Fall 2012 Evergreen Indiana cataloging roundtable

FAQs

This power point presentation will be on the ISL EI website.

Why do I need to edit the FF?

The fixed fields in Evergreen are important because they affect searching and display in the catalog.

When adding or editing records, check the fixed fields to make sure they are correct.

Searchable fixed fields include: Type, LitF, Audn, Form, Lang.

Editing the FF

- Type: This is coded depending on the type of material cataloged. The icons in the OPAC are based on this code.

- LitF : Fiction is 1, non-fiction is 0 (There are also more specific codes for poetry, essays, etc., but we recommend you use the more general ones.)

- Audn: e for Adult, d for adolescent, g for general, j for juvenile (there are also more specific codes for juvenile age groups)

- Form: d for large print, s for electronic. There are also other formats that should be coded as well.

- Lang: eng, spa, ger for examples

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Editing the FF

Three fixed fields you can check before opening the book

- The Conf, Fest, and Desc fixed fields should always be coded but are often left blank. Try to get in the habit of checking these fields before you even open the book you're cataloging.

- The Conf and Fest fixed fields are always coded 0 (zero) unless you just happen to be cataloging a conference publication or a festschrift (and when was the last time you did one of those?)

- The Desc fixed field is either an 'a' or an 'i'. Code it an 'a' if the record is an AACR2 record and an 'i' if it's an RDA records (the ones with the 336, 337, and 338 fields and all the abbreviations spelled out).

- So as soon as you bring up a bibliographic record to edit or import, check these fields:

- Conf = 0

- Fest = 0

- Desc = a unless it's an RDA record, then code it 'i'

Editing the FF

Adding codes to the ff grid has become trickier since the 2.1 upgrade.

When adding codes, we must take into consideration the number of spaces available in the cell. For example, the Ills cell can take up to four illustration codes. Anytime you add a code to this cell you must use a combination of codes and spaces that add up to four. Now your codes will save as you intended.

 examples:

ab<space><space>   or   b<space><space><space>

Remember, you can watch the 008 field and see your codes appear. That's your clue that it's going to save correctly.

For additional FF info, see the Spring 2010 Roundtable presentation on the Evergreen Indiana Staff Training Documents page.

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006 and 007 fields

- Why do extra or incorrect item types sometimes display in the physical description in the OPAC item summary?

- Usually this is because there is an incorrect or extra 006 or 007 field.

- The 007 fields provide additional information about the item that can't be coded into the 008 field. This information can be very valuable, for instance, when coded correctly the 007 allows the system to distinguish between DVDs, videocassettes, and Blu-ray discs.

- The 006 allows you to code information about accompanying materials.

- The 006 and 007 are repeatable, whereas the 008 field is not.

006 and 007 fields

- If the 006 or 007 doesn't apply to the materials cataloged in the record, you can delete it using the flat text editor.

- If an 006 or 007 is needed for the record, but the ones in the record are inaccurate, you can edit them.

- Go here for information about the 006:

  http://www.oclc.org/bibformats/en/fixedfield/006.shtm

  And here for information on the 007:

  http://www.oclc.org/bibformats/en/0xx/default.shtm

Be sure to pay attention to these fields when creating original records. For instance, the Kit template includes two 007 fields which need to be edited or deleted as appropriate for your kit.

Fields to delete

Fields that commonly need to be deleted include:

016 (National Bibliographic Agency control number)

020 (eBook ISBNs)

$c (price)

029 (other system control number)

263 (projected publication date)

510 (citation/references notes)

590 (local notes) Information stored in the 590 fields should be moved to copy notes.

690 ((local subject headings)

9xx (**Except** 901, 994 and some 949)

The complete list of MARC fields to be deleted in on pgs. 2.6-2.8 of the EI Cataloging Procedures Guide.

Fields NOT to delete

Do not delete:

   00x (physical characteristics, i.e. 007, 008)

   901 (local data elements)

   994

   some 949s (local processing information)

If it looks like a government document, don't delete

949 __ $hSUDOC

949 __ $hSUDOCC or SUDOCF

949 __$hONLINE

Bottom line: if you don't know it, don't delete it!

Why do we use 01, 02, etc. in the 8XX field?

For numbers 1-9 in a series, add a 0 before the number so the computer will put the parts of the series from 1-9 ahead of the 10th item of the series.

Add only the numbers as they appear on the item without any added information such as vol., bk., no., or # (number sign)

490 1_ The Baby-sitters Club ; $v #11.
800 1_ Martin, Ann A., $d 1955- $t Baby-sitters Club ; $v 11.

