

Introduction to the Catalog Editor Program

May 31, 2006

The Catalog Editor program was designed for librarians to properly develop and maintain a searchable database of library materials/holdings. It is a computerized card catalog that adheres to the Library of Congress MARC bibliographic recording standards so that automated library systems can exchange catalog data. Recording standards are necessary because an automatic record or an automated card catalog does not result by simply typing card catalog information into a computer. This information must be “programmed” or marked with “fields” so that a machine (in this case, a computer) can interpret the data.

User Objective

The lessons in this manual will guide Catalog Editor program users to make card catalog entries into a computerized database so that users of the On Line Public Access Catalog (OPAC) and the Internet Public Access Catalog (IPAC) can search for holdings and determine item availability.

Users Defined

The Catalog Editor Documentation or “Catedit” program is designed for use by either a single library or a multi-library system. The On Line Public Access Catalog (OPAC) is designed for the use by librarians and library users (the public).

Quick Reference: Commonly Used Terms

Authority control: Usually an established heading from a list of subject headings and names available in the Catedit program. Such a heading has been “approved” and, thus, maintains a standard for entering information into a MARC database such as author’s names, topics, or geographic names. For the purposes of establishing authority, the Library of Congress publishes subject headings compiled into books and available on disk available to libraries for purchase. There is also “local authority control” lists of locally established headings from which a librarian can choose for developing data records.

Catalog Editor: Software developed for librarians to develop and maintain library materials in a searchable database. Used to edit records using the MARC format in the OPAC database.

CatEdit: Nickname for the Catalog Editor program.

Delimiter: A character that “limits” a field. In Catedit, this character is called a “pipe” on the keyboard and is produced by holding down the “SHIFT” key along with the | (or “pipe bar”) key (located above the “Enter” key and below the “Backspace” key on the computer keyboard) at the same time. The result is the | symbol as a delimiter.

ExpertMarc: Nickname for the method and screen used to edit records at the *Marc Edit* screen (“expert” is the key word in this instance) when a record has more than two subjects or requires a more a more detailed description. A record that has been edited in ExpertMarc has an “E” next to it in the system.

Field: A MARC record is divided into fields (one for author, one for title, etc.). A field can have one or more subfields. A field can also be fixed (not varying in length) or variable (main entry, title, or notes are variable fields because they vary in length).

Indicator: A two-character item (a number from 0 to 9 in each position) that further defines a field. This item follows each tag except for Fields 001 through 009. For some fields, only the first or second indicator position is used, while other fields use both indicator positions, and still others use neither position. **Example:** Tag 245 14 = Tag or Field 245, with Indicator 1 as first indicator and Indicator 4 as second indicator.

IPAC: Internet Public Access Catalog of library records (added option for OPAC purchasers making it possible for library records to be uploaded to the Internet for library user access).

MARC: An acronym for "Machine-Readable Cataloging," a system of machine-readable standards used for recording bibliographic information that once appeared on library cataloging cards, and making that information machine-readable and there for searchable by OPAC.

MARC record: A machine-readable catalog of data records delineated by field tags, indicators, and subfields. The MARC format allows data to be stored, retrieved, and searched for within a system such as those described later in this lesson.

Nonfiling: The second indicator of the title field (Tag 245) which is set to "4" so that the word "The" will not be filed at the beginning of an item's title within a MARC record. The number four is for the first three letters (t-h-e), plus one space after the word "the". This indicator makes it possible for the word "the" not to be filed within the record. **Example:** *The Railway Children* becomes *Railway Children* in a MARC record with "4" as an indicator next to the title field.

OPAC: On Line Public Access Catalog of library records comprised of a database developed by librarians using the Catalog Editor (Catedit) software program. This database is searchable by the public.

QuickMarc: Nickname for the method and screen used to add a brief MARC entry using the *Changing a Brief Union MARC Record* form ("brief" is the key word here) that will hold information for a new MARC record.. This form may be completed for most MARC records and is easiest to use and learn. A record that has been entered in QuickMarc, but not yet edited in ExpertMarc, has a "Q" next to it in the system.

Tag: A tag is a three-digit number associated with a field that identifies the field and the type of data that the field contains. **Example:** 245 is the title information tag.

Union MARC record: Stands for "Machine-Readable Cataloging" record. Each item held by a library has a record of bibliographic information for the machine (computer) catalog.

USMARC: Formerly the Library of Congress or "LCMARC" and the standard bibliographic format used by most library computer programs and the standard all libraries should follow when developing their own MARC records.

Catalog Editor Program Menus and Buttons

Upon opening the Catalog Editor program, the *Lib/Net* screen will appear (see CatIntro-1, below).



NOTE: In all of the menu lists in the ensuing section, the underlined and boldfaced letter in each word indicates that the <Alt> key on the computer keyboard can be held down with that letter to access the menu, rather than use the mouse. For instance, rather than using the mouse to select the "File" menu, press down the <Alt> and the "F" key instead to pull down the same menu.

Menus

A series of eight pull-down menus are at the very top of this screen (see CatIntro-2, below).



They are labeled:

- **F**ile
- **I**ndexing
- **B**ibliography Edit
- **A**uthority
- **M**atch **R**etro Data
- **R**eports
- **A**dmin
- **H**elp

File Menu

- **P**rint Setup
- **C**hange Library
- **I**mport Bibliography
- **E**xit

Indexing Menu

1. Pre-process Indices
2. Initialize Database for Reindexing
3. Index **K**eyWords
4. Index **A**uthority
5. Index Authority **L**inks
6. **R**ecalc Authority Links (occurrences)

Bibliography Edit Menu

- **T**itle Search
- **K**eyWord Exclusions
- **R**eview Marc Templates

- Tags that should display in catalog card
- Bibliography Rules Maintenance
- Authority Rules Maintenance

Authority Menu

- Personal Names (Author)
- Topical Terms (Subject)
- Corporate Names
- Meeting Names
- Name Uniform Title
- Subject Uniform Title
- Geographic Names
- Authority Maintenance

Match Retro Data Menu

- Match Retrospective Data
- Match Imported With Existing Isbn
- Import Catalog
- Export Catalog

Reports Menu

- Tag Titles
- Call Number Report
- New Add Report
- Item Spine labels report
- Check Union Catalog for Authority Links
- Review Marc Records by Group

Buttons

At the top of the “Catedit” screen, under the pull-down menu names, there are five quick-reference buttons that can be used to enter the Catalog Editor system’s database. Each button at the top of this screen has a different function (see CatIntro-3, below, along with CatIntro-4, CatIntro5, CatIntro6, CatIntro7.).



Edit Marc Bibliography



Marc Import Wizard



Review Newly Imported Marc Records



Create or Refresh Word Indexes



Consider the Catedit software as the library card cataloger and the OPAC as the actual card catalog available to the public. Librarians use the Catedit program to catalog holdings into the card catalog (database), and library cardholders use the OPAC to search and determine the availability of those holdings.

Catalog Editor MARC Record Status Abbreviations

In the system, each holding is labeled with a status abbreviation, such as:

Q: Quick Edit or QuickMarc (record was entered using the “QuickMarc” function)

E: Expert Edit or ExpertMarc (record was entered using the “ExpertMarc” function)

I: Import (record was imported from an external “disk” file)

Difference Between a Record and an Item

Before using the “QuickMarc” and “ExpertMarc” modes, it is necessary for users to understand the difference between a MARC record and its related items. An item cannot exist without a MARC record. Consider the MARC record the “parent” of its “child”, the related item or items. The word “item” is also interchangeable with the word “copy”.

Example: A library is expecting to receive ten copies of a book previously not part of its holdings, such as *Wuthering Heights*. In this case, a librarian would have two options – he or she could go the Library of Congress’ MARC records and import a record for *Wuthering Heights*, or the librarian could create a new record using “QuickMarc”. Once the books arrive, the librarian would highlight the MARC record in the system for *Wuthering Heights* and click on the “Items” button and proceed to enter new bar codes and other information for each copy of the book.

Differences Between QuickMarc and ExpertMarc

QuickMarc and ExpertMarc are nicknames for two functions of the Catalog Editor software program that are each a means to the same end.

QuickMarc: The term used for adding or changing a brief MARC entry using the **Changing a Brief Union MARC Record** form (“brief” is the key word here). This form may be completed for most MARC records and is easiest to use and learn.

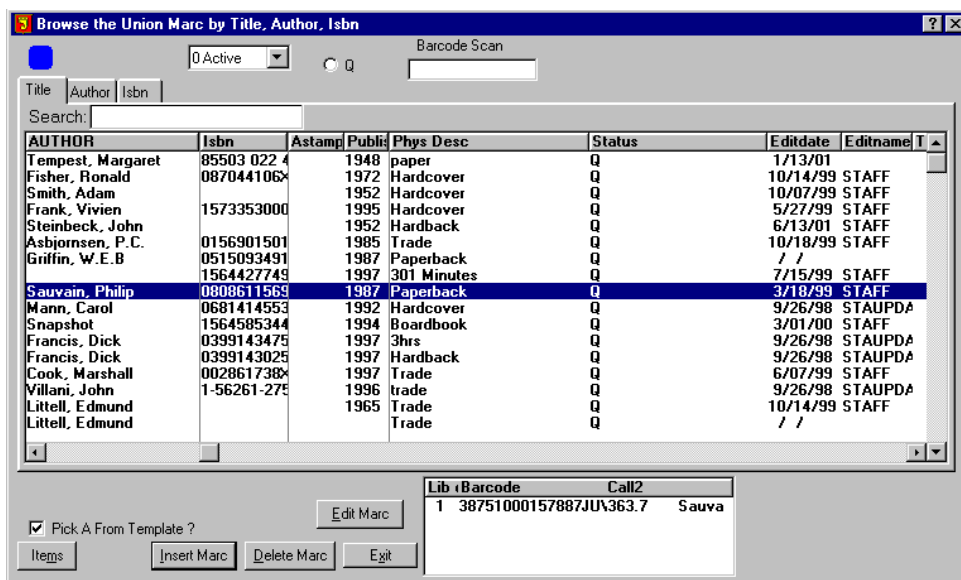
ExpertMarc: The term used for adding and editing records at the **Marc Edit** screen (“expert” is the key word in this instance) when a record has more than two subjects or requires a more a more detailed description. A cataloger/librarian must use his or her judgment when deciding whether ExpertMarc mode is necessary.

The QuickMarc screen (see CatIntro-8, below) is always used to add a new MARC record into the system. It features a form that will hold information for a new MARC record.

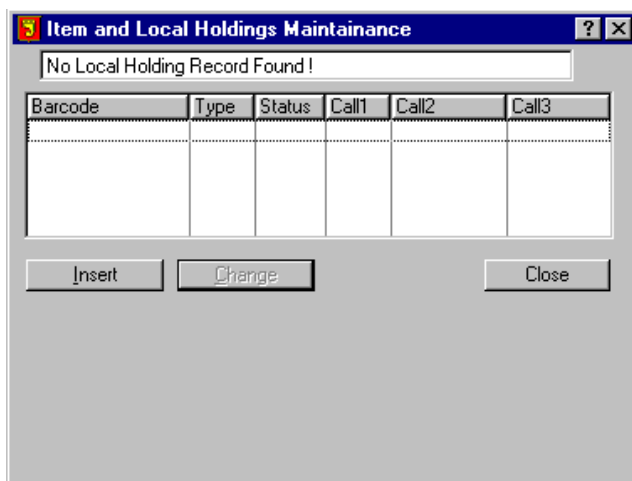
This is the “first item” record only. When a new record is completed by using the QuickMarc option, the system creates an actual catalog record and the first item or holdings record.

NOTE: Once a new record is completed using QuickMarc, a user cannot use the QuickMarc form to go back and change item information. The “Items” button must be used to make subsequent changes.

Additional items (or copies) of a record can be entered using the “Items” button found at the bottom left corner of the **Browse the Union Marc by Title, Author, Isbn** screen (CatIntro-9, below).



This button that leads to the **Item and Local Holdings Maintenance** screen is always used for individual maintenance of every existing record (CatIntro-10, below).



Lesson 1 describes how to create and edit records using the QuickMarc function, while Lesson 3 describes how to use the ExpertMarc to edit existing records. However, before proceeding to these lessons, it is necessary to discuss the functions and differences between the QuickMarc and ExpertMarc options.

How to Access “QuickMarc” and “ExpertMarc”

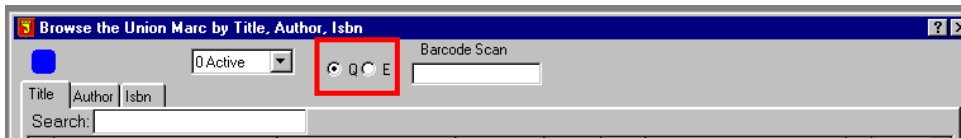
Selecting the leftmost icon (CatIntro-4, again) on the “Catedit” toolbar can access both the QuickMarc and the ExpertMarc editorial menus . . .



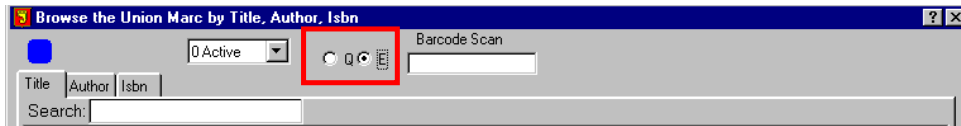
which leads to the **Browse the Union Marc by Title, Author, and Isbn** screen.

Step 1: At the Browse the Union Marc by Title, Author, and Isbn or “Catedit browser” window, select a MARC data record by using the mouse.

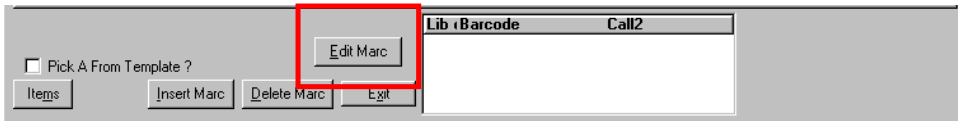
Step 2: At the top of this screen, select “Q” for QuickMarc or “E” for ExpertMarc by clicking the mouse in the circle next to each letter (CatIntro-11, below).



Step 3: The circle next to the “Q” is already set as the default if the record has never been edited in ExpertMarc. To select the ExpertMarc, click on the circle next to the “E” so that it looks like the image that follows (CatIntro-12, below).

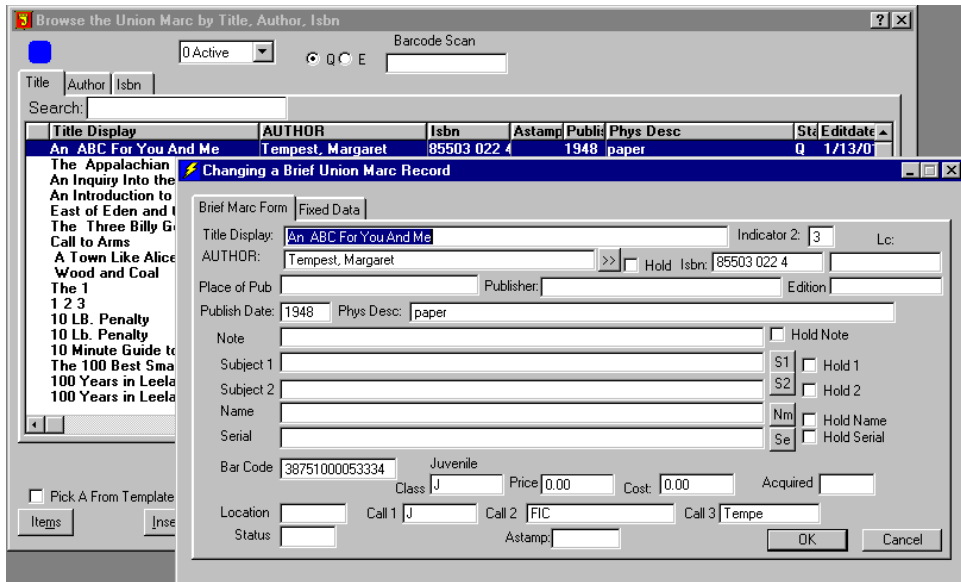


Step 4: Click on the *Edit Marc* button at the bottom of the screen (CatIntro-13, below).

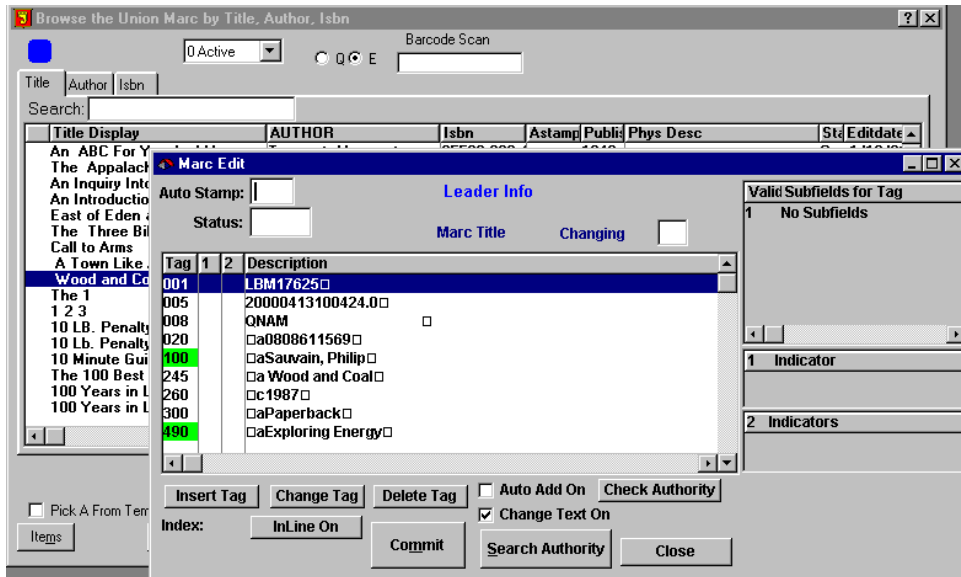


Depending on whether the “Q” or the “E” has been selected, one of two screens will appear:

Changing a Brief Union MARC Record (CatIntro-14, below)



Marc Edit or "Expert Marc" (CatIntro 15, below).



NOTE: Once a record has been changed using the "Expert" editor, the "Quick" Marc list entry screen can never be accessed or used again on that particular entry. The "Expert" editor option elevates an entry made through the "Quick" Marc method to a new editorial level within the database.

Why Use QuickMarc?

The QuickMarc is adequate for entering and editing most records. It requires little knowledge on the part of the user because it is form-based. The form is self-explanatory and easy to use, requiring little action on the user's part.

Reasons to use the QuickMarc are:

- data entry is straightforward, fast, and easy
- it quickly creates a full MARC record and provides the appropriate tags and subfield indicators
- there is no need to know appropriate MARC record tags and subfield indicators
- it is very helpful when entering original catalog information from a shelf list

Why Use ExpertMarc?

While the QuickMarc only provides a fixed format that accommodates limited information, the ExpertMarc requires the use and knowledge of tags and subfield indicators, and has great capabilities.

Some reasons to use ExpertMarc are:

- it provides more options for adding a new record or expanding an existing record
- more detail and description can be provided for each data record
- it provides unlimited access to the use of tags, subfield indicators, and authority lists

Put simply, through the use of the ExpertMarc, library staff who so desire could tag and establish authority for a single existing data record to their heart's content, while library staff with little or no training could use the confines of the QuickMarc form to logically and instinctively edit that same data record. Both entries would be sufficient and acceptable.

Lesson 1: How to Add a Brief Union MARC Record

Catedit Screens

This lesson mainly concerns two Catedit screens shown below (CatLess1-1 and CatLess1-2):

Adding a Brief Union Marc Record

Changing a Brief Union Marc Record

Both screens are comprised of data entry fields that are provided below in a quick-reference list. Later in this lesson, these data entry fields are described in greater detail as they are applied when adding a brief Union Marc record.

Quick-Reference List:

Fields for Adding and Changing Brief Union MARC Records

Although the fields that comprise the two screens, **Adding a Brief Union Marc Record** and **Changing a Brief Union Marc Record** are the same, they appear in different places on each screen. Before working with these screens, it is helpful to become familiar with the fields that you will use.

Title: Title of the record

Offset: Title offset (such as “a”, “an”, “the”) – sets sort sequence (ignores the number of positions, as indicated, starting from the left)

Author: Author's personal name (last name first), such as “Crane, Stephen”

Isbn: ISBN: International Standard Book Number

LC Control #: Library of Congress Control number

Place of Pub: Where the publisher is located (city and state, if city is not well known)

Publisher: Publisher of record

Edition: Number of edition (first, second, etc.)

Year: Year published

Physical Description: Physical characteristics of item in coded form

Note: General note about item (such as “translated in German)

Subject 1: Subject added entry – topical term (phrase describing subject of record), such as “Horses” or “War”

Subject 2: Additional subject

Name: Personal name of someone associated with record, such as the name of an editor or illustrator

Serial: Indicate if part of a series, such as “Bobbsey Twins”

Bar Code: Bar code number of item

Class: Defines type of material (such as “adult”, “children”, etc.) used in circulation system

Price: Price of item (what patrons would be charged for replacement)

Cost: How much library paid for item

Acquired: Where item was acquired (grant identification, donation, bookstore, etc.)

Location: Where item will be found in library

Call 1: Call number (General Collection such as "Adult", "Juvenile", "Music", "Movie")

Call 2: Call number (Dewey number or fiction)

Call 3: Call number (author's last name)

Status: Status of item (such as "on order" or "in storage")

Astamp ("auto stamp"): General description of item (part of a coded list of options such as "large print," "movie", "compact disk," or "reference")

Steps for Adding a Brief MARC Entry

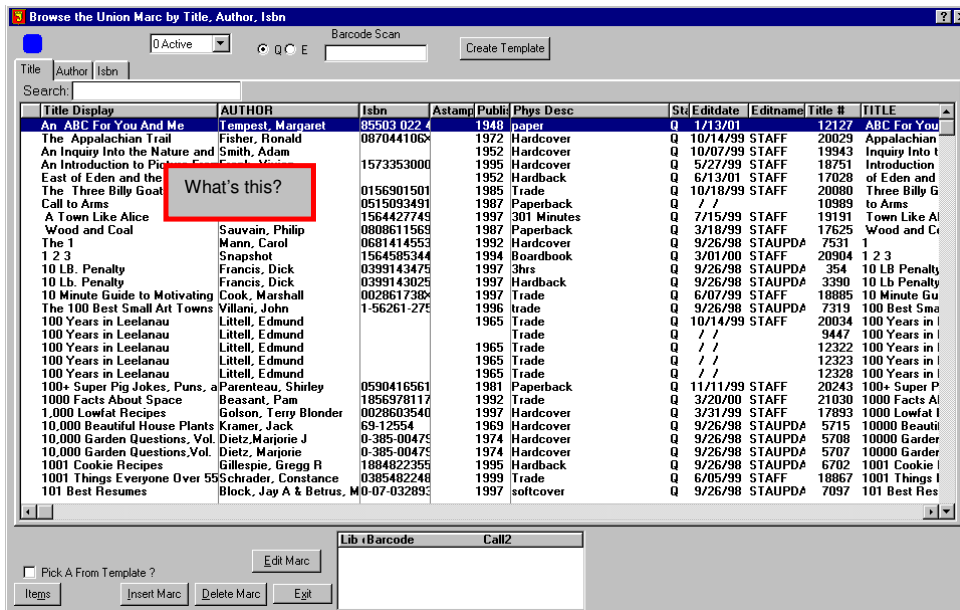
Step 1: Bring up MARC editor

Step 2: Create record

Step 3: Save the brief MARC entry (“New Add”)

Step 4: Commit the record to the database

NOTE ABOUT the “What’s this?” program help feature: When an object has been selected on any Catalog Editor screen, a user can access “help” or an explanation about each the function of that object. **Example:** In an attempt to provide content-sensitive help, the Catalog Editor program makes it possible for a user to right-click the mouse on an object on any screen, to receive information about the function of that object (typically a button or an entry box). Once a user has right-clicked the mouse on an object, a “What’s this?” box appears with an answer to that question. See the image below (CatLess1-3).



Step 1: Bring Up the MARC Editor Screen

NOTE: Before creating a MARC entry, be certain that the item has not already been catalogued. This is important because all copies (or items) share a single catalog record. In a multi-library configuration, all copies in all libraries share a single MARC record.

Open the Catedit program and go to the **Browse the Union Marc by Title, Author, and Isbn** window by selecting the *Menu* entry called *Bibliography Edit*, or by selecting the leftmost icon on the **Catedit** toolbar which looks like a page of text (CatLess1-4, below).



Once it appears, the **Browse the Union Marc by Title, Author, Isbn** window (CatLess1-5, below) features a “browse” list that shows active MARC records in alphabetical order by title, by default (see *Title* tab below). This default can be changed, though, to *Author* or *Isbn*.

Browse the Union Marc by Title, Author, Isbn

0 Active Barcode Scan

Title Author Isbn

Search:

Title Display	AUTHOR	Isbn	Astamp	Public	Phys Desc	Std	Editdate
An ABC For You And Me	Tempest, Margaret	85503 022 4	1948		paper	Q	1/13/01
The Appalachian Trail	Fisher, Ronald	087044106X	1972		Hardcover	Q	10/14/99
An Inquiry Into the Nature and	Smith, Adam		1952		Hardcover	Q	10/07/99
An Introduction to Picture Fram	Frank, Vivien	1573353000	1995		Hardcover	Q	5/27/99
East of Eden and the Wayward	Steinbeck, John		1952		Hardback	Q	6/13/00
The Three Billy Goats Gruff	Asbjornsen, P.C.	0156901501	1985		Trade	Q	10/18/99
Call to Arms	Griffin, W.E.B	0515093491	1987		Paperback	Q	/ /
A Town Like Alice		1564427749	1997		301 Minutes	Q	7/15/99
Wood and Coal	Sauvain, Philip	0808611569	1987		Paperback	Q	3/18/99
The 1	Mann, Carol	0681414553	1992		Hardcover	Q	9/26/99
1 2 3	Snapshot	1564585344	1994		Boardbook	Q	3/01/00
10 Lb. Penalty	Francis, Dick	0399143475	1997		3hrs	Q	9/26/99
10 Lb. Penalty	Francis, Dick	0399143025	1997		Hardback	Q	9/26/99
10 Minute Guide to Motivating	Cook, Marshall	002861738X	1997		Trade	Q	6/07/99
The 100 Best Small Art Towns	Villani, John	1-56261-275	1996		trade	Q	9/26/99
100 Years in Leelanau	Littell, Edmund		1965		Trade	Q	10/14/99
100 Years in Leelanau	Littell, Edmund				Trade	Q	/ /

Lib Barcode Call2

Pick A From Template ? Edit Marc

Items Insert Marc Delete Marc Exit

Step 2: Create the Record

To create a new record, select the button toward the bottom of the window labeled *Insert Marc*. This will bring up the screen labeled, **Adding a Brief Union Marc Record** (CatLess1-6). Remember, the title of this screen indicates that a record will be added (once the *OK* button has been selected).

The screenshot shows a dialog box titled "Adding a Brief Union Marc Record". It features a "Brief Marc Form" with a "Fixed Data" tab. The form contains the following fields and controls:

- Title Display: [Text Field]
- AUTHDR: [Text Field]
- Place of Pub: [Text Field]
- Publisher: [Text Field]
- Edition: [Text Field]
- Publish Date: [Text Field]
- Phys Desc: [Text Field]
- Note: [Text Field]
- Subject 1: [Text Field]
- Subject 2: [Text Field]
- Name: [Text Field]
- Series: [Text Field]
- Bar Code: [Text Field]
- Class: [Text Field]
- Price: [Text Field] (0.00)
- Cost: [Text Field] (0.00)
- Acquired: [Text Field]
- Location: [Text Field]
- Call 1: [Text Field]
- Call 2: [Text Field]
- Call 3: [Text Field]
- Status: [Text Field]
- Astamp: [Text Field]
- Indicator 2: [Text Field]
- Lc: [Text Field]
- Hold: [Text Field]
- Hold Note: [Text Field]
- Hold 1: [Text Field]
- Hold 2: [Text Field]
- Hold Name: [Text Field]
- Hold Series: [Text Field]

Buttons for "OK" and "Cancel" are located at the bottom right of the dialog.

This screen contains a form to be filled out which will result in a catalog entry. Most of the input fields on the form are self-explanatory, such as "Title", "Isbn", "Publisher", etc.

Before filling out this form, read the ensuing sections to gain a better understanding of the data fields and how they pertain to a record.

How To Use the Offset and Author Fields

Some of the not-so-evident fields to be completed on the form are ***Offset*** and ***Author***, which are explained below.

Offset: When displaying the records in title-order on the browse list, you might not want to sort by the first character of the actual first word of the title, especially when it is an article such as “the”, “an”, “a”, etc. For instance, the book, *The Client*, should be sorted by the word “Client” instead of the words “**The Client**.” To establish an “offset” sort, type “4” in the Offset field.

Example: Title: *The Client*, Offset: 4. This will ignore the first four characters (3 characters + 1 space = 4) in the sort sequence. **Example:** The offset for the word “a” would be 2.

Author: When inputting an Author's name, type the last name, then the first name. This is the appropriate bibliographical format. **Example:** Fitzgerald, F. Scott. If the author's name is currently not in the system, a “Choose authority” window will appear to allow the author to be included. See the Sidebar that follows.

NOTE: Although only one *Author* field appears on this screen, along with two *Subject* fields, unlimited subjects and names can be entered by using the “Expert Editor” feature of the Catedit program.

Sidebar: The "Choose Authority" Screen

As a user types information into the *Author*, *Subject*, *Name*, or *Series* fields, if that information has never been entered into the system before, or if there are several instances, say, of a last name already in the system, a **Choose Authority** (CatLess1-7, below) screen will appear.

The purpose of this screen is to ensure that all "authority-controlled" fields are always entered in the exact manner, every time, and to ensure that the authorities already present in the system are used, if applicable.

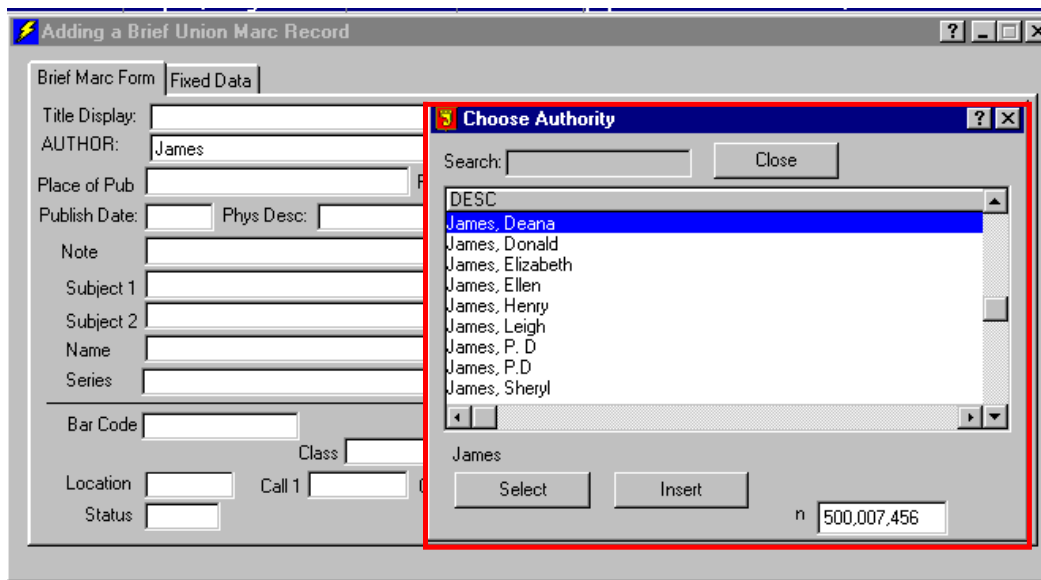
Steps for using the **Choose Authority** screen are:

1. Enter the Information
2. Handle the Authority (Option 1 or Option 2)

Step 1. Enter New Authority Information

Type the information for the new record into the appropriate field. Again, if the information that has been typed into the field is not in the system's authority database, or if the system questions what has been typed, then the **Choose Authority** screen will appear, such as the one below.

It will overlap the **Adding a Brief Union Marc Record** screen.



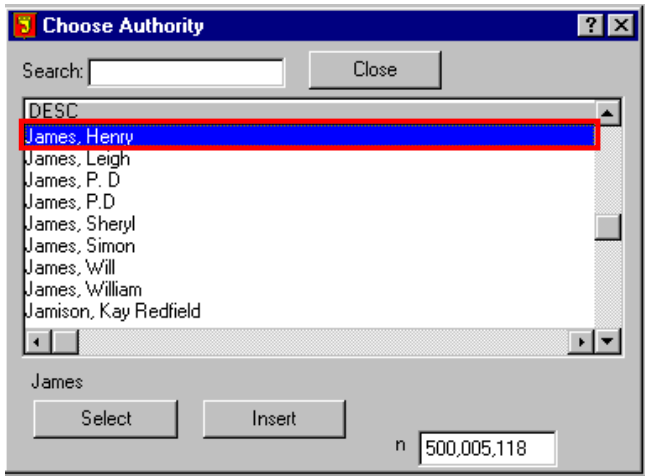
Step 2. Handle Authority

Option 1 – Select an entry from the authority list provided: At this screen, from the list that appears, select the appropriate author's name (or subject, name, or series, depending on the field that has been completed on the **Adding a Brief Union Marc Record** form), then choose the Select button to make the choice "official". The system will take you back to the **Adding a Brief Union Marc Record** screen, and the entry you have selected will appear in its entirety in the appropriate field.

Example: Assume that the title has not been entered yet, but "James" has been entered into the "Author", field, such as shown below. The **Choose Authority** screen appears (see CatLess1-8, below), and "James, Deana" is the first entry the system presents.

The screenshot shows the 'Adding a Brief Union Marc Record' application window. The 'Fixed Data' tab is active, and the 'AUTHOR' field contains the text 'James'. A 'Choose Authority' dialog box is open, displaying a list of authority entries for 'James'. The first entry, 'James, Deana', is selected and highlighted in blue. Below the list are 'Select' and 'Insert' buttons. The dialog also shows a search field with 'James' and a 'Close' button. At the bottom right of the dialog, there is a field containing 'n 500,007,456'.

Since "Henry James" is the desired author, scroll down and select that name from the authority list already in the system, as shown below (CatLess1-9). Choose the *Select* button, and "James, Henry" will now appear in the *Author* field on the **Adding a Brief Union Marc Record** screen.



Option 2 – Add new authority to the list: If the entry you need is not included in the authority list, then type that name into the *Search* box and select *Insert* to add the new entry into the authority list.

Example: The author's last name "Jamieson" (see CatLess1-8 again, below) was typed into the *Author* field at the **Adding a Brief Union Marc Record** screen, and the **Choose Authority** screen brought up the name "Jamison, Kay Redfield" (see below again).

The screenshot shows a window titled "Adding a Brief Union Marc Record". It has two tabs: "Brief Marc Form" and "Fixed Data". The "Brief Marc Form" tab is active. Fields include: Title Display, AUTHOR: (containing "Jamieson"), Place of Pub, Publish Date, Phys Desc, Note, Subject 1, Subject 2, Name, Series, Bar Code, Class, Location, Call 1, and Status. A "Choose Authority" dialog is overlaid on top. It has a search field containing "Jamieson, P.L." and a list of names: Jamison, Kay Redfield (highlighted), Jance, J. A, Jance, J.A, Jane, Pamela, Jankins, Elizabeth, Janovitz, Marilyn, Jans, Nick, Janson, H. W, and Janson, H.W. and Janson, Dora Jane. At the bottom of the dialog are "Select" and "Insert" buttons, both highlighted with red boxes. A "Close" button is also visible. A small box at the bottom right of the dialog shows "n 500,006,538".

Because Kay Redfield Jamison's name was brought up, and the name "Jamieson" was not, it is safe to assume that "Jamieson" is probably not in the system's authority lists. But, just to be certain, type the desired name into the *Search* bar (see above), then press the *Tab* key on your keyboard to see if the name exists in the existing authority database. Because the name "Jamieson" appears at the bottom of the screen, just above the *Select* button (see above), it is clear that the search for this last name yielded nothing. Now it is time to "insert" this new name into the system's authority list of authors. Do this by choosing the *Insert* button (see above). The system takes you back to the Choose Authority list, which provides an "auto-select" list that includes the new entry. Choose the *Select* button to finally select your new authority entry. The system takes the entry back to the *Author* field on the **Adding a Brief Union Marc Record** screen.

Detailed Data Field Descriptions

ESSENTIAL READING: Read this section before completing the quick form, and especially before going on to Step 3: Save the Record.

SPECIAL NOTES ABOUT THIS SECTION

REFERENCE NOTE: All USMARC tags, indicators, and subfield codes are contained in the *USMARC Format for Bibliographic Data* at the Library of Congress web site:
<http://lcweb.loc.gov/marc/bibliographic>.

NOTE 1: Anything entered into the *Title, Author, Note, Subject, Name, or Series* fields will be searchable through the On Line Public Access Catalog (OPAC) keyword search screen.

NOTE 2: Most fields have pop-up list boxes associated them. These lists function to standardize entries made in the fields. Such a list only will appear, though, if a character is typed into the field. If the field is left completely blank, then you may proceed to the next field without having to select information from the list to include in that field.

Optional fields: Price, Cost, Acquired, Location, Status, and Stamp.

Required fields: Class, Call 1, Call 2, and Call 3.

Barcode: The item's bar code.

Class: Defines the type of material for an item -- this field allows the circulation system to apply rules set up for this type of material. **Examples:** "Adult" material and "juvenile" material.

