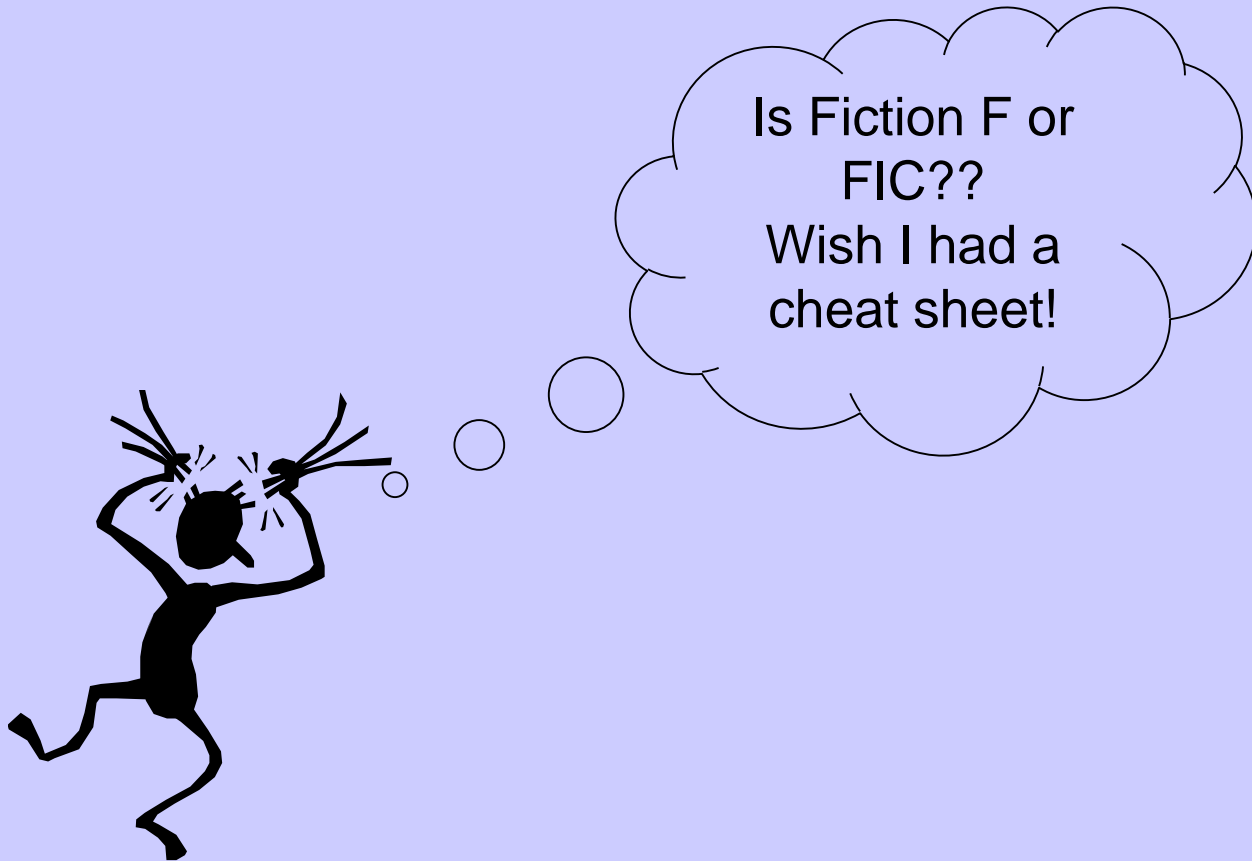


# I. Thou shalt follow the INFOhio cataloging method



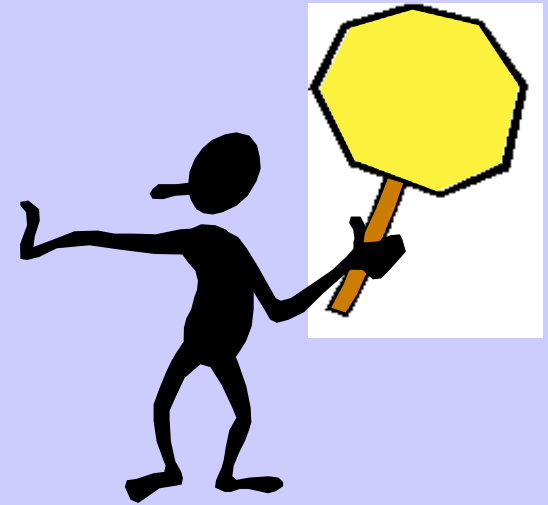
## II. Thou shalt be consistent in your cataloging.



III. Thou shalt search thy own database first for a matching record so as not to create duplicates.



IV. Thou shalt search INFOhio databases first before searching in World Cat.



Gateway name	Description	Selected
CRC	INFOhio Catalog (Free - try before OCLC)	<input checked="" type="checkbox"/>
LC	Library of Congress (Free - try before OCLC)	<input type="checkbox"/>
OCLC	WorldCat Subscription (use if no match in CRC/LC)	<input type="checkbox"/>
TEMPL	INFOhio Template (for Original Cataloging of Materials)	<input type="checkbox"/>

# V. Thou shalt use the Add Brief Title wizard if you can't find a record in SmartPort.

**\*\*REQUIRED FIELD\*\***  
XX(65988.1) ID:65988-1001

Title info

ISBN:	020			
Personal Author:	100	1		
Title:	245			<b>**REQUIRED FIELD**</b>
Publication info:	260			
Physical descrip:	300			
INFOhio template:	989			Brief Record

Call number and copy info

New call number:	XX(65988.1)
Library:	STMES
Item group:	NONFICTION
Shelf location:	AVAILABLE
Item ID:	65988-1001
Material type:	BOOK
Funding source:	



Keep  
searching  
for a better  
record.

# VI. Thou shalt use Local Templates only for locally produced materials.



- Yearbooks
- School publications
- School videos, DVDs

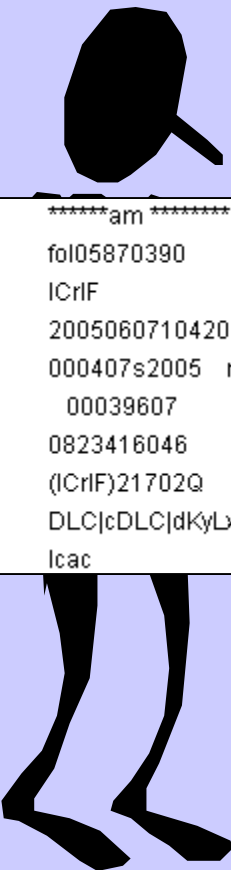
VII. Thou shalt use Original Record Templates for commercially produced materials that don't have records available via SmartPort.



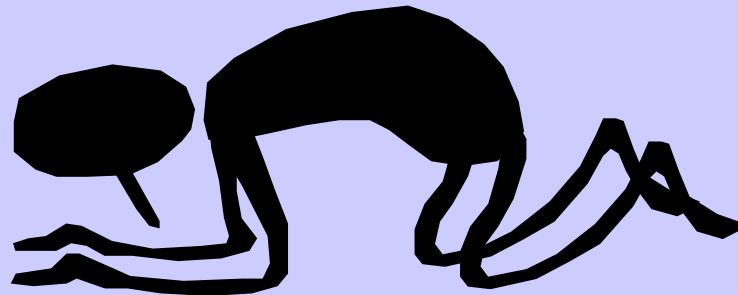
Finally! An easier way to create a bib record!



# VIII. Thou shalt respect the MARC record.



000 \*\*\*\*\*am \*\*\*\*\* a\*\*\*\*\*  
001 fol05870390  
003 ICrIF  
005 20050607104201.4  
008 000407s2005 nyua b b 000\*0beng  
010 00039607  
020 0823416046  
035 (ICrIF)21702Q  
040 DLC|cDLC|dKyLxBWl|dICrIF  
042 lcac



IX. Thou shalt follow the documentation carefully - don't get creative!

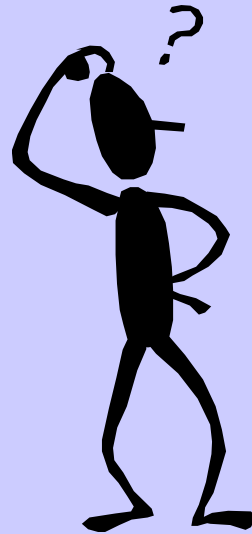


X. Thou shalt be humble: you don't know what you don't know!



The MARC record is a complicated, but logical thing. Everything in it is there for a reason, even if you don't know why!

You don't need to memorize all the tags, subfields, and delimiters, just realize they're there for a reason.



Here are some examples:  
 This record has the date as well as other info in the leader entered incorrectly.

Fleas : bloodsucking parasites / Llamas, Andreu.

Control Bibliographic | Call Number/Item | Bound-with |

Shadow title

Rec_Type	a	Bib_Lvl	m	TypeCtrl		Enc_Lvl	
Desc	a	Entrd	9612	Dat_Tp	s	Date1	1997
Date2		Ctry	wiu	Illus	ab	Audience	
Repr		Cont	j b	GovtPub		ConfPub	
Festschr		Indx	0	Fiction	1	Biog	
Lang	0 e	Mod_Rec	n	Source	g		

Should be YYMMDD

	Tag	Ind.	Contents
	001		CCE96603352
	003		KToSCC
	005		20001019112838.0
	010		96046932 /AC
	020		0836816501
	040		DLC cDLC dKToSCC
	050	00	QL599.5 b.L5313 1997
	082	14	595.77 212
	100	1	Llamas, Andreu.
	245	10	Fleas : bbloodsucking parasites / cby Andreu Llamas ; ill. by Gabriel Casadevall and Ali Garousi.
	260		Milwaukee, WI : bG. Stevens, c1997.

As a result, the Shelflist report showing publication dates is wrong.

INFOhio :: CAT : Shelf List (catitemlist - brief)

Pub. Year	Call Number	Barcode	Status	Title
3001	PB N	30488100648253	AVAILABLE	Nobody's th
3001	PB N	30488100648261	AVAILABLE	Nobody's th
3001	PB N	30488100650861	AVAILABLE	Nobody's th
8603	PB Z	30488100435339	AVAILABLE	The pigman
8603	PB FIC ZIN	30488030658935	AVAILABLE	The pigman
8603	PB FIC ZIN	30488030618863	AVAILABLE	The pigman
8603	PB FIC ZIN	30488030670302	AVAILABLE	The pigman
8603	FIC ZIN	30488080201313	AVAILABLE	The pigman
8606	PB V	30488100435289	AVAILABLE	Homecoming
8606	PB V	30488100609396	AVAILABLE	Homecoming

# Another example - Series search

When the number in the series is entered with no subfields, a hyperlink search only results in other records for the same number.





440 0 Baby-sitters little sister #109

Series : [Baby-sitters little sister #109](#)

Your search for "se "Baby-sitters little sister #109"" found 2 matching records (of 2 retrieved thus far).  
Your final result set will contain an estimated 2 records.

[Full Record List](#) | [Summary Search Results](#) | [Refine Search](#) | [View Your Book Bag](#) | [Add All Items to Book Bag](#)

Unsorted

	1. <a href="#">** Karen's show and share / Ann M. Martin ; illustrations by Susan Crocca Tang. Martin, Ann M., 1955-</a>		
	LEECA High School - Fiction Collection	FIC MAR	Available
	2. <a href="#">Karen's show and share / Ann M. Martin ; illustrations by Susan Crocca Tang. Martin, Ann M., 1955-</a>		
	LEECA Elementary School - Paperback Collection	PB F MAR	Available

# When the number is entered correctly in subfield v, the whole series will display.

440 0 Baby-sitters little sister ;|v#109






Series : Baby-sitters little sister ; #109

Your search for "se "Baby-sitters little sister ;"" found 29 matching records (of 29 retrieved thus far).  
Your final result set will contain an estimated 29 records.

[Full Record List](#) | [Summary Search Results](#) | [Refine Search](#) | [View Your Book Bag](#) | [Add All Items to Book Bag](#)

Result Pages: [[<< prev](#)] [1](#) [2](#) [3](#) [[next >>](#)]

Unsorted

	1. <a href="#">** Karen's show and share / Ann M. Martin ; illustrations by Susan Crocca Tang. Martin, Ann M., 1955-</a>	LEECA High School - Fiction Collection	FIC MAR	Available
				
	2. <a href="#">Karen's show and share / Ann M. Martin ; illustrations by Susan Crocca Tang. Martin, Ann M., 1955-</a>	LEECA Elementary School - Paperback Collection	PB F MAR	Available
				
	3. <a href="#">Karen's president / Ann M. Martin ; illustrations by Susan Crocca Tang. Martin, Ann M., 1955-</a>	LEECA Elementary School - Fiction Collection	F MAR	Available



## 600 Technology & Applied Sciences

- 610 Medicine
- 620 Engineering
- 630 Agriculture
- 640 Home economics (cooking)
- 650 Management
- 660 Chemical engineering
- 670 Manufacturing
- 680 Manufacture for specific uses
- 690 Building



## 700 Arts, Sports, Recreation

- 710 Civic & landscape art
- 720 Architecture
- 730 Plastic arts (sculpture)
- 740 Drawing & decorative art
- 750 Painting
- 760 Graphic arts
- 770 Photography
- 780 Music
- 790 Recreation, performing arts, sports



## 800 Literature & Rhetoric

- 810 American
- 820 English & Old English
- 830 Germanic
- 840 French
- 850 Italian, Romanian
- 860 Spanish, Portuguese
- 870 Latin
- 880 Greek

- 890 Other literatures



## 900 Geography, History, Biography

- 910 Geography, travel
- 920 Biography, genealogy, insignia
- 930 Ancient world
- 940 Europe
- 950 Asia
- 960 Africa
- 970 North America
- 980 South America
- 990 Other areas



*How do we Dewey?*

Use the Dewey Decimal System to locate books of interest.

Ex. Looking for painters?

1. Find the 100's section that has your general topic of interest.  
700's = Arts
2. Narrow it down to a range of ten.  
750's = Painting
3. Go to the shelves and browse the 750s!!



## 000 Generalities



- 000 Technology (computers)
- 010 Bibliography
- 020 Library & information science
- 030 General encyclopedias
- 050 General serial publications
- 060 Organizations
- 070 Journalism, publishing, media
- 080 General collections
- 090 Manuscripts & rare books

## 100 Philosophy & Psychology

- 100 Philosophy
- 110 Metaphysics
- 120 Epistemology, causation, humankind
- 130 Paranormal phenomenon
- 140 Specific philosophical schools
- 150 Psychology
- 160 Logic
- 170 Ethics
- 180 Ancient, medieval, Oriental philosophy
- 190 Modern western philosophy



## 200 Religion



- 200 Religion
- 210 Philosophy & theory of religion
- 220 Bible
- 230 Christianity
- 240 Christian moral & devotional theology
- 250 Christian orders & local church
- 260 Social & ecclesiastical theology
- 270 History of Christianity & Christian sects
- 280 Christian denominations
- 290 Comparative religion & other religions

## 300 Social Sciences



- 310 Statistics
- 320 Political science
- 330 Economics
- 340 Law
- 350 Public administration & military science
- 360 Social programs & services
- 370 Education
- 380 Commerce
- 390 Customs, etiquette, folklore



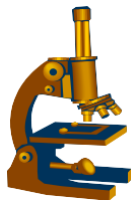
## 400 Language



- 410 Linguistics
- 420 English & Old English
- 430 Germanic
- 440 French
- 450 Italian, Romanian, Romanic
- 460 Spanish & Portuguese
- 470 Latin
- 480 Greek
- 490 Other languages

## 500 Natural Sciences & Math

- 510 Math
- 520 Astronomy
- 530 Physics
- 540 Chemistry
- 550 Earth sciences
- 560 Paleontology
- 570 Life sciences
- 580 Plants
- 590 Animals



## Guidelines for Evaluating MARC Records

These guidelines are intended to help you:

- evaluate the quality of a MARC record
- recognize errors and omissions
- identify enhancement opportunities

These guidelines are NOT intended for:

- original cataloging
- modifications which result in a NEW bibliographic record, i.e., you determine that the item in hand does not match an existing bibliographic record but only a couple modifications would create the needed record. Perhaps the item differs only in edition, date and pagination. Since such changes result in a new bibliographic record, additional changes to control fields must also be made. Those are addressed in *Guidelines for Derived Cataloging*. Therefore, do NOT make such modifications without consulting that document.

### Discrepancies between items and bibliographical records

MARC records reflect a variety in input standards, encoding levels, and cataloging rules. Therefore, the decision to modify for the purpose of correcting perceived errors or enhancing a record should be done with caution and care.

A MARC record should reflect all possibilities for the title it represents. The item record reflects what parts of the title a location owns. For example, a MARC record shows a set of 3 vols. but the location only owns only vol.1. The MARC record is not altered.

### Incomplete cataloging

Examples are incomplete cataloging and brief records that vendors provide for new materials.

### IF MODIFYING:

Consult the document *Guidelines for Enhancing MARC Records*.

## Evaluating Fixed Fields

The Leader and mandatory 007 & 008 elements should contain data and not a fill character which is represented by a vertical bar ( | ).

The 007 field is for non-print material. The first data element "Material Type" is mandatory.

The mandatory 008 elements are identified in the table below.

<b>008 ALL MATERIALS</b>	
<b>Date type:</b> <b>Date 1:</b> <b>Lang:</b>	(If date type and/or date 1 are missing, see <i>Guidelines for Derived Cataloging</i> )
<b>BOOKS</b>	Nonfiction = 0 Fiction = 1
<b>Lit text:</b> <b>Biog:</b>	(Blank indicates no biographical material)
<b>NONPRINT</b>	
<b>Type of mat</b> (if not a book):	

**Evaluating Variable Fields**

020	ISBN	<ul style="list-style-type: none"> <li>• Multiple 020 tags for multiple ISBNs</li> <li>• The first 020 tag will be matched for overlay, identify OPAC book cover</li> </ul>
082	Dewey Decimal Number	<ul style="list-style-type: none"> <li>• Should contain 1st indicator, \$a and \$2</li> </ul>
245	Title	<ul style="list-style-type: none"> <li>• Check the second indicator for correct non-filing characters</li> <li>• Check \$h for appropriate GMD</li> </ul>
250	Edition	<ul style="list-style-type: none"> <li>• Should appear as on title page; if absent, then verso</li> </ul>
260	Publication/distribution	<ul style="list-style-type: none"> <li>• Should appear as on title page; if absent, then verso</li> </ul>
300	Physical description	<ul style="list-style-type: none"> <li>• Should reflect item</li> </ul>
440	Series	<ul style="list-style-type: none"> <li>• Check second indicator for non-filing characters</li> <li>• Chief source of reference should be the series title page; title page if no series t.p.; cover if not on title page</li> </ul>
490	Series	<ul style="list-style-type: none"> <li>• If 1st indicator is one (1), there should be an 8xx tag with the series title. MultiLIS indexes the 8xx tag instead of the 490 tag if the first indicator is one (1)</li> </ul>
505	Formatted Contents Note	<ul style="list-style-type: none"> <li>• This field has special punctuation which should be followed</li> <li>• \$a containing the title, with or without the author is the older method</li> <li>• \$t containing the title is the newer method (Although MultiLIS indexes this subfield for a title search, it does not currently support the enhanced 505 when cataloging.)</li> <li>• \$r containing the author is the newer method (Not presently supported in the cataloging module.)</li> <li>• Use of \$t and \$r requires second indicator of zero</li> <li>• The author's name is not reversed</li> <li>• The title will be retrieved on a title search</li> <li>• The author will not be retrieved on an author search</li> <li>• The author must be entered in a 700 tag to be retrieved on an author search</li> </ul>
521	Target Audience	<ul style="list-style-type: none"> <li>• If present, insure proper 1st indicator <ul style="list-style-type: none"> <li>○ 0= Reading grade level</li> <li>○ 1= Interest AGE level</li> <li>○ 2= Interest GRADE level</li> </ul> </li> </ul>
526	Study Program Information Note	<ul style="list-style-type: none"> <li>• If present, insure proper 1st indicator of zero (0) for Reading Program. Subfields \$b Interest level, \$c Reading level, \$d title point value should also be present</li> </ul>
538	System details note	<ul style="list-style-type: none"> <li>• Important for some non-print materials</li> </ul>
6xx	Subject headings	<ul style="list-style-type: none"> <li>• There should always be a second indicator to identify the source of the subject heading</li> <li>• A second indicator of 7 should always have a \$2 with the name of the subject source. Generally this will be Sears</li> <li>• OCLC will use indicator 8 for Sears</li> </ul>
700	Personal name added entry	<ul style="list-style-type: none"> <li>• Needed if retrieval by AUTHOR search desired</li> </ul>

71x	Corporate name added entry	• Needed if retrieval by ORGANIZATION search desired
730	Uniform title added entry	• Needed if retrieval by TITLE search desired
8xx	Series added entries	• Accompanies 490 first indicator of one (1)
856	Electronic Location	• Evaluate. Will the tag function in your database?

## Guidelines for Matching MARC Records

These guidelines are intended to help you determine whether an existing bibliographic record corresponds to an item you are searching.

If an item does not match a bibliographic record, the differences will usually occur in more than one field. If a difference occurs in a single field, you must determine whether there are two separate items with only one significant difference, or whether the difference is due to an error in cataloging or a difference in cataloger opinion. Errors should be corrected and the document *Guidelines for Evaluating MARC Records* is intended as a guide in that process.

## Guidelines for matching all formats

When comparing records, closely examine the bibliographic description to determine whether a bibliographic record matches the item being searched. The bibliographic description in the MARC record should be matched to the preferred source of bibliographic data on the item (item's chief source of information).

### Item's Chief Source of Information

Print (in order of importance)	Non-print
Title page	Item (actual cassette, CD, title frame or label permanently attached)
Verso (back of title page)	Accompanying textual material
Last numbered page	Container box or sleeve
Cover (not the book jacket)	Other sources

## Search Strategies

1. Searching on ISBN is a good way to get a record, but it does not mean you will have a matching record. The item still must be compared to the record. Because publishers sometimes reuse ISBN numbers, matching ISBNs may not represent matching titles. When ISBN fails to locate a record, use the search strategies below.
2. To retrieve an exact title at the Union Catalog, use the semicolon (;) to end the title entry. Otherwise, MultiLIS will call up all titles which contain the words entered regardless of the order in which the words appear in the title.
3. Do a combination author / title search to narrow the search on common titles.
4. Use the sort option when several similar titles appear.
5. When searching for non-print items with corresponding print titles, try including the GMD in the title search (e.g., "Hamlet video\*" to locate video recordings of Hamlet rather than a book). There may be video recordings that do not contain the GMD in the title field and would not be retrieved in such a search. Therefore, use it only when helpful.

*Following table of match points may not apply to serials.*

**The absence or presence of a bibliographic field does NOT indicate a mismatch.**

**Differences** between the item in hand and the record DO indicate a mismatch.

**Variations** do NOT indicate a mismatch.

<b>DIFFERENCES (item &amp; record DO NOT MATCH)</b>	<b>VARIATIONS</b>
<b>028 \$a Publisher Number</b> <ul style="list-style-type: none"> <li>• Difference in publisher number for non-print</li> </ul>	
<b>1xx \$a Author</b>	<b>1xx \$a Author</b> <ul style="list-style-type: none"> <li>• Variations due to form of entry (e.g., pseudonym versus name authority)</li> </ul>
<b>24x \$a Title</b> <ul style="list-style-type: none"> <li>• Difference in wording of title and subtitle</li> <li>• Difference in authors, editors, illustrators</li> </ul>	<b>24x \$a Title</b> <ul style="list-style-type: none"> <li>• Variation resulting from difference in choice of chief source of information</li> <li>• Variation in how title is recorded (e.g., Keats' poetry versus Poetry)</li> <li>• GMD missing (check 300 field to match)</li> <li>• Variation in length resulting from judgment of what constitutes the title proper (e.g., a difference in the placement of subfield \$b)</li> <li>• Variation in bracketed information, capitalization, diacritics, ellipses, initial articles, punctuation or special characters</li> <li>• Variation in expanded forms of non-English abbreviations, numerals, etc.</li> </ul>
<b>250 \$a Edition</b> <ul style="list-style-type: none"> <li>• Difference in numbered edition/version statement</li> <li>• Difference in edition statement which reflects content (student ed. versus teacher's ed.)</li> <li>• Difference in date designation associated with edition (e.g., Draft, Jan. 1989 versus Draft, May 1989)</li> <li>• Difference in statements indicating abridgment, enlargement, etc.</li> <li>• Difference in statements indicating "draft," "preliminary," "revision," etc.</li> <li>• Difference in statements indicating geographic coverage (e.g., Midwest ed. versus Western ed.)</li> <li>• Difference in statements indicating language content (e.g., Spanish ed. versus Italian ed.)</li> </ul>	<b>250 \$a Edition</b> <ul style="list-style-type: none"> <li>• Placement of information in record, 250 versus a 500 tag.</li> <li>• "Paperback edition" if that is the only difference</li> <li>• "Book club edition" if that is the only difference</li> <li>• "First edition" if that is the only difference</li> </ul>

<p><b>260 \$a Place of Publication</b></p> <ul style="list-style-type: none"> <li>• Different country (U.S. versus Great Britain) unless the publication is published by an agency with offices in both countries.</li> </ul>	<p><b>260 \$a Place of Publication</b></p> <ul style="list-style-type: none"> <li>• Place within the same country (Chicago versus New York)</li> <li>• Absence or presence of a place of publication if known only from an outside source (e.g., [Ohio?] versus [S.l.] )</li> <li>• Variation among issues or parts of a serial or multipart item</li> <li>• Variation in choice of place for items with more than one place of publication (e.g., if an item is published in London and New York, a British library enters only London, but a U.S. library enters only New York)</li> <li>• Variation in multiple places of publication as long as the first place is the same (e.g., an item published in Denmark may show only Kobenhavn, but the same item issued in the U.S. shows Kobenhavn and Philadelphia)</li> <li>• Variation in form of name (e.g., Cologne versus Köln)</li> </ul>
<p><b>260 \$b Publisher</b></p> <ul style="list-style-type: none"> <li>• Different publisher</li> </ul>	<p><b>260 \$b Publisher</b></p> <ul style="list-style-type: none"> <li>• Multiple publishers, places of publication, as long as one on the item matches one on the record</li> <li>• Variation in form of the name (e.g., John Wiley &amp; Sons versus Wiley)</li> <li>• Variation in choice of a publisher when the publishers are part of the same organization (e.g., Puffin versus Penguin). In some cases the publisher on the title page may differ from the one on the record. Is the publisher identifier the same in the ISBN (first 5 digits) for both the publisher on the item and on the record? For example, Puffin is part of Penguin. A cataloger may choose to use Penguin as the publisher instead of Puffin.</li> <li>• Absence or presence of a publisher if known only from an outside source (e.g., [A.B. Smith] versus [s.n.] )</li> <li>• Change of publisher among issues or parts of a serial or multipart item</li> <li>• Variation in choice of publisher for an item having more than one publisher</li> </ul>
<p><b>260 \$c Date</b></p> <ul style="list-style-type: none"> <li>• Different publication date</li> <li>• Copyright date must match if that is the ONLY date available, otherwise ignore copyright dates</li> </ul>	<p><b>260 \$c Date</b></p> <ul style="list-style-type: none"> <li>• Variation in copyright dates if the publication dates are the same</li> <li>• Addition of a printing date</li> </ul>

<p><b>300 \$a Extent</b></p> <ul style="list-style-type: none"> <li>• Difference in number of pages is greater than 10</li> <li>• If record is for single volume and the item in hand is two-volumes or vice versa</li> <li>• Difference in number of cassettes, videos, etc.</li> <li>• Different format of item (book, cassette, etc.)</li> <li>• Size of item in some cases (trade versus a board book)</li> <li>• Difference in specific technical details such as sound versus silent or b&amp;w versus col.</li> <li>• Differences in the medium of recorded accompaniment to projected media (e.g., cassette versus disc)</li> <li>• Large print versus regular print</li> <li>• Braille version versus regular print</li> </ul>	<p><b>300 \$a Extent</b></p> <ul style="list-style-type: none"> <li>• Variation of 10 pages or less</li> <li>• Variation of 2 cm. Or less (variation may be due to binding practices)</li> <li>• Accompanying material may be cataloged separately or described in a note</li> <li>• Minor variations because of bracketed or estimated data</li> <li>• Minor variations in paging if that is the only difference</li> <li>• Variation caused by local binding</li> <li>• Variation in paging because of a section (e.g., an index being numbered in one printing and unnumbered in another printing)</li> <li>• Variation in preliminary paging, post paging or separate numbering</li> <li>• Variation in recording data because of different cataloging rules</li> <li>• Variation in the number of parts for an incomplete multipart item (e.g., record indicates 5 v. and the library now has v. 6-7)</li> </ul>
<p><b>4XX \$a Series</b></p> <ul style="list-style-type: none"> <li>• Difference in series name</li> </ul>	<p><b>4XX \$a Series</b></p> <ul style="list-style-type: none"> <li>• Series on item but not in record, or vice versa</li> <li>• Variation in tracing decision of form (e.g., fields 440 versus 490 with 830)</li> </ul>
<p><b>5XX \$a Notes</b></p> <ul style="list-style-type: none"> <li>• Notes indicating the need for different equipment in the case of audiovisual media (e.g., Beta versus VHS)</li> <li>• Described video versus regular video</li> <li>• Notes indicating differences in the language, edition, format, or content of the item may justify a new record.</li> </ul>	<p><b>5XX \$a Notes</b></p> <ul style="list-style-type: none"> <li>• Choice of a specific 5xx field versus a general field 500 note</li> <li>• Notes indicating the presence of accompanying material</li> <li>• Notes relating solely to holdings, in-house binding, missing pages and other imperfections, etc.</li> </ul>
<p><b>505 \$a Formatted Contents Notes</b></p> <ul style="list-style-type: none"> <li>• Difference in contents when note is complete</li> </ul>	<p><b>505 \$a Formatted Contents Notes</b></p> <ul style="list-style-type: none"> <li>• Variation due to completeness</li> </ul>
<p><b>538 \$a System details Note</b></p> <ul style="list-style-type: none"> <li>• Differences in required access</li> </ul>	<p><b>538 \$a System details Note</b></p> <ul style="list-style-type: none"> <li>• Location of system details information within the record</li> </ul>
<p><b>753 \$a System Details Access to Computer Files</b></p> <ul style="list-style-type: none"> <li>• Differences in technical details</li> </ul>	<p><b>753 \$a System Details Access to Computer Files</b></p> <ul style="list-style-type: none"> <li>• Location of system details information within the record</li> </ul>



## How to enter Common USMARC Tags in Sirsi Cataloging (Example of BOOK record listed)

Certain parts of a catalog record contain descriptive information that is transcribed from the item being cataloged. The title, for example, displays in the description much (or exactly) as it displays on the title page, although punctuated according to certain cataloging rules. Headings are text added to the descriptive portion, usually repeating and standardizing certain parts of the bibliographic information already transcribed in the descriptive text.

Just as the information on a catalog card is positioned and punctuated to certain rules, the same information on a machine-readable catalog record is arranged and delimited to similar rules. All parts of the original cataloging are retained, but certain elements are added to take advantage of machine-readable text functions. The full USMARC instructions for delimiting machine-readable cataloging are available from the Library of Congress and described in MARC Formats for Bibliographic Data.

(SEE: <http://lcweb.loc.gov/marc/bibliographic/ecbdhome.html> )

### Examples - selecting appropriate entries (tags) for BOOK record

The bibliographic tags fall into groups.

<b>Group</b>	<b>Description</b>
010	tags for control numbers, call numbers, and codes
100	tags for main entries
200	tags for title information
300	tags for physical description
400	tags for series (traced and untraced)
500	tags for notes
600	tags for subject tracings
700	tags for added author and added title tracings
800	tags for series traced differently
900	tags defined for local use

### Call Numbers and Control Code

#### 010 - Library of Congress Card Number (LCCN)

Enter the LC card number in the form 99-999999 if the number is present on the card. For information about the new LCCN four-digit year format, refer to <http://lcweb.loc.gov/marc/lccn.html> . This change in the structure of the LCCN will have no affect on your system. Displays of the LCCN simply show the number as entered. When cataloging, some customers may use the LCCN to set the title control number used. This too will not be affected by the change in the LCCN structure, as the system uses the LCCN as entered, other than removing spaces and some punctuation.

**Example:** *The item contains the following LCCN: 2003-102525*  
*The entry should look like the following entry.*

<input type="text" value="010"/>	<input type="text" value="2003102525"/>
----------------------------------	---

## 020 - International Standard Book Number (ISBN)

This long number (10 or 13 characters) may display on the book, either on the verso page or on the back cover. It usually displays with hyphens.

**Example:** *The item contains the following ISBN: 0-807-22031-0 or 978-080722031-3*

It should be entered in the following form (do not enter hyphens).

0807220310 or 9780807220313

More than one ISBN may display on the title record.

**Example:** *The item contains the following ISBNs.*

ISBN: 0807220302    ISBN: 0807220310    ISBN: 9780807220313

Insert a second 020 field for the second ISBN, third 020 field for the third ISBN. The entries should look like the following entries.

▼	ISBN	020	0807220302
▼	ISBN	020	0807220310
▼	ISBN	020	9780807220313

## 040 - Cataloging Source

This field contains:

Subfield a: Original cataloging agency (not repeatable)

Subfield c: Transcribing agency (not repeatable)

Subfield d: Modifying agency (repeatable)

**Example:** *In the following 040 tag – if making modifications to record, enter your LC/NUC code in subfield d: (see <http://www.infohio.org/UC/LOCcodes.html>)*

▼	040	CrF dCrF dCrF dKyLxBWl dCrF
---	-----	-----------------------------

## Main Entries Tags

All of the USMARC tags beginning with the number one and followed by two digits, are for main entries.

**1XX - this tag and subfield a cannot be repeated.** This field is subject to authority control.

### 100 - Personal Author Main Entry

If the creator of a book is a person, enter their name in the 100 field. The form of name used here is used in every record where this person is the main author, a contributing author, or where this person is the subject of the book. This is a heading field. Separate birth and/or death dates from the author's name by using a pipe symbol (|) followed by a lowercase letter d. This is optional. End the field with a period.

## 100 - Personal Name

- 1<sup>st</sup> indicator
  - 0 Forename
  - 1 Surname
- 2<sup>nd</sup> indicator blank

**Example:** *The item's main entry contains the following name.*

Rowling, J. K.

The entry should look like the following entry:

▼	100	1	Rowling, J. K.
---	-----	---	----------------

## 110 – Corporate Name

- 1<sup>st</sup> indicator will generally be a 2 (name in direct order).
- 2<sup>nd</sup> indicator blank

## 111 – Meeting Name

- 1<sup>st</sup> indicator will generally be a 2 (name in direct order).
- 2<sup>nd</sup> indicator blank

## Title Tags

### 245 - Main Title Entry

Every item has a title. Transcribe the title from the title page of the book into the 245 field. There is only one 245 entry in a bibliographic description. This is a descriptive text field. The 245 field has two special markers after the tag number called indicators. Indicators have a variety of uses, but the second indicator for the 245 field is a nonfiling indicator. A number from 0 - 9 entered in this position represents the number of characters before the first significant character.

**NOTE:** *This tag and subfields a, b, c, and h cannot be repeated.*

#### 245 Title

- 1<sup>st</sup> indicator
  - 0 When no 1XX tag is present
  - 1 When a 1xx tag IS present
- 2<sup>nd</sup> indicator – number of non-filing characters for leading article.
 

The = 4	A = 2	An = 3	Les = 4
---------	-------	--------	---------

Punctuation: This tag will always end with a period.

Subfield b – if this subfield is present, the preceding subfield will end with a space followed by a colon ( :).

Subfield c – if this subfield is present, the preceding subfield will end with a space followed by a slash ( /).

Additional subfields: If a subfield n (number of part) or p (name of part) is added to the

245 tag, it is added immediately after the content in a, and before h.

Punctuation for additional subfields:

Subfield n data follows a period (.)

Subfield p data follows a period (.) when preceded by subfield a or another subfield p.

Subfield p follows a comma (,) when it follows subfield n.

**Examples:** *This entry has a nonfiling indicator of 0 because no characters are skipped in order to sort this title by the first significant word "Harry".*

▼	245	10	Harry Potter and the Order of the Phoenix/ cby J.K. Rowling ; illustrations by Mary GrandPré.
---	-----	----	---

*This entry has a nonfiling indicator of 4 because the title is to be sorted by the first significant word "good"; 4 characters are skipped at the beginning of the field (T,h,e,[space] = 4).*

▼	245	14	The good-bye book / cby Judith Viorst ; illustrated by Kay Choraao.
---	-----	----	---

*This entry has a nonfiling indicator of 2 because if this title is to be sorted by the first significant word "raisin"; 2 characters are skipped at the beginning of the field (A,[space] = 2).*

▼	245	12	A raisin in the sun / cby Lorraine Hansberry; with a new introduction by Robert Nemiroff.
---	-----	----	---

The 245 field may contain a statement of responsibility that displays on the title page of the cataloged item. It can be a phrase beginning with "by," "written and illustrated by," "edited by," "introd. by," "Editors:," "with a foreword by," or the title may just be followed by the author's name. In AACR2 cataloging rules a slash displays between the end of the title and the first portion of the statement of responsibility. If a statement of responsibility displays in the title information, separate it from the title proper, parallel titles, and subtitles by using a pipe symbol (|) plus a lowercase c.

**Example:** *The title field contains the following lines.*

A raisin in the sun / by Lorraine Hansberry; with a new introduction by Robert Nemiroff.

The entry should look like the following entry.

▼	245	12	A raisin in the sun / cby Lorraine Hansberry; with a new introduction by Robert Nemiroff.
---	-----	----	---

## 240 - Uniform Title

If a book has a primary creator, but has a title proper that varies from the title the item is universally known by, then describe the book with this special form of title in the 240 field. The 245 field is used to record the exact form of the title as it displays on the title page, but the 240 (uniform title) ties together all versions of the same work by the same author. The form of title used here is used in every record of every version of this author's book. This is a heading field. Like the 245, this field's nonfiling indicator is in the second indicator position. For information on counting and entering nonfiling characters, refer to the preceding examples in 245 - Main Title.

**Example:** *The main entry contains the following lines.*

Dickens, Charles, d1812-1870.

[Christmas carol]

Charles Dickens's A Christmas carol /|abridged by Vivian French ; illustrated by Patrick Benson.

The entries should look like the following entries.

100	1	Dickens, Charles, d1812-1870.
245	10	Christmas carol.
240	10	Charles Dickens's A Christmas carol / cabridged by Vivian French ; illustrated by Patrick Benson.

## 250 - Tag for Edition Statements – this tag and subfield a cannot be repeated.

Enter edition information in the 250 field. It can be a phrase like "Rev. ed.," "1st American ed.," and "6th ed., rev. and enl. by," "[2nd ed.]," or "Ed. 15." This is a descriptive text field. Separate a statement of responsibility statement from the edition statement by using a pipe symbol (|) plus a lowercase b. This is optional.

**Example:** *The information contains the following lines.*

1<sup>st</sup> American edition

The entry should look like the following entry:

250	1st American ed.
-----	------------------

## 260 - Imprint/Publication Information Tag – this tag and subfield a can not be repeated.

The imprint information lists the place of publication, publisher, and date(s) of publication. It can also contain information about distributors and places of distribution. This is a descriptive text field. Enter this information in the 260 field in the record. The date of publication should be separated from the publisher and place of publication by a pipe symbol (|) plus a lowercase c. It is important for the subfield c to mark the first date. Separate the publisher's name from the place of publication by using a pipe symbol (|) plus a lowercase b.

Subfield a – When place is unknown enter [s.l.]

Punctuation:

- ends with space colon ( :) when followed by subfield b
- ends with space semicolon ( ;) when followed by another a
- ends with comma (,) when it is followed by subfield c

Subfield b – When publisher/distributor is unknown enter [s.n.]

Punctuation:

- always preceded by a space and a colon ( :)
- ends with comma (,) when followed by subfield c
- ends with space colon ( :) when followed by another subfield b

Subfield c – Contains date of publication/distribution. If there is no date of publication but a copyright date is available, use the copyright date preceded by the letter “c” to identify it as a copyright date.

(Example: |cc1965.) If the date is unknown enter within brackets as much of the date as is known.

(Example: |c[19--?] |c[195-?])

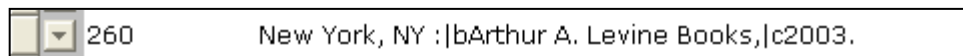
Punctuation:

- always preceded by a comma (,)
- ends with a period (.)

**Example:** *The catalog card contains the following line.*

New York, NY : Arthur A. Levine Books, c2003.

The entry should look like the following entry:



## Physical Description Tags

### 300 - Tag for Collation

The collation lists the number of volumes or pages, notes the presence of illustrations, lists the size of the item in centimeters, and notes any accompanying material. This field is considered a descriptive text field even though it contains information not transcribed from the title page, but derived from the piece itself. Enter this information in the 300 field in the record. Separate the physical details ("illus., ports.") from the number of pages by using a pipe symbol (|) plus a lowercase letter b. Separate the dimensions from the physical details of pages by using a pipe symbol plus a lowercase c.

Punctuation: This tag always ends with a mark of punctuation. If one is not part of the content ending the tag, provide a period.

Subfield a – Extent - Contains the number of pages and physical parts. Works that are not yet complete, only the type of unit designation is recorded, preceded by three spaces.

Punctuation:

- ends with space colon ( :) when it is followed by subfield b
- ends with space semicolon ( ;) when it is followed by subfield c
- ends with space plus sign ( +) when it is followed by subfield e

Subfield b – Other physical details

Punctuation:

- always preceded by a space and a colon ( : )
- ends with space semicolon (;) when followed by subfield c
- ends with space plus sign ( + ) when followed by subfield e

Subfield c – Dimensions

Punctuation;

- always preceded by space semicolon ( ; )
- ends with space plus sign ( + ) when followed by subfield e

Subfield e – Accompanying material – associated physical description statements are enclosed in parentheses.

Punctuation:

- always preceded by space plus sign ( + )

**Example:** *For the following information:*

xi, 870 p. illus., 24 cm.

The entry should look like the following entry:

300		xi, 870 p. : bill. ; c24 cm.
-----	--	------------------------------

## Series Transcription Tags

### 440 - Series

Enter the series in the 440 field when the title page transcription of the series name matches the library's standard heading form, and there is a single series for all items in the series. This field is both a descriptive text field and a heading field. Do not surround the 440 field with parentheses. If there is an individual series number associated with the item, separate the series number from the series title by using a pipe symbol (|) plus a lowercase v. Like the 245, the 440 field has a nonfiling indicator in the second indicator position.

440 – This tag can be repeated but subfield a may not be repeated within the tag. Subject to authority control.

1<sup>st</sup> indicator blank

2<sup>nd</sup> indicator – number of nonfiling characters for leading article

The = 4      A = 2      An = 3      Les = 4

Subfield a – enter the serried title exactly as it appears on the item

Subfield n – number of part of work

Subfield p – name or part of work

Subfield v – volume designation

Punctuation:

- tag does not end with mark of final punctuation unless field ends with abbreviation, an initial/letter, or other data needing mark of punctuation.
- Subfields n and p are preceded by a period (.).
- Subfield v is preceded by a space and a semicolon ( ;).
- no spaces used in initialisms or personal name initials/letters appearing as part of series title.

**Example:** *The information contains the following line.*

Ready-to-read, level 2  
Reading rainbow book

The entry should look like the following entry.

▼	440	0	Ready-to-read. plevel 2
▼	440	0	Reading rainbow book

## Tags for Notes

### 500 - General Notes

Enter any general note(s) in the 500 (General Note) field. This tag can be repeated but you may not repeat subfield a within the tag. The field ends with a period unless another mark of punctuation is present.

**Example:** *The information:*

"Year 5" – spine  
Sequel to Harry Potter and the goblet of fire.

The entry should look like the following entry:

▼	500		"Year 5"--Spine.
▼	500		Sequel to: Harry Potter and the goblet of fire.

### 504 - Bibliography Notes

If a note refers to specific pages where a bibliography is located in the item, enter this information in 504 field. This tag can be repeated, but you may not repeat subfield a within the tag.

Punctuation: Subfield a ends with a period unless another mark of punctuation is present.

**Example:** *for the following information:*

Includes bibliographical references, p. 115, index, glossary

The entry should look like the following entry:

▼	504		Includes bibliographical references (p. 115), index, and glossary.
---	-----	--	--



## 505 - Contents Notes

If a note (usually a whole paragraph of text) begins with the word "Contents," or lists subtitles or descriptions included in the work, enter this text in a 505 field.

505 – this tag can be repeated but you may not repeat subfield a within the tag.

1<sup>st</sup> indicator – type of contents note

- 0 Complete contents
- 1 Incomplete contents (the note is incomplete because all the parts haven't yet been published)
- 2 Partial contents (the note is incomplete because the cataloger hasn't filled it in yet; all the items of the set have been published)

2<sup>nd</sup> indicator – blank

Punctuation:

-space-hyphen-hyphen-space ( -- ) is entered between each item in the contents note. Contents notes may contain prescribed ISBD punctuation, e.g., statements of responsibility are preceded by a space-slash-space ( / ).

-the field ends with a period when the field contains complete or partial contents (1<sup>st</sup> indicator of 0 or 2) unless another mark of punctuation is present.

-if the field contains incomplete contents (1<sup>st</sup> indicator of 1) no period is used unless the last word, initial/letter, or abbreviation ends in a period.

**Example:** *for the following information:*

Title "The wind's twelve quarters – short stories" by Ursula LeGuin

The entry should look like the following entry.

▼	505	0	Semley's necklace -- April in Paris -- The masters -- Darness box -- The word of unbinding -- The rule of names -- Winter's king -- The good trip -- Nine lives -- Things -- A trip to the heap -- Vaster than empires and more slow -- The stars below -- The field of vision -- Direction of the road -- The ones who walk away from Omelas -- The day before the revolution.
---	-----	---	---

## 520 - Abstract/Summary Notes

If a note (usually a whole paragraph of text) begins with the word "Summary," and briefly describes the scope of the work or gives a plot outline, then enter this text in a 520 field. Do not enter the word "Summary" as part of the 520 field.

520 – this tag can be repeated but you may not repeat subfield a within the tag.

1<sup>st</sup> indicator – blank

2<sup>nd</sup> indicator – blank

Punctuation – ends with a period unless another mark of punctuation is present.

**Example:** *Summary tag:*

The entry should look like the following entry.

520	When the government of the magic world and authorities at Hogwarts School of Witchcraft and Wizardry refuse to believe in the growing threat of freshly revived Lord Voldemort, fifteen-year-old Harry Potter finds support from his loyal friends in facing the evil wizard and other new terrors.
-----	---

## 521 – Target audience

This tag can be repeated but you may not repeat subfield b within the tag.

1<sup>st</sup> indicator

0 Reading level

1 Interest age level

2 Interest grade level

3 Special audience characteristics

2<sup>nd</sup> indicator blank

Subfield a – Target audience note (may be repeated)

Subfield b – Source (may not be repeated)

Punctuation – ends with a period unless other punctuation is present.

**Example:** *Target audience tag w/ Reading level and Interest age level:*

521	0	6.9	
521	1	008-016.	bBTSB.

## 526 – Study Program Information Note

This tag can be repeated but you may not repeat subfields within the tag.

1<sup>st</sup> indicator

0 Reading program

8 No display constant generated

Punctuation – ends with a period unless another punctuation mark is present.

Subfield a – Program name

Subfield b – Interest level

Subfield c – Reading level

Subfield d – Title point value

Subfield z – Test or quiz number

Subfield 5 – Building code for test holdings

**Example:** of Reading program entry:

526	0	Accelerated Reader AR bMG c7.2 d44.0 z69785
-----	---	---

**Example:** of Reading program entry, *library owns test*

526	0	Reading Counts! b880 c5.3 d16 zQ13011 5DLHS
-----	---	---

## 586 – Award note

This tag can be repeated but you may not repeat subfield a within the tag.

Punctuation – does not end with a mark of punctuation unless other data ends with a mark of punctuation.

**Example:** Award note entries:

586	Newbery Medal/Honor, 2000
586	Coretta Scott King Award, 2000

## 6XX - Subject Tracing Tags

### 600 - Personal Subject Heading

If a work is about a person, then a person's name is a subject heading. Enter this information in a 600 (Personal Name Subject) field.

This tag can be repeated.

1<sup>st</sup> indicator

- 0 Forename
- 1 Surname
- 3 Family Name

2<sup>nd</sup> indicator

- 4 Source not specified

Appropriate subfields:

- a – Personal name (subfield cannot be repeated within the tag)
- d – Dates associated with a name (subfield cannot be repeated within the tag)
- v – For subdivision designates a specific kind or genre of material such as “Fiction” (subfield may be repeated)
- x – General subdivision (subfield may be repeated)
- y – Chronological subdivision (subfield may be repeated)
- z – Geographic subdivision (subfield may be repeated)

**Example:** entry, person as subject:

600	17	Twain, Mark, d1935-1910. 2sears
-----	----	---------------------------------

## 650 - Topical Subject Heading

Tag can be repeated.

If a work is about a topic, then a topical term or group of terms will be a subject heading.

1<sup>st</sup> indicator will generally be blank

2<sup>nd</sup> indicator

4 Source not specified

Appropriate subfields:

a – Topical term (subfield cannot be repeated within the tag)

v – For subdivision designates specific kind or genre of material such as “Fiction” (subfield may be repeated)

x – General subdivision (subfield may be repeated)

y – Chronological subdivision (subfield may be repeated)

z – Geographic subdivision (subfield may be repeated)

**Example:** *Topical subject headings:*

▼	650	7	Potter, Harry (Fictitious character) vFiction. 2sears
▼	650	7	Hogwarts School of Witchcraft and Wizardry (Imaginary place) vFiction. 2sears
▼	650	7	Wizards xFiction. 2sears
▼	650	7	Magic xFiction. 2sears
▼	650	7	School stories. 2sears

## 651 - Geographic Subject Heading

Tag can be repeated.

1<sup>st</sup> indicator – blank

2<sup>nd</sup> indicator

4 Source not specified

Appropriate subfields:

a – Geographic name (subfield cannot be repeated within the tag)

v- Form subdivision designates specific kind or genre of material such as “Fiction” (subfield may be repeated)

x – General subdivision (subfield may be repeated)

y – Chronological subdivision (subfield may be repeated)

z – Geographic subdivision (subfield may be repeated)

**Example:** *geographic subject heading:*

▼	651	7	England xFiction. 2sears
---	-----	---	--------------------------

## 658 – Aligned to standards

This field can be repeated.

- 1<sup>st</sup> indicator blank
- 2<sup>nd</sup> indicator blank

Cut and paste tag content from INFOhio web site. <http://www.infohio.org/librarystaff/odeosic/>  
Be sure to add subfield 2 or subfield 3 per instructions.

**Example:** *standards alignment tag:*

658	Pre-Kindergarten Mathematics. Number, Number Sense and Operations\$b Count, using numerals and ordinal numbers\$bNumber and Number Systems\$b Touch objects and say the number names when counting in the context of daily activities and play\$cY2003 CMA S01 GPK-02 BF LPK I02. 2ohco 3Infohio OBgNWOET
-----	---

## 7XX - Added Author Tracing Tags

Enter secondary creators or contributors to the production of a book in these fields according to the nature of their contribution. There is no limit to the number of added author fields used to describe an item

Punctuation – tag will end with a period

## 700 – Personal Name (may choose to use this tag for joint authors or contributors)

- 1<sup>st</sup> indicator
  - 0 Forename
  - 1 Surname
- 2<sup>nd</sup> indicator (Can be left blank)
  - 2 Analytical entry
- Subfield a – Personal name (subfield may not be repeated within tag)

**Example:** *700 tag entries:*

700	1	Prelutsky, Jack.
700	1	Smith, Lane, eill.

## 730 - Uniform Title

If a book has a primary creator and a standard title, but contains material from a title without a primary creator universally known by a particular form of name, then the item is described with a special added title field called the 730.

Tag can be repeated

1<sup>st</sup> indicator – number of non-filing characters for leading article

The = 4      A = 2      An = 3      Les = 4

2<sup>nd</sup> indicator – can be left blank

3 Analytical entry

Subfield a – Uniform title (subfield may not be repeated within the tag)

Tags for Series Traced Differently

A tag in the 800 group is only used if a 490 field is already present. The basic information in the two tags is the same: information about the individual item's series. The difference is the series information in the 490 field is transcribed from the piece, but the information in the 8XX field is reformatted to the library's specifications for that series heading.

## 800 – Series Added Entry – Personal Name

Tag can be repeated.

When the title page transcription of the series name does not match the library's standard heading form, and there is a single personal author responsible for all items in the series, then the series is entered in the 490 field, and the traced series is entered in the 800 field. The 800 field is a heading field.

1<sup>st</sup> indicator

0 Forename

1 Surname

3 Family name

2<sup>nd</sup> indicator – blank

Subfield a – Personal name (subfield cannot be repeated within the tag)

Subfield t – Title (subfield cannot be repeated within the tag)

**Example:** 800 tag entry:

▼	800	1	Stine, R. L. tFear Street super chiller.
---	-----	---	--

## 810 – Series Added Entry – Corporate Name

Tag can be repeated.

When the title page transcription of the series name does not match the library's standard heading form, and there is a society, institution, or other permanent group responsible for all items in the series, then enter the series in the 490 field, and enter the traced series in the 810 field.

1<sup>st</sup> indicator

- 0 Inverted name
- 1 Jurisdiction name
- 3 Name in direct order

2<sup>nd</sup> indicator blank

Subfield a – Corporate name (subfield cannot be repeated)

Subfield t – Title (subfield cannot be repeated)

## 811 – Series Added Entry – Meeting Name

Tag can be repeated.

1<sup>st</sup> indicator

- 0 Inverted name
- 1 Jurisdiction name
- 3 Name in direct order

2<sup>nd</sup> indicator blank

Subfield a – Meeting name (subfield cannot be repeated)

Subfield t – Title (subfield cannot be repeated)

## 830 - Uniform Title

Tag can be repeated.

When the title page transcription of the series name does not match the library's standard heading form, and there no single entity responsible for all items in the series, enter the series in the 490 field, and enter the traced series in the 830 field.

1<sup>st</sup> indicator blank

2<sup>nd</sup> indicator – number of non-filing characters for leading article

The = 4      A = 2      An = 3      Les = 4

(Common practice is to omit initial articles in an 830 tag. Thus second indicator values are not needed).

