Marc
Bibliographic
Cataloging
Guide
Created by Bib Core Group
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For other information see listings available on VALNEt Cataloging Web Page.
I. Mission Statement

The mission of the Catalogers is to provide timely and effective bibliographic control for materials acquired by the Libraries. We adhere to polices and procedures necessary to provide responsive, high quality patron access to an ever-growing array of materials. To this end, we endeavor to build strong partnerships within the consortium and to contribute with increasing effectiveness to local, regional, and international cataloging and preservations efforts.

II. Primary objectives:

- Create and edit bibliographic records for library materials in all formats in a timely manner
- Work cooperatively with all staff members both within the department or library and with VALNet and Win cataloging staff
- To correct errors and resolve problems in exiting records as they are found and to establish and utilize reporting system to identify errors and problems
- Oversee the integrity of the VALNet database
- Recognize and fulfill the need for training of new catalogers
- Provide mutual support to member libraries
- Members strive to keep up on changes in cataloging, classification and Tagging rules and procedures and to keep each other informed of these changes.

III. Goals

- Communication will be given high priority utilizing the Bib-Standards Contact (Appendix B.) list created on 4-29-02 to convey meeting information to those unable to attend.
- Read all documentation sent via e-mail or hardcopy and ask for help if it is not clear.
- Use Technology to its fullest
- Maintain a learning attitude
- Create benchmark set of standards for cataloging different formats of materials
IV. Membership

- Membership of this committee include catalogers from all VALNet Libraries. Each member library or group of libraries must appoint at least one representative to attend the Bib Standards Meetings.
- An email will be sent from the Chair of the Bib.Standards Committee (2) weeks prior to the meeting in September asking for a volunteer to be Chair for (1) one year.
- If no one volunteers to Chair, then at the September meeting nominations will be asked for and voted on by the quorum at this meeting. The new chair will reside over the next Bib. Standards Meeting.
- The past Chair if called upon may advise the current Chair.

V. Meetings

- The Bib-Standards committee will meet at least four times during the school year.
- A quorum shall consist of members present at a regularly scheduled meeting or any special meeting called in accordance with the bylaws.
I. Mission Statement

The Records Review/Core Group Committee is a standing subcommittee of the Bibliographic Standards Committee. Its purpose is to oversee, set and maintain standards for training of new catalogers.

II. Primary Objectives:

- This committee meets to review any records that may be referred to it by the larger committee. Any anomalies are discussed with the cataloger
- Create and maintain list of qualified persons to mentor new agencies. (Appendix A.)
- Study special and/or continuing topics of cataloging problems and decide the best course of action to present to the board and fellow catalogers

III. Goals:

- Research outside resources for training purposes
- Use our skilled catalogers to create in house training sessions.

IV. Membership:

- Starting October 2002 the committee will consist of (5) members.
- Members will be drawn from the catalogers who have full cataloging privileges
- All members who have full cataloging privilege will eventually serve on the committee
- An email will be sent from the Chair of the Records Review/Core Group Committee to the members (2) two weeks prior to the September meeting to see which members would like to rotate off of the committee
- An email will be sent to the Bib. Standards Committee members who hold full cataloging privileges (1) one week prior to the meeting in September asking for volunteers to fill the position(s) on the Records Review/Core Group Committee
- The current chair automatically rotates off of the Committee when the chair of the Bib. Standards Committee is voted into office
- Chair of Bib-Standards committee is also chair of the Records Review/Core Group Committee
- If there are no volunteers by the September meeting, nominations will be made and voted on by the quorum at that meeting. The new chair and members will reside over the next meeting.
- The past Chair if called upon may advise the current chair
V. Meetings

- The Records Review/Core Group will meet as the need arises
- A quorum shall consist of the members present at a regularly scheduled meeting or any special meeting called in accordance with the bylaws

