



MISSOURI EVERGREEN **CATALOGING TRAINING** **COURSE – Basic Cataloging**

As a part of the Missouri Evergreen Consortium (MEC), all member libraries should understand that building a consortium catalog that is easy for our patrons to use and is consistent requires a common set of policies, practices, and training for creating and maintaining bibliographic records. These records are the shared property of the consortium, and they benefit all of our members and are for everyone's use. It doesn't matter which library created the record, who transferred it into the database, or who has edited it. As a consortium, we all share this data, and as such, we also share the responsibility of maintaining the quality and integrity of each bibliographic record.

With recommendations from the Missouri Evergreen Cataloging Committee, the Missouri Evergreen Executive Board sets standards for the creation and inclusion of these records. The Missouri Evergreen Cataloging Committee oversees quality assurance and cataloger training. To that end, we have created this training course for cataloging correctly and efficiently. The course will be divided into two sections: Basic Cataloging and Advanced Cataloging. Each member library must have at least one advanced cataloger identified from their employees. Both levels will be required to take this course, which is made up of readings, how-to videos, and practical work. After passing each level course, the participant will be notified of their successful completion. A passing score on the basic course will be required to progress to the advanced course.

All readings, PDFs, and practical work will be maintained on the Missouri Evergreen Consortium website and will be accessible asynchronously. This ensures that everyone has access to the most current training materials at all times. These materials will be updated regularly to reflect the current methods of cataloging by the Missouri Cataloging Committee as well as incorporating updates from the Evergreen system as they are created. Catalogers at either level must take the required course and pass the exam, regardless of how long they have been working in Evergreen. This ensures everyone has the same training and can do the work as expected.

[Click this link](#) to read the Missouri Evergreen Cataloging Policy. This policy sets the guidelines for this training.

Basic Cataloging

Basic cataloging assumes the trainee has little or no experience with library cataloging, a unique job within the overall library system. This course looks briefly at the history of cataloging with an emphasis on the systems used and why they are still used today, including short discussions of MARC and RDA, the newest cataloging system. This course will also identify sources of cataloging information and why they are used. We will look at the philosophy behind cataloging and why this is a needed but often downplayed part of the library system. Finally, using all of these tools, we will go into the Missouri Evergreen Training Database and begin editing MARC records, which will include adding and editing call numbers and item-level data, deleting call numbers and items, creating monograph parts for resources as needed, transferring items from one bibliographic record to another, and replacing barcodes. Coursework will include readings, how-to videos, practical work in the Missouri Evergreen Training server and a final exam.

- Course PDF
 - Introduction & additional readings
 - History of Cataloging: AACR2, MARC, RDA
 - Terms and acronyms
 - Introductory cataloging videos (ABLE training)
 - MARC record breakdown
- List of useful websites
- Evergreen keyboard shortcuts
- [Missouri Evergreen Test Server](#) (for practical work). This includes configuring the server and registering a workstation.
- Coursework --Editing item records, including:
 - Server sign-in
 - Adding holdings and item-level data
 - Creating holdings templates
 - Adding and editing call numbers
 - Deleting call numbers and items
 - Replacing barcodes
 - Transferring items between bibliographic records
 - Adding monograph parts to specific records
 - MEC best practices for these tasks
- Specific Missouri Evergreen Training Videos (short, task focused)
- Practical work
- Pre-certificate test check list
- Certificate exam

Introduction -- or why *DO* we catalog?

We all have some organization and disorganization in our lives. The junk drawer in my kitchen is a huge mess, a literal store-all drawer for anything that doesn't have a set place in the house. It contains everything from batteries to matches to toothpicks to measuring tapes to office supplies – you name it, it's in there. There's no rhyme or reason to it, just unorganized chaos. But if I need something obscure, I look there first. Because I created it, I understand its function and its contents. But guests in my house looking for something else might not.

In contrast, my Tupperware cupboard is meticulously organized. After years of having lids and storage containers that didn't fit, I went through it all and matched each lid to each container and recycled those that didn't have a match. As a result, the cupboard is leaner and is completely organized. Anyone looking in it for food storage will see exactly what they need, complete with its matching lid.

THAT'S the difference between an ok library catalog and a great library catalog: precise organization, simplicity in construction that's easy to use and consistent in terms of data and aesthetics. Ideally, if a cataloger has done his or her job correctly, patrons and staff can find what they want easily, and the overall look of the catalog will be consistent. If the catalog is a mess, it becomes very obvious very quickly to everyone that consistency was an afterthought, much like my junk drawer of unorganized chaos. Additionally, in our modern electronic world, changes can be made quickly and completely to the catalog. There's really no reason for any library to have a haphazard catalog.

That's why this training was created—to give both the novice cataloger and the cataloging pro the training and tools necessary to catalog materials correctly and consistently using the Evergreen Integrated Library System (ILS). This training will incorporate the procedures and policies outlined by the Missouri Evergreen Consortium. As of this writing, we are 56 libraries strong. We are the largest library consortium in Missouri, with more materials and checkouts than any other Missouri library system or consortium. To that end, and mostly for our patrons, we need an easy-to-use and easily understandable catalog they can use to find the materials they want. Your job – should you choose to accept it – is to help make our catalog the best it can be.

Please have access to a copy of the book ***“Crash Course in Basic Cataloging with RDA”*** (ISBN 9781440837760). We will be referring to this book throughout this training. You can get it [here](#) from Amazon as a physical copy or as a Kindle book.

Further reading: please read [Reflections on Ranganathan's Five Laws of Library Science](#) by Richard A. Leiter for a reflection on library work in general. This makes for a great starting point for our discussion.

Another interesting article about the history of cataloging: [The Evolving Catalog](#) by Karen Coyle

History of Cataloging: AACR2, MARC, RDA

For a succinct history of cataloging and the rules we follow, you may read the introduction and pages 1-9 of the Basic Cataloging with RDA book

Term and acronyms

- **MEC** – Missouri Evergreen Consortium
- **ILS** – Integrated Library System. The computer program that houses all of our data and provides the modules we use in the library world, including circulation, Cataloging and acquisitions. For our purposes, we will refer to the ILS in this training as Evergreen.
- **OPAC** - Online Public Access Catalog. This is the term we use for what our users see on the public-facing catalog.
- **Workstation** – The specific computer you use to log into the Evergreen system
- **Library Code** – this is a short abbreviation code in Evergreen that identifies specific libraries. Some of these codes come from OCLC.
- **TCN** – Title Control Number—This is a unique record number given to each MARC record in MEC.
- **MARC** – MAchine-Readeable Cataloging. Created in the 1960s by computer scientist Henrietta Avram, this code allows computers to read library records, making library automation possible and allowing bibliographic records to be shared electronically by libraries. We still use this standard today.
- **Holdings**—this refers to specific items that are available in the MEC system. Item holdings are broken down by each individual library by call number and barcode.
- **Call Number** – A subject cataloging number derived from the Dewey Decimal system used in MEC. Call numbers are typically added to a resource’s spine to allow them to be shelved correctly and to be located easily.
- **Barcode** – typically a sticker added to a physical resource to allow for quick checkout and for checking a specific item’s status.
- **Monographic Parts** – a sub-element of a MARC record that indicates parts of a whole. Series like encyclopedias can be broken down by volume and DVD series can be broken down by a specific disc.
- **LoC** - Library of Congress
- **AAP** - Authorized Access Point. Names, subjects, and series all have authority records overseen by the Library of Congress. In nearly all instances, an author will have a certain way their names should appear in the MARC records. The subject headings, geographic headings, and genre/form terms that are used in bibliographic records are only those authorized by the Library of Congress.

- **OCLC** - **O**nline **C**omputer **L**ibrary **C**enter. The leading metadata service provider in the U.S. and maintains the largest bibliographic record database in the world.
- **RDA**- **R**esource **D**escription and **A**ccess. RDA began in June 2010 and is the standardized descriptive cataloging rules followed by libraries today.
- **Bibliographic** and **non-bibliographic**. These terms refer to books and non-books respectively.

We will be using most of these terms and acronyms throughout this training so please be familiar with them.

Introductory cataloging videos

Below are links to some introductory training programs offered by ABLE. These will introduce some of the other basic elements of cataloging. They are not required for this course, but much of the information can be helpful.

Note: Some of these training modules reference the older AACR2 standards, which are not in use at Missouri Evergreen. Portions of these trainings that cover some formatting may be different with RDA.

- a. [ABLE Course 5 Introduction to Technical Services Cataloging](#)
- b. [ABLE Course 6 Introduction to Subject Headings](#)
- c. [ABLE Course 7 Introduction to Dewey Classification](#)
- d. [ABLE Course 8 Introduction to MARC System](#)

Breakdown of a bibliographic MARC record

A **bibliographic record** is made up of **fields**. Each field has a **MARC tag** or number assigned to it that designates the type of information found in that field. Following the MARC tag are two positions called **indicators**. Most fields have several parts, or **subfields** to them, which are divided and defined by **delimiters**.

A complete breakdown of the MARC fields, subfields and delimiters can be found on the Library of Congress' website for [MARC 21 format of bibliographic data](#) and on the [OCLC Bibliographic Formats and Standards](#) website.

HIGHLY RECOMMEND you bookmark both sites as they provide an essential explanation of the MARC format. Both sites are great references for cataloging and we will be using them throughout this training.

Let's look at a MARC record for a better explanation. Please look up Title Control Number (TCN) **2585123** in Evergreen then click on the "**MARC View**" tab. We'll use this MARC record for the following explanation below.

LDR 01584cam a2200469 i 4500

001

2585123

All of the numbers in **yellow** are **MARC tags**. As mentioned, each serves a specific purpose.

003

005 20170914144532.0

008 150211r20151971nyua j 000 1 eng

‡a2014501069

010

In **purple** are the information **subfields**. Every MARC tag will have at least one subfield which is defined by a preceding letter or number. Each subfield is separated by a delimiter, a symbol that organizes the information. Both the subfield letter and the delimiter in **light blue**.

020 ‡a9780553508734\$gboardbook

020 ‡a0553508733\$gboardbook

035 ‡aocolc877843968

035 ‡a(OCoLC)877843968

040 ‡beng ‡rda

040

‡alcac ‡apcc

042

Highlighted in **green** are **indicators**. There are two spaces for these numbers, but they are not always used for each MARC tag as you can see here.

049 †aMO2

082 0 0 †a[E] †223

100 1 †aStone, Jon. †0(ME)418245

245 1 4 †aThe monster at the end of this book : †bstarring lovable, furry old Grover / †cby Jon Stone ; illustrated by Michael Smollin.

264 1 †aNew York : †bGolden Books, †c©2015.

300 †a1 volume (unpaged) : †bcolor illustrations ; †c21 cm.

336 †atext †btxt †2rdacontent

337 †aunmediated †bn †2rdamedia

338 †avolume †bnc †2rdacarrier

490 1 †aA little Golden Board book.

500 1 0 †aPublisher, publishing date and paging may vary.

500 †aAt head of title: 123 Sesame Street.

500 †aCover title.

500 †aOn board pages.

520 †aGrover worries page by page about meeting the monster at the end of this book.

521 8 †aAD450L †bLexile

650 0 †aMonsters †vBoard books.

650 0 †aPuppets †vBoard books.

700 1 †aSmollin, Michael, †eillustrator. †0(ME)394224

710 2 †aRandom House (Firm) †0(ME)3307

730 0 †aSesame Street (Television program) †0(ME)2376

830 0 †Little golden board book. †0(ME)568880

904 †aMARCIVE 2020

904 †aMARCIVE 2020

Now let's breakdown some of these tags from the record above and see how we can use them. The following explanation includes tags that are required in our Missouri Evergreen system and some that are strongly recommended. Again, for a more in-depth explanation of MARC tags, please refer to the [Library of Congress MARC 21 Formats](#) and the [OCLC Formats and Standards](#) websites.

(Note: in this explanation, I might reference the tag I'm explaining to another set of tags using the following abbreviation: the 5xx tag for example. This is just a shortcut which means the data or explanation will take place in the 500 series of tags.).

First of all, punctuation plays a big part in bibliographic records and is used to identify and separate the elements and areas of the tags. As with most things in bibliographic records, punctuation is standardized, in this case by ISBD (International Standard Bibliographic Description). The order of elements and standardized punctuation make it easier to interpret bibliographic records.

- **LDR 01584cam a2200469 1 4500 – the Leader.** A record's TCN number will be autogenerated by the system when the record is added to Evergreen.
- **008 150211r20151971nyua j 000 1 eng** – This fixed field contains coded data related to the resource. This needs to be filled out in the Evergreen ILS 100% of the time. The following are some of the most often-used codes for books:
 - Type – a (for a book)
 - ELvl – I
 - Audn – e (adult), j (juv), g (general)
 - Lang – eng (English)
 - BLvl – m (monograph)
 - Ctry – pub place (state code+u) (this will match 300 field below)
 - LitF - 1 (fiction), 0 (non-fiction)
 - Desc – i (RDA record)
 - Ills – a (will match 300 field)
 - DtSt – pub date type. s (single date), r (reprint)
 - Date1 – date (will match 300 field)

(More comprehensive lists of these codes can be found at the [Library of Congress MARC 21 Formats](#) and the [OCLC Formats and Standards](#) websites.) In the Evergreen system, these codes can be modified in the Enhanced MARC editor as needed.

- **010 The Library of Congress control number**

010 †a2014501069

Pretty straight forward. We don't do anything to this number. Just know if you see a number here, that's what it means.

(Notice that starting with this tag, each delimiter has this symbol (†) in front of it. These are encoded spaces that the Missouri Evergreen system uses to help organize the information, also referred to as delimiters. Other popular symbols include a dollar sign (\$) or a backslash (\). These symbols can be different depending what ILS you are working in, but they all function the same. Each delimiter must have whatever symbol is used for that specific ILS. In ME, the patron view is this symbol (†) while in the MARC view, it changes to (\$.)

- **020 ISBN (International Standard Book Number)**

=020 †a9780553508734†q(boardbook)
 =020 †a0553508733†q(boardbook)

Notice this book has multiple ISBNs. As long as the content, format, size (within 3 cm), and page count (within 10 pages) are all the same, multiple ISBNs can be added to the same record. This field can be repeated for each valid ISBN for the resource in question.

The †a subfield is where the standard ISBN is entered.

Notice too that the †q delimiter is used to annotate the format on these ISBNs.

- **035** The OCLC code.

‡a(OCOLC)877843968

This is typically a complete record downloaded from OCLC. This becomes useful when merging records and overlaying records that we'll discuss later in the Advanced course.

- **040** The cataloger's library OCLC code.

040 ‡beng ‡erda

This is a three-letter OCLC library code that needs to be added to a record when it's been edited by an MEC cataloger. For example, my code is MEC. If I edited this MARC record, the string would look like this:

040 ‡beng ‡erda‡dmec

- **049** Local Holdings

This MARC tag is added by the cataloger with their OCLC code when a record has been imported or created. This should be a four-letter code. If your library code is only three letters, add an "A" to it. If I had imported or created this record from scratch, the subfield would look like this:

049 ‡aMECA

- **082** Dewey Classification number

082 00 ‡a[E] ‡223

The Dewey Classification system is typically used in public and K12 libraries. The Library of Congress Classification tag is **050**. This classification system is typically used in academic libraries.

- **100** The Author's name.

100 **1** ‡aStone, Jon. ‡0(ME)418245

The **1** indicator shows us that the name order is displayed as last name, first name. Use of this indicator is determined by the authorized version of the person's name.

The **‡0** delimiter points to the authority record in ME for this author.

Corporations can be included here as a solitary author (for example, a book issued by the American Heart Association) and would get a 110 tag instead of a 100 tag.

Note: ***Editors cannot be entered here!*** Editors can be added in the title field in the statement of responsibility subfield of the 245 tag and again in the 7xx field. However, they are not authors.

- **240 Uniform title.**

While our record doesn't have a 240 tag, I thought we should talk about it. I've seen this tag used for the original title of a work in a foreign language being translated into English, with the non-English title going here. I've also seen general titles added here, such as the Bible. This is not the information that goes in the 246 tag.