Price: The retail price of the item (same as the amount charged to a patron for replacing an item) -- this field is used by the circulation system to indicate fair market value when it is necessary to bill a patron for item replacement.

Cost: The actual amount the library paid to purchase the book; also used for collection valuation and financial audits.

Acquired: Describes how the material was acquired, such as from a bookstore, by donation, etc. (Optional.) Also used to track grant purchases -- assigns a library-defined code, indicating the acquisition source and used to indicate donations, items purchased within a specific grant, etc. Reports can be generated by selecting items through such a code.

Location: Describes where this item is located in the library. (Optional)

Status: Describes the current status of the copy (item), such as "on order," "interlibrary loan," "out of print," etc., and assigns a library-defined code to indicate copy. Such a code is displayed when viewing the library catalog. This status is only used for "on order," "additional copy on order," "in storage," etc. It is NOT used for inactive items.

Stamp (Astamp) or GMD (General Material Designation field, Tag 245 Subfield h): Special description of the type of material, such as “CD”, “VHS”, “REF”, etc. – appears next to the item on the OPAC list.

Call 1, Call 2, Call 3: Call number(s) for an item that refers to text on the spine label. Call numbers indicate the location where and the sequence in which items are shelved. All call numbers must correlate to the information found in the online card catalog.

Call 1

Designates the specific collection. It is normally left blank for “Adult,” and marked “J” or “J+” for “Juvenile,” “VHS” or “DVD” for movie collections, and “CD for “Compact Disks,” etc. If a collection of materials are separate from the regular collection, it should be indicated here.

Call 2

Used to indicate the Dewey number assignment or fiction. **Examples:** “FIC” for “Fiction”, “Western”, “Sci-Fi”, “Pop”, “Show Music,” etc.

Call 3

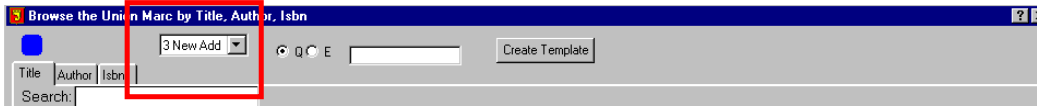
Used for the author's last name – typically the first five characters of the name.

Keeping the above detailed data descriptions in mind, it is time to finish creating a record by filling out the brief MARC form as thoroughly as possible.

Step 3: Save the Record

Once all of the relevant information has been entered onto the brief entry form, select **OK** to save the record into the “New Add” section of the system.

Access the “New Add” section at the **Browse the Union Marc by Title, Author, Isbn** screen by selecting **3 New Add** from the drop down menu (see CatLess1-10, below).



Once you have saved the record, the **Browse the Union Marc by Title, Author, Isbn** window will reappear.

Step 4: Commit Newly Added and Saved Records

At the end of every cataloging session, it is necessary to wrap up that session by committing all of the newly added records ("new adds") to the system. Following are the steps for committing new adds.

1. Return to the New Add section: If you have left your new add session and closed out of the Browse the Union Marc by Title, Author, Isbn window, then start again by clicking on the "page" icon (CatLess1-4), which will bring up the **Browse the Union Marc by Title, Author, Isbn** screen.



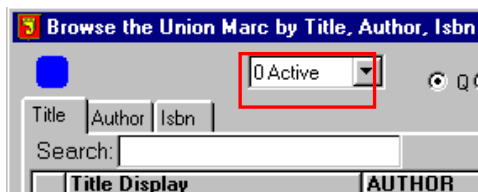
SPECIAL NOTES ABOUT THIS SECTION

NOTE: One MARC record can have unlimited copies (or item records). Within a multi-library system, all of the libraries share the same MARC record. Each item's (copy's) information will indicate its location.

NOTE: A brand new record does not immediately appear in the **Browse the Union Marc by Title, Author, Isbn** window. All newly entered materials are initially put into the Union (or Local) Catalog record type ("New Add") section to give the cataloger an opportunity to edit the record before it appears in final form in the rest of the catalog. This feature is especially useful when providing catalog training because the trainee's work can be reviewed before it is entered into the database.

2. Pull down the pertinent menu: Click on the down arrow next to the box with *0 Active* in it to pull down a list with four choices (see CatLess1-11, below):

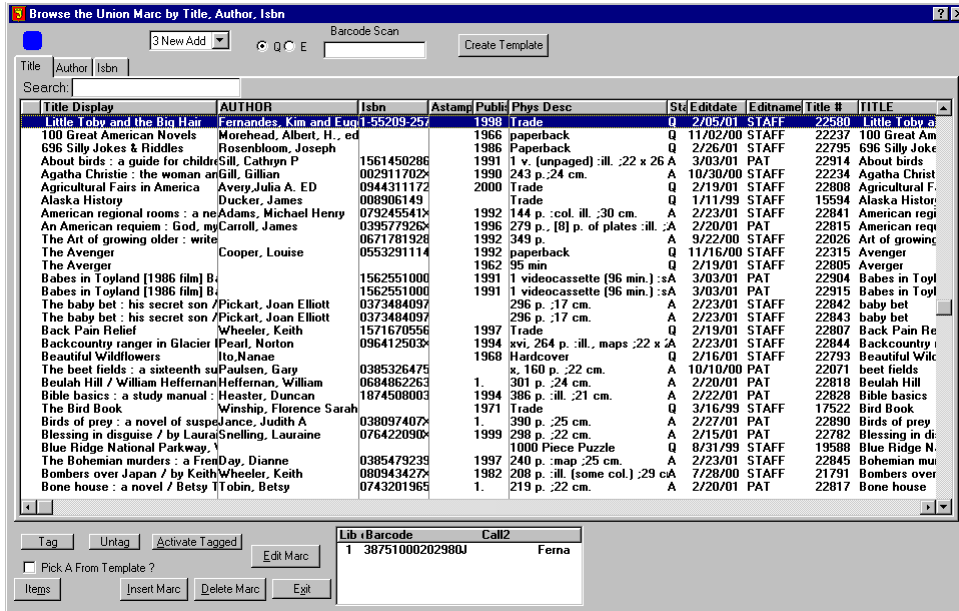
- 0 Active
- 1 On loan
- 2 Weeded
- 3 New Add



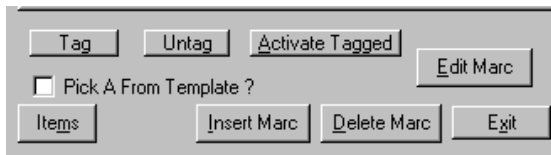
3. Change the 0 Active button to 3 New Add (CatLess1-10, below).



This will bring up a screen containing new entries or new adds that are ready to be committed to the database (CatLess1-12, below).



At the bottom of the screen are three buttons -- "Tag", "Untag", and "Active Tagged" (CatLess1-13).



4. Highlight each entry to be committed: With the mouse, highlight each entry that you wish to commit, and select the *Tag* button to tag each entry. Once selected, each tagged entry will have an "X" next to it (CatLess1-14, below).

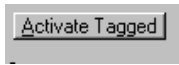
NOTE: The *Untag* button can be used to "deselect" an item that was previously selected so that it does NOT become part of the MARC.

The screenshot shows a software window titled "Browse the Union Marc by Title, Author, Isbn". It contains a table with columns: Title Display, AUTHOR, Isbn, Astamj, Public, Phys Desc, St, Editdate, Editname, Title #, and TITLE. The table lists various books, including "Little Toby and the Big Hair", "100 Great American Novels", "696 Silly Jokes & Riddles", "About birds: a guide for children", "Agatha Christie: the woman and Gillian", "Agricultural Fairs in America", "Alaska History", "American regional rooms: a ne", "An American requiem: God, my", "The Art of growing older: write", "The Avenger", "The Averger", "Babes in Toyland [1986 film] B", "Babes in Toyland [1986 film] B", "The baby bat: his secret son", "The baby bat: his secret son", "Back Pain Relief", "Backcountry ranger in Glacier", "Beautiful Wildflowers", "The beet fields: a sixteenth su", "Beulah Hill / William Heffernan", "Bible basics: a study manual", "The Bird Book", "Birds of prey: a novel of suspe", "Blessing in disguise / by Laur", "Blue Ridge National Parkway", "The Bohemian murders: a Fren", "Bombers over Japan / by Keith", and "Bone house: a novel / Betsy".

At the bottom of the window, there are several buttons: "Tag", "Untag", "Activate Tagged", "Edit Marc", "Lib Barcode", "Call2", "Items", "Insert Marc", "Delete Marc", and "Exit". The "Tag", "Untag", and "Activate Tagged" buttons are highlighted with a red box.

Step 5: Activate the tagged entries.

When all of the entries that you wish to process have been tagged, **select the *Activate Tagged*** button (see CatLess1-15 below and CatLess1-14 on previous page).



NOTE: The "Activate Tagged" step is an insurance procedure because it gives a user has one last chance to make any changes before activating the entry or, if a user is interrupted when making new entries, he or she will be able to refer back to the *New Add* area.

These records are now officially in the system because they have automatically been moved into the active catalog. If all of the above steps have been completed properly, the *New Add* window of the **Browse the Union Marc by Title, Author, Isbn** screen should be empty.

Holdings Maintenance and Entering a Second Copy Into the System

Once a MARC record exists, the bottom section of the **Adding a Brief Union Marc Record/Changing a Brief Union Marc Record** screens (CatLess 1-16, shown below) cannot be touched again by a user. Information on that portion of the screen is actually input on that screen (the **Adding a Brief Union Marc Record** screen) once -- for the FIRST item only. After an item has been added for the first time, all maintenance/changes must be completed using the **Item and Local Holdings Maintenance** screen (see the next page for a copy of this screen).

The screenshot shows a form with the following fields and buttons:

- Bar Code:
- Class:
- Price:
- Cost:
- Acquired:
- Location:
- Call 1:
- Call 2:
- Call 3:
- Status:
- Astamp:
- Buttons: OK, Cancel

Following a maintenance session, the changed information will appear at the bottom of the **Changing a Brief Union Marc Record** screen, but again, this portion of the screen is disabled and users are unable to change the information unless they use the **Item and Local Holdings Maintenance** screen.

Explanations of the data entry fields used when entering items on the **Record/Changing a Brief Union Marc Record** and the **Item and Local Holdings Maintenance** screens follow.

Bar Code: Bar code number of item

Class: Defines type of material (such as “adult”, “children”, etc.) used in circulation system

Price: Price of item

Cost: How much library paid for item

Acquired: Where item was acquired

Location: Where item will be found in library

Call 1: Call number

Call 2: Call number

Call 3: Call number

Status: Status of item (such as “on order”)

Astamp (“auto stamp”): General description of item (such as “large print,” “movie”, “compact disk,” or “reference”)

To add a second copy (item) for a particular record, take the following steps.

1. At the **Browse the Union Marc by Title, Author, Isbn** screen, select the record title for which you wish to add a copy, such as *A Town Like Alice*, as shown below (CatLess1-17).

The screenshot shows a software interface for managing library records. The main window is titled "Browse the Union Marc by Title, Author, Isbn". It features a search bar and a table of records. The table has columns: Title Display, AUTHOR, Isbn, Astamp, Public, Phys Desc, Std, Editdate, Editname, Title #, and TITLE. The record for "A Town Like Alice" is selected. An "Item and Local Holdings Maintenance" dialog box is overlaid on the table, showing fields for Barcode (38751000172548), Type (VHS), Status (VID), Call1, Call2 (TOW), and Call3. The dialog also has "Insert", "Change", and "Close" buttons. At the bottom of the main window, there are buttons for "Items", "Insert Marc", "Delete Marc", and "Exit".

Title Display	AUTHOR	Isbn	Astamp	Public	Phys Desc	Std	Editdate	Editname	Title #	TITLE
An ABC For You And Me	Tempest, Margaret	85503 022 4		1948	paper	Q	1/13/01		12127	ABC For You
The Appalachian Trail	Fisher, Ronald	087044106x		1972	Hardcover	Q	10/14/99	STAFF	20029	Appalachian
An Inquiry Into the Nature and	Smith, Adam			1952	Hardcover	Q	10/07/99	STAFF	19943	Inquiry Into t
An Introduction to Picture Fram	Frank, Vivien	1573353000		1995	Hardcover	Q	5/27/99	STAFF	18751	Introduction
East of Eden and the Wayward	Steinbeck, John			1952	Hardback	Q	6/13/01	STAFF	17028	of Eden and
The Three Billy Goats Gruff	Asbjornsen, P.C.	0156901501		1985	Trade	Q	10/18/99	STAFF	20080	Three Billy G
Call to Arms	Griffin, W.E.B	0515093491		1987	Paperback	Q	/ /		10989	to Arms
A Town Like Alice		1564427749		1997	301 Minutes	Q	7/15/99	STAFF	19191	Town Like A
Wood and Coal	Sauvain, Philip	0808611569		1987	Paper					
The 1	Mann, Carol	0681414553		1992	Hard					
1 2 3	Snapshot	1564585344		1994	Boar					
10 Lb. Penalty	Francis, Dick	0399143475		1997	3hrs					
10 Lb. Penalty	Francis, Dick	0399143025		1997	Hard					
10 Minute Guide to Motivating	Cook, Marshall	002861738x		1997	Trade					
The 100 Best Small Art Towns	Villani, John	1-56261-275		1996	trade					
100 Years in Leelanau	Littell, Edmund			1965	Trade					
100 Years in Leelanau	Littell, Edmund			1965	Trade					
100 Years in Leelanau	Littell, Edmund			1965	Trade					
100 Years in Leelanau	Littell, Edmund			1965	Trade					
100+ Super Pig Jokes, Puns, a	Parenteau, Shirley	0590416561		1981	Pape					
1000 Facts About Space	Beasant, Pam	1856978117		1992	Trade					
1,000 Lowfat Recipes	Golson, Terry Blonder	0028603540		1997	Hard					
10,000 Beautiful House Plants	Kramer, Jack	69-12554		1969	Hard					
10,000 Garden Questions, Vol.	Dietz, Marjorie J	0-385-00475		1974	Hard					
10,000 Garden Questions, Vol.	Dietz, Marjorie	0-385-00475		1974	Hard					
1001 Cookie Recipes	Gillespie, Gregg R	1894822355		1995	Hard					
1001 Things Everyone Over 55	Schradler, Constance	0385482248		1989	Trade					
101 Best Resumes	Block, Jay A & Betrus, M	0-07-032893		1997	softc					

2. Select the **Items** button from the bottom of the screen. This takes you to the **Item and Local Holdings Maintenance** screen (see overlapped screen shot, above).

At this screen, you have two options:

- Option 1: Insert a Copy
- Option 2: Update a Record

Option 1 – Insert a Copy

At the **Item and Local Holdings Maintenance** screen, select the **Insert** button to go to the **Update Items** screen (see CatLess1-18, below).

Update Items

Barcode: | _____ Date Added: 11/01/2001

Type: _____

Call1: _____ Call2: _____ Call3: _____

Price: 0.00 Life to Date Circulation: 0

COST: 0.00 Year to Date Circulation: 0

Status: _____

Location: _____

Hacode: _____

Record will be Added

There are no reserves on this item.

1

Now, enter all item information pertinent to this new copy such as bar code, type, call number, price, etc. Hit the **OK** button, and an additional copy will be included in the system and attached to the original MARC record.

Option 2: Update a Record

To update a record, select the **Change** button (rather than the **Insert** button) at the **Item and Local Holdings Maintenance** screen (CatLess1-19, below).

Barcode	Type	Status	Call1	Call2	Call3
38751000172548	VHS		VID		TOW

Buttons:

Direct Access by Barcode:

This also leads to the **Update Items** screen, but now, the information for the existing item is displayed and can be changed. Press the **OK** button and all changes will be automatically saved (CatLess1-20, below).

Barcode: 38751000172548 Date Added: 7/15/1999

Type: VHS VideoCassettes

Call1: VID Call2: Call3: TOW

Price: 39.99 Life to Date Circulation: 18

COST: 0.00 Year to Date Circulation: 18

Status: Location:

Hacode: BT Baker And Taylor
Record will be Changed

There are no reserves on this item.

Buttons:

FINAL NOTE: This is a good time to print spine labels for newly added items. See **Lesson 2** for instructions.

Lesson 2: Printing Spine Labels

NOTE: Print spine labels only **AFTER** proofreading and correcting all newly added records. Once proofreading is finished, close the Browse the Marc Union window.

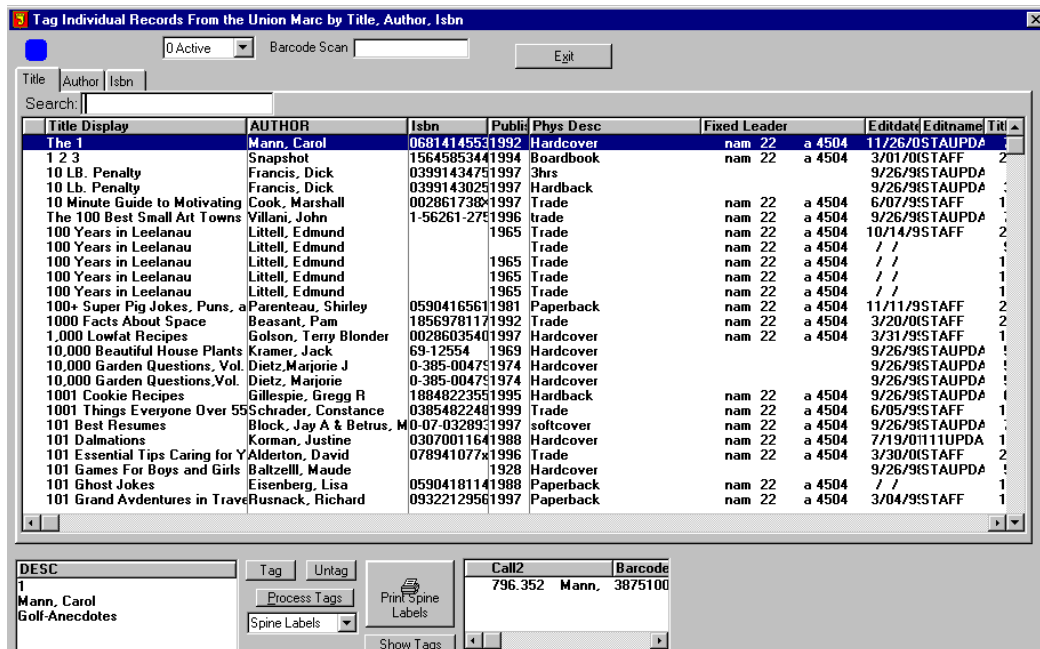
Step 1: Open Reports Menu

From the main menu bar at the top of the screen (CatLess2-1, below), select the **Reports** button, then select **Tag Titles** from the following pull-down list:



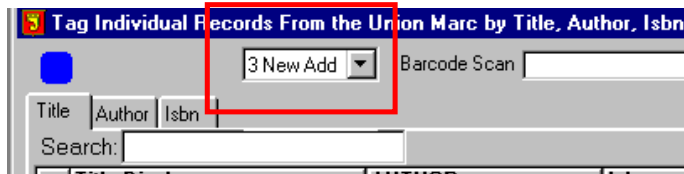
- Tag Titles
- Call Number Report
- New Add Report
- Item Spine labels report
- Check Union Catalog for Authority Links
- Review Marc Records by Group

This will bring up a screen titled, **Tag Individual Records from the Union Marc** (CatLess2-2, below).



Step 2: Select Type of Record for Labeling

At this window, change the box labeled *0 Active* to *3 New Add* (CatLess2-3, below).



NOTE: Spine labels can be printed for active, on loan, and weeded books as well. Simply use the window referred to above to choose a different item status from this list:

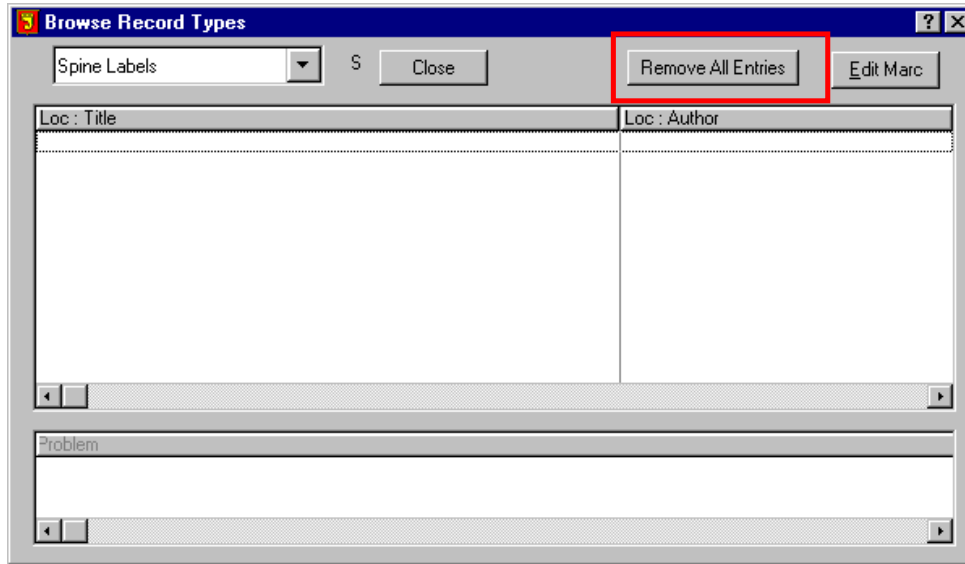
- 0 Active
- 1 On Loan
- 2 Weeded
- 3 New Add

Step 3: Show Tags

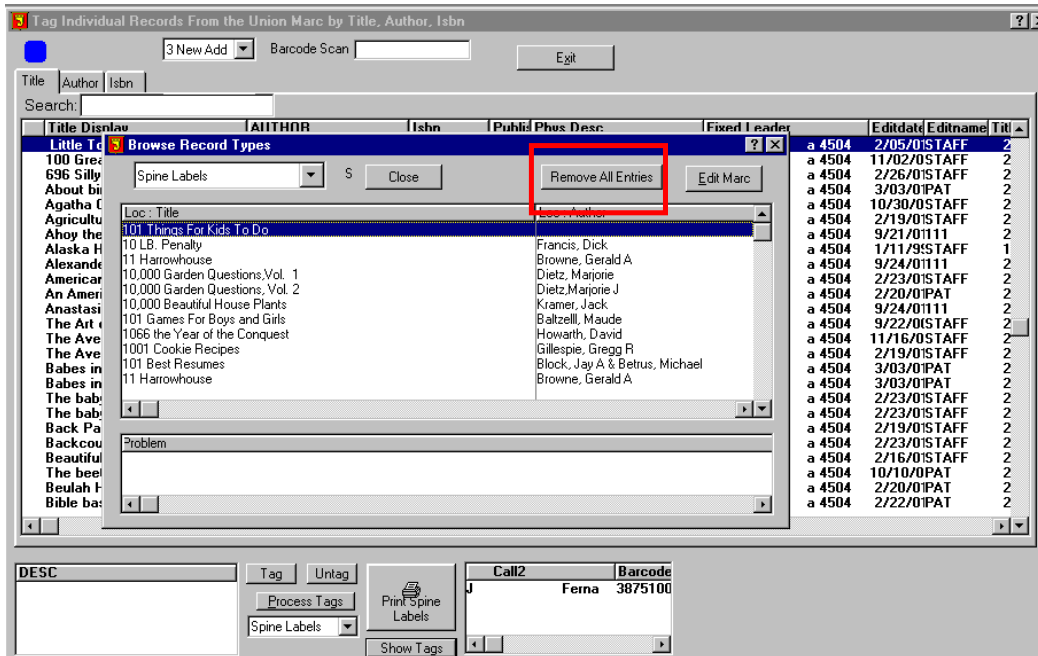
Click on the *Show Tags* button (CatLess2-4, below) at the bottom of the window.



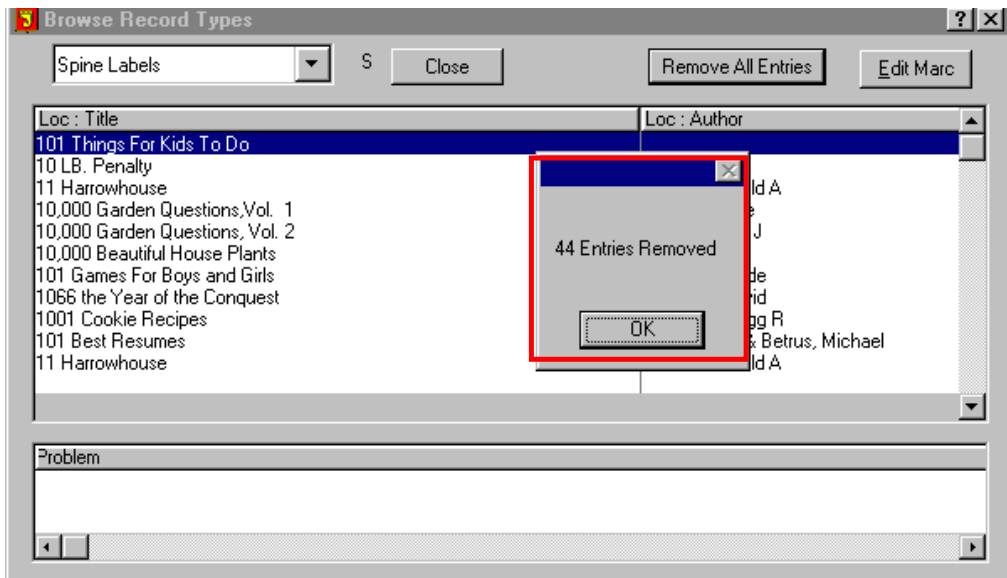
At this point, if NO titles appear in the **Browse Record Types** window (such as shown in CatLess2-5, below), click on the *Close* button and continue to Step 4.



If titles DO APPEAR in this window, they probably were left over from a previous label print session. As such, it is necessary to click on the **Remove All Entries** button (see CatLess2-6, below) so that you can start fresh with your own label printing session.

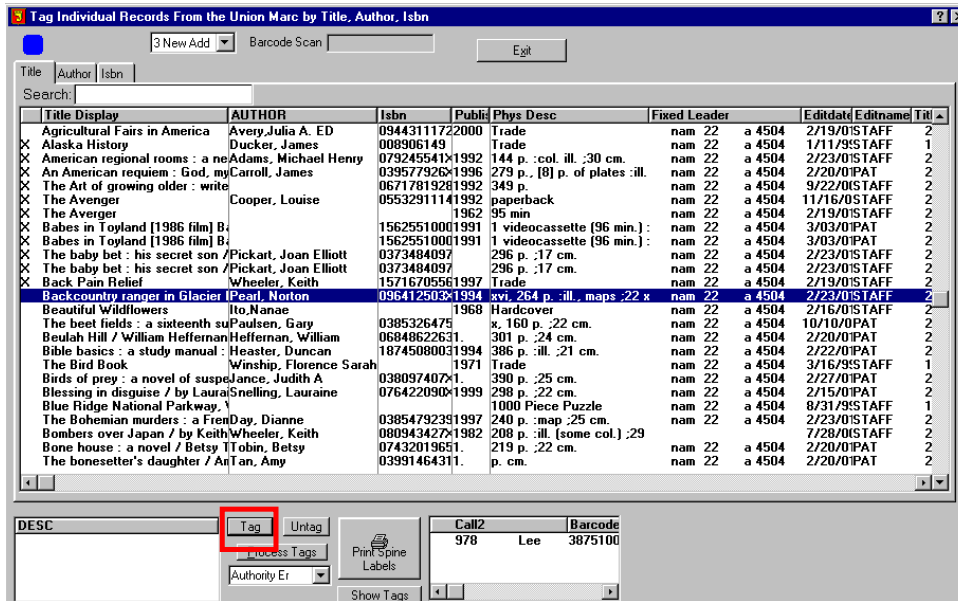


A small window containing the number of entries removed will appear (see CatLess2-7, below). Click on **OK**, then **Close**, and the **Tag Individual Records . . .** window will reappear.



Step 4: Tag Entries

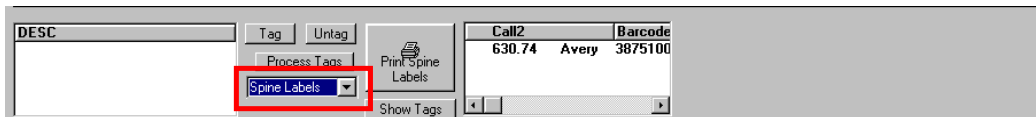
Now, start "tagging" entries by highlighting each one that you wish to label. Do this by clicking on the **Tag** button. The system automatically will move down to the next record. Tagged entries will look like those below (see titles with "X" next to them in CatLess2-8, below).



Step 5: Select Label Type to be Printed

Next, from the box found at the bottom of the **Tag Individual Records . . .** screen (see CatLess2-9, below), select the correct type of label to be printed from this list:

- Spine Labels
- Export Marc
- Hot Titles
- Authority Er

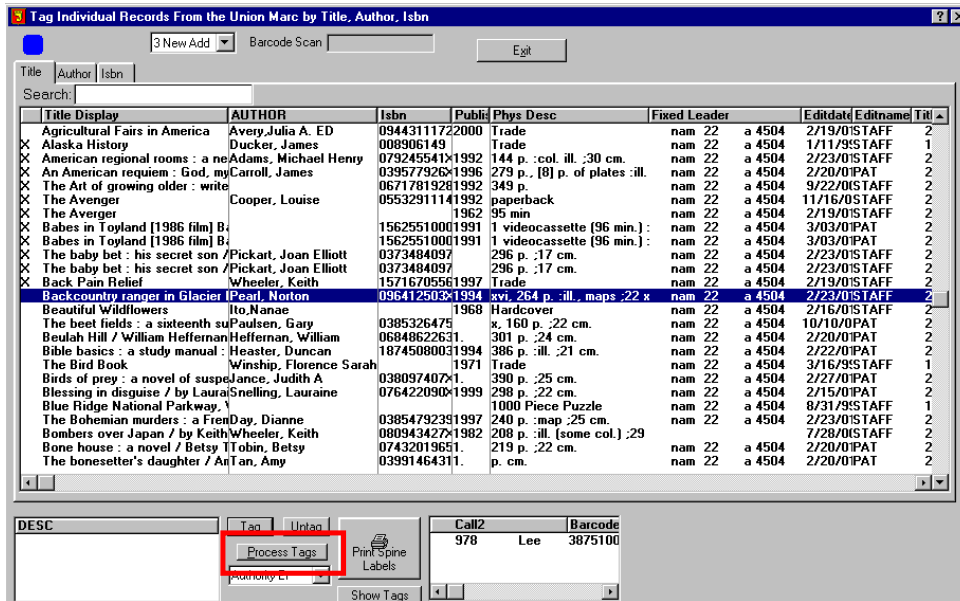


Spine Labels is the proper choice.

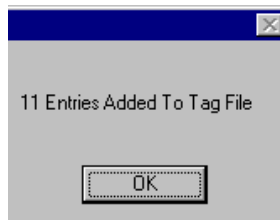
NOTE: Although there are three other types of labels provided as a choice, *Export Marc*, *Hot Title*, and *Authority Er* are currently not implemented.

Step 6: Process Tags

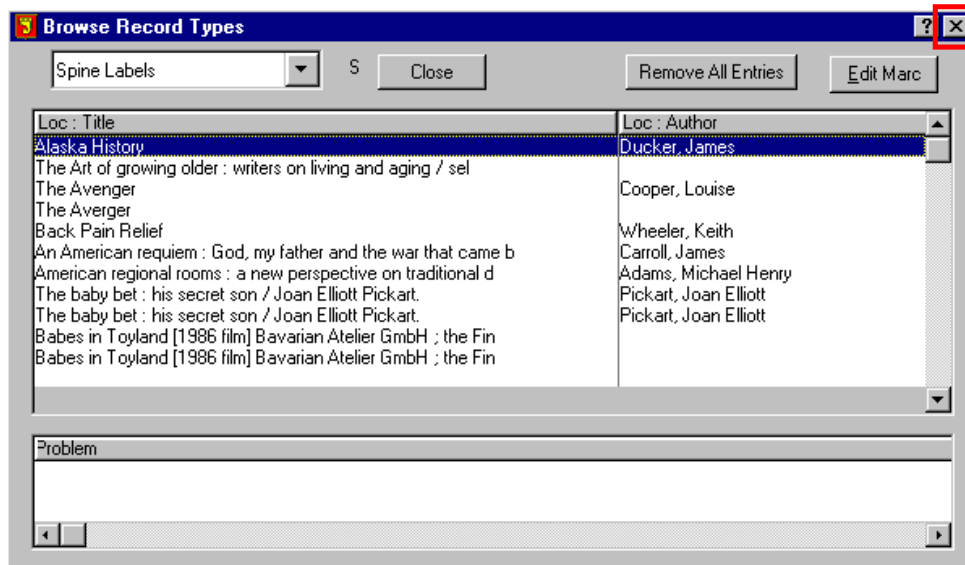
Once each item has been tagged and the type of label has been selected, click onto the **Process Tags** button (CatLess2-8, below) and a window showing how many records were tagged will appear. Click on the **OK** button in that tiny window.



CatLess2-10:



NOTE: At this point, as a system of checks and balances, a user can select the *Show Tags* button to call up the **Browse Record Types** screen to confirm which titles have been selected for spine labels (CatLess2-11).

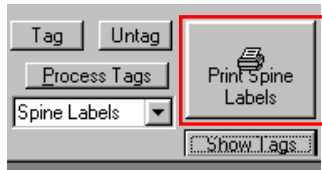


Step 7: Prepare to Print

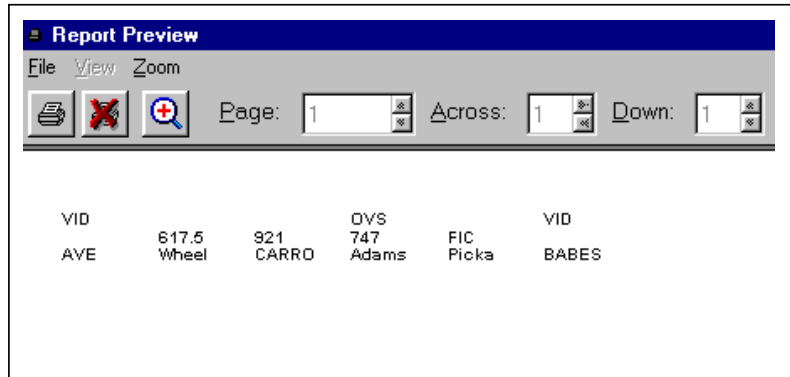
Exit out of the **Browse Record Types** screen to continue on by clicking on the X or “exit” button next to the ? button in the very upper right corner of the screen (see CatLess2-11 again, above).

Step 8: Preview Print Report

Continuing on, click on the button labeled, *Print Spine Labels* (CatLess12, below).



A **Report Preview** window (CatLess2-13, below) appears, showing how the label sheets will look, once printed.

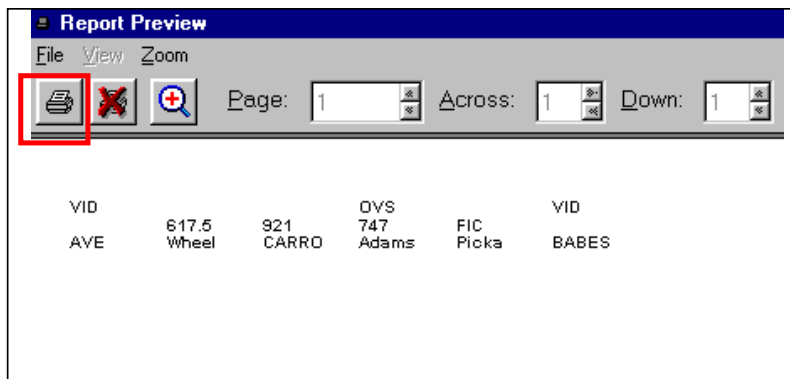


You are now ready to print the labels.

NOTE: Remember, each sheet of label stock has 64 labels. Load label stock face down in the paper tray of the printer and be certain that the printer is turned "On". To determine how many pages of label stock are needed, click on the "up" arrow in the *Page* window (CatLess2-11, below). Click until the final page is reached and that will indicate how many pages there are.

Step 9: Print Labels

Double-click on the printer icon in the upper left corner of the screen and the labels will begin to print (CatLess2-13 again, below).



Helpful Hints

Be careful not to smudge the labels as they come out from the printer because they are wet for a moment before the ink sets. Allow them to air dry a few moments before using them. The program will automatically return to the window where the records will be tagged once printing is finished. This is a safety mechanism that makes it difficult for users to accidentally reprint the same labels.

If it is necessary to reprint labels for some reason, then repeat Step 2 above, and tag only those records that need to be reprinted.

If you haven't done so yet, commit any new-adds to the database. See Lesson 1 for instructions.

Step 10: Close Window

Close the window titled, **Tag Individual Records from the Union Marc . . .**

Lesson 3: How to Edit a Union MARC Entry

Note: There are two methods for editing an existing MARC entry – the QuickMarc method and the ExpertMarc method. To review the different features and reasons to use each method, re-read the section titled “Adding or Changing a Brief MARC Entry Versus Editing a MARC Entry in “Expert” mode found in the “Introduction” chapter of this guide.

Introduction

Once a MARC record has been created using the method described in Lesson 1, a user can continue to edit that record with the brief, form-based MARC record editor, which should be sufficient for most general MARC record data entry. The brief MARC record entry form is designed to enable a user to enter MARC records with a minimal amount of training and should suffice for most materials. Once a record is entered using the quick-form method, it might not be necessary to revisit that record again. However, if a record requires further detail, description, additional names, or subjects, the “Expert” or “List” editor can be used. Although the “Expert” editing feature is powerful, it is easy to use, but remember, once a record has been edited in “Expert” mode, it can no longer be displayed in a “QuickMarc” format, even if it was originally created using the “Quick” MARC form.