Mentors/Cataloging
Created by Records Review/Core Group Committee
Dec. 4, 2001

<table>
<thead>
<tr>
<th>Basic</th>
<th>Original</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Agency</td>
</tr>
<tr>
<td>Ann Bezona</td>
<td>ACL</td>
</tr>
<tr>
<td>Marjean Riggers</td>
<td>ACL</td>
</tr>
<tr>
<td>Lori Bonner</td>
<td>CMP</td>
</tr>
<tr>
<td>Shannon Casteel</td>
<td>LCS</td>
</tr>
<tr>
<td>Sandy Tumelson</td>
<td>LDO</td>
</tr>
<tr>
<td>Peggy McElfish</td>
<td>LEW</td>
</tr>
<tr>
<td>Mary Ann Funk</td>
<td>LHS</td>
</tr>
<tr>
<td>Mary Ann Pavel</td>
<td>NEZ</td>
</tr>
<tr>
<td>Pat St. Tourangeau</td>
<td>KHS</td>
</tr>
<tr>
<td>Bonnie Holland</td>
<td>CHS</td>
</tr>
</tbody>
</table>
# Web Sites for Catalogers

## Web Sites that Offer MARC Records for Downloading

**Library of Congress**
Importing MARC records from the Library of Congress

**Bergen County Cooperative Library System**  is a great source for downloading MARC records.
Importing MARC records from Bergen County Library:

**Taylor Public Library** offers free MARC records with a download option.

**Arkansas State University** (search results provide you with a VIEW MARC option)

**Atlanta Metropolitan College** (click on "technical display" of search results)

**Fort Hays State University** (click on "MARC format" of search result)

**Kansas State University** (click on "MARC format" of search result)

**Endeavor Customer List**  is a good source for locating sites for downloading MARC records.

**Library of Congress MARC Home Page**
This site includes MARC Concise Formats, MARC field lists, MARC code lists, MARC documentation status, and MARC news.

**Library of Congress MARC 21 Concise Format for Bibliographic Data**
This document includes the content of the 1999 Edition, with Update No. 1 (October 2000) and Update No. 2 (October 2001) of the *MARC 21 Format for Bibliographic Data*.

**LiLI Libraries Linking Idado - Cataloging Section**
The cataloging section provides links to MARC education pages and free MARC record sources as well as a link to the LiLI-Z Pilot Project. Click on Cataloging in the navy colored navigation bar to access these resources.

**Understanding MARC Bibliographic: Machine Readable Cataloging**
This is a tutorial.
The **Catalogers Reference Shelf** has great information about understanding MARC records.

**Library of Congress Distribution Service**
This includes information on ordering MARC21 documentation and Cataloger's Desktop (software). This page also contains information on subscribing to Cataloging Service Bulletin, a quarterly containing changes and updates to MARC (ISSN 0160-8029).

**OCLC Bibliographic Formats and Standards**

**LISTSERV**

[autocat@listserv.acsu.buffalo.edu](mailto:autocat@listserv.acsu.buffalo.edu)
Send an email to this address with the text SUBSCRIBE and your full name
Useful on Line Catalog Websites for Catalogers
Created by Sandy Tumelson 9 8 03


http://gil.atlm.peachnet.edu/ Atlanta College: To download from here you must choose RAW MARC in the download dialog box and follow the same directions as from Library of Congress or BCCLS as the same as text box.

http://www2.lib.ksu.edu/cgi-bin/Pwebrecon.cgi?DB=local&PAGE=sbSearch Kansas State University: To download you must choose RAW MARC in the download dialog box and follow the same directions as from the Library of Congress or BCCLS.

Applying for your NUC: Organization Code from the Library of Congress
By Sandy Tumeloson 3 26 04

Instructions to check or apply for your Organization Code from the Library of Congress. (NUC code)
As I promised here are the instructions to check or apply for you Organization Code from the Library of Congress. These were the initials we entered in the 040 line, taking credit for our work, if we made drastic changes or created a new record from scratch.

Go to www.loc.gov/marc
On the left hand side below MARC code lists Organizations
That will take you to the Table of Contests
I would Search on line by code or name, first to make sure you do not already have a code assigned to your agency.
If no code go to How to Request.

It is really simple to do.

