



Best Practices for Cataloging



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Best Practices for Cataloging

1 Shared catalog

These bibliographic records are the shared property of the consortium regardless of the number of holdings attached. It does not matter which library created the record, who transferred it into the database, or who has edited it since. If you find a mistake in the bibliographic record, you are responsible for correcting it.

If you see a needed correction on another library's item and need confirmation of something having to do with the item (a large print book on a regular print book record, for example), contact the other library. You can find the cataloging contact information for all other libraries at <http://moevergreenlibraries.org/cataloging/>

2 Bibliographic Records

2.1 040/049/902

Create an 049 and put your library's code in it if you created or imported the bib record. Do not use it otherwise. The code will be your 3-character OCLC code followed by the letter A.

Example:

=049 \\\$aMZ7A

Add your library's code in the 040 if you have edited the record.

Example:

=040 \\\$aTEFMT\$beng\$serda\$cTEFMT\$dOCLCO\$dTEF\$dTEFMT\$dOCLCF\$dIEP\$dCLD\$dMZ7A

Create a 902 if you have overlaid a record or have merged records. If adding a 902, you should also be adding a new \$d to the 040 field. The format should be:

=902 \\\$aLibrary code\$bDate\$cAction

Example:

=902 \\\$aMZ7A\$b05/28/21\$cMerged

2.2 Importing Bib Records

2.2.1 Using Z39.50

The Z39.50 protocol allows a cataloger to search external sources for MARC records, such as OCLC or the Library of Congress, as well as searching the Missouri Evergreen catalog.

Query Default	Field	Value	Service and Credentials
<input type="radio"/>	Author		<input checked="" type="checkbox"/> Local Catalog
<input type="radio"/>	ISBN		<input type="checkbox"/> First Search Username
<input type="radio"/>	ISSN		
<input type="radio"/>	Item Type	All Formats	<input checked="" type="checkbox"/> Library of Congress
<input type="radio"/>	Keyword		<input type="checkbox"/> Mainecat
<input type="radio"/>	LCCN		<input type="checkbox"/> MELCAT
<input type="radio"/>	Pub Date		<input type="checkbox"/> minerva.maine.edu
<input type="radio"/>	Publisher		<input checked="" type="checkbox"/> OCLC Username
<input type="radio"/>	Subject		
<input type="radio"/>	TCN		<input type="checkbox"/> Ohiolink
<input type="radio"/>	Title		<input type="checkbox"/> San Francisco Public
<input type="radio"/>	UPC		<input type="checkbox"/> SKYRV
			<input type="checkbox"/> St. Louis County
			<input type="checkbox"/> Tulsa City-County
			<input type="button" value="Save as Default"/>

Username: Password:

Open Z39.50 by selecting Cataloging Menu—Import Record from Z39.50.

Services and Credentials

The upper right side of the screen is the Services and Credentials area. It lists the services you can search for records and allows you to enter your username and password for services that require that information. Check as many services as you want to search simultaneously. However, the more you check, the slower the search. Always include Local Catalog in your search. The Save as Default button will save the services checked and username/password information for future use.

You can only use the OCLC and Firstsearch service if you subscribe to the full service OCLC, which is separate from Missouri Evergreen.

Query (Search)

On the upper left of the screen is the Query area. After choosing the services to search, you will see a list of fields into which you can enter your search criteria. If you need to clear the search form of all entered terms, click on the Clear Form button. When you have entered the desired search criteria, click the Search button.

Results

Once you have done your search, the results will display in the lower section of the screen.

You can take a variety of actions from the Results area.

If one or more of the results shows native-evergreen in the Service column, this item already has a bibliographic record in Missouri Evergreen.

- Highlight the record, click Show in Catalog, then view and examine the record for record quality.
- If it is a good quality record, go to Holdings Maintenance.
- Add your volume and item record (see Creating and Adding Item Records to Bib Record) to the already existing bib record.

2.2.1.1 Overlaying better records on incomplete records

If the record is not good/complete and one of the results in the Z39.50 search is better, you can import and overlay the record onto the existing record.

- To overlay the record, highlight the local result line.
- Click on the Mark Local Result as Overlay Target

#	Service	TCN	ISBN	Author	Title	Publisher	Publication	Edition
1	native...	1260994	9780738734873	Boneha...	The money bird	2013	First ed...	
2	loc	17711131	9780738734873 (...)	Boneha...	The money bird	2013	First ed...	

Overlay record?

Choose merge profile: [dropdown] Edit Z39.50 Record

Replace TCN 3447649 ...

With this?

[List of records]

Overlay Cancel

button.

- Highlight the record that you want to overlay on top of the bad record.
- Click on Overlay.
- A window will pop with both records. The current record will be on the left. The new record will be on the right.
- To continue, click on the blue Overlay button at the bottom right. To cancel, click on the yellow cancel button at the bottom right.

[Place Hold](#)
[Add Holdings](#)
[Series](#)
[Mark For...](#)
[Other Actions](#)

[Item Table](#)
[MARC Edit](#)
[MARC View](#)
[View Holds](#)
[Monograph Parts](#)
[Holdings View](#)
[Conjoined Items](#)
[Shelf Browse](#)

[Patron View](#)

☐ Add Item
 [Record Type BKS](#)

[Save Changes](#)
[Delete Record](#)


[Enhanced MARC Editor](#)
[Flat Text Editor](#)

```

=>LDR 01319cam a2200361 i 4500
=>001 1260994
=>003 ME
=>005 20140604160516.0
    
```

2.2.1.2 Importing a New MARC Record

If there is no existing bibliographic record in Missouri Evergreen, you can import a new record from the search results on the Z39.50 page.

- After looking at the records with View MARC or Edit then Import, decide which record to import.
 - Select the record, then click the Edit then Import button. The MARC Editor will open.
 - Make any necessary changes/additions to the Bibliographic record.
- 
- The screenshot shows a dialog box titled "Import Record" with a "Yes" button and a "No" button. The "Yes" button is highlighted in blue.

NOTE: Because bibliographic records are shared by all Missouri Evergreen libraries, MARC records should not contain local information. That information should be contained in the item information.

[illegible]

- When you have finished editing the MARC record, click the Import Record button at the top of the screen.

A pop-up window will appear, letting you know the record imported successfully.

If you have overlayed or imported the record, a new tab will automatically display the record in your default view.

2.2.1.3 OCLC Records

Importing records from OCLC

You can only use the OCLC service if you subscribe to the full service OCLC.

Because OCLC has more ways of searching, sometimes it is easier to search for a record in OCLC, then import the record in Z39.50 in Evergreen. When this is the case, once you find the record in OCLC, you can use the OCLC number to pull it into Evergreen using Z39.50 Import.

- Find the record in OCLC.
- Copy the OCLC number
- Open Z39.50 Import in Evergreen
- Paste the OCLC number into the search screen in the TCN line.
- Click on Search

2.2.2 Batch Importing MARC Records

If you have a file of multiple bibliographic records, it is much more efficient to upload them all at once using MARC Batch Import. Though optional, you can also add an 852 field which will add a holding(s) to the bib record when uploaded. Details on how to do this are in 2.2.3.

- Go to Cataloging--MARC Batch Import/Export. The Import tab will open, showing the MARC File Upload form that will be filled out. Fill out the fields as follows.
- Record Type: Bibliographic Records
- Select or Create a Queue: Name your upload list
- Record Match Set: There are several to choose from, but the most commonly used one is "ISBN and Title."
- Holdings Import Profile: Evergreen 852 export format
- Merge Profile: Match-Only Merge
- Insufficient Quality Fall-Through Profile: Leave blank
- Best/Single Match Minimum Quality Ratio: 0
- Optional Session Name: Leave blank
- Remove MARC Field Groups: Leave blank
- File to Upload: Locate and select the .mrc file you have saved to your computer
- Select a Record Source: oclc (even if they're not from OCLC)
- Limit Matches to Bucket: Leave blank
- Import Non-Matching Records: CHECKMARK
- Merge On Exact Match (901c): BLANK
- Merge On Single Match: BLANK
- Merge on Best Match: CHECKMARK
- Auto-overlay In-process Acquisitions Items: BLANK
- Auto-overlay On-order Cataloging Items: BLANK
- Use Org Unit Matching in Copy to Determine Best Match: CHECKMARK

The screenshot shows the 'MARC Batch Import/Export' interface with the 'Import' tab selected. The form is divided into several sections with dropdown menus and checkboxes. The 'Record Type' is set to 'Bibliographic Records'. The 'Select or Create a Queue' dropdown is empty. The 'Record Match Set' is set to 'Match Set...'. The 'Holdings Import Profile' is set to 'Holdings Import Profile...'. The 'Merge Profile' is set to 'Merge Profile...'. The 'Insufficient Quality Fall-Through Profile' is set to 'Fall-Through Merge Profile...'. The 'Best/Single Match Minimum Quality Ratio' is set to '0'. The 'Optional Session Name' is set to 'Session Name...'. The 'Remove MARC Field Groups' is set to 'Basic JCLBasic'. The 'File to Upload' section has a 'Browse...' button and the text 'No file selected.'. The 'Upload' button is green and located at the bottom right.

To save this as a template to use again, click on the "Save As New Template" button. You may want to have the "Select or Create a Queue" and "File to Upload" fields empty when saving the template the initial time.

- Click the green "Upload" button.

Once the file has finished Importing and Uploading, click the blue "Go To Queue" button. In the next screen, check the Queue Summary in the upper left side and make sure all records imported and none failed.

2.2.3 Adding an 852 field to batch load file

Adding an 852 field to your batch of bibliographic records will add a holding to your records at time of import. This is not required to do before uploading bib records, but is recommended. Using a free software, Terry Reese's [MarcEdit](#), this can be done relatively quickly. If you do not wish to include barcodes in your 852, be sure to turn on the "Vandelay Generate Default Barcodes" library setting.

- Open MarcEdit, then open the MarcEditor.
- File>Open (or use file open icon)
- Choose your file (if the bibs came in a .mrk file, you will need to rename the file to a .mrc file)
- Your screen will populate with the MARCs, in a simple notepad-type document.
- Tools>Add/Delete Field (or press F7)
- In the Add/Delete Field Utility screen, use the following information to fill the form.
 - Field: 852
 - Field Data: \\\$bLIBRARY SHORT CODE\$cItem location\$gCirculation Modifier\$jCALL NUMBER\$zOn Order
 - \\\$bJCL-ARN\$cBest Seller\$gBooks\$jF\$zOn Order
 - The data MUST be built EXACTLY like above for it to work. There can be no typos in the short code, location, circ mod, and the \$z field must be exactly as shown, with each word capitalized and one space in between.
- Click Add Field
- You will see that 852 field added to all the bibliographic records in the file
- If you notice a typo after the field has been added, you can go to Edit>Special Undo, and it will un-add the 852 fields
 - Special Undo only works if you haven't done any editing of the bibs since adding the fields.

