

# Title Assistant

## Items

Tell us what we can improve.

### Related Blog Posts

#### Blog Posts

- [Blog: Items: a few things you may not know...](#)  
created by [Bethany Brown](#)  
Apr 12, 2023  
[Alexandria](#)
- [Blog: Searching by Subject](#) created by [Bethany Brown](#)  
Nov 16, 2022  
[Alexandria](#)
- [Blog: Assigning policies—the complete guide](#)  
created by [Bethany Brown](#)  
Mar 23, 2022  
[Alexandria](#)
- [Blog: Title Assistant to the rescue!](#) created by [Bethany Brown](#)  
Jan 27, 2022  
[Alexandria](#)
- [Blog: Overdue Items Notices? We've got you cover-ed](#) created by [Bethany Brown](#)  
Nov 24, 2021  
[Alexandria](#)
- [Blog: Search smarter!—Combine search results](#)  
created by [Bethany Brown](#)  
Oct 13, 2021  
[Alexandria](#)
- [Blog: Using Contents Notes](#) created by [Bethany Brown](#)  
Sep 23, 2021  
[Alexandria](#)
- [Blog: Introducing... FAQs!](#) created by [Morgan](#)  
Jul 07, 2021  
[Alexandria](#)
- [Blog: Changing call numbers—helpful utilities](#)  
created by [Morgan](#)  
Mar 03, 2021  
[Alexandria](#)
- [Blog: From our librarians—Reusable book menu cards](#)  
created by [Morgan](#)  
Nov 18, 2020  
[Alexandria](#)

[Save as PDF](#)



# Title Assistant



This page has been moved over to <https://support.goalexandria.com/items/title-assistant/>.

Our SmartMarc® tool has been split into two different dialogs to help you differentiate between adding a new title and updating an existing title's MARC tags.

Matched records are saved in a MARC format which can be easily exported later and then re-imported into any MARC-compatible system.

Before using **Title Assistant**, you may need to configure some information in your Z39.50 Servers preferences for each Z30.50 server that you would like to use for bibliographic record matching. For breakdown of all the configurable options belonging to a Z39.50 Site address and step-by-step instructions on how to create, duplicate, edit, and remove your own Z39.50 Sets, check out [z39.50 Preferences](#).

To use Title Assistant when creating a new title record:

1. [Log in](#) to Items Management by adding "/items" to the end of your Alexandria URL.
2. Click the **Add +** button at the top and pick **Add title**.
3. The Title Assistant appears; press Skip to enter the item manually, or fill out the search fields.
  - a. The Title Assistant will return more accurate results if you provide the Title and Author; to get the most accurate results, include the ISBN/LCCN.
  - b. You can exclude items that are not books by checking the Search for books only box.
4. Once the information has been entered, press <enter> or click **Search**.
5. Before attempting a Title Assistant, Alexandria will first search your local collection to see if an existing title match can be found. If similar bibliographic matches are found in your local collection, you have the option of selecting one. Don't worry if a local match is not found in your collection—the Title Assistant will automatically continue on with Title Assistant.
6. When a search is successful, all matching bibliographic records are displayed in the Title Assistant Results window, including the title, medium, and location (i.e. the source of the bibliographic record).
7. Locate and select the record that suits your fancy, and press <enter> or click **Continue**. This will populate a new (unlocked for further editing) title record in the Items Management window, with the contents of the selected record.

If you're not satisfied with your search results, go **Back** to refine your search, or click **Skip** to add the new title record manually.