Catedit Screens

This MARC entry editorial section concerns the following Catedit functions and screens:

Browse the Union Marc by Title, Author, or Isbn

Changing a Brief Union MARC Record

Marc Edit, better known as “ExpertMarc” or the “Expert” editor



Deleted: :\$1
\$1
\$1

The **Browse the Union Marc by Title, Author, or Isbn** screen is used to search for and select entries already in the database. Go to this screen (CatLess3-1, below) by selecting the icon (CatLess3-2, below) that looks like a book or a page of text at the top of the **Lib/Net** system entry screen of the Catalog Editor program.



Browse the Union Marc by Title, Author, Isbn

Active [0] Barcode Scan []

Title Author Isbn

Search: []

Title Display	AUTHOR	Isbn	Astamp	Public	Phys Desc	Stat	Editdate
A Walk Through The Fire	Muller, Marcia	1556611225		1999	Lease, Audio	Q	/ /
A Woman Named Damaris	Oke, Janette	0027363511		1991	Trade	Q	9/26/91
Aaron's Shirt	Gould, Deborah	0840777965		1989	Hardcover	Q	9/26/91
Abaddon	Larson, Bob			1993	Trade	Q	9/26/91
Abbott and Costello Show				1978	50 min	Q	9/26/91
ABC / Ann Geddes.	Geddes, Anne	1559120053		1995	1 v. (unpaged) : col. ill. ; 2E	ZE	5/17/00
ABC & Counting Rhymes	Wonderbooks	0843132647			Hardcover	Q	1/11/81
ABC Go!	Collier's Junior Classics			1962	Hardcover	Q	12/21/79
The A.B.C. Murders	Christie, Agatha	0671553623		1970	Paperback	Q	9/26/91
The ABC's Of Goldfish	Teitler, Neal	0866227636		1986	Hardcover	Q	3/22/01
The ABC's of Managing your M	Pond, Jonathan D. CPA	1884383009		1993	Trade	Q	9/26/91
ABC's of Nature	Readers Digest	0895771691		1984	Hardcover	Q	9/26/91
ABC's of the Human Body	Reader's Digest	089577220		1987	Hardcover	Q	12/30/79
The ABC's of Victorian Antique	DiImperio, Dan	0396069258		1974	Hardcover	Q	9/26/91
The Abduction	Grippando, James	0061097489		1998	Paperback	Q	3/19/91
Abe Lincoln of Pigeon Creek	Wilson, William				Hardcover	Q	9/26/91
Abe Lincon's Hat	Brenner, Martha	0679849777		1984	Trade	Q	/ /

Lib Barcode Call2
1 3875100094429J Brenn

Pick A From Template ?

Items Insert Marc Delete Marc Edit Marc Exit

A brief description of each entry on this screen follows. Become familiar with this screen, because it probably is accessed more often than any other screen in the CatEdit program.

Options box labeled, "0 Active": Pulls down to reveal options "1 On Loan," "2 Weeded," "3 New Add"

•Q •E: "Editor" option: Change from "Q" for "quick-edit" mode to "E" for "expert" edit mode.

Barcode Scan: Locates a Marc record through one of its associated copies (barcodes).

Used in conjunction with the *Search* button are these tabs:

Title: Choose a record from a list of records by title.

Author: Choose a record from a list of authors.

Isbn: Choose a record from a list of ISBN numbers.

Search: Searches the database for a typed in title, author, or ISBN number.

Columns labeled – Title, Author, Isbn, Astamp, Date, Description, QE, Editdate:

Deleted: ¶

Edit Marc: Edit a selected entry.

Box with Lib, Barcode, and Call #: Self-explanatory entries.

Items: Stands for the “Items and local holding maintenance” authority screen.

Insert Marc: Inserts a new record.

Delete Marc: Deletes a record.

Exit: Exits an editorial session.

How to Change a Brief Union MARC Record Using the Expert Editor

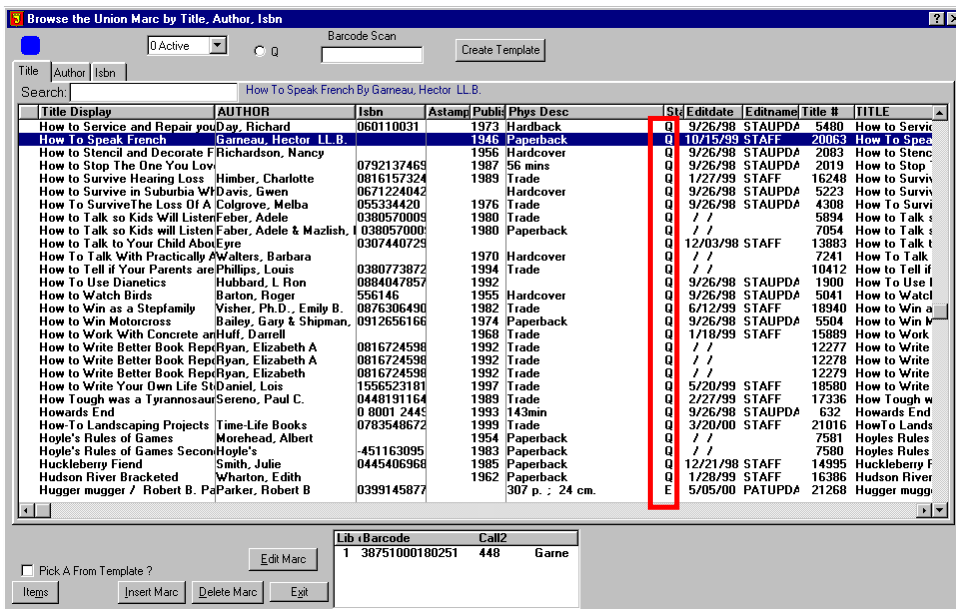
NOTE: For a more in-depth refresher about how to add or change a brief MARC entry versus editing a MARC Entry in "Expert" mode, refer to Lesson 1 in this guide, "How to Add a Union MARC Record."

To edit a brief MARC record in "quick edit" mode, follow these steps.

- Step 1: Select Entry/Title
- Step 2: Edit Entry by Using Quick Form
- Step 3: Update the Record

Step 1: Select Entry/Title

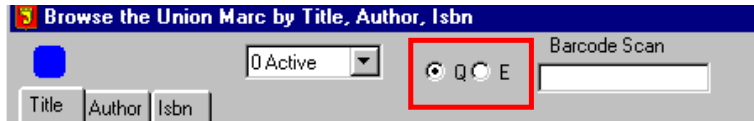
At the **Browse the Union Marc by Title, Author, Isbn** screen, select the entry or title that you wish to edit by placing the cursor on that item. As an example, *How To Speak French* by Garneau, Hector, L.L.B. has been selected (highlighted in dark blue – see CatLess3-3, below).



NOTE: Notice that in the *Status* or *St* column all the way to the right of this title, the letter *Q* has been entered by the system, which indicates that this record has been edited in "QuickEdit" mode and is in the "quick" format. "E" means that the record is in the "Expert" format.

Before proceeding, remember to make certain that the circle next to the **Q** (which is the default setting) at the top of the screen (**Q** for "Quick Edit", CatLess3-10, below) is already highlighted or darkened. If it is not, then the entry can only be edited in "Expert" mode (CatLess3-4, below).

Examples: "Quick Edit" mode or QuickMarc = ●Q ○E
"Expert Edit" mode or ExpertMarc = ○Q ●E



Step 2: Edit Entry by Using Quick Form

Select the *Edit Marc* button (CatLess3-15, below) at the bottom of the screen and it will take you to the screen titled **Changing a Brief Union MARC Record** (CatLess3-6), which provides the quick form on which changes can be made.



Changing a Brief Union Marc Record

Brief Marc Form Fixed Data

Title Display: Indicator 2: Lc:

AUTHOR: >> Hold Isbn:

Place of Pub Publisher: Edition

Publish Date: Phys Desc:

Note Hold Note

Subject 1 S1 Hold 1

Subject 2 S2 Hold 2

Name Nm Hold Name

Series Se Hold Series

Bar Code Adult Donation

Class Price Cost: Acquired

Location Call 1 Call 2 Call 3

Status Astamp:

NOTE: For guidance in making changes using the form shown above, consult the "QuickMarc List of Commonly Used Variable Field Tags" that follows.

QuickMarc List of Commonly Used Variable Field Tags

The list below describes commonly used tags and subfields and indicates what they mean within the system. Use this list as a guide to the tags and subfields that can be used in a MARC record.

Tag 020, Subfield a (Quickmarc “Isbn”): Used to describe the ISBN number of the material. Can be searched via the *Isbn* button. Hyphens and spaces are not necessary when inputting this number.

Tag 100, Subfield a (Quickmarc “Author”): Used to describe the main author of the material and can be searched via the *Author* and *Keyword* buttons in OPAC.

Tag 245, Subfield a (Quickmarc “Title”): Used to describe the main title of the material. Can be searched via the *Title* and *Keyword* buttons in OPAC.

NOTE: Tag 245 – Title statement, Subfield a Title, is nearly always used to describe the main title of an item, but Subfield c Statement of responsibility, is not used often.

NOTE: Subfield a is understood by most MARC systems. This is why it is not often provided unless it is repeatable within a given field.

Tag 260, Subfield a (Quickmarc “Publisher”): Used to describe the name of the publisher.

Tag 260, Subfield b Quickmarc “Place of Pub”): Used to describe the place of the publication.

Tag 260, Subfield c (Quickmarc “Year”): Used to describe the publication date in the form of a four-digit year, such as 1999.

Tag 300, Subfield a (Quickmarc “Physical Description”): Used to describe the physical attributes of the material, such as number of pages.

Tag 490, Subfield a (Quickmarc “Series”): Used to describe a series in which the material belongs. Can be searched via the *Serial* and *Keyword* buttons in OPAC.

Tag 500, Subfield a (Quickmarc “General Note”): Used to describe, in summary, what the material is about. Can be searched via the *Keyword* button in OPAC.

Tag 650, Subfield a (Quickmarc “Subject”): Used to describe a main subject-added entry of the material. Can be searched via the *Subject* and *Keyword* buttons in OPAC.

Tag 700, Subfield a: Used to describe an additional person's name associated with the work, such as an illustrator or joint author. Can be searched via the **Author** and the **Keyword** buttons in OPAC. When the tags are highlighted green in the catalog editor program, they have been fully qualified in the Authority Control system. This makes them searchable in the OPAC via the "Author", "Subject", or "Series" fields, and their corresponding lists.

NOTE REGARDING AUTHORITY CONTROL: See Lesson 4: Authority Maintenance for an explanation about how "Authority" lists are employed in this program.

Tag 852 (Location): Contains the information necessary for locating an item which may be placed in a bibliographic record to show "copy specific" information. A bibliographic record has one 852 tag per each copy of the item owned by the library. Subfields are:

- a Location
- b Sublocation/Collection
- k Call number prefix
- h Classification part or entire call number
- i Item part of call number
- m Call number suffix
- t Copy number
- p Barcode number
- 9 Purchase price

Step 3: Update the Record

Once all changes have been made, click on the OK button on the lower right hand side of the screen so that the system will update the record.

NOTE: When simply view a record, do not select **OK** to update the record, select **Cancel** instead to ensure that the record is not changed in any way and to avoid having to re-index or re-enter the record.

Expert Marc

The “Marc Edit” or **ExpertMarc** screen (CatLess3-5) is used to edit records that require more detail and description than those entered using QuickMarc. The screen below (CatLess3-7) shows the same record discussed previously for the book, *How to Speak French*, in the list-based, ExpertMarc record editor.

Tag	1	2	Description
001			LBM20063
005			20000524163238.0
008			QNAM
100			aGarneau, Hector LL.B.
245			aHow To Speak French
260			aRenouf Publishing Companyc1946
300			aPaperback
350			aFrench language
949			i38751000180251aADULTd448eGarneof1hDON

A brief description of each button, box, and entry on the **Marc Edit** screen follows.

Auto Stamp (“Astamp”): General description of item, such as a cassette book, a picture, or a CD-Rom.

Other examples include:

- CB = Cassette book
- CD = Compact disk
- DVD = Digital video disk
- DVS = Described video
- GEN = Genealogy
- LP = Large print
- LVD = Laser video disk
- PAM = Pamphlet
- REF = Reference

Status: Status of item – whether it is on order, shelved, etc. Other examples include:

A = Additional copy on order
TEMP = Temporary I.L.L. Record
N = New and On Order
OP = Out of Print and Not Available
S = Copy in Storage

Tag: Column for tag numbers associated with item.

1: Indicator 1 – Indicators are different, depending on the corresponding tag, such as:

Tag 245
Indicator 1 Title

2: Indicator 2 -- Indicators are different, depending on the corresponding tag, such as:

Tag 245
Indicator 2 Nonfiling characters

Marc Record Description: Column containing the data that corresponds with the Tags and Indicators (if any) in the preceding columns.

Insert Tag: Inserts a new tag.

Change Tag: Changes field information within an existing tag number.

Delete Tag: Deletes a tag.

Change Text On (or off): Associated with “authority” list maintenance and the *Check Authority* button -- if this option is checked when an authority subject or name is selected from the Authority list, the Authority text will update automatically within the MARC tag by including the newly changed text.

NOTE: Be cautious when changing text. Follow the authority guidelines established by your library and avoid “cluttering” the system with unnecessary changes.

Check Authority: Checks all “Authority”-controlled tags in the record against the “Authority” list. If not found, the tag displays red. If found, it displays green.

Auto Add On (or off): Associated with “Authority” list maintenance – if this option is checked, all “Authority” tags will be added automatically to the “Authority” list, if they are not found first.

NOTE: Be careful when the *Auto Add* option is “on” because the program does not prompt you to first review and correct any new “Authority” entry. As such, a carelessly or a ridiculously similar or redundant entry (such as Second World War and World War II) could be allowed into the system.

Inline On (or off): Associated with the *Change tag* button -- enables or disables inline editing (changing data within each line in the list).

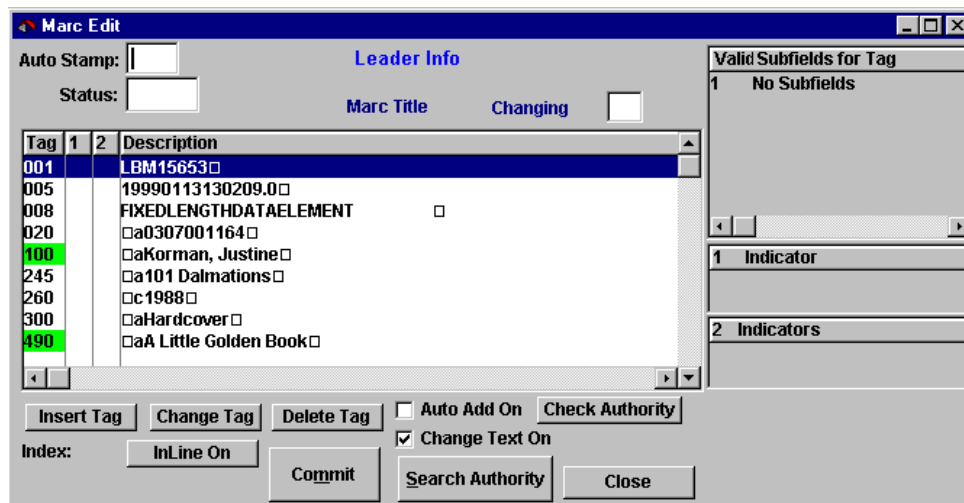
Commit: Commits a newly added record or a changed record to the database and to “active” status, making it searchable by users.

Search Authority: Searches and opens “Authority” list for highlighted tag.

Close: Close the screen.

Tags, Subfields, and the “Expert Edit” Functions

For an idea of how tags and subfields appear in the MARC database, following is an example of an actual MARC record for the book *101 Dalmations* that has been retrieved into the **Marc Edit** screen (see CatLess3-8, below) using the Catalog Editor software program.



A Closer Look -- Sample MARC Record for *101 Dalmations*

Variable Control Field	Tag	Description
Control Number	001	LBM 15653
Date and Time of Latest Transaction	005	19990113130209.0
Fixed-Length Data Elements Field	008	FIXEDLENGTHDATAELEMENT
International Standard Book Number or ISBN	020	□a0307001164
Main Entry – Personal Name (Author)	100	□aKorman, Justine
Title Statement	245	□a101 Dalmations
Publication, Distribution, etc. (Imprint)	260	□c1988
Physical Description	300	□aHardcover
Series Statement	490	□aA Little Golden Book
Local Information	949i38751000149389	□aJ□bJ□eKorma□f1□

Steps for Editing a Marc Entry in "Expert" Mode

NOTE: Once a record has been changed using the "Expert" editor, the "Quick" Marc list entry screen can never be accessed or used again on that particular entry. The "Expert" editor option elevates an entry made through the "Quick" Marc method to a new editorial level within the database.

Step 1: Select the *Edit Marc Bibliography* icon again (CatLess3-9, below).



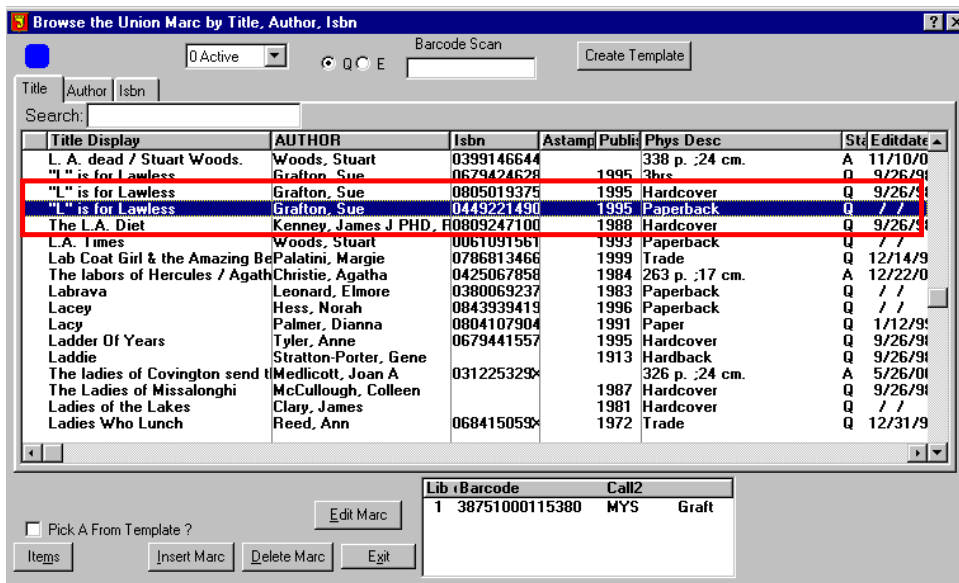
At the top of the **Lib/Net** screen, select the button shown above to access the **Browse the Union Marc by Title, Author, or Isbn** screen (CatLess3-10, below).

Title Display	AUTHOR	Isbn	Astamp	Public	Phys Desc	Sta Editdate
An ABC For You And Me	Tempest, Margaret	85503 022 4		1948	paper	Q 1/13/0
The Appalachian Trail	Fisher, Ronald	087044106		1972	Hardcover	Q 10/14/9
An Inquiry Into the Nature and	Smith, Adam			1952	Hardcover	Q 10/07/9
An Introduction to Picture Fram	Frank, Vivien	1573353000		1995	Hardcover	Q 5/27/9
East of Eden and the Wayward	Steinbeck, John			1952	Hardback	Q 6/13/0
The Three Billy Goats Gruff	Asbjornsen, P.C.	0156901501		1985	Trade	Q 10/18/9
Call to Arms	Griffin, W.E.B	0515093491		1987	Paperback	Q / /
A Town Like Alice		1564427749		1997	301 Minutes	Q 7/15/9
Wood and Coal	Sauvain, Philip	0808611569		1987	Paperback	Q 3/18/9
The 1	Mann, Carol	0681414553		1992	Hardcover	Q 9/26/9
1 2 3	Snapshot	1564585344		1994	Boardbook	Q 3/01/0
10 Lb. Penalty	Francis, Dick	0399143475		1997	3hrs	Q 9/26/9
10 Lb. Penalty	Francis, Dick	0399143025		1997	Hardback	Q 9/26/9
10 Minute Guide to Motivating	Cook, Marshall	002861738		1997	Trade	Q 6/07/9
The 100 Best Small Art Towns	Villani, John	1-56261-275		1996	trade	Q 9/26/9
100 Years in Leelanau	Littell, Edmund			1965	Trade	Q 10/14/9
100 Years in Leelanau	Littell, Edmund				Trade	Q / /

Below the table, there are buttons for 'Pick A From Template?', 'Edit Marc', 'Items', 'Insert Marc', 'Delete Marc', and 'Exit'. A small table with columns 'Lib Barcode' and 'Call2' is also visible.

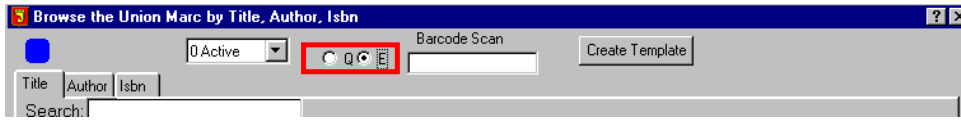
Step 2: Highlight the record (CatLess3-11).

Highlight a record that was entered using the form method. On the screen shown below, the book "*L is for Lawless*" by Sue Grafton has been highlighted.



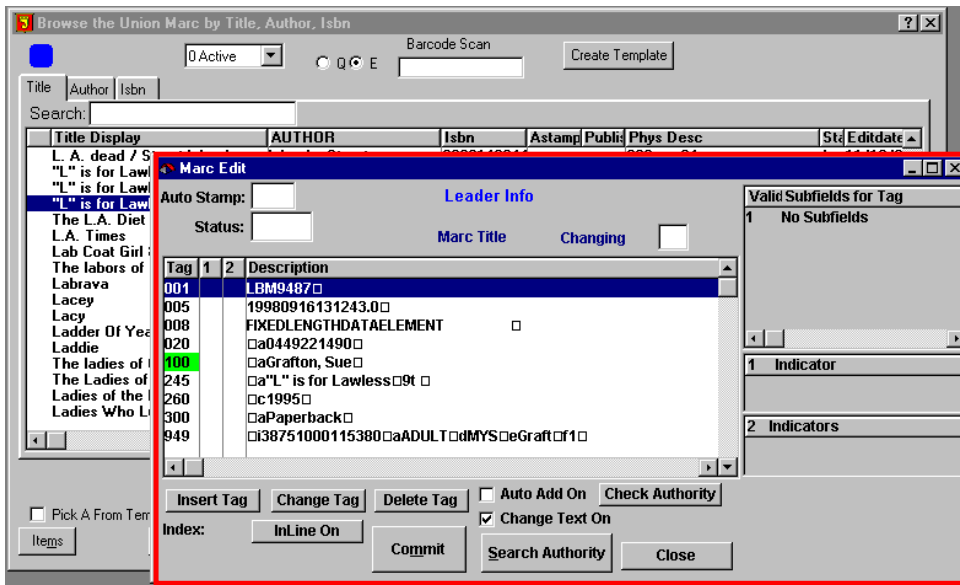
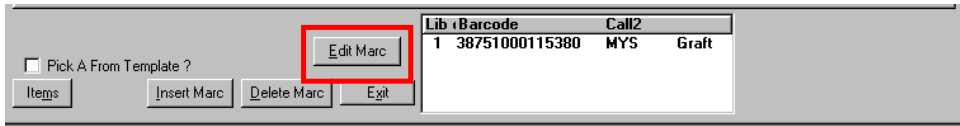
Step 3: Change the “Expert” editor option.

At the top of the screen, change the “editor” option from *Q* (for “Quick” edit) to *E* (for “Expert”edit) by selecting the radio button next to *E* (CatLess3-12).



Step 4: Select the *Edit Marc* button.

At the bottom of the screen, select the *Edit Marc* button (CatLess3-13, below). This will cause the MARC record to be displayed on the **Marc Edit** screen (CatLess3-14, below).

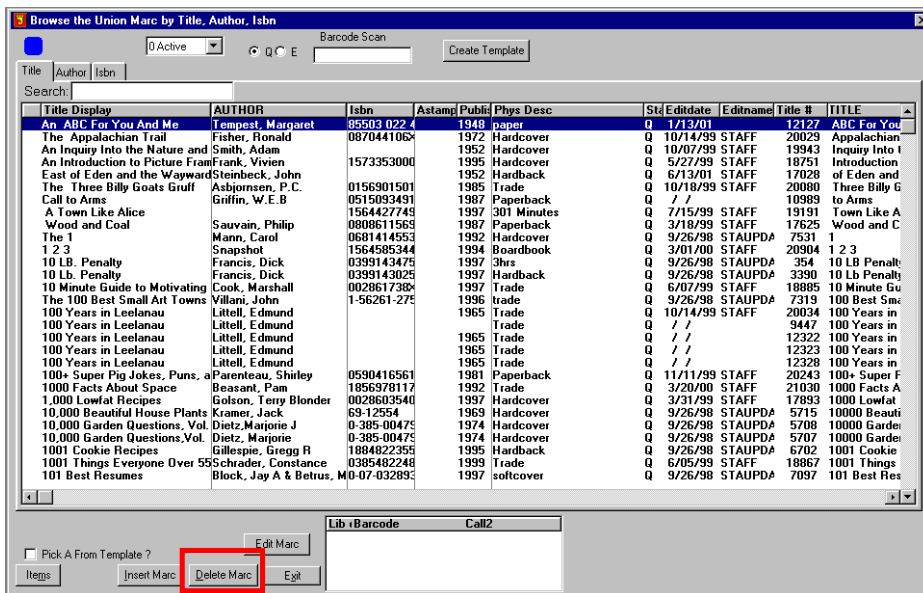


Step 5: Include information using the tags and subfields.

The list MARC, or “expert”, editor is a little more complicated to use than the form-based, or “quick”, editor, and tags and subfields must be used.

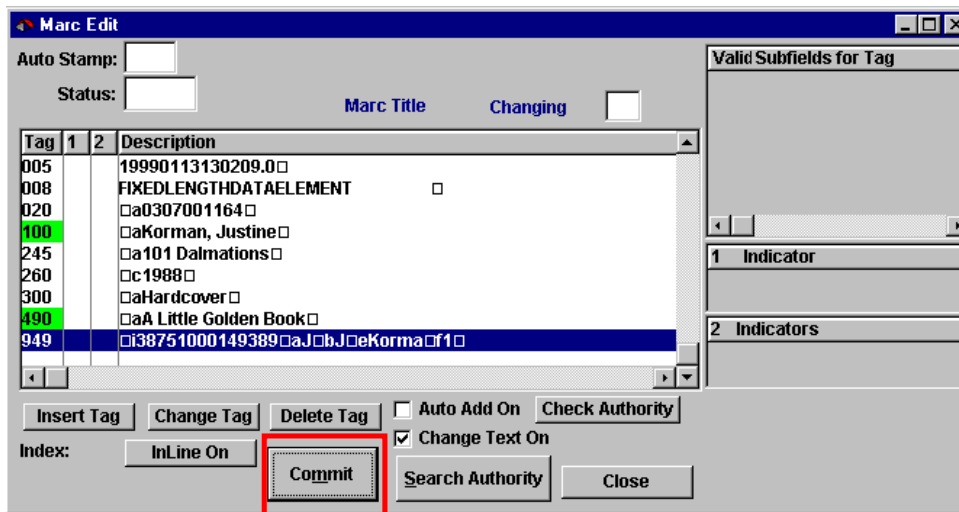
NOTE: Additions -- The most frequent entries made in the “Expert” editor concern tags, indicators, and data.

NOTE: Deletions -- Make deletions by selecting the *Delete Marc* button at the bottom of the **Browse the Union Marc by Title, Author, Isbn** screen (see CatLes3-10, below).

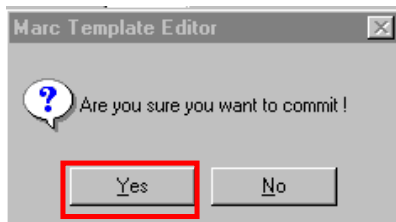


Step 6: Commit changes.

Send all changes to the database record by selecting the **Commit** button (CatLess3-15, below) at the center bottom of the screen. All previously red-highlighted tags will now become green.



A window verifying whether the user wants to commit the changed record to the database will appear (CatLess3-16, below). At this prompt, select **Yes** to commit the record or **No** to continue making changes.



Editing MARC Records Using Templates

The Catalog Editor software provides a template function that allows a user to create and use templates for new information to save time. Once one MARC record has been catalogued, that record can be highlighted and “saved” into a template format. This is useful when, for instance, a particular author has many books to be entered into the system. The premise behind a template is that certain elements of one record might not change from new record to new record, if common elements such as the author, publisher, etc. are there.

How to Create a Template

To create a new template, at the **Browse the Union Marc by Title, Author, ISBN** screen, select the record upon which you wish to base the template (see CatLess3-17, below). In the case of the example below, the chosen record is *The Adventures of Huckleberry Fin*, by Mark Twain.

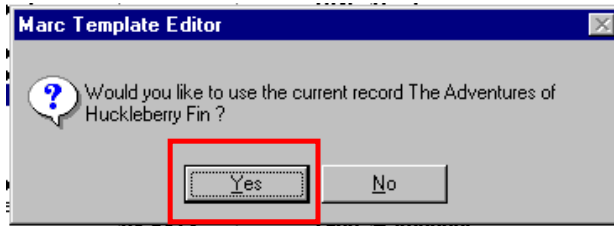
The screenshot shows the 'Browse the Union MARC by Title, Author, ISBN' window. The 'Create Template' button is highlighted with a red box. The table below shows the selected record highlighted with a red box.

Title Display	Author	Isbn	Astamp	Publi	Phys Desc	Sta	T	Editdate	Editname	Title #	TITLE
Adventures In Asia		0800137361	1994		40 min	Q	0	9/26/98	STAUPDA	266	Adventu
Adventures in Dinosaurland			1983		44 min	Q	0	9/26/98	STAUPDA	56	Adventu
Adventures of America 1857-18	Kouwenhoven, John		1938		Hardcover	Q	0	9/26/98	STAUPDA	9280	Adventu
Adventures of America 1857-18	Kouwenhoven, John A.		1938		Hardcover	Q	0	10/15/99	STAFF	20053	Adventu
The Adventures of Augie March	Bellow, Saul		1953		Hardcover	Q	0	/ /	/ /	5906	Adventu
The Adventures of Baron Munchausen	Nickel, Peter				Hardback	Q	0	2/18/99	STAFF	17157	Adventu
The Adventures of Bob White	Burgess, Thornton		1919		Hardcover	Q	0	2/08/99	STAFF	16758	Adventu
The Adventures of Bobby Coon	Burgess, Thornton		1946		Hardcover	Q	0	2/08/99	STAFF	16762	Adventu
The Adventures of Captain Uni	Pilkey, Dav		1997		Trade	Q	0	9/10/99	STAFF	19717	Adventu
The Adventures of Chatterbox	Burgess, Thornton		1943		Hardcover	Q	0	2/08/99	STAFF	16759	Adventu
The Adventures of Grandfather	Burgess, Thornton		1943		Hardcover	Q	0	2/08/99	STAFF	16763	Adventu
The Adventures of Huckleberry	Twain, Mark	094526030X	1989		Hardcover	Q	0	12/21/98	STAFF	14874	Adventu
The Adventures of Huckleberry	Twain, Mark		1912		Hardback	Q	0	2/11/99	STAFF	16920	Adventu
The Adventures of Huckleberry	Twain, Mark		1954		Paperback	Q	0	2/11/99	STAFF	17062	Adventu
The Adventures of Huckleberry	Twain, Mark		1940		Hardcover	Q	0	5/13/99	STAFF	18483	Adventu
The Adventures of Johnny Chu	Burgess, Thornton		1941		Hardcover	Q	0	2/08/99	STAFF	16757	Adventu
The Adventures of King Midas	Banks, Lynne Reid	0380715643	1976		Trade	Q	0	12/11/98	STAFF	14112	Adventu
The Adventures of Mark Twain	Allen, Jerry	54-6873	1955		Hardcover	Q	0	10/01/99	STAFF	19094	Adventu
The Adventures of Mr. Moxley	Burgess, Thornton		1942		Hardcover	Q	0	2/08/99	STAFF	16783	Adventu
The Adventures of Old Man Co	Burgess, Thornton		1944		Hardcover	Q	0	2/08/99	STAFF	16760	Adventu
The Adventures of Prickly Pork	Burgess, Thornton		1944		Hardcover	Q	0	2/08/99	STAFF	16782	Adventu
The Adventures of Reddy Fox	Burgess, Thornton		1941		Hardcover	Q	0	2/08/99	STAFF	16761	Adventu
The Adventures of Robin Hood	Mattern, Joanne	0061064203	1996		Trade	Q	0	/ /	/ /	10378	Adventu
The Adventures of Robinson C	Defoe, Daniel		1977		Trade	Q	0	11/27/01	STAFF	15462	Adventu
The Adventures of Sammy Jay	Burgess, Thornton		1943		Hardcover	Q	0	2/08/99	STAFF	16754	Adventu
The Adventures of Sherlock H	Doyle, Sir Arthur Conan		1988		Paperback	Q	0	7/22/99	STAFF	19236	Adventu
Adventures of Sherlock Holmes	Dolje, A. Conan				Hardcover	Q	0	1/28/99	STAFF	16385	Adventu
The Adventures of Sojourner	Wunsch, Susi Trautmann	0965049361	1998		Trade	Q	0	3/14/00	STAFF	20962	Adventu
Adventures of Spider-Man	Man		1995		Trade	Q	0	3/02/99	STAFF	17398	Adventu
The Adventures of Strawberry	Wallner, Alexandra	0394852885	1980		Trade	Q	0	9/26/98	STAUPDA	9167	Adventu

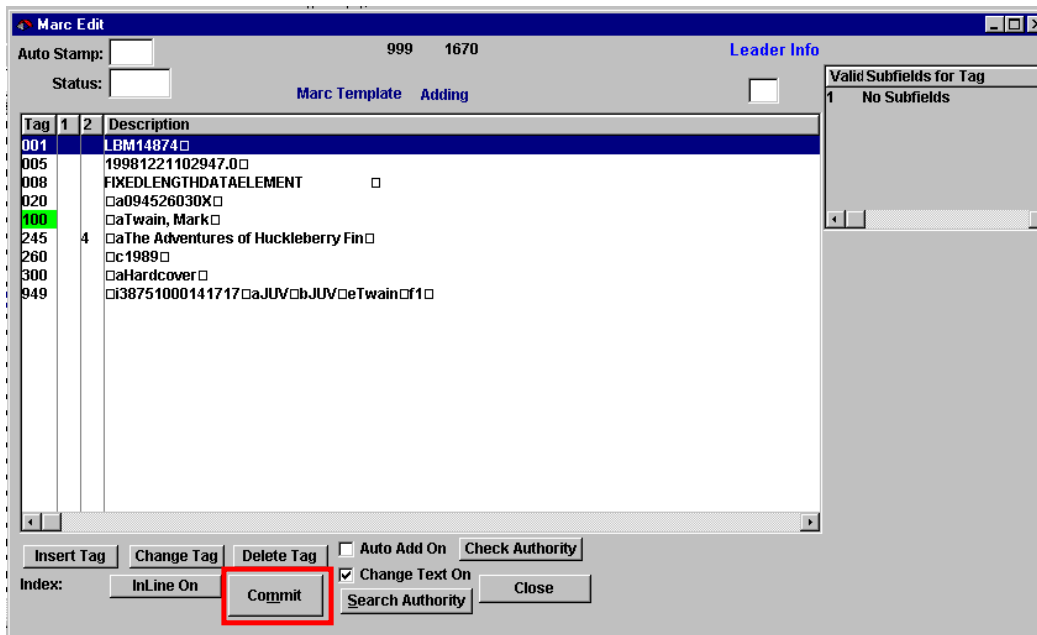
At the bottom of the window, the 'Lib + Barcode Call2' field shows '1 38751000141717JUW Twain'. The 'Create Template' button is highlighted with a red box.

Next, select the *Create Template* button (see CatLess3-17 again, above).

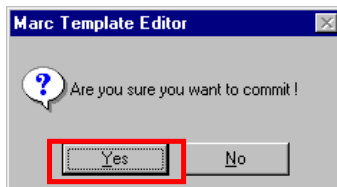
A screen titled **Marc Template Editor** will appear (CatLess4-18a, below). Select **Yes** at this screen.



Once **Yes** has been selected, the **Marc Edit** ("Expert" editor) screen will appear (CatLess4-19, below).