Also on this page you can go to the MARC Concise/Format /Bibliographic. This site is really a good one.
Logging into Cataloging
Sandy Tumelson and Shannon Casteel 9 08 2003

If you have a short cut to Cataloging on the desktop double click and open the application. If you do not have a short cut go to the start menu at the bottom of your screen. Choose Start- Select Programs – Select Voyager –Select Cataloging. (If you wanted to create a shortcut repeat the same steps and when you get to cataloging right click and choose Create Shortcut-select desktop.

The following dialog box appears. Enter your Operator Id and Password.

Select your cataloging location. Take special care to make sure you get the correct location. Hit OK.

You are now ready to start cataloging.
Logging into Cataloging
Sandy Tumelson and Shannon Casteel 9 08 2003

If you have a short cut to Cataloging on the desktop double click and open the application. If you do not have a short cut go to the start menu at the bottom of your screen. Choose Start- Select Programs - Select Voyager –Select Cataloging. (If you wanted to create a shortcut repeat the same steps and when you get to cataloging right click and choose Create Shortcut-select desktop.

The following dialog box appears. Enter your Operator Id and Password.

Select your cataloging location. Take special care to make sure you get the correct location. Hit OK.

You are now ready to start cataloging.
From the Menu bar, to the Options - Preferences
This example is one of LDO’s Elementary Schools General Preferences

Do not select OK yet. Click on the next tab (Validation)
Do Not check Bypass Marc Validation:
Explanation: Selecting means that the records you save to the database will not be validated against your MARC records.

Check Display all the headings

Check Bypass Authority Control Validations:
Explanation: We do not have an up to date authority file.

Click on the Work Flow Tab
Complete as Shown

Click on the Item defaults Tab
By using the drop-down arrows you select the item type of the item you are entering. You could enter this each morning if you wanted to.

Click on the Folder/File Tab
All of the areas will be blank with a new upgrade. To fill in the blanks Do.

From Templates
Bib: Click on the Ellipsis (3 dots…)

Character Set: (None)
This Screen will display because the system needs to find where the Bib Template is stored on the PC

Open the Catalog Folder.
Open the Template Folder
Click on the Bib.tem.file.

The system will automatically fill in:
File name: Bib
Files of type: (Template(*.tem)

Click on Open
The Bib Template is now filled in.
Click on Ellipsis in Templates: Hldg. Go through the same procedure
Click on Ellipsis in Template: Auth. Go through the same procedure.

All the Templates have now been filled in.

Click on the Mapping Tab
Mapping

This is the default screen.

No Changes are Needed

Click On OK.
Colors/Fonts

Be careful not to make the Font color and the Background color the same color. You won’t be able to see the Font, if it is the same color as the background.

The Font size needs to be at least a size 10 for clarity.

Click on OK.

End
<table>
<thead>
<tr>
<th>Function Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>F2</td>
<td>tag table</td>
</tr>
<tr>
<td>F3</td>
<td>insert line before</td>
</tr>
<tr>
<td>F4</td>
<td>insert line after</td>
</tr>
<tr>
<td>F9</td>
<td>insert a delimiter</td>
</tr>
<tr>
<td>[Ctrl] L</td>
<td>locations</td>
</tr>
</tbody>
</table>
What to look for when matching items to records!

Created by Shannon Casteel
Dec. 11, 2000

1) Tag 020 = ISBN numbers

2) Tag 100  = Authors name

3) Tag 245 = Title of book and inverted authors name/illustrator.

4) Tag 260 = Place of publication, publisher and copyright date(s).

5) Tag 300 = Page numbers, illustrations etc. and centimeters.

Also check for the Tag 010 = LCCN number. This is not as important as the above items to check.
Creating a copy of a record
Compiled by Shannon Casteel
Feb. 7, 2001

Choose the record you wish to make a copy of:
Go to the tool bar under record choose Make a Copy.
Click on **Make a Copy:** You now have the original Bib. Record and a **New Bib. Record (Copy)**
Close out the original Bib. Record by clicking on the X in the right hand corner of the record and edit the New Bib. Record:

Once you have edited the record save the Bib. Record by clicking on the sailboat on the tool bar. Then add your holding and item records.