Subfield a – Uniform title (subfield may not be repeated within the tag)

Subfield n – Number of part/section of a work (subfield may be repeated)

Subfield p – Name of part/section of a work (subfield may be repeated)

Subfield v – Volume/sequential designation (subfield may not be repeated)

Punctuation – when creating a single entry, end the field with a period (.)

## **Fixed Fields**

These fixed field instructions assume that your cataloging software provides a list of codes from which to select for fixed fields.

### **Leader:.**

**008** The codes for the 008 tag are listed below. **Edit as indicated in bold.**

Date:	030711	<This date must be replaced with the current date. Enter as YYMMDD.
Date type:	s	
Date 1:		<Enter the first date following \$c in the 260 tag. If it is an estimated date, replace the unknown digits with the letter 'u.' Example: 19uu
Date 2		
Place:		<For US publications enter two-character abbreviation for state followed by "u". Example: ohu for Ohio.
Lang:	eng	<Edit if not English.
Mod rec:		
Source:	d	
Illus:		no illustrations <Edit if appropriate.
Audience:		<Enter appropriate level.
Form/item:		<Edit if other than the usual print format.
Cont:		<May select up to four content types.
Govt pub:		not a government publication <Edit if appropriate.
Conf pub:	0	not a conference publication <Edit if appropriate.
Festschrift:	0	
Index:	0	no index < Edit if appropriate.
Lit. form:		<Enter appropriate literary form.
Biog:		<If includes biographical information, enter appropriate code.

**Protected fields** – not overlaid when record is overlaid:

505  
521  
526  
590  
593  
594  
595  
597  
598  
599  
658  
690  
691  
856

**Note:** For more detailed information or specific questions, use **HELP** wizard.



## Guidelines for Derived Cataloging

Derived cataloging is the process of taking a MARC record and modifying it to represent an item different than the item the MARC record originally represented. This results in an originally cataloged item with a minimum of keystrokes. However, INFOhio recommends the use of the Cataloging Templates for original cataloging so that all new records conform to current cataloging standards. These derived cataloging guidelines are being provided **for these examples:**

- **Equipment record if creating separate bib records for each item. (See SirsiDynix Java Manual)**
- Same intellectual content published in a different format (e.g., a sound filmstrip distributed as a still video; VHS distributed on a DVD).
- Necessity of creating original cataloging records for several titles from the same publisher and/or series that differ in a limited way. Perhaps only the title is different, as in the case of some beginning reading readers.
- Same intellectual content published by a different publisher with a different publication date.
- Same intellectual content first published in-house as a handbook is re-published for mass market.

See <http://cweb.loc.gov/marc/bibliographic> or <http://www.oclc.org/bibformats> for a description of unknown tags, indicators or subfields.

## Required Modifications to Fixed Fields

A fill character ( | ) in the Leader or mandatory 007 and 008 elements should be replaced with appropriate data. Many cataloging templates will provide prompts and a list for each data element in the Leader, 006, 007 and 008 tags. Consult the above Web sites, if yours does not.

### LEADER:

**Record Status:** n

**Type of Record:** *If type of record is different, derived cataloging is discouraged.*

**Bibliographic Level:** *Verify.*

**Encoding Level:** *Verify; modify as appropriate.*

**006 Additional Material Characteristics:** *Verify all elements present; modify as appropriate. Remove if no additional materials are part of the publication. Don't remove just because they may be missing.*

**007 Physical Description of non-print:** *Verify all elements present; modify as appropriate. **007 and the first data element for category or type of material must be present for all non-print materials.** NOTE: See page 3 for video formats (VHS, DVD, laser, streaming), sound recordings (LP, cassette, CD) and books (large print, brail, eBook).*

### 008 General Information

**Date Entered:** *Enter **current date** formatted yymmdd (e.g., 980101).*

**Date Status:** *Verify; modify as appropriate.*

**Date 1:** *Verify; modify as appropriate.*

**Date 2:** *Verify; modify as appropriate.*

**Place of Publication:** *Verify; modify as appropriate.*

**Media specific elements:** *Verify each one; modify as appropriate.*

**Language:** *Verify; modify as appropriate.*

**Cataloging Source: d**

The INFOhio mandatory 008 elements are identified in the table below. Java Workflows will display elements if editing this field. A dropdown box at the display of each element will reveal a list from which to choose. Verify any and all elements of the 008 tag.

ALL MATERIALS <b>Date type:</b> <b>Date 1:</b> <b>Lang:</b>	
BOOKS <b>Lit text:</b>	Nonfiction = 0 Fiction = 1
NON-PRINT <b>Type of mat</b> (if not a book):	

**Required Modifications to Control Fields**

**NOTE:** *Sirsi Workflows does not currently allow these fields to be deleted but this problem is being addressed.*

- 001 Control Number:** *Remove.*
- 003 Source of Control Number:** *Remove.*
- 005 Date and time of last transaction:** *Remove.*

**Required Modifications to Variable Fields**

- 010 LCCN:** *If present in record, remove tag OR if present on item, replace content with new LCCN in subfield "a" according to the specifications of your cataloging software.*
- 020 ISBN:** *If present in record, remove tag OR if present in item, replace content with new ISBN in subfield "a."*
- 040 Cataloging Source:** *Replace all subfields and data with your district LC/NUC code in subfield "a" and subfield "c."*  
Example: OLmlUC\$cOLmlUC

**0XX All other Standard Number Fields:** *Verify or remove.*

**1XX through 9XX tags:** *Verify ALL tags and modify appropriately.* Pay particular attention to the following tags that the content matches the item in hand:

- 1XX |a (Author main entry. It is possible the content may not match the item in hand if content is an authorized heading. Match on the statement of responsibility in 245 |c.)
- 245 |a (Title) |h (Medium) |b (Remainder of title) |c (Statement of Responsibility)
- 250 |a (Edition/Version)
- 260 |a (Place of Publication) |b (Publisher) |c (Publication Date)
- 300 |a (Physical description)
- 440 |a (Series)
- 5XX (Notes)
- 6XX (Subject headings)
- 7XX (Added entries)
- 8XX (Series added entries)

See next pages for examples of specific edits to make for format changes within the same Record Type. i.e., videorecording in a different carrier, VHS now on DVD.

**Video recordings in common formats:**

Fixed field	Position	Label	VHS code	DVD code	Laser disc code	Streaming code
Leader	06	Record type	g			
	05	Record status	n			
007	00	Category	v			
	01	Specific material designation	f	d	d	z
	04	Format	b	v	g	z
	05	Sound on medium	a	a	a	a
	06	Medium for sound	h	i	i	z
	07	Dimensions	o	z	z	z
	08	Playback channel	m = monaural q = quadrasonic, multichannel s = stereophonic u = unknown			
008	00-05	Date entered	Current date entered as YYMMDD			
	06	Type of date	s			
	07-10	Date 1	Enter year of publication <i>See template instructions for entering unknown dates</i>			
	15-17	Place of pub	Verify, edit if needed			
	29	Form				s
	33	Type of visual	v			
	34	Technique	a = animation c = animation & live action l = live action			
<b>Variable field</b>	<b>Indicators</b>					
020		ISBN	<i>If present, remove or replace</i>			
024	See Java pull down for indicators	Other standard number	<i>If present, remove or replace</i>			
260		Publication	Evaluate, Date must match Date 1 in 008 tag			
300		Physical desc	videocassette	DVD	videodisc	<i>Remove tag</i>
538		System details	VHS	DVD	Laser disc	<i>Program needed to view video</i>
856		Electronic locati				<i>See template instructions</i>

**Audio recordings in common formats:**

Fixed field	Position	Label	LP code	Cassette code	CD code
Leader	06	Record type	i = nonmusical j = musical		
	05	Record status	n		
007	00	Category	s		
	01	Specific material designation	d	s	z
	03	Speed	b = 33 1/3 rpm c = 45 rpm	l	z
	04	Playback channels	m = monaural q = quadrasonic, multichannel s = stereophonic u = unknown		
	05	Groove width	m	n	n
	06	Dimensions	e = 12 in.	j	g
	07	Tape width	n	l	n
	08	Tape config	n	c	n
	09	Kind of disc, cylinder tape	m		
	10	Kind of material	p		
	11	Kind of cutting	(pipe)	n	n
	12	Special playback	(pipe)		
	13	Capture & storage	(pipe)		
008	00-05	Date entered	Current date entered as YYMMDD		
	06	Type of date	s		
	07-10	Date 1	Enter year of publication <i>See template instructions for entering unknown dates</i>		
	15-17	Place of pub	Verify, edit if needed		
<b>Variable field</b>	<b>Indicators</b>				
020		ISBN	If present, remove or replace		
024	See Java pull down for indicators	Other standard number	If present, remove or replace		
260		Publication	Evaluate, Date must match Date 1 in 008 tag		
300		Physical desc	LP	Audio cassette	CD

**Print materials in common formats:**

Fixed field	Position	Label	Book code	Large print code	Braille code	eBook code
Leader	06	Record type	a			
	05	Record status	n			
007	00	Category	t			
	01	Specific material designation	a	b	c	z
008	00-05	Date entered	Current date entered as YYMMDD			
	06	Type of date	s			
	07-10	Date 1	Enter year of publication <i>See template instructions for entering unknown dates</i>			
	15-17	Place of pub	Verify, edit if needed			
	18-21	Illustrations	Evaluate and use Java pull downs for codes			
	23	Form of item		d	f	s
	31	Index	0 = No 1 = Yes   (pipe) = no attempt to code			
<b>Variable field</b>	<b>Indicators</b>					
020		ISBN	<i>If present, remove or replace</i>			
260		Publication	Evaluate, Date must match Date 1 in 008 tag			
300		Physical desc	pages	pages	<i>Add appropriate term for the tactile system to the number of pages, leaves, or volumes</i>	<i>Remove tag</i>
538		System details				<i>Computer specifications for access</i>
856		Electronic location				<i>See template instructions</i>

## Guidelines for Enhancing MARC Records

These guidelines are intended to help you enhance an existing MARC record or correct errors.

These guidelines are NOT intended for:

- original cataloging
- modifications which result in a NEW bibliographic record (i.e., you determine that the item in hand does not match an existing bibliographic record but only a couple modifications would create the needed record). Perhaps the item differs only in edition, date and pagination. Since such changes result in a new bibliographic record, additional changes to control fields must also be made. Those are addressed in *Guidelines for Derived Cataloging*. Therefore do NOT make such modifications without consulting that document.

IF MODIFYING a MARC record:

- Add \$d with your LC/NUC code \_\_\_\_\_ to the 040 tag.  
If you do not know your code, it can be found at  
<http://lcweb.loc.gov/marc/organizations/>  
<http://www.infohio.org/UC/LOCcodes.html> << Contains search instructions
- If there is no 040 tag, enter your code in \$a of the 040.

### Modifications and/or Enhancements to Fixed Fields

A fill character ( | ) in the Leader or mandatory 007 & 008 elements should be replaced with appropriate data. MultiLIS will provide prompts and a list for each data element in the Leader, 007 and 008 tags.

The 007 field is for nonprint material. The first data element "Material Type" is an INFOhio mandatory field when applicable. MultiLIS will prompt for this if adding or editing this field. The select key will display a list of material types from which to choose.

The INFOhio mandatory 008 elements are identified in the table below. MultiLIS will prompt for elements if editing this field. The select key at the display of each element will reveal a list from which to choose.

ALL MATERIALS <b>Date type:</b> <b>Date 1:</b> <b>Lang:</b>	(If date type and/or date 1 are missing, see "Guidelines for Derived Cataloging")
BOOKS <b>Lit text:</b> <b>Biog:</b>	Nonfiction = 0 Fiction = 1 (Blank indicates no biographical material)
NONPRINT <b>Type of mat (if not a book):</b>	

## Guidelines for Making Common Enhancements

### **020 International Standard Book Number [ISBN] (Repeatable)**

- This tag and subfield “z” may be repeated.
- Subfields “a” and “c” may NOT be repeated.

1st indicator---      Ⓟ blank  
2nd indicator --      Ⓟ blank

\$a International Standard Book Number (NR)  
\$c Terms of availability (price) (NR)  
\$z Canceled/invalid ISBN (R)

020      \$a 0880114444  
020      \$a 083214493X (pbk.)  
020      \$a 0823948581 \$c \$\$12.50  
020      \$a 9780533801811

### **505 Formatted contents note (Repeatable)**

- This tag is searched in a title search
- This tag is used for indicating the contents of an item. It is often used for listing the individual titles of individual filmstrips contained in a single kit or to list titles contained within a book such as an anthology.
- This tag may be used to list individual titles in a multi volume set.
- MultiLIS has a 1,000 character limit for each field. Therefore each time the content in this tag exceeds about 14 lines an additional tag must be created for the additional information.
- This tag has two indicator positions

1st indicator -- type of contents note  
0 Complete contents  
1 Incomplete contents (The note is incomplete because all the parts haven't yet been published.)  
2 Partial contents (The note is incomplete because the cataloger hasn't filled it in yet; all the items of the set have been published.)  
8 No print constant provided  
2nd indicator -- level of detail  
Ⓟ Basic  
0 Enhanced

\$a Formatted contents note [Basic, second indicator must be blank] (NR)  
\$g Miscellaneous information [Enhanced, second indicator must be zero] (R)  
\$r Statement of responsibility [Enhanced, second indicator must be zero] (R)  
\$t Title [Enhanced, second indicator must be zero] (R)

According to AACR2 a space-hyphen-hyphen-space ( -- ) is entered between each item in the contents note unless a delimiter/subfield code follows in which case there is no ending space. Contents notes may contain prescribed ISBD punctuation, e.g., statements of responsibility are preceded by a space-slash-space ( / ). Title searches automatically search the 505 tag. Entering ISBD punctuation will exclude from a title search an author following ( / ). For example, a title search on “Lion King” could retrieve titles with only the word “Lion” if a 505 tag contains an author with the name King and the ISBD punctuation ( / ) is not used to indicate King is an author.

505 0 \$av. 1. 1900-1945 -- v. 2. 1945-1996.  
 505 1 \$ano. 1. Cataloging -- no. 2. Reference -- no. 3. Circulation.  
 505 0 \$a1. Addition (33fr.) -- 2. Subtraction (44 fr.) -- 3. Multiplication (48 fr.).  
 505 1 \$aOn my way to school / by Jim Smith -- It happened one time at lunch / by  
 Angela Dime -- The day it snowed / by Laura Wilson.  
 505 20 \$tBaptisms, 1816-1872 --\$tChurch members, 1816-1831 --\$tHistory of the Second  
 Presbyterian Church of West Durham / \$rby L. H. Fellows.

- The author is not searchable in an author search. To make the author searchable, create a 700 tag. 700 1 \$aDime, Angela. \$tit happened one time at lunch.

### **510 Citation/Reference Note (Repeatable)**

1st indicator -- Coverage/location in source

0 Coverage unknown  
 1 Coverage complete  
 2 Coverage is selective  
 3 Location in source not given  
 4 Location in source given

2nd indicator -- ~~h~~ blank

\$a Name of source (NR)  
 \$b Dates of coverage of source (NR)  
 \$c Location within source (NR)

#### Punctuation:

- A comma is placed at the end of subfield a, b, c if another subfield follows.
- Field 510 ends with a hyphen if one is present at the end of subfield b; otherwise the field does not end with a mark of punctuation, unless the field ends with an abbreviation, initial/letter, or other data that ends with a mark of punctuation.

510 1~~h~~ \$aEducation index,\$b1966-

510 2~~h~~ \$aMoving Picture world,\$b1975-

### **520 Summary, etc. note (Repeatable)**

- Use this tag for annotations and summaries. It may be repeated; the subfield may NOT be repeated.

1st indicator -- display constant controller

~~h~~ No information provided (displays as Summary: )  
 0 Subject (displays as Subject: )  
 1 Review  
 8 No display constant generated

2nd indicator -- ~~h~~ blank

\$a Summary, etc. note (NR)

520 \$aA misinformed boy discovers that the keys to unlocking knowledge are located in his school library.



**521 Target audience note (Repeatable)**

- Note that the indicators are **very** important. They indicate the value contained in subfield "a."
- This tag is repeatable but the subfields are not.
- If creating a 521 tag for the Fountas and Pinnell Leveled titles, be sure to identify that program in subfield \$b per the example below. (\$bFountas and Pinnell Leveled Books)
- For interest levels INFOhio recommends the following as the most universally used.  
K-3; 3-6; 5-8; 7-10; 9-12

1st indicator -- display constant controller

- ␣ No information provided
- 0 Reading grade level
- 1 Interest age level
- 2 Interest grade level
- 3 Special audience characteristics
- 4 Motivation/interest level
- 8 No display constant generated

2nd indicator ␣ blank

- \$a Target audience note (NR)
- \$b Source (NR)

- 521 3 \$aVision impaired.
- 521 0 \$a2
- 521 2 \$a7-10
- 521 8 \$aFor remedial reading programs
- 521 8 \$aK\$bFountas and Pinnell Leveled Books
- 521 8 \$a720\$bLexile

**526 Study Program Information Note (Repeatable)**

1st indicator

- 0 Reading program
- 8 No display constant generated

2nd indicator

- ␣ Undefined

- \$a Program name (NR)
- \$b Interest level (NR)
- \$c Reading level (NR)
- \$d Title point value (NR)
- \$5 Institution to which field applies (NR) *MultiLIS users enter general location code.*

- 526 0 \$aAccelerated Reader/Advantage Learning Systems\$b5.0\$c4.0\$d75\$5LHS
- 526 0 \$aAccelerated Readers\$c6.5\$d2\$5BHS

**586 Awards Note (Repeatable)**

1st indicator

- ␣ No information provided
- 8 No display constant generated

2nd indicator

- ␣ Undefined

- \$a Award (NR)
- 586 \$aAcademy award for best picture, 1987
- 586 \$aCaldecott Medal, 1979

**700 Added entry -- Personal name (Repeatable)**

- Use a 700 tag to access the author, which may have been added to the 505 formatted contents note so that the author would display in the contents note at the OPAC.
- The tag and subfield “e” may be repeated; the other subfields may NOT be repeated.

1st indicator -- type of personal name entry element

0 Forename  
1 Single surname

3 Family name

2nd indicator -- type of added entry

b No information provided

2 Analytical entry

\$a Personal name (NR)

\$b Numeration (NR)

\$c Titles and other words associated with a name (R)

\$d Dates associated with a name (NR)

\$e Relator term (e.g., ed. or comp.) (R)

\$q Fuller form of name (NR)

\$t Title of a work (NR)

700 1 \$aWilson, Katie, \$e ed.

700 12 \$aShakespeare, William, \$d 1564-1616. \$tHamlet.

**856 Electronic Location and Access (Repeatable)**

INFOhio neither encourages nor discourages the creation of bibliographic records for Web sites. The following instructions are abridged and are provided to aid those who wish to create such records. Records for Web sites **may** not be exported to the INFOhio Union Catalog due to the inability of INFOhio to validate sites should the content change. *NOTE: 856 tags in records for traditional resources **may not be** retained in the bibliographic record when it is imported to the INFOhio Union Catalog.*

- This field may be used in a bibliographic record for a resource when that resource or a subset of it is available electronically.
- It may also be used to locate and access an electronic version of a non-electronic resource described in the bibliographic record or a related electronic resource.
- Field 856 is repeated when the location data elements vary (the URL in subfield \$u or subfields \$a, \$b, \$d when used). It is also repeated when more than one access method is used, different portions of the item are available electronically, mirror sites are recorded, different formats/resolutions with different URLs are indicated, and related items are recorded.

1st indicator – Access method

b No information provided

4 http

7 Method specified in subfield \$2

2nd indicator -- Relationship

- ⊖ No information provided
- 0 Resource
- 1 Version of resource
- 2 Related resource
- 8 No display constant generated

\$a Host name (R)

**\$u Uniform Resource Locator (NR)**

**\$y Link text (R)**

Text that will **display** in place of the URL and will link to the site entered in \$u.

\$z Public note (R)

Optional. Use if needed. See example.

**\$2 Access method (NR)**

The access method when the first indicator position contains value 7.

**\$3 Materials specified (NR)**

Specified the part of the bibliographic item to which the field applies.

**EXAMPLES:**

856 41 **\$u**<http://www.jstor.org/journals/0277903x.html>

856 42 **\$3**Finding aid **\$u**<http://www.cgiar.org/ifpri/reports/0297rpt/0297-fr.htm>

856 40 **\$u**<http://jefferson.village.virginia.edu/pmc/contents.all.html>

856 40 **\$u**<http://muse.jhu.edu/journals/> **\$z**For subscribers only; follow links to resource

856 4 **\$u**<http://susdl.fcla.edu/cgi-bin/cgiwrap/~fdl/fdlcgi?FA00000011%2Fpdf> **\$y**Electronic resource (PDF)

856 40 **\$** **u**<http://www.ref.oclc.org:2000> **\$z**Address for accessing the journal using authorization number and password through OCLC FirstSearch Electronic Collections Online. Subscription to online journal required for access to abstracts and full text

**Sirsi K-12 Searching Strategies and Considerations**

<b>Boolean Operators</b>	<b>Workflows / CAT – CAT Jr.</b>
<p><b>AND</b> – locates records containing all specified terms</p>	<p>Using General search: <i>rocks <b>and</b> minerals</i> Will yield titles with the word <i>rocks</i> <b>and</b> the word <i>minerals</i> anywhere in any indexed field in the record.</p> <p>To search for phrase “rocks and minerals” enclose the words in double quotes.</p>
<p><b>NOT</b> – locates records containing the first search term but not second</p>	<p>Using General search: <i>science <b>not</b> fiction</i> Will yield titles with the word <i>science</i> but <b>not</b> the word <i>fiction</i> anywhere in any indexed field in the record.</p> <p>To phrase search, enclose in double quotes.</p>
<p><b>OR</b> – Locates records matching any or all of the specified terms</p>	<p>Using General search: <i>help <b>or</b> hindrance</i> Will yield titles with the word <i>help</i> <b>or</b> the word <i>hindrance</i> anywhere in any indexed field in the record.</p> <p>To phrase search, enclose in double quotes.</p>
<p><b>XOR</b> – locates records matching any one but not all of the specified terms</p>	<p>Using General Search: <i>science <b>xor</b> fiction</i> Will yield titles with the word <i>science</i> <b>or</b> the word <i>fiction</i> <b>but not both</b> words anywhere in any indexed field in the record.</p> <p>To phrase search, enclose in double quotes.</p>

Positional Operators	Workflows / CAT – CAT Jr.
<b>SAME</b> – Locates records in which a single MARC tag field contains all specified items	Using General search: <i>order same magic</i>  Will yield titles with the word <i>order</i> <b>and</b> the word <i>magic</i> as long as the <b>two are in the same</b> MARC field.
<b>WITH</b> - locates records in which field contains a phrase with all of the specified terms	TBD
<b>NEAR<math>n</math></b> – locates records in which field contains all search terms in no particular order	Using General search: <i>new NEAR2 berenstain</i>  Will yield titles with the word <i>new</i> <b>within 2 words</b> of the word <i>berenstain</i> in any MARC field.
<b>ADJ<math>n</math></b> – locates records in which field contains all search terms in order	Using General search: <i>small adj2 bear</i>  Will yield titles with the word <i>small</i> found at <b>within two words before</b> the word <i>bear</i> in any MARC field.
<b>NOTE:</b> $n$ indicates a number can be used for proximity searching.	

Relational Operators	Example Query	Example Result
< - Less than	WF: General - {pbyr}<1950	Titles with a publication year <b>less than</b> 1950
> - Greater than	WF: General – {pbyr}>2001	Titles with a publication year <b>greater than</b> 2001
= - Equal to	WF: General – {pbyr}=2003	Titles with a publication year <b>equal to</b> 2003
<> - Not equal to	WF: General – {pbyr}>1999 and {pbyr}<>2003	Titles published <b>after</b> 1999, but <b>does not include</b> titles published in 2003
<= - Less than or equal to	WF: General – {pbyr}<=1949	Titles published <b>in</b> 1949 or <b>earlier</b>
>= - Greater than or equal to	WF: General – {pbyr}>=2000	Titles published <b>in</b> 2000 or <b>after</b>

Special Characters used in Searches	Example Query	Example Result
"" <b>[double quotes]</b> – denotes a single phrase search which must match in the same adjacent order." <b>[single quotes]</b> – used by workflows	WF: Title – gold rush vs. 'gold rush'	Titles with the word "gold" and the word "rush" in the title fields vs. titles with the words "gold rush" in the title fields
( ) <b>[parentheses]</b> – allow search expressions to be grouped. The innermost set of parentheses is executed first.	WF: Subject - dogs or (DOG ADJ BREEDS)	Titles with subjects on dog breed or just dogs
{ } <b>[curly braces]</b> – allows you to search specific Sirsi entries which have been indexed.	WF: General - pumpkinhead {505}	Title "Nightmare hour"
? and \$ - ? allows for substitution of a single character, \$ allows for truncation of multiple characters.	WF: Title - cabin\$ Title – so?p	Titles with "cabin", "cabins", and "cabinet". Titles with "soap" and "soup".
<b>[space]</b> – must be used to separate numbers if they are to be searched separately.	WF: General – 32 10010 {readprog}	Looking for a value of 32 and also a value of 10010 in the reading program special tag. Titles for grade level 3.2 worth one point.
, <b>[comma]</b> - used to search numbers in their concatenated form, replaced by space in alphabetic search	WF: no example. Will search 1,2,3,4,5 as a single term Will search "dog, cat" as "dog cat"	
. <b>[period]</b> – replaced with a space in a search unless numeric, then assumed to be a decimal point	WF: no example. Will search "3.2" as a single term Will search "a.b" as "a b"	
- <b>[hyphen]</b> - to search with the hyphen included, same words without the hyphen will yield hyphenated words as well a non-hyphenated.	WF: General - hound-dog vs. hound dog	Records with "hound-dog" vs. records with "hound and dog" and "hound-dog".
' <b>[apostrophe]</b> - is ignored	WF: Title – don't vs dont	Yields same titles

Access Points (Search Index)	MARC Tags Searched
Author	100, 110, 111, 700, 710, 711, 720, 800, 810, 811
Curriculum Alignment	658
General	001, 010, 011, 013, 015, 016, 017, 018, 020, 022, 024, 025, 026, 027, 028, 030, 031, 035, 037, 038, 050, 060, 074, 082, 084, 086, 088, 090, 092, 099, 100, 110, 111, 130, 210, 211, 212, 214, 222, 240, 241, 242, 243, 245, 246, 247, 250, 254, 255, 258, 260, 261, 262, 265, 300, 305, 306, 310, 315, 321, 340, 349, 350, 355, 357, 362, 400, 410, 411, 440, 490, 500-508, 510, 511, 515, 520, 521, 526, 530, 533, 534, 538, 540, 545, 546, 547, 550, 555, 580, 586, 590, 591, 594, 595, 598, 600, 610, 611, 630, 648, 650, 651, 653, 654, 655, 656, 658, 657, 659, 662, 690, 691, 700, 705, 710, 711, 715, 720, 730, 740, 760, 762, 770, 772, 773, 777, 780, 785, 787, 800, 810, 811, 830, 840, 989, 990
Periodical	780, 785
Sel	594, 595 (indexed, but obsolete in both WF and Web2)
Reading Program	595 (from 526 contents)
Series	400, 410, 411, 440, 490, 830, 840
Subject	600, 610, 611, 630, 650, 651, 655, 690, 691
Title	130, 210, 245, 246, 247, 440, 505, 730, 740
Author Browse	100, 110, 111, 700, 705, 710, 711, 715, 720, 770, 772, 777, 780, 785, 787
Periodical Title Browse	780, 785, 787
Series Browse	400, 410, 411, 440, 490, 760, 800, 810, 811, 830, 840
Subject Browse	600, 610, 611, 630, 648, 650, 651, 655, 656, 658, 690, 691
Title Browse	130, 222, 240, 241, 242, 243, 245, 246, 247, 630, 730, 740

**Stopwords – these words are typically ignored during searching.**

A, AN, AS, AT, BE, BUT, BY, DO, FOR, IF, IN, IT, OF, ON, THE, TO

If a title is comprised of all stopwords, place double-quotes around the title for successful searching.

**Note: For more detailed information or specific questions, use HELP wizard.**

## Item Maintenance Introduction

### Title

A "title" represents a MARC or bibliographic record in the catalog.

### Call Number

In Sirsi K12, a call number is created for each school that owns a copy of the title. The call number includes the school and the call number that will be used for all copies added to this call number.

### Item

An item is the actual bar-coded item. All copies of a school's title that have the SAME CALL NUMBER will be added to the same call number.

If an ADDITIONAL COPY IS ADDED WITH A DIFFERENT CALL NUMBER (ex: using PB as prefix), a new call number must be added for that school and call number.

### EXAMPLE: Harry Potter and the sorcerer's stone – 1 bibliographic record

LMHS has 1 copy hardback and 2 copies paperback.

LMFM has 1 copy hardback.

LMIN has 1 copy hardback.

LMLB has 1 copy accelerated reader hardback.

LMSO has 1 copy hardback.

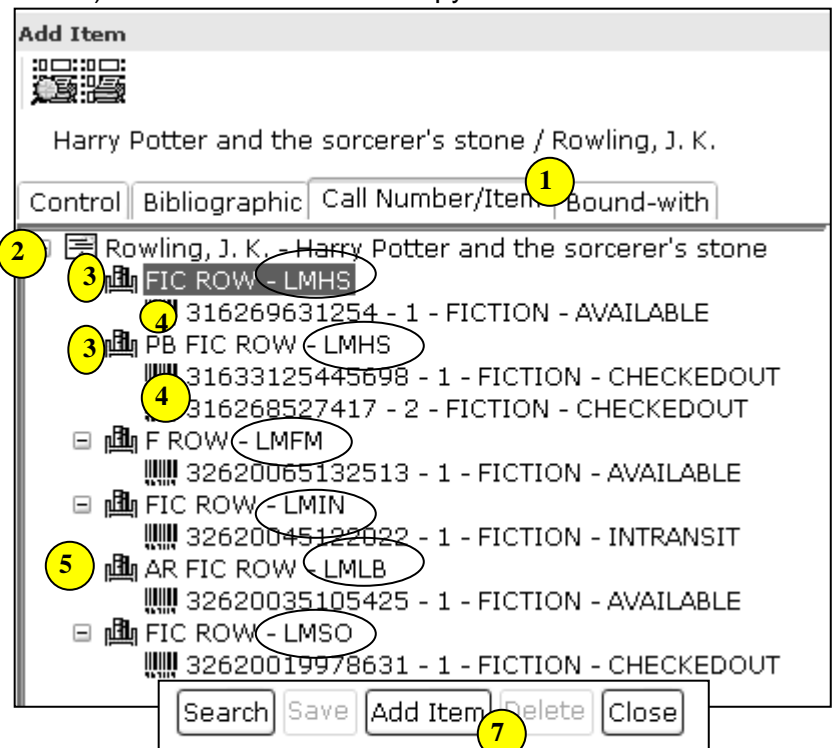
2 call number records for LMHS (PB FIC ROW) 2 copies (FIC ROW)	1 copy
1 call number record for LMFM hardback (F ROW)	1 copy
1 call number record for LMIN hardback (FIC ROW)	1 copy
1 call number record for LMLB accelerated reader (AR FIC ROW)	1 copy
1 call number record for LMSO hardback (FIC ROW)	1 copy

Sample Screen for Add Item.

1. Call Number/Item Tab
2. Title
3. Call Numbers at LMHS
4. Copies at LMHS
5. Call Number at LMLB

To Add Item to existing Call Number:

6. **Click** on Call Number (highlight).
7. **Click** on Add Item button.
8. **Click** Save button when finished.



**Note: For more detailed information or specific questions, use HELP wizard.**



**Title**

A “title” represents a MARC or bibliographic record in the catalog.

**Call Number**

In Sirsi K12, a call number is created for each school that owns a copy of the title. The call number includes the school and the call number that will be used for all copies built to this call number.

**Item**

An item is the actual barcoded item. All items of a school's title that have the SAME CALL NUMBER will be built to the same call number.

If an ADDITIONAL ITEM IS ADDED WITH A DIFFERENT CALL NUMBER (ex: using PB as prefix), a new call number must be added for that school and call number.

## 600 Technology & Applied Sciences

- 610 Medicine
- 620 Engineering
- 630 Agriculture
- 640 Home economics (cooking)
- 650 Management
- 660 Chemical engineering
- 670 Manufacturing
- 680 Manufacture for specific uses
- 690 Building



## 700 Arts, Sports, Recreation

- 710 Civic & landscape art
- 720 Architecture
- 730 Plastic arts (sculpture)
- 740 Drawing & decorative art
- 750 Painting
- 760 Graphic arts
- 770 Photography
- 780 Music
- 790 Recreation, performing arts, sports



## 800 Literature & Rhetoric

- 810 American
- 820 English & Old English
- 830 Germanic
- 840 French
- 850 Italian, Romanian
- 860 Spanish, Portuguese
- 870 Latin
- 880 Greek

- 890 Other literatures



## 900 Geography, History, Biography

- 910 Geography, travel
- 920 Biography, genealogy, insignia
- 930 Ancient world
- 940 Europe
- 950 Asia
- 960 Africa
- 970 North America
- 980 South America
- 990 Other areas



*How do we Dewey?*

Use the Dewey Decimal System to locate books of interest.

Ex. Looking for painters?

1. Find the 100's section that has your general topic of interest.  
700's = Arts
2. Narrow it down to a range of ten.  
750's = Painting
3. Go to the shelves and browse the 750s!!



## 000 Generalities



- 000 Technology (computers)
- 010 Bibliography
- 020 Library & information science
- 030 General encyclopedias
- 050 General serial publications
- 060 Organizations
- 070 Journalism, publishing, media
- 080 General collections
- 090 Manuscripts & rare books

## 100 Philosophy & Psychology

- 100 Philosophy
- 110 Metaphysics
- 120 Epistemology, causation, humankind
- 130 Paranormal phenomenon
- 140 Specific philosophical schools
- 150 Psychology
- 160 Logic
- 170 Ethics
- 180 Ancient, medieval, Oriental philosophy
- 190 Modern western philosophy



## 200 Religion



- 200 Religion
- 210 Philosophy & theory of religion
- 220 Bible
- 230 Christianity
- 240 Christian moral & devotional theology
- 250 Christian orders & local church
- 260 Social & ecclesiastical theology
- 270 History of Christianity & Christian sects
- 280 Christian denominations
- 290 Comparative religion & other religions

## 300 Social Sciences



- 310 Statistics
- 320 Political science
- 330 Economics
- 340 Law
- 350 Public administration & military science
- 360 Social programs & services
- 370 Education
- 380 Commerce
- 390 Customs, etiquette, folklore



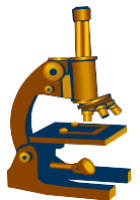
## 400 Language



- 410 Linguistics
- 420 English & Old English
- 430 Germanic
- 440 French
- 450 Italian, Romanian, Romanic
- 460 Spanish & Portuguese
- 470 Latin
- 480 Greek
- 490 Other languages

## 500 Natural Sciences & Math

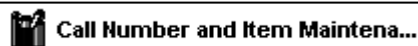
- 510 Math
- 520 Astronomy
- 530 Physics
- 540 Chemistry
- 550 Earth sciences
- 560 Paleontology
- 570 Life sciences
- 580 Plants
- 590 Animals



## Call Number and Item Maintenance

The Call Number and Item Maintenance Wizard guides you through the process of adding/editing a call number and adding/editing an item on an existing bibliographic record.

1. **Click** on Cataloging wizard group.
2. **Click** on Call Number and Item Maintenance Wizard.



3. **Search** for the title that matches your item.
4. If your search yields multiple results, a list of matching records displays in the hit list area. The selected title will display in the lower portion of the window with two tabs, Description and Call Number/Item. **Select** the title you want to review.

Call Number/Item Maint

Search for:

Index:

Library:

Current: Rowling, J. K. --- Harry Potter and the Order of the Phoenix --- FIC ROW RC 950 --- ID:32612050040173 --- Ctrl#:i9780439358064 --- Copy:1

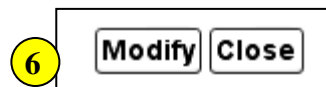
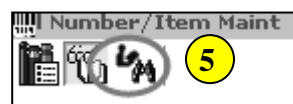
KEYWORD Title harry potter, ALL: 9 records

Title	Author	Pub. Info.	Phys. Desc.	Pub. Year	Library Copies
Harry Potter and the Chamber of Secrets	Rowling, J. K.	New York : Arthur A. Levine Books, 1999.	341 p. : ill. ; 24 cm.	1999	7
Harry Potter and the deathly hallows	Rowling, J. K.	New York : A.A. Levine, 2007.	759 p. : ill. ; 24 cm.	2007	6
Harry Potter and the goblet of fire	Rowling, J. K.	New York : Arthur A. Levine Books, 2000.	734 p. : ill. ; 24 cm.	2000	7
Harry Potter and the half-blood prince	Rowling, J. K.	New York : Arthur A. Levine, 2005.	x, 652 p. : ill. ; 24 cm.	2005	4
Harry Potter and the Order of the Phoenix	Rowling, J. K.	New York : A.A. Levine, 2003.	xi, 870 p. : ill. ; 24 cm.	2003	6
Harry Potter and the Order of the Phoenix	Rowling, J. K.	[England] : Pottermore, [2012]		2012	1
Harry Potter and the Prisoner of AZKABAN	Rowling, J. K.	New York : Levine, 1999	435 p.	1999	4
Harry Potter and the prisoner of Azkaban	Rowling, J. K.	New York : Scholastic Inc., [2001], c1999.	435 p. : ill. ; 20 cm.	2001	2
Harry Potter and the sorcerer's stone	Rowling, J. K.	New York : Scholastic Press, 1998.	vi, 309 p. : ill. ; 24 cm.	1998	3

Description | Call Number/Item

Leader am a0p  
key u23527  
key fol06016464

5. **Click** on the Call Number/Item tab to review specific item information. In multi-library systems, use **Change Display Library Helper** to select only YOUR library.



6. When you have selected the call number or item, **click** on the Modify button at the bottom of the screen.

Once you have selected the record you wish to modify, **follow the appropriate directions** below to add a call number, add an item, or edit either one.

## To Edit an existing call number

1. **Click** on the item number you want to modify.
2. **Make** any changes to the item record. See below for detailed instructions for each field.
3. **Click** on Save at the bottom of the screen.

Harry Potter and the chamber of secrets / Rowling, J. K.

Control Bibliographic Call Number/Item Bound-with

Harry Potter and the chamber of secrets - Rowling, J. K.

- FIC ROW - DLFN
- 32612000100069 - 1 - FICTION - AVAILABLE
- FIC ROW RC 940 - DLFN
- 32612015003407 - 1 - READPROGRM - MISSING - Car
- FIC ROW RC 940 - DLFN
- 32612000100044 - 1 - NONFICTION - AVAILABLE
- FIC ROW - DLMS
- 32612050040737 - 1 - FICTION - LOST-CLAIM
- 32612050040702 - 2 - NONFICTION - INTRANSIT
- 32612050040678 - 3 - NONFICTION - INTRANSIT
- FIC ROW - DLHS
- 32612100084270 - 1 - FICTION - INTRANSIT

Date created: 6/25/2008  
Date last charged: Never  
Date due: none  
Last discharged: Never  
Date inventoried: Never  
Times inventoried: 0  
Previous user ID:  
Last activity: Never  
In-house uses: 0

Call number information

Call number: FIC ROW Class scheme: ATDEWEYLOC  
Call library: DLFN Shelving key: FIC ROW ROW HA

Shadow call number

Item information

Item ID: 32612000100069 Number: 1  
Type: FICTION Item library: DLFN  
Shelf location: AVAILABLE Current status: AVAILABLE  
Material type: BOOK Funding source: BIRTHDAY  
Media desk: Number of pieces: 1  
Total checkouts: 0 Price: \$19.95  
 Permanent:  Circulate:  
 Shadow item

Extended information

Tag Contents  
CIRCNOTE  
PUBLIC Donated by Steve Coon  
STAFF

## To Add a New Call Number

**NOTE:** Add a Call Number if:

- there are no items on that record in your library.
- there are items in your library, but they have a different call number than you want for this item.

1. **Click** on the Title.
2. **Click** on Add Call Number button at the bottom of the screen.

Call Number/Item Maint

Harry Potter and the chamber of secrets / Rowling, J. K.

Control Bibliographic Call Number/Item Bound-with

Harry Potter and the chamber of secrets - Rowling, J. K.

- FIC ROW RC 940 - DLFN
- 32612015003407 - 1 - READPROGRM - MISSING - Can't
- FIC ROW - DLMS
- 32612050040737 - 1 - FICTION - LOST-CLAIM
- 32612050040702 - 2 - NONFICTION - INTRANSIT
- 32612050040678 - 3 - NONFICTION - INTRANSIT
- FIC ROW - DLHS
- 32612100084270 - 1 - FICTION - INTRANSIT
- FIC ROW - DLHS
- 32612001413257 - 1 - FICTION - AVAILABLE

Return to Search Save Add Call Number Add Item Delete Close

Library for New Call Number dialog box displays.

3. **Select** the library from the drop down box for the new call number, and then **click OK**.

Add Volume: Library for new call number

Library for new call number: DLFN OK Cancel

4. **Modify** the call number. If there are other items on the record, the system will display one of them. You may keep it as is or change it.

Leave Class scheme as ATDEWEYLOC and do not change the shelving key.

If you check Shadow Call Number, all items connected to that call number will be shadowed (hidden from view in the online catalog.)

Call number information

Call number: FIC ROW Class scheme: ATDEWEYLOC  
Call library: DLFN Shelving key: FIC ROW ROW HAR  
 Shadow call number

## To Add a New Item

**NOTE:** When you add a new call number, continue down the screen to add the item associated with it. You can also add an Item if there is already an item with the call number and library you need on the record.

### 5. Modify or Add Item Information

a. **Item ID** – you should select one of the following procedures to enter item IDs. Select the one method that works best for your school:

- Dumb barcodes – **scan or type** the barcode number. If you scan the barcode, the number will be saved to the record and appear on the left side of the screen. If barcode validation is turned on for your district, you will be able to type the barcode shortcut.
- Barcode Shortcut – If you are using this feature, you must have auto-generate barcodes turned off in properties. You will be able to type just the significant digits with an x. However, you will need to keep track of the significant digits.

Ex. 32612000100069 could be typed as 10006X

- Auto-generate barcodes – A new barcode number will automatically be generated. Check with your ITC to request this function be set up for your district. You also must have Auto-generate item ID checked in properties (Right click on the Add Item wizard > select properties > Behavior tab > check Auto–generate item id).

b. Other Item Information fields:

**Type:** Use the Drop Down menu to select the item group.

**Shelf Location:** Leave to default – Available

**Material Type:** Use the Drop Down menu to select the material type (the icon that will display in the online catalog).

**Media Desk** – leave blank

**Total Checkouts** – leave blank – the system generates this number.

**Copy Number** – system generated – do not change.

**Item Library** – your library should be there. If a different library appears, you have selected the wrong call number. Click Delete and go back to Step 5a

**Funding Source** – optional

**Number of pieces** - indicates the number of pieces associated with a particular item. If a value of two or more is entered in the number of pieces field, the Circulation wizards will require an override code to check out and check in the item to remind the library staff to check for number of pieces associated with this item.

**Price** - Enter Price

Permanent – leave checked

Circulate – leave checked




Shadow item – check if you do not want the item to appear in the online catalog.

6. **Extended Information** - if an item has a note in one of these fields, you will see a little post-it on the barcode icon in the result list.

**Circ Note** – appears when the item is checked in and checked out. Use for comments such as 10 copies in set, CD at desk, etc.

**Public** – enter any comments you want to appear in the online catalog such as Donated by the Smith Family.

**Staff** – enter any comments you want to appear only in Workflows such as PO # 1234.

Description	Call Num
Harry Potter and...	
FIC ROW - DL	
 326120001	
FIC ROW RC	
 326120150	
FIC ROW RC	
 326120001	

7. **Click Save** to save changes

Return to Search Save Add Item Delete Close

7

8. **Select** from options:

- Return to Search - Return to the search list to look up another title.
- Add Call Number - Add another call number to the same title.
- Add Item - Add another item to the call number you just added.
- Delete an item from this record.
- Close window.

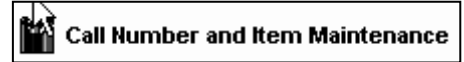
**NOTE:** *Closing the window before saving your changes will prompt you with the following message box. A response of “yes” saves any changes you have made, responding with “no” allows you to delete any modification you have made, and “cancel” allows you to resume modification of the item record.*



**Note: For more detailed information or specific questions, use HELP wizard**



**Click** on Call Number and Item Maintenance Wizard.



## To Edit an existing call number or item

1. **Click** on the item number you want to modify.
2. **Make** any changes to the item record or call number. See below for detailed instructions for each field.
3. **Click** on Save at the bottom of the screen.

Harry Potter and the chamber of secrets / Rowling, J. K.

Control | Bibliographic | Call Number/Item | Bound-with

Harry Potter and the chamber of secrets - Rowling, J. K.

- FIC ROW - DLFN
  - 32612000100069 - 1 - FICTION - AVAILABLE **1**
  - FIC ROW RC 940 - DLFN
    - 32612015003407 - 1 - READPROG M - MISSING - Car
    - FIC ROW RC 940 - DLFN
    - 32612000100044 - 1 - NONFICTION - AVAILABLE
  - FIC ROW - DLMS
    - 32612050040737 - 1 - FICTION - LOST-CLAIM
    - 32612050040702 - 2 - NONFICTION - INTRANSIT
    - 32612050040678 - 3 - NONFICTION - INTRANSIT
  - FIC ROW - DLHS
    - 32612100084270 - 1 - FICTION - INTRANSIT

Date created: 6/25/2008  
Date last charged: Never  
Date due: none  
Last discharged: Never  
Date inventoried: Never  
Times inventoried: 0  
Previous user ID:  
Last activity: Never  
In-house uses: 0

Call number information

Call number: FIC ROW Class scheme: ATDEWEYLOC  
Call library: DLFN Shelving key: FIC ROW ROW HA  
 Shadow call number

Item information

Item ID: 32612000100069 Copy number: 1  
Type: FICTION **2** Party: DLFN  
Shelf location: AVAILABLE Current status: AVAILABLE  
Material type: BOOK Funding source: BIRTHDAY  
Media desk:  
Total checkouts: 0 Price: \$19.95  
 Permanent  Circulate  
 Shadow item

Extended information

Tag	Contents
CIRCNOTE	
PUBLIC	Donated by Steve Coon
STAFF	

## To Add a New Call Number

**NOTE:** Add a Call Number if:

- there are no items on that record in your library.
- there are items in your library, but they have a different call number than you want for this item.

1. **Click** on the Title.
2. **Click** on Add Call Number button at the bottom of the screen.
3. **Select** the library from the drop down box for the new call number, and then **click OK**.
4. **Modify** the call number.
5. **Add** the item information.

Call Number/Item Maint

Harry Potter and the chamber of secrets / Rowling, J. K.

Control Bibliographic **Call Number/Item** Bound-with

1 Harry Potter and the chamber of secrets - Rowling, J. K.

- FIC ROW RC 940 - DLFN
  - 32612015003407 - 1 - READPROGRM - MISSING - Can't
- FIC ROW - DLMS
  - 32612050040737 - 1 - FICTION - LOST-CLAIM
  - 32612050040702 - 2 - NONFICTION - INTRANSIT
  - 32612050040678 - 3 - NONFICTION - INTRANSIT
- FIC ROW - DLHS
  - 32612100084270 - 1 - FICTION - INTRANSIT
- FIC ROW - DLHS
  - 32612001413257 - 1 - FICTION - AVAILABLE

2

Return to Search Save Add Call Number Add Item Delete Close

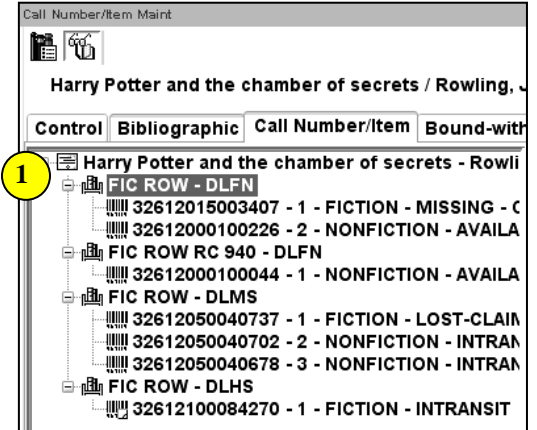
## To Add a New Item

**NOTE:** *You can add an Item if there is already an item with the call number and library you need on the record.*

1. **Click** (highlight) on the Call Number you want for your item.
2. **Click** the Add Item button at the bottom of the screen.
3. **Enter** the item information

Be sure to enter the following:

Item ID – use dumb barcode, barcode shortcut, or auto-generate  
 Item Type  
 Material Type  
 Funding Source  
 Number of pieces  
 Price  
 Notes



## Assigning Call Numbers

### What is a Call Number?

Call numbers are the map that lead your patron from the OPAC to the needed materials. Every item needs a call number. The call number should be clearly visible, i.e on the spine of a book.

Assigning call numbers will be necessary when importing records from SmartPort, cataloging with templates, changing existing call numbers in the collection, or adding item information to vendor records.

**NOTE:** INFOhio uses the Dewey Decimal Classification System not Library of Congress call numbers. Dewey numbers begin with numerals, i.e. 973.3. Library of Congress numbers begin with letters, i.e. JK146.

### Two key guidelines:

1. Be consistent:
  - Make building or district decisions regarding cataloging practices and follow those guidelines when assigning call numbers, i.e. biographies of sports figures are cataloged with sports rather than in the biography section.
  - When receiving new materials, check call numbers assigned to items in your vendor records to be certain they are consistent with your guidelines.
2. Keep your patron in mind:
  - Some materials can legitimately be cataloged in several ways. Choose the one most appropriate to the curriculum and the conditions in your school.
  - Always put a cataloged item in a section where it will get maximum usage.

### How to select a call number:

- A. Nonfiction items: follow the Dewey Decimal Classification System. Details below.
- B. Everything else: follow the established guidelines for your school. A typical call number will have a prefix indicating the item group (B, FIC, MAG, etc.) followed by 3 letters of the author's or subject's name. Consistency is important. Your ITC provider will be glad to help you determine the pattern in use by your school.

### Using the Dewey Decimal Classification System:

The Dewey Decimal Classification System is not a perfect system; not all books fit neatly into one number.

1. **Content** determines the call number of an item but some materials may be appropriately cataloged in more than one area.  
For example:
  - A biography of a baseball player may be in Biography (B, 92,921), or in Nonfiction (796.357 for *sports – baseball*).

- Little Red Riding Hood could be cataloged in Fiction, Picture books, Easy Fiction or Nonfiction - *FolkLore / Legends* (398s).
- Nonfiction materials dealing with narcotics/drugs could be in the *social sciences* (300s) or *health* (600s).
- A book titled *Math in Computing* could be cataloged in *math* (500s) or in *computers* (005s).

2. **Use the 082, 090 or 092 tag in the MARC record** to locate the Dewey call number.
- Both Dewey Decimal and Library of Congress call numbers may appear in these tags. Use Dewey Decimal call numbers only.
  - It may contain more than one so you should select the one that best represents your collection.

For example, a call number in the MARC record may look like this : 523.5'1, 523.5/1, 523.5 1 or 523.5|222

- The correct form for this particular call number is either 523.5 or 523.51
- The ' or / or the **space** in the suggested Dewey number indicates a logical breaking point in the call number.
- **|a** indicates separate call number choices.
- In Sirsi the first **|a** is assumed and does not display.
- **|2** indicates edition number not call number.

Remove any brackets [ ] that appear in call numbers, i.e. [Fic].

Follow your school library policy for call number format for Easy, Fiction and Biography items.

- Examples of 082, 09X tag information and call number options:

In the MARC record:	You should make it:
a362.29/5 222	362.29 362.295
a344/.73/0545	344 344.73 344.730545
a[Fic] 222	FIC
a551.6 a[E] 220	551.6 E
a973.7/092/4 a92 aB	973.7 973.7092 973.70924 92 B
a345.73/0277 a347.305277	345.73 345.730277 347.305277

**NOTE:** *If you assign a call number other than one found in MARC record, do not change the content in the 082 or 09X tag in the MARC record!*

3. **Check your library database** for call numbers of materials on the same topic.
4. **Check the OPACs of other schools** or your public library.

**Tips when entering your own call numbers:**

- A decimal point is the only punctuation in a call number.
- Do not end a call number in a 0 - i.e. 796.50 would be 796.5
- Do not let the width of your book spine determine the size of your call number.

For further assistance:

- Contact your ITC provider

Use any of the following online sites for call number suggestions

**Dewey Number sites:**

<http://www.loc.gov/marc/authority/ecadhome.html>

<http://classify.oclc.org/classify2/>

<http://library.thinkquest.org/5002/Alien/alien.htm>

<http://www.apl.org/libcats/dewey.html>

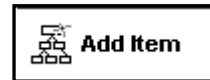
<http://www.deweybrowse.org/>

<http://www.kidsclick.org/>

## Add Item

The Add Item wizard is used to add a new item to a library's title. In a multi-library system, each library must have separate call numbers for the copies in its collection. You must have a call number that already exists in your library to use the Add Item wizard to add a copy in your own library.

1. **Click** on Item Maintenance group wizard.
2. **Click** on Add Item Wizard.



Add Item screen displays.

3. **Search** for the title to add an item.

**NOTE:** If your search finds results, a list of matching records displays in the hit list area. The selected title(s) will display in the lower portion of the window with two tabs, Description and Call Number/Item.

4. **Verify** the information on the Description tab matches the item you are adding.

Title /	Author	Pub. Info.	Phys. Desc.	Pub. Year
All about the book! [videorecording] ...	Rowling, J.K.	Wheeling, IL : Film Ideas, Inc.,...	1 videocassette (21 min.) : s...	2005
Harry Potter and the chamber of secr...	Rowling, J. K.	New York : A.A. Levine Books...	341 p. ; 20 cm.	1998
Harry Potter and the Chamber of Sec...	Rowling, J. K.	New York : Levine, 1999	341 p.	1999
Harry Potter and the deathly hallows	Rowling, J. K.	New York : A.A. Levine, 2007.	759 p. : ill. ; 24 cm.	2007
Harry Potter and the goblet of fire	Rowling, J. K.	New York : Arthur A. Levine B...	734 p. : ill. ; 24 cm.	2000
Harry Potter and the goblet of fire	Rowling, J. K.	New York : Scholastic, [2002],...	xi, 734 p. : ill. ; 20 cm.	2002
Harry Potter and the half-blood prince	Rowling, J. K.	New York : Arthur A. Levine, 2...	x, 652 p. : ill. ; 24 cm.	2005
Harry Potter and the Order of the Ph...	Rowling, J. K.	New York : Scholastic, 2003.	xi, 870 p. : ill. ; 24 cm.	2003
Harry Potter and the prisoner of Azka...	Rowling, J. K.	New York : Scholastic Inc., [2...	435 p. : ill. ; 20 cm.	2001
Harry Potter and the Sorcerer's Stone	Rowling, J. K.	New York : Levine, 1998	309 p.	1998
J.K. Rowling : banned, challenged, a...	MacDonald, Joan Vos.	Berkeley Heights, NJ : Enslow...	160 p. : col. ill. ; 25 cm.	2008

Select the title to which you want to add a new item, **click** Modify.



