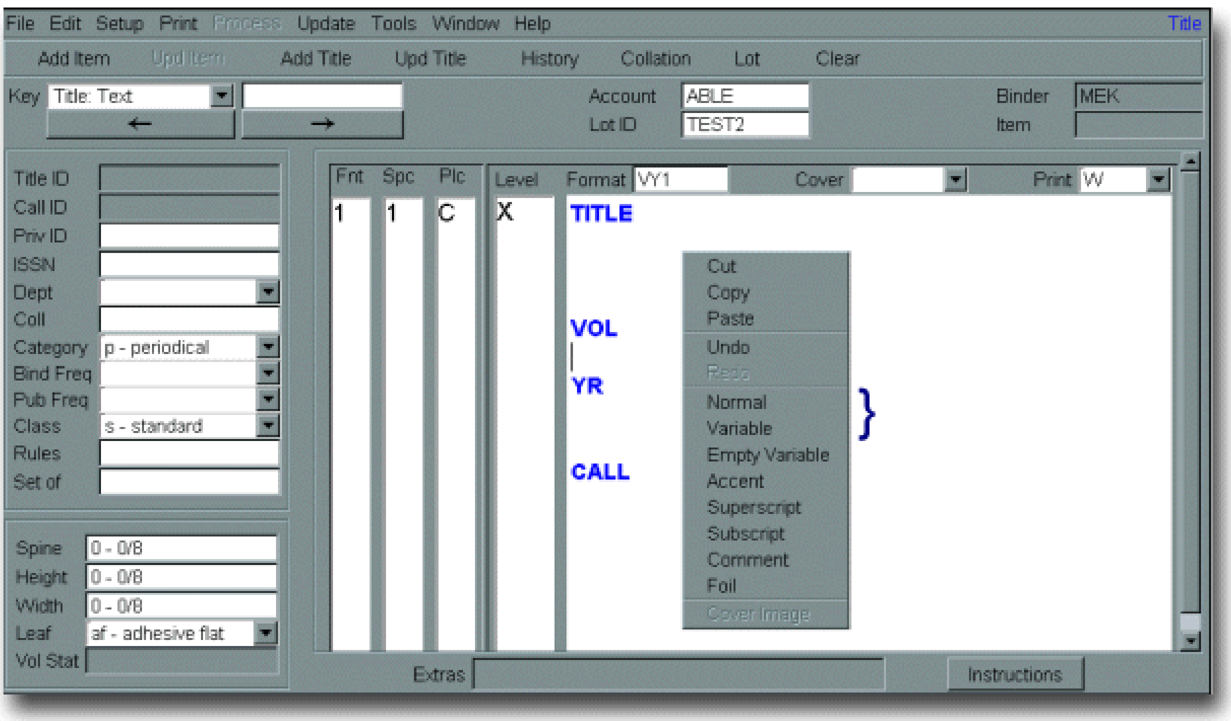
3 Type in the variable prompt.

The text should appear in a **bold blue** font. If the text is not blue then it is not a variable prompt and will appear on the spine, so we'll delete the text and repeat step 2.

4 Right-click again and select **Normal** from the menu.

5 Type any additional title text.

When we type, the text will appear in a **regular black font**. If the text is still blue then it is still a variable and will not appear on the spine, so we'll delete the text and repeat step 4.



Variable Prompt Demonstration

This demonstration shows how variable prompts are added to a title record.

Cover Proof

We can view the text that will appear on the spine by clicking **Cover Proof** to open the Cover Proof window.

The Cover Proof window can be used to proof the accuracy of text and the completeness of variables only. It does not represent the slot or level assignments.

To close the Cover Proof window, click on the **X**.

Note: You must close and reopen the Cover Proof window to display a different title image.

Sending Special Instructions to the Bindery

We now enter special instructions for the bindery that print on the binding ticket.

Follow the steps below to add special instructions:

1. Click on the **Special Instructions** button.
2. Type the instructions in the **Bindery** box.
3. Click **Apply**.
4. Click **Close**.

NOTE: Only the bindery box is available at this time. Future version will support the Temporary and Library boxes.

Special Instruction Demonstration

This demonstration shows how special instructions for the bindery are added to a lot item.

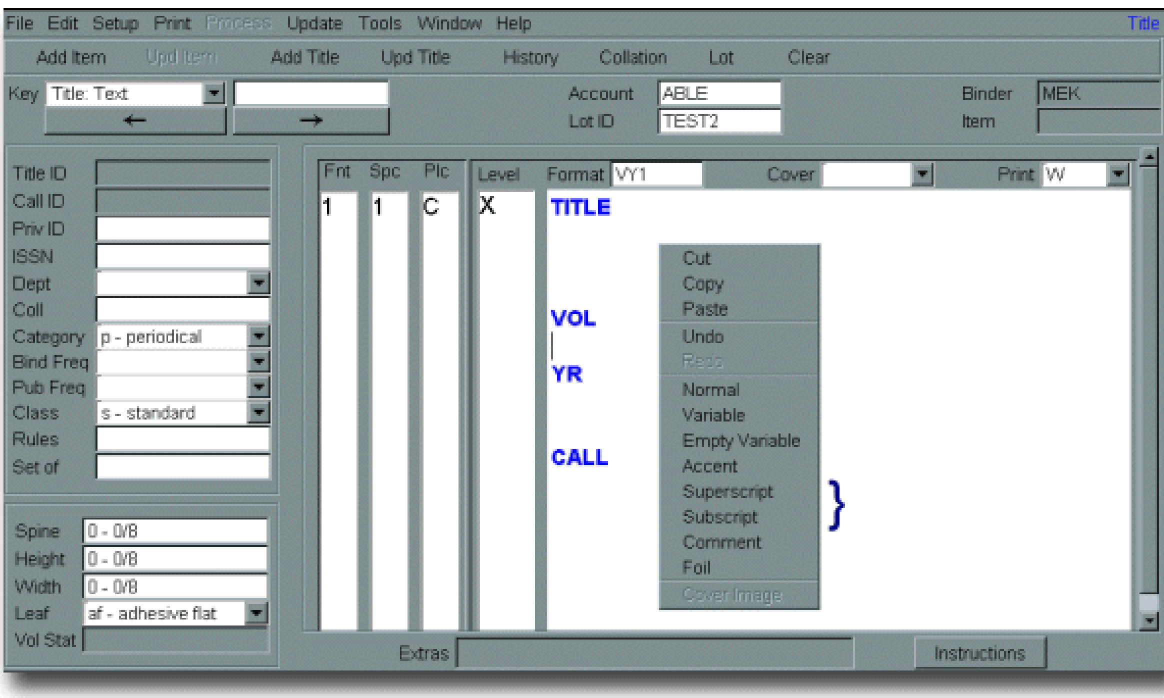
Entering Subscripts and Superscripts

Follow the steps below to add numerical (0-9) subscripts and superscripts to a lot item.

1. Position the cursor where we'd like the **subscript** or **superscript** to be.
2. Right-click in the title text area and select **Subscript** or **Superscript** from the menu.
3. Type in the text.

   The text should actually appear offset above or below the regular text.

   If it does not appear offset, then it is not a subscript or superscript and will appear on the spine as regular text. Delete the text and repeat step 2.
4. Right-click again and select **Normal** from the menu.
5. Type any additional title text.
6. When we type, the text will appear in-line with the regular text. If it does not, then it is still a subscript or superscript and will appear offset on the spine, so we'll delete the text and repeat step 4.



Subscript Superscript Demonstration

This demonstration shows how to enter subscripts and superscripts to a lot item.

Adding Comments for Library Use

Comments can be used to provide information about a title for library use. Comments do not appear on the binding ticket and they will not appear on the finished spine.

