

# BTCAT USER GUIDE

*Release 8.0*

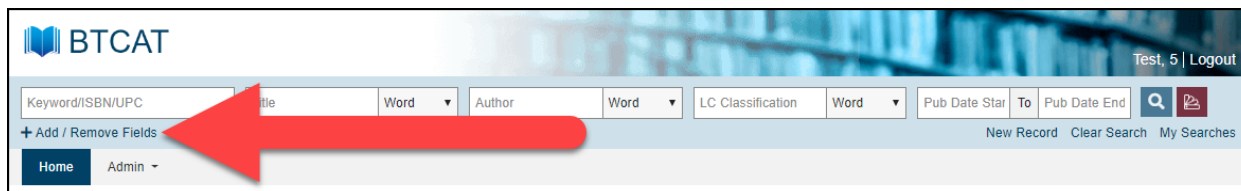
## Contents


Search for a MARC Record	2
Select Your Search Fields	2
Select Your Catalog	4
Search for a Record	4
Viewing Your Search Results	5
Facet Your Results	6
Clear Your Search	7
View Your Search History	7
Best Records	8
The BTCAT Community Database	9
The Branch Record Count Column	10
Navigation	11
Keyboard Navigation	11
Create a New MARC Record	12
Reserved Tags	12
Entering Information	13
Add Notes to a MARC Record	14
Macros	15
Validate Authority	16
Saving Your New MARC Record	17
Compare Two or More MARC Records	18
Save Your Changes	20
Merge Records	20
Edit an Existing Record	22
Opening Multiple Tabs in the Editor	24
View Record History	25
Clone a Record or Template	26
Alerts	26
Folders	27
Customer Configuration – Batch Search Folder Settings	31
Admin	32
Create, Edit, or Delete a MARC Template	32
Extract	33
Batch Search	35
Create and Edit Macros	39
User Report	40
User Preferences	41
Customer Configuration Export	42
Customer Configuration TechXpress	42

## Search for a MARC Record

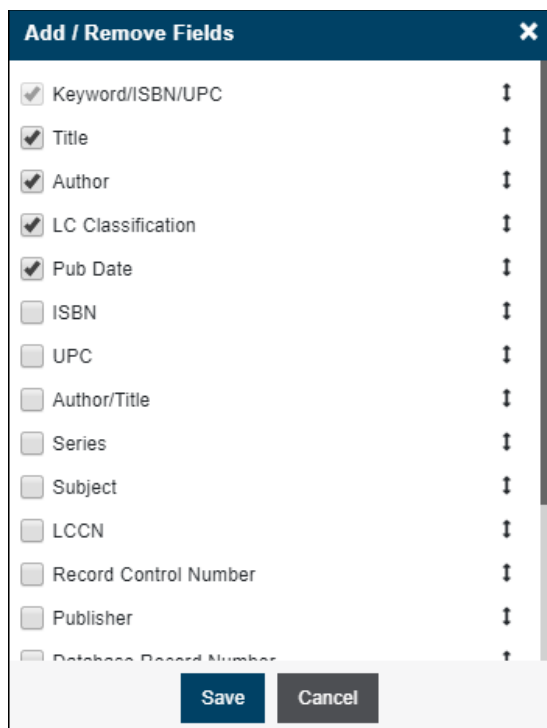
### Select Your Search Fields

By default, **Keyword/ISBN/UPC**, **Title**, **Author**, **LC Classification**, **Pub Date Start**, and **Pub Date End** search fields will display for searching within BTCAT. You can select more fields for your search by clicking on the **+Add/Remove Fields** link.



Select and/or deselect the fields you want to use for your search on the Add/Remove Fields pop-up window. The only required field is **Keyword/ISBN/UPC**. To rearrange the order your search fields will display on the main page, click on the **arrow icons**  to move a field up or down in the list.

Once you are done making your selections, click **Save**.



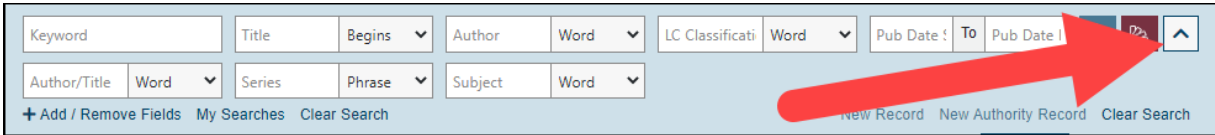
You can search for terms via a **Word** (search will look for each word individually) or **Phrase** (search will look for all elements in the phrase together), and in some cases, by an **Exact** search term by selecting the associated drop-down option next to the associated search field. To search for more than one item within the

**Keyword/ISBN/UPC, Database Record Number and Record Control Number** fields, enter a **space** between your entries.

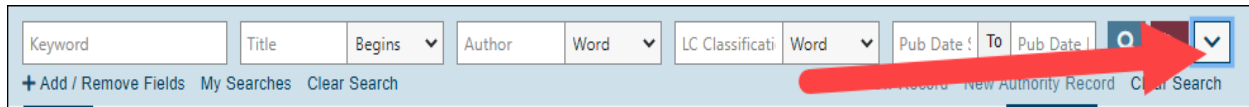
Select from the following fields:

- **Keyword/ISBN/UPC** – Enter either a keyword, ISBN, or UPC. Look for multiple items at once (an AND search) by placing a space between the search terms. When using a Z39 profile or a hybrid search, you can only enter a single term. Please note that when using a Z39 profile, Keyword will work for the use it was assigned to within the profile: e.g., Record Control Number or Number Publisher for music.
- **Title** – Enter a word or phrase. You can use **Begins** to look for the search term at the beginning of each title field. Up to 300 characters can be entered here. If you turn off all Z39 databases, you can search by **Heading**, which will let you search by Authority Headings.
- **Author** – Enter a word or phrase. If you turn off all Z39 databases, you can search by **Heading**, which will let you search by Authority Headings.
- **LC Classification** – Enter a word or exact classification. **Exact** will look for the entire LC number; if you are searching for a Partial classification, a **Word** must be used.
- **Pub Date** – Enter a date range in these fields; or, to search a single date, enter that date in the **Pub Date Start** field
- **ISBN** – Enter the ISBN you wish to search for. Look for multiple items at once (an AND search) by placing a space between the search terms. Please note that when using a Z39 profile or a hybrid search, you can only look for one item at a time. If you search for a 10-digit ISBN, the associated 13-digit ISBN will display in your search results, and vice versa.
- **UPC** – Enter the UPC you wish to search for. Look for multiple items at once (an AND search) by placing a space between the search terms. This field is not available for Z39 profiles.
- **Author/Title** – Enter a full or partial author name and/or a title. If you are entering both, they should be separated by a forward slash, e.g., Lewis/Fathom.
- **Series** – Enter a word or phrase. If you turn off all Z39 databases, you can search by **Heading**, which will let you search by Authority Headings.
- **Subject** – Enter a word or phrase. If you turn off all Z39 databases, you can search by **Heading**, which will let you search by Authority Headings.
- **LCCN** – Library of Congress Control Number.
- **Record Control Number** – Searches the 001 MARC field. Look for multiple items at once (an AND search) by placing a space between the search terms. In a Z39 search, the system will look at the 010 tag. Please note that when using a Z39 profile or a hybrid search, you can only look for one item at a time.
- **Publisher** – Enter a word or phrase.
- **Database Record Number** – The BTCAT system-generated record number. Look for multiple items at once (an AND search) by placing a space between the search terms. This field is not available for Z39 profiles.
- **Dewey Abridged** – If your library uses the abridged version of the Dewey Decimal System, use this field to search for Dewey numbers.
- **Dewey Unabridged** – If your library uses the full version of the Dewey Decimal System, use this field to search for Dewey numbers. This field is not available for Z39 profiles.
- **ANSCR** – Enter the exact ANSCR code, or a word. This field is not available for Z39 profiles.
- **ISSN** – Enter the exact ISSN, or a word.

If you have a lot of search fields selected, you may want to collapse your search bar by clicking on the **up arrow icon** at the top of the page. Collapsing your search bar will display only the first row of search fields.




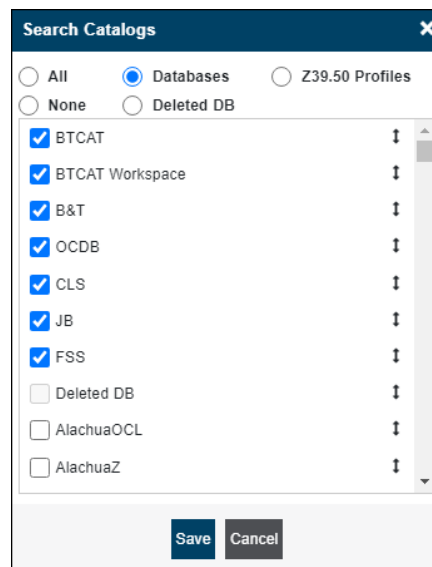
Uncollapse the search bar by clicking on the **down arrow icon** to reveal all search fields again.




A dark blue box will display around any search fields you used to search so you can easily see which fields brought forth results. This bounding box will display for Z39 fields that were used to search as well.

## Select Your Catalog

Click on the **book icon**  to select the catalogs you wish to search. You can select from local databases, as well as Z39 profiles. Deselect all databases to easily select only the databases you need. Please note that if you select Z39 profiles, you will not be able to use any facets when viewing search results.



## Search for a Record

Once you've selected the fields you want to use for your search, enter your search terms in the related fields and then click the **magnifying glass icon** , or press **Enter** to initiate your search.

## Viewing Your Search Results


The screenshot shows the BTCAT search results interface. At the top, there is a search bar with the word 'war' and various filters. Below the search bar, there are navigation options like 'Home', 'User Settings', and 'Customer Settings'. The main area displays a table of search results with columns for Title, Author, Pub Date, Record Number, and Record Source. A detailed bibliographic record is shown below the table, with filter options on the left side of the page.


Title	Author	Pub Date	Record Number	Record Source
<input type="checkbox"/> The Black Flamingo / Dean Atta.	Atta, Dean.	2020	6972698	BTCAT Works
<input type="checkbox"/> Use the force! : discover what it takes to be a...Jedi / written by Chris...	Blauvelt, Christian,	2020	6970231	BTCAT Works
<input type="checkbox"/> A cry in unison / Judy Cohen.	Cohen, Judy Weissenberg, 1928-	2020	6971499	BTCAT Works

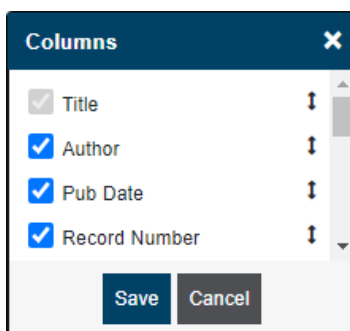
**Bibliographic Record**

000 cam a i  
001 on1143303458  
003 OCoLC  
005 20200601124542.8  
008 200601t20202019nyu 000 1 eng d  
010 #aon1143303458  
040 #aNHP#beng#erda#cNHP#dOCLCQ#dIEB  
020 #a9780062990297  
020 #a0062990292  
035 #a(OCoLC)1143303458  
037 #bHarpercollins Childrens Books, Attn Elaine Nealon 53 Glenmaura National Blvd Ste 300, Moosaic, PA, USA, 18507-2132#nSAN 200-2086  
100 1 #aAtta, Dean,#eauthor.  
245 14 #aThe Black Flamingo /#cDean Atta.  
250 #aFirst U.S. edition.  
264 1 #a[New York] :#bBalzar + Bray, an imprint of HarpercollinsPublishers#c2020.  
264 4 #c2019 :  
300 #a403 pages ;#c22 cm

By default, the **Title, Author, Pub Date, Record Number, and Record Source** display as column headers (1) in

your search results. You can add and remove columns by clicking on the **Search Columns** icon . The selected bibliographic record (2) displays at the bottom of the page, with filter options (3) displaying on the left side of the page. Please note that filters will not display if you have a Z39 profile selected for searching.

Select and deselect column headers on the Columns pop-up window. The only column you must include is **Title**. To rearrange the order your columns will display on the main page, click on the **arrow icons**  to move a column name up or down in the list.



If you have selected more than one database when performing a Z39 or hybrid search, you can view search results by database by clicking directly on the **database link** at the top of your search results. If no results are found, the database name will display in red. To remove a database source from your search results, unclick the checkbox next to the associated database link.

<input type="checkbox"/> Title	Author	Pub Date	Record Number	Record Source
<input type="checkbox"/> Corals / Mari Schuh.	Schuh, Mari C., 1975-	2021	4668177	ALEXMAIN
<input type="checkbox"/> Crocodile hatchlings / by Genevieve Nilsen.	Nilsen, Genevieve,	2021	4674708	ALEXMAIN
<input type="checkbox"/> Curious about dolphins / by Annie C. Holdren.	Holdren, Annie C. (Annie Cody),	2021	4694843	ALEXMAIN
<input type="checkbox"/> Manatees / by Mari Schuh.	Schuh, Mari C., 1975-	2021	4665727	ALEXMAIN

## Facet Your Results

Utilize the **Refine Your Search** area (not available in Z39 profiles) to filter your search results. Click directly on a filter result to view the associated records.

**Refine Your Search**

**Pub Date**

2017 (39629)

2018 (37212)

2015 (37085)

[Show more](#)

---

**Format**

BOOKS ONLY (644841)

eBOOK (112731)

DVD (30209)

[Show more](#)

---

**Subject**

Audiobooks. (37020)

Feature films. (25356)

Video recordings for the hearing impaired. (23797)

[Show more](#)

---

**Author**

Findaway World, LLC. (2941)

Playaway Digital Audio. (2750)

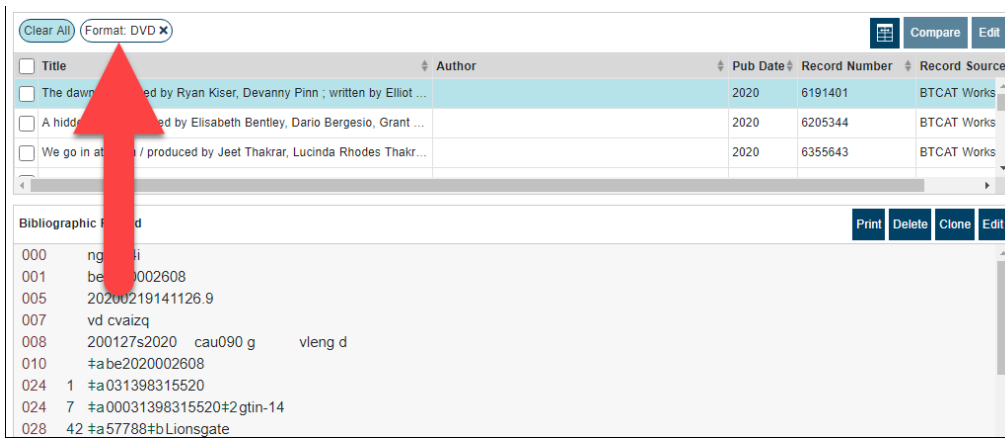
Warner Home Video (Firm). (2060)

[Show more](#)

---

**Series**

Any filters you have selected from Refine Your Search will display at the top of the page. To remove a filter, click on the **X** next to the filter name. Click **Clear All** to remove all of your filters and return to the complete list of search results.

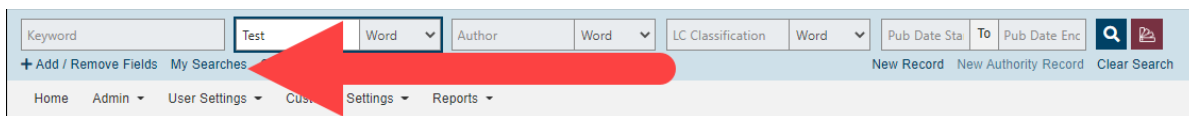


## Clear Your Search

To clear your search results and any search terms you've already entered at the top of the screen, click **Clear Search**.