Add Item screen displays.

**NOTE:** If specific title/item displays, move to Step 5.

5. **Click** on the call number and library you want for your item.

6. **Click** Add Item button at the bottom of the screen.

*Add Item/Item Information* screen displays. The default item information will appear.

7. **Item ID** – you should select one of the following procedures to enter item IDs. Select the one method that works best for your school:

- Dumb barcodes – **scan or type** the barcode number. If you scan the

barcode, the number will be saved to the record and appear on the left side of the screen. If barcode validation is turned on for your district, you will be able to type the barcode shortcut.

- Barcode Shortcut – If you are using this feature, you must have auto-generate barcodes turned off in properties. You will be able to type just the significant digits with an x. However, you will need to keep track of the significant digits.

Ex. 32612000100069 could be typed as 10006X

- Auto-generate barcodes – A new barcode number will automatically be generated. Check with your ITC to request this function be set up for your district. You also must have Auto-generate item ID checked in properties (Right click on the Add Item wizard > select properties > Behavior tab > check Auto-generate item id).



8. **Add or modify** the remaining fields in the *Item Information* and *Extended Information* areas as needed.

**Type:** Use the Drop Down menu to select the item group.

**Shelf Location:** Leave to default – Available

**Material Type:** Use the Drop Down menu to select the material type (this is the icon that will display in the online catalog).

**Media Desk** – leave blank

**Total Checkouts** – leave blank – the system generates this number.

**Copy Number** – system generated – do not change.

**Item Library** – your library should be there. If a different library appears, you have selected the wrong call number. Click Delete and go back to Step 5.

**Funding Source** – optional

**Number of pieces** - indicates the number of pieces associated with a particular copy. If a value of two or more is entered in the number of pieces field, the Circulation wizards will require an override code to check out and check in the item to remind the library staff to check for number of pieces associated with this item.

**Price** - Enter Price

Permanent – leave checked

Circulate – leave checked

Shadow item – check if you do not want the item to appear in the online catalog.

Call number information	
Call number:	FIC ROW
Class scheme:	ATDEWEYLOC
Call library:	DLFN
Shelving key:	FIC ROW ROW HAR RC 000940
<input type="checkbox"/> Shadow call number	
Item information	
Item ID:	32612000100069
Copy number:	1
Type:	FICTION
Item library:	DLFN
Shelf location:	AVAILABLE
Current status:	AVAILABLE
Material type:	BOOK
Funding source:	BIRTHDAY
Media desk:	
Number of pieces:	1
Total checkouts:	0
Price:	\$19.95
<input checked="" type="checkbox"/> Permanent	
<input checked="" type="checkbox"/> Circulate	
<input type="checkbox"/> Shadow item	
Extended information	
Tag	Contents
CIRCNOTE	
PUBLIC	Donated by Steve Coon
STAFF	

### Extended Information

**Circ Note** – appears when the item is checked in and checked out. Use for comments such as 10 copies in set, CD at desk, etc.

**Public** – enter any comments you want to appear in the online catalog such as Donated by the Smith Family.

**Staff** – enter any comments you want to appear only in Workflows such as PO # 1234.

9. **Click** Save to save changes

<b>Return to Search</b>	<b>Save</b>	<b>Add Item</b>	<b>Delete</b>	<b>Close</b>
-------------------------	-------------	-----------------	---------------	--------------

10. **Select** from options:

**Return to Search** – sends you back to search screen – no changes made.

**Save** – saves your changes.

**Add Item** – lets you add another item to the record.

**Delete** – removes the item you just added.

**Close** – closes the Add Item wizard.

**Note:** For more detailed information or specific questions, use **HELP** wizard.

1. **Click** on Item Maintenance Wizard group.



2. **Click** on Add Item Wizard.

3. **Search** for item or title of the item you want to add.

*A list of matching records displays in the hit list area.*

4. **Select** the title to which you want to add a new item, click **Modify**.

*Add Item* screen displays.

5. **Select** the call number to which you want to add an item.

6. **Click** Add Item button.

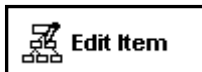
7. **Add or modify** the fields in the *Item Information* and *Extended Information* areas as needed.  
Scan barcode AFTER adding and making changes.

8. **Click** Save to save changes

## Edit Item

The Edit Items wizard is used to select and modify individual items of a library's title.

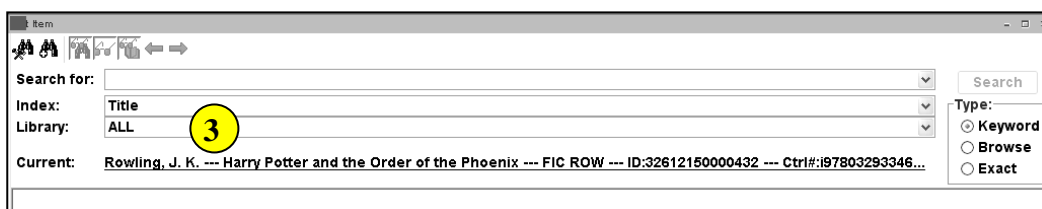
1. **Click** the Item Maintenance Wizard Group.
2. **Click** on Edit Item Wizard.



Item Search screen displays.

**NOTE:** The title you select must have an attached copy to use the Edit Item wizard.

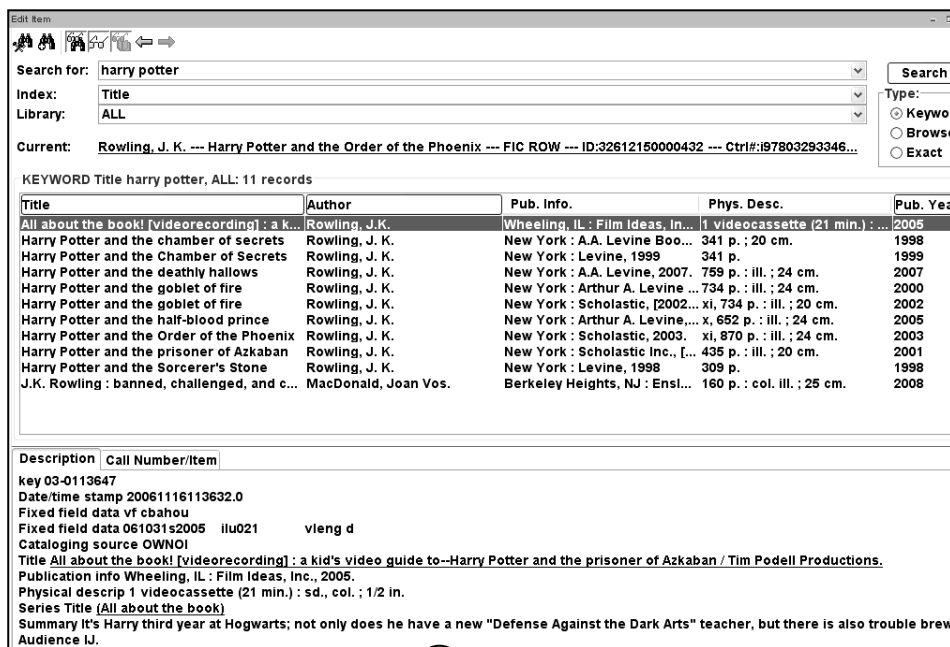
3. **Search** for item or title of the item you want to edit. If a current record exists for the item, **click** the Current information link to access the last record displayed, modified, or added.



The Edit Item screen displays

**NOTE:** If your search finds results, a list of matching records displays in the hit list area. The selected title(s) will display in the lower portion of the window with two tabs, Description and Call Number/Item.

4. **Select** the title containing the item you want to edit. **Click** Modify.



Edit Item screen displays.

5. **Select** the copy you wish to edit.

6. **Add or modify** the fields in the Item information and Extended Information areas as needed.

**Item ID** – if changing the item’s barcode number, you can scan a dumb barcode, type a 13 digit barcode, or type the barcode shortcut (significant digits with an X).

**Type:** Use the Drop Down menu to select the item group.

**Shelf Location:** Leave to default – Available

**Material Type:** Use the Drop Down menu to select the material type (this is the icon that will display in the online catalog).

**Media Desk** – leave blank

**Total Checkouts** – leave blank – the system generates this number.

**Copy Number** – system generated – do not change.

**Item Library** – your library should be there. If a different library appears, you have selected the wrong call number. Click Delete and go back to Step 5.

**Funding Source** – optional

**Number of pieces** - indicates the number of pieces associated with a particular copy. If a value of two or more is entered in the number of pieces field, the Circulation wizards will require an override code to check out and check in the item to remind the library staff to check for number of pieces associated with this item.

---

**Price -** Enter Price

Permanent – leave checked

Circulate – leave checked

Shadow item – check if you do not want the item to appear in the online catalog.

**Extended Information**

**Circ Note** – appears when the item is checked in and checked out. Use for comments such as 10 copies in set, CD at desk, etc.

**Public** – enter any comments you want to appear in the online catalog such as Donated by the Smith Family.

**Staff** – enter any comments you want to appear only in Workflows such as PO # 1234.

7. **Click** Save to save changes.



8. **Select** from options:

**Return to Search** – sends you back to search screen – no changes made.

**Save** – saves your changes.

**Close** – closes the Add Item wizard.

**Note: For more detailed information or specific questions, use HELP wizard.**

1. Click on Item Maintenance wizard group.
2. **Click** on Edit Item Wizard.



*Item Search* screen displays.

- The title you select must have an attached copy to use the Edit Copies wizard.
3. **Search** for the item or title of the item you want to edit.
    - If a current record exists for the item, **click** the Current information link to access the last record displayed, modified, or added.

*Edit Item* screen displays.

4. **Select** the title for the item you want to edit from the hit list pane.
5. **Click** on *Modify*.
6. **Select** the item you wish to edit.
7. **Add or modify** the fields in the *Item Information* screen area of the Call Number/Item folder as needed.
8. **Click** Save to save changes.

## Change Item ID

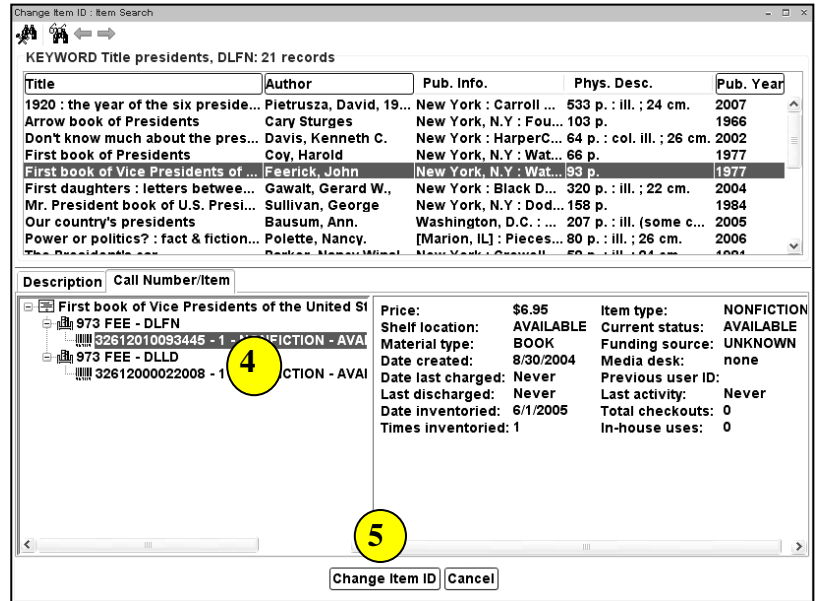
The Change Item ID wizard is used to replace a missing, damaged, or temporary barcode.

1. **Click** on Item Maintenance Group Wizard.
2. **Click** on Change Item ID Wizard.



The *Change Item ID: Item Search* Helper screen displays.

3. **Search** for the record containing your item.
4. **Select** the item in the Call Number/Item window.
5. **Click** Change Item ID button at the bottom of the screen.

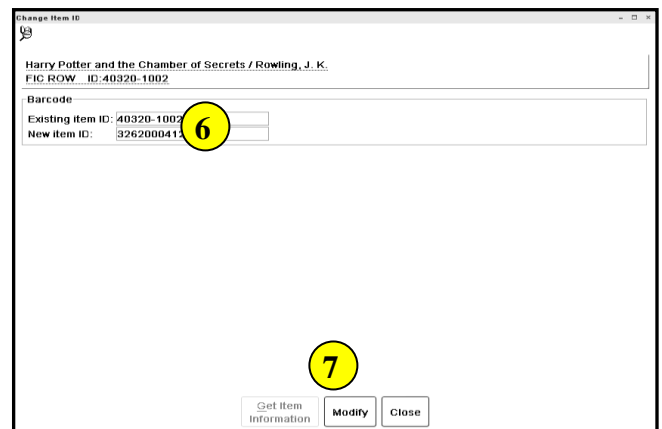


*Change Item ID* screen displays.

6. **Scan or type** the new item barcode number.

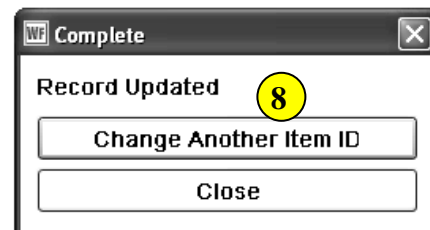
**NOTE:** If you don't have a scanner, you can use the barcode shortcut (type the significant digits plus an X).

7. **Click** Modify.



The *Complete* screen displays.

8. **Click** Change Another Item ID or **click** close.



**Note:** For more detailed information or specific questions, use HELP wizard.

1. **Click** on Item Maintenance Group Wizard.
2. **Click** on Change Item ID Wizard.

The *Change Item ID: Item Search* Helper screen displays.

3. Search for the Item to change.
4. **Select** the item in the Call Number/Item window.
5. **Click** Change Item ID button.
6. **Scan or type** the new item barcode.
7. **Click** Modify.

**Change Item ID**

Change Item ID : Item Search

KEYWORD Title presidents, DLFN: 21 records

Title	Author	Pub. Info.	Phys. Desc.	Pub. Year
1920 : the year of the six preside...	Pietrusza, David, 19...	New York : Carroll ...	533 p. : ill. ; 24 cm.	2007
Arrow book of Presidents	Cary Sturges	New York, N.Y. : Fou...	103 p.	1966
Don't know much about the pres...	Davis, Kenneth C.	New York : HarperC...	64 p. : col. ill. ; 26 cm.	2002
First book of Presidents	Coy, Harold	New York, N.Y. : Wat...	66 p.	1977
First book of Vice Presidents of ...	Feerick, John	New York, N.Y. : Wat...	93 p.	1977
First daughters : letters between...	Gawalt, Gerard W.,	New York : Black D...	320 p. : ill. ; 22 cm.	2004
Mr. President book of U.S. Presi...	Sullivan, George	New York, N.Y. : Dod...	158 p.	1984
Our country's presidents	Bausum, Ann.	Washington, D. C. : ...	207 p. : ill. (some c...	2005
Power of politics? : fact & fiction...	Polette, Nancy.	[Marion, IL] : Piece...	80 p. : ill. ; 26 cm.	2006
The Presidents...	...	...	...	...

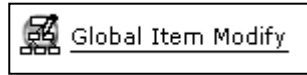
Description	Call Number/Item	Price:	Item type:
First book of Vice Presidents of the United S...	973 FEE - DLFN	\$6.95	NONFICTION
973 FEE - DLFN	32612010093445 - 1 - NONFICTION - AVA...	Shelf location: AVAILABLE	Current status: AVAILABLE
973 FEE - DLLD	973 FEE - DLLD	Material type: BOOK	Funding source: UNKNOWN
32612000022008 - 1 - NONFICTION - AVAI...	32612000022008 - 1 - NONFICTION - AVAI...	Date created: 8/30/2004	Media desk: none
		Date last charged: Never	Previous user ID:
		Last discharged: Never	Last activity: Never
		Date inventoried: 6/1/2005	Total checkouts: 0
		Times inventoried: 1	In-house uses: 0



## Global Item Modify

The Global Item Modify wizard allows the cataloger to select items, and globally apply changes to all item IDs that are scanned.

1. **Click** on Cataloging Wizard group.
2. **Click** on Global Item Modify.



*Global Item Modify screen displays.*

3. Under Item Values to Modify, make any needed changes to the item value fields. **Select** a new policy value from the drop-down list. To reset the item values, click Reset.

Global Item Modify

Item ID: 32614135011351

Item Values to Modify

Item group: »Will not be modified Shelf location: DISCARD Material type: »Will not be modified

Funding source: »Will not be modified Item library: »Will not be modified Shadowed: »Will not be modified

Permanent: »Will not be modified Circulate: »Will not be modified Price: »Will not be modified

Title	Author	Call number	Copy
First dog	Lewis, J. Patrick.	E LEW	1

Item type: EASY  
Shelf location: AVAILABLE **Modified to: DISCARD**  
Material type: BOOK  
Funding source: »Will not be modified  
Item library: FNWA  
Shadowed: N  
Permanent: Yes  
Circulate: Yes  
Price: \$15.95

4. In the Item ID box, **scan or type** each item's ID that you wish to modify. Use the Modify Selected Items helper to search by title.
5. The call number, copy, and item ID of the items edited will appear in the window. Change takes place immediately
6. **Continue** scanning items to change or select:
  - a. Reset – Reverts Item Values to default.
  - b. Clear – Removes the item information.
  - c. Close – Exits Global Item Modification.



## How to Discard / Remove Items

To Discard items, **click** on Cataloging Wizard group >> **click** on Global Item Modify.

Under *Item Values to Modify*:

1. **Change** the shelf location to DISCARD.
2. **Change** Item Library to your library.  
Ex: PEMS

3. In the Item ID box, **scan** or type each item's ID that you want to modify. Use the Modify Selected Items helper to search by title.

The call number, copy, and item ID of the items edited will appear in the window.

**Change takes place immediately!**

4. **Continue** scanning in items to change.... or select:
  - d. Reset – Reverts Item Values to default.
  - e. Clear – Removes the item information.
  - f. Close – Exits Global Item Modification.

Title	Author	Call number	Copy	Item ID
Death be not proud	Gunther, John	B GUN	1	30740000702741
Hatchet	Paulsen, Gary...	FIC PAU	1	30740000775242

Item type: FICTION  
Shelf location: AVAILABLE Modified to: DISCARD  
Material type: BOOK  
Funding source: UNKNOWN  
Item library: PEMS  
Shadowed: N  
Permanent: Yes  
Circulate: Yes  
Price: \$7.77

5. **Click** Close when finished.

**NOTE:** Once an item's status is changed to DISCARD, it is shadowed in CAT.

6. **Notify** your ITC (formerly DASite) when you want the items deleted from your database. They will delete them for you and give you a report listing all the items that were deleted.

## How to Create/Correct new Library Call Number

Title exists in the database. There are 4 libraries in the district.

Library A has a Call Number with one item under it.

Library B has a Call Number with two items under it –both belong to Library B.

Library C has a Call Number with two items under it, however one belongs to Library D.

*Need to **move one of the items** from Library C to **Library D** (was incorrectly cataloged to wrong Library Call Number).*

The screenshot shows the 'Global Item Modify' form for the item 'Cat and dog / Minarik, Else Holmelund.'. The 'Call number information' section shows 'Call number: E MIN', 'Call library: LMLB', and 'Shelving key: E MIN MIN CAT'. The 'Item information' section shows 'Item ID: 32620300025977', 'Type: EASY', 'Shelf location: AVAILABLE', 'Material type: BOOK', 'Media desk: ', 'Total checkouts: 0', 'Copy number: 2', 'Item library: LMLB', 'Current status: AVAILABLE', 'Funding source: ', 'Number of pieces: 1', 'Price: \$5.00', and checkboxes for 'Permanent' and 'Circulate'. The 'Extended information' section has 'Tag' and 'Contents' tabs.

**Click** on Cataloging Wizard group >> **click** on Global Item Modify.

Under *Item Values to Modify*:

1. **Select** the correct Item Library
  - a. LMIN

The screenshot shows the 'Global Item Modify' form with the 'Item Values to Modify' section expanded. The 'Item library' dropdown menu is open, showing a list of libraries: DISTRICT, LMEC, LMFM, LMHE, LMHS, LMIN, and LMLB. The 'LMIN' option is selected and circled in red. A yellow circle with the number '1' is placed above the dropdown menu.

- In the Item ID box, **scan** or type the item's ID that you want to modify. **Click** Modify button.

Title	Author	Call number	Copy	Item ID
Cat and dog	Minarik, Else Holmelund.	E MIN	1	32620300025977

<b>Item type:</b>	EASY
<b>Shelf location:</b>	AVAILABLE
<b>Material type:</b>	BOOK
<b>Funding source:</b>	
<b>Item library:</b>	LMLB <b>Modified to: LMIN</b>
<b>Shadowed:</b>	N
<b>Permanent:</b>	Yes
<b>Circulate:</b>	Yes
<b>Price:</b>	\$5.00

The call number, copy, and item ID of the item edited will appear in the window. **Change takes place immediately!**

- Click** Close when finished.
- If needed, **Select** Call Number/Item Maint wizard to edit call number prefix.

1. **Click** on Cataloging Wizard.
2. **Click** on Global Item Modify Wizard.
3. In Item Values to Modify, **select** correct item value changes. To reset item values, **select** Reset.
4. In Item ID box, **scan or type** each item that you want to modify.
5. Call number, copy and item ID will appear in list; change takes place immediately.
6. Continue scanning in items to be modified.

## Transfer Titles, Call Numbers, or Items

The Transfer Titles, Call Numbers, or Items wizard is used to transfer one object to another object already in the database.

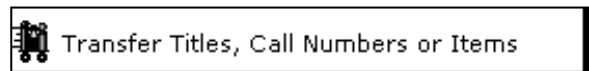
This wizard performs the following functions:

- Transfer an item to an existing call number on the same record or on a different record.
- Transfer a call number and all of its associated items to a different existing record.
- Transfer all call numbers/items from one existing record to a different existing record.

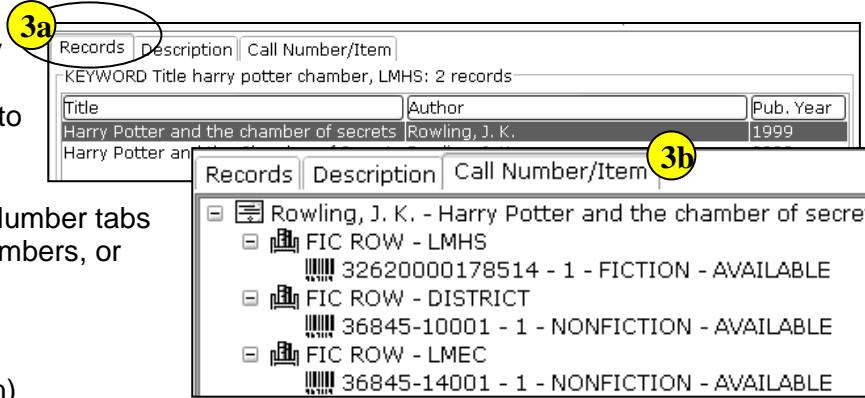
**Note:** Items in transit or on reserve cannot be transferred.

### Transferring an item or call number to a different record

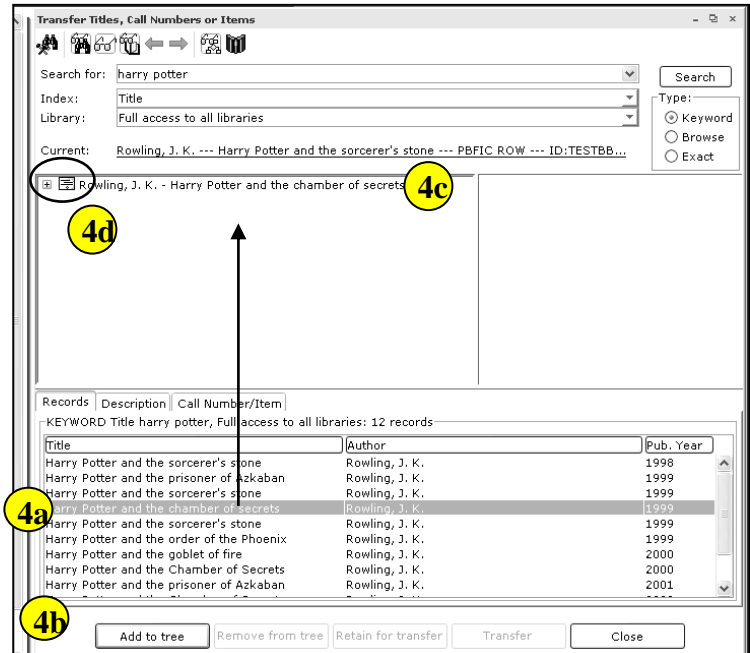
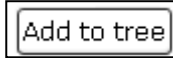
1. **Click** the Cataloging wizard group.
2. **Click** the Transfer Titles, Call Numbers, or Items wizard.
3. **Search** for the source you want to transfer (poor record).



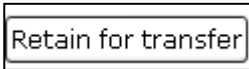
- a. **Click** the Records tab to display the List of titles.
- b. **Click** the Call Number/Item tab to display call number/item information. You may click back and forth on Records and Call Number tabs to locate the correct title, call numbers, or items.



4. On the Records list: (bottom screen)
  - a. **Select** the title you want to transfer (poor record).
  - b. **Click** Add to Tree button.
  - c. The record displays in the Transfer tree pane. (top screen)
  - d. **Click** the plus sign to open record tree. (MAC displays ► ▼)



- In the Transfer tree pane, **click** on the title, call number, or item you want to transfer, (poor record) and then **click Retain for Transfer** button at the bottom of the screen.



More than one item can be transferred at a time. The call number or item line selected will display in italics.

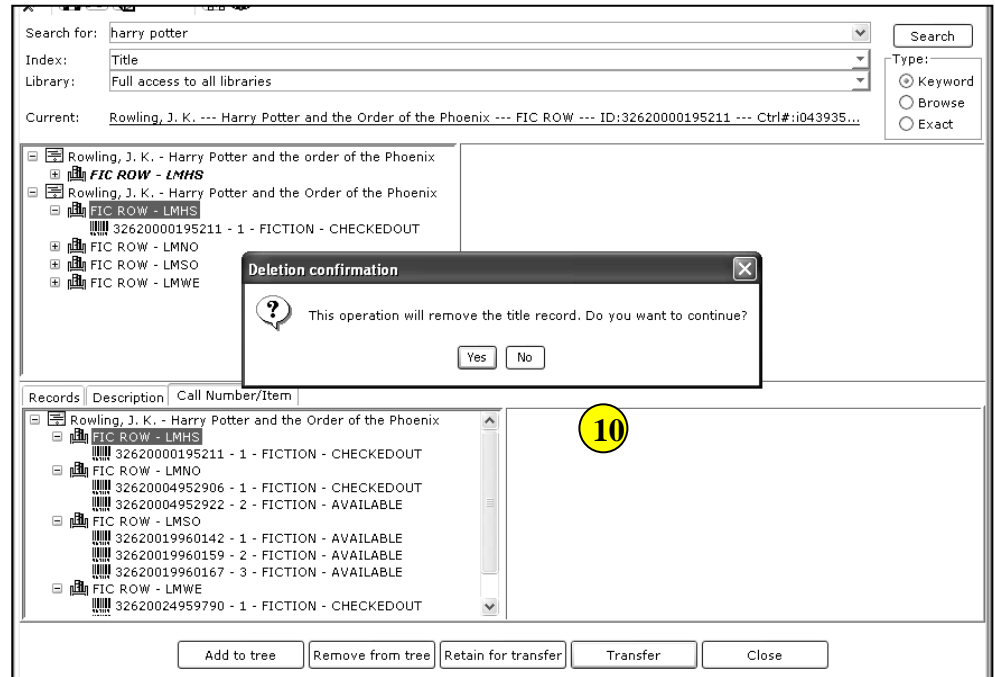
- In the **Records** list (bottom screen) **click** on the title to which you want to transfer call numbers or items. (good record) You may click back and forth on Records and Call Number tabs to locate the correct title/item.

- Click** the Add to Tree button at bottom of the screen. You will now have 2 titles/items in the top screen.

- In the Transfer tree pane, **select** the destination record (good record).

- Click** Transfer button.

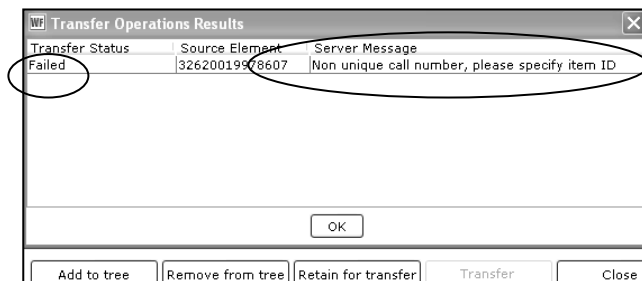
10. Depending on how properties are configured, a message may display stating that this operation will remove the title record.
- Click** Yes to proceed with the transfer.
  - Click** No to cancel the transfer.



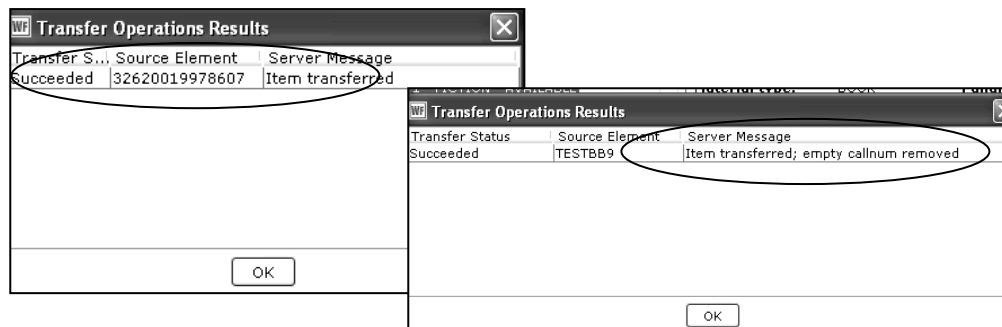
A Transfer Operation Results dialog box displays with information about the transfer status, item number, and server message.

11. **Click** OK to close the dialog box.

**Unsuccessful:**



**Successful:**

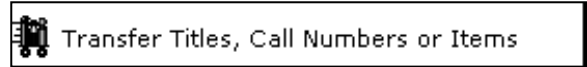


12. **Click** Close to close the wizard.



**Transferring an item to a different call number on the same record**

1. **Click** the Cataloging wizard group.
2. **Click** the Transfer Titles, Call Numbers, or Items wizard.
3. **Locate** the record containing the item(s) you want to transfer.



*In this example, the librarian wants all 6 copies on one call number. She will transfer copies 2-6 to the first copy, and then remove the copy number from the call number.*

4. **Highlight** Title and **click** Add to tree.
5. **Click** on the barcode number of item you want to move.
6. **Click** Retain for transfer.
7. **Repeat** for each item you want to move.

8. **Click on the barcode number** under the destination call number.
9. **Click** Transfer.

*Transfer Operations Results screen will display.*

10. **Click** OK and Close.

Use the Call Number and Item Maintenance wizard to make additional changes to call number or item information.

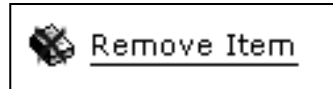
Transfer Status	Source Element	Server Message
Succeeded	30455006040661	Item transferred; empty callnum removed
Succeeded	30455006040653	Item transferred; empty callnum removed
Succeeded	30455006040646	Item transferred; empty callnum removed
Succeeded	30455006040638	Item transferred; empty callnum removed
Succeeded	30455006040620	Item transferred; empty callnum removed

1. **Click** on Cataloging Wizard.
2. **Click** on Transfer Item Wizard
3. In the Item Lookup step, **identify** the source title (poor record).
4. From the records list, **select** the title/item you want to transfer, **click** Add to Tree.
5. In the Transfer tree pane, **click** on the title/item you want to transfer, **click** Retain for Transfer.
6. **Identify** the record to which you want to make the transfer, **click** Add to Tree.
7. In Transfer tree pane, **select** the destination record (good record), **click** Transfer button.
8. Transfer Operation Results box will display with information about transfer.

## Remove Items

The Remove Item wizard guides you through the process of completely removing a title, call number, or item from the database. *Items cannot be removed if they have an open transaction (loan or fine).*

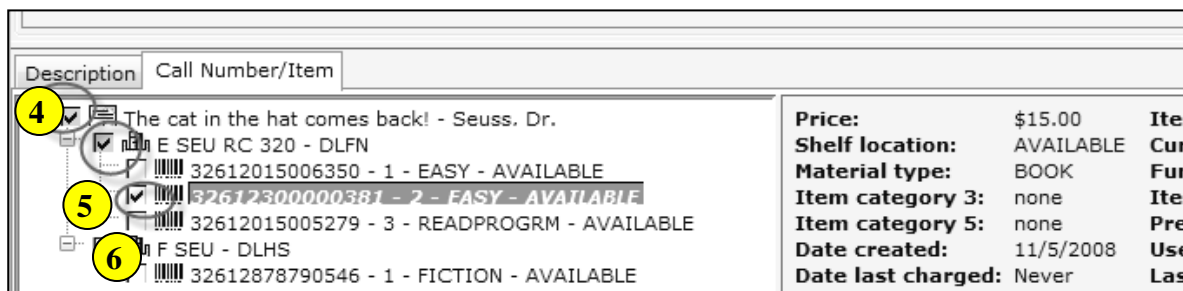
1. **Click** the Cataloging group wizard
2. **Click** the Remove Items wizard



3. **Search** for the title, call number, or copy(s) you want to remove.

**NOTE:** The Call Number / Item tab displays a hierarchical structure (tree view) of the title, call numbers and items. To expand (click a plus sign) (MAC click ►▼) to collapse (click a minus sign).

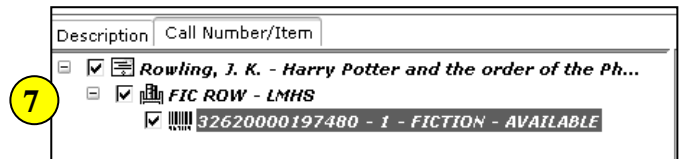
4. To delete the title and associated call numbers and items, **select** the check box next to the title you want to delete.



5. To delete the call numbers and associated items, **select** the check box next to the call number record you want to delete.

6. To delete an item, select the check box next to the item(s).

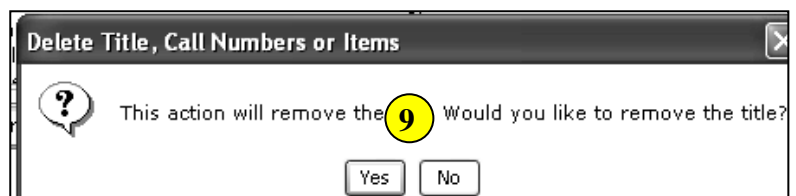
7. If the item is the LAST item on the record, all pieces will be checked to be deleted.



8. **Click** Delete button.



**NOTE:** If this is the last (only) copy attached to the record, a warning that you are about to remove the title will appear.



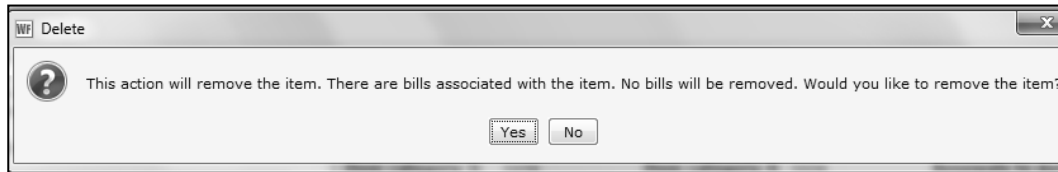
9. **Click** YES or NO.

**NOTE:** Even if you select to remove all copies, the title and one call number with 0 copies will not be removed if permission has not been granted.

### Removal of item with open transaction

If item is still considered “checked out” to a patron (ie: Lost-Claim item, bill not paid) it cannot be removed until the transaction has been completed.

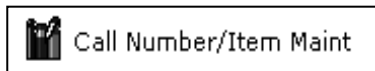
If item has been checked in, but has an open “bill” (fine or other bill), item can be removed if desired, bill will remain on the patron record. Title information will display in user record until bill has been paid. Item ID of a deleted item does NOT appear.



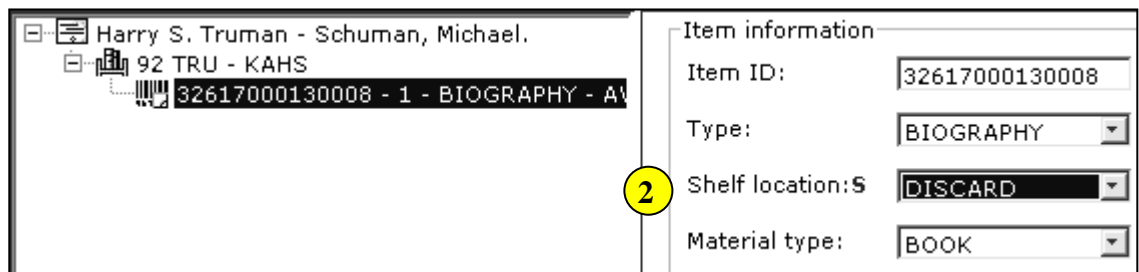
### Other options for deleting items

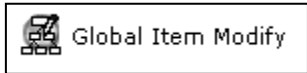
If you delete an item with the Remove Item Wizard, you will not be able to include it in reports. Either of the following methods will allow you to run a report for items with the status of DISCARD so you have a record of items you are removing from your database. Once you are satisfied with the list, contact your ITC to delete all the DISCARD items for you.

#### Call number and item maintenance



1. **Display** the item record you want to delete.
2. **Change** the item shelf location to DISCARD.
3. A small red S will appear next to the word DISCARD. This indicates that the item is now shadowed in the online catalog.





**Global Item Modify**

This is a quick and easy method if you are weeding a lot of items at once.

1. **Click** on the Global Item Modify wizard.
2. **Change** Shelf location to DISCARD.
3. **Scan** the items you want to discard.
4. **Contact** your ITC provider to mass-delete the DISCARD items.

**Global Item Modify**

Item ID: 3

Item Values to Modify 2

Item group:	»Will not be modified ▼	Shelf location:	DISCARD ▼	Material type:	»Will n
Funding source:	»Will not be modified ▼	Item library:	»Will not be modified ▼	Shadowed:	»Will n
Permanent:	»Will not be modified ▼	Circulate:	»Will not be modified ▼	Price:	\$

**Note: For more detailed information or specific questions, use HELP wizard.**

1. **Click** on Remove Item Wizard.
2. In the Item Lookup step, **identify** the title, call number, or item you want to remove.
3. To delete the title and its call numbers and items, **select** the check box next to the title.
4. If you are removing selected items, **select** the checkbox next to the item or items to remove.
5. **Select** the *Delete* button.

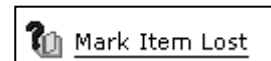
The Remove wizard is delivered to prevent the accidental removal of a title when the last call number is removed. If removal is permitted, and this is the last (only) copy attached to the record, a warning will appear. If necessary, the Remove step displays an exception list indicating why the selected copies could not be removed. The number of volumes/copies removed also displays. Even if you select to remove all copies, the title and one call number with 0 copies will not be removed if permission has not been granted.

## Marking an Item as Lost

A user may tell the library staff that he or she lost an item. Use the Mark Item Lost wizard to mark the item in the catalog as Lost. This will change the item's current status to LOST-CLAIM without checking in the item from the student's record. As you mark an item as Lost, you are given the option of creating a lost item bill, assessing a processing fee, or canceling the lost item bill and processing fee. *If a bill is to be created, it must be done at this step.* When an item is marked as Lost, the system does the following.

- Shadows the item in the catalog so that other users will not inquire about the item.
- Prevents holds from being placed on the lost item.
- Keeps the item on the student's record (as INACTIVE LOAN) until the lost item bill is paid, forgiven, or waived.
- Maintains the current status of LOST-CLAIM until the item returns to circulation.

1. **Click** on Item Maintenance wizard group.
2. **Click** on Mark Item Lost Wizard.



Mark Item Lost: Item Search screen displays.

3. **Scan or type** the item ID in the entry box or Search for the item using the search item helper.

4. **Click** OK.

5. If a list appears, **select** one of the items in the list.

6. **Click** the Call Number/Item tab to view information.

7. **Select** the correct item to mark lost.

8. **Click** the Mark Item Lost button at the bottom of the screen.

The screenshot shows the 'Mark Item Lost' wizard interface. It includes a search form with fields for 'Identify item', 'Item ID', 'Search for', 'Index', and 'Library'. Below the search form is a table of search results. The 'Call Number/Item' tab is selected, showing a list of items with call numbers and descriptions. The 'Mark Item Lost' button is highlighted at the bottom.

Title	Author	Pub. Year
Harry Potter and the chamber of secrets	Rowling, J. K.	1999
Harry Potter and the Chamber of Secrets	Rowling, J. K.	2002

Description	Call Number/Item	Price	item group
Rowling, J. K. - Harry Potter and the chamber of secret		\$19.95	
FIC ROW - LMHS		Shelf location: AVAILABLE	Current location:
32620000178514 - 1 - FICTION - HOLDS		Material type: BOOK	Funding source:
36845-1002 - 2 - NONFICTION - CHECKEDOUT		Date created: 8/17/2004	Media desk:
FIC ROW - LMEC		Date last charged: 12/28/2005	Previous user ID:
36845-14001 - 1 - NONFICTION - AVAILABLE		Last discharged: 12/28/2005,15:12	Last activity:
FIC ROW - LMEC		Date inventoried: 5/24/2005	Total checkouts:
TESTBB7 - 1 - NONFICTION - AVAILABLE		Times inventoried: 1	In-house uses:
PBFIC ROW - LMEC			
TESTBB8 - 1 - NONFICTION - AVAILABLE			
F ROW - LMFM			
TESTBB6 - 1 - NONFICTION - AVAILABLE			
FIC ROW - LMFM			
32620065132372 - 1 - FICTION - AVAILABLE			

**HINT:** If you know the user who lost the item, it may be faster to display his record to locate the item.

Mark Item Lost Confirmation screen displays.

**Click OK.**

Mark Item Lost : Confirmation

User ID: 22612001712153  
 Bollinger, HALEY MADISON  
 Lost item fee: \$13.95  
 E DAL  
 32612010032849  
 Thanksgiving story  
 Dalgliesh, Alice

OK (c)

Mark Item Lost: Billing for Lost Item/ Processing Fee screen displays.

9. **Evaluate** the information to make sure the correct user and item are displayed.
10. **Enter or Edit** the amount shown in Billing Information. If a Processing Fee is to be assessed, **type** the amount in the box.

Mark Item Lost : Billing for Lost Item/Processing Fee

Billing user  
 User ID: 22620000720200  
 Alt ID: SMITH, DAVID (J.)

For lost item  
 Item ID: 36845-1002  
 Title: Harry Potter and the chamber of secrets  
 Author: Rowling, J. K. FIC ROW  
 Price: \$.00

Billing info  
 Amount:   
 Lost item: \$15.00  
 Processing fee:   
 Payment type: FORGIVEN

a Bill User    c    b Pay Now    d    e Cancel Lost Item Bill

- a. If you want to bill the user for the lost item, **click** Bill User. You will be able to accept payments at a later time using the Pay Bills wizard.
- b. If the user wants to pay the **FULL** lost item bill immediately, **click** Pay Now. A confirmation screen will display that can also be printed for a receipt.
- c. If the user wants to make a **partial payment**, **click** Bill User. You'll need to use the Pay Bills wizard to record the payment when it's made.
- d. To clear the item from the User's account and not bill the user, **select** the payment type of "Forgiven" and then **click** the "Pay Now" button.
- e. If you want to waive the lost item bill for the user, while maintaining the user's responsibility for the lost item, **click** Cancel Lost\*\* Item Bill. Item will remain attached to the patron's record but no fine/fee will be created.

**\*\*NOTE:** The intent of the "Cancel Lost Item Bill" option in the Mark Item Lost wizard is to provide the staff with a way to NOT bill the user for the lost item, but still keep the lost item associated with the User. You will not be able to delete the item if this option is selected.

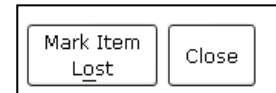
**NOTE:** If you are using the Credit User Account wizard, see full guide for other payment options.



11. **Click** OK.  
*Mark Item Lost screen displays,*  
The item marked lost displays in the List of Items.

Title »	current status
Harry Potter and the chamber of secrets	LOST-CLAIM

12. **Click** Mark Item Lost button to declare another item lost or **click** Close.



**NOTE:** *Items may be automatically marked as "Assumed Lost" after a specified time period with the Assumed Lost (Assumedlost) report. This report can be set up to assess a lost item bill and a processing fee according to the library's lost item billing policies, and to prepare lost item billing notices.*

***What happens when the user pays the bill for a Lost item?***

When the user pays the bill for the lost item, or the staff member forgives or waives the lost item bill, the item is removed from the user record and retains its LOST\_CLAIM or LOST\_ASSUM location. The item retains the LOST\_CLAIM or LOST\_ASSUM location unless the item is found and checked back into the system, renewed, checked out, or put in transit.

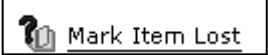
***What happens if the item is returned or found before the user pays the lost item bill?***

If the item is returned or found before the user pays the lost item bill, the system displays a message when you check the item in, check it out to another user, renew the item, or put the item in transit. The item's LOST\_CLAIM or LOST\_ASSUM location is cleared, and the lost item bill is removed from the user record. If a lost item processing fee was assessed at the time the item was marked "Claims Lost" or "Assumed Lost," and if the library's policies are so configured, the fee is automatically removed from the user's bill record as well. The overdue fine for the item is calculated and added to the user record.

***What happens if the item is returned or found after the user pays the lost item bill?***

If the item is returned or found after the user has paid the lost item bill, the system alerts you that the LOST\_CLAIM or LOST\_ASSUM location was cleared. When you see this message, you know that the item had been marked as Lost, and the lost item bill was paid or waived. You may issue a refund to the user for the paid lost item bill according to your library's procedures. You can find the amount paid in the User's record (Display User > Bills Tab > use drop down menu to select Paid bills or in the Item Record (Item Search > Detailed Display > Call Number and Item Tab > Bills Tab)

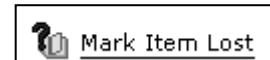
**Note: For more detailed information or specific questions, use HELP wizard.**

1. **Click** on Item Maintenance button. 
2. **Click** on Mark Item Lost button.
3. *Mark Item Lost: Item Lookup* screen **displays**.
4. **Scan or type** in barcode or use the Lookup Item button.
  - If more than one title displays, select the desired title.
  - If more than one copy displays, select the desired copy.
5. *Mark Item Lost: List of Lost items* displays. **Click** OK
6. Bill user – pay now, pay later, forgive bill, waive bill. Transaction now complete, item status is "**Lost-Claims**".
7. Items may be automatically marked as "**Assumed Lost**" after a specified time period with the Assumed Lost (Assumedlost) report.

**CONTINUED**

### When checked out to a user

1. **Click** on Item Maintenance button.



2. **Click** on Mark Item Lost button.

3. If the item is checked out, the *Mark Item Lost Clear Checkout Override* screen **displays**.

4. Override and Mark Item Lost. (enter your override password)

5. *Mark Item Lost: Billing for Lost Item/Processing Fee* screen **displays**.

6. Modify entries as needed.

7. Choices:

- Pay Later
- Pay Now
- Cancel Lost Item Bill

8. **Click** OK

## Marking an Item Lost

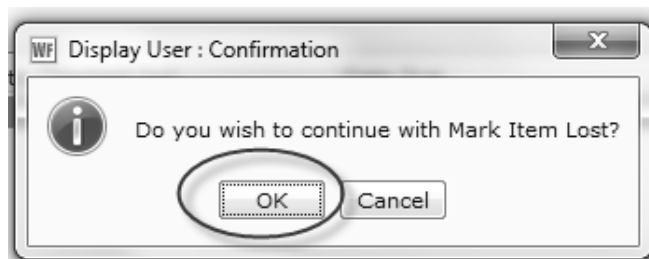
**Note:** For more detailed information or specific questions see guide, *Mark Item Lost*.

On user record (in any wizard) find the patron, **right-click** on the title that is to be marked LOST, select **Mark Item Lost**:

Using the DISPLAY USER record:

The screenshot shows the 'Display User' interface for user SAWYER, ERIC ALAN. The user ID is 22612000814752. Under the 'Checkouts' tab, there is one checkout record for '21 great stories' with item ID 132612600807916, checked out on 9/22/2009, and due on 10/20/2009. A context menu is open over this record, listing various actions. The 'Mark Item Lost' option is circled in red.

Title	Item ID	Date Checked Out	Date Due	Status	Type
21 great stories	132612600807916	9/22/2009,13:28	10/20/2009,23:59	Overdue	NONFICTION



Select "**Bill User**" (can edit item price, if desired, before billing):

WF Display User : Billing for Lost Item/Processing Fee

Billing user  
User ID: 22612000814752  
Alt ID: SAWYER, ERIC ALAN

For lost item  
Item ID: 32612010119372  
Title: 21 great stories  
Author: Lass, Abraham Harold, 1907- 808.8 21  
Price: \$5.19

Billing info  
Amount  
Lost item:  Payment type:   
Processing fee:

Item status is now *Claims Lost*.

Alerts

Photo Not On File

Name: SAWYER, ERIC ALAN  
Id: 22612000814752  
Homeroom: A127-YODER  
Profile name: STUDENT1...

Identify user  
User ID:

Summary | Addresses | Extended Info | Bills | **Checkouts** | Holds | Reservations | Suspension

Checkouts:1(\$5.00)

Title	Item ID	Date Checked Out	Date Due	Status
21 great stories	<u>32612010119372</u>	9/22/2009,13:28	10/20/2009,23:59	Claims lost

User has been billed for Lost Item:

Alerts

Photo Not On File

Name: SAWYER, ERIC ALAN  
Id: 22612000814752  
Homeroom: A127-YODER  
Profile name: STUDENT1...

Identify user  
User ID:

Summary | Addresses | Extended Info | **Bills** | Checkouts | Holds | Reservations | Suspension

Unpaid bills:3(\$11.19)

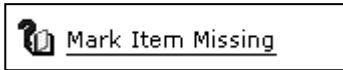
Title	Item ID	Reason	Owes	Billed	Date	Paym
20,000 leagues under the sea	32612100061138	OVERDUE		\$1.00	\$1.00	11/19/2009
20,000 leagues under the sea	32612100061138	OVERDUE		\$5.00	\$5.00	4/15/2010
21 great stories	32612010119372	LOST		\$5.19	\$5.19	7/2/2012

**All this has been done from the DISPLAY USER record.**

## Mark an Item as Missing

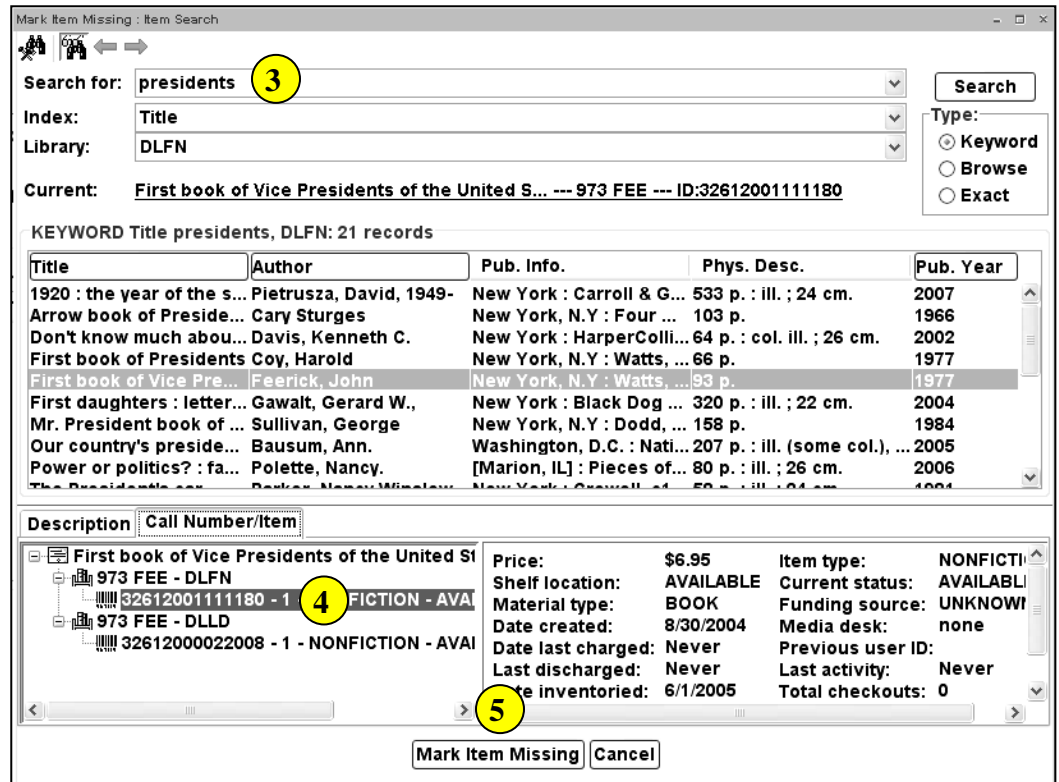
Your staff may decide that an item should be marked as missing if they can not find the item in the library but the **catalog says it is available** or if the item is long overdue and you don't want the item linked to the patron. Checking out the item to MISSING user status alerts staff and shadows (hides) the item in the on-line catalog, preventing futile efforts to locate this item.

1. **Click** on Item Maintenance Wizard group.
2. **Click** on Mark Item Missing Wizard.



*Mark Item Missing: Item Search* screen displays.

3. **Search for, scan, or type** in item barcode.
4. If more than one title displays, **select** the desired title. If more than one copy displays, **select** the desired copy.
5. **Click** Mark Item Missing button at the bottom of the screen or Cancel to cancel marking item missing.