To use Title Assistant to update an existing bibliographic title record:

1. [Log in](#) to Items Management by adding "/items" to the end of your Alexandria URL.
2. Locate the title for whose bibliographic information you want updated via Title Assistant.
3. Make sure the title record you are trying to update contains information in some of the following fields: Title, Author, LCCN, or ISBN/ISSN. You don't need to have information in all the fields listed above, just enough of them to get an accurate match for the bibliographic record you are searching.
  - a. For example, if the title for a book is unique (e.g. A Wrinkle In Time), you may only need to provide the title. However, depending on your needs, it may also be required to provide the author's last name (e.g. L'Engle). For best results, include ISBN.
4. Unlock the item by clicking the **padlock** icon at the top of the window.
5. Go to the Actions menu and select SmartMARC Title Assistant, or use the shortcut (Ctrl+Shift+M) (++M), to open the Title Assistant.
6. When a search is successful, all matching bibliographic records are displayed in the Title Assistant Results window, including the title, medium, and location (i.e. the source of the bibliographic record).
7. Locate and select the record that suits your fancy, and press <enter> or click **Continue**. This will populate a new (unlocked for further editing) title record in the Items Management window, with the contents of the selected record.
  - a. If you're not satisfied with your search results, go **Back** to refine your search.

The existing title record in Items Management will automatically update any incomplete or deficient fields to the current standards and/or specifications. Because the matching record is merged with your existing data, any private tags you might have created will be preserved. Sometimes, this may result in duplicate notes and subject fields which you can remove manually.

More on this page: [Search Settings](#), [SmartMARC Results](#), and [Technically Speaking](#).



## SmartMARC® Title Assistant



Enter information to search for the title you want to add, or press SKIP to add a title manually.

ISBN/LCCN

Z39.50 Set

COMPanion Default Set ▼

Title

Author

Publisher

Publication Year

Keyword

☐ Search for books only

CANCEL

SKIP

SEARCH

### SmartMARC® Title Assistant

**Use:** add a new title with MARC tags from the databases you search from.

**Access :** the plus symbol by the action menu or use keyboard shortcut (mac: + A windows: Ctrl + A).



## SmartMARC® Update

Enter information to search for the title you want to update.

ISBN/LCCN

9781603400619

Z39.50 Set

COMPanion D

Title

Anne of Green Gables

Author

Warren, Eliza Gatewood

Publisher

Abdo & Daughters

Publication Year

2002

Keyword

☐ Search for books only

CANCEL

### SmartMARC® Update

**Use:** update an existing title's MARC tags from the databases you search from.

**Access:** with the title you wish to update current, it's the first use keyboard shortcut (mac: + U windows: Ctrl + U).

## Title Assistant

After using Alexandria over a period of time, some operators find that they have duplicate titles in their database; several records that are really the same item—entries that should have been created as copies under a single title record.

Often, a library has multiple operators cataloging items; this can cause problems simply because each operator might not be familiar with the library, processes the head librarian has in place, or the automation system in general. Sometimes those who add items are aides or students and don't fully understand the need for correctly cataloging and maintaining an organized database—only that they were tasked with getting certain books into the system and printing out barcode labels.

Whatever the reason for items being improperly cataloged, the best way to resolve duplication and cataloging mistakes is to prevent them in the first place.

The Title Assistant provides operators with an enhanced and automated cataloging experience which greatly simplifies the process of finding whether titles already exist in the local collection as well as assisting the cataloger locate complete MARC records.

Alexandria's Title Assistant is a powerful MARC maintenance and retrieval tool that allows you to easily clean and update your bibliographic records by searching a number of user-specified, on-line resources:

- Search from a number of operator-selected and prioritized Z39.50 databases. Free public access Z39.50 databases are available all around the world.
- Search from a well established Alexandria record collection.

Once Title Assistant has located one or more matching records, you can select the closest match and then provide your own "local" information:

- If you are updating a bibliographic record that already exists in your database, it will be checked for accuracy and incomplete or deficient fields will be automatically updated to current standards and/or specifications.
- If you are retrieving bibliographic information for a new title record using the Title Assistant dialog, the selected record information will automatically populate the blank fields of the new record template in the Items management module.

Matched records are saved in a MARC format which can be easily exported later and then re-imported into any MARC-compatible system.

There are two ways to access the SmartMARC Title Assistant:

- The Title Assistant appears after clicking **Add Title** button located at the bottom of the items Records List pane.
- While viewing an unlocked title record, go to the **Actions** menu and select **SmartMARC Title Assistant**. This is useful when updating existing records.