490 1_ The 39 clues ;$v bk. 9
830 _0 39 clues ;$v 09.

How can I submit a helpdesk ticket when Evergreen Indiana is down?

If your internet connection is still working,

http://help.evergreen.lib.in.us/helpspot/index.php
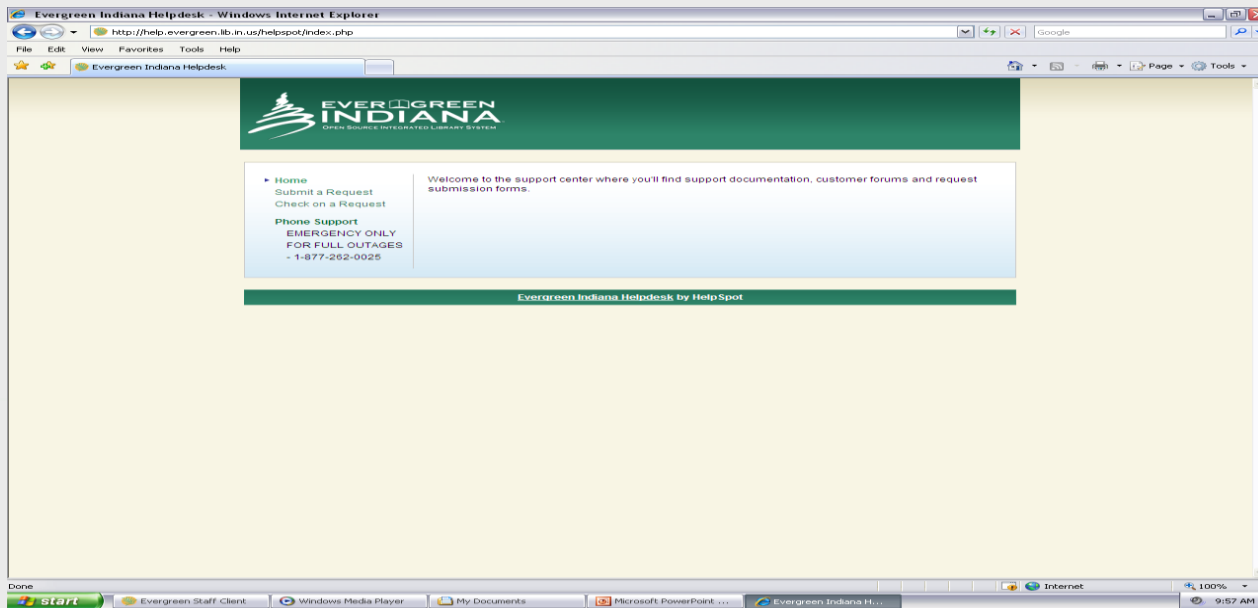
Expired login credentials?

If experience a message indicating this, do the following:

1. Put in a helpdesk ticket because this indicates that there is a security issue that others may be experiencing as well.
2. Check the listserv to see if there are any emails from the Evergreen helpdesk.
3. Run in offline mode until you receive word from the Evergreen helpdesk that the security certificate has been installed properly.
4. Close the staff client and re-open it to be sure that your staff client settings are up-to-date.

Expired login credentials

Age protection

New items cataloged are only protected from holds by other libraries IF age protection has been set on the copy editor screen.

Age protection is not automatic when new holdings are added.

To take advantage of age protection when adding a holding to your collection, select the 6 month protection from the "Age-based Hold Protection" pull-down menu in the third column of the Copy Editor screen. Click "apply", then click "Create Copies".

Of course, the easiest way to age-protect new items is to create a set of templates that have the age protection selected. Information about creating templates can be found in Chapter 6 of the Evergreen Indiana Cataloging Training Manual. How to change existing templates is explained on page 6.12.

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EI Magazine Policy

- Due to a glitch with the Evergreen software which will not allow more than 2000 item holdings to attach to a MARC record, the Evergreen Indiana Cataloging Committee has decided to allow duplicate serial records for some magazine titles.

- The Evergreen Indiana Cataloging Committee advises that each library look at the libraries attached to the various records for these titles and think about attaching your holdings to the MARC record to which other libraries in your part of the state are also attached. This would lead to a region grouping of libraries on each magazine's duplicate MARC records.

- Until there is a permanent fix to this solution, please do consult the cataloging committee before merging any serial records.

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What can I do during a freeze?

A modified catalog freeze will be in place from an announced date/time to a date/time, or, until an announcement on the listserves proclaims the freeze has ended.

What can I do during a freeze?

Do:

Attach holdings and edit holdings.