Follow the steps below to add comments:

1 Position the cursor where we'd like the comment to be.

2 Right-click in the title text area and select **Comment** from the menu.

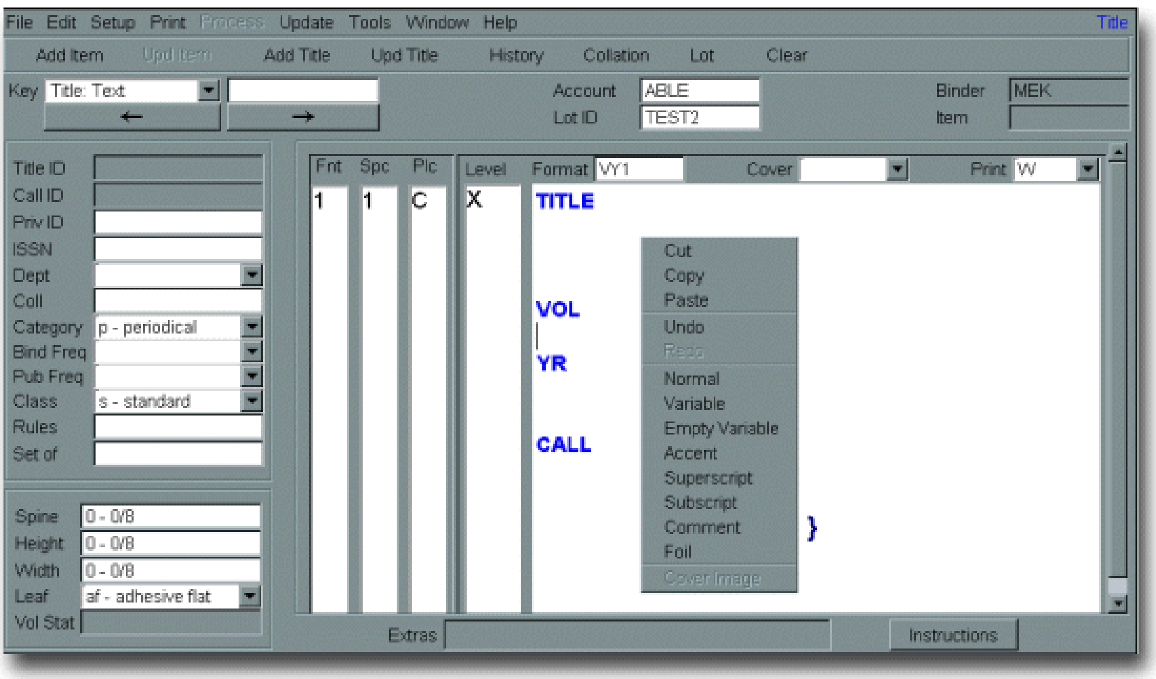
3 Type in the comment.

The text should appear in a **pink** font. If the text is not pink then it is not a comment and will appear on the spine, so we'll delete the text and repeat step 2.

4 Right-click again and select **Normal** from the menu.

5 Type any additional title text.

When we type, the text will appear in a **regular black font**. If the text is still pink then it is still a comment and will not appear on the spine, so we'll delete the text and repeat step 4.



Comment Demonstration

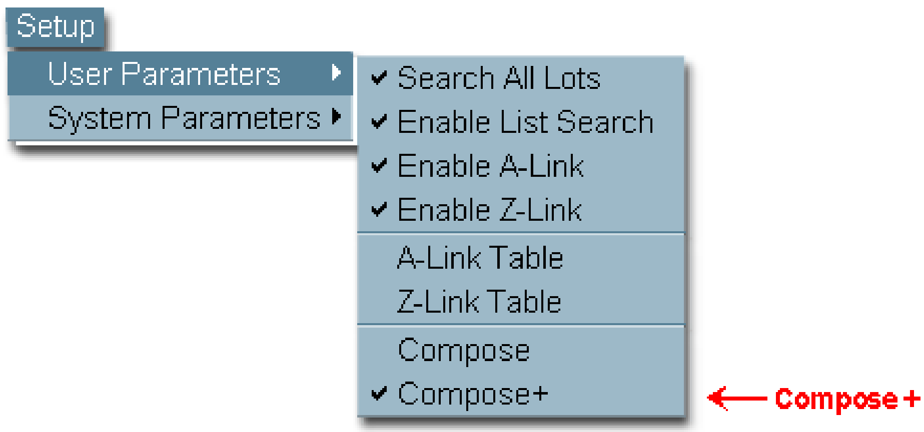
This demonstration shows how to add comments for bindery use.

Working with Similar Records Using Compose+

If you are working with similar sets of volumes that have the same, or very similar, lettering or structure, there is a feature you can use that will simplify the process of preparing these volumes. It's called **Compose +**.

Compose mode, rather than Compose +, is the default mode and this specifies that the screen is cleared each time you add, update or change a record. When you are using Compose + mode the screen is <u>not cleared,</u> making it very easy to prepare a set for binding, or to add a series of similar titles to the database.

To change to Compose + mode, click **Setup > User Parameters > Compose +**. The Compose + option will then have a check mark next to it as seen below:



To change back to **Compose** mode, click **Setup > User Parameters > Compose.**

Viewing History

We can view history in either text mode or lot mode.

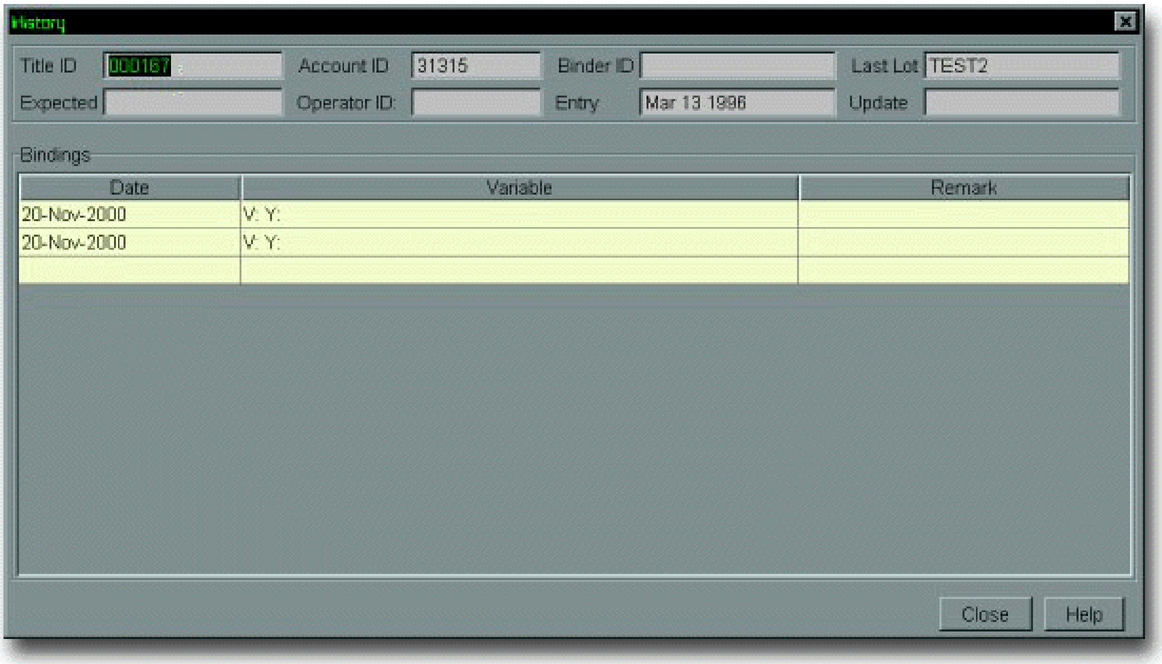
The history window shows the name of the binding date, the variable information for that binding and any remarks associated with the binding.