- **245 The title of the book/resource.**

245 14 \$a The monster at the end of this book : \$b starring lovable, furry old Grover / \$c by Jon Stone ; illustrated by Michael Smollin.

There is a lot of information to unpack here.

The title in this record has two indicators: "1" and "4" (245 14.) The first indicator "1" tells the computer that this is an added entry, meaning the desired title is the same as the title in this field. We can add a variant title name if needed in the 246 tag.

The second indicator tells the ILS how many letters or spaces to skip when searching and sorting the title. We don't want patrons to have to type in "A," "An," "The," etc. as part of their title search. The "4" indicator here tells the computer to skip 3 letters (the word "The") and one space (between the words "The" and "Monster") in the title, so 4 spaces in all. This indicator number is variable between 1-9. Not having this indicator in the 245 tag filled out correctly will cause a large amount of frustration from the patrons and the staff alike.

Next, the title with a subfield \$a (**\$a The monster at the end of this book :**) must be entered *exactly* as how it appears on the book or the resource in hand. No deviations or interpretations are allowed here.

Notice there is a space between "book" and the colon of the title (i.e. **book :**) There are always spaces between punctuation marks in a MARC field to aid with searching. The colon is only used if the book has a subtitle.

Subfield **b**: following the main title is a subtitle (**\$b starring lovable, furry old Grover /**). Again, like the title, this subtitle should be written exactly as it is shown on the book. Following the last word of the subtitle, include a space and a back slash (/). This sets up the next subfield which is...

Subfield **c**: the statement of responsibility. (**\$c by Jon Stone ; illustrated by Michael Smollin.**) Typically, this is going to be the author's name and possibly other names of contributors. In this example, we see both the author (Jon Stone) and the illustrator (Michael Smollin) listed. You can include their specific contribution if you want. Each contributor is separated by a space, a semi-colon and another space.

Cataloging rules allow all authors to be listed in `†c`. If there are numerous names, the total number may be listed in brackets [and 6 others]. The remaining authors/contributors can then be listed in the `7xx` field.

I've seen editors listed in this sub-field as well, which is fine as long as their role is mentioned i.e. edited by Roy Thomas or Editors: Roy Thomas, Don Glut for example. This is typically done on anthologies (edited by George R.R. Martin, for example on his "**Wild Cards**" series) or on textbooks where there might be numerous editors. Like above, `†c` can list all involved or you can use the shortcut [and 5 others] then list the remaining editors on the `7xx` field.

- **246 – Varying form of Title**

While not used in our record, I felt it was important to touch on this tag. As Catalogers we need to think about how someone might search for a resource. Let's look at the title "**101 Dalmatians**" as an example. There are a few ways this title shows up in a search:

1. The original title of the book is "**The Hundred and One Dalmatians**"
2. The Disney animated movie from 1961 is "**One Hundred and One Dalmatians.**"
3. The 1996 live action Disney movie is "**101 Dalmatians.**"

We know from our discussion of the `245` tag that the title of the resource has to be entered there **exactly** as the resource in hand indicates. However, that might not be how the patron searches for this book. To that end, we can slightly modify the title as follows in the `246` tag to account for numbers and symbols patrons might use in searching. For this example:

1a. For the original book, a second title might be "**The 100 and 1 Dalmatians,**" changing out the words for numbers.

1b. Another variant for the book's title might be "**The Hundred & One Dalmatians,**" changing out the word "and for an ampersand.

1c. A third variant book title might be "**The 100 & 1 Dalmatians,**" which combines both options.

List as many variants as you want. If I were to choose one to include in the `246` tag, it would be this one: "**The 100 & 1 Dalmatians.**"

- **264 Production, publication, Distribution, Manufacture and Copyright Notice**

`264 1 †a`New York : `†b`Golden Books, `†c`©2015.

This is the tag that shows where the item was published, the publisher, and the copyright date.

Subfield `†a` indicates the city the book was published. The country isn't needed here if the country code in the `008` fixed field is set correctly.

Subfield `†b` indicates the publisher's name followed by a comma and a space.

Subfield `⌘c` gives us either the publication date or the copyright date.

- **300 – Physical description**

`300 ⌘a1` volume (unpaged) : `⌘b`color illustrations ; `⌘c`21 cm

As the title says, this tag describes the physicality of the resource.

The `⌘a` subfield refers to the extent of the resource, such as number of physical pages, volumes, cassettes, total playing time, etc. There is a space between the last word of the description and the colon.

The `⌘b` subfield refers to illustrations (color or black and white), playing time, etc.

The `⌘c` subfield refers to dimensions, which can be expressed in centimeters, millimeters, or inches.

(Note: there are numerous `3xx` tags you can add to a resource that can describe it. As a minimum, the `300` tag is required for each record.)

The next three tags were introduced with RDA in 2009 to help more accurately describe non-book resources, such as CDs, DVDs, playaways, e-books, etc. The tags listed below are typical for printed books

- **336 – Content type**

`336 ⌘a`text `⌘b`txt `⌘2`rdaccontent

This describes the form of communication through which the item is expressed. Multiple content types should be recorded in separate 336 fields. This field can only contain values from those vocabularies found in the links below.

The `⌘a` subfield describes the type of work being described, such as performed music or two-dimensional moving image (a movie.) In our case, it describes text.

The `⌘b` subfield represents a code representing the media type of the work being described. These codes can be found at the Library of Congress [Term and Code List for RDA Content Types](#) website.

The `⌘2` subfield is the MARC for the resource being described. These source codes can be found on the Library of Congress' [Genre/Form Code and Term Source Code](#) website.

- **337 – Media type**

`337 ⌘a`unmediated `⌘bn` `⌘2`rdamedia

This tag reflects the general type of device required to view, play, run, etc. the content of the item. Multiple media types should be recorded in separate 337 fields. This field has a list of vocabularies that are linked to in the websites mentioned above.

Subfield **1a** describes the media type term. Examples include audio or video. Print books are unmediated. See the [RDA Media Type](#) webpage for these codes.

Subfield **1b** describes the media type code. These codes can be found on the [Term and Code List for RDA Media Types](#) webpage.

Subfield **12** (source) can be found on the same website listed in the **336** tag **12** explanation above.

- **338 – Carrier type**

338 **1a**volume **1bnc** **12**rdacarrier

This tag reflects the format of the storage medium and housing of carrier in combination with the media type. Multiple carrier types should be recorded in separate 338 fields. This field has a list of vocabularies that are linked to in the websites mentioned above.

Subfield **1a** describes the carrier type that the resource is on, such as audiodisc or videodisc. A list of codes can be found on the [RDA Carrier Type](#) webpage.

Subfield **1b** describes the carrier type code. In this case, NC stands for “no code.” Other codes can be found on [Term and Code List for RDA Carrier Types](#) webpage.

Subfield **12** (source) can be found on the same website listed in the **336** tag **12** explanation above.

- **490 – Series Statement**

490 **1** **1a**A little Golden Board book

This tag shows that this resource is part of a greater series.

The leading indicator **1** shows that the book is traced in the series and a corresponding **8xx** tag needs to be included. If the leading indicator is **0**, the **8xx** tags are not needed.

- **500 – General notes**

500 **1a**Publisher, publishing date and paging may vary.
500 **1a**At head of title: 123 Sesame Street.
500 **1a**Cover title.
500 **1a**On board pages.

These can be notes of interest or information that are not provided by the other MARC tags. Per the Missouri Evergreen best practices policy, when merging records with minor differences, a **500** tag will be added by the cataloger stating that “Publisher, publishing date and paging may vary.”

- **520 - Summary**

520 †aGrover worries page by page about meeting the monster at the end of this book.

Although not required, I'm a stickler for **adding a 520 summary tag and a summary to every resource!** Patrons can determine quickly if the resource in question is what they are looking for with a good summary. This is particularly helpful with resources with similar sounding titles or authors' names. Quick summaries can be found and copied from goodreads.com, Amazon, Barnes & Noble, and the publisher's webpage. Or you can write one yourself. Summaries – which are really business copy -- are not bound by copyright laws.

- **521 – Target audience note**

521 8 †aAD450L †bLexile

Again although not required, this tag can be used to define a specific audience for the work i.e. geologists, medical students, librarians, etc. MPAA ratings can be added to this field as well. Typically for MEC, these codes are added by MARCive and do not need to be added manually.

Subfield †a in our record is a Lexile reading code, the explanation of which can be found at the [Lexile Codes](#) webpage.

Subfield †b identifies the agency or entity assigning the information, Lexile in this example.

- **650 – Subject headings**

650 0 †aMonsters †vBoard books.
650 0 †aPuppets †vBoard books.

Another access point for patrons and librarians alike. If you can't find what you want, you might find something else that works just as well. The [OCLC Bibliographic Formats and Standards](#) site gives some great explanations of the various **6xx** fields you can use. Based on the record that we are dissecting, we'll look at the **650** tag, which is for a general topic. Generally speaking, the more subject headings you have (within reason) the easier it will be for the patrons to find similar items. At a minimum, please have at least three **6xx** tags per resource if possible.

The **0** indicator tells us these subject headings come from the Library of Congress Subject headings lists, the PDFs of which can be downloaded [here](#).

The †a subfield can be filled with a topical term or a geographic name. Click this [link](#) for more information on this tag's subfield.

The **tv** subfield can be used to define the genre and the format. It must be used in conjunction with the **ta** subfield, meaning you can't have one without the other.

- **7xx** – Added entry fields

```
700 1 taSmollin, Michael, teillustrator. t0(ME)394224
710 2 taRandom House (Firm) t0(ME)3307
730 0 taSesame Street (Television program) t0(ME)2376
```

Added entry fields can be used to define relationships or roles for others involved with the creation of the resource.

The **700** tag is a personal name added entry. In our example, we see that Michael Smollin is listed here as a personal name (defined by the **ta** subfield) with last name first as defined by the **1** indicator. The **te** subfield defines his contribution to the content. Multiple authors and editors can be listed with here by adding additional **700** tags, the **1** indicator, and the **ta** and **te** subfields.

The **710** tag is used to show a corporate name. The **2** indicator tells us the name of the corporation is in the direct order. The **ta** subfield shows the name of the corporation with the parenthesis showing the relationship to the resource, in this case (Firm.) The **t0** subfield indicates that corporation name is from an Authority record.

The **730** tag gives us the uniform titles of the resource. The **0** indicator tells the computer how many non-filing characters to skip when doing a search, similar to the explanation of the **4** indicator of the **245** tag. The **ta** subfield gives us an overall (uniform) title, in this case Sesame Street (Television program), the owners of Grover, the muppet. Like the **710** tag, the **t0** subfield indicates that the uniform title is from an Authority record.

- **800 & 830** – Series added entry fields

```
830 0 taLittle golden board book. t0(ME)568880
```

Because there was a **490** series tag in this record, it needed to have an additional **800** or **830** tag to go with it. The use of either tag depends on the information recorded in the authority record for that series. If it begins with the creator's name, you will use an **800** (formatted like a 100 or 700). If there is no personal name and just the title, you will use an **830**. For the **830**, The **0** indicator tells us there aren't any non-filing characters, just as in the explanation on the **730** tag and the **245** tag above.

Like the **730** tag, the **ta** subfield gives us an overall (uniform) title of the series. This should match the **490** tag. And as above, the **t0** subfield indicates that the uniform title is from an Authority record.

- **9xx** fields – Local information use.

```
904 taMARCIVE 2020
904 taMARCIVE 2020
```

This is where we can add some local information fields.

The 904 tag let us know that this record was vetted through MARCIVE. This is all done in the background server maintenance by Equinox monthly.

When merging or overlaying records in the catalog, the cataloger will add a 902 tag to indicate the following changes were made and by whom in the following format:

902 \$a(Library code)\$b(Date)\$c(Action)

This lets the rest of the libraries know who to contact if they have a question about the merged or the overlaid records. If I had merged this record with other ones in the ME catalog, the added tag would look like this:

902 \$aMEC\$b10/21/2021\$cmerged

Congratulations! You can now break down a MARC record!! Before you take a well-deserved break, let me reiterate one thing: you don't have to memorize any of this! You should have a general understanding of how MARC works with the tags, indicators, delimiters and subfields, which is what this exercise covers. More importantly, you need to know where to go to look up the information on these tags, whether it's this document, the Library of Congress' website for [MARC 21 format of bibliographic data](#) or the [OCLC Bibliographic Formats and Standards](#) website. You have the skills you need to make this work. And trust me when I say it's really a not as intimidating as it seems!

Important Websites

Again, I highly recommend you bookmark some of these links as we will be going back to them throughout this course.

1. [Library of Congress MARC 21 format for bibliographic data](#)

2. [OCLC bibliographic formats and standards](#)

3. [Library of Congress Authorities](#)

This is a searchable database of all authorized headings for subject, name, title, and series.

4. [Library of Congress Genre/Form terms](#)

List of all authorized genre headings. Some acronyms to know:

- **UF - Used For:** This leads the user from a non-preferred term to the authorized term
- **BT - Broader Term:** This is a specific list of controlled vocabularies in the broadest scope
- **NT - Narrower Term:** This is used hierarchically with the BT list and is a subgroup of the class represented by the BT

(Examples: Religious poetry, NT Psalms or Literature, NT Poetry)

- **RT - Related Term:** This indicates that a term might be of interest to the user because it is highly associated with the searched term
- **SN - Scope Notes:** definitions that help catalogers determine what term matches their material best. Can also help when terms are closely related in meaning.

5. [Library of Congress Subject headings](#)

- This page provides print-ready PDF files for the 43rd Edition of the Library of Congress Subject Headings (LCSH). Data for the 43rd edition was selected in April 2021.

6. [MARC 21 code list for geographic areas](#)

- [Code sequence](#) – This is used for the 043 field
- [Name sequence](#) – This is used for 008/Ctry (Country) code

7. [OCLC Classify](#)

- A great place to look up non-fiction Dewey numbers.

8. [Worldcat](#)

- OCLC's OPAC which can be used to find resource information and owning libraries.

9. [Amazon](#)

- Another great place to get information on resources, including self- published items.

Evergreen keyboard short cuts

Keyboard shortcuts are always handy, hence their inclusion here.

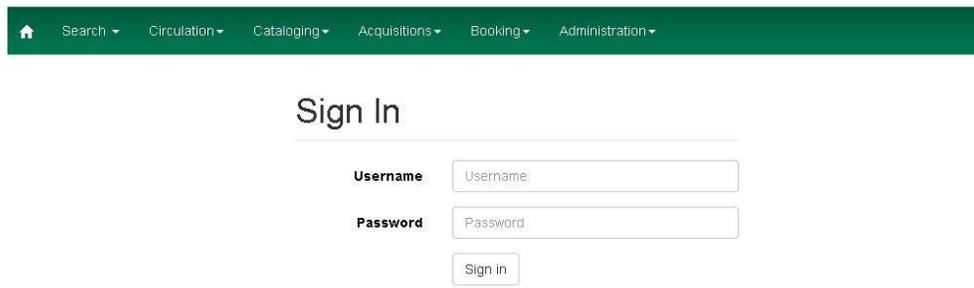
Access Key Assignments ✕			
Command	Action	Context	Active?
sh ft+f3	Retrieve Last Bib Record	navbar	Yes
sh ft+f3	Retrieve Bib Record by TCN	navbar	Yes
f5	Navigate To Item Status	navbar	Yes
f3	Catalog	navbar	Yes
f9	Reprint Last Receipt	navbar	Yes
f6	Record In-House Use	navbar	Yes
f8	Retrieve Last Patron	navbar	Yes
sh ll+f11	Register Patron	navbar	Yes
ctrl+f2	Renew Items	navbar	Yes
sh ft+f2	Create Holds	navbar	Yes
f2	Check in	navbar	Yes
f11	Checkout	navbar	Yes
f4	Patron Search	navbar	Yes
alt+s	Patron Search	navbar	Yes
alt+h	Navigate Home	navbar	Yes
shift+f10	Display Context Menu	base	Yes
ctrl+I	Display AccessKey Info Dialog	base	Yes

If an assignment is not active, it means it was superseded by an assignment from a different context using the same keyboard shortcut.

