Montana Shared Catalog (MSC)
Standard Cataloging Procedures

Revised September 2013

MSC Content Management Committee

This document is meant to be a guide for cataloging practices in the Montana Shared Catalog library consortium. For more explanation of the topics covered herein please refer to the Help menu in WorkFlows, or contact the MSC staff or your cataloging mentor.

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1. Introduction

The Montana Shared Catalog (MSC) serves a diverse group of libraries, including special, academic, school, and public libraries. The purpose of these guidelines is to create consistency within the bibliographic records in the catalog. Since all MSC libraries share these records, consistency helps everyone and makes things easier to find.

1.1 How to use this document

This document is intended to be used as a digital document. Reading this document from your computer makes the links and email addresses within the manual accessible. If links do not work, please contact the MSC or download an updated version of the manual, as links will be reviewed and corrected as necessary.

This document has been separated into sections to help catalogers based on what kind of cataloging they do. Libraries that do copy cataloging and rarely modify title/bibliographic records will primarily use section section 2 and section 3. Creating records is explained in section 4. Please note that section 4 is not an explanation of how to create original MARC records from scratch; that is beyond the scope of this manual. Instead, section 4 will explain rules for completing records in the current MSC system, SirsiDynix Symphony Workflows. Other sections cover special topics, including: modifying records (section 5); cataloging magazines (section 6); removing records (section 7); transferring items between records (section 7); interlibrary loan (Appendix A); and special cataloging situations, like book kits and eReaders (Appendix B & C). A MARC tag "cheat sheet" is also included in Appendix D. Refer to the Table of Contents for more detail.

For more information about the basics of cataloging, *MARC21 For Everyone: A Practical Guide* by Deborah Fritz is a basic resource for new catalogers.

1.2 How to get help

MSC Staff

The Montana Shared Catalog staff can be reached by phone, email, and through the help desk ticket system. To enter a help desk ticket, visit the MSC Support Webpage and enter the details of your question or problem. You can email the MSC staff at msc@mt.gov. By phone, the state library and MSC staff can be reached toll-free at 1-800-338-5087. Current contact information for individual staff can be found at the MSC "Contact Us" Web Page.

Mentors

To help librarians who do not feel comfortable cataloging or do not have experience with the cataloging module, each library has been assigned a mentor within the MSC. Your cataloging mentor can help you with many of the issues described in this manual. For details on what mentors do and don't do, please see section 8 of this document. For a current list of MSC cataloging mentors and libraries served, visit the MSC Mentors Webpage.

2. Copy Cataloging

Copy cataloging refers to two actions: attaching your item record to an existing title record in the Montana Shared Catalog; or, downloading/importing a record into the MSC and then attaching your item record. Most cataloging in the MSC is copy cataloging.

Choosing a record

As you choose records to attach to or import, please note that the **minimum** tags and indicators required by the MSC are:

- (010) Library of Congress catalog number (if available)
- (020) ISBN (if available)
- (1XX) author, when applicable
- (245) title
- (260) publication information
- (300) physical description
- (6XX) at least one subject heading for nonfiction
- (7XX) added author, when applicable

If a record for your item exists but does not have these minimum fields, import a better record from OCLC if one is available. Contact your mentor or the MSC staff to combine the records if you do not know how to overlay the old record with the new one.

A note about RDA

RDA stands for Resource Description and Access. RDA is the new cataloging standard, and RDA records are already in the Montana Shared Catalog. These records employ some different fields than previous records created using the Anglo American Cataloging Rules. MSC catalogers should be familiar with how RDA records look and should not modify or delete any pertinent fields during import or cataloging. RDA records can be identified by an "rda" in the 040 field subfield e (|e). Section 2.6 of this manual illustrates some of the most prominent changes. Please note that the Content Management Committee has decided to continue the use of General Material Designations (GMDs) in the Montana Shared Catalog for the time being, even though they are not consistent with RDA rules. For more information on GMDs, see section 5.5.

2.1 Rules for attaching your copy to a record within the MSC

PLEASE NOTE: To avoid duplication, it is the responsibility of each library to thoroughly search the catalog before downloading any new bib records into the MSC.

Getting started

When using the cataloging module, set searches to "All Libraries". If a bibliographic record is downloaded that already exists within the catalog, the new record may copy over the existing record. This can remove valuable enhancements that have been made to the bib record, such as series information or reading levels.

When searching for a bibliographic record in the MSC, try to find the title at least two different ways before importing a new record. For example, try a title or an author search. Searching by ISBN alone is not ideal because often books with different ISBN numbers can often be combined onto one record (see rules below). Search at least once using keyword search instead of browse, as not all items are indexed

in the browse search. Keep the time between searching the MSC and downloading the bibs as short as possible to avoid duplicate bib records in the catalog. When choosing between two records for the same item, the preferred record is the Library of Congress record. This record can be identified by the DLC code in the 040 Cataloging Source tag.

A record should exist for each format of an item. This means that if you have a DVD version of a movie, you should not add your holdings to the VHS version bib that is already in the system. The one exception to this is paperback books. Paperback items may be added to hardcover format bib records.

Rules for fiction

Holdings for paperback items should be attached to hardcover bibs as long as the following guidelines are followed:

<u>You do not</u> need a separate bib for items that are different due to only:

- Publication date
- Publisher
- Page number
- Book Club editions (exact page numbers can be indicated at the item level)
- Trade paperback fiction can be merged with hardcover editions.
- Book club kits can be on one record regardless of the number of items in kit.

<u>You may</u> need a separate bib for items that are different due to:

- Illustrator
- New/different Introduction or Foreword

This is your choice for your own items. If the illustrations, introduction or foreword are a minor part of the book, you may put your items on a bib that does not exactly match the item. You may do this to make it easier for your users to place holds if all of your copies or sharing group copies are on one record. However, do not add your item to a record that has MORE than your item; for example, do not add your record that has no illustrator or forward to a book that has these features. Doing so makes it difficult for patrons who want specific items to find what they need.

<u>You do</u> need a separate bib for items that are different due to:

- Format, i.e. large-type/audio/video/braille/kit
- Special edition or Abridged vs. Unabridged
- Translator

Rules for non-fiction

<u>A separate bib may exist for items that are different due to:</u>

- Publication date
- Publisher
- Page Number
- Edition
- Format
- Illustrator
- Introduction

- Translator

Rules for audio and video

You do need a separate bib for items that are different due to:

- The number of items in the set (4 CDs vs. 5 CDs)
- Different format, (Cassette vs. CD, Beta video vs. VHS video vs. DVD)
- Closed captioned for the hearing impaired
- "This film is described for people who are blind or have low vision"
- Letter box
- Wide Screen or Full Screen
- Special/anniversary edition
- Different special features (has bloopers, or other short extra content)
- Serial publications

Rules for serials, journals, and periodicals

This applies to books published annually or on some other periodic basis, as well as periodicals or magazines. For example, the World Almanac and Book of Facts should have one serial bib and all years should be attached to it instead of a different bib for every year.

You do not need a separate bib for each volume if:

- The record contains an opened ended date, (2000-)
- The page number is not indicated; instead the fact that there is a more than one volume will be indicated in the 300 field as v.
- A volume has a separate title this can be indicated in a 505 content note tag. Content notes are searchable.

You do need a new bib if:

- The title of serial changes within the first five words. If this happens:
  1. The date of the original record should be "closed" giving the year of the last date published under the old title, i.e. 2000-2003
  2. If the number of volumes published under the old title is known it may be indicated in the 300 tag, i.e. 10 v.
  3. A 785-succeeding note should be added giving the new title.

More information about cataloging serials and periodicals can be found in section 5 of this manual.

Rules for other materials

Other sections of this manual explain rules for interlibrary loans (Appendix A), books kits (Appendix B), and eReaders (Appendix C). For all other items, contact the MSC staff or your cataloging mentor for help.

2.2 Importing records not already in the MSC

If an item does not exist in the Montana Shared Catalog, then the item can be imported from OCLC or other select libraries. Before importing a new record, make sure that a similar bibliographic record does not exist; similar items can often be combined onto one bib. See section 2.1 for more detail on what formats and items can be combined on the same record.

If the only record you find in the MSC is a brief or very poor record, bring in a better record from OCLC by overlaying the brief record (preferred way) or bring in a new record and transfer the items from the brief record to the full record. If you need assistance with this, contact the MSC Staff or your cataloging mentor. Transferring directions can be found in section 7 of this manual.

Records can be imported into the catalog in two ways: batch bib load or using the SmartPort wizard in WorkFlows. Most libraries use SmartPort for importing records. Instructions for using SmartPort can be found in the next section. If you are interested in batch loading, contact the MSC staff at msc@mt.gov; System Administrators will create a template that your library can use for doing a batch bib load. Although you will need a template and MSC assistance before starting, directions for batch bib loading are also included in this section.

2.3 Importing records from OCLC using SmartPort

Individual records can be imported directly into the MSC from OCLC, the Library of Congress, or other select libraries through the Z39.50 portal SmartPort. Follow these instructions to bring new records into the MSC.

Selecting records for download

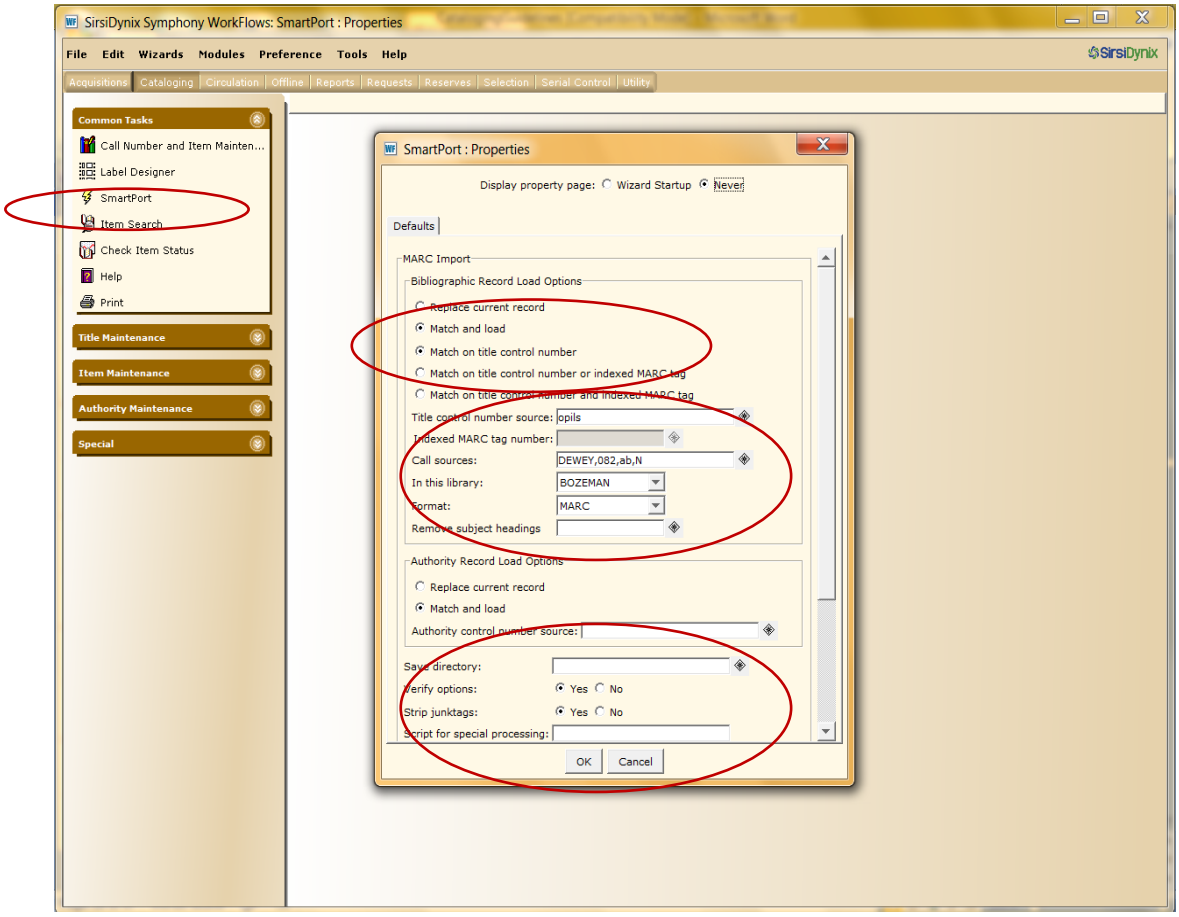
Library of Congress records (identified by a DLC in the 040 tag) are the preferred records for the MSC. CIP (brief records from DLC based on publisher galleys) may be brought into the catalog, but will need to be updated. Please see section 4.2 for instructions on updating CIP records.