To view binding history for a periodical…

1 Retrieve the periodical from the database or select the item in a lot.

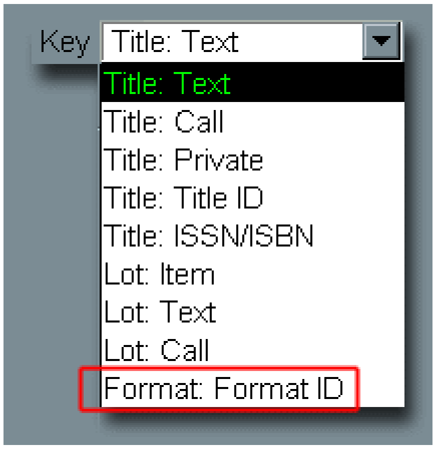
2 Click **History**.

3 Click **Close** to close the history window.



Working with Formats

If necessary, we can change our existing formats, add new formats or delete unused format.



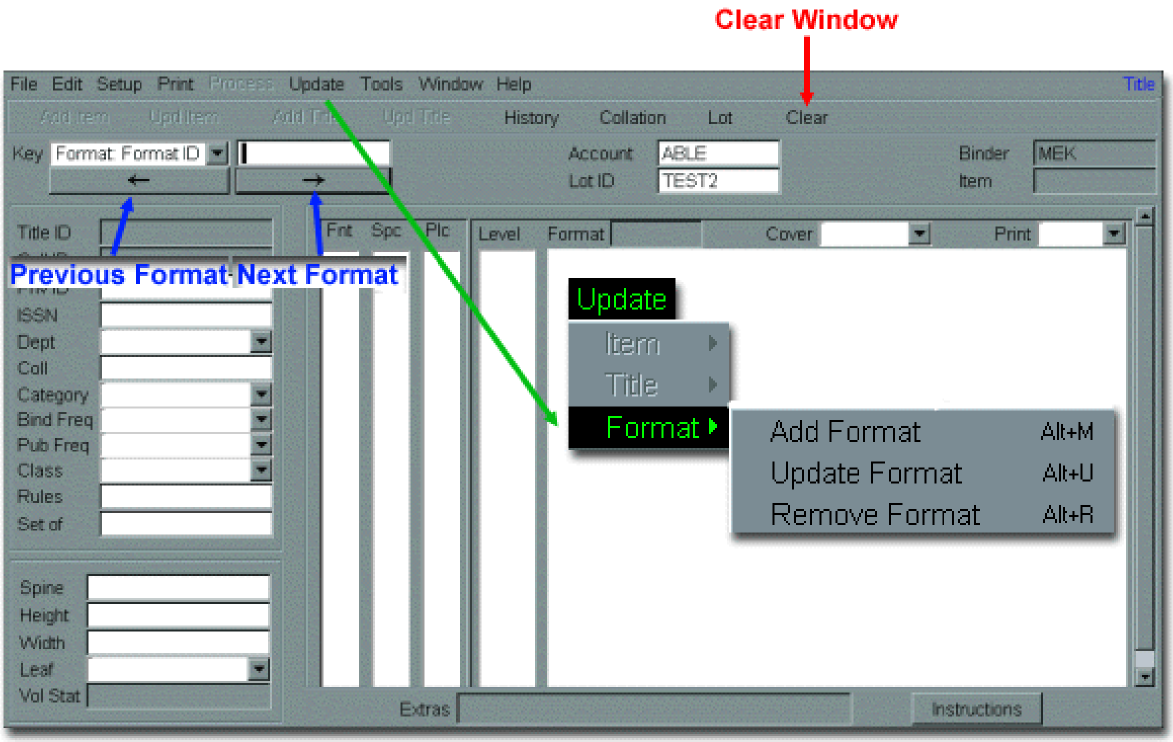
Accessing and Retrieving a Format Record

The first step is to select the **Format** key from the Key dropdown. Then we can retrieve formats using the same methods as we have used to retrieve title records.

Sequential Retrieval

Follow this step to retrieve format records using the sequential retrieval method:

- Leave the search data field blank and click on the **Next** button. This displays format records beginning with the first record in our database.



Sequential Matching Search

Follow the steps below to use the sequential matching search method.

1 Enter an exact or partial format code in the search data field.

2 Click on the **Next** button.

If there is an exact match, that format record is displayed.

If there is <u>not</u> an exact match, we'll see the next adjacent record. Use the **Next** and **Previous** buttons to find the specific record.

Adding a New Format Record

To add a new format record, follow the steps shown below:

1 Enter a format code and press **Tab**.

2 Click **Yes** to confirm that we want to create a new format.

3 <u>Optionally</u> select cover and print colors.

(If we don't specify these in the format, we'll need to supply them when we create a title or item record.)

4 <u>Optionally</u> enter a level number in the level column.

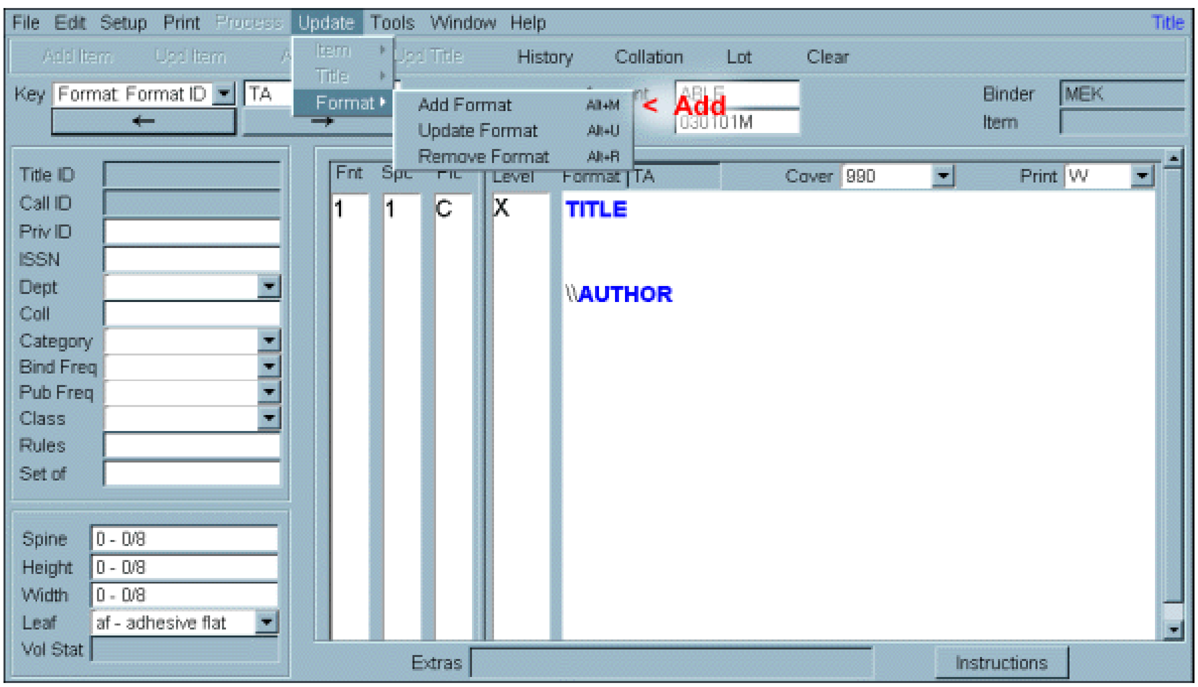
(This is usually left as an **X** in format records.)