Missouri Evergreen Test Server (for practical work)

Once you've gotten permission to catalog, please sign into the [Missouri Evergreen Test Server](https://test.missourievergreen.org/eg/staff) with your credentials. (Ensure you're in the right server; the URL begins with https://test. The URL is test.missourievergreen.org/eg/staff) This is the server where we will do all of the practice work. Practicing and making changes here does not affect the real-world server.

The login page should look like this:



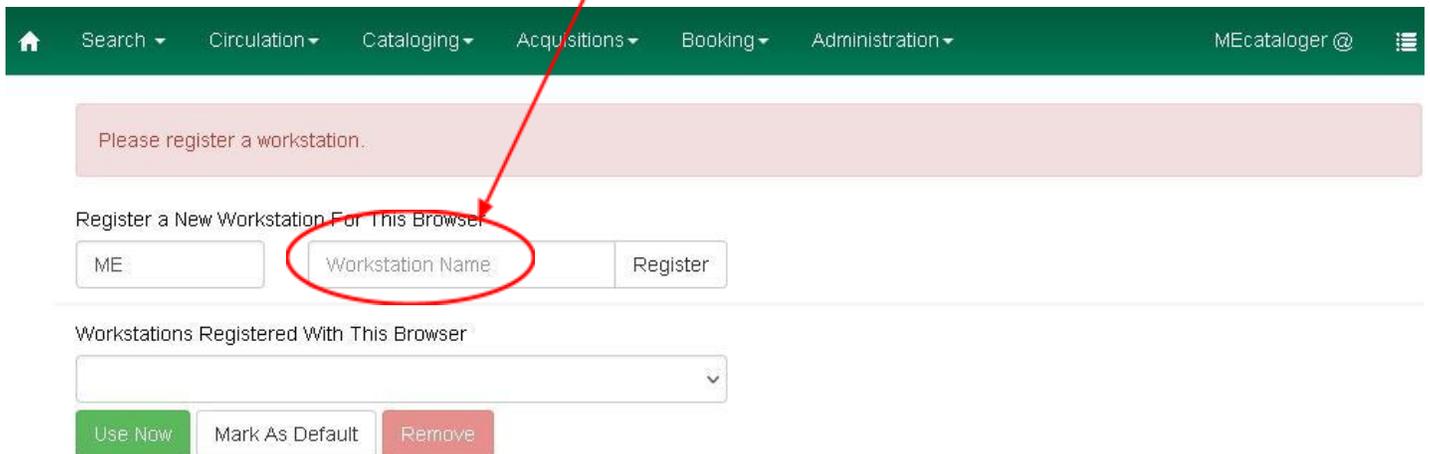
Search ◯ Circulation ◯ Cataloging ◯ Acquisitions ◯ Booking ◯ Administration ◯

Sign In

Username

Password

Once you sign in, you will be prompted to register a workstation:



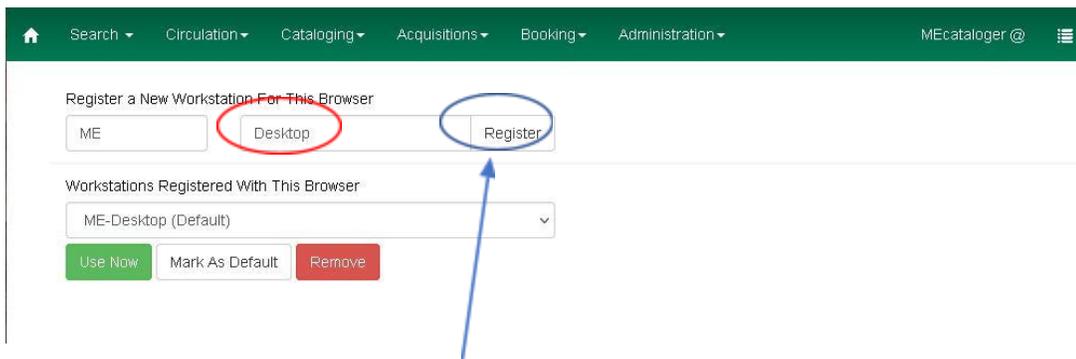
Search ◯ Circulation ◯ Cataloging ◯ Acquisitions ◯ Booking ◯ Administration ◯ MEcataloger @

Please register a workstation.

Register a New Workstation For This Browser

Workstations Registered With This Browser

Give the workstation you are at a name. It can be your library name, your name, the computer or laptop you on, your pet's name, anything you like. I've named mine "Desktop," since that's where I do the majority of my work and I'm a firm believer in truth-in-advertising.



Once you type in a name, click **“Register.”**

After you register the workstation, it should set the WS name to **“Default.”**

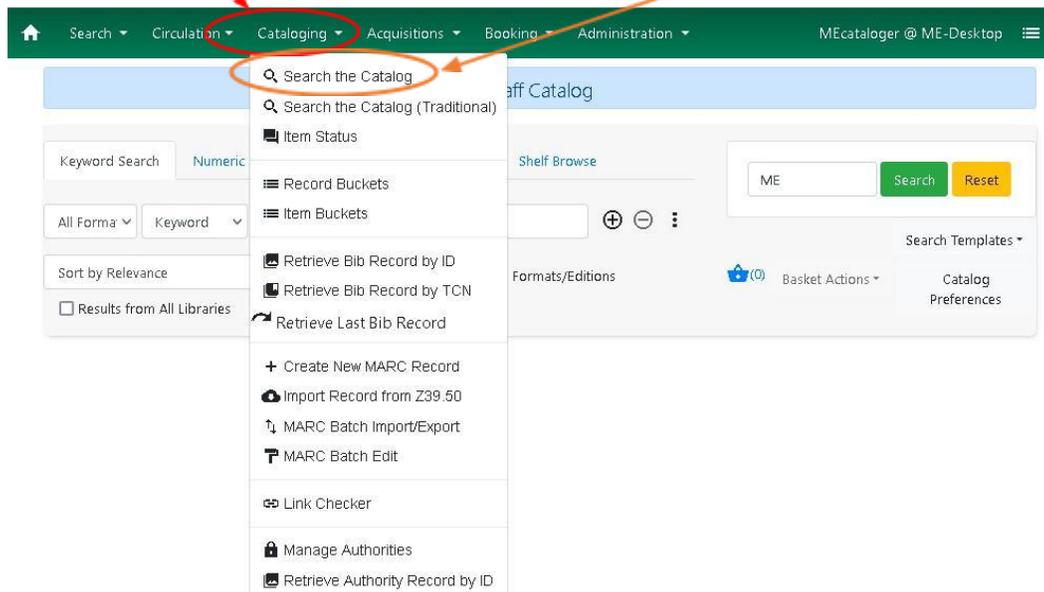
Now click on the **Use Now** button. The system may ask you to sign in again. Once in, you should see the ME Staff home page:



Note: one item you may have to check while using the Evergreen system is the pop-up blocker for the specific browser you are using. You will need to allow all pop-ups from Evergreen, both in the test server and in the real-world server. Both sites should be unblocked on your pop-up blocker.

Searching the catalog

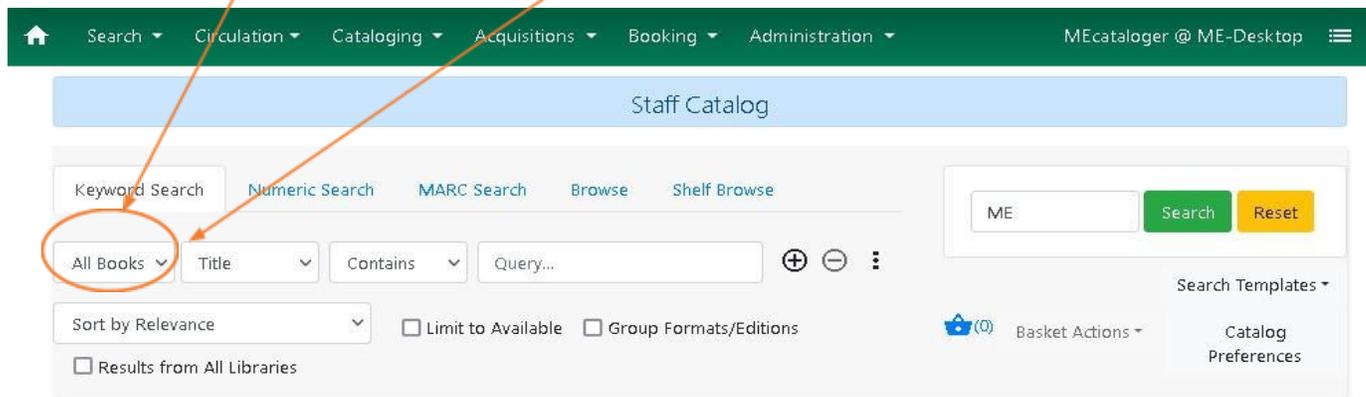
Now that we're in the catalog, let's do a search and add some holding information. We do this by going into the "Cataloging" tab at the top of the screen and selecting "Search the Catalog" from the dropdown menu.



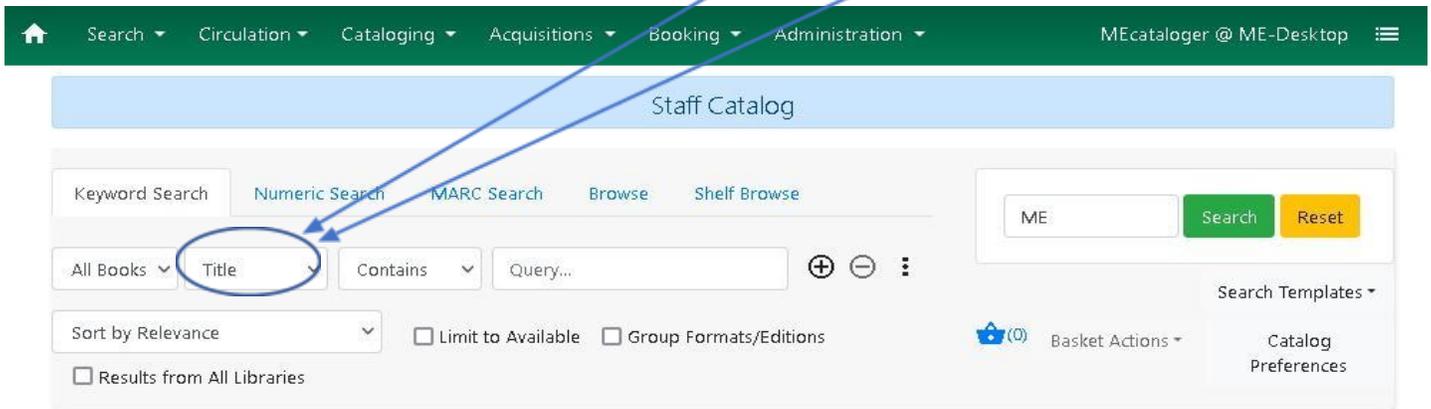
Note: there are several ways in the Evergreen ILS to do a specific task. I'm going to show my method for working in the system. Your methods may work just as well.

That brings up the search page. For this exercise, find for the book from the MARC record discussion above: "The monster at the end of this book."

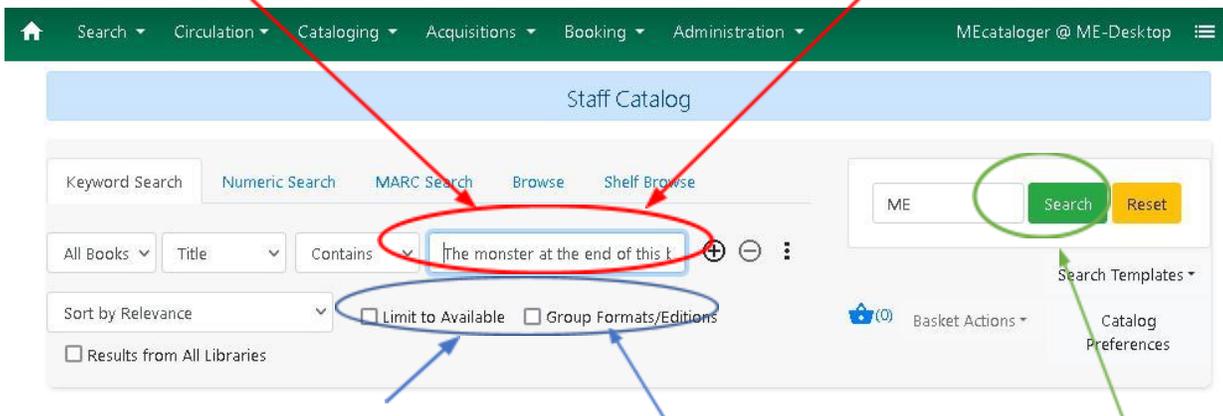
First, set the "All Format" dropdown to "All Books," since that's the format we want to look at.



Next, I'm going to limit the second dropdown from "Keyword" to "Title" to further reduce our choices.



Finally, in the "Query" field, I'm going to type in the title **The monster at the end of this book**:



Uncheck the "Limit to Available" and "Group Formats/Editions" for the widest search in MEC.

Then, click on the "Search" button.

You should get the following result. Click on the title of the first record.



Keyword Search Numeric Search MARC Search Browse Shelf Browse

ME Search Reset

All Books Title Contains monster at the end of this book + - :

Sort by Relevance Limit to Available Group Formats/Editions Results from All Libraries 0 Basket Actions Catalog Preferences

Search Results (39) Select 1 - 10 Show More Details « 1 2 3 4 »

Personal Author	
Stone, Jon	8
McManus, Karen M.	2
Oppenheimer, Jerry	2
Rair, Dairden	1

1. **The monster at the end of this book.** 1 / 1 items @ ME TCN: 4372998 Created 9/29/21 by admin

Stone, Jon. Database ID: 4372998 Last Edited By: admin

Book Holds: 0 Edited 9/29/21 by admin Place Hold

Call Number: E STO white

Phys. Desc: print, 24p. : col.ill. 26 cm

Publisher: New York, NY : Golden Books 2004.