-END-
Bib Records Must Include Data in the Following Fields in Order to Appear in the Patron OPAC
11-07-01 LB

Bibliographic records must include data in the following fields in order to appear in the patron OPAC. If the bibliographic record doesn't contain this information, the bib record must be suppressed from the database. Please see the Bib Standards meeting notes from 3-9-01, when this was voted on and approved.

http://www.lcsc.edu/library/valnetstaff/bib_standards_mtg_3-9-01.htm

020 ISBN, if available
100 Author
245 Title
260 Publisher, Publication Date
300 Physical Description
650 Subject Heading for Non-Fiction

To suppress a bib record, go to the "System" tab in the Bib record. Select "Suppress from OPAC." This will suppress the record from the patron OPAC. This is a toggle on/off option.

Bib records that do not meet the minimum requirements will be suppressed starting April 30, 2002. Catalogers have until this date to clean up their records.
The Following record is a bib record that had very little information to go on to catalog. Note [S.l.] is used when the location of publication is not none. [s.n] is used when the publisher is unknown.

If you are unsure of the dates:
[1994?] probable date
[19--?] probable century
[197-?] not sure of date

Also note the 008 field indicates a questionable date, and publication place unknown.

Other examples are BIB #’s 327063, 306675, 400092.
Creating hold and item records for Bib. Records
Information compiled by Shannon Casteel
10/30/00
UpDated 9/08/03

Search for the title of the book. In this example I used “Harry Potter and the chamber of secrets” Bib. #255608
As you can see there are many records for this title. Choose the one that matches your item. Highlight the title and then click on OK.
This brings up the Bib. Record for your book. To create a new holding record click on new Hldgs on the tool bar. To retrieve and work with a current holding record click on retrieve. The example on the next page is the holding record.
To create the new holdings click on new.
If there is a call number in the Bib. Record (082 or 092 for Dewey call numbers) it will come across to the new holding record. In this example a LC call number has been used. If there is not a call number in the Bib. Record you can fill it in after the #h. (Control N can be used to bring the call number from the Bib. Record if it doesn’t transfer automatically) Click on the sailboat in the tool bar to save the new holding record.
This is the new item record to be created and saved by the cataloger. Scan in the barcode, if item type is different from the default of book(hbnd) change this information, put in the price and statistical category. Save the item record when completed by clicking on the sailboat on the toolbar. An example follows on the next page.
Example of the item record. Each time you create a holding and item record it must be saved by – clicking on the Sailboat on the tool bar.
This item record has been saved.

-End-
If you have a title of a book and have multiple copies, you can create one Holdings record, and attach the Item records to that one Holdings record.

**Example:** Harry Potter and the Sorcerer’s Stone, Bib #255609

Search for the Bib record (Example: Bib #255609, Harry Potter and the Sorcerer’s Stone)

Check to see if there is a Holding record for your agency by clicking on Hierarchy or Get Hldgs

If there is no Holdings record for your agency, click on New Hldgs to create a new Holdings record. Complete the information necessary for the Holdings record, and Save to the Database.

In our first example we assume that your agency does not have a Holdings record.
Note **Hierarchy** and **Get Hldgs** from the menu bar.

In this example, CHS needs to attach a new Holdings to the Bib record.

Create a new Holdings record by clicking on **New Hldgs**, complete the information necessary for the Holdings record, and Save to the Database.
### MARC

#### Leader

```
Leader: 00071nx 22000374 4500
```

#### 005

```
005: ____________________________ 007
```

#### 008

```
008: 020613 4 u __ 8 1 001 u u __ 0 901128
```

### Tag H I2 Subfield Data

```
852 8  $b CHS $h Fiction
```
Create your first Item record for Copy 1 by clicking on **New Item**. Complete the information necessary for the Item record, and Save to the Database.
<table>
<thead>
<tr>
<th><strong>Title:</strong></th>
<th>Harry Potter and the sorcerer's stone / by J.K. Rowling; illustrations by Mary GrandPre.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Location:</strong></td>
<td>CHS</td>
</tr>
<tr>
<td><strong>Call #:</strong></td>
<td>Fc Row</td>
</tr>
<tr>
<td><strong>Barcode:</strong></td>
<td>3185354</td>
</tr>
<tr>
<td><strong>Perm. Loc.:</strong></td>
<td>CHS</td>
</tr>
<tr>
<td><strong>Item Type:</strong></td>
<td>Book(hbnd)</td>
</tr>
<tr>
<td><strong>Enum:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Chron:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Year:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Caption:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Free text:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Spine:</strong></td>
<td></td>
</tr>
</tbody>
</table>