Enter variable prompts, comments and/or special instructions.

5 Click **Update > Format > Add Format** or **Alt + M**.

6 Click **Yes** on the "Are You Sure?" window.

A message will be displayed in the lower left corner of the screen indicating that the format has been added.



Making Changes to a Format Record

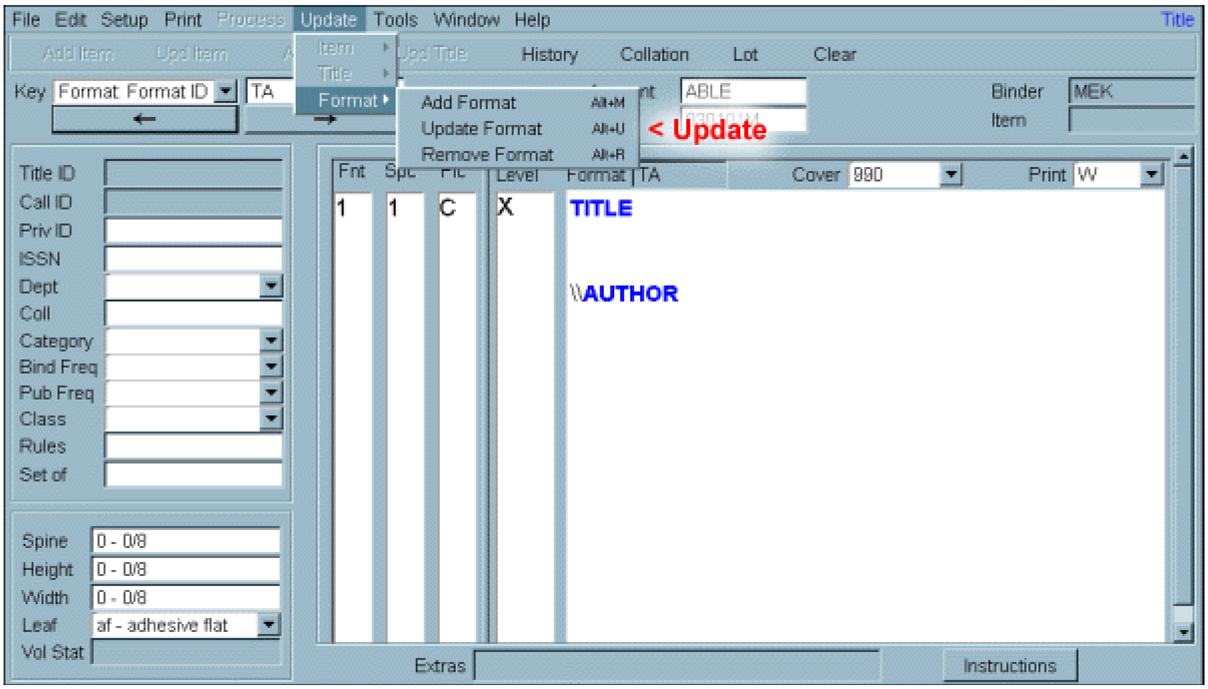
Follow these steps to make changes to a format record:

1 Retrieve a format record from the database.

2 Make changes to the format.

3 Click on the **Update > Format > Update Format** or press **Alt + U**.

A message will be displayed in the lower left corner of our screen indicating that the format has been updated.

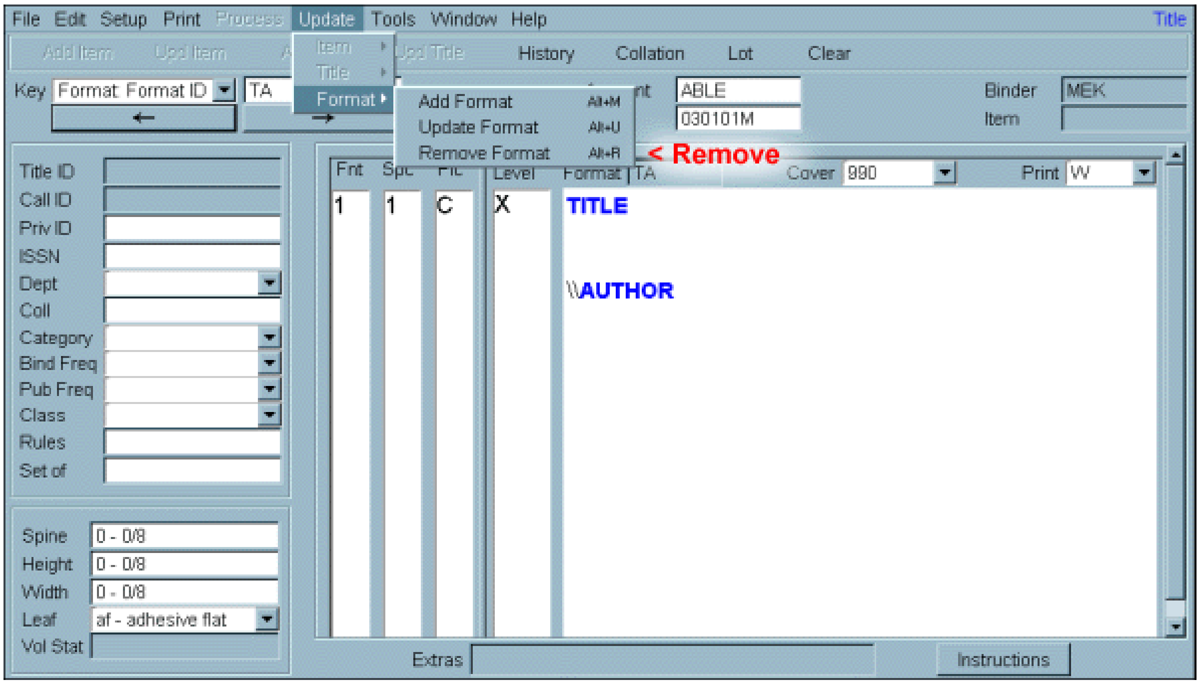


Removing a Format Record

Follow these steps to delete a format record:

1. Retrieve a format from the database.
2. Click **Update > Format > Remove Format** or press **Alt + R**.
3. Click **Yes** to confirm that you want to delete the format.

A message will be displayed in the lower left corner of the screen indicating that the format has been removed.