## View Your Search History

Up to 30 searches are saved automatically. To view your previous searches, click **My Searches**.



A list of your previous searches displays. Double-click directly on a search result to perform that search again.

Search Criteria	Search Modifiers	Search Catalogs
Title / Word = "such a fun age"		Gail Borden, Skyriver, Local Workspace, BTCAT, JB
Title / Begins = "hush"		Gail Borden, Skyriver
Title / Begins = "such a fun age"		Gail Borden, Skyriver
Title / Begins = "summer house"		
Pub Date = "2020"		Local Workspace, BTCAT, JB
Publisher / Word = "little"		
Title / Begins = "summer house" Author / Word = "patterson"		Local Workspace, BTCAT, JB
Title / Begins = "such a fun age"		Local Workspace, BTCAT, JB
Title / Word = "lost girl"		Gail Borden, Skyriver, Local Workspace, BTCAT, JB
Title / Word = "fault in our stars"		Gail Borden, Skyriver, Local Workspace, BTCAT, JB
Keyword/ISBN/UPC = "fault in our stars"		Gail Borden, Skyriver, Local Workspace, BTCAT, JB
ISBN = "9781630060886"		Gail Borden, Skyriver, Local Workspace, BTCAT, JB

# Best Records

BTCAT will display the “best record” at the top of your search results. Criteria for what is considered a best record is set at your organization’s level. Best records will display with a green dot next to them in both search results and when you compare two or more records.

- Green records are the most complete records available.
- Yellow records are the second most complete records available.
- Red records are typically those records that are minimal, or in a different language than the item itself.

Below is how the system determines which record is considered a best record by BTCAT:

- If the record source falls in your preferences and the encoding level among all the different sources, the source outweighs encoding level. For example, if a core-level record is in your highest-preferred source, but a full-level record is in the source third on your list, the system will prefer the core level as long as the additional criteria are met.
- In order to be automatically saved, a best record must have at least four total of the preferred fields and at least two of the top four by preference.
- If you have *No. of customers who saved the record* among your best record preferences, the system will add a bit more intelligence behind your search results. The database keeps track of which control number is saved most often per ISBN/UPC/etc., and the higher that number goes, the more weight the matching bib record is given.

Best Match Fields	Record Source	Title	Encoding Level	Author	Pub Date	Record Number	Format	Contr
<input checked="" type="checkbox"/> D.LC.S.DW	BTCAT	The Summer House / James Patterson and Brendan DuBois	Full	Patterson, James, 1947-	2020	7003219	BOOK..	b2
<input type="checkbox"/> D.LC.LT.S	JB	The summer house [large print] / James Patterson and Brendan DuB	Full	Patterson, James, 1947-	2020	7069645	BOOK..	b2
<input type="checkbox"/> D.LC.LT.S	Skyriver	The summer house [large print] / James Patterson and Brendan DuB	Full	Patterson, James, 1947-	2020	0	LARG..	sky
<input type="checkbox"/> D.LC.LT.S	Skyriver	The summer house [large print] / James Patterson and Brendan DuB	Full	Patterson, James, 1947-	2020	0	LARG..	sky

Below is an example of how the best records green icon will display when comparing records.

Record Number	Record Source	Title	Encoding Level	Author	Pub Date	Record Number	Format	Contr
6698291 (BOSTON)	D.S.LC	cam ali				6261201 (BOSTON)	D.S.LC	cam a i
001 on1134405483						001 7438952		
003 OCoLC						005 20200304072619.1		
005 20200331145055.1						008 200304s2019 nyu 000 1 eng		
008 200331s2019 nyu d 000 1 eng d						010 #a 2019009992		
035 #a7466457						020 #a9780525541905#q(hardcover)		
6272778 (BOSTON)	D.S.LC	cam a i				7068879 (BOSTON)	D.S.LC	cam a4a
001 7438952						001 2005009189		
005 20200831124919.9						003 DLC		

# The BTCAT Community Database

If your organization has opted to contribute to the BTCAT Community database, the system will look for the ISBN (020) or the UPC (024) field for a match. If a record matches the first occurrence of these fields and already exists, the system will compare them automatically and will look first at the encoding level in the Leader Byte 017 field. If your record has a higher encoding level than what the BTCAT Community database has, the system will use your record and will merge any fields if they are missing.

**Note:** If the encoding level in your record is equal to or lower than the one existing in the BTCAT Community database, the system will keep the existing BTCAT Community record and will then merge any fields deemed as important from your record.

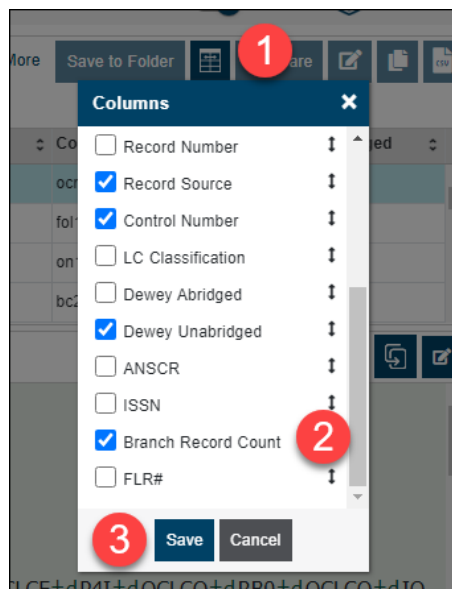
Below is an explanation of the fields the BTCAT Community database looks for when comparing records:

- **LCCN 010 \$a, ISBN 020 \$a, UPC 024 \$a, ISSN 022 \$a** – If these fields do not exist, the record will be created in the BTCAT Community database, as well as to your local database. If these fields do exist, the system will validate that the record being saved has a higher encoding level than the BTCAT Community record. The following tags will be merged if they are not already present in the BTCAT Community record:
  - **006**
  - **007**
  - Any **0XX** tags that are not local, including **041, 043, 050, 072, 082, and 084**
  - **300** if **\$c** is present in the new record, but not in the BTCAT Community record
  - **3XX** tags where **\$2** is present
  - **505**
  - **520**
  - **521**
  - **538**
  - **546**
  - **588**
  - **775**
  - **776**
  - Every occurrence of the **4XX, 6XX, 7XX, and 8XX** headings will be merged, even if the tag already exists.
- In the case of sets (for example Blu-Ray/DVD combos), these sets can be broken up across multiple bib records with the same ISBN/UPC.
  - For a volume set of books where each volume does not have a unique ISBN, only the set record can be saved to the BTCAT Community database.
  - For Blu-Ray/DVD combo packs, the system will compare the 007 field, as well as the UPC. If both the UPC and the 007 field(s) match, the records will be merged. If they don't match, the record will be added to the BTCAT Community database as its own record.
- All BTCAT Community database records will strip all local fields (**XX9, X9X, 9XX**), with the exception of the **490** field.
- Field **996 \$a1** will be added to the record.
- All BTCAT Community records will be validated using MARC21, with the exception of the Leader Byte 017 field.

- The **040** field will be updated with tags for the source agency: **\$a/\$c** for new records; **\$d** added for changes to an existing record).
- The following is a list of the minimal fields necessary in order to save a record successfully to the BTCAT Community database:
  - Leader **05** field should be **P, C, or N**
  - **007** field must be present when the leader **06** field is **G**
  - **008** field must be present
  - **040 \$a** must be present
  - At least one **02X** identifier (**020 \$a, 022 \$a, 024 \$a**) must be present
  - **245 \$a** (title) must be present
  - **300 \$a** (physical description) must be present
- **997 \$a** will be created with the new record number

## The Branch Record Count Column

If you want to see how many other organizations are using a certain record, add the Branch Record Count Column by clicking on **Search Columns (1)**, selecting **Branch Record Count (2)**, and then clicking **Save (3)** while on the Search Results page.



If a record is being used by other organizations, the number of organizations using that record will display in the **Branch Record Count** column as a hyperlink. In the below example, two other organizations are using the associated record.

Best	Match Fields	Branch Recor...	Folders	Title
<input checked="" type="checkbox"/>	D DW LC S...	0		Sofia the first. Ready to be a pri
<input checked="" type="checkbox"/>	D DW LC S...	<a href="#">2</a>		rie tale thea
<input checked="" type="checkbox"/>	D DW LC S...	0		She-Ra and the princesses of p
<input checked="" type="checkbox"/>	D DW LC S...	0		Learn to draw enchanted prince

Click on the numerical hyperlink to preview the copies of other organizations' records.

Branch Records			Back
Database Record Number	Record Source	Last Modified Date	
33693914	FSS	02/04/2021 11:15 AM	
5153816	OCDB	10/17/2020 10:38 AM	

Bibliographic Record		
000	ngm a a	
001	fol12462933	
005	20210204121512.8	
007	vd cvaizk	
008	090714p20091984nyu204 j	vleng d
020	‡a9781417232239	
024	1 ‡a741952668992	

## Navigation

### Keyboard Navigation

You can add and edit most information without using a mouse; however, to add control fields, you must click **Add New Field**. Below are the keyboard navigation shortcuts you can use to create or edit a record:

- **Control-D** – Insert delimiter
- **Alt-Delete** – Delete a tag
- **Enter** – Add a new row
- **Control-C** – Copy
- **Control-V** – Paste
- **Control-Z** – Undo
- **Control-X** – Cut
- **Tab** – Go to next subfield
- **Shift-Tab** – Go back one subfield
- **Left and Right Arrows** – Move within the current field
- **Up and Down Arrows** – Move up and down to another row
- **Alt + L** – Save to Local Workspace

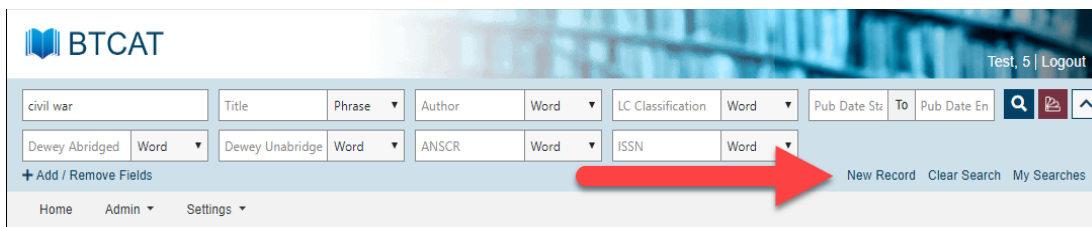
- **Alt + P** – Print record

For a single tag, you can place your cursor within the tag number to perform the below keyboard shortcuts. For multiple tags, you should start within your mouse pointer outside the first tag box, and then highlight across and down before using the following shortcuts:

- **Control + Shift + C** – Copy field
- **Control + Shift + V** – Paste field
- **Control + Shift + X** – Cut field

## Create a New MARC Record

To create a new record from scratch, click **New Record**.



Select the **MARC template** you want to use by double-clicking on the template name. A preview of the template will display below the selection area when you click once on a template name.

**Templates**  
Double click a template to create a new record.

Select Type 
 Local
  Global
  Institutional
 Institution 
 Search

Name	Description	Type	Level	Institution	Last Used
vidya-Clone of PerformanceTesting30	vidya-Clone of PerformanceTesting30vidya-Clone ...	Book	Global		12/30/2019 4:19 AM
Clone of Book template - Ann		Book	Local		
Verify Marc Tag		Serial	Global		

**MARC**

```
000  nam a
008  001031s      |||||eng |
020  #avidya-Clone of PerformanceTesting30
245  19 #avidya-Clone of PerformanceTesting30
```

The creation page will display with any pre-defined fields from your chosen template completed. Those fields are locked and cannot be edited.

## Reserved Tags

There are a few tags you cannot change within the MARC records; these are tags that Baker & Taylor uses and has reserved:

- **996 \$b** = Record Source
- **997** = BIB Record Number (this is the same as the old 910 tag)
- **998** = CARL Saved History

## Entering Information

BTCAT will guide you through many tags when creating or editing a record. For example, if you add tag 008, the system will present a drop-down with all possible choices (and their associated definitions) when entering information. You can select an option from the drop-down, or enter it manually. In the below example, the system displays all possible choices for the Type of date/Publication Data field.

The screenshot shows the 'Create Bibliographic Record' interface. At the top, there is a header with '008', '200103s', and '000 0 eng d'. Below this, there are several input fields. The field 'Date entered on file (00-05)' contains '200103'. The field 'Type of date/Publication status (06)' is highlighted with a red box, and a dropdown menu is open, showing a list of options: 'b - No dates given...', 'c - Continuing re...', 'd - Continuing re...', 'e - Detailed date', 'i - Inclusive date...', 'k - Range of year...', 'm - Multiple dates', 'n - Dates unknown', 'p - Date of distri...', and 'q - Questionable ...'. Other fields include 'Date 1 (07-10)', 'Date 2 (11-14)', 'Target audience (22)', 'Government publication (28)', 'Index (31)' (value: 0), 'Biography (34)', 'Cataloging source (39)' (value: d), 'Place of publication, production, or execution (15-17)', 'Form of item (23)', 'Conference publication (29)', 'Undefined (32)', 'Language (35-37)', and 'Date of contents (24-27)'.

In the second example, below, a list of all possible entries displays when you place your mouse cursor in the first field. You can select an option from the drop-down, or enter it manually.

The screenshot shows the 'Create Bibliographic Record' interface. At the top, there is a header with '040' and '040'. Below this, there are several input fields. The first field is highlighted with a red box, and a dropdown menu is open, showing a list of options: '651 - Subject Ad...', '653 - Index Term...', '654 - Subject Ad...', '655 - Index Term...', '656 - Index Term...', '657 - Index Term...', '658 - Index Term...', '662 - Subject Ad...', '690 - Local Subje...', and '691 - Local Subje...'. Other fields include 'class #b cutter', 'class #2 ed.', 'author', 'title / #c author.', 'place #b imprint #c date', 'pages cm', and 'text #2 rdacontent'.

As you work your way through creating your MARC record, the system will continue to assist you with entering additional information, such as delimiters. In the example below, each time you press **Control-D** to add a delimiter, the drop-down list will appear, guiding you through your choices.

Create Bibliographic Record			
050	1	4	#a class #b cutter
500			
082	0	4	
100	1		
245	0	0	
264		1	to place the imprint to date

## Add Notes to a MARC Record

You can add notes to a MARC record by clicking on the **Notes** tab on the right side of your screen.

The screenshot shows the 'Create Bibliographic Record' interface. On the right side, there is a vertical navigation bar with tabs for 'Validate Authority', 'Print', 'Notes', and 'Macros'. The 'Notes' tab is highlighted with a red arrow pointing to it.

The notes tab will expand. Click on the **plus icon** to add a new note. From here, you can enter your note and assign it to another BTCAT user. You can also assign a **Status** to the note: *Open*, *Closed*, *On Hold*, and *In Progress*.

The screenshot shows the 'Create Bibliographic Record' interface with the 'Notes' tab expanded on the right. The 'Notes' tab contains a text area with the text 'Test 4; 06/29/2020 07:56 AM' and 'Please review.' Below this, there are fields for 'Assignment' (set to 'Adaptive Cataloger') and 'Status' (set to 'Open'). A red arrow points to the 'Add New Field' button at the bottom left of the main record area.

To add notes to a specific field, click on the **text bubble icon** (1) next to the associated field, and then enter your note in the expanded **notes area** (2).

**Edit Bibliographic Record**  
Record Source: BTCAT  
Workspace

000	nam a i
001	bl2020008154
005	20200330131207.9
008	200330r20112010maub j 000 1 eng d
010	#abl2020008154
020	#a9781432875916
040	#aNjBwBT#beng#cNjBwBT#erda
050	1 4 #aPZ7.P22115#bLo 2011
082	0 4 #a[Fic]+223
082	1 4 #aFIC+214#5NjBwBT
100	1 #aPark, Linda Sue.
245	1 2 #aA long walk to water :#bbased on a true story : a novel /#cby Linda Sue Park.
260	#aBoston :#bSandpiper,#c[2011], c2010.
264	#bTHORNDIKE PRESS, A PART OF GALE, A CENGAGE COMPANY,#c2020.