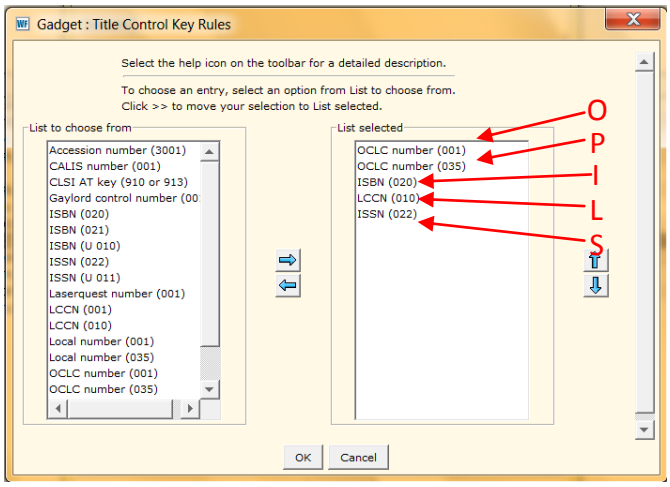
Setting up SmartPort properties

Confirm the default properties settings before you import records. These settings determine match points (oclc number, isbn, etc.) from the record to ensure that records aren't duplicated. They also determine which call number informati on will be selected from the bib for your local item. To set up or change your default settings:

1. Right click on the SmartPort wizard and select Properties.
2. ALWAYS select Match and Load as your default. You can change this on an individual basis if you are purposely overlaying a record later.
3. Select Match on title control number.
4. For title control number source, click the diamond-shaped gadget to see the selection list. Always select OCLC number (001), followed by OCLC number (035). This order is necessary to prevent duplicate records. After OCLC numbers 001 and 035, you can select ISBN, LCCN, ISSN numbers, etc. as you wish. The OCLC matchpoints display as "opils" or another series of letters on the default screen (pictured below).
5. For call source, preferences will vary depending on local call number practices. If you are a Dewey library, choose DEWEY from the Classification field and 082 in the Entry ID field. Once your preferences are established, click Add, and then OK. You can establish more than one setting.

6. For Library, choose your library (of course!)
7. Format: Generally MARC, but you can select other options if needed.
8. For strip junktags, choose YES.
9. Leave all other fields as they are.





How to find and add records with SmartPort

1. Search entire MSC collection to determine whether or not the item already exists in the catalog. You must search at least twice, with at least one search using Keyword; not all items show up in Browse and Exact searches.
2. Go to the SmartPort wizard listed under the Common Tasks tab.
3. Select system(s) to search (typically OCLC) and click Connect.
4. For OCLC, you will be asked for Input authentication. Use your library's OCLC login in the format shown below. It is the same as your login to OCLC Connexion.
   OCLCAuthorization/OCLCPassword (not case sensitive)
5. Once in, you may search by author, title, ISBN, OCLC number or other indexes.
6. Use navigation arrows at the top to move through search results.
7. When you find a record that looks correct, click Display to view the full record and verify the bibliographic description. Select the most appropriate record; records created by the Library of Congress are preferred (look for DLC in the 040/Cataloging Source field).
8. Select Capture on desired record. You will see a screen displaying your load settings. Double-check your properties and select OK if properties are correct.
   - Always select Match and Load (not replace current record)
   - Title Control Number Source should always begin with the letters "op"
9. In most cases you will see the full MARC record to be loaded at this point. When using SmartPort to a new record, consider enhancing the record to make it more useful to librarians and patrons. At the very least, General Material Designations (GMDs) should be added, if applicable. Section 5 of this manual covers the most common ways to enhance records, including series statements, reading and interest levels, and subject headings. Examples of GMDs and proper formatting can be found in section 5.5. You can also update CIP records at this point if you choose. That process is explained in section 4.2. When finished, select Save.
10. If you get message that the title was found in MSC:
    - Note the matching title control # and click OK.
    - Keeping SmartPort open, open another tab for Call Number and Item Maintenance and search for the duplicate record using the Title Control #.
    - If the record is a match and the original record is better/enhanced, return to SmartPort and select Close. A message will ask you if you want to save this record to the database: say NO.
    - If the record is a match AND: you are confident that the new record is better, and that there were no pertinent enhancements made to the original record that would be lost, select Save.
11. You may receive an error that a unique call number is needed. If necessary, give the item a bogus temporary call number which can be changed later using the Call Number and Item Maintenance wizard.
12. If you open Call Number and Item Maintenance directly after adding a record, the link to that record will appear as the last record used; this allows you to save time by not re-searching for the record.
13. SmartPort brings in a call number when a record is imported, so you do not need to add a Call Number and Item. Instead, choose Add Item. Enter item information as you would with copy cataloging within the MSC.
14. Select Save.

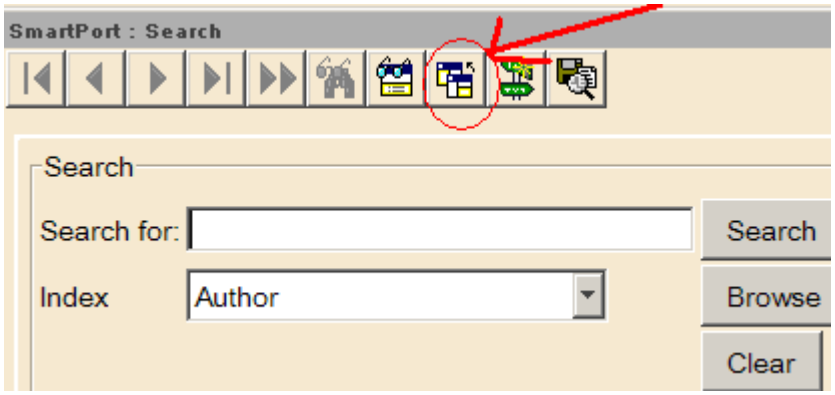
SmartPort search tips

- Search or Browse by Author: Search in Last name first name (no comma) format

- Search or Browse by Title: Begin with first significant word; if search results in error “Invalid Search Expression Near” put title in quotations marks
- Search or Browse by ISBN: Omit hyphens
- Search or Browse by ISSN: Include hyphen
- Search or Browse by LCCN: Omit hyphen
- Search or Browse by OCLC: Digits only, omit “ocm”

Advanced search option in SmartPort

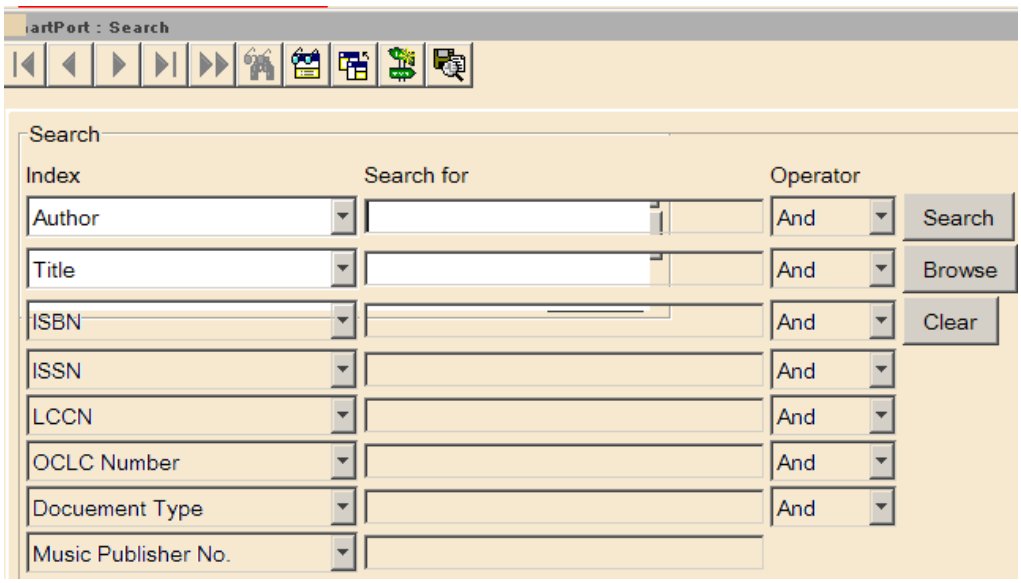
If a simple search returns too many results it is possible to narrow the search using the advanced search option in SmartPort. icon at the top of the screen. It is currently the third one from the right and looks like one screen in front of another. It allows you to search by more than one index at a time.



Search by Documents type: Use these codes in combination with other search options:

bks - Books
com - Computer Files/Electronic Resource
map - Maps
mix - Mixed Materials
rec - Sound Recording
sco - Musical Score
ser - Serials
vis - Visual Material

Click on the overlapping page icon. The following screen appears with more options to narrow the search. Click the icon again to return to a one line search.



2.4 Using vendor-supplied records

Using vendor-supplied MARC records for purchased items can save time and effort while cataloging. It requires some initial set up and work with the vendor to get MARC records that meet MSC standards. Contact the MSC Admins and get in touch with the vendor to ensure that your specifications and the quality of MARC records measure up to MSC standards.

Set up

1. Contact the vendor to give them processing specifications. Most of this information is specific to your library (barcode placement, call number prefixes, spine label placement, etc).
2. Give the vendor information about the MSC software. Contact MSC Admins for help with this.
    a. Company: SirsiDynix
    b. Product: Symphony
    c. Version: use latest version number which can be found in Workflows > Help > About. The version number is usually in the bottom of the blue square.
    d. The MARC Record Format to specify is USMARC (MicroLIF protocol '92) (852tag) divided [M]
3. If the book vendor will supply barcodes, supply them a range of barcode numbers. Keep a record of the range and do not purchase that range for use. This is to avoid duplication of barcode numbers. The MSC uses this barcode symbology: codabar, mod 10, 14 digit with last digit a checksum digit. Give them your unique initial 5 digits.