Do not:

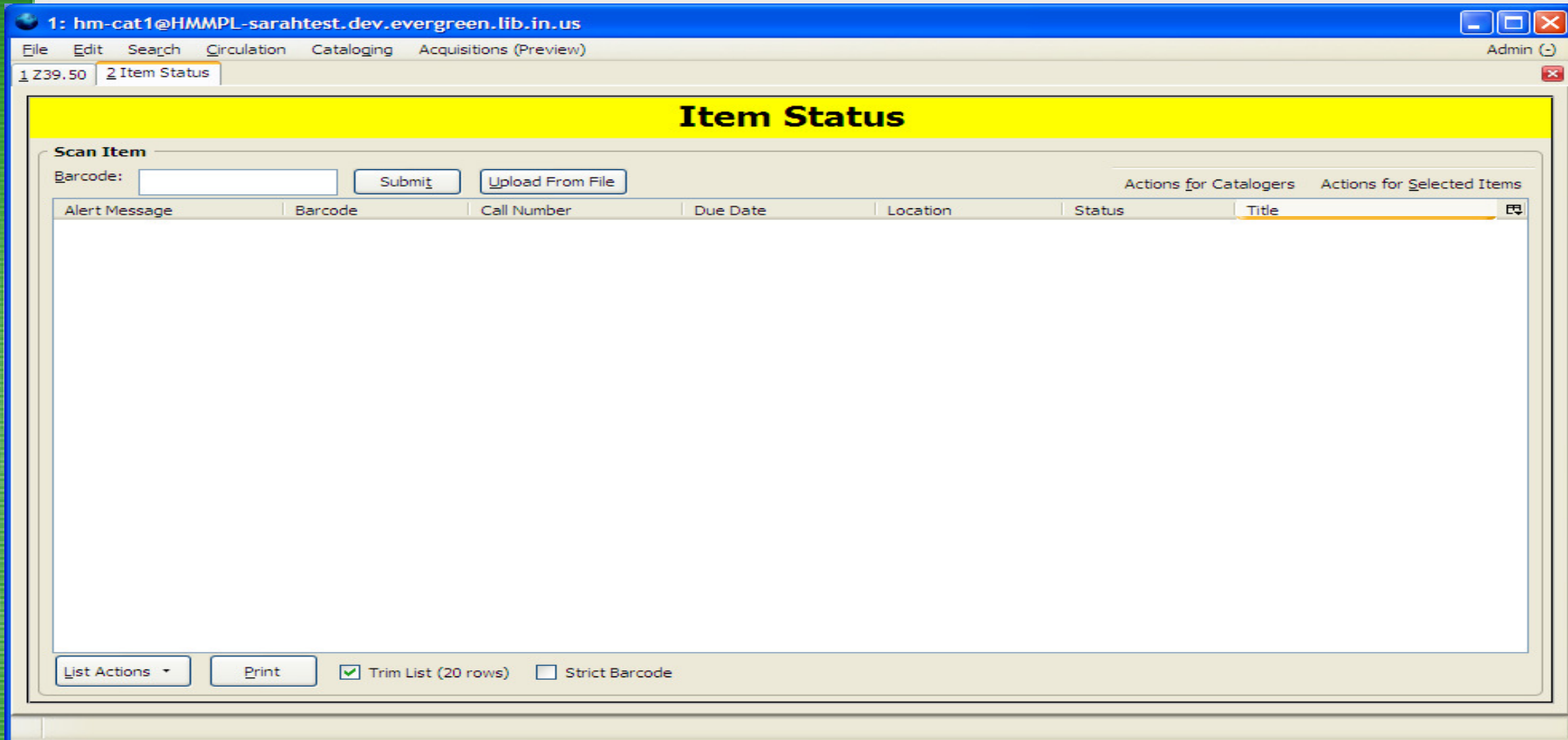Import, edit, delete or create new
bibliographic records.

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Why can't we add more circ modifiers?

- The addition of a circulation modifier requires Executive Committee approval.

- The primary function of circ modifiers is to set loan durations and limits.

  - For example:

  DVD: check out limit 10

   default loan duration 7 days

   renewal count 1

See the EI circulation matrix for details on loan durations and limits.

How should I delete holdings/volumes?

An easy way to remove several items at one time is to use the Item Status Screen.

How to delete holdings/volumes

1. Scan each item into the Item Status Screen.

2. Highlight all the items you wish to delete.

3. From the Actions for Catalogers pull-down menu, select Delete Items. Click OK when the "are you sure" window appears. Click OK again when the "items deleted" window appears. This may take awhile!