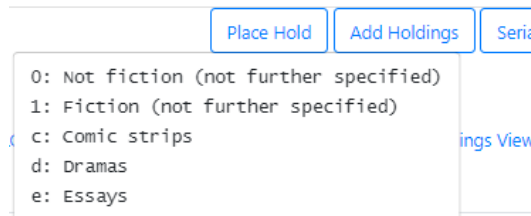
2.3 Editing MARC Bib Records

Follow Evergreen cataloging policies and procedures, along with national standards for decisions on editing information in the MARC record. To edit an existing record in Evergreen, simply open the record and navigate to the MARC Edit tab.

2.3.1 Editing the fixed fields (LDR & 008 Fields)

Under the MARC Edit tab, click on the Enhanced MARC Editor sub-tab.

The Enhanced MARC Editor can provide suggested values in selected fields. In many of the fixed fields, users can right-click to see the options for valid characters and their values.

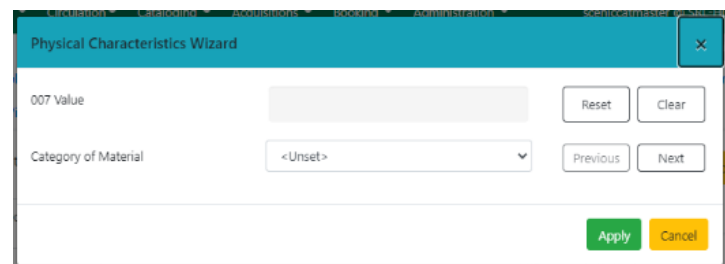
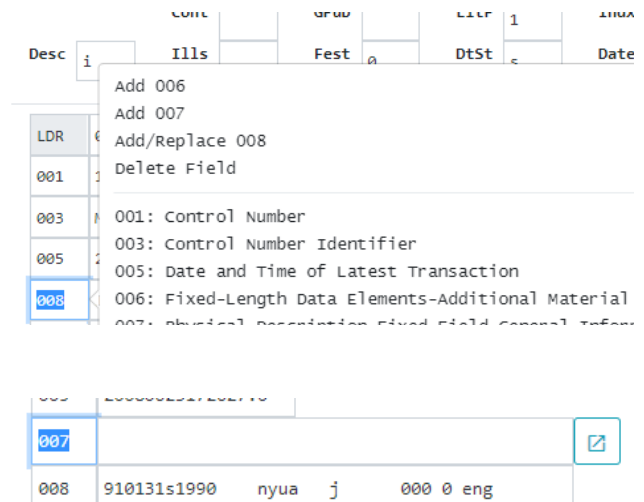


MARC Editor users retain the option of leaving the fixed field value blank or entering special values (such as # or |).

2.3.2 Adding & Editing 007 field (Physical Characteristics Wizard)

If you need to add an 007 field, click on the tab for Enhanced Marc Editor.

- Place your cursor in one of the boxes for the MARC tags number designation. Right click and choose Add 007.
- Click on link at end of 007 field. This will open the Physical Characteristics Wizard.
- Click on the drop down on the lower half of the box. Choose the appropriate option and click next. Continue until “Next” is grayed out. Click on Apply.

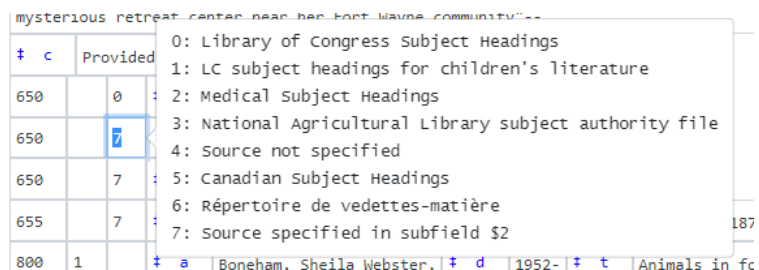


You can also use the Physical characteristics wizard to edit existing 007 fields.

2.3.3 Editing the variable fields

In the Enhanced MARC Editor, right clicking MARC tag number designation boxes (except the LDR) brings up a list of MARC tags with descriptions. Scrolling down in the dialog box brings up a list of field tags you can insert or replace. If you click on one it will be put in the line your cursor is in. If you want the tag to be added not replacing a current tag, then insert a new line and place your cursor in that field.

Right clicking in the indicator data entry boxes provides you with a list of values specific to that field and a description. Clicking on the value inserts or replaces it in the data box. You can also enter a value directly.



Right clicking after the subfield delimiter sign provides you with a list of subfield letter values specific to that field and a description. Scroll up or down to find the correct value or enter it directly.

You can copy, cut, and paste from other applications or from within Evergreen into the Flat Text Editor.

2.3.4 Saving edits and the record

In order to apply edits or changes to the record in the Evergreen database, the record must be saved.

Click on the Save Changes button underneath the Record Summary.

You may wish to display the record in the Patron view to verify changes.

If you have overlayed or imported the record, a new tab will automatically display the record in your default view. If you are editing an existing MARC record, most changes will not be visible until you have refreshed the page.

2.4 Local Information on bib records

Information specific to any particular library should not be on a bib record. Examples of this include library specific subject headings and information about donors or memorials. Sometimes records that are imported have this type of information on them. That information should be removed. Local information can be recorded in digital bookplates, item notes, or stat cats.

2.5 Deleting bib records

A record can only be deleted if there are no items or call numbers attached to it in the database. Additionally, Missouri Evergreen is configured to delete a MARC record once all items and call numbers attached to it are deleted.

However, there are situations where a bibliographic record that has no items attached may need to be deleted. For example, the wrong record is imported. The correct record can be overlaid on the wrong record or incorrect record can be deleted.

To delete a bib record:

- Bring up the record in the database.
- Click on the Marc Edit tab
- Click on the yellow Delete Record button
- You will be asked to confirm the action. Click the OK/Continue button.
- The record will redisplay with a note at the Record Summary that it is deleted.

Record Summary (Deleted)	
	Title: Love for Beginners
	Author: Shalvis, Jill
	Bib Call #: 813

Note: A deleted record is now deleted and inactive and only retrievable by a TCN (title control number) or bibliographic record id search.

2.6 Undeleting bib records

Records deleted in the database are not really deleted. They are marked with a tag that makes it unsearchable except by title control number or Bib ID. If you mistakenly delete a bib record, you can restore it with the steps below, but only if you know the TCN.

- Retrieve the record by TCN
- Navigate to the MARC Edit tab
- Click on the Undelete button

The screenshot shows the 'MARC Edit' tab in a library cataloging system. The 'Record Type' is set to 'VIS'. The 'Undelete Record' button is highlighted in blue. Other visible fields include 'Type' (g), 'ELv1' (M), 'Audn' (e), 'Ctr1', 'Lang' (eng), 'Help', 'BLv1' (m), 'Form', 'MRec', 'Ctry' (xxu), and 'Validate'.

2.7 Creating new bib records

See Appendix for guidelines for altering an existing imported bib record from one format to another (i.e. regular print to large print, or print to audio book) when you can't find a match.

- After determining that there is no available record in Evergreen or Z39.50 sources, access MARC templates under the Cataloging menu and select Create New MARC Record
- Click on the dropdown menu and select the appropriate format
- Click the Load button

The screenshot shows the 'Cataloging' menu in a library cataloging system. The 'Create New MARC Record' option is highlighted. Other visible options include 'Search the Catalog', 'Search the Catalog (Traditional)', 'Item Status', 'Record Buckets', 'Item Buckets', 'Retrieve Bib Record by ID', 'Retrieve Bib Record by TCN', 'Retrieve Last Bib Record', and 'Import Record from Z39.50'.

Note: you can select a workstation default here. Choose a template, then click on Set Workstation Default

- A blank MARC record will load, which will include some of the appropriate MARC fields, some of which will be

The screenshot shows the 'Select MARC template' dropdown menu in a library cataloging system. The 'book' option is selected. Other visible options include 'audiobook', 'blu_ray', 'dvd', 'ereader', 'k_audio', 'k_book', 'k_video', 'large_print', and 'magazine'. The 'Load' button is visible next to the dropdown.

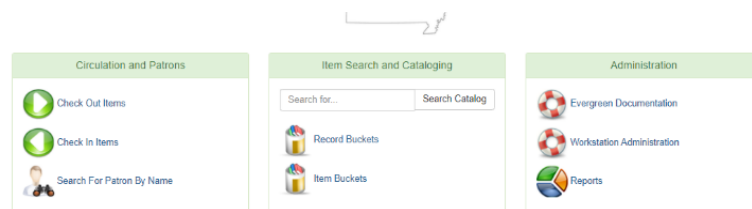
pre-filled with common values

- Complete the MARC record. Refer to Missouri Evergreen Cataloging Training Manual.
- Once finished, be sure to click the Save button

2.8 Records Buckets and Merging Bib Records

2.8.1 Record bucket basics

Record buckets are used to merge and delete bibliographic records. The Record Bucket interface is accessed from the Cataloging menu with the Record Buckets option, or from the homepage.

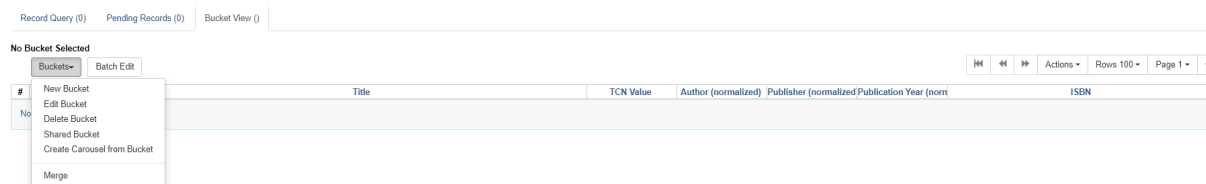


Record Query

The Record Query tab opens an interface that allows you to search the database and add records to buckets. Once you have searched, you can add all or selected records to Pending or to a Bucket. Alternatively you can add records to a bucket directly from the record page or through the baskets feature.

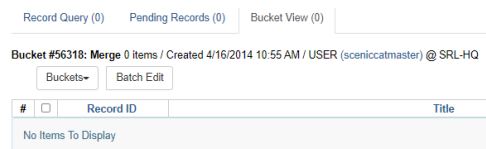
Bucket View

Choose an existing bucket under the Buckets drop-down menu.



The Buckets button houses the New Bucket, Edit Bucket, Delete Bucket, Shared Bucket, and Create Carousel.

