

Evergreen Indiana Cataloging break-out session

Cleaning up

Why do I need to do cleanups?

Since only one bibliographic record for each unique entity should be entered into the database, the title record is “owned” by all participating libraries, and catalogers from any library may edit a bibliographic record, if it is called for. Adding, deleting, or editing a bibliographic title record should be undertaken in accordance with Evergreen Indiana Cataloging Policy and Procedures.



How do I clean-up records?

Only an Evergreen Indiana Certified Cataloger (Cat-1) may import, overlay, merge, edit, create and delete MARC records.

- To become certified, you must successfully complete the Evergreen Indiana Advanced Cataloging class.

How did they get so messy?

New records (easy to find, easy to fix!)

New libraries (easy to fix, not as easy to find)

De-dupe projects (expert level: HIGH!)

Delete, overlay, merge, transfer

- Evergreen Indiana cataloging manual
<http://www.in.gov/library/5089.htm>

Deleting bib records Chapter 18

Overlaying records Chapter 13

Merging records Chapter 19

Transferring holdings Chapter 10

Deleting

- When deleting records from Evergreen Indiana, it is extremely important to use caution. Be certain that you are deleting what you wish to delete. If you delete the only item attached to particular bibliographic record in the Evergreen Indiana system, the bibliographic record will be deleted from the system. This can be done even by a cataloger with only copy level permissions.
- Only bibliographic records with no holdings may be deleted.

Overlaying

- Overlaying a record is the process of importing a new MARC record to replace a record currently in the system. This would be done if the existing record is insufficient in some way, needs updated, or to replace temporary records.
- When a record is overlaid, any holdings that were attached to the original record will be attached to the replacement. Essentially the new record takes the place in the system of the record being overlaid.

Merging

- The merge function allows you to eliminate duplicate bibliographic records. You select the best record and the holdings and any patron holds from the other records are transferred to the lead record selected. The merged records which were not selected as the lead are deleted from the catalog.
- When merging records, take care to ensure that the records do indeed match. Please use the same criteria for matching records to be merged that you would use to catalog an item. If there is any question as to whether or not the records should be merged, do not merge them. It is much easier to merge records than to unmerge them.

Transferring

- Transferring allows you to move holdings from one record or branch to another. This is useful when items have been attached to the wrong record during migration, when they have been mis-cataloged or mis-merged, or when you have items that will be transferred permanently to a different branch of your library.
- Transferring **volumes** means transferring a call number and all items attached to that call number simultaneously to another catalog record or another library.
- Transferring **items** means transferring a single specific item without the call number to a different call number. It can be a different call number on the same record or a call number on a different record

Reports

Think you're going
CRAZY?
Great!
When you get there
look me up and I'll
SHOW YOU AROUND!

Reports

- **My Folders**
- Templates
- Reports
- Output
- **Shared Folders**
- Templates
- Reports
- Output

How to find what you want

Shared Folders

Templates

isl-jasonb

Reports Taskforce (EG-IN)

Shared Templates (EG-IN)

Bibliographic Records (EG-IN)

Bills (EG-IN)

Circulation (EG-IN)

Collection (EG-IN)

Holds (EG-IN)

Items (EG-IN)

Patrons (EG-IN)

Requests (EG-IN)

Transits (EG-IN)