Unknown macro: 'multiexcerpt-include-macro'

## Search Settings

### Search Settings

The Title Assistant window collects some basic title information so that a matching bibliographic record can be located.



#### Quick Tips

- ISBN is the most reliable method to get records for the book you are adding/updating. Otherwise, we recommend using author and title. You'll get poor results if you perform a search without entering a ISBN/title/author.
- To skip Title Assistant and enter your title **manually**, leave all the search fields blank, and you'll be taken directly to an unlocked, new item record.

### Search fields

- **ISBN/LCCN.** Provide a valid ISBN (International Standard Book Number) or LCCN (Library of Congress Control Number) number. When this information is included, only results that have an exact ISBN or LCCN match will be returned. If the ISBN you provide is an older 10-digit, it's newer 13-digit counterpart will automatically be calculated and queried as well.

When ISBN/LCCN information is provided, the title and author fields will only be used to rank the search results or create a new manual record if returned results are inadequate.

- **Title.** Performs a "begins with" search. Provide with all or part of the title's name; For example, for Harry Potter and the Order of the Phoenix, type in Harry Potter or Harry. A search by Title can also include Series and/or alternative titles.
- **Author.** Provide all or part of the author's name; for example, for Rick Riordan, type in Riordan, Rick, Rior or Ri. An Author search can also include secondary authors.
- **Publisher.** Provide the publisher's name; for example, for The Crown Publishing Group, type in Crown Publishing Group.
- **Publication Year.** Provide the year of publication.
- **Keyword.** Provide any keywords applicable to the book being searched; for example, entering the Keywords Whales, Whaling, Classics, Ships might help narrow down results for Melville's "Moby Dick". *You must be searching by another term in order to search by keyword.*

### Other search tools

- **Search for books only.** You can force Title Assistant to only search for books by checking the Search for books only box. If selected, Title Assistant results will filter out all results that are not books (as defined by their 245\_h tag). However, if you like, you can allow items that are not books (e.g. DVD, eBooks, CDs) by leaving this box blank. Please note that this does NOT find RDA-formatted 'text-unmediated-volume' mediums.
- **Z39.50 Set.** Choose the Z39.50 collection of addresses that you would like the Title Assistant to search for potential MARC record matches. Although the default is COMPAnion Default, the last selected Z39.50 Set will be remembered (per operator) every time you the Title Assistant is opened.

Click **Search** to initiate the Title Assistant search using the information you provided.

## Settings

The Title Assistant window collects some basic title information so that a matching bibliographic record can be located.



- ISBN is the most reliable method to get records for the book you are adding/updating. Otherwise, we recommend using author and title. You'll get poor results if you perform a search without entering a ISBN/title/author.
- To skip Title Assistant and enter your title **manually**, leave all the search fields blank, and you'll be taken directly to an unlocked, new item record.

## Search fields

- **ISBN/LCCN.** Provide a valid ISBN (International Standard Book Number) or LCCN (Library of Congress Control Number) number. When this information is included, only results that have an exact ISBN or LCCN match will be returned. If the ISBN you provide is an older 10-digit, it's newer 13-digit counterpart will automatically be calculated and queried as well. Also, if you provide ISBN/LCCN information, anything you add to the Title and Author fields (described below) will be ignored for the search; however, this information will be used to help score search results and create a new manual records if returned results are inadequate.
- **Title.** Provide all or part of the title's name; performs a "begins with" search. For example, for Harry Potter and the Order of the Phoenix, type in Harry Potter or Harry. A search by Title can also include Series and/or alternative titles.
- **Author.** Provide all or part of the author's name; for example, for J.K. Rowling, type in Rowling, J.K., Rowl or Ro. An Author search can also include secondary authors.
- **Publisher.** Provide the publisher's name; for example, for The Crown Publishing Group, type in Crown Publishing Group.
- **Publication Year.** Provide the year of publication.
- **Keyword.** Provide any keywords applicable to the book being searched; for example, entering the Keywords Whales, Whaling, Classics, Ships might help narrow down results for Melville's "Moby Dick". *You must be searching by another term in order to search by keyword.*

## Other search tools

- **Search for books only.** You can force Title Assistant to only search for books by checking the Search for books only box. If selected, Title Assistant results will filter out all results that are not books (as defined by their 245\_h tag). However, if you like, you can allow items that are not books (e.g. DVD, eBooks, CDs) by leaving this box blank.
- **Z39.50 Set.** Choose the Z39.50 collection of addresses that you would like the Title Assistant to search for potential MARC record matches. Although the default is COMPanion Default, the last selected Z39.50 Set will be remembered (per operator) every time you the Title Assistant is opened.