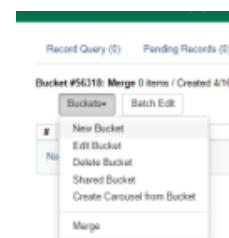
A count of records is displayed in parentheses for each tab. These indicate the number of records that appear in your query, are pending, or have been successfully added to the selected bucket. The bucket number, title, creation time, and owner are immediately above the Buckets button.



2.8.2 Creating Record Buckets

Record buckets are used with bibliographic records. Item buckets are used with items. You cannot add items to bibliographic record buckets and vice versa.

There are four ways to create a bucket:



1. Create a bucket in Record Bucket, Bucket View
2. Retrieve a record and create a bucket from the record
3. Create a record bucket from a basket of bib records
4. Create a record bucket from a list of items in Item Status

To create a Record Bucket in from the Bucket View page:

- Access Record Buckets using one of the methods [2.8.1 Record Bucket Basics](#)
- In Bucket View, click on the drop down menu in Buckets. Click on New Buckets
- In the window that pops up, name the bucket and click OK.

The Bucket View has changed to display your new bucket as the active bucket and a bucket number is assigned. This bucket and all others created by the same user are available in the Buckets dropdown menu.

To create a bucket from a record:

- Open the record you want to put in a bucket.
- Choose Other Actions for this Record—Add to Bucket.

- Choose the New Bucket tab
- Name the bucket and click OK.

The results are the same as creating a bucket using the steps above, with the difference being the new bucket created on the fly now has a record in it.

To create a record bucket from a basket of bib records:

- Search for and create a basket of items.
- Go to basket actions and choose Add Basket to Bucket
- Name the bucket and click OK.

The bucket will have the records from your basket in it.

To create new bucket from Item Status

- Put items in Item Status. Then Select records that you want to add to a Record Bucket. Bib Records attached to items will be added to the Record Bucket.
- Under Actions, select Add to Record Bucket

A window will open. To create a new bucket, enter a name in the box Name for New Bucket. Click on Add to New Bucket.

2.8.3 Adding records to record buckets

There are four ways to add records to a record bucket:

1. Search Query in Record Bucket
2. Retrieve a record and add to a bucket
3. Add a basket of bib records to a bucket
4. Add a list of items in Item Status to a bucket

Adding records through Search Query in the Record Bucket

- Go into Record Buckets
- Click on the Buckets button in the Bucket View tab and select a bucket.
- Click on the Record Query tab.
- In the Query space enter search terms (such as the title and author or ISBN) then click on Submit.

Record Query (40) Pending Records (0) Bucket View (0)

Bucket #710354: Test 0 items / Created 5/20/2021 11:10 AM / USER (sceniccatmaster) @ SRL-HQ

Record Query harry potter and the goblet of fire rowling

Buckets Batch Edit

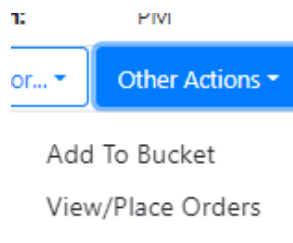
#	<input type="checkbox"/>	Record ID	Title	TCN Value	Author (noPu
1	<input type="checkbox"/>	341046	harry potter and the order of the phoenix	341046	rowling... lis
2	<input type="checkbox"/>	452900	harry potter and the order of the phoenix	452900	rowling... lis
3	<input type="checkbox"/>	600141	Conversations with J.K. Rowling	600141	Fraser, ...
4	<input type="checkbox"/>	915789	lego harry potter years 1-4	915789	di
5	<input type="checkbox"/>	1103658	Harry Potter and the goblet of fire	1103658	Rowling...
6	<input type="checkbox"/>	1282190	Triumph of the imagination : the story of w...	1282190	Chippe...
7	<input type="checkbox"/>	1296627	Harry Potter : y la orden del Fénix	1296627	Rowling...

- Look at the results of the search (you can sort them by any of the columns and you can add more information with the column picker).
- Select the ones you want to add to the bucket. In the Actions Menu, Choose Add to Bucket.

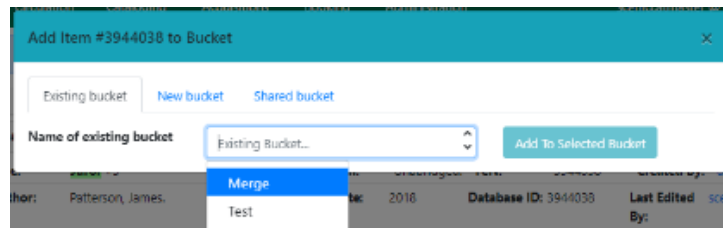
Buckets		Batch Edit				Actions	Rows
#	Record ID	Title	TCN Value	Author (no Publish			
1	<input type="checkbox"/> 600141	Conversations with J.K. Rowling	600141	Fraser, ...		Add To Pending	3N
2	<input type="checkbox"/> 3550285	Harry Potter : complete 8-film collection	3550285			Add To Bucket	9314558
3	<input type="checkbox"/> 1296627	Harry Potter y la orden del Fénix	1296627	Rowling...		{9780780674318,0780674316}	
4	<input checked="" type="checkbox"/> 3433026	Harry Potter and the Goblet of Fire	3433026	Rowling...		{9780736658478,0736658475}	
5	<input type="checkbox"/> 3591888	Harry Potter and the Goblet of Fire	3591888	Rowling...		{0545791421,9780545791427}	
6	<input checked="" type="checkbox"/> 4174364	Harry Potter and the Goblet of Fire	4174364	Rowling...		{0807282596,9780807282595}	
7	<input type="checkbox"/> 2901367	Harry Potter and the Order of the Phoenix	2901367	Rowling...		{9780807220290,0807220299}	
8	<input type="checkbox"/> 3473832	Harry Potter and the Order of the Phoenix	3473832	Rowling... New Yo...		{0786257784,9780786257782}	
9	<input type="checkbox"/> 1963701	Harry Potter and the Order of the Phoenix	1963701			{9781419802515,1419802518}	
10	<input type="checkbox"/> 3433032	Harry Potter and the Order of the Phoenix	3433032	Rowling...		{0807220290,0807220299}	

Adding records from the bibliographic record

- On the desired bib record, choose Other Actions—Add to Bucket.



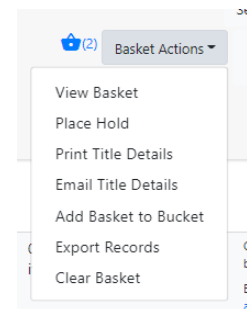
- Select a bucket from the drop down and Choose Add to Selected Bucket



- Repeat with each record you want to add.

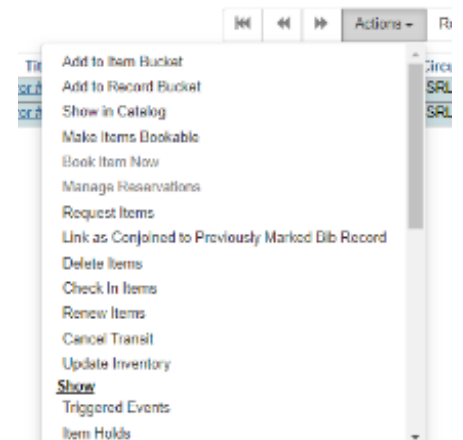
Add records from Baskets

- Perform a search and add the desired records to your basket.
- Go to basket actions and choose Add Basket to Bucket
- In the pop-up window, choose the bucket and click Add to Selected Bucket. The bucket will have the records from your basket in it.



To add records to a record bucket from a list of items in Item Status

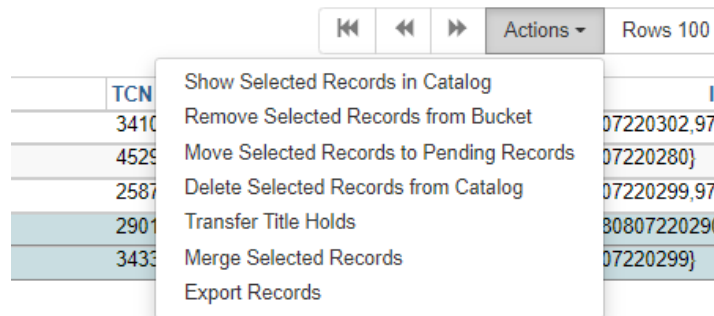
- Put items in Item Status. Select all the rows that you want to add to a Record Bucket. Bib Records attached to items will be added to the Record Bucket.
- Under the Actions menu, select Add to Record Bucket



- A window will open. To use an existing bucket, choose bucket name from dropdown list under Name of Existing Bucket. Click on Add to Selected Bucket.

2.8.4 Moving records between Record Buckets using Pending Records

- In your bucket, choose the records you want to move from the record bucket.
- Click on Actions.
- Choose Move Selected Records to Pending Records



- Click on the Buckets menu and select the Record Bucket that you want to move the records to
- Go to the Pending Records tab
- Select the records you want to move to the bucket you just chose.
- Click on Actions. Choose Add to Bucket.

Bucket #56318: Merge 4 items / Created 4/16/2014 10:55 AM / USER (scenicatmaster) @ SRL-HQ

Buckets▼		Batch Edit				Actions▼		R	
#	✓	Title	Record ID	TCN Value	Author (normalized)				
1	✓	harry.potter and the order of the phoenix	341046	341046	rowling, j k				
2	✓	harry.potter and the order of the phoenix	452900	452900	rowling, j k				
3	✓	harry.potter and the order of the phoenix	2587938	2587938	rowling, j k				
4	✓	Harry Potter and the Order of the Phoenix	2901367	2901367	Rowling, J. K.				
5	✓	Harry Potter and the Order of the Phoenix...	3433032	3433032	Rowling, J. K.				

2.8.5 Removing records from Record Buckets

To remove records from the Bucket View, select records and click on Actions then choose Remove Selected from Bucket. To clear the Pending Records section, Click on Actions then choose Clear List. To clear Record Query, do a new search. Refreshing your screen will clear both Record Query and Pending Records but not Bucket View.

2.8.6 Merging Bib Records in Record Buckets

- Click on the Buckets button under the Bucket View tab to choose the bucket you want to use. Use one of the methods described in [2.8.3 Adding Records to Record Buckets](#) to add records to a Record Bucket.
- Select records you want to merge. Under Actions menu, choose Merge Selected records.

Bucket #710354: Test 5 items / Created 5/20/2021 11:10 AM / USER (scenicatmaster) @ SRL-HQ

Buckets ▾ Batch Edit

#	<input type="checkbox"/>	Record ID	Title
1	<input type="checkbox"/>	1103658	Harry Potter and the goblet of fire
2	<input type="checkbox"/>	1938891	harry.potter.and.the.goblet.of.fire
3	<input type="checkbox"/>	3433026	Harry.Potter.and.the.Goblet.of.Fire
4	<input checked="" type="checkbox"/>	3473061	Harry Potter and the goblet of fire
5	<input checked="" type="checkbox"/>	4174364	Harry Potter and the Goblet of Fire

⏮
⏪
⏩
⏭
Actions ▾

- Show Selected Records in Catalog
- Remove Selected Records from Bucket
- Move Selected Records to Pending Records
- Delete Selected Records from Catalog
- Transfer Title Holds
- Merge Selected Records
- Export Records

- The records you want to merge will be displayed side by side so you can compare them.

