Cataloging Procedures Guide

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Table of Contents

Cataloging Standards

Evergreen Indiana is committed to coordinating a database of high-quality bibliographic records for collective use by member libraries. These bibliographic records are the shared property of the consortium regardless of the number of holdings attached. It does not matter which library "created" the record, who transferred it into the database, or who has edited it since. Maintaining the quality and integrity of each bibliographic record is an interest and a responsibility we all share. The Evergreen Indiana Cataloging Committee sets standards for these records and oversees quality assurance.

This Evergreen Indiana Cataloging Procedures Guide is intended to serve as a supplement to the Evergreen Indiana Cataloging Policy and to the Evergreen Indiana Cataloging Training Manual.

Standards Reference Materials

It is recommended that libraries participating in Evergreen Indiana have the following cataloging resources available to the cataloging staff:

RDA Toolkit

http://www.rdatoolkit.org/essentials
Implementation of Resource Description & Access (RDA) began March 31, 2013 and replaced AACR2 as the new cataloging standard. Evergreen member libraries are encouraged to purchase access to the online toolkit at a reduced rate via a consortium purchase.

or

Print version: *RDA: Resource Description and Access*, 2013 ed.
ISBN-13: 978-0-8389-12102 with any applicable updates

or

Print version: *RDA Essentials, Second Edition* (2024)
ISBN: 978-0-8389-4630-5

RDA was designed to be an online tool and will undergo many transformations and updates, so the toolkit is preferred, but the print version is a more affordable option.

Bibliographic Formats and Standards

Available for free online at: http://www.oclc.org/bibformats/default.htm

Library of Congress MARC 21 Formats for Bibliographic Records

Available for free online at: http://www.loc.gov/marc/bibliographic/

AACR2

Since many of the records in the Evergreen Indiana Catalog are cataloged according to AACR2, it is also recommended as a resource.

NOTE: AACR2 is included in the RDA toolkit.

The original Anglo-American Cataloging Rules, 2nd edition plus all of the revisions or the edition of the Anglo-American Cataloging Rules 2nd edition which contains all of the revisions. All of the editions and revisions are listed below.

Anglo-American Cataloging Rules, 2nd edition, 2002 revision plus amendments
Jointly published by: The American Library Association (ALA), The Canadian Library Association (CLA), and The Chartered Institute of Library and Information Professionals (CILIP).
Available for purchase at: http://www.alastore.ala.org or http://www.amazon.com/

Anglo-American Cataloguing Rules, 2nd Edition, 2002 Revision, 2005 Update (Kit)
Complete text with annual updates from 2003 through 2005, plus tabs
ISBN-13: 9780838935552
ISBN-10: 0838935559

Anglo-American Cataloguing Rules, 2nd Edition, 2002 Revision: 2005 Update (Update Pages Only) Binder ready loose-leaf pages
ISBN-13: 9780838935576
ISBN-10: 0838935575

Anglo-American Cataloguing Rules, 2nd Edition, 2002 Revision: 2005 Text Block (Complete Text Including Update Pages)
Complete text with annual updates from 2003 through 2005 (no companion binder or tabs)
ISBN-13: 9780838935552
ISBN-10: 0838935559

Dewey Decimal references

For those libraries that use the Dewey Decimal classification system, any of the following Dewey resources:

Dewey Decimal Classification and Relative Index, Latest edition (A Division of OCLC)
4-volume hardback set, unabridged
Available print-on-demand at https://www.oclc.org/en/dewey/

Abridged Dewey decimal classification and relative index Latest edition
1 volume, abridged

WebDewey and *Abridged WebDewey*
http://www.dewey.org/webdewey/
WebDewey is a web-based version of DDC 23. Abridged WebDewey is a web-based version of the Abridged 15.

The standards contained in the cataloging sources listed above should be consulted and followed when entering new records into Evergreen Indiana and when modifying existing records in the Evergreen Indiana bibliographic database.

Street dates

The publisher's release date for an item, often referred to as the 'street date', is the date it is released for sale or distribution. Materials may be cataloged prior to the street date so long as they are not made available for checkout. Any material cataloged prior to its street date must show a status of "in process" or "on order" in Evergreen regardless of where the item is physically at your library. Patrons are able to place holds on items with either of these statuses.

Portions of Records and Their Ownership

Records in the Evergreen Indiana cataloging file form a hierarchy and consist of three levels: The first level is a bibliographic title record, containing cataloging information at the title level (e.g., author, title, edition, publishing information, physical description, etc.). The next level of a cataloging record is the Call number, containing local holdings information. Finally, there is the Item level which contains item specific information such as the barcode number and any information related to that specific item.
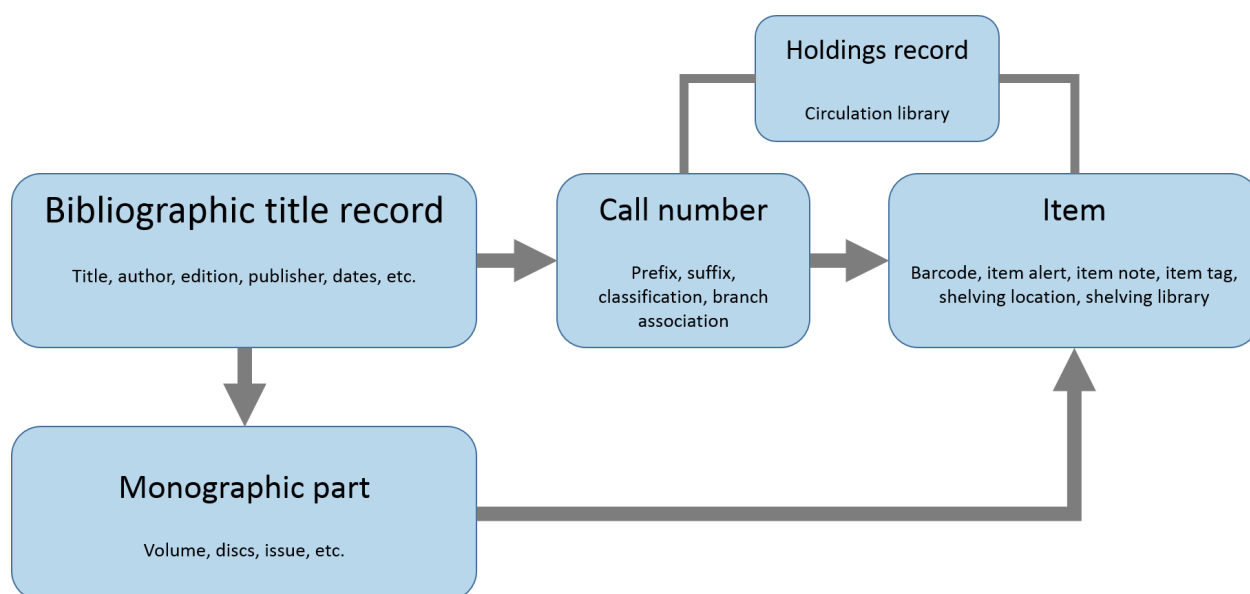
Since only one bibliographic record for each unique entity should be entered into the database, the title record is "owned" by all participating libraries, and catalogers from any library may edit a bibliographic record, if it is called for. Adding, deleting, or editing a bibliographic title record should be undertaken in accordance with Evergreen Indiana Cataloging Policy and Procedures.

NOTE: Although monographic part information is assigned on the item level, it is also "owned" and used by all participating libraries.

The second portion of a cataloging record is the holdings record. The holdings record includes all call number level and item level information. Local holdings information belongs to the entering library. Local library systems may make their own decisions on local processing policies and procedures for handling their item information, in accordance with Evergreen Indiana Cataloging and Circulation Policies and Procedures. Libraries may not make changes to the Holdings Records of other libraries. If someone working with a record notices what appears to be an error in a holdings record belonging to another library, or if

a holding appears to be attached to an incorrect bibliographic record, a request to check on the matter should be sent to the cataloging contact person at the library in question. If many libraries need to be contacted, a message can be sent to the Evergreen Indiana Cataloging listserv. The address is the following:

evergreen_indiana-catalog@lists.library.in.gov

In such cases it is very helpful to list in the subject line the libraries that need to do the checking. If there are too many to list, a more general notification may be sent.

If your system is notified that there seems to be a problem with one or more of your item records, you have an obligation to check on the matter and to try to resolve any problems that you find. If resolution of a problem is not possible with the authorization level available within a library, it may need to be referred to the Evergreen Indiana Cataloging Committee. Any notice required to be given to the Evergreen Indiana Cataloging Committee should be given via the Evergreen Indiana Catalog Listserv.

Cataloging Permissions

There are two primary levels of cataloging permissions in Evergreen Indiana: Cat1 and Cat2. Specific trainings are required to obtain and retain these permissions.

Explanation of Roles

Copy Catalogers (Cat2) may:
- Attach holdings to and remove holdings from existing bibliographic records
- Edit call number and item level data
- Create and edit monographic parts

Evergreen Indiana Certified Catalogers (Cat1) may:
- Do everything allowed to Copy Catalogers
- Import records via batch loading
- Overlay existing records
- Create original bibliographic records
- Add new fields to bibliographic records
- Merge bibliographic records
- Update bibliographic records
- Delete existing bibliographic records
- Delete fields in existing bibliographic records prior to or after import
- Delete, and merge monographic parts
- Add cover art images to bibliographic records

All Evergreen Indiana Catalogers (both Cat1s and Cat2s) should be able to:
- Understand/interpret MARC records
- Have knowledge of and follow established matching criteria for all relevant formats (such as books, sound recordings, and video materials) in order to determine whether a record is a match for an item in hand
- Search the Evergreen Indiana group catalog efficiently and accurately
- Monitor the Evergreen Indiana cataloging listserv:
    - Please subscribe at:
      http://lists.library.in.gov/mailman/listinfo/evergreen_indiana-catalog

Required Trainings

Copy catalogers (Cat2) are required to complete either the Basic Cataloging course or be trained internally by a local Cat1 cataloger before working in the catalog. The Evergreen Indiana Beginning Cataloging Class is offered approximately quarterly at the State Library.

You can find course times and register here: [Evergreen Indiana Calendar](#)

The Basic Cataloging curriculum may also be available as an asynchronous online course here:

http://learn.evergreen.lib.in.us

Only an Evergreen Indiana Certified Cataloger (Cat1) may import, overlay, merge, edit, create and delete MARC records. Certified catalogers (Cat1) are required to complete the full Advanced Cataloging curriculum (offered either as an in-person workshop or webinar by a member of the Cataloging Committee) and then complete 1 required continuing education component periodically thereafter to obtain and retain Cat1 status. The Basic Cataloging course material is prerequisite to taking the Advanced Cataloging workshop. The Evergreen Indiana Advanced Cataloging class is offered approximately quarterly as a webinar. In-person Advanced Cataloging workshops are offered as trainers are available.

Classes are announced on the Evergreen Indiana calendar: [Evergreen Indiana Calendar](#)

The options for the required continuing education courses currently include:
- Periodic refresher course (1-2 hours, online or in-person)
- Advanced Cataloging Workshop (4 hours, webinar or in-person)

Additional optional, but highly recommended, trainings are made available each fall and spring for all Evergreen Indiana catalogers and copy catalogers at the Cataloging Workshops.

Evergreen Certified Catalogers using this Guide are assumed to be knowledgeable of MARC and AACR2 standards. If you need training in these areas, contact the Evergreen Indiana Director at the State Library or a member of the Evergreen Indiana Cataloging Committee for a list of organizations who offer classes. As of March 2013, Certified Catalogers are expected to have learned or be in the process of learning RDA standards. This Procedures Guide is not a substitute for any of this training.

Online cataloging webinars and courses for additional training

Webinars are available for and online courses are available from ALCTS. You can watch recordings for free after 90 days.

http://www.ala.org/alcts/confevents/upcoming/webinar

Archived Evergreen Cataloging Roundtables:

http://learn.evergreen.lib.in.us

Suggested resources for MARC, AACR2, RDA, & Evergreen

Evergreen catalogers are encouraged to use the following resources:
- Evergreen Indiana Cataloging Manual (free online)
  https://blog.evergreen.lib.in.us/?page_id=2632
- Evergreen Indiana Guide To Material Type Icons
  https://bit.ly/2FOGZMJ
- OCLC Bibliographic Formats and Standards (free online)
  http://www.oclc.org/us/en/bibformats/default.htm
- Library of Congress Authorities (free online)
  http://authorities.loc.gov/
- Library of Congress Genre/Form Terms (LCGFT)
  https://www.loc.gov/aba/publications/FreeLCGFT/freelcgft.html
- Library of Congress MARC 21 Formats for Bibliographic Records (free online)
  http://www.loc.gov/marc/bibliographic/
- RDA Toolkit (online version available at a consortium discount)
  http://access.rdatoolkit.org/
- Evergreen Indiana Cataloging Listserv
  evergreen_indiana-catalog@lists.library.in.gov
  - To sign up, on this website:
    http://lists.library.in.gov/mailman/listinfo/evergreen_indiana-catalog
- OLAC Best Practices for Cataloging DVDV-Video and Blu-ray Discs, Objects, Streaming Media, and Video Games Using the Original RDA Toolkit and MARC 21
  https://cornerstone.lib.mnsu.edu/cgi/viewcontent.cgi?article=1027&context=olac-publications
- Best Practices for Cataloging Comics and Graphic Novels using RDA and MARC 21 (free download)
  https://alair.ala.org/bitstream/handle/11213/18623/GNCRT%20Comics%20Cataloging%20Best%20Practices.pdf?sequence=5&isAllowed=y

Revocation of Privileges

Evergreen Indiana reserves the right to revoke the cataloging privileges of any member library if its work repeatedly fails to meet the established standards or if the cataloging training requirements are not maintained. As a result, training for all new catalogers is mandatory, and it is the library's responsibility to notify the Evergreen Indiana Cataloging Committee of any changes in staffing as soon as possible.