Click **Search** to initiate the Title Assistant search using the information you provided.

[Back to Top](#)

# SmartMARC Results

## SmartMARC Results

After a search has successfully concluded (or timed out), all the matching bibliographic records are displayed in the results window. Along with the matching Title list, the results window also displays the matching Medium and Location (i.e. the source of the matching bibliographic record).

After this, results are categorized as the following: "**bold**" for local hits and "black" for good or exact matches. Local matches (i.e. results matching bibliographic records already existing in your collection) will be shown first, before other sources in your results list.



## SmartMARC® Title Assistant



Select a title to add it to your collection, or press SKIP to add a title manually. Titles already in your collection are marked in bold; selecting a bolded title will let you add a copy instead.

Title	Medium	Location
<b>Anne of Green Gables</b>	<b>[book]</b>	<b>Local</b>
<b>Anne of Green Gables</b>	<b>[electronic resource]</b>	<b>Local</b>
Anne	performed music-audio-...	OH - Special - OhioLINK
Anne	text-unmediated-volume	OH - Special - OhioLINK
Anne	Book	OH - Special - OhioLINK
<b>Anne of Green Gables</b>	<b>Book</b>	<b>OH - Special - OhioLINK</b>
Anne of Green Gables	Book	OH - Special - OhioLINK
Anne of Green Gables	text-unmediated-volume	OH - Special - OhioLINK
Anne of Green Gables	Book	OH - Special - OhioLINK
Anne of Green Gables	Projected Medium	DC - Special - Library of Cong...
Anne of Green Gables	text-unmediated-volume	OH - Special - OhioLINK

Completed. 3 databases examined


LDR02384cam 2200301 a 4500^  
00110134124^  
0030CoLC^  
00520140207102737.0^  
008830127119831935nyuaf j 000 1 eng ^  
010 \_a83047616^  
020 \_a0448060302^  
020 \_a9780448060309^  
040 \_aDLC\_beng\_cDLC\_dBAKER\_dXY4\_dUBY\_dBTCTA\_dYDX\_dOCLCA\_dOCLCFA  
042 \_alcac^  
043 \_aeng \_a

CANCEL

BACK

SKIP

CONTINUE



### SmartMARC® Update

Select a title from the list below that will be used to update the current title's information.

Title	Medium	Location
The Hunger Games	Book	OH - Special - OhioLINK
The Hunger Games	Book	DC - Special - Library of Congress
The hunger games trilogy	Book	OH - Special - OhioLINK
The hunger games trilogy	text-unmediated-volume	OH - Special - OhioLINK

Completed. 2 databases examined

LDR01963nam 2200421K 4500^  
001768767909^  
0030CoLC^  
00520111219111116.0^  
008111219m20082010nyu 000 0 eng d^  
020 \_a9780439023481^  
020 \_a0439023483 (v.1)^

CANCEL

BACK

UPDATE

Scroll to browse through the matching title records. If you click on a record title while scrolling through, the record's bibliographic information is displayed in the section below.

Once you've located the record that suits your fancy, double-click on it or select (highlight) it and press <enter> (or click the Continue button); this updates an existing or populates a new (unlocked for further editing) title record in the Items Management window with the contents of the selected record.

If you're not satisfied with any of the returned search results, close the window or click the Back button to choose a different Z39.50 Set, and then search other/additional servers defined by their Search Order prioritization.