ISBN: 037582913X

Here's the record summary and holding record for this specific library. Notice on this screen are some of the terms that we discussed earlier:

Show Search Form

Record Summary Book

	Title: The monster at the end of this book.	Edition:	TCN: 4372998	Created By: admin
	Author: Stone, Jon.	Pubdate: 2004	Database ID: 4372998	Last Edited By: admin
	Bib Call #:	Record Owner:	Created On: 9/29/21, 12:12 PM	Last Edited On: 9/29/21, 12:12 PM

Start Previous Next End Back to Results (1 / 39) Patron View Place Hold Add Holdings Serials Mark For... Other Actions

Monograph Parts Set Default View

Item Table **MARC Edit** MARC View View Holds **Monograph Parts** **Holdings View** Conjoined Items Shelf Browse

Call number

#	Location	Call Number / Item Notes	Part	Barcode	Shelving Location	Circulation Modifier	Age Hold Protection	Active/Cre... Date	Holdable?	Status	Due Date
1	CEDAR-ELDO	E STO white		00026348 View Edit	Easy	Books		08/15/2013	Item Hold Call Number Ho	Available	

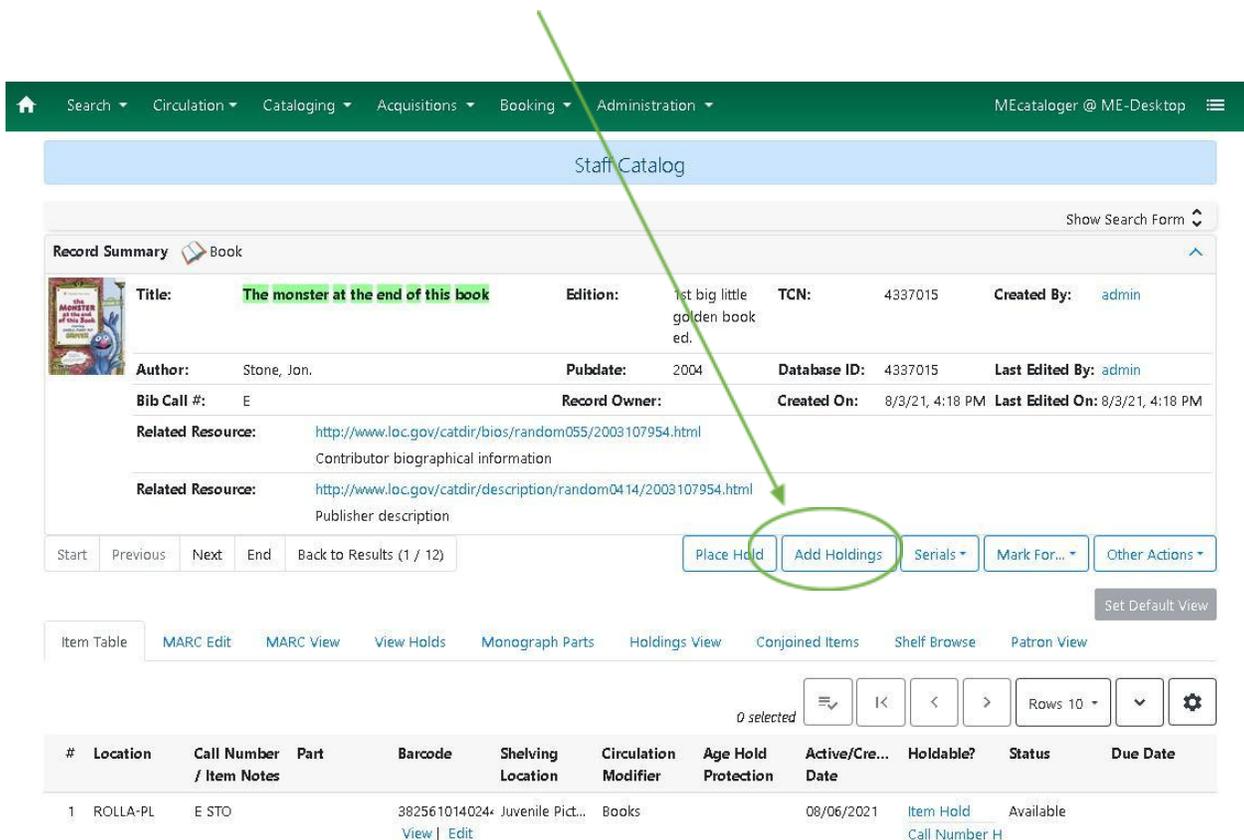
Library shortcode **Barcode** **Holdings View**

We will be accomplishing the majority of our work on this screen so please be familiar with it.

For accessing the server and doing a basic search, please watch the [Basic Cataloging Video #1](#)

Adding Holdings

The holding record has several parts, most of which are self-explanatory. We're going to add a new holding to this record. To do that, click on the "Add Holdings" button.



The screenshot shows the Staff Catalog interface for a book record. The record details include:

- Title:** The monster at the end of this book
- Edition:** 1st big little golden book ed.
- TCN:** 4337015
- Created By:** admin
- Author:** Stone, Jon.
- Pubdate:** 2004
- Database ID:** 4337015
- Last Edited By:** admin
- Bib Call #:** E
- Record Owner:**
- Created On:** 8/3/21, 4:18 PM
- Last Edited On:** 8/3/21, 4:18 PM

Below the record details, there are navigation buttons: Start, Previous, Next, End, Back to Results (1 / 12), Place Hold, Add Holdings (circled in green), Serials, Mark For..., and Other Actions. A green arrow points from the text above to the 'Add Holdings' button.

At the bottom, there is a table with the following columns: #, Location, Call Number / Item Notes, Part, Barcode, Shelving Location, Circulation Modifier, Age Hold Protection, Active/Cre... Date, Holdable?, Status, and Due Date. The table contains one row:

#	Location	Call Number / Item Notes	Part	Barcode	Shelving Location	Circulation Modifier	Age Hold Protection	Active/Cre... Date	Holdable?	Status	Due Date
1	ROLLA-PL	E STO		382561014024	Juvenile Pict...	Books		08/06/2021	Item Hold Call Number H	Available	

From there the "Holdings Editor" screen appears. Our first task is to find the library that we are adding a holding to by looking in the "Owning Library" list. For this example, I'm going to choose Rolla-PL.



MEcataloger @ ME-Desktop

Record Summary (MARC)

Title: The monster at the end of this book **Edition:** 1st big little golden book ed. **TCN:** 4337015 **Created By:** admin

Author: Stone, Jon. **Pub Date:** 2004 **Database ID:** 4337015 **Last Edited By:** admin

Bib Call #: E **Record Owner:** **Last Edited On:** 8/3/2021 4:18 PM

Edit Item Templates Defaults

Hide Holdings Details Hide Item Attributes

Batch Apply Apply

Owning Library	Call Numbers	Classification	Prefix	Call Number Label	Suffix	Items	Barcode	Item #	Part
ME	1	Generic		E		1			

ME Add call number

Working Items Completed Items

Template Apply Clear

Circulate? **Status** **Circulating Library** **Reference?**

Yes No ME Yes No

Then I'm going to add a **different call number** – just to show proof of concept – and add a barcode. For our training, we will use the barcodes starting with **Train001**.

Record Summary (MARC)

Title: The monster at the end of this book **Edition:** 1st big little golden book ed. **TCN:** 4337015

Author: Stone, Jon. **Pub Date:** 2004 **Database ID:** 4337015

Bib Call #: E **Record Owner:**

Edit Item Templates Defaults

Hide Holdings Details Hide Item Attributes

Batch Apply Apply

Owning Library	Call Numbers	Classification	Prefix	Call Number Label	Suffix	Items	Barcode
ROLLA-PL	1	Generic		E FIC MON		1	Train001

ME Add call number

From here, scroll down to the Holdings Editor:

Working Items Completed Items

Template Apply

Circulate? <input checked="" type="radio"/> Yes <input type="radio"/> No	Status <input type="text" value="Available"/>	Circulating Library <input type="text" value="ROLLA-PL"/>	Reference? <input type="radio"/> Yes <input checked="" type="radio"/> No
Shelving Location <input type="text" value="Stacks (ME)"/>	OPAC Visible? <input checked="" type="radio"/> Yes <input type="radio"/> No	Circulation Modifier <input type="text" value="Books"/>	Price <input type="text" value="0"/>
Loan Duration <input type="text" value="Normal"/>	Acquisitions Cost <input type="text"/>	Circulate as Type <input type="text" value="Books"/>	Holdable? <input checked="" type="radio"/> Yes <input type="radio"/> No
Deposit? <input type="radio"/> Yes <input checked="" type="radio"/> No	Deposit Amount <input type="text" value="0"/>	Age-based Hold Protection <input type="text" value="<NONE>"/>	Quality <input checked="" type="radio"/> Good <input type="radio"/> Damaged

Each of these fields are modifiable depending on the library's need and the status of the item at the point of cataloging. As a rule, the settings show here – except for the circulating library, which should be the cataloger's library – will need to be filled out for each individual item.

Once you've finished modifying these fields per the video, scroll to the bottom of the screen:

The screenshot shows a grid of 12 dropdown menus, each with a light blue header and a white body containing '<NONE>'. The headers are: 'Sikeston Public : Spotlight on Literacy', 'Sikeston Public : SummerReadingGrant17', 'Sikeston Public Library : A&E', 'Sikeston Public Library : CollDev-CDB', 'Sikeston Public Library : CollDev-GN', 'Sikeston Public Library : CollDev-NF', 'Sikeston Public Library : CollDev-UF', 'Sikeston Public Library : CollectionDevelopmentGrant', 'Sikeston Public Library : SRP16-Juvenile', 'Sikeston Public Library : SRP16-YA', 'Sikeston Public Library : SummerReadingGrant', and 'Wright County : Y non fiction'. At the bottom left, there are two buttons: 'Store Selected' and 'Save & Exit'. The 'Save & Exit' button is circled in blue, and a blue arrow points to it from below.

And click on "Save & Exit."

This refreshes the screen to the Main Holdings screen:

The screenshot shows the 'Staff Catalog' interface. At the top, there is a navigation bar with 'Search', 'Circulation', 'Cataloging', 'Acquisitions', 'Booking', and 'Administration' menus. The main content area is titled 'Record Summary' and shows details for the book 'The monster at the end of this book' by Stone, Jon. Below the record summary, there are navigation buttons: 'Start', 'Previous', 'Next', 'End', 'Back to Results (1 / 12)', 'Place Hold', 'Add Holdings', 'Serials', 'Mark For...', and 'Other Actions'. A 'Set Default View' button is also present. Below the navigation buttons, there are tabs for 'Item Table', 'MARC Edit', 'MARC View', 'View Holds', 'Monograph Parts', 'Holdings View', 'Conjoined Items', 'Shelf Browse', and 'Patron View'. The 'Item Table' tab is selected, and it displays a table with the following columns: '#', 'Location', 'Call Number / Item Notes', 'Part', 'Barcode', 'Shelving Location', 'Circulation Modifier', 'Age Hold Protection', 'Active/Cre... Date', 'Holdable?', 'Status', and 'Due Date'. The first row of the table has the following values: '# 1', 'Location ROLLA-PL', 'Call Number / Item Notes E FIC MON', 'Part', 'Barcode Train001', 'Shelving Location Stacks', 'Circulation Modifier Books', 'Age Hold Protection', 'Active/Cre... Date 10/20/2021', 'Holdable? Item Hold', 'Status In process', and 'Due Date'. The 'Call Number / Item Notes' and 'Barcode' fields in the first row are circled in red, and green arrows point to them from below.

The holding now has a new call number and a new barcode.

In addition to this short explanation, please watch this [Basic Cataloging Video 2](#).

Creating and using holding templates

Another great feature in the ME system is the ability to create templates. Templates can help you streamline holdings by taking a format and applying some standard values to it. This saves time when you are adding holdings.

Let's assume we are adding a holding in the Holdings Editor, but we don't want to fill out each field individually:

The screenshot shows the Holdings Editor interface. At the top, there are several fields: Owning Library (ME), Call Numbers (1), Classification (Generic), Prefix (dropdown), Call Number Label ([E]), Suffix (dropdown), Items (dropdown), Barcode (empty), Item # (dropdown), and Part (dropdown). Below these fields, there are buttons for 'ME' and 'Add call number'. Further down, there are tabs for 'Working Items' and 'Completed Items'. At the bottom, there is a 'Template' dropdown menu, an 'Apply' button, and a 'Clear' button.

When I went through the above exercise, I went through each of these modifiable fields manually one at a time. But if my library has certain norms for a holding, I can create a template to automate that process.

To build a specific template, click on **Item Templates**:

The screenshot shows the Item Templates interface. It features a table with the following data:

Title:	The monster at the end of this book : starring lovable, furry old Grover	Edition:		TCN:	2585123
Author:	Stone, Jon.	Pub Date:	2015	Database ID:	2585123
Bib Call #:	[E]	Record Owner:			

Below the table, there are buttons for 'Edit', 'Item Templates' (circled in blue), and 'Defaults'.

In the Template field, type in your specific library. In this case, I'm going to add a holding to the Ray County Library. Their library abbreviation is RAY-CL, which I'll type into the template field. I'm also going to identify which section of the library this holding is going into, namely Junior Fiction. Below is the final name for this template:

Template RAY-CL J FIC ▼

Then, I go through each field and fill in a predetermined value. Since I want the item to circulate, I'm changing the **Circulate?** option to yes:

Circulate?

Yes

No

Next is **Status**. There are a view options here that you can see via the dropdown:

Status

▼

- Available
- Bindery
- Canceled Transit
- Cataloging
- Checked out
- Claimed Lost
- Damaged
- Discard/Weed
- ILL
- In process
- In transit
- In-Library Use
- Long Overdue
- Lost
- Lost and Paid

For this resource, I want it available to my patrons, so I'm selecting **"Available."**

Next under the **"Circulating Library"** option, this needs to be the specific library the holding is being add to, with this code matching the name I used for the template. You can find this quickly by typing the first few letters of the library name:

Circulating Library

In the next field, we decide if the resource we're adding is a reference book. For this template, the answer is "No."

Reference?

Yes No

The next field is the "Shelving Location." In this field, we want to direct both patrons and the staff to the location where the resource is shelved. Most libraries have very specific locations, so look through the list and make sure you are selecting your library's correct location. In this case, I searched the list and found the shelving location for Juvenile fiction at Ray:

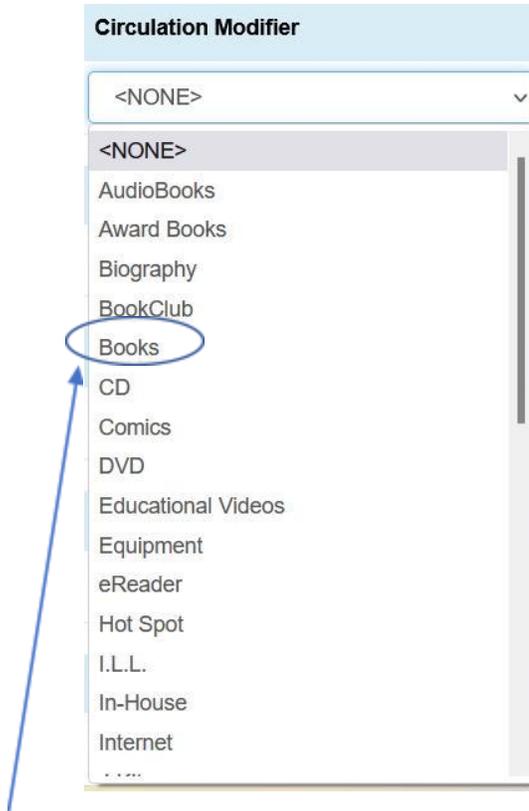
Shelving Location

In the next field, I select "Yes" to make this resource visible in the OPAC:

OPAC Visible?

Yes No

The next field is the **"Circulation Modifier."** This represents the type of resource I'm adding, which you find by clicking on the dropdown arrow:



For this resource, I selected **"Books:"**

Following this **"Price."** For this field I put in the price of the unit or the price I would expect a patron to pay for replacing the item, including process charges. Your library will have specific amounts for this field, so be sure to follow your local policy. At this library (this is just an example) the amount is 15.

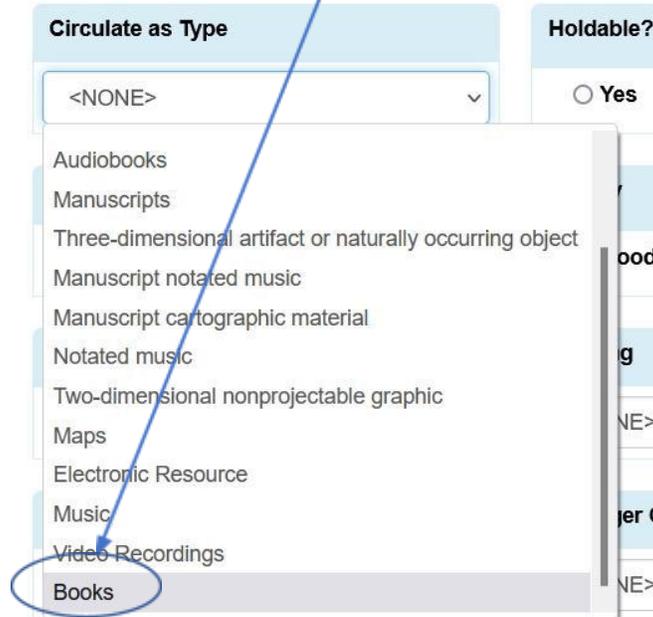
A screenshot of a web form titled "Price". The field is a text input box with a light blue header and a white background. The number "15" is entered in the box. There is a small dropdown arrow on the right side of the box. The entire field is highlighted with a green border.