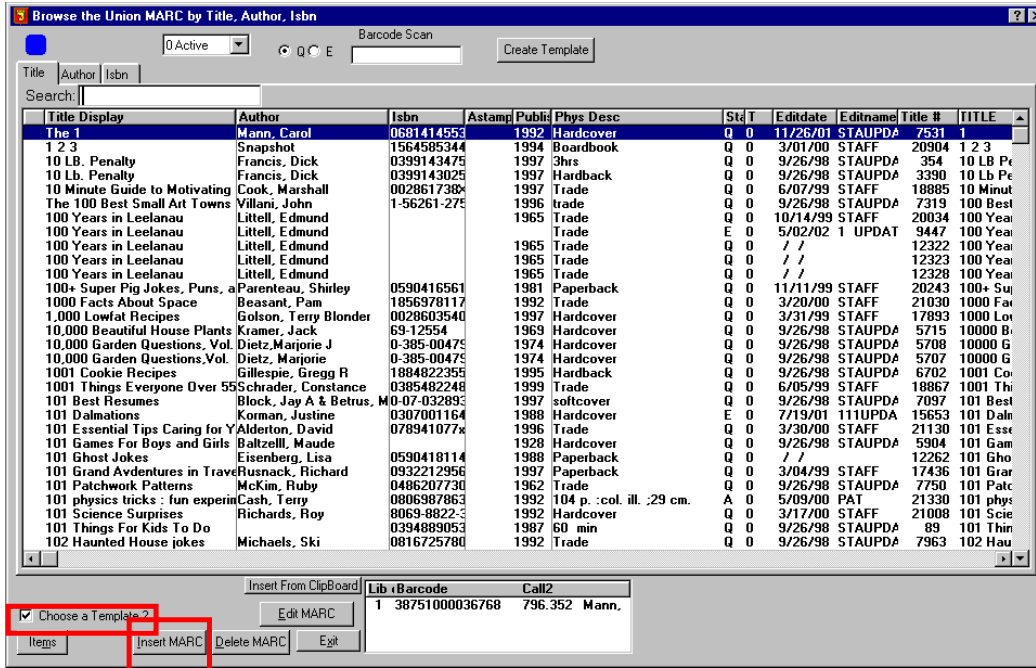
At this screen, a user can make changes to the template, then **Commit** those changes (see CatLess3-26b, above and CatLess3-20, below).



At that point, after selecting **Yes**, a template will be saved in the system for future use.

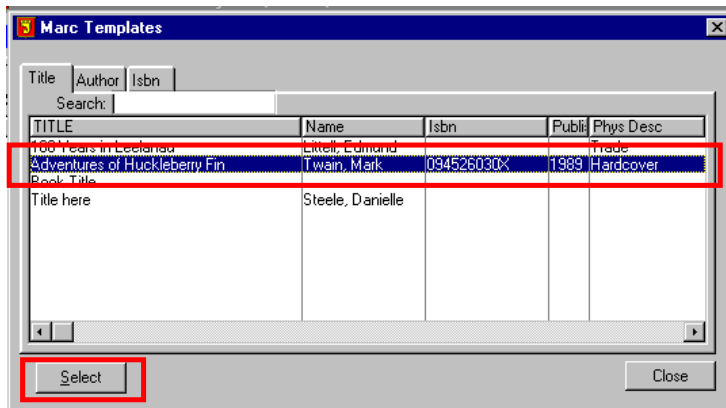
How to Use an Existing Template

To use an existing template for a new MARC record, at the bottom left of the **Browse the Union MARC by Title, Author, Isbn** screen, check the box next to *Choose a Template?* (see CatLess3-21, below) first.

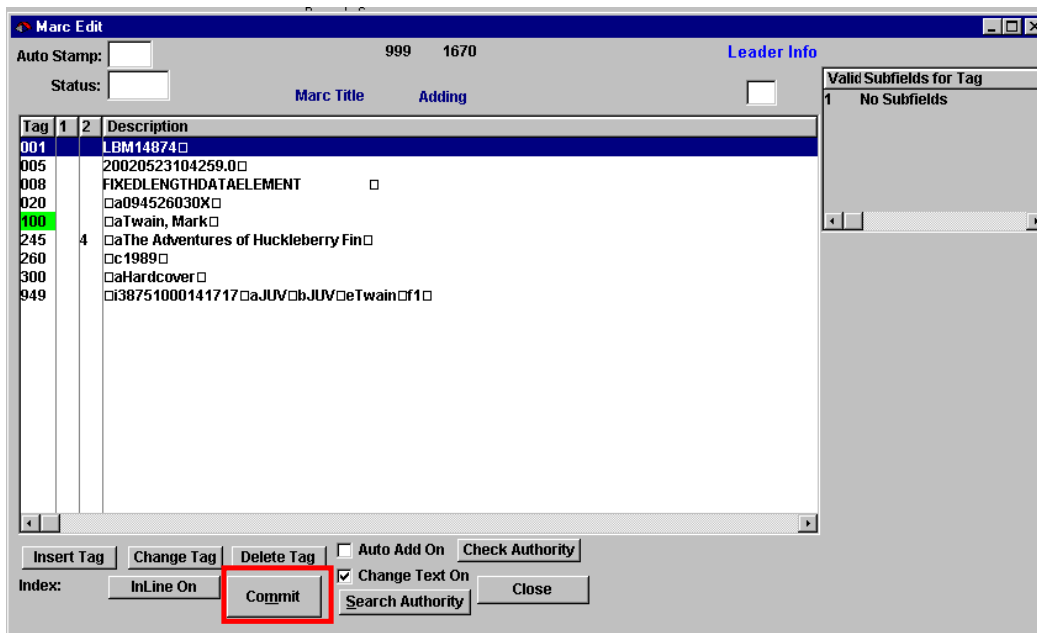


Next, select the *Insert MARC* button (see CatLess3-21, above).

A screen titled **Marc Templates** (see CatLess3-22, below) appears. This screen contains a list of previously created templates, including the template based on the *Adventures of Huckleberry Fin* MARC record described in the previous section.



At this screen, choose the template you wish to use, in this case, *Adventures of Huckleberry Fin*, then choose the **Select** button (see CatLess3-22, above) to bring up the *Adventures of Huckleberry Fin* template on the **Marc Edit** screen (see CatLess3-23, below). Make changes to the template, then **Commit** the resulting new record, accordingly.



Tags and Subfields

Detailed List of Some Commonly Used Variable Field Tags

NOTE: Information in this section is based on information from the Library of Congress publication, *Understanding MARC Bibliographic – Machine-Readable Cataloging, 1994* and the Michigan Library Consortium's publication, *MARC: An Introduction, 1997*.

Following is a list of commonly used variable field tags with their indicators and subfields. Refer to this list as a guide for making entries in the catalog.

010 LCCN (Library of Congress Control Number)

NR, or Not Repeatable

Indicators undefined

Subfield used most often:

a Library of Congress Control number

020 ISBN (International Standard Book Number)

R, or Repeatable

Indicators undefined

Subfields used most often:

a International Standard Book Number

c Terms of availability (often a price)

z Cancelled/invalid ISBN

040 Cataloging source (NR)

Indicators undefined

Subfields used most often:

a Original cataloging agency

c Transcribing agency

d Modifying agency

050 Library of Congress call number (national)

090 Library of Congress call number (local)

082 Dewey Decimal call number (national)

092 Dewey Decimal call number (local)

100 Personal name main entry (primary author)

(NR – there can be only one main entry)

Indicator 1: Type of personal name entry element

0 Forename

1 Single surname (most common form)

2 Multiple surname

3 Family name

Subfields most commonly used:

a Personal name

b Numeration

c Titles and other words associated with a name

q Fuller form of name

d Dates associated with a name (generally year of birth)

111 Conference or meeting name main entry (corporate author)**110** Corporate name main entry (corporate author)**111** Conference or meeting name main entry (conference or meeting as author)**130** Main entry – Uniform title

(NR)

Indicator 1: Nonfiling characters

0-9 Number of nonfiling characters present

(for initial articles, including spaces)

Subfields most commonly used:

a Uniform title

p Name of part/section of a work (R)

l Language of a work

s Version

f Date of a work

240 Uniform title

(NR)

Indicator 1: Uniform title printed on card

0 Not printed on card

1 Printed on card (most common)

Indicator 2: Nonfiling characters

0-9 Number of nonfiling characters present

(for initial articles, including spaces)

Subfields most commonly used:

a Uniform title

l Language of a work

f Date of a work

245 Title, other title information, and statement of responsibility (NR)

Indicator 1: Title added entry (Should the title be indexed as a title added entry?)

0 No title added entry

(indicates a title main entry; such as no author is given)

1 Title added entry

(the proper indicator when an author given in 1XX; the most common situation)

Indicator 2: Number of nonfiling characters

0-9 Number of nonfiling characters present, including spaces; usually set at zero, except when the title begins with an article such as for *The Firm*, for which the second indicator would be set to 4. The letters, "T", "h", "e", and the space following are then ignored when alphabetizing titles. The record automatically will be filed under "F" for *Firm*.

Subfields used most often:

a The title proper

h Medium (often used for a non-book media)

p Name of part/section of a work

b Remainder of title (subtitles, etc.)

c Remainder of title page transcription/statement of responsibility

250 Edition statement (NR)

Indicators undefined.

Subfields used most often:

a Edition statement

260 Publication information (place of publication, publisher, date of publication or copyright date, or both) (Imprint) (NR)

Indicators undefined. Indicator 1 became obsolete in 1990.

Older records may display 0 or 1.

Subfields used most often:

a Place of publication, distribution, etc. (R)

b Name of publisher, distributor, etc. (R)

c Date of publication, distribution, etc. (R)

300 Physical description (paging, illustrations, maps, etc. and dimension(s) of item (R)

Indicators undefined.

Subfields used most often:

a Extent (number of pages)

b Other physical details (usually illustration information)

c Dimensions (cm.)

e Accompanying material (such as "study guide" or "reference manual")

440 Series statement/added entry – Title (R)

Indicator 1 undefined

Indicator 2: Nonfiling characters

0-9 Number of nonfiling characters present (for initial articles, including spaces)

Subfields used most often:

a Title

v Volume number

490 Series statement (No added entry is traced from field) (R)

Indicator 1: Specifies whether series is traced (whether an 8XX tag is also present, tracing the series differently)

0 Series not traced

1 Series traced differently (8 XX is in record)

Indicator 2 undefined

Subfield used most often:

a Series statement

500 Note field (or “General note”) (R)

Indicators undefined.

Subfield used most often:

a General note (Used when no specialized note field has been defined for the information. Examples: Notes about the index; the source of the title; variations in title; descriptions of the nature, form, or scope of item)

504 Bibliography note (R)

Indicators undefined

Subfield used most often

a Bibliography note

505 Contents (R)

Indicator 1: Type of contents note

0: Complete contents

1: Incomplete contents (used with multi-volume set when some volumes are not yet published)

2: Partial contents

Indicator 2: Level of content designation

b Basic

0 Enhanced

Subfield used most often:

a Formatted contents note

520 Summary or abstract (R)

Indicator 1: Normally blank (no information provided)

Indicator 2: undefined

Subfield used most often:

a Summary, abstract, or annotation

590 Local note field**600** Personal name subject heading (work is about person named in 600 field) (R)

Indicator 1: Type of personal name entry element

0 Forename

1 Single surname (most common form)

2 Multiple surname

3 Family name

Indicator 2: Subject heading system/thesaurus (identifies specific list or file used)

0 Library of Congress Subject Headings /LC authority file

1 LC subject headings for children's literature

2 Medical subject headings/NLM authority files

3 National Agricultural Library subject authority file

4 Source not specified

5 Canadian Subject Headings/NLC authority file

6 Repertoire des vedettes-matiere/NLC authority file

7 Source specified in subfield 2

NOTE: The USMARC format does not provide an assigned indicator for Sears subject headings, so an indicator of 7 is used and the USMARC defined code "sears" is placed in subfield 2.

Subfields used most often:

a Personal name (surname and forename)

b Numeration

c Titles and other words associated with a name

q Fuller form of name

d Dates associated with a name (generally, year of birth)

t Title

x General subdivision (R)

y Chronological subdivision

z Geographic subdivision (R)

2 Source of heading or term (used with 2nd indicator of 7)

NOTE: Subfields x and z in the 600 field are repeatable. Subfields x, y, z, do not have to be in alphabetical order. They will be in the order prescribed by the instructions provided in the subject heading system.

610 Subject added entry – Corporate name (or conference or meeting name) subject heading (work is about conference or meeting named in 611 field)

Indicator 1: Type of corporate name entry element

0 Inverted name (note used with AACR2R)

1 Jurisdiction name

2 Name in direct order

Indicator 2: Subject heading system/thesaurus (See indicator 2 under 600)

Subfields used most often:

a Corporate name or jurisdiction name as entry element

b Subordinate unit (R)

x General subdivision

y Chronological subdivision

z Geographic subdivision (R)

2 Source of heading or term (used with 2nd indicator of 7)

650 Topical subject heading (work is about topic named in 650 field – most subject headings fit here) (R)

Indicator 1: Normally blank (no information provided)

Indicator 2: Subject heading system/thesaurus (identifies specific list or file used)

0 Library of Congress subject headings

1 LC subject headings for children's literature

2 Medical subject headings

3 National Agricultural Library subject authority file

4 Source not specified

5 Canadian subject headings

6 Repertoire des vedettes-matiere

7 Source specified in subfield 2 (The USMARC does not provide an assigned indicator for Sears subject headings, so an indicator of 7 is used and the USMARC defined code "sears" is placed in subfield 2).

Subfields used most often:

a Topical term

x General subdivision (R)

y Chronological subdivision

z Geographic subdivision

2 Source of heading or term (used with 2nd indicator of 7)

NOTE: Subfields x and z in the 650 field are repeatable. Subfields x, y, and z do not have to be in alphabetical order. They will be in the order prescribed by the instructions provided in the subject heading system.

651 Geographic subject heading (or "subject added entry" -- work is about geographic area named in 651 field) (R)

Indicator 1: Undefined

Indicator 2: Subject heading system/thesaurus (See indicator 2 under 600.)

Subfields used most often:

a Geographic name

x General subdivision (R)

y Chronological subdivision (R)

2 Source of heading or term (used with 2nd indicator of 7)

NOTE: Subfields x and z in the 651 field are repeatable. Subfields x, y, and z do not have to be in alphabetical order. They will be in the order prescribed by the instructions provided by the subject heading system.

700 Personal name added entry (another person responsible for intellectual content of work such as a co-author, editor, compiler, etc. named in addition to person or entity named in 1XX field above) (R)

Indicator 1: Type of personal name entry element

0 Forename

1 Single surname (most common form)

2 Multiple surname

3 Family name

Indicator 2: Type of added entry

b No information provided (most common; co-authors, editor, etc.)

2 Analytical entry

NOTE: The values for Indicator 2 changed in 1994 with Format Integration, so older records show different values. An analytical entry involves an author/title of an item contained in a work.

Subfields used most often: a Personal name

b Numeration

c Titles and other words associated with a name

q Fuller form of name

d Dates associated with a name (generally, year of birth)

e Relator term (such as ill.)

4 Relator code

710 Corporate name added entry (corporate body responsible for intellectual content of work such as a co-author, named in addition to person or entity named in the 1XX field above) (R)

- Indicator 1: Type of corporate name entry element
 - 0 Inverted name (not used with AACR2R)
 - 1 Jurisdiction name
 - 2 Name in direct order
- Indicator 2: Type of added entry (see Indicator 2 under 700)
 - 0 Alternative entry (most common)
 - 1 Secondary entry
 - 2 Analytical entry
- Subfields used most often:
 - a Corporate name or jurisdiction name as entry element
 - b Subordinate unit

711 Conference or meeting added entry (conference or meeting responsible for intellectual content of a work, named in addition to the person or entity named in 1XX field above)

740 Added entry – Uncontrolled related/analytical title (R)

- Indicator 1: Nonfiling characters
 - 0-9 Number of nonfiling characters present (for initial articles, including spaces)
- Indicator 2: Type of added entry (see Indicator 2 under 700)
 - b No information provided
 - 0 Alternative entry
 - 2 Analytical entry

NOTE: This field was redefined in 1994 with Format Integration. Prior to 1994, the field was also used for variant titles such as different wording on a spine title. In records created since Format Integration, those variant titles appear in a 246 field.

- Subfield used most often:
 - a Title

800 Series added entry – Personal name (R)

- Indicator 1: Type of personal name entry element
 - 0 Forename
 - 1 Single surname
 - 2 Multiple surname
 - 3 Family name
- Indicator 2 undefined.
- Subfields used most often:
 - a Personal name
 - b Numeration
 - c Titles and other words associated with a name
 - q Fuller form of name
 - d Dates associated with a name (generally, year of birth)
 - t Title of a work (the series)

830 Series added entry – Uniform title (R)

Indicator 1 Undefined

Indicator 2: Nonfiling characters

0-9 Number of nonfiling characters present (for initial articles, including spaces)

Subfield used most often:

a Uniform title

v Volume number

FINAL NOTES

NOTE 1 – Fixed and variable fields not all necessary: The variable fields are not all necessarily used in every record and neither are all of the elements of the fixed field.

NOTE 2 – Tags and subfields are unlimited and can be local: The options for entering tags and subfields in this mode are virtually limitless. For example, several more 700 tags describing additional names of people associated with the record can be added, or a 740 tag, which allows an added-entry variant title, can be included to allow a Marc entry to be searched by a completely different title. 900 numbers are "local" numbers. They can be added for specific local notations, or deleted from imported records that do not pertain to a particular library's local information.

NOTE 3 – Green and red highlights (see CatLess3-24, below): Tags highlighted in red indicates that they are searchable tags in the OPAC, but not yet in your local system. Green highlighted tags indicate that they have been added to the list and are now searchable in your local system. Red becomes green once the changes are committed to the system using the *Commit* button at the Marc Edit screen.

Tag	1	2	Description
001			LBM7097
005			19990217131447.0
008			FIXEDLENGTHDATAELEMENT
020			a0-07-032893-5
100			aBlock, Jay A.9n 500000638
245			a101 Best Resumes
260			c1997
300			asoftcover
950			aResume guides
949			38751000032619aADULTd650.14eBlockf1

Lesson 4: How to Import a MARC Record from a USMARC Import File

Introduction

Definition of "Import"

According to the *New Webster's Dictionary*, the word "import" means:

- verb -- to "bring in, especially goods from a foreign country"
- noun -- a "thing imported"

This lesson describes the process of "bringing in" or importing records to a MARC database from a "foreign" source such as another library's catalog.

Why Import?

The number one reason to import a MARC record rather than create one is to save time. Another reason is that for importing purposes, book publishers often include a disk with MARC records for the books that have been purchased. If a librarian is faced with entering many MARC records into the system at one time, the "import" function of the Catalog Editor can be used to bring records already in the standard MARC format to the current holdings. Of course, local changes and any other necessary changes must be made, but importing records is advantageous because if they are derived from a reliable source such as the Library of Congress, they can be more accurate and, therefore, save precious time.

How Does Importing Work?

Select the Import Source

MARC records can be imported from various sources, such as a floppy disk or a MARC-compatible library catalog. Book publishers or cataloging jobbers often include MARC records on floppy disks. MARC records can also be imported (or transferred) from another MARC-compatible library catalog available on line such as the one from the Library of Congress. To import files from another catalog available on line, a user first selects files from a database through the use of a Z39.50 client (*BookWhere*, for instance) that can search the MARC records of many Web-based catalogs.

Basic Computer File Management Skills Are Essential

One of the essential steps in the import process is to save imported records into a directory that will later be accessed by users, then added to the database. As such, file management skills also are necessary. Following is key information that will help users navigate among their computer files when importing MARC records.

Track Imported Files

Whether using a floppy disk or another library catalog, the search-and-import process is simple, but a user must make notes and establish a path of imported computer files so that he or she can locate all imported files after copying them from the MARC record source. This "trail of crumbs," or path that leads to the copied file or files, is simply a list of import files and their locations.

Before importing a MARC file, it is absolutely necessary for a user to have some basic knowledge about how to create, delete, save, and maintain computer files and directories so that that trail of crumbs leading to an import file can be properly established.

NOTE ABOUT IMPORTING FROM A DISKETTE VERSUS ON-LINE LIBRARY RECORDS: When importing MARC records directly from a diskette please skip this section and go on to page 7. The ensuing section is only relevant to creating a directory on the C:\ Drive to hold records imported from an on-line library database. When importing from a diskette, there is no need to create an import-holding directory (as instructed below) on the C:\ Drive because all records will be processed directly from the diskette in the A:\ Drive.

BEFORE Using the Import Function for On-line Library Records (not a diskette) . . .

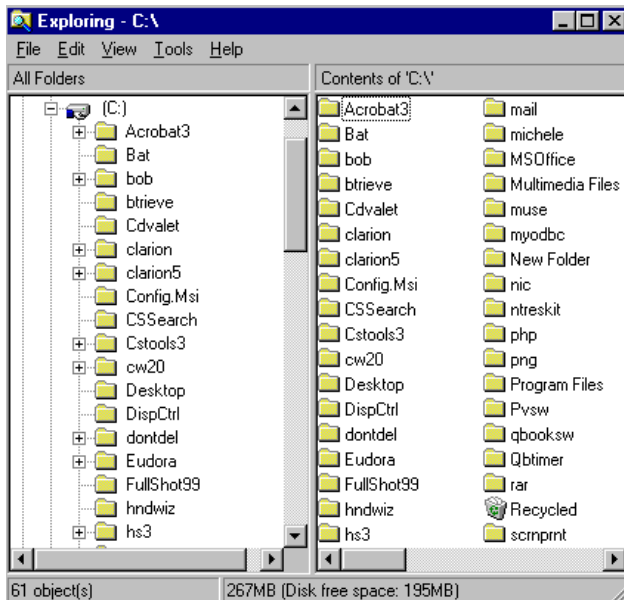
Before using the import function, it is necessary for a user to:

- 1. create a directory*
- 2. save the import file(s) to that directory*

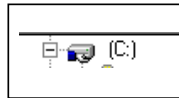
Create a Directory

It is wise to create a computer directory (or folder) to hold imported records "in transit," that is, existing MARC records that have been selected through the use of a program such as *BookWhere*. Once these records have been selected, they need to be "saved" somewhere on your computer so that later, they can be transferred into the Catalog Editor program, and processed into your library's existing MARC catalog. If you create a directory specifically devoted to holding such saved files, then you will always know where to find them. Following are the steps for creating a directory.

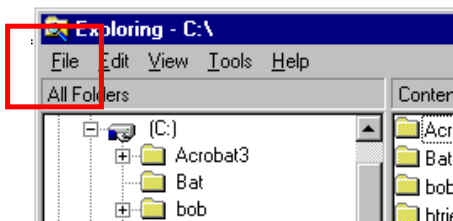
1. Open up a file manager program such as *Windows Explorer* (CatLess4-1, below).



2. Select a computer drive such as Drive "C" for your hard drive, or Drive "A" if you would rather save files on individual floppy disks. This is the destination drive that will hold the directory where imported files are to be stored (CatLess4-2).

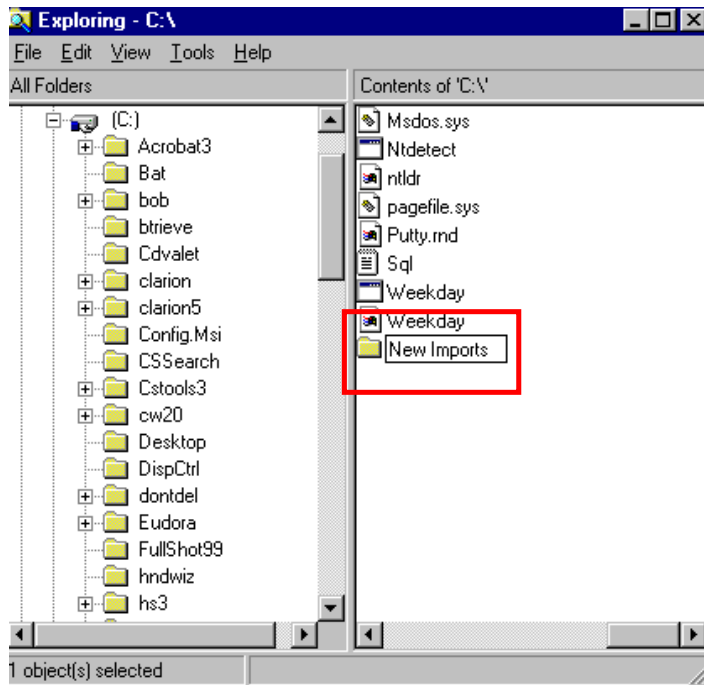


3. Click twice on the drive to open it up. Opening it will make the drive ready to receive a new directory.
4. At the top left corner of the screen, select "File" (CatLess4-3).



5. Once the pull-down menu appears, select "New".

6. Select "Folder".
7. A new folder titled "New Folder" will appear as the last folder in the list of folders on the right side of the screen.
8. The cursor will automatically appear in the title bar below the new folder. Erase the title "New Folder" from this box by placing your cursor on the text and backspacing or deleting over it, and type a memorable directory name that relates to the task of importing files such as "New Imports" or "Today's Imports," or just "Imports" (CatLess4-4). This folder will now be used to hold documents that have been taken from an importing source and that are ready to go into your library's MARC records via the Catalog Editor program, using the "import" function.



Save Files to Be Imported

When importing Marc records from a source, it is necessary to identify, then “save” a file containing those records before continuing on to the importing process. For instance, a user will first go to a program such as *BookWhere*, select one or several records to import at one time or during a single “import” session, then “save” these records in a particular document with a “filename”, in a particular directory.

The process for saving these files follows.

1. Select the record or records to be imported.

NOTE: HINTS for selecting multiple records in Windows-based computer programs:

To select more than one record at a time when these records are not located right above or below one another, hold down the <Ctrl> key (located on the very left, bottom corner of the keyboard) and use the mouse to click on and select each record. This function will “tag” the import items so that they can be imported collectively at the end of one session, rather than many sessions. This saves the time and trouble of holding an import session for each single record you wish to import.

When items are located directly above or below one another, use the <Shift> key to select the “range” or continual list of items to be imported.

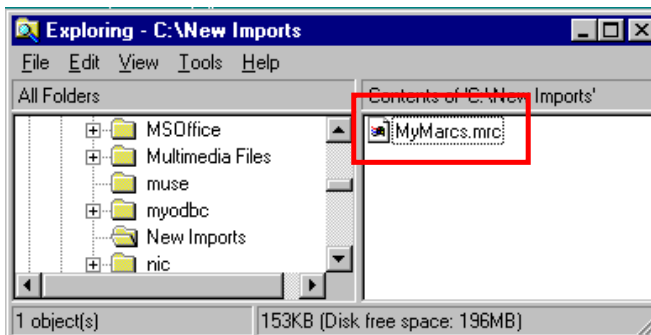
2. Select the “File” menu at the top left of the Windows screen.
3. Select “Save As . . .” from that menu.
4. Choose a directory to which to save the new document that will hold the MARC record or records selected. Do this by clicking on the folder icon with the arrow until the directory folder into which you wish to save the records appears in the box below the folder icon (CatLess4-5).



5. Using the mouse, be sure to “select” or “highlight” this folder to make it ready (place it on standby) to receive the document of imported records. Write down the name of this folder/directory path so that you can remember it later.

Example: <DIR> name: “C:/New Imports”

6. Type a new document name into the box below the box of folders labeled "File name." For instance, "MyMarcs.mrc" (CatLess4-6).



NOTE about document name extensions: The document or file must be a valid USMARC file in order to work with the Catalog Editor software, thus it must be from BookWhere or the Library of Congress. Beware - the extensions "doc" or "txt" indicate invalid files because they are probably not USMARC files. A recommended extension to use is ".mrc".

Be sure to write down the name of the document so that you can locate it within the directory into which it is saved. In this case, the name of the document is: "C:\New Imports\MyMarcs.mrc".

This information becomes important when the user returns to the Catalog Editor software to "pull in" the imported records to the library's own database, using the *Import File* function.

With the above information in mind, you are now ready to learn how to continue the importation process featured in the Catalog Editor program.

Steps for Importing MARC Records from a Floppy Diskette or an On-Line Library Catalog

A short list of steps for importing a MARC record follow. Later in this chapter, these steps are outlined in detail.

NOTE - If importing from a diskette, skip Steps 1 and 2: When importing records from an on-line MARC-compatible library catalog, it is necessary to choose and save records first, before importing them. When importing records directly from a disk, it is not necessary to follow these steps, and you may begin the process with Step 3.

1. Choose the records from a diskette or MARC-compatible library catalog on line.
 2. Save the records.
-
3. Import the records.
 4. Handle the records.
 5. Choose the file or directory to import.
 6. Process the file or directory.
 7. Search for duplicate titles.

NOTE: Avoid entering duplicate records into the system at all costs. It is possible to copy the same imported record into the CatEdit review area more than once, and the system does not check for duplicates. If, later on, it is evident that duplicate records exist in the review area, they can be deleted at that time, using that screen. Be sure to read this lesson thoroughly to learn how to avoid making duplications.

REMEMBER . . . Steps 1 and 2 pertain ONLY to records imported from a library catalog on line.

Step 1: Choose the Records

Select one or more records to export from an on-line source.

Step 2: Save the Records (To be completed only if importing records from an on-line source)

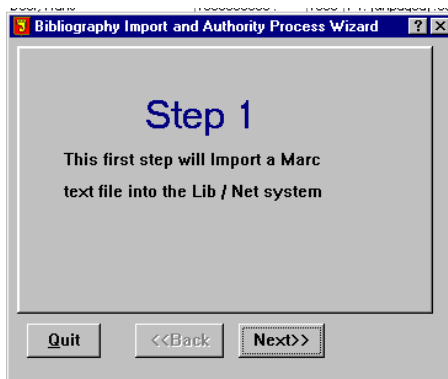
Save on-line, MARC-compatible library records into your special importing directory.

NOTE: Remember to write down where you put the imported file in the computer so that you can find it later. This is called locating the "path". Light file management skills are required to do this. For discussion about general file management, refer to the information in the section titled, "Before Using the Import Function. . ." found at the beginning of this chapter.

NOTE: If importing records from a diskette, begin the process here . . .

Step 3: Import the Records (Skip Step 2 if importing from a disk and complete this step instead)

Click the mouse on the wizard's cap icon (shown below – CatLess4-7), a screen will appear that says "Step 1 This first step will import a Marc text file into the Lib/Net system" (also shown below – CatLess4-8).



Step 4: Handle the Records

At the **Step 1** screen, select **Next>>** to get to the **Marc Record Import Handling** screen (CatLess4-9):

Name	Date	Time	Size	Attrib

IMPORTANT NOTE: Before an importing session, if you truly want to start fresh and not have any **old**, newly-imported records (left over from a previous import session), mixed in with **NEW** newly-imported records, then you must make sure that the *Empty Review File* box on the **Marc Record Import Handling** screen has been checked first. The default setting is for this box **NOT** to be checked, so it is up to you, the user, to click in the box and check it before importing any new records. Why? Because when the *Empty Review File* box **IS** checked (CatLess4-10, below) on the **Marc Record Import Handling** screen, the system automatically clears out previously reviewed records as the new ones are imported.

Step 5: Choose the File or Directory to Import

Select either the *Choose a Single Marc File* button (CatLess4-9, below) or the *Import a Whole Disk or Directory* button (CatLess4-11, below), depending on whether you intend to import a single file or an entire disk or directory of files.

Marc Record Import Handling 5:26:15pm [S] [W] [R] [B] [C]

Marc Record Type Empty Review File? Authority Bibliography

Import File

E:\KRIS\IMPORT*. *

Name	Date	Time	Size	Attrib

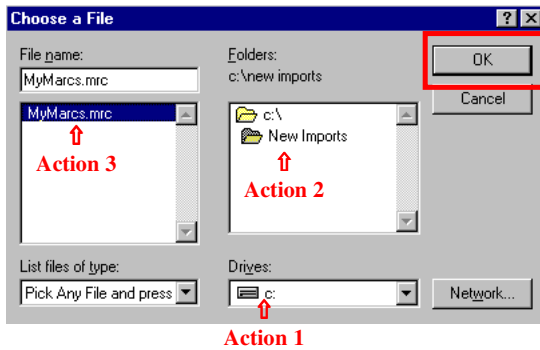
Before you can process the file or directory, a screen with the heading, **Choose a file** (see CatLess4-12 below), will appear, featuring a list from which a file or directory can be selected for importing. This screen is similar to any windows *File, Open*, screen.

Now is the time that you need to remember the path to the directory where you saved the files exported from *BookWhere*, the Library of Congress, etc., or you will select Drive A if it is the importing source.

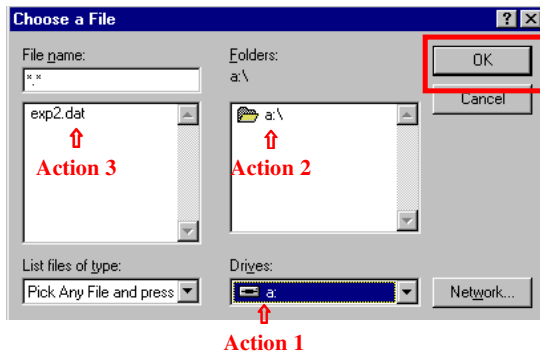
Following is a list of actions to take when choosing the proper importing file or directory.

1. Select the drive first, C or A (see the two Choose a File screens below – one for the C Drive and one for the A Drive – see CatLess4-12 and CatLess4-13, below).
2. Select the folder from a list of displayed folders.
3. Select the file from the files listed or, if *Import a Whole Disk or Directory* has been selected, then all files will be processed automatically.

Choose a File – C Drive



Choose a File – A Drive



Once the correct file/directory has been selected for importing, click on **OK**.

Step 6: Process the File or Directory

After a valid MARC file has (or all files have) been selected, the **Marc Record Import Handling** screen will reappear. Go on to select either *Process File Now* (for a single MARC file) or *Process Directory Now* (for an entire disk or directory of files), depending on which type of file is being imported (CatLess4-14, below).

NOTE: In this instance, “duplicate” refers to items already in the live catalog, not records located in the review area.

Marc Record Import Handling

Marc Record Type: Authority Bibliography

Empty Review File?

Import File: C:\New Imports\MYMARCS.MR

Choose a Single Marc File

Import a Whole Disk or Directory

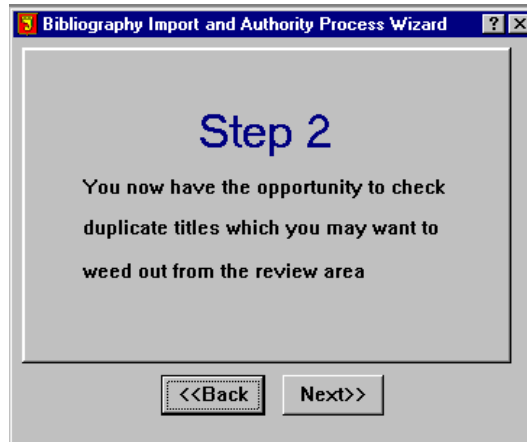
E:\KRIS\IMPORT*. *

Name	Date	Time	Size	Attrib

Step 7: Search for Duplicate Titles

Once the file or directory is processed, a screen is displayed that says, **Step 2 --You now have the opportunity to check duplicate titles [records] that you may want to weed out from the review area** (see CatLess4-15, below).

NOTE: In this instance, duplicate records refers to items already in the live catalog, not records duplicated in the review area.



Locate Duplicates First

Although the importing function is a wonderful feature of the CatEdit program, it can cause problems when a user mistakenly adds new records to a MARC database and those records already exist. Such a situation will not help any database users – it will only hinder the search and cataloging processes. As such, it is absolutely essential that BEFORE a system user imports a new title into the database of active or current records, he or she make sure that there are no duplicates of that title already held in the active records.

Do Detective Work

Sometimes, it is difficult to determine whether there are actually any duplicate titles, and it takes some detective work on the part of a user. For instance, from the newly imported records (top) screen to the active records (bottom) screen, there might be subtle differences between seemingly “identical” titles (such as capitalization differences, spelling differences, etc). Upon closer look at the “guts” of each record, a user can locate other, more significant differences.

Conduct Three “Quick Find” Searches

Because there is no automatic search mechanism that searches for duplicate records using all three search criteria (author, title, ISBN) available in the CatEdit program, a system user must be personally responsible for making sure that there are no duplicates in the system. To be certain that any and all potential duplicate records are located, it is recommended that a user conduct three separate “Quick Find” searches using all three search criteria – title, author, and ISBN. Of course, this is a “belt and suspenders” approach to seeking out duplicates, but it is better to be on the safe side and to conduct a more comprehensive search in the process.

NOTE: As a library's on-line catalog grows larger, it becomes more difficult to manage the information in it, especially duplicate information. As such, it is recommended that a library establish and follow strict and consistent rules for adding new records. Hopefully, such rules will help a user to avoid committing duplicate records to the system.

Step 8: Compare Duplicate Records

Once any duplicate “old” or “active” records are located, they must be compared to the newly imported record. After *Next>>* has been selected from the bottom of the **Step 2** screen, the **Handle Newly Imported Bibliography** screen appears (CatLess4-16, below), showing the newly imported records at the top of the screen and your library's previously cataloged MARC records (“live” or “active” records) at the bottom of the screen.

Title	Author	Isbn	Publi	Phys Desc
Albert's Christmas / written & illustrated by	Tryon, Leslie	0689810342	1997	1 v. (unpaged) : col. ill. ; 26 cm.
Amanda Pig, schoolgirl / Jean Van Leeu/Van Leeuwen, Jean		0141303573	1999	48 p. : col. ill. ; 24 cm.
Anansi does the impossible! : an Ashanti	Aardema, Verna	0689839332	1997	1 v. (unpaged) : col. ill. ; 27 cm.
Ant plays Bear / by Betsy Byars ; illustrati	Byars, Betsy Cromer	0141303514	1999	31 p. : col. ill. ; 23 cm.
Beethoven lives upstairs / Barbara Nich	Nichol, Barbara	0531071189	1999	1 v. (unpaged) : col. ill. ; 26 cm.
The Berenstain Bears and the blame gar	Berenstain, Stan	0679887431	1997	1 v. (unpaged) : col. ill. ; 21 cm.
The Berenstain Bears and the homework	Berenstain, Stan	067988744X	1997	1 v. (unpaged) : col. ill. ; 21 cm.
The Berenstain Bears and too much tea	Berenstain, Stan	0679877061	1995	1 v. (unpaged) : col. ill. ; 20 cm.
The Berenstain Bears count their blessin	Berenstain, Stan	067987707X	1995	1 v. (unpaged) : col. ill. ; 21 cm.