Fix de-dupes

3: wwplw-shelley@WWPLW-tech services.evergreen.lib.in.us

File Edit Search Circulation Cataloging Acquisitions Booking Admin (-) Help

1 Reports 2 Report Output: blu-rays2.5 3 Bib Record: 7068684 +

Go Back Reload Go Forward Debug

You are logged in as wwplw-shelley

My Folders

- Templates
- Reports
- Output

Shared Folders

- Templates
- Reports
- Output

Requests: created by isl-jasonb

Create a new report from selected template Submit

Limit output to All

Select All None	name	description	create_time	owner
<input type="checkbox"/>	Count of Items by Library	Library, item count.	2013-09-12 09:41	isl-jasonb
<input type="checkbox"/>	Items with Circ Modifier Attached to Records with Type	Lists TCN, record type, record id, and item barcode for selected circ modifiers and record types.	2013-11-12 10:26	isl-jasonb
<input type="checkbox"/>	Monthly Circ by Shelving Location	Shelving location and circ count	2013-09-03 15:58	isl-jasonb
<input type="checkbox"/>	Monthly Circulation by Circ Modifier	Circulation modifier and count for circs opened between dates. Checkouts to InternalUse accounts are ignored.	2013-09-24 09:05	isl-jasonb
<input type="checkbox"/>	Monthly Circulation by LIPLL patrons with Perry Twp Stat Cats	Please clone this template and add any addition fields you would like. This version shows the libraries items were circ'd from, and the count.	2013-08-09 12:06	isl-jasonb
<input type="checkbox"/>	Open Bills for Bookmobile Patrons	Lists Item Library, patron barcode, and item barcode for items with bills checked out from selected location(s). IF the library so chooses, fines and fees can be forgiven. Lost fines and fees can be forgiven for YOUR OWN ITEMS ONLY. If the Item Library is outside of your library system and the item is lost, you will have to contact the other library to discuss payment options.	2013-11-21 15:41	isl-jasonb
<input type="checkbox"/>	Previous borrowers for specified item	date and name for previous patrons	2013-09-24 09:56	isl-jasonb

Fix call #s

4: wwplw-shelley@WWPLW-tech services.evergreen.lib.in.us

File Edit Search Circulation Cataloging Acquisitions Booking Admin (S) Help

1 Reports +

Go Back Reload Go Forward

You are logged in as **wwplw-shelley**

My Folders

- Templates
- Reports
- Output

Shared Folders

- Templates
- hplc-localadmin
- plplc-localadmin
- rlplc-localadmin
- ccplc-localadmin
- qvplc-localadmin
- admin
- ampla-localadmin
- tcpcplc-localadmin
- hitplh-localadmin
- hm-globaladmin
- hnplc-localadmin
- tlplc-localadmin
- lipl-localadmin
- apl-localadmin
- mutplm-localadmin
- imcqueen
- wwplw-localadmin
- cdurbin
- qwplc-globaladmin
- isl-jasonb
 - Reports Taskforce (EG-IN)
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 - Patrons (EG-IN)
 - Requests (EG-IN)
 - Transits (EG-IN)
- rwelland
- ivcplc-localadmin

Bibliographic Records: created by isl-jasonb

Create a new report from selected template

Limit output to

Select	All None	name	description	create_time	owner
<input type="checkbox"/>		All Record Ids for Titles with Holdings	Record Id, copy count for all items held at selected libraries. This can be used to prepare an initial catalog extract for Boopsie. Output should be .csv, and can then be used in MARC Extract.	2013-06-24 12:06	isl-jasonb
<input type="checkbox"/>		Count of Records Added by Library between Dates	The number of records that were added between dates by users at specified libraries. Broken out by library and creator. "Home Library" refers to the home library of the user(s) that created records during that time.	2012-06-18 14:57	isl-jasonb
<input type="checkbox"/>		List Items with Matching Subjects	Library, call number, location, title, author, and barcode of items with matching Indexed Subject Fields. Finding records requires that the specified library has holdings on them! Also note that the subjects are not displayed because if there is more than one matching subject in a MARC record, duplicate results would be displayed for those items.	2013-03-25 16:11	isl-jasonb
<input type="checkbox"/>		List Records with Specific Fields Limited by Item Shelving Location	Lists the record id, title, field, and field value for specified fields. Requires that a library has holdings on the record!	2013-01-30 14:23	isl-jasonb
<input type="checkbox"/>		Record Ids for Titles with Holdings Added Since Date	Record Id, copy count for items added since date at selected libraries. This can be used to prepare an ongoing catalog extract for Boopsie. Output should be .csv, and can then be used in MARC Extract.	2013-06-24 12:20	isl-jasonb

start | Evergreen Staff Clien... | 4: wwplw-shelley@W... | Microsoft PowerPoint ... | Type - Google Chrome | 11:04 AM

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>