The next field is **"Loan Duration."** For most items the standard is **"Normal"**:

A screenshot of a web form titled "Loan Duration". The dropdown menu is open, showing the option "Normal". The dropdown menu has a light blue header and a white background with a scrollbar on the right. The entire field is highlighted with a green border.

I've left the **"Acquisitions Cost"** blank. Your library made decide a cost needs to be added to this field.

The next field is **"Circulate as Type."** This tells the system what circulation rules follow for this type of holding. Again, from the options available, I'm going to choose **"Books."**



The screenshot shows a form with two main sections. The first section is titled "Circulate as Type" and contains a dropdown menu currently set to "<NONE>". The dropdown menu is open, displaying a list of options: Audiobooks, Manuscripts, Three-dimensional artifact or naturally occurring object, Manuscript notated music, Manuscript cartographic material, Notated music, Two-dimensional nonprojectable graphic, Maps, Electronic Resource, Music, Video Recordings, and Books. The "Books" option is highlighted with a blue circle. A blue arrow points from the text "I'm going to choose 'Books.'" to this circle. To the right of the dropdown is a section titled "Holdable?" with a radio button next to the word "Yes".

Next, determine if a patron can put a hold on the resource. For this resource, the answer is **"Yes."**



The screenshot shows a form titled "Holdable?". Below the title are two radio buttons: "Yes" and "No". The "Yes" radio button is selected, indicated by a blue dot in the center.

The next field determines if the resource needs a deposit for a patron to check it out. While that might be true in some instances – equipment maybe – the standard answer is **"No."**



The screenshot shows a form titled "Deposit?". Below the title are two radio buttons: "Yes" and "No". The "No" radio button is selected, indicated by a blue dot in the center.

If you chose **"No"** for the previous field, leave the **"Deposit Amount"** field blank.

The **"Age Based Hold Protection"** field allows a library to designate certain books from being lent to another library. Some libraries use a 3-month hold for all new books and best sellers, for instance. In this case, I'm leaving it at the default which is **<NONE>**.



The screenshot shows a light blue header box with the text "Age-based Hold Protection". Below the header is a white dropdown menu with a downward-pointing arrow on the right. The text "<NONE>" is displayed inside the dropdown.

The next field is **"Quality"**. At the time of cataloging is the resource in good shape? For my example, the answer is **"Good."**



The screenshot shows a light blue header box with the text "Quality". Below the header is a light green area containing two radio buttons. The first radio button is selected and is followed by the text "Good". The second radio button is unselected and is followed by the text "Damaged".

The **"Fine Level"** should be normal.



The screenshot shows a light blue header box with the text "Fine Level". Below the header is a white dropdown menu with a downward-pointing arrow on the right. The text "Normal" is displayed inside the dropdown.

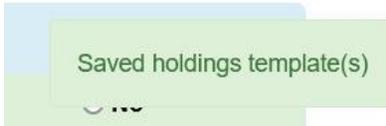
At this point there are other fields that can be filled out on a case-by-case basis (**Item Notes, Item Tags, Item Alerts**, etc.) but for the creation of this template, I'm going to leave them blank. Also, some fields may be required for your specific library. Whatever the case, check your local policies.

After filling the remaining fields as needed, go back to the top of the screen click where the template name is on **"Save."**



The screenshot shows a light blue navigation bar at the bottom of the screen. It contains several elements: the word "Template", a dropdown menu showing "RAY-CL J FIC", an "Apply" button, a "Save" button circled in blue, and a "Delete" button. A blue arrow points from the text above to the "Save" button.

If the template saves correctly, you should get this message in the lower right-hand corner of the screen:



All of the field changes you made are now permanently in this template. From here, select the **Edit** button just above the template name:

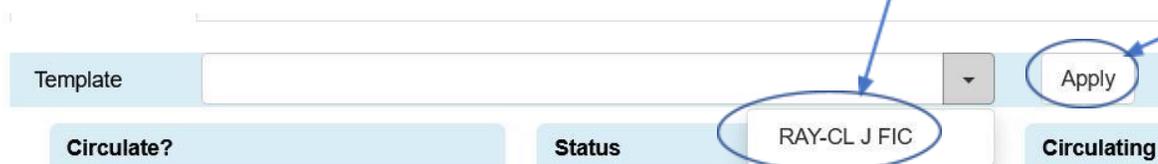


That takes you back to the holding page. Here, I've added the owning library, the classification, the call number and the barcode:

Owning Library	Call Numbers	Classification	Prefix	Call Number Label	Suffix	Items	Barcode
RAY-CL	1	Generic		E STO		1	Train017

Now I'll click on the **Template** dropdown arrow and find the template I created earlier.

Then I click on **Apply.**



That will now populate all the fields we just filled in automatically:

Working Items | Completed Items

Template: RAY-CL J FIG [Apply] [Clear]

Circulate? <input checked="" type="radio"/> Yes <input type="radio"/> No	Status Available	Circulating Library RAY-CL	Reference? <input type="radio"/> Yes <input checked="" type="radio"/> No
Shelving Location Juvenile Fiction (RAY-CL)	OPAC Visible? <input checked="" type="radio"/> Yes <input type="radio"/> No	Circulation Modifier Books	Price 15
Loan Duration Normal	Acquisitions Cost 0	Circulate as Type Books	Holdable? <input checked="" type="radio"/> Yes <input type="radio"/> No
Deposit? <input type="radio"/> Yes <input checked="" type="radio"/> No	Deposit Amount 0	Age-based Hold Protection <NONE>	Quality <input checked="" type="radio"/> Good <input type="radio"/> Damaged

Fine Level Normal	Item Notes Item Notes	Item Alerts Item Alerts	Floating <NONE>
Item Tags View/Edit Item Tags	Statistical Categories Filter by Library	Bollinger County : Foundation grant2018 <NONE>	Bollinger County : Grants <NONE>
Caruthersville Public : Grant <NONE>	Cedar County : Donor <NONE>	Crawford County : <NONE>	De Soto : Autographed <NONE>
Sikeston Public Library : CollDev-GN <NONE>	Sikeston Public Library : CollDev-NF <NONE>	Sikeston Public Library : CollDev-UF <NONE>	Sikeston Public Library : CollectionDevelopmentGrant <NONE>
Sikeston Public Library : SRP16-Juvenile <NONE>	Sikeston Public Library : SRP16-YA <NONE>	Sikeston Public Library : SummerReadingGrant <NONE>	Wright County : Y non fiction <NONE>

Store Selected | **Save & Exit**

Barcode	Created	Creator	Activated	Edited	Editor	Call Number
<input checked="" type="checkbox"/>	Train017					E STO

Once you've applied the template, scroll to the bottom of the page and click on **"Save and exit."**

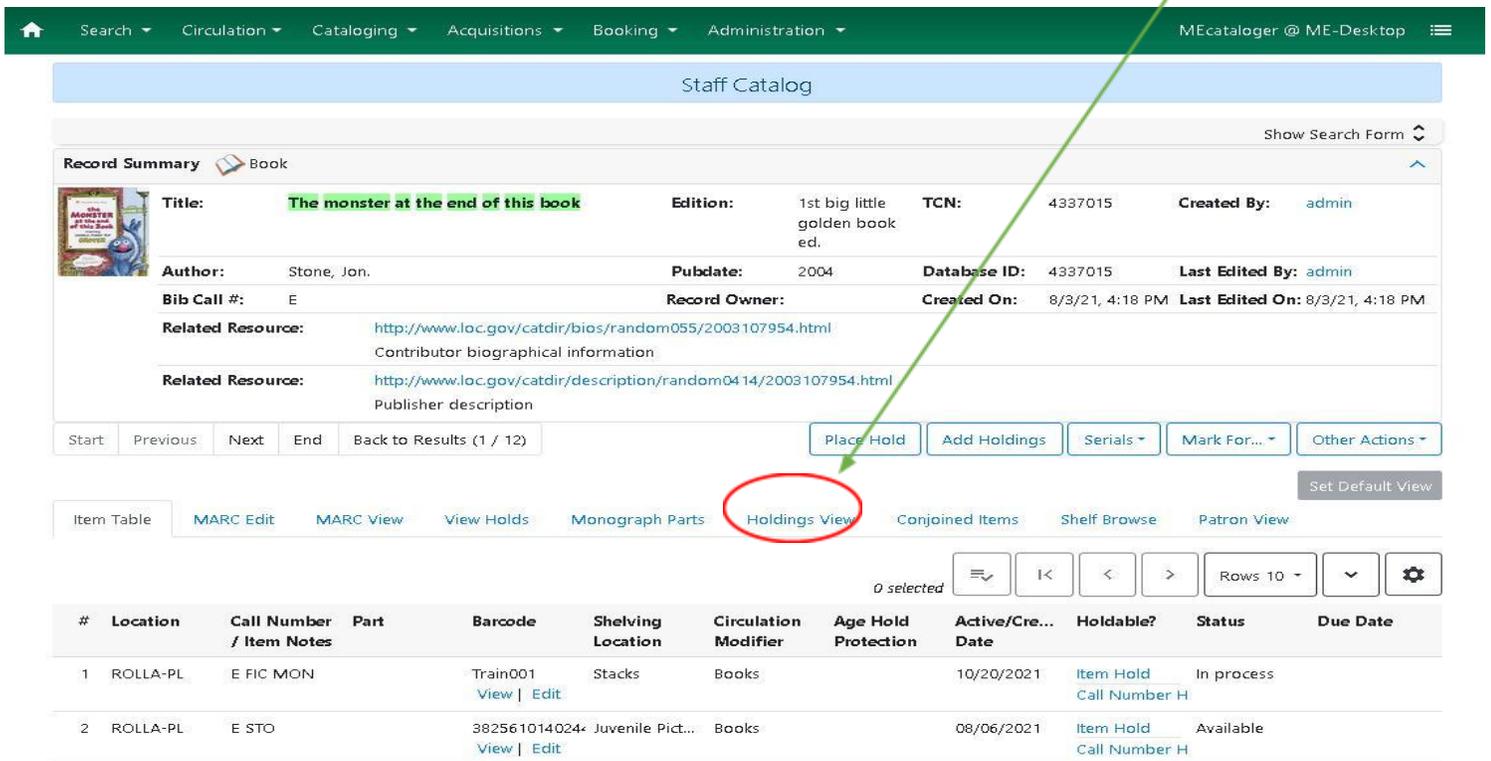
If you are adding multiple copies of the same resource, you can apply this template to all of them at once.

You can create templates for any format or any type of resource using these instructions. Once applied it makes loading a holding much quicker. Templates can also be edited or deleted as needed.

To watch this process, please watch the [Basic Cataloging Video 3](#).

Changing barcodes

Now let's change an existing barcode. Start at Main Holdings screen, then click on "Holdings View."



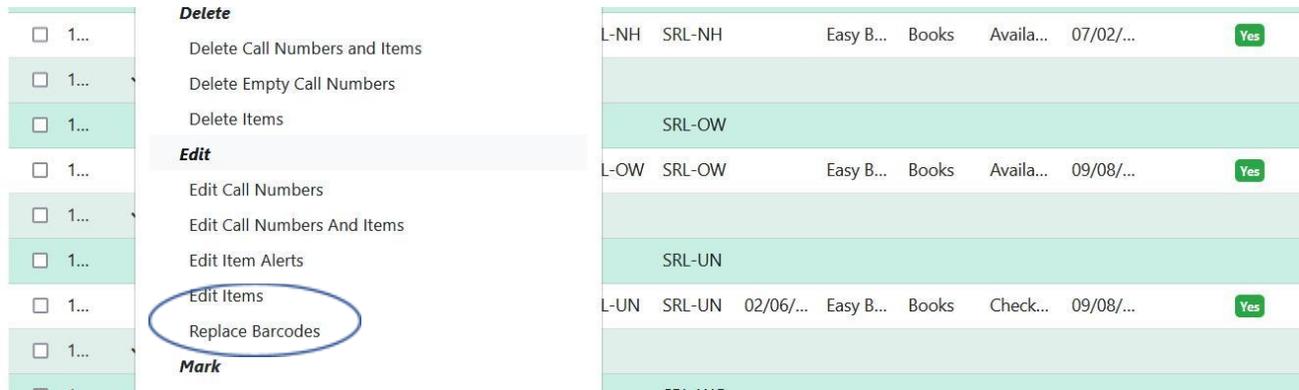
The screenshot shows the Staff Catalog interface. The top navigation bar includes Search, Circulation, Cataloging, Acquisitions, Booking, and Administration. The main content area displays a record summary for the book "The monster at the end of this book" by Stone, Jon. Below the record summary, there are navigation buttons: Start, Previous, Next, End, Back to Results (1 / 12), Place Hold, Add Holdings, Serials, Mark For..., and Other Actions. The 'Holdings View' tab is selected and circled in red. Below the tabs, there is a table with columns: #, Location, Call Number / Item Notes, Part, Barcode, Shelving Location, Circulation Modifier, Age Hold Protection, Active/Cre... Date, Holdable?, Status, and Due Date. The table contains two rows of holdings data.

#	Location	Call Number / Item Notes	Part	Barcode	Shelving Location	Circulation Modifier	Age Hold Protection	Active/Cre... Date	Holdable?	Status	Due Date
1	ROLLA-PL	E FIC MON		Train001 View Edit	Stacks	Books		10/20/2021	Item Hold Call Number H	In process	
2	ROLLA-PL	E STO		382561014024+ Juvenile Pict... View Edit		Books		08/06/2021	Item Hold Call Number H	Available	

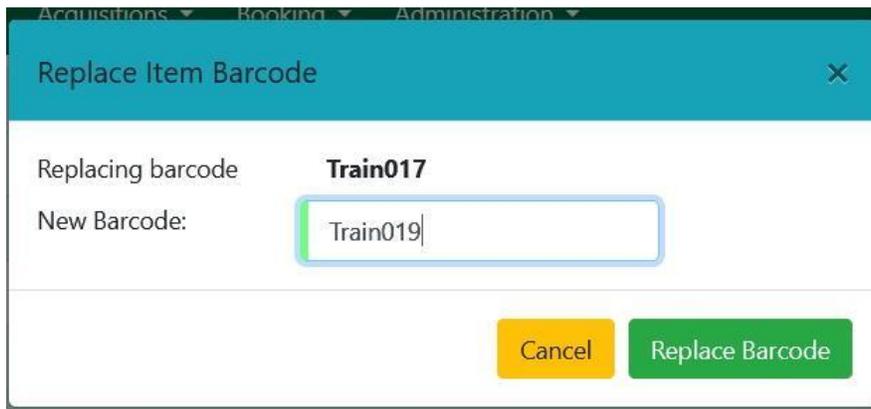
Under the Holdings screen, scroll through the list until you find your library and the barcode you want to change:

<input type="checkbox"/>	88	345310		BB STO	34531...	PLK-BO	PLK-BO	Board ...	Books	Availa...	12/18/...	No
<input type="checkbox"/>	89	RAY	1	2								
<input checked="" type="checkbox"/>	90	RAY-CL	1	2								
<input type="checkbox"/>	91	E STO	2	E STO			RAY-CL					
<input type="checkbox"/>	92	Train01		E STO	Train017	RAY-CL	RAY-CL	Juvenil...	Books	Availa...	02/01/...	Yes
<input type="checkbox"/>	93	Train01		E STO	Train018	RAY-CL	RAY-CL	Juvenil...	Books	Availa...	02/01/...	Yes
<input type="checkbox"/>	94	RR	1	1								

Click on the box near the barcode you want to change, then right-mouse click. Scroll down the list until you find **“Replace barcodes”**:



That brings up the next screen:



Enter the new barcode then click **“Replace Barcode.”** If the change was successful, the system will take you back to the **“Holdings View”** page where you can see if the change took effect:

<input type="checkbox"/>	92	Train01	E STO	Train018	RAY-CL	RAY-CL	Juvenil...	Books	Availa...	02/01/...	Yes
<input type="checkbox"/>	93	Train01	E STO	Train019	RAY-CL	RAY-CL	Juvenil...	Books	Availa...	02/01/...	Yes

There's also another way to do this. Start at the **“Item Table”** Screen. Search for your library then click on **“View:”**



[View](#) | [Edit](#)

30	RAY-CL	E STO	Train018	Juvenile Fic...	Books	02/01/2022	Item Hold	Available
			View Edit				Call Number	
31	RAY-CL	E STO	Train019	Juvenile Fic...	Books	02/01/2022	Item Hold	Available
			View Edit				Call Number	

This brings up the item status screen.