Title	Author	Isbn	Publi	Phys Desc
An ABC For You And Me	Tempest, Margaret	85503 022 4	1948	paper
The Appalachian Trail	Fisher, Ronald	087044106X	1972	Hardcover
An Inquiry Into the Nature and Causes	Smith, Adam		1952	Hardcover
An Introduction to Picture Framing	Frank, Vivien	1573353000	1995	Hardcover
East of Eden and the Wayward Bus	Steinbeck, John		1952	Hardback
The Three Billy Goats Gruff	Asbjornsen, P.C.	0156901501	1985	Trade
Call to Arms	Griffin, W.E.B	0515093491	1987	Paperback

NOTE: You may also open the **Handle Newly Imported Bibliography** screen by selecting the “double-screen computer” icon at the top of the opening Lib/Net screen (see image below, CatLess4-16a).



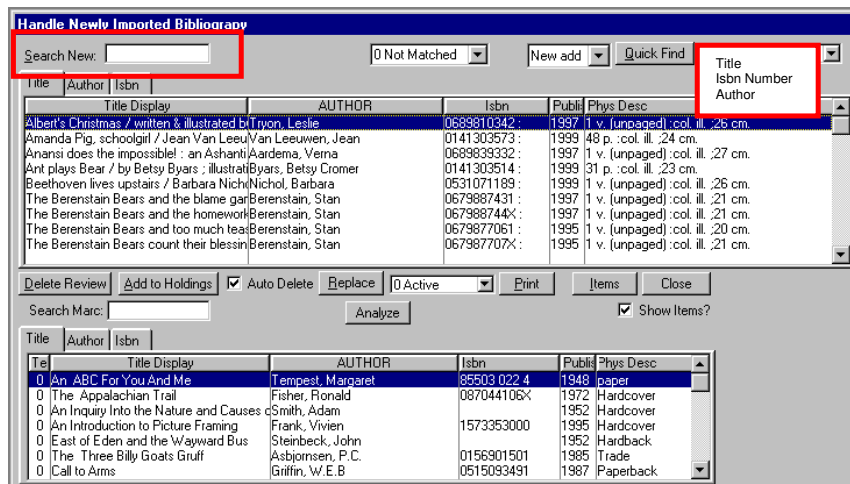
To avoid committing a newly imported record to the database that is a duplicate of active records that already exist in that database, at the **Handle Newly Imported Bibliography** screen, COMPARE the newly imported records (top of the screen) with similar records in the current holdings (bottom of the screen).

To locate matching records, use the *Search New* function in combination with the *Quick Find* function (CatLess4-22 below).

The **Search New** function locates a specific newly imported record in the review area. For instance, if a user has a particular record in mind, that user can search the list of newly imported records using the standard criteria of title, author, or ISBN. Take the following steps to do so.

1. Select one of the tabs labeled “title”, “author”, or Isbn” from the top of the title display.
2. Type the title, author, or ISBN into the “Search New” box located at the left top of the screen (refer again to CatLess4-17, below).
3. Press the **Tab** key on your computer keyboard.

The **Quick Find** function locates active MARC records from the current database that might match a specific record (already selected from the newly imported records) after a user selects one of the standard search criteria (title, ISBN, author) from the pull-down menu to the right of that button (CatLess4-17 below).



Using “Search New” in Combination with “Quick Find”

Example 1: How to Locate a Specific, Newly Imported Item

To locate the title *Under the Tuscan Sun* from the list of newly imported items, take the following steps. For each step, refer to information in red boxes in the screen (CatLess4-18, below) reprinted below.

1. Select the **Title** tab (or, alternatively, the **Author** or **ISBN** tabs could be selected, depending on the type of search you wish to conduct).
2. Type the key word “under” in the empty box to the right of the Search New box (see CatLess4-18 below).
3. Press the **Tab** key on the keyboard to activate the search.

The system will locate *Under the Tuscan Sun* in the list of newly imported titles (top list – see CatLess4-18 below) using the word “under” as a guide to locate this title.

The screenshot shows the software interface with the following elements:

- Step 2:** Search New: (highlighted in red)
- Step 3:** Quick Find (highlighted in red)
- Search Results (Top List):**

Title Display	AUTHOR	Isbn	Publi	Phys Desc
Under the Tuscan sun : at home in Italy	Mayes, Frances	0767900383 (pbk)	1997	280 p. ;21 cm.
Under the Tuscan sun : at home in Italy	Mayes, Frances	0811808424	1996	280 p. ;21 cm.
Under the Tuscan sun : at home in Italy	Mayes, Frances	0811808424	1996	280 p. ;21 cm.
Under the Tuscan sun [at home in Italy]	Mayes, Frances	0553525204 :	1998	4 sound cassettes (360 min.) :Dolby processe
The voyage of the Dawn Treader / C.S. Lewis, C.S	Lewis, C.S	0064471071 :	1994	271 p. :ill. ;18 cm.
Water dance / Thomas Locker.	Locker, Thomas	0152012842 :	1997	1 v. (unpaged) :col. ill. ;24 x 28 cm.
When will it be spring? / Catherine Walte	Walters, Catherine	0525465294 :	1997	1 v. (unpaged) :col. ill. ;16 cm.
Whistle for Willie / Ezra Jack Keats.	Keats, Ezra Jack	0140502025 :	1977	1 v. (unpaged) :col. ill. ;20 x 23 cm.
Why so sad, Brown Rabbit? / by Sherida	Cain, Sheridan	0140568158 :	1. c	1 v. (unpaged) :col. ill. ;21 x 25 cm.
- Search Results (Bottom List):**

Title	Author	Isbn	Public	Phys Desc
0 An ABC For You And Me	Tempest, Margaret	85503 022 4	1948	paper
0 The Appalachian Trail	Fisher, Ronald	087044106X	1972	Hardcover
0 An Inquiry Into the Nature and Causes of	Smith, Adam		1952	Hardcover
0 An Introduction to Picture Framing	Frank, Vivien	1573353000	1995	Hardcover
0 East of Eden and the Wayward Bus	Steinbeck, John		1952	Hardback
0 The Three Billy Goats Gruff	Asbjomsen, P.C.	0156901501	1985	Trade
0 Call to Arms	Griffin, W.E.B	0515093491	1987	Paperback

NOTE 1: A user can be extremely specific when searching the newly imported records, or less specific, depending on the parameters of the search. Remember, the more specific the search key words are, the more accurate the search results will be.

NOTE 2: Rather than searching for a particular new title by typing it into the “Search New” box, scroll down through the list of newly imported items until you find it, then be sure to position the cursor on that entry. Once that entry is selected, the system will highlight it in blue.

Example 2: How to Locate Duplicate Titles

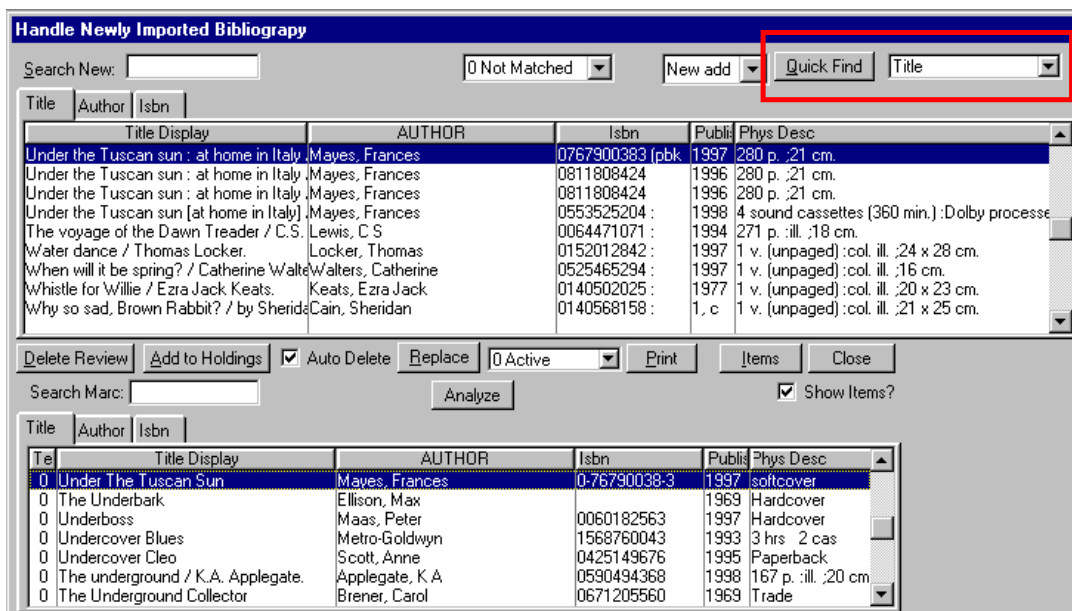
Search the active MARC records for titles that are similar or identical to *Under the Tuscan Sun* by taking the following steps. Before proceeding, though, be sure that *Under the Tuscan Sun* has been highlighted in blue on the top or import screen.

1. Click on the Quick Find button again after making sure that Title has been selected in the dialog box to the right of this button (see CatLess4-19, below).

This will ensure that the system conducts a title search for the item already selected in the top or import screen. The image below shows the results of the “quick find” action.

At the bottom of the screen, the system search will reveal the closest possible (not necessarily identical) matches to the selected record at the top of the screen.

2. At this point, compare the title selected (highlighted in blue) at the top of the screen to those brought up on the bottom screen as matches to that title.



Notice that in this instance, on the **Handle Newly Imported Bibliography** screen shown below (see CatLess4-20), *Under the Tuscan Sun* appears in the newly imported (top) list four times and appears in the active MARC records (bottom) list once.

Handle Newly Imported Bibliography

Search New: 0 Not Matched New add Quick Find Title

	Title	Author	Isbn	Publi	Phys Desc
1	Under the Tuscan sun : at home in Italy	Mayes, Frances	0767900383 (pbk)	1997	280 p. ;21 cm.
2	Under the Tuscan sun : at home in Italy	Mayes, Frances	0811808424	1996	280 p. ;21 cm.
3	Under the Tuscan sun : at home in Italy	Mayes, Frances	0811808424	1996	280 p. ;21 cm.
4	Under the Tuscan sun [at home in Italy]	Mayes, Frances	0553525204 :	1998	4 sound cassettes (360 min.) :Dolby processe
	The voyage of the Dawn Treader / C.S.	Lewis, C S	0064471071 :	1994	271 p. :ill. ;18 cm.
	Water dance / Thomas Locker.	Locker, Thomas	0152012842 :	1997	1 v. (unpaged) :col. ill. ;24 x 28 cm.
	When will it be spring? / Catherine Walte	Walters, Catherine	0525465294 :	1997	1 v. (unpaged) :col. ill. ;16 cm.
	Whistle for Willie / Ezra Jack Keats.	Keats, Ezra Jack	0140502025 :	1977	1 v. (unpaged) :col. ill. ;20 x 23 cm.
	Why so sad, Brown Rabbit? / by Sherida	Cain, Sheridan	0140568158 :	1, c	1 v. (unpaged) :col. ill. ;21 x 25 cm.

Delete Review Add to Holdings Auto Delete Replace 0 Active Print Items Close

Search Marc: Analyze Show Items?

	Title	Author	Isbn	Publi	Phys Desc
1	0 Under The Tuscan Sun	Mayes, Frances	0-76790038-3	1997	softcover
	0 The Underbark	Ellison, Max		1969	Hardcover
	0 Underboss	Maas, Peter	0060182563	1997	Hardcover
	0 Undercover Blues	Metro-Goldwyn	1568760043	1993	3 hrs 2 cas
	0 Undercover Cleo	Scott, Anne	0425149676	1995	Paperback
	0 The underground / K.A. Applegate.	Applegate, K A	0590494368	1998	167 p. :ill. ;20 cm.
	0 The Underground Collector	Brener, Carol	0671205560	1969	Trade

Further, notice the difference among the two titles that is evident upon first glance:

- the newly imported titles (top screen) have been entered as: *Under the Tuscan sun: at home in Italy* or *Under the Tuscan sun [at home in Italy]*
- the active title (bottom screen) has been entered simply as: *Under the Tuscan Sun*

It is easy to see that the two titles are NOT identical, so it is worth considering whether to **import** the new title and **commit** it to the MARC database.

Compare these records further by using the **Full Marc Display** screen to decide whether to import any of the instances of newly imported titles for *Under the Tuscan Sun*.

Comparing Further -- Full MARC Display

To further compare the detail of these two records (*Under the Tuscan sun: at home in Italy* and *Under the Tuscan Sun*), double-click the mouse on either record to reach the comparison or **Full Marc Display** screen (CatLess4-21). Again, the top of the screen shows the new record and the bottom of the screen shows the current (active) MARC record for this title.

The screenshot shows a window titled "Full Marc Display" with two panes. The top pane is titled "New Review Marc Record" and the bottom pane is titled "Marc Record Currently in you Catalog".

Tag	Value
020	ISBN a0767900383 (pbk.)
035	System Control Num9(DLC) 97020218
040	Cataloging Source aDLCcDLCdDLC
043	Geographic Area Cocae-it---
050	LC Call Number aDG734.23b.M38 1997
082	Dewey Decimal CN a945/.5221
100	Author aMayes, Frances.
245	Title aUnder the Tuscan sun :bat home in Italy /cFrances Mayes.
250	Edition a1st Broadway Books trade pbk. ed.
260	Publisher aNew York :bBroadway Books,c1997.

Tag	Value
020	ISBN a0-76790038-3
100	Author aMayes, Francesn
245	Title aUnder The Tuscan Sunt
260	Publisher c1997
300	Dimensions asoftcover
949	i38751000135941aADULTd921eMayesf1g14hBT

Decisions to Make After Importing a New Title

After importing a new record, a user has some key decisions to make about that record relative to the MARC database. The options are to:

- add the newly imported title to the database
- replace an active record with the newly imported record
- delete the newly imported record because it is not needed
- make the newly imported record an “item” (additional copy*) of a current record

Add the Title

If the title does not already exist in the current holdings, then add it to the active records.

Replace the Title in the Current Holdings With the Newly Imported Title

Do this if a newly imported record has more accurate and complete information. Example: If the current record was committed to the holdings using “QuickMarc”, it probably lacks information that a newly imported, more complete record of the same title might offer.

Keep the Active Record in the Database of Current Holdings and Ignore the Newly Imported Record

Do this if the current record, when compared to the new record, contains more accurate and comprehensive information. Delete the newly imported title from the list of new imports on the top screen and leave the current record alone.

Create an Item (Additional Copy*) of an Existing Record

Make a newly imported record an existing record's “item”. Such a relationship might be considered as a “parent” (active) record with the MARC information with a “child” (newly imported) record or records (many children). In such a situation, the bar codes of the “child” records would be different from the parent record.

* Item records are “additional copies” of the same MARC record.

“Auto Delete” and “Delete Review” Functions

Before deciding to commit any newly imported records, it is first necessary to become familiar with and select the appropriate automatic options on the **Handle Newly Imported Bibliography** screen – *Auto Delete* and *Delete Review*.

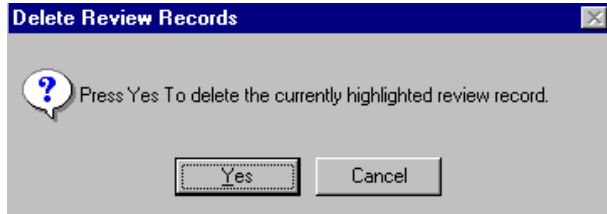
The screenshot shows the 'Handle Newly Imported Bibliography' window. The top section contains a search bar and a table of imported records. The table has columns: Title, Author, Isbn, Publi, and Phys Desc. The first row is highlighted: 'Under the Tuscan sun : at home in Italy' by Mayes, Frances, ISBN 0767900383, published in 1997, 280 pages, 21 cm. Below the table is a control bar with buttons: 'Delete Review', 'Add to Holdings', 'Auto Delete' (checked), 'Replace', '0 Active', 'Print', 'Items', and 'Close'. Below the control bar is another search bar 'Search Marc:' and an 'Analyze' button. At the bottom is another table with columns: Te, Title Display, AUTHOR, Isbn, Publi, and Phys Desc. This table lists records with a '0' in the 'Te' column, including 'Under The Tuscan Sun' by Mayes, Frances, ISBN 0-76790038-3, published in 1997, softcover.

Auto Delete

If *Auto Delete* has been checked (which is the default system setting, see CatLess4-22 above), the imported items shown at the top of the screen will be automatically deleted by the system from that top screen as you, the user, add them to the bottom screen of active MARC records. If *Auto Delete* is not checked, a record can be imported more than once (for such purposes as multiple volumes, editions, etc.)

Delete Review

The words “delete review” refer to the system user’s option of **deleting** a record that has already been **reviewed**. Once you have thoroughly reviewed a newly imported record and have decided it cannot be used, you may manually select that item, then click on the **Delete Review** button (see CatLess4-22, previous page) to delete that imported record. Once the **Delete Review** button is selected, a **Delete Review Records** dialogue box (CatLess4-22a, below) will appear. Select the **Yes** key to delete the reviewed record.



How to Add a Holding

To add a holding, take the following steps, starting at the **Handle Newly Imported Bibliography** screen.

1. Select the title from the list of newly imported records (in this case, *Count of Narbonne; a tragedy, in five acts* has been selected on the screen shown below, CatLess4-23) that you wish to add by placing the cursor on that record.

Handle Newly Imported Bibliography

Search New: 0 Not Matched

Title	Author	Isbn	Publi	Phys Desc
The Count of Narbonne	Jephson, Robert			62 p. front. 16 cm.
Count of Narbonne; a tragedy, in five acts	Jephson, Robert	1824	12 p. 1 illus.	23 cm.
The Count of Narbonne, a tragedy. As it appeared	Jephson, Robert		1781	5 p.l., 80, [4] p. 21 cm.
The count of Narbonne. A tragedy. By Robert	Jephson, Robert		1815	60 p. illus. 13 cm.

Auto Delete

Search Marc: Use Clip Board Show Items?

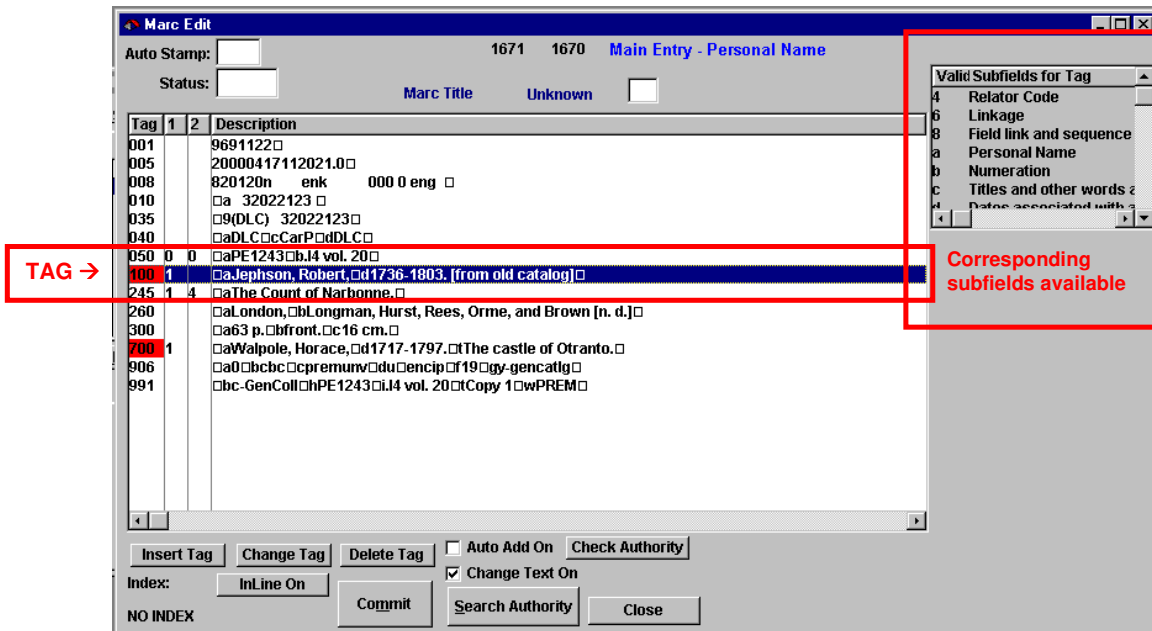
Title	Author	Isbn	Publi	Phys Desc
0 The 1	Mann, Carol	0681414553	1992	Hardcover
0 1 2 3	Snapshot	1564585344	1994	Boardbook
0 10 Lb. Penalty	Francis, Dick	0399143475	1997	3hrs
0 10 Lb. Penalty	Francis, Dick	0399143025	1997	Hardback
0 10 Minute Guide to Motivating People	Cook, Marshall	002861738X	1997	Trade
0 The 100 Best Small Art Towns in America	Villani, John	1-56261-275-1	1996	trade
0 100 Years in Leelanau	Littell, Edmund		1965	Trade

2. Click on the **Add to Holdings** button at the center of the screen (see CatLess4-23, above), located between the new imports and the active MARC holdings.

- This action will automatically bring up the “ExpertMarc” or **Marc Edit** screen (CatLess4-24) shown below.

At this screen, a user can make any necessary changes to the record (if you haven't already) at this screen by using the *Insert Tag*, *Change Tag*, or *Delete Tag* functions as needed, along with the other option keys at the bottom of the screen.

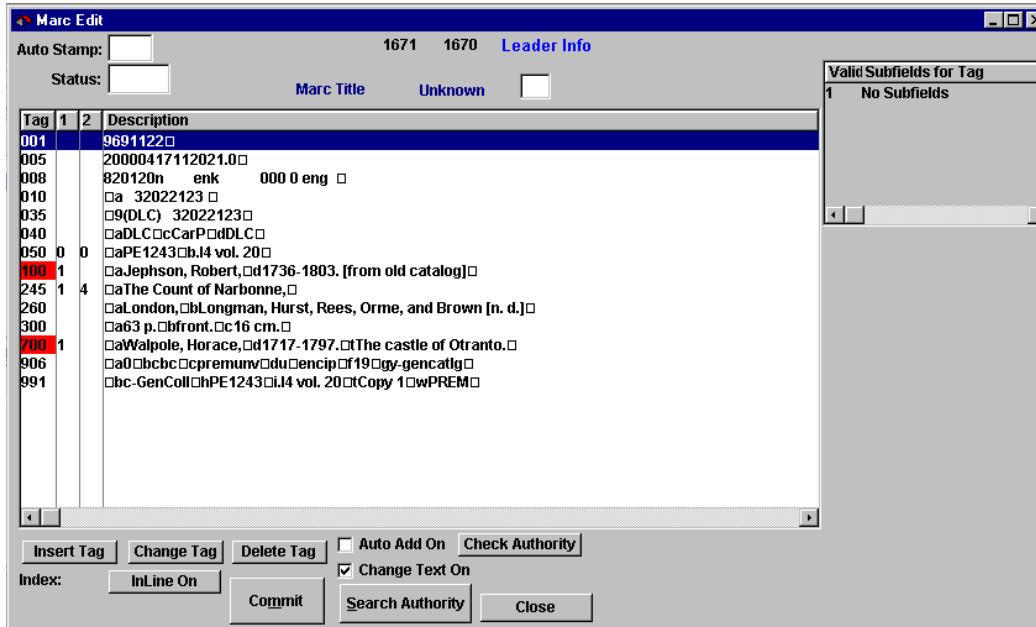
NOTE: To the right of the tags screen, notice that there is a box titled, “Valid Subfields for Tag”. This shows all of the subfields available for each tag within the system (see CatLess4-24, below).



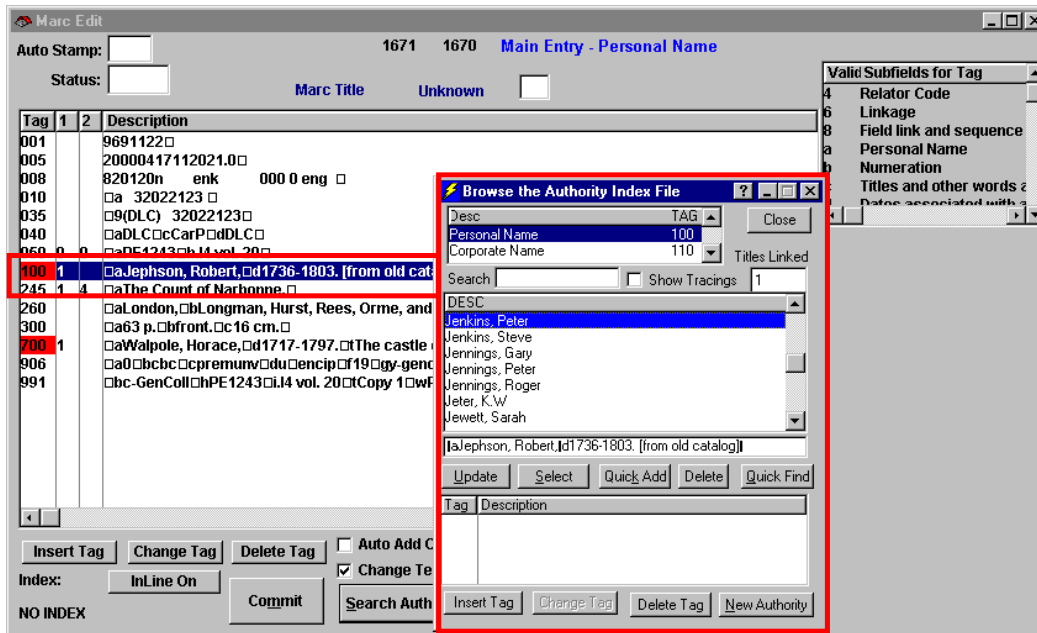
As well, the authority for all of the red tags on this record must be verified or “resolved”. In this case, Tags 100 and 700 are red (CatLess4-25, below).

First, be sure that the Auto Add On button is turned OFF.

Select the Check Authority button at the bottom of the screen (see CatLess4-25, below). This action will validate all of the tags. All “valid” tags turn green. In the case of CatLess4-25, below, none of the red tags turned green, (see the next section, “Handling Authority for Newly Imported Records” for an example of a record with green tags), so the red tags still need to be resolved.



To continue with the tag resolution process, highlight **Tag 100**, then select the *Search Authority* button. The **Browse the Authority Index File** screen will appear (see CatLess4-26, below).

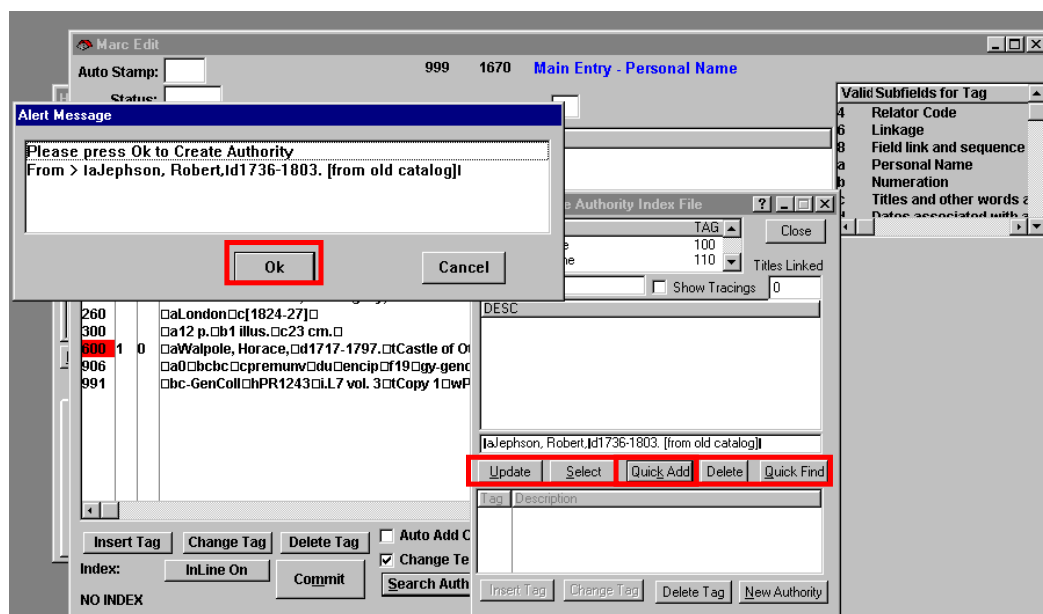


At this point, the choices are to:

highlight a name on the list of names presented for Tag 100, then select the **Update** key to update Tag 100 on the record with the highlighted information (see CatLess4-27, below), essentially REPLACING the current information with new information from the authority list,

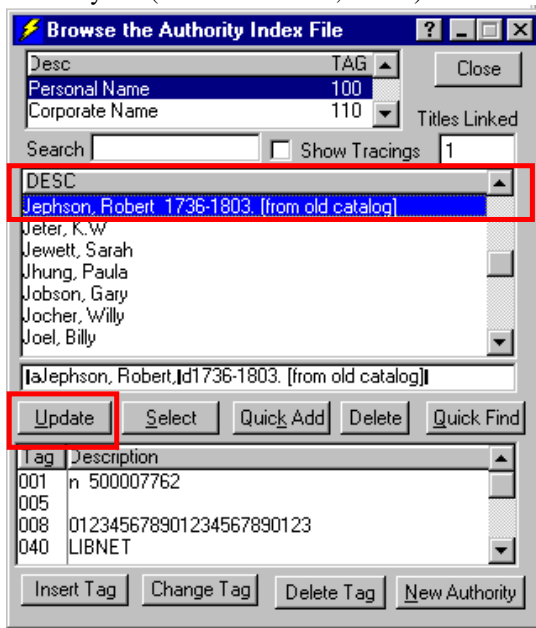
or

select the **Quick Add** key to add the information in the box (see CatLess4-27, below -- duplicated from the current Tag 100, in this case, "Jephson, Robert," etc.) into the authority database.



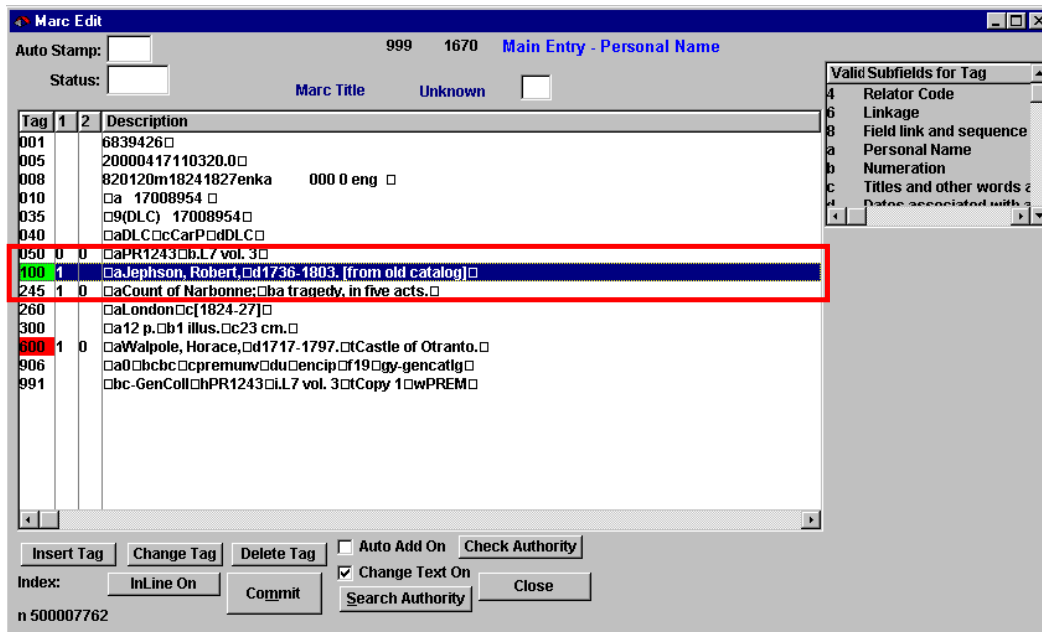
In the case of the example above, the **Quick Add** button was chosen and "Jephson, Robert, d1736-1803" was highlighted in the box located below the **DESC** box. This brought up an **Alert Message** screen, where either **Ok** or **Cancel** must be selected. **Ok** was selected to update the system and to include this information about Jephson, Robert in its authority.

This automatically created the new authority record and automatically highlighted it in the authority list (see CatLess4-28, below).



Next, the new information about Jephson, Robert, must be “officially” selected by the user from the authority menu, so that it can be assigned to Tag 100 of the record in question. To do this, choose the *Update* key (see CatLess4-28, above) and the system will automatically update the record to reflect this new information.

Tag 100 on the record is now "resolved" and, therefore, green (see CatLess4-29, below).



NOTE: Remember, after all tags are resolved, so that ALL authority changes register in the system, the **Commit** button must be selected before exiting this screen.

Handling Authority for Newly Imported Records

Step 1: To return to the “New add” area (the top of the **Handle Newly Imported Bibliography** screen) where the newly imported records are being held before they are committed to the system, at the opening Lib/Net screen, select the icon with the two screens on it (CatLess4-30, below).



This action opens the **Handle Newly Imported Bibliography** screen again, and the “New add” area appears (see CatLess4-31, below).

Step 2: At this screen, select a record for which you wish to check authority. In the case of the example below, a record with the title *Hanzel and Pretzel* has been selected.

Handle Newly Imported Bibliography

Search New: 0 Not Matched New add Quick Find Title

Title	Author	Isbn	Publi	Phys Desc
Froggy gets dressed / by Jonathan Lond	London, Jonathan	0140544577 :	1994	1 v. (unpaged) :col. ill. ;18 x 23 cm.
The future: an owner's manual : what the	Pondiscio, Robert	0380803356 :		239 p. ;20 cm.
The grave / James Heneghan.	Heneghan, James	0374327653 :		245 p. ;20 cm.
Great Smoky Mountains National Park /	Petersen, David	0516013327 :	1993	45 p. :col. ill., maps, ;22 cm.
Hang tough, Paul Mather / Alfred	Stote, Alfred	0064401537 :	1985	1196 p. ;20 cm.
Hanzel and Pretzel / by Mike Thaler ; ill.	Thaler, Mike	0690898272 :	1997	1 v. (unpaged) :col. ill. ;21 cm.
Happy Valentine's Day, Miss Hildy / by L	Grambling, Lois G	0679688705 :	1998	1 v. (unpaged) :col. ill. ;23 cm.
Harry, the dirty dog / by Gene Zion ; pict	Zion, Gene	006443009X :	1956	(32) p. :col. ill. ;27 cm.
Henry and Mudge and the best day of al	Rylant, Cynthia	0689813856 :	1997	40 p. :col. ill. ;23 cm.

Delete Review Add to Holdings Auto Delete Replace 0 Active Print Items Close

Search Marc: Analyze Show Items?

Title	Author	Isbn	Publi	Phys Desc
0 The 1	Mann, Carol	0681414553	1992	Hardcover
0 1 2 3	Snapshot	1564585344	1994	Boardbook
0 10 Lb. Penalty	Francis, Dick	0399143475	1997	3hrs
0 10 Lb. Penalty	Francis, Dick	0399143025	1997	Hardback
0 10 Minute Guide to Motivating People	Cook, Marshall	002861738X	1997	Trade
0 The 100 Best Small Art Towns in Americ	Villani, John	1-56261-275-1	1996	trade
0 100 Years in Leelanau	Littell, Edmund		1965	Trade

Step 3: Now, select the *Add to Holdings* button (refer back to CatLess4-31, above).

As described earlier, once the *Add to Holdings* button has been selected for a record – in this case, *Hanzel and Pretzel* -- the new MARC record will automatically open up in the “expert edit” mode, on the **Marc Edit** screen (see CatLess4-32, below).

Tag	1	2	Description
001			pb97130650
003			J.PBB
005			19980401163015.0
008			980401s1997 nyua j 000 1 eng
010			a 96068252
020			a0590898272 :c\$8.90
040			aDLCcDLCdDLCdlJPBB
050	4		aPZ8.T
082	1	4	aE221
092			aFIC THA
100	1		aThaler, Mike,d1936
245	1	0	aHanzel and Pretzel /cby Mike Thaler ; illustrated by Jared Lee.
260			aNew York :bScholastic,cc1997.
300			a1 v. (unpaged) :bcoll. ill. ;c21 cm.
440	0		aHappily ever laughter
520			aln this zary send-up, Hanzel and Pretzel eat a witch out of gingerbread house and home. When sh
650	1		aFairy tales.
650	1		aHumorous stories.
650	7		aFairy tales.2sears
650	7		aHumorous fiction.2sears

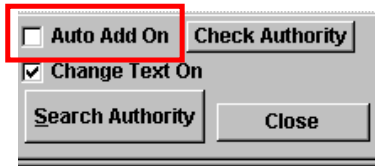
On this screen, tags highlighted in **red** indicate that those tag's authorities have not yet been verified in the authority file.

NOTE: Refer to the next lesson for more information about maintaining authorities.

At this time, a user must make sure that a newly imported record's authorities are not duplicated, and that any new authorities are entered properly into the system.

Step 4: Because the *Auto Add On* button will automatically add all incoming authority without checking it first, check the status of this button now. **BE SURE THAT THIS FUNCTION IS ALWAYS TURNED OFF**, which it should be by system default (CatLess4-33, below).

NOTE: *Auto Add On* typically is used only when importing an entire catalog.



Creating Authority

For this example, the intent is to resolve the 440 Tag by creating new authority from the information provided next to the tag. To do so, select the *Quick Add* button at the **Browse Authority Index File** screen, because this takes the information already included next to Tag 440, and **creates a new authority entry** in the system.