The item record information which comes with the MARC record will be located in the 949 tag field. This is the information which shows up in the Call Number/Item tab. Supply the vendor with the specific cataloging information your library uses for fields like Home Location, Item Type, and Item Categories. These must be exact and case sensitive. The list below shows which information goes to each subfield:

949 Subfields		Example	
w Class scheme	l Home location	w DEWEY	l CATALOGING
x Item Category 1	m MSC library code	x FICTION/NON-FICT/BIOG	m PARKHS
z Item Category 2	t Item Type		
p price	a Call Number	p price (vendor supplies)	t BOOK
i barcode		I barcode(vendor supplies)	a Call Number (vendor supplies)

Loading records

Marc Records from the vendor can be batch loaded in the same manner as records from any other source. Refer to the next section on batch bib loading for instructions. There are only a few specific differences. In the bibload report the following changes need to be made

- Copy Processing: s949 (Create and update copies using holding statement, with 949 in the Entry ID field)
- Call Number Load Rules: should indicate 949 subfield a for call number source.

Checking the results

After the first batch of records imported, it is important to spot-check the newly created items for accuracy. A random check of one-fourth of the imported records is recommended. If there are errors,

work with the MSC Admins and the vendor to adjust the settings. Repeat this process with every order until import process works correctly.

Checking for newly created bib records

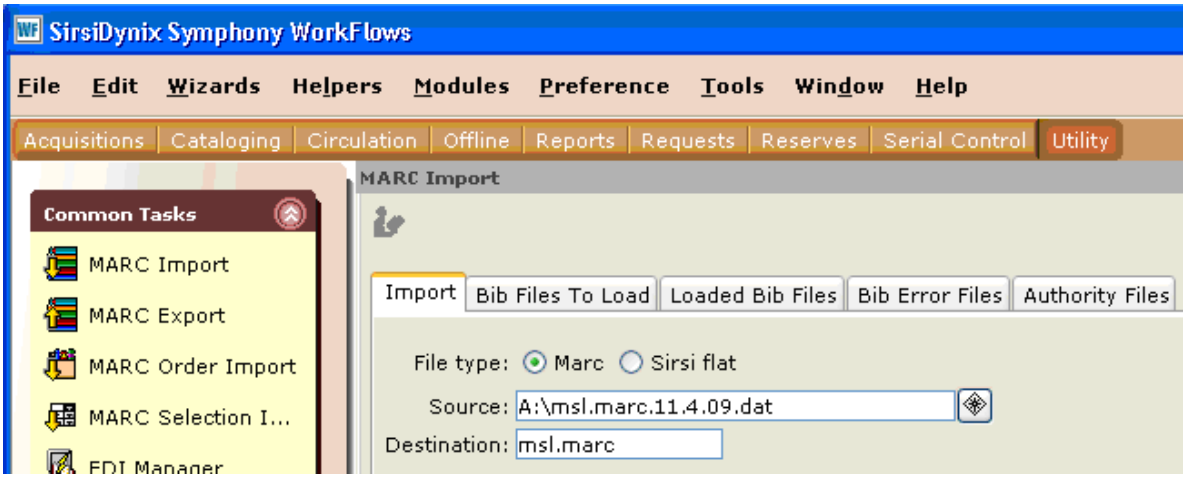
After the vendor bib load process is complete a report should be run to identify newly created bib records. This should be done after every vendor records load. Typically, these records do not come with an OCLC number and will use the ISBN as a match point. This can cause titles to be entered as a new title record since the MSC attaches hardback and paperbacks on the same bib record and the ISBN does not always match.

The report should list newly created bib records. Check each item on the list and see if it should be transferred to an existing record. Contact the MSC Admins for help creating this report.

2.5 Batch bib loading

Records from OCLC and other vendors can be imported into the MSC in batch via the batch load process. If you are interested in batch loading, contact the MSC staff at msc@mt.gov; System Administrators will create a template that your library can use for doing a batch bib load. Once a template has been set up, follow these instructions to bring in records that do not already exist in the MSC.

1. As always, search the MSC just before importing records to confirm that the title hasn't already been brought into catalog.
2. Save (export) records from cataloging source (OCLC etc) via normal practice, ie. to hard drive, shared drive, or use file from vendor.
3. Select MARC Import wizard listed under the Utility toolbar.
4. The properties for the MARC Import wizard should be set as follows: on the Behavior tab leave both BIP (Books in Print) and Non-Marc Microlif unchecked; on the Defaults tab, the Authority format is set to Topical by default. It can be left on this setting. Click OK to close the properties window.
5. On the Import tab, use the gadget to find the Source of the exported file (i.e. location on your local drive, disc, etc)
6. Enter a file name in the Destination field, using .marc for the format
7. Select Import at the bottom of the screen.
8. Is diskette ready? – Yes



9. Are there more files to upload? – Depends.
    a. Generally this will be no, but if you have more than one file to upload you can repeat these steps and append the exported files to your destination. Close window that pops up and click cancel to exit the wizard.
10. Switch from the Utility to the Reports Toolbar.
11. Select Schedule Reports wizard
12. Select Load Bibliographic Records from the Marc Import tab or [Your Library] Bib Load from your template folder if the System Administrator has created a report for you. (If you run this report from a template, most of the following steps will be automatically completed. Contact the MSC Admins to have a template created.)
13. Click on Load tab and enter selection criteria *ALWAYS Use the gadget when it's present!
14. Input file
    a. File to load – Choose the file name created when the batch file was imported.
    b. File format – select MARC
15. Title Control Processing-Key Matching
    a. Title control number matching rule – b (lowercase) – Using the gadget this is Rule 4
    b. Select Match on title control number
    c. Title control number source for incoming items – Title control number source: Click gadget to see selection list. Always select OCLC number (001) first, followed by OCLC number (035). This order is necessary to prevent duplicate records. After OCLC numbers 001 and 035, you can select ISBN, LCCN, ISSN numbers, etc. as you wish. The OCLC matchpoints display as "opils" or similar letters on the default screen.
    d. Compare multiple occurrences of a title control number field (not recommended) –leave unchecked
16. Title Control Processing—Process bibliographic delete status
    a. Matching MARC records that contain a "d" in the Leader/05 will be Loaded
17. Title Control Processing—General information
    a. Update date cataloged—select Today
    b. Default record format—usually MARC
    c. Update title control information…—leave blank
18. Title Control Processing-Bibliographic Record Processing
    a. Check only Update bibliographic record when updating records (Update publication year is checked by default)
19. Title Control Processing-Call Number And Copy Processing
    a. Holdings entry preprocessing–None
    b. Copy processing—o (Ignore holdings statements & create ONE copy only when creating a title)
    c. Call number load rules—use gadget to select the classification system and MARC tags you would like automatically loaded call numbers to be based on. Ex. DEWEY,082,,N
    d. Default holding code–select [your library]-BK, VID, etc. (These will autofill item type, locations, and categories. Contact MSC Admin with questions)
    e. Update AUTO-assigned call numbers–check
    f. Create/update price from holdings statement, 020 |c-check
20. Title Control Processing—Error Records
    a. Select Write to error file
21. Click Run Now
22. Select Finished Reports List (still in Reports toolbar)

23. Select your Finished Bib Load report from list
24. Confirm that all records have loaded properly without errors.

Now you can go back to the Cataloging toolbar and work with the call number, item id, etc.:

- Using the Call Number and Item Maintenance wizard, search for each title that you just brought into the catalog.
- Records that are given auto-generated call numbers must be edited.
- Additional copies may be added at this time.

2.6 RDA for copy catalogers

RDA stands for Resource Description and Access. RDA is the new cataloging standard, and RDA records are already in the Montana Shared Catalog. These records employ some different fields than previous records created using the Anglo American Cataloging Rules. MSC catalogers should be familiar with how RDA records look and should not modify or delete any pertinent fields during import or cataloging.

Please note that the Content Management Committee has decided to continue the use of General Material Designations (GMDs) in the Montana Shared Catalog for the time being. For more information on GMDs, see section 4.3.

What is different in an RDA record?

- International Standard Bibliographic Description bracketing: 264_1 $a[Washington, D.C.] :$b[G.P.O?] :$c[2009?]
- International Standard Bibliographic Description end of field punctuation: for fields that require a full stop (such as 245, 250, 300) add punctuation even if it ends in an abbreviation.
- Inaccuracies are transcribed as found.
- In general, do not use abbreviations unless that is how it is found on the source.
- Records no longer use Latin abbreviations such as [sic], [s.n.], [s.l.], [et al.].

MARC	RDA practices
008	Desc should = i
040	$b eng $e rda
100/110	Addition of relator terms and codes (e.g. $e author (or $e composer, etc.) $4 aut)
245 |a	Change any all CAPS title to sentence case. If title case, accept as is. Inaccuracies are transcribed as is (do not use [sic]. Create 246 with corrected title spellings.
245 |h	Obsolete in RDA. However, continue to add GMDs from MSC Cataloging Procedures until we work out display of 33X fields.
245 |c	Transcribe all names as found on source (include qualifying words and phrases); optionally may only transcribe the first name (e.g. John Doe [and six others]). Do not delete names, add if feel appropriate.
250	Transcribe as found; use only abbreviations found in the source.
264 _ 1	New field: publication statement. Do not use abbreviations unless they appear on resource. Not required to use first place in the "home country;" only first or most prominent required. Publisher name and place always required even if it is [Place of publication not identified] or [publisher not identified]
264 _ 2	New field: distribution statement
264 _ 3	New field: manufacture statement
264 _ 4	New field: copyright statement. use symbol © (e.g. 264_4 :|c©2013)

300 |a	In general do not use abbreviations (spell out “pages”), but do use abbreviations for time (e.g. 1 videodisc (73 min.)) Extent examples: 1 audio disc; 1 online resource; 3 microfiches; 2 microfilm reels; 5 microscope slides; 1 overhead transparency; 6 cards; 2 videodiscs
300 |b	Do not use abbreviations
300 |c	“cm” is a symbol; therefore it is not followed by a period unless there is a 490 field in the record. Do use the abbreviation “in.” for discs and other audio carriers
336 337 338	New fields – replacements for GMD, Content type, media type, and carrier type an example for a printed book with text content: 336: text|2rdacontent 337: unmediated|2rdamedia 338: volume|2rdacarrier
490	No abbreviations; no rule to substitute Arabic numerals for Roman; convert numbers expressed as words to numerals, including ordinal numbers
700/710	Addition of relator terms and codes (e.g. $e contributor (or $e illustrator, etc.) $4 cnt)

3. Call Number & Item Issues

This section includes issues related to creating call numbers and items. Item types and home locations can affect how an item circulates as well as identify what and where the item is. Call numbers work together with these settings to guide patrons and others in finding materials in the library. This section will help you choose and manage the settings for your library.

3.1 Choosing item types & home locations

You can create and modify item records in Call Number and Item Maintenance. This is where you can change the settings for individual items, including the Item Type and Home Location. There are three main sections to an item record.