Scan Item

Search Submit OR Browse... No file selected. Actions List View

Record Summary (MARC)

Title:	The monster at the end of this book	Edition:	1st big little golden book ed.	TCN:	4337015	Created By:	admin
Author:	Stone, Jon.	Pub Date:	2004	Database ID:	4337015	Last Edited By:	admin
Bib Call #:	E	Record Owner:		Last Edited On:	8/3/2021 4:18 PM		

Quick Summary Recent Circ History Circ History List Holds / Transit Cataloging Info Triggered Events

Barcode	Train001	Circ Library	ROLLA-PL	Call # Prefix		Status	In process
Price	10.00	Owning Library	ROLLA-PL	Call #	E FIC MON	Due Date	
Acquisition Cost		Shelving Location	Stacks	Call # Suffix		Checkout Date	
ISBN	{("0375929134 (lib. bdg.)")}	Loan Duration	Normal	Renewal Type		Checkout Workstation	

1. From here, click on the "Actions" dropdown.

2. Scroll down the list until you find and select "Replace Barcodes."



MEcataloger @ ME-Desktop

Search | Circulation | Cataloging | Acquisitions | Booking | Administration

Submit OR Browse... No file selected. Actions List View

Record Summary (MARC)

Title: The monster at the end of this book **Edition:** 1st big little golden book ed.

Author: Stone, Jon. **Pub Date:** 2004

Bib Call #: E

Quick Summary | Recent Circ History | Circ History List | Holds / Transit | Catalog

Barcode	Train001	Circ Library	ROLLA-PL	Call # Prefix	
Price	10.00	Owning Library	ROLLA-PL	Call #	
Acquisition Cost	10.00	Shelving Location	Stacks	Call # Suffix	
ISBN	{0375929134 (lib. bdg.)}	Loan Duration	Normal	Renewal Type	Checkout Workstation
Date Created	4/22/2004 4:18	File Level	Normal	Total Size	Question File

Actions dropdown menu items:

- Item as Discard/Weed
- Item as Missing
- Add
 - Add Items
 - Add Call Numbers and Items
 - Add Item Alerts
- Edit
 - Call Numbers
 - Items
 - Call Numbers and Items
 - Replace Barcodes
 - Manage Item Alerts
- Transfer
 - Items to Previously Marked Library
 - Items to Previously Marked Call Number

You'll then get this pop-up window.

Replace Item Barcode

Enter Original Barcode for Item

Train001

Enter New Barcode for Item

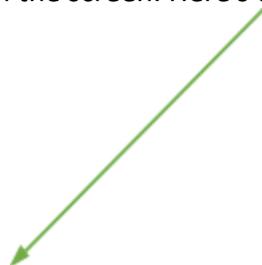
Train002

Submit Cancel

I'm going to replace our **Train001** barcode with **Train002**.

Click on "**Submit**." The refresh the Main Holdings screen.

Go back into the "Item Table" and refresh the screen. Here's the result:



Set Default View

Item Table MARC Edit MARC View View Holds Monograph Parts Holdings View Conjoined Items Shelf Browse Patron View

0 selected [Menu] [K] [Left] [Right] Rows 10 [Down] [Settings]

#	Location	Call Number / Item Notes	Barcode	Shelving Location	Circulation Modifier	Age Hold Protection	Active/Cre... Date	Holdable?	Status	Due Date
1	ROLLA-PL	E HC MON	Train002 View Edit	Stacks	Books		10/20/2021	Item Hold Call Number H	In process	
2	ROLLA-PL	E STO	382561014024+ View Edit	Juvenile Pict...	Books		08/06/2021	Item Hold Call Number H	Available	

For a demonstration of this, please watch the [Basic Cataloging Video 4](#). (first half of the video)

Delete Holdings

To delete a holding, go to the “Item Table” then to the “Holdings View”

The screenshot shows the Staff Catalog interface. At the top, there is a navigation bar with menus for Search, Circulation, Cataloging, Acquisitions, Booking, and Administration. The user is logged in as MEcataloger @ ME-Desktop. The main content area displays the record summary for the book "The monster at the end of this book" by Stone, Jon. The record includes fields for Title, Edition, TCN, Author, Pubdate, Database ID, Bib Call #, Record Owner, and Created/Last Edited dates. Below the record summary, there are navigation buttons (Start, Previous, Next, End, Back to Results) and action buttons (Place Hold, Add Holdings, Serials, Mark For..., Other Actions). The Holdings View tab is selected and circled in blue. Below the tabs, there is a table with columns: #, Location, Call Number / Item Notes, Barcode, Shelving Location, Circulation Modifier, Age Hold Protection, Active/Cre... Date, Holdable?, Status, and Due Date. The table contains two rows of holdings data.

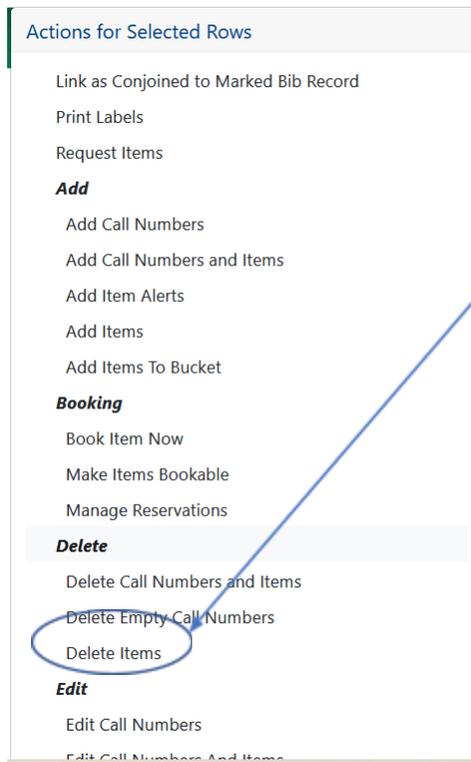
#	Location	Call Number / Item Notes	Barcode	Shelving Location	Circulation Modifier	Age Hold Protection	Active/Cre... Date	Holdable?	Status	Due Date
1	ROLLA-PL	E FIC MON	Train001 View Edit	Stacks	Books		10/20/2021	Item Hold Call Number H	In process	
2	ROLLA-PL	E STO	382561014024+ Juvenile Pict... View Edit		Books		08/06/2021	Item Hold Call Number H	Available	

From there, select the item you want to delete:

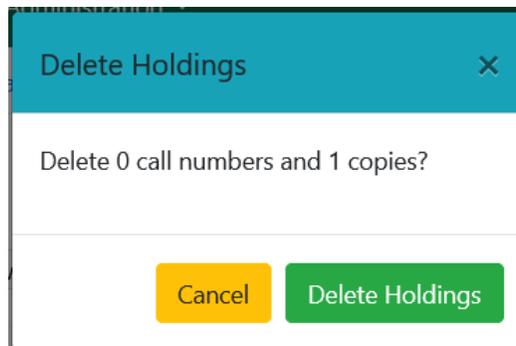
The screenshot shows a table of holdings with columns: #, Location, Call Number / Item Notes, Barcode, Shelving Location, Circulation Modifier, Age Hold Protection, Active/Cre... Date, Holdable?, Status, and Due Date. Row 7 is selected, indicated by a blue checkmark in the first column and a blue background. A blue arrow points to the checkmark in row 7.

<input type="checkbox"/>	5	3825610140	E STO	3825610...	ROLLA-PL	ROLLA-PL	Juvenile ...	Books	Available	08/06/20...	Yes
<input type="checkbox"/>	6	▼ E STO	2	E STO		ROLLA-PL					
<input checked="" type="checkbox"/>	7	Train003	E STO	Train003	ROLLA-PL	ROLLA-PL	Stacks	Books	Available	12/02/20...	Yes
<input type="checkbox"/>	8	Train006	E STO	Train006	ROLLA-PL	ROLLA-PL	Stacks	Books	In process		Yes

Then right-mouse click on the selection and scroll through the dropdown list until you find "Delete Items:"



From there you'll get a warning pop-up:



Click on the "Delete Holdings" button. The Items screen refreshes and the barcode has been deleted.

<input type="checkbox"/>	4	▼ E STO	1	E STO		ROLLA-PL					
<input type="checkbox"/>	5	3825610140		E STO	3825610...	ROLLA-PL	ROLLA-PL	Juvenile ...	Books	Available	0
<input type="checkbox"/>	6	▼ E STO	1	E STO		ROLLA-PL					
<input type="checkbox"/>	7	Train006		E STO	Train006	ROLLA-PL	ROLLA-PL	Stacks	Books	In process	

Remember, if you delete the last holding in a record, the system will delete the entire MARC record as well.

For a demonstration of this, please watch the [Basic Cataloging Video 4](#). (second half of the video)

Another way to do this is to start at the “Main Holdings” screen again. Click on the “View” link under the barcode of the item to be deleted.

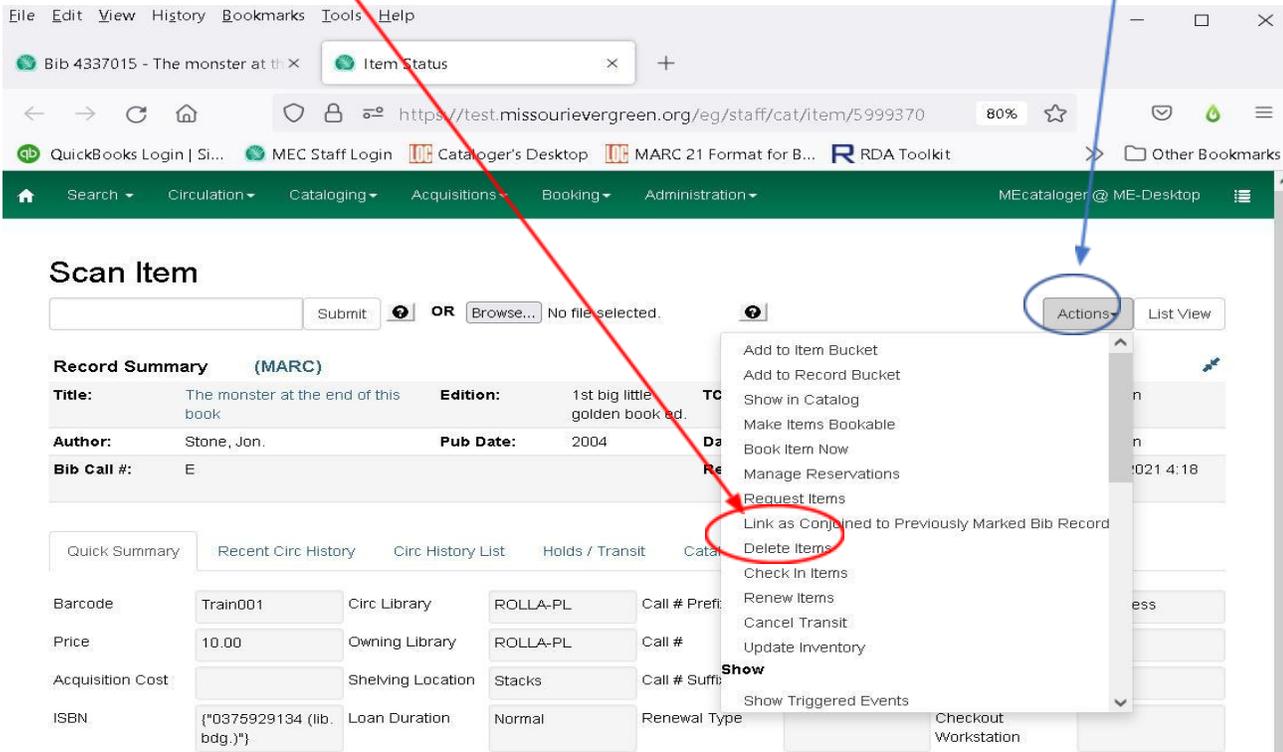
The screenshot shows the 'Staff Catalog' interface. At the top, there is a navigation bar with options like Search, Circulation, Cataloging, Acquisitions, Booking, and Administration. Below this is a 'Record Summary' for a book titled 'The monster at the end of this book'. The record includes fields for Title, Edition, TCN, Author, Pubdate, Database ID, Bib Call #, Record Owner, and Created On. Below the record summary is an 'Item Table' with columns for #, Location, Call Number / Item Notes, Barcode, Shelving Location, Circulation Modifier, Age Hold Protection, Active/Cre... Date, Holdable?, Status, and Due Date. The first row in the table has a barcode of 'Train001' and a 'View' link. A green arrow points from this 'View' link to the 'View' link in the record summary.

That opens the “Item Status” screen.

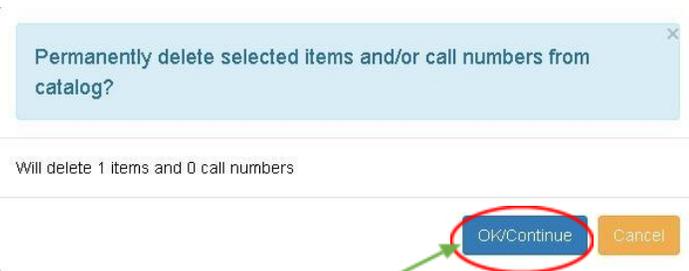
The screenshot shows the 'Scan Item' screen. At the top, there is a navigation bar with options like Search, Circulation, Cataloging, Acquisitions, Booking, and Administration. Below this is a 'Scan Item' section with a search bar and a 'Submit' button. Below the search bar is a 'Record Summary' for the same book as in the previous screenshot. Below the record summary is a table with columns for Barcode, Price, Acquisition Cost, ISBN, Date Created, Date Active, Status Changed, Item ID, Circulate, Circ Library, Owning Library, Shelving Location, Loan Duration, Reference, OPAC Visible, Holdable, Renewal, Call # Prefix, Call #, Call # Suffix, Renewal Type, Total Circs, Total Circs - Current Year, Total Circs - Prev Year, In-House Uses, Remaining, Status, Due Date, Checkout Date, Checkout Workstation, Duration Rule, Recurring Fine Rule, Max Fine Rule, Checkin Time, and Checkin Scan. The table contains data for the item with barcode 'Train001'.

1. On the right of the screen, click on the "Actions" dropdown button

2. Then select "Delete Items":



This warning screen should then appear:



Click "OK/ Continue."

The item status reappears with this message:



Bib Call #: E **Record Owner:**

Quick Summary Recent Circ History Circ History List Holds / Transit Cataloging Info Triggered Events

This item has been marked as Deleted.

Barcode	Train001	Circ Library	ROLLA-PL	Call # Prefix		Sta
Price	10.00	Owning Library	ROLLA-PL	Call #	E FIC MON	Du
Acquisition Cost		Shelving Location	Stacks	Call # Suffix		Ch
ISBN	{"0375929134 (lib. bdg.)"}	Loan Duration	Normal	Renewal Type		Ch Wc
Date Created	10/20/2021 10:40	Fine Level	Normal	Total Circs	0	Du

Refresh the screen. You'll see that the new holding is gone!