The cataloging privileges of a member library will not be revoked prior to consultation with the member library's director, cataloging staff, and if necessary, the library board of directors.

Non-adherence to Established Evergreen Indiana Cataloging Policies can result in member libraries being declared non-compliant.

Situations which could cause an Evergreen Indiana library to be declared non-compliant include but are not limited to:

- Not reading messages posted on the Evergreen Indiana Cataloging Listserv and/or not following the instructions/requests stated therein
- Not following Evergreen Indiana policies and procedures
- Allowing Cat1-level work to be done by a person who has not been adequately trained
- Failing to send a staff member to receive Evergreen Indiana cataloging training

Cataloging freezes

Any cataloging freezes will be announced on the EI Cataloging listserv. Complete cataloging freezes are sometimes necessary immediately before and/or after an Evergreen software update. During a complete freeze, all cataloging activity, including holdings maintenance is suspended. This type of freeze affects both Cat1 and Cat2 catalogers.

Modified Cataloging Freezes occur for a few hours when records from a migrating library are integrated into the Evergreen database. During a modified freeze, Cat1 catalogers are downgraded to Cat2 status and may continue to perform holdings maintenance tasks for the duration of the freeze. Cat2 catalogers are unaffected by modified freezes. Catalogers will be notified when the freeze is lifted via the listserv.

Reporting and resolving problems

Problems or complaints regarding record quality or errors should be sent to the Evergreen Indiana Cataloging Committee. The Evergreen Indiana Cataloging Committee is the final authority in resolving quality concerns.

Copy Cataloging

What is Copy Cataloging?

In Evergreen Indiana (EI), copy cataloging means finding a bibliographic record that matches the item you wish to catalog and attaching your item to that record. Evergreen catalogers refer to the item to be cataloged as "the item in hand" and the process of adding it to the bibliographic record as "attaching your holding". A bibliographic record is also called a MARC record, a bib record, or simply "the record".

Copy Cataloging Workflow

1. Search Evergreen Indiana for a record that matches the item in hand, using the matching guidelines below. See **Searching the Evergreen Indiana Catalog in the EI Cataloging Manual** for help in searching the Evergreen bibliographic database.

2. If a matching record is found, attach your local holding. Refer to **Adding Holdings in the EI Cataloging Manual** for instructions on adding call numbers and items to bibliographic records.

3. If a record is not found, pass the item on to an Evergreen Indiana Certified Cataloger (Cat1) at your library to import or create a suitable record.

Bibliographic Matching Guidelines

When searching for a bibliographic record that matches the item you wish to catalog, carefully compare the record to the item you have. The following fields, if present, must match your item in most situations. If they do not match, do not attach your holdings. If not sure, refer to the additional field information in the next section, ask a Certified Cataloger at your library, or consult the Evergreen Indiana Cataloging listserv.

Field	Description
010	LC Control Number
020/022	ISBN/ISSN
024	UPI/UPC code
028	Publisher number
245	Title statement
250	Edition statement

260/264 ‡b‡c	Publication, distribution, etc.
300	Physical description
347 ‡b	Digital file encoding format
505	Contents
753	System details access to computer files

Matching details for each field

MARC Tag	Matchpoint Notes
010	LC Control Number if present in the record.
020/022	ISBN or ISSN if present in the record and on the material. (See variations.)
024	UPI/UPC number if present in the record and on the material. (See variations.)
028	Publisher number if present in the record and on the material.
245 ‡a	Must match, especially for books. For AV materials, check 500 notes on sources of title information if titles in 245 fields don't quite match your item in hand.
245 ‡b	May match; matching information could be in a note.
245 ‡c	May match; matching information could be in a note.
250 ‡a	Must match, except for the following cases: If there is a 1st edition statement in the record but not in the book or vice versa, the item may still be considered a match. A book club edition statement may be ignored. A library edition statement may be ignored. (See variations.)
260/264 ‡a	Should match in most cases, but allow for variations within the same country between printings of the same edition as well as variation in items with more than one place of publication. If more than one place of publication is involved, the first place on your piece should match the first place in the record.
260/264 ‡b	Should match in most cases, but variations may occur if you are matching a multipart item or an item with more than one publisher. If the publisher on your item is part of the same organization as the publisher on the record, consider it a match. (See variations.)

260/264 ‡c	Must match unless the date is in brackets or with question marks.
300 ‡a	Must match, but allow for varying styles of entry. For AV materials, a variance of 2-3 minutes in running time is allowed. For print materials, differences of 3 or less pages (unless the item is 10 pages or less) consider the record a match.
300 ‡b	Must match, but there may be slightly varying styles of entry.
300 ‡c	Must match for AV materials. For books, if the dimension varies by up to 2 centimeters, and that is the only difference, consider it a match. (See variations.)
347 ‡b	Must match media type. See the Guide to Material Type Icons for current definitions.
490/8xx	Must match if present, but tracing can differ. Be aware of non-standard series statements.
500	All special/bonus features listed in the record must be included in your item. The list in the record does not need to be comprehensive. Note: previews of upcoming releases are not considered a special feature.
501	"With" note. Must match.
511	Performers, narrators, presenters, etc. must be same for AV materials. This information could also be in a 500 note.
505	Contents must be same; but be aware of partial or incomplete contents by examining the first indicator of this formatted note field.
533	Reproduction note: Must match if present.
538	For Audiovisual materials, formats must be the same: CD is not cassette; DVD is not videocassette or Blu-ray. For electronic resources, system requirements should match.
546/041	Language note/code must be the same.
753	For videogames and software. See the Guide to Material Type Icons for current definitions.

For detailed field-by-field matching, see OCLC's manual Section 4 "When to input a new record" in Bibliographic Formats and Standards at:
http://www.oclc.org/bibformats/en/input/default.shtm

18

Some exceptions and special situations

Variation in ISBN because of new binding (020)

Sometimes a paperback edition is rebound by another company, such as BWI, Turtleback, or Paw Prints. Although the rebound item is assigned a new ISBN, the content of the book has not changed. If the ISBN from the original publisher matches the ISBN in the record, you may attach the holding. You can find the original ISBN on the inside of the book, usually on the title page verso.

If the ISBN for the new binding is not present on the record, the local Cat1 cataloger should add another 020 field with the ISBN.

Occasionally books, particularly paperbacks, are re-released with a new cover. If the art work date for a new binding is the only difference, you may attach your holding.

Variation in UPC (024)

Publishers and distributors of media frequently repackage materials and assign new UPCs without changing the content of the media. If the number in the 024 is the only difference, consider the record a match.

If the UPC for the repackaged material is not present on the record, the local Cat1 cataloger should add another 024 field with the UPC.

Matching the 028 field (AV material)

If the number in 028 field is the only difference, consider the record a match.

If the Publisher or Distributor Number (028) for the new holding is not present on the record, the local Cat1 cataloger should add another 028 field.

Variations in the edition statement (250)

Trade paperback editions

Trade paperbacks are often able to share records with hardcover books if the only difference in the edition statement is the binding form, i.e. a first edition hardcover and a first trade paperback edition may be considered a match. However, mass-market paperbacks seldom can be attached to a record for a hardcover copy due to other variances.

Book club editions

You can attach a Book Club edition to a record for a regular edition if the edition statement is the only difference. If the ISBN for the Book Club edition is not present on the record, the local Cat1 cataloger should add another 020 field.

Library editions

You can attach a library edition to a record for a regular edition if the edition statement is the only difference. If the ISBN for the library edition is not present on the record, the local Cat1 cataloger should add another 020 field.

Audiobooks

Library edition audiobooks are usually identical to the trade edition except for the ISBN and possibly the publisher number and packaging. In some cases they may also have library edition statements. The edition statement can be ignored, if the extent and contents of the items are the same--including number of discs, time, and narrator.

There is usually a more favorable replacement policy for library edition audiobooks, so it is recommended that item notes be used if you need to denote which edition your library owns.

A trade edition for an audiobook may be attached to a record for a library edition if everything else on the record matches the item in hand. A library edition audiobook may likewise be attached to a record for a trade edition.

If all other criteria match and you attach your audiobook, check to make sure the ISBN and publisher number (028 field) for your item appear on the record. If necessary, the local Cat1 cataloger should add this information.

Numbered and named editions

If there is a 1st edition statement in the record but none is found in or on the item or vice versa, the item may still be considered a match if the missing edition statement is the only difference.

For any other numbered (3rd, 5th, 18th, etc.) or specially defined (Revised, extended, large print, director's, widescreen, etc.) edition, it is not a match.

Rental editions

You can attach a rental edition of AV material to a record for a regular edition if the edition statement is the only difference. If the ISBN/UPC for the rental edition is not present on the record, the local Cat1 cataloger should add another 020 field.

NOTE: Watch carefully for missing special features and alternate language tracks on rental editions which require the materials to be placed on a separate record.

Variations in publisher name (260/264 ‡b)

Variations in the publisher name may be acceptable when there is a known connection between a publisher and their imprints (e.g., Penguin and their children's paperback line, Puffin).   Acceptable variations include:
- Penguin & Puffin Books
- Scarecrow Education & Rowman & Littlefield Publishing Group
- HQN & Mira.
- Dafina & Kensington
- T Boureay & Avon
- Simon & Schuster Paperbacks & Fireside
- Free Press, a division of Simon & Schuster, Inc.
- Checkmark and Ferguson, both imprint of Infobase
- EDC Pub. & Usborne
- Bluesky Press, Cartwheel Press & The Chicken House are all imprints of Scholastic

Note that this list is not comprehensive. It can be useful to check the publisher's website or Wikipedia when all the information in a record is a match except the publishing company.

Other helpful resources for tracking down imprints include:
- Big 5 Imprints Map
- Kensington Imprints
- Scholastic Imprints
- Amazon Imprints

If a back catalog title has been acquired by or leased to another publisher/distributor, but all other matchpoints are the same, including the ISBN, then a second 264 with the alternate house may be added to the record as well as the holding.

Example:
```
=020  _ _ ‡a 0761455191
=245  14 ‡a The three little tamales / ‡c by Eric A. Kimmel ; illustrated by Valeria
          Docampo.
=264  _1 ‡a New York : ‡b Marshall Cavendish Children, ‡c [2009]
=264  31 ‡a Seattle, WA : ‡b Two Lions Publishing, ‡c [2011]
=264  _4 ‡c ©2009
```

Variations in measurements (300 ‡a/‡c)

Packaging variations may cause it to appear that materials are not a match. Evergreen Indiana policy allows for the following variations to occur and still be considered a match.

Books

The physical binding of the book may vary in dimensions up to 2 cm.

Pagination must match with the following exception:

> If the book contains preview material for other publications at the end of the book, which is included in the total pagination of the book, you may exclude the preview material's pagination when comparing your holding for a match.

Supplementary content, such as a reading guide, discussion questions, or other content the cataloger deems significant, should be noted in a 500 entry and, if the pages are numbered, must be included in the 300 ‡a pagination count. Previews of upcoming materials are not considered supplementary or special content.

Audiobooks

Audiobooks may vary in listed run time up to 2 minutes and be considered a match. This is usually the result of rounded times being listed on the packaging versus the actual running time of the recording.

Videodiscs

Videodiscs may vary in listed run time up to 2 minutes and be considered a match. This is usually the result of rounded times being listed on the packaging versus the actual running time of the main feature.

Paperback and hardcover books on the same record

See: Paperback and hardcover books on the same record under Guidance for Specific Materials.

Advance Readers' copies

An advance reader copy (ARC) of a book is sometimes distributed to reviewers, bookstores, and magazines three or six months before the book is officially released. The text of an ARC often differs from the final version of the book.

An ARC of a book should not be attached to a record for the final version of the published material. ARCs should be on their own separate record with a 250 field indicating that it is the Advance Reader copy. See Records for advance reader copies for cataloging details.

Corporate/Organizations Versions

Some corporations (such as Scholastic) and organizations (such as the Dolly Imagination Library) publish books that were originally published by another company. These books are often identical internally to their original versions and have the same pagination and the same publication and/or copyright date. They often feature a different ISBN than what was on the original version. Catalogers may add their holdings for these versions of a book to the record for the original version despite the difference in publisher and ISBN if the publication date and all of the description in the 300 field match the book. A local Cat1 cataloger should add another 020 field containing the new ISBN in a subfield a and the publishing corporation or organization in a subfield q.

‡a 9780593111789 ‡q (Dolly Imagination Library)
‡a 9780593091913 ‡q (Kohl's Cares)
‡a 9780316449632 ‡q (Sam's Club/Walmart)
‡a 9781338614367 ‡q (Scholastic)

Books packaged with other resource type combinations

If your item in hand has two components, such as a book with a CD in back or an audiobook with a bonus DVD, decide which component is the primary material and then select a record that is based on that item. If the resource contains a book and some sort of media which seems to be of equal importance, consider the media as the primary material.

For example, a book with a CD pocketed in the back will be cataloged as a book. A book and sound recording packaged together in a 'hang-up bag' may be of equal importance, but in Evergreen it is cataloged as a sound recording.

Book club sets

Several libraries maintain sets of books to be used by book clubs. These may be cataloged in several ways depending on the preferences of the library. While some libraries keep the multiple copies in a bag or container and have just one barcode for the whole set, other libraries barcode each book. Evergreen Indiana can accommodate both.

To catalog as a set and enable patrons to check out and place holds on individual copies:
1. Add a separate call number to the record for the set of books.
2. Incorporate the words "Book Club" or something similar into the call number.

3. Add each item under that call number. Individuals can then check out or place holds on each item, as many as they need.

To catalog as a set but restrict circulation to the entire group of books, not individual copies:
1. Keep the group of books together in a container and attach a single barcode to the box or bag.
2. Add a separate call number to the record for the set of books. Incorporate the words "Book Club" or something similar into the call number.
3. Attach the single holding for the set. In the Holdings Editor screen, assign the "set" circulation modifier.
4. Patrons can check out the entire set, but not individual copies.