Buttons: Add New Field, Save To, Cancel, Back

**Notes**

Test 4; 06/29/2020 07:50 AM  
Please review.

Assignment \* Adatptive Cataloger  
Status Open

245

Test 4; 06/29/2020 08:13 AM

Assignment \*  
Status Open

Buttons: Save, Cancel

## Macros

BTCAT comes with a selection of macros that can be executed for your records. Click on the **Macros** tab on the left side of your screen to open the **Macros Panel (1)**. Click on the **play icon (2)** next to the macro you wish to execute.

Home Admin User Settings Customer Settings

**Edit Bibliographic Record**  
Record Source: BTCAT

000	cam a7a
001	2012930138
003	DLC
005	20200210113143.9
008	120104s2012 nyua b 001 0 eng c
010	#a 2012930138
016	7 #a101581374#2DNLM
016	7 #a016055136#2Uk
020	#a9781617795503 (alk. paper)
020	#a161779550X (alk. paper)
020	#a9781617795510 (e-ISBN)

Buttons: Add New Field, Is Extract, Save To, Cancel, Back

**Macros**

Search Macros

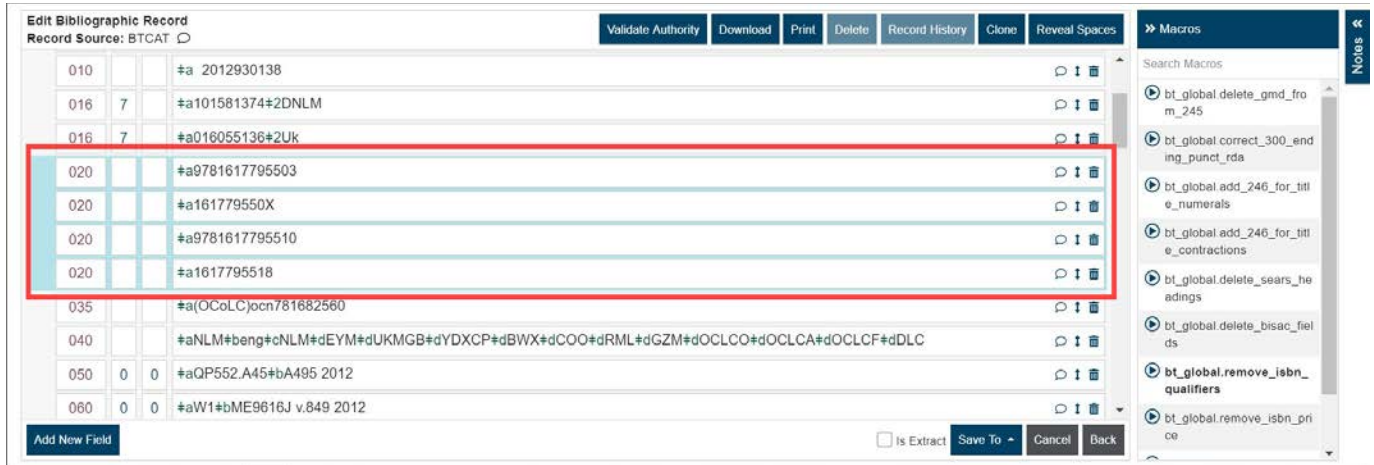
- bt\_global.delete\_gnd\_from\_245
- bt\_global.correct\_300\_ending\_punct\_rda
- bt\_global.add\_246\_for\_title\_numerals
- bt\_global.add\_246\_for\_title\_contractions
- bt\_global.delete\_sears\_headings
- bt\_global.delete\_bisac\_fields
- bt\_global.remove\_isbn\_qualifiers
- bt\_global.remove\_isbn\_price

Depending on the macro selected, an execution pop-up will display for you to enter your changes. Click **Execute** to run the macro.

**Execute Macro** ✕

<b>Variable</b>	<b>Value</b>
retain_price	<input type="text" value="Y"/>

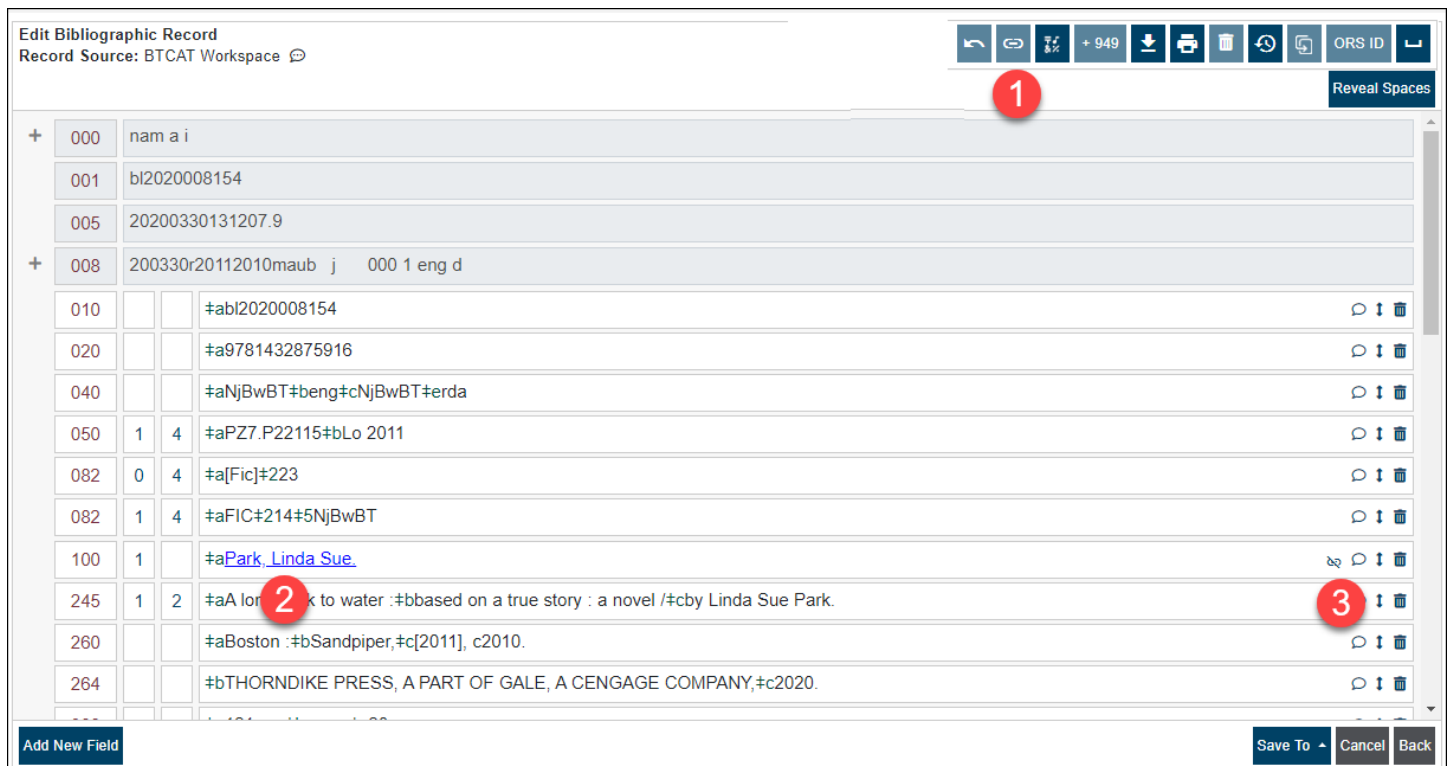
Once the macro has run, any changes made via the macro will display on the left side of the page in blue.



If you have administrative privileges, you can [create a macro](#) by going to **Admin > Macros**.

## Validate Authority

Click **Validate Authority (1)** to validate your information against your organization's authority file. If a match is found, the tag will be **hyperlinked (2)** and a **link icon (3)** will display on the right side of the screen for that tag.



Click directly on the hyperlink to view the associated authority record in a pop-up window. If a full heading cannot be validated, no hyperlinks will be created.

**Search Authority** [X]

Roberts, Adam      Name      🔍

Heading	Type of Heading	Source	Encoding Level	Bib Count
Roberts, Adam	Personal Name	LC	Complete	115
Roberts, Adam (Adam ...)	Personal Name	LC	Complete	251
Roberts, Adam (Adam ...)	Tracing – Personal Name	LC	Complete	5
Roberts, Adam (Econo...)	Personal Name	LC	Complete	1



**Authority Record**

```

000 00494nz a2200133n 4500
001 n 2004036943
003 DLC
005 20040211194746.0
008 040211n| acannaabn |n aaa
010 ‡an 2004036943
040 ‡aDLC‡beng‡cDLC
100 1 ‡aRoberts, Adam
  
```

Link      Close

If you want to use a different heading, use the search box to search for a heading and insert it into the bib record by clicking **Link**.

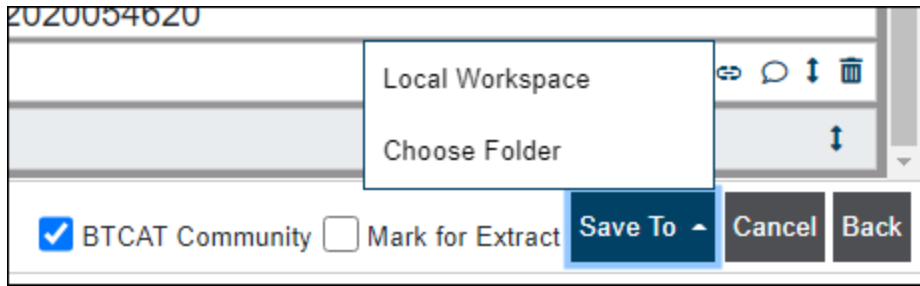
If you decide you don't want to link this record to the authority record, click on the **unlink icon**  on the record itself to remove the hyperlink. The icon will be replaced by a **link icon** . Just click on this icon to relink the record to your authority record.

100	1	‡aPark, Linda Sue.				
-----	---	--------------------	---	---	---	---

## Saving Your New MARC Record

Once you've made your changes, click on the **Save To** button. If presented with the option, save to the workspace of your choice. You can also save your record to a folder by selecting **Choose Folder**. The system will perform a validation check upon saving. If any errors are found, the system will advise you which fields need to be corrected before you can successfully save.



**Note:** If you would like to flag the record for extract (i.e., the record is ready to be exported and loaded into your system), select **Mark for Extract** before saving. If your organization has set up the option to contribute records to the **BTCAT Community**, you will see an option to save the record to that space as well. This option will be turned on by default, but you can uncheck it for individual bibliographic records you do not wish to share.



## Compare Two or More MARC Records

You can select up to eight MARC records to compare. Place a checkmark **(1)** next to the MARC records you wish to compare, and then click **Compare (2)**.

	Title	Author	Pub Date	Record Number	Source
<input type="checkbox"/>	Lincoln, in his own words / edited by Milton Meltzer ; illustrated by St...		2018	4697123	BTCAT Works
<input checked="" type="checkbox"/>	A long walk to water : based on a true story : a novel / by Linda Sue ...	Park, Linda Sue.	2011	6686213	BTCAT Works
<input checked="" type="checkbox"/>	A long walk to water : based on a true story : a novel / by Linda Sue ...	Park, Linda Sue.	2011	6689886	BTCAT Works

Although you can compare up to eight records, comparisons between records will only display when you are viewing two records. Any differences in the records will display in blue. To edit one of the records, click the **edit icon** . To close one of the records, click the **X icon** . To scroll both records up and down at the same time, click **Synchronize Scrolling**. This option is selected by default. If you turn Synchronize Scrolling on and then off, the system will display all records at the top again.

Record Number: 7422428(B&T)	Record Number: 7422427(B&T)
000 nam a8i	000 nam a8i
001 2020033645	001 2020033644
003 DLC	003 DLC
005 20200805124223.9	005 20200805124223.9
008 200724s2022 nyu jo 001 0ceng	008 200724s2022 nyu j 001 0ceng
006 m  o d	010 #a 2020033644
007 cr_	020 #a9781538264874#q(library binding)
010 #a 2020033645	020 #a9781538264850#q(paperback)
020 #a9781538264881#q(ebook)	020 #a9781538264867#q(set)
020 #z9781538264874#q(library binding)	020 #z9781538264881#q(ebook)
020 #z9781538264850#q(paperback)	040 #aDLC#beng#erda#cDLC
020 #z9781538264867#q(set)	042 #apcc
040 #aDLC#beng#cDLC#erda	043 #an-us---
042 #apcc	050 00 #aE457.2#b.S468 2022
043 #an-us---	082 00 #a973.7092/2326/.8092+223
050 00 #aE457.2	100 1 #aShea, Therese, #e author.
082 00 #a973.7092/2326/.8092+223	245 10 #aAbraham Lincoln and Frederick Douglass /#cTherese M. Shea.
100 1 #aShea, Therese, #e author.	263 #a2108
245 10 #aAbraham Lincoln and Frederick Douglass /#cTherese M. Shea.	264 1 #aNew York :#bGareth Stevens Publishing, #c[2022]

When you click the edit icon, the selected record will open on a new page in the MARC editor.

The screenshot shows the 'Edit Bibliographic Record' interface. At the top, it says 'Record Source: BTCAT Workspace'. A toolbar contains icons for undo, redo, zoom, and other functions. A 'Reveal Spaces' button is on the right. The main area is a table of fields:

Field Number	Subfield	Value	Actions
000		nam a i	
001		bl2020008154	
005		20200330131207.9	
008		200330r20112010maub j 000 1 eng d	
010		#abl2020008154	ⓘ ⬇ ⬆
020		#a9781432875916	ⓘ ⬇ ⬆
040		#aNjBwBT#beng#cNjBwBT#erda	ⓘ ⬇ ⬆
050	1 4	#aPZ7.P22115#bLo 2011	ⓘ ⬇ ⬆
082	0 4	#a[Fic]#223	ⓘ ⬇ ⬆
082	1 4	#aFIC#214#5NjBwBT	ⓘ ⬇ ⬆
100	1	#aPark, Linda Sue.	ⓘ ⬇ ⬆
245	1 2	#aA long walk to water :#bbased on a true story : a novel /#cby Linda Sue Park.	ⓘ ⬇ ⬆
260		#aBoston :#bSandpiper,#c[2011], c2010.	ⓘ ⬇ ⬆
264		#bTHORNDIKE PRESS, A PART OF GALE, A CENGAGE COMPANY,#c2020.	ⓘ ⬇ ⬆

At the bottom left is an 'Add New Field' button. At the bottom right are 'Save To', 'Cancel', and 'Back' buttons.

From here, you can click **Add New Field** to add additional fields to your record. A new row will display, with BTCAT guiding you through field creation. In the example below, the system displays a list of possible options you can select for the initial field. The system will guide you throughout the creation of your new row. To learn more about how to add fields, go to the [Create a New MARC Record](#) section of this guide.

This screenshot shows the 'Add New Field' process. A dropdown menu is open, listing various field options. A red arrow points to the 'Science fiction. #2 lcaft' option.

Field Number	Subfield	Value
650		0 #a Hispanic American women #v Fiction.
650		0 #a Extraterrestrial beings #v Fiction.
650		7 #a Chocolate candy. #2 fast #0 (OCoLC)fst0085828
650		7 #a Extraterrestrial beings. #2 fast #0 (OCoLC)fst01

Dropdown menu options:

- 256 - Computer ...
- 257 - Country of ...
- 258 - Philatelic Is...
- 260 - Publication...
- 263 - Projected P...
- 264 - Production,...
- 270 - Address
- 300 - Physical De...
- 306 - Playing Time
- 307 - Hours, Etc.