- Call Number Information
    - Call Number – tells staff and patrons where an item is shelved
    - Class Scheme – the type of call number
    - Call Library – owning library
    - Shelving Key – displays call number with leading zeros displayed
    - Shadow Call Number – shadows every item under this call number
- Item information
    - Item ID – item's unique identifier, usually its barcode
    - Copy Number – this auto increments, and doesn't change if earlier copy is deleted, can be changed manually
    - Type – determines how item will circulate, including: loan period, fine structure, renewal limits, number of item limits, holdable, format icon in eLibrary
    - Item Library – owning library
    - Home Location – physical location of item, displays in eLibrary, holdable
    - Current Location – non-editable display field of item's status
    - Item Categories 1 – 5. Descriptive fields 1 – mostly serves as a hook for statistical purposes. See the next section on Item Categories for more details.
    - Media Desk – related to Materials Booking
    - Number of Pieces – if set to more than 1, requires override to checkin or out (generally used for items like books on cd etc)
    - Total Charges – how many times an item has checked out, editing does not affect circulation statistics
    - Price – for replacement charges for lost items, collection value
    - Permanent – checked by default, if item is not meant to be permanent, add Brief Title instead
    - Circulate – checked by default, allows circ rule to be overridden, unchecking will not prevent circulation
    - Shadow Item – shadow a single item
- Extended Information – need examples for these
    - CircNote – display at checkin and checkout
    - Public – display in eLibrary
    - Staff – displays in Workflows only

3.2 Item Categories

The Item Categories are fields that allow various classifications for statistical, reporting, and cataloging purposes. They provide ways of grouping items that make it easier to get lists and statistics for those groups and can also be used as criteria for making batch changes. They are completely optional and can be used in whatever way works best for individual libraries. Below are the recommended uses for the item categories.

- Item Category 1
  - Publics, Schools & Academics: Format, Equipment Type & Realia (Realia is non-media, like lifejackets)
  - Specials: Special use as needed
  - Item Category 1 also contains all the options that were included before Categories 3 – 5 existed and those can still be used
- Item Category 2
  NOTE: Items with Juvenile in Item Category 2 will appear in the Kids Library catalog.
  - Publics & Schools: Adult/Juvenile/YA
  - Academics: Student-Use/Faculty-Use
  - Specials: Department/Organization
  - Item Category 2 also contains all the options that were included before Categories 3 – 5 existed and those can still be used
- Item Category 3
  - All libraries: Subject, Genre, Fiction/Non-Fiction, Music Category, Language Material Designation
- Item Category 4
  - Publics & Schools: Reading/Interest Levels, HILO & Movie Ratings
  - Academic & Special: HILO, Movie Ratings & Special use as needed
- Item Category 5
  - All libraries: Funding Source/Origin (such as donation, gift, grant, etc.), Subscriptions, E-Book Source

3.3 Call number analytics

Any time items consist of only part of what is shown in the bibliographic record, use call number analytics so that the system can tell that you have broken your items into parts. For example, the bibliographic record may include five DVDs, and your library has packaged them as five different parts. Another possibility is that the record is a serial record for all versions of an item. An example is the Frommer's Guide to Alaska, which comes out annually; the record may be for all years, and call number analytics can be used to distinguish between the years.

Incorrect call number analytics affect everyone in the catalog, because they appear as a list in the patron catalog. This causes patron confusion, and also makes it exceedingly difficult for patrons and librarians to choose the exact item they want.

When you are cataloging records that require analytics, check to see what other libraries have done and use the same format unless it does not follow the rules outlined here. If format does not match MSC standards please contact the other library or the MSC so they may correct the analytics. In some cases

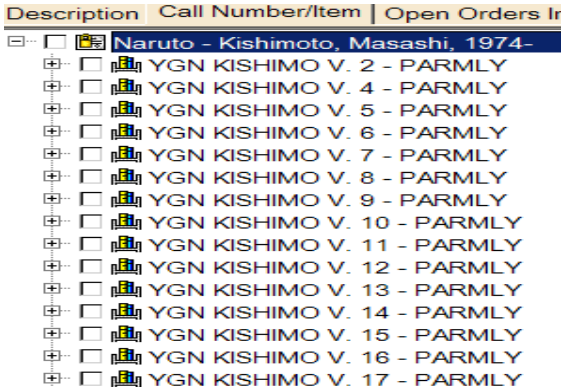
there will be records for both individual copies of an item, as well as a record for the group of items. This is common with Manga and other serial books. If you are part of a sharing group, use the records that are being used by the most members of your group. Otherwise, choose records that are cataloged the best, of the record that more MSC libraries have attached to.

Workflows will automatically recognize certain characters in call numbers to generate an analytic and also to sort each part in numerical order. These analytics will appear automatically if one adds V. space to a call number. Workflows requires a space be entered after the alpha character in order to do a proper sort. In WorkFlows the analytic is generated by |Z subfield. If you are adding the |Z manually, do not add a space between the call number and the |Z.

Do not use V. to indicate items in a series within call numbers. Instead, use #. So, for example, Harry Potter and the Sorcerer's Stone might have the call number of JF ROW #1.

Non-serial popular items

Analytics should be entered as V. # following the item's regular call number. That is: V.(space) followed by the number of the item.



EXAMPLE: 978.6 M55R V. 2 (system will add the |Z to show 978.6 M55R|ZV. 2)
EXAMPLE: F WILSON V. 22 (system will add the |Z to show F WILSON|ZV. 22)
EXAMPLE: DVD F DOW V. 1&2 (system will add the |Z to show DVD F DOW|ZV. 1&2)

Bibs with multiple formats

When items included in one bibliographic record are split into separate pieces because the parts are different formats, they should be entered as call number |z format with format spelled out completely.
EXAMPLE: LINCOLN|ZDVD and LINCOLN|ZBOOK.
EXAMPLE: DVD LAND|ZDVD and DVD LAND|ZBLU-RAY

Annual publications

Annual publications on a serial record need to add the year after the analytic. These include travel guides like Frommer's and Fodor's, as well as almanacs and record books that come out annually. The format should be: CALLNUM|ZYEAR.
EXAMPLE: 915.1 FODORS|Z2012

Multiple volumes for a single year, such as the Montana Code Annotated, should be entered as:CALLNUM|Z2011 V. 1.

Academic and special libraries

Because of the specialized nature of collections held by these libraries, they may use any other analytics that feel are necessary for their patrons. Most of these items are unique to these libraries and are not considered part of the problem with placing holds. If special libraries have popular items that are held by other libraries in the MSC they should use V.[space]number as outlined above.

Magazines and periodicals

See section 6 of this document outlines how libraries should add magazines and periodicals.

4. Creating Bibliographic Records

There may be some titles that you cannot find within the MSC or on OCLC. There are two different ways to deal with these titles. You can do original cataloging or you can add a Brief title. Please consider that the goal of the MSC is to have OCLC level records for all permanent records in the Catalog.

4.1 Creating brief titles

Brief titles can be added in the circulation module to facilitate circulation. These titles have a unique format of BRIEF rather than MARC so they can be identified easily. When the Add Brief Title wizard is selected (located under Circulation's Items tab) a template will appear which should be filled in as completely as possible, however the 245 title tag is the only required field.

These records are not considered permanent and these holdings are not added to OCLC during the OCLC upload. These titles have a home location of Cataloging so as materials are discharged they can be routed to the cataloging department for proper cataloging. Brief titles should be removed from the catalog as soon as possible. If you do add a brief title, remember to check for full bibs to replace them on a regular basis.

Brief titles can be used in to create a record that remains in the system after the item is checked in. Holdings for brief records are not added to OCLC.

When you pull up the Add Title wizard, you will get the Set Properties screen. Make the format MARC if you are doing a book. Uncheck the box if front of fixed fields; you do not need to include fixed fields in a brief record.

Libraries may enter as much information as they would like in this record. However, the **minimum** tags and indicators required by the MSC are:

- (010) Library of Congress catalog number, if available
- (020) ISBN, if available
- (1XX) author, when applicable
- (245) title and indicators
- (260) publication information
- (300) physical description
- (6XX) at least one subject heading for nonfiction
- (7XX) added author when applicable

For examples of proper formatting for each of these tags see OCLC Bib Formats available online at: http://www.oclc.org/bibformats/en/default.shtm

If you are not familiar with a particular tag you can look it up in OCLC. You do not need to include every tag you see in the examples, just those required above. Your cataloging mentor can help you with this process.

4.2 Creating permanent bibliographic records/adding titles in Workflows

The preferred method for adding original items to the MSC is to create unique records in OCLC using Connexion. Records can then be imported into the MSC using SmartPort of batch bibloading. If you are not able to create records on OCLC contact your cataloging mentor for advice.