How to delete-continued

4. From the Action for Catalogers pull-down menu, select Delete volumes. (the items should still be highlighted) Click "delete" when the "are you sure" window appears. Click OK when the "volumes deleted" window appears.

(note: you can't delete the volume if you still have items attached)

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Tips for deleting item/volumes

It may take some time if you are deleting several items. It's best not to delete more than 50 at a time.

It is important that you delete all empty volumes. Any empty volume left on a record will prevent the record from automatically being removed when the last holding in the consortium is deleted.

Chapter 18/Deleting Records in the Cataloging Manual has more detailed instructions.

Working with multiple branches

"I have 3 branches and use the same cat1/cat2 logins at all 3 branches. Why is it important to have a different login for each branch?"

Well, it depends…

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Working with multiple branches

- For some libraries that works perfectly well. For others it doesn't. For one thing, it depends on how the shelving locations set up.

- If shelving locations are assigned to the system instead of the branches, then it's fine to use the same log-ins. If you want to be able to catalog for more than one branch at a time that's probably the best option.

- If you assign shelving locations to each branch, but give them all the same names, things may be fine, especially if they you only catalog at the main branch, and people at other branches are never going to make edits. In this case, however you need to be aware that technically the items at your branches have been assigned to shelving locations for the main branch.

- If you assign shelving locations to each branch, and are doing cataloging in multiple places with log-ins from multiple branches, this is likely to cause problems, like reporting issues, with things showing up for one branch on some reports and another branch on others.

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Working with multiple branches

"We have 3 branches. All of our cataloging is done at the main library, on their workstation with their login, and our shelving locations are identical. Will we have problems?"

You need to be aware that technically, the items have been cataloged with the shelving location from the main branch. The shelving locations display identically except when you open the copy editor. Then you can see that they are attached to a particular org unit.

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Working with multiple branches

Evergreen libraries with more than one location can add, edit, and delete holdings for multiple branches at the same time, as long as you're aware of the issues with shelving locations we've discussed.

Here are the instructions created by the Newton County Public Library

Creating Branch Records

Prior to logging into Evergreen Indiana open the file "spine label template" from your desktop or your flash drive, and then minimize it when it has opened. This will enable you to click on the minimized file on your lower toolbar to create spine labels as you catalogue items.

- 1.   Using Cat1 or Cat2 log-in, select "advanced search" from the EI splash screen.

- 2.   Select "quick search" on the left side of the page, and search by

ISBN. If you are unable to find a suitable record in this manner, search by title, author or keyword.

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Creating Branch Records cont.

- 3. After retrieving records, you need to match your item to the best record available, based on description and caliber of information within the record, such as the notes areas or subject headings.

- 4. At the top left of the page click on "Add Volumes".

- 5. The item record summary will appear:
- a. Scan the item barcode
  - b. Click in the box for call number and input the call number to comply with NCPL call number structures
  - c. Copy (highlight and then press CTRL + C) the call number

- 6. Click on the "Edit then Create" button in the lower right corner to save this information, and to bring up the item's attributes.

- 7. When the item attributes page has loaded, drop down the template listing at the top left of the page and select the appropriate template for both the item type **and** branch location.

Creating Branch Records cont.

- 8.   Click "apply" to apply the attributes for the template you have selected.

- 9.   Check attributes to be certain that they correctly represent the item you are cataloguing.

- 10.   Check and change the price of the item from that assigned to the template to that of the item you are cataloguing.

- 11.   When you are satisfied that the item attributes accurately represent the type, circulation patterning and location of the item you are cataloguing and that you are finished, click on "modify/create copies". Evergreen Indiana will return you to the bibliographic record to which you attached your item.

- 12.   If you have multiple copies of the item you just catalogued, click on "Add Volumes" and repeat steps 6 through 11 for each item. Be cautious to select the appropriate template from the dropdown menu, as this determines where the item goes physically and during inventory, since the shelving location is branch-specific.

Creating Branch records cont.

Working with multiple branches

- Options for avoiding issues with working with multiple branches:

- 1. Assign shelving locations to the system, not at the branch level.

- 2. Assign shelving locations with different names to your different branches, and use different templates when cataloging them so you don't inadvertently assign shelving locations from the wrong library to your items.

- 3. Be aware of this issue and understand how it affects your report results. Write your reports to avoid the pitfalls.

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For more FAQs

Questions about cataloging in Evergreen can be posted to the ListServ:

evergreen_indiana-catalog@lists.in.gov

or you can email any EI Cataloging Committee member.

Cataloging tips of the week can be viewed online at

http://www.in.gov/library/3700.htm

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