Selected options in dropdown:

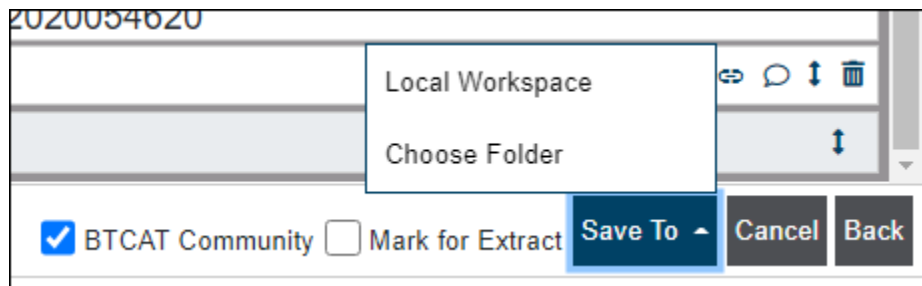
- Hispanic American women. #2 fast #0 (OCoLC)f
- Science fiction. #2 fast #0 (OCoLC)fst01108566
- Fiction. #2 fast #0 (OCoLC)fst01423787
- Science fiction. #2 gsafd
- Sci... fiction. #2 lcaft
- 8213
- 2018289758

'Add New Field' button is at the bottom left.

## Save Your Changes

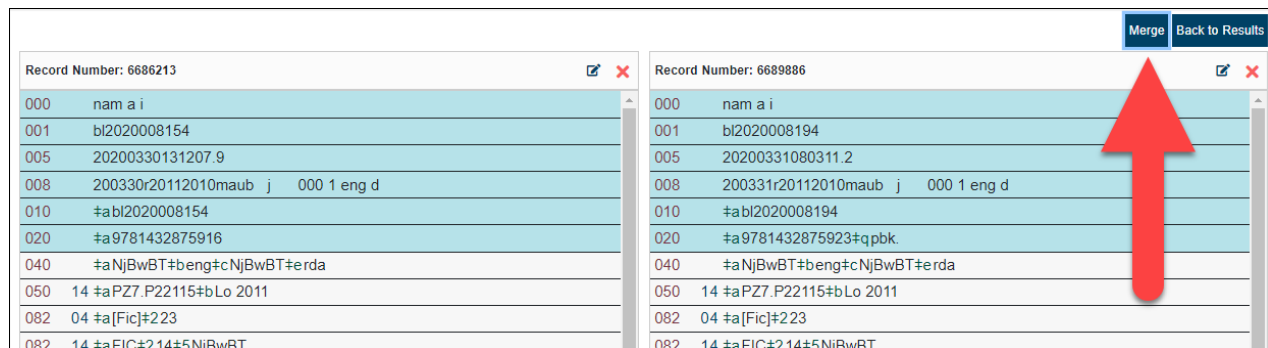
Once you've made your changes, click on the **Save To** button. If presented with the option, save to the workspace of your choice. You can even save to folder by clicking on **Choose Folder**. The system will perform a validation check upon saving. If any errors are found, the system will advise you which fields need to be corrected before you can successfully save.

**Note:** If you would like to flag the record for extract (i.e., the record is ready to be exported and loaded into your system), select **Mark for Extract** before saving. If your organization has set up the option to contribute records to the **BTCAT Community**, you will see an option to save the record to that space as well. This option will be turned on by default, but you can uncheck it for individual bibliographic records you do not wish to share.

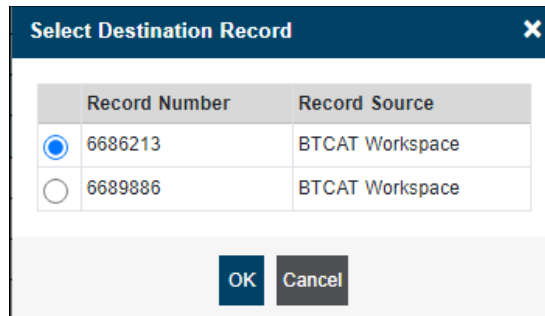


## Merge Records

To merge records, first select the records you want to merge and click **Merge**. Merging is limited to two records at a time, one of which must already be in your local workspace.



Select the destination record you wish to use once the records have been merged, and then click **OK**.



The screen will display with the original records on the right and left sides of the screen, and the merged record in the middle. Any lines that have differences between the two records will display in blue and green. Lines that are the same between the records will display in white. Those fields will be moved to the middle record automatically since they are the same.

Use the arrows from the record on the left side of your screen and from the record on the right side of your screen to add the associated fields to the merged record. In the example below, the **010 field (1)** has been moved to the final record from the left side of the screen (maintaining its blue color), while the **020 field (2)** has been moved to the final record from the right side of the screen (maintaining its green color). The color coding should help you easily see which fields you have pulled into your final record.

To move all fields from one record to the final record, click on the **double arrow icon** next to the record number **(3)**. If you want to add a new row to the final record, click the **plus sign (4)** next to the final record number. To remove all changes and begin again, click **Start Over (5)**. Click **Complete Merge (5)** to finalize the merged record. To discard all changes, click **Back (5)** to return to the search results screen.

Record Number: 6686213 (BTCAT Workspace) **3** >>

Final Record Number: 6686213 (BTCAT Workspace) **4** +

<< Record Number: 6689886 (BTCAT Workspace)

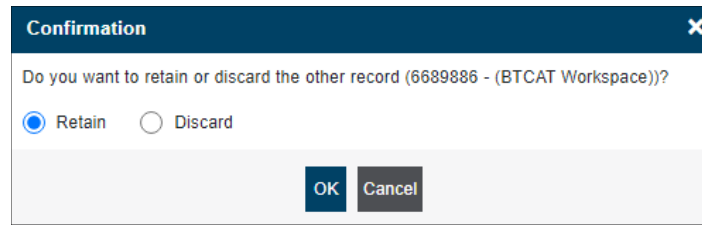
Record Number	Record Source	Record Content
000	BTCAT Workspace	nam a i
001	BTCAT Workspace	bl2020008154
005	BTCAT Workspace	20200330131207.9
008	BTCAT Workspace	200330r20112010maub j 000 1 eng d
010	BTCAT Workspace	#abl2020008154
020	BTCAT Workspace	#a9781432875916
040	BTCAT Workspace	#aNjBwBT#beng#cNjBwBT#erda
050	BTCAT Workspace	14 #aPZ7.P22115#bLo 2011
082	BTCAT Workspace	04 #a[Fic]#223
082	BTCAT Workspace	14 #aFIC+214#5NjBwBT
100	BTCAT Workspace	1 #aPark, Linda Sue.

Record Number	Record Source	Record Content
+ 000	BTCAT Workspace	nam a i
001	BTCAT Workspace	bl2020008154
005	BTCAT Workspace	20200330131207.9
+ 008	BTCAT Workspace	200330r20112010maub j 000 1
1 010	BTCAT Workspace	#abl2020008154
1 020	BTCAT Workspace	#a9781432875923 #qpbk.
040	BTCAT Workspace	#aNjBwBT#beng#cNjBwBT#erda
050	BTCAT Workspace	1 4 #aPZ7.P22115#bLo 2011
082	BTCAT Workspace	0 4 #a[Fic]#223
082	BTCAT Workspace	1 4 #aFIC+214#5NjBwBT

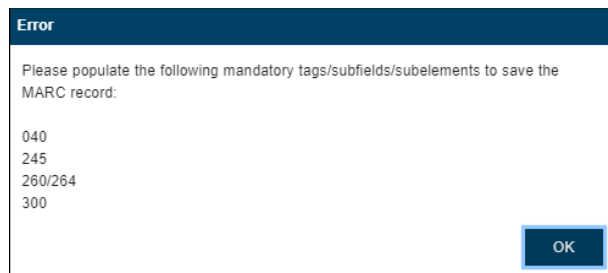
Record Number	Record Source	Record Content
< 000	BTCAT Workspace	nam a i
001	BTCAT Workspace	bl2020008194
005	BTCAT Workspace	20200331080311.2
< 008	BTCAT Workspace	200331r20112010maub j 000 1 eng d
< 010	BTCAT Workspace	#abl2020008194
< 020	BTCAT Workspace	#a9781432875923+qpbk.
< 040	BTCAT Workspace	#aNjBwBT#beng#cNjBwBT#erda
< 050	BTCAT Workspace	14 #aPZ7.P22115#bLo 2011
< 082	BTCAT Workspace	04 #a[Fic]#223
< 082	BTCAT Workspace	14 #aFIC+214#5NjBwBT
< 100	BTCAT Workspace	1 #aPark, Linda Sue.

Complete Merge Start Over Back **5**

Once you click **Complete Merge**, you'll be asked if you want to retain the record that you did not choose for your destination record. Click **Retain** to keep the record, or **Discard** to delete it, then click **OK** to continue.

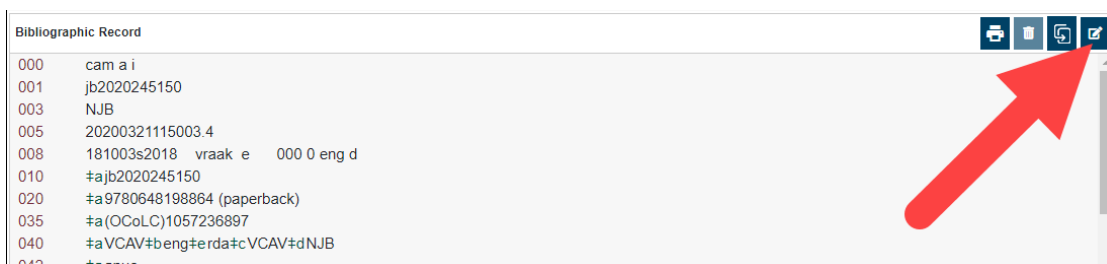


Your newly merged record will be validated by the system. If you have any errors, they will display in a pop-up window like the one below. You'll need to fix the errors before the merged record can be successfully saved.



## Edit an Existing Record

To edit an existing record, click on the **Edit** button associated with the record you wish to edit once you have found the record via search. For more information on how to add fields and delimiters to your edited record, go to [Create a New MARC Record](#) within this guide.

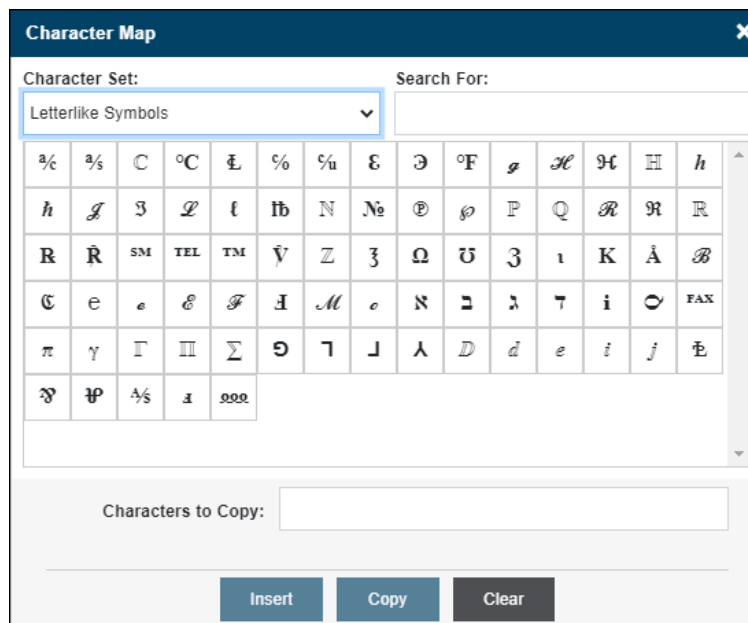


The Edit Bibliographic Record page displays. You can perform the following actions on this page:

- **(1)** – Use the plus and minus signs next to expandable fields to expand the field to reveal more information.
- **(2)** – Add, edit, and remove information as needed in the expanded fields. Some fields will auto-display options for you to select.
- **(3)** – Edit any additional fields as needed.
- **(4)** – To add a new field to the record, click **Add New Field**.
- **(5)** – Use the **navigational arrows** to move forward and backward throughout your search results. The **double-arrow icons** will take you to the first and last records, respectively, while the **single arrow icons**

will take you to the next or previous record, respectively. These arrows display if you open a record directly from the search results page.

- **(6)** – Use the **arrows** to move a field up and/or down in the record. If you want to delete a field, click on the **trash can icon**, or press the **Alt+Del** keys. Click on the **text bubble** to add a note to the field.
- **(7)** – Save your changes by clicking on **Save To** and selecting the workspace you wish to save your changes to in the system. If you would like to flag the record for extract (i.e., the record is ready to be exported and loaded into your system), select **Extract** before saving.
- **(8)** – Various action icons display here. In order, from left to right:
  - **Undo** – Undo up to your five last changes.
  - **Validate Authority** – Check your linked authority records.
  - **Character Map** – Display a pop-up window that allows you to search for and copy diacritical marks within your records.



- **Add 949** – For internal BTCAT users only.
- **Download** – Append this record to a .MRC file.
- **Print** – Print this record.
- **Delete** – Delete this record.
- **Record History** – View a history of changes for this record.
- **Clone** – Clone this record.
- **ORS ID** – For internal BTCAT users only.
- **Reveal Spaces** – Displays an icon to represent for all spaces in the record.

Edit Bibliographic Record  
 Record Source: ALEXMAIN

008 120705s3013 nyu b 001 0 eng

Date entered on file (00-05)	120705	Type of date/Publication status (06)	s	Date 1 (07-10)	3013
Date 2 (11-14)		Place of publication, production, or execution (15-17)	nyu	Illustrations (18-21)	
Target audience (22)		Form of item (23)		Nature of contents (24-27)	b
Government publication (28)		Conference publication (29)	0	Festschrift (30)	0
Index (31)	1	Undefined (32)		Literary form (33)	0
Biography (34)		Language (35-37)	eng	Modified record (38)	
Cataloging source (39)					

010		#a 2012027232	
020		#a9780415659833 (hbk.)	
040		#aDLC+cDLC+dDLC	
042		#apcc	
043		#ae-----	

Add New Field    << < > >>    BTCAT Community    Save To    Cancel    Back

As you move your mouse up and down the screen, a dark blue bounding box will display over the tag your mouse is currently on top of, to help you see exactly where you are in the record. The bounding box will display when you are entering information in a tag as well.

If you click out of one field and into another, when you return to the first field, your mouse cursor will be where you last left it.

## Opening Multiple Tabs in the Editor

When you open more than one record from the search results page, each record will display in an individual tab at the top of the page. The tab you are currently viewing will display in white, while tabs you are not viewing will display in gray. Tabs that have unsaved changes will display with an orange border. Click the **x icon** to close one tab, or click **Close All** to close all tabs. If you try to close a tab without saving your changes, you'll be asked if you are sure you want to close without saving.

7422428 - B&T x 7422427 - B&T x 7637345 - B&T x Close All x

Edit Bibliographic Record  
Record Source: B&T

+ 000 nam a8i  
001 2020033645  
003 DLC  
005 20200805124223.9  
+ 008 200724s2022 nyu jo 001 0ceng  
+ 006 m |o d |  
+ 007 cr\_|||||||

010 #a 2020033645  
020 #a9781538264881#q(ebook)  
020 #z9781538264874#q(library binding)  
020 #z9781538264850#q(paperback)  
020 #z9781538264867#q(set)  
040 #aDLC#beng#cDLC#erda  
042 #apcc  
043 #an-us---  
050 0 0 #aE457.2  
082 0 0 #a973.7092/2326/.8092#223

Add New Field BTCAT Community Save To - Cancel Back

## View Record History

Any time changes are made to a record, the system automatically saves a version of the record for historical purposes. To view the edit history of a record within your local workspace, click on **Record History**. A list of previous versions of the record will display, along with the user who edited the record, and the date the record was changed. To view the version of the record from a certain user or date, just click on the row you wish to view. You can compare the historical versions by placing a checkmark next to the rows you wish to compare, and then clicking on **Compare**. Learn more about comparing records in the [Compare Two or More MARC Records](#) section of this guide.