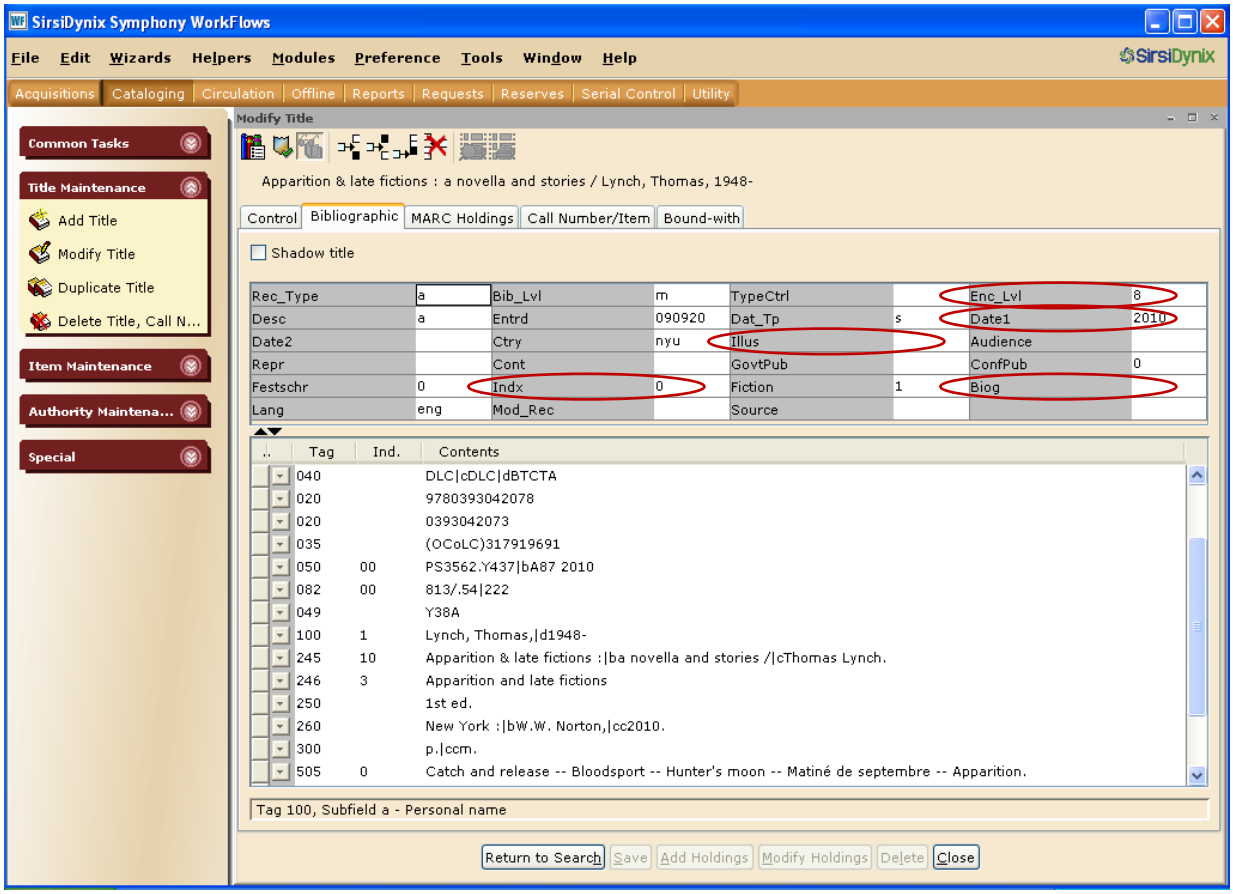
OCLC uploading

The MSC automatically uploads item additions and discards to OCLC monthly. Extracting additions and discards takes place early each calendar month through a report and extraction process done by system administrators. The process creates a file of all items with a Home Location of DISCARD and a file of all items newly created in the previous month. OCLC receives the files electronically. Based on the translation table established for the MSC, OCLC sets and deletes MSC library holdings on OCLC bibliographic records. The OCLC upload process updates MSC library OCLC holdings. It does not include creating bibliographic (title) records in OCLC. In order to create unique title records in OCLC, libraries are advised to use OCLC Connexion.

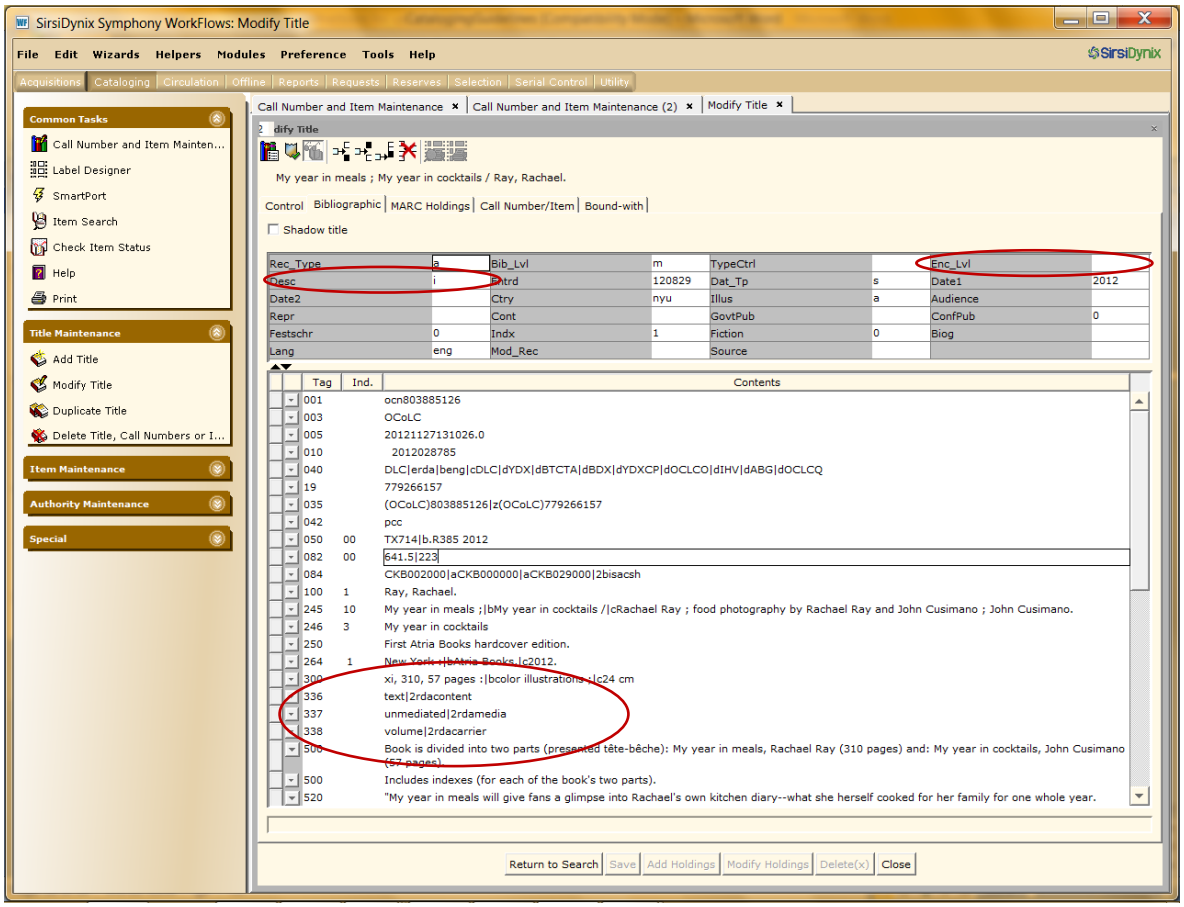
Updating CIP records

CIP stands for Cataloging in Publication. CIP records are created by the Library of Congress before the book is actually printed and published. CIP records need to be updated to include missing information like number of pages and size. A publisher may also change the layout of the title page or a subtitle before the book is printed and the title information in the CIP may not match the final book.

AACR2 CIP Record:



Updated RDA Record:



How to recognize RDA CIP Records

- Encoding Level 8 and 040 field has $a DLC $e rda $c DLC
- The Cataloging Form in the Leader will be **i** (ISBD) not **a** (AACR2)
- Physical description lacking in 300 field
- Record has a 263 field with a projected publication date
- Record has new 3XX fields (fields most commonly seen in an RDA record are 336, 337, and 338)

Select Modify Title listed under the Title Maintenance tab and then search for title to be updated. Click Modify.

Check the following fields and edit if necessary:

Fixed Fields (008) table at the top of the record

- Change the Enc_Lvl from 8 to k
- If the book is illustrated, change Illus: from blank to a for illustrations. Add b if there are maps. [These are the two most common.]
- Check the date in Date 1, change if necessary
- Check Indx:, if there is an index, supply 1
- Check Biog: a= Autobiography, b=Biography, c=Collected Biography, d=Some biographical material is included

Title (245 tag)

- Check subfields a and b (title and subtitle). They should match the title page in book exactly except for capitalization. In the bib record, only the first letter of the title and proper nouns are capitalized. Do not abbreviate any words that are not actually abbreviated on the item and do not change any capitalization used in the record.
- Check statement of responsibility (subfield c) - it should match the title page.

Publishing information (260 tag)

- If you changed the Date 1 field in the 008, the date must also be changed in the 260 tag. Note that the copyright date can't be entered by itself in an RDA record. If the book has no publication date, the copyright date should be entered as a supplied publication date, in brackets and without any copyright symbol. Optionally, the copyright date may also be entered after the actual or supplied publication date using a copyright symbol or spelled out word "copyright" instead of the © whichever appears on the item.

Projected Date of Publication (263 tag)

- Delete the 263 tag.

Physical description (300 tag)

- Edit subfield a (extent)
  Enter the number of pages, based on the item in hand. Add as 26 pages, or 32 leaves. Do not use abbreviations.
- Edit subfield b (illustrations &/or maps)
  When the item has illustrations, maps, etc., fill in the information according to AACR2 standards. Must spell out Illustrations.
- Subfield c (size in cm.)
  Height is measured in centimeters (always round up). If the book is shorter than it is wide, measure both height and width (21 x 26 cm.)

Bibliographical notes (504 tag)

- Sometimes the page numbers are left out in the CIP record; complete the information. Do not abbreviate.

EXAMPLE: 504 Includes bibliographical references (p. 389-412) and index.
EXAMPLE: 504 Filmography: p. 97-98.

Click Save when finished updating record.

5. Modifying, Editing & Improving Bibliographic Records

You may enhance records in the catalog, as well as those that have just been imported. Remember that anything added to the bib record should reflect the whole title, and not just your specific library's copy. Anything that is specific to your copy can be added at the item level.

Suggested enhancements include: series information, additional subject headings, general material designation (GMD), varying forms of title, content notes, and other notes.

To modify a title, go to Modify Title in the Title Maintenance toolbar in Cataloging.

5.1 Varying forms of the title (246)

You may need to add a varying title if:

- There is a "&" or other abbreviation in the first 5 words of the title make sure there is a 246 tracing with "and" or other abbreviation spelled out. If the 245 is "Beauty & the beast" there should be a 246 of "Beauty and the beast".
- There are abbreviations. The title "Adventures of Dr. Brown" should have a 246 of "Adventures of Doctor Brown".
- There is a number in numerals in the first 5 words then make sure there is a 246 tracing with the number spelled out. If the 245 is "40 days and nights" there should be a 246 of "Forty days and nights".

5.2 Large Print

If you have large print items in your collection, add a GMD after the title in the 245 tag, as follows:
Title|h[text (large print)]

You will also need to add a subject heading 650 tag of Large type books. The first indicator is blank and the second is a zero.
EXAMPLE: 650 _0 Large type books.

5.3 Edition statement (250)

Abridged/Unabridged — Add a 250 tag that contains the word Abridged or Unabridged to allow this information to appear on the hit list within e-Library. This is to be used with sound recordings only.

Blu-ray — For Blu-ray discs, add the following information to the 250: [Blu-ray version]

Foreign language material—You may add a 250 tag to a bib for a title that is the same in two different languages, in order to make it clearer to a patron viewing catalog search results which item is which.
EXAMPLE: Spanish language ed.

5.4 Series statements

Series tags can be used to link monographic serials published under separate titles. There are different ways to do this including using a 490 tag, or a combination of 490 and 800/830 tags. You will also find old examples of 440 tags in the catalog but the 440 tag is now obsolete so do not use it. The 490 tag should have the series as it is listed on the item. The first indicator 0 is used if the series is not traced.

The first indicator 1 is used if the series is traced. The 800/830 tags should have the series as it should be traced even if it is the same as the form in the 490 tag.

Recommendations for series
Use the same tags consistently throughout the series.

- All titles in a series should use the same form of the 800 tag with only the volume number being different.
- If a series tag needs to be modified to match the rest of the series, copy and paste the series statement from an existing record, editing the volume number as needed.
- Series tags may be added to titles in a series even if no 4xx tags exist. Use 490 tags to add a series in this case. If there is a volume number put it in subfield v.

You can see examples of proper formatting for each of these tags at OCLC Bib Formats.