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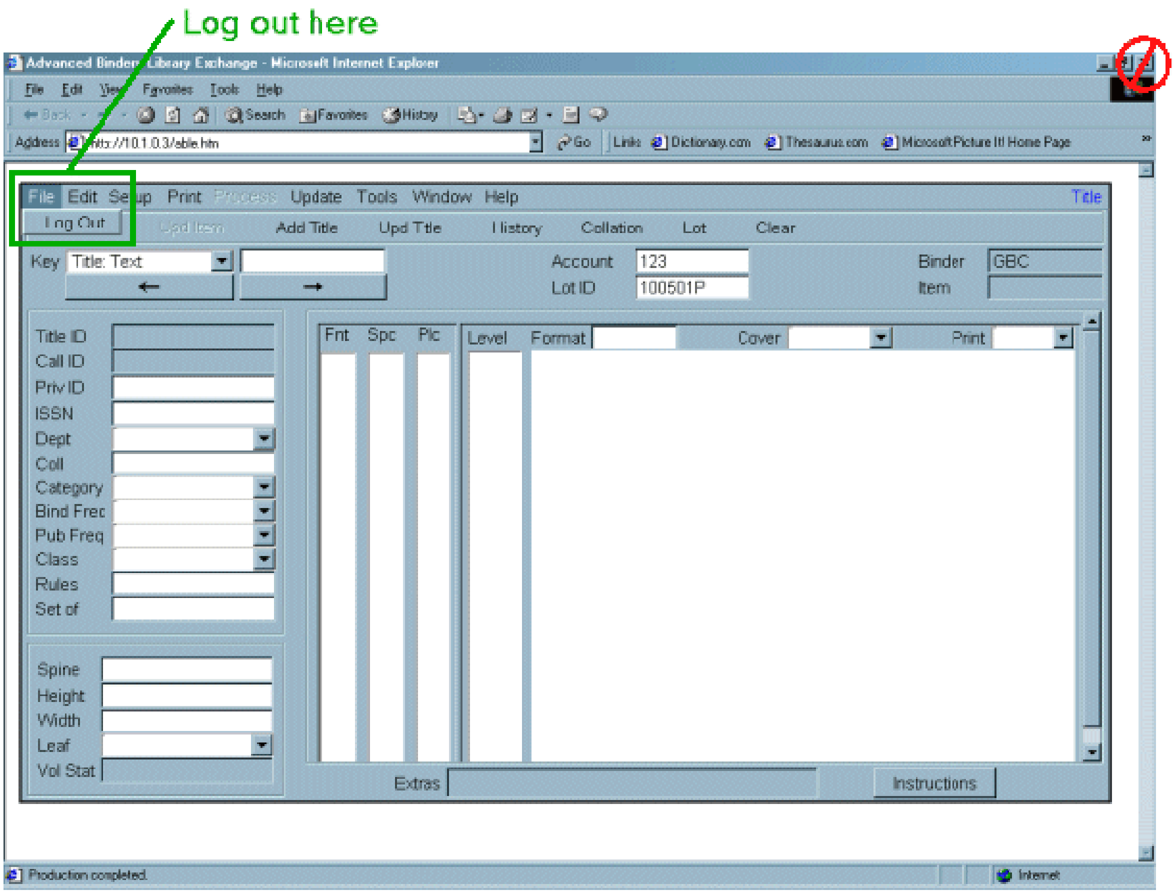
Chapter 14: Finishing Up

When you have finished using ABLE it's important to log out properly. Doing so saves your system settings and ensures that there will be no database conflicts during future sessions.

To log out of ABLE, click **File > Logout** in the ABLE (not the browser) window.



After you have logged out properly, you can close the browser window by clicking **File > Close** or by clicking on the **X**.

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Chapter 15: Additional Resources

Congratulations on completing the ABLE Online Training Course!

Please take note of the additional resources found in your Training Guide.

Appendix A: Maintenance Functions
- Backing up the Database
- Purging the Database

Appendix B: Category, Class and Lot Status Codes
- Category Codes
- Class Codes
- Lot Status Codes

Appendix C: Format Codes
- Standard Formats

Appendix D: Text Key Excluded Words

Appendix E: Z-Link Setup and Use
- Getting Ready to Use Z-Link
- Enabling Z-Link
- Selecting a Z-Link Mapping Table
- Configuring Our Database Information
- Opening the Z-Link Window
- Adding a Monograph to a Lot Using Z-Link

Appendix F: Glossary

Appendix G: Guide to Producing Reports

Appendix H: LARS-ABLE Terminology Comparison

Appendix J: A-Link

For additional assistance, you may send e-mail to our Technical Support staff at techsupport@thehfgroup.com, or call 800.444.5117 during normal business hours, Monday - Friday.

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Appendix A: Maintenance Functions

Backing Up the Database

ABLE Web users do not need to perform backups as these are done on our server.

If you are using ABLE on a network, check with you system administrator to make sure it is being backed up. If you have a standalone installation, i.e. on your PC's hard drive, it is important that you perform regular backups.

Your ABLE environment is extremely important and the protection of that data is equally important. While several means of backing up your database exist, one is presented here. Check with your organization's technical support staff if this option is not available.

Note: It is recommended that you maintain at least three levels of backups to ensure that you always have a current copy of your ABLE environment: Set #1 - Monday, Set #2 - Wednesday, Set #3 - Friday.

Windows Backup

To use Windows backup...

1 Click on **Start**, **Programs**, **Accessories**, **System Tools**, then **Backup.**

2 To perform the backup process, follow the procedures found in Microsoft's documentation or online help.

Note: In standalone installations, ABLE resides in C:\ABLE. In network installations, the drive letter will vary. In either case, you should ensure that the ABLE directory and all subdirectories are backed up.

Purging the Database

We use the purge program on a monthly basis to remove lots older than two months and extended history records that are older than three years.

To purge the database, we…

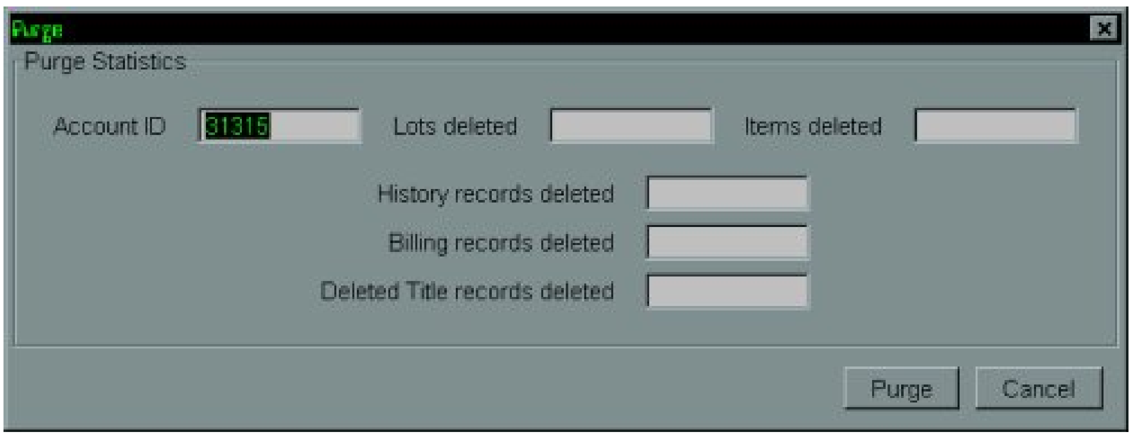
1 Click on **Window > File Maintenance > Purge**.

2 Click on the **Purge** button.

3 Click **Ok** on the date window.

4 When the purge is complete, click **Cancel** on the Purge Results window to view the purge statistics.

5 Click **Close** to return to Title Composition.



Appendix B: Category, Class and Lot Status Codes

Category Codes

Category codes describe the type of material to be bound.

Code	Description
01	Serial
02	Monograph
03	Paperback
04	Thesis
05	Archival Pak
06	Music
07	Newspaper
08	Special Report
FS	Paperback
M	Monograph
P	Periodical
T	Thesis

Class Codes

Class codes describe the process to be applied during binding.

Code	Description	
01	Excel-Custom	(Serials)
04	Excel-Standard	(Serials)
20	Custom	(Monographs)
21	Standard	(Monographs)
30	Cloth (Flex S)	(Paperbacks)
31	Mylar (Flex M)	(Paperbacks)
32	Pamphlet	(Paperbacks)
40	Dissertations	(Thesis)
50	Archival Pak - Standard	(Other)
51	Archival Pak - Custom	(Other)
60	Music	(Other)
70	Newspaper - Tabloid	(Other)
71	Newspaper - Regular	(Other)
80	Reports/Minutes	(Other)
C	Custom	
S	Standard	

Lot Status Codes

Status	Description
Lot created and ready for items	Lot Created and ready for Items or Items are being added.
Produced	Diskette: the lot is transferred to the diskette
	FTP: step 1 is complete for the lot
Restored	Restored
Returned	Returned

Appendix C: Format Codes

Standard Formats

The formats listed are available in the standard ABLE installation.