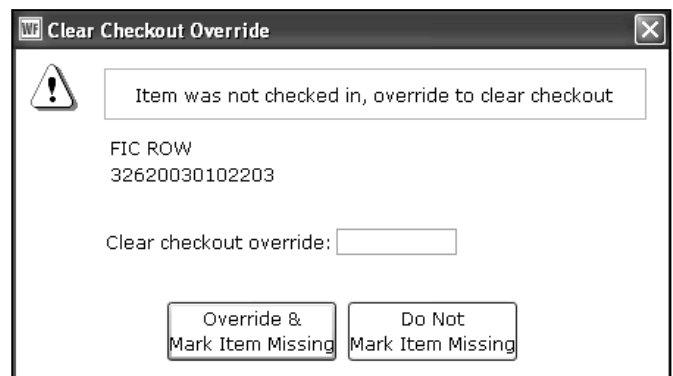


### Marking an Item as Missing When Checked Out to a User

If the item is checked out, the *Mark Item Missing Clear Checkout Override* screen displays.

Options:

- a. **Click Override** and Mark Item Missing. (enter your override password) This will remove this item/transaction from the patron record.
- b. **Do Not Mark** Item Missing. Use this option if you prefer to make the item lost and keep the item linked to the patron.



**Marking an Item as Missing if the Item has Holds**

If the item has a hold, the *Mark Item Missing: Holds Block Override* screen displays.

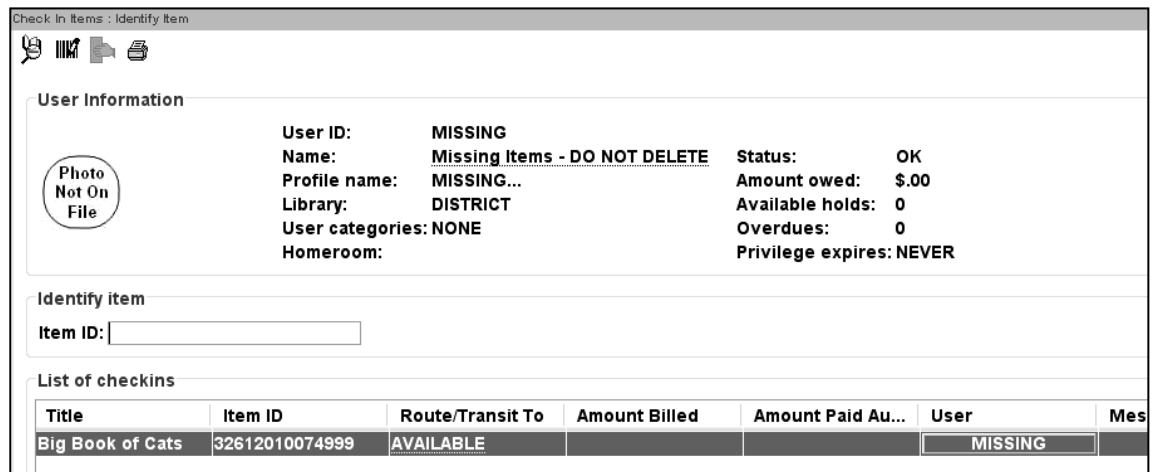
Options:

- a. **Override** and Mark Item Missing. (enter your override password)
- b. **Do Not Mark** Item Missing.



**Item is returned after Marked MISSING**

An item that is returned after being marked missing should be checked in with the check in wizard. This will return the item to the status of available.



**Note: For more detailed information or specific questions, use HELP wizard.**



1. **Click** on Item Maintenance Wizard.



2. **Click** on Mark Item Missing Wizard.

*Mark Item Missing: Item Lookup* screen **displays**.

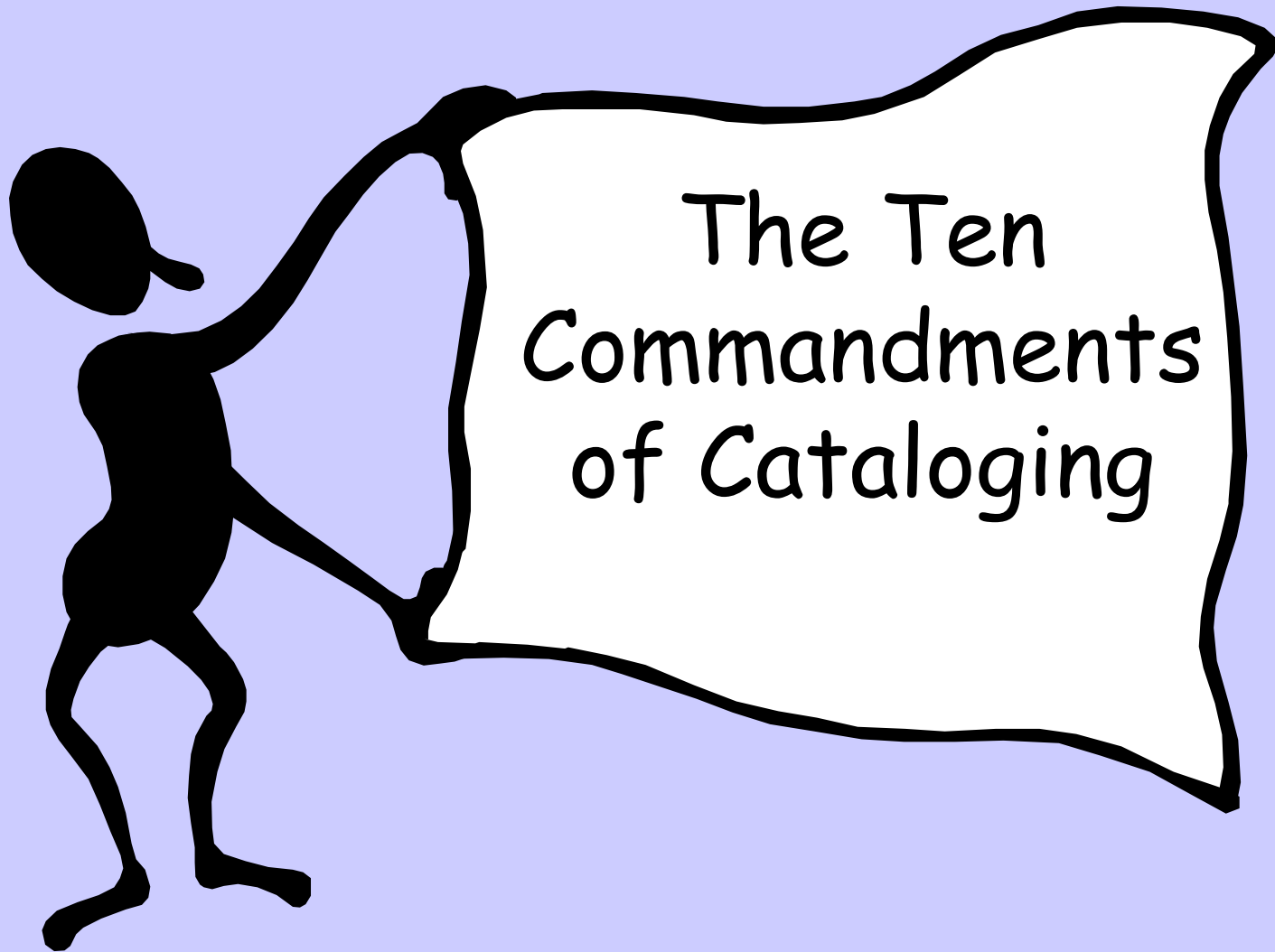
3. **Scan or type** in barcode or use the *Lookup Item Helper* button.

- If more than one title displays, **select** the desired title.
- If more than one copy displays, **select** the desired copy.

4. **Click** OK

*Mark Item Missing: Complete* screen **displays**.

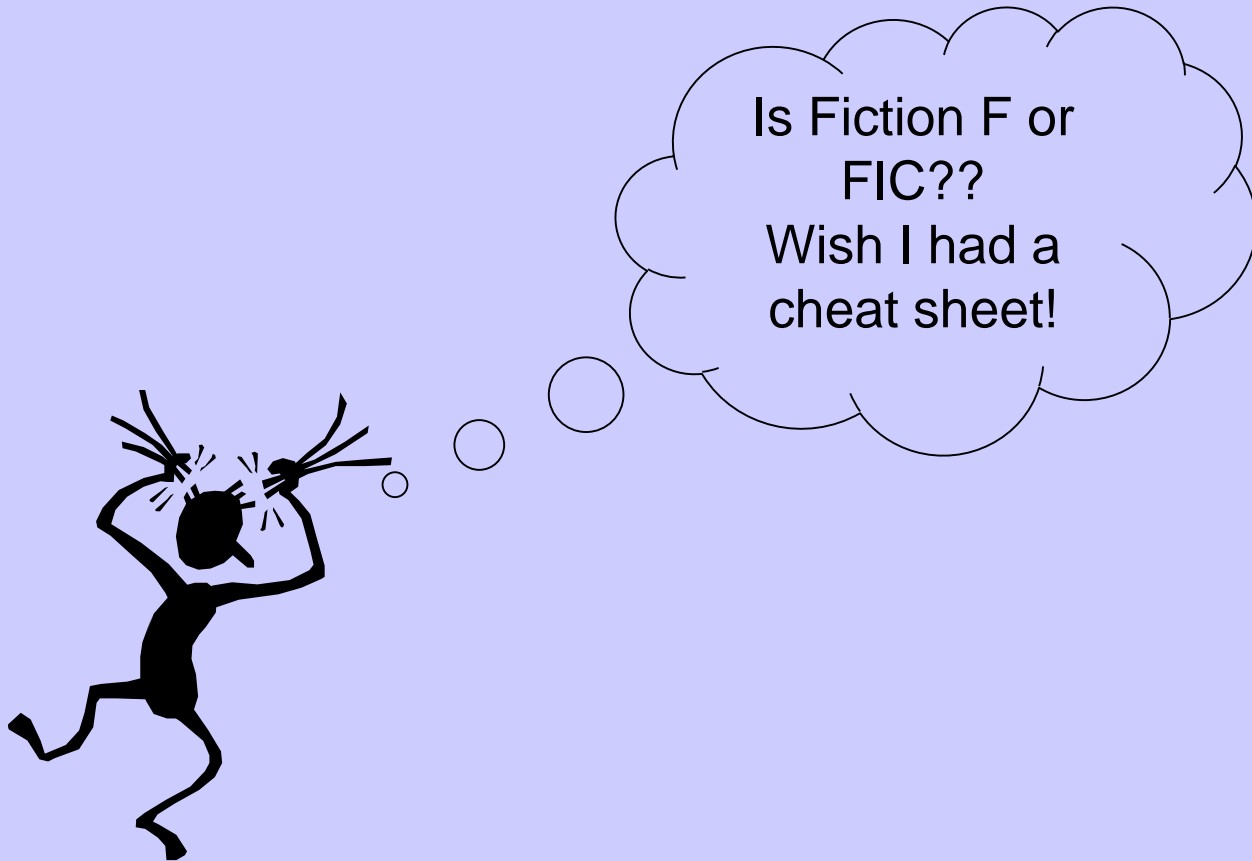
5. **Click** OK or Close button.



# I. Thou shalt follow the INFOhio cataloging method



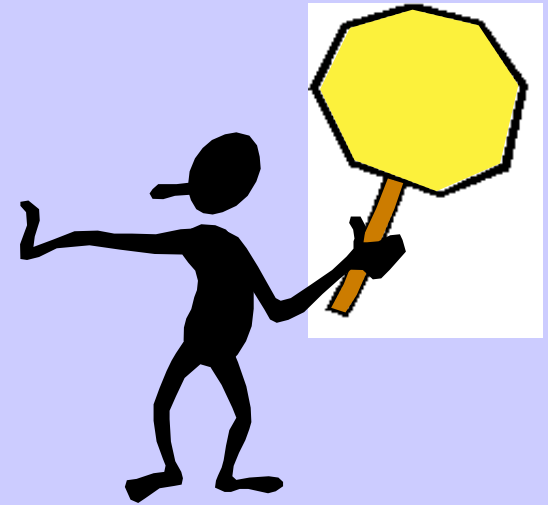
## II. Thou shalt be consistent in your cataloging.



III. Thou shalt search thy own database first for a matching record so as not to create duplicates.



IV. Thou shalt search INFOhio databases first before searching in World Cat.



Gateway name	Description	Selected
CRC	INFOhio Catalog (Free - try before OCLC)	<input checked="" type="checkbox"/>
LC	Library of Congress (Free - try before OCLC)	<input type="checkbox"/>
OCLC	WorldCat Subscription (use if no match in CRC/LC)	<input type="checkbox"/>
TEMPL	INFOhio Template (for Original Cataloging of Materials)	<input type="checkbox"/>

# V. Thou shalt use the Add Brief Title wizard if you can't find a record in SmartPort.

**\*\*REQUIRED FIELD\*\***  
XX(65988.1) ID:65988-1001

Title info

ISBN:	020			
Personal Author:	100	1		
Title:	245			<b>**REQUIRED FIELD**</b>
Publication info:	260			
Physical descrip:	300			
INFOhio template:	989			Brief Record

Call number and copy info

New call number: XX(65988.1)

Library: STMES

Item group: NONFICTION

Shelf location: AVAILABLE

Item ID: 65988-1001

Material type: BOOK

Funding source:



Keep  
searching  
for a better  
record.

# VI. Thou shalt use Local Templates only for locally produced materials.



- Yearbooks
- School publications
- School videos, DVDs

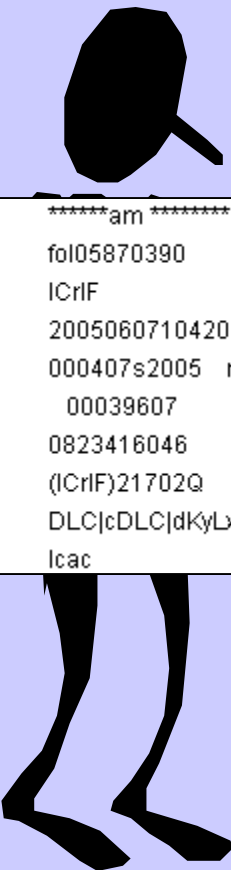


VII. Thou shalt use Original Record Templates for commercially produced materials that don't have records available via SmartPort.

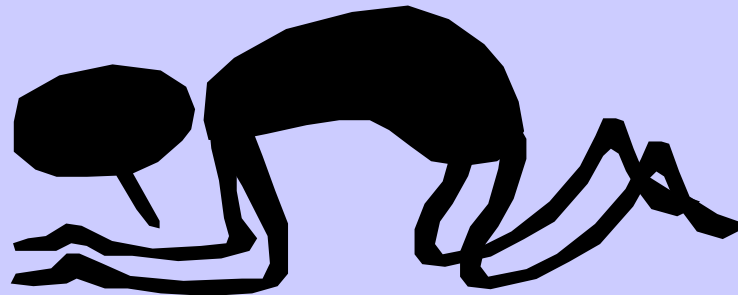


Finally! An easier way to create a bib record!

# VIII. Thou shalt respect the MARC record.



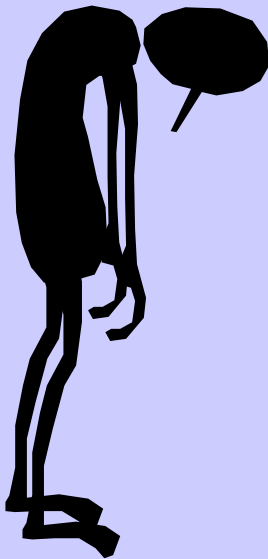
000 \*\*\*\*\*am \*\*\*\*\* a\*\*\*\*\*  
001 fol05870390  
003 ICrIF  
005 20050607104201.4  
008 000407s2005 nyua b b 000\*0beng  
010 00039607  
020 0823416046  
035 (ICrIF)21702Q  
040 DLC|cDLC|dKyLxBWl|dICrIF  
042 lcac



IX. Thou shalt follow the documentation carefully - don't get creative!

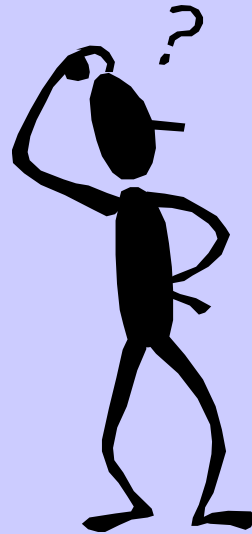


X. Thou shalt be humble: you don't know what you don't know!



The MARC record is a complicated, but logical thing. Everything in it is there for a reason, even if you don't know why!

You don't need to memorize all the tags, subfields, and delimiters, just realize they're there for a reason.



# Here are some examples:

This record has the date as well as other info in the leader entered incorrectly.

Fleas : bloodsucking parasites / Llamas, Andreu.

Control Bibliographic | Call Number/Item | Bound-with |

Shadow title

Rec_Type	a	Bib_Lvl	m	TypeCtrl		Enc_Lvl	
Desc	a	Entrd	9612	Dat_Tp	s	Date1	1997
Date2		Ctry	wiu	Illus	ab	Audience	
Repr		Cont	j b	GovtPub		ConfPub	
Festschr		Indx	0	Fiction	1	Biog	
Lang	0 e	Mod_Rec	n	Source	g		

▲▼

	Tag	Ind.	Contents
▼	001		CCE96603352
▼	003		KToSCC
▼	005		20001019112838.0
▼	010		96046932 /AC
▼	020		0836816501
▼	040		DLC cDLC dKToSCC
▼	050	00	QL599.5 b.L5313 1997
▼	082	14	595.77 212
▼	100	1	Llamas, Andreu.
▼	245	10	Fleas : bbloodsucking parasites / cby Andreu Llamas ; ill. by Gabriel Casadevall and Ali Garousi.
▼	260		Milwaukee, WI : bG. Stevens, c1997.

Should be YYMMDD

As a result, the Shelflist report showing publication dates is wrong.

INFOhio :: CAT : Shelf List (catitemlist - brief)

Pub. Year	Call Number	Barcode	Status	Title
3001	PB N	30488100648253	AVAILABLE	Nobody's th
3001	PB N	30488100648261	AVAILABLE	Nobody's th
3001	PB N	30488100650861	AVAILABLE	Nobody's th
8603	PB Z	30488100435339	AVAILABLE	The pigman
8603	PB FIC ZIN	30488030658935	AVAILABLE	The pigman
8603	PB FIC ZIN	30488030618863	AVAILABLE	The pigman
8603	PB FIC ZIN	30488030670302	AVAILABLE	The pigman
8603	FIC ZIN	30488080201313	AVAILABLE	The pigman
8606	PB V	30488100435289	AVAILABLE	Homecoming
8606	PB V	30488100609396	AVAILABLE	Homecoming

# Another example - Series search

When the number in the series is entered with no subfields, a hyperlink search only results in other records for the same number.





440 0 Baby-sitters little sister #109

Series : [Baby-sitters little sister #109](#)

Your search for "se "Baby-sitters little sister #109"" found 2 matching records (of 2 retrieved thus far).  
Your final result set will contain an estimated 2 records.

[Full Record List](#) | [Summary Search Results](#) | [Refine Search](#) | [View Your Book Bag](#) | [Add All Items to Book Bag](#)

Unsorted

	1. <a href="#">** Karen's show and share / Ann M. Martin ; illustrations by Susan Crocca Tang. Martin, Ann M., 1955-</a>		
	LEECA High School - Fiction Collection	FIC MAR	Available
	2. <a href="#">Karen's show and share / Ann M. Martin ; illustrations by Susan Crocca Tang. Martin, Ann M., 1955-</a>		
	LEECA Elementary School - Paperback Collection	PB F MAR	Available



# When the number is entered correctly in subfield v, the whole series will display.

440 0 Baby-sitters little sister ;|v#109






Series : Baby-sitters little sister ; #109

Your search for "se "Baby-sitters little sister ;"" found 29 matching records (of 29 retrieved thus far).  
Your final result set will contain an estimated 29 records.

[Full Record List](#) | [Summary Search Results](#) | [Refine Search](#) | [View Your Book Bag](#) | [Add All Items to Book Bag](#)

Result Pages: [[<< prev](#)] 1 [2](#) [3](#) [[next >>](#)]

Unsorted

	1. <a href="#">** Karen's show and share / Ann M. Martin ; illustrations by Susan Crocca Tang. Martin, Ann M., 1955-</a>	LEECA High School - Fiction Collection	FIC MAR	Available
				
	2. <a href="#">Karen's show and share / Ann M. Martin ; illustrations by Susan Crocca Tang. Martin, Ann M., 1955-</a>	LEECA Elementary School - Paperback Collection	PB F MAR	Available
				
	3. <a href="#">Karen's president / Ann M. Martin ; illustrations by Susan Crocca Tang. Martin, Ann M., 1955-</a>	LEECA Elementary School - Fiction Collection	F MAR	Available

## The INFOhio Cataloging Method

Ordering records from a vendor (or jobber) might be your first step. Please be sure to include the INFOhio Vendor Specification document with each order. (Spec sheet is found in handbook: Basic Cataloging).

Following the INFOhio recommended cataloging procedure will eliminate the need for original cataloging. You will be looking for bibliographic records that match your item and then adding item specific details to the record. The Tip Sheet (Matching Records) may be helpful in determining if a record matches your item.

1. **Check your local database** for a matching record.
  - Use the Call number and Item Maintenance Wizard.
  - Do a title search for your item. Search ALL\_LIBS. If you don't get a hit, then try ISBN or author.
  - If you find a matching record, determine if you need to add a call number or just an item to the record.
    - a. Add a Call number if:
      - i. There are no items on that record in your library.
      - ii. There are items in your library, but they have a different call number than you want for this item.
    - b. Add an Item if:
      - i. There is already an item with the call number you need in your library.
  - If cataloging equipment or locally produced items (PTA newsletter, yearbook, etc.) follow the directions for using Local Record or Equipment Record templates in Section 11.
  
2. If you can't find a matching record in your local database, **use SmartPORT** and select the appropriate database to locate a record.
  - **CRC** – this is the INFOhio catalog of MARC records, updated weekly with records from INFOhio libraries around the state. **Use this catalog as your first search choice.**
  - **LC** – Library of Congress – this only contains records of items published in the U.S. Typically, you will find your “older” items here. Use this catalog as a first search, if applicable.
  - **OCLC** – OCLC WorldCat is available via SmartPort and allows unlimited access to the largest selection of MARC records in the world. **Search separately after finding no matches in CRC or LC.** Including OCLC Worldcat database in your search, even if not taking any records, is still considered as "use" by OCLC and will drive up INFOhio's statewide use and costs. We want to continue being able to offer OCLC Worldcat access in the future, so we hope you understand the importance of **first searching for MARC records in the free sources.**

When you find a record that matches your item, import it. Then add your item information.

3. If these resources have failed to produce a matching record, you may wish to **create** a temporary record.
  - Use the **Add Brief Title** wizard from the Item Maintenance wizard group to create a temporary record.
  - Continue to search for a full MARC record to replace the brief record.
  
4. If you have not found a record yet, you can create a full record using the INFOhio templates for commercially produced materials. Import the appropriate template – the leader will be correctly entered for you. Then continue to catalog your item. *Follow directions from Cataloging with Templates section of handbook.*

## INFOhio Vendor MARC Record Specifications

District: \_\_\_\_\_ School: \_\_\_\_\_

Address: \_\_\_\_\_ Phone: \_\_\_\_\_

Submitted By: \_\_\_\_\_ Date: \_\_\_\_\_

**Dear Librarian:** Use this form to assist you in providing information to vendors for the production of MARC records and barcodes. The information in this document should adequately answer any questions vendors may pose regarding specifications for MARC records and/or barcodes. Because some vendors of barcodes and MARC records may provide books which are processed to your specifications as well, there may be additional specifications required by the vendor which you must fill out for those purposes. Those specifications are not part of this form. Please be sure to specify if you are ordering titles for your reading program so your location code is included in the 526 tag.

**Dear Vendor:** The following is for the standardization of MARC records for INFOhio and is intended to assist the librarian in communicating clearly with you, the vendor. These are the established standards for the state of Ohio for participants in the INFOhio library automation project. The only client specific specifications are those entered by the librarian in the blank spaces below.

Records must adhere to ISBD and AACR2 standards. If records do not adhere to these standards, that fact must be **clearly** stated.

USMARC Communication Format (Item data to be in tag 852 per instructions below that are consistent with Microlif Protocol - 1991.)

Smart Barcode: 14 digit; Code 39; Modulus 10, type 1 check digit.

First digit to identify item:                     3  

District Institution code (digits 2-5):       \_  \_  \_  \_  

Sequential number range (digits 6-13):    from   \_  \_  \_  \_  \_  \_  \_  \_   to   \_  \_  \_  \_  \_  \_  \_  

**Digit 14 is vendor calculated (Modulus 10, type 1 check digit)**

First line of text on barcode to identify the school district or school building: \_\_\_\_\_

Second line of text for name of school building or building address:                   \_\_\_\_\_

System interface: INFOhio: SirsiDynix

Character set: ASCII

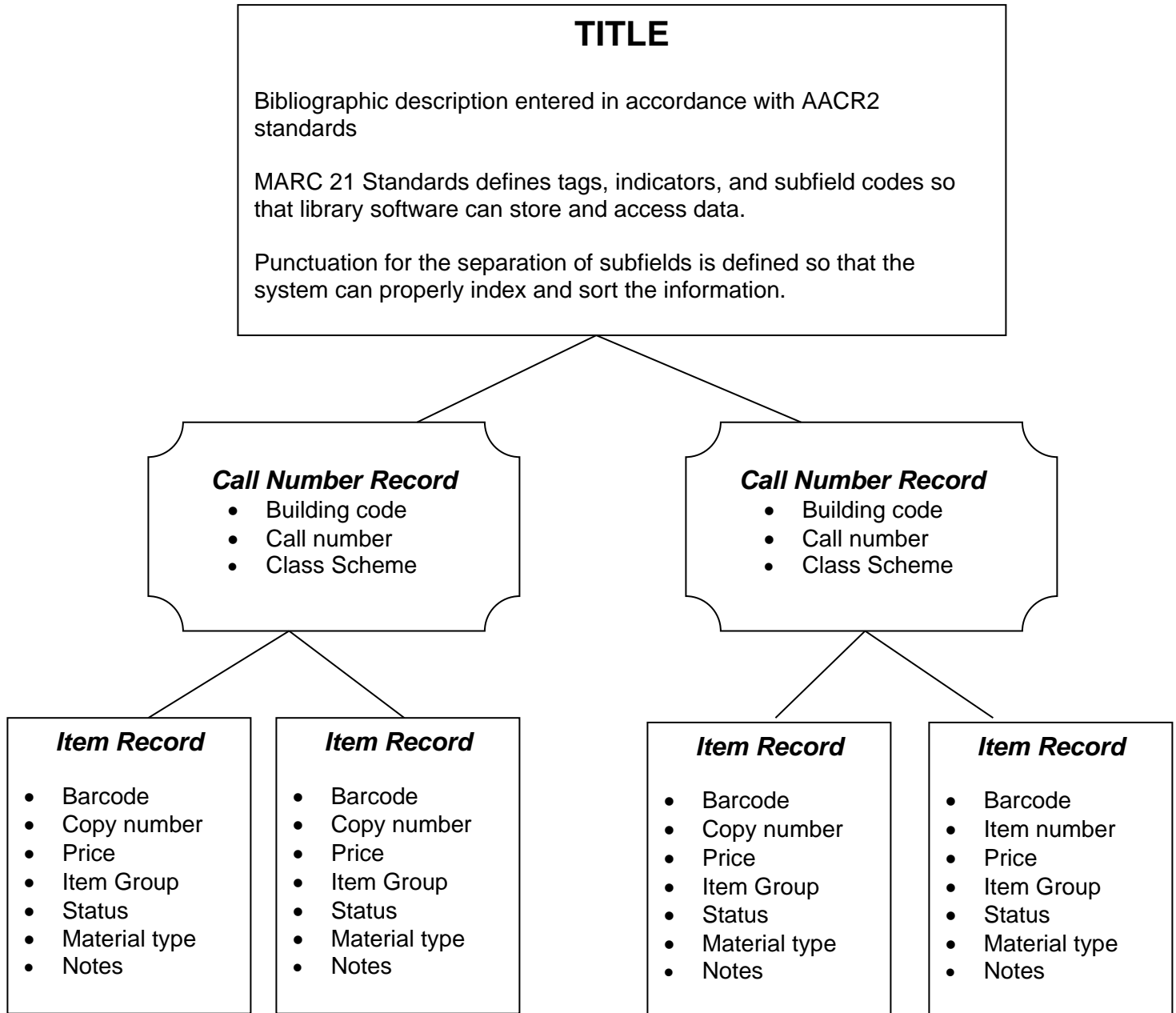
Provide file as checked: CD-ROM   \_      On-Line   \_  \_  \_  \_  \_  \_  \_      email delivery   \_  \_  \_  \_  \_  \_  \_  

Holdings data:	ITC abbreviation _____:	852 subfield	<b>a</b>
	General location code _____:	852 subfield	<b>b</b>
	<b>DO NOT USE</b> Shelving location	852 subfield	<b>c</b>
	Call number (including volume &/or copy):	852 subfield	<b>h</b>
	Copy <u>number only</u> :	852 subfield	<b>t</b>
	Volume <u>number only</u> :	852 subfield	<b>j</b>
	Barcode number:	852 subfield	<b>p</b>
	Price:	852 subfield	<b>9</b>
	<b>DO NOT USE</b> Nonpublic note	852 subfield	<b>x</b>

If the data is provided, please place in the standard USMARC tag as indicated below.

	<u>Tag</u>	<u>1st indicator</u>	<u>2nd indicator</u>	<u>Subfield</u>
Reading Program	526	0	blank	a Program Name b Interest Level c Reading Level d Point Value
Lexile level (be sure to include first indicator)	521	8	blank	a Target audience note b Source
Review Sources (Repeat this tag for multiple sources)	510	3	blank	a Name of Source c Location in source
Awards (Repeat this tag for multiple awards)	586	blank	blank	a Awards note

# Cataloging Record Structure



## Cataloging Helpers

**Cataloging Helpers will appear on appropriate screens as you perform cataloging functions. Only helpers that function from a specific screen will display.**

### 1. Show/Hide Search Pane Helper

Search Pane – Contains the Search edit box. This pane also provides search type, search index, and search library options. If there is an existing current title, it will display next. This pane also contains the type of search you want to perform, Keyword, Browse or Exact.

### 2. Show/Hide Viewer Helper

Viewer Pane – Displays the list of matching records after you perform a search. A summary statement of your search results appears at the top of the Viewer Pane. Depending on your search results or the type of search you are performing, a Browse list may display. Hit lists will appear on Headings and/or Records tabs. Selected entries on the Headings or Records tab cause the record's Description, Call Number/Item, Bound-with Information, and possibly other tabs, such as Order Information, to display.

### 3. Show/Hide Circulation and Extended Information Helper

When using the Item Search window, the Show/Hide Circulation Information helper is available. The Show/Hide Circulation Information Pane helper is a toggle helper. That is, this helper can turn the Circulation Information area on (show) or off (hide).

In the Item Search window, the Circulation Information area displays item circulation information about the selected title. Item circulation information might include price, item type, home location, current location, and item categories, date created, date charged, and so on.

To turn the Circulation Information area on or off, click the Show/Hide Circulation Information helper.

### 4. Show/Hide Tree Information Viewer

Bound-with Tree Pane – Contains the title you selected to be linked. The Bound-with tree displays a hierarchical structure (tree view) of the title record and its call numbers and items. You can expand (click a plus sign) or collapse (click a minus sign) the structure to make it easier to use. Clicking the plus sign next to the title record displays its call numbers and items. The tree uses icons to indicate a title record, call number record, and item.

### 5. Set Option for Item Lookup

Use the Set Options for Item Lookup helper to qualify the search method you have selected to conduct the search. The following item lookup options are available. Select a folder tab to see the options.

Search

Browse  
Display (Exact)

FYI: Sort By

The Search or Browse lookup results will be sorted by the selected criteria. The following sort options are available.

If a sort order is not selected, results display in the order that they were entered into the catalog or last modified.

**Author** sorts by the first occurring author field in the record. Titles that do not include an author display first in the list. Main entry (1xx) and added entry (7xx) authors are combined in the sort.

**Title sorts** by the title statement (245) entry.

**Subject** sorts by the first occurring subject field in the record. All subject heading types, including topics, names, titles, and geographic headings (6xx) are combined in the sort.

**Pub Year** sorts with the earliest published titles first.

**Reverse Pub Year** sorts with the most recently published titles first. Modifications to these folders are retained until another wizard is selected. If your search does not return results, a message will suggest that your lookup options are too restrictive.



## 6. List the Catalog by Call Number Helper

The List the Catalog by Call Number helper is used to display all of the call number records in your library's system, which share the same call number or portion of a call number. This feature is useful when assigning call numbers and finding materials using specific class numbers.

You may display the catalog by call number at any time when using the wizard. Enter the call number or portion of call number that you want to search in the Start List With field. Do not enter any truncation symbol for a call number portion, but be sure to properly capitalize and punctuate the call number you enter. Any call number that includes the text will be retrieved. The records that are retrieved may not be displayed in call number order.

Example:

If you listed the catalog for call numbers including KF4, a sampling of call numbers would be listed in the following order.

KF410 .K9  
KF4114 .D76

**NOTE:** To browse only your own library collection in shelf list order, browse by call number using the tem Lookup. After a list is retrieved, you may select to view the bibliographic, volume, and copy information, look up another call number, or close the helper.



## 7. Display Bibliographic description

The Display Bibliographic Description helper is used to display bibliographic, call number/item, and order information about the current item.

Bibliographic Information

Under Bibliographic Information, the following information may appear.

LCCN  
ISBN

Author  
Title  
Publication Information  
Physical Description  
Subject Term  
Holdings statement

**NOTE:** *The bibliographic information that appears depends on the entries defined in your All, Brief, or Full entry templates for the format being displayed.*

Under Call Number and Item Information, the following information appears.

Title's call number  
Number of items  
Holding library  
Items  
Item IDs  
Item types  
Current locations  
Whether or not the item can circulate  
Number of current holds  
Item extended information, such as staff and public notes

## 8. **Modify Selected Items Helper**

The Modify Selected Items helper allows you to search for items by title, and then select the items you want to modify.

Click the **Modify Selected Items** helper. The Item Search window appears.  
Use Item Search to search for the title you want. If a Current record exists for the item, click the Current information link to access the last record displayed, modified, or added.  
If your search finds results, a list of matching records display in the hit list area. Select the record you want to display. The selected title displays in the Viewer pane on the Call Number/Item tab.  
To modify all items at once, select the check box next to the title record.  
To modify individual items, select the check box next to each item you want to modify.  
Click **Next**. The item values you want to modify appear.  
Click **Modify** to apply the global modifications.  
-Or-  
Click **Cancel** to return to the Global Item Modification wizard.

## 9. **Show Valid 852 Locations Helper**

This helper displays only when a MARC Holdings record is displayed for modification. You can modify MARC holdings when you are working with either catalog records or serial control records.  
Click the Show Valid 852 Location helper.  
In the Valid 852 Locations list, select the 852 location you want, and then click OK to copy the 852 location text you selected to the Windows Clipboard.  
Click the place in the 852 entry where you want the information to appear, and then press CTRL+V to paste the text in the 852 entry line.

After you have pasted the text, your 852 entry might look something like this: |cSTACKS  
Click **Save and Close** to save your changes or **Close** to close this helper without saving any changes.  
**Note** The 852 locations that display in the Valid 852 Locations list are Location policies, which are valid in the MARC Holdings record, for your library.



## 10. Validate Headings

The Validate Entries helper allows you to check bibliographic headings under authority control and to validate indicators and subfields. This helper displays only in wizards that permit modification of the bibliographic record in the Bib folder.

**NOTE:** *The Validate Headings helper saves any changes to the bibliographic record before beginning.*

With the Validate Entries helper, you may be prompted to verify tags under the following circumstances. The indicators do not meet the parameters defined in your entry list. Use the verify list to select indicators that are valid for that entry. To display valid indicators for the second indicator position, you must place your cursor on the second position before selecting the verify list.

**NOTE:** *In many cases, entries do not have any valid indicators. If the verify list does not display data, there are no valid indicators defined for that position.*

Authority headings in author (1xx, 7xx), series (4xx) or subject (6xx) tags are unauthorized. Use the Browse Authority gadget to validate the heading.

After reviewing the displayed indicator or heading problem, take one of the following steps:

- OK the changes to validate the entry. If the change made to the indicator or entry is valid, the OK will advance to the next entry in the list. If the changed indicator or entry cannot be validated, it will continue to display as the current entry until it is either corrected or skipped. Invalid or skipped entries continue to display the next time the validate entries helper is invoked.
- Skip the indicator or entry displayed without making changes or validating the change.
- Skip all subsequent invalid indicators and unauthorized entries for the title without making additional changes.

**NOTE:** *If the behavior properties in the Validate Headings helper are not configured to skip unauthorized headings, the Skip and Skip Rest buttons do not display.*

**NOTE:** *The Validate Headings helper will not display in cataloging wizards unless the system is configured for authority checking.*



## 11. Shadow Options

This helper governs the display of items in the shadow catalog. In the Item Search and Display wizard, or any process of reviewing a record, this helper is referred to as the Shadow Levels helper, and displays the information without allowing edits.



The library may want to hide or "shadow" records, which cannot be used by patrons, such as lost or missing volumes/copies or titles still being cataloged by technical services. The shadow options permit catalog, call number, and copy records to be searchable only by library staff.

**NOTE:** *A Location policy may also be defined as a shadow location, so any item with a shadowed current status will display as a shadowed copy. Once a shadowed location is created, its shadow status cannot be modified.*

When the Shadow Options helper is selected, the shadow options that display are based on the level of record that you are working with. If you are creating or editing a title and your properties allow, you can shadow at the title, call number, and/or copy level. If you are adding or editing a call number, you can shadow at the call number and/or copy level. If you are adding or editing a copy, only the copy level shadow option will display. A shadow copy option will not display for a call number that does not have an attached copy.

If the item you are editing is already in the shadow catalog, the shadow options will display enabled.

- Enable the Shadow Title checkbox to prevent the title and all of the call numbers and copies associated with it from displaying to the public.
- Enable the Shadow Current Vol. checkbox to prevent the call number and all copies associated with it from displaying to the public.
- Enable the Shadow Current Copy checkbox to prevent the single copy from displaying to the public.

It is only necessary to enable the highest level of shadowing. However, a title being shadowed temporarily that should still have call numbers or copies shadowed when it is returned to the standard index should be shadowed at multiple levels.

The status of any of item can be changed so that it moves from the standard catalog index to the shadow catalog, or from the shadow catalog index to the standard catalog.

## 12. Insert a field Before the current one Helper



The Before helper can be accessed from commands that create hold, item, or user records or from commands that modify this information. The Before helper allows fields to be added before the field in which the cursor is positioned.

**NOTE:** If you don't want to use your mouse to select the helper to enter a new line, you may enter the key combination "Ctrl B" to enter a line after the field in which the cursor is positioned.

## 13. Add a field After the current field Helper



The After helper can be accessed from commands that create hold, item or user records or from commands that modify this information. The After helper allows fields to be added after the field in which the cursor is positioned.

**NOTE:** If you don't want to use your mouse to select the helper to enter a new line, you may enter the key combination "Ctrl A" to enter a line after the field in which the cursor is positioned.

14. **Append a field Helper** 

In addition to adding fields, you can also append a field to a record. When you append a field to a record, Unicorn adds the new field at the end of the record.

Position your mouse pointer anywhere in the Editor window, and then click the **Append Field** helper.  
-Or-

Right-click anywhere in the Editor window to open the shortcut menu, and then click **Append Field**. Type the field you want to add. Unicorn adds the new field at the end of the record.

15. **Delete the current field Helper** 

While editing a record in MARC View you can delete the current field from the record. In MARC 21 format, you cannot delete the LDR and 008 fields.

Position your mouse pointer on the field you want to delete.

Click the **Delete** helper.

-Or-

Right-click to open the shortcut menu, and then click **Delete Field**



















The Delete helper can be accessed from commands which modify hold, item, or user information. The Delete helper allows an entry to be deleted.

**NOTE:** The Delete helper may display either on the right or left hand side of the window.

16. **Change Display Library helper** 

In multi-library systems, while editing an item in all Cataloging wizards that have a Call Number/Item tab, you can select to view only items for a specific library.

**Cataloging Helper icons** which display on cataloging windows.

	Show search pane helper		Validate headings helper
	Show/hide viewer helper		Shadow options helper
	Show/hide circulation and extended info helper		Insert a field BEFORE the current one helper
	Show/hide tree information viewer		Insert a field AFTER the current one helper
	Set option for item lookup		Append a field helper
	List catalog by call number helper		Delete the current field helper
	Display bibliographic description		Print labels helper
	Modify selected items helper		Print preview labels helper
	Show valid 852 locations helper		Change display library helper

## Cataloging Properties

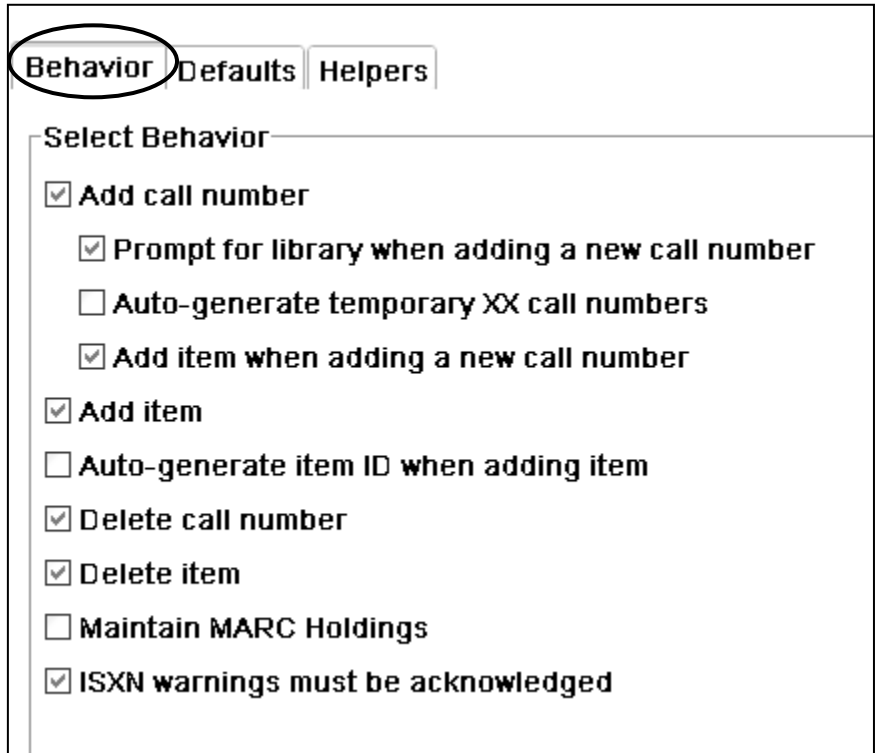
The Call Number / Item Maintenance, Add Title, Duplicate Title, and Modify Title wizards allow the following properties to be set (Behavior and Helpers set by Administrator or Supervisor level access). Default properties can be set by the user on their workstation. (See *SET PROPERTIES guide in Setup/Getting Started section of handbook*)

**NOTE:** *The options available will vary slightly depending on the wizard selected.*

### Behavior

The Add Call Number property is enabled to allow the addition of items to the new title at the end of the wizard. This property must be enabled to utilize the Prompt for Library when Adding New Call Number field. The following fields affect the added call numbers.

- Prompt for Library when Adding New Call Number, which is delivered enabled.
- Auto-generate Temporary XX Numbers, **which is delivered disabled.**
- Add Copy when Adding New Call Number, which is delivered enabled.



**Behavior** Defaults Helpers

Select Behavior

- Add call number
  - Prompt for library when adding a new call number
  - Auto-generate temporary XX call numbers
  - Add item when adding a new call number
- Add item
  - Auto-generate item ID when adding item
- Delete call number
- Delete item
- Maintain MARC Holdings
- ISXN warnings must be acknowledged

The Add Item property is enabled to permit the addition of items within the wizard and as one of the steps at the end of the wizard.

The Auto-generate Item ID when Adding Item property, which is delivered disabled, automatically assigns new item IDs when any copy is added. Contact your ITC to have this turned on for you.

Delete Call Number – Allows deletion of call numbers in the wizard.

Delete Item – Allows deletion of items in the wizard.

Maintain MARC Holdings – Allows working with MARC Holdings information. **This is delivered disabled.**

ISXN Warnings Must Be Acknowledged – Displays ISBN or ISSN validation warnings when an incorrect ISBN/ISSN is entered. You will have the opportunity to correct the ISBN or ISSN or acknowledge the warnings and continue. The dialog displays separate lists for invalid ISBNs and invalid ISSNs.

## Defaults

The Show These Values field governs the display of the Defaults properties page while working with the wizard. The delivered default displays the properties page only when the wizard is started.

### Default Values

1. Sirsi is delivered with the title defaults:  
Format - MARC  
Entries template - FULL  
Add item when creating a title.

You can also enable the Shadow Title field if you want to shadow a title as it is created.

2. Editor display options are delivered with descriptive view enabled.

3. Call number/Item default values – **a library should be set.**  
If not, the library defaults to the library associated with the user logged in.  
Be sure to leave class scheme at ATDEWEYLOC.

4. Item required default values are delivered with Type as NONFICTION.  
Shelf Location default value is delivered as AVAILABLE.

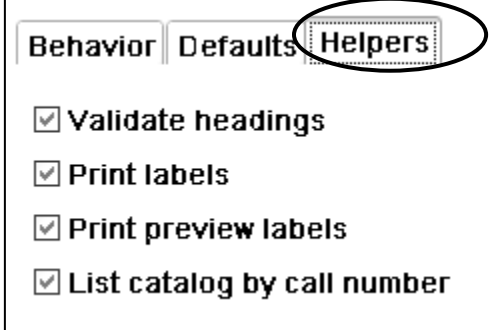
The Permanent field indicates whether the item is part of your library's permanent collection, the Circulate field controls whether a system-generated circulation rule can be overridden, and the Shadow Item field determines whether the item will be shadowed. The Permanent and Circulate fields are delivered enabled. The Shadow Item is delivered disabled.

5. Item optional default values can be preset if you like. You can enter price and funding source.  
Material Type – default delivered is BOOK

## Helpers

The helpers are all delivered enabled -  
Validate Headings, Print labels, Print preview labels, and list  
catalog by call number.

**NOTE:** *The Validate Headings Helper property will not display  
unless authority checking is configured.*



Behavior Defaults **Helpers**

- Validate headings
- Print labels
- Print preview labels
- List catalog by call number

**Note:** For more detailed information or specific questions, use HELP wizard.

**Class Scheme**  
(Shelving Scheme or Shelving Key)

This policy name identifies the call number's classification scheme. The Class Scheme automatically generates the correct shelving key based on the Class Scheme policy which defines capitalization rules, sorting rules, and ascending or descending order. The shelving key takes the call number and, depending on the sort rule, adds zeros and spaces to different parts of the number or number/letter string.

The following sort rules are used with class schemes.

Name	Definition	Example
<b>AT Dewey with Location*</b> <i>*(Recommended)</i>	AT Dewey with Location, used with ATDEWEYLOC classification, is for Dewey call numbers sorted by author and title and preceded by a location. The location is read as entered, the fiction indicator is expanded to three letters, and 3-letter author and title cutters are provided if needed. Any numerals in the call number are expanded to six digits (zero filled).	A call number of JUV F CLE produces a shelving key of JUV FIC CLE JAN for the Beverly Cleary's book Janet's Thingamajigs in the juvenile JUV collection. The location letters are left as is. The next letters are the fiction marker and are expanded to three characters. The 3-letter cutter for the title is added. The same item with the call number J FIC CLE JAN produces the shelving key J FIC CLE JAN. The expansion and the cutters are not necessary. The call numbers LP F MIT HAW V.1 and LP F MIT HAW V.2 represent the Large Print edition of James Mitchener's Hawaii. The shelving keys are created as: LP FIC MIT HAW V.0000001 and LP FIC MIT HAW V.0000002. The numerals in the volume statement expand to six digits.
<b>ASIS</b>	ASIS means "as is." It sorts the call number exactly as it is entered. LC or Dewey call numbers do not sort properly with ASIS, but it is appropriate for other kinds of call numbers or accession numbers.	AV equipment serial numbers like S/N 23456-981 would sort exactly as entered into the call number field.

---

AT Dewey	<p>AT Dewey, used with ATDEWEY classification, is for Dewey call numbers sorted by author and title. A 3-letter title cutter or both a 3-letter author and title cutter may be added to the existing call number. A cutter is not added if it already exists in the call number. Any numerals in the call number are expanded to six digits (zero filled).</p>	<p>A call number of FIC produces a shelving key of FIC DUN TWO for Dominick Dunne's book The Two Mrs. Grenvilles. A call number of F STE produces a shelving key of F STE DAD for Danielle Steel's book Daddy.</p>
<hr/>		
Dewey	<p>Dewey, used with DEWEY classification, sorts Dewey Decimal nonfiction call numbers. This rule assumes that the first numeral encountered is the classification code, and expands the numeral to three characters. Any preceding letters are location marks to be ignored. Letters after the classification numeral group are to be left as is. Numerals after the classification group expand to six digits.</p>	<p>A call number of 133.69 BIL produces a shelving key that looks the same:133.69 BIL.</p> <p>A call number of B 92 LIN produces a shelving key of B 092 LIN. "B" is assumed to be a location marker and is left as is. The first numeral in the call number expands to three digits.</p> <p>A call number of REF 811.42 RUK 1991 produces a shelving key of REF 811.42 RUK 001991. The date "1991" becomes "001991" when expanded to six digits.</p>

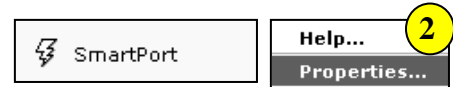
**Note: For more detailed information or specific questions, use HELP wizard.**



## SmartPort Properties

SmartPort allows dynamic capture and loading of MARC bibliographic and authority records from a Z39.50 server directly into the library's catalog. SmartPort properties should be set the first time the wizard is used.

1. **Click** on Cataloging Wizard Group.
2. **Right-Click** on SmartPort wizard, **select** Properties



### Bibliographic Record Load Options

3. The **Replace current record** option will confirm that you want to overlay any bibliographic (or authority) record that is **displayed, selected, or in memory** in the staff client workstation.

**NOTE:** *Caution is recommended when using this option!*

4. **Match and load** - will use the match points to determine whether any record in the catalog matches the one that is being captured. If any does, you will be notified before it is displayed to be replaced. **This option is selected by default.**

5. **Match on title control number** - The record is considered a match only if the control number matches a title control number found in one of the Title Control Number Source fields.

6. **Match on Title Control Number OR Indexed MARC Tag** – The record is considered a match if the title control number matches one of the specified Title Control Number Source fields in the imported record, **or** if one of the standard matching numbers from the incoming record as listed in the Indexed MARC Tag Number field finds a match in an existing SirsiDynix Symphony database index.

7. **Match on Title Control Number AND Indexed MARC Tag** – The record is considered a match if the title control number matches one of the specified Title Control Number Source fields in the imported record, **and** if at least one of the standard matching numbers from the incoming record as listed in the Indexed MARC Tag Number field finds a match in an existing database index. **This option is selected by default.**

SmartPORT : Properties

Display property page:  Wizard Startup  Never

**Recommended settings**

MARC Import

Bibliographic Record Load Options

4  Replace current record

7  Match and load

Match on title control number

Match on title control number or indexed MARC tag

8  Match on title control number and indexed MARC tag

Title control number source: oisl

9 Indexed MARC tag number: ils

10 Call sources: ATDEWEYLOC,949,,

11 Library: [dropdown]

Format: MARC

13 Remove subject headings: 2356

Authority Record Load Options

Replace current record

Match and load

Authority control number source: [dropdown]

14 Verify options:  Yes  No

Strip junktags:  Yes  No

Script for special processing: [text box]

Hit limit for brief display

Single server limit: 20

Multi-server limit: 5

Browse terms limit: 8

Gateway timeout: 20 Seconds

Formatted full display:  Yes  No

15 OK Cancel

To load as new record (no overlay) use k instead

8. **Title control number source (LOWERCASE)** – recommended matches are “**oisl**” (case-sensitive) – (OCLC number, ISBN number, SSN number, LOC number). Match will occur if OCLC number is present. If no OCLC number is present, load will continue looking for matching ISBN number; etc. If there is not a match, a **new record** will display to be accepted or modified. **These options are set by default.**

Title control number source:

List selected

- OCLC number (001)
- ISBN (020)
- ISSN (022)
- LCCN (010)

**NOTE:** *If, at the time of capturing the record, you wish to load it as a **new record**, insert “**k**” at the title control number source.*

9. **Indexed MARC tag number** – specifies which MARC tags will be used as match points.

Indexed MARC tag number:

List selected

- ISBN (020)
- LCCN (010)
- ISSN (022)

10. **Call sources (UPPERCASE)** specifies the source of call number information.

Enter **ATDEWEYLOC,949,,** (case sensitive)

Call sources:

**NOTE:** *This will create the “**AUTO-generated**” XX call number that is necessary to proceed.*

11. **Select** your Library code from the drop down menu, if not displayed.

12. **Format** default is MARC.

13. **Remove subject headings** - Allows you to specify the subject headings that should be removed, based on the 6XX second indicator values. **These headings, rarely needed with K-12 items, are set by default to be removed.**

Remove subject headings

List selected

- National Library of Medicine Subject Headings (2)
- National Agricultural Library Subject Headings (3)
- National Library of Canada Subject Headings (5)
- Répertoire des vedette-matière (6)

14. **Set remaining** properties as displayed (default settings).

- **Verify options, when selected**, will open these property settings at the point of importing the record, allowing changes to be made if needed.
- **Strip junktags, when selected**, will remove unnecessary tags (INFOhio determined – can be customized) from the imported record before loading it.

Verify options:  Yes  No  
Strip junktags:  Yes  No

15. **Click** OK.