If the library has a set of books and additional materials, such as study guides, or discussion questions, in a container or bag, these should be cataloged as a kit on a separate MARC record.

Keeping different media formats on separate records

Although the content may be the same, generally media on different formats belong on separate records. By following the matching guidelines outlined at the beginning of this chapter, you will not accidentally combine media formats on the same record.

Playaways, MP3-CD audiobooks, CD audiobooks, and audiobooks on cassette should all be on separate records. Likewise, videocassettes and DVDs should never be attached to the same record. For videodiscs, please see Keeping different media formats on separate records.

Supplementary digital content discs

If an item such as a DVD or an audiobook comes with a one-time only downloadable digital disc, please pull that disc from the packaging. If the disc is listed in the MARC record, it should be deleted by a Cat1 cataloger.

If the contents of a digital content disc can be downloaded multiple times, such as a reader's guide, forms, etc., keep the disc with the packaging and ask a Cat1 to record its existence in the MARC record if it is not already listed.

Serial Copy Cataloging

Monographs cataloged as serials

Monographs may be cataloged as serials if appropriate. For example, Fodor's travel guides and several reference books come out on an annual basis. Individual circulating items on a serials record should be assigned a Monograph Part so they are holdable by patrons at the call number level.

Adding magazine issues

Magazines are added to serial records because they are a continuing resource. (Serial records have "9999" in the Date2 fixed field.) Do not attach your holding to a bibliographic record that is just for one magazine issue. All your library's issues of a particular magazine should be added to the same serial record. Follow the same workflow as for other types of materials.

Create a new call number for each new issue and attach the holding. You may wish to construct a call number that incorporates the date or volume/number so that it can be easily distinguished from other issues. You may also wish to use Monograph Parts so that individual issues are holdable by the patron directly. Please see **Using monograph parts for periodicals** for more information.

Find step-by-step instructions for adding magazine issues in the chapter on **Periodicals** in the Evergreen Indiana Cataloging Manual.

Monthly comic books

Comic books that are published monthly should be cataloged like other monthly periodicals. A record for each new title should not be added to the catalog, and holdings for individual issues should be attached to the title record.

For information on how to add each issue as a call number, see **Adding New Issues** in the Evergreen Indiana Training Manual.

If you want to enable patrons to place holds on individual issues, create and assign a Monograph Part to each issue as it is cataloged. See **Using Monograph Parts for Periodicals** in the Evergreen Cataloging Manual for instructions on how to do this.

Monograph Parts

A single bibliographic record may be used for resources containing multiple volumes, issues, or parts. Examples would be a set of encyclopedias, a television show on DVD processed in multiple packages, serial publications, or long audiobooks packaged in multiple cases, each element with its own separate barcode.

Use the Monograph Parts function in the Holdings Editor to apply monograph parts to these items. Monograph parts should NOT be used unless needed to differentiate between materials with different content attached to the same record. Do NOT add duplicate monograph parts if the existing monograph part names do not follow the guidelines below. The existing monograph part names should be edited in the Monograph Parts editor to conform with procedure. Cat 1 catalogers are encouraged to merge duplicate monograph parts. If a monograph part name is unclear, please contact libraries with holdings on that monograph part for clarification.

General rules for Monograph Parts

When creating or editing a monograph part, please observe the following general rules:

Rule	Do Use	Do Not Use
Do **NOT** use abbreviations*	Volume Disc Issue Number	~~V. or vol.~~ ~~D.~~ ~~Iss.~~ ~~no.~~
Use numerals	1, 2, 3	~~First~~ ~~One~~ ~~Second~~ ~~Third~~
Use sentence case, not all caps.	Disc 1-2 Rescuers down under	~~DISC 1-2~~ ~~Rescuers Down Under~~
Use a dash, not an ampersand, to define a range of numbers.	Disc 1-2	~~Disc 1 & 2~~
Be specific where there's a chance of variation in contents.	Disc 1-20 Disc 21-37	~~Part 1~~

If the materials have explicit part names, use them. Example: Encyclopedia's unnumbered sixth volume containing entries beginning with E-Fah.	E-Fah ~~Volume 6~~

*The exception is for serials and periodicals months should be abbreviated as described below.

Using Monograph Parts for Magazine Issues

Adding monograph parts to magazines in order to allow patrons to place their own holds on magazine issues is optional. If you do opt to use monograph parts for magazine issues at your library, monograph part names must follow the following formatting rules:

- The year the issue was published should always be the first element of the monograph part name, including quarterly and special issues.
- Dates should be entered numerically in the order of Year, Month, Day for chronological sorting.
- Abbreviated month names should be included in parentheses after the month number to aid patrons. Abbreviations are the first three letters, with the first letter capitalized,and no period.
- Include only the first date for bi-weekly and weekly magazines that give a date range.
- Double issues of bi-weekly and weekly magazines should only use the first date and the Double issue entry
- Quarterly magazine issue names should follow the description of that magazine.
- Special issues can be named as deemed appropriate.

Format the monograph part names according to the following examples:

Monthly magazine, January issue	2020 01 (Jan)
Bimonthly magazine, January/February issue	2020 01/02 (Jan/Feb)
Bi-weekly/weekly magazine, January 27 issue	2020 01 (Jan) 27

Quarterly magazine, Spring issue	2020 Spring
Quarterly magazine, January/February/March issue	2020 01/02/03 (Jan/Feb/Mar)
Double issue, monthly magazine	2020 01/02 (Jan/Feb) Double issue
Double issue, bi-weekly/weekly magazine	2020 01 (Jan) 27 Double issue
Special issue, Special Dining Issue is a bonus 13th issue of a monthly	2020 Dining issue
Special issue, July issue is listed as Special Dining Issue!	2020 07 (Jul) Dining issue
Special issue, bi-weekly/weekly magazine	2020 07 (Jul) 27 Swimsuit issue
Bimonthly magazine, year end	2019 12/2020 01 (Dec/Jan)
Bi-weekly that spans months	2020 01 (Jan) 27
Magazine issued as volumes ; no dates	Volume 365
Magazine issued with volume and issue numbers ; no dates	Volume 20, Number 01

Note that these rules affect monograph part names only, since monograph parts are shared by all libraries. Call numbers continue to be a local decision.

Using Monograph Parts for Audiobooks

Occasionally, some audiobooks are packaged in multiple cases due to the large number of discs included. In that case, to facilitate proper holds and transiting of the appropriate materials, monograph parts should be added for each package. If the audiobook is only ever packaged in a single container, no part should be assigned.

For consistency, proper sorting, and to avoid duplicate monograph part names, please apply the following rules and scenarios for naming monograph parts:

Rule/Scenario	Do Use	Do Not Use
When discs are numbered, spell disc with a "c", not a "k".	Disc 1-8 Disc 9-20	~~Disk 1-8~~
Use the singular form of "Disc".	Disc 1-12 Disc 13-24	~~Discs 3-5~~
For multi-title collections circulated by title on a single bibliographic record, list the individual title in the part. E.g., whole titles from *The Harry Potter complete audio collection* OR Whole titles from *The complete Arkangel Shakespeare*	Year 1, Harry Potter and the chamber of secrets Hamlet	~~Disc 1-12~~
If a title is packaged in separate, named parts by the publisher and the library is using the publisher's parts, use the provided part name and add a 500 note detailing the contents of the named part.	Volume I AND 500 ‡a Volume I contains discs 1-18. Volume II contains discs 19-32.	

Using Monograph Parts for Videodiscs

In order to facilitate a single workflow and proper holds and transiting of the appropriate materials thereby reducing hold confusion for patrons, it is critical that all videodiscs have parts associated with them. Individually issued items which are consistent on all matchpoints with the materials of the same format issued in a combo pack should be attached to the combo pack record with the appropriate part assigned. In other words, if an individually released DVD is an exact match for the DVD disc sold as part of a combo pack, catalog your holding on the combo pack record. If the individually issued items are not consistent on all matchpoints of the materials of the same format on the combo record, please enter them on separate records, assign appropriate parts, and do not attach them to the combo pack record.

For consistency, proper sorting, and to avoid duplicate monograph part names, please apply the following rules and scenarios for naming monograph parts:

Rule	Do Use	Do Not Use
When discs are numbered, spell disc with a "c", not a "k".	Disc 1 - Blu-ray	~~Disk 1~~
Except for "All discs", use the singular form of "Disc".	Disc 1-2 - DVD	~~Discs 3-5~~
For videodiscs, the final portion of the part should always define format.	Season 1, All discs - DVD Disc 1-2 - Blu-ray	~~All discs: Season 1~~ ~~Disc 1-2~~
For television series, only list the season in the part if the discs are part of a multi-season box set on a shared record.		
Example: Disc 1-2 from Season 4 of the complete Game of Thrones box set.	Season 4, Disc 1-2 - DVD	~~Disc 1-2 - DVD~~
Example: Disc 3-4 from the individually sold Season 2 of Star Trek	Disc 3-4 - DVD	~~Season 2, Disc 3-4~~

Scenario	Do Use	Do Not Use
Single DVD disc	DVD	~~BLANK~~ ~~Disc 1~~ ~~Dvd~~ ~~dvd~~
Single Blu-ray disc	Blu-ray	~~BLANK~~ ~~Blue-ray~~ ~~Disc 1~~ ~~BD~~
Single 4K Blu-ray disc	4K Blu-ray	~~BLANK~~ ~~4K~~ ~~Disc 1~~
Single Blu-ray 3D disc	Blu-ray 3D	~~BLANK~~ ~~3D~~
All discs in a set split by format only.	All discs - DVD AND/OR All discs - Blu-ray AND/OR All discs - 4K Blu-ray	~~BLANK~~ ~~All discs~~ ~~DVD~~ ~~Blu-ray~~ ~~4K~~
All discs in multiple formats in a combo pack	Combo pack - Blu-ray/DVD OR Combo pack - 4K Blu-ray/Blu-ray OR Combo pack - Blu-ray 3D/Blu-ray	~~BLANK~~ ~~Combo pack~~ ~~Blu-ray/DVD~~ ~~4K/Blu-ray~~
Multiple formats AND multiple discs split by format and discs where discs are numbered. Example: An 8-disc release of a single tv series season where the show is repeated on 4 discs in two formats at a library that does not circulate full sets.	Disc 1-2 - 4K Blu-ray AND Disc 3-4 - 4K Blu-ray AND Disc 1-2 - Blu-ray AND Disc 3-4 - Blu-ray	~~BLANK~~ ~~Disc 1-2~~

Scenario	Do Use	Do Not Use

Multiple formats and mixed disc counts split by format where some discs are numbered, e.g. a special edition combo pack with 2 DVDs and 1 Blu-ray.	Disc 1 - DVD
	                    AND
	Disc 2 - DVD
	                    AND
	Blu-ray
	                    OR
	All discs - DVD
	                    AND
	Blu-ray
		~~BLANK~~
		~~Disc 1~~
		~~Disc 2~~
		~~DVD~~
		~~All discs~~
		~~Combo pack~~

If discs are unnumbered, but belong to an ordered series, include a preface such as "Film 1" so the list will sort in order.	Film 2, Insurgent - DVD	~~Insurgent~~ ~~Divergent series #2~~

If discs in a multi-disc set are unnumbered and do not belong in an ordered series, use the disc title in the part.	Bonus content - Blu-ray
	                    AND/OR
	Feature film - DVD
	                    OR
	[Match the title of the disc]
		~~BLANK~~
		~~Disc 6~~

If discs in a multi-film collection have titles, are unnumbered, and do not belong in an ordered series, simply list the titles.		
E.g., a film from the Marilyn Monroe Collection	Some like it hot - Blu-ray	~~Marilyn Monroe Collection #2~~

For single season TV boxsets, list only the discs and format. Do not include the season.	All discs - DVD
	                    OR
	Disc 1-2 - Blu-ray
	                    OR
	Disc 3 - 4K Blu-ray
		~~Season One~~
		~~Season 2, All discs - DVD~~

Scenario	Do Use	Do Not Use
For multi-season TV collections, where the collection is broken out into separate packages, list the season and included discs before the format.	Season 1, All discs - Blu-ray OR Season 1, Disc 1-2 - Blu-ray OR Season 3, Disc 1 - DVD	~~Season 1~~ ~~Discs 1-12~~
For multi-season TV collections, where multiple complete seasons are packaged together, list the range of seasons in each case.	Season 1-3, All discs - DVD	~~BLANK~~ ~~Seasons 1, 2 & 3~~ ~~All discs, season 1-3~~
For multi-season or multi-part TV sets with named parts breaking up seasons, list the part and provide an explanation of the contents in a 500 note.	Season 6, Part I - Blu-ray AND 500 ‡a Season 6, Part I contains episodes 1-12 on 4 discs. Season 6, Part II contains episodes 13-22 on 3 discs.	~~BLANK~~ ~~Part one~~
For multi-season TV sets with named parts breaking up seasons which are further separated, list the part, add disc numbers, and provide an explanation of the contents in a 500 note.	Season 6, Part I, Disc 1-2 - DVD AND 500 ‡a Season 6, Part I contains episodes 1-12 on 4 discs. Season 6, Part II contains episodes 13-22 on 3 discs.	~~BLANK~~ ~~Part one~~

Using Monograph Parts for Items with Multiple Formats

Occasionally, the item in hand will consist of more than one type of format. Examples of this include a book with an accompanying CD; an audiobook with a bonus DVD; a music CD with a concert DVD; and a DVD with a soundtrack music CD. If a library chooses to circulate the different components of the item separately and so assigns a barcode to each piece of the item, monograph parts should be created and assigned. In this situation, the creator of the parts should email all libraries with holdings on the record to request that they assign parts to their items, so that holds will work properly.