Use the *Quick Add* button to create a new authority record, and it will automatically appear in the authority list as a highlighted entry.

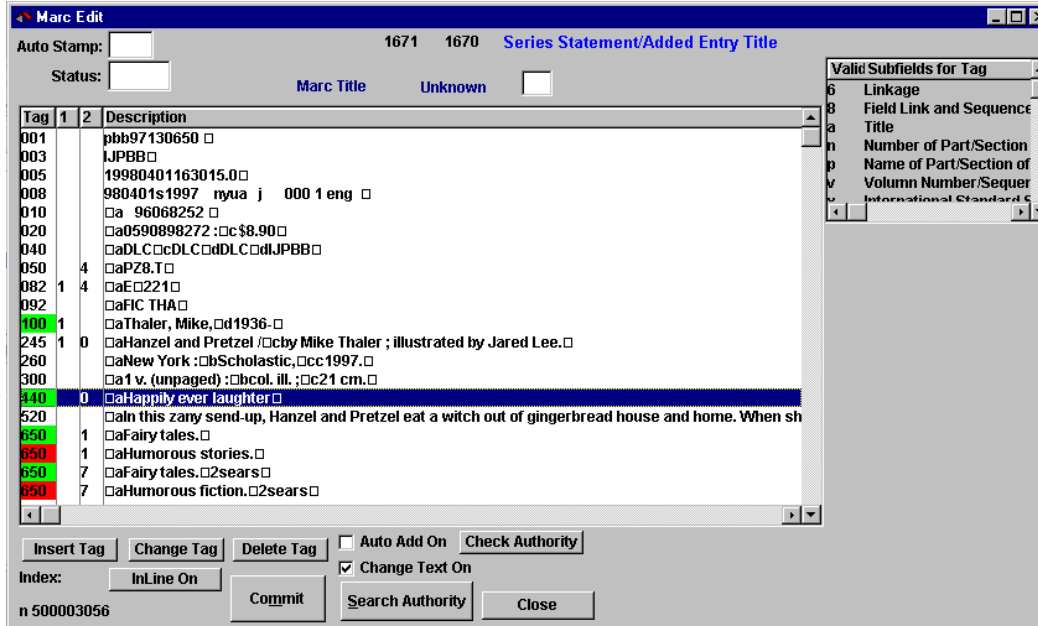
Use the *Update* button to “update” the record’s Tag 440 with the new authority entry.

Replacing Authority

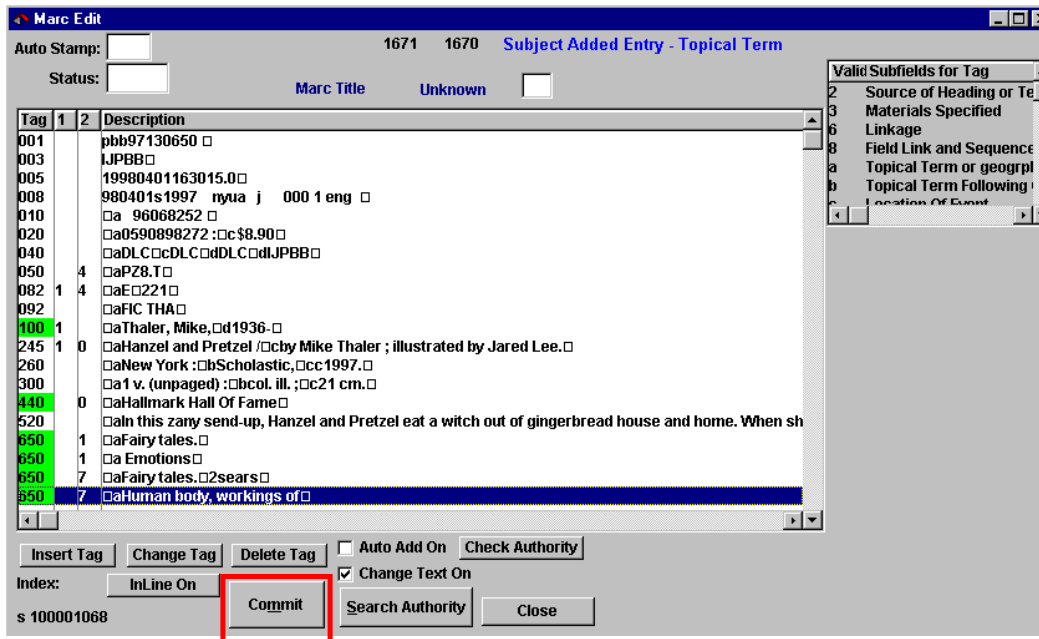
If a different authority record on the right side of the screen were selected other than *Happily Ever Laughter*, the *Update* button would take that highlighted record, in the case of the example above -- *Hallmark Hall of Fame* -- and, instead of the scenario outlined above, **replace** *Happily Ever Laughter* with *Hallmark Hall of Fame* in the MARC record.

NOTE: When the Change Text On box is checked, the system will automatically overwrite the authority that appears in the tag entry.

Step 7: Select the appropriate function -- in the case of Tag 440, the *Update* function was selected -- and the resolved tag will turn green (see CatLess4-34, below).

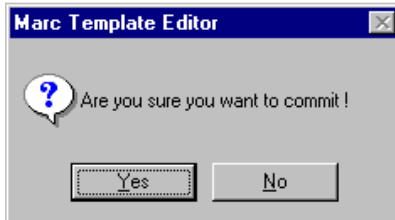


Step 8: Once all of the **red** tags have been resolved on a newly imported record and have turned **green**, once all authority has been checked and all edits have been made, it is time to **Commit** the record to the system by selecting that button from the bottom of the **Marc Edit** screen (refer to CatLess4-35, below).

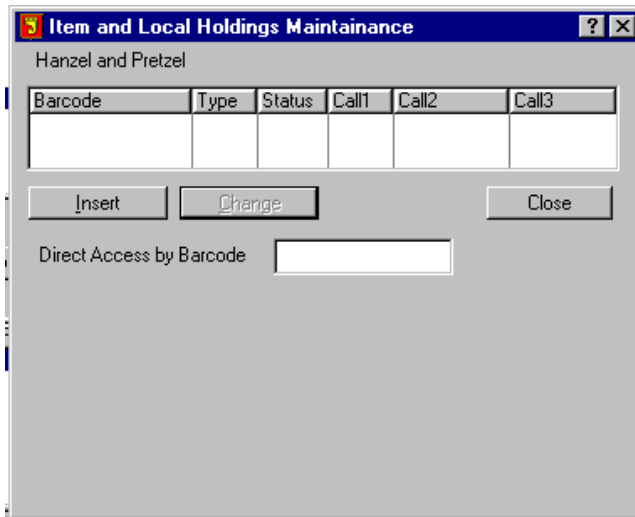


NOTE: If a user selects the **Close** button at the bottom of the screen, the system will not record any of the changes made during that edit session and all edits will be lost.

Step 9: Answer the question on the pop-up **Marc Template Editor** screen that asks, “Are you sure you want to commit!” (CatLess4-36, below).



Step 10: Once the *Yes* button has been selected, the **Item and Local Holdings Maintenance** screen appears (CatLess4-37, below). At this screen, more local information can be inserted into the record.



Step 11: This will bring up the **Update Items** screen. Type information into the selected area (such as Barcode, Type, Status, Call1, Call2, Call3, etc.), then select the **Ok** button (see CatLess4-38, below) to include these changes.

This will create an additional COPY of the “parent” or “originally imported” record.

The screenshot shows a dialog box titled "Update Items" with a close button (X) in the top right corner. The dialog contains the following fields and text:

- Barcode:
- Date Added: 4/10/2002
- Type:
- Call1: Call2: Call3:
- Price: Life to Date Circulation:
- COST: Year to Date Circulation:
- Status:
- Location:
- Hacode:

Record will be Added

There are no reserves on this item.

1

Lesson 5: Authority Maintenance

Introduction

Lesson 4 introduced the concept of “authority” and explains how authority must be handled for newly imported records. This lesson discusses how a library and its staff maintain authority within the database.

First, it is important to note that “authority control” is a standard or established form to be followed by catalogers, while “authority” just deals with the names and subjects of each MARC record.

It is also helpful to remember that a **MARC subject** is synonymous with a **MARC record**, because when a MARC subject is selected, in essence, the MARC record is being selected.

A list of approved headings from which a librarian can choose is an example of authority control. The implementation of authority control offers consistent, standardized methods of inputting catalog record data.

Authority Sources

The best source of authority for names is the *Library of Congress Name Authority File*, available from the Library of Congress Cataloging Distribution Service.

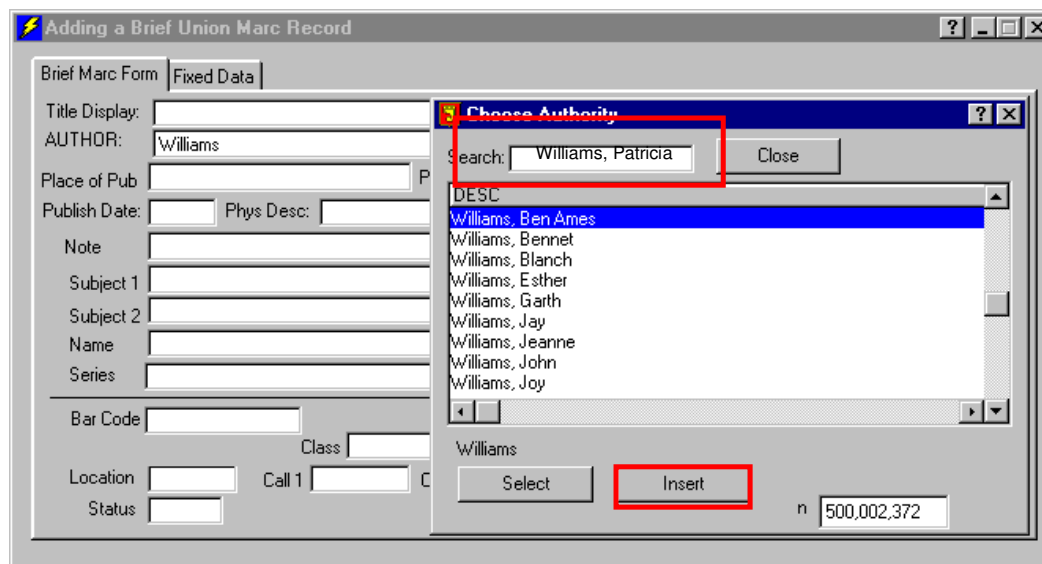
The *Library of Congress Subject Headings* or the *Sears List of Subject Headings* are commonly used to establish authority for topics and geographical names.

These national lists are the basis of local authority control lists, which are most important for each local library's data input. Local lists make it possible for a librarian to refer to and reuse a list of author's names or subject headings that already exist in the Catedit system so that these entries are standardized. This is the point of “authority control,” the point at which all names and subject headings are entered exactly the same way each time, regardless of who enters them into the database.

Authority control can be applied when creating a new record, when editing existing records, and when importing records. For instance, a local library might choose to convert some of a record's imported data to reflect the local customs of authority.

Each 1xx, 6xx, 7xx, etc. tag has its own “authority,” a subject or name which is on an “authority list” that appears when entering a subject or name into the system. The Library of Congress establishes lists of proper names for entering authors and subject headings and, in doing so, it has established “authority” where these options are concerned.

For instance, on the form pictured below (CatLess5-1, below), the name “Williams” was entered into the AUTHOR box on the **Adding a Brief Union Marc Record** screen. This general entry automatically causes the **Choose Authority** screen with an authority list to appear.



A user would then select the appropriate author's name from this list or, if the list does not contain the desired Williams – in this case, “Patricia Williams” -- then the user would add the new Williams to this list. The user would type the desired name into the **Search** bar at the top of the **Choose Authority** screen, then selecting the **Insert** button at the bottom of that screen to officially add that new name to the authority in the database.

This is the simplest example of authority maintenance. Maintaining authority can become more complex and much more detailed as required by local practices and desired outcomes.

NOTE: This lesson discusses authority maintenance relating to existing authority records in use in the MARC catalog.

Authority Maintenance Activities

The authority maintenance function of the Catalog Editor program can be used to accomplish these activities:

1. change an existing authority record and, in turn, correct each related MARC record
2. add new authority records
3. transfer MARC record tags from one authority record to another
4. delete authority, if no longer used

Simply put, “authority” information can be taken from somewhere else such as the Library of Congress, and put into a MARC record, or it can be entered by a user, based on “local authority” information and practices. Either way, a library must have strictly followed rules for authority maintenance so that authority is consistently applied to all entries throughout the database.

This lesson concerns the Catedit screens described below.

The “Expert Editor” or **Marc Edit** screen can be accessed through the **Browse the Union Marc by Title, Author, Isbn** screen (CatLess5-2, below.)

Marc Edit

Auto Stamp: Leader Info

Status: Marc Title Changing

Tag	1	2	Description
001			LBM717 <input type="checkbox"/>
005			19980926155936.0 <input type="checkbox"/>
008			FIXEDLENGTHDATAELEMENT <input type="checkbox"/>
020			<input type="checkbox"/> a0060167688 <input type="checkbox"/>
100			<input type="checkbox"/> alsaacs, Susan <input type="checkbox"/>
245			<input type="checkbox"/> aAfter All These Years <input type="checkbox"/>
260			<input type="checkbox"/> c1993 <input type="checkbox"/>
300			<input type="checkbox"/> aHardcover <input type="checkbox"/>
949			<input type="checkbox"/> i38751000080352 <input type="checkbox"/> aLP <input type="checkbox"/> bLP <input type="checkbox"/> dMYS <input type="checkbox"/> elsa <input type="checkbox"/> f1 <input type="checkbox"/>

Valid Subfields for Tag

1 No Subfields

1 Indicator

2 Indicators

Insert Tag Change Tag Delete Tag Auto Add On Check Authority

Index: InLine On Change Text On

Commit Search Authority Close

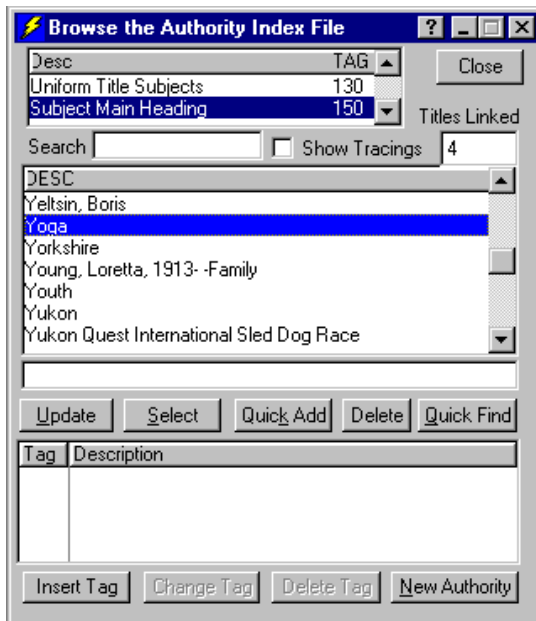
The **Authority** pull-down menu (CatLess5-3, below) at the very top of the opening **Lib/Net** screen . . .



features these choices:

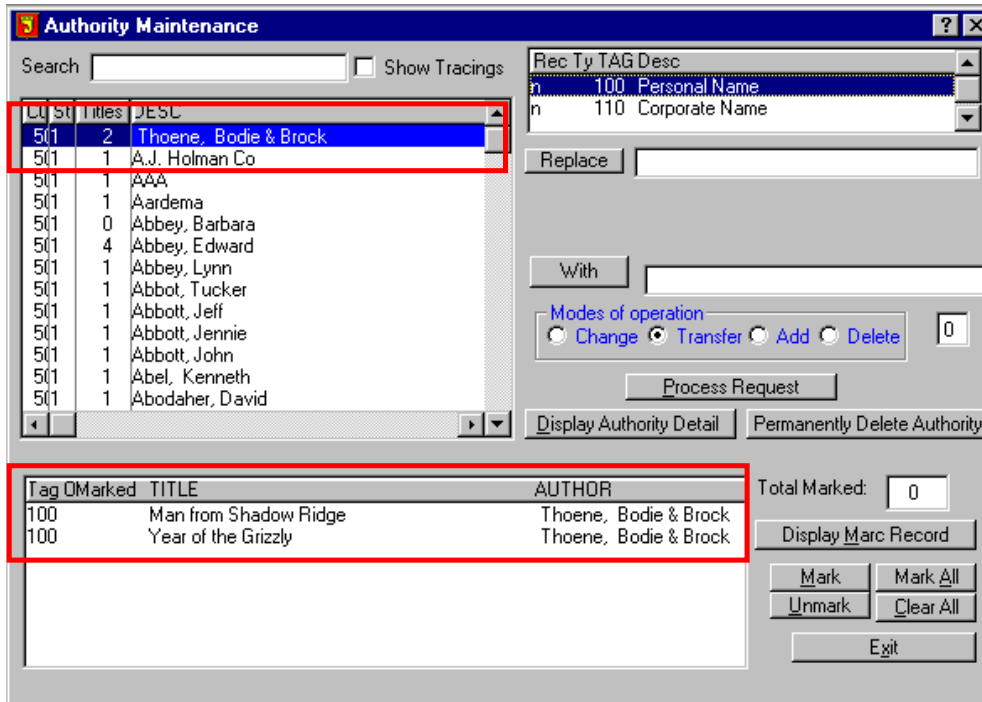
- Personal Names (Author)
- Topical Terms (Subject)
- Corporate Names
- Meeting Names
- Name Uniform Title
- Subject Uniform Title
- Geographic Names
- Authority Maintenance

Every choice on this list, except for “Authority Maintenance,” leads to a **Browse the Authority Index File** screen (see CatLess5-4, below) associated with that particular tag such as Personal Names (Author), Topical Terms (Subject), Corporate Names, Meeting Names, Name Uniform Title, Subject Uniform Title, or Geographic Names. The **Browse the Authority Index File** screen is used for searching records you wish to change.



The "Authority Maintenance" selection from the **Authority** pull-down menu leads to the **Authority Maintenance** screen (CatLess5-5, below), where authority for selected records can be changed, transferred, added, or deleted.

The top half of **Authority Maintenance** screen features the actual authority records already in the system. The bottom half of the screen shows a list of all holdings that have that particular authority attached to it (CatLess5-5, below).



Green Tags

In the “Expert Editor” mode, when there is a **green** highlighted tag within a record, there is a corresponding authority record for that subject or name that is already established in the system, **and** this particular tag is linked to it (see CatLess5-6, below).

The screenshot shows the Marc Edit window with the following data:

Tag	1	2	Description
001			LBM127
005			19980926161908.0
008			FIXEDLENGTHDATAELEMENT
020			a0805100032
245			aYukon Passage
260			c1977
300			a60 min
490			aNational Geographic
650			aYukon
650			aAlaska
949			3875100000632 aVID bVD eYUK f1

The tags 490, 650, and 650 are highlighted in green. The tag 300 is highlighted in red. The window also includes a 'Valid Subfields for Tag' panel on the right and a control panel at the bottom with buttons for Insert Tag, Change Tag, Delete Tag, Auto Add On, Check Authority, InLine On, Commit, Search Authority, and Close.

A record highlighted in **green** indicates that there is an authority entry associated with that record. It means that the authority entry is identical to the entry next to the highlighted tags.

NOTE: By contrast, if a tag on the Expert Editor screen is **red**, that tag is **NOT** linked to any authority record in the system. That tag will remain **red** until a user either links it to authority in the system or creates a new authority record for that tag. More information about red tags follows in the next section.

It is up to individual libraries to enforce consistency among new records. As such, it is recommended that libraries establish standards for consistent authority, then train employees to follow those standards.

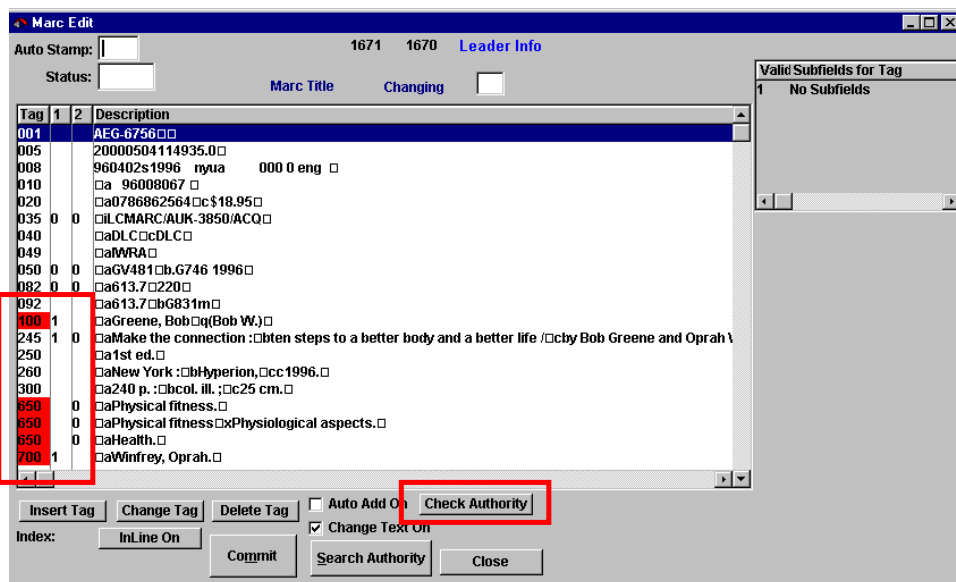
For instance, the author's name, Mark Twain, could be entered into a system's list of authority several different ways:

Twain, Mark
 Twain, mark
 TWAIN, mark
 TWAIN, MARK
 Twain, Mark
 Twain, M
 TwainMark

When establishing authority, a library and its staff would be called on to decide which of the above entries would be the acceptable one for the system. "Twain, Mark" is the best choice. However, an untrained employee might input Twain's name with several spaces between the first and last name one time, then the next time, use all lower case lettering, then the next time, capitalize some letters, but not others. Such an approach is inconsistent, and ultimately could waste a library's time and resources.

Red Tags

To "resolve" or verify any **red** tags that appear on a record in the Expert Edit mode, select the **Check Authority** button (see CatLess5-7, below). This button will link **red** tags to existing authority. If no authority exists, a **red** tag will remain **red** and unresolved. When this happens, take the following steps to place the subject or name into the authority list and to thereby resolve the tag. **This is one aspect of authority maintenance.**



Another aspect of authority maintenance is updating outdated authority files by downloading up-to-date lists from the Library of Congress, or by ordering a CD-Rom with updated lists on it.

Editing Authority Records Using the “Authority Maintenance” Screen

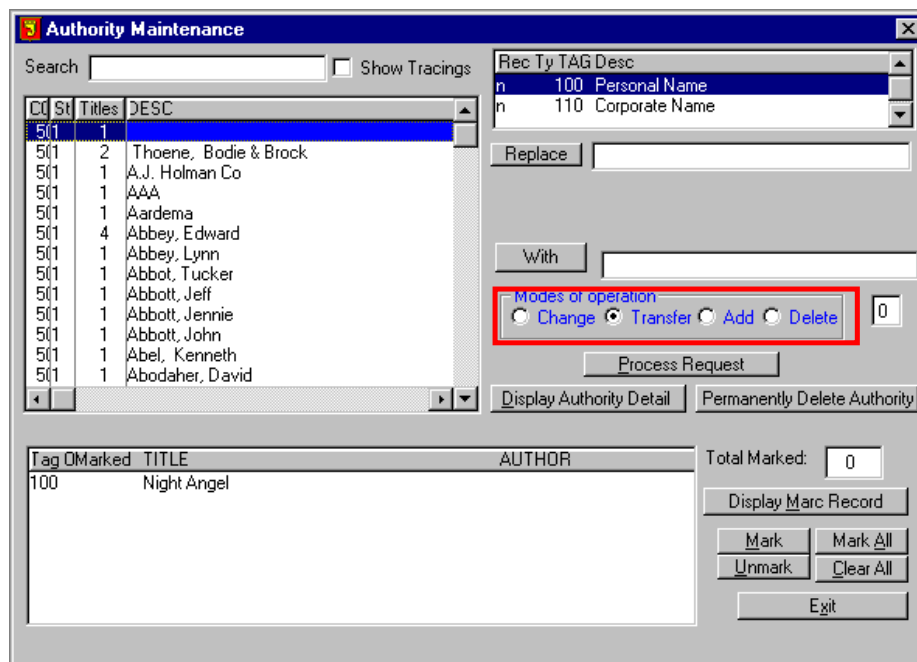
At the **Authority Maintenance** screen, you can create, delete, and edit authority records. Why is there a need to edit an authority record? Perhaps to resolve inconsistencies in authority entries, or to update or correct entries.

For instance, assume that a database of MARC records features three different versions of World War II:

World War II
World War ii
World War 11

It is probably wise to “clean up” the authority for those records by making them consistent. To maintain authority for these records and to resolve their discrepancies, a user would follow the steps outlined later in this section to merge the three records into one – the World War II record. This will lessen duplication and confusion, and will eliminate the technically incorrect references to World War II (World War ii and World War 11 are incorrect).

At the **Authority Maintenance** screen, the specific actions a user can take to clean up and maintain authority are to change, transfer, add, or delete authority (see CatLess5-8, below). The ensuing section focuses on those four options.



NOTE: Any time a user makes a change in authority maintenance, the records affected automatically turn into “ExpertMarc” records, rather than “QuickMarc” records.

How to Change an Authority Record

Example: A name, “Brown Dale,” has been entered incorrectly and must be changed to “Brown, Gale.”

To change/correct the incorrect authority record, take these steps.

Step 1: Open Authority

Go to the Authority Maintenance screen, by clicking on the word “Authority” at the top of the **Lib/Net** opening screen (CatLess5-9, below).



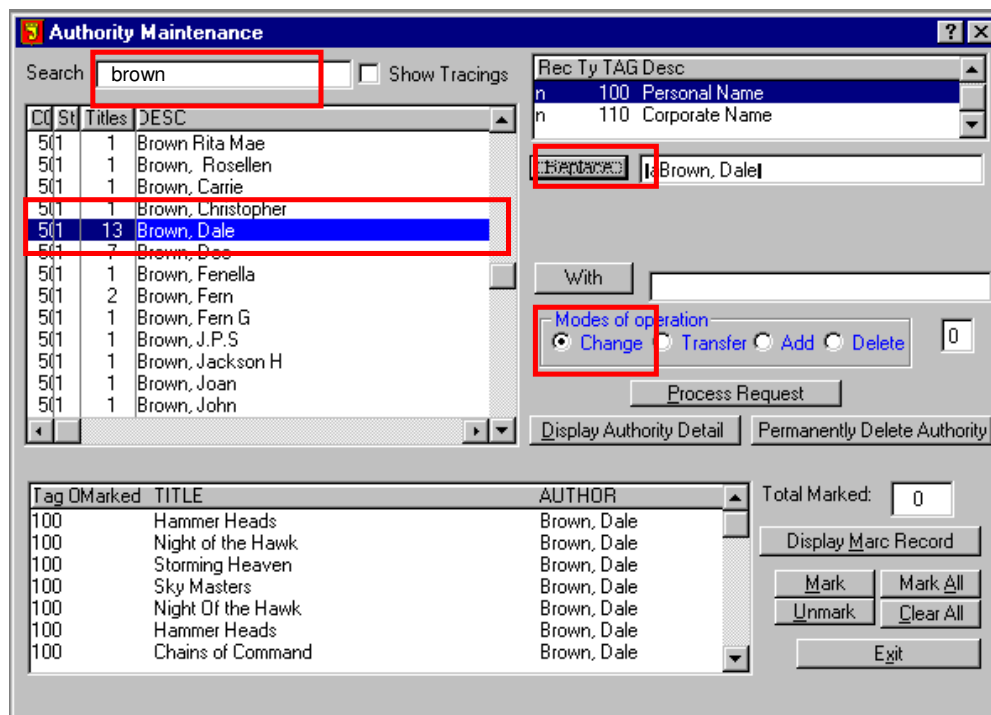
Step 2: Conduct a Search

NOTE: Make sure that the *Change* option has been selected so that a change actually will occur (see CatLess5-4g, below).

Type the name of the entry you wish to search for in the *Search* bar – in this case, “Brown” (see CatLess5-4g, below), then select the *Tab* key on your keyboard to process the search. Once the list of “Browns” comes up from the database, select the specific name of the person by clicking the mouse on it (in this case, “Brown, Dale,” see CatLess5-4g, below).

Step 3: Start the Replace Process

Select the *Replace* button (see CatLess5-10g, below), and the authority entry you wish to replace will appear in the box next to the *Replace* button (in this case, “Brown, Dale,” see CatLess5-10, below).



Step 4: Select "With"

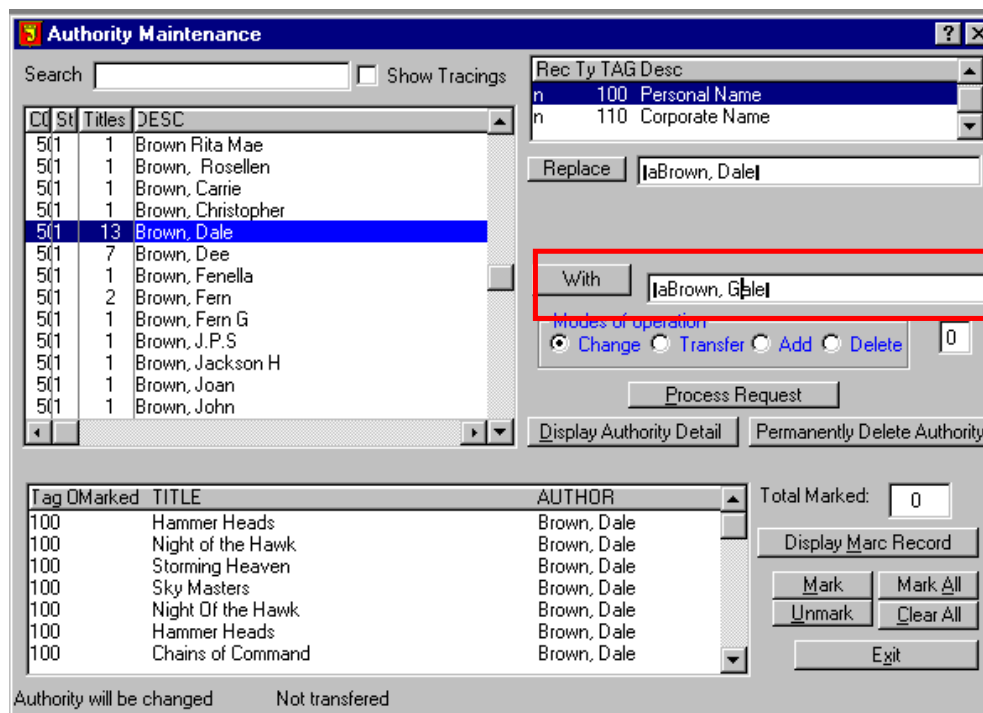
NOTE: When making authority changes, it is not necessary to mark any of the titles, because once processed, the system makes a global change that automatically affects the authority for all of the titles already associated with the authority being changed.

With the same authority selected, choose the **With** button on the Authority Maintenance screen (see CatLess5-11, below) and the same name, "Brown, Dale," will appear in the box next to the **With** button.

BEWARE: Do **NOT** bypass selecting the **With** button before making the change. Always select the **With** button so that the original entry, the entry that you wish to change, appears in the **With** box. Any changes have to be made directly to that original entry – changes **CANNOT** be typed into a blank **With** box from scratch because the system will not process the change properly.

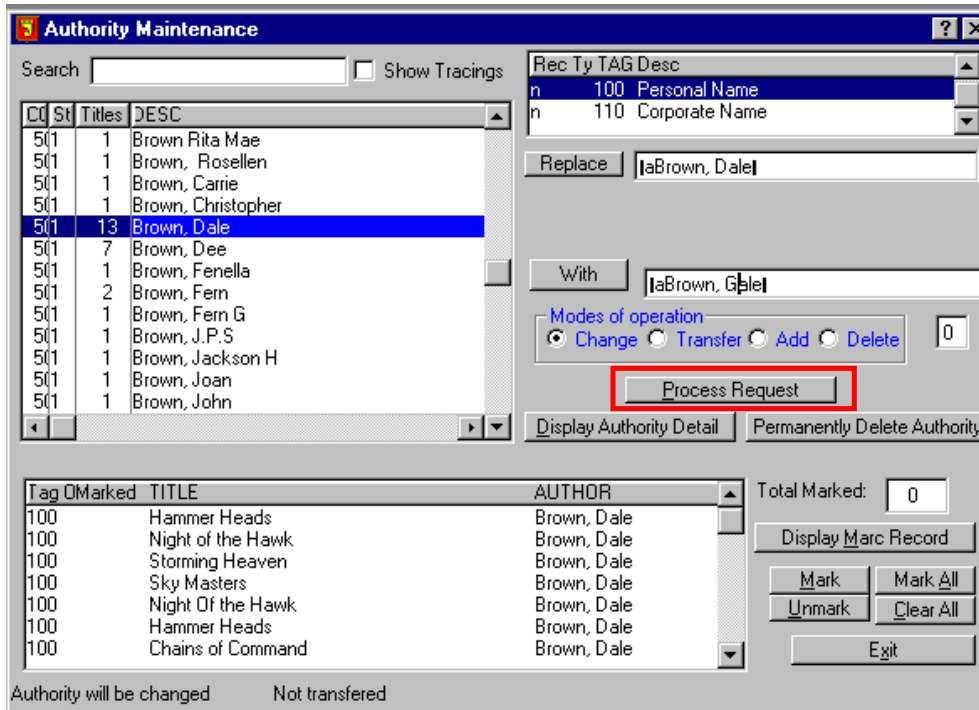
Step 5: Type Change

Because the name that has been selected, "Brown, Dale" does automatically appear in the **With** box, it is up to the user to change the current name by deleting all or part of it (in this case, delete the "D" in "Dale") and by typing the new character or name (in this instance, replace the "D" in "Dale" with "Gale" to result in "Gale") in place of it (see CatLess5-11, below).

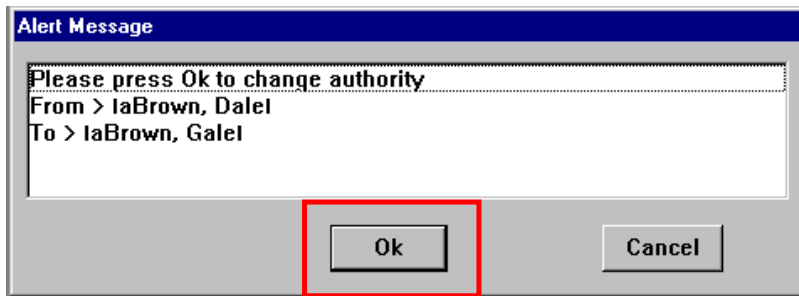


Step 6: Process Change

Select the *Process Request* button to update the records (see CatLess5-12, below).



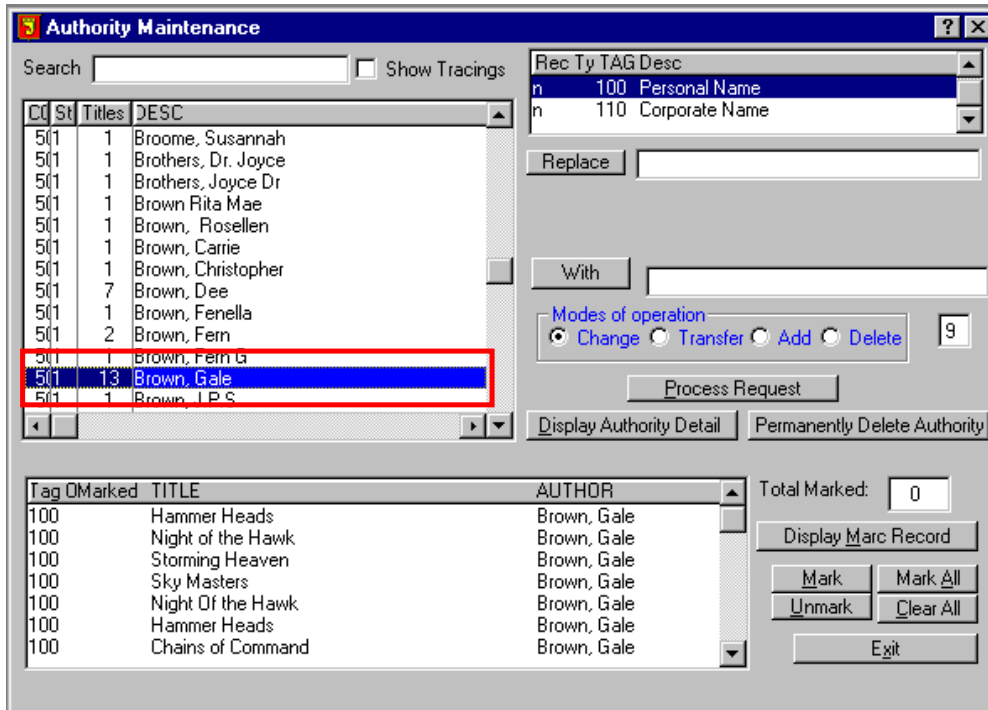
An **Alert Message** box will appear (see CatLess5-13, below) to verify the change.



Step 7: Okay the Change

Select **Ok** on the Alert Message box, and “Brown, Dale” will be changed to Brown, Gale (see CatLess5-13, above).

The resulting authority record looks like this (see Brown, Gale, in CatLess5-14, below) . . .



How to Merge or Transfer Authority Records

Example: Two similar authority records, “Aging,” and “Aging-Literary Collections” are being used. The goal is to transfer all of the MARC tags from one authority to another so that all records point to one authority

To merge these two authority records, take the following steps.