**Bibliographic records loaded via SmartPORT will be created as title and call number records. Use the Call Number and Item Maintenance wizard to edit XX call numbers, add copies.**

**Note:** For more detailed information or specific questions, use **HELP** wizard

**SmartPORT Configuration Default Settings – SEE FULL DOCUMENTATION FOR DETAILS.**

- 1) **Click** on Cataloging Wizard Group.
- 2) **Right-Click** on SmartPort wizard, **select** Properties
- 3) **Replace current record** option will confirm that you want to overlay any bibliographic (or authority) record that is **displayed, selected, or in memory** in the staff client workstation
- 4) The **Match and load** option will use the match points to determine whether any record in the catalog matches the one that is being captured. If any does, you will be notified before it is displayed to be replaced.
- 5) **Match on title control number** - The record is considered a match only if the control number matches a title control number found in one of the Title Control Number Source fields.
- 6) **Title control number source** - "oisl" – (OCLC number, ISBN number, SSN number, LOC number).
- 7) **Call Sources** - ATDEWEYLOC,949,, (case sensitive).
- 8) **Library** – your library code.
- 9) **Format** default is MARC.
- 10) **Set remaining** properties as displayed
- 11) **Click OK.**

The screenshot shows the 'SmartPORT: Properties' dialog box with the following settings and annotations:

- Display property page:** Wizard Startup (unselected), **Never** (selected).
- Defaults** tab is active.
- MARC Import** section:
  - Bibliographic Record Load Options:**
    - Replace current record
    - Match and load
    - Match on title control number
    - Match on title control number or indexed MARC tag
    - Match on title control number and indexed MARC tag
  - Title control number source:** oisl (highlighted by an arrow from the annotation box)
  - Indexed MARC tag number:** ils
  - Call sources:** ATDEWEYLOC,949,,
  - Library:** [empty]
  - Format:** MARC
  - Remove subject headings:** 2356
- Authority Record Load Options:**
  - Replace current record
  - Match and load
  - Authority control number source:** [empty]
  - Verify options:** Yes (selected), No (unselected)
  - Strip junktags:** Yes (selected), No (unselected)
  - Script for special processing:** [empty]
- Hit limit for brief display:**
  - Single server limit: 20
  - Multi-server limit: 5
  - Browse terms limit: 8
- Gateway timeout:** 20 Seconds
- Formatted full display:** Yes (selected), No (unselected)

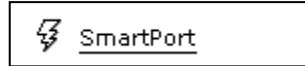
Annotations:

- A dashed box labeled **Recommended settings** encloses the 'Match and load' radio button, the 'Match on title control number and indexed MARC tag' radio button, and the 'oisl' text field.
- A text box on the right says: **To load as new record (no overlay) use k instead**, with an arrow pointing to the 'oisl' field.

### Connecting to SmartPort

When adding new titles to your library catalog, **be sure to check your own database first**. If there is no existing record there, then use SmartPort to locate one.

1. **Click** on Cataloging Wizard group.
2. **Click** on SmartPort Wizard.



3. **Select** the servers to which you want to connect. Always search **CRC** and/or **LC** before going to OCLC WorldCat!

Gateway name	Description	Selected
CRC	INFOhio Catalog (Free - try before OCLC)	<input type="checkbox"/>
LC	Library of Congress (Free - try before OCLC)	<input type="checkbox"/>
OCLC	WorldCat Subscription (use if no match in CRC/LC)	<input type="checkbox"/>
TEMPL	INFOhio Template (for Original Cataloging of Materials)	<input type="checkbox"/>

- **CRC** – Curriculum Resource Catalog - this is the INFOhio catalog of MARC records, updated weekly with records from INFOhio libraries around the state. (Combined the former ABRI, INFO-DEDUP and INFO-MEDIA catalogs) **Use this catalog as your first search choice.**
- **LC** – Library of Congress – this only contains records of items published in the U.S. Typically, you will find your “older” items here. Use this catalog as a first search, if applicable.
- **OCLC** – WorldCat - this database gives you access to the largest selection of MARC records in the world. However, you should only search here separately and as a last resort. INFOhio’s cost for this is based on the number of searches, not the number of exported records.
- **TEMPL** – this database contains only templates for local items, equipment, and original records.

4. **Click** the Connect button at the bottom of the screen. Search screen displays.




**NOTE:** To access the Z39.50 SmartPort targets for importing MARC records, the following IPs and ports need to be open through any firewalls. If you are having trouble connecting to any of the databases, notify your Networking staff they **need to allow outgoing UDP and TCP traffic** to these addresses:


- **208.108.244.219** Port **3054** to access CRC (INFOhio Records)
- **lx2.loc.gov** Port **210** to access the LC (Library of Congress catalog)
- **132.174.11.\*** Port **210** to access the OCLC WorldCat catalog (OCLC uses a range of IP’s, so must use the \*)
- **208.108.244.219** Port **3094** to access TEMPL (Templates for original cataloging)


**SmartPort Helpers and Tips**


a. Use the arrows on the helper menu to move through the title list screens of a database. For example, highlight a title in the database you wish to view, click the right arrow, and the next page of titles will display.



b.  Show / hide search box – toggles the search box off and on. When it's off, it gives you more screen to view title lists.

c.  Show / hide results list. Toggles your hit list off and on.

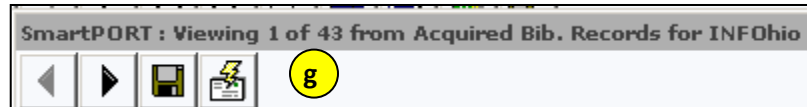
d.  You can use the Change Search Pane View icon to change the search window to a basic or labeled search window (labeled is the default).

e.  Change Gateway – allows you to connect or disconnect from a selected database without leaving SmartPort.

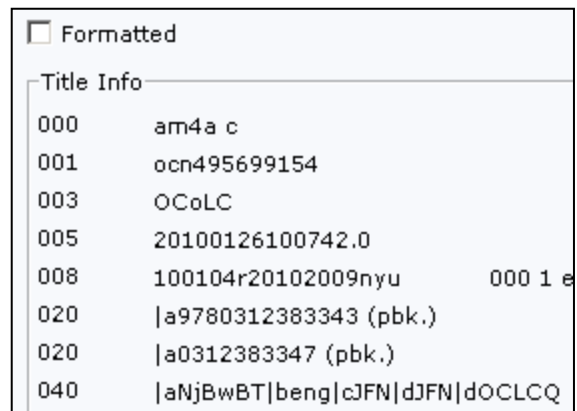
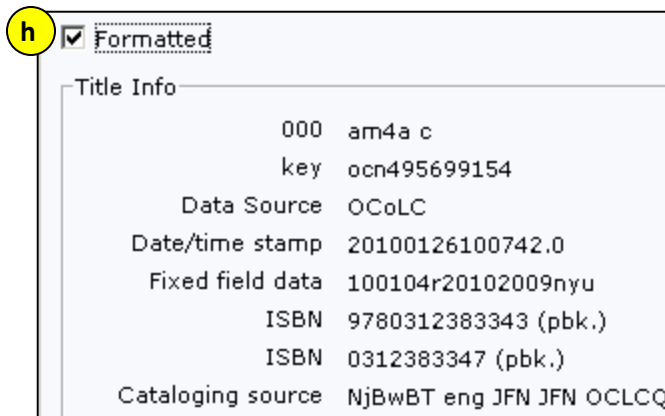
f. **Sorting Lists** - You may sort the columns by clicking on the colored column heading. This only sorts visible titles, not the complete list if it's continued on multiple screens.



g. When you have a title displayed, use the next and previous arrows to navigate through the list of titles. Also note the record number at the top.



h. Checking the Formatted box will give you a descriptive display of the MARC tags. Unchecking the Formatted box, will show the MARC tags.



## Obtaining a Record

1. In the Search window Search area, **select** an Index and **type** the Search string.

- Start your searching with ISBN. Using your barcode scanner, scan the ISBN into the appropriate search box. You can also type it in.
- If no hits, keep searching by title, author, or a combination of title and author

2. **Click:**

- Search to display search results.
- Browse to begin browsing a connected server.
- Clear to clear the search terms and start another search.

Search Hit List Window displays.

Search results are grouped by database and are numbered.

3. **Select** a title and **click** the display button to review the bibliographic record.

**NOTE:** You can only display titles from one database at a time. For example, view the records in CRC (INFOhio Catalog). If you don't like any, close the results window. Click on a title from Library of Congress and display those.

**TIP!** When selecting a record, keep in mind:

INFOhio Catalog (Free - try before OCLC) found 19 records			
1	New Moon : the official ill...	Vaz, Mark Cotta.	New York : Little, Br
2	New Moon : the official ill...	Vaz, Mark Cotta.	New York : Little, Br
3	Luna nueva / Stephenie ...	Meyer, Stephenie, 1973-	México : Alfaguara,
4	New moon / Stephenie M...	Meyer, Stephenie, 1973-	New York : Little, Br
5	New moon / Stephenie M...	Meyer, Stephenie, 1973-	New York : Little, Br
6	New moon / Stephenie M...	Meyer, Stephenie, 1973-	New York : Little, Br
7	New moon / Stephenie M...	Meyer, Stephenie, 1973-	New York : Little, Br
8	New moon / Stephenie M...	Meyer, Stephenie, 1973-	New York : Little, Br
9	New moon / Stephenie M...	Meyer, Stephenie, 1973-	New York : Little, Br
10	New Moon / Stephanie M...	Meyer, Stephenie	New York: Little, Br

Library of Congress (Free - try before OCLC) found 1 record			
1	New moon / Stephenie M...	Meyer, Stephenie, 1973-	New York : Little, Br



A record **MUST** match your item's:

- Title
- Author
- Physical Description (within a few pages is acceptable)

Get as close as possible to:

- ISBN
- Publication info – It's OK if the publishers are part of the same organization (ex. Puffin and Penguin; Scholastic and Levine). Look at the publisher identifier in the ISBN:

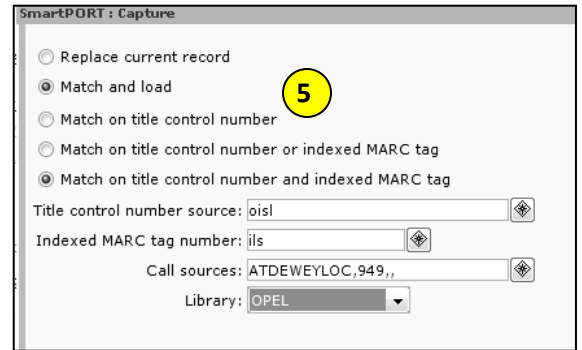
978 **05450** 10221

**05450** 10225

978 **05450** 29377

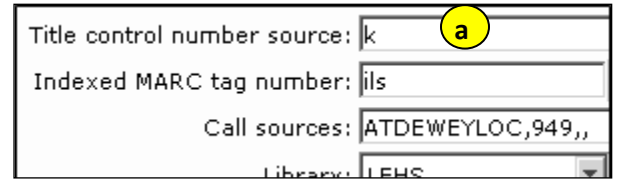
4. When you have found a record that matches your item, **click** the Capture button at the bottom of the screen.

5. **Click** OK to accept the defaults for load options previously set up in Properties or enter new changes here.



**NOTE : Other load options:**

a. If you wish to load the record as a **NEW** record (**not OVERLAY or MATCH**), remove oisl from the Title Control Number Source and replace it with "k". The record will load as new with a unique Title Control number. Use this method when loading:  
 - **SET records**, which overlay each other due to "set ISBN"  
 - **TEMPLATE records**



b. If you want to **overlay a specific record** in your database, close all wizards in Workflows. Then open the record you wish to replace in Call Number and Item Maintenance before you go to SmartPort. This will ensure that only the record you want overlaid is open. When you locate and capture the record you desire, **bullet Replace Current Record**.



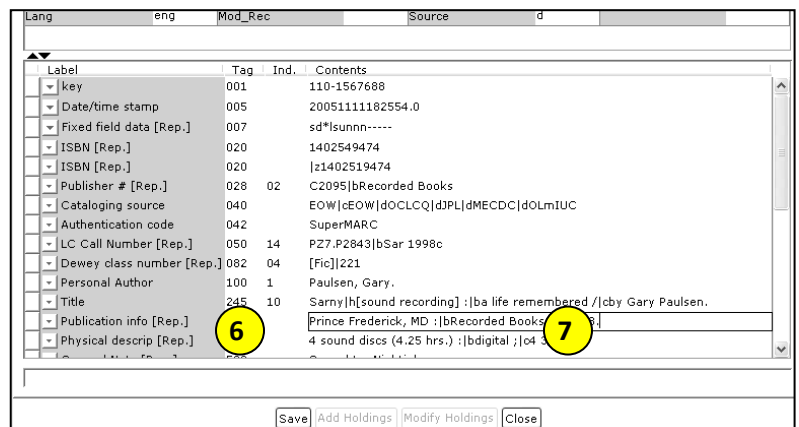
Capture screen displays.

**DO NOT** edit the call number at this time. The Call Number is Auto generated.

6. **Click** the Save button to save this record in your database.

If you decide NOT to load this record, **click** Close and No to save – record will not be loaded.

7. Record is finished loading when the Save button grays out. **Click** the Close button.



8. You may **either complete** the cataloging for this item (**go to Basic Cataloging/SmartPort/Complete Cataloging**) **or continue exporting** records from SmartPort. Connected servers remain connected until you disconnect them or the server times out.

### Using SmartPORT to Obtain a New Record

1. **Click** on Cataloging Wizard.
2. **Click** on SmartPort Wizard.

Gateway name	Description	Selected
CRC	INFOhio Catalog (Free - try before OCLC)	<input type="checkbox"/>
LC	Library of Congress (Free - try before OCLC)	<input type="checkbox"/>
OCLC	WorldCat Subscription (use if no match in CRC/LC)	<input type="checkbox"/>
TEMPL	INFOhio Template (for Original Cataloging of Materials)	<input type="checkbox"/>

3. **Select** the database(s) to search. Always search **CRC and LC** before going to OCLC WorldCat.

**Connect** **Close**

4. **Click** the connection button at the bottom of the screen.
5. In the Search window Search area, **select** an Index and **type** the Search string.
6. **Click** Search to display search results.
7. **Use** the next and previous arrows to navigate through the search list.
8. **Select** a title and **click** the display button to review the bibliographic record.
9. When you have found a record you want to capture, **Click** the Capture button at the bottom of the screen.

Search Results

INFOhio K-12 UC (SuperMARC) found 1344 record(s)

4	Sarny [sound recording] : a life remembered / by ...	Paulsen, Gary.
5	Dogsong	Paulsen, Gary.
6	The cookcamp / Gary Paulsen.	Paulsen, Gary.

Library of Congress Catalog found 571 record(s)

1	175 Jahre pfälzisches Oberlandesgericht : 1815 Ape...
2	Afrika : natur, samfunn og bistand / Nils Chr. Stens...
3	Afsvoeringsanlæg for røggas : referat af høring afh...

Display **9** Close

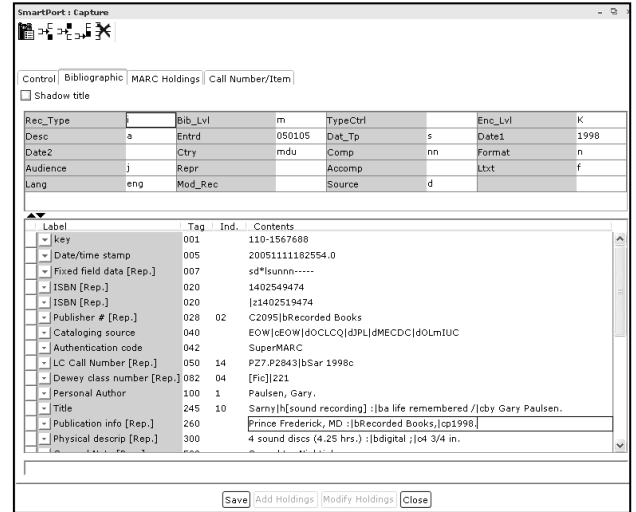
Continued-



10. **Click** OK to accept the defaults for load bibliographic record options or enter new changes here.
11. **DO NOT** edit the call number at this time. **Click** the Save button to save this record in your database.

(If you decide NOT to load this record, **click** Close and No to save – record will not be loaded.)

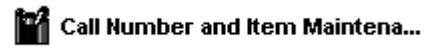
12. When the Save button grays out **click** the Close button.
13. After capturing all the records you wish, **close** the SmartPort wizard. Connected servers remain connected until you disconnect them or the server times out.



Continue to **SmartPort: Completing the Cataloging Process**

## SmartPort - Completing the Cataloging Process

1. **Click** on Call Number and Item Maintenance Wizard.



2. **Click** on Current title to edit the new record, or search for record, if not current.

Call Number and Item Maintenance screen displays.

3. **Click the Add Item button** at the bottom of the screen.

4. **Modify** the call number.

- a. **Change** Class scheme from *AUTO* to *ATDEWEYLOC*.

Do not change the shelving key.

If you check Shadow Call Number, all items connected to that call number will be shadowed (hidden from view in the online catalog.)

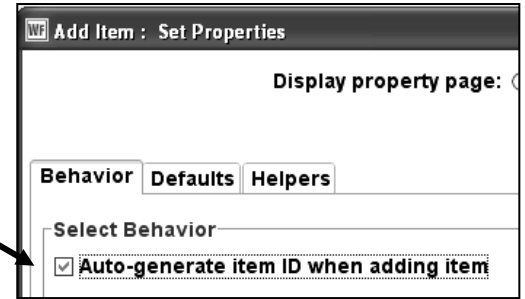
5. **Add Item Information**

- a. **Item ID** – you should select one of the following procedures to enter item IDs. Select the one method that works best for your school:

- **Dumb barcodes** – **scan or type** the barcode number. If you scan the barcode, the number will be saved to the record and appear on the left side of the screen. If barcode validation is turned on for your district, you will be able to type the barcode shortcut.
- **Barcode Shortcut** – If you are using this feature, you must have auto-generate barcodes turned off in properties. You will be able to type just the significant digits with an x. However, you will need to keep track of the significant digits.

Ex. 32612000100069 could be typed as 10006X

- Auto-generate barcodes – A new barcode number will automatically be generated. Check with your ITC to request this function be set up for your district. You also must have Auto-generate item ID checked in properties (Right click on the Add Item wizard > select properties > Behavior tab > check Auto-generate item id).



b. Other Item Information fields:

**Type:** Use the Drop Down menu to select the item group.

**Shelf Location:** Leave to default – Available

**Material Type:** Use the Drop Down menu to select the material type (this is the icon that will display in the online catalog).

**Media Desk** – leave blank

**Total Checkouts** – leave blank – the system generates this number.

**Copy Number** – system generated – do not change.

**Item Library** – your library should be there. If a different library appears, you have selected the wrong call number. Click Delete and go back to Step 5a

**Funding Source** – optional

**Number of pieces** - indicates the number of pieces associated with a particular copy. If a value of two or more is entered in the number of pieces field, the Circulation wizards will require an override code to check out and check in the item to remind the library staff to check for number of pieces associated with this item.

**Price** - Enter Price

**Price** - Enter Price

Permanent – leave checked

Circulate – leave checked

Shadow item – check if you do not want the item to appear in the online catalog.

Tag	Contents
CIRCNOTE	Donated by Steve Coon
PUBLIC	Donated by Steve Coon
STAFF	

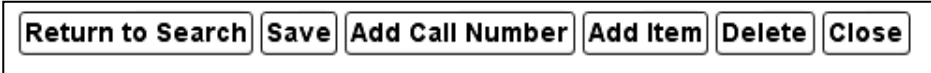
6. **Extended Information**

**Circ Note** – appears when the item is checked in and checked out. Use for comments such as 10 copies in set, CD at desk, etc.

**Public** – enter any comments you want to appear in the online catalog such as Donated by the Smith Family.

**Staff** – enter any comments you want to appear only in Workflows such as PO # 1234.

7. **Select** from options:



- Return to Search - Return to the search list to look up another title in Call Number and Item Maintenance.
- Save – this saves your new record.
- Add Call Number - Add another call number to the same title.
- Add Item - Add another item to the call number you just added.
- Delete an item from this record.
- Close window

8. When finished with this record, **click** the Close button at the bottom of the screen. You will see the SmartPort screen and can continue searching for new records.

**NOTE:** *It is important to close the Call Number and Item Maintenance screen if you will be importing multiple records from SmartPort. This will allow the record you export to be the “current record” in Step 2 above.*

**Note: For more detailed information or specific questions, use HELP wizard**

## SmartPort - Completing the Cataloging Process

1. **Click** on Cataloging Wizard group.
2. **Click** on Call Number and Item Maintenance Wizard.
3. **Click** on Current title to edit the new record or search for the title.
4. **Click** the Add Item button at the bottom of the screen.
5. **Enter** the appropriate call number and item information.
6. **Click** the Save button at the bottom of the screen.
7. When finished, **click** the Close button at the bottom of the screen.

4

**Add Brief Title**

The Add Brief Title wizard guides you through the process of adding a title to the catalog. This is intended for published items that do not currently have a full marc record available. It is assumed that the librarian will continue looking for a better record. You can easily locate all the brief records you create by doing a General Search for "brief record."

1. **Click** the Item Maintenance wizard group.

**Set properties**

Properties need to be set the first time the wizard is used.

2.  **Add Brief Title** *Right click* on Add Brief Titles wizard. **Select** Properties.

- a. **Bullet** Never.
- b. **Selected Entries** - Default tag numbers separated by commas: 020,100,245,260,300,989
- c. **OPTIONAL:** **Uncheck Shadow Title** if you want the record to be searchable in CAT.
- d. **Set** defaults to most used options. These options may be changed when cataloging a large number of items with similar characteristics (i.e. funding source or item type). You may also make changes when entering specific item information.
- e. **Click** OK to save.

2. **Click** on Add Brief Title wizard.

3. **Enter** Title info:

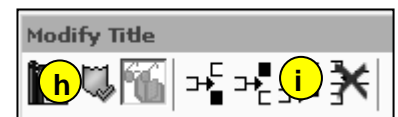
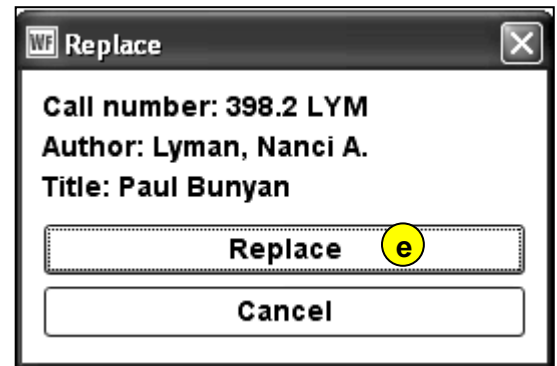
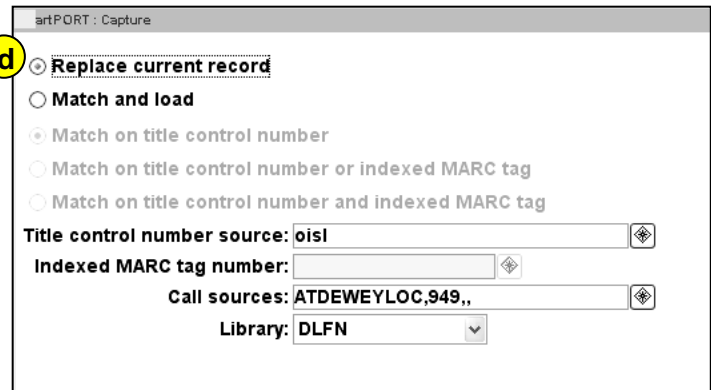
- a. ISBN – no dashes
- b. Author – last name, first name
- c. Title
- d. Publication info – include location, company, and date  
Ex. New York: Morrow Junior Books,1989.
- e. Physical description – include page number
- f. Type "Brief Record" in the 989 field.

4. **Enter** Call number and Copy info.
  - a. **Replace** the XX call number.
  - b. **Select** your library code and item group from the drop down menus.
  - c. **Leave** Shelf location AVAILABLE.
  - d. **Enter** item number in your usual manner (scan dumb barcode, barcode shortcut, or auto-generate).
  - e. **Select** Material type.
  - f. **Select** Funding source if desired.
5. Click the Add Brief Title button. You can then select Add Another Brief Title, Make More Changes, or Close.

The Item is now ready to circulate.

**NOTE:** Remember, the brief record will need to be replaced with a better record as soon as possible.

- a. Open the **Modify Title wizard**. Do a **General Search** for "Brief Record" to get a list of your brief records.
- b. **Click** Modify to **display** the record you wish to replace.
- c. **Search** for a better record in SmartPort.
- d. When you capture the record, **bullet** Replace current record.
- e. A popup screen will display the call number, author, and title. Verify that it is the record you want to replace and **click** the Replace button.
- f. **Click** Save and Close as usual. The new record will appear in your database with the item information attached.
- g. Your brief record will still be displaying in Modify Title. You will need to **click** Return to search and then **click** Modify to refresh the screen and see the new record.
- h. Use the Validate Headings helper to validate authority entries and headings. See *Authority Section for guide*.
- i. Use the Delete a Field helper to **remove** the 989 tag. See *Cataloging Helpers, guide, for detailed instructions*.



**Note:** For more detailed information or specific questions, use **HELP** wizard.



1. **Click** the Item Maintenance wizard group.
2. The first time you use this wizard, you'll need to **set the properties**. **Right click** on the Add Brief Title wizard. **Select** Properties.
  - a. **Bullet** Never.
  - b. Use Drop down menu to **select** "Selected Entries".
  - c. Type in the following tag numbers separated by commas: 020,100,245,260,300,989
  - d. **OPTIONAL: Uncheck Shadow Title** if you want the record to be searchable in CAT.
  - e. Set defaults to options you use the most.
3. **Enter** Title info:
  - a. ISBN – no dashes
  - b. Author – last name, first name
  - c. Title
  - d. Publication info – include location, company, and date  
Ex. New York: Morrow Junior Books, 1989.
  - e. Physical description – include page number
  - f. Type "Brief Record" in the 989 field.
4. **Add** item information.



## MARC Export

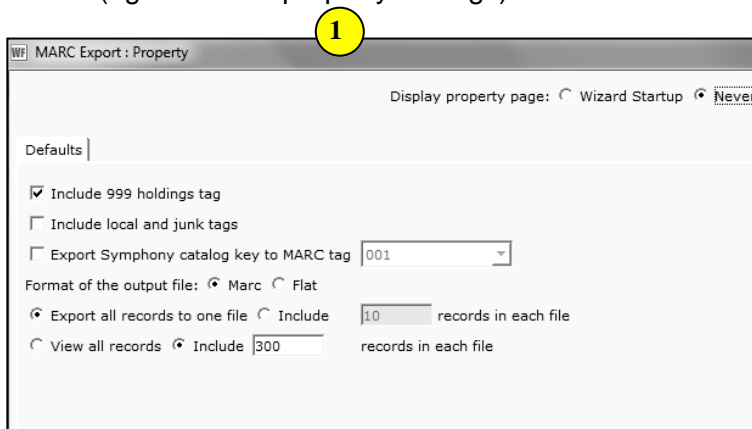
The MARC Export Utility wizard can be used to export catalog records from the Unicorn database and copy them to a file on the workstation or the Unicorn server. Catalog records may be exported for a number of reasons.

- To contribute to a state library catalog or union holdings list.
- To have authority processing done by a vendor.
- To maintain holdings at a book jobber/vendor to check orders for duplicates.

Do the following to review and export records:

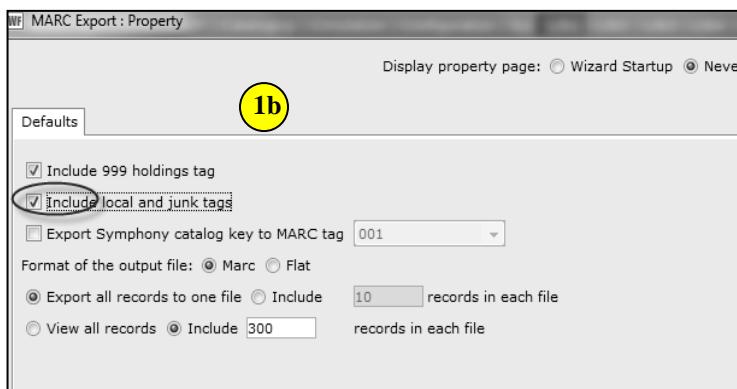
1. **Set Properties** on the MARC Export wizard (right-click for property settings).

- a. Select **Include 999 holdings** tag, if this export file needs holdings included (ex – for collection analysis)



- b. **If the records are being exported for enhancement**, and will be reloaded, please work with your ITC staff for details. Property settings will “include local and junk tags”.

- c. Decide how many records you want to export to each file for viewing, and set the MARC Export wizard properties accordingly. **If exporting for file analysis, it is best to select “Export all records to one file” – you will have one file for export.** Or if 1000 records are being exported, and you want to put 300 records in each file, select the **Include N Records** export option in the wizard properties, and type **300** in the text box. You will have several files when completed.



- d. If you want to preview the catalog records before exporting them, decide how many records to display in each preview file, and select the MARC Export wizard properties accordingly. **It is best to not have more than 300 records per file, since viewing such a large document in Word will be difficult.** For example, all records are being exported, and you want to put 300 records in each file for viewing. Select the **Include N Records** view option, and type **10** in the text box.

2. **Run** the Extract Keys for MARC Export report.

- a. **Click** on Schedule New Reports.
- b. **Click** on Bibliographic Tab.
- c. **Select** the Extract Keys for MARC Export report. **Select** the criteria to pull records. This report selects the catalog records that will be exported and saves the number of catalog records specified in the wizard properties to each file. Select "Run Now".

3. **Click** on Cataloging Wizard.

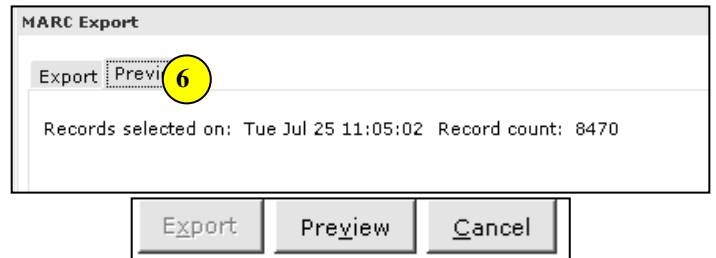
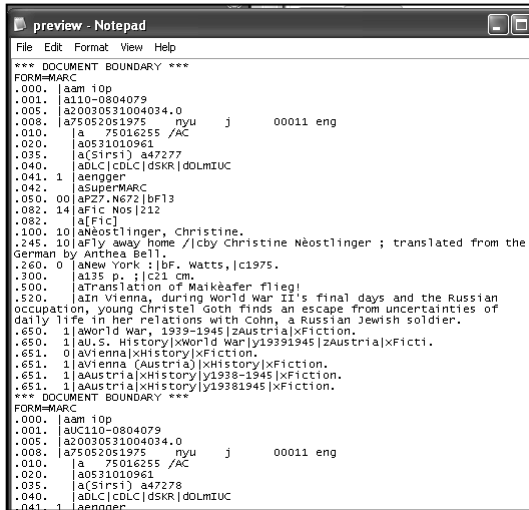
4. **Click** MARC Export wizard.



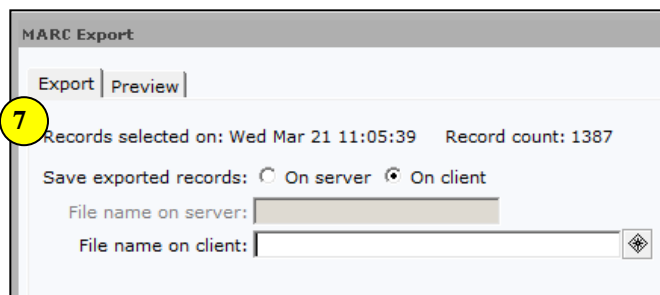
5. If property window displays, verify the wizard properties are set as you want (see above) and **click** OK.

6. If you want to preview the catalog records before exporting them:

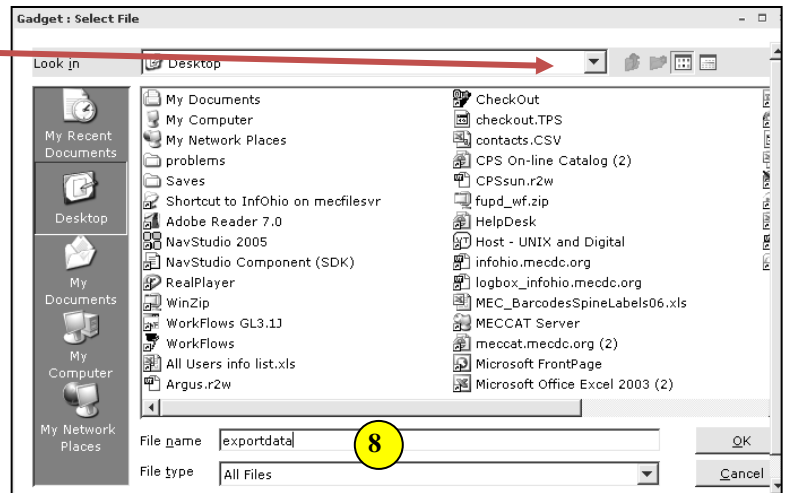
- a. **Click** the Preview tab. If a File to View list displays, **select** the file of records you want to view.
- b. **Click** Preview button. Repeat this step for all the files you want to display.



7. **Click** on the Export tab. The *Records Selected On* field shows the most recent run date and time of the *Extract Keys for MARC Export* report. The *Record Count* field displays the total number of catalog records to be exported.



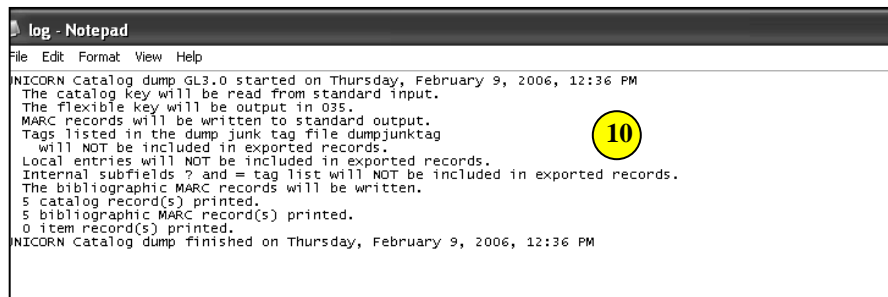
8. In the *File name on client* option, **use** the gadget to determine where the file will be saved on your computer, name your file (**exportdata** is suggested), **hit the OK button** to save your file on your computer.



9. **Click** Export.



10. When the wizard finishes exporting the files, the *log.txt* file opens and displays the export log. **Review** the log file, and close the log file window.



11. **Click** OK to close the Completed dialog box.

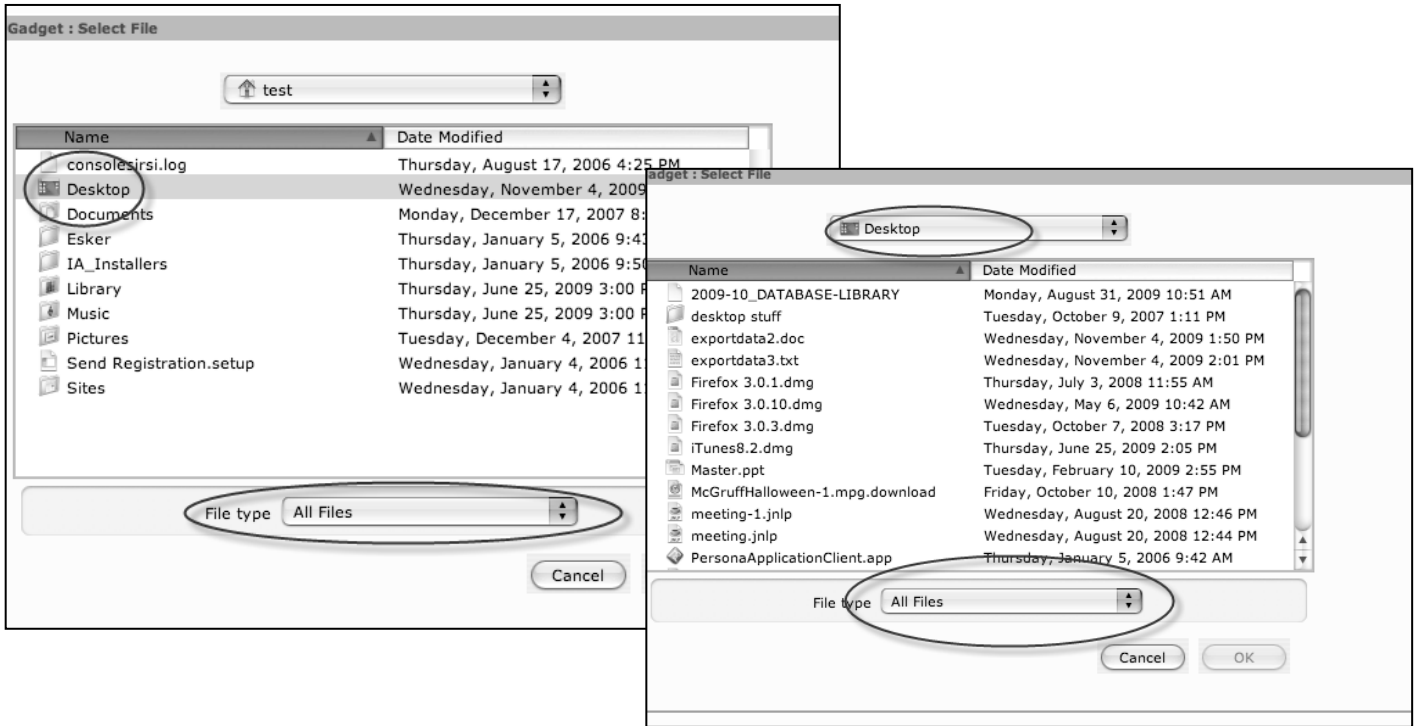


The file is now in Marc format and saved on your computer ready to send as necessary.

**NOTE:** *If the report file does not exist in the Unicorn/Xfer directory when the MARC Export Utility wizard is used, a message appears and informs you to run the Extract Keys for MARC Export report before exporting records.*

**MAC USERS – Workaround for saving file to computer desktop:**

(NOTE – no place to name this file in order to save it onto the desktop – compare to PC screenshot, where you can name the file and save it)

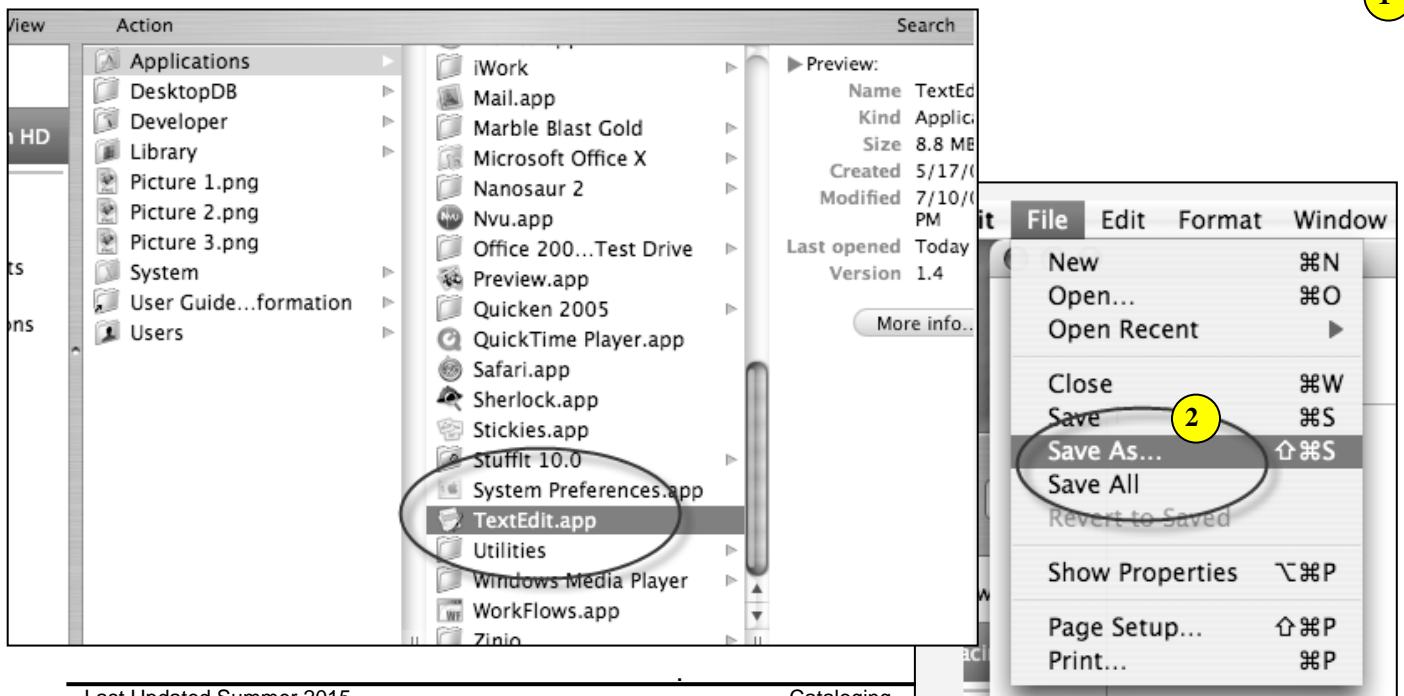


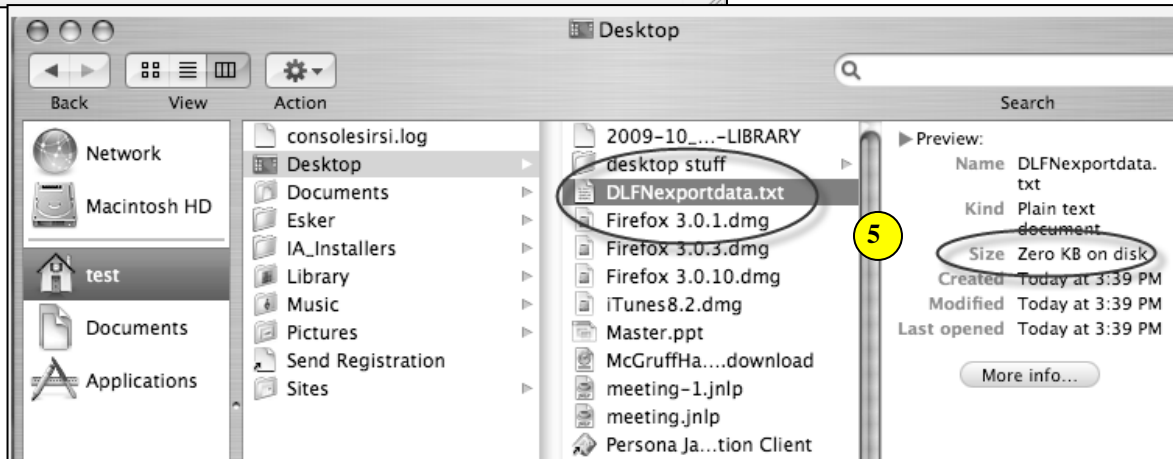
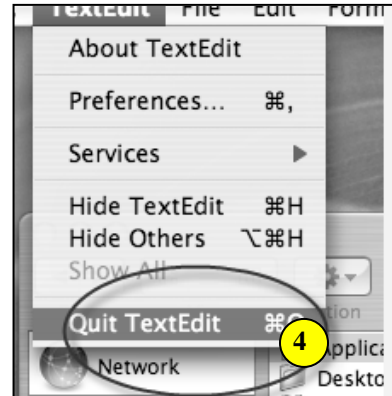
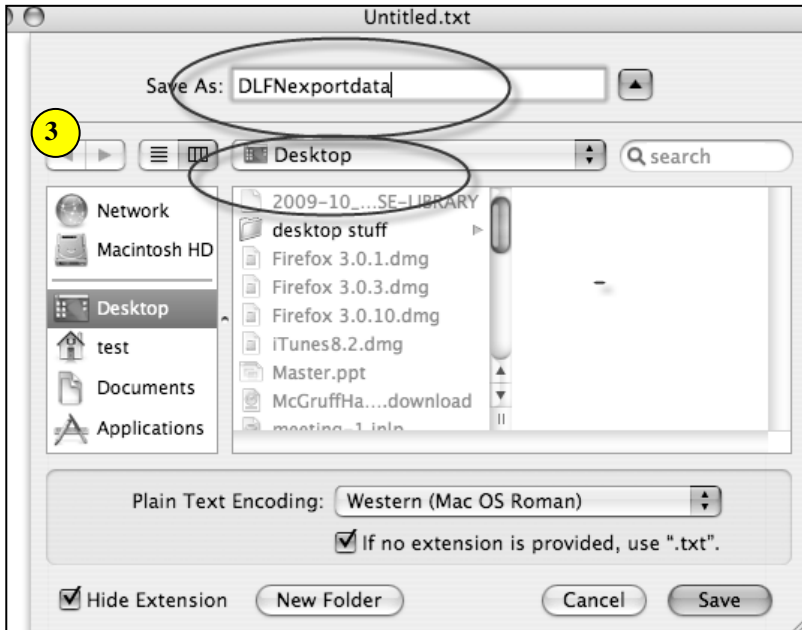
What follows is a “workaround”:

**MAC Workaround:**

Select TextEdit application, create an empty document with name of *exportdata*:

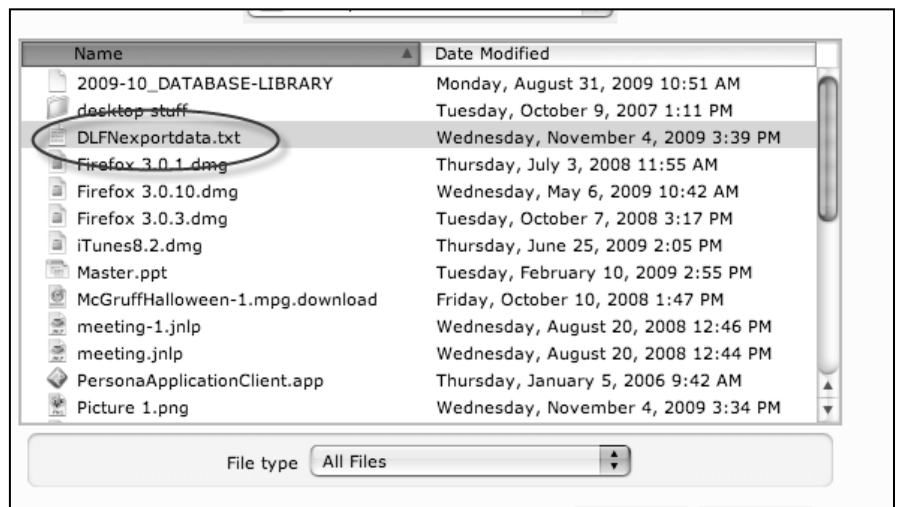
1

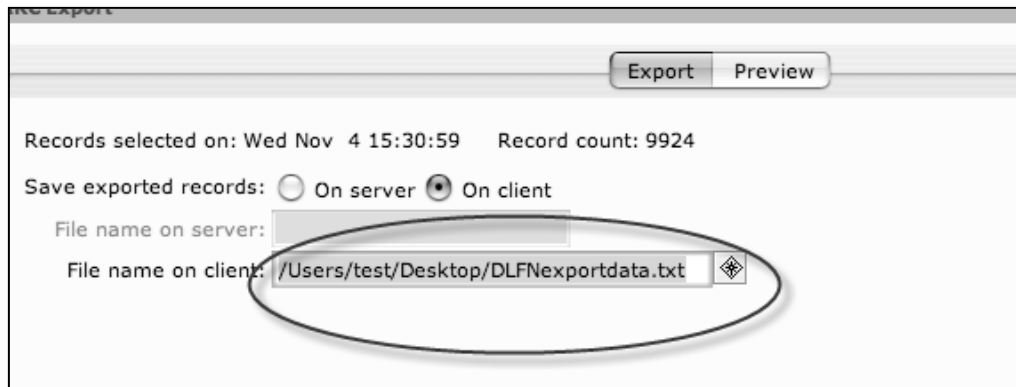




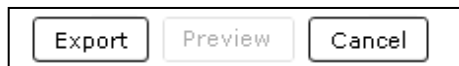
**Step to name/save file:**

In the *File name on client* option, select the gadget, **SELECT** the empty *exportdata.txt* document, and **save your file to (as) that document** on your computer

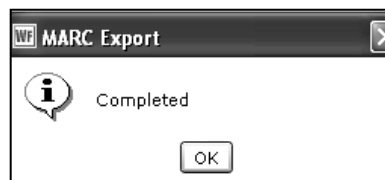




**Click Export**



**Click OK** to close the Completed dialog box.



The file is now in Marc format and saved on your computer ready to send as necessary.

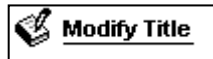
**Note: For more detailed information or specific questions, use HELP wizard.**

## Modify Title

The Modify Titles wizard allows you to make changes to bibliographic records already in the catalog.

**NOTE:** *Follow the Guidelines for Enhancing Marc Records. This is a Tip Sheet in the online handbook/Cataloging section. It will explain in detail how to make changes in various fields as well as other information that must be edited when you change a marc record.*

1. **Click** on Cataloging Wizard.
2. **Right Click** on the Modify Title Wizard.
3. **Change** the properties to MARC View.
4. **Click** on Modify Title Wizard.



*Modify Title:* screen displays.

5. **Locate** the title you want to modify.
6. **Click** Modify.

*Modify Title* screen displays.

7. **Make changes** to required fields on the Bibliographic Tab (as directed in the Guidelines for Enhancing Marc Records document)

8. **Make changes** to fields needed to match the record to your item. Use helpers or right-click menus to make appropriate changes.

9. Validate new or modified headings using the Validate Headings Helper. See Authority Section 13.2 for detailed instructions.



10. **Click Save.**
11. **Click** on Call Number/Item Tab if modifications are needed to item or call number information.

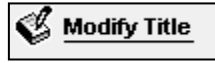
Label	Tag	Ind.	Content
Leader	000		*****am ***** a*****
key	001		fol03315033
Data source	003		ICrIF
Date/time stamp	005		20030206183728.0
Fixed field data	008		960819s1997 njua d b 001*0beng
010	010		96042437 /AC
ISBN	020		0894908332
Local system #	035		(Sirsi) i0894908332
Local system #	035		(ICrIF)24213C
Cataloging source	040		DLC cDLC dICrIF dKyLxBWI dOKaLSD
Geographic area code	043		n-us---
LC Call Number	050	00	E814 b.S38 1997
Dewey class number	082	00	973.918/092 aB 221
Personal Author	100	1	Schuman, Michael.

12. **Save** your changes.

**NOTE:** *Do not make any changes on the Control Tab.*

**NOTE:** Before you modify a record, please consult the *Follow the Guidelines for Enhancing Marc Records* tip sheet.

1. **Click** on Cataloging Wizard.



2. **Click** on the Modify Title Wizard.

3. **Locate** the title you want to modify. **Click** Modify

4. **Make changes** to required fields on the Bibliographic Tab (as directed in the Guidelines for Enhancing Marc Records document)

5. **Make changes** to fields needed to match the record to your item. Use helpers or right-click menus to make appropriate changes

6. Use helpers to add or delete fields.

7. **Click Save.**

8. **Click** on Call Number/Item Tab if modifications are needed to item or call number information.

8. **Save** your changes.

**NOTE:** *Do not make any changes on the Control Tab.*



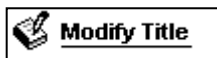
## Adding 521 Lexile Tag

Lexile levels are searchable in CAT2.0. Follow the directions carefully to be sure you'll get results when you search.

You will find a lot of information about lexiles at <http://www.lexile.com/>. There is a quick book search feature which allows you to search by title or author to locate the lexile level of a book.

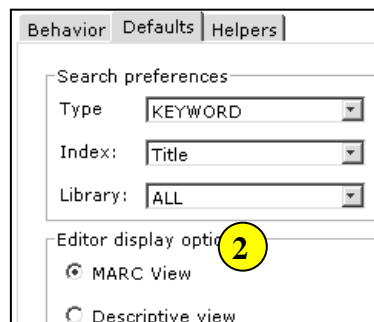
1. **Click** on Cataloging Wizard.

2. **Set properties**



- **Right Click** on the Modify Title Wizard.
- **Change** the properties to MARC View.

**Click** on Modify Title Wizard.  
Modify Title: screen displays.



3. **Locate** the title you want to modify. **Click** Modify.  
ModifyTitle screen displays.

4. **Update or add an 040 tag.**

- Add subfield d ( |d ) with your LC/NUC code to the 040 tag. There can be more than one |d.
- If you do not know your code, it can be found at <http://lcweb.loc.gov/marc/organizations/>
  - If there is no 040 tag, create one and enter your code in subfield a of the 040.

Data source	003	IJPBB
Date/time stamp	005	20061012163458.0
LCCN	010	97029718
ISBN	020	0689832133 : c\$17.07
Local system #	035	(Sirsi) i9780689832130
Local system #	035	pbb00000055796
Cataloging source	040	DLC cDLC dDLC dIJPBB
LC Call Number	050	PZ7.C88135 bCl 2000

5. **Add a 521 tag.**

- Click** on the highest tag before 521.
- Right mouse click** and **select** Add Field After.
- Type** 521 in the newly created tag.
- Press** tab.
- Type 8 for the first indicator.

260		New York : bScribner, c1940.
300		471 p. ; c22 cm.
500		"The first printing has the code letter A on the copyright pag
500		First printing.
510	4	Johnson, M. de V. First editions (4th ed.), cp. 236
		First printing of Amer. authors, cv. 1, p. 179
		War, 1936-1939 xFiction.

f. **Press** Tab and **enter** the Lexile number followed by |bLexile

Audience	521	8	540 bLexile
----------	-----	---	-------------

6. **Click** Save.

7. **Click** on Call Number/Item Tab if modifications are needed to item or call number information.

8. **Save** your changes.

**NOTE:** Do not make any changes on the Control Tab.

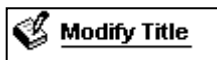
## Adding 526 Reading Program Tag

The Modify Titles wizard allows you to make changes to bibliographic records already in the catalog.

**NOTE:** Before you modify a record, please consult the Tip Sheet *Enhancing Marc Records*.

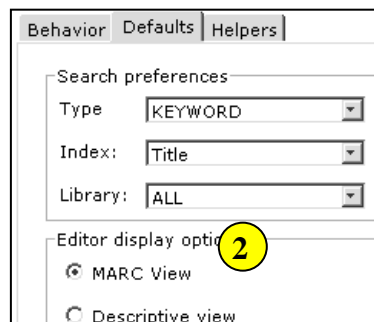
1. **Click** on Cataloging Wizard.

2. **Set properties**



- **Right Click** on the Modify Title Wizard.
- **Change** the properties to MARC View.

**Click** on Modify Title Wizard.  
*Modify Title:* screen displays.



3. **Locate** the title you want to modify. **Click** Modify.