For consistency, proper sorting, and to avoid duplicate monograph part names, please apply the following rules and scenarios for naming monograph parts. Please note that when both formats are used in a part name, the primary format (See Items Containing Multiple Formats.) should be listed first in the part name.

Rule/Scenario	Do Use	Do Not Use
DVD disc(s) with music CD	All discs - DVD/CD	~~DVD & CD~~
Blu-ray disc(s) with music CD	All discs - Blu-ray/CD	~~Blu-ray with CD~~
DVD disc only	DVD	~~DVD only~~ ~~dvd~~
Blu-ray disc only	Blu-ray	~~Blu-ray only~~
Music CD only	CD	~~Music CD~~ ~~cd~~
Music CD(s) with DVD	All discs - CD/DVD	~~CD + DVD~~
Book with music CD	Book/CD	~~Book and CD~~
Book with CD-ROM	Book/CD-ROM	~~Book and CD-ROM~~
Book with DVD	Book/DVD	~~Book with DVD~~
Book only	Book	~~Book only~~ ~~book~~
CD-ROM only	CD-ROM	~~CD-ROM only~~

If the item in hand is not described by any of the examples in this Procedures Guide, please create logical part names for the components of the item.

Creating and Editing MARC Records

Coordinated Cataloging

We are working in a collaborative environment with fully shared bibliographic records. To that end, we observe shared local expectations of bibliographic record content and management thereof by Cat1 catalogers.

Certified Cataloger/Cat1 workflow

1. Search Evergreen Indiana for matching records, using the criteria outlined in Bibliographic Matching Guidelines. If a suitable record is found, attach holdings. The record may require improvements or edits to bring it up to standards and/or add matchpoints.
2. If no matching Evergreen record is found, search another source via Z39.50 (OCLC, WorldCat, Library of Congress, etc.). If a suitable match is found, import the record, edit if needed, and attach holdings.
3. If no record is found via Z39.50 or through sources available for batch import, use a MARC template to create a record in Evergreen Indiana and attach holdings to this record.

Subsequent libraries may also attach their holdings to the record or may look for a newer or more complete bibliographic record to overlay via Z30.50 (i.e., OCLC, WorldCat, Library of Congress, etc.). A record may be overlaid if all matching points are correct. Please enhance and/or upgrade Evergreen records and correct errors whenever encountered.

If you have never done original cataloging, please consider taking a course in creating MARC records. Also feel free to contact your library's Cataloging Committee point person and/or consult the Evergreen Indiana Cataloging listserv for assistance, if needed.

Duplicate records

It is the responsibility of every Evergreen Indiana Certified Cataloger to maintain an accurate, complete, and user-friendly database. Duplicate records in the database are to be avoided and corrected when found. Take care not to import duplicate records into the EI database. If duplicates are found, carefully merge them as time allows. See Bibliographic Matching Guidelines of this Procedures Guide for a discussion of matching points and refer to the EI Cataloging Manual for instructions on how to merge records.

Mismerge etiquette

When dealing with record mismerges in Evergreen, please observe the following guidelines:

- Regularly check your email and monitor the Evergreen Indiana Cataloging Listserv for information about mismerges. If a mismerge affects your holdings, please make corrections as soon as possible. Failure to correct catalog mistakes adversely affects your library, its staff and patrons, and the consortium as a whole. It can also lead to a revocation of cataloging privileges.
- If you encounter a mismerge and it only affects a small amount of libraries, please use the EI Cataloging Contact List to contact those libraries directly instead of sending a message to the listserv. The Contact List is periodically updated and currently can be located on Google Drive at the following url: https://docs.google.com/spreadsheets/d/1CH2ot2nyYZqs0oTG3Wy9lPa-3XNJ43JSFAIcEkomZ70/edit?usp=sharing
- When you identify a mismerge, check to see if the mismerge was caused by duplicate ISBNs or UPCs in the record. Delete any unique identifiers that are not relevant to the format you have in hand. If you determine that you have a situation in which two different records share duplicate ISBNs or UPCs, remember to code one of them with a ‡z per the instructions in Duplicate ISBNs and UPCs.
- If the mismerge involves different formats for the same title, look at the consortium holdings to determine which format is most affected by the mismerge. For example, if both the print and audiobook versions of a title have been mismerged to an audiobook record but you can tell by the holdings information that the vast majority of items attached to the record are for the print version, update the record to match the print version and alert the libraries with audiobook holdings (either by listserv or individually) that they should transfer their holdings to a new record.
- If you encounter a mismerge within a month of either a migration or having the deduplication script run against the catalog, it is possible for the item to be un-merged. You may submit a Helpdesk ticket with information about the record to have it un-merged.

Acceptable Records

As a Certified Cataloger, you may create temporary and permanent records. Records are expected to fully comply with minimum cataloging levels or in the case of special records, conform to the full requirements provided in the sections below.

RDA vs. AACR2

While catalogers are encouraged to create and import records that conform to RDA practices, it does not necessarily follow that an RDA record is always preferable to one cataloged according to the older AACR2 rules. When evaluating records, it is recommended that the cataloger choose the more robust record regardless of which cataloging standard was used. Therefore, an AACR2 record which contains content and summary fields, series information and/or other descriptive information is more valuable than an RDA record which lacks these elements. Catalogers are encouraged to enhance RDA records with such data elements when time permits, but it is acceptable simply to use an AACR2 record instead.

While it is permissible in Evergreen to overlay an RDA record with a more robust AACR2 record, catalogers should never downgrade an RDA record to AACR2 except through the overlay process and only in the case of substantial improvement of the record. Removing RDA elements from records for no other reason than to make the record conform to older standards is not acceptable.

Note: AACR2 records do not contain elements necessary for fully expressive icon display. If you are cataloging media materials, RDA records are strongly recommended.

Transcription in RDA records

RDA cataloging follows the principle of "Take what you see and accept what you get." This means you should transcribe exactly what is found on the resource, and accept copy in records as supplied. However, in many instances RDA gives a range of options in how fully to record information, and also allows for establishing local guidelines. This means we may find that records will reflect a variety of cataloging practices and still fall within the rules. In Evergreen Indiana we will take the general principle of accepting what is found in copy cataloging records, but catalogers are encouraged to exercise the option to add information that will expand access. Specific local practices are explained within relevant sections below.

Requirements for a core level bibliographic record (ELvL = 7)

Evergreen Indiana catalogers are encouraged to create or enhance all permanent records to the full-level Encoding Level. Encoding Levels are explained in OCLC Bibliographic Formats & Standards:
https://www.oclc.org/bibformats/en/onlinecataloging.html

Element	*Core-Level*
Fixed field	Code fully on every record
020/022/028	Field 020/022/028 subfield ‡a if present on item
024	Field 024 subfield ‡a if present on item
042	Include if PCC participant
050, 082, 086, etc.	One number from a recognized scheme
1XX	Include/establish if applicable.
240	Include if known or readily inferred from item
245–3XX	Include all applicable elements
4XX	Transcribe series if present
5XX	Enter the following notes if applicable: Field 500 Field 502 Field 505 Field 508 Field 533 Field 538
6XX	At least 1 or 2 subject headings at appropriate level of specificity from a Library of Congress established thesaurus or subject heading system
7XX	Express primary added entry relationships and important title access information
8XX	If series is traced

Permanent record requirements

Any record that is intended to be a permanent record in Evergreen Indiana must:

- Follow the bibliographic matching criteria outlined in [Bibliographic Matching Guidelines](#) of the Procedures Guide
- Not duplicate an existing Evergreen record
- Be in MARC 21 Format for Bibliographic Data
- Comply with RDA or AACR2 cataloging rules as well as the Library of Congress Rule Interpretations (LCRI)
- ISBD punctuation should be used in both RDA or AACR2 records
- Contain core level fields as defined by Library of Congress's Bib Standard Record (BSR), as described above, including, where applicable, ISBN or ISSN, title, edition, publisher, and date as well as record type (leader byte 6/Type code in fixed fields)
- Contain only bibliographic-level data, not information specific to one library's holdings
- Contain at least one LCSH subject heading

Uploading Cover Art

The addition of the **cover art uploader** to the Evergreen Indiana staff catalog gives library staff with Cat1 permissions and the appropriate training the ability to add or replace the image that appears, as part of the bibliographic record, in the staff catalog record summary, search results in the staff catalog and OPAC, and the individual OPAC record page. When adding or replacing images, staff should take special consideration to file size and type. Additionally, if staff are replacing an image, staff should consider some additional things. Instructions for using the Cover Art Uploader are [available here](#).

Aspect Ratio

The aspect ratio describes the proportions for an image. For example, an image that is 450 pixels wide and 600 pixels tall has an aspect ratio of 3:4. Because of the different places that cover art displays, it was recommended that the image used have an aspect ratio of between 5:8 and 3:4. (A useful tool - https://calculateaspectratio.com/)

File Size

The Evergreen Indiana default maximum file size for image files is 500 kilobytes.

Acceptable File Types

Files types that can be uploaded as cover art are:
- **JPEG (.jpeg, .jpg, .JPG)**
  Generally smaller file size but display quality degenerates as images are resized.
- **PNG (.png, .PNG)**
  Generally larger file size but display quality scales without loss of information. Can produce, however, grainy smaller images.
- **GIF (.gif, .GIF)**
  Variable file size dependent on image color map. Tend to have less color complexity and unexpected results when resized.
- **BMP (.bmp, .BMP)**
  Older file type that is discouraged but acceptable.

Replacing Cover Art

Cover art should only be replaced if the image displaying is for another thing completely or very low quality. For example, the cover for a book displays on the record of another book with another title and/or author. Images that display with the correct title and author but do not correspond with the exact same image on the item in hand should not be replaced.

Special Types of Records

Temporary records

If a record will remain in the database for a short period of time and no suitable record is found in Evergreen, you may import or create a temporary record.

Examples of temporary records are:
- On-order records
- Locally assembled kits used for a summer reading program
- Vertical files or informational binders associated with a community event

Not all the components required for permanent records are needed for a temporary record. However, if possible, please include the following fields:
- 010
- 020
- 022
- 1XX
- 245
- 250
- 264
- 300

Additionally, please code the record correctly to indicate the format of the item.

On-Order records

Evergreen libraries have the option to add new titles to the catalog as soon as they are ordered. This enables patrons to place holds on the titles before they are received.

If there is already a record in Evergreen for the item ordered, attach your holding. When the title is received, compare the record to the item in hand to make sure it is a match. To attach an on-order holding, either assign a barcode to the ordered item or create a unique number to use as a temporary barcode, such as the ISBN number + your library's shortname.

If no record is found, either import a matching record or use a MARC template to create a temporary record. The record you import or create is considered an on-order record because you do not have enough information available to review all required fields.

Guidelines for on-order records

On-order records should contain a minimum of the author, title, ISBN or standard number and the edition fields, if available.

A 599 field may be added to all imported and created on-order records; use all capital letters to distinguish this note:

> 599 __ ‡a ON ORDER RECORD

When the item is received, upgrade the on-order record so it meets Evergreen standards for permanent records and delete the 599 field if present.

Check for and merge any duplicate records. When On Order records are very brief, other catalogers may not be able to determine whether a record is a match for their item, so you may find that a duplicate record for your on-order item has been imported.

NOTE: Even if you are not the cataloger who created the on-order record, please upgrade the record and delete the 599 field (when present) if you attach a holding and have the item in hand. If the ISBN in an On Order record matches your item, in most cases you should update the record even if the other information is not consistent, because the information from an item in hand is more accurate than pre-publication information.

Other temporary records (not on-order records)

Temporary records other than on-order records may only remain in the system for 90 days. Please keep track of temporary records and remove them from Evergreen when no longer needed.

A 599 field should be added to all imported and created temporary records; use all capital letters to distinguish this note:

> 599 __ ‡a TEMPORARY RECORD

Adding a six month hold protection to the items on a temporary record will prevent other libraries from placing holds on temporary items.

Records for locally created resources

Records may be created for items created or compiled at your library using the appropriate MARC template. Locally created resources include:

- Kits of various learning materials put together for circulation to parents and teachers
- Vertical files of pamphlets or newspaper clippings about local buildings, families, or community events

The field requirements for permanent records do not apply to these types of resources, but please include as much information as possible. At least one Library of Congress Subject Heading (LCSH) is required.

Add a 599 field for vertical files: 599 __ ‡a VERTICAL FILE

Records for realia

Realia includes any three-dimensional object, artifact, replica or specimen.

- Realia examples include: Puzzles, board or yard games, puppets, sculptures, cake pans, historical and natural items, etc.
- Equipment: Library equipment that may or may not circulate such as hotspots, computers, die-cut machines, 3-d printers, etc.

The field requirements for permanent records do not apply to these types of resources, but please include as much information as possible in the appropriate fields. At least one Library of Congress Subject Heading (LCSH) is required.
Catalogers may create records for library equipment. Equipment should not be set to "OPAC visible" unless the equipment is available to circulate.

For commercially available items, including equipment, do not include locally specific information in the catalog record. These records are shared records like any other, and catalogers should attach holdings to existing records when appropriate.

Remote access records (Downloadable audiobooks, e-books, etc.)

The Evergreen Indiana consortium autoloads some remote access content records. Currently, that includes records for OverDrive (for the IDL member libraries), Hoopla, Kanopy, and the GPO. If your library offers other local remote access resources, it is each library's decision as to whether or not they will add records to Evergreen for these types of items. If local records are added, the library should add a ‡9 to the 856 tag to prevent the item from showing up in searches at other libraries.

All remote access records in Evergreen require an 856 field. Two subfields are particularly important and required in Evergreen:

- Subfield y alerts the patron that the item is downloadable and may be available only to certain patrons.
- Subfield 9 contains your library's Evergreen location code (shortname) and will restrict search and display of entirely electronic records (i.e. those with no holdings) to the location named. In other words, even though your library has no actual

holding on the record, it will only show up in search results when patrons perform a search that is limited to their home library.