Step 1: Open Authority

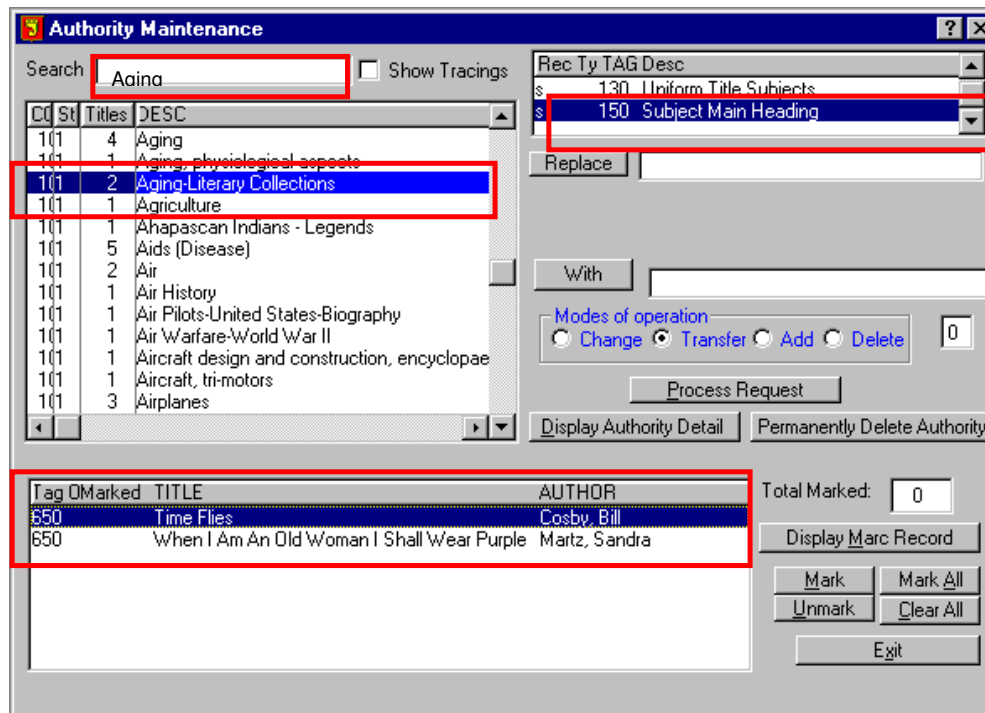
Go to the Authority Maintenance screen, by clicking on the word “Authority” at the top of the **Lib/Net** opening screen (CatLess5-9, below).



Step 2: Select a Tag and Conduct a Search

NOTE: Make sure that the *Transfer* option has been selected so that a transfer/merge actually will occur (see CatLess5-4g, below).

At the **Authority Maintenance** screen, select the appropriate tag – in the case of the example below, *150 Subject Main Heading* was selected (CatLess5-14, below). Then, type the subject in the *Search* box (in this case, “Aging”), and hit the *Tab* key on the keyboard to process the search.

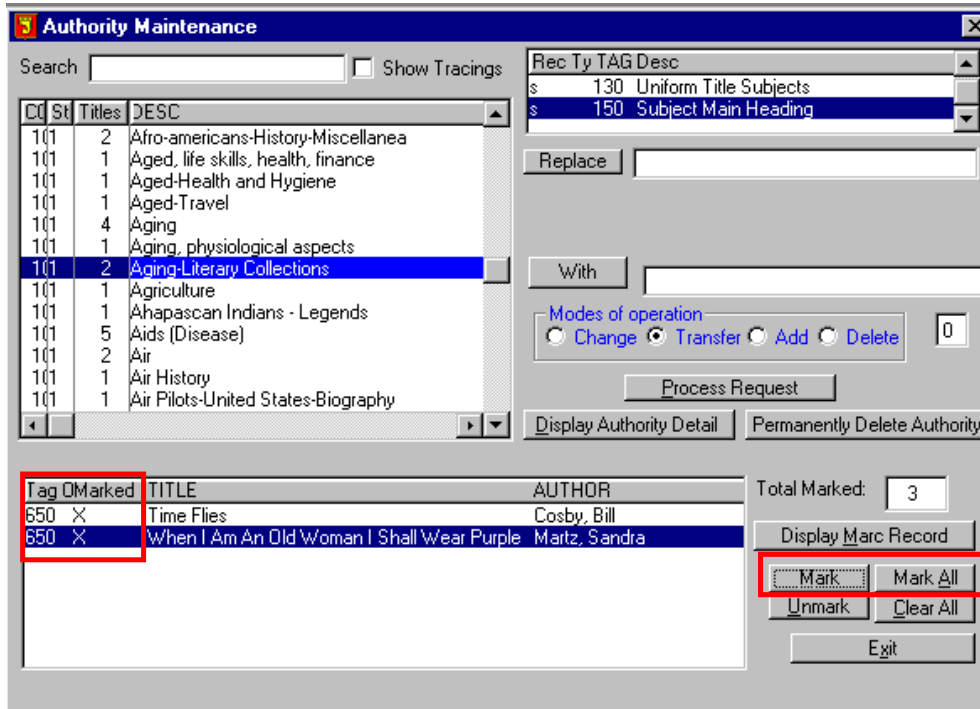


From the box of information at the top of the screen, select the authority entry you wish to transfer. In the case of the example above, it is “Aging-Literary Collections.”

Notice the MARC record tags and titles associated with that authority entry in the box at the bottom of the screen (see CatLess5-4d above, again).

Step 3: Mark the Records to be Transferred/Merged

From the box at the bottom of the screen, mark all records from which you wish to transfer authority (see CatLess5-16, below). Do this by choosing either the **Mark** or the **Mark All** button. In this instance, the **Mark All** buttons was selected, and all of the titles under “Aging-Literary Collections” have been checked.

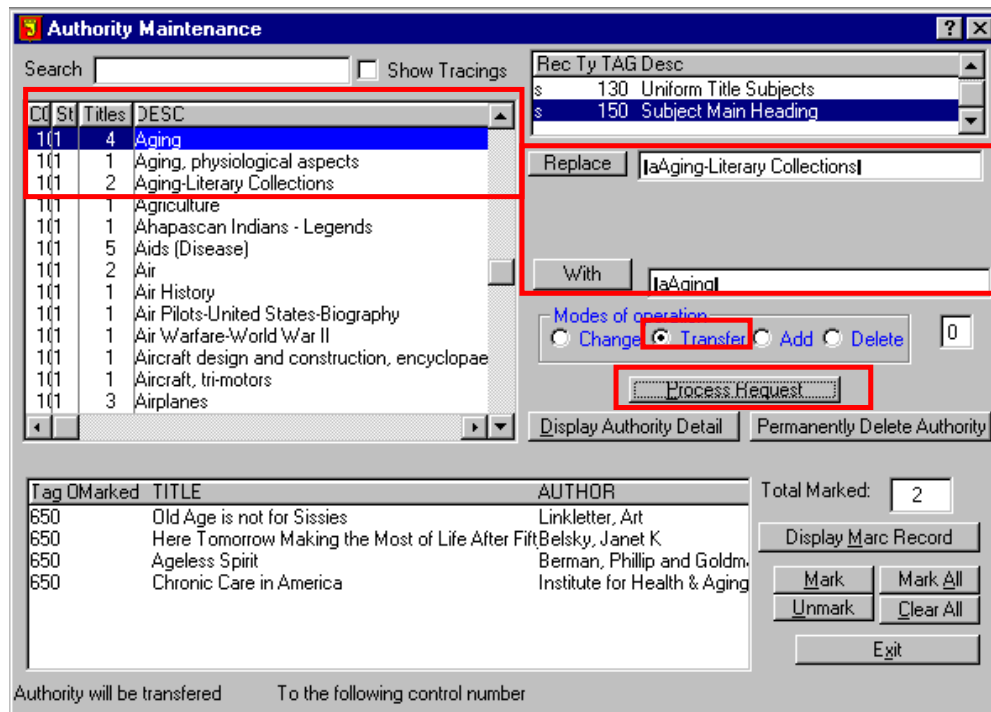


Step 4: Replace Authority

Select the **Replace** button, and the authority entry you wish to replace will appear in the box next to that button. In this case, it is "Aging-Literary Collections" (see CatLess5-17, below).

Step 5: Select "With"

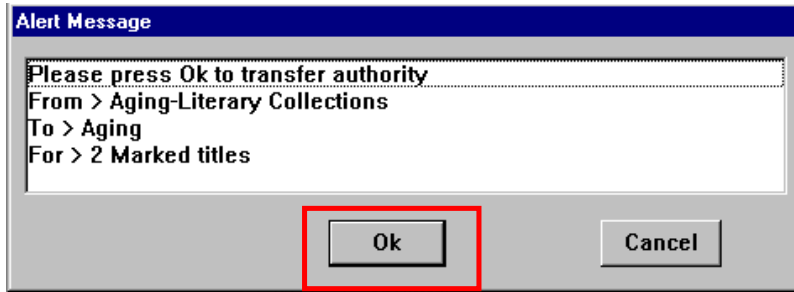
Next, select the authority entry you wish to replace "Aging-Literary Collections" with. In this case, "Aging." is the choice (see CatLess5-17 below, again). Select the **With** button, and "Aging." will automatically appear next to that button.



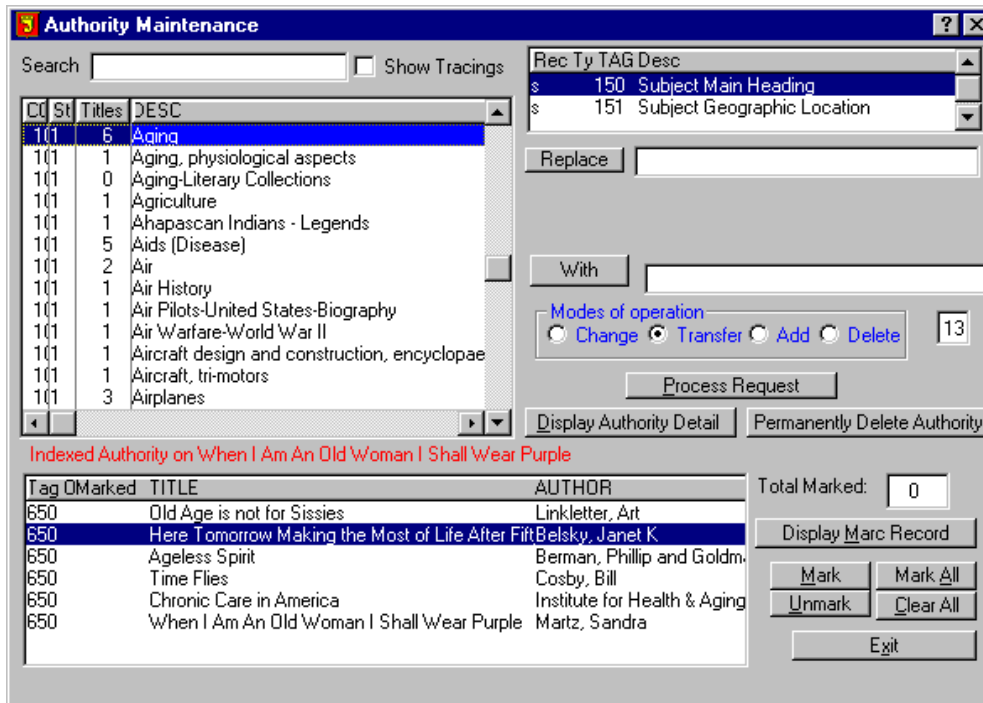
Step 6: Process Request

Select the **Process Request** button to cause the authority "Aging-Literary Collections," to be replaced with "Aging." in all of the previously marked records (see CatLess5-17 above, again).

Once the *Process Request* button has been selected, an **Alert Message** screen appears (see CatLess5-18, below). Select the *Ok* button to complete the process of transferring authority.



Once authority has been transferred, the **Authority Maintenance** screen looks like the one shown below (CatLess5-19). Notice that there are now no titles associated with "Aging-Literary Collections" as indicated by the "0" under the *Titles* column in the box at the top of the screen, and by the absence of titles in the box at the bottom of the screen.



How to Add an Authority Tag to a Set of Catalog Records

Example: A set of MARC records has been assigned the same authority tag, "Baseball". It is necessary to add the subject tag, "Baseball-Hall of Fame" to these same MARC records.

To do so, follow the steps below.

Step 1: Open Authority

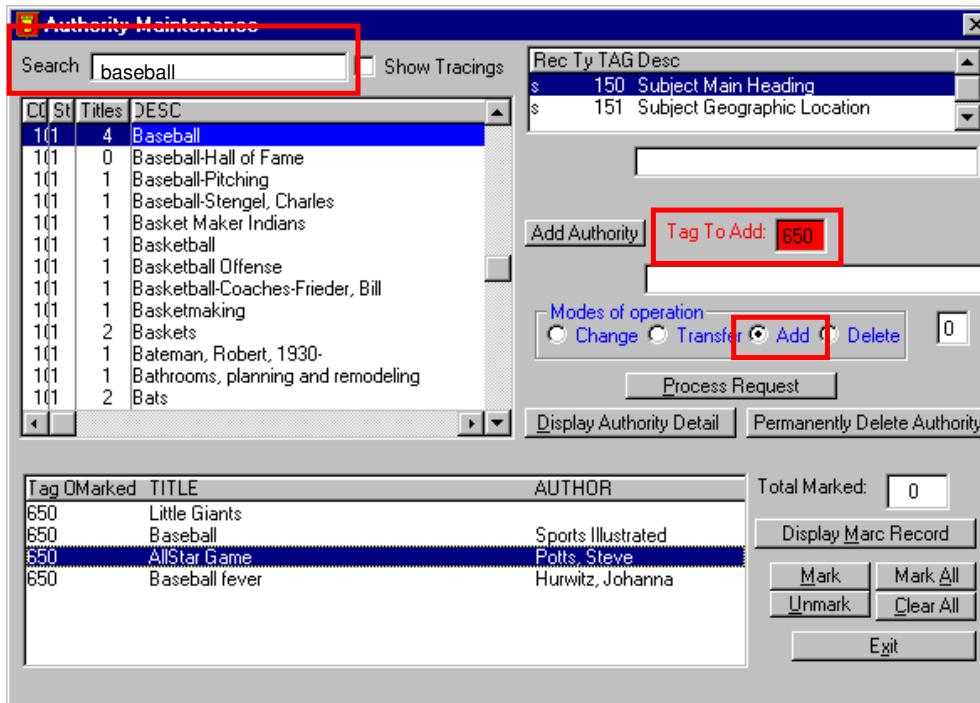
Go to the Authority Maintenance screen, by clicking on the word "Authority" at the top of the **Lib/Net** opening screen (CatLess5-9, below).



Step 2: Conduct a Search

NOTE: Be sure to select the **Add** button so that the system will know to add authority (see CatLess5-3a, below).

Conduct a key word search to find the authority to which you wish to make an addition. In this case, the key word is “baseball” (see CatLess5-20, below).



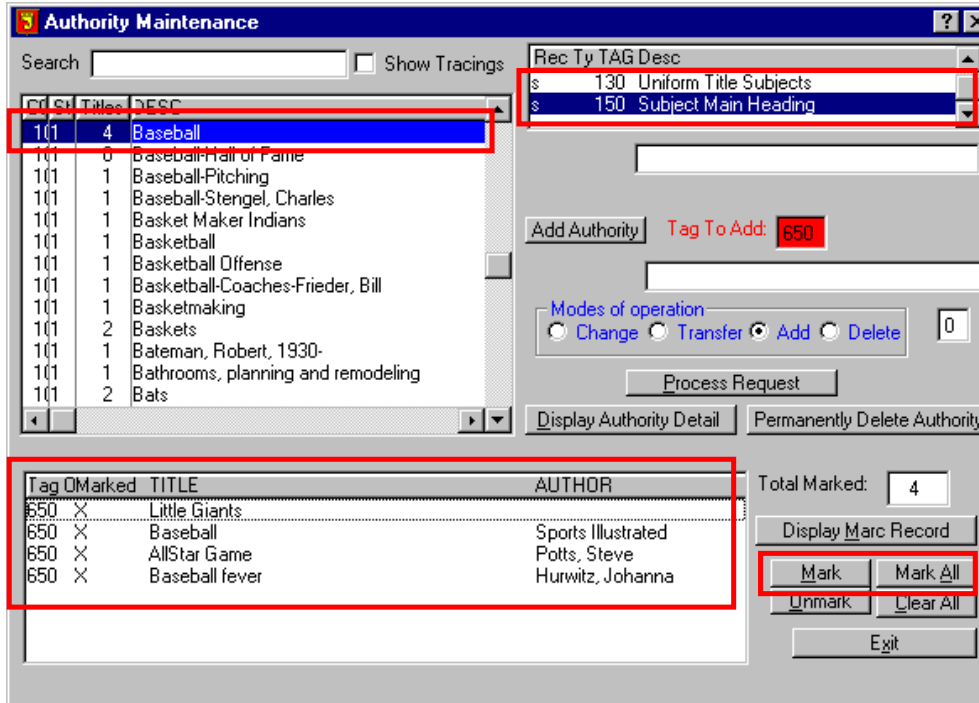
Step 3: Choose a Tag Number

Type the number of the tag that will be added in the red box (see CatLess5-21, below). In this instance, the tag selected is 650 (see CatLess5-20, above).

Step 4: Select Authority

From the right side of the Authority Maintenance screen, select the appropriate tag. In the case of CatLess5-21 below, "150 Subject Main Heading" has been selected. From the left side of the **Authority Maintenance** screen, select the "parent" authority record to which you wish to add authority. In the case of CatLess5-21 below, "Baseball" has been selected.

NOTE: The authority tag to be selected must already exist in the authority list.

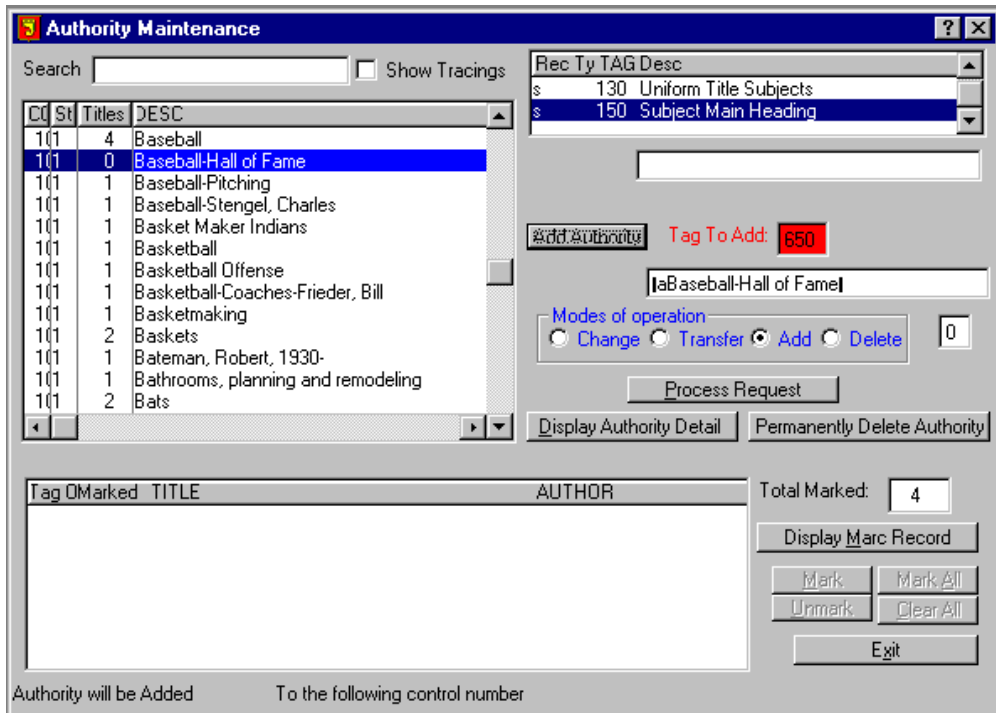


Step 5: Select Associated Titles

Use the **Mark** or **Mark All** button to select one or all of the titles associated with that authority record to which you wish to add authority (see CatLess5-21 above). In this case, all of the titles shown at the bottom of the screen have been selected.

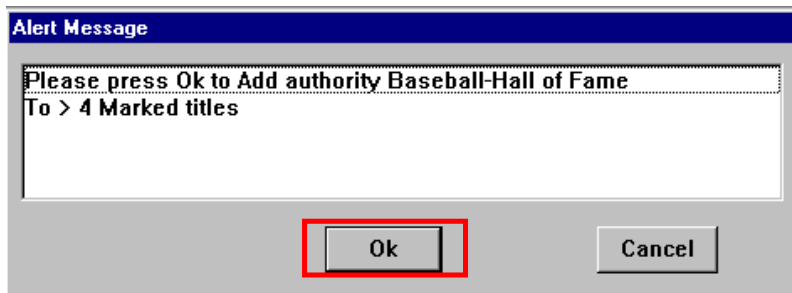
Step 6: Select Authority to Be Added

Now that the titles associated with the authority that you wish to change have been marked, scroll through the list of authority on the **Authority Maintenance** screen to select the “new” authority to be added to those titles. Do this by highlighting the authority entry on the list, and by selecting the **Add Authority** button to the right of the list. In this case, “Baseball-Hall of Fame” has been selected as the authority to be added to the marked titles already associated with the authority, “Baseball” (see CatLess5-22, below).



Step 7: Process Request

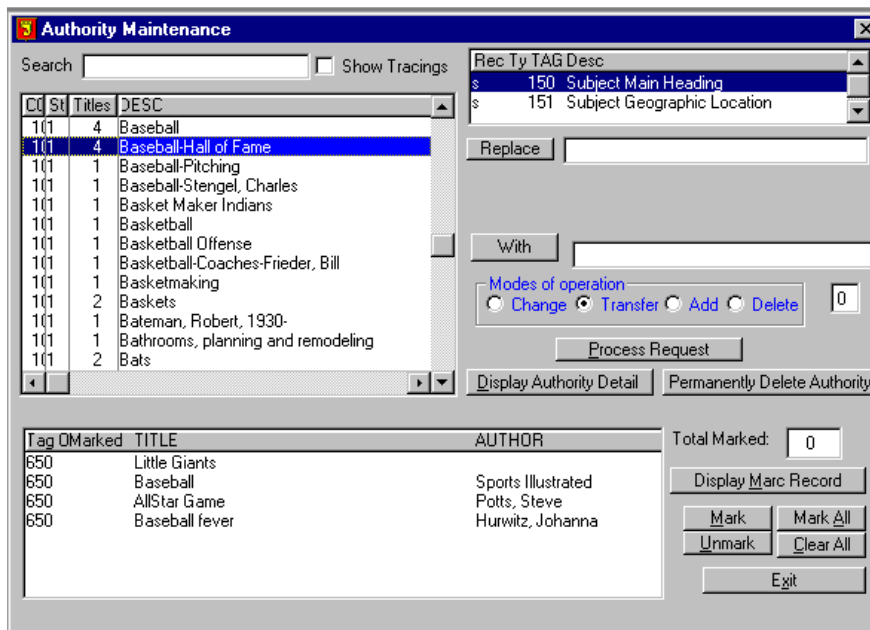
Select the *Process Request* button (refer back to CatLess5-22, above), and an Alert Message box will appear (CatLess5-23, below).



Step 8: Okay the Authority Addition

Select *Ok* (see CatLess5-17c, above) to process the addition of the authority “Baseball-Hall of Fame” as authority for the four selected titles.

Notice that the resulting “Baseball-Hall of Fame” authority record is not linked to the same four titles as the “Baseball” authority record (see CatLess5-24, below). Also notice that the number 4 is next to the authority record “Baseball”, indicating that four titles have that authority associated with them. Previously, that number was 0.



How to Delete Authority

Example: A set of MARC Records was assigned the same authority tag, “Baseball-Hall of Fame” in error. The goal is to delete this subject tag from all of the tagged MARC records.

To accomplish this goal, follow these steps.

Step 1: Open Authority

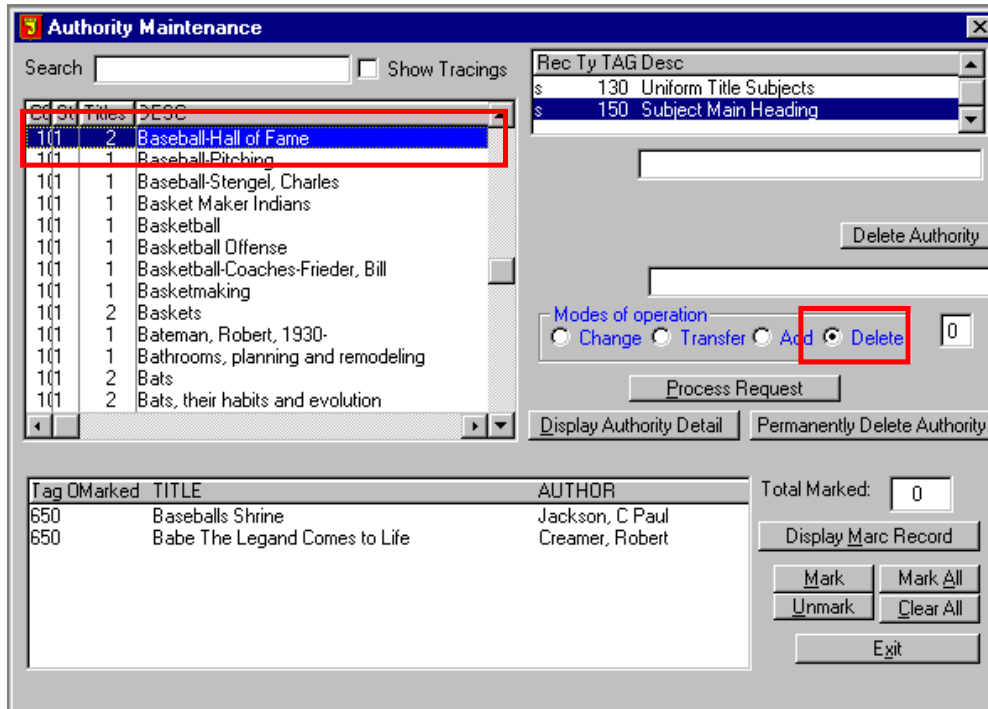
Go to the Authority Maintenance screen, by clicking on the word “Authority” at the top of the **Lib/Net** opening screen (CatLess5-2, below).



Step 2: Conduct a Search

NOTE: Be sure to check the *Add* button so that the system will know to delete authority (see CatLess5-a, below).

Conduct a key word search to find the authority to which you wish to make an addition. In this case, the key word is “baseball” (see CatLess5-25, below).



Step 3: Select Authority Record to Delete

Select an authority record from the list on the left to delete from the MARC records. In this case, it is “Baseball-Hall of Fame” (see CatLess5-25, above).

Step 4: Select the Delete Authority Button

The screenshot shows the 'Authority Maintenance' window. The main list contains the following records:

Ct	St	Titles	DESC
101	4	Baseball	
101	2	Baseball-Hall of Fame	
101	1	Baseball-Pitching	
101	1	Baseball-Stengel, Charles	
101	1	Basket Maker Indians	
101	1	Basketball	
101	1	Basketball Offense	
101	1	Basketball-Coaches-Frieder, Bill	
101	1	Basketmaking	
101	2	Baskets	
101	1	Bateman, Robert, 1930-	
101	1	Bathrooms, planning and remodeling	
101	2	Bats	

The 'Delete Only If Contains text' field is currently blank. The 'Delete Authority' button is highlighted with a red box. The 'Modes of operation' section has radio buttons for Change, Transfer, Add, and Delete (which is selected). The 'Process Request' button is visible. At the bottom, the 'Total Marked' field shows '0'.

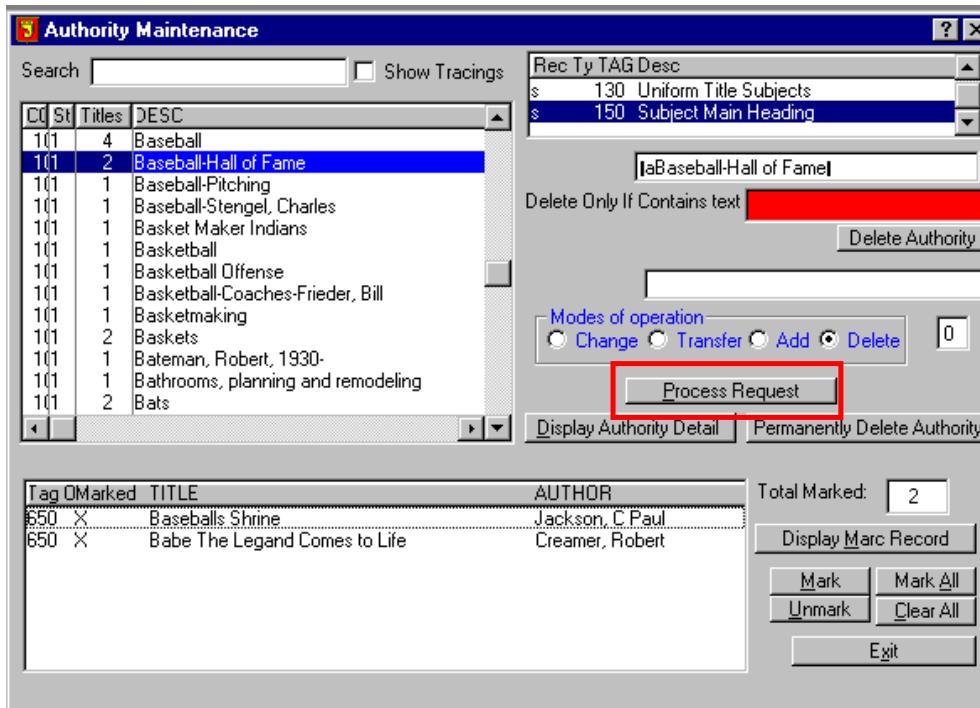
Select the *Delete Authority* button (see CatLess5-25, above), and a red entry field box will appear with the words, “Delete Only If Contains text” in front of it.

Here, a user can enter a string of text to additionally filter the words and to safeguard against deleting tags unnecessarily/accidentally.

For this example, the field has been left blank.

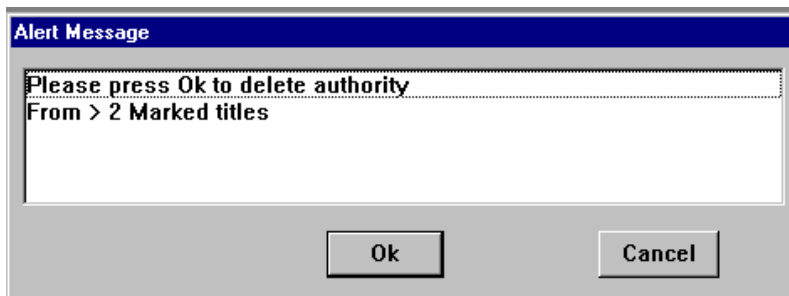
Step 5: Select Records from Which to Delete Authority

Use the buttons *Mark* or *Mark All* to select the records from the box at the bottom of the Authority Maintenance from which the authority “Baseball-Hall of Fame” is to be deleted (see CatLess5-26, below).



Step 6: Process the Request

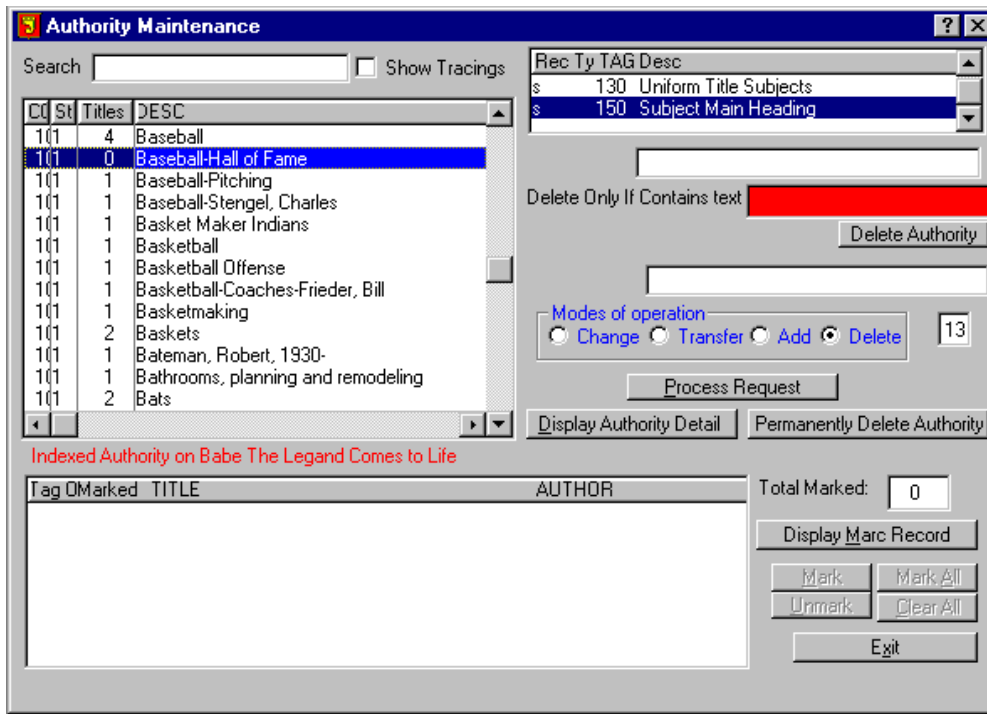
Select the Process Request button (see CatLess5-26, above) and an Alert Message box will appear (CatLess5-27, below).



Step 7: Okay the Authority Deletion

Select the *Okay* button on the **Alert Message** screen to complete the request for deletion.

The resulting screen will look like this (CatLess5-28, below) . . .

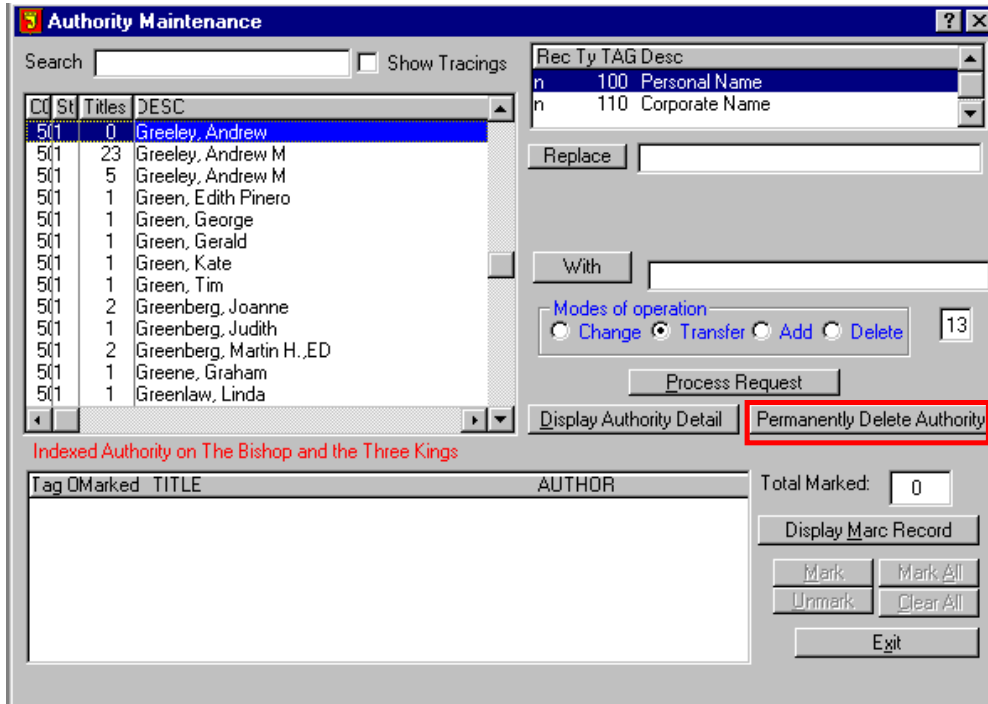


Notice that the number 0 is under the heading “Titles” next to the authority “Baseball Hall of Fame” because there are now no titles in the MARC catalog associated with that authority based on the authority deletion that just occurred.

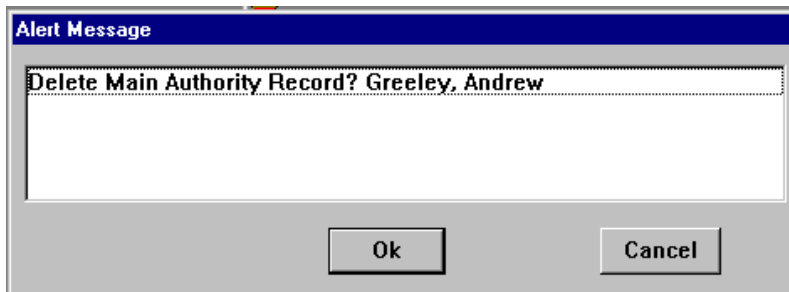
How to Delete Old Authority (if necessary)

NOTE: Deleting old authority is only relevant after a transfer is complete.

Now, if you wish, you can permanently delete the “Greeley, Andrew” authority because there are no records associated with it any longer, as is evident by the “0” under the “Titles” heading. To do this, select the *Permanently Delete Authority* button (see CatLess5-29, below).



A new **Alert Message** screen will appear (CatLess5-30, below). On this screen, select *Ok* to permanently delete the “Greeley, Andrew” authority. That authority will permanently be deleted from the authority list in the system.



Each authority phrase has a number associated with it. It is not so much that a user is replacing the phrase as it is replacing the number.