*Modify Title* screen displays.

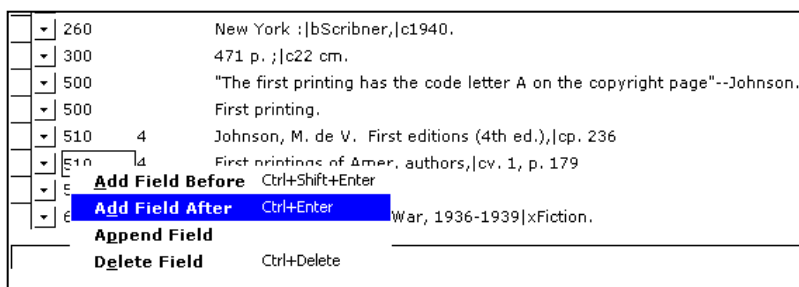
4. **Update or add an 040 tag.**

- Add subfield d ( |d ) with your LC/NUC code to the 040 tag. There can be more than one |d.
  - If you do not know your code, it can be found at <http://lcweb.loc.gov/marc/organizations/>
- If there is no 040 tag, create one and enter your code in subfield a of the 040.

▼	Data source	003	IJPBB
▼	Date/time stamp	005	20061012163458.0
▼	LCCN	010	97029718
▼	ISBN	020	0689832133 : c\$17.07
▼	Local system #	035	(Sirsi) i9780689832130
▼	Local system #	035	pbb00000055796
▼	Cataloging source	040	DLC cDLC dDLC dIJPBB
▼	LC Call Number	050	PZ7.C88135 bC 2000

5. **Add a 526 tag.**

- Click** on the highest *tag* before 526.
- Right mouse click** and **select** Add Field After.
- Type** 526 in the newly created tag.
- Press** tab.
- Type 0 (zero) for the first indicator.



f. **Press** Tab and **enter** the information for your reading program.

526	▼	0	▼	Accelerated Reader AR bMO c5.0 d8.0 5CHMS
-----	---	---	---	---

Use this format:

**Program Name|bInterest level|cReading level|dTtitle point value|5Building code**

You can copy or modify the information from the list provided below.

- Essential: The building code |5 is essential to have the **record correctly displayed** in Cat2 if you have the “**Check for Tests**” feature turned on in the OPAC. If not, the |5 field is not necessary.
- **Each** unique |5 location **MUST** have a **separate** 526 tag.
- No punctuation is needed at the end.

Accelerated Reader AR|bK-2|c1.0|d1.0|5<building code>  
 Accelerated Reader AR|bK-2|c2.0|d2.0|5<building code>  
 Accelerated Reader AR|b3-5|c3.0|d3.0|5<building code>  
 Accelerated Reader AR|b3-5|c4.0|d4.0|5<building code>  
 Accelerated Reader AR|b3-5|c5.0|d.0|5<building code>  
 Accelerated Reader AR|b6-8|c6.0|d6.0|5<building code>  
 Accelerated Reader AR|b6-8|c7.0|d7.0|5<building code>  
 Accelerated Reader AR|b6-8|c8.0|d8.0|5<building code>  
 Accelerated Reader AR|bUG|c9.0|d9.0|5<building code>  
 Accelerated Reader AR|c10.0|d10.0|5<building code>  
 Accelerated Reader AR|c11.0|d11.0|5<building code>  
 Accelerated Reader AR|c12.0|d12.0|5<building code>

Reading Counts!|bK-2|c1.0|d1.0|5<building code>  
 Reading Counts!|bK-2|c2.0|d2.0|5<building code>  
 Reading Counts!|b3-5|c3.0|d3.0|5<building code>  
 Reading Counts!|b3-5|c4.0|d4.0|5<building code>  
 Reading Counts!|b3-5|c5.0|d.0|5<building code>  
 Reading Counts!|b6-8|c6.0|d6.0|5<building code>  
 Reading Counts!|b6-8|c7.0|d7.0|5<building code>  
 Reading Counts!|b6-8|c8.0|d8.0|5<building code>  
 Reading Counts!|bUG|c9.0|d9.0|5<building code>  
 Reading Counts!|bUG|c10.0|d10.0|5<building code>  
 Reading Counts!|bUG|c11.0|d11.0|5<building code>  
 Reading Counts!|bUG|c12.0|d12.0|5<building code>

6. **Click** Save.
7. **Click** on Call Number/Item Tab if modifications are needed to item or call number information.
8. **Save** your changes.

**NOTE:** *Do not make any changes on the Control Tab.*

## Assigning Subject Headings

### Subject headings provide two services to your patrons:

1. The ability to search the OPAC for materials on specific topics.
2. The ability to find additional materials by using the hyperlink in the subject field.

Assigning subject headings may be necessary when evaluating and editing existing records in your collection; when evaluating and editing records imported from SmartPort or received from vendors; and when cataloging with INFOhio templates.

### Two key guidelines:

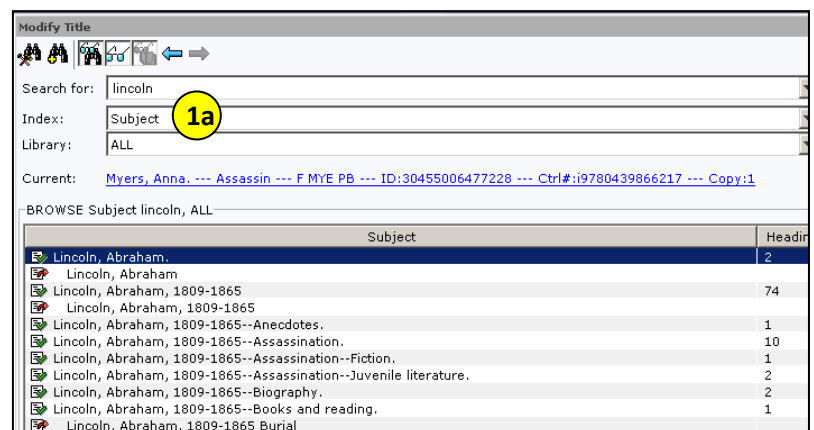
1. Be consistent.
  - **Subject heading hyperlinks work only if the subjects are in the exact same format.** If you use “Baseball – Biography” for some titles and “Baseball players – Biography” for others, the OPAC hyperlink will not take the patron to all library materials dealing with the biographies of baseball players.
  - Make building or district decisions regarding cataloging practices and follow those guidelines when assigning subject headings.
  - **Specifications sent to vendors for your library need to request Library of Congress Subject headings.**
  - When receiving new materials, check subject headings assigned to items in your vendor records to be certain they are consistent with your guidelines.
2. Keep your patron in mind.
  - Choose subject headings that are most appropriate to the school curriculum and the needs and interests of your students.
  - If students are looking for sports biographies, are your subjects going to be “Athletes”, “Sports -- Biography”, or “Baseball -- Biography” or all three? Train students accordingly.
  - If a student locates a biography of a baseball player in the OPAC, a subject hyperlink should lead to additional materials on that subject no matter what call number has been assigned or where they are shelved in your library, i.e. 796.357, 920, B, REF, DVD, etc.

### Selecting subject headings:

1. **Search your library database** for the subject you need. Note the subject headings used on similar items. Add the same subjects to your record so they will hyperlink.

- a. **Search** using the Modify Title wizard.

A Subject Browse for a broad topic will show you all the related headings currently in your database and the number of records that include them.



b. When you locate the desired subject heading, highlight the title at the bottom of the screen and **click** Modify.

c. Locate the desired subject heading in the record. **Note** the tag number and indicators.

Label	Tag	Ind.	Contents
Summary	520		Describes the assassination of Abraham Lincoln and Booth in graphic novel format.
Interest grade level	521	2	3-9.
Reading grade level	521	0	4.
Reading program	521	1c	Accelerate 1d der AR bMG c3.7 d0.5 z85022
Personal subject	600	11	Lincoln, Abraham, d1809-1865 xAssassination.
Personal subject	600	11	Booth, John Wilkes, d1838-1865.
Subject term	650	0	Political crimes and offenses.

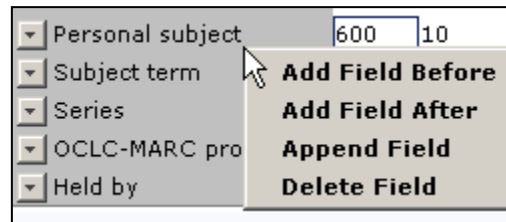
d. **Copy** (Ctrl + c) all the information in the Contents field.  
NOTE: In Sirsi |a is assumed and does not display.

e. **Open** the record you are modifying in the Modify Title wizard.

f. **Add** a tag with same number and Indicator.

Be careful to use:

- 600 = Personal subject
- 650 = General subject
- 651 = Geographic subject



**Right click** where the 6XX tag would go. **Select** Add Field After.

**Enter** the same tag number and indicators.

g. **Paste** (Ctrl + v) the subject heading into the contents field. **Note:** Subject headings end in a period.

600: 11 : Lincoln, Abraham,|d1809-1865|xAssassination.

**NOTE:** OPAC format – (what your patrons see):

**Lincoln, Abraham, 1809-1865 - - Assassination.**

h. **Update or add** an 040 tag.

- Add subfield d ( |d ) with your LC/NUC code to the 040 tag. There can be more than one |d.
- If you do not know your code, locate it at: <http://lcweb.loc.gov/marc/organizations/>
- If there is no 040 tag, create one and enter your code in subfield a of the 040.

Data source	003		IJPBB
Date/time stamp	005		20061012163458.0
LCCN	010		97029718
ISBN	020		0689832133 : c\$17.07
Local system #	035		(Sirsi) i9780689832130
Local system #	035	1h	pbb00000055796
Cataloging source	040		DLC cDLC dDLC dIJPBB
LC Call Number	050	00	PZ7.C88135 bCl 2000

2. **Check the OPACs of other schools.** If you can't find appropriate subject headings in your own database, use the online catalog to search other schools.
  - a. **Locate** an item in the OPAC that has the subject heading you need.
  - b. **Select** the Full Description tab.
  - c. **Select** Change Display.
  - d. Under Change Catalog Display **change** unformatted display to "yes". Full Description will now display MARC format.
  - e. **Highlight and copy** the subject heading with all delimiters and punctuation. Remember, in Sirsi **ja** is assumed and does not display.
  - f. Open the record you're modifying in Modify Title.
  - g. **Paste** (Ctrl = v) subject heading into record.  
Be careful to use the same tag number and indicator values. Subject headings should end in a period.
    - 600 = Personal subject
    - 650 = General subject
    - 651 = Geographic subject
  - h. **Add or update** the 040 (Step 1-h above)
  
3. **Check public libraries.**
  - a. Use the online catalog to subject headings that public libraries have added to their records for your title.
  - b. Display the record in MARC format and proceed as you would if copying from a school library OPAC.

**Editing subject headings:**

- Check your new and existing records for any unnecessary or unwanted subject headings and delete those that are not appropriate. Start with the most popular subjects.
- Don't add multiple headings for subjects with only a few titles unless they are really needed.
- When editing subject headings, choices should be consistent and reflect the library collection on this topic.

For example, too many headings for a subject like *Vampires/vFiction*, will limit search results rather than help.


Current subjects in a record	Less can be best!
Vampires--Comic books, strips, etc.	Vampires--Comic books, strips, etc
Vampires--Comic books, strips, etc.--Fiction	Vampires--Fiction.
Vampires--Comic books, strips, etc.--Juvenile fiction	
Vampires--Encyclopedias.	
Vampires--Fiction	
Vampires--Japan--Comic books, strips, etc	
Vampires--Juvenile fiction.	
Vampires--Juvenile literature.	
Vampires--Russia--Moscow--Fiction.	

4. For further assistance please contact your INFOhio Provider.

Use any of the following online sites for subject heading suggestions:

- WorldCat access to **1.5 billion items** from more than 10,000 libraries worldwide  
<http://www.worldcat.org/>
- Library of Congress Online Cat  
<http://catalog.loc.gov/>
- Library of Congress Authorities and Vocabularies search  
<http://id.loc.gov/authorities/search/>
- Basic library knowledge / skills for staff members who have no formal education in library science  
<http://libraries.idaho.gov/page/alternative-basic-library-education-able>

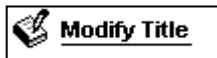
**Adding 856 Tag – URL link to podcasts**

Adding an 856 tag to a marc record will put in a hyperlink to a web site. It will also add a link icon  to the record in CAT. Keep in mind, once you add a link to a record, you'll need to maintain it.

**You must have** a 590 tag to make your records searchable so you can maintain them and students or teachers can locate them easily.

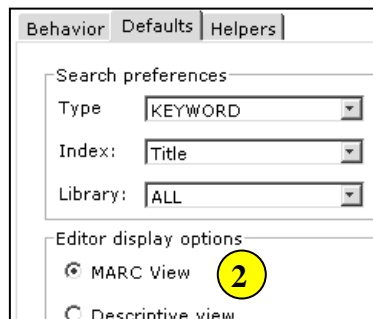
1. **Click** on Cataloging Wizard.

2. **Set properties**



- **Right Click** on the Modify Title Wizard.
- **Change** the properties to MARC View.

**Click** on Modify Title Wizard.  
*Modify Title:* screen displays.



3. **Locate** the title you want to modify. **Click** Modify.

*Modify Title* screen displays.

4. **Update or add an 040 tag.**

- Add subfield d ( |d ) with your LC/NUC code to the 040 tag. There can be more than one |d.
- If you do not know your code, it can be found at <http://lcweb.loc.gov/marc/organizations/>
- If there is no 040 tag, create one and enter your code in subfield a of the 040.

Data source	003	IJPBB
Date/time stamp	005	20061012163458.0
LCCN	010	97029718
ISBN	020	0689832133 : c\$17.07
Local system #	035	(Sirsi) i9780689832130
Local system #	035	pbb00000055796
Cataloging source	040	DLC cDLC dDLC dIJPBB
LC Call Number	050	00 PZ7.C88135 bCI 2000

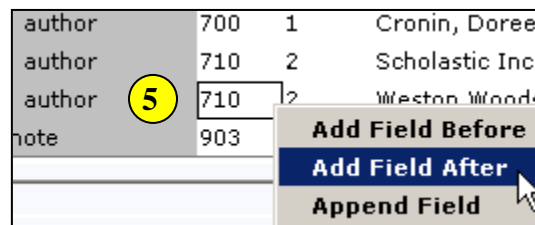
5. **Add a 590 tag – Local Note - Optional.** All of the information entered here is searchable in Workflows (general search) and the opac (all fields search). You can add any or all of the options. **BE CONSISTENT!**

- What – audio student review, podcast, book talk, etc.
- Who – teacher’s name, student name (follow your school policies)
- When – October 2009, Spring 2010
- Where – My school

Local note	590	Audio student review created in Mr. Jone’s class at Jonesville Jr. High during 2009-2010 school year.
------------	-----	---

6. **Add an 856 tag.**

- Right Click** on the last tag number lower than 856. In the sample, it is 710. If there is already an 856 tag, put this before it.
- Select** Add Field After.
- Type** 856 in the tag number box.
- Press** tab.

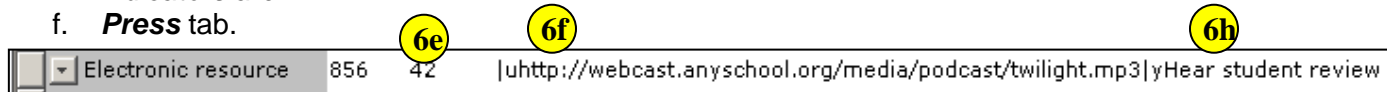




e. **Add** the indicators 42. (The 4 means it's a web resource and the 2 means it's related to the title.)

**NOTE:** *If you are copying complete tag from an outside source, you should be sure the indicators are 42.*

f. **Press** tab.



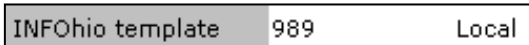
g. **Type /u** and **paste** in the url.

h. **Type /y Enter** text you want to display when you hover over the link icon in the opac. This is especially important if the record has more than one link.

i. **Click** Save.

7. **Add a 989 tag - IMPORTANT!** *This will keep your local recordings out of the CRC.*

- **Type** Local



8. **Add an Item Note** (Optional)

- **Click** on Call Number/Item Tab.
- **Add** a public note to display in the online catalog.
- You will need to add a note to each item.

LEECA High School	Copies	Item Group	Status
F ABC	1	Fiction Collection	Available
Note: Click link icon to hear a student review of this title.			

9. **Save** your changes.

**HINT:** *If you have multiple bib records for the same title, modify all of the records.*

## Cataloging eBooks

eBooks are digital reproductions of a print title or are born digital (never in print format). When cataloging eBooks you will have one of these scenarios:

1. A MARC record is available for your eBook.
2. You can find a record for the print version, but not the eBook. You need to modify the print version's record to match your eBook.
3. No record can be found for either the print version or the eBook. You'll need to catalog the eBook using the eBook Template. See *handbook, Cataloging/Advanced Cataloging/Cataloging eBooks*.

### A Marc Record is available for your eBook

1. Follow the INFOhio cataloging method by checking your own database for an existing record.
  - a. If you find a record, verify the 856 tag is correct.
  - b. If you don't find an eBook record in your database, search for a record in SmartPort.

- **Capture and save** as a NEW record. Remove oisl from the Title Control Number Source and replace it with "k". The record will load as new with a unique Title Control number. This will prevent it from overlaying another record.
- **Verify** the 856 tag is correct.
- **Add** item information. See p 4 of this document.

Title control number source: k **1b**

Indexed MARC tag number: ils

Call sources: ATDEWEYLOC,949,,

Library: LEHS

### Modify a record for the print version to match your eBook

1. If you didn't find an eBook record in SmartPort, continue searching for a print version. You can export it and then modify it.
  - a. **Locate** the print version record in SmartPort.

- b. **Capture and save** as a NEW record. Remove oisl from the Title Control Number Source and replace it with "k". The record will load as new with a unique Title Control number. This will prevent it from overlaying another record.

Title control number source: k **1b**

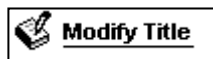
Indexed MARC tag number: ils

Call sources: ATDEWEYLOC,949,,

Library: LEHS

2. **Click** on the Cataloging Wizard.

3. **Set properties**



- a. **Right Click** on the Modify Title Wizard.
  - b. **Change** the properties to MARC View.

Behavior Defaults Helpers

Search preferences

Type: KEYWORD

Index: Title

Library: ALL

Editor display options

MARC View **3**

Descriptive view

4. **Click** on Modify Title Wizard.

*Modify Title:* screen displays.

5. **Locate** the title you want to modify. Your imported record should be the Current record. **Click** Modify.

*Modify Title* screen displays.

6. **Update or add an 040 tag.**

- a. Add subfield d ( |d ) with your LC/NUC code to the 040 tag. There can be more than one |d.
- b. If you do not know your code, it can be found at <http://lcweb.loc.gov/marc/organizations/>
- c. If there is no 040 tag, create one and enter your code in subfield d of the 040.
  - i. Click on the tag number lower than 040.
  - ii. Right click and select Add Field After.
  - iii. Type 040 in the box.
  - iv. Tab to the contents area and enter |d plus your code.

Data source	003	IJPBB
Date/time stamp	005	20061012163458.0
LCCN	010	97029718
ISBN	020	0689832133 : c\$17.07
Local system #	035	(Sirsi) i9780689832130
Local system #	035	pbb00000055796
Cataloging source	040	DLC cDLC dDLC dIJPBB
LC Call Number	050 00	PZ7.C88135 bcl 2000

7. **Add a 655 tag – genre**

- a. Right click where you want the 655 tag, add a field, and type 655. There can be more than one 655 tag, so even if there is already a 655 tag, add a new one.
- b. Tab to the indicator box. First indicator is blank, second indicator is zero ( 0 ).
- c. In the Contents area, **type** Electronic books.

Genre index term	655	0	Electronic books.
------------------	-----	---	-------------------

8. **Add a 690 tag.**

- a. Right click where you want the 690 tag, add a field, and type 690. There can be more than one 690 tag, so even if there is already a 690 tag, add a new one.
- b. In the Contents area, **type** eBook|2local.

Local subject	690	eBook 2local.
---------------	-----	---------------

9. **Add an 856 tag.** (If there already is an 856, be sure it links where you want. If not, add a new 856 above it.)

- a. Right **Click** on the last tag number lower than 856. In the sample, it is 710. If there is already an 856 tag, put this before it.
- b. **Select** Add Field After.
- c. **Type** 856 in the tag number box.
- d. **Press** tab.
- e. **Add** the indicators 40. (The 4 means it's a web resource and the 0 means it's the actual resource .)
- f. **Press** tab.
- g. **Type** |u and **paste** in the url.

author	700	1	Cronin, Doreen
author	710	2	Scholastic Inc.
author	710	2	Weston Woods
note	903		

*h.* **Type /j** and **enter** text you want to display when you hover over the link icon in the opac. This is especially important if the record has more than one link. (ex. /jRead eBook)

**NOTE:** *The hover display is not working yet, but continue adding /j to your records so they'll be ready when this enhancement is complete.*

Electronic resource	856	40	uhttp://www.america.gov/media/pdf/books/free-at-last.pdf yRead online
INFOhio template	989		Derived Record

**10. Add a 989 tag - IMPORTANT!**

1. **Type** Derived Record

11. **Click** Save.

**Add an item and call number**

Even though you do not have a physical item, you should assign a dumb barcode to your eBooks.

1. You can change the call number from XX to EBOOK. This displays nicer in CAT and makes it more obvious it is an eBook.
2. Call numbers options can include:
  - a. EBOOK
  - b. EBOOK FIC ABC
  - c. EBOOK 123.45 ABC
  - d. EBOOK BIO LINCOLN
3. Making the item group EBOOK, will allow students to do a search in CAT 2.0 – no search term needed to display all eBooks. Doing a general or all fields search for ebook, will bring up records with an eBook isbn included, whether or not your item is an eBook.
4. Making the material type EBOOK will change the icon in CAT.
5. The item will indicate the building for the eBook, i.e. it may be for elementary rather than high school.
6. You have the option of adding a public note.
7. You will be able to run a shelflist to get a list of all your eBooks.

#1 2008


**EBOOK 323.1 FRE**


**Free at last [electronic resource] : the U.S. civil rights movement**  
 Friedman, Michael Jay.  
 Washington D.C. : U.S. Dept. of State, Bureau of International Information Programs, 2008.  
 67 p. : ill. (some col.), col. map ; 28 cm.

<b>Copies at</b>	<b>Available</b>	<b>Total</b>	<input type="button" value="Show Details"/>
LEECA High School	1	1	

Brief Description
Full Description

**Free at last [electronic resource] : the U.S. civil rights movement**  
Friedman, Michael Jay.

**Physical descrip:** 67 p. : ill. (some col.), col. map ; 28 cm.  
**Item info:** 1 copy AVAILABLE at LEECA High School.  
**A Look Inside:** 

**Holdings**  CHANGE

LEECA High School	Copies	Item Group	Status
EBOOK 323.1 FRE	1	Electronic book collection	Available

**6**

Note: Click link icon to read the eBook.

## eBook Overview

### Terminology

**eBook:** for INFOhio documentation purposes, **eBook** appearing in this format refers to eBooks cataloged by INFOhio personnel and held in the INFOhio ERES database. INFOhio eBooks are accessible through the online catalog (CAT) and the Discovery Portal (*not to be cataloged into the individual libraries*).

**ebook:** a book composed in or converted to digital format for display on a computer screen or handheld device. For INFOhio documentation purposes, **ebook**, appearing in this format, is a **purchased** item, cataloged by library staff for circulation within their libraries.

**ebook reader:** A handheld device specialized for reading electronic books.

### Circulation/Cataloging Options

One ebook reader can hold multiple titles, so locating titles in the OPAC is an important consideration when determining how to catalog an ebook reader and ebook titles. The cataloging method chosen will depend on personal preference and ease of cataloging/maintenance as it pertains to each individual circumstance. Other items to consider include how you wish to have the items circulate, ease of searching for contents, and time involved in creating and maintaining the ebook collection.

There are three recognized methods for cataloging ebook readers and item contents:

1. Catalog each ebook reader as a piece of equipment, adding a 505 contents note tag to include each title contained on the ebook reader and a separate 700 added author tag for each author. Consider when adding price – do you want to include cost of ebooks also? Will you update price each time a new title is added?

Circulation/Search considerations:

When searching for a title in your catalog (CAT), the ebook reader version of the book will appear in title or author search results. However, since there is no subject or series information for these titles, the search options are limited.

When circulating the ebook reader, regardless of the number of ebooks/items that are cataloged on the device, it counts as one circulation.

2. Catalog the ebook reader as a piece of equipment, cataloging each ebook/item and creating a circulation set.

Circulation/Search considerations:

Since the ebook reader will circulate as a set, the ebook reader and all the ebooks/items cataloged on the device will circulate when a single item is scanned during checkout.

Example: if there are 6 ebooks on the ereader, it will count as 7 circulations

Search results will be more accurate since students will be able to perform any type of search and get the appropriate results.

Value will be more accurate since the ereader and all titles will have prices.

3. Catalog each title with its own full record and insert a note field that indicates which ereader(s) contain that title (ex. ebook is on Nook #3 and Kindle #2) .

Circulation/Search considerations:

Only the device is checked out, counting as one circulation.

Search results will be more accurate since students will be able to perform any type of search and get the appropriate results. However, the librarian will have to maintain a separate record keeping system to track which titles are on which devices.









<b>Options</b>	<b>Cataloging</b>	<b>Circulation</b>	<b>Circulation Stats</b>	<b>Searching Considerations</b>
Equipment with content on one record	Catalog the ereader and list titles loaded on it in a 505 tag.	Check out the ereader.	Counts as one circulation.	Titles may not come up in a subject search.
Separate equipment and content records	Catalog the device and each ebook separately with a detailed marc record.	Create a circ set. Scan just the ereader at checkout.	Counts as multiple circulations with one scan.	Subject or series searches will bring up these titles.
Separate equipment and content records	Catalog the device and each ebook with a detailed marc record. Put a note in the item record to indicate device containing the ebook.	Check out the ereader.	Counts as one circulation.	Librarian can't easily identify all the titles on each ereader while using Workflows.

**Tips for cataloging:**

1. Review circulation policies prior to determining which item group to use for ebook reader devices.
2. If using holds, review holds policies with your ITC staff, especially if you intend to allow patrons to place holds on ereader devices.
3. Do **NOT** create a record for an ebook title by adding a new call number to an existing title/record. This can create unforeseen circumstances when placing holds. *Be sure ebooks are on a separate record!*
4. Item Groups appropriate for ebooks and devices:

EBOOK – ebook Collection  
EREADER – ereader Collection  
EQUIPMENT – Equipment

5. Material Types appropriate for ebooks and devices:

<b>Material Types</b> (Images that display in Cat/Cat Jr.):			
AUDIODEV	Dedicated Audio Device		
DIGITALDEV	Digital Device		
EBOOK	E-Book		
ELECRESRCE	Electronic Resource		

Examples of item groups and material types when cataloging specific item types:

**Playaways**

Item group – AUDIOBOOK  
Material type – AUDIODEV (vs. CD or Cassette)

**iPod or MP3 Player**

Item group – EQUIPMENT  
Material type – AUDIODEV

**eReaders, such as Nook, Kindle, etc.**

Item group – EREADER  
Material type – DIGITALDEV

***See online manual for specifics of cataloging – Advanced Cataloging***



### Duplicate Title

The Duplicate Title wizard allows you to create a new bibliographic record by copying and then making changes to an existing record.

**NOTE:** INFOhio **does not recommend** using this wizard except as specified in the equipment template documentation. If you cannot find a record for your item, follow the directions in *Cataloging with Templates* for adding a new record to your database with a template. This will ensure that you have the leader and fixed fields filled out correctly. This also formats the major fields for you. The *Guidelines for Derived Cataloging* are included in the *Cataloging* section. However, by the time you make all the required changes, plus research how to enter fields you need, you'll find the template option to be faster and more accurate.

1. **Click** on Cataloging Wizard.
2. **Click** on the Duplicate Title Wizard.



**NOTE:** Set Properties may display as the first step. Press Enter to accept the default values or enter desired default values for this record.

*Duplicate Title:* screen displays.

3. **Locate** the title you want to duplicate.

4. **Click** duplicate.

*Duplicate Title* screen displays.

5. **Make changes** to required fields on the Bibliographic Tab (as directed in guidelines for Derived Cataloging document)

6. **Make changes** to fields needed to match the record to your item. Use helpers to add or delete fields.

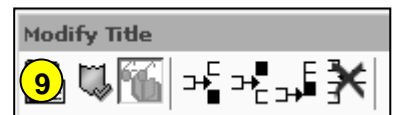
7. **Click** on Call Number/Item Tab.

8. **Enter** item and call number information as needed.

Rec_Type	Bib_Lvl	TypeCtrl
a	m	
Desc	Entrd	Dat_Tp
a	031104	s
Date2	Ctry	Illus
	nyu	a
Repr	Cont	GovtPub
Festschr	Indx	Fiction
0	0	f
Lang	Mod_Rec	Source
eng		

Tag	Ind.	Contents
001		ocm54205779
003		OCoLC
005		20050304060402.0
010		2003024090
020		0803729936 (hardcover) : c\$15.99
037		bJunior Library Guild nhttp://www.juniorlibraryguild.com
040		DLC cDLC dTEF
042		lcac
049		LCBJ
050	00	PZ7.N15 bSI 2005

9. Use the Validate Headings helper to validate authority entries and headings. See Authority Section 13.2 for detailed instructions.



10. **Save** your changes.

**NOTE:** Do not make any changes on the Control Tab.

**NOTE:** *Before you duplicate a title, please consult the Creating Derived Records tip sheet found in the Handbook under Cataloging, Guidelines.*

***Follow the Guidelines for Derived Cataloging.***

1. **Click** on Cataloging Wizard.
2. **Click** on the Duplicate Title Wizard.
3. **Locate** the title you want to duplicate.
4. **Click** duplicate.
5. **Make changes** to required fields on the Bibliographic Tab
6. **Make changes** to fields needed to match the record to your item. Use helpers to add or delete fields.
7. **Click** on Save before going to Call Number/Item Tab.
8. **Enter** item and call number information as needed

**NOTE:** *Do not make any changes on the Control Tab.*

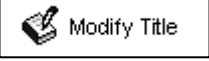

## Adding a Title Using Template Records - Overview

Template records will allow you to catalog items that do not have a marc record currently available. The records have the leader and tags correctly formatted for you. This will allow them to display correctly and hyperlinked fields will link as they should. They are designed so the librarian can make them as detailed or brief as desired. There are three types of template records:

1. **Original Record Templates** – use these for **commercially published** materials that don't have records available in any of the SmartPort databases. These will probably be old materials or items from a small publisher.
2. **Local Records** – Use these templates for items that were **created locally**. These are items that have not been published commercially.
  - a. **School / Community Book** – for books that were created locally such as books written by students, staff, or community members.
  - b. **School Curriculum Guides** – for curriculum guides and course of study items that have been prepared specifically for your district.
  - c. **School / Community DVD** – for DVD recordings of school / local activities such as graduation, football games, community parade, or speakers.
  - d. **School Literary Magazine** – for compilation of student produced poetry, short stories, essays and art work.
  - e. **School Newsletter** – for district or building produced newsletters.
  - f. **School Newspaper** – for student produced newspapers and subscription publications.
  - g. **School / Community Video** – for video recordings of school / local activities such as graduation, football games, community parade, or speakers.
  - h. **School Yearbook** – for yearbooks or other annuals.
3. **Equipment Records** – Use these templates to catalog your equipment.

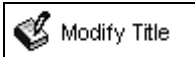
**NOTE:** *Even though you will be adding a title to your database, you will be using the Modify Title wizard.*

1. The first time you do this, you'll want to **set** your properties. **Right click** on Modify Title Wizard. **Click** on Properties.
  - **Bullet** NEVER.
  - **Check** Display descriptive labels.
2. **Use** SmartPORT to **locate** a template record for your item. All templates are in the Template database. If you need directions to use SmartPORT, see Section 11.8 of this manual.
3. **Import** the record to your database.

4.  **Click** on the Modify Title Wizard. Your record should be the “current title.”
5. **Follow** the appropriate directions for modifying the template to match your item. Each type of template has specific directions.
- Be sure to remove any unwanted tags by using the Delete Current Field helper. 
  - There should be no XXXs displaying in your completed records.
  - When deleting only parts of a tag, watch the punctuation carefully.
  - Be sure each template you complete has a 989 tag. These will help you locate your records if needed later.
6. **Complete** the cataloging process by adding item and call number information. See *Call Number/Item Maintenance guide in handbook for details, if needed.*

### Local Book Template

1. Use SmartPORT (TEMPLATE database) to **locate** the record. Do a Title Search for “Local School Book Template”.
2. **Import** the record (See Handbook, Cataloging, Basic Cataloging/SmartPort guides for specific directions).



3. **Click** on Modify Title Wizard - record should be “current”.

4. **Make** the following changes and additions to the record:

**Fixed Fields:**

- ❑ **Entrd**-- change to current date in format YYMMDD.
- ❑ **Date1** -- Enter publication year date.

Rec_Type	a	Bib_Lvl	m	TypeCtrl		Enc_Lvl	u
Desc	a	Entrd	070207	Dat_Tp	s	Date1	
Date2		Ctry	ohu	Illus		Audience	
Repr		Cont		GovtPub		ConfPub	0
Festschr	0	Indx	0	Fiction		Biog	
Lang	eng	Mod_Rec		Source	d		

**Bibliographic Info:**

- ❑ **100** -- DELETE text and enter author’s name, last name first.
- ❑ **245** -- EDIT **Delete** “Local School Book Template.” **Enter** Title of book.

Label	Tag	Ind.	Contents
Personal Author	100	1	LAST NAME, FIRST NAME, dDATES.
Title	245	10	LOCAL SCHOOL BOOK TEMPLATE.
Publication info	260		cDATE.
Physical descrip	300		XX p. : bill., col. ; cXX cm.
General Note	500		Prepared by XXXX.
Summary	520		XXXXXXXXXXXXX.
Issuing body	550		Issued by XXXX.
Personal subject	600	14	XXXXXXXXXXXXX.
Subject term	650	0	Student publications.
Subject term	650	0	XXXXXXXXXXXXX.
Geographic term	651	4	XXXXXXXXXXXXX.
Added author	710	2	XXXXXXXXXXXXX.
INFOhio template	989		Local Publication

**NOTE:** 2nd indicator contains the number of non-filing characters for the leading article in title.

The = 4 An= 3 A = 2 If there is no initial article, leave the zero ( 0 )  
 Examples: **245 14** The Nutcracker.  
**245 10** Dumbo Makes a Splash!

- ❑ **260 |c** Replace “DATE” with date of publication. This should be the same as Date1 above.  
Example: **|c1998.**
- ❑ **300** EDIT – Replace XX with page number.  
**|c** Replace XX with the height in centimeters.
- ❑ **500** Replace XXXX with a note on creator(s) or DELETE.
- ❑ **520** Replace XXXX with a summary or DELETE.
- ❑ **550** Replace XXXX with the issuing body or DELETE. This should include a statement of responsibility for any person or group not included elsewhere in the record.

- ❑ **600** Replace XXXX with name of a personal subject (last name first) or DELETE.
- ❑ **650** Replace XXXX with any subjects. See manual 12.6d for details on adding subjects.
- ❑ **651** Replace XXXX with a subject if it's a geographical location or DELETE.
- ❑ **710** EDIT -- Replace XXXX with the name of the school and location if applicable or DELETE. End with a period or parenthesis.  
Example: Pretend Elementary School (Utopia, OH)
- ❑ **710** EDIT -- Replace XXXX with the name of the school **district** and location. End with a period or parenthesis.  
Example: Utopia Local Schools (Utopia, OH)
- ❑ **989 - DO NOT DELETE!**

5. **Click** Save when done.



6. **Click** on the Call Number / Item Maintenance Wizard. **Add** item and call number information to complete the cataloging process. (See *Handbook, Call Number/Item Maintenance guide for detailed directions.*)


**Completed Record:**

Rec_Type	a	Bib_Lvl	m	TypeCtrl		Enc_Lvl	u
Desc	a	Entrd	070210	Dat_Tp	s	Date1	2010
Date2		Ctry	ohu	Illus		Audience	
Desc		Cont		ContPub		ContPub	0

	Label	Tag	Ind.	Contents
▼	Personal Author	100	1	Baker, Sarah.
▼	Title	245	10	Mrs. Baker's class explores Lake Erie.
▼	Publication info	260		c2010.
▼	Physical descrip	300		35 p. : bill., col. ; c20 cm.
▼	General Note	500		Prepared by Mrs. Baker's third grade class.
▼	Summary	520		Includes student writings and pictures of their field trip to Kely's Island and the Perry Monument.
▼	Issuing body	550		Issued by Narnia County Gifted Program.
▼	Personal subject	600	14	Perry, William.
▼	Subject term	650	0	Student publications.
▼	Subject term	650	0	Monuments & memorials 1810 - 1840.
▼	Geographic term	651	4	Lake Erie.
▼	Added author	710	2	Pretend Elementary (Utopia, OH)
▼	Added author	710	2	Utopia Local Schools (Utopia, OH)
▼	INFOhio template	989		Local Publication

### Curriculum Guide Template

1. Use SmartPORT (TEMPLATE database) to **locate** the record. Do a Title Search for “Local School Curriculum Guide Template”.
2. **Import** the record. (See *Handbook, Cataloging, Basic Cataloging/SmartPort guides for specific directions*).
3.  **Modify Title** **Click** on Modify Title Wizard - record should be “current”.
4. **Make** the following changes and additions to the record:

**Fixed Fields:**

- ❑ **Entrd**-- change to current date in format YYMMDD
- ❑ **Date1** – Enter publication date.

**Bibliographic Info:**

- ❑ **245—Delete** “Local School Curriculum Guide Template.”  
**Enter** Title of guide.  
  
2nd indicator contains number of non-filing characters for leading article in title.  
The = 4    An= 3  
A = 2  
If no initial article, leave the zero ( 0 ).

Rec_Type	a	Bib_Lvl	m	TypeCtrl		Enc_Lvl	u
Desc	a	Entrd	070207	Dat_Tp	s	Date1	
Date2		Cont		Illus		Audience	
Repr		GovtPub		ConfPub			0
Festschr	0	Indx		Fiction	0	Biog	
Lang	eng	Mod_Rec		Source	d		

	Label	Tag	Ind.	Contents
	Date/time stamp	005		20070215153220.0
	Title	245	00	LOCAL SCHOOL CURRICULUM GUIDE TEMPLATE.
	Publication info	260		cDATE.
	Physical descrip	300		XX p. : bill. ; cXX cm.
	General Note	500		Prepared by the district curriculum director.
	Summary	520		Includes content standards, benchmarks, and indicators. Reviewed on a five year rotation.
	Issuing body	550		XXXXXXXXXX.
	Subject term	650	0	XXXXXXXXXX xStudy and teaching.
	Added author	710	2	XXXXXXXXXX.
	Electronic resource	856	40	uhttp://XXX.XXXXX.XX/ yDISPLAY TEXT.
	Internet site	856	2	uCURRICULUM GUIDE URL
	INFOhio template	989		Local Publication

Examples: **245 04** The Amherst Technology Curriculum.  
**245 00** Social Studies Curriculum Guide.

- ❑ **260 |c** Enter date of publication. This should be the same as Date1.  
Example: **|c1998**.
- ❑ **300** Replace XX with page number.  
**|c**—Replace XX with height in centimeters.
- ❑ **500** Enter note on creators or DELETE.
- ❑ **520** EDIT summary if needed, or DELETE.
- ❑ **550** Replace XXXX with issuing body or DELETE. This should include a statement of responsibility for any person or group not included elsewhere in the record.
- ❑ **650** EDIT – Replace XXXX with subject area.

- ❑ **710** EDIT -- Replace XXXX with the name of the school and location. End with a period or parenthesis.

Example: Utopia Local Schools (Utopia, OH)

- ❑ **856** Replace "Curriculum Guide URL" with the web address of guide if appropriate or DELETE.  
Example: |uhttp://www.utopia.org/curriculum

- ❑ **989** Do not delete!

5. **Click** Save when done.

6. **Click** on the Call Number / Item Maintenance Wizard. Add item and call number information to complete the cataloging process. (See *Handbook, Cataloging, Call Number/Item Maintenance guide for detailed directions.*)

**Completed Record:**

Rec_Type	a	Bib_Lvl	m	TypeCtrl		Enc_Lvl	u
Desc	a	Entrd	070210	Dat_Tp	s	Date1	2010
Date2		Ctry	ohu	Illus		Audience	
Repr		Cont		GovtPub		ConfPub	0
Festschr	0	Indx		Fiction	0	Biog	
Lang	eng	Mod_Rec		Source	d		

Label	Tag	Ind.	Contents
key	001		105-2123943
Date/time stamp	005		20070215153220.0
Title	245	00	Social Studies curriculum guide.
Publication info	260		c2010.
Physical descrip	300		410 p. : bill. ; c25 cm.
General Note	500		Prepared by the district curriculum director and members of the district social studies department.
Summary	520		Includes content standards, benchmarks, and indicators. Reviewed on a five year rotation.
Issuing body	550		Issued by School Improvement Committee.
Subject term	650	0	Social Studies xStudy and teaching.
Added author	710	2	Utopia Local Schools (Utopia, OH)
Internet site	856	2	uhttp://www.utopia.org/curriculum
INFOhio template	989		Local Publication



**Local DVD Template**

1. Use SmartPORT (TEMPLATE database) to **locate** the record. Do a Title Search for "Local School DVD Template".
2. **Import** the record (See Handbook, Cataloging, Basic Cataloging/SmartPort guides for specific directions).



3. **Click** on Modify Title Wizard - record should be "current".

4. **Make** the following changes and additions to the record:

Rec_Type	g	Bib_Lvl	m	TypeCtrl		Enc_Lvl	u
Desc	a	Entrd	070207	Dat_Tp	s	Date1	
Date2		Ctry	ohu	Time		Audience	

	Label	Tag	Ind.	Contents
	Fixed field data	007		vd* v  z
	Local system #	035		UC105-2123937
	Title	245	00	LOCAL SCHOOL DVD TEMPLATE  h[videorecording]
	Publication info	260		cDATE.
	Physical descrip	300		1 videodisc (XX min.) :  bsd., col. ; c4 3/4 in. + eXXXX.
	General Note	500		Prepared by XXXX.
	Summary	520		XXXXXXXXXXXXXX.
	Technical details	538		DVD format.
	Issuing body	550		Issued by XXXX.
	Personal subject	600	14	XXXX
	Subject term	650	0	XXXX
	Geographic term	651	4	XXXXXXXX
	Added author	710	2	XXXX
	Added author	710	2	XXXX
	INFOhio template	989		Local Publication

**Fixed Fields:**

- ❑ **Entrd** -- change to current date in format YYYYMMDD.
- ❑ **Date1** -- Enter publication date.
- ❑ **007** -- Do **not** make any changes! Do **not** delete!

**Bibliographic Info:**


- ❑ **245** -- EDIT **Delete** "Local School DVD Template." **Enter** Title of DVD. **Do not delete** |h[videorecording]

**NOTE:** 2nd indicator contains the number of non-filing characters for the leading article in title.  
The = 4    An= 3    A = 2    If there is no initial article, leave the zero ( 0 ).  
Examples: **245 04** The Nutcracker  
**245 00** Dumbo Makes a Splash!

- ❑ **260 |c** EDIT -- Replace "DATE" with date of publication. This should be the same as Date1.  
Example: |c1998.
- ❑ **300** EDIT – Replace XX with number of minutes.  
|e Replace XXXX with any accompanying materials or DELETE +|eXXXX.
- ❑ **500** Replace XXXX with a note on creator(s) or DELETE.
- ❑ **520** Replace XXXX with a summary or DELETE.
- ❑ **538** Do not delete!

- ❑ **550** Replace XXXX with the name of the group who issued or paid for the production or DELETE.  
Example: A concert by the show band would be issued by the Music Dept., Booster Club, etc.
- ❑ **600** Replace XXXX with name of a personal subject (last name, first name) or DELETE.
- ❑ **650** Replace XXXX with any subjects or DELETE. See manual 12.6d for details on adding subjects.
- ❑ **651** Replace XXXX with a subject if it's a geographical location or DELETE.
- ❑ **710** EDIT -- Replace XXXX with the name of the school and location if applicable or DELETE.  
Example: Misty Middle School (Utopia, OH) End with a period or parenthesis.
- ❑ **710** EDIT -- Replace XXXX with the name of the school **district** and location. End with a period or parenthesis.  
Example: Utopia Local Schools (Utopia, OH)

5. **Click** Save when done.

6.  **Call Number/Item Maint** **Click** on the Call Number / Item Maintenance Wizard. **Add** item and call number information to complete the cataloging process. (See *Handbook, Cataloging, Call Number/Item Maintenance guide* for detailed directions.)


**Completed Record:**

Rec_Type	g	Bib_Lvl	m	TypeCtrl		Enc_Lvl	u
Desc	a	Entrd	070210	Dat_Tp	s	Date1	2010
Date2		Ctry	ohu	Time		Audience	
GovtPub		Form of item		Type_Mat	v	Tech	
Lang	eng	Mod_Rec		Source	d		

Label	Tag	Ind.	Contents
Fixed field data	007		vd* v  z
Title	245	00	M. E. Kerr visits Utopia Local Schools[h[videorecording].
Publication info	260		c2010.
Physical descrip	300		1 videodisc (75 min.) : bsd., col. ; c4 3/4 in.
General Note	500		Prepared by FHS Television Studio.
Summary	520		M. E. Kerr speaks with students at Misty Middle School.
Technical details	538		DVD format.
Issuing body	550		Issued by Utopia Local Schools.
Personal subject	600	14	Kerr, M. E.
Subject term	650	0	Authorship anecdotes.
Added author	710	2	Misty Middle School (Utopia, OH)
Added author	710	2	Utopia Local Schools (Utopia, OH)
INFOhio template	989		Local Publication

### Local Literary Magazine Template

1. Use SmartPORT (TEMPLATE database) to **locate** the record. Do a Title Search for "LOCAL SCHOOL LITERARY MAGAZINE TEMPLATE".
2. **Import** the record (See Handbook, Cataloging, Basic Cataloging/SmartPort guides for specific directions).
3.  **Click** on Modify Title Wizard - record should be "current".
4. **Make** the following changes and additions to the record:

**Fixed Fields:**

- Entrd--**  
change to current date in format YYMMDD
- Dat\_Tp--**  
change to **d** if publication has ceased.
- Date1--**  
Beginning publication date, if not known, estimate. Replace the unknown digits with the letter 'u.'  
Ex: 19uu.
- Date 2--** If publication has ceased change to date of last publication.

Rec_Type	a	Bib_Lvl	s	TypeCtrl		Enc_Lvl	u
Desc	a	Entrd	070207	Dat_Tp	c	Date1	
Date2	9999	City	ohio	Frequ		Regdir	
Ser_Type		Phys_Med		Repr		Pub_Type	
Cont		GovtPub		ConfPub	0	Alphabt	a
SLI_Ent		Lang	eng	Mod_Rec		Source	d

	Label	Tag	Ind.	Contents
	Title	245	00	LOCAL SCHOOL LITERARY MAGAZINE TEMPLATE.
	Publication info	260		cDATE.
	Physical descrip	300		v. : bill. ; cxx cm.
	Current frequency	310		Annual
	Volume/date range	362	1	DATE.
	General Note	500		Prepared by the student literary magazine staff.
	Summary	520		Includes student produced poetry, short stories, essays and art work.
	Issuing body	550		Issued by XXXX.
	Subject term	650	0	Student newspapers and periodicals.
	Added author	710	2	XXXXXXXXXXXX.
	Added author	710	2	XXXXXXXXXXXX.
	INFOhio template	989		Local Publication

**Bibliographic Info:**

- 245 Delete** "LOCAL SCHOOL LITERARY MAGAZINE TEMPLATE."  
**Enter** Title of publication.  
2nd indicator contains number of non-filing characters for leading article in yearbook title.  
The = 4    An= 3    A = 2    If no initial article, leave the zero ( 0 )  
Examples: **245 04** The Amherstonian.  
**245 00** Panorama.
- Use either 260 or 362 tag**  
**260 |c** Enter date of first publication if known or DELETE the tag.  
Example: **|c1932-** or if publication ceased **|c1932-1990.**  
  
**362** If 260 is deleted, enter date of earliest available volume. Delete tag if not needed.  
Example: **362 1985-**

- ❑ **300** Edit |c – Replace XX with height in centimeters. Example: |c 27 cm.
- ❑ **310** Edit if needed.
- ❑ **500** Edit if desired.
- ❑ **520** Edit if desired.
- ❑ **550** Replace XXXX with the name of the school.
- ❑ **650** Edit if desired.
- ❑ **710** Replace XXXX with the name of the school and location (if applicable) or DELETE.
- ❑ **710** Replace XXXX with the name of the school **district** and location.
- ❑ **989** DO NOT DELETE!

5. **Click** Save when done.

6. **Click** on the Vol/Copy tab or Add Volume Wizard. Add item and call number information to complete the cataloging process. (See *Handbook, Cataloging, Call Number/Item Maintenance guide for detailed directions.*)


**Completed Record:**

Rec_Type	a	Bib_Lvl	s	TypeCtrl		Enc_Lvl	u
Desc	a	Entrd	070207	Dat_Tp	c	Date1	
Date2	9999	Ctry	ohu	Frequ		Regulr	
Ser_Type		Phys_Med		Repr		Pub_Type	
Cont		GovtPub		ConfPub	0	Alphabt	a
SLI_Ent		Lang	eng	Mod_Rec		Source	d

	Label	Tag	Ind.	Contents
▼	Title	245	00	Thoughts and Reflections.
▼	Publication info	260		c1982 -
▼	Physical descrip	300		v. : bill. ; c27 cm.
▼	Current frequency	310		Annual
▼	General Note	500		Prepared by the student literary magazine staff.
▼	Summary	520		Includes student produced poetry, short stories, essays and art work.
▼	Issuing body	550		Issued by Fantasy High School.
▼	Subject term	650	0	Student newspapers and periodicals.
▼	Added author	710	2	Fantasy High School (Utopia, OH)
▼	Added author	710	2	Utopia Local Schools (Utopia, OH)
▼	INFOhio template	989		Local Publication

**Local School Newsletter Template**

1. Use SmartPORT (TEMPLATE database) to **locate** the record. Do a Title Search for "LOCAL SCHOOL NEWSLETTER TEMPLATE".
2. **Import** the record (See Handbook, Cataloging, Basic Cataloging/SmartPort guides for specific directions).
3.  **Click** on Modify Title Wizard - record should be "current".
4. **Make** the following changes and additions to the record:

**Fixed Fields:**

- ❑ **Entrd**-- change to current date in format YYMMDD
- ❑ **Dat\_Tp**-- change to **d** if publication has ceased.
- ❑ **Date1**-- Beginning publication date, if not known, estimate. Replace the unknown digits with the letter 'u.'  
Ex: 19uu.
- ❑ **Date 2**-- If publication has ceased change to date of last publication.

Rec_Type	a	Bib_Lvl	s	TypeCtrl		Enc_Lvl	u
Desc	a	Entrd	070207	Dat_Tp	c	Date1	
Date2	9999	Ctry	ohu	Frequ		Regulr	
Ser_Type		Phys_Med		Repr		Pub_Type	
Cont		GovtPub		ConfPub	0	Alphabt	a
SLI_Ent		Lang	eng	Mod_Rec		Source	d

	Label	Tag	Ind.	Contents
	Title	245	00	LOCAL SCHOOL NEWSLETTER TEMPLATE.
	Publication info	260		cDATE.
	Physical descrip	300		v. : bill. ; cXX cm.
	Current frequency	310		FREQUENCY
	Volume/date range	362	1	DATE.
	General Note	500		Prepared by XXXX.
	Summary	520		Includes articles and photographs regarding school events and activities.
	Issuing body	550		Issued by XXXX.
	Subject term	650	0	Newsletters.
	Added author	710	2	XXXXXXXXXXXX.
	Added author	710	2	XXXXXXXXXXXX.
	Electronic resource	856	40	uhttp://XXX.XXXXX.XX/ yDISPLAY TEXT.
	Internet site	856	1	uNEWSLETTER URL
	INFOhio template	989		Local Publication

**Bibliographic Info:**

- ❑ **245 Delete** "LOCAL SCHOOL NEWSLETTER TEMPLATE."  
**Enter** Title of publication.  
2nd indicator contains number of non-filing characters for leading article in yearbook title.  
The = 4    An= 3    A = 2    If no initial article, leave the zero ( 0 ).  
Examples: **245 04** The Amherstonian.  
**245 00** Panorama.
- ❑ **Use either 260 or 362 tag**  
**260 |c** Enter date of first publication if known or DELETE the tag.  
Example: |c1932-    or if publication ceased |c1932-1990.  
**362** If 260 is deleted, enter date of earliest available volume. Delete tag if not needed.  
Example: **362** 1985-
- ❑ **300** Edit |c – Replace XX with height in centimeters. Example: |c 27 cm.
- ❑ **310** Enter frequency.

- ❑ **500** Replace XXXX with organization responsible for content.
- ❑ **520** Edit if desired.
- ❑ **550** Replace XXXX with the name of the school.
- ❑ **650** Edit if desired.
- ❑ **710** Replace XXXX with the name of the school and location (if applicable) or DELETE.  
End with a period or parenthesis.  
Example: Pretend Elementary School (Utopia, OH)
- ❑ **710** EDIT -- Replace XXXX with the name of the school **district** and location. End with a period or parenthesis.  
Example: Utopia Local Schools (Utopia, OH)
- ❑ **856** Replace NEWSLETTER URL with web address of publication or DELETE.
- ❑ **989** DO NOT DELETE!

5. **Click** Save when done.