Records may contain multiple 856 ‡9 entries with different library-specific information. When your patrons perform a search that is limited to their home library, the Evergreen location code in the 856 ‡9 will allow the search results to include that MARC record.

Example:
    856 40 ‡u http://cidc.lib.overdrive.com/ContentDetails.htm?ID=
        F750E2CA-2D38-4CC8-A74D-0517751CD2C9 ‡9 EG-IN
        ‡y eIndiana Digital Consortium: click here for access

    856 40 ‡u http://courses.gale.com ‡9 CNSRT ‡y Click here for Consortium Collection
        patron access

For more information on encoding the 856 field and how it is viewed in the OPAC, please see the section on 856 Electronic location and access.

Records for advance reader copies

An advance reader copy (ARC) of a book is sometimes distributed to reviewers, bookstores, and magazines three or six months before the book is officially released. The text of an ARC often differs from the final version of the book.

Do not attach an ARC to the bib record for the finished version of a published work. If a bib record for the ARC is not found in Evergreen, one must be imported or (most likely) an original record created using a MARC template.

The ARC may have a different title, pagination, contents or references which must be reflected in the record. All records for advance reader copies should have the following 250 edition statement:

    250 __ ‡a [Advance reader copy].

To prevent the record from merging with the published version, put the ISBNs in a 020 field under subfield "z".

    020 __ ‡z 9781234567890

Any street date restriction for the published version of an item applies to the ARC. No ARC should be available in Evergreen prior to the release date of the published version.

CIP (Cataloging-in-Publication) records

CIP-level records have been created by the Library of Congress from galley proofs sent to them by the publishers before the book is published. CIP records are created without published pieces in hand. This means that bibliographic information may not be accurate or present.

CIP records can be identified by the "8" in the Encoding Level (ELvl) fixed field, the presence of a 263 field, and a 300 field void of data.

The first cataloger who adds holdings to a CIP record should compare the item in hand with the record and edit accordingly.

Variable fields to check carefully on a CIP record:

- 245: There may be subtle differences that can be easily overlooked.
- Subtitles may be entirely different or nonexistent. Check the order of the authors in the statement of responsibility. Remember changes here affect the 100 and 700 fields.
- 263: This field should be deleted from the record. It is the projected publication date, so it is no longer needed.
- 300: The pagination, illustration, and dimension information will need to be added.
- 250: Add or remove edition information as necessary.
- 490: Add series information, if applicable.
- 504: Add pagination for bibliographic references, if applicable.
- 505: Check contents listed, if applicable.

Fixed fields to check carefully on a CIP record:

- Illustration (Ills): Information added to the 300 field must be coded in this field
- Encoding Level (ELvl): Replace the "8" with a "7" ("K" has been deprecated by OCLC) or made blank if "I" would have been previously chosen ("I" has been deprecated by OCLC) to reflect the new level of cataloging.

Guidance for Specific Materials

Books and periodicals

Paperback and hardcover books on the same record

You may attach a paperback item to a record for a hardback and vice versa even if the dimensions (centimeters given in 300 ‡c) are different IF this is the only other variation. Trade paperbacks are often able to share records with hardcover books. The publisher, publication date, and pagination must all still match. If a paperback item has an edition statement that does not indicate updates aside from binding, then it may be considered a match for a hardcover edition statement that is of a consistent numeration or description, i.e. 1st trade paperback edition may be considered a potential match with a 1st edition hardcover, but not the revised 2nd edition hardcover. Mass-market paperbacks seldom can be attached to a record for a hardcover item due to variations in publication date and pagination.

Be sure to add the ISBN for your item to the record if it is not already present. Use ‡q in the 020 to specify the qualifying characteristics of an added ISBN.

Example

> 020 __ ‡a 978012345678 ‡q (hardcover)
> 020 __ ‡a 978012876543 ‡q (trade paper)
> 020 __ ‡a 978014725836 ‡q (rebind)

See also: Paperback and hardcover books on the same record

Large print books

A correct MARC record in Evergreen Indiana for a large print book contains the following elements:
- A 'd' in the Form fixed field (used for filtered searching)
- The words 'large print' in parentheses following the pagination in the 300 field
- A 340 ‡n of "large print" in RDA records
- A genre heading of "Large print books" in a 655 field is preferred.

Example:

> Form fixed field = d
> 245 10 ‡a Skeleton Hill / ‡c Peter Lovesey.
> 300 __ ‡a 573 pages (large print) ; ‡c 23 cm
> 340 __ ‡n large print ‡2 rdafs
> 655 _7 ‡a Large print books. ‡2 lcgft

In Evergreen, a general material designation (GMD) for large print is never used. If you find a GMD for large print in a 245 field, please delete it.

If the item in hand states "large print version" or "large print edition", add an edition statement in a 250 field, transcribed as it appears on the item:

> 250 __ ‡a Large print edition.

Be sure to check the 020 fields to make sure the regular print ISBNs are not present on your large print record. Delete any ISBNs for regular print editions from large print records, and vice versa.

"Larger print" books

Items self-described as "larger print" should not be coded as Large Print in the Evergreen catalog, unless the font size meets the minimum of 14pt in accordance with the standard guidelines set by the National Library Service for the Blind and Physically Handicapped. The font size of these materials often does not meet those standards. If the font is too small, there should be no "d" coded in the Form field. The term "Larger print" may be transcribed to a 500 field.

Translations

In RDA records, there are several possible ways to express relationships between different expressions of a work. Using a 7XX field with a subfield i to explain the relationship as shown below is the preferred way for Evergreen Indiana,

> 240 10 ‡a Flickan som lekte med elden. ‡l English
> 245 14 ‡a The girl who played with fire / ‡c Stieg Larsson ;
> translated from the Swedish by Reg Keeland.
> 700 1_ ‡i Translation of: ‡a Larsson, Stieg, ‡d 1954-2004.
>   ‡t Flickan som lekte med elden.

However, other ways such as the use of a 500 note field or a 765 field may be accepted when found in copy cataloging.

Print resources with multiple volumes or parts

A single bibliographic record should be used for resources containing multiple volumes or parts. Examples would be a set of encyclopedias, a monograph series, or collected literary works, each volume with its own separate barcode.

If these items circulate, you should create and assign Monographic Parts to each item so holds may be placed by patrons at the part level. See **Managing Monographic Parts in the Evergreen Cataloging Manual** for instructions on how to do this.

When volumes are published separately, and may also be cataloged separately, ISBNs and UPC numbers for all individual volumes should be entered in a subfield z on the record for the set.

Omnibus print resources

Popular titles may be re-released as collections in a single binding. There are multiple tags which may be affected as a result.

505/7X0

Please include a 505 with titles of the included materials. Enhanced 505s, with separate ‡t subfields for each title are preferred for searching purposes. You may also add 7X0 title fields.

       =245 10 ‡a On the run /‡c Gordon Korman.
       =505 00 ‡t Chasing the falconers -- ‡t Fugitive factor -- ‡t Now you see them,
              now you don't.
       =740 02 ‡t Chasing the falconers.
       =740 42 ‡t The fugitive factor.
       =740 02 ‡t Now you see them, now you don't.

490/8XX

A separate 490/8XX may be created for each element in the collection if the collected materials are part of a collection; use a ‡3 to denote which entry is associated with each title.

       =245 00 ‡a On the run /‡c Gordon Korman.
       =490 1_ ‡3 Chasing the falconers ‡a On the run ; ‡v Book 1
       =490 1_ ‡3 The fugitive factor ‡a On the run ; ‡v Book 2
       =490 1_ ‡3 Now you see them, now you don't ‡a On the run ; ‡v Book 3
       =800 1_ ‡3 Chasing the falconers ‡a Korman, Gordon. ‡t On the run ; ‡v 01.
       =800 1_ ‡3 The fugitive factor ‡a Korman, Gordon. ‡t On the run ; ‡v 02.

=800 1_ ‡3 Now you see them, now you don't ‡a Korman, Gordon.
　　　　‡t On the run ; ‡v 03.

521/526

Create reading level and reading program entries for each title included in the collection and use a ‡3 for the 521 and a ‡i for the 526 to identify which entry applies to which title in the collection.

=245 00 ‡a On the run /‡c Gordon Korman.
=521 8_ ‡3 Chasing the falconers ‡a 680L ‡b Lexile.
=521 8_ ‡3 The fugitive factor ‡a 760L ‡b Lexile.
=521 8_ ‡3 Now you see them, now you don't ‡a 740L ‡b Lexile.
=526 0_ ‡i Chasing the falconers : ‡a Accelerated Reader AR ‡b MG ‡c 4.9
　　　　‡d 4.0 ‡z 86639.
=526 0_ ‡i The fugitive factor : ‡a Accelerated Reader AR ‡b MG ‡c 5.1
　　　　‡d 4.0 ‡z 88919.
=526 0_ ‡i Now you see them, now you don't : ‡a Accelerated Reader AR
　　　　‡b MG ‡c 4.9 ‡d 4.0 ‡z 100020.

Monographs cataloged as serials

Monographs may be cataloged as serials if appropriate. For example, many travel guides and reference books come out on a yearly basis. Individual circulating items on a serials record should be assigned a Monograph Part so they are holdable by patrons at the part level.

Periodicals

Magazines, newspapers, and monthly comic books are added to serial records because they are a continuing resource. (Serial records have a Blvl code of 's') In most cases, all your library's issues of a particular publication should be added to the same serial record. Do not create new bibliographic records for individual years. Do not import or create a separate record for each new issue of the same title.

Use of monograph parts is heavily encouraged with periodicals. Please see Using Monograph Parts for Magazine Issues for guidance on how to create parts.

Video recordings (DVD, Blu-Ray, 4K UHD Blu-Ray, VHS)

A good source of RDA cataloging information for videodiscs is the guide produced by Online Audiovisual Catalogers, Inc., available for free in PDF format at: http://www.olacinc.org/sites/default/files/DVD_Blu-ray-RDA-Guide-Version-1-1-final-aug2018-rev-1.pdf

Keeping different media formats on separate records

Although the content may be the same, media on different formats belong on separate records. By following the matching guidelines provided, you will not accidentally combine media formats on the same record incorrectly.

- Videocassettes and videodiscs should never be attached to the same record.

- Since Blu-ray, Blu-ray 3D, and 4K UHD Blu-ray discs require special equipment to view and are formatted differently than a DVD and each other, each of these formats also should be cataloged separately *if they are not part of a combo pack record or matches for materials described on a combo pack record*.

- Videodiscs sold in combo packs and those individually sold materials matching the videodiscs found in combo packs should be cataloged on the same record.

Rental editions of videodiscs

Rental editions of videodiscs may be added to a record for either a combo pack or individually released non-rental edition records if all the content matches. Catalogers should pay close attention to special features and language options in determining whether a new record is needed. If the content is identical, catalogers may add their item and include information unique to their item such as ISBN, UPC and/or publisher number to the existing record. For ISBN or UPC fields, catalogers should indicate that the information was taken from a rental edition by including a qualifying information subfield:

> 020 __ ‡a 9780061435164 ‡q (rental edition)

Retain the edition statement if it is already present in the record, even if it does not match your item.

Matching 028 Fields

The 028 field in a MARC record displays the publisher number for video and sound recordings as well as some printed music. It's a useful field when trying to decide if the record matches your item.

However, if everything else in the record, including the UPC and/or ISBN, matches your item, you can still attach your holding even if the 028 field does not match the publisher number on your material.

If you do attach an item with a different publisher number, be sure to add another 028 field to reflect this information.

Sample 028 (Publisher number) fields:

028 42 ‡a 019708 ‡b Walt Disney Home Video
028 42 ‡a 89443 ‡b Paramount Home Entertainment
028 02 ‡a 8368-CD ‡b Books on Tape
028 02 ‡a CK 85098 ‡b Columbia

Foreign language videos and DVDs

Include both the English and foreign language titles in the 245 field when cataloging foreign language films.

- Transcribe the title as it appears on the item or container in the 245 ‡a field. This may or may not be the English version of the title. If the title appears in both languages, pick the one the film is most commonly known by. When in doubt, select the English title.
- Add the translation in the 245 ‡b field as a parallel title. Unlike for a subtitle, the punctuation preceding the 'b' is an equal sign (=).
- Repeat the parallel title in a 246 field.
- Add a 588 note indicating the source of both titles.

Examples:
245 04 ‡a The Pope's toilet = ‡b El baño del papa / ‡c Film
            Movement, Bavaria Film International,…
246 30 ‡a El baño del papa
588 0_ ‡a Title and parallel title from container.

245 04 ‡a Chocolat = ‡b Chocolate / ‡c Miramax Films ;
            produced by David Brown…
246 30 ‡a Chocolate
588 0_ ‡a Title and parallel title from container.

If the English version of the title does not appear on the item or container, you can still add it as a parallel title, but put it in brackets [ ].

245 00 ‡a Tsotsi = ‡b [Thug] / ‡c Miramax Films presents…

51

NOTE: Subfield 'b' is not repeatable. If there is other title information that belongs in ‡b, add this after the title proper or parallel title to which it belongs. Watch punctuation.

> 245 00 ‡a Title 1 : ‡b Other title information
> for Title 1 = Title 2 : Other title information for Title 2 /
> ‡c Statement of Responsibility.

Videodisc formats

Combo packs

Publishers commonly package titles in sets that include multiple disc formats. The combo pack record should be treated like a kit with full bibliographic descriptions of each element where it is unique on the record, including equipment requirements. Repeat fields with qualifiers (typically ‡q or ‡3) as needed where each format is unique and the field is repeatable.