| **Copy:**  | 1  |
| **Pieces:**  | 1  |
| **Price:**  | $20.00  |
If your agency receives a duplicate copy of a title that has been previously been entered in the VALNet catalog, search for the Bib record. Search by **Hierarchy** or **Get Hldgs** to retrieve the Holdings record for your agency. In this example, CHS needs to create a new Item record for a duplicate copy of the title. There is a Holdings record for CHS, #712520.
Select the Holdings record for your agency. Click on **Retrieve**. Create a new Item record to indicate the copy number, Copy 1, Copy 2, etc. In this example, the CHS Holdings was selected.
Click on New Item
Complete the Item information, and Save to the Database.
Click on **Hierarchy** from the menu bar.

There are two Holdings records for CHS, Copy 1 and Copy 2. Double-click on the line item to Retrieve the Holdings record.

This screen displays the Items attached to CHS Holdings record #712520.

Remember, our sole purpose for cataloging is to make it easy for our patrons to find records. This screen print shows how the Holdings display in the patron OPAC.
Status: Overdue - Due on 05-22-02

Database: VALNet
Location: CHS - Clarkston High School
Call Number: Fic Row
Number of Items: 2
Status: Not Charged

Database: VALNet
Location: CMP - Clearwater Memorial Public Library
Call Number: J ROWLING
Number of Items: 2
Status: Renewed - Due on 06-18-02
c.1 Charged - Due on 06-25-02

Database: VALNet
Location: CSD - Cuidesan School District
Call Number: [Fic] ROW
Number of Items: 1

-End-
Deleteing Duplicate/Inactive item barcodes
2 12 04 Sandy Tumelson

The following screen captures reflect the proper procedure for changing or deleteing a barcode number on an item. The reason we are addressing this is we seem to have a few duplicate items numbers in the data base. We thought we had them all corrected, but a few keep showing up. One agency scanned a book to check out, and 2 different titles came up with the same barcode. The agency had to delete their item barcode and reassign a new number. Occasionally when a new item record is entered it will scan incorrectly and add a digit or two or delete a digit or two. This procedure works for that too.

Bring up the item to be changed.

Click on the ellipses…..
Behind the barcode.

The following screen appears
The Barcode Status is Active

Enter your new Barcode Number. You might change this barcode when you purchased a new book for replacement that was identical. This would save you from entering a new holding and item screen.
It is Important to Delete the Inactive barcode. Any activity to that number could result in duplicate numbers.
Bib. record I want to delete. To do so I must retrieve the holding and item records. Deleting backwards item, holding and then the bib. record.
First retrieve the holding record by clicking on the first stack of books without the arrow and + sign in the toolbar.
Holding record to be deleted. Now retrieve the item record for this holding record.
Click on the active set of books not with the arrow and + sign. This will retrieve the item record to be deleted.
This is the item record to be deleted.
To delete the item record - click on record on the toolbar and then delete. This will delete the item record.
The system asks if you are sure you want to delete. Click on yes button. This deletes the item record and the holding record appears.
To delete the holding record click on record on the toolbar and then on delete.
The system asks if you are sure you want to delete the holding record. Click on the yes button and the holding record is deleted.
As with the item and holding record, click on record on the toolbar and then click delete.
Click on the yes button to delete the bib. record. You have successfully deleted the item, holding, and bib. record.
This would be any record that does not meet minimum marc standards, as set by VALNet. See "Bib Records Must Include Data in the Following Fields in Order to Appear in the Patron OPAC"

1. Keyword search, and limit by agency. Our example is LEW and Ladies Home Journal.
2. Scroll down to LEW
Click on Add
Click on Retain search limits between searches
Click on OK
3. Type in the title. Note: **Keyword, Free-Text, "ladies home journal"**