6. **Click** on the Vol/Copy tab or Add Volume Wizard. Add item and call number information to complete the cataloging process. (See *Handbook, Cataloging, Call Number/Item Maintenance guide for detailed directions.*)


**Completed Record:**

Rec_Type	a	Bib_Lvl	s	TypeCtrl		Enc_Lvl	u
Desc	a	Entrd	070112	Dat_Tp	c	Date1	1996
Date2	9999	Ctry	ohu	Frequ		Regulr	
ISDS		Ser_Type		Phys_Med		Repr	

Label	Tag	Ind.	Contents
key	001		105-2123944
Date/time stamp	005		20070207213712.0
Local system #	035		UC105-2123938
Title	245	04	The Dream.
Publication info	260		c1996-
Physical descrip	300		v. : bill. ; c28 cm.
Current frequency	310		Monthly (September - May)
General Note	500		Prepared by Fantasy High School PTA.
Summary	520		Includes articles and photographs regarding school events and activities.
Issuing body	550		Issued by Utopia Local Schools.
Subject term	650	0	Newsletters.
Added author	710	2	Fantasy High School (Utopia, OH)
Added author	710	2	Utopia Local Schools (Utopia, OH)
Internet site	856	1	uhttp://www.utopia.org/fantasy/PTA
INFOhio template	989		Local Publication

**Local School Newspaper Template**

1. Use SmartPORT (TEMPLATE database) to **locate** the record. Do a Title Search for "LOCAL SCHOOL NEWSPAPER TEMPLATE".
2. **Import** the record (See Handbook, Cataloging, Basic Cataloging/SmartPort guides for specific directions).
3.  **Click** on Modify Title Wizard - record should be "current".
4. **Make** the following changes and additions to the record:

**Fixed Fields:**

- ❑ **Entrd**-- change to current date in format YYMMDD
- ❑ **Dat\_Tp**-- change to **d** if publication has ceased.
- ❑ **Date1**-- Beginning publication date, if not known, estimate. Replace the unknown digits with the letter 'u.'  
Ex: 19uu.
- ❑ **Date 2**-- If publication has ceased change to date of last publication.

Rec_Type	a	Bib_Lvl	s	TypeCtrl		Enc_Lvl	u
Desc	a	Entrd	070207	Dat_Tp	c	Date1	
Date2	9999	Ctry	ohu	Frequ		Regulr	
Issue		Sec_Type	n	Phys_Med		Page	

Label	Tag	Ind.	Contents
▼ Date/time stamp	005		20070207214426.0
▼ Title	245	00	LOCAL SCHOOL NEWSPAPER TEMPLATE
▼ Publication info	260		cDATE
▼ Physical descrip	300		v. : bill. ; ccXX cm.
▼ Current frequency	310		FREQUENCY
▼ Volume/date range	362	1	DATE
▼ General Note	500		Prepared by the student newspaper staff.
▼ Summary	520		Includes editorials, articles and photographs regarding student events, activities, and interests.
▼ Issuing body	550		Issued by XXXX.
▼ Subject term	650	0	Student newspapers and periodicals
▼ Added author	710	2	XXXX
▼ Added author	710	2	XXXX
▼ Internet site	856	1	uNEWSPAPER URL
▼ INFOhio template	989		Local Publication

**Bibliographic Info:**

- ❑ **245 Delete** "LOCAL SCHOOL NEWSPAPER TEMPLATE."  
**Enter** Title of publication.  
2nd indicator contains number of non-filing characters for leading article in yearbook title.  
The = 4    An= 3    A = 2    If no initial article, leave the zero ( 0 ).  
Examples: **245 04** The Amherstonian  
**245 00** Panorama
- ❑ **Use either 260 or 362 tag**  
**260 |c** Enter date of first publication if known or DELETE the tag. This should be the same as Date1.  
Example: |c1932-    or if publication ceased |c1932-1990  
  
**362** If 260 is deleted, enter date of earliest available volume. Delete tag if not needed.  
Example: **362** 1985-
- ❑ **300 Edit |c** – Replace XX with height in centimeters. Example: |c 27 cm.

- ❑ **310** Enter frequency or DELETE.
- ❑ **500** Edit if desired.
- ❑ **520** Edit if desired.
- ❑ **550** Replace XXXX with the name of the school.
- ❑ **650** Edit if desired.
- ❑ **710** Replace XXXX with the name of the school and location (if applicable) or DELETE.
- ❑ **710** Replace XXXX with the name of the school **district** and location.
- ❑ **856** Replace NEWSPAPER URL with the web address of the publication or DELETE.
- ❑ **989** DO NOT DELETE!

5. **Click** Save when done.

6. **Click** on the Vol/Copy tab or Add Volume Wizard. Add item and call number information to complete the cataloging process. (See *Handbook, Cataloging, Call Number/Item Maintenance guide for detailed directions.*)

**Completed Record:**


Rec_Type	a	Bib_Lvl	s	TypeCtrl		Enc_Lvl	u
Desc	a	Entrd	070209	Dat_Tp	c	Date1	1982
Date2	9999	Ctry	ohu	Frequ		Regulr	
ISDS		Ser_Type		Phys_Med		Renr	

Label	Tag	Ind.	Contents
key	001		105-2123946
Date/time stamp	005		20070207213210.0
Local system #	035		UC105-2123940
Title	245	00	Thoughts and reflections.
Publication info	260		c1982 -
Physical descrip	300		v. :  bill. ; c27 cm.
Current frequency	310		Annual
General Note	500		Prepared by the student literary magazine staff.
Summary	520		Includes student produced poetry, short stories, essays and art work.
Issuing body	550		Issued by Fantasy High School.
Subject term	650	0	Student newspapers and periodicals
Added author	710	2	Fantasy High School (Utopia, OH)
Added author	710	2	Utopia Local Schools (Utopia, OH)
INFOhio template	989		Local Publication



### Local Videocassette Template

1. Use SmartPORT (TEMPLATE database) to **locate** the record. Do a Title Search for "Local School Videocassette Template".
2. **Import** the record (See Handbook, Cataloging, Basic Cataloging/SmartPort guides for specific directions).
3.  **Click** on Modify Title Wizard - record should be "current".
4. **Make** the following changes and additions to the record:

**Fixed Fields:**

- Entrd** -- change to current date in format YYMMDD.
- Date1** -- Enter publication date.
- 007** -- Do **not** make any changes! Do **not** delete!

**Bibliographic Info:**

- 245** -- EDIT  
**Delete** "Local School Videocassette Template."  
**Enter** Title of video.  
**Do not delete** |h[videorecording]

**NOTE:** 2nd indicator contains the number of non-filing characters for the leading article in title.

The = 4    An= 3    A = 2    If there is no initial article, leave the zero ( 0 ).  
Examples: **245 04** The Nutcracker  
**245 00** Dumbo Makes a Splash!

- 260** |c EDIT -- Replace "DATE" with date of publication. This should be the same as Date1.  
Example: |c1998.
- 300** EDIT – Replace XX with number of minutes.  
|e Replace XXXX with any accompanying materials or DELETE +|eXXXX.
- 500** Replace XXXX with a note on creator(s) or DELETE.


Rec_Type	g	Bib_Lvl	m	TypeCtrl		Enc_Lvl	u
Desc	a	Entrd	070207	Dat_Tp	s	Date1	
Date2		Ctry	ohu	Time		Audience	

	Label	Tag	Ind.	Contents
	Fixed field data	007		vf* b  o
	Local system #	035		UC105-2123936
	Title	245	00	LOCAL SCHOOL VIDEOCASSETTE TEMPLATE  h[videorecording]
	Publication info	260		cDATE.
	Physical descrip	300		1 videocassette (XX min.) :  bsd., col. ; c1/2 in. + eXXXX.
	General Note	500		Prepared by XXXX.
	Summary	520		XXXXXXXXXXXXXX
	Technical details	538		VHS format
	Issuing body	550		Issued by XXXX.
	Personal subject	600	14	xxxx
	Subject term	650	0	XXXX
	Geographic term	651	4	XXXXXXXX
	Added author	710	2	XXXX
	Added author	710	2	XXXX
	INFOhio template	989		Local Publication

- ❑ **520** Replace XXXX with a summary or DELETE.
- ❑ **600** Replace XXXX with name of a personal subject (last name first) or DELETE.
- ❑ **650** Replace XXXX with any subjects or DELETE.  
Use Library of Congress to locate correct subject headings.  
<http://authorities.loc.gov/>
- ❑ **651** Replace XXXX with a subject if it's a geographical location or DELETE.
- ❑ **710** EDIT -- Replace XXXX with the name of the school and location if applicable or DELETE.  
Example: Misty Middle School (Utopia, OH)
- ❑ **710** EDIT -- Replace XXXX with the name of the school **district** and location.  
Example: Utopia Local Schools (Utopia, OH)
- ❑ **989** – Do not delete!

5. **Click** Save when done.

6.  Call Number/Item Maint **Click** on the Call Number / Item Maintenance Wizard. **Add** item and call number information to complete the cataloging process. (See *Handbook, Cataloging, Call Number/Item Maintenance guide for detailed directions.*)


**Completed Record:**

Rec_Type	g	Bib_Lvl	m	TypeCtrl		Enc_Lvl	u
Desc	a	Entrd	070112	Dat_Tp	s	Date1	2006
Date2		Ctry	ohu	Time		Audience	
Accomp		GovtPub		ConfPub		Type_Mat	v

Label	Tag	Ind.	Contents
key	001		105-2123942
Date/time stamp	005		20070208074256.0
Fixed field data	007		vf* b  o
Local system #	035		UC105-2123936
Title	245	00	Fantasy High School graduation,June 3, 2006 h[videorecording].
Publication info	260		c2006.
Physical descrip	300		1 videocassette (120 min.) :  bsd., col. ; c1/2 in. + eprogram booklet.
General Note	500		Prepared by Fantasy High School Video Club.
Summary	520		Records the ceremony, speeches,and diploma distribution to 350 graduates of Class of 2006.Senator John Jones gave the commencement address.
Technical details	538		VHS format
Personal subject	600	14	Jones, John
Subject term	650	0	Commencement ceremonies
Added author	710	2	Fantasy High School (Utopia, OH)
Added author	710	2	Utopia Local Schools (Utopia, OH)
INFOhio template	989		Local Publication

**School Yearbook Template Record**

1. Use SmartPORT (TEMPLATE database) to **locate** the record. Do a Title Search for "LOCAL SCHOOL YEARBOOK TEMPLATE".
2. **Export** the record (See Handbook, Cataloging, Basic Cataloging/SmartPort guides for specific directions).
3.  **Click** on Modify Title Wizard - record should be "current".
4. **Make** the following changes and additions to the record:

**Fixed Fields:**

- ❑ **Entrd**-- change to current date in format YYYYMMDD
- ❑ **Dat\_Tp**-- change to **d** if publication has ceased.
- ❑ **Date1**-- Beginning publication date, if not known, estimate. Replace the unknown digits with the letter 'u.'  
Ex: 19uu.
- ❑ **Date 2**-- If publication has ceased change to date of last publication.

Rec_Type	a	Bib_Lvl	s	TypeCtrl		Enc_Lvl	u
Desc	a	Entrd	061113	Dat_Tp	c	Date1	
Date2	9999	Ctry	ohu	Frequ	a	Regulr	r
ISDS		Ser_Type	m	Phys_Med		Repr	

	Label	Tag	Ind.	Contents
▼	Title	245	0	LOCAL SCHOOL YEARBOOK TEMPLATE
▼	Publication info	260		cDATE
▼	Physical descrip	300		v. : bill., port. ; cXX cm.
▼	Current frequency	310		Annual
▼	Volume/date range	362		DATE
▼	General Note	500		Prepared by the student yearbook staff.
▼	Summary	520		Includes student and staff pictures; photos of teams, clubs, and events.
▼	Issuing body	550		Issued by XXXX.
▼	Subject term	650	0	School yearbooks
▼	Added author	710	2	XXXX
▼	Added author	710	2	XXXX
▼	INFOhio template	989		Local Publication

**Bibliographic Info:**

- ❑ **245 Delete** "LOCAL SCHOOL YEARBOOK TEMPLATE."  
**Enter** Title of yearbook.  
2nd indicator contains number of non-filing characters for leading article in yearbook title.  
The = 4    An= 3    A = 2    If no initial article, leave the zero ( 0 ).  
Examples: **245 04** The Amherstonian  
**245 00** Panorama
- ❑ **Use either 260 or 362 tag**
- 260 |c** Enter date of first publication if known or DELETE the tag. This should be the same as Date1 .  
Example: **|c1932-**    or if publication ceased **|c1932-1990**
- 362** If 260 is deleted, enter date of earliest available volume. Delete tag if not needed.  
Example: **362 1985-**
- ❑ **300 Edit |c** – Replace XX with height in centimeters. Example: **|c 28 cm.**

- ❑ **500** Edit if desired.
- ❑ **520** Edit if desired.
- ❑ **550** Replace XXXX with the name of the school.
- ❑ **710** Replace XXXX with the name of the school and location (if applicable).
- ❑ **710** Replace XXXX with the name of the school **district** and location.
- ❑ **989** DO NOT DELETE!

5. **Click** Save when done.

6. **Click** on the Vol/Copy tab or Add Volume Wizard. Add item and call number information to complete the cataloging process. (See *Handbook, Cataloging, Call Number/Item Maintenance guide for detailed directions.*)

**Completed Record:**

Rec_Type	a	Bib_Lvl	s	TypeCtrl		Enc_Lvl	u
Desc	a	Entrd	070212	Dat_Tp	c	Date1	1948
Date2	9999	Ctry	ohu	Frequ	a	Regulr	r
ISDS		Ser_Type	m	Phys_Med		Repr	

	Label	Tag	Ind.	Contents
▼	key	001		105-2116382
▼	Date/time stamp	005		20070207210724.0
▼	Title	245	04	The Unicorn.
▼	Publication info	260		c1948 -
▼	Physical descrip	300		v. : bill., port. ; c27 cm.
▼	Current frequency	310		Annual
▼	General Note	500		Prepared by the student yearbook staff.
▼	Summary	520		Includes student and staff pictures; photos of teams, clubs, and events.
▼	Issuing body	550		Issued by Utopia Local Schools.
▼	Subject term	650	0	School yearbooks
▼	Added author	710	2	Fantasy High School (Utopia, OH)
▼	Added author	710	2	Utopia Local Schools (Utopia, OH)
▼	INFOhio template	989		Local Publication

## Equipment Templates

### General points to keep in mind:

- You will be creating one record for each piece of equipment. This is different from cataloging other items. Normally you would put multiple copies of a title on the same record. However, if you have 5 identical overheads, you will need 5 records. This will make your record keeping much simpler in the long run.
- The templates have been designed to be used with specific types of equipment. Using the appropriate template will reduce the amount of information to be added. For example, the TV and DVD player templates include remotes on the record.
- The templates are designed to be as detailed or brief as desired. All the fields on the record do not need to be used. Any unwanted fields should be deleted with the Delete Field helper.
- All fields on this record are searchable in Sirsi by doing a General Search.
- The Fixed Fields (leader) are already formatted for you. You only need to adjust the date.
- The first three fields on the record, 024, 037, and 092 are numbers specific to each item in addition to the barcode number. This will make it easy to locate them.
- Use the 500 tag for any additional notes, description, etc. This is a good place to list included pieces – remotes, cables, etc. This field is searchable, but not hyperlinked.
- Any information you put in the 690 – local subject – is hyperlinked. There is a 690 tag on each template labeled XXXXXXXXXXXX. Use this to add any information you want to be searchable and hyperlinked – ex. Permanent location, repaired 2003, vendor name, etc.
- When deleting text, be careful that you leave any punctuation in place.
- If you have not done so already, set your properties to display descriptive labels. Right click on Modify Title > Click on Properties > Check Display descriptive labels.

Editor display options

MARC View

Descriptive view

Add empty entries

Display fixed fields

Display descriptive labels (for entries)

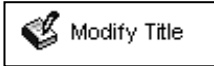
Entries template: BRIEF

**NOTE:** *If you have some equipment that you can't find a template for, you can adapt a similar one. For example, use the Television/VCR combination template for a TV/DVD/VCR unit – just add DVD to it and make modifications as needed. Another option is to use the Generic Template:*

- *Search for Generic xxxx*
- *092 – replace GEN with an appropriate call number*
- *245 – delete GENERIC TEMPLATE and add appropriate title for item*
- *Follow directions below for the remainder of the fields.*

### Creating an Equipment Record

1. Use SmartPORT, TEMPLATE database, to **locate** a template record for your item. Do a Title Search for the type of equipment and 4 X's. ex. Overhead XXXX  
If you want to see all templates search: equipment XXXX
2. **Import** the record (See handbook Basic Cataloging/SmartPort guides for specific directions).



3. **Click** on Modify Title Wizard. The record should be “current title”.
4. If you do not want your record to display in CAT, **check** Shadow Title.

5. **Make** the following changes:

**Fixed fields:**

- ❑ **Entrd**-- change to current date in format YYMMDD

**Bibliographic Info:**

- ❑ **024** Replace XXXX with serial no.
- ❑ **037** Replace XXXX with local number (school inventory, insurance number)
- ❑ **092** Leave the letters in the field. You will use them as a prefix for the call number. Replace the XXXX with the unique part of your call number.

**4**

Shadow title

Rec_Type		Bib_Lvl		TypeCtrl		Enc_Lvl
Desc		Entrd	070402	Dat_Tp		Date1

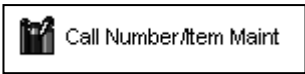
	Label	Tag	Ind.	Contents
▼	Standard identifier#	024	72	XXXX 2Serial number
▼	Stock number	037		XXXX bDistrict ID number
▼	Local Dewey call num	092		LTCP XXXX
▼	Title	245	00	Laptop computer h[equipment] : bModel XXXX / cBR
▼	Publication info	260		LOCATION : bMANUFACTURER, cDATE.
▼	General Note	500		CPU specifications: RAM XXXX; HD XXXX; drives/burr processor XXXX; speed XXXX; operating system XXX
▼	General Note	500		Peripherals: XXXXXXXXXXXX
▼	General Note	500		Wireless
▼	General Note	500		XXXXXXXXXX
▼	Technical details	538		Network: MAC address XXXX; XXXXXXXXXXXX
▼	Local subject	690	0	Audio-visual equipment
▼	Local subject	690		Battery: XXXX
▼	Local subject	690		Fiscal year: FYXXXX
▼	Local subject	690		Purchase order: XXXX
▼	Local subject	690		Repair: FYxxxx
▼	Local subject	690		XXXXXXXXXX
▼	INFOhio template	989		Equipment Record

- ❑ **245** Replace XXXX with the model number. Delete “BRAND” and replace with the brand name.
- ❑ **260** Replace the words with the appropriate information. Leave punctuation in place.  
Ex. Austin, TX :|b 3M Visual Systems Division, |c2003.
- ❑ **500** Enter any notes or delete the field.
- ❑ **538** Enter specifications or delete.
- ❑ **690** Replace XXXX with appropriate information or delete the field.

- ❑ **690** Repair: Fyxxxx – leave this field as is so it can be used in the future to enter repair year if desired. Repair specifics should be entered in the 500 tag or item staff note.
- ❑ **989** Do not make any changes! DO NOT DELETE!

6. **Click** Save and Close.

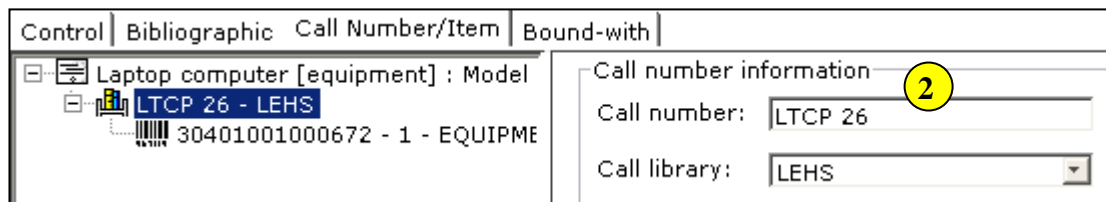
### Adding Item information for Equipment

1.  **Click** the Call number and Item Maintenance wizard. Your record will be the current title.  
(See handbook, *Call Number/Item Maintenance guide for detailed directions*)

2. **Enter** the call number from the 092 tag. Using the recommended prefix will make it easy for you to do a call number browse or sort a shelflist by call number and have all similar items display together.

Label	Tag	In...	
key	001		105-2120455
Date/time stamp	005		20070206204412.0
Standard identifie...	024	72	LP4369765 2Serial number
Stock number	037		A1707 bDistrict ID number
Local Dewey call ...	092		LTCP 26
Title	245	00	Laptop computer h[equipment]

3. **Click** Save.



4. **Click** Add Item.
5. **Enter** the item information.
6. **Click** Save and Close.

**HINTS:**

- ❑ *The Circ note will display at checkout and checkin in Java. You can enter things you want to check at those times such as “includes remote”, “cable at desk”, etc.*
- ❑ *If the item has peripherals, be sure to adjust the number of pieces.*
- ❑ *Use Staff Note to keep repair history.*

**Sample of completed equipment record:**

Rec_Type		Bib_Lvl		TypeCtrl		Enc_Lvl	
Desc		Entrd	070102	Dat_Tp		Date1	
Date2		Ctry		Illus		Audience	
Repr		Cont		GovtPub		ConfPub	

Label	Tag	Ind.	Contents
Title	245	00	Laptop computer h[equipment] : bModel Inspiron E1505 / cDell.
Publication info	260		Austin, TX : bDell,  c2006.
General Note	500		CPU specifications: RAM 512MB ; HD 120GB ; drives/burners 24X CD Burner/DVD Combo Drive ; processor Intel Core Duo ; speed 2.16GHz ; operating system Windows Vista.
General Note	500		Peripherals: power cord ; mouse
General Note	500		Wireless
General Note	500		Purchased with PTA funds 1/07 \$899
Technical details	538		Network: MAC address 00:30:6E:C7:EE:CC
Local subject	690	0	Audio-visual equipment
Local subject	690		Battery: 53 WHr 6-cell Lithium Ion
Local subject	690		Fiscal year: FY2007
Local subject	690		Purchase order: #1357
Local subject	690		Repair: FYxxxx
Local subject	690		Circulating computers
INFOhio template	989		Equipment Record

**Item information**

Item ID: <input type="text" value="30401001000672"/>	Copy number: <input type="text" value="1"/>
Type: <input type="text" value="EQUIPMENT"/>	Item library: <input type="text" value="LEHS"/>
Shelf location: <input type="text" value="AVAILABLE"/>	Current status: <input type="text" value="AVAILABLE"/>
Material type: <input type="text" value="EQUIPMENT"/>	Funding source: <input type="text" value="PTO/PTA"/>
Media desk: <input type="text"/>	Number of pieces: <input type="text" value="2"/>
Total checkouts: <input type="text" value="0"/>	Price: <input type="text" value="\$899.00"/>

Permanent:                       Circulate:

Shadow item

---

**Extended information**

Tag	Contents
CIRCNOTE	includes power cord
PUBLIC	
STAFF	



### Adding multiple pieces of identical equipment

**Scenario:** You have 10 identical overhead projectors to catalog.

**HINT:** When cataloging multiple pieces of equipment, **set** your properties first.

**Right click** on Duplicate Title > **click** on Properties.

- a. Make Type: Equipment.
- b. Make Item Category 1: Equipment.
- c. Set price and/or funding source if appropriate.

Item required default values			
Type:	EQUIPMENT	<input checked="" type="checkbox"/> Permanent	
Home location:	AVAILABLE	<input checked="" type="checkbox"/> Circulate	
		<input type="checkbox"/> Shadow item	
Item optional default values			
Price:	\$	Item category 1:	EQUIPMENT
Media desk:		Item category 2:	

1. **Complete** the cataloging process for the first item.

2.  Duplicate Title **Click** on the Duplicate Title Wizard

3. **Locate** for the record you just completed. **Click** Duplicate.

- Change** the serial number in the 024 tag.
- Change** the local ID number in the 037 tag.
- Change** the call number in the 092 tag.
- Make** any other changes needed in the bib record. **Click** Save when done.

4. "You need to provide a new item ID" message will appear. **Click** OK.

5. **Complete** the item information screen.

6. **Click** Save.

7. **Click** on the XX call number and modify it.

8. **Click** Return to Search.

9. **Repeat** steps 3 – 8 until all overheads have been cataloged. You should have 10 bib records with one item on each.

## *Uniform Titles and Collection Codes for Equipment*

*Titles in **bold** are currently in the TEMPL catalog ready to be imported through SmartPort  
Requests for additional equipment templates should be e-mailed to Central@INFOhio.org*

Uniform Title	Call Number Prefix
16mm film projector	FMPR
35mm camera	MMCM
8mm film projector	FMPR
8mm filmloop projector	FMPR
AC power adapter	MSEQ
Alternative computer keyboard	CMPR
Amplifier	SDSY
Audio/jack box	SDSY
<b>Audiocassette player</b>	<b>ACPL</b>
<b>Audiocassette player/recorder</b>	<b>ACPR</b>
<b>Audiovisual cart</b>	<b>AVCR</b>
Barcode scanner	CPPR
Battery charger	BATC
<b>Boombox</b>	<b>BBX</b>
Cable	CACO
<b>Camcorder</b>	<b>CMR</b>
<b>CD compact disc player</b>	<b>CDPL</b>
Computer	COMP
Computer Cart	CPCR
Computer disk drive	CPPR
Computer printer	CPPR
Computer scanner	CPPR
<b>Digital camera</b>	<b>DGCM</b>
<b>DVD digital video disc player</b>	<b>DVPL</b>
<b>DVD/VCR combination player</b>	<b>DVVC</b>
Electrical Cord	CACO
<b>eReader</b>	<b>EREAD</b>
Filmstrip Projector	FSPR
Filmstrip Viewer	FSV
<b>Flash drive</b>	<b>FLDR</b>
<b>Headphones</b>	<b>HDPH</b>
Interactive whiteboard	IAWB
Laminator	MSEQ
Language Master	LM

Uniform Title	Call Number Prefix
<b>Laptop computer</b>	<b>LTCP</b>
Laser disc player	LDPL
<b>Listening Center</b>	<b>LICT</b>
Microfiche Reader	MFEQ
Microfiche reader/printer	MFEQ
<b>Microphone</b>	<b>MIC</b>
Microscope	SCEQ
<b>Multimedia projector</b>	<b>MMPR</b>
Opaque projector	OPPR
Overhead Cart	OHCR
<b>Overhead projector</b>	<b>OHPR</b>
<b>Personal media player</b>	<b>PMP</b>
Photocopy machine	MSEQ
Portable Keyboard	PKB
Portable projection screen	SCRN
Receiver/Monitor	TV
Record player	RPL
Remote control	RECT
Scales	SCEQ
Scan/Converter	CMPR
Slide carousel	SLPR
Slide projector	SLPR
Smart board	CMPR
Speakers	SDSY
Switch box	CMPR
Tablet Computer	iPad
<b>Television / DVD combination</b>	<b>TVDV</b>
<b>Television / VCR combination</b>	<b>TVVR</b>
<b>Television cart</b>	<b>TVCR</b>
Tripod	MSEQ
<b>TV television</b>	<b>TV</b>
VCR videocassette player	VCPL
<b>VCR videocassette recorder</b>	<b>VCR</b>
Wall projection screen	SCRN

dated July 2012

## Equipment Cataloging Information

- All fields are searchable under "General" search.
- \* indicates recommended information
- *Italics* indicates this information will be hyperlinked

Equipment type: \_\_\_\_\_

024 \*Serial number: \_\_\_\_\_

037 District inventory number: \_\_\_\_\_

092 \*Call number: \_\_\_\_\_

245 \*Model/number: \_\_\_\_\_

245 \*Brand: \_\_\_\_\_

260 City, State: \_\_\_\_\_

260 Manufacturer company: \_\_\_\_\_

260 \*Date: \_\_\_\_\_

500 Notes: \_\_\_\_\_  
\_\_\_\_\_

690 *Bulb/battery*: \_\_\_\_\_

690 *Fiscal year*: \_\_\_\_\_

690 *Purchase order*: \_\_\_\_\_

690 *Repair: FY* \_\_\_\_\_

690 *Miscellaneous*: \_\_\_\_\_

Barcode # for item: \_\_\_\_\_

Repair record: \_\_\_\_\_  
\_\_\_\_\_

## Equipment Cataloging Information

- All fields are searchable under "General" search.
- \* indicates recommended information
- *Italics* indicates this information will be hyperlinked

Equipment type: \_\_\_\_\_

024 \*Serial number: \_\_\_\_\_

037 District inventory number: \_\_\_\_\_

092 \*Call number: \_\_\_\_\_

245 \*Model/number: \_\_\_\_\_

245 \*Brand: \_\_\_\_\_

260 City, State: \_\_\_\_\_

260 Manufacturer company: \_\_\_\_\_

260 \*Date: \_\_\_\_\_

500 Notes: \_\_\_\_\_  
\_\_\_\_\_

690 *Bulb/battery*: \_\_\_\_\_

690 *Fiscal year*: \_\_\_\_\_

690 *Purchase order*: \_\_\_\_\_

690 *Repair: FY* \_\_\_\_\_

690 *Miscellaneous*: \_\_\_\_\_

Barcode # for item: \_\_\_\_\_

Repair record: \_\_\_\_\_  
\_\_\_\_\_

*Audiocassette player -- Audiocassette player/recorder --  
Audiovisual cart -- Boombox -- Camcorder -- Compact disc player--  
Digital camera -- DVD player -- DVD/VCR combo -- Flash drive --  
Headphone -- Laptop computer-- Listening center -- Microphone --  
Multimedia projector -- Overhead projector -Television --  
Television cart -- TV/VCR combo -- VCR*

### **500 - Notes - Searchable in general search**

- \*TV / VCR / DVD / Combo -- remote control*
- \*Computer / Laptop - memory, harddrive, processor,  
network info, peripherals, mouse, keyboard, drives, wireless*
- \*Flash Drive - RAM*

### **690 - Subject - Searchable and hyperlinked**

- \*Overhead projector -- bulb*
- \*Audiocassette player/recorder -- battery*

**Item notes:** Not searchable but will display in Java circulation screen

- \*Circ note: list additional pieces signed out with equipment*
- \*Staff note: enter repair information*

### **Repair Record: (options)**

- \*Enter in 500 if you want it as a searchable note*
- \*Enter in 690 if you want to hyperlink the information  
i.e. 690 Repair record: 2003*
- \*Enter in staff note on item info which will appear on  
the Java circulation screen but is not searchable.*

*Audiocassette player -- Audiocassette player/recorder --  
Audiovisual cart -- Boombox -- Camcorder -- Compact disc player--  
Digital camera -- DVD player -- DVD/VCR combo -- Flash drive --  
Headphone -- Laptop computer-- Listening center -- Microphone --  
Multimedia projector -- Overhead projector -Television --  
Television cart -- TV/VCR combo -- VCR*

### **500 - Notes - Searchable in general search**

- \*TV / VCR / DVD / Combo -- remote control*
- \*Computer / Laptop - memory, harddrive, processor,  
network info, peripherals, mouse, keyboard, drives, wireless*
- \*Flash Drive - RAM*

### **690 - Subject - Searchable and hyperlinked**

- \*Overhead projector -- bulb*
- \*Audiocassette player/recorder -- battery*

**Item notes:** Not searchable but will display in Java circulation screen

- \*Circ note: list additional pieces signed out with equipment*
- \*Staff note: enter repair information*

### **Repair Record: (options)**

- \*Enter in 500 if you want it as a searchable note*
- \*Enter in 690 if you want to hyperlink the information  
i.e. 690 Repair record: 2003*
- \*Enter in staff note on item info which will appear on  
the Java circulation screen but is not searchable.*

## Add an ereader with multiple titles using the ereader Template

### General points to keep in mind:

- You will be creating one record for each ereader with multiple titles. This is different from cataloging other items. Normally you would put multiple copies of the same title on the same record. However, if you have 5 identical ereaders, you will need 5 records. This will streamline your recordkeeping.
- This template has been designed to be used when cataloging ereaders with multiple titles. Using the appropriate template reduces the amount of information to be added.
- The templates are designed to be as detailed or brief as desired. All of the fields on the record need not be used. Any unwanted fields should be deleted with the Delete Field helper.

**NOTE:** *If you prefer to catalog just the ereader without listing the contents in the record, delete the content related fields – 505, 650, 700.*

- All fields on this record are searchable in Sirsi by doing a General Search.
- The Fixed Fields (leader) are already formatted. You only need to adjust the date.
- The first three fields on the record, 024, 037, and 092 are numbers specific to each item in addition to the barcode number; this will make it easy to locate them.
- Use the 500 tag for any additional notes, description, etc. This is a good place to list included pieces – power adapter, cables, etc. This field is searchable, but not hyperlinked.
- Any information you put in the 690 – local subject – is hyperlinked. Use this field to add any information you want to be searchable and hyperlinked – ex. permanent location, repaired 2003, vendor name, etc.
- When deleting text, be careful that you leave any punctuation in place.
- If you have not done so already, set your properties to display descriptive labels. Right click on Modify Title > Click on Properties > Check Display descriptive labels.

Editor display options

MARC View

Descriptive view

Add empty entries


Display fixed fields

Display descriptive labels (for entries)

Entries template: BRIEF

### Creating an ereader Record

1. Use SmartPORT TEMPLATE database to **locate** an ereader template record for your item. Perform a Title Search for the type of equipment. Ex. ereader
2. **Import** the record (See Handbook, Cataloging, Basic Cataloging/SmartPort guides for specific directions).

3.  **Modify Title** **Click** on Modify Title Wizard. The record should be “current title”.

4. If you do not want your record to display in CAT, **check** Shadow Title.

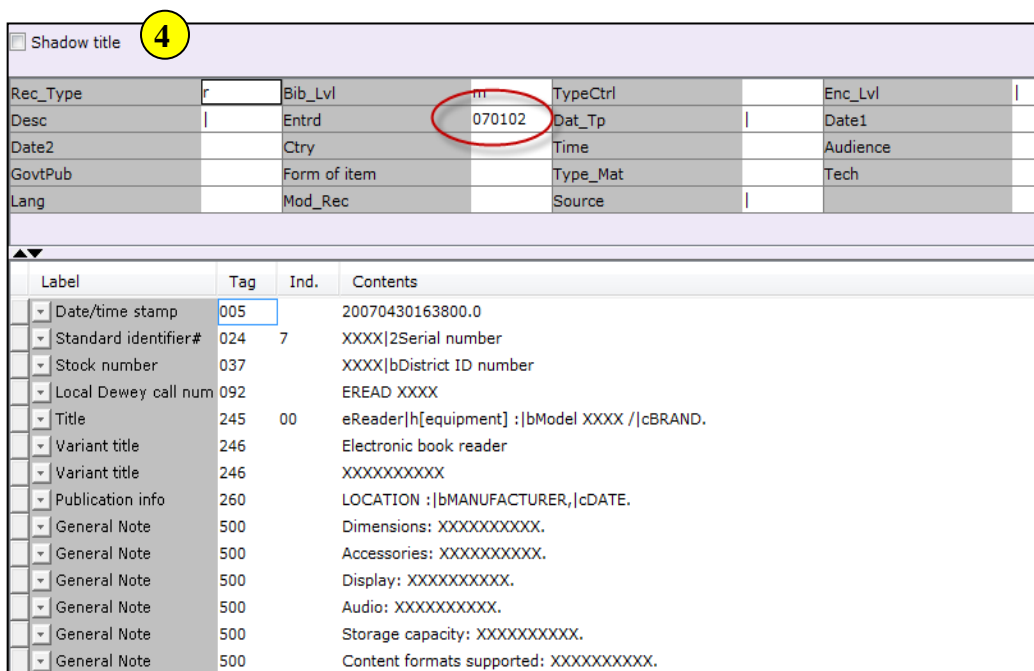
5. **Make** the following changes:

**Fixed fields:**

- Entrd--** change to current date in format YYMMDD

**Bibliographic Info:**

- 024** Replace XXXX with serial no.
- 037** Replace XXXX with local number (school inventory, insurance number, etc.)
- 092** Leave the letters in the field. Use them as a prefix for the call number. Replace the XXXX with the unique part of your call number, ex NOOK or KINDLE.
- 245** Replace XXXX with the model number. Delete “BRAND” and replace with the brand name.
- 260** Replace the words with the appropriate information. Leave punctuation in place. Ex. New York :|b Barnes & Noble,|cc2010.
- 500** Enter any notes or delete the field.
- 505** Contents Note (Optional)  
This field is used to list titles loaded on your ereader. Information in a 505 tag will come up in a title search. **Select** the one format that best fits your item and **delete** the other 505



<input checked="" type="checkbox"/> Shadow title <b>4</b>					
Rec_Type	r	Bib_Lvl	m	TypeCtrl	Enc_Lvl
Desc		Entrd	070102	Dat_Tp	Date1
Date2		Ctry		Time	Audience
GovtPub		Form of item		Type_Mat	Tech
Lang		Mod_Rec		Source	

Label	Tag	Ind.	Contents
Date/time stamp	005		20070430163800.0
Standard identifier#	024	7	XXXX 2Serial number
Stock number	037		XXXX bDistrict ID number
Local Dewey call num	092		EREAD XXXX
Title	245	00	eReader h[equipment] : bModel XXXX / cBRAND.
Variant title	246		Electronic book reader
Variant title	246		XXXXXXXXXX
Publication info	260		LOCATION : bMANUFACTURER, cDATE.
General Note	500		Dimensions: XXXXXXXXXXXX.
General Note	500		Accessories: XXXXXXXXXXXX.
General Note	500		Display: XXXXXXXXXXXX.
General Note	500		Audio: XXXXXXXXXXXX.
General Note	500		Storage capacity: XXXXXXXXXXXX.
General Note	500		Content formats supported: XXXXXXXXXXXX.

tags. In all formats, titles are separated by space, dash, dash, space.

**NOTE:** *If you want to include authors as in the 2<sup>nd</sup> example below, they will not be searchable by author. You must enter the author's name in a 700 tag to search by author.*

Examples:

- 505 The trappings of power -- Upon reflection -- Pot luck -- A time to dance.
- 505 On my way to school / by Jim Smith -- It happened one time at lunch / by Angela Dime -- The day it snowed / by Laura Wilson.
- 505 v. 1. 1900-1945 -- v. 2. 1945-1996.

If you don't want titles listed on the ereader record, **DELETE** all the 505 tags.

- 6XX** If you want to include subject headings for each title, please refer to document 12.6d – Adding Subject Headings. Keep in mind, the subjects will be connected to the ereader and not to a specific title.
- 690** Replace XXXX with appropriate information or delete the field.
- 690** Repair: Fyxxxx – leave this field as is, so it can be used in the future to enter repair year if desired. Repair specifics should be entered in the 500 tag or an item staff note.
- 710** Replace MANUFACTURER with the manufacturer of the ereader. Do not move this tag. It must display above the 700.
- 700** Added Author

Use this for specifically named authors of titles in a 505 tag. **Delete** AUTHOR and following text and **replace** with author's name - last name first. You should add a 700 tag for each author you include. Put your cursor in the 700 tag and click the Add a Field helper. You can add as many authors and 700 tags as you need.

Examples:

- 700 Steinbeck, John.
- 700 Hemingway, Ernest.

If you don't want authors to display, delete the field.

- 989 Do not make any changes! DO NOT DELETE!**

6. **Click** Save and Close.


**Sample of a completed ereader record:**

Shadow title

Label	Tag	Ind.	Contents
Standard identifier#	024	7	101143BAN8060059 2Serial number
Stock number	037		020012 bDistrict ID number
Local Dewey call num	092		EREAD Nook 1
Title	245	00	eReader h[equipment] : bModel BNRV100 / cNook.
Variant title	246		Barnes & Noble Nook Wifi
Publication info	260		New York : bBarnes & Noble, c2010.
General Note	500		Dimensions: 7.7 x 4.9 x 0.5 in.
General Note	500		Accessories: power adapter + USB cable + battery (installed) + quick start guide ([16] p.).
General Note	500		Display: 6" diagonal E-Ink@ Vizplex electronic paper display, 1024 x 600 pixel resolution at 169 ppi, 3.5 inch color touchscreen LCD, 6 fond sizes.
General Note	500		Audio: universal 3.5 mm stereo headphone jack, built-in mono speakers, plays mp3 files of books or music.
General Note	500		Storage capacity: Holds thousands of books, songs, photos, & more ; 8GB6 (up to 5,000 books) built-in memory; Expandable storage up to 32GB with microSD memory card7.
General Note	500		Content formats supported: EPUB (including Non or Adobe DRM), PDB, PDF, graphics: JPG, GIF, PNG, BMP, audio: MP3; not supported: DOC, LIT, TXT, AMZ (Amazon), LRZ/LRX (Sony).
General Note	500		Connectivity: Wireless connectivity via Wi-Fi@ (802.11b/g/n); FREE Wi-Fi@ in all Barnes & Noble stores.
General Note	500		Battery life with wireless off: Read for up to 8 hours.
Contents Note	505		"Just so" stores / by Rudyard Kipling. How the elephant got his trunk ; How the camel got his hump ; How the leopard got his spots; The beginning of the armadillos -- Stories / by Hans Christian Anderson. The leap-frog ; The wild swans -- Dog stories. A dog's tale / by Mark Twain ; Brown wolf / by Jack London -- Stories from "Queer Little Folks" / by Harriet Beecher Stowe. The squirrels that live in a house.
Subject term	650		Electronic books xEquipment and supplies.



### Adding Item information for ereader

1.  **Call Number/Item Maint** **Click** the Call number and Item Maintenance wizard. The record will be the current title. (See *Handbook, Cataloging, Call Number/Item Maintenance guide for detailed directions.*)

2. **Enter** the call number from the 092 tag. Using the recommended prefix will make it easier to perform a call number browse or sort a shelflist by call number and have all similar items display together.

Label	Tag	Ind.	Contents
Date/time stamp	005		20070430163800.0
Standard identifier#	024	7	101143BAN8060059 2Serial number
Stock number	037		020012 bDistrict ID number
Local Dewey call num	092		EREAD Nook 1
Title	245	00	eReader h[equipment] : bModel BNRV100 / cNook.
Variant title	246		Barnes & Noble Nook Wifi

3. **Click** Save.
4. **Click** Add Item.
5. **Enter** the item information.

6. **Click** Save and Close.

#### HINTS:

- The Circ note will display at checkout and checkin in Sirsi. Enter things you want to check at those times such as "includes power adapter and USB cable", "cable at desk", etc.
- If the item has peripherals, be sure to adjust the number of pieces.
- Use Staff Note to keep repair history.

### Adding multiple identical ereaders


**Scenario:** You have 10 identical ereaders to catalog.

**HINT:** When cataloging multiple pieces of equipment, **set** your properties first.

**Right click** on Duplicate Title >  
**click** on Properties.

- a. Make Type: EREADER.
- b. Make Item Category 1: DIGITALDEV.
- c. Set price and/or funding source if appropriate.

Item required default values			
Type:	EREADER	<input checked="" type="checkbox"/> Permanent	
Home location:	AVAILABLE	<input checked="" type="checkbox"/> Circulate	
		<input type="checkbox"/> Shadow item	
Item optional default values			
Price:	\$130.00	Item category 1:	DIGITALDEV
Media desk:		Item category 2:	GRANT

1. **Complete** the cataloging process for the first item.
2.  **Click** on the Duplicate Title Wizard
3. **Locate** for the record you just completed. **Click** Duplicate.
  - Change** the serial number in the 024 tag.
  - Change** the local ID number in the 037 tag.
  - Change** the call number in the 092 tag.
  - Make** any other changes needed in the bib record. **Click** Save when done.
4. **Click** on the Call Number / Item tab.
5. **Complete** the item information screen.
6. **Click** Save.
7. **Click** on the XX call number and modify it.
8. **Click** Return to Search.
9. **Repeat** steps 3 – 8 until all ereaders have been cataloged. You should have 10 bib records with the same multiple items on each record.

**Fixed Fields**

Rec_Type	r	Bib_Lvl	m	TypeCtrl		Enc_Lv	
Desc		Entrd		Dat_Tp		Date1	
Date2		Ctry		Illus		Audience	


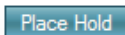

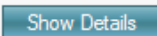
Label	Tag	Ind.	Content
Standard Identifier #	024	7 _	XXXX 2Serial number
Stock No.	037		XXXX bDistrict ID number
Local Dewey call num	092		EREAD XXXX
Title	245	0 0	eReader h[equipment] : bModel XXXX / cBRAND.
Variant Title	246		Electronic book reader
Variant Title	246		XXXXXXXXXX
Publication info	260		LOCATION : bMANUFACTURER, cDATE.
General Note	500		Dimensions: XXXXXXXXXXXX.
General Note	500		Accessories: XXXXXXXXXXXX.
General Note	500		Display: XXXXXXXXXXXX.
General Note	500		Audio: XXXXXXXXXXXX.
General Note	500		Storage capacity: XXXXXXXXXXXX.
General Note	500		Content formats supported: XXXXXXXXXXXX.
General Note	500		Connectivity: XXXXXXXXXXXX.
General Note	500		Battery life with wireless off: XXXXXXXXXXXX.
General Note	500		XXXXXXXXXX.
Content Note	505		TITLE -- TITLE -- TITLE.
Content Note	505		TITLE / by AUTHOR -- TITLE / by AUTHOR -- TITLE / by AUTHOR.
Content Note	505		v. 1. TITLE OR PART -- v. 2. TITLE OR PART -- v. 3. TITLE OR PART.
Subject Term	650		Electronic books xEquipment and supplies.
Subject Term	650		Reading xAids and devices.
Local Subject	690	0 0	Audio-visual equipment.
Local Subject	690		Fiscal year: FYXXXX.
Local Subject	690		Purchase order: XXXX.
Local Subject	690		Repair: FYXXXX.
Local Subject	690		XXXXXXXXXX.
Added Author	710	2	MANUFACTURER.
Added Author	700	1	AUTHOR (ADD TAG FOR EACH AUTHOR IN CONTENT NOTES).
<b>INFOhio template</b>	<b>989</b>	<b>_ _</b>	<b>Equipment Record</b>

Blue – Hardware


Black – Content

Green – Both

Red – Keeps from going to CRC

<b>#1</b>	<b>NOOK 1</b>	<b>2010</b>
	<b>eReader [equipment] : Model BNRV100</b> Barnes & Noble. New York : Barnes & Noble, c2010.	
		
	<b>Copies at</b>	<b>Available</b>
	LEECA High School	1
		<b>Total</b> 1
		

**eReader [equipment] : Model BNRV100**  **CHANGE DISPLAY**  
Barnes & Noble.

**Leader:** am||  
**key:** 105-2135181  
**Date/time stamp:** 20080224221018.0  
**Fixed field data:** 070205| |  
**Standard identifier#:** 101143BAN8060059 Serial number  
**Stock number:** 020012 District ID number  
**Local Dewey call num:** EREAD Nook 1  
**Title:** eReader [equipment] : Model BNRV100 / Nook.  
**Variant title:** Barnes & Noble Nook wifi  
**Publication info:** New York : Barnes & Noble, c2010.  
**General Note:** Dimensions: 7.7 x 4.9 x 0.5 in.  
**General Note:** Accessories: power adapter + USB cable + battery (installed) + quick start guide ([16] p.).  
**General Note:** Display: 6" diagonal E-Ink® Vizplex electronic paper display, 1024 x 600 pixel resolution at 169 ppi, 3.5 inch color touchscreen LCD, 6 font sizes.  
**General Note:** Audio: universal 3.5 mm stereo headphone jack, built-in mono speakers, plays mp3 files of books or music.  
**General Note:** Storage capacity: Hold thousands of books, songs, photos, & more ; 8GB6 (up to 5,000 books) built-in memory; Expandable storage up to 32GB with microSD memory card7.  
**General Note:** Content formats supported: EPUB (including Non or Adobe DRM), PDB, PDF, graphics: JPG, GIF, PNG, BMP, audio: MP3 ; not supported: DOC, LIT, TXT, AMZ (Amazon), LRZ/LRX (Sony).  
**General Note:** Connectivity: Wireless connectivity via Wi-Fi® (802.11b/g/n); FREE Wi-Fi® in all Barnes & Noble stores.  
**General Note:** Battery life with wireless off: Read for up to 8 hours.  
**Contents Note:** "Just so" stories / by Rudyard Kipling. How the elephant got his trunk ; How the camel got his hump ; How the leopard got his spots; The beginning of the armadillos -- Stories / by Hans Christian Andersen. The leap-frog ; The wild swans -- Dog stories. A dog's tale / by Mark Twain ; Brown wolf / by Jack London -- Stories from "Queer Little Folks" / by Harriet Beecher Stowe. The squirrels that live in a house.  
**Subject term:** Electronic books--Equipment and supplies.  
**Subject term:** Reading--Aids and devices.  
**Subject term:** Children's stories.  
**Subject term:** Fairy tales.  
**Local subject:** Audio-visual equipment.

Blue – Hardware

Black – Content

Green – Both

Red – Keeps from going to CRC

**Fixed Fields**

Rec_Type	a	Bib_Lvl	m	TypeCtrl		Enc_Lv	
Desc		Entrd		Dat_Tp		Date1	
Date2		Ctry		Illus		Audience	

Label	Tag	Ind.	Content
Standard Identifier #	024	7 _	101143BAN8060059  2Serial number
Stock No.	037		020012 bDistrict ID number
Local Dewey call num	092		EREAD Nook 1
Title	245	0 0	eReader h[equipment] : bModel BNRV100 / cNook.
Variant Title	246		Barnes & Noble Nook wifi
Publication info	260		New York : bBarnes & Noble, cc2010.
General Note	500		Dimensions: 7.7 x 4.9 x 0.5 in.
General Note	500		Accessories: power adapter + USB cable + battery (installed) + quick start guide ([16] p.).
General Note	500		Display: 6" diagonal E-Ink® Vizplex electronic paper display, 1024 x 600 pixel resolution at 169 ppi, 3.5 inch color touchscreen LCD, 6 font sizes.
General Note	500		Audio: universal 3.5 mm stereo headphone jack, built-in mono speakers, plays mp3 files of books or music.
General Note	500		Storage capacity: Hold thousands of books, songs, photos, & more ; 8GB6 (up to 5,000 books) built-in memory; Expandable storage up to 32GB with microSD memory card7.
General Note	500		Content formats supported: EPUB (including Non or Adobe DRM), PDB, PDF, graphics: JPG, GIF, PNG, BMP, audio: MP3 ; not supported: DOC, LIT, TXT, AMZ (Amazon), LRZ/LRX (Sony).
General Note	500		Connectivity: Wireless connectivity via Wi-Fi® (802.11b/g/n); FREE Wi-Fi® in all Barnes & Noble stores.
General Note	500		Battery life with wireless off: Read for up to 8 hours.
Content Note	505		"Just so" stories / by Rudyard Kipling. How the elephant got his trunk ; How the camel got his hump ; How the leopard got his spots; The beginning of the armadillos -- Stories / by Hans Christian Andersen. The leap-frog ; The wild swans -- Dog stories. A dog's tale / by Mark Twain ; Brown wolf / by Jack London -- Stories from "Queer Little Folks" / by Harriet Beecher Stowe. The squirrels that live in a house.
Subject Term	650		Electronic books xEquipment and supplies.
Subject Term	650		Reading xAids and devices.
Subject Term	650		Children's stories.
Subject Term	650		Fairy tales.
Local Subject	690	0 0	Audio-visual equipment.
Local Subject	690		Fiscal year: FY2011.
Local Subject	690		Purchase order: 98125.
Local Subject	690		Repair: FYnone.
Added Author	710	2	Barnes & Noble.
Added Author	700	1	Kipling, Rudyard.
Added Author	700	1	Andersen, Hans Christian.
Added Author	700	1	Twain, Mark.
Added Author	700	1	London, Jack.
Added Author	700	1	Stowe, Harriet Beecher.
INFOhio template	989	_ _	Equipment Record

Blue – Hardware

Black – Content

Green – Both

Red – Keeps from going to CRC

**Blue – Hardware**

**Black – Content**

**Green – Both**

**Red – Keeps from going to CRC**

**Fixed Fields**

Rec_Type	a	Bib_Lvl	m	TypeCtrl		Enc_Lv	
Desc	a	Entrd		Dat_Tp		Date1	
Date2		Ctry		Illus		Audience	

Label	Tag	Ind.	Content
<b>LCCN (NR)</b>	010	_ _	Library of Congress Cataloging Number
<b>ISBN</b>	020	_ _	ISBN (10/13 characters, no dashes)
<b>Cataloging source (NR)</b>	040	_ _	School's Library of Congress Code
<b>Personal Author (NR) -- print</b>	100	<u>1</u> _	Personal author last name, first name,  dDates associated with name.
<b>Title (NR)</b>	245	<u>1</u> <u>0</u>	Item's title ; bRemainder of title / cStatement of responsibility.
Variant title	246	_ _	Varying form of title
Edition (NR)	250	_ _	Edition statement.
<b>Publication info (NR)</b>	260	_ _	Location : bPublisher,  cDate of publication.
<b>Physical description -- print</b>	300	_ _	Number of pagesp. : bill. : cXX cm. + eAccompanying material.
<b>Physical description -- nonprint</b>	300	_ _	Number of videodisc/cassettes (XX min.) : bsd., col. : cXX in. + eAccompanying material.
Series Title	440	_ <u>0</u>	Name of series ; vNumeric designation volume or sequential
General Note	500	_ _	General notes.
Bibliography note -- print	504	_ _	Includes bibliographic references (p. XX-XX) and index.
Contents Note	505	_ _	Formatted content notes (titles of separate works, parts of an item, table of contents, may also contain statements of responsibility and volume numbers or other sequential designations.
Credits -- nonprint	508	_ _	Production credit, i.e. producer, director, cinematographer, etc.
Performer -- nonprint	511	_ _	Names of performers separated by commas and a space.
Summary	520	_ _	Abstract/Summary notes - Unformatted information that describes the scope and general contents of the materials.
Audience	521	_ _	Audience for which item is intended, i.e. elementary, 7-9, adult, etc.
Technical details -- nonprint	538	_ _	Format of nonprint item – VHS or DVD
<b>Personal subject</b>	600	_ _	Person as subject heading last name, first name dDates associated with a name xGeneral subdivision yChronological subdivision  zGeographic subdivision vGenre
<b>Subject term</b>	650	_ _	Topical subject heading xGeneral subdivision yChronological subdivision  zGeographic subdivision vGenre
<b>Geographic term</b>	651	_ _	Geographic subject heading xGeneral subdivision yChronological subdivision  zGeographic subdivision vGenre
Added author	700	_ _	Personal name last name, first name  dDates associated with a name cTitles associated with name
Added author	710	_ _	Corporate author bDivision or subordinate unit
Conference author	711	_ _	Meeting name or jurisdiction name dDate of meeting cLocation of meeting.
Uniform title	730	<u>0</u> _	Added Title Tracing - Uniform title nNumber of part/section of a work pName of part/section of a work
Internet site	856	_ _	Internet site url xNonpublic note zPublic note 3Materials specified
INFOhio template	989	_ _	<b>Original Record</b>

Indicators – 0 indicates number of non-filing characters for leading article. (The = 4 A = 2 An = 3 Les = 4)  
**Blue** indicates required information if available. **Red** indicates required fields and punctuation.  
 (NR) – indicates that tag is NOT repeatable

Indicators – **0** indicates number of non-filing characters for leading article. (The = 4 A = 2 An = 3 Les = 4)  
**Blue** indicates required information if available. **Red** indicates required fields and punctuation.  
**(NR)** – indicates that tag is NOT repeatable

---

Last Updated Summer 2015

Cataloging – Templates pg 2

**Page layout created and text abridged by INFOhio from SirsiDynix documentation.**  
**Copyright © 2006, SirsiDynix. All Rights Reserved**



**Fixed Fields**

Rec_Type	a	Bib_Lvl	m	TypeCtrl		Enc_Lv	
Desc	a	Entrd		Dat_Tp		Date1	
Date2		Ctry		Illus		Audience	

Label	Tag	Ind.	Content
LCCN (NR)	010	--	_____
ISBN	020	--	_____
Cataloging source (NR)	040	--	_____
Personal Author (NR)	100	<u>1</u> --	_____
Title (NR)	245	<u>1</u> <u>0</u>	_____
Variant title	246	--	_____
Edition (NR)	250	--	_____
Publication info (NR)	260	--	_____
Physical description	300	--	_____
Series Title	440	-- <u>0</u>	_____
General Note	500	--	_____
Bibliography note	504	--	_____
Contents Note	505	--	_____
Credits -- nonprint	508	--	_____
Performer -- nonprint	511	--	_____
Summary	520	--	_____
Audience	521	--	_____
Technical details -- nonprint	538	--	_____
Personal subject	600	--	_____
Subject term	650	--	_____
Geographic term	651	--	_____
Added author	700	--	_____
Added author	710	--	_____
Conference author	711	--	_____
Uniform title	730	<u>0</u> --	_____
Internet site	856	--	_____
INFOhio template	989	--	<b>Original Record</b>

Indicators – 0 indicates number of non-filing characters for leading article. (The = 4 A = 2 An = 3 Les = 4)  
**Blue** indicates required information if available. **Red** indicates required fields and punctuation.  
 (NR) – indicates that tag is NOT repeatable.