Example collective combo pack record (excerpted):
        =007 vd\csaizk
        =007 vd\cvaizq
                                    [...]
        =024 1\ ‡a 786936815139 ‡q (Blu-ray/DVD combo pack)
        =024 10 ‡a 786936812428 ‡q (DVD)
        =028 42 ‡a 107428 ‡b Buena Vista ‡q (Blu-ray/DVD combo pack container)
        =028 42 ‡a 106666 ‡b Buena Vista ‡q (DVD container)
        =028 42 ‡a 8020957 ‡b Buena Vista ‡q (Blu-ray disc)
        =028 42 ‡a 8020956 ‡b Buena Vista ‡q (DVD disc)
                                    [...]
        =245 14 ‡a The lion king / ‡c Walt Disney Pictures presents ; directed by Roger Allers
                and Rob Minkoff ; produced by Don Hahn ; screenplay by Irene Mecchi
                and Jonathan Roberts and Linda Woolverton ; songs by Tim Rice and
                Elton John ; original score composed and arranged by Hans Zimmer.
        =250 __ ‡a Diamond edition.
                                    [...]
        =300 __ ‡3 Blu-ray : ‡a 1 videodisc (approximately 88 min.) : ‡b sound, color ; ‡c 12
                cm
        =300 __ ‡3 DVD : ‡a 1 videodisc (approximately 88 min.) : ‡b sound, color ; ‡c 12 cm
                                    [...]
        =344 __ ‡3 Blu-ray ‡h DTS Master audio 7.1 ‡h 5.1 DEHT
        =344 __ ‡3 DVD ‡h 5.1 DEHT
                                    [...]
        =347 __ ‡a video file ‡2 rdaft

=347 __ ‡b Blu-ray
=347 __ ‡3 Blu-ray ‡e Region A B C ‡2 rdare
=347 __ ‡b DVD
=347 __ ‡3 DVD ‡e Region 1 ‡2 rdare

[...]

=538 __ ‡a Blu-ray, Regions A, B, C, 1080p high definition, widescreen (1.78:1) presentation; DTS Master audio 7.1, 5.1 Disney enhanced home theater mix ; requires Blu-ray player.
=538 __ ‡a DVD, Region 1, NTSC, widescreen (1.78:1) presentation ; 5.1 Disney enhanced home theater mix.
=546 __ ‡a In English, with optional French or Spanish audio tracks; with optional subtitles in French or Spanish; English for the deaf and hearing impaired.

[...]

=500 __ ‡a Blu-ray special features: 4 never-before-seen deleted scenes; bloopers; deleted song; "The morning report" : extended scene; "Pride of The lion king"; "The lion king: a memoir" [by] Don Hahn; Disney sing along mode; interactive Blu-ray gallery.
=500 __ ‡a DVD special features: "The lion king: a memoir" [by] Don Hahn.

If using a bibliographic record for the combo pack, you can either circulate individual discs together or repackage and circulate separately. If repackaged to circulate separately, catalogers may wish to use call numbers that will enable patrons and staff to identify which disc is which format if they are packaged separately for circulation. Monograph parts must be applied reflecting the final packaging.

Cataloging DVD format

While a DVD will play on a Blu-ray, 4K UHD Blu-ray, or Blu-ray 3D player, the reverse is not true. A separate record must be created for videorecordings released exclusively in DVD format and which are not part of or a match for elements on a combo pack record. Do not attach a holding for a videorecording on standard Blu-ray, 4K UHD Blu-ray, or Blu-ray 3D to a DVD only record.

So that DVD discs can be easily identified by Evergreen in the OPAC and present the correct icon, always add an 007, an edition statement in the 250 field on single format records, and a digital file type definition in the 347 field:

007   ‡e s
250 __ ‡a [Widescreen DVD version].
347 __ ‡b DVD

007   ‡e s

250 __ ‡a Special ed., [DVD version].
347 __ ‡b DVD

An easy way a cataloger can determine whether a record includes a DVD is by checking the 538 field(s) for matching equipment requirements and performance values:

DVD:
538 __ ‡a DVD disc; widescreen presentation; Dolby Digital.

Cataloging Blu-ray format

While a DVD will play on a Blu-ray player, the reverse is not true. Since Blu-ray discs require a special player and are formatted differently than DVDs, a separate record must be created for videorecordings released exclusively in Blu-ray format and which are not part of or a match for elements on a combo pack record. Do not attach a holding for a videorecording on DVD, 4K UHD Blu-ray, or Blu-ray 3D to a standard Blu-ray only record.

So that Blu-ray discs can be easily identified by Evergreen in the OPAC and present the correct icon, always add an 007, an edition statement in the 250 field on single format records, and a digital file type definition in the 347 field:

007   ‡e s
250 __ ‡a [Blu-ray version].
347 __ ‡b Blu-ray

007   ‡e s
250 __ ‡a Special ed., [Blu-ray version].
347 __ ‡b Blu-ray

An easy way a cataloger can determine whether a record includes a Blu-ray is by checking the 538 field(s) for matching equipment requirements and performance values:

Blu-ray:
538 __ ‡a Blu-ray disc; widescreen presentation; Dolby Digital,
1080p High Definition; requires Blu-ray player.

Cataloging 4K UHD Blu-Ray format

While a Blu-ray videodisc will play on a 4K Ultra High Definition (UHD) Blu-ray player, the reverse is not true. Since 4K UHD Blu-ray discs require a special player and television and are formatted differently than standard Blu-rays and DVDs, a separate record must be created for videorecordings released exclusively in 4K UHD Blu-ray format and which are

not part of a combo pack. Do not attach a holding for a movie on standard Blu-ray or DVD to a 4K UHD Blu-ray only record.

So that 4K UHD Blu-ray discs can be easily identified by Evergreen in the OPAC and present the correct icon, always add an 007, an edition statement in the 250 field on single format records, and a digital file type definition in the 347 field:

    007   ‡e s
    250 __ ‡a [4K UHD Blu-ray version].
    347 __ ‡b 4K UHD Blu-ray

    007   ‡e s
    250 __ ‡a Special ed., [4K UHD Blu-ray version].
    347 __ ‡b 4K UHD Blu-ray

An easy way a cataloger can determine whether a record includes a 4K UHD Blu-ray is by checking the 538 field(s) for matching equipment requirements and performance values:

    4K UHD Blu-ray:
        538 __ ‡a 4K Ultra HD Blu-ray disc; includes HDR (High Dynamic
            Range) audio; 2160p Ultra High Definition picture;
            requires 4K Blu-ray Player.

Cataloging Blu-ray 3D format

While a DVD or standard Blu-ray will play on a Blu-ray 3D player, the reverse is not true. Since Blu-ray 3D discs require a special player, viewing screen, and glasses, a separate record must be created for videorecordings released exclusively in Blu-ray 3D format and which are not part of or a match for elements on a combo pack record. Do not attach a holding for a videorecording on DVD, standard Blu-ray, or 4K UHD Blu-ray to a Blu-ray 3D only record. Note that it is unusual for Blu-ray 3D to be released outside of a combo pack, so exclusive Blu-ray 3D records are rare.

So that Blu-ray 3D discs can be easily identified by Evergreen in the OPAC and present the correct icon, always add an 007, an edition statement in the 250 field on single format records, and a digital file type definition in the 347 field:

    007   ‡e s
    250 __ ‡a [Blu-ray 3D version].
    347 __ ‡b Blu-ray 3D

    007   ‡e s

250 __ ‡a Special ed., [Blu-ray 3D version].
347 __ ‡b Blu-ray 3D

An easy way a cataloger can determine whether a record includes a Blu-ray is by checking the 538 field(s) for matching equipment requirements and performance values:

Blu-ray 3D:
538 __ ‡a Blu-ray 3D disc; widescreen presentation; Dolby Digital, 1080p High Definition; requires Blu-ray 3D player, 3D capable display and 3D glasses.

Audiobooks (Including Playaways and MP3 formats)

Keeping different media formats on separate records

Although the content may be the same, media on different formats belong on separate records. By following the matching guidelines provided, you will not accidentally combine media formats on the same record.

Playaways, MP3-CD audiobooks, CD audiobooks, and audiobooks on cassette should all be on separate records.

Audiobooks: library and regular (trade) editions

A trade edition for an audiobook may be attached to a record for a library edition if everything else on the record matches the item in hand. A library edition audiobook may likewise be attached to a record for a trade edition.

There is usually a more favorable replacement policy for library edition audiobooks, so it is recommended that item notes be used if you need to denote which edition your library owns.

If all other criteria match, be sure to add the ISBN and publisher number (028 field) to the record before attaching if not already present. Use a qualifying information subfield to indicate an ISBN of a library or trade edition.

Example:

020 __ ‡a 9780804148399 ‡q (library edition)

Playaways

Playaways are cataloged on the sound recording format. (The fixed field Type = 'i' if a nonmusical sound recording.)

The form element in the fixed field is recorded as "q" to indicate that the Playaway is a directly accessible tangible recording medium.

If following RDA standards, no General Material Designator (GMD) should be entered. The size in the 300 field is given in centimeters, not inches.

> 245 14 ‡a The red pyramid / ‡c Rick Riordan.
> 300 __ ‡a 1 audio media player (approximately 15 hr.) ‡b digital ; ‡c 9 x 6 cm

In RDA records, the remaining 3xx fields are used to enter digital and physical characteristics about the item.

> 336 __ ‡a spoken word ‡b spw ‡2 rdacontent
> 337 __ ‡a audio ‡b s ‡2 rdamedia
> 338 __ ‡a other ‡2 rdacarrier

The 344 field describes the sound characteristics of the playaway. Use separate 344 fields for each unique term.

> 344 __ ‡a digital ‡2 rdatr
> 344 __ ‡a non-volatile flash memory ‡2 rdarm

The 347 field (Digital File Characteristics) is a locally defined entry that the Evergreen Indiana consortium has chosen to use for Playaway records.

> 347 __ ‡b Playaway

Information about the batteries and the earphones belongs in a 500 field and not in the 300 field.

> 500 __ ‡a Earphones and one AAA battery required.

There is always a 655 field for Audiobooks in the MARC record.

> 655 _7 ‡a Audiobooks. ‡2 lcgft

The statement on whether the Playaway is abridged or unabridged belongs in a 500 note unless the words "version" or "edition" are used on the Playaway itself, in which case an edition statement should be included in the 250 field.

For more information on how to catalog Playaways, please refer to the following:
- Playaways and RDA: Summary of relevant sections from RDA Chapters 3, 6, and 7
- Guide to Material Type Icons
- RDA Registry (Value Vocabularies)

MP3-CD audiobooks

The bibliographic record for an MP3-CD audiobook is similar to one for a sound recording on a standard CD.

Both are cataloged on the sound recording format. The GMD in the 245 field of an AACR2 record is [sound recording]; no GMD is used in an RDA record. There should always be a 655 field indicating Audiobooks.

However, the 300, 347, 500 and 538 fields are different for an audiobook on MP3. In these fields the format is identified as MP3 and system requirements are explained. A second 655 field is added to further identify the record as an MP3 recording.

RDA example for an MP3-CD recording:

```
245 10 ‡a Cross roads / ‡c Fern Michaels.
300 __ ‡a 1 audio disc (8 hr., 59 min.) : ‡b digital, MP3 ; ‡c 12 cm
336 __ ‡a spoken word ‡b spw ‡2 rdacontent
337 __ ‡a audio ‡b s ‡2 rdamedia
338 __ ‡a audio disc ‡b sd ‡2 rdacarrier
344 __ ‡a digital ‡2 rdatr
344 __ ‡b optical ‡2 rdarm
344 __ ‡g stereo ‡2 rdap
347 __ ‡a audio file ‡2 rdaft
347 __ ‡b MP3
490 1_ ‡a Brilliance audio on MP3-CD
490 1_ ‡a Sisterhood ; ‡v book 18
500 __ ‡a Compact disc, MP3 format.
538 __ ‡a System requirements: CD/MP3 player, or PC with
        MP3-capable software.
655 _7 ‡a Audiobooks. ‡2 lcgft
655 _0 ‡a MP3 (Audio coding standard)
800 1_ ‡a Michaels, Fern. ‡t Sisterhood ; ‡v 18.
```

830 _0 ‡a Brilliance audio on MP3-CD.

NOTE: Because AACR2 does not have the necessary granularity for Evergreen to distinguish between a regular cd audiobook and an MP3 audiobook, it is highly recommended that only RDA records be used for MP3 materials.

Mixed Materials and Miscellaneous Formats

Items Containing Multiple Formats

Occasionally, the item in hand will consist of more than one type of format. Examples of this would be a book with an accompanying CD; an audiobook with a bonus DVD; a music CD with a concert DVD; and a DVD with a soundtrack music CD. When cataloging one of these types of items, decide which component is the primary material and then select a record that is based on that item. If the resource contains a book and some sort of media which seems to be of equal importance, consider the media as the primary material.

If both components are 4 3/4" discs, choose the primary material based on the type of packaging. For example, if the discs are packaged in a CD jewel case, consider the CD to be the primary material.

For example, a book with a CD pocketed in the back will be cataloged as a book. A book and sound recording packaged together in a 'hang-up bag' may be of equal importance, but in Evergreen it is cataloged as a sound recording.

Use subfield 'e' of the 300 field to indicate the additional component.

300 __ ‡a 1 audio disc : ‡b digital, stereo ; ‡c 12 cm + ‡e 1 book (32 pages : color illustrations ; 29 cm).

If a library chooses to circulate the different components separately and so assigns a barcode to each piece of the item, monograph parts should be created and assigned. (For monograph part naming conventions, please see Using Monograph Parts for Items with Multiple Formats.) In this situation, the creator of the parts should email all libraries with holdings on the record to request that they assign parts to their items, so that holds will work properly.

Playaway Launchpads

Playaway Launchpads are Android tablets from Findaway World that come with a themed set of pre-loaded educational apps. In Evergreen Indiana, a Launchpad should be

cataloged as realia (fixed field Type r) and should include 2 007 fields, one for realia and one for software.