In summary, the options available from the Title Assistant: Results window are:

- **Back.** Returns to your search parameters; any pending searches are terminated.
- **Skip.** Allows an operator to enter the information manually, as opposed to using data returned from Z39.50.
- **Cancel.** Discards current search results and any pending searches, and closes the Title Assistant window.
- **Continue.** When the selected record is local, another copy is added to the selected title. When the selected record is not local, it is added to the Alexandria database as a new title, and you can add or duplicate copies and/or make additional edits. If no record is found, you are directed to an unlocked new record in either Item View or MARC View, depending on your settings, with the data from the search window (e. g. Title, Author, ISBN/LCCN). Any pending searches are terminated.

[Back to Top](#)

## Title Assistant Results

After a search has successfully concluded (or timed out), all the matching bibliographic records that Title Assistant located are displayed in the Title Assistant: Results window. Along with the matching Title list, the Title Assistant: Results window also displays the matching Medium and Location (i.e. the source of the matching bibliographic record).

After this, results are categorized as following: "**bold**" for local hits and "black" for good or exact matches. Local matches (i.e. results matching bibliographic records already existing in your collection) will be shown first, before other sources in your results list.

Title	Medium	Location
Harry Potter and the Chamber of Secrets	text-unmediated-volui	Local
Harry Potter and the deathly hallows	[book]	Local
Harry Potter and the Goblet of Fire	text-unmediated-volui	Local
Harry Potter and the Half-Blood Prince	[book]	Local
Harry Potter and the prisoner of Azkaban	text-unmediated-volui	Local
Harry Potter and the sorcerer's stone	[book]	Local
Harry Potter and the Chamber of Secrets	[book]	Local

Searching... 3 seconds, 2 of 4 databases examined

```

LDR12076nam 2201393 i 4500^
001MLM00603706^
003MnBnMLM^
00520131114095051.9^
008000915s2000 nyua c 000 1 eng d^
020 _a0439064872^
040 _aMnBnMLM_beng_cMnBnMLM_dMnBnMLM_erda^
043 _ae-uk-en^
05004_aPZ7.R7968_bHar 2000^
08204_223_a[Fic]^
1001 _aRowling, J. K.^
24510_aHarry Potter and the Chamber of Secrets_cby J.K. Rowling ; illustrations by Mary Grandpre_h[book]^
24630_aChamber of Secrets^

```

**Back** **Enter Manually** **Cancel** **Continue**

Use the scroll bar or the <up> and <down> arrow keys on your keyboard to browse through matching title records. If you click on (highlight) a record title while scrolling through the Matching Title List section, the record's bibliographic information is displayed in the Details section.

Once you've located the record that suits your fancy, double-click on it or select (highlight) it and press <enter> (or click the Continue button); this updates an existing or populates a new (unlocked for further editing) title record in the Items Management window with the contents of the selected record.

If you're not satisfied with any of the returned search results, close the window or click the Back button to choose a different Z39.50 Set, and then search other/additional servers defined by their Search Order prioritization.

In summary, the options available from the Title Assistant: Results window are:

- **Back.** Returns to the Title Assistant: Search window; any pending searches are terminated.
- **Enter Manually.** Allows an operator to enter the information manually, as opposed to using data returned from Z39.50.
- **Cancel.** Discards current search results and any pending searches, and closes the Title Assistant window.
- **Continue.** If the selected bibliographic title record is from the local collection when the Continue button is pressed, another copy will be added to the selected title. If the selected record is not local when you click Continue, it will add the record to the Alexandria database as a new title and then allow you to add or duplicate copies or make additional edits before saving. If no record is found, you'll be taken directly to an unlocked, new item record in either Item View or MARC View (the default view for which you've selected to add a new title) with the data you provided in the Title Assistant: Search window (e.g. Title, Author, ISBN/LCCN). Any pending searches will be terminated.

## Technically Speaking

### Technically Speaking...

Want to better understand how the Title Assistant searches for and scores MARC records? Keep reading.

#### How Are Z39.50 Sources Searched?

By design, the Title Assistant will initially, automatically search the last selected Z39.50 Set; this can be reversed by clicking the Back button when the Results window appears and selecting a new Z39.50 Set to search from. In any event, no matter what Z39.50 Set you end up choosing, your local collection will also be searched simultaneously for existing bibliographic matches.