- You can remove any of the records from the merge by clicking on the Remove from Consideration? button on that record.
- Choose the best record as lead record. When the records merge, the volumes and copies from the other records will be moved to the lead record and the other records will be deleted.
- Click on Merge.

2.8.7 Sharing Record Buckets

Bucket #710354: Test 5 items / Cre
(scenicatmaster) @ SRL-HQ

Load Shared Bucket

Bucket by ID

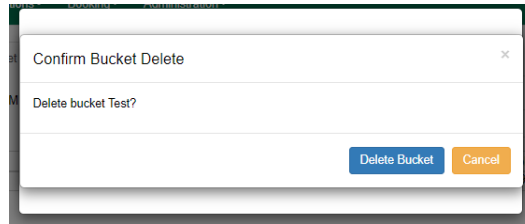
Bucket ID

Load Bucket

Cancel

- Click on the Buckets drop-down menu and choose the bucket you want to delete.

- Click on the Buckets drop-down menu again and choose Delete Bucket.
- Click Delete Bucket in confirmation window.



2.9 Temporary Records

2.9.1 Acquisitions (On order) Records

Acquisition records are minimal records that are put in the catalog when items are ordered. This allows patrons to put holds on the item before it is even in the library.

Whichever library is the first to receive that item is responsible for making the record complete even if it isn't the library who put the original acquisitions record in the catalog. Do NOT add another record.

2.9.2 ILL Records

ILL records are usually pre-cat item records used to circulate ILL items. They should be removed once the item has been returned.

3 Item Records

3.1 Call numbers and Items

3.1.1 Creating & Adding Item Records

After you have identified a matching record in the Evergreen database or imported one, you are ready to add your holdings to the bibliographic record.

- Click on the Holdings View tab
- Make sure your library or district is displayed in the Holdings Maintenance box
- Select the branch/location where the item needs to be added

<input type="checkbox"/>	7	SRL-HR	0	0
<input type="checkbox"/>	8	SRL-NH	0	0
<input type="checkbox"/>	9	SRL-OW	0	0
<input type="checkbox"/>	10	SRL-PC	0	0
<input type="checkbox"/>	11	SRL-SC	0	0
<input type="checkbox"/>	12	SRL-SN	0	0
<input checked="" type="checkbox"/>	13	SRL-UN	0	0
<input type="checkbox"/>	14	SRL-UN	0	0

- From the Actions menu, select Add Call Numbers and Items. Alternately, you can right click the highlighted branch/location and the Actions menu appears.

Item Table
MARC Edit
MARC View
View H

Holdings Maintenance
SRL

Actions for Selected Rows

Link as Conjoined to Marked Bib Record
Print Labels
Request Items
Add
Add Call Numbers
Add Call Numbers and Items
Add Item Alerts
Add Items
Add Items To Bucket
Reserve

- This opens the Holdings Editor window. The owning library should be the library/branch you selected. Fill in the call number label and barcode. Evergreen pulls a suggested call number from the 082 in the MARC record which you can use to build your local call number. Select a monograph part if needed.
- If you have more than one copy going to the same library/branch, change the number under “Items” to the number of items you have. Additional barcode boxes will appear.

Owning Library	Call Numbers	Classification	Prefix	Call Number Label	Suffix	Items	Barcode
SRL-UN	1	Generic		323/.092 B		2	

- Fill in information for your item. Each item must have an owning library, barcode, call number, shelving location, status, circulating library, and circulation modifier. You must also set whether it is holdable, reference, circulating and opac visible.
- If you highlight multiple branches, then all highlighted branches will appear in the Holdings Editor. However, any changes you make in the Working Items section will apply to all of them.

Owning Library	Call Numbers	Classification	Prefix	Call Number Label	Suffix	Items	Barcode	Item #	Part
SRL-HR	1	Generic		323/.092 B		1			
SRL-OW	1	Generic		323/.092 B		1			
SRL-SC	1	Generic		323/.092 B		1			

- Changes made in the Call Number section can be applied individually or you can apply changes across all call numbers with the Batch Apply row.
- The items you have added will be listed at the bottom of the screen, just below the Save & Exit button. To finish, click on the Save & Exit button at the bottom left of the screen.

Barcode	Created	Creator	Activated	Edited	Editor
3007249694	5/21/2021 3:30 PM	scenicatmaster		5/21/2021 3:30 PM	scenicatmaster

3.1.2 Creating and Using Templates in Edit Item Attributes

Since catalogers often apply the same attributes to the same types of items, templates can be used in the Holdings Editor to speed copy cataloging and minimize errors on item records.

Working Items		Completed Items	
Template: Chapter Books Apply			
Circulate? <input checked="" type="radio"/> Yes <input type="radio"/> No		Status: In process	
Shelving Location		OPAC Visible?	
		Circulating L: SRL-UN	
		Circulation M	

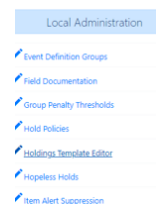
Creating a template

Templates can be created or edited in Holdings Editor which can be accessed from Holdings View of a bib

record or from Item Status—Actions Menu—Edit Call Number and Items.

Templates can also be created or edited by going to Administration—Local Administration—Holdings Template Editor.

If you have not yet created templates, there will be no drop-down box:



- To create a template, go to the Holdings Editor, click on the Item Template tab

Record Summary (MARC)

Title:	An easy burden : the civil rights movermer America
Author:	Young, Andrew 1932-
Bib Call #:	323/.092 B

[Edit](#)
[Item Templates](#)
[Defaults](#)

Template

- Select, and apply values for each attribute you want to include. As you edit the attributes, the box will be outlined in green. Any field that is not outlined in green, will not be affected when you apply the template.

Type a name for the template in the box and click on the Save button to save the template.

Deleting a template

Choose the template to be deleted from the drop-down box. Click Apply. Then click on Delete.

Template
[Apply](#)
[Save](#)
[Delete](#)

Circulate? ☐
 Status ☐

Changing template names

Choose the template to be changed. Click on Apply. Type the new name in the name box. Click on Save. The old template with the old name will still be there so it should be deleted.

Hide Fields

You can hide any fields you aren't using in the Holdings Editor.

- Click on the Defaults tab.
- Check the boxes next to the fields that you want to appear.

Record Summary

Title:	An easy burder America
Author:	Young, Andrew
Bib Call #:	323/.092 B

[Edit](#)
[Item Templates](#)
[Defaults](#)

Holdings Detail defaults

☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

[Edit](#) [Item Templates](#) [Defaults](#)

Holdings Detail defaults

☐ Always display Holdings Detail pane
☐ Allow Call Number attributes in Item Templates

Creation Defaults

Use Library Setting
 Unset Default Prefix
 Unset Default Suffix

☐ Auto-generate Barcodes
☐ Use checkdigit
☐ Print Item Labels on Save & Exit

Display defaults for Working Item tab

Item display

☒ Activated
☒ Created
☐ Call Number

Circulation

☒ Circulate?
☒ Circulation Library
☒ Circulation Modifier
☐ Circulate as Type
☐ Loan Duration
☐ Fine Level
☒ Shelving Location
☒ Holdable?
☒ Age-based Hold Protection
☒ Floating

Miscellaneous

☒ Add/Edit Item Alerts
☐ Deposit?
☐ Deposit Amount
☒ OPAC Visible?
☒ Price
☐ Quality
☒ Reference?
☒ Acquisition Cost
☒ Status
☒ Add/Edit Item Notes
☐ Item Notes are Public
 Statistical Categories
 Default Filter Library
☒ Edit Statistical Data
☒ Add/Edit Item Tags

Display defaults for Completed Items tab

☒ Barcode
☒ Created
☒ Creator
☒ Activated
☒ Edited
☒ Editor
☒ Call Number
☒ Circ Library
☒ Shelving Location
☒ Circ Modifier
☒ Circulate?
☒ Reference?
☒ Status
☒ OPAC Visible
☐ Item ID

Using Templates

Once you have created your templates, you can apply them to any item on any bib record.

- From the Holdings Editor screen, choose the desired template from the drop-down menu and click on Apply.
- The fields edited by that template will be highlighted in green.
- Once you have applied your templates, make any additional changes to the attributes and then click on the Save & Exit button.

[Working Items](#) [Completed Items](#)

Template: Available CDSP Adult Apply

Circulate?
☒ Yes
☐ No

Reference?
☐ Yes
☒ No

Circulation Modifier
 Books

Available CDSP Adult
 Available Donated Non-Fiction Adult Book
 Available New Fiction Adult
 Available Non-Fiction Juvenile Book
 Book Club Books
 Book Club Kit Bags
 Cake Pans
 Chapter Books
 Chargers
 Fishing Poles
 Genealogy
 Headphones
 Hot Spots

Circulating Library
 SRL-UN

OPAC Visible?
☒ Yes
☐ No

Acquisitions Co

You can apply more than one template to an item if needed. (For example, you can apply a template for the adult nonfiction collection and then one for an alert message for a book that is accompanied by a CD-ROM.)

Note: If you are working with multiple items, any changes made in the Holdings Editor (except in the call number area) will apply to all items.

3.1.3 Editing Call Number & Item Records

You can access Holdings Editor from multiple locations:

1. Holdings View of the Bib Record
2. Item Status
3. Item Table of the Bib Record
4. Item Buckets

In Holdings View

Making changes to existing call numbers and item attributes

- Retrieve bib record
- Click on tab for Holdings View
- Select the item with the call number you need to edit.
- Right click on the selected row

[Item Table](#) [MARC Edit](#) [MARC View](#) [View Holdings](#) [Monograph Parts](#) [Holdings View](#) [Completed Items](#) [Shelf Browse](#) [R](#)

Holdings Maintenance SRL

☒ Show Call Numbers ☒ Show Copies ☒ Show Empty Call Numbers ☒ Show Empty Libs

#	Location/Barcode	Call Numbers	Copies	Call Number	Barcode	Circ Library
1	145	4	4			
2	SRL	4	4			
3	NSL	0	0			
4	SRL-BK	0	0			
5	SRL-GE	0	0			
6	SRL-HQ	0	0			
7	SRL-HS	0	0			
8	SRL-NH	1	1			
9	PKC SITE	1	1	PKC SITE		
10	3007282949			PKC SITE	3007282949	SRL-NH

- Choose Edit Call Numbers and Items in the Edit Section of the Menu
- Holdings Editor will open. This will allow you to edit the call number and item attributes.