Remember, though, that authority maintenance is not an exact science – it is an artful practice affected by many outside influences such as local practices, individual librarian's preferences and priorities, and the fact that more often than not, authority is "copied" from other sources.

Viewing Authority

Step 1: Open the Authority Menu

Select the *Authority* menu at the very top of the opening Lib/Net screen (CatLess5-9, below).



Step 2: Search for Authority

Once the Authority is selected, a pull-down menu with a list of the following entries will appear.

- Personal Names (Author)
- Topical Terms (Subject)
- Corporate Names
- Meeting Names
- Name Uniform Title
- Subject Uniform Title
- Geographic Names
- Authority Maintenance

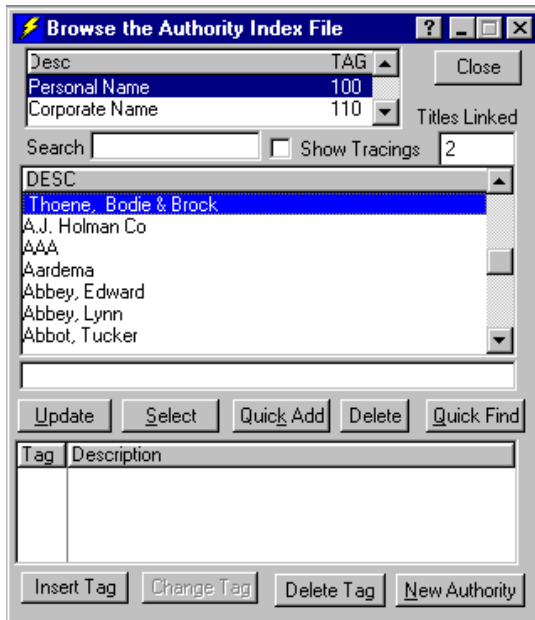
From this list, select the type of "browse" you wish to conduct.

NOTE: All entries except the *Authority Maintenance* entry pertain to **browsing** the authority files. The *Authority Maintenance* entry is used for maintenance only, such as for transferring and changing authority.

Step 2: Open the Browse the Authority Index File Screen

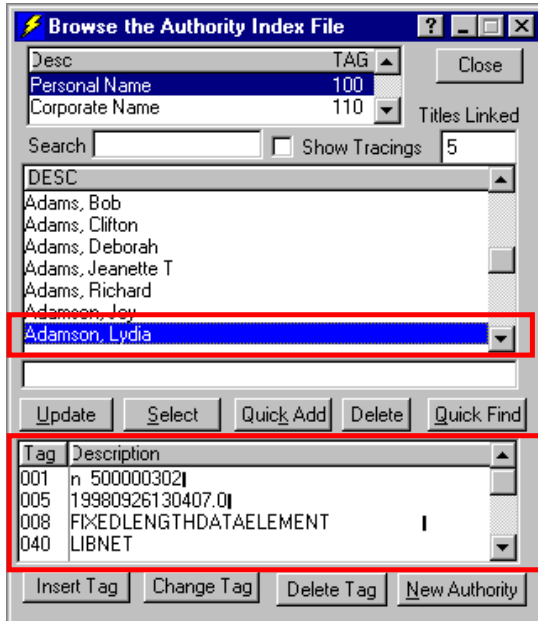
If the type of browse you wish to conduct is through a view that pertains to names, then select *Personal Names (Author)* from the list of *Authority* pull-down menu items.

The **Browse the Authority Index File** screen appears (CatLess5-31, below).



Step 3: Review Authority

Scroll down the list in the *DESC* box at the top of the screen and select a name. In the case of the example below (CatLess5-32), the name Adamson, Lydia has been selected. Click twice with the mouse on that record, and the authority for that record will appear in the bottom box (see CatLess5-32 below, again).



Lesson 6: How to Index the Catalog

Introduction to Indexing

The Catalog Editor database contains indices linked to actual titles of records in that same database. While the catalog is being indexed, the data for the records are still there, but the indices temporarily disappear until new indices and links are rebuilt.

The purpose for indexing is simple. It is a safety measure – insurance that the system is properly indexed and that the catalog's indices continue to be properly linked to records. If the indices are not properly linked, which can sometimes happen because of system malfunctions and computer glitches, the information featured for each catalog record can become unreliable and even corrupt. Because it is difficult for any of us to know what can happen “behind the scenes” in any computer system, and because no computer is one hundred percent fail-safe, it is absolutely necessary to index the catalog on a regular basis.

Indices are comprised of record names, subjects, titles, authority lists, etc. It is recommended that indexing be conducted at least every month or two. Of course, ultimately the decision about how often to index is a judgment call on the part of each library because each library's needs are different. Keep in mind that indexing a library's on-line database can be a large undertaking, depending on the size of the library and its database, and depending on the speed of the server. Larger libraries could take as long as one or two days to index their catalogs. It is wise for an average-to-small library to set aside at least six to eight hours to complete the indexing process. Although it can take time, remember that indexing is a way to “clean the bugs” from any system, and all library catalogs on line will function better for it.

Preparing to Index

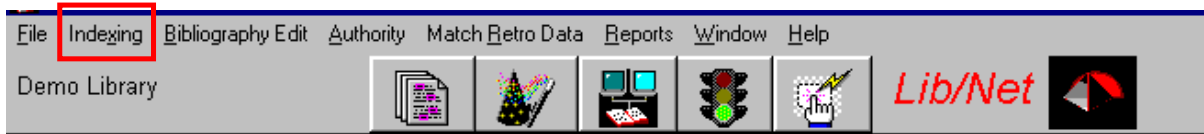
Before going on to learn the indexing steps, consider the following tips and facts.

- Be sure to back up the system before indexing.
- Every four to six weeks, as a preventative measure and to clean out the system, run the indexing function.
- No cataloging is possible during any indexing session.
- Before indexing, be sure to notify ALL USERS that they must exit the Catalog Editor and OPAC.
- Circulation can run while the system is being indexed, but this could prolong the entire indexing process.
- Indexing could take from six to eight hours, or even from one to two days.
- DO NOT use your computer for anything else while completing the six indexing steps – do not check e-mail, word process, print, etc. The indexing function requires the full attention of the computer at all times.

NOTE: At this point, before proceeding with indexing, be sure that the system is completely backed up.

Steps for Indexing

At the opening Catalog Editor program screen, the Indexing menu (see CatLess6-1, below) will be used at the start of each indexing step.



This pull-down menu features the following options, which are the steps to take when indexing the catalog.

1. Pre-process Indices
2. Initialize Database for Reindexing
3. Index KeyWords and Titles
4. Index Authority
5. Index Authority Links
6. Recalc Authority Links (occurrences)

Step 1: Pre-process Indices

Select *Indexing* at the main **Catalog Editor** screen, then select *1. Pre-process Indices*. The **Create Title Cache** screen will appear (see CatLess6-1, below). This is the housecleaning step that can be completed at any time.

Create Title Cache

Total Records: Timer Loop Flag

Records Read: Leaders Changed:

Records Written:

Title Display:

LHMDEL: NMT S DELETED:

LHMADD: LHMSHEETADD:

Select the *OK* button (see CatLess 6-1 again, above).

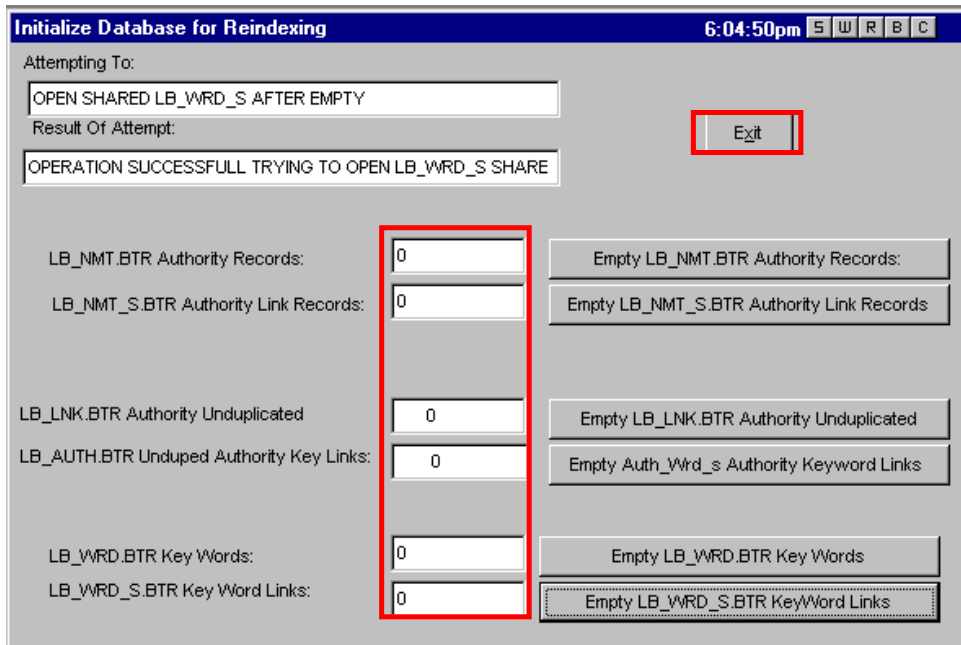
Step 2. Initialize Database for Reindexing

Select **Indexing** menu again at the main **Catalog Editor** screen, then select menu item **2. Initialize Database for Reindexing**. The **Initialize Database for Reindexing** screen will appear (see CatLess6-2, below).

NOTE: Beginning this next step will be impossible if anyone is still using the system other than you. Be sure to inform all users that they must completely exit the OPAC system. Only one person can index the database at a time. This process is touchy and sometimes the server must be brought down to do it. During this step, if one or all of the tables will not empty out, then be sure that everyone is out of the system. For technical assistance, contact NuGen Systems, Inc.

Initialize Database for Reindexing		
Attempting To:	<input type="text"/>	
Result Of Attempt:	<input type="text"/>	<input type="button" value="Exit"/>
LB_NMT.BTR Authority Records:	<input type="text" value="27,244"/>	<input type="button" value="Empty LB_NMT.BTR Authority Records:"/>
LB_NMT_S.BTR Authority Link Records:	<input type="text" value="38,726"/>	<input type="button" value="Empty LB_NMT_S.BTR Authority Link Records"/>
LB_LNK.BTR Authority Unduplicated	<input type="text" value="0"/>	<input type="button" value="Empty LB_LNK.BTR Authority Unduplicated"/>
LB_AUTH.BTR Unduped Authority Key Links:	<input type="text" value="0"/>	<input type="button" value="Empty Auth_Wrd_s Authority Keyword Links"/>
LB_WRD.BTR Key Words:	<input type="text" value="37,845"/>	<input type="button" value="Empty LB_WRD.BTR Key Words"/>
LB_WRD_S.BTR Key Word Links:	<input type="text" value="139,438"/>	<input type="button" value="Empty LB_WRD_S.BTR KeyWord Links"/>

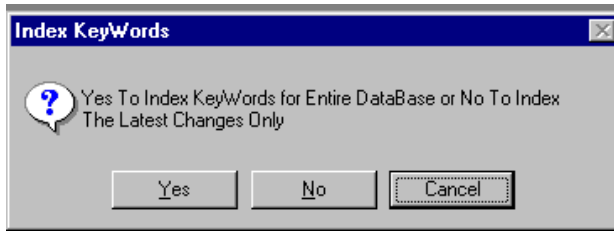
Empty all six index tables by selecting each of the six **Empty . . .** buttons to the right of each index table (see CatLess6-2, above). Once this function is finished, all of the records on the left will have the number 0 (zero) in them if they have truly been emptied. (see CatLess6-3, on the following page).



Select the *Exit* button on the **Initialize Database for Reindexing** screen (see CatLess6-3, above) and go on to Step 3.

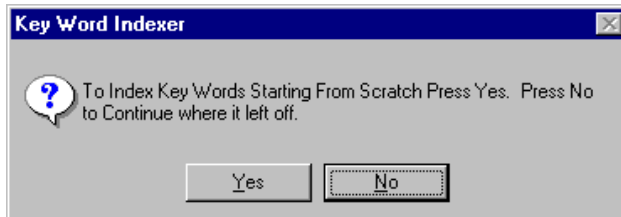
Step 3: Index Key Words

Select **Indexing** again at the main Catalog Editor screen, then select **3. Index Key Words**. The **Index KeyWords** screen will appear.



Select **Yes** to index key words for the entire database, or **No** to index the latest changes only (see CatLess6-4, above).

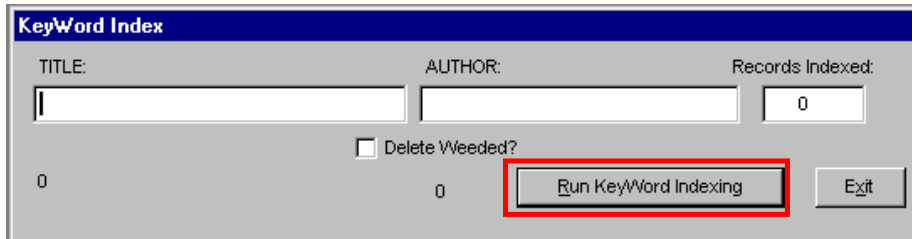
If **Yes** has been selected, the **Key Word Indexer** screen appears (CatLess6-5, below).



Select the **Yes** button on the **Key Word Indexer** screen (see CatLess6-5, above).

NOTE: Although it is highly inadvisable, it is possible to stop the key word indexing process by selecting the "Esc" (escape) key on your keyboard. If you were interrupted during a key word indexing session and had escaped from that function, the **No** button (see CatLess6-5, above) can be pressed to resume indexing the key words where you left off.

After selecting the *Yes* button on the Key Word Indexer screen (above), the **KeyWord Index** screen appears (CatLess6-6, below).



The screenshot shows a window titled "KeyWord Index". It has three input fields: "TITLE:" (empty), "AUTHOR:" (empty), and "Records Indexed:" (containing "0"). Below these is a checkbox labeled "Delete Weeded?" which is unchecked. At the bottom, there are two buttons: "Run KeyWord Indexing" (highlighted with a red rectangle) and "Exit".

At the **KeyWord Index** screen, select the *Run KeyWord Indexing* button (see CatLess6-6, above).

Step 4: Index Authority

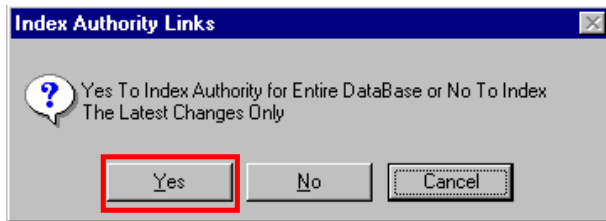
Select *Indexing* again at the main **Catalog Editor** screen, then select **4. Index Authority**. The **Index Authority Window** screen (CatLess6-7, below) will appear.

Dedu	Dedu : Desc	Dedu : Controls

Select the *Run Job* button (see CatLess6-7, above). During this step, the system will rebuild the authority pick lists. At this point, the pick lists will be built, but the occurrences will be zero (0).

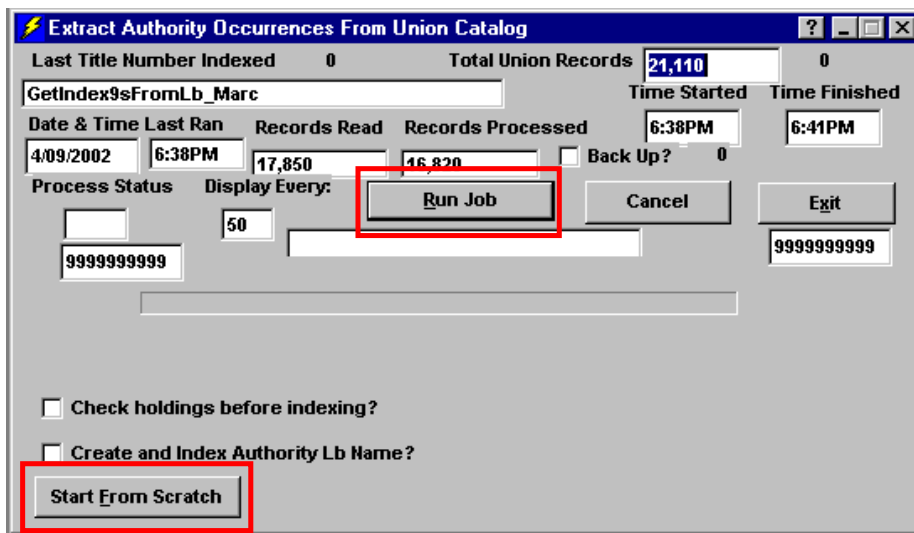
Step 5: Index Authority Links

Select **5. Index Authority Links** from the Indexing menu at the main **Catalog Editor** screen, and the **Index Authority Links** screen will appear (CatLess6-8, below).



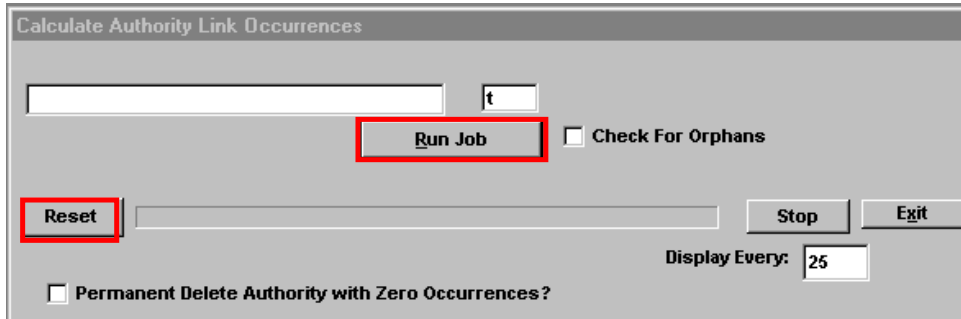
Select the **Yes** button (CatLess6-8, above), and the **Extract Authority Occurrences From Union Catalog** screen will appear (CatLess6-9, below).

Click on **Start from Scratch** button, then the **Run Job** button (see CatLess6-10, below). This step extracts authority from the catalog, then builds a new file – one that will point to the titles in the database.



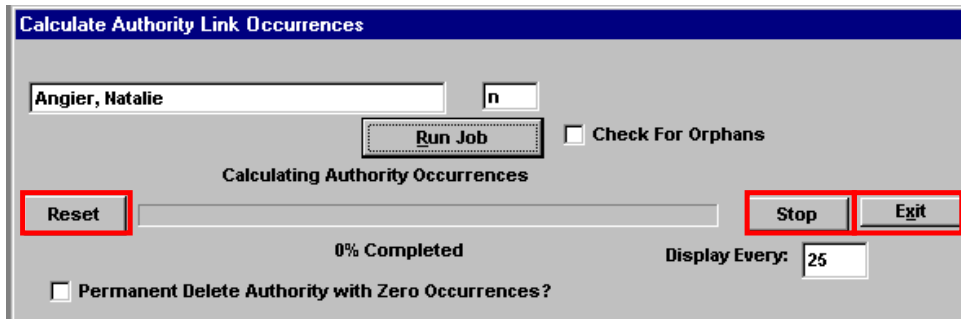
Step 6: Recalc Authority Links

Next, select **6. Recalc Authority Links** (occurrences) from the *Indexing* menu at the main **Catalog Editor** screen. This will bring up the **Calculate Authority Link Occurrences** screen (CatLess6-11, below).



As a safety measure, when starting the job from scratch, select the *Reset* button, then click on the *Run Job* button (see CatLess6-11 again, above).

See CatLess6-12, below, for an example of a job in process.



NOTE: The job can be stopped or exited, then resumed or reset at any time (see the buttons highlighted on CatLess6-12, above).

Lesson 7: How To Deactivate or “Weed” Items

Introduction

Item deactivation or “weeding” is performed for a variety of reasons and is an ongoing effort. There are two types of weeding – circulation-related weeding and “routine” weeding. Circulation-related item weeding is performed using the Lib/Net “Circulation” program. Routine item weeding is performed using the Lib/Net Catalog Editor program. This lesson addresses routine item deactivation through the use of the Catedit module.

Examples of Routine Weeding

Some of the reasons to routinely weed items include:

- ongoing replacement of old, worn out books
- removal of items out of circulation for a long period of time
- removal of missing or lost items

Examples of Weeding for Circulation Purposes

Items are only deactivated for circulation reasons when:

- they are not returned from patron checkout
- items have been lost and their replacement paid for by patrons

Steps to Take When Weeding

Item deactivation involves both the item (copy) records and the catalog (MARC) record. Copies can be deactivated and removed from a catalog record, and the catalog record itself can be deleted. A catalog record will not be delete-able if the item (copy) records are attached. First, item records would have to be deactivated and removed.

Step 1

Select the *Edit Marc Bibliography* button (see CatLess7-1 below) at the opening **Lib/Net** screen to access the “browser” or the **Browse the Union Marc by Title, Author, Isbn** screen.



Step 2

Type the title or the author's name in the "Search" box (see CatLess 7-2, below), or scan the item's bar code. (The title *Dumbo* has been typed into the *Search* bar on the screen shown below.) Then, hit the **Tab** key on the computer keyboard to activate the search for *Dumbo* in the database.

The screenshot shows a software window titled "Browse the Union Marc by Title, Author, Isbn". At the top, there is a search bar with "Dumbo" entered. Below the search bar is a table of search results. The table has the following columns: Title, Author, Isbn, Astamp, Publis, Phys Desc, St, Editdate, Editname, Title #, and TITLE. The first row is highlighted in blue and contains the following data: Title: "The 1", Author: "Mann, Carol", Isbn: "0681414553", Astamp: "1992", Publis: "Hardcover", St: "Q", Editdate: "11/26/01", Editname: "STAUPDA", Title #: "7531", TITLE: "1".

Title	Author	Isbn	Astamp	Publis	Phys Desc	St	Editdate	Editname	Title #	TITLE
The 1	Mann, Carol	0681414553	1992	Hardcover		Q	11/26/01	STAUPDA	7531	1
1 2 3	Snapshot	1564585344	1994	Boardbook		Q	3/01/00	STAFF	20904	1 2 3
10 Lb. Penalty	Francis, Dick	0399143475	1997	3hrs		Q	9/26/98	STAUPDA	354	10 Lb Penalty
10 Lb. Penalty	Francis, Dick	0399143025	1997	Hardback		Q	9/26/98	STAUPDA	3390	10 Lb Penalty
10 Minute Guide to Motivating	Cook, Marshall	002861738x	1997	Trade		Q	6/07/99	STAFF	18885	10 Minute Gu
The 100 Best Small Art Towns	Villani, John	1-56261-275	1996	trade		Q	9/26/98	STAUPDA	7319	100 Best Smc
100 Years in Leelanau	Littell, Edmund		1965	Trade		Q	10/14/99	STAFF	20034	100 Years in
100 Years in Leelanau	Littell, Edmund		1965	Trade		Q	/ /		9447	100 Years in
100 Years in Leelanau	Littell, Edmund		1965	Trade		Q	/ /		12322	100 Years in
100 Years in Leelanau	Littell, Edmund		1965	Trade		Q	/ /		12323	100 Years in
100 Years in Leelanau	Littell, Edmund		1965	Trade		Q	/ /		12328	100 Years in
100+ Super Pig Jokes, Puns, a	Parenteau, Shirley	0590416561	1981	Paperback		Q	11/11/99	STAFF	20243	100+ Super F
1000 Facts About Space	Beasant, Pam	1856978117	1992	Trade		Q	3/20/00	STAFF	21030	1000 Facts A
1,000 Lowfat Recipes	Golson, Terry Blonder	0028603540	1997	Hardcover		Q	3/31/99	STAFF	17893	1000 Lowfat
10,000 Beautiful House Plants	Kramer, Jack	69-12554	1969	Hardcover		Q	9/26/98	STAUPDA	5715	10000 Beauti
10,000 Garden Questions, Vol	Dietz, Marjorie J	0-385-00475	1974	Hardcover		Q	9/26/98	STAUPDA	5708	10000 Garden
10,000 Garden Questions, Vol.	Dietz, Marjorie	0-385-00475	1974	Hardcover		Q	9/26/98	STAUPDA	5707	10000 Garde
1001 Cookie Recipes	Gillespie, Gregg R	1884822355	1995	Hardback		Q	9/26/98	STAUPDA	6702	1001 Cookie
1001 Things Everyone Over 55	Schrader, Constance	0385482248	1999	Trade		Q	6/05/99	STAFF	18867	1001 Things
101 Best Resumes	Block, Jay A & Betrus, M	00-07-032893	1997	softcover		Q	9/26/98	STAUPDA	7097	101 Best Res
101 Dalmations	Korman, Justine	0307001164	1988	Hardcover		E	7/19/01	111UPDA	15653	101 Dalmatio
101 Essential Tips Caring for Y	Alderton, David	078941077x	1996	Trade		Q	3/30/00	STAFF	21130	101 Essential
101 Games For Boys and Girls	Baltzell, Maude	0590418114	1989	Hardcover		Q	9/26/98	STAUPDA	5904	101 Games F
101 Ghost Jokes	Eisenberg, Lisa		1988	Paperback		Q	/ /		12262	101 Ghost Jo
101 Grand Adventures in Travel	Rusnack, Richard	0932212956	1997	Paperback		Q	3/04/99	STAFF	17436	101 Grand Av
101 Patchwork Patterns	McKim, Ruby	0486207730	1962	Trade		Q	9/26/98	STAUPDA	7750	101 Patchwo
101 physics tricks : fun experim	Cash, Terry	0806987863	1992	104 p. :col. ill. ;29 cm.		A	5/09/00	PAT	21330	101 physics t
101 Science Surprises	Richards, Roy	8069-8822-3	1992	Hardcover		Q	3/17/00	STAFF	21008	101 Science
101 Things For Kids To Do		0394889053	1987	60 min		Q	9/26/98	STAUPDA	89	101 Things F

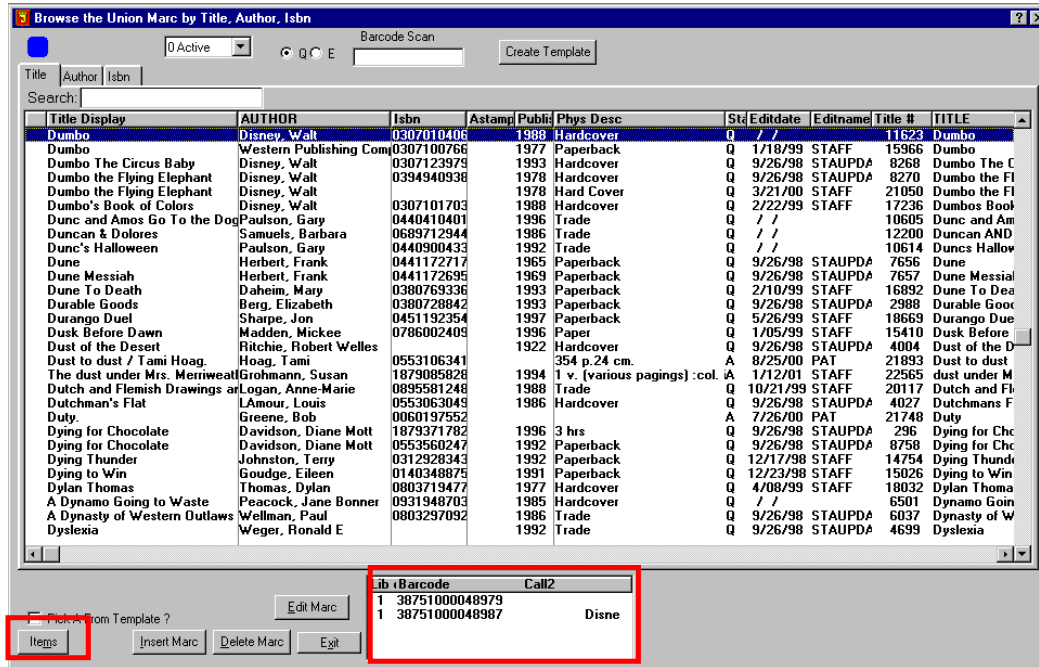
At the bottom of the window, there is a section for "Lib + Barcode" and "Call2" with the following data: Lib + Barcode: 1 38751000036768, Call2: 796.352 Mann. Below this are buttons for "Pick A From Template?", "Edit Marc", "Items", "Insert Marc", "Delete Marc", and "Exit".

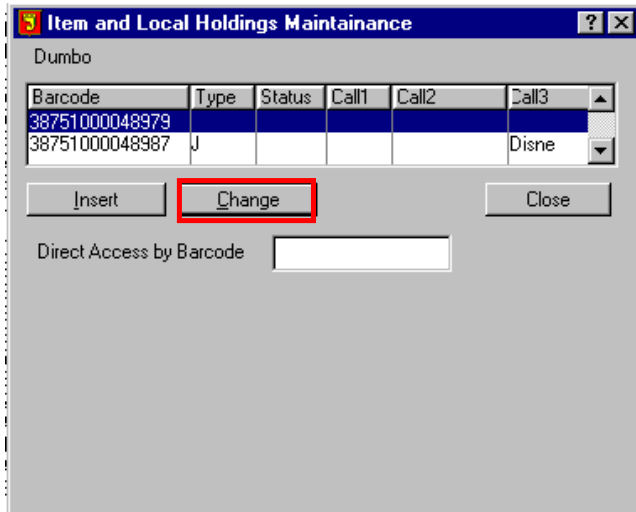
Step 3

The Catalog Editor browser brings up a screen with the closest entries for Dumbo (see CatLess7-3, below). Highlight the title in the browse list that you wish to weed.

NOTE: Notice that the box labeled Lib Barcode Call2 displays the items associated with a selected title (see CatLess 7-3, below again).

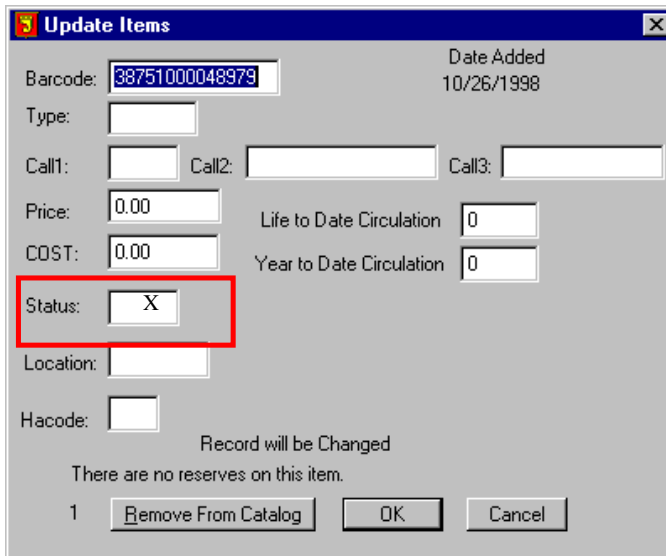
Select the **Items** button (bottom left of **CatEdit** screen, see CatLess7-3 again, below) to display a list of associated copies presented on the **Item and Local Holdings Maintenance** screen (CatLess7-4, below).





Step 4

Highlight the item to be deactivated, then select the *Change* button (see CatLess7-4, above). The “item master record form” or **Update Items** screen will appear (CatLess7-5, below).

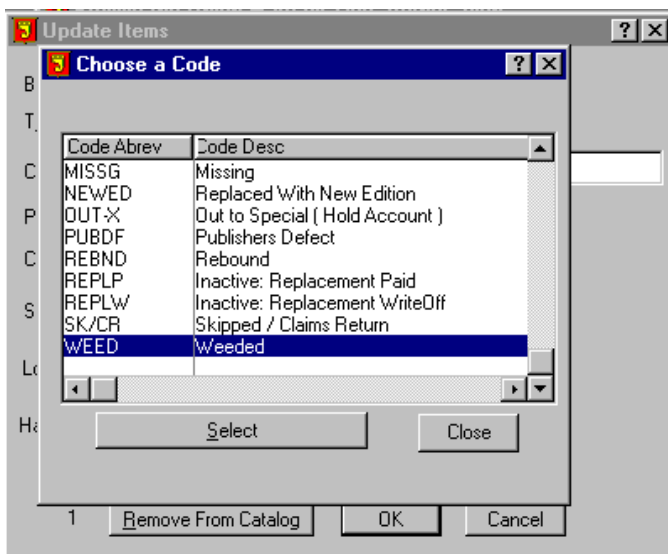


Step 5

To deactivate or delete an item, enter a *Deactivation reason code* in the *Status* field from the list provided in the system:

MISSG	Missing
NEWED	Replaced With New Edition
OUT-X	Out to Special (Hold Account)
PUBDF	Publishers Defect
REBND	Rebound
REPLP	Inactive: Replacement Paid
REPLW	Inactive: Replacement WriteOff
SK/CR	Skipped/Claims Return
WEED	Weeded

NOTE: If you do not know the available codes, type "X" into the *Status* field (refer back to CatLess7-5, above) and press the "Tab" key to bring up the **Choose Code** screen (see CatLess7-6, below). This screen features a list of available codes from which a user can choose.



Step 6

After typing in or highlighting the appropriate code (in the example above, the code is “WEED”); refer back to CatLess7-6, above) from the list provided, choose the *Select* button to select the code. This returns you to the **Update Items** form again.

Step 7

Back on the **Update Items** form, click on the *Remove from Catalog* button (CatLess7-7, below). The system will prompt you to verify this deletion in the form of a **Delete Item** screen by asking for a “Yes” or “Cancel” answer (CatLess 7-8, below). At this screen, select *Yes* to complete the deletion process.

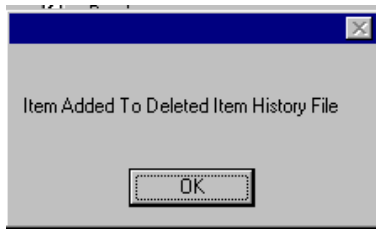
The image shows two overlapping dialog boxes from a software application. The top dialog box is titled "Update Items" and contains the following fields and information:

- Barcode: 38751000048979
- Date Added: 10/26/1998
- Type: [Empty field]
- Call1: [Empty field] Call2: [Empty field] Call3: [Empty field]
- Price: 0.00
- Life to Date Circulation: 0
- COST: 0.00
- Year to Date Circulation: 0
- Status: WEED (highlighted with a red box) Weeded
- Location: [Empty field]
- Hacode: [Empty field]

Below the fields, it says "Record will be Changed" and "There are no reserves on this item." At the bottom, there are three buttons: "Remove From Catalog" (highlighted with a red box), "OK", and "Cancel".

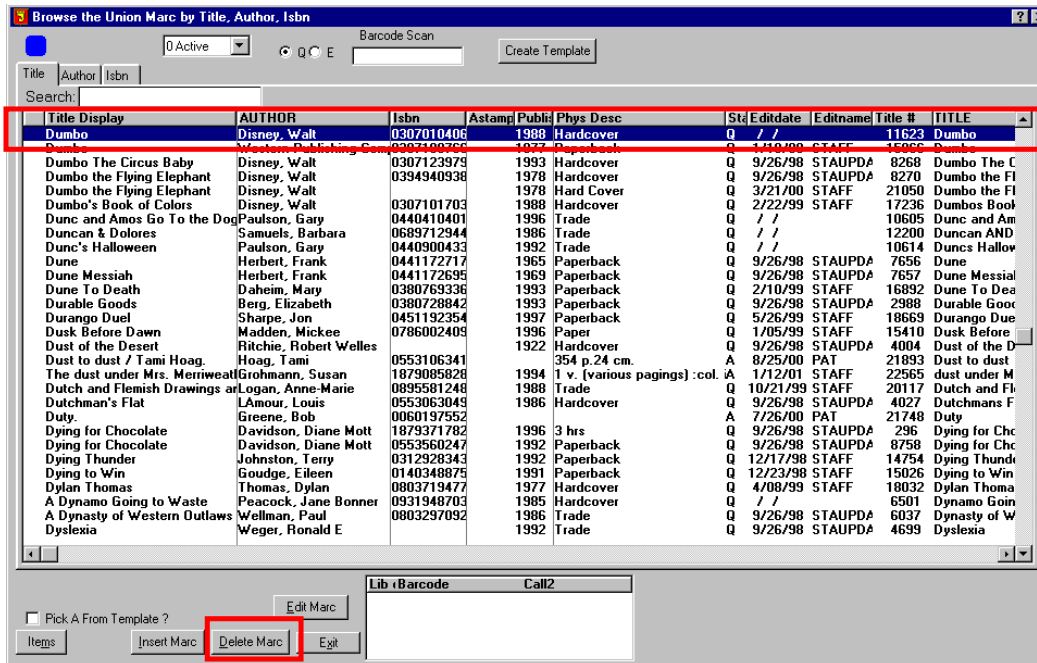
The bottom dialog box is titled "Delete Item" and contains a question mark icon and the text "Yes To Deactivate / Delete Item". It has two buttons: "Yes" and "Cancel".

A confirmation box will appear to verify that the item has been added to the deleted item history file (CatLess7-9, below). Select **OK** to continue.



At this point, the item has been deleted from the **0 Active** field and added to the deleted items file. All deleted items are saved in a separate file for future reference.

Once all of the associated items have been removed from the catalog (MARC) records, the actual catalog record can also be deleted from the active records. At the **Title Browse** list, highlight the title record to be deleted (see CatLess7-10, below) and select **Delete Marc**.



Now, the catalog (MARC) has been changed from *Active* to *Deleted* status, and will no longer appear with the active catalog records. To view deleted catalog records (but not their associated items), select **2 Weeded** from the pull-down selection box at the top of the **Browse the Union Marc by Title, Author, Isbn** screen, and a new **Browse the Union Marc by Title, Author, Isbn** screen showing weeded records will appear (CatLess7-11, below).