The priority in which servers are searched within the Z39.50 Set depends on their Availability and order—both of which are configurable by editing your [Z39.50 Preferences](#).



Each server in your Z39.50 Set will be continually searched as long as communications are steadfast and active. However, to avoid congestion and deadlocks, Title Assistant will only wait ten seconds after receiving its last response from the Z39.50 server or Alexandria Data Station being searched before assuming that the source is no longer abundant or available. If no further messages are received from the source before the allotted ten second timeout is reached, Title Assistant will move on to the next server in the set. Title Assistant will only stop searching once every server in your set has surpassed the allocated timeout period.

From time to time, you may find that some of the servers you have selected are unresponsive or longer returning results. Machine failures or communication faults will sometimes make it impossible for servers to reply before the timeout period expires.

Although Title Assistant may still be receiving responses from servers (and appear to be searching), only qualifying matches are returned to the Results window. Therefore, it is imperative to specify which Z39.50 databases you would like to use when searching for matching bibliographic records.

COMPanion suggests using our preconfigured COMPanion Default Z39.50 Set, including:

- [DC - Special - Library of Congress](#)
- [OH - Special - OhioLINK](#)

When configuring the Z39.50 Servers or creating your own custom sets (e.g. "Exceptional Spanish Sources"), we usually recommend picking no more than four quality Z39.50 servers, including the Library of Congress and OhioLINK among them. The other two servers can be personal favorites, in-state universities, or perhaps a well-established Alexandria database.

### How does Title Assistant score records?

Title Assistant uses a very sophisticated system to grade MARC records. The full details of this system are a trade secret and will not be shared. However, the following information may help you to understand enough to get the best results in your quest for perfect records.

- All potentially matches are either scored as PASS or FAIL. If a bibliographic record is somehow returned that doesn't match any of the data provided in the Title or Author queries, it's promptly ignored.
- Title Assistant grades MARC records by assigning points for various conditions. Therefore, Title Assistant believes that the highest scoring record is the best possible match. The absolute number itself means nothing from record to record. Thus, a record matching at 100 may be just as good as one matching at 200. Additionally, small changes in the scores may have great significance.
- If you checked the **Search for Books Only** box, Title Assistant will ignore records that are not books or MARC Language Materials. The leader position 6 (type of record) and 245\_h (medium) fields are examined. An "a" in leader position 6 indicates a book, all others are considered non-books. A blank 245\_h, or one containing the word "book," is considered a book—all others are considered non-books.
- Two types of automatic matching errors can occur:
  - A "false positive" occurs when Title Assistant picks a record that it shouldn't.
  - A "false negative" occurs when Title Assistant skips a record that it shouldn't. Title Assistant is biased toward avoiding "false positive" errors because they can result in changing your data from something correct (but brief) to something incorrect (but complete).
- For matching purposes, Title Assistant examines the Title, Author, and ISBN/LCCN fields. In general, larger, more complete records with more matching fields get higher scores.
- When matching fields, those that match exactly get higher scores than those that contain substrings or matching words. Thus, missing or misspelled words in your data will result in fewer matches.
- When either the initial or potential record is missing a match field, a test for that field is not performed. Thus, missing data has no impact on the score. This makes it possible for a record that doesn't contain an ISBN to match against a record which does. Thus, only when fields in both the initial and potential records are found are they compared.
- More complete initial records provide better matching results. Thus, a record that only contains an ISBN may match against the "wrong" record since Title Assistant has no other way to differentiate between records which contain this ISBN.
- When records are automatically updated, the matching record is merged with your initial data, thus preserving any private tags you might have created. This may result in additional notes and subject fields which can be removed manually, if desired.

In closing, our Title Assistant system is getting better every day. If you find results that are "strange," [contact us](#) (a copy of the source record, the database you used for matching and the results you obtained) and, if possible, we'll teach Title Assistant to make better decisions in the future.

[Back to Top](#)