You can edit multiple call numbers across multiple branches at one time, if you have the permission level to do so.

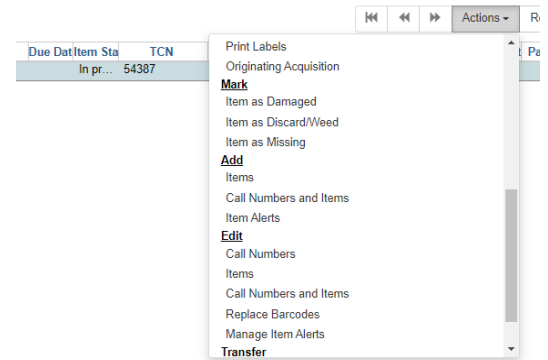
To make call number changes to all items at once. Type the call number in the Call Number box in the blue Batch Apply band then click Apply.

Owning Library	Call Numbers	Classification	Prefix	Call Number Label	Suffix	Items	Barcode	Item #
SRL-OW	1	Generic		FIC SITE		1	3007249694	
SRL-MH	1	Generic		FIC SITE		1	3007249694	
SRL-SC	1	Generic		FIC SITE		1	3007249694	

Evergreen will then redisplay the list with your edits.

From Item Status

- Scan item into Item Status
- Right click on item or click on Actions Menu.
- Choose Edit Call Numbers and Items from Edit Section of Menu
- Holdings Editor will open. Follow as outlined above.



Note: You can work with multiple items from different bib records this way but any changes made will (except in the call number area) apply to all items.

From Item Table of the Bib Record

- Click on the word “edit” shown in blue under the barcode of the item.
- Holdings Editor for that item will open.
- Make any changes to the call number or barcode.
- Since it opens to the Holdings Editor for that item, you cannot do multiple items this way.
- Follow as outlined above.

1	SRL-UN	B YOU	3007249694	View Edit
---	--------	-------	------------	---

From Item Buckets

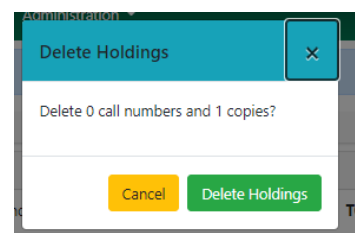
- Add item to Item Bucket. See [3.5.3](#)
- Right click on item or click on Actions Menu.
- Choose Edit Selected Items
- Holdings Editor will open. Follow as outlined above.

You can also print a label from any of these places by choosing Print Labels from the menu.

3.1.4 Deleting Call Numbers & Item Records

Deleting Items

Last Updated July 2021

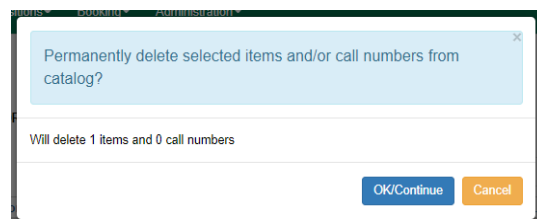


To delete items from a record:

- In Holdings View, select the item to be deleted.
- Right-click on the selected item
- Click on Delete Holdings Button

OR

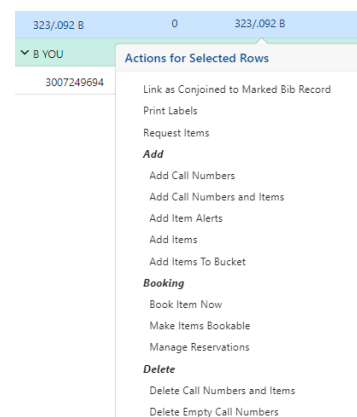
- Scan item into item status
- Right click on the item(s) or click on the Actions Menu.
- Choose Delete Items
- Click OK/Continue and the system will delete the item(s) and redisplay the listing



Deleting Empty Call Numbers

To delete empty call numbers from a record:

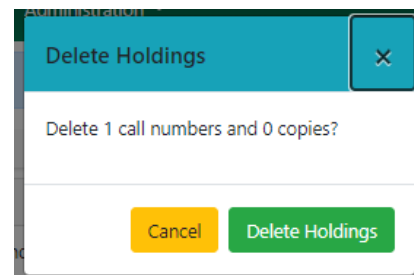
- In Holdings View, select the empty call numbers you wish to delete.
- Right-click on the selected call number.
- Click on Delete Empty Call Numbers.
- If the volumes still have items attached, nothing will happen. If the call number does not have any items attached, a dialog box will appear.
- Click OK/Continue and the system will delete the empty call number and redisplay the listing.



Deleting Call Numbers and Items together

To delete a call number and item together:

- In Holdings View, select the call number and item to be deleted.
- Right-click on the selected item
- Click on Delete Holdings Button



3.2 Manage Parts

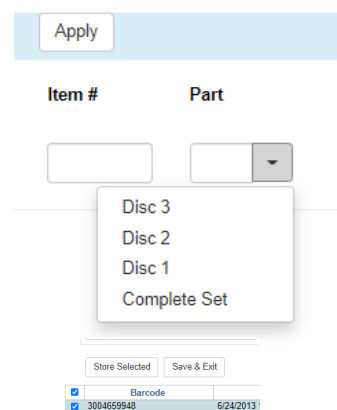
For the Missouri Evergreen policy on the common language for parts, see

<http://moevergreenlibraries.org/wp-content/uploads/2019/09/UNIFIED-PARTS-DOCUMENT.pdf>

3.2.1 Adding Parts

For items with multiple parts (encyclopedias, multi-disc collections, magazines, etc.), you can add parts in the Holdings Editor.

- Retrieve the record and go to Holdings View.
- Select the item that needs a part. Right click on the item.
- Select Edit Call Numbers and Items under the Edit section of the menu.
- Check the dropdown arrow next to the parts box to see if there is already a label that you can use. If there is, click on it.
- If there is not a label you can use, type the label you need in the box and then press enter on the keyboard.



- Make any other changes you need to make in Holdings Editor. Click Save & Exit at the bottom of the screen.

The parts designation will appear on the Holdings View screen, as well as in the OPAC.

Note: if you are adding parts to multiple items at the same time and the part you need is not listed in the drop down, you will need to go to Monograph Parts to add the part.

To add a part in the Monograph Parts tab:

- Go to the Monograph Parts in the Bib Record
- Click on New Monograph Part
- Type the name of the Monograph Part in the Label Box. Be sure to go by the Common Language for Parts guidelines.
- Click Save. Refresh the screen.

#	id	label
1	122886	Complete Set
2	39250	Disc 1
3	39251	Disc 2
4	39252	Disc 3

3.2.2 Merging Parts

The monograph part list for a bibliographic record may, over time, diverge from the prescribed format, resulting in multiple labels for what are essentially the same item. For instance, Vol. 1 may have variants like V.1, Vol 1, or Vol. 1 (leading space). Merging parts will allow cataloging staff to collapse the variants into one value.

In the Monograph Parts display:

1. Click the checkbox for all items you wish to merge including the one you wish to prevail when done.
2. Click on the first button in the row and select Merge Selected. A pop-up window will list the selected parts.
3. Click on the part you want to keep.

#	id	label	
<input checked="" type="checkbox"/>	1	191023	1
<input type="checkbox"/>	2	122886	Complete Set
<input checked="" type="checkbox"/>	3	39250	Disc 1

The undesired part labels will be deleted, and any copies that previously used those labels will now use the prevailing label.

3.2.3 Deleting Parts

Do not delete any existing monograph parts. If you believe that a part is being used incorrectly or not at all, please contact a member of the Cataloging Committee for review and removal.

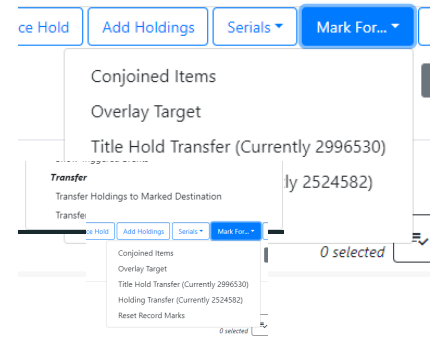
3.3 Transferring Items

There is a video of this process at

<http://moevergreenlibraries.org/wp-content/uploads/2019/09/ME-tranferring-items.mp4>

3.3.1 Transfer all call numbers and items

- Mark the whole bib as the transfer destination using Holding Transfer under the "Mark For" drop down menu at the top
- Go to record with existing items and select all call numbers
- Right click on one of the selected items to get the Actions menu and choose Transfer Holdings to Marked Destination



3.3.2 Transfer multiple items (entire call number)

- Mark the whole bib as the transfer destination using Holding Transfer under the "Mark For" drop down menu at the top
- Go to record with existing items and select just the call number that you wish to move
- Right click on selected item to get the Actions menu and choose "Transfer Holdings to Marked Destination"

3.3.3 Transfer multiple items (but not the entire call number)

1. Create call number on destination bib
2. Right click on the new call number to get the Actions menu and choose "Mark Library as Call Number/Transfer Destination" to designate it as the destination
3. Go to record with existing items and select the items you wish to move
4. Choose "Transfer Items to Marked Destination" from the actions menu

Mark

- Mark Item Damaged
- Mark Item Missing
- Mark Library/Call Number as Transfer Destination

Transfer

- Transfer Holdings to Marked Destination
- Transfer Items to Marked Destination

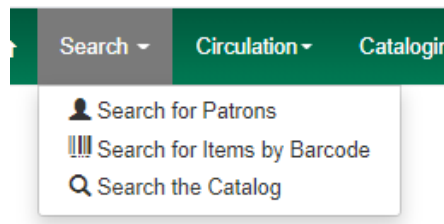
3.3.4 Transfer one item

- Mark library/branch on destination bib by right clicking on the library/branch of choice to get Actions Menu. Then choose "Mark Library as Call Number/Transfer Destination"
- Go to record with existing item and select the item you wish to move
- Choose "Transfer Items to Marked Destination" from the actions menu

Note: If you transferred the last item off of a record, the record will be deleted.

3.4 Item Status

You can get to Item Status through Search Menu. It is called Search for Items by Barcode.



You can get to it from the Circulation Menu or Cataloging menu under the name Item Status, or you can press the F5 button on your keyboard

You can use the Item Status for global changes to multiple items across multiple bibliographic records. Some cataloging functionality available in Holdings Editor is available through item status. Unlike in Holdings Editor, the functionality is not limited to one bibliographic record.

You can load item into the Item Status page in four ways:

1. Scan or type the barcode(s) directly into the search box
2. Transfer items from an item bucket
3. Transfer from the Holdings View of a bib record
4. Upload a text file of barcodes.

3.4.1 Display

Item Status has two views. List View and Detail View.

List View shows a list of all items in Item Status.