**Note:** You can only edit the most recent version of a record when viewing a record's history. This also applies to merging MARC records: only the most recent versions can be merged.

Record Number: 8342 < Previous Next > Compare Back

<input type="checkbox"/>	Title	Edited By	Edited Date	Record Source
<input type="checkbox"/>	20 ways to make every day better :simple, practical changes with real results /Joyce Meyer.	null	01/02/2020 10:23 AM	BTCAT Main
<input type="checkbox"/>	20 ways to make every day better :simple, practical changes with real results /Joyce Meyer.	admin1	12/26/2019 8:07 AM	BTCAT Workspace

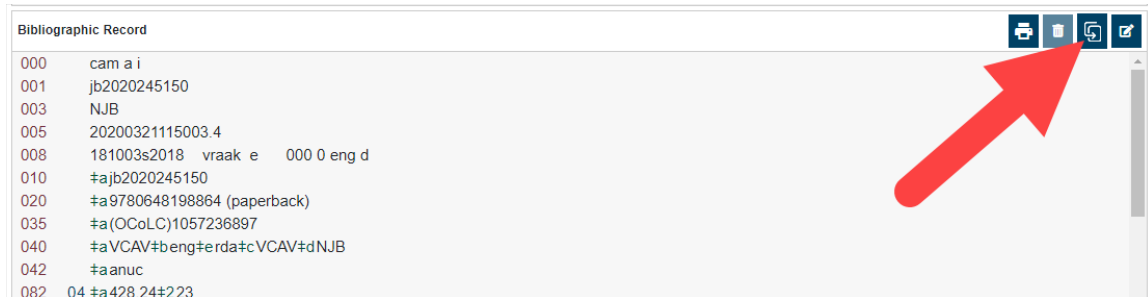
Bibliographic Record

```
037 #a9781478985143 #bBlackstone Audiobooks #nhttp://www.blackstoneaudio.com
049 #aMAIN
072 7 #aREL #x012070 #2bisacsh
072 7 #aREL #x012120 #2bisacsh
072 7 #aREL #x012040 #2bisacsh
082 04 #a248.4 #223
092 #aCD 248.4 #bMEYER
```

# Clone a Record or Template

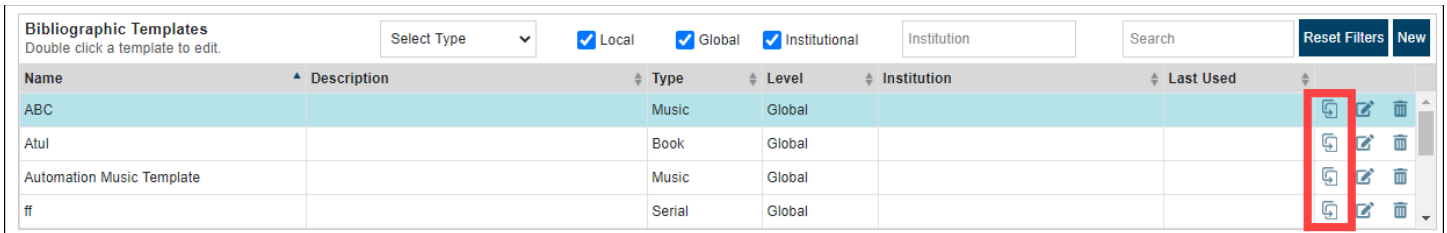
When you clone a record or template, all control fields will be removed with the rest of the record intact and ready for you to begin building a new record based on the original. The first screenshot shows you where to clone and individual record; the second displays where to clone a template. You may or may not be able to clone a record, depending on the permissions you've been assigned by your administrator.

Click the **Clone** icon.



A copy of the record you just selected will display. System generated and control fields (001, 003, 005, 010) will be stripped from the record. From here, you can edit the record as needed. It will be saved with a new record number.

To clone a template, go to **Admin > Bibliographic Templates** and click the **clone icon** next to the template you wish to edit.



# Alerts

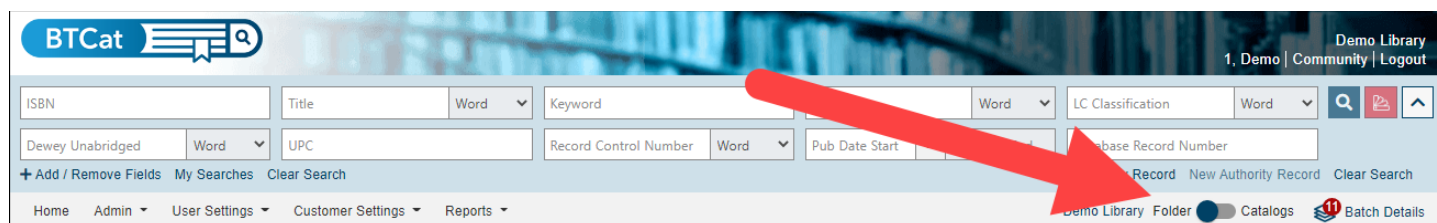
Any records that have been flagged for review will display on the home page under the **Alerts** tab. Hover over the tab to display a list of any alerts. Click on the linked **Record Number** to view the alert.

Record Number	ATS Number	Title	Date	Requester	Customer	Status
<a href="#">6975135</a>		Faith under fire :	06/02/2020 05:59 AM	Test, 3		Open

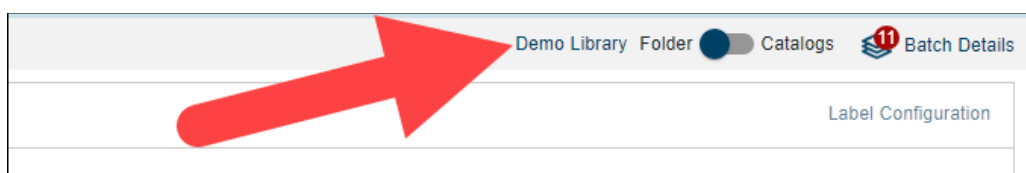
## Folders

If you want to organize your records in a specific way, you may want to use BTCAT's folder function. With folders, you can essentially tag records in a group, displaying them at any time by turning on the **Folders** switch, located just below the search fields in the system. All records are still saved to the system; assigning a record to a folder just places it in a specific place for organizational purposes.

To go back to the catalog area, just toggle the **Folder** switch back to **Catalogs**, or click on the **Home** page link.

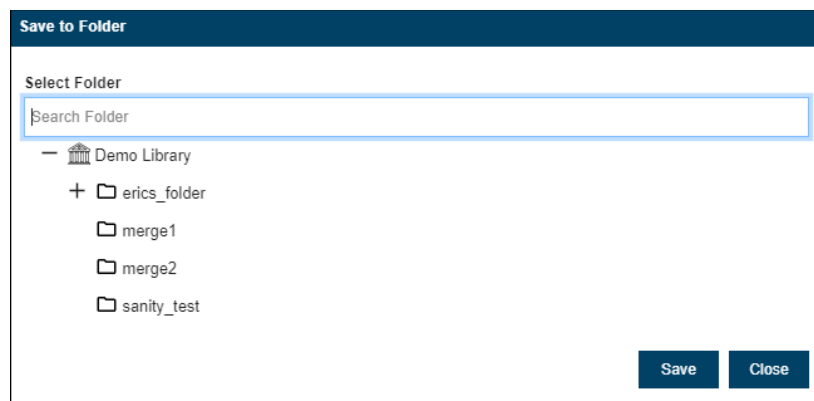


When you switch on folders, a hyperlink with the name of last folder you were in will display. No matter where you are in the system (with the exception of the Home page), just click your institution name to go back to the main folders page.

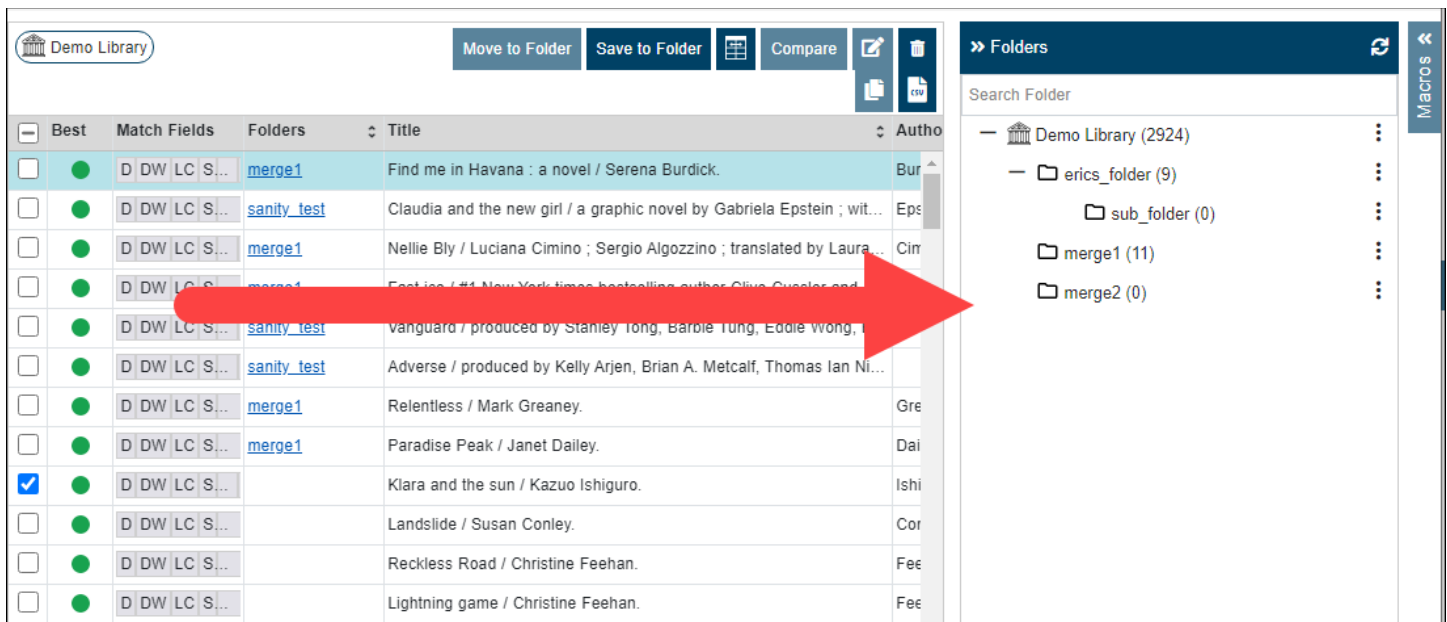


There are several options specific to the Folders page.

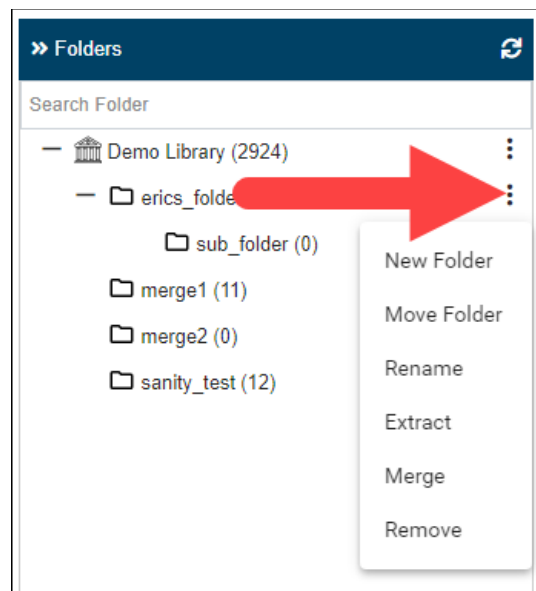
- (1) – If a record has been saved to a folder, a direct link to the folder will display under the **Folders** column. Click this link to go to that folder.
- (2) – If you want to move records to a folder, select them on this page and then click **Move to Folder**. You can move up to eight rows at a time.
- (3) – If you want to save records to a folder, select them on this page and then click **Save to Folder**. A list of existing folders will display. Just select the folder you want to save the record to, and then click **Save**. You can save up to eight rows at a time.



- (4) – Open the **Folders** panel to view a list of all existing folders. Click on a **folder name** to display the contents of the selected folder on the left side of the screen. If you have a large list of folders, begin typing in the **Search Folder** field to view a list of folders that match what you’ve entered.



Click on the hamburger menu icon next to a folder to reveal the following options:



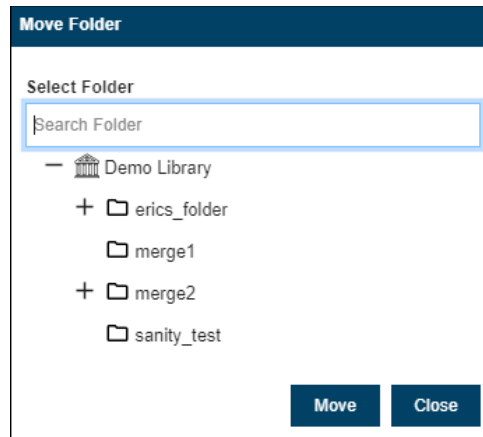
- **New Folder** – Create a new folder. Enter the name of the new folder and then click **Create**. To create a subfolder, click **New Folder** next to an existing folder. Creating a new folder is the only option you will see next to your institution’s name. Folder names can only contain alphanumeric characters (with the exception of an underscore); spaces are not allowed. You can create up to three levels of subfolders.

**Create Folder**

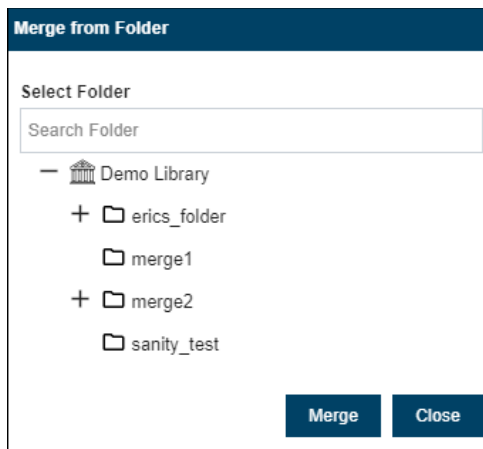
Name

Create
Close

- **Move Folder** – Moves the selected folder to a new area. Select the folder you wish to move the associated folder to. To make a subfolder into a parent folder, select your library name. Click **Move** to move the folder.



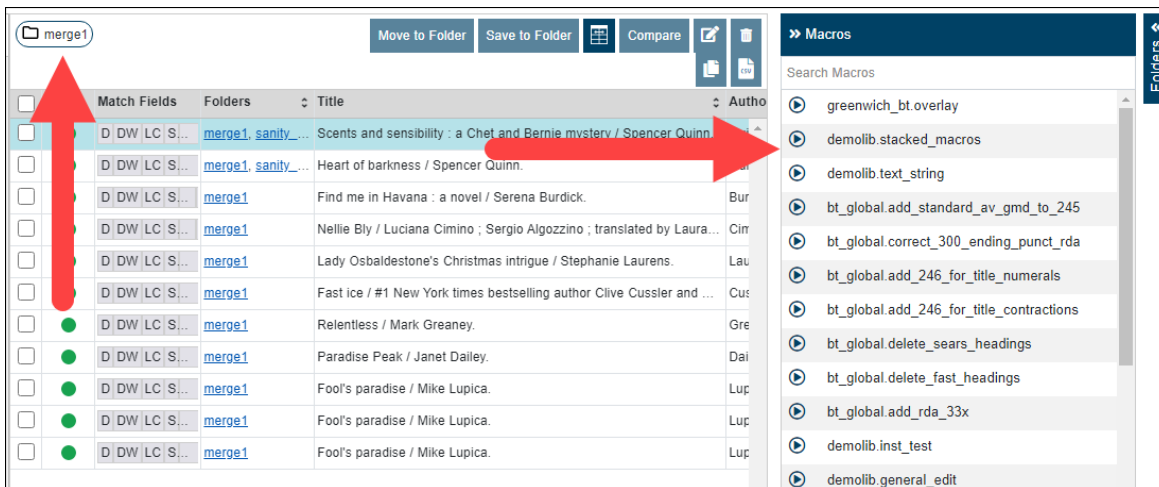
- **Rename** – Rename the associated folder.
- **Extract** - Extract the contents of the associated folder. You will receive a notification that the extracted file will be sent to the email address we have on file, or placed on the FTP site based on your preferences.
- **Merge** – Merge the contents of one or more folders. Once you select merge, you'll be asked to select the folder you want to merge with the associated folder. Click on that folder's name and then click **Merge**. Merging can take some time, depending on the number of records; click the **Refresh icon** at the top of the Folders panel to refresh and see if the folders have been merged.