Format ID	Category	Prompts
ATFS	Flex S	[AUTHOR] \\ [TITLE]
AT1FS	Flex S	[AUTHOR] \\ [TITLE] [CALL]
TAFS	Flex S	[TITLE] \\ [AUTHOR]
TA1FS	Flex S	[TITLE] \\ [AUTHOR] [CALL]
TFS	Flex S	[TITLE]
T1FS	Flex S	[TITLE] [CALL]
A	Monograph	[AUTHOR]
ATM	Monograph	[AUTHOR] \\ [TITLE]
AT1M	Monograph	[AUTHOR] \\ [TITLE] [CALL]
TAM	Monograph	[TITLE] \\ [AUTHOR]
TA1M	Monograph	[TITLE] \\ [AUTHOR] [CALL]
TM	Monograph	[TITLE]
T1M	Monograph	[TITLE] [CALL]
ATT	Thesis	[AUTHOR] \\ [TITLE]
AT1T	Thesis	[AUTHOR] \\ [TITLE] [CALL]
TAT	Thesis	[TITLE] \\ [AUTHOR]
PVY	Periodical	[TITLE] [PGS] [VOL] [YR]
PVY1	Periodical	[TITLE] [PGS] [VOL] [YR] [CALL]
V	Periodical	[TITLE] [VOL]
V1	Periodical	[TITLE] [VOL] [CALL]
VMY	Periodical	[TITLE] [VOL] [MON] [YR]
VMY1	Periodical	[TITLE] [VOL] [MON] [YR] [CALL]
VPY	Periodical	[TITLE] [VOL] [PGS] [YR]
VPY1	Periodical	[TITLE] [VOL] [PGS] [YR] [CALL]
VXY	Periodical	[TITLE] [VOL] [MISC] [YR]
VXY1	Periodical	[TITLE] [VOL] [MISC] [YR] [CALL]
VY	Periodical	[TITLE] [VOL] [YR]
VY1	Periodical	[TITLE] [VOL] [YR] [CALL]
Y	Periodical	[TITLE] [YR]
Y1	Periodical	[TITLE] [YR] [CALL]

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Appendix D: Text Key Excluded Words

The following words are excluded in the construction of the Title Text key:

an	in
and	l’
at	la
by	las
das	le
der	les
die	lo
ein	of
eine	on
el	the
for	un
gl’	una
gli	une
il	uno

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Appendix E: Z-Link Table Setup and Maintenance

Z-Link is a tool that provides an interface between our Z39.50 database and ABLE.

Used primarily for monographs, Z-Link allows us to select titles in our Z39.50 database and import key information, such as title, author and call number directly into our ABLE lot. Formatting is applied as the data is imported.

Getting Ready to Use Z-Link

Before we can use Z-Link, there are three things we'll need to do:

1 Enable Z-Link

2 Select a Z-Link Mapping Table

3 Configure our Z-Link database information

Enabling Z-Link

To enable Z-Link, click on **Setup > User Parameters.** The option **Enable Z-Link** should have a check mark next to it. If it doesn't, click on **Enable Z-Link**.

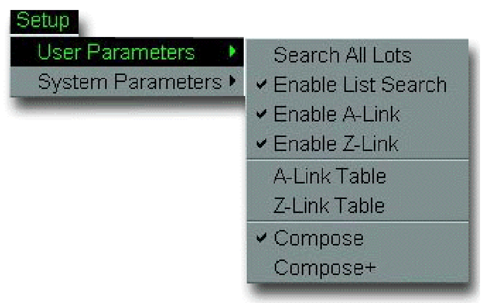
Selecting a Z-Link Mapping Table

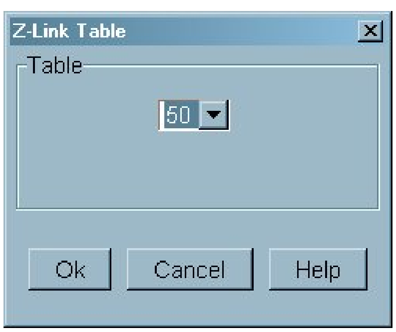
Next we'll select a Z-Link mapping table.

To select a particular table, click on **Setup > User Parameters > Z-Link Table**. In the drop-down list, we'll see one or more table names.

Tables that are created for you usually have numeric names, such as '50', '82' or '90'. These names represent the MARC fields/subfields that are mapped to the call number.

How do we know which one to use?



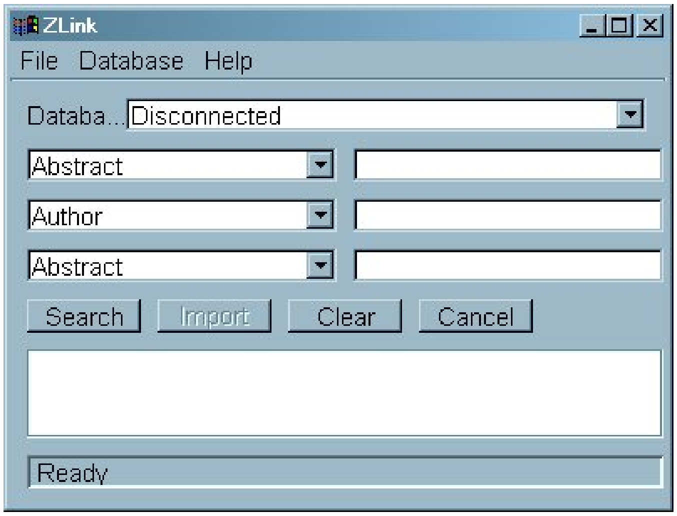


For example, if we know that our Z-39.50 database stores call numbers in the $050 fields, we'll want to select the table called **50**, and so on. If necessary, we can create additional tables.

Configuring Our Database Information

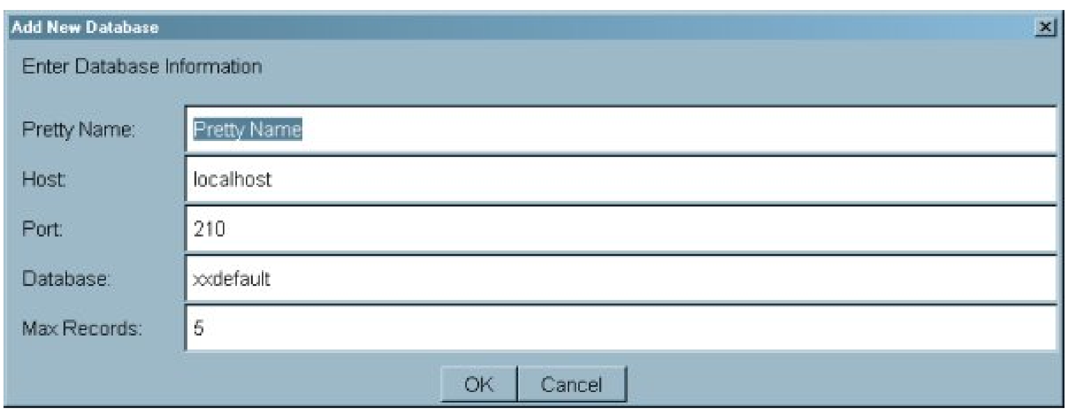
Opening the Z-Link Window

To configure our database information, we'll need to open the Z-Link window. We can do this in one of two ways: click **Window > Z-Link** or press **Alt + Z.**



Then, on the Z-Link window, we'll click **Database > Add**.

We'll enter a "Pretty Name" (the name that will appear in the database drop-down), the host name, the port and the database name. Click on **OK**. Click on Cancel to return to the main window.