Scan Item

Submit OR No file chosen

Item Status

#	<input type="checkbox"/>	Status	Barcode	Call Numbe	Author	Title	Location	Due Date	Item #	TCN	Date Create	Owning Lib	Circulation	Public Parts	Float	Age-Based
1	<input type="checkbox"/>		3007249694	B YOU	young, a...	an easy burden	NonFictio...	In ...	54387		5/21/202...	SRL-UN	SRL-UN	19...		
2	<input checked="" type="checkbox"/>		3005308979	DVD CO...		Code black, Se...	Adult DV...	12/...	Av...	1927308	8/12/201...	SRL-HR	SRL-HR	20...	Co...	SR...

Detail View shows one item with tabs that show different types of information.

Scan Item

Submit OR No file chosen
 Actions- List View

Record Summary (MARC)

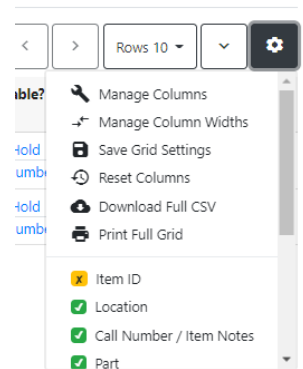
Title:	Code black Season 1	Edition:	TCN:	1927308	Created By:	sconicmaster
Author:		Pub Date:	Database ID:	1927308	Last Edited By:	sconicmaster
Bib Call #:	DVD 791.45 COD	Record Owner:			Last Edited On:	9/9/2017 10:41 AM

Barcode	3005308979	Circ Library	SRL-HR	Call # Prefix		Status	Available
Price	55.98	Owning Library	SRL-HR	Call #	DVD COD	Due Date	12/2/2020
Acquisition Cost	46.79	Shelving Location	Adult DVD	Call # Suffix		Checkout Date	11/18/2020 12:41 PM
ISBN	(9786316559425,6316559425)	Loan Duration	Normal	Renewal Type		Checkout Workstation	BLRL-K-SK-CIRC1
Date Created	8/12/2016 3:42 PM	Fine Level	Normal	Total Ctrcs	33	Duration Rule	14_days_0_renew
Date Active	9/7/2016 11:17 AM	Reference	false	Total Ctrcs - Current Year	0	Recurring Fine Rule	no_fine
Status Changed	5/21/2021 1:53 PM	OPAC Visible	true	Total Ctrcs - Prev Year	5	Max Fine Rule	no_fine
Item ID	2465366	Holdable	true	In-House Uses	0	Checkin Time	12/4/2020 8:39 AM
Circulate	true	Renewal Workstation		Remaining Renewals	0	Checkin Scan Time	12/4/2020 8:39 AM
Floating	SRLWA exclude HQ WPL BK	Circ Modifier	DVD	Age-based Hold Protection		Checkin Workstation	BLRL-K-SK-CIRC1
Inventory Date	12/16/2020 11:58 AM	Inventory Workstation	SRL-HR-HR 3				

3.4.2 Column Picker

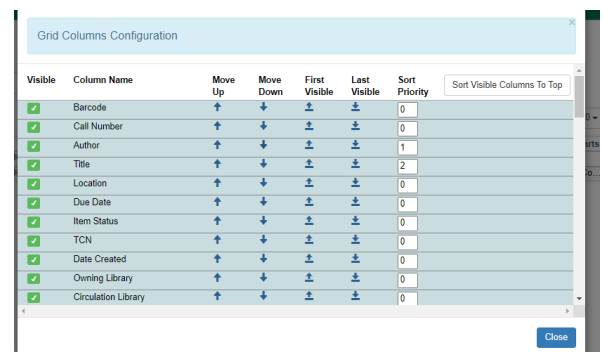
You can control what information is displayed by using the column picker. Many different screens have the column picker including Item Status, Item Buckets, Record Buckets, and Holdings View. It is usually on the right side of the screen. The options available in the Column Picker depend on the screen.

You can use the column picker to choose the elements you want to have displayed. Click on each entry to toggle it on or off. A check means it's visible an X means it's hidden. At the top of the column picker, click on Save columns to save your choices. Your choices become the default for your login.



Arranging Columns

Click on Manage Columns in the Column Picker. You can move columns up and down. (The column listed farthest up will be displayed on the far left. The column listed farthest down will be displayed on the far right.) You can also decide how the columns will be sorted. This is another place where you can decide what columns you want to see. Be sure to Save columns after making any changes.



Widening Columns

To widen a column, click on the arrows in the expand box for the column you want to widen. To shrink a column, click on the arrows in the shrink box for the column you want to shrink. Save columns after making any changes.

Item Status

#	<input type="checkbox"/>	Status	Barcode	Call Number	Author	Title	Location	Due Date	Item #	TCN	Date Created	Owning Library	Circulation	Public Parts	Floats	Age-Based
		Expand														
		Shrink														
1	<input type="checkbox"/>		3007249694	B YOU	young, a...	an easy burden	NonFictio...	In ...	54387		5/21/202...	SRL-UN	SRL-UN	19...		
2	<input type="checkbox"/>		3005308979	DVD CO...		Code black, Se...	Adult DV...	12/...	Av...	1927308	8/12/201...	SRL-HR	SRL-HR	20...	Co...	SR...

Note: If you expand a column and there is no room, space will be taken from the last column.

Sorting Columns

In Item status (and some other screens) columns can be sorted by clicking on the name of any column that has blue lettering. They can also be sorted in Manage Columns (see above). If you use Manage Columns, they will be sorted automatically as items are added in Item Status and Item Buckets.

When using Manage Columns to sort, but a 1 in the Sorting Priority Box in the row of the data that you want sorted first. Put a 2 in the Sorting Priority Box of the row of the data that you want it sorted by next. In the example, items will be sorted by Author first and then by Title.

Visible	Column Name	More Up	More Down	First Visible	Last Visible	Sort Priority	Sort Visible Columns To Top
<input checked="" type="checkbox"/>	Barcode	+	-	1	1	1	
<input checked="" type="checkbox"/>	Call Number	+	-	2	2	2	
<input checked="" type="checkbox"/>	Author	+	-	3	3	3	
<input checked="" type="checkbox"/>	Title	+	-	4	4	4	
<input checked="" type="checkbox"/>	Location	+	-	5	5	5	
<input checked="" type="checkbox"/>	Due Date	+	-	6	6	6	
<input checked="" type="checkbox"/>	Item Status	+	-	7	7	7	
<input checked="" type="checkbox"/>	TCN	+	-	8	8	8	
<input checked="" type="checkbox"/>	Date Created	+	-	9	9	9	
<input checked="" type="checkbox"/>	Owning Library	+	-	10	10	10	
<input checked="" type="checkbox"/>	Circulation Library	+	-	11	11	11	

3.4.3 Selecting Items

To select an item, click in the box at the beginning of the row you want to select. To select an additional item, hold down the CTRL key and click the box in another row. Hold down the CTRL key until you have clicked all the items you want to select. You can also click a check mark in the boxes at the beginning of the row of the ones you want to select.

#	<input type="checkbox"/>	Status	Barcode	Call Number	Author	Title	Location	Due Date	Item #	TCN	De
1	<input checked="" type="checkbox"/>		3007249694	B YOU	young, a...	an easy burden	NonFictio...	In ...	54387	5	
2	<input type="checkbox"/>		3150985323	DVD CO...		Code black, Se...	DVD Seri...	1/1...	Av...	1927308	9
3	<input checked="" type="checkbox"/>		3005308979	DVD CO...		Code black, Se...	Adult DV...	12/...	Av...	1927308	8

If you want to select several items in a row, click on the line. Hold down the shift key, then on the last line in the group

Item Status

#	<input type="checkbox"/>	Status	Barcode	Call Number	Author	Title	Location	Due Date	Item #	TCN	De
1	<input type="checkbox"/>		3007249694	B YOU	young, a...	an easy burden	NonFictio...	In ...	54387	5	
2	<input checked="" type="checkbox"/>		3150985323	DVD CO...		Code black, Se...	DVD Seri...	1/1...	Av...	1927308	9
3	<input checked="" type="checkbox"/>		3005308979	DVD CO...		Code black, Se...	Adult DV...	12/...	Av...	1927308	8

To select all the lines, click on the box at the very top left hand corner, next to the word Status.

Item Status

#	<input checked="" type="checkbox"/>	Status	Barcode	Call Number	Author	Title	Location	Due Date	Item #	TCN	De
1	<input checked="" type="checkbox"/>		3007249694	B YOU	young, a...	an easy burden	NonFictio...	In ...	54387	5	
2	<input checked="" type="checkbox"/>		3150985323	DVD CO...		Code black, Se...	DVD Seri...	1/1...	Av...	1927308	9
3	<input checked="" type="checkbox"/>		3005308979	DVD CO...		Code black, Se...	Adult DV...	12/...	Av...	1927308	8

3.4.4 Making Batch Changes

You can also use the Actions menus to make global

#	<input checked="" type="checkbox"/>	Status	Barcode	Call Number	Author	Title	Location	Due Date	Item #	TCN	De
1	<input checked="" type="checkbox"/>		3007249694	B YOU	young, a...	an easy burden	NonFictio...	In ...	54387	5	
2	<input checked="" type="checkbox"/>		3150985323	DVD CO...		Code black, Se...	DVD Seri...	1/1...	Av...	1927308	9
3	<input checked="" type="checkbox"/>		3005308979	DVD CO...		Code black, Se...	Adult DV...	12/...	Av...	1927308	8

changes to multiple items across multiple records, including batch label printing.

Select the items you want to edit. Click on Actions. (You can also right click to bring up the Actions Menu.) Select a function from the menu. Whatever you do will be done to all the items you have selected.

Print labels in batch

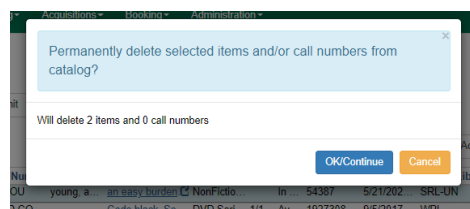
- Select the items you want to print labels for.
- In the Actions menu, under the Show section, choose Print Labels.
- Windows from here will depend on your printer setup.

Editing Items in batch

- Select the items you want to edit.
- In the Actions menu, under the Edit section, choose Call Numbers and Items.
- This will take you to the Edit Attributes Screen. Any changes you make will apply to all the items you selected.

Delete items in batch

- Select items you want to delete.
- In the Actions menu, in the top section, choose Delete Items.



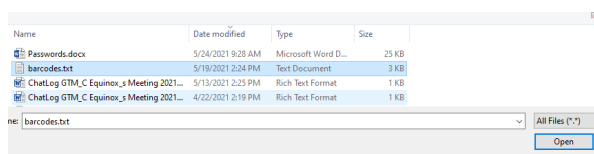
3.4.5 Uploading a Text File

You can upload a list of barcodes to the Item Status page so that you can view or edit items in batches.