Home Search Circulation Cataloging Acquisitions Booking Administration MEcataloger @ ME-Desktop

Staff Catalog

Show Search Form

Record Summary Book

Title: The monster at the end of this book **Edition:** 1st big little golden book ed. **TCN:** 4337015 **Created By:** admin

Author: Stone, Jon. **Pubdate:** 2004 **Database ID:** 4337015 **Last Edited By:** admin

Bib Call #: E **Record Owner:** **Created On:** 8/3/21, 4:18 PM **Last Edited On:** 8/3/21, 4:18 PM

Related Resource: <http://www.loc.gov/catdir/bios/random055/2003107954.html>
Contributor biographical information

Related Resource: <http://www.loc.gov/catdir/description/random0414/2003107954.html>
Publisher description

Start Previous Next End Back to Results (1 / 12) Place Hold Add Holdings Serials Mark For... Other Actions

Set Default View

Item Table MARC Edit MARC View View Holds Monograph Parts **Holdings View** Conjoined Items Shelf Browse Patron View

0 selected [Menu] [K] [Left] [Right] Rows 10 [Down] [Settings]

#	Location	Call Number / Item Notes	Barcode	Shelving Location	Circulation Modifier	Age Hold Protection	Active/Cre... Date	Holdable?	Status	Due Date
1	ROLLA-PL	E STO	382561014024+ View Edit	Juvenile Pict...	Books		08/06/2021	Item Hold Call Number H	Available	

Changing call numbers

Changing call numbers is an easy process. Since we're already looking at the MARC record for "The Monster at the end of this book", I'll go in there to make this change. After searching, I'll click on the title:

7. **The monster at the end of this book : starring lovable, furry old Grover** 27 / 39 items @ ME TCN: 2585123 Holds: 0
Stone, Jon.
Book
Call Number: E FIC MONSTERS STO
Phys. Desc.: print, 1 volume (unpaged) : color illustrations ; 21 cm.
Publisher: New York : Golden Books, ©2015.
ISBN: 9780553508734, 0553508733

And then go into the **Holdings** view:

Record Summary

Title:	The monster at the end of this book :	Edition:		TCN:	25
	starring lovable, furry old Grover				
Author:	Stone, Jon.	Pubdate:	2015	Database ID:	2
Bib Call #:	[E]	Record Owner:		Created On:	9

Start Previous Next End Back to Results (7 / 39)

Patron View Place Hold Add Holdings Serials Mark For... Other Actions

Item Table MARC Edit MARC View View Holds Monograph Parts **Holdings View**

I then scrolled through the list until I found the item I wanted to change:



<input type="checkbox"/>	1...	▼ WAPL	1	1		
<input type="checkbox"/>	1...	▼ WPL	1	1		
<input type="checkbox"/>	1...	▼ E STO	1	E STO		WPL
<input type="checkbox"/>	1...	3150570875		E STO	3150570...	WPL WPL

I then select the check box on the left.

<input type="checkbox"/>	1...	▼ WPL	1	1		
<input checked="" type="checkbox"/>	1...	▼ E STO	1	E STO		
<input type="checkbox"/>	1...	3150570875		E STO		

Then I'll right-mouse click on the highlighted area to activate the "Actions for Selected Rows" dropdown menu:

<input checked="" type="checkbox"/>	1...	▼ E STO	1	E STO		WPL
<input type="checkbox"/>	1...	3150570875		E STO		WPL

Actions for Selected Rows

- Link as Conjoined to Marked Bib Record
- Print Labels
- Request Items
- Add**
- Add Call Numbers
- Add Call Numbers and Items

Once there, scroll down the list until you find "Edit Call Numbers."

Edit

- Edit Call Numbers
- Edit Call Numbers And Items

That brings up the Holdings editor:

Owning Library	Call Numbers	Classification	Prefix	Call Number Label	Suffix
WPL	1	Generic		E STO	

From here, go into the "Call Number Label" and change it. I'm going to change this call number this "E SES"

Classification	Prefix	Call Number Label
Generic		E SES

Then click "Save and Exit"

Owning Library	Call Numbers	Classification	Prefix	Call Number Label	Suffix
WPL	1	Generic		E SES	

Save & Exit

That refreshes the Holdings view which will show the new call number:

<input checked="" type="checkbox"/>	1...	WPL	1	1			
<input type="checkbox"/>	1...	E SES	1	E SES	3150570875	WPL	
<input type="checkbox"/>	1...	3150570875		E SES	3150570...	WPL	WPL

For a demonstration of this, please watch the [Basic Cataloging Video 5](#).

Transferring items between bibliographic records

As the catalog grows, we often find we need to move items from an incorrect bibliographic record to one that is more accurate. Often in the shared catalog, we might see a mass market paperback accidentally added to a large print book record, or a VHS tape on the same record with DVDs. All of these examples need to have their own unique record. For this exercise, it's easier if you have two sessions of the MEC catalog open.

The first step in this process is to find an item that is clearly on the wrong record. In the example below, there's a **DVD** on a **VHS** record.

The screenshot shows the MEC catalog interface. At the top, there is a header with navigation tabs: Search, Circulation, Cataloging, Acquisitions, Booking, and Administration. Below this is a green bar with the text 'MEcataloger @ ME-Desktop' and a 'Set Default View' button. The main content area displays a bibliographic record for the title 'It's a wonderful life'. The record includes fields for Title, Author, Bib Call #, Edition, Pubdate, Record Owner, TCN, Database ID, Created On, and Last Edited On. Below the record is a table of holdings with the following columns: #, Location, Call Number / Part, Barcode, Shelving Location, Circulation Modifier, Age Hold Protection, Active/Create Date, Holdable?, Status, and Due Date. The table contains four rows of holdings. A blue arrow points to the 'Call Number / Part' column, and an orange arrow points to the 'Circulation Modifier' column.

#	Location	Call Number / Part	Barcode	Shelving Location	Circulation Modifier	Age Hold Protection	Active/Create Date	Holdable?	Status	Due Date
1	HCPL	DVD ITS	Train007	Stacks	DVD		11/17/2021	Item Hold Call Number Hol	In process	
2	HCPL	VIDEO/F/ITS	3465800011138 Media		Videos		03/24/2013	Item Hold Call Number Hol	Available	
3	MV-PL	VCF It's a Wo...	3017610017171 Video Cassett...		Videos		02/23/2018	Item Hold Call Number Hol	Available	
4	TX-CAB	It's	3835010089826 Video		Videos		07/08/2017	Item Hold Call Number Hol	Available	

You can further verify this by looking at the **"MARC view"** tab and verifying the main record is in fact a VHS tape.

LDR01158ngm a2200373Ki 4500
 001 2260068
 003 ME
 005 20170928175435.0
 007 vf bbahou
 008 961226r19991946xx 110 g vlang d
 024 1 0 \$a 1555292356
 028 4 0 \$a HMV-8001
 035 \$a (OCoLC)36134983
 040 \$b eng \$e rda
 092 \$a It's
 245 0 0 \$a It's a wonderful life / \$c produced and directed by Frank Capra.
 264 1 \$a Vido Treasures, Ohio : \$b [publisher not identified], \$c [1999]
 300 \$a 1 videocassette (130 min.) : \$b sound, black and white ; \$c 1/2 in.
 336 \$a two-dimensional moving image \$2 rdacontent
 337 \$a video \$2 rdamedia
 338 \$a videocassette \$2 rdacarrier
 490 1 \$a Hollywood movie greats.
 521 8 \$a Not Rated.
 511 1 \$a James Stewart, Donna Reed.
 500 \$a VHS format.
 650 0 \$a Videocassettes. #0 (ME)512408
 655 7 \$a Feature films. \$2 lcgft #0 (ME)368681

The next step is to find the record this item actually belongs on.

In this case, I did a "Numeric Search" for the UPC of the item in hand, which brought up this record:

The screenshot shows a library catalog search interface. At the top, there are navigation tabs: 'Keyword Search', 'Numeric Search' (highlighted with an orange circle), 'MARC Search', 'Browse', and 'Shelf Browse'. Below the tabs is a search input area with a dropdown menu set to 'UPC' and a text field containing '032429251633'. To the right of the search input are buttons for 'ME', 'Search', and 'Reset'. Below the search input is a 'Query Type' dropdown and a 'Value' field. On the right side of the search area, there are links for 'Search Templates', 'Basket Actions', and 'Catalog Preferences'. Below the search area, the search results are displayed. The first result is 'It's a wonderful life.' with a 'Place Hold' button. The result details include: '5 / 11 items @ ME', 'TCN: 3592217', 'Holds: 0', 'Created 9/24/19 by pbadmin', and 'Edited 1/7/20 by jcltech2'. A 'Place Hold' button is visible next to the result.

From here, click on the title and then on the "Holdings View" tab. Here's the record that matches the item:

Record Summary DVD

Title: It's a wonderful life. **Edition:** Platinum anniversary edition. **TCN:** 3592217 **Created By:** pbadmin

Author: **Pubdate:** 2016 **Database ID:** 3592217 **Last Edited By:** jdtech2

Bib Call #: 791.43/72 **Record Owner:** **Created On:** 9/24/19, 4:13 PM **Last Edited On:** 1/7/20, 11:05 AM

Start Previous Next End Back to Results (1 / 1) Patron View Place Hold Add Holdings Serials Mark For... Other Actions

Set Default View

Search Circulation Cataloging Acquisitions Booking Administration MEcataloger @ ME-Desktop

Holdings Maintenance ME

Show Call Numbers Show Copies Show Empty Call Numbers Show Empty Libs 0 selected

#	Location/Barcode	Call Numbers	Copies	Call Number	Barcode	Circ Library	Owning Library	Due Date	Shelving Location	Circulat... Modifier	Status	Active/... Date	Age Hold Protect...	Holdab...
<input type="checkbox"/>	1 ME	10	11											
<input type="checkbox"/>	2 CC	1	1											
<input type="checkbox"/>	3 CC-ST	1	1											
<input type="checkbox"/>	4 DVDF ITS	1		DVDF ITS			CC-ST							
<input type="checkbox"/>	5 33431000!			DVDF ITS	334310...	CC-ST	CC-ST		DVD	DVD	In transit	11/25/2...	3_month...	Yes
<input type="checkbox"/>	6 DM	1	1											
<input type="checkbox"/>	7 DML	1	1											
<input type="checkbox"/>	8 DVD	1		DVD			DML							
<input type="checkbox"/>	9 35712001!			DVD	357120...	DML	DML		DVD	DVD	In process		3month	Yes

From here, click on the "Mark For" dropdown menu

and then select "Holding Transfer." This marks the good record for a transfer.

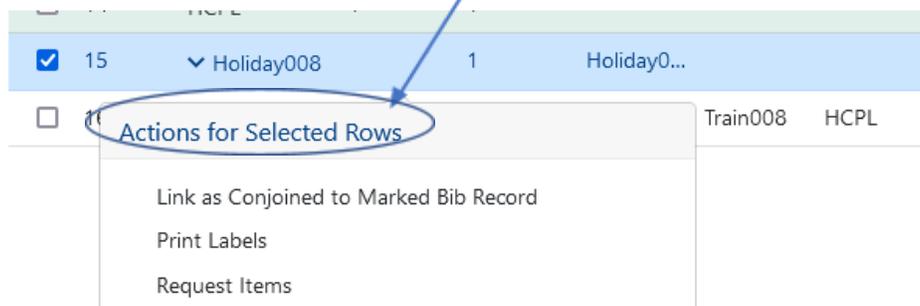
The screenshot shows the 'Mark For...' dropdown menu open. The options are: Conjoined Items, Overlay Target, Title Hold Transfer (circled in green), Holding Transfer (Currently 4236016), and Reset Record Marks. A blue arrow points to the 'Mark For...' button, and a green arrow points to the 'Title Hold Transfer' option.

Go back to the item that needs to be transferred, then click on "Holdings View" and highlight the item:

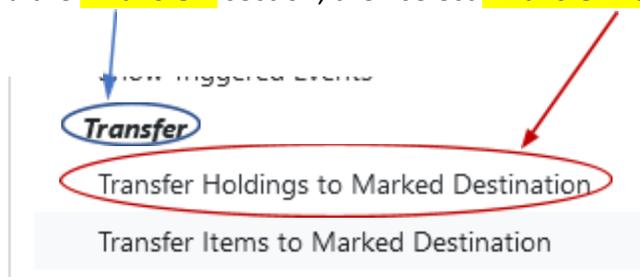


<input type="checkbox"/>	14	▼ HCPL	1	1		
<input checked="" type="checkbox"/>	15	▼ Holiday008	1	1	Holiday0...	HCPL
<input type="checkbox"/>	16	Train008			Holiday0... Train008	HCPL HCPL

Then right-mouse click on the item to open the "Actions for Selected Rows" dropdown menu:



Scroll down the list until you find the "Transfer" section, then select "Transfer Holdings to Marked Destination:"



This refreshes the Holdings Screen and the incorrect item is now gone.

<input type="checkbox"/>	#	Location/Barcode	Call Numbers	Copies	Call Number	Barcode	Circ Library	Owning Library	Due Date	Shelving Location	Circulat... Modifier	Status	Active/... Date	Age Hold Protect...	Holdab...
<input type="checkbox"/>	1	▼ ME	6	6											
<input type="checkbox"/>	2	▼ HOCO	1	1											
<input checked="" type="checkbox"/>	3	▼ HCPL	1	1											
<input type="checkbox"/>	4	▼ VIDEO/F/ITS		1	VIDEO/F...			HCPL							
<input type="checkbox"/>	5	34658000			VIDEO/F...	346580...	HCPL	HCPL		Media	Videos	Available	03/24/2...		Yes
<input type="checkbox"/>	6	▼ MV	1	1											
<input type="checkbox"/>	7	▼ MV-PL	1	1											
<input type="checkbox"/>	8	▼ VCF It's a Wo		1	VCF It's ...			MV-PL							
<input type="checkbox"/>	9	30176100			VCF It's ...	301761...	MV-PL	MV-PL		Video Ca...	Videos	Available	02/23/2...		Yes
<input type="checkbox"/>	10	▼ TX	3	3											
<input type="checkbox"/>	11	▼ TX-CAB	1	1											
<input type="checkbox"/>	12	▼ It's		1	It's			TX-CAB							
<input type="checkbox"/>	13	38350100			It's	383501...	TX-CAB	TX-CAB		Video	Videos	Available	07/08/2...		Yes
<input type="checkbox"/>	14	▼ TX-CAB	1	1											

To verify the transfer, search the UPC again. Here's the new record with the new holding:

The screenshot shows a library catalog record for the title "It's a wonderful life." with a new holding circled in blue. The record includes metadata such as Title, Edition, TCN, Author, Pubdate, Database ID, Bib Call #, Record Owner, and Created On. Below the metadata is a table of holdings with columns for #, Location, Call Number / Part, Barcode, Shelving Location, Circulation Modifier, Age Hold Protection, Active/Create Date, Holdable?, Status, and Due Date. The first holding is circled in blue, showing a barcode of Train007.

#	Location	Call Number / Part	Barcode	Shelving Location	Circulation Modifier	Age Hold Protection	Active/Create Date	Holdable?	Status	Due Date
1	CC-ST	DVD ITS	Train007 View Edit	Stacks	DVD		11/17/2021	Item Hold	In process	
2	CC-ST	DVDF ITS	Complete Set 3343100059877 DVD View Edit		DVD	155	11/25/2019	Item Hold Call Number Hol	In transit	

For a demonstration of this, please watch the [Basic Cataloging video 6](#).

Adding monograph parts to specific records

Monograph Parts enables you to differentiate between parts of monographs or other multi-part items. This feature allows catalogers to describe items more precisely by labeling the parts of an item. For example, catalogers might identify the parts of a monograph, such as a series of encyclopedias or the discs of a DVD set. This feature also allows patrons more flexibility when placing holds on multi-part items. A patron could place a hold on a specific disc of a DVD set if they want to access a specific disc or episode rather than an entire series.

For this exercise, I'm going to look at TCN 405579, Mission Impossible Season 1. This record contains 7 DVDs. In this scenario, my library's policy is separate out movies with more than 2 disks into individual parts.