Type: r
Realia 007: kz ci|
Software 007: cz cza---auuuu

The 300 field should describe the Launchpad itself and include a $e for standard accessories, as follows:

300 __ ‡a 1 tablet computer ; ‡c 20 x 13 x 2 cm + ‡e 1 USB cord
        + 1 AC adapter + 1 bumper + 1 portfolio case

Include the following fields when cataloging a Launchpad:

500 __ ‡a Issued on Playaway Launchpad, a pre-loaded learning
        Tablet.
538 __ ‡a System specifications: 7" high-definition touch screen;
        Android OS; external speaker; universal audio jack.
588 0_ ‡a Title from label.

It is recommended to include a 505 field to list the apps included on the Launchpad being described.

When cataloging a Launchpad in RDA, include the following fields and subfields:

336 __ $a computer program $b cop $2 rdacontent
337 __ $a computer $b c $2 rdamedia
338 __ $a other $b cz $2 rdacarrier

Audio-Enabled Books

Wonderbooks and VOX are products that have a pre-loaded audiobook player permanently attached to the print version of a title. In Evergreen Indiana, an audio-enabled book should be cataloged as language material (fixed field Type 'a') and should include 2 007 fields, one for direct electronic and one for sound recording.

Type: a
Form: q

Electronic Resource 007: cz nza
Sound Recording 007: sz zunznnnzned

Include the print edition's ISBN within a ‡z

=020 __‡a 9781094254814 ‡q (Wonderbook)

=020 __‡z 9781580897969 ‡q (Print)

Add "Wonderbook version" or "VOX version" to a 250 field. Add brackets if not located on the item.

=250 __‡a [Wonderbook version].
=250 __‡a [VOX version].

Use 'audio-enabled book' in the 300 field.

=300 __ ‡a 1 audio-enabled book (# pages or volume) : ‡b color illustrations ; ‡c 24 cm

When cataloging a Wonderbook or VOX book in RDA, include the following fields and subfields:

=336 __‡a spoken word ‡b spw ‡2 rdacontent
=336 __‡a text ‡b txt ‡2 rdacontent
=337 __‡a audio ‡b s ‡2 rdamedia
=337 __‡a unmediated ‡b n ‡2 rdamedia
=338 __‡a other ‡b sz ‡2 rdacarrier
=338 __‡a volume ‡b nc ‡2 rdacarrier
=344 __‡a digital ‡b non-volatiles flash memory ‡2 rda
=347 __‡a audio file ‡b MP3 ‡2 rda
=347 __‡b Wonderbook *OR* ‡b VOX audiobook

=347 __‡b Read-along book

The 347 field will supply the Read-along icon for the record.

Include the appropriate fields when cataloging an audio-enabled book:

=500 __ ‡a Print book published: [Insert location] : [Insert publisher], [Insert date].
=500 __ ‡a Audiobook originally released by [Insert publisher].
=500 __ ‡a Issued as a Wonderbook/VOX book, a pre-loaded audiobook player permanently attached to a hardcover book.
=500 __ ‡a Powered by a rechargeable battery; USB charger required for recharging.
=500 __‡a Audio playback device includes headphone jack, external speaker, play/pause button, volume controls, page-turning controls, rechargeable battery, and removable AC adapter.

Make sure that any other information is included:

> =500 __ ‡a Audiobook player has 2 modes. Read-Along mode narrates the story. Learning mode asks questions related to the story.

Duplicate ISBNs and UPCs (using subfield z)

Sometimes two Evergreen records will have matching 020 or 024 fields but the records themselves are not duplicates. These records may merge if an automated deduplication program is run, which means your item may end up on a completely wrong record. You can prevent automated mismerges by using a subfield 'z' in one of the records.

Record A: 020 __ ‡a 9780553349498
Record B: 020 __ ‡z 9780553349498
Record C: 024 1_ ‡a 883929242221
Record D: 024 1_ ‡z 883929242221

Any 020 or 024 field, subfield 'z' will be ignored by deduplication software. In the examples above, Record B would not merge with Record A or any other record with that ISBN, and Record D would not merge with Record C or any other record with that UPC.

Anytime there are two records sharing the same ISBN or UPC number, these records are either duplicates and need to be merged or they are for truly different items and one record needs to have the 020 or 024 subfield changed to prevent a mismerge.

If you are absolutely sure that a number is totally wrong and does not belong on the record, such as an ISBN for a large print version on a regular print record or an ISBN for an e-book if the record is for a physical printed item, then delete the field.

Guidelines

When 2 totally different items are issued with the same ISBN or UPC, check to see which picture is displaying in the OPAC. Use a subfield 'z' in the 020 or 024 field of the record that is displaying the wrong picture. If no picture displays, follow the guideline for multiple versions.

When there are multiple versions or editions sharing the same number, code the 020 or 024 of the record with the most holdings subfield 'a' and the rest subfield 'z'. If the holdings are equal, use subfield 'a' on the newer item.

If a children's book is packaged with an audiobook and cataloged as a non-musical sound recording, then the ISBN for the book component should be coded with a subfield 'z' in the 020 field. If cataloging a book with a DVD or CD inside and there is a 020 or 024 field for the disc, it should be coded with a subfield 'z'.

Guidance for Specific Fields in the MARC Record

Fixed fields

Fixed fields must be encoded according to MARC 21 standards. Accuracy is important because Evergreen relies on this data for search filters and icons displayed in the OPAC. The search filters will not work, and the incorrect icon will display if the fields are not encoded properly.

The Type (Type), Audience (Audn), Form (Form), Language (Lang), Literary form (LitF) and the first Date (Date1) fixed field elements are all tied into the Evergreen searching process so are especially important.

Free online resource for coding the fixed fields

The OCLC Bibliographic Formats and Standards website is an excellent resource for coding the fixed fields: http://www.oclc.org/us/en/bibformats/en/fixedfield. Click on a field abbreviation along the left side of the page to see a definition, description and examples for each field.

In Evergreen Indiana:
- Descriptive cataloging form (Desc) must be "a" for AACR2 records and "i" for RDA records
- Encoding level (ELvl) must be "7" level or higher ("K" has been deprecated by OCLC)
- The audience field (Audn) must be coded

Guidelines for coding the Audience field

Coding the Audience field is required in Evergreen Indiana. It is important for catalogers to use the same criteria for coding materials, so that search results using the Audience Search Filter will be reliable.

ƀ	Unknown or unspecified. A blank audience field indicates unknown or unspecified. The target audience for the item not known or not specified. *EI*: Unspecified (ƀ) should not be used.
a	Preschool. The item is intended for children, approximate ages 0–5 years. *EI*: Should be used for all board books and any other materials targeted at this age group.

b	Primary. The item is intended for children, approximate ages 6–8 years.
c	Pre-adolescent. The item is intended for young people, approximate ages 9–13 year. *EI*: Codes a, b, and c indicate specific age groups for children. Please use these if a target audience is indicated on the item. If no age or grade level is indicated, use of a, b, and c is optional, except for board books, and j may be used for juvenile materials.
d	Adolescent. The item is intended for young people, approximate ages 14–17 years. *EI*: This should be used for young adult/teen items.
e	Adult. The item is intended for adults. *EI*: This should be used for books and audiobooks in adult collections. Should also be used for Rated R and Unrated movies. Movies which are Not Rated, as opposed to Unrated, may be assigned an audience as appropriate. This code should also be used for music with adult language and content.
f	Specialized. The item is aimed at a particular audience and the nature of the presentation makes the item of little interest to other audiences. Examples include: ● Items which address a limited audience, e.g., the employees of a single organization. ● Technical software or sound recordings geared to a specialized audience. ● Training films intended for the special education of the physically or mentally handicapped.
g	General. The item is of general interest and not aimed at an audience of a particular intellectual level. Use for items that are not covered more appropriately by the other codes. *EI*: g is used for movies rated G, PG, and PG-13, though G or PG rated movies specifically aimed at children may be coded as j. Most music, unless aimed at a specific audience or containing adult material, will also get a designation of g.
j	Juvenile. The item is intended for children and young people, approximate ages 0–15 years. Use when a more specific code for the juvenile target audience is not desired. *EI*: Use for juvenile materials without a specific target age group.

Variable fields

Free online access to variable field information

Access variable field information easily online at the OCLC Bibliographic Formats and Standards website:

http://www.oclc.org/us/en/bibformats/default.htm

Click on a range of fields (6XX, 5XX, etc.) and then narrow the search using the list along the left side of the page.

020 ISBN

The ISBN (International Standard Book Number) is required if found on the item. Both the ISBN-10 and the ISBN-13 should be on the record if available.

Do not add price information to the record. Delete this information if already there. Price information may be added at the holding level in the Holdings Editor screen.

When importing records, remove any ISBNs that are clearly inappropriate. Watch for ISBNs for both print and electronic versions or both large print and regular print versions on the same record. ISBNs for electronic versions should be removed from bibliographic records for physical material.

For those libraries using OCLC, the OCLC software will create the 13-digit ISBN when the 10-digit ISBN is entered into the 020 field in the MARC record and vice versa. When the record is updated and saved, both ISBN numbers will be present.

Be sure to use qualifying information subfields to describe the material associated with the individual ISBNs whenever possible.

> 020 __ ‡a 9781452145402 ‡q (hardcover)
> 020 __ ‡a 1452145407 ‡q (hardcover)
>
> 020 __ ‡a 978-1440835803 ‡q (softcover)
> 020 __ ‡a 1440835802 ‡q (softcover)

See also Duplicate ISBNs & UPCs.

024 UPC

The UPC (Universal Product Code) is required if found on the item. Add qualifier subfields when appropriate to explain the inclusion of the UPC.

> 024 1_ ‡a 191329087206 ‡q (dvd)
> 024 1_ ‡z 191329091739 ‡q (Blu-ray/dvd combo pack)

See also Duplicate ISBNs & UPCs.

245 Title Entries

Capitalization in the Title Statement

In RDA records, for copy cataloging we can accept what is found in the 245, except when all capital letters are used for title statements. Change all caps to sentence case for readability. In Evergreen Indiana, for original cataloging we will use sentence case for title statements.

Works with multiple persons responsible for a resource

RDA gives the option to omit all but the first person listed on the resource and summarize the rest. In Evergreen Indiana you can accept what is found in the record, but catalogers are encouraged to include a full description in the 245 ‡c.

Reminder: GMDs (AACR2) are not used in bibliographic records following RDA rules.

250 Edition Statement

When a single bibliographic record is shared between formats that match based on the guidelines set in this procedures guide, the 250 edition statement may be repeated if both statements are present (see Variations in the edition statement).

Hardcover and Trade Paperbacks

> 250 __ First hardcover edition.
> 250 __ First trade paperback edition.

300 Physical description

Pagination

All numbered pages should be considered for the pagination count. Include numbered preliminary and end matter pages. Match the numeration styles found on the item.

300 _ _ ‡a xi, 150 pages :‡b color illustrations ;‡c 22 cm

For plates on unnumbered pages, include the plate count separately.

300 _ _ ‡a 150 pages, 24 unnumbered pages of plates :‡b illustrations, maps ;‡c 20 cm

For materials published without page numbers at all, preference is given to the use of "1 volume (unpaged)".

300 _ _ ‡a 1 volume (unpaged) :‡b color illustrations ;‡c 23 cm

For exceptions, see also [Variations in measurements: Books](#).

33X fields

For the 33x fields, use subfield a with the appropriate term. Subfield b with codes are optional, but recommended.

Resources that include multiple formats

For resources that include multiple formats, for instance a read-along set with a book and a CD, include 33X fields for each format.

Example:
300 __ ‡a 1 audio disc (23 minutes) :‡b stereo ;‡c 12 cm + ‡e 1 book (unpaged : color illustrations, 18 cm)
336 __ ‡a spoken word ‡b i ‡2 rdacontent
336 __ ‡a text ‡b txt ‡2 rdacontent
337 __ ‡a audio ‡b s ‡2 rdamedia
337 __ ‡a unmediated ‡b n ‡2 rdamedia
338 __ ‡a audio disc ‡b sd ‡2 rdacarrier
338 __ ‡a volume ‡b nc ‡2 rdacarrier

34X fields for media materials

341 and Accessibility entries

For the 341 fields, use subfield a with appropriate context entry for the primary context of the material, a subfield b with added textual accessibility features, a subfield c for added visual accessibility features, a subfield d for added auditory accessibility features, or a subfield e for added tactile accessibility features, and supply the subfield 2 source thesaurus. Add a separate tag for each context and feature type. These should only be used if supplementary accessibility features are available; the 341 is not for use to describe the primary access mode(s) exclusively. Corresponding entries should also be made in the

041 and 532 tags for the languages represented by the auditory and visual accessibility features.

The first indicator should be a 0 if the accessibility features reflect the primary material; it should be a 1 if they reflect the secondary materials, such as closed captioning on a "Making of" featurette.

Recommended 341 subfields (where applicable)

Subfield	Description	Example entries
‡a	Content access mode (Primary access mode)	auditory, tactile, textual, visual
‡b	Textual assistive features	captions, transcripts, alternativeText, longDescription
‡c	Visual assistive features	signLanguage
‡d	Auditory assistive features	audioDescription
‡e	Tactile assistive features	braille, tactileGraphic, tactileObject

The 341 was defined in fall 2018, and LoC recommends the W3C Accessibility Feature thesaurus for use with this field:

https://www.w3.org/community/reports/a11y-discov-vocab/CG-FINAL-vocabulary-20230306/#abstract

Examples:
    Item includes closed captions or SDH in English.
        041 0_ ‡p eng
        341 0_ ‡a auditory ‡b captions ‡2 w3c
        532 1_ ‡a Closed captioning in English.

    Item has included picture-in-picture of ASL translation.
        041 0_ ‡r sgn
        041 07 ‡a ase
        341 0_ ‡a auditory ‡c signLanguage ‡2 w3c
        532 1_ ‡a Picture-in-picture signing in ASL.