- Create a text file (.txt extension) of barcodes, with one barcode per line. You can do this in Notepad.
- Click on the Choose File button to the right of the barcode input on the upper left corner of your screen
- Locate the file with the barcodes in it and click open

Scan Item

No file chosen



NOTE: There is no way to stop the file once it begins. Invalid entries will result in a click through warning box that the barcode is either mis-scanned or not cataloged. If you have a file with many incorrect barcodes, you will need to respond to the warning box each time.

- When the file finishes loading, the items will be listed in Item Status and the name of the file

Scan Item

barcodes.txt

Item Status

#	<input type="checkbox"/>	Status	Barcode	Call Number	Author	Title	Location	Due Date	TCN	Date
1	<input checked="" type="checkbox"/>		3000159568	GEN 973...	Anders, ...	The Eighteenth...	Genealo...	Av...	1165110	1/1/19
2	<input type="checkbox"/>		3002426237	GEN 976...	Andrae, ...	A true, brief his...	Genealo...	Av...	2153808	1/1/19
3	<input type="checkbox"/>		3003586904	GEN 973...	Bartels, ...	Civil War storie...	Genealo...	Av...	555355	9/1/20
4	<input type="checkbox"/>		3001006498	GEN 973...	Bartels, ...	The Civil War i...	Genealo...	Av...	3796423	1/1/19
5	<input type="checkbox"/>		3001672676	GEN 929...	Bentley, ...	County courtho...	Genealo...	Av...	3997449	1/1/19

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will show next to the Choose File button.

3.5 Item Buckets

In the Evergreen staff client, item buckets are virtual containers that hold items for batch processing.

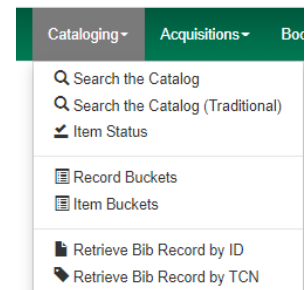
With item buckets, catalogers can edit item attributes, delete Items and print labels in batch. See [3.1.3](#)

All of these things can all be done from Item Status. The main advantage of Item Buckets is that you can keep the items in the bucket and come back to them later.

3.5.1 Item Bucket Basics

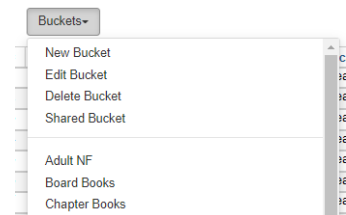
Item buckets can be used to batch process items or to collect items to be batch processed in the Item Status interface. The Item Bucket interface is accessed from the Cataloging Menu--Item Buckets or from the home page.

From here, you can create new buckets, edit buckets, share buckets, delete buckets, and edit and delete the Items in buckets. The interface has two tabs, Pending Items and Bucket View.



Bucket view

The Bucket View is the part of the interface where the buckets and their contents reside. From here you can create new buckets, edit buckets, share buckets, delete buckets, and edit or delete the items in the buckets. The Buckets drop-down menu contains the list of buckets already created.



3.5.2 Creating item buckets

- Click on the the Buckets button and choose New Bucket.
- Use a distinctive, explanatory name for the bucket.
- Click on Create Bucket

You cannot reuse a name already in use. However, the bucket interface is case sensitive, so you can have the same name in different case.

A screenshot of the 'Create Bucket' dialog box. It has a title bar 'Create Bucket' with a close button. Inside, there are two text input fields: 'Name' and 'Description'. Below the 'Description' field is a checkbox labeled 'Shareable' with an eye icon. At the bottom right are two buttons: 'Create Bucket' (blue) and 'Cancel' (orange).

You can also create an item bucket from Holdings View.

- Select your item(s) and choose Add Items to Buckets from the Actions menu.

A screenshot of the 'Add Item #2465366 to Bucket' dialog box. It has a title bar with the item number and a close button. Below the title bar are three tabs: 'Existing bucket', 'New bucket', and 'Shared bucket'. The 'New bucket' tab is selected. Below the tabs are two text input fields: 'New Bucket Name...' and 'Optional New Bucket Description...'. At the bottom right is a blue button labeled 'Add To New Bucket'.

- In the dialog box, click on New Bucket tab.
- Type a new name in the box Name of New Bucket.
- Click on Add to New Bucket. The selected item(s) from Holdings View will be in the New Bucket.

You can create new buckets from Item Status.

- Select the items you wish to put in a Bucket
- Choose Add Items to Bucket from the Actions menu
- Enter a name in Name for New Bucket Box.
- Click on Add to New Bucket. The selected item(s) from Item Status will be in the New Bucket.

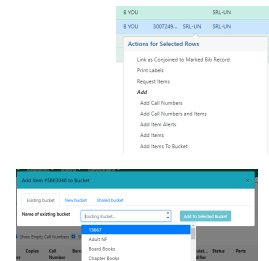
3.5.3 Adding items to item buckets

There are three ways you can add items to item buckets:

1. From Holdings View
2. From Item Status
3. From Pending Items

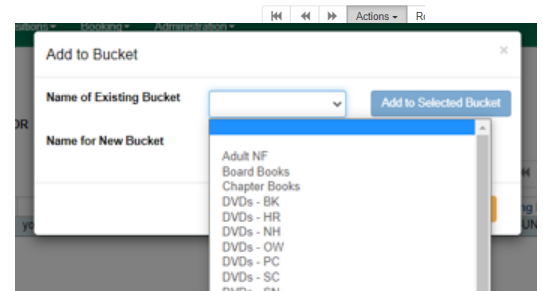
From the Holdings View of a bibliographic record,

- Select the item(s) you wish to add to a bucket.
- Then right-click and choose Add Items to Buckets.
- Click on the dropdown arrow of Name of Existing Bucket box and choose a bucket.
- Or create a new one following the directions in [3.5.2](#)



From Item Status,

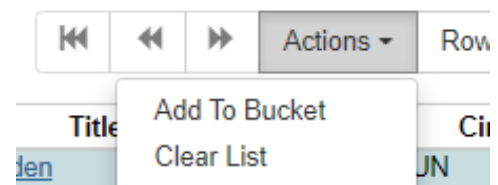
- Select the item you want to add to a bucket
- Right click on it or click on Action Menu and select Add to Item Bucket
- Click on the dropdown arrow of Name of Existing Bucket box and choose a bucket, or create a new one following the directions in [3.5.2](#)



From Pending Items

The Pending Items area allows you to “park” items in order to add them to a bucket or move them from one bucket to another.

- Click the bucket view tab and choose or create the bucket you want to add the items to.
- Click the Pending Items tab and scan or type the barcode into the box.
- After you have scanned all the items in, click on the ones you

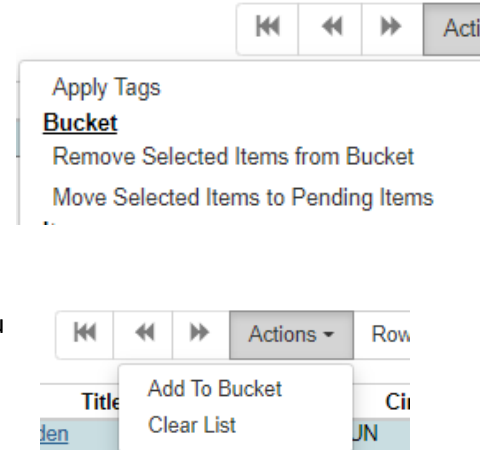


want to add to the bucket. Then click on Actions—Add to Bucket

You can clear Pending items by clicking on Clear List or refreshing the screen.

3.5.4 Moving Records between Item Buckets using Pending Records

- In Bucket View, choose the bucket you want to move an item FROM
- Select the items you want to move
- Click on the Actions button and choose Move Selected Items to Pending Items
- This will move the item(s) into the Pending Items area
- In the Pending Items tab, Click on Buckets and choose the bucket you want to move the items TO
- Select the items you want to move
- Click on Actions—Add to Bucket

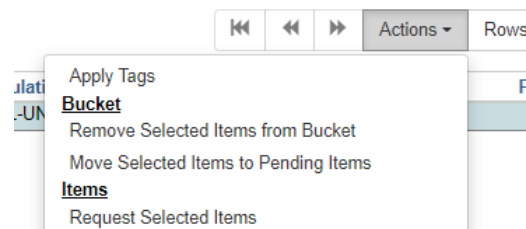


3.5.5 Removing items from Item Buckets

When you have completed the tasks for those items in the bucket, clear out the contents by selecting them all and then clicking Actions—Remove Selected Items from Bucket.

Your bucket is ready to repopulate and use again.

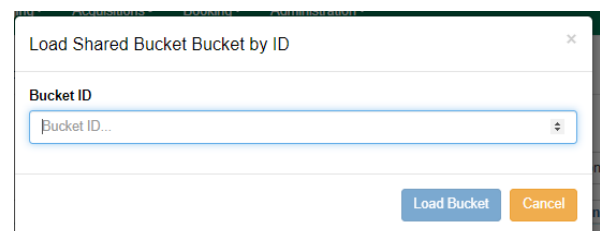
Note: Make sure you click on Remove Selected from Bucket and not Delete Selected Items From Catalog



3.5.6 Sharing Item buckets

Every bucket is assigned a number. You can share any bucket with another user by communicating the bucket number to them. Shared buckets are retrieved using this number. Click on the Buckets drop-down menu and choose Shared Bucket.

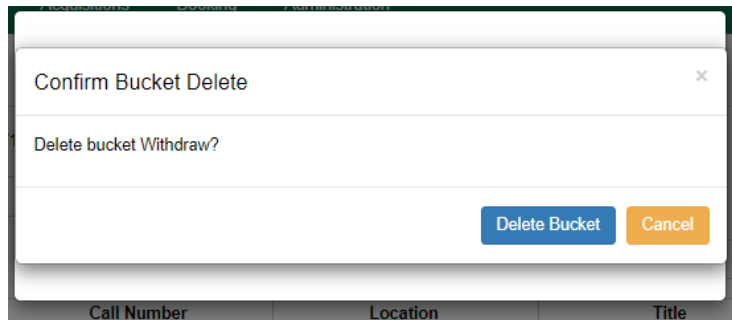
Enter the bucket number in the dialog box to access the bucket.



3.5.7 Deleting item buckets

You can also delete buckets from Bucket View. Open the bucket you want to Delete by clicking on the

Buckets button and selecting the name of the bucket you want to delete. Once it is open, choose Delete Bucket from the Buckets drop-down menu. There will be a confirmation message.