Here's my search result:

The screenshot shows a library catalog interface with a green navigation bar at the top. Below the navigation bar, there is a record summary for 'Mission: Impossible Season 1'. The record details include Title, Edition, TCN, Created By, Author, Pubdate, Database ID, Last Edited By, Bib Call #, Record Owner, Created On, and Last Edited On. Below the record details, there are navigation buttons (Start, Previous, Next, End, Back to Results) and action buttons (Patron View, Place Hold, Add Holdings, Serials, Mark For..., Other Actions). A 'Set Default View' button is also present. Below the navigation and action buttons, there are tabs for 'Item Table', 'MARC Edit', 'MARC View', 'View Holds', 'Monograph Parts', 'Holdings View', and 'Conjoined Items'. The 'Monograph Parts' tab is highlighted with a blue circle and an arrow. Below the tabs, there is a table with columns: #, Location, Call Number / Item Notes, Part, Barcode, Shelving Location, Circulation Modifier, Age Hold Protect..., Active/Date, Holdings, Status, and Due Date. The table contains one row with the following data: # 1, Location NNCL-N..., Call Number / Item Notes TV SHO..., Part 1, Barcode 34162001, Shelving Location DVD TV..., Circulation Modifier DVD, Age Hold Protect..., Active/Date 09/30/2..., Holdings Item Hold, Status Available, Due Date. A tooltip is visible over the 'Item Hold' link in the Holdings column, showing 'Item Hold' and 'Call Number Hold' options.

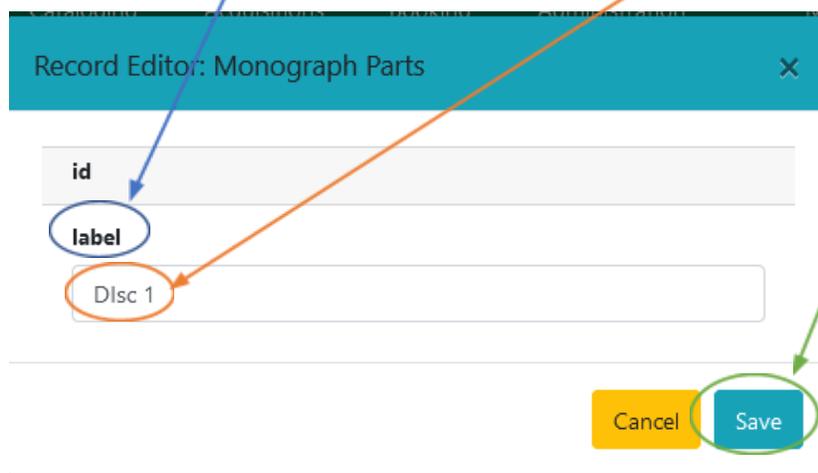
To split this item out, I'm going to select "Monograph Parts".

That bring ups the following screen:



From here, I'm going to select "New Monograph Part."

That generates this screen. Under the "label" field, I'm going to write "Disc 1" then I'll click on "Save"



That returns us to the previous screen with an update:



I'm going to repeat this process for each disc. This is the end result:

<input type="checkbox"/>	#	id	label
<input type="checkbox"/>	1	187171	Disc 1
<input type="checkbox"/>	2	187172	Disc 2
<input type="checkbox"/>	3	187173	Disc 3
<input type="checkbox"/>	4	187174	Disc 4
<input type="checkbox"/>	5	187175	Disc 5
<input type="checkbox"/>	6	187176	Disc 6
<input type="checkbox"/>	7	187177	Disc 7

From here, you need to go into “Holdings View”:

Title: **Mission: impossible.** Season 1 **Edition:** **TCN:** 4055729 **Created By:** admin
Author: **Pubdate:** 2006 **Database ID:** 4055729 **Last Edited By:** admin
Bib Call #: **Record Owner:** **Created On:** 9/29/20, 3:56 PM **Last Edited On:** 9/29/20, 3:56 PM

0 selected

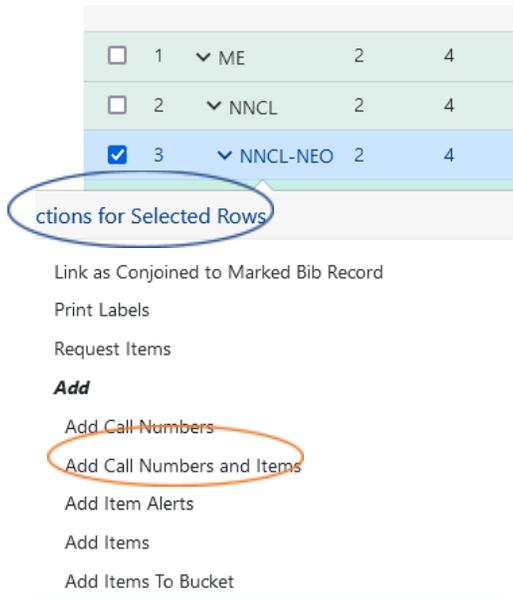
On this screen, find the library location that you want to add a holding to, then right-mouse click.

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

0 selected

<input type="checkbox"/>	#	Location/Barco...	Call Numb...	Copies	Call Number	Barcode	Circ Library	Owning Library	Due Date	Shelving Location	Circul... Modifi...	Status	Active... Date	Age Hold Protec...	Holda...
<input type="checkbox"/>	1	ME	2	4											
<input type="checkbox"/>	2	NNCL	2	4											
<input type="checkbox"/>	3	NNCL-NEO	2	4											
<input type="checkbox"/>	4	DVD Miss	3		DVD M...			NNCL-...							
<input type="checkbox"/>	5	TV SHOW I	1		TV SH...			NNCL-...							
<input type="checkbox"/>	6	341620C			TV SH...	34162...	NNCL-...	NNCL-...		DVD T...	DVD	Available	09/30/...		Yes

From the “Actions for Selected Rows” dropdown list that appears, select “Add Call Numbers and Items”



From here we have a few fields to fill out.

First, make sure the correct library location auto-populates:

Owning Library	Call Numbers	Classification	Prefix	Call Number Label	Suffix	Items	Barcode	Item #	Part
UNCL-NEO	1	Generic		DVD Miss		1	Train012		Disc 3
		Generic		DVD Miss		1	Train013		Disc 4

Then we need to add 3 identifiers for each part: a call number, a unique barcode and the specific identifying part. For brevity, I only added 4 of the 7 parts to this record.

Under the Working Items tab, you need to change the following fields:

Circulate? <input checked="" type="radio"/> Yes <input type="radio"/> No	Status Available	Circulating Library NNCL-NEO	Reference? <input type="radio"/> Yes <input checked="" type="radio"/> No
Shelving Location Stacks (ME)	OPAC Visible? <input checked="" type="radio"/> Yes <input type="radio"/> No	Circulation Modifier DVD	Price 0
Loan Duration Normal	Acquisitions Cost 0	Circulate as Type Two-dimensional nonprojectal	Holdable? <input checked="" type="radio"/> Yes <input type="radio"/> No
Deposit? <input type="radio"/> Yes <input checked="" type="radio"/> No	Deposit Amount 0	Age-based Hold Protection <NONE>	Quality <input checked="" type="radio"/> Good <input type="radio"/> Damaged

These field values are unique for each library and each item and are flexible depending on the need. Each dropdown has multiple choices available. The owning library is typically your library. I left the price blank here as that information is on the main holding record.

At the bottom of the screen, you should see the changes you've made:

Store Selected	Save & Exit					
<input checked="" type="checkbox"/>	Barcode	Created	Creator	Activated	Edited	Editor
<input checked="" type="checkbox"/>	Train012					
<input checked="" type="checkbox"/>	Train013					

Click "Save and Exit."

Once saved, go back to the "Item Table" screen. This image shows the changes you've made:



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

0 selected     Rows 10  

#	Location	Call Number / Part Item Notes	Barcode	Shelving Location	Circulation Modifier	Age Hold Protection	Active/Create Date	Holdable?	Status	Due Date
1	NNCL-NEO	DVD Miss Disc 1	Train010 View Edit	Stacks	DVD		11/16/2021	Item Hold Call Number Hol	Available	
2	NNCL-NEO	DVD Miss Disc 2	Train011 View Edit	Stacks	DVD		11/16/2021	Item Hold Call Number Hol	Available	
3	NNCL-NEO	DVD Miss Disc 3	Train012 View Edit	Stacks	DVD		11/16/2021	Item Hold Call Number Hol	Available	
4	NNCL-NEO	DVD Miss Disc 4	Train013 View Edit	Stacks	DVD		11/16/2021	Item Hold Call Number Hol	Available	
5	NNCL-NEO	TV SHOW MI...	3416200131051 View Edit	DVD TV Show	DVD		09/30/2020	Item Hold Call Number Hol	Available	

Note: when adding monograph parts, be sure to use the accepted descriptions as outlined in the MEC Best Policies Document.

Now let's assume for this exercise that a patron checked out Disc #3 and it came back damaged and will no longer play. We need to remove that disc from the Holdings list.

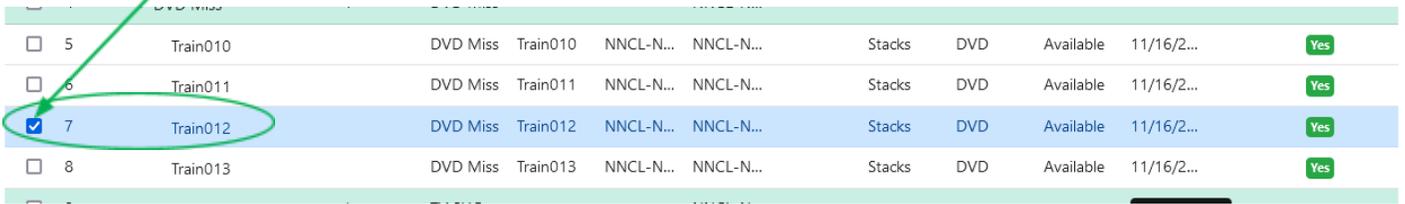
First, click on the "Holdings View" button.

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

0 selected     Rows 10  

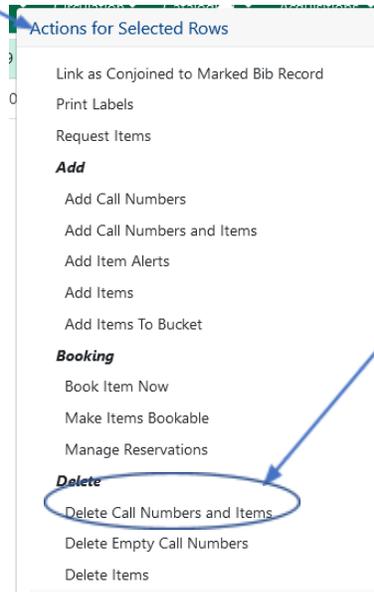
#	Location	Call Number / Part Item Notes	Barcode	Shelving Location	Circulation Modifier	Age Hold Protection	Active/Cre...	Holdable?	Status	Due Date
1	NNCL-NEO	DVD Miss Disc 1	Train010 View Edit	Stacks	DVD		11/16/2021	Item Hold Call Number Hc	Available	
2	NNCL-NEO	DVD Miss Disc 2	Train011 View Edit	Stacks	DVD		11/16/2021	Item Hold Call Number Hc	Available	
3	NNCL-NEO	DVD Miss Disc 3	Train012 View Edit	Stacks	DVD		11/16/2021	Item Hold Call Number Hc	Available	
4	NNCL-NEO	DVD Miss Disc 4	Train013 View Edit	Stacks	DVD		11/16/2021	Item Hold Call Number Hc	Available	
5	NNCL-NEO	TV SHOW M...	341620013105 View Edit	DVD TV Show	DVD		09/30/2020	Item Hold Call Number Hc	Available	

Highlight the item that needs to be removed, then right-mouse click on it anywhere in the highlighted area.

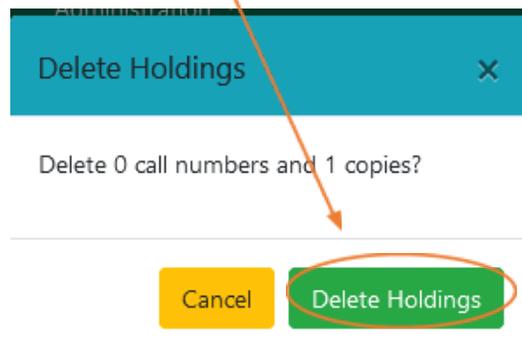


<input type="checkbox"/>	5	Train010	DVD Miss	Train010	NNCL-N...	NNCL-N...	Stacks	DVD	Available	11/16/2...	Yes
<input type="checkbox"/>	6	Train011	DVD Miss	Train011	NNCL-N...	NNCL-N...	Stacks	DVD	Available	11/16/2...	Yes
<input checked="" type="checkbox"/>	7	Train012	DVD Miss	Train012	NNCL-N...	NNCL-N...	Stacks	DVD	Available	11/16/2...	Yes
<input type="checkbox"/>	8	Train013	DVD Miss	Train013	NNCL-N...	NNCL-N...	Stacks	DVD	Available	11/16/2...	Yes

That brings up an "Actions for Selected Rows" dropdown menu. From the list, select "Deleted Call Numbers and Items."



That brings up this warning screen. Click on "Delete Holdings."



That refreshes the "Record Summary" screen. Then click on the "Item Table" tab. The 3rd disc is gone!

Set Default View

Item Table MARC Edit MARC View View Holds Monograph Parts Holdings View Conjoined Items Shelf Browse Patron View

0 selected [Menu] [K] [Left] [Right] Rows 10 [Down] [Settings]

#	Location	Call Number / Item Notes	Part	Barcode	Shelving Location	Circulation Modifier	Age Hold Protection	Active/Create Date	Holdable?	Status	Due Date
1	NNCL-NEO	DVD Miss	Disc 1	Train010 View Edit	Stacks	DVD		11/16/2021	Item Hold Call Number Hol	Available	
2	NNCL-NEO	DVD Miss	Disc 2	Train011 View Edit	Stacks	DVD		11/16/2021	Item Hold Call Number Hol	Available	
3	NNCL-NEO	DVD Miss	Disc 4	Train013 View Edit	Stacks	DVD		11/16/2021	Item Hold Call Number Hol	Available	
4	NNCL-NEO	TV SHOW MI...		3416200131051 View Edit	DVD TV Show	DVD		09/30/2020	Item Hold Call Number Hol	Available	

For a demonstration of this, please watch the [Basic Cataloging course video 7](#).

Basic Cataloging coursework / certificate work:

1. In reading the article discussing the Five Laws of Library Science, what are your thoughts regarding this article and cataloging?
2. Open up the MEC test server and sign in.
3. Do a book title search for **“Remember When”** by Nora Roberts and J.D. Robb.
4. Click on the first record.
5. Click on the “MARC View” tab and take a screen shot of it. Label image this Screenshot 1.
6. In our discussion of MARC tags, what missing tags do you think should be added and why? Are there any tags in the record you would delete? If so, why?
7. Add a holding to the record, including a barcode that starts with the word “Train” followed by a three-digit number.
8. Add a second holding. Change the call number on this holding to some very different that the other holdings and add an additional “Train” barcode.
9. Take a screen shot of the updated Holdings screen. Label this image Screenshot 2.
10. Create a Holdings template for a record. Take a few screenshots of the name and the fields you filled out. Label these Screenshots 3a, 3b, 3c.
11. Change the first holding’s barcode to “Training” with a new three-digit number i.e. “Training900.”
12. Delete the second holding you added.
13. Take another screen shot of the updated Holdings page. Label this image Screenshot 4.
14. Change the call number of one of your holdings. Take a screenshot and label it Screenshot 5.
15. Add a paperback holding to a large print record using another TrainXXX barcode format.
16. Take a screen shot of that holding. Label this image Screenshot 6.
17. Find the record the holding is supposed to be on.
18. Transfer the one item from the wrong record to the correct one and take a screen shot of the new item on the right record. Label this image Screenshot 7.
19. Find a multi-part DVD set and break out the individual disks using the “Monograph Parts” option. Take a screenshot of the individual parts. Label that Screenshot 8.
20. Email all your answers and your screen shots to your supervisor and cataloger@moevergreenlibraries.org