Click on **Do Search**

<table>
<thead>
<tr>
<th>Relevance</th>
<th>Title Long</th>
<th>Author</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>100 great appetizer and snack recipes / editor: Shelli McConnell.</td>
<td></td>
<td>1995</td>
</tr>
<tr>
<td></td>
<td>Ladies' home journal.</td>
<td></td>
<td>1999</td>
</tr>
<tr>
<td></td>
<td>Ladies' home journal : 2001/</td>
<td>LEW</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ladies' home journal : 1999 /</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ladies' home journal : 2000 /</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4. Records found: 5
5. Select **Ladies home journal: 2001**
Click on **OK**
6. View the record to determine if it is truly a brief record. This example, Bib 371419, is a brief record and needs to be suppressed.
Select the **System tab** in the Bib record.
Click on Suppress from OPAC. This action will suppress the record from the patron OPAC.

-End-
Relinking holdings
Compiled by S. Casteel
3/4/02
Updated 9/10/03

Your record of Spain Bib. Number 400961.
Get holding record.

Your holding record.
Relink with Bib. number 380986. Go to menu bar highlight record and scroll down to Relink holding to bib.
Put in the bib. number you want to relink to and then click on O:K.

Once you have clicked O:K make sure your holding is relinked to the correct Bib. record and then delete your record if there are no other holdings/items attached to it.

-End-
Find, download or create your bib record.
Note the 300 field indicates the 4 volumes and the 020 indicates as a set on this record.
This is a 4 volume set of Encyclopedias, that I want to be used for In Library Use only.
To create your holding for the new bib, select the pile of books at the top for New Holding.

852 tag. Enter your call number for the set at the #h (example REF 950 Env). I also entered ref behind (LHSref) as I do not want this reference book to circulate.

863 tag. Indicator 1 is (4) Indicator 2 is (0). v.1-v.4.

Save to the data base by sailing the ship.

You have now created your holding. We will create one holding and attach all four items to that one holding.
Click on New Item

Note the Perm Loc: has carried forward the LHS Reference Status from the holding screen.
You are now ready to start filling in the blanks for your Item records.
This window shows I have entered theBarcode, Changed the Item Type to Reference, Filled in the Enum. Completed the Pie Chart Status and entered the Price.
(The Enumeration text will show on the OPAC on the Patron Initiated Hold Screen.)
Save to the Data Base.
Close the New Item Screen, by using the x in the upper corner and your holding screen should still be there.
Now you select New Item Once again.
Again I will Fill in the Barcode, Item Type, Enum, Pie Chart and Price for this item.
This is my second item.

Save to the Data Base, Close the New Item Record Window.
Create a new item a 3\textsuperscript{rd} and 4\textsuperscript{th} Time using the same procedure.
If you do a Hierarchy check this is what you will see.

Note: One Bib - One Holding and 4 Items
This is how it appears to the public on the OPAC. Notice the location LHS-Library Use Only. That was generated from the item type reference. Also note the Library Has: That is generated by adding the 863 field to the holding.

END
OPAC multi-volume record before relinking. There are 8 separate holdings for two different agencies.
Search for your multi-volume set in cataloging module to retrieve your Bib. record.

The holding record we are going to work with is the LHS Reference. Each agency needs to determine how they will create their holdings following the standards. See Appendix A. What ever is entered in the holding appears on the OPAC (Patron Catalog).

See World Book Encyclopedia Bib. # 332839 in the cataloging module and in the OPAC.

One 863 tag, first indicator (4) second indicator (0) is used.
Create a new holding record. Note new holding record number 758798 (a good practice is to write this number down). One 863 tag has been added, you will relink the 4 items to this new holding record. Delete the old holdings as you relink each item.

Minimize the new holding record. Highlight and retrieve only the 4 original LHS holding records.