- **Remove** – Delete the folder. Please note that when you delete a folder, you are simply deleting the tag you've created for the folder; the records inside the folder ARE NOT deleted.

(5) Use the **Refine Your Search** area to narrow down your results, just like you do when you are looking at records that are not in folders.

Going back to the main folders page, if you don't have anything selected and you run a macro using the Macros panel, the system will assume you want to run the macro on ALL the records you've found. You'll need to select individual records on this page to run macros on specific records. If you want to run a macro on all records in one folder, just click on the hyperlinked folder name to view all records for that specific folder, and then run your macros as needed. In the below example, any macro selected will be run for every record within the **Merge1** folder unless individual records are selected first. Once the macro has been run successfully or has an error, you will receive an email message notifying you of the status.



Go to the [Batch Search](#) area to read about how to select specific records from a folder.

## Customer Configuration – Batch Search Folder Settings

Go to **Customer Settings > Customer Configuration**, and then open the **Batch Search Folder Settings** tab to review how you want the system to perform batch searching within your folders.

**Batch Search Folder Settings**

<p><b>Automatic Merge</b></p> <input type="checkbox"/>	<p><b>Renumber Tag</b></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="border: 1px solid #ccc; padding: 5px; width: 50%;">996</td> <td style="border: 1px solid #ccc; padding: 5px; width: 50%;">999</td> <td style="text-align: center; width: 20px;">🗑️</td> </tr> <tr> <td style="border: 1px solid #ccc; padding: 5px;">From Tag</td> <td style="border: 1px solid #ccc; padding: 5px;">To Tag</td> <td style="text-align: center;">+</td> </tr> </table>	996	999	🗑️	From Tag	To Tag	+	<p><b>Retain Tags</b></p> <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>
996	999	🗑️						
From Tag	To Tag	+						

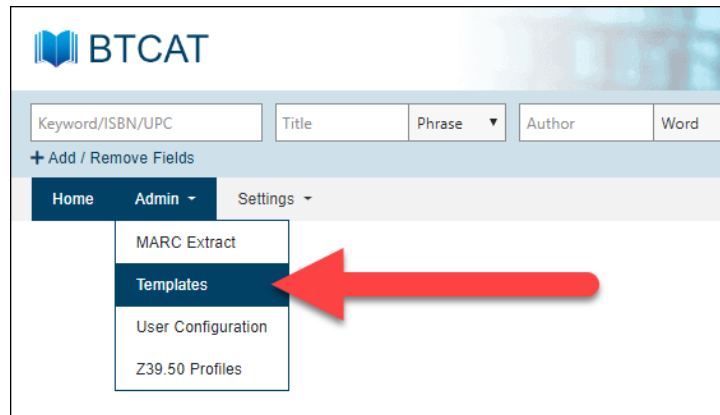
If you have extracted records in your folder, and you want to have the system automatically merge any records that have upgrades during your selected Upgrade Period, select **Automatic Merge**. Please note that this setting works in conjunction with the **Upgrade Service Export** option within **Customer Configuration > Export Settings**. If you don't select this option, you will need to manually save the record to your folder.

Enter any tags you wish to have automatically renumber during batch searching in the **Renumber Tag** fields, and enter any tags normally deleted that you want to retain in the **Retain Tags** field.

# Admin

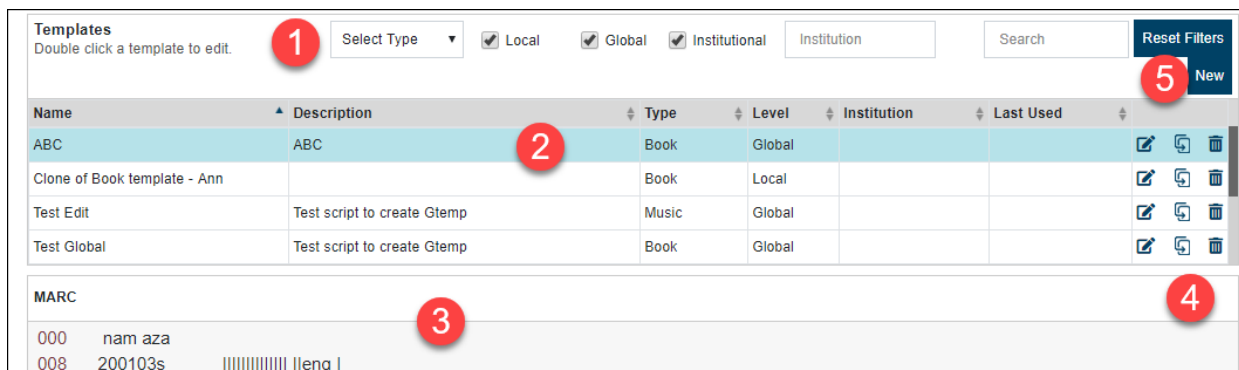
## Create, Edit, or Delete a MARC Template

BTCAT Administrators can create, edit, and delete MARC templates for others in their organization. To view and create a template, hover over **Admin**, and then select **Templates**.



A list of all templates available for your organization display.

- (1) – Filter for a specific template by selecting various filters at the top of the page, and then pressing **Enter**. Clear your filters by clicking **Reset Filters**.
- (2) – A list of all templates matching the above filters displays here.
- (3) – The currently highlighted template displays in preview mode at the bottom of the screen.
- (4) – Easily edit, clone, or delete a template using the associated icons.
- (5) – Click **New** to create a new template from scratch.



## Create a New Template

Once you've clicked **New** from the main templates page, the creation page displays.

- (1) – Enter information in the following fields:
  - **Name** – Give your template a unique name. This field is required.

- **Type** – Select the type of product this template will be associated with. Options are **Book**, **Serial**, **Music**, **Map**, **Visual Material**, **Computer File**, or **Mixed Material**. This field is required.
- **Level** – Select the level of use for this template. Options are **Global**, **Institutional**, or **Local**. Depending on how your profile has been set up, you may not see all of these options. This field is required.
- **Institution** – The name of your institution.
- **Description** – Enter a description in this field to provide any additional information you may want to display to users selecting this template in the future.
- **(2)** – System fields will be automatically added to the template.
- **(3)** – Click **Add New Field** to add a new row to your record. Complete the row using the guided drop-down fields provided by BTCAT. You can move fields up and down using the **arrows** to the right of the field, or delete the row by clicking on the **trash can icon**.
- **(4)** – **Save** your changes, **Cancel** them, or go **Back** to the previous page.

The screenshot shows the 'New Template' form. At the top, there are fields for 'Name' (Book Template), 'Type' (Book), 'Level' (Institutional), and 'Institution' (B&T Main). A large 'Description' field is on the right. Below these is a table of system fields with columns for a plus sign, a number, and a field name. The first row is '000 nam a' and the second is '008 200103s ||||||||| ||eng |'. A dropdown menu is open for the second row, showing options: 'a - Classification number', 'b - Item number', 'c - Copy information', and '8 - Field link and seque...'. At the bottom left is an 'Add New Field' button, and at the bottom right are 'Save', 'Cancel', and 'Back' buttons. Red circles with numbers 1 through 4 point to the Description field, the system field dropdown, the 'Add New Field' button, and the 'Save' button respectively.

## Extract

You can extract the following record types for customers via **Admin > Extract**. From here, you can review the work that has been flagged for extract within a date range (Extract Review), or you can extract your work to either your local directory or an FTP site, depending on the user preferences and institutional configuration set up by B&T Admin.

First, select either **Extract** or **Extract Review** from the **Select Extract Type (1)** field. If you select Extract, your records will be extracted without review; select the review option to view your records before extracting them. Next, select a **Start Date** and an **End Date** from the associated date pickers **(2)**, and then click on **Extract (3)**. The time frame you select will be the date/time the last save was made to a record.

Home Admin User Settings Customer Settings

### Extract

Select Extract Type \*  
 Extract Review 1

Institution  
 Demo Library

Start Date (EST) \*  
 7/1/2020

End Date (EST) \*  
 7/1/2020 2

3

Extract Cancel Back

If you've chosen to review your extract, items selected for extract will display on a review page.

Extract Review Configure Columns

S/N	ISBN	Title	Author	Dewey number
1	9781617795503	Amyloid proteins :		571.6/4078

Back

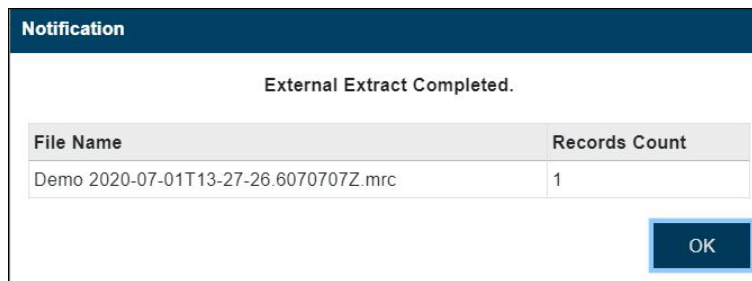
Click **Configure Columns** to add and remove columns from your view.

**Configure Columns** ✕

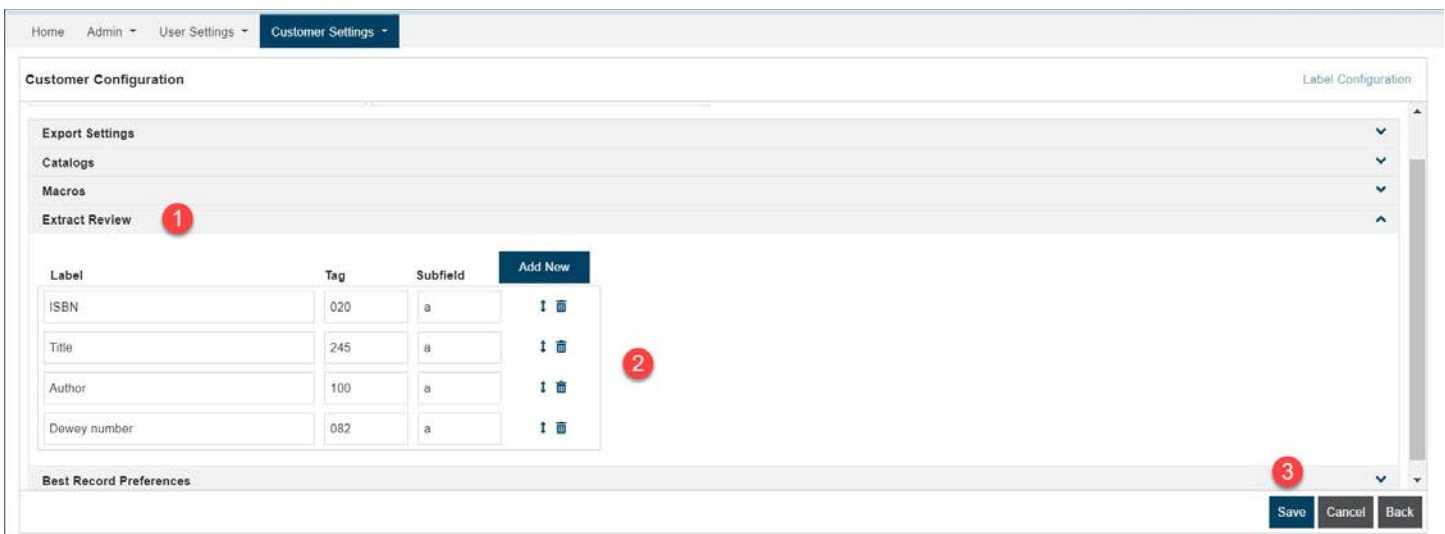
Tag	Subfield	Label	+
020	a	ISBN	↓ ↗ 🗑️
245	a	Title	↓ ↗ 🗑️
100	a	Author	↓ ↗ 🗑️
082	a	Dewey number	↓ ↗ 🗑️

OK
Cancel

Once the extraction process has been completed, you'll receive an email notification, as well as a notification on the screen, as in the below example.



If you'd like to add additional labels to review before extracting, go to **Customer Settings > Customer Configuration**, and open the Extract Review tab (1). Add and remove labels within the tab (2), and then click **Save** (3).



To view your extraction export settings, open the **Export Settings** tab (1), also found on the Customer Configuration page. From here, you can specify the number of records you'd like to see upon output (2), the file format for the extraction (3), and list any tags you wish to be renumbered upon extraction (4).

## Batch Search

Go to **Admin > Batch Search** to search for multiple items at once. You can upload a list of **ISBNs, UPCs, LCCNs, Control Numbers, DB Record Numbers, and Folders** by selecting the associated option from the **Select** field (1). Select the file you wish to upload via the **Upload File** area (2), or copy and paste (or enter directly) a list of numbers in the **Numbers** field (3). Once your batch search has completed, a link to the associated text file will display at the bottom of the screen (4). Searches are executed against the catalogs selected at the time of batch initialization. If the system finds an upgraded record, select **Mark Upgraded Records for Extract** (5) to have the system automatically flag those records for extract.

**Note:** Each line in the list is validated by length; e.g., ISBNs cannot exceed 13 characters, UPC cannot exceed 14 characters, etc. Any characters above those limits will wrap to the next line.

**Batch Search**

Select: Folder 1

Upload File: Choose a File 2 Browse

Numbers(9) \* 3

9781410483751  
9781250297723  
9781799958697  
1419750178  
9781925559439

Select Numbers

**List of Batches**

File Name	Customer	No. of records	Type	Batch Date	Delete
demo3 isbn search.txt	Demo Library	13	ISBN	03/08/2021 4:10 PM	
folder_03-07-21_102411.txt	Demo Library	11	Folder	03/07/2021 9:24 AM	
ext2test.txt	Demo Library	183	ISBN	12/17/2020 1:44 PM	
isbn_12-06-20_105718.txt	Demo Library	10	ISBN	12/06/2020 9:57 AM	
isbn_12-06-20_100356.txt	Demo Library	44	ISBN	12/06/2020 9:03 AM	
isbn_10-18-20_103637.txt	Demo Library	11	ISBN	10/18/2020 9:36 AM	
isbn for demo.txt	Demo Library	8	ISBN	10/13/2020 1:15 PM	
demo2 isbn search.txt	Demo Library	7	ISBN	10/06/2020 1:04 PM	
demo isbn search.txt	Demo Library	7	ISBN	09/29/2020 1:02 PM	
upcs for demo.txt	Demo Library	9	UPC	09/22/2020 1:02 PM	
isbn_09-21-20_052245.txt	Demo Library	19	ISBN	09/21/2020 4:22 PM	

4

Mark Upgraded Records for Extract 5 Search Cancel Back

If you select **Folder** for your search, you'll need to select the folder you wish to search by double-clicking on the folder name in the Folder Search pop-up window. From here, you can select all titles or specific titles by placing a checkmark next to the title name. Click **Select Records** once you're done making your selections.