Appendix

Common Language for Parts

COMMON LANGUAGE FOR MAGAZINE PARTS

IMPORTANT: Before creating a part for a magazine, check to be sure that a part has not already been created.

1. For monthly magazines—May 2018 would be expressed as 2018/05 (the “0” in front of the 5 is vital to make the issues fall in the correct order)
2. For weekly magazines—May 15, 2018 would be expressed as 2018/05/15
3. For double issues of weekly magazines—A magazine dated July 9-16, 2018 would be expressed as 2018/07/09-07/16.
4. For bi-monthly magazines, or a monthly magazine publishing a double issue—May/June 2018 would be expressed as 2018/05-06
5. For bi-monthly magazines, or a monthly magazine publishing a double issue where the publishing dates cross calendar years—December 2018/January 2019 would be expressed as 2018/12-2019/01
6. For special issues of magazines, magazines that publish quarterly, etc.—If you are the first cataloger to add an issue, use your best judgment for format, keeping in mind not to use abbreviations, and to use initial caps. For example, a magazine with a publication date of Summer 2018 would be expressed as 2018/Summer.

COMMON LANGUAGE FOR BOOK VOLUMES

When is it appropriate to use the parts field on a bibliographic record for a book?

1. The parts field for a book is intended for the volume number of a multi-volume set. For example, for an encyclopedia set, each volume would be labelled “Volume 1”, “Volume 2”, etc., using an initial capital letter for Volume, and expressing the number as is shown on the actual item.
2. The parts field for a book is also intended for the date of an annual publication. Each subsequent volume would be labelled with the year of publication as expressed on the item.

When is it NOT -appropriate to use the parts field on a bibliographic record for a book?

1. It is not to be used to express what number the book represents in a series. This information is expressed in a 490 tag in the MARC record.
2. It is not to be used to express an edition number. This information is expressed in a 250 tag in the MARC record.

Examples of the correct use of parts field on books:

TCN # 1191451—Lands and Peoples: a six-volume set of books, printed and sold as a set. All six volumes are cataloged on one bibliographic record, with each volume represented by its volume number.

TCN # 482714—Current Biography Yearbook: a serial publication with both an ISBN and ISSN number, with new volumes published yearly. Each subsequent item is cataloged onto a common bibliographic record, with the year of publication included in the parts field.

COMMON LANGUAGE FOR DVD PARTS

The following items are requirements for adding all DVD sets that have the potential to be split into parts:

1. Any DVD set that could be split into part must have an entry in the parts field, even if no library is splitting the set into parts. The first library that adds the record and places an item onto it, is responsible for starting this process.
2. A DVD set that is circulated as a whole (in one case, covered by one barcode) must have "Complete Set" in the parts field, with the "C" and "S" both capitalized. This is the only wording that should be used for the sake of uniformity and to avoid the creation of extra part labels.
3. A DVD set that is circulated in parts (in two or more cases, with multiple barcodes) must have "Discs x-x" in the parts field. Please pay attention to the details in this field; the "D" is capitalized, the spelling is "Discs", numerals are used for the disc range, and there is no space between the numerals and the hyphen. This is the only wording that should be used for the sake of uniformity and to avoid the creation of extra part labels.
4. Labels in the parts field are case sensitive; please use the exact wording and capitalization pattern set forth to avoid the creation of extra labels.
5. Catalogers have the permission enabled to allow the merging of parts. For example, if the DVD set has both "Complete Set" and "All discs" as parts, these parts can be merged with "Complete Set" chosen as the remaining part.
6. Catalogers will be required to enter DVD sets in this manner from this date forward. They are encouraged to revisit existing holdings and revise the parts field to match the uniform wording.

Approved by the Missouri Evergreen Executive Committee, March 15, 2018.

Guidelines for combining into a single bib record

NOTE: These guidelines should be used when adding a new item to the catalog as well.

Books

Books with the exact same content and in the same format should be combined on the same bibliographic record, even when non-content features such as binding, publisher, shape, size, and pagination differ. The intention is for the Missouri Evergreen catalog to be as patron-friendly as possible to simplify searching and the placement of holds.

DO use a single bib record for books **when content is exactly the same** :

- Hardcover and paperbacks
- Different publishers and their imprints and pub dates - **add a note in the 500: Publisher, publishing date and paging may vary**
- Differences in shape, size, and pagination: within 3 cm. and/or 10 pages
- Movie tie-in books, autographed books, anniversary editions, Walmart/Target editions, rebound books (i.e. Paw Print)

DO NOT use a single bib record for books when the items differ from one another in the following ways:

- Mass-market paperback binding
- Editions with different content (i.e. Special editions vs. no edition statement, revised editions)
- Different print sizes (i.e. Large print, larger print)
- Different language
- A new/different foreword or analysis
- Illustrated versions vs. text-only editions
- Different illustrator or translator
- Full-color illustrated vs. black & white illustrated
- Different format (i.e. audiobook vs. print material) • New accompanying material

Audiobooks

Audiobooks with the exact same content and in the same format should be combined on the same bibliographic record, even if non-content features such as publisher or distributor differ. The intention is for the Missouri Evergreen catalog to be as patron-friendly as possible to simplify searching and the placement of holds.

Do use a single bibliographic record for audiobooks **when content is exactly the same** :

- Same narrator
- Running length is the same
- Same number of discs

- Same format

Do NOT use a single bib record for audiobooks when the items differ from one another in the following ways:

- Different narrator
- Abridged vs. unabridged
- Additional special content (i.e. bonus disc, interview with author, etc.)
- Different running length or number of discs
- Different format (i.e. MP3 vs. standard audio CD)

DVDs

DVDs with the exact same content and in the same format should be combined on the same bibliographic record, even if non-content features such as publisher or distributor differ. The intention is for the Missouri Evergreen catalog to be as patron-friendly as possible to simplify searching and the placement of holds.

Do use a single bibliographic record for DVDs **when content is exactly the same :**

- Same number of discs
- Same runtime
- Same type of discs (DVD vs BluRay)
- Same special features
- Fullscreen and widescreen DVDs

Do NOT use a single bib record for DVDs when the items differ from one another in the following ways:

- Blu-ray/DVD combo pack vs. DVD or Blu-ray only bib
- Inclusion of special features vs. no special features

IMPORTANT KEY POINTS:

When combining/merging records, there are things you MUST remember to do.

- Copy all 020 fields from records being merged to ensure that all ISBNs will appear on the lead record
 - MUST also include the qualifier (\$q field)
- For A/V materials, copy all 024 fields from records being merged to ensure that all UPCs will appear on the lead record
- Add a field in the 500: Publisher, publishing date and paging may vary
- Copy any important fields from records being merged to ensure discovery by users. ◦
Examples: 520, 650, 655, 700, etc.

- Remove any 250 edition statements referring to binding
- Place a 902 field in the record
 - \$a[OCLC SYMBOL]\$b[date merged]\$cmerged
 - \$aMJ8\$b08/01/2035\$cmerged

If interested in more information, please see OCLC's "[When to Input a New Record](#)" guidelines.

Adding individual copies of periodicals

Type in the name of the magazine into the catalog search

Click on actions for this record

- Click on the Monograph Parts tab.
- Click on new monograph part

The screenshot shows a web browser window with the URL `missourievergreen.org/eg/staff/cat/catalog/record/55448?query=people%20weekly`. The interface includes a navigation bar with tabs like Search, Circulation, Cataloging, Acquisitions, Booking, and Administration. Below the navigation bar, there are buttons for Start, Previous, Next, End, and Back To Results (4 / 324). The main content area is titled 'Monograph Parts' and contains a table with columns for a checkbox, a number, and a label. The table lists 18 entries, each with a date in the label column. To the right of the table, there are buttons for Merge Selected, New Monograph Part, and Delete Selected. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 3:00 PM on 2/16/2021.

✓	#	label
<input type="checkbox"/>	1	06/15/2020
<input type="checkbox"/>	2	06/29/2020
<input type="checkbox"/>	3	08/2020
<input type="checkbox"/>	4	09/14/2020
<input type="checkbox"/>	5	09/2020
<input type="checkbox"/>	6	2002/11/18
<input type="checkbox"/>	7	2003/05/26
<input type="checkbox"/>	8	2003/06/02
<input type="checkbox"/>	9	2003/06/09
<input type="checkbox"/>	10	2003/06/23
<input type="checkbox"/>	11	2003/07/07
<input type="checkbox"/>	12	2003/07/14
<input type="checkbox"/>	13	2003/07/28
<input type="checkbox"/>	14	2003/08/04
<input type="checkbox"/>	15	2003/08/11
<input type="checkbox"/>	16	2003/09/15
<input type="checkbox"/>	17	2004/10/18
<input type="checkbox"/>	18	2004/10/25

In label enter the issue example: 2021/02 for February 2021 for a monthly magazine. Click this link for more information about formatting parts.

- Choose save
- Click on magazine title line in Holdings View
- Highlight call number line.
- Click on the Holdings Maintenance tab.
- Right-click on call number line and choose “Add items.”

The screenshot shows the 'Holdings Editor' interface for a library catalog. The browser address bar displays the URL: `missourievergreen.org/eg/staff/cat/catalog/record/55448?query=people%20weekly`. The interface includes a top navigation bar with tabs for Search, Circulation, Cataloging, Acquisitions, Booking, and Administration. Below this is a toolbar with buttons for Start, Previous, Next, End, and Back To Results (4 / 324). The main area displays a table of holdings for 'People Weekly' magazine at SKPL. A right-click context menu is open over the call number '34140000056094', showing options like 'Show', 'Mark', 'Add', and 'Edit'. The table has columns for Owning Library, Call Number, Location, Item #, Barcode, Status, and Alerts.

#	Owning Library	Call Number	Location	Item #	Barcode	Status	Alerts
1	SKP ... SKPL	People Weekly	Magazine		34140000056094	Available	0 Manage
2	SKPL	People Weekly	Magazine			Available	0 Manage
3	SKPL	People Weekly	Magazine			Available	0 Manage
4	SKPL	People Weekly	Magazine			Available	0 Manage
5	SKPL	People Weekly	Magazine			Available	0 Manage
6	SKPL	People Weekly	Magazine			Available	0 Manage
7	SKPL	People Weekly	Magazine			Available	0 Manage
8	SKPL	People Weekly	Magazine			Available	0 Manage
9	SKPL	People Weekly	Magazine			Available	0 Manage
10	SKPL	People Weekly	Magazine			Available	0 Manage
11	SKPL	People Weekly	Magazine			Available	0 Manage
12	SKPL	People Weekly	Magazine			Available	0 Manage
13	SKPL	People Weekly	Magazine			Available	0 Manage
14	SKPL	People Weekly	Magazine		34140000056022	Available	0 Manage

- Scan barcode, then tab over and choose part designation.
- Make Changes in copy editor that apply
- Click on “Save/Exit” when changes are complete.