<table>
<thead>
<tr>
<th>ID</th>
<th>Location</th>
<th>Call Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>758798</td>
<td>LHS Reference</td>
<td>REF 940.53 ENC</td>
</tr>
<tr>
<td>585502</td>
<td>LHS Reference</td>
<td>REF 940.53 ENCV.1 A-D</td>
</tr>
<tr>
<td>585504</td>
<td>LHS Reference</td>
<td>REF 940.53 ENCV.2 E-K</td>
</tr>
<tr>
<td>585506</td>
<td>LHS Reference</td>
<td>REF 940.53 ENCV.3 L-R</td>
</tr>
<tr>
<td>585508</td>
<td>LHS Reference</td>
<td>REF 940.53 ENCV.4 S-Z</td>
</tr>
<tr>
<td>585553</td>
<td>WWC</td>
<td>Ref D804.3 .E531990 v.</td>
</tr>
<tr>
<td>585585</td>
<td>WWC</td>
<td>Ref D804.3 .E531990 v.</td>
</tr>
<tr>
<td>585587</td>
<td>WWC</td>
<td>Ref D804.3 .E531990 v.</td>
</tr>
<tr>
<td>585589</td>
<td>WWC Reference</td>
<td>Ref D804.3 .E531990 v.</td>
</tr>
</tbody>
</table>
Note the order in which they cascade on the screen. The holding records appear backwards. Also note the new holding record minimized in the lower left hand corner.

Click on the first holding record number 585582, which is in the back and is the first holding record A-D.
Retrieve the item record for this holding by clicking on **Get Items**.

Type information in the holding record v.1 A-D in the Enumeration line and save to the database. If you have a year put the date in the Year line. This information is important as it appears in the OPAC when the patron places a hold for the item. From Bib. record to Bib. record this information could and will change. Anything entered in the Free Text line will appear in the OPAC. Remember to keep it brief and only information you want the patrons to see.
You are now ready to start relinking the items. Go up to **Record** in the upper left hand corner. Pull down and select **Relink to a different holding**. A dialog box will appear in the middle of the screen. Type in the new number of the holding record you want to relink the item too. Click on **OK**.

The item is now relinked to the new holding record. The system will give you a message that the relink was successful. Note the holding number for the item has changed to the new holding number.

Close the item record. Delete the holding record before moving on to the next relink. Now there are only three holding records remaining. Remember to work back to front. Click on the back record again and repeat the process until all of the items are relinked and the holdings are deleted.
Restore the holding record that was minimized. Now there is only one holding for LHS. This is the new holding record we created with the 863 tag.

You can check your work by clicking on **Get Items**. Another method of checking is to click on the **Hierarchy**.
Look on the OPAC to see how it appears. This will show up any mistakes that you have made during relinking.

This is the result on the OPAC.

Now there is one entry for LHS. This shortens the display in the OPAC. Note the Number of Items, Status, and Library Has.
For the agency that chooses to do multiple 863’s this is an example of how it will appear in the cataloging module.

This is how it will appear on the OPAC.

In the Library Has the volume numbers and letters appear in the OPAC.
Appendix A
Examples of Variations
863 Field
By Shannon Casteel – Sandy Tumelson
January 29, 2003

Volume to Present
863 4 0 #a v.1 – Present

Dead End Run Volume to Present
863 4 0 #a v.1 – v.999

Volume to Present (Microfiche)
863 4 0 #a v.1 – Present (Fiche)

Volume to Present (Paper)
863 4 0 #a 1992 – Present (Paper)

Year to Present
863 4 0 #a 1910 – Present

Dead End Run Year to Year
863 4 0 #a 1910 – 1927

Year to Present (Microfiche)
863 4 0 #a 1992 – Present (Fiche)

Year to Present (Paper)
863 4 0 #a 1992 – Present (Paper)

Dead End Run Year to Year (Microfiche)
863 4 0 #a 1910 – 1927 (Fiche)

Dead End Run Year to Year (Paper)
863 4 0 #a 1910 – 1927 (Paper)
**Year to Present with copies in Reference and General Collection**
852 does not indicate that the current issue is in Reference (you can make the item a ref. in the item record by using Item Type).

852 0  #b LCS #h AY67.N5 #I T54  
863 4 0 #a 1999 – Present  
863 4 0 #a Current issue shelved in Reference  
863 4 0 #a Others shelved in general collection

**Year to Present with copies at Reference Desk and General Collection**
852 does not indicate that the current issue is in Reference (you can make the item a ref. in the item record by using Item Type).