**Folder Search**

merge1

- Demo Library (2924)
  - + erics\_folder (9)
  - + merge1 (11)
  - + merge2 (0)
  - sanity\_test (12)

<input checked="" type="checkbox"/>	Title	ISBN	UPC	RecordNumber
<input checked="" type="checkbox"/>	Scents and sensibility...	9781410483751		49131564
<input checked="" type="checkbox"/>	Heart of barkness / S...	9781250297723		49131572
<input checked="" type="checkbox"/>	Find me in Havana : a...	9781799958697		49161522
<input checked="" type="checkbox"/>	Nellie Bly / Luciana Ci...	1419750178		49161625
<input checked="" type="checkbox"/>	Lady Osbaldestone's ...	9781925559439		43450589
<input checked="" type="checkbox"/>	Fast ice / #1 New Yor...	9780593348345		49161961
<input checked="" type="checkbox"/>	Relentless / Mark Gre...	9780593395653		49161652

Select records Close

The ISBN and/or UPC numbers you selected will appear within the **Numbers** field on the main Batch Search page. If you want to add more records, click **Select Numbers** to select more records from additional folders.

**Batch Search**

Select: Folder  Upload File: Choose a File  Numbers(9) \*

9781410483751  
9781250297723  
9781799958697  
1419750178  
9781925559439

If you want to come back to your results later, click on **Batch Details** at the top of any page in the system.

Keyword  Title  Word  Author  Word  LC Classification  Word  Pub Date Start  To  Pub Date End

+ Add / Remove Fields Switch Customer New Record New Authority Record Clear Search My Searches

Home **Admin** User Settings Customer Settings Reports

Click directly on the text file to open it. Records can display under three separate tabs:

- **Saved Records** – Records saved during the batch processing. Titles are automatically saved if there is one clear Best Record match found for that ISBN/UPC/etc. If there is not a clear Best Record, the title will be placed in the Records to Review tab. This is based on the Best Record Preferences and Catalog Search Order for each organization.
- **Upgrade Available** – Records that had an upgrade available display within this tab. If you've selected **Automatic Merge** within [Customer Configuration](#), you will not have to manually save these records as they will be saved for you automatically; your records will be automatically placed in the Saved Records tab.
- **Records to Review** – Records that were not a clear Best Record.
- **Not Found** – Displays any records not found within the batch search.

**Batch Search Results**

List of Batches

File Name	Customer	No. of records	Type	Batch Date	Delete
<input checked="" type="radio"/> folder_03-12-21_022607.txt	Demo Library	9	Folder	03/12/2021 1:26 PM	<input type="button" value="Delete"/>
<input type="radio"/> demo3 isbn search.txt	Demo Library	13	ISBN	03/08/2021 4:10 PM	<input type="button" value="Delete"/>
<input type="radio"/> folder_03-07-21_102411.txt	Demo Library	11	Folder	03/07/2021 9:24 AM	<input type="button" value="Delete"/>

Saved Records (0) **Upgrade Available (9)** Records to Review (0) Not Found (0)

ISBN/UPC	Best Match Fields	Record Number	Title	Encoding Level	Record Source	Pub Date
<input type="checkbox"/> 1419750178	● D DW LC S G LT	<a href="#">49161625</a>	<a href="#">Nellie Bly / Luciana Cimino; Sergio Algozzino; translated by Laura Garofalo.</a>	Full	Demo Library	2021
<input type="checkbox"/> 9780525542087	● D DW LC S SR G LT	<a href="#">38664869</a>	<a href="#">Fool's paradise / Mike Lupica.</a>	Full	Demo Library	2020
<input type="checkbox"/> 9780593348345	● D DW LC S SR G LT	<a href="#">49161961</a>	<a href="#">Fast ice / #1 New York times bestselling author Clive Cussler and Graham Bro...</a>	Full	Demo Library	2021
<input type="checkbox"/> 9780593395653	● D DW LC S SR G LT	<a href="#">49161652</a>	<a href="#">Relentless / Mark Greaney.</a>	Full	Demo Library	2021
<input type="checkbox"/> 9781250297723	● D DW LC S SR G LT	<a href="#">49131572</a>	<a href="#">Heart of barkness / Spencer Quinn.</a>	Full	Demo Library	2019
<input type="checkbox"/> 9781410483751	● D DW LC S SR G LT	<a href="#">49131564</a>	<a href="#">Scents and sensibility: a Chet and Bernie mystery / Spencer Quinn.</a>	Full	Demo Library	2016
<input type="checkbox"/> 9781432885335	● D DW LC S SR G LT	<a href="#">49161516</a>	<a href="#">Paradise Peak / Janet Dailey.</a>	Full	Demo Library	2021
<input type="checkbox"/> 9781799958697	● D DW LC S G LT	<a href="#">49161522</a>	<a href="#">Find me in Havana: a novel / Serena Burdick.</a>	Other	Demo Library	2021
<input type="checkbox"/> 9781925559439	● D DW LC S SR G LT	<a href="#">43450589</a>	<a href="#">Lady Osbaldestone's Christmas intrigue / Stephanie Laurens.</a>	Full	Demo Library	2020

The ISBN/UPC, Title, and Record Number in the grid are all hyperlinked so you can click on one to execute a search against the catalogs. If you need to perform a manual search, you can do so as well. Once you perform a search, you can click the **Return to Batch** button to return to your results.

**Note:** If you are searching a Z39 database, a red circle icon with an exclamation point will display next to any searches where the Z39 endpoint returned an error instead of a set of search results.

When viewing **Records To Review**, place a checkmark next to the record(s) you wish to keep and then click **Save**. That record will then be moved from the **Records to Review** tab to the **Saved Records** tab.

**Note:** You can select multiple records to save at once by clicking on the search result on the left side of the page (1), and then selecting the record you wish to keep in the middle of the page (2). A green checkmark will display next to the search results that you have made a selection within.

If you want to execute a [macro](#) against the Saved Records tab, select the associated records and then select the appropriate macro from the **Select Macro** field. When you place your cursor in this field, a list of macros will display for your selection.

**Batch Search Results**

List of Batches

File Name	Customer	No. of records	Type	Batch Date	Delete
demo2 isbn search.txt	ExternalInS2	7	ISBN	12/03/2020 12:45 PM	

Saved Records (0) | **Records to Review (7)** | Not Found (0)

ISBN	Best Match Fields	Record Number	Title	Encoding Level	Record Source	Pub Date
5780399580611 (1)	<input type="checkbox"/>	4638440	<a href="#">The Lumberjanes BEASTiary - the most amazing guide to all the coolest creatures you've ever heard of and a few you haven't / by April Jo Maj Molly</a>	Full	BTCAT	2020
5780544770348 (2)	<input type="checkbox"/>	0	<a href="#">The Lumberjanes BEASTiary - the most amazing guide to all the coolest creatures you've ever heard of and a few you haven't / by April Jo Maj Molly</a>	Full	KCPLz	2020
5780892394234 (2)	<input type="checkbox"/>	4636441	<a href="#">The Lumberjanes BEASTiary - the most amazing guide to all the coolest creatures you've ever heard of and a few you haven't / by April Jo Maj Molly</a>	Full	BTCAT	2020
5781419736445 (3)	<input checked="" type="checkbox"/>					
5781419742323 (2)	<input type="checkbox"/>					
5781479878284 (1)	<input type="checkbox"/>					
5781587434402 (1)	<input type="checkbox"/>					

Save Cancel Back

Once your records have been moved to the **Saved Records** tab, you can select the ones you wish to extract by placing a checkmark next to them (1) and clicking **Mark for Extract** (2). An email will be sent to you with a link to a file containing the extracted records that you can download immediately.

**Batch Search Results**

List of Batches

File Name	Customer	No. of records	Type	Batch Date	Delete
demo2 isbn search.txt	ExternalInS2	7	ISBN	12/03/2020 12:45 PM	

Saved Records (4) | Records to Review (3) | Not Found (0)

Mark for Extract	ISBN	Extracted Date	Best Match Fields	Record Number	Title	Encoding Level	Record Source	Pub Date
<input checked="" type="checkbox"/>	5780399580611			2845989	<a href="#">Evil food and wine - Fresca cooking from Northern Italy's mountains, upwards and seaside / Bobby Stuckey Lachlan</a>	Full	ExternalInS2	2020
<input checked="" type="checkbox"/>	5781419736445			2845988	<a href="#">The Lumberjanes BEASTiary - the most amazing guide to all the coolest creatures you've ever heard of and a few you h</a>	Full	ExternalInS2	2020
<input checked="" type="checkbox"/>	5781479878284			2845987	<a href="#">Parachute to DREAM - a legal and political history of the DREAM Act and DACA / Michael A. O'Ryan - with a foreword b</a>	Full	ExternalInS2	2020
<input checked="" type="checkbox"/>	5781587434402			2845987	<a href="#">Glimmering voices - a new look at the seven deadly sins and their remedies / Rebecca Konynkó DeYoung</a>	Pre-Pub	ExternalInS2	2020

Mark for Extract Cancel Back

## Create and Edit Macros

Create and edit macros by going to **Admin > Macros**. The main macros page displays with several options. Double-click directly on a macro to view it.

- **(1)** – At the top of the page, you can select the type of macros you want to view: **Bibliographic** or **Authority**. You can further select the level of macro you wish to view and edit: **Local**, **Global** or **Institutional**. If you want to search for a specific macro, use the search fields provided.
- **(2)** – The icons on the right side of the screen next to each macro allow you to **Clone**, **Edit**, or **Delete** the associated macro, in that order.
- **(3)** – The code displays here for the highlighted macro.
- **(4)** – Select **Reset Filters** to reset any searches or selections you have performed, or click **New** to create a new macro from scratch.

The screenshot shows the 'Admin > Macros' page. At the top, there are navigation tabs: Home, Admin (selected), User Settings, Customer Settings, and Reports. Below the navigation, there are radio buttons for 'Bibliographic' (selected) and 'Authority'. A red circle '1' is next to the 'Bibliographic' radio button. Below this, there are checkboxes for 'Local', 'Global', and 'Institutional', all of which are checked. There are also input fields for 'Institution' and 'Customer', and a 'Search' field. A 'Reset Filters' button and a 'New' button are on the right. A red circle '4' is next to the 'New' button. Below the filters is a table with columns: Name, Description, Level, Institution, Customer, and Key Assignment. The first row is highlighted in blue. A red circle '2' is next to the icons for Clone, Edit, and Delete in the first row. Below the table is a 'Macro Code' section with a code editor. A red circle '3' is next to the code editor. The code in the editor is:

```
1 from btgencat import *
2 from ext_utillib import flag_extract
3
4 def add_246_for_title_contractions(record):
5     # adds 246 $a for varying form of title when contractions present in 245 $a
6     # does not spell out any with apostrophe s, to prevent confusion with possessive nouns
7     varying_contr(record)
8
```

When you click **New**, the below screen displays, providing you with fields for macro naming and an area to enter your macro script. You can choose to save your changes, cancel them, and go back to your search results.

The screenshot shows the 'New Macro' form. At the top, there are radio buttons for 'Bibliographic' (selected) and 'Authority'. Below this, there are fields for 'Name \*', 'Level \*', 'Type', 'Description', and 'Variables'. The 'Name' field is empty. The 'Level' field has a dropdown menu with 'Select Level' selected. The 'Type' field has a dropdown menu with 'Default' selected. The 'Description' field is empty. The 'Variables' field has a table with columns 'Name' and 'Value', and a '+' button. Below this, there are fields for 'Institution', 'CLS Customer', 'File Name', and 'Key Assignment'. The 'Institution' field has a dropdown menu. The 'CLS Customer' field has a search button. The 'File Name' and 'Key Assignment' fields are empty. Below the form is a 'Script' section with a code editor. The code in the editor is:

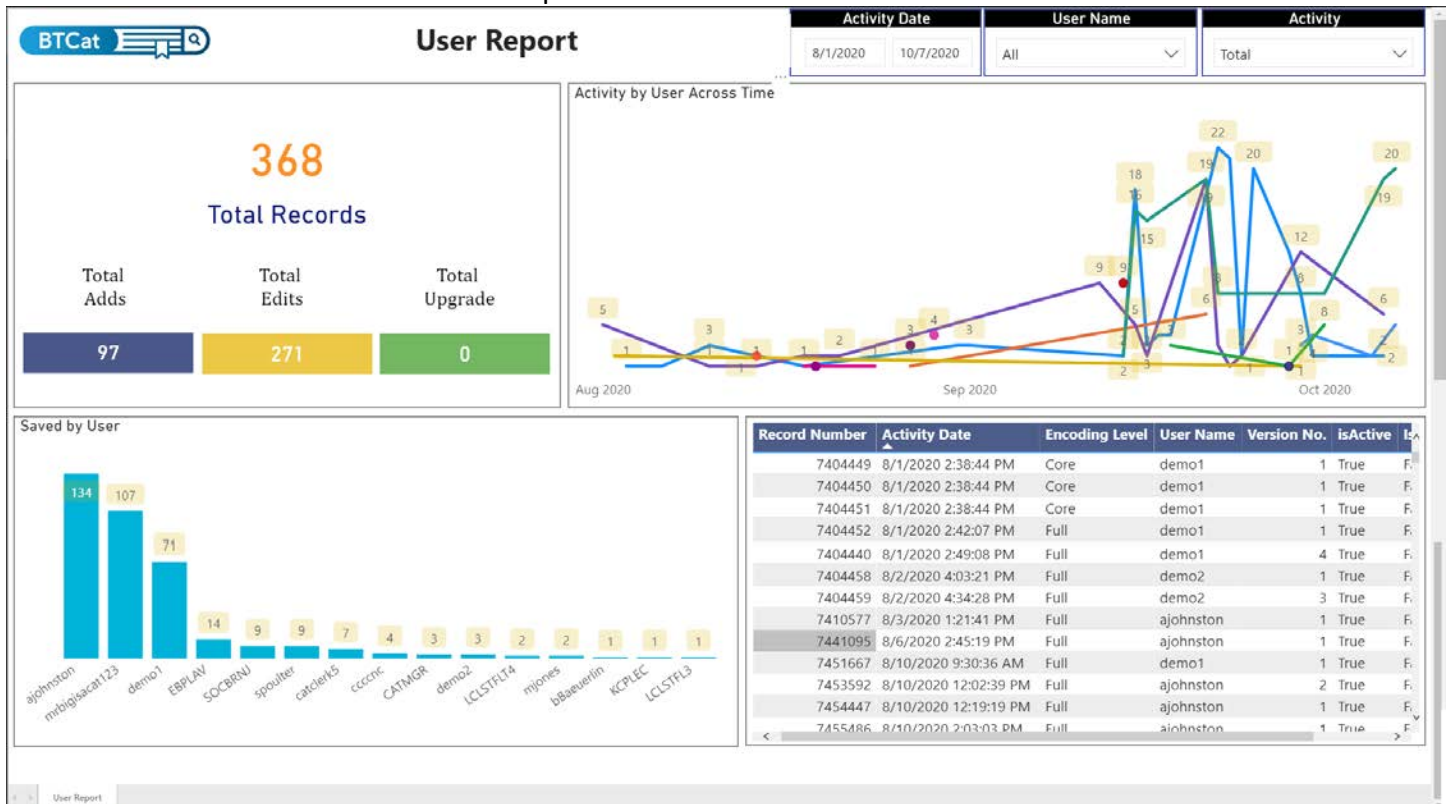
```
1
```

At the bottom right of the form, there are buttons for 'Save', 'Cancel', and 'Back'.