Adding a Monograph to a Lot using Z-Link

To add monograph pieces using Z-Link, we…

1 Enter a format code in the **Format** field and press **Tab**.

2 Press **Alt + Z** to open the Z-Link window.

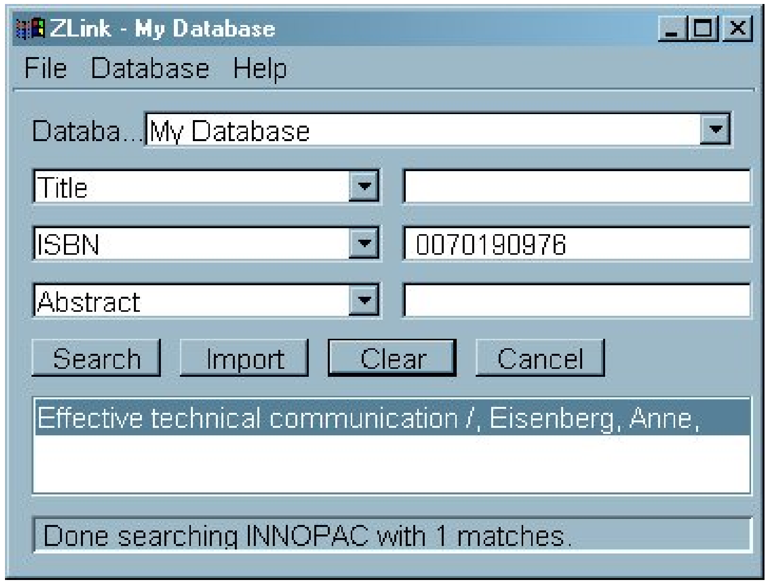
3 Connect to our database by selecting it from the **database pull-down** (first time only).

4 Select a search term from any of the three drop-downs. In this example, we've selected **ISBN**.

5 Enter the search criteria in the text box to the right of the selected search term.

6 Click on **Search**.

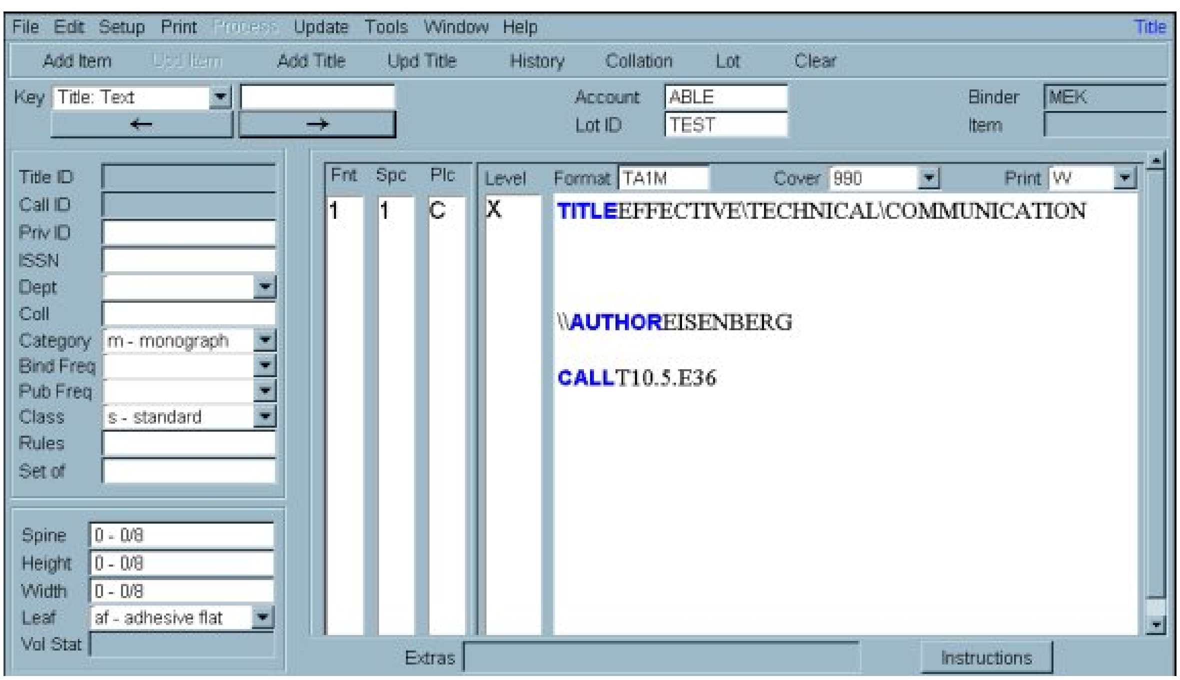
A results list is displayed.



7 Select an item in the results list and click **Import**.

As we can see, the title, author and call number are imported into our ABLE window, just as though we'd entered the text manually.

We'll edit the record, as needed, and click on **Add Item** to put the item into our lot.



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Appendix F: Glossary

Following are key terms that are used within this manual.

Format	A format, or format record, is a template that is stored in the ABLE database and is used to conserve keystrokes and optimize the process of creating title records. Formats typically contain such information as fonts; cover colors, print colors, etc.
Level	The position on the spine in which text is embossed. (Same as slot.)
Lot	A lot is a collection of volumes that are processed together as a unit. Multiple lots may be combined in a single shipment.
Item	An item is an individual volume that is included in a lot. A lot item may be a volume of any type: periodical, monograph, etc.
Permanent database	The permanent database is an internal data structure that acts as a repository for information that is accessed repeatedly by the ABLE system. The primary purpose of the permanent database is to store frequently accessed periodical title records however, other critical system information is stored there as well.
Retrieval key	Retrieval keys are values that are associated with title, format and item records. Title record retrieval keys include Title ID, Text, ISSN/ISBN, Call Number, and Private ID. The format record retrieval key is the Format ID and the item record retrieval key is the item number.
Shipment	A shipment consists of one or more lots that are sent to the bindery as a group.
Slot Guide	A slot guide is a chart used to indicate slots (fixed positions on the spine) in which text will be embossed.
Title Records	Title records are entries in the permanent database that provide all of the basic information about volumes that may be bound more than once. Title records include information similar to format records but also contain title text and prompts for variable information that is specific to the given volume.
UBS	A UBS, or Universal Binding Slip, is a printed multi-part or single form on which is printed all of the information needed for binding a particular volume. Binding slips are typically printed as volumes are prepared for binding.
Variable Data	Variable data is that which changes from binding to binding and is usually embossed mid-spine. Examples are volume, month, year, and pages.
Volume	A monograph, periodical, serial, paperback, etc.

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Appendix G: Guide to Producing Reports

Title Brief

The Title Brief report produces one line of information for each title contained in the permanent database for a selected account.

To produce this report...

1. Select **Title Brief** from the Report Type list.
2. Select a key value to be used in sorting the report (Title ID, Text, Call Number, Private ID, ISSN)
3. Click **Next…**
4. Enter values in the Department and Collection fields if you wish to produce a report for a specific department or collection. (Optional)
5. View or print the report:

   Click **To Screen** to view the report on the screen. You may select HTML or PDF format. You may print a hardcopy of the report from the screen display or you may save the output to a file by clicking **File > Save As…** and specifying a file name.

   Click **To File** to direct the contents of the report to a text file.

   The **To Printer** is not enabled for this report.

Title Full

The Title Full report produces complete title record information for each title contained in the permanent database for a selected account. Included are up to six history records for each title.

To produce this report...

1. Select **Title Full** from the Report Type list.
2. Select a key value to be used in sorting the report (Title ID, Text, Call Number, Private ID, ISSN)
3. Click **Next…**
4. You may optionally enter values in the Department and Collection fields to produce a report for a specific department or collection.
5. View or print the report:

   Click **To Screen** to view the report on the screen. You may select HTML or PDF format. You may print a hardcopy of the report from the screen display or you may save the output to a file by clicking **File > Save As…** and specifying a file name.