EXAMPLES:

490 1 39 clues ;|vbk. 7 *This series is traced so first indicator 1 is used.*
830 0 39 clues. *The series is traced the same as the 490. The example is from the Viper's nest. 830 is used since the series is written by more than one author.*

490 1 Percy Jackson & the Olympians ;|vbk. 1
800 1 Riordan, Rick.|tPercy Jackson & the Olympians ;|vbk. 1. *Example is from The Lightning thief. 800 is used since all of the books in the series are by one author. The author's name goes first. The form of the author's name should be the same as in the 100 field.*

490 0 Pelican books *First indicator 0 is used since this is a fairly generic series title and it is unlikely that anyone would want to look it up by the title. The example is from the 1984 ed. of The Israel-Arab reader :|ba documentary history of the Middle East conflict*

5.5 General Material Designation/GMD (245 tag |h)

GMDS are used to readily identify the item type in the Title field of a record. They are designated in the subfield h of the 245 tag. The GMD is used to show what type of material is being presented by the title. It helps to distinguish between the print and other versions of a title.

EXAMPLES:
Title|h[text (large print)]
Title|h[videorecording (DVD)]
Title|h[electronic resource]

GMDs are being phased out with the implementation of RDA cataloging. However, the MSC libraries are instructed to continue adding GMDs to records, including RDA records, until further notice. This decision is in part due to patron need when finding things using the online patron catalog.

GMD's should be added to the following materials, as indicated:

- |h[text (large print)]
- |h[videorecording (DVD)]

- |h[videorecording (VHS)]
- |h[videorecording (Blu-ray)]
- |h[videorecording (Blu-ray & DVD)]
- |h[electronic resource]
- |h[electronic resource (CD-ROM)]
- |h[electronic resource (game)]
- |h[electronic resource (Playaway)]
- |h[sound recording (cassette)]
- |h[sound recording (CD)]
- |h[sound recording (MP3)]
- |h[braille]
- |h[kit]

GMD EXAMPLES:

- Death of a bore|h[text (large print)] :|ba Hamish Macbeth mystery /|cby M.C. Beaton.
- Rudy Maxa's world.|pRussia & Estonia|h[videorecording (DVD)] /|cproduced by Rudy Maxa's World Productions, Ltd. ; producer, Susan McNally.
- Sister Wendy|h[videorecording (DVD)] :|bthe complete collection /|ca BBC production.
- Walker, Texas Ranger.|nThe complete second season|h[videorecording (DVD)] /|cCBS Broadcasting Inc. ; Paramount Pictures.
- Man in nature|h[videorecording (VHS)] :|bWork as play.
- Earth|h[videorecording (Blu-ray)] /|cDisneyNature ; a BBC, Greenlight Media, Discovery Channel co-production ; a BBC Natural History Unit film ; written by Leslie Megahey, Alastair Fothergill, Mark Linfield ; producers, Alix Tidmarsh and Sophokles Tasioulis ; directed by Alastair Fothergill and Mark Linfield.
- The complete idiot's guide to bringing up baby|h[electronic resource] /|cby Signe Larson and Kevin Osborn.
- The coffee trader|h[sound recording (CD)] /|cDavid Liss.
- Tombs of Atuan|h[sound recording (cassette)] /|cby Ursula K. Le Guin.
- Natural ingredients|h[sound recording (LP)] /|cby Lucious Jackson.
- Three cups of tea|h[kit] |bone man's mission to fight terrorism and build nations—one school at a time /|cGreg Mortenson and David Oliver Relin.

5.6 Notes fields (5XX)

Fields like the 505 (Contents note) and 520 (Summary) are encouraged. All local notes should go at the item level.

Board books – Make sure the bib clearly indicates that the item is a board book and not a regular edition. Records can have either a 250 edition statement, or a 500 note saying "On board pages." If the record does not indicate board pages, please add a 500 note.

Types of 5XX notes are too numerous to list here however the following are examples of titles within the Catalog that can be referred to for as guides for proper formatting:

EXAMPLES:

- 500 General Note: See Mountaineering : the freedom of the hills
- 504 Bibliography Note: See The Zimmermann telegram
- 505 Contents Note: See Montana's grandest : historic hotels and resorts of the Treasure State
- Backroads of Montana|h[videorecording (VHS)]
- 520 Summary Note: See Lewistown Qwest Dex white & yellow pages
- 526 Accelerated Reader Note: See Storm is Coming!
- 586 Award note: See Bridge to Terabithia

5.7 ISBN Numbers

Do not add additional ISBNs to an established bib. This can create overlay and merging problems when new libraries are added. If you feel you need the ISBN that exactly matches your particular copy then put it in the holdings information for your barcode. For the same reason, if you bring in a record from OCLC that has additional ISBNs for other formats, such as Large Print or sound recordings, , please remove these additional ISBNs before bringing the records into the catalog.

5.8 Subject Headings—General (6xx tags)

If additional subject headings are needed on the bib record, please attempt to find and use authorized subject headings. Try to locate the subject heading in another record with similar subject matter, then copy and paste it into the bib you want to enhance. If you cannot find the exact heading you want to use, try to follow the example of an established heading from another bib record. Established headings are generally underlined when displaying a bib record. Headings that have yet to be established usually are followed by the word Unauthorized.

5.9 Montana-Specific Subject Headings (6xx tags)

Montana Authors

The following subject headings can be added to bib records for works created or performed by Montana residents.

650 _0 Authors, American|zMontana.
650 _0 Poets, American|zMontana.
650 _0 Musicians|zMontana.
650 _0 Musical groups|zMontana.
650 _0 Actors and actresses|zMontana.

For stories that take place in Montana use:
651 _0 Montana|vFiction.

Please use the following guidelines to determine if the author or performer qualifies as a “Montana Author”

- Currently lives in Montana

- Born and raised in Montana
- Wrote the book while living in Montana
- Lived in Montana for a substantial length of time.

5.10 Reading and interest levels including Accelerated Reader & Lexiles

Put Accelerated Reader (AR) information specific to your library in an item level public note. Be sure to give these items an item category 2 of JUVENILE. This will guarantee that the items appear in the AR section of the Kids' Library in e-Library.

Optionally, you can add a 526 to the bib for information that applies universally to the title. For consistent records throughout the catalog, please enter AR or other reading program information as follows: 526 0_ |aProgram Name |bInterest level |cReading level |dTitle point level

Examples:

526: 0 Accelerated Reader AR-ATOS|c4.4|d0.5

526: 0 Reading Counts RC|c5.2|d2.0

5.11 Electronic location and access/adding website urls (856)

MARC field 856 contains URLs and descriptive text to access an electronic resource or supplementary material in electronic format. This field is used in electronic resource bibliographic records including ebooks, electronic journals, and websites. It may also be used in non-electronic resource bibliographic records when an electronic version or electronic supplementary material is available.

URLs in this field may include a complete electronic version of the resource, a portion of the resource, or additional information related to the resource. This field is repeatable.

When bringing in a new bibliographic record that contains an 856 field:

1. Confirm the validity of each URL by actually going to and viewing the link. The URL is entered in subfield u.
    a. Retain all working URLs.
    b. If in doubt about the validity of the URL, leave the URL in the record. This may occur because of membership access restrictions or website connectivity problems. Note: do not delete a URL simply because your library does not subscribe to a particular resource as other MSC libraries may provide access or patrons may have the required membership.
    c. If the URL is confirmed invalid, delete the entire 856 field.
    d. If the URL is confirmed unusable (e.g. links to non-MSC library EZProxy server), delete the entire 856 field.
    e. Remove duplicate URLs.
2. Confirm that each URL is entered in a separate 856 field. Add a new 856 field as necessary.
3. Add an 856 field if a known URL is not entered following the guidelines.
4. Add or edit descriptive text following guidelines below. Descriptive text is entered in subfield 3 or z.

Guidelines for maintaining URLs in the 856 field

MSC requires two elements in an 856 field: a URL and descriptive text. The text replaces the URL link in the OPAC display. The exact wording of the text will vary and is left to cataloger judgment. Use the link text flowchart as a guide. When constructing text keep all MSC libraries and patron display a primary concern.

A resource may have more than one URL associated with it. In those cases the bibliographic record will have multiple 856 fields. Include all unique URLs for all available or known versions of a resource.

Use the following elements when working in the 856 field.

First indicator	Second indicator	Subfield code	Data to input in subfield
1 - FTP	0 – Resource	z	Descriptive text to display in place of the URL
4 - HTTP	1 – Version of resource	3	Descriptive text to display in place of the URL
	2 – Related resource	u	URL

Required:

- All 856 fields should have a total of two subfields: one 3 or z, and one u.
    - If an incoming 856 has both a subfield 3 and z, combine descriptive text into one subfield z, deleting the subfield 3.
    - Subfield order does not matter in MSC as it does not affect OPAC display.
- Multiple URLs should be recorded in separate 856 fields within a bibliographic record. All URLs will display in the item record in the OPAC.
- Put the URL that provides the most complete and open access first in the bibliographic record. This is the URL that displays on the initial search result screen.
- Do not enter any spaces before, after, or between delimiters and subfield codes.

EXAMPLES:

856 41 |zClick here for online access|uhttp://purl.access.gop.gov/GP/LPS1631
856 41 |zClick here for Table of Contents|uhttp://catdir.loc.gov/catdir/toc/ecip0614/8284.html
856 41 |zClick here to access current issue|uhttp://www.ABCjournal.com

Subfield code z versus 3

MSC recommends using subfield z for descriptive text. However, many incoming records have descriptive text entered in subfield 3. MSC settings do not require changing the subfield code to z; simply edit the descriptive text as appropriate. When creating a new 856, use subfield z as it is the more precise code.

Considerations when constructing or editing descriptive text

- Use natural language. Construct descriptive text so that all information flows in one string. If you are uncertain how a string reads, view record in the OPAC. This often helps you read through patron eyes.

- Some things should be explicitly stated; some things may be clear enough on their own. Some things are important; some things are extraneous. You do not need to include every bit of information about the electronic access in a note, but do not assume everything is obvious. The goal is to find the balance.
- Consider adding punctuation when putting together a note that includes different types of information. Commas, parenthesis, and dashes can aid in overall readability.

Types of notes (see flowchart for sample text)

Basic note: REQUIRED add a simple descriptive note to replace the URL link. This may incorporate one or more of the types of notes listed below.

Restricted access: REQUIRED
If access is not provided to all MSC users, you must identify your library or user group. Each library must have its own restricted access note in its own 856 field. Do not simply add your library to an existing 856 restriction note. Instead create a new 856 field. Abide by the wording of the original note.
If access is not provided to all MSC members and your library does not provide access, leave the URL in the record. Another member library may provide access now or in the future. Do put the user restriction in a note.

Portion: IMPORTANT add if the URL links to only a portion of the resource. This includes table of contents, specific volumes or sections, etc.

Coverage: IMPORTANT add if complete coverage of the resource is not provided.

Related resource: IMPORTANT add if URL links to online content other than resource or any portion of the resource. This includes author's website, reviews, agency website, etc.

FTP link: IMPORTANT add if the URL is to an FTP site to differentiate from a HTTP URL.

Navigation: LOCAL DECISION consider adding if URL does not link directly to the resource and the next step to access the resource is not obvious.

Provider name: LOCAL DECISION consider adding if access is offered by more than one provider or if knowing the provider is meaningful to library user group.

How to Handle Link Text: a helpful flowchart

Follow the chart for suggested link text.