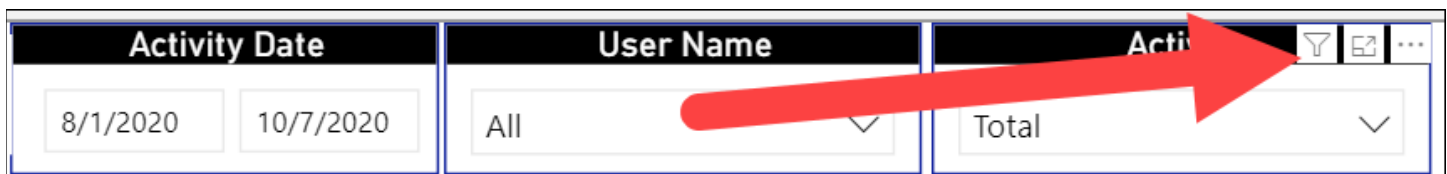
# User Report

Go to **Report > User Report** to view a report detailing the total number of records added and edited by your institution, or by an individual user. Select the dates you wish to view from the **Activity Date** fields. You can view a list of activity for all users by selecting **All** from **User Name**, or you can select an individual user. Select the kind of activity (**Add, Edit, Upgrade, or Total**) from the **Activity** field. The report will automatically update as you make your selections.

To view information about a specific record on the report in graphical format, double click on the **Record Number** in the lower left corner of the report.



Hover over the upper right corner of the report to view additional options. From left to right, you can view the current **Filters** applied to the report, pop the report out via **Focus Mode**, or view **More Options**. Within More Options, you can search for specific information, export the report as a .CSV or .XLSX file, show the data in a table format, spotlight specific areas of the report, and sort information in ascending or descending order.

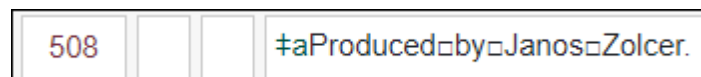


# User Preferences

Go to **User Settings > My Preferences** to set system preferences for your login.

The screenshot shows the 'User Preferences' form. At the top right, there is a link for 'Environmental Settings' (callout 6). The form contains several sections: 'Control Number' (dropdown 'bl'), 'Location' (dropdown 'Bridgewater'), 'Reveal Spaces' (checkbox, callout 1), 'Keep record open on Save' (checkbox, callout 2), and 'Print - Line Spacing' (radio buttons for 'Double Space' and 'Single Space', callout 3). Below these are 'Institution' (dropdown 'B&T'), 'Order of search fields' (checkboxes for Keyword, Title, Author, LC Classification, Pub Date, ISBN with up/down arrows, callout 4), and 'Order of search results columns' (checkboxes for Title, Author, Pub Date, Record Number, Control Number, ISBN/UPC with up/down arrows, callout 5). At the bottom right are 'Save', 'Cancel', and 'Back' buttons.

- (1) Select **Reveal Spaces** to display a small square within your records that will indicate a space, as in the below image.



- (2) – If you want to keep your record open after you save it, select **Keep record open on Save**.
- (3) Select how you want to print any records: in either **Single Space** or **Double Space** (default).
- (4) – Select the fields you want to see in search results, and then use the arrows to order your selections.
- (5) – Select the search results columns you wish to see when you perform a search, and then use the arrows to order your selections.
- (6) – Click on **Environmental Settings** to make changes to your font, background colors, and more. Simply click on a color swatch to bring up a selection panel where you can view a list of colors to choose from.

The screenshot shows the 'Environmental Settings' form. It has two tabs: 'User' (selected) and 'Institution'. The 'Font' section has 'Font Family' (dropdown 'Arial') and 'Size' (dropdown '11pt'). The 'Color' section has 'Tag' (color swatch '#773141'), 'Indicator' (color swatch '#004165'), and 'Delimiter / Subfield' (color swatch '#004e39'). The 'Others' section has 'Background Color' (color swatch '#f7f7f7'), 'Delimiter Symbol' (dropdown '+'), and 'Line Spacing' (radio buttons for 'Double Space' and 'Single Space'). At the bottom right are 'Reset', 'Save', and 'Back' buttons.

Some users can also select where they wish to save their work; to your local workspace or to FTP.

## Customer Configuration Export

Go to **Customer Settings > Customer Configuration** and click on the **Export** tab to open it and update your file export settings if needed.

Once you've selected the **Type** of file upgrade you want, you can then select how often you want the system to look for catalog upgrades via the **Upgrade Period** dropdown. The catalog(s) you select under **Catalog for Upgrade** are the catalogs the system will look at. In addition, you can determine how many records you wish to see upon output, as well as the file format of the output. Finally, if you want to renumber any tags during the output process, you can enter those in the **Renumber Tag** area.

The screenshot shows the 'Customer Configuration' interface with the 'Export Settings' tab selected. The 'Institution' and 'Customer Name' fields are both set to 'Demo Library'. Under 'Export Settings', the 'Type' is 'MARC file', 'Upgrade Service Export' is checked, and 'Upgrade Period' is 'Nightly'. The 'Catalog For Upgrade' field contains 'BTCAT Community'. 'Record count on output' is set to '10000' and 'File Format' is 'Unicode'. The 'Renumber Tag' section includes input fields for '994' and '999', and 'From Tag' and 'To Tag' fields, with a plus sign icon to add more tags.

## Customer Configuration TechXpress

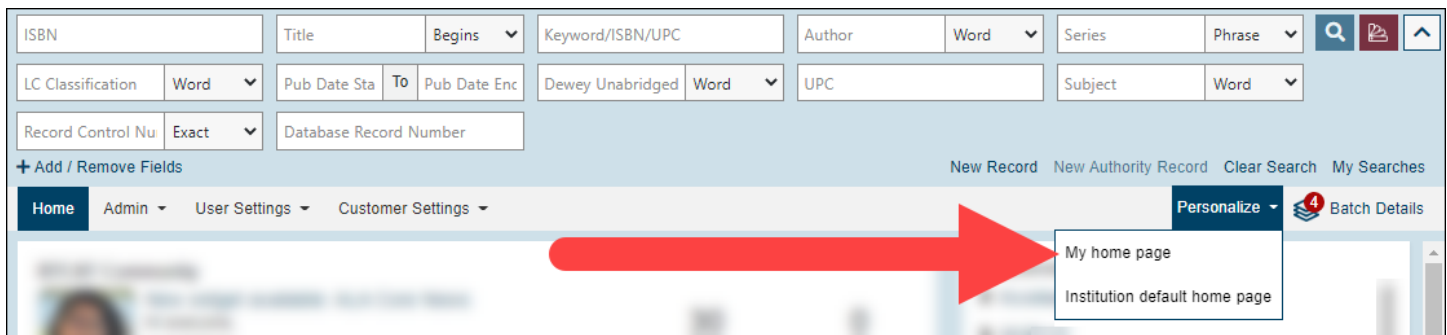
If you are a TechXpress customer, you can opt to have your TechXpress records automatically imported into a BTCAT folder when orders are shipped by selecting the **Opt TechXpress Import** checkbox within **Customer Settings > Customer Configuration > TechXpress Settings** tab. This means that you can import records into BTCAT, edit them, run macros on them, and even look for upgraded records if needed. In order to have this option display for your institution, Baker & Taylor must first set up your profile to use it.

The screenshot shows the 'TechXpress Settings' section with the 'Opt TechXpress Import' checkbox checked.

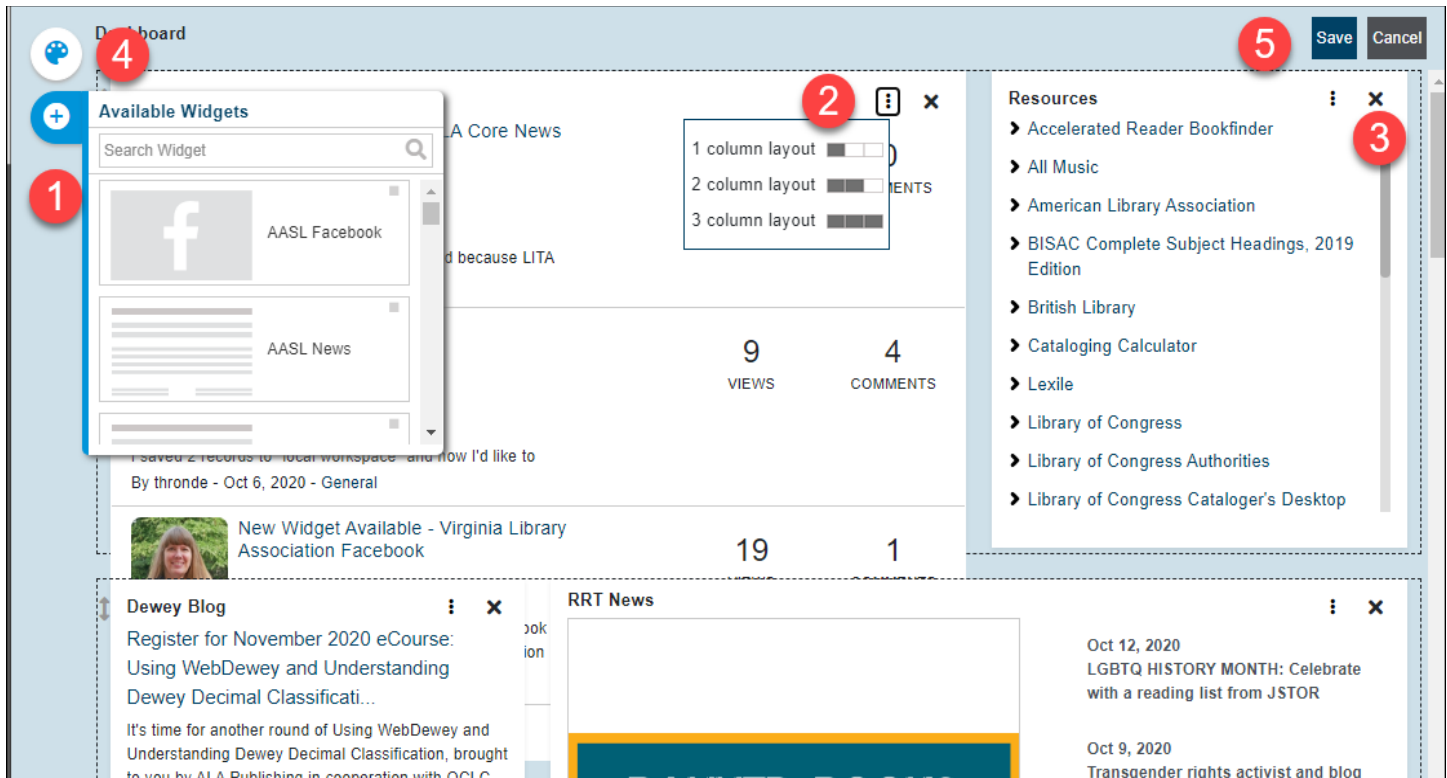
## Personalize Your Home Page

If you have the appropriate permissions, you can personalize your home page with various widgets, including links to the BTCAT Community forums, library news blogs, and more.

Hover over **Personalize** and then select **My Home Page**.



Personalization options will appear as in the screen below.



- **(1)** – Click on the **plus sign** to search for available widgets to add to your home page. Drag and drop available widgets onto the main part of your page, and then rearrange them as you like.
- **(2)** – Set the number of widget columns on your home page by clicking on the **menu icon** and then selecting one, two, or three columns.
- **(3)** – Click the **X icon** to remove a widget from displaying on your home page.
- **(4)** – Click on the **palette icon** to change your background color.
- **(5)** – Click **Save** to save your changes, or **Cancel** to discard them.

## BTCAT Community Forums

The BTCAT Community is a great place to ask questions and connect with other users, as well as Baker & Taylor personnel. You can search for topics, create a new topic, and even answer questions within this forum. Just click on any topic name, category, or quick link to view all associated material for that topic. If you have any active, unread alerts, they will display at the top of the page, next to the **Bell icon**. You can click on the

**Star icon** next to a topic to save it as a favorite, which you can then access via the **Star icon** at the top of the page.

The screenshot shows the BTCat Discussions page. The header includes the BTCat logo, navigation tabs for 'Categories' and 'Discussions', and utility icons for notifications, email, star, and refresh. The main content area lists several discussion topics, each with a title, view/comment count, a 'new' badge, and a star icon. The sidebar on the right contains a search bar, a 'New Discussion' button, and a 'Quick Links' section with categories like 'Categories', 'Recent Discussions', and 'Activity'. Below that is a 'Categories' list with counts for various topics.

Topic Title	Views	Comments	Author	Category
System Down 7/15 3:00-5:00 AM EST	51	5	suryadevaratejaswini	BTCat Announcements
Test discussion with hypertext	21	2	vijaya	BTCat Announcements
Test Library Discussion	10	2	suryadevaratejaswini	BTCat Announcements
Test Announcement	11	5	suryadevaratejaswini	BTCat Announcements
Test Title	8	2	suryadevaratejaswini	BTCat Announcements
Test Discussion	13	3	suryadevaratejaswini	General
Please Read Before Posting	26	2	suryadevaratejaswini	General

Category	Count
All Categories	11
BTCat Announcements	6
Training	1
User Feedback	
ILS-specific Discussions	
L CARL	
L Innovative	
L Horizon (Sirsi-Dynix)	
L Polaris	
L Sirsi	
General	4
Technical Support	

Click on **New Discussion** to create a new topic for discussion within the BTCAT Community forums. You'll be asked to classify your post via the **Select a Category** drop-down. Give your post a **Discussion Title** in the associated field, and then enter your question or comment in the main text box. You can include emojis, pictures, media links, and hyperlinks by clicking on the icons at the bottom of the text box. Click **Post Discussion** to post immediately, or click **Save Draft** to come back later. Click **Cancel** to leave the page entirely.

HOME · NEW DISCUSSION

## New Discussion

Category

Select a category... ▾

Discussion Title

😊 🖼️ ⌨️ 📎

Cancel Save Draft Post Discussion



Click on the **Account Options icon** in the top right corner of the screen to open your notification settings. If you have created a profile picture, your profile picture will display in place of this icon. Here, you can determine how and when you wish to be notified about activity related to your BTCAT Community activity. You can opt to receive emails, or a pop-up message within the BTCAT Community when you log on with new activity.

To upload a profile picture, click on **Change my Picture** and follow the instructions to upload your own image to display in place of the Account Options icon above.

BTCat Categories Discussions

HOME · PROFILE · NOTIFICATION PREFERENCES

## Notification Preferences

Back to Profile

test1

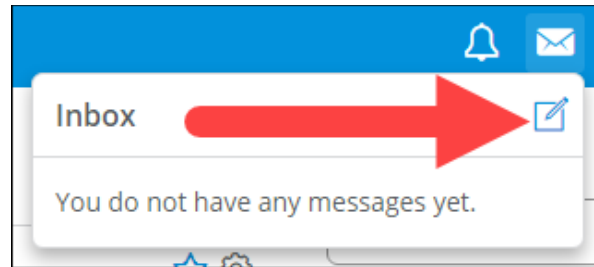
Notification Preferences  
Change My Picture

Notification	Email	Popup
Notify me when people write on my wall.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Notify me when people reply to my wall comments.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Notify me of private messages.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Notify me when people comment on my discussions.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Notify me when people comment on my bookmarked discussions.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Notify me when people mention me.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Notify me when people comment on discussions I've participated in.	<input type="checkbox"/>	<input type="checkbox"/>

Save Preferences



Send a private message to another user within the BTCAT community by clicking on the email icon at the top of the page. Any messages sent to you will display in the associated pop-up. To create a new message, click on the **paper icon**.



Private messages can be sent to up to five recipients. To select your recipients, begin typing in the **Recipients** field. As you type, user names for BTCAT Community members will begin to display that match what you have entered. After selecting your recipients, you can enter your message in the provided text field and then click **Post Message** to send your private message.

HOME · INBOX · NEW MESSAGE

## New Message

You are limited to 5 recipients.

**Recipients**

- test1
- test2
- test6

😊 🖼️ 📄 📎

**Post Message** Cancel