   Click **To File** to direct the contents of the report to a text file.

   The **To Printer** is not enabled for this report.

Title History

The Title History report produces brief information for each title contained in the permanent database for a selected account as well as full history information.

To produce this report...

1 Select **Title History** from the Report Type list.

2 Select a key value to be used in sorting the report (Title ID, Text, Call Number, Private ID, ISSN)

3 Click **Next…**

4 You may optionally enter values in the Department and Collection fields to produce a report for a specific department or collection.

5 You may optionally enter a beginning and ending title ID range.

6 View or print the report:

Click **To Screen** to view the report on the screen. You may select HTML or PDF format. You may print a hardcopy of the report from the screen display or you may save the output to a file by clicking **File > Save As…** and specifying a file name.

Click **To File** to direct the contents of the report to a text file.

The **To Printer** is not enabled for this report.

Title Slips

The Title Slips report produces binding tickets for all database titles for a selected account.

To produce this report...

1 Select **Title Slips** from the Report Type list.

2 Select a key value to be used in sorting the report (Title ID, Text, Call Number, Private ID, ISSN)

3 Click **Next…**

4 You may optionally enter values in the Department and Collection fields to produce a report for a specific department or collection.

5 You may optionally enter a beginning and ending title ID range.

6 Print the report:

Click **To Printer** to send print the binding tickets on your printer.

The **To Screen** and **To File are not enabled for this report.**

Lot Item

The Lot Item report produces a list of items in a specified lot. This report contains enough information to allow identification of the title record for each item. Summary information is also provided at the end of this report.

To produce this report...

1. Select **Lot Item** from the Report Type list.
2. Select a key value to be used in sorting the report (Title ID, Text, Call Number, Private ID, ISSN)
3. Click **Next…**
4. View or print the report:

   Click **To Screen** to view the report on the screen. You may select HTML or PDF format. You may print a hardcopy of the report from the screen display or you may save the output to a file by clicking **File > Save As…** and specifying a file name.

   Click **To File** to direct the contents of the report to a text file.

   The **To Printer** is not enabled for this report.

Lot Summary

The Lot Summary report produces header information about a specified lot.

To produce this report...

1. Select **Lot Summary** from the Report Type list.
2. Click **Next…**
3. By default, the report will be produced for the current lot as seen in the Lot ID field.

   To produce the report for all Produced or all Restored lots, delete the Lot name from the Lot ID field and select Produced or Restored from the Lot Status dropdown.
4. View or print the report:

   Click **To Screen** to view the report on the screen. You may select HTML or PDF format. You may print a hardcopy of the report from the screen display or you may save the output to a file by clicking **File > Save As…** and specifying a file name.

   Click **To File** to direct the contents of the report to a text file.

   The **To Printer** is not enabled for this report.

Lot Slips

The Lot Slips report produces binding tickets for all database titles for a selected account.

To produce this report...

1 Select **Lot Slips** from the Report Type list.

2 Select a key value to be used in sorting the report (Item ID, Text, Call Number)

3 Click **Next…**

4 You may include or omit variables; select **Yes** or **No** from the **Include Variables** dropdown.

5 Print the report:

Click **To Printer** to send print the binding tickets on your printer.

The **To Screen** and **To File are not enabled for this report.**

Format Brief

The Format Brief report produces one line of information for each format contained in the database.

To produce this report...

1 Select **Format Brief** from the Report Type list.

2 Click **Next…**

3 View or print the report:

Click **To Screen** to view the report on the screen. You may select HTML or PDF format. You may print a hardcopy of the report from the screen display or you may save the output to a file by clicking **File > Save As…** and specifying a file name.

Click **To File** to direct the contents of the report to a text file.

The **To Printer** is not enabled for this report.

Format Full

The Format Full report produces complete information for each format contained the permanent database.

To produce this report...

1 Select **Format Full** from the Report Type list.

2 Click **Next…**

3 View or print the report:

Click **To Screen** to view the report on the screen. You may select HTML or PDF format. You may print a hardcopy of the report from the screen display or you may save the output to a file by clicking **File > Save As…** and specifying a file name.

Click **To File** to direct the contents of the report to a text file.

The **To Printer** is not enabled for this report.

Monthly Binding Detail *

Monthly Binding Summary *

Lot Costing Detail *

Lot Costing Summary *

Lot Binding Statistics *

* Contact Technical Support for further information about using these reports.

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Appendix H: LARS-ABLE Terminology Comparison

For new ABLE users who have previously used LARS, the following table compares the terminology between the two products:

LARS	ABLE
Job	Lot
Piece	Item
Title style	Format
Slot	Level
Material	Cover
Foil	Print
Justification	Placement (Plc)
Binding Ticket	UBS (Universal Binding Slip)
Short Title	Text Key

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Appendix J: A-Link

A significant feature of ABLE™ 6 is the A-Link Import Service.

A-Link allows any item (periodical, monograph, thesis, etc.) to be searched and retrieved into an ABLE™ lot. A-Link is based on the Z39.76 ANSI/NISO standard for library/bindery data exchange and has data editing properties similar to Z-Link.

In order to use A-Link, the library is required to prepare one or more specially formatted data files.

A-Link Data Requirements

A-Link expects an ASCII text file with a recommended file extension of 'txt'.

The file layout is any number of records, each delimited by an End of Record sequence: Carriage Return (ASCII 13) and Line Feed (ASCII 10).

Each record contains a sequence of fields (detailed below) and each field is separated by an End of Field sequence: Horizontal Tab (ASCII 9).

Note that the End of Field sequence may be used as a separator to allow the importation of data as exported from a Microsoft Excel spreadsheet, if desired.

Each field is detailed on the following page (variable maximum lengths and valid character labels are explained).

A-Link Fields

Field	Name	Description	Min Length	Max Length	Valid Characters
1.	Title ID (Library)	Library Title ID	1	6	Numeric
2.	Title ID (Bindery)	Bindery Title ID	1	6	Numeric
3.	Library Bar Code	Library Bar Code	1	13	Line Printable
4.	ISSN/ISBN	ISSN (Serials)/ ISBN (Monographs)	1	13	Line Printable
5.	Title	Title Text	0	500*	Line Printable
6.	Sub-Title	Sub-Title Text	0	500*	Line Printable
7.	Author	Author	0	500*	Line Printable
8.	Series	Variable Info: Series	0	500*	Line Printable
9.	Volume	Variable Info: Volume	0	500*	Line Printable
10	Number	Variable Info: Number	0	500*	Line Printable
11.	Months	Variable Info: Months	0	500*	Line Printable
12.	Year	Variable Info: Year	0	500*	Line Printable
13.	Page Numbers	Variable Info: Page Numbers	0	500*	Line Printable
14.	Abstract Numbers	Variable Info: Abstract Numbers	0	500*	Line Printable
15.	Call Number	Call Number	1	15	Line Printable
16.	Lot ID	Shipment (Lot) Number	1	8	Line Printable
17.	Date Sent	Date Sent to Binder	1	11	Line Printable
18.	Date Expected	Expected Return Date	1	11	Line Printable
19.	Date Returned	Date Returned to Library	1	11	Line Printable
20.	Department	Department (Library Location)	1	6	Line Printable
21.	Collection	Collection	1	6	Line Printable

* An additional restriction is that the sum of field lengths (fields 5 through 14) must not exceed 500 characters.

The valid character labels are as follows:

Numeric Include the ten digits 0 through 9

Line Printable Include any ASCII characters between 32 (space) and 126 (tilde)