Does the link offer access to the complete version of the resource to all MSC libraries and

YES →

Consider this link text in the |z:
|zClick here to access this title online
|zClick here for online access to this journal
|zClick here for online access
|zClick here to view this report

NO ↓

Does the link offer access to the complete version, but only to

YES →

Consider this link text in the |z:
|zClick here to access this title online (Missoula Public Library only)
|zOnline access available to Billings Clinic staff
|zClick here for online access (available to Philipsburg Public Library patrons)

NO ↓

Does the link offer limited coverage or access to only a portion

YES →

Consider this link text in the |z:
|zClick here for Table of Contents
|zTable of Contents
|zOnline access to current year available to PLUK Library users
|zClick here to listen to an excerpt

NO ↓

Does the link require specific instructions to access the resource once you click through?

YES →

Consider this link text in the |z:
|zClick here to connect to this title online (Click on "American Biology Teacher Fulltext")
|zClick here to access this title online (Follow link and select "Historical Records Fulltext")

NO ↓

Does the resource require a password or other direction from your library staff?

YES →

Consider this link text in the |z:
|zClick here for online access (Password required; please contact your local librarian)
|zClick here for online access (Mineral County Public Library only, contact your librarian for password access)

NO ↓

Does your link not fit into any of these categories, or do you have concerns about what your linked text

YES →

Contact your MSC Cataloging Mentor.
To find out who your library's cataloging mentor is, visit http://msl.mt.gov/For_Librarians/Montana_Shared_Catalog/Cataloging/msccatalogingmentors.asp
OR
Contact the MSC Staff at msc@mt.gov .

6. Cataloging magazines & periodicals

6.1 Using the Serials Module

SirsiDynix Symphony Workflows does include a Serials Module, which allows libraries to create periodical predictions and manage higher volumes of periodicals within the system. If your library manages a lot of periodicals and you are interested in using this module, some special training is needed. Contact MSC Staff for details.

6.2 Entering Individual Issues of Periodicals into the MSC

To enter an individual periodical, search for a serial record in the Montana Shared Catalog. If a record does not exist, a record must be imported from OCLC using SmartPort. The process is the same as it is for importing other records.

An easy method to search for serial records in the MSC (at least the first time):

1. Select Periodical Title for the Index search.
2. Set the Library default to Msla-Main or FCL-Main or Bozeman (these libraries have established serial records for many of the most common serials).
3. There may still be several titles to select from the list. View the holdings to see if multiple holdings have been added by other libraries. This should be the current serial record.
4. Go to Modify record > Add call number
5. Create a call number using the methods listed below. In general, the call number will have two parts: for part 1, you may wish to call it Magazine, Mag, or nothing at all; for part 2, add the date using the rules listed below. Do not add extra spaces or punctuation in the call number.
6. IMPORTANT: use the class scheme of Dewey unless your library uses another class scheme.

Advantages for using this method

- All holdings will be on **one** record instead of many.
- Holdings records will be in order first by year, then alphabetical by month (FEB will file before JAN, JAN before NOV), and one year can be seen at a glance.
- This keeps bibliographic records to a minimum.
- No clean-up is needed for entries in the future.
- Discarding of issues will be simpler and complete.
- After adding a holding, you will be able to search for the serial record under your own library designation.

Call number date rules for periodicals

- Enter four digits to signify years. Do not use Roman numerals.

EXAMPLE: 2011

- If a span of years is indicated, enter one four-digit year separated by a slash for the addition of the second year using only two digits.

EXAMPLE: 2011/12

- Abbreviate months and seasons (with the exception of FALL, do not use AUT) to their first three letters; capitalize.

EXAMPLES:

JAN, FEB, MAR, APR, MAY, JUN, JUL, AUG, SEP, OCT, NOV, DEC
WIN, SPR, SUM, FALL
2011 MAR
2012 DEC 25
2000 SUM
2011 JAN/APR
2010/2011 DEC/JAN 28/4

- Enter a slash between dates for multiple issues combined into one issue.

EXAMPLE: 2011 Oct 17/24

- Enter a slash to separate combined months or seasons.

EXAMPLES:

2009 JUN/JUL

1998 FALL/WIN

- Enter month or season analytics in one of the following formats, so that Workflows will automatically generate a |z into the call number. The |z designates what part or specific periodical you are entering.

SEP 2011	enter as	2011 SEP
SEP, 2011	enter as	2011 SEP
FALL 2011	enter as	2011 FALL
FALL, 2011	enter as	2011 SEP/OCT
SEP/OCT 2011	enter as	2011 SEP/OCT
SEP/OCT, 2011	enter as	2011 SEP/OCT

7. Removing and Transferring Records

When a record is incorrect or the item is no longer in use, it can be discarded, deleted, or transferred to a better record.

7.1 Transferring records

When multiple bib records exist in the catalog for the same item (or items that are deemed the same according to these procedures) the better record should be selected (See Selecting Bib Records) and all holdings should be transferred from the duplicate record to the better record.

*Note: most libraries only have the ability to transfer their own items; but some members of sharing groups do have the ability to transfer other libraries' items. If you notice a problem with another library's items please do not transfer their items, just alert them to the issue. You can also contact your cataloging mentor or MSC staff.

Setup

Right click on Transfer Titles, Call Numbers or Items, found in the Special toolbar in Cataloging. On the Behavior tab, check the boxes next to "Allow Transfer of all existing call numbers and items in a title." Also check the box for "Prompt for confirmation before transferring all call numbers and items." Otherwise you will not be able to transfer any of your items which are the last item on a bib record. As noted above, this will not allow you to edit other libraries' items unless you already had that ability.

How to transfer

1. From the Cataloging toolbar select Transfer Titles, Call Numbers, or Items listed under the Special toolbar.
2. Search for the duplicate records you wish to work with.
3. Review all appropriate records to determine which is the most complete and accurate.
4. If possible, retain the Library of Congress record (DLC in 040 tag), transferring less desirable records to that record.
5. You can use the Display Bibliographic Description wizard to review the bib records.
6. If you wish to retain any information like an ISBN number from the "old" record, it's helpful to write that down before you complete the transfer.
7. Select the record that will be transferred and click Add to Tree. Repeat this step for the record you would like to transfer to. Both records will now be listed in the center section.
8. Click the plus sign next to the title you want to transfer. Choose the call number and item of the record and click Retain for Transfer. The record will become bold and italicized once you've selected it for transfer.
9. Select the title of the destination record and click Transfer.
10. Note: These steps describe transferring call numbers with items to a different title. The level at which you select items will affect the transfer. See chart below for information on transferring other levels of records.

Item ID level Call Number level Title/Bib record level

"To be Transferred" Level	"Destination"Level	Results
Item ID	• Call Number • Item ID	Item ID transfers and becomes next copy number (ex. copy 2) under the Destination Call Number. The item loses the call number it had before the transfer.
Call Number	• Title • Call Number • Item ID	All of these transfers retain the original Call number with the item Id. If the transfer removes the last item attached to a call number or title you may get a message alerting you about the removal the old record.
Title	• Title • Call Number • Item ID	All of these transfers retain the original Call number with the item Id. If the transfer removes the last item attached to a call number or title you may get a message alerting you about the removal the old record.

- When you transfer the last item attached to a title, you will prompted to approve the removal of that title if you set your properties as recommended above. Accept the prompt the empty bib record will be removed from the system.
- Items transferred within the MSC in this manner are not uploaded to OCLC as deletions or additions. You'll need to do this work separately in Connexion after you complete the transfer in Workflows.

7.2 Choosing discard or delete

There are two ways to remove records from the MSC: Delete and Discard. OCLC holdings are NOT updated when an item or title is deleted. In general, if your library has more than one barcode/item ID left on the bib record, you can use the delete option. Once there is only one barcode belonging to your library on the bib record, you should use the discard option.

Use DELETE when you want to:

- Remove a second or higher copy of an item on a title where you have multiple items on the same bib record. This also applies to books on a serial bib record.
- Remove brief records (including ILLs) that were never submitted to OCLC.

Use DISCARD when:

- It is your library's last copy on that bib record and the holding also needs to be removed from OCLC.

Notes about the discard process

- All items with a home location of DISCARD will be removed from both the MSC and OCLC once a month by MSC Admins. A count of the number of items each library discarded is emailed to the MSC Discussion list.
- Any item that is charged, has a hold, is under serial control, or is linked to an order record will not be removed. A list of all such items will be emailed to the MSC Discussion list for investigation. This report is called the "Problem Discard List" and each library is responsible for reconciling these items. After bills, holds, etc. have been addressed, the item can be left in DISCARD until the next month. DISCARD is a shadowed home location, so items will not appear to the public in the online catalog.

Delete using Call Number and Item Maintenance

*Note: this is used for deleting call numbers and items. For deleting titles/bib records, please see 6.2.3.

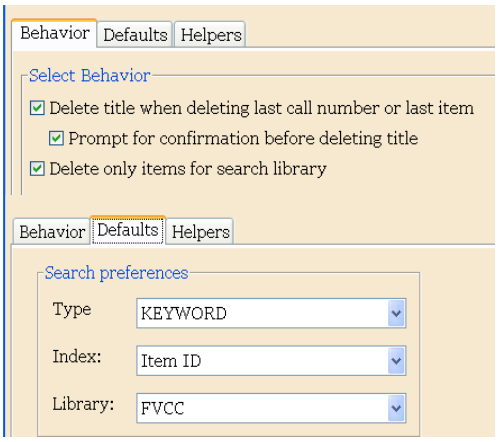
1. Click on the Call Number and Item Maintenance wizard. Search for the title that you want to work with. Highlight it.
2. Click on Modify. Make sure you are in the Call Number/Item tab.
3. Click on the item or call number you want to delete, and click on the Delete button. (If you delete a call number, all the items below it will be deleted. If you only want to delete a single copy, highlight the item level (where the barcode is).

Delete using Delete Title, Call Numbers or Items

1. Make sure item is checked-in and there are no holds or bills attached to the item record. Also confirm that OCLC holdings do not need to be updated if using Delete.
2. Click on the Delete Title, Call Numbers or Items wizard found in the Title Maintenance group of wizards.
3. Check your Properties settings (right click on wizard and select Properties)

Check the "Delete only items for search library" box as a safety measure.

Make sure you are set to search by Item ID and your library only.



4. Click OK when Properties are set.
5. Search for item by scanning barcode. You need to click the box next to the item you want to delete. The title will be bolded and in italics. Then click the Delete button.

Discard using Call Number and Item Maintenance

1. Make sure item is checked-in and there are no holds or bills attached to the item record.
2. Set the Call Number and Item Maintenance wizard properties to search by Item ID (right-click Wizard, select Properties from menu, & select Item ID for "Preferred search index".
3. Search for item by scanning barcode. Change the "Home Location" to Discard.
4. This will not immediately remove the record. The record will remain in the system until the first of the month when the OCLC Upload and OCLC Discard reports are run. At that time the record will disappear. DISCARD is a shadowed location so the record will not appear to the public on the online card catalog.

Discard using Global Item Modification

Use this procedure when you have multiple items to discard at once. Before starting, make sure items are checked-in and there are no holds or bills attached to the item records. Otherwise, they may show up on the Problem Discard Report.