852 0  #b LCS #h AY67.N5 #I W7  
863 4 0 #a 1935 – Present  
863 4 0 #a Current issues shelved at Reference Desk  
863 4 0 #a Other issues in general collection

**Only current issue kept**

863 4 0 #a Current issue shelved in Reference

**Number to Present**

863 4 0 #a no.1 - Present

**Number to Present (Microfiche)**

863 4 0 #a no.1 – Present (Fiche)

**Number to Present (Paper)**

863 4 0 #a no.1 – Present (Paper)

**Number to Present (Paper and Microfiche)**

863 4 0 #a no.1 – no.30 (Paper)  
863 4 0 #a no.31 – Present (Fiche)

-End-
Definition: **Serial:** A publication in any medium issued in successive parts bearing numeric or chronological designations and intended to be continued indefinitely. Serial include periodicals; newspapers; annuals (reports, yearbooks, etc.); the journals, memoirs, proceedings, transactions, etc., of societies; and numbered monographic series.
### 008 Fixed Field

**Publication Status of a serial still in publication**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Publication Status</td>
<td>c: Serial item currently published</td>
</tr>
<tr>
<td>Date 1 (yyyy)</td>
<td>1991</td>
</tr>
<tr>
<td>Date 2 (yyyy)</td>
<td>3933</td>
</tr>
<tr>
<td>Place of Publication</td>
<td>nyu: New York (State)</td>
</tr>
<tr>
<td>Frequency</td>
<td>a: Annual</td>
</tr>
<tr>
<td>Regularity</td>
<td>r: Regular</td>
</tr>
<tr>
<td>ISSN Center</td>
<td>_: No ISSN center code assigned</td>
</tr>
<tr>
<td>Type of Serial</td>
<td>_: None of the following</td>
</tr>
<tr>
<td>Original Item</td>
<td>_: None of the following</td>
</tr>
<tr>
<td>Form of Item</td>
<td>_: None of the following</td>
</tr>
<tr>
<td>Nature of Entire Work</td>
<td>_: No attempt to code</td>
</tr>
<tr>
<td>Nature of Contents 1</td>
<td>_: Not specified</td>
</tr>
<tr>
<td>Nature of Contents 2</td>
<td>_: Not specified</td>
</tr>
<tr>
<td>Nature of Contents 3</td>
<td>_: Not specified</td>
</tr>
<tr>
<td>Govt. Publication</td>
<td>_: Not a government publication</td>
</tr>
<tr>
<td>Conf. Publication</td>
<td>_: Not a conference publication</td>
</tr>
<tr>
<td>Alphabet</td>
<td>a: Basic Roman</td>
</tr>
<tr>
<td>Type of Entry</td>
<td>b: Successive only</td>
</tr>
</tbody>
</table>

**Note frequency**
Example of a serial bib record with some explanations

022 field
The ISSN number 4 digits-4 digits should be unique and should remain the same year after year (4444-4444) This is entered in the 022 field

Dates of publication 260: Dates of publication of a serial are the dates of the first issue to date of last issue, until the serial ceases. Date is left open if the serial has not ceased. e.g. 1985- If you are not cataloging from first issue also use square brackets for the date. [1985]-

362 Field: Guidelines: If you have the first or last issue of a serial, use a formatted 362 field Indicator 0.

OCLC: Do Not guess at designations, use true beginning and ending number/dates from first and last issues. (If not know, use NO 362)

500 Notes:
Most serial records have one or more notes including: examples
Frequency (if it is not clear from the title)
Changes in physical format or publication details
The issue on which the description is based (if the first issue is not available)

Record could also contain 020 and 010 fields.

Note record number 30683.
A Holdings record and an Item record for each new issue will need to be created. See example

-End-
Video Record Example
Created by Sandy Tumelson 10/14/2002

Video Record fields to check and complete. If these fields are not complete or left blank the record is not searchable in the OPAC.

1. Leader
2. 007 Physical Description (v-Video recording)
3. 008 General Description (Visual)
Leader Line: Note Type of Record (g: projected medium)