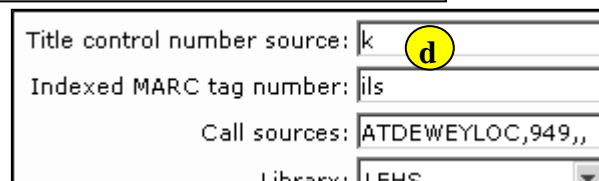
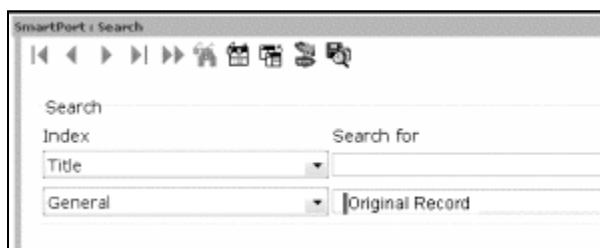
## Original Cataloging - Book Template

This template is to be used for commercially produced materials. Use it if you are unable to locate a record in any of the SmartPort databases.

**NOTE:** *If you find a record for the original published edition, then reprints, paperback, or rebound editions by Scholastic, Turtleback, Bound to Stay Bound, Aladdin, Puffin and similar companies may be added to that record. You need to examine the verso (back of title page) carefully for that information. A new record is not required if the content and format have not changed. New bindings and/or reprints do not require new records. If the new edition includes changed or added content then a new record is required. If you are unsure, create a new record.*

1. **Export** the template using SmartPort.

- a. **Select** the TEMPL (template) database.
- b. **Search** for the template using General for the search index and ORIGINAL RECORD for the search term.
- c. **Select** the appropriate template for your item.
- d. **Capture and save** as a NEW record, remove oisl from the Title Control Number Source and **replace it with "k"**. The record will load as new with a unique Title Control number.

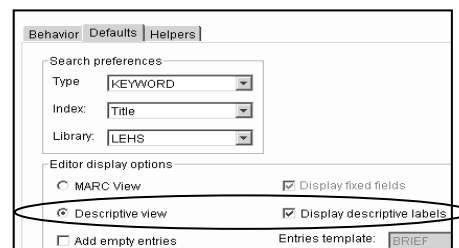


**NOTE:** *It is recommended that templates be downloaded only as needed, as they may be updated from time to time by INFOhio and they could become corrupted if left to reside in a local catalog.*

2. **Select** the Modify Title Wizard. If you haven't done so already, change the properties (right click on the Modify Title wizard).

- **Bullet** Descriptive View.
- **Check** Display descriptive labels.

3. **Display** your template. The template you exported will be the Current Title.



When completing the template, keep in mind:

- Fields in **Bold and starred (\*245)** should be completed if the information is available.
- Records can be as detailed or as simple as you desire. If you do not want a tag or field, use the delete a field helper to remove it. (Put your cursor in the unwanted box and click the delete helper.) Be sure to delete **ALL** tags and fields you do not want. A completed record should not have any XXXXs in it.



- If you do not want some of the subfields in a tag, you must remove the punctuation preceding it, the pipe, subfield letter, and its text.

Physical descrip 300 XXXp. :|bill. ;|cXX cm. +|eACCOMPANYING MATERIAL

Physical descrip 300 32p. :|bill.

- You may find it helpful to use any or all of the tip sheets in this section of the Sirsi manual. They are color coded making it easier to spot punctuation and mandatory fields.
- If these directions are followed carefully, title, author, subject and series fields will hyperlink correctly.

**Fixed Fields**

BOOK TEMPLATE : REMAINDER OF TITLE / LAST NAME, FIRST NAME, DATES

Control Bibliographic | Call Number/Item | Bound-with |

Shadow title

Rec_Type	a	Bib_Lvl	m	TypeCtrl		Enc_Lvl	
Desc	a	Entrd	U30821	Pat_Tp	s	Date1	
Date2		Ctry		Illus		Audience	
Repr		Cont		GovtPub		ConfPub	0
Festschr	0	Indx	0	Fiction		Biog	
Lang	eng	Mod_Rec		Source	d		

**\*Date entered on file (Entrd):** This date must be replaced with the current date. Enter as YYMMDD

- \*Date 1:** Enter publication date.
- If there is not a publication date but a copyright date is available, you may use the copyright date.
  - If there is no date at all, you must estimate a date or replace the unknown digits with the letter 'u.' EXAMPLE: 19uu.

**Edit** the remainder of the tags as appropriate for your item.

- 001 – Do nothing!
- 005 – Do nothing!
- 007 – Do nothing!

**010 – LCCN – Library of Congress**

Control number  
**Delete** "LCCN" and **replace** with the number if appropriate or else delete the tag.

**\*020 - ISBN**

**Delete** "ISBN" and **replace** with the 10 or 13 digit number. Do not use dashes or spaces. If your item does not have an ISBN, delete the tag.

LCCN	010	LCCN
ISBN	020	ISBN
Cataloging source	040	SCHOOL LC CODE
Personal Author	100 1	LAST NAME, FIRST NAME,  dDATES.
Title	245 10	BOOK TEMPLATE :  bREMAINDER OF TITLE / cSTATEMENT OF RESPONSIBILITY.
Variant title	246	VARYING FORM OF THE TITLE
Edition	250	EDITION STATEMENT.
Publication info	260	LOCATION :  bPUBLISHER,  cPUBLICATION DATE.
Physical descrip	300	XXX p. : bill. ; cXX cm. + eACCOMPANYING MATERIAL.
General Note	500	XXXXXXXXXX.
Bibliography note	504	Includes bibliographic references (p. XX-XX) and index.
Contents Note	505	TITLE -- TITLE -- TITLE.
Contents Note	505	TITLE / by AUTHOR -- TITLE / by AUTHOR -- TITLE / by AUTHOR.
Contents Note	505	v. 1. TITLE OR PART -- v. 2. TITLE OR PART -- v. 3. TITLE OR PART.
Summary	520	XXXXXXXXXXXXX.
Personal subject	600	PERSON'S LAST NAME, FIRST NAME,  dDATES.
Subject term	650	TOPICAL SUBJECT.
Geographic term	651	GEOGRAPHIC SUBJECT.

**\*040 – CATALOGING SOURCE**

**Delete** "SCHOOL LC CODE" and **replace** with your school's Library of Congress (LC/NUC) code. Remember, it is case sensitive. If you don't know your school's code, please look it up here: <http://www.infohio.org/UC/LOCcodesRev.html>

Example: 040 OLmlUC

**\*100 – PERSONAL AUTHOR**

Use this tag if your item was written by a single person. If the work is a compilation of several authors, (ie. a video or encyclopedia), delete this tag and enter their names in the 700 tag.

**Delete** "LAST NAME, FIRST NAME" and **replace** with the author's name in that format. If you know the author's birth / death dates **delete** "DATES" and **enter** them. If you do not know the author's birth / death dates, **delete** "|dDATES"

Example: 100 1 Mitchell, Margaret, |d1900-1949.

**\*245 – TITLE**

245	10	BOOK TEMPLATE : bREMAINDER OF TITLE / cSTATEMENT OF RESPONSIBILITY.
-----	----	---

The first indicator tells if there is a main author in the 100 tag. If so, it should be a 1 (one). If the work is the compilation of many authors and there is no 100 tag, the first indicator should be changed to a 0 (zero).

Examples:

245 10 Charlotte's web /|cby E.B. White ; pictures by Garth Williams.  
245 00 Great books of the Western World.

The second indicator is what determines how the title will sort alphabetically. Spaces count as a character. **Determine** if it should remain 0 or be changed.

Examples:

If no initial article enter a zero ( 0 )	245	10	Gone with the Wind.
A = 2	245	12	A Raisin in the sun.
The = 4	245	14	The plays of Oscar Wilde.

**Delete** " \_\_\_\_\_ TEMPLATE" and **replace** with the item's title as it appears on the title page.

Example: 245 10 General, organic, and biological chemistry.

**Delete** "REMAINDER OF TITLE" and **replace** with remainder of the title or delete " :|REMAINDER OF TITLE"

Example: 245 10 General, organic, and biological chemistry :|ba brief introduction.

**Delete** "STATEMENT OF RESPONSIBILITY" and **replace** with the author, illustrator, translator, editor, etc. Enter name as it appears on the title page. Or delete " /|c STATEMENT OF RESPONSIBILITY."

Example: 245 10 General, organic, and biological chemistry :|ba brief introduction /|cM. Lynn James, James O. Schreck.

246 – Variant title

This is most commonly used for items that have numbers or abbreviations in the title and is needed so either format will yield results in a search. If the title of your item has variations, **delete** “VARYING FORM OF THE TITLE” and **replace** with the alternate title. If there is no variant title, delete the tag.

Example:

245 One Hundred and One Dalmatians.  
246 101 Dalmatians

250 – Edition Statement

**Delete** “EDITION STATEMENT” and **replace** with the edition (usually found on the title page). If there is no edition statement, delete the tag.

Example: 250 1st ed.

**\*260 – PUBLICATION INFORMATION**

**Delete** “LOCATION” and **replace** with the place of publication

**Delete** “PUBLISHER” and **replace** with the name of the publisher or distributor

**Delete** “PUBLICATION DATE” and **replace** with publication or distribution date.

**NOTE:** This MUST match the date entered in the leader in the Date1 field.

Example: 260 London :|bMacmillan,|c1967.

If there is no date of publication but a copyright date is available, you may use the copyright date preceded by the letter ‘c’ to identify it as a copyright date.

Example: 260 London :|bMacmillan,|cc1965.

**\*300 – PHYSICAL DESCRIPTION**

Your template will have the basic fields for your item type. **Replace** any XXXXs with the appropriate information. If you do not want some of the subfields in this tag, you must remove the punctuation preceding it, the pipe, subfield letter, and it’s text.

Examples:

Book - 300 32 p. :|bill. ;|c23 cm. +|eteacher’s guide.

500 – General Note

This tag is for information you want on the record, but there isn’t a designated field for it. **Delete** the XXXXs and **replace** with your information. If you don’t want a general note, delete the tag.

Examples:

500 Title taken from cover.  
500 Includes index.  
500 Translated from German.

#### 504 – Bibliography Note

If your item contains a bibliography, **delete** the XXs and **replace** with the page numbers of the bibliography. If there is no bibliography, delete the tag.

Example:      504 Includes bibliographic references (p. 320-324) and index.

#### 505 – Contents Note

This field is used to list titles contained in your item (list of short story titles, titles on one video, etc.) Information in a 505 tag will come up in a title search. **Select** the one format that best fits your item and **delete** the other 505 tags. In all formats, titles are separated by space, dash, dash, space.

**NOTE:** *If you want to include authors as in the 2<sup>nd</sup> example below, they will not be searchable by author. You must enter the author's name in a 700 tag to search by author.*

Examples:

- 505 The trappings of power -- Upon reflection -- Pot luck -- A time to dance.
- 505 On my way to school / by Jim Smith -- It happened one time at lunch / by Angela Dime -- The day it snowed / by Laura Wilson.
- 505 v. 1. 1900-1945 -- v. 2. 1945-1996.

If your item doesn't contain more than one title, **delete** the all three 505 tags.

#### 520 – Summary

**Delete** the text on template and **replace** with a summary of the contents. If you don't want a summary, delete the tag.

Example:

- 520 When the Chamber of Secrets is opened again at the Hogwarts School for Witchcraft and Wizardry, second-year student Harry Potter finds himself in danger from a dark power that has once more been released on the school.

#### 521 – Audience

**Delete** the text on the template and **replace** with intended audience.

Examples:

- 521 Elementary.
- 521 grade 7-9.

#### **\*6XX Subject**

You should include at least one subject in your record to facilitate searching in the online catalog. You may include as many as you wish. Determine if your item is about a person, place, or something else and then select the appropriate tag(s) below to enter the subject(s). If you wish to add more subjects, put your cursor in the 6XX tag and click the Add a Field helper. Delete any unused 6XX tags.

**\*600 – Personal Subject**

If your item is about a person, **delete** the text, and **replace** with the name (last name first). If your item is not about a person, delete the 600 tag.

Example:       600    Lincoln, Abraham.  
                  600    Lincoln, Abraham,|d1809-1865.

**\*650 – Subject Term**

If your subject is anything other than a person or place, **delete** all the text in the 650 field and **replace** with a subject term. See Sirsi Online Manual 12.6d for help on selecting subject headings.

Examples:  
                  650    United States|xHistory|yCivil War, 1861-1865.  
                  650    Folklore|zUnited States.  
                  650    Quantum theory.

**\*651 – Geographic Term**

If your item is about a geographical location, **delete** all the text in the 651 field and **replace** with the location. If your subject is not a geographical location, delete the tag.

Examples:  
                  651    Paris (France)  
                  651    Ohio and Erie Canal (Ohio)--History.

**7XX – Added Author**

If your item has been written by multiple authors or contributors, **select** the appropriate 7XX tag. Entries in these tags are searchable by author. If your item is the work of a single person, **delete** all three 7XX tags.

700 – Use this for specifically named authors or contributors. You can also use this tag to add authors of titles in a 505 tag. **Delete** “PERSON’S LAST NAME, FIRST NAME” and **replace** with author - last name first. You should add a 700 tag for each author you include. Put your cursor in the 700 tag and click the Add a Field helper. You can add as many authors and 700 tags as you need.

Examples:  
                  700    Steinbeck, John.  
                  700    Hemingway, Ernest.

710 – Use this tag if your item was created by a corporation. **Delete** “CORPORATE NAME” and **replace** with the name of the corporation.

Example:  
                  710    Creative Adventures.  
                  710    Disney Enterprises, Inc.

711- Use this tag if your item was created by sponsors of a meeting. Delete “MEETING NAME” and replace with the name of the meeting.

Example:       711    SirsiDynix Super Conference 2008.

**730 – Uniform Title**

Use this tag if your item is commonly known by another title. **Delete** “UNIFORM TITLE” and **replace** with the alternate title. If there is no uniform title, delete the tag.

Example: 730 Bible.

---

**\*989 – INFOhio Template**

“Original Record” must be included in your record. Do not make any changes or delete it.



**NOTE:** *If you have any questions about this document or cataloging in general, please contact your INFOhio Provider.*



## Original Cataloging - DVD / VideoTemplate

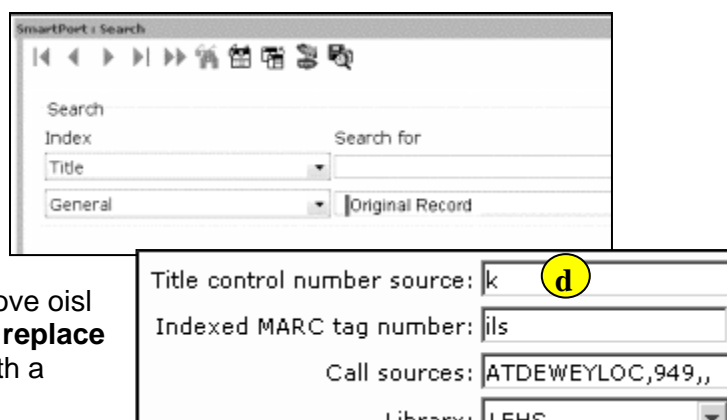
This template is to be used for commercially produced materials. Use it if you are unable to locate a record in any of the SmartPort databases.

**NOTE:** *If you are cataloging a DVD that you have created or copied (ie. copy of a PBS broadcast), use the Local School DVD Template.*

**NOTE:** *Be sure to select the correct template when in SmartPort. DVDs and Videos have different leaders. The rest of the information is the same for both formats except the 300 – physical description.*

1. **Export** the template using SmartPort.

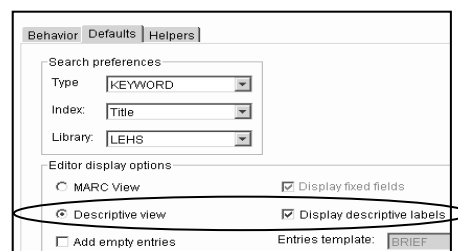
- a. **Select** the TEMPL (template) database.
- b. **Search** for the template using General for the search index and ORIGINAL RECORD for the search term.
- c. **Select** the appropriate template for your item.
- d. **Capture and save** as a NEW record, remove oisl from the Title Control Number Source and **replace it with “k”**. The record will load as new with a unique Title Control number.



**NOTE:** *It is recommended that templates be downloaded as needed, as they may be updated from time to time by INFOhio and they could become corrupted if left to reside in a local catalog.*

2. **Select** the Modify Title Wizard. If you haven't done so already, change the properties (right click on the Modify Title wizard).

- **Bullet** Descriptive View.
- **Check** Display descriptive labels.



3. **Display** your template. The template you exported will be the Current Title.

When completing the template, keep in mind:

- Fields in **Bold and starred (\*245)** should be completed if the information is available.
- Records can be as detailed or as simple as you desire. If you do not want a tag or field, use the delete a field helper to remove it. (Put your cursor in the unwanted box and click the delete helper.) Be sure to delete **ALL** tags and fields you do not want. A completed record should not have any XXXXs in it.



- If you do not want some of the subfields in a tag, you must remove the punctuation preceding it, the pipe, subfield letter, and its text.

Physical descrip 300 1 VIDEODISC (XX min.) :|bsd., col. ;|c4 1/2 in. +|eACCOMPANYING MATERIAL.

Physical descrip 300 1 VIDEODISC (XX min.) :|bsd., col. ;|c4 1/2 in.

- You may find it helpful to use any or all of the tip sheets in this section of the Sirsi manual. They are color coded making it easier to spot punctuation and mandatory fields.
- If these directions are followed carefully, title, author, subject and series fields will hyperlink correctly.

**Fixed Fields**

VD TEMPLATE [videorecording] : REMAINDER OF TITLE / PERSON'S LAST NAME, FIRST NAME, DATES.

Control Bibliographic | Call Number/Item | Bound-with |

Shadow title

c_Type	g	Bib_Lvl	m	TypeCtrl		Enc_Lvl	
sc	a	Entrd	040403	pat_Tp	s	Date1	
te2		Ctry		Time	---	Audience	
vtPub		Form of item		Type_Mat	v	Tech	
hg	eng	Mod_Rec		Source	d		

**\*Date entered on file (Entrd):** This date must be replaced with the current date.  
Enter as YYMMDD

- \*Date 1:** Enter publication date.
- If there is not a publication date but a copyright date is available, you may use the copyright date.
  - If there is no date at all, you must estimate a date or replace the unknown digits with the letter 'u.' EXAMPLE: 19uu.

**Variable Fields**

**Edit** the remainder of the tags as appropriate for your item.

001 – Do nothing!  
005 – Do nothing!  
007 – Do nothing!

**\*010 – LCCN** – Library of Congress  
Control number

**Delete** "LCCN" and **replace** with the number if appropriate or else delete the tag.

**\*020 - ISBN**

**Delete** "ISBN" and **replace** with the 10 or 13 digit number. Do not use dashes or spaces. If your item does not have an ISBN, delete the tag.

**\*040 – CATALOGING SOURCE**

**Delete** "SCHOOL LC CODE" and **replace** with your school's Library of Congress (LC/NUC) code. Remember, it is case sensitive. If you don't know your school's code, please look it up here:

LCCN	010	LCCN
ISBN	020	ISBN (NO HYPHENS)
Cataloging source	040	SCHOOL LC CODE
Title	245 00	DVD TEMPLATE h[videorecording] : bREMAINDER OF TITLE / cSTATEMENT OF RESPONSIBILITY.
Variant title	246	VARYING FORM OF TITLE
Edition	250	EDITION STATEMENT.
Publication info	260	LOCATION : bPUBLISHER, cPUBLICATION DATE.
Physical descrip	300	1 VIDEODISC (XX min.) : bsd., col. ; c4 1/2 in. + eACCOMPANYING MATERIAL.
General Note	500	XXXXXXXXXXXX.
Contents Note	505	TITLE -- TITLE -- TITLE.
Contents Note	505	TITLE / by AUTHOR -- TITLE / by AUTHOR -- TITLE / by AUTHOR.
Contents Note	505	v. 1. TITLE OR PART -- v. 2. TITLE OR PART -- v. 3. TITLE OR PART.
Credits	508	Producer, NAME ; writer, NAME ; director, NAME ; cinematographer, NAME.
Performer	511	PERFORMERS NAMES SEPARATED BY A COMMA.
Summary	520	XXXXXXXXXXXX.
Audience	521	TARGET AUDIENCE.
Technical details	538	DVD.
Personal subject	600	LAST NAME, FIRST NAME, dDATES.
Subject term	650	TOPIC SUBJECT.
Geographic term	651	GEOGRAPHIC SUBJECT.
Added author	700	PERSON'S LAST NAME, FIRST NAME, dDATES.
Added author	710	CORPORATE NAME.
Uniform title	730 0	UNIFORM TITLE.
INFOhio template	989	Original Record

<http://www.infohio.org/UC/LOCcodesRev.html>

Example: 040 OLmlUC

**\*245 – TITLE**

Title	245	00	DVD TEMPLATE h[videorecording] : bREMAINDER OF TITLE / cSTATEMENT OF RESPONSIBILITY.
-------	-----	----	--

The first indicator tells if there is a main author in the 100 tag. Since a DVD is usually the compilation of many authors, there is no 100 tag, and the first indicator is a 0 (zero).

The second indicator determines how the title will sort alphabetically. Spaces count as a character. **Determine** if it should remain 0 or be changed.

Examples:

If no initial article enter a zero ( 0 )    245 00 Gone with the wind.  
 A = 2                      An = 3                      245 02 A raisin in the sun.  
 The = 4                    Les = 4                      245 04 The Rock Cycle.

**Delete** "DVD TEMPLATE" and **replace** with the item's title.

Example:    245 04 The Presidents|h[videorecording].

**Delete** "REMAINDER OF TITLE" and **replace** with remainder of the title or delete " :|REMAINDER OF TITLE"

Example:    245 04 The Presidents|h[videorecording] :|bthe lives and legacies of the 43 leaders of the United States.

**Delete** "STATEMENT OF RESPONSIBILITY" and **replace** with the author, illustrator, translator, editor, etc. Or delete " /|cSTATEMENT OF RESPONSIBILITY."

Example: 245 04 The Presidents|h[videorecording] :|bthe lives and legacies of the 43  
leaders of the United States /|cHistory Channel ; a Greystone  
production ; executive producers, Craig Haffner, Donna E. Lusitana.

#### 246 – Variant title

This is most commonly used for items that have numbers or abbreviations in the title and is needed so either format will yield results in a search. If the title of your item has variations, **delete** "VARYING FORM OF THE TITLE" and **replace** with the alternate title. If there is no variant title, delete the tag.

Example:

245 One Hundred and One Dalmatians.  
246 101 Dalmatians

#### 250 – Edition Statement

**Delete** "EDITION STATEMENT" and **replace** with the edition. If there is no edition statement, delete the tag.

Example: 250 Widescreen format.

#### \*260 – PUBLICATION INFORMATION

**Delete** "LOCATION" and **replace** with the place of publication

**Delete** "PUBLISHER" and **replace** with the name of the publisher or distributor

**Delete** "PUBLICATION DATE" and **replace** with publication or distribution date.

**NOTE:** This MUST match the date entered in the leader in the Date1 field.

Example: 260 Silver Spring, MD :|bDiscovery Education,|c2006.

#### \*300 – PHYSICAL DESCRIPTION

**Replace** any XXXXs with the appropriate information. If you do not want some of the subfields in this tag, you must remove the punctuation preceding it, the pipe, subfield letter, and it's text.

Example: 300 2 videodiscs (178 min.) :|bsd., col. ;|c4 3/4 in.  
300 1 videocassette (23 min.) :|bsd., col. ;|c1/2 in.

#### 500 – General Note

This tag is for information you want on the record but there isn't a designated field for it. **Delete** the XXXXs and **replace** with your information. If you don't want a general note, delete the tag.

Examples:

500 Liveaction film.  
500 Title from disc.  
500 Based on The Magic School Bus book series written by Joanna Cole.

## 505 – Contents Note

This field is used to list titles contained on the DVD. They will display in a title search. **Select** the one format that best fits your item and **delete** the other 505 tags. In all formats, titles are separated by space, dash, dash, space.

**NOTE:** *If you want to include authors as in the 2<sup>nd</sup> example below, they will not be searchable by author. You must enter the author's name in a 700 tag to search by author.*

Examples:

- 505 The very hungry caterpillar -- Papa, please get the moon for me -- The very quiet cricket -- The mixed-up chameleon -- I see a song.
- 505 The little drummer boy /by Katherine Davis -- One zillion Valentines /by Frank Modell -- Sam and the lucky money /by Karen Chinn.
- 505 v. 1. Land divided, 1947-56 -- v. 2. The Six Day War, 1967 -- v. 3. Palestinian exiles, 1970-82.

If your item doesn't contain more than one title, **delete** all three 505 tags.

## 508 – Credits

This field is for the creators of the item – producers, writers, directors, cinematographers, etc. These are searchable by an author search. You can add as many entries as you wish in one tag. Each entry should be formatted:

Job comma first name last name space semicolon space (period after last entry.)

Examples:

- 508 Editor, Aaron Jones ; music, Paul Andrews ; writer, Sue Hosler.
- 508 Special dinosaur effects, Michael Lantieri ; music, John Williams ; editor, Michael Kahn.

## 511 – Performer(s)

This field is to give credit to actors, singers, narrators, etc. These are searchable by an author search. List major performers separated by commas and a space. Follow last entry with a period.

Examples:

- 511 Sam Neill, Laura Dern, Jeff Goldblum, Richard Attenborough.
- 511 Anne Baxter (Louise), Maria Perschy (Angela), Gustavo Rojo (Bill), Reginald Gilliam (Mr. Johnson).
- 511 Hosted by Hugh Downs.

## 520 – Summary

**Delete** the text on template and **replace** with a summary of the contents. If you don't want a summary, delete the tag.

Example:

- 520 When the Chamber of Secrets is opened again at the Hogwarts School for Witchcraft and Wizardry, second-year student Harry Potter finds himself in danger from a dark power that has once more been released on the school.

521 – Audience

**Delete** the text on the template and **replace** with intended audience.

Examples:

521 Elementary.  
521 gr. 7-9.

**\* 538 – Technical Details**

This is for the format of your item and is required for nonprint items. Do not delete!

Example: 538 DVD.

**\*6XX Subject**

You should include at least one subject in your record to facilitate searching in the online catalog. You may include as many as you wish. Determine if your item is about a person, place, or something else and then select the appropriate tag(s) below to enter the subject(s). If you wish to add more subjects, put your cursor in the 6XX tag and click the Add a Field helper. **Delete** any unused 6XX tags.

**\*600 – Personal Subject**

If your item is about a person, **delete** the text, and **replace** with the name (last name first). If your item is not about a person, delete the 600 tag.

Examples: 600 Lincoln, Abraham.  
600 Lincoln, Abraham,|d1809-1865.

**\*650 – Subject Term**

If your subject is anything other than a person or place, **delete** all the text in the 650 field and **replace** with a subject term. See Sirsi Online Manual 12.6d for help on selecting subject headings.

Examples:

650 United States|xHistory|yCivil War, 1861-1865.  
650 Folklore|zUnited States|vJuvenile films.  
650 Quantum theory.

**\*651 – Geographic Term**

If your item is about a geographical location, **delete** all the text in the 651 field and **replace** with the location. If your subject is not a geographical location, delete the tag.

Examples:

651 Paris (France)  
651 Columbus (Ohio)|vMaps.

**7XX – Added Author**

If your item has been written by multiple authors or contributors, **select** the appropriate 7XX tag. Entries in these tags are searchable by author.

700 – Use this for specifically named authors or contributors. You can also use this tag to add authors of titles in a 505 tag. **Delete** “PERSON’S LAST NAME, FIRST NAME” and **replace** with author - last name first. You should add a 700 tag for each author you include. Put your cursor in the 700 tag and click the Add a Field helper. You can add as many authors and 700 tags as you need.

Examples:

700 Steinbeck, John.  
700 Hemingway, Ernest.

710 – Use this tag if your item was created by a corporation. **Delete** “CORPORATE NAME” and **replace** with the name of the corporation.

Example:

710 Creative Adventures.  
710 Disney Enterprises, Inc.

---

**730 – Uniform Title**

Use this tag if your item is commonly known by another title. **Delete** “UNIFORM TITLE” and **replace** with the alternate title. If there is no uniform title, delete the tag.

Example: 730 Bible.

---

**\*989 – INFOhio Template**

“Original Record” must be included in your record. Do not make any changes or delete it.



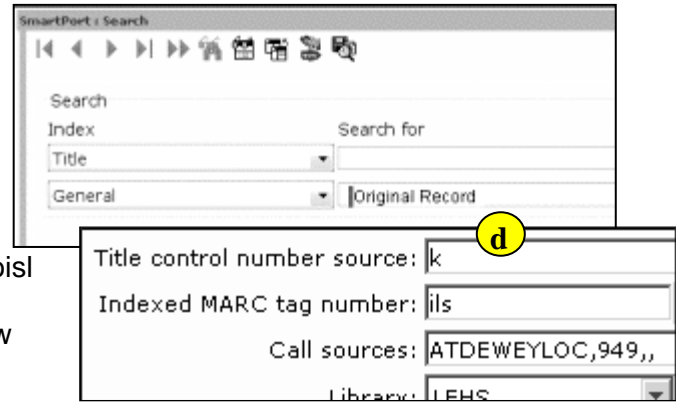
**NOTE:** *If you have any questions about this document or cataloging in general, please contact your INFOhio Provider.*

## Original Cataloging - eBook Template

This template is to be used for eBooks that do not have an existing record. *If you can find a record for the print version, follow the directions in Advanced Cataloging/Modify Title guide to modify that record.*

1. **Export** the template using SmartPort.

- a. **Select** the TEMPL (template) database.
- b. **Search** for the template using General for the search index and ORIGINAL RECORD for the search term.
- c. **Select** the EBOOK template for your item.
- d. **Capture and save** as a NEW record, remove oisl from the Title Control Number Source and **replace it with "k"**. The record will load as new with a unique Title Control number.

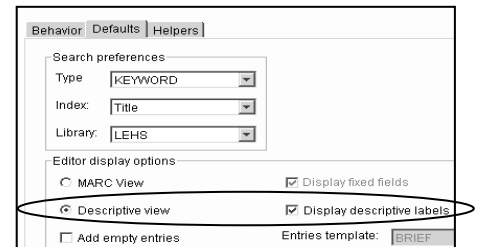


**NOTE:** *It is recommended that templates be downloaded as needed, as they may be updated from time to time by INFOhio and they could become corrupted if left to reside in a local catalog.*

2. **Select** the Modify Title Wizard. If you haven't done so already, change the properties (right click on the Modify Title wizard).

- **Bullet** Descriptive View.
- **Check** Display descriptive labels.

3. **Display** your template. The template you exported will be the Current Title.



When completing the template, keep in mind:

- Fields in **Bold and starred (\*245)** should be completed if the information is available.
- Records can be as detailed or as simple as you desire. If you do not want a tag or field, use the delete a field helper to remove it. (Put your cursor in the unwanted box and click the delete helper.) Be sure to delete **ALL** tags and fields you do not want. A completed record should not have any XXXXs in it.
- If you do not want some of the subfields in a tag, you must remove the punctuation preceding it, the pipe, subfield letter, and its text.



Physical descrip	300	XXX p. : bill. ; cXX cm. + eACCOMPANYING MATERIAL
------------------	-----	---

Physical descrip	300	32 p. : bill.
------------------	-----	---------------

- You may find it helpful to use any or all of the tip sheets in Section 11.9 of the Sirsi manual. They are color coded making it easier to spot punctuation and mandatory fields.



- If these directions are followed carefully, title, author, subject and series fields will hyperlink correctly.

**Fixed Fields**

BOOK TEMPLATE : REMAINDER OF TITLE / LAST NAME, FIRST NAME, DATES						
Control Bibliographic   Call Number/Item   Bound-with						
<input type="checkbox"/> Shadow title						
Rec_Type	a	Bib_Lvl	m	TypeCtrl		Enc_Lvl
Desc	a	Entrd	030821	Pat_Tp	s	Date1
Date2		Ctry		Illus		Audience
Repr		Cont		GovtPub		ConfPub 0
Festschr	0	Indx	0	Fiction		Biog
Lang	eng	Mod_Rec		Source	d	

**\*Date entered on file (Entrd):** This date must be replaced with the current date. Enter as YYMMDD

**\*Date 1:** Enter publication date.

- If there is not a publication date but a copyright date is available, you may use the copyright date.
- If there is no date at all, you must estimate a date or replace the unknown digits with the letter 'u.' EXAMPLE: 19uu.

**Edit** the remainder of the tags as appropriate for your item.

- 001 – Do nothing!
- 005 – Do nothing!
- 006 – Do nothing!
- 007 – Do nothing!

**\*010 – LCCN – Library of Congress Control number**  
**Delete** "LCCN" and **replace** with the number if appropriate or else delete the tag.

**\*020 - ISBN**  
**Delete** "ISBN" and **replace** with the 10 or 13 digit number. Do not use dashes or spaces. If your item does not have an ISBN, delete the tag.

LCCN	010	LCCN
ISBN	020	ISBN (NO HYPHENS)
Cataloging source	040	SCHOOL LC CODE
Personal Author	100 1	LAST NAME, FIRST NAME,  dDATES.
Title	245 10	EBOOK TEMPLATE  h[electronic resource] :  bREMAINDER OF TITLE //  cSTATEMENT OF RESPONSIBILITY
Variant title	246	VARYING FORM OF THE TITLE
Edition	250	EDITION STATEMENT.
Publication info	260	LOCATION :  bPUBLISHER,  cPUBLICATION DATE.
Physical descrip	300	1 online resource (XXX p.) :  bill.
General Note	500	XXXXXXXXXXXX.
Bibliography note	504	Includes bibliographic references (p. XX-XX) and index.
Contents Note	505	TITLE -- TITLE -- TITLE.
Contents Note	505	TITLE / by AUTHOR -- TITLE / by AUTHOR -- TITLE / by AUTHOR.
Contents Note	505	v. 1. TITLE OR PART -- v. 2. TITLE OR PART -- v. 3. TITLE OR PART.
Summary	520	XXXXXXXXXXXX.
Personal subject	600	PERSON'S LAST NAME, FIRST NAME,  dDATES.
Subject term	650	TOPICAL SUBJECT.
Geographic term	651	GEOGRAPHIC SUBJECT.
Genre index term	655 0	Electronic books.
Local subject	690	eBook  blocal.
Added author	700	PERSON'S LAST NAME, FIRST NAME,  dDATES.
Electronic resource	856 40	uhttp://XXX.XXXXX.XX/ yRead eBook.
INFOhio template	989	Original Record

**\*040 – CATALOGING SOURCE**

**Delete** "SCHOOL LC CODE" and **replace** with your school's Library of Congress (LC/NUC) code. Remember, it is case sensitive. If you don't know your school's code, please look it up here: <http://www.infohio.org/UC/LOCcodesRev.html>

Example: 040 OLmlUC

**\*100 – PERSONAL AUTHOR**

Use this tag if your item was written by a single person. If the work is a compilation by an editor or several authors, (ie. a video or encyclopedia), delete this tag and enter their names in the 700 tag.

**Delete** "LAST NAME, FIRST NAME" and **replace** with the author's name in that format. If you know the author's birth / death dates **delete** "DATES" and **enter** them. If you do not know the author's birth / death dates, **delete** "|dDATES" and replace comma with a period.

Example: 100 1 Mitchell, Margaret,|d1900-1949.

**\*245 – TITLE**

245	10	EBOOK TEMPLATE h[electronic resource] : bREMAINDER OF TITLE / cSTATEMENT OF RESPONSIBILITY.
-----	----	---

The first indicator tells if there is a main author in the 100 tag. If so, it should be a 1 (one). If the work is the compilation of many authors and there is no 100 tag, the first indicator should be changed to a 0 (zero).

Examples:

245 10 Charlotte's web /|cby E.B. White ; pictures by Garth Williams.

The second indicator is what determines how the title will sort alphabetically. Spaces count as a character. **Determine** if it should remain 0 or be changed.

Examples:

If no initial article enter a zero ( 0 )	245 10	Gone with the wind.
A = 2                      An = 3	245 12	A raisin in the sun.
The = 4                    Les = 4	245 14	The plays of Oscar Wilde.

**Delete** "EBOOK TEMPLATE" and **replace** with the item's title as it appears on the title page. **DO NOT DELETE** |h[electronic resource]

Example: 245 00 Chemistry|h[electronic resource].

**Delete** "REMAINDER OF TITLE" and **replace** with remainder of the title or delete "[:|REMAINDER OF TITLE". There should be a period at the end if there is no |c.

Example: 245 00 Chemistry|h[electronic resource] :|bfoundations and applications.

**Delete** "STATEMENT OF RESPONSIBILITY" and **replace** with the author, illustrator, translator, editor, etc. Enter name as it appears on the title page. Or delete " /|cSTATEMENT OF RESPONSIBILITY."

Example: 245 00 Chemistry|h[electronic resource] :|bfoundations and applications / |cedited by J.J. Lagowski.

**246 – Variant title**

This is most commonly used for items that have numbers or abbreviations in the title and is needed so either format will yield results in a search. If the title of your item has variations, **delete** "VARYING FORM OF THE TITLE" and **replace** with the alternate title. If there is no variant title, delete the tag.

Example:

245 One Hundred and One Dalmatians.  
246 101 Dalmatians

#### 250 – Edition Statement

**Delete** "EDITION STATEMENT" and **replace** with the edition (usually found on the title page). If there is no edition statement, delete the tag.

Example: 250 1st ed.

#### \*260 – PUBLICATION INFORMATION

**Delete** "LOCATION" and **replace** with the place of publication

**Delete** "PUBLISHER" and **replace** with the name of the publisher or distributor

**Delete** "PUBLICATION DATE" and **replace** with publication or distribution date.

**NOTE:** This MUST match the date entered in the leader in the Date1 field.

Example: 260 London :|bMacmillan,|c1967.  
260 New York, NY :|bMacmillan,|c1999.

If there is no date of publication but a copyright date is available, you may use the copyright date preceded by the letter 'c' to identify it as a copyright date.

Example: 260 London :|bMacmillan,|cc1965.

#### \*300 – PHYSICAL DESCRIPTION

Your template will have the basic fields for your item type. **Replace** any XXXXs with the appropriate information based on the print version. If you do not want some of the subfields in this tag, you must remove the punctuation preceding it, the pipe, subfield letter, and it's text.

Examples:

300 1 online resource (322 p.)

#### 500 – General Note

This tag is for information you want on the record, but there isn't a designated field for it. **Delete** the XXXXs and **replace** with your information. If you don't want a general note, delete the tag.

Example:

500 Includes bibliographical references and index.

#### 504 – Bibliography Note

If your item contains a bibliography, **delete** the XXs and **replace** with the page numbers of the bibliography. If there is no bibliography, delete the tag.

Example: 504 Includes bibliographic references (p. 320-324) and index.

### 505 – Contents Note

This field is used to list titles contained in your item (list of short story titles, titles on one video, etc.) Information in a 505 tag will come up in a title search. **Select** the one format that best fits your item and **delete** the other 505 tags. In all formats, titles are separated by space, dash, dash, space.

**NOTE:** *If you want to include authors as in the 2<sup>nd</sup> example below, they will not be searchable by author. You must enter the author's name in a 700 tag to search by author.*

Examples:

- 505 The trappings of power -- Upon reflection -- Pot luck -- A time to dance.
- 505 On my way to school / by Jim Smith -- It happened one time at lunch / by Angela Dime -- The day it snowed / by Laura Wilson.
- 505 v. 1. 1900-1945 -- v. 2. 1945-1996.

If your item doesn't contain more than one title, **delete** all three 505 tags.

### 520 – Summary

**Delete** the text on template and **replace** with a summary of the contents. If you don't want a summary, delete the tag.

Example:

- 520 When the Chamber of Secrets is opened again at the Hogwarts School for Witchcraft and Wizardry, second-year student Harry Potter finds himself in danger from a dark power that has once more been released on the school.

### 521 – Audience

**Delete** the text on the template and **replace** with intended audience.

Examples:

- 521 Elementary.
- 521 gr. 7-9.

### \*6XX Subject

You should include at least one subject in your record to facilitate searching in the online catalog. You may include as many as you wish. Determine if your item is about a person, place, or something else and then select the appropriate tag(s) below to enter the subject(s). If you wish to add more subjects, put your cursor in the 6XX tag and click the Add a Field helper. Delete any unused 6XX tags.

#### \*600 – Personal Subject

If your item is about a person, **delete** the text, and **replace** with the name (last name first). If your item is not about a person, delete the 600 tag.

- Example:
- 600 Lincoln, Abraham.
  - 600 Lincoln, Abraham,|d1809-1865.

#### \*650 – Subject Term

If your subject is anything other than a person or place, **delete** all the text in the 650 field and **replace** with a subject term. See Sirsi Online Manual 12.6d for help on selecting subject headings.

Examples:

650 United States|xHistory|yCivil War, 1861-1865.  
650 United States|xHistory|yCivil War, 1861-1865|vFiction.

**\*651 – Geographic Term**

If your item is about a geographical location, **delete** all the text in the 651 field and **replace** with the location. If your subject is not a geographical location, delete the tag.

Examples:

651 Paris (France)  
651 Columbus (Ohio)|vMaps.

655 Genre - DO NOT DELETE.

655 0 Electronic books.

690 Local Subject – DO NOT DELETE

690 eBook|2local.

**7XX – Added Author**

If your item has been written by multiple authors or contributors, **select** the appropriate 7XX tag. Entries in these tags are searchable by author. If your item is the work of a single person entered in the 100 tag, **delete** all three 7XX tags.

700 – Use this for specifically named authors or contributors. You can also use this tag to add authors of titles in a 505 tag. **Delete** “PERSON’S LAST NAME, FIRST NAME” and **replace** with author - last name first. You should add a 700 tag for each author you include. Put your cursor in the 700 tag and click the Add a Field helper. You can add as many authors and 700 tags as you need.

Examples:

700 Steinbeck, John.  
700 Hemingway, Ernest.

710 – Use this tag if your item was created by a corporation. **Delete** “CORPORATE NAME” and **replace** with the name of the corporation.

Example:

710 Creative Adventures.  
710 Disney Enterprises, Inc.

711- Use this tag if your item was created by sponsors of a meeting. Delete “MEETING NAME” and replace with the name of the meeting.

Example: 711 SirsiDynix Super Conference 2008.

**730 – Uniform Title**

Use this tag if your item is commonly known by another title. **Delete** “UNIFORM TITLE” and **replace** with the alternate title. If there is no uniform title, delete the tag.

Example: 730 Bible

---

**856 – Internet site**

**Delete** “XXX.XXXXXX.XX” and enter the direct link to the ebook.

Example:

856 40 |uhttp://[galenet.galegroup.com/servlet/eBooks?ste=22&docq|yRead](http://galenet.galegroup.com/servlet/eBooks?ste=22&docq|yRead) eBook.

---

**\*989 – INFOhio Template**

“Original Record” must be included in your record. Do not make any changes or delete it.

## Authority Control

### Definition of Authority Control

Authority control establishes a recognized form for an entity name and uses that form whenever that particular entity name is required as an access point in a bibliographic record.

Authority records are tools used by librarians to achieve consistency among bibliographic records and provide a linking framework for related names and subjects in a catalog; this organizes the catalog to assist users in locating resources more effectively.


### Display Authority Wizard

The Display Authority Wizard allows display of a specific authority record so that the library staff may enhance a MARC record with the proper heading.


**NOTE:** Only LIB1 users have access to Authority Control functions.

#### To display an Authority Record

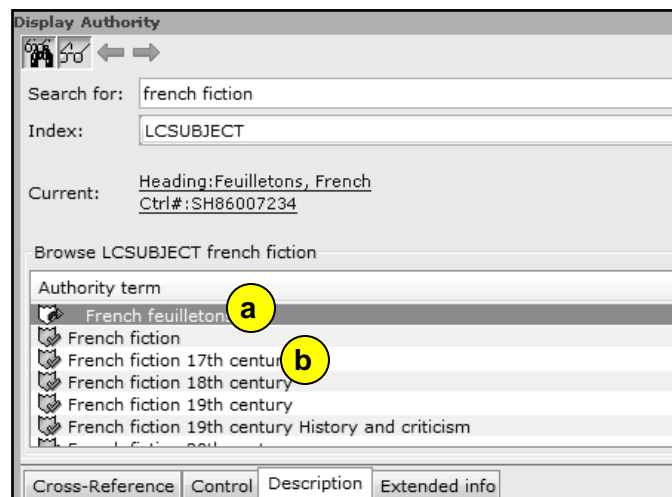
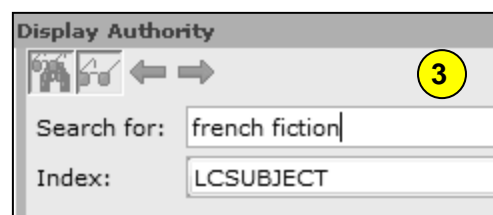
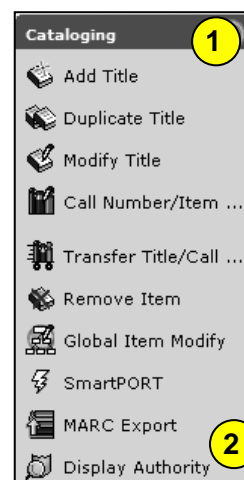
1. **Click** the **Cataloging** group wizard.
2. **Click** the **Display Authority** wizard. The Authority Search window appears.
3. **Search** for the authority record you wish to display by entering your search terms in the 'Search for' dialog box.

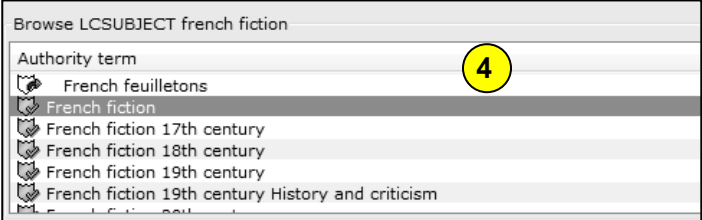
a. Established authority headings in 1xx fields are preceded by an authority icon with a green check mark, indicating that an authority record is associated with that heading. 

b. Unestablished headings in 4xx fields are preceded by a cross-reference icon with a red check mark.

 Cross-reference information displays in the cross-reference tab.

**NOTE:** The unauthorized tag only appears in workflows to library staff. The unauthorized heading appears like an authorized heading in Cat/CatJr and is searchable, however the results/hyperlinks may not be as inclusive.



4. If your search yields results, a browse list displays in the authority term pane.  

5. **Click Close** after viewing the authority record to close the wizard.

Browse LCSUBJECT french fiction

Authority term

- French feuilletons
- French fiction**
- French fiction 17th century
- French fiction 18th century
- French fiction 19th century
- French fiction 19th century History and criticism

Control Description Extended info

Status	n	Rec_Type	z
Dir/Ind	i	Roman	
Sys/Thes	a	Ser_Type	n
Subj_Use	a	Ser_Use	b
Ref_Eval	a	Upd_Proc	a
Mod_Rec		Source	

Control number	001	sh 85051802
Date	005	19890522155551.5
LC Control number	010	sh 85051802
Cataloging source	040	DLC cDLC dDLC
LC class number	053	PQ631 bPQ671 cHistory
LC class number	053	PQ1261 bPQ1279 cCollections
Subject term	150	French fiction
See also from	550	wg aFrench literature

**Note: For more detailed information or specific questions, use HELP wizard.**



## Definition of Authority Control

Authority control establishes a recognized form for an entity name and uses that form whenever that particular entity name is required as an access point in a bibliographic record.

Authority records are tools used by librarians to achieve consistency among bibliographic records and provide a linking framework for related names and subjects in a catalog; this organizes the catalog to assist users in locating resources more effectively.

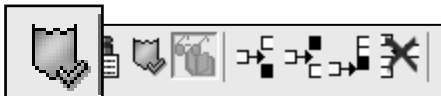
## Validate Headings Helper

The Validate Headings helper checks bibliographic headings under authority control and validates indicators and subfields. This helper displays only in wizards that allow modification of the bibliographic record.

**NOTE:** Only LIB1 users have access to the Authority Control.

### To validate headings

1. When working with marc records and a field includes ?UNAUTHORIZED in the display, use the **Validate Headings Helper** to validate headings.
2. With the record open, **click** the Validate Heading helper.



**NOTE:** The helper reviews all tags within the record, controlled through the authority file.

Label	Tag	Ind.	Contents
Key	001		105-1616413
Date/time stamp	005		20040404215252.0
ISBN	020		80756978129 (Hardback)
ISBN	020		0756978122 (Hardback)
ISBN	020		9780789171887 (Paperback)
ISBN	020		0789171880 (Paperback)
Local system #	035		(Sirsi) a36317
Cataloging source	040		0lgKLS
Title	245	02	A Multicultural Reader : [bCollection One]cJulie A. Schumacher, Editorial Director.
Edition	250		2nd ed.
Publication info	260		Logan, Iowa : [bPerfection Learning, ]c2008.
Physical descrip	300		364p. : [b] ; [c]34 cm.
Series Title	440	0	Many Voices Literature.
Bibliography note	504		Includes bibliographic references (p. 362-363) and index of titles and authors.
Summary	520		Literature textbook. Includes essays, poems, short stories and excerpts from larger, classical works.
Held by	596		LETX
Personal subject	600		Christian, Rebecca
Personal subject	600		Anello, Lucy?UNAUTHORIZED
Subject term	650		Textbooks.

3. When an UNAUTHORIZED heading is encountered, it will appear in the heading dialog box.

**650 ind: 0**

Heading: Disease?UNAUTHORIZED

Index: LCSUBJECT

Unauthorized heading

4. Review the displayed tag number, indicators, or heading problem, and **click** one of the following options.

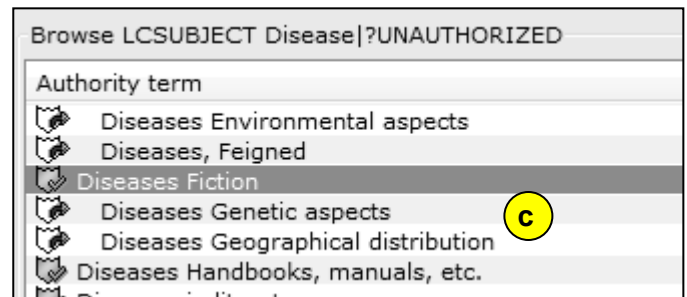
- a. Next – Validates the heading; then advances to the next UNAUTHORIZED heading.

If the heading cannot be validated it will continue to display as the current heading until it is either corrected or skipped. Invalid or skipped headings continue to display as unauthorized in your catalog.

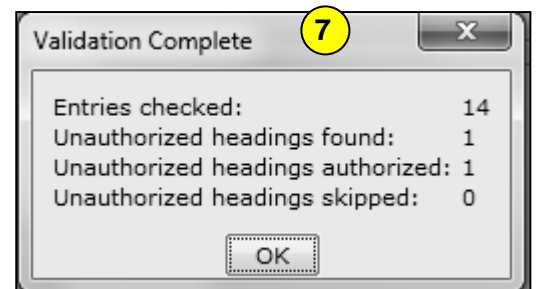


**NOTE:** *The Next button is unavailable until a heading is retrieved from the authority term list. When available, the helper displays the message “Heading selected.” If the text in the Heading box is edited, the Next button becomes unavailable again, and the message changes back to “Unauthorized heading.”*

- b. Browse – Returns user to the Authority Term Browse list.
- c. Get From List – Retrieves the currently selected authority heading from the Browse list. A scroll bar is available for moving up or down in the browse list.
- d. Skip – Skips the authorized heading displayed without making changes or validating the heading.
- e. Skip Rest – Skips the remaining headings without making additional changes.
- f. Propose – Unavailable.



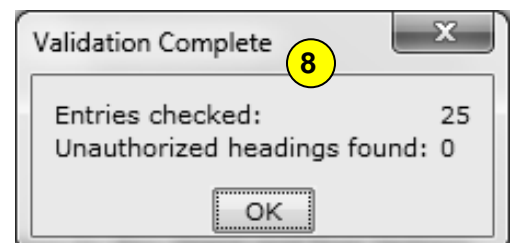
5. After validating a heading, a dialog box displays with information about the number of entries checked and the number of unauthorized headings found, authorized, and skipped. **Click OK.**



6. **Click** the **Save** button to retain the new headings.

7. Upon completion of validation, updated subject headings appear in the MARC record display. Those headings marked as UNAUTHORIZED will appear in the MARC record but will not be visible to patrons in the Web OPAC.

8. If a record has no UNAUTHORIZED headings, upon the completion of validation, a dialog box will display with the number of entries checked and the unauthorized headings found as zero.



**Note:** For more detailed information or specific questions, use **HELP** wizard.