1. Select Global Item Modification from the Item Maintenance toolbar.
2. Choose DISCARD from the drop down list for Home Location. Do not change any other values.
3. Scan barcodes of items to be discarded. You will see each item being modified as you go.

Replacing a copy – discard or delete old copy

If an item is the LAST copy held by an individual library and a new copy is ordered:

1. If the new on-order copy matches the existing bib, after a new on-order copy exists, you may remove the old copy using a Delete procedure.
2. If the new on-order copy does <u>not</u> match existing bib, i.e., a paperback or new edition is being ordered instead, use Discard to remove OCLC holdings.

8. Resources & Contacts

Guidance for content and management of the records in the Montana Shared Catalog comes from the MSC Content Management Committee. A current list of Content Management Committee members is available on the MSC website. The website also includes a description of the committee's functions and operations.

8.1 All about mentors

To help libraries that do not feel very comfortable cataloging or do not feel as comfortable with the cataloging module, each library has been assigned a mentor. Please contact your mentor if you have any questions that relate to cataloging. Click here for a current list of MSC cataloging mentors and libraries served.

Record review

If you have cataloged a title in OCLC Connexion or within the MSC and would like someone with a little more cataloging experience to look at it, contact your mentor. Have your record's OCLC number of Title Control number ready so that your mentor can easily find it. The review process can consist of checking for accurate tags, indicators, fixed fields, authorities, etc. Mentors must be notified when a new record needs review. For easy communication, it is better to contact your mentor before you catalog a new record so that you can discuss where and how to catalog the record for easy access later. The cataloging mentor will strive to review records in a timely fashion and will make suggestions for approval.

8.2 MSC website & contacts

MSC Website: http://libraries.montanastatelibrary.org/statewide-projects/montana-shared-catalog/

Contact the MSC Admins at msc@mt.gov. Individual staff member contact information can be found at the MSC website here.

Appendix A – Interlibrary loan

Please follow the following guidelines when creating temporary records for interlibrary loans:

Settings for incoming ILLs

- Create a brief record using the Add Brief Title wizard—do not attach to an existing record within the MSC or import a record for your ILL title.
- Shadow the item so that it does not appear in the OPAC. You can do this in Add Brief Title Properties, or after you have created the item in Call Number in Item Maintenance. To reach the properties, right click on the Add Brief Title wizard.
- Use the Item Type ILL-MAT.
- Use one of the following Home Locations: ILL-IN, ILL-IN-MT, and ILL-IN-OOS. Use ILL-IN-MT and ILL-IN-OOS if you would like to track items borrowed from Montana libraries and out of state libraries separately.

ILL titles

- As with other brief records, the title should be IN ALL CAPS. This helps other libraries to immediately recognize the record as a brief title.
- Type ILL before the title. For example, ILL FACEBOOK FOR DUMMIES. This allows you to search by call number for your ILLs and differentiate between ILLs and other brief records.

Delete ILL records

- When the ILL is returned, delete the record. To do this, use the Delete Title, Call Number or Items wizard on the Items toolbar in Circulation.
- If the wizard will not let you delete the entire title, right click on Delete Title, Call Numbers or Items and select Properties. On the behavior tab, check the box for “Delete title when deleting last call number or last item” and then click OK. You will not be able to remove the entire record, including title, call number, and item.

Appendix B – Cataloging Book Club Kits

Book kits should have their own record, separate from the record for the book itself. Kits can share the same bibliographic record regardless of individual library kit contents. Local information about specific kit contents can be entered in note fields at the item level.

To create a new book club kit:

If a record for the title already exists in the Shared Catalog, you can create a new duplicate record and modify that. If the Shared Catalog does not have a record for your kit's title, you will first need to import a record from OCLC.

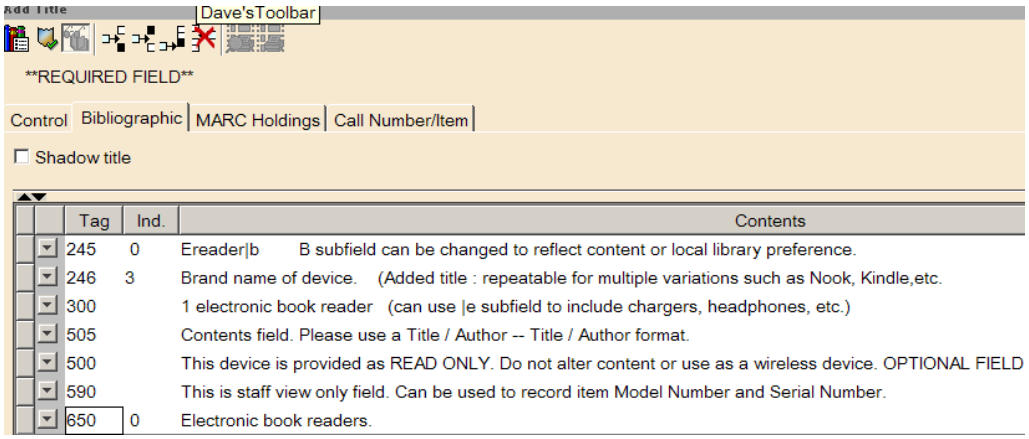
1. Select **Duplicate Title** wizard, located in the Title Maintenance toolbar in Cataloging.
2. Search for the title you wish to create a kit record for. Click **Duplicate**.
3. You will see the MARC record for the duplicated record. Please be sure to determine you are editing the *duplicate* record and not the original. Make the following changes to this record:
    a. Insert a GMD of [kit] in the title (245) tag.
    EXAMPLE:
    Three cups of tea|h[kit] :|bone man's mission to fight terrorism and build nations-- one school at a time /|cGreg Mortenson and David Oliver Relin.
    b. Leave the physical description (300) tag as it is.
    c. Add the following series tag: 490 _ 0 Book club kit
    d. Add the following subject tag: 653 _ _ Book group discussion kits.
    e. Delete OCLC tag (001).
    f. Delete OCLC tag (035).

4. Click **Save** when you are finished.
5. Add your call numbers and item(s).

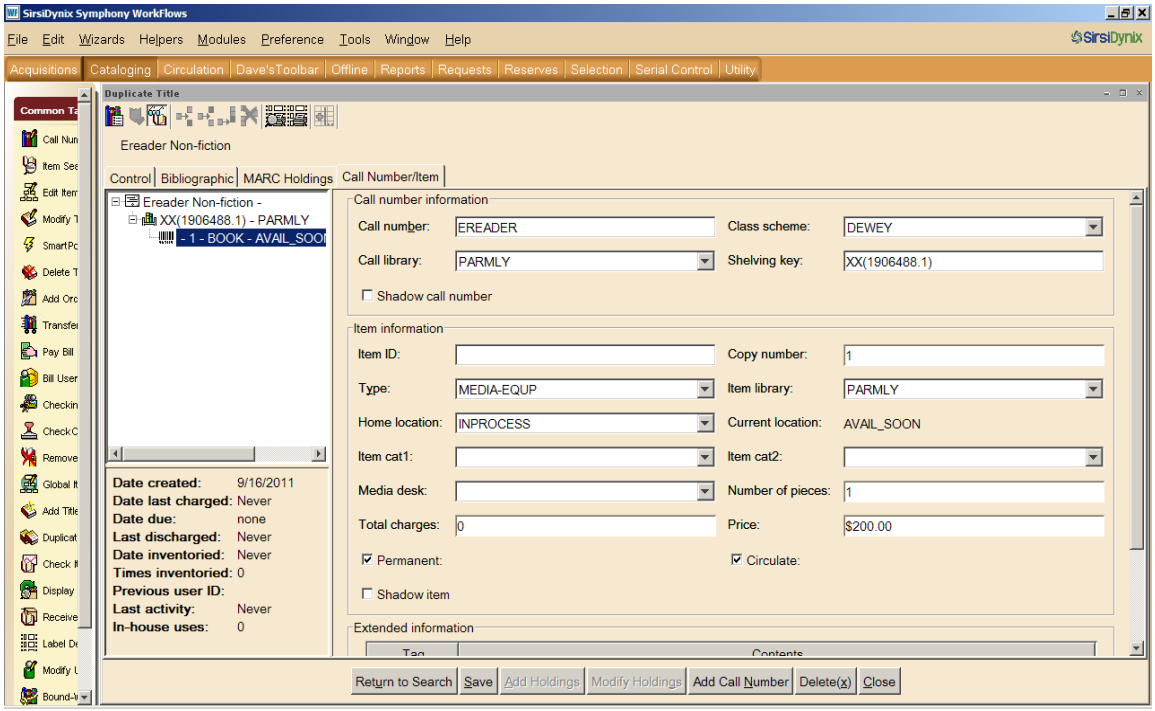
Appendix C – How to Catalog an eReader

TagInd.Contents

245 0 0 Ereader|b [B subfield can be changed to reflect content or local library preference]
246 3 _ Brand name of device. [Added title : repeatable for multiple variations such as Nook, Kindle,etc.]
300 _ _ 1 electronic book reader [can use |e subfield to include chargers, headphones, etc.]
505 0 _ Contents. [Please use a Title / Author -- Title / Author format.]
500 _ _ This device is provided as READ ONLY. Do not alter content or use as a wireless device.
590 _ _ [This is staff view only field. Can be used to record item Model Number and Serial Number.]
650 _ 0 Electronic book readers.



Item Type – use **MEDIA-EQUP**
Home location & Item cats – use local practices



Appendix D – MARC Tag Cheat Sheet

0XX Bibliographic control number and codes (including call numbers)

010 Library of Congress Catalog/Card Number
019 "Old" OCLC Number
020 ISBN
022 ISSN
050 Library of Congress Call Number
060 National Library of Medicine Call Number
082 Dewey Decimal Call Number

1XX Main Entry (Author)

100 Personal Name
110 Corporate Name
111 Conference/Meeting Name
130 Uniform Title

2XX Title and Title Paragraph

240 Uniform Title
245 Title Statement |a Personal Name |b Subtitle |c Statement of Responsibility
246 Varying Form of Title
250 Edition Statement
260 Publication, etc. |a Place of Publication |b Publisher Name |c Publication Date

3XX Physical Description

300 Physical Description
310 Current Publication Frequency
336 RDA Content Types
337 RDA Media Types
338 RDA Carrier Types
362 Dates of Publication and/or Sequential Designation

4XX Series Statement

490 Series Statement NOT as Added Entry

5XX Notes (Information that does not fit elsewhere)

500 General Note
505 Contents Note (titles of songs, table of contents, section names, etc.)
508 Creation/Production Credit Note
511 Participant or Performer Note
520 Summary Note
521 Target Audience Note (put Lexiles and suggested grade levels here)
526 Study Program Information Note (put AR reading levels here)
546 Language Note
586 Award Notes

6XX Subject Headings

600 Subject Added Entry—Personal Name
600 Subject Added Entry—Corporate Name
650 Subject Added Entry—Topical Term
651 Subject Added Entry—Geographic Name
655 Index Term—Genre/Form

7XX Added Entries

700 Added Personal Name
710 Corporate Body
740 Added Title
752 Hierarchal Place Name

8XX Holdings, Alternative Graphics, etc.

856 Electronic Location and Access (URL & FTP)

9XX Locally Defined Fields