Item has Described Video feature for visually impaired users.

    041 0_ ‡q eng
    341 0_ ‡a visual ‡d audioDescriptions ‡2 w3c
    532 1_ ‡a Described video in English.

Item has Described Video feature for visually impaired users, closed captions, and SDH.

    041 0_ ‡p eng ‡q eng
    341 0_ ‡a auditory ‡b captions ‡2 w3c
    341 0_ ‡a visual ‡d audioDescriptions ‡2 w3c
    532 1_ ‡a Closed captioning and described video in English.

Printed textual item includes Braille read-along tactile text.

    341 0_ ‡a textual ‡e braille ‡2 w3c
    532 1_ ‡a Read-along Braille.

344 - Sound characteristics

For the 344, enter information about the sound characteristics in a separate, repeated 344 field for each RDA vocabulary used. Rarer media format subfields do not appear in the list below. Please use LoC or OCLC resources for additional entries for cassettes, reel-to-reel tapes, phonographs, VHS, etc.

Recommended 344 subfields

Subfield	Vocabulary	Example
‡a	Type of recording	344 __ ‡a digital ‡2 rdatr
‡b	Recording medium	344 __ ‡b optical ‡2 rdarm
‡g	Configuration of playback channels	344 __ ‡g surround ‡2 rdacpc

347 - Digital encoding characteristics

For the 347, enter information about the digital encoding characteristics in a separate, repeated 347 field for each RDA vocabulary used. The 347 should not be used for traditional print or analog materials.

Due to the lack of a standard RDA vocabulary at this time for the subfield b, we have defined a local vocabulary that may be referenced here:
Guide to Material Type Icons.

Recommended 347 subfields

Subfield	Vocabulary	Example
‡a	File type	347 __ ‡a video file ‡2 rdaft
‡b	Encoding format	347 __ ‡b 4K UHD Blu-ray
‡e	Regional encoding	347 __ ‡e Region A ‡2 rdare

490/8XX series statements

As a consortium, we have made a commitment to include series information in our records whenever possible. This helps patrons and circulation staff locate the 'next book' or 'first book' of a series.

In the interest of better serving patrons, Evergreen catalogers may add series information to bibliographic records even if the series is not established in the LOC authority file.

Although series statements often appear on the title page, they are not part of the title. Series information belongs in a 490 field, not the 245.

Series name in the 490 field

Transcribe the name of the series in the 490 field exactly as it appears on the item in hand. You can take the series name from anywhere on the resource – title page, dust jacket, disc surface, container, etc. This field has no ending punctuation. Sentence case is optional, but preferred regardless of the series case on the item in hand.

If the series in question is one patrons may wish to follow, you will want to trace it by adding an 8XX field (see below). If the series is not one that would be of particular interest to patrons ("Penguin Classics" or "Thorndike Large Print", for instance), you may not want to take the time to trace it.

490 field, 1st indicator:

> 1 = series is traced   0 = series is not traced

If no series statement can be found on the item, but it is part of a recognized, traceable series, enter the series name as it appears in the 8XX entry in the 490 in brackets.

Example:

490 1_ ‡a [Alex Cross series] ; ‡v [Book 1]
800 1_ ‡a Patterson, James, ‡d 1947- ‡t Alex Cross series ; ‡v 01.

Tracing a series (8XX field)

The objective of tracing a series is to have a common series name in all the records for that series. The series name as it appears in your item may not be the same as the name used previously by the publisher. Tracing a series may make it easier for staff and patrons to locate the book or media.

Always use the authorized series name within the Evergreen Indiana authority file if available. If there is no authorized series entry in Evergreen Indiana, then check the Library of Congress for an authorized series entry. Do a title or name/title search on the Library of Congress Authorities website: http://authorities.loc.gov If not familiar with this website, utilize the 'help' features. Never assume that the series name used in the book is the authorized one in the Library of Congress.

If there is no authorized series name in the Evergreen Indiana authority file or Library of Congress authorities, Evergreen Indiana rules allow for the use of a locally established series name. First, look for other titles of the series in Evergreen and check the 8XX fields for an existing locally established name. If none is found, use the following criteria to establish a series name:

1. Transcribe the series name as it appears on the item in hand.
2. If no series name can be found on the item, check the author's official website.
3. If no series name is found on the author's website, use a database such as FantasticFiction.com, NoveList (subscription required), or Goodreads.com.

Which field to use: the 800 or the 830?

Use an 800 field to trace a series if the same primary author writes all titles in the series. Use an 830 field if multiple primary authors write the series.

800 1_ ‡a (Author name as it appears in the 100 field). ‡t (Authorized or standard series name) ; ‡v (series number).

830 _0 ‡a (Name of series) ; ‡v (series number).

Tracing Manga Series

Many authorized headings for translated mangas are in their original language; therefore, the series titles are not as searchable for patrons using the series input option within the catalog. However, most manga series names are the books' titles so they appear in the 245 field with numerical values and part information when available.

Example:

    =100 1\‡a Toboso, Yana,‡d 1984-‡0(EG-IN)1398382
    =245 10‡a Black butler.‡n XV /‡c Yana Toboso ; [translation, Tomo Kimura ; lettering, Alexis Eckerman].

    =100 1\‡a Tabata, Yūki,‡0(DLC)no2016145424‡e author,‡e artist.
    =245 10‡a Black clover.‡n 4,‡p The crimson lion king /‡c story and art by Yuki Tabata ; translation, Taylor Engel, HC Language Solutions, Inc. .

Including a 490/8xx field is appropriate, but not required. Use the authorized heading if available.

Example:

    =100 1\‡a Toboso, Yana,‡d 1984-‡0(EG-IN)1398382
    =245 10‡a Black butler.$nXXVI /‡cYana Toboso ; translation: Tomo Kimura ; lettering: Bianca Pistillo.
    =490 1\‡a Black butler ;‡v XXVI
    =800 1\‡a Toboso, Yana,‡d 1984-‡t Kuroshitsuji. ‡l English ;‡v26.

For easier searching, patrons and staff are recommended to search the manga title using a Keyword or Title search option in the catalog.

Series with Multiple Names and Multiple Authorized Headings

There are a number of instances when a series is known by multiple titles, and more than one heading is authorized. When this occurs, both authorized headings should be included in the bibliographic record. Use brackets in the 490 fields for information not found on the item in hand.

Example:

    =100 1\‡a Feehan, Christine,$0(DLC)no 00008349,‡e author.
    =245 1\‡a Dark legacy /‡c Christine Feehan.
    =490 1\‡a A Carpathian novel ;‡v [31]
    =490 1\‡a [Dark series] ;‡v[31]
    =500 \\‡a Series information (Dark series) from NoveList.
    =500 \\‡a [Dark series #30 when not including eBook only Dark Crimes]
    =800 1\‡a Feehan, Christine.‡t Carpathian novel ;‡v 31.‡0(EG-IN)1453835
    =800 1\‡a Feehan, Christine.‡t Dark series ;‡v 31.‡0(EG-IN)1453835

Series with Multiple Names but One Authorized Heading

Both series names may be entered in the record, but only the authorized name should be traced. Use a non-traced 490 for the unauthorized series name and a traced 490 for the authorized.

Example:
>=100 1\‡a Cussler, Clive.‡0(DLC)1199697
>=245 10‡a Nighthawk :‡ba novel from the NUMA files /‡cClive Cussler and Graham Brown.
>=490 1\‡a A Kurt Austin adventure ;‡v [book 14]
>=490 0\‡a A novel from the NUMA files ;‡v [book 14]
>=500 1\‡a Series numeration for NUMA files from Fantastic Fiction.
>=700 1\‡a Brown, Graham,‡d1969-‡e author.‡0(EG-IN)1408374
>=800 1\‡a Cussler, Clive.‡t Kurt Austin adventures ;‡v14.‡0(EG-IN)696857

Titles That Are Part of Multiple Series

Series crossovers will use a 490/8xx combination for both series titles. If the second series title is not authorized, follow the Tracing a series procedures. Use brackets for information not found on the item in hand.

Example:
>=100 1\‡aJance, Judith A.‡eauthor.‡0(DLC)797415
>=245 10‡aDance of the bones /‡cJ.A. Jance.
>=490 1\‡aJ.P. Beaumont ;‡v[book 22]
>=490 1\‡a[Walker family ;‡vbook 5]
>=500 \\‡a"A J.P. Beaumont and Brandon Walker novel"--cover.
>=500 \\‡aSeries numerations taken from author's website.
>=500 \\‡aWalker family series information taken from author's website.
>=800 1\‡aJance, Judith A.‡tJ. P. Beaumont mysteries ;$v22.‡0(EG-IN)1450658
>=800 1\‡aJance, Judith A.‡tWalker family ;‡v05.

Series numeration

Adding the series number to the 490/8XX fields is optional but encouraged. If you obtain the series number from a source other than the item in hand, put the number in brackets in the 490 field and add a 500 field identifying the source of the numeration. Do not put the number in brackets in the 8XX field.

Omit description such as "#", "bk.", or "volume" from the 8XX field but you can include them in the 490.

All numbers in the 8XX field should be 2-digit or more (03 instead of 3 or 003 if there are 100 or more works in the series). Series numbers in both fields go in a subfield v, which is always preceded by a semicolon.

Examples:

      490 1_ ‡a A Virgil Flowers mystery ; ‡v [bk. 5]
      500 __ ‡a Series numeration from goodreads.com.
      800 1_ ‡a Sandford, John, ‡d 1944 Feb 23- ‡t Virgil Flowers novel ; ‡v 05.

      490 1_ ‡a Hearts of Middlefield novel ; ‡v Book 3
      800 1_ ‡a Fuller, Kathleen. ‡t Hearts of Middlefield ; ‡v 03.

      490 0_ ‡a Pelican Books
      490 1_ ‡a Harlequin intrigue ; ‡v #1344
      830 _0 ‡a Harlequin intrigue ; ‡v 1344.

Novellas
Some authors write novellas as part of an established series. When adding series numeration to a novella record, transcribe the 490 field as it appears on hand. Add brackets around information that is taken from another source. Do not add a number to the 8xx field, but include a 500 note field with numeration information by the author or by the alternative source.

Examples:

      490 1_ ‡a A tales from Ivy Hill novella ; ‡v [book 3.5]
      500 __ ‡a Novella released after book 3 in series.
      500 __ ‡a This novella is #3.5 in the series.
      800 1_ ‡a Klassen, Julie, ‡d 1964- ‡t Tales from Ivy Hill.

      490 1_ ‡a [In death series ;‡v [book 7.5]
      500 __ ‡a Series numeration from Goodreads.
      500 __ ‡a This novella is #7.5 in the series.
      800 1_ ‡a Robb, J. D., ‡d 1950- ‡t In death novel.

Novellas are commonly published as a collection in a single volume with each title frequently authored by a different person. When the novellas are a part of a series, follow the instructions for [omnibus print resources](#) and use 490/8xx fields for each title. Include a 500 note for source information.

Example:

      490 1_ ‡3 Interlude in death :‡a[In death novel ;‡vbook 12.5]

490 1_ ‡3Kinsman :‡a[Kinsman series ;‡vbook 0.5]
490 1_ ‡3Immortality :‡a[The immortals series ;‡vbook 0.5]
490 0_ ‡3Magic like heat across my skin :‡a[Anita Blake, vampire hunter ;‡vbook 10 excerpt]
500 __ ‡a Series information taken from Goodreads and authors' websites.
500 __ ‡a Interlude in death is #12.5 in the In death series by J.D. Robb.
500 __ ‡a Kinsman is #0.5 in the Kinsman series by Susan Krinard.
500 __ ‡a Immortality is #0.5 in the Immortals series by Maggie Shayne.
500 __ ‡a Magic like heat across my skin is the first 6 chapters of Narcissus in chains by Laurell K. Hamilton.
800 1_ ‡3 Interlude in death :‡aRobb, J. D., ‡d1950- ‡tIn death novel.
800 1_ ‡3 Kinsman :‡a Krinard, Susan. ‡t Kinsman.
800 1_ ‡3Immortality :‡aShayne, Maggie. ‡t Immortals.

Older MARC records may contain series statements in a 440 field. This field is obsolete. Delete the field and replace with the correct 490/8XX fields.

Both the 490 and 8XX fields are repeatable if the item is a part of multiple series or part of a parallel titled series.

Some publishers have been known to change the name of the series even though there are no other changes for the book, including the ISBN, publishing information, and pagination. In those cases, please include both series in the 490 and 8XX fields. There should also be a 500 note in the record as well that states the book may be published under either series name. Here is the example:

490 1_ ‡a Hello reader
490 1_ ‡a Scholastic readers
500 __ ‡a Book may be published under either series name.
830 _0 ‡a Hello reader.
830 _0 ‡a Scholastic reader.

To source series numeration entries, catalogers are encouraged to work down this list of resources in order to assign the numeration:

- Series numeration as it appears on the item
- Author's/Publisher's website
- NoveList (currently in the Evergreen Indiana catalog)
- Fantastic Fiction
- Good Reads
- FictionDB
- FactFict

See also on how to handle items which contain multiple titles.

521 Audience field

Optional, but the cataloger is strongly encouraged to use this field in tandem with the required Audience (Audn) fixed field.

Whenever audience information such as suggested age level, reading level or ratings standards is included on the resource being cataloged, it should be recorded in bibliographic record in the 521 field.

The Audience (Audn) fixed field code should reflect the information in the 521 field. Refer to OCLC Bib Formats and Standards: Audn for help in coding the fixed field.

Examples:

On book:	Ages 3-5 years	521 1_ ‡a 3-5 years.	Audience code: a
On book:	Grades 6-9.	521 2_ ‡a 6-9.	Audience code: c

Videodisc records and the 521 field

When cataloging videodiscs or videocassettes, the 521 field is the place to record the MPA (formerly MPAA) rating or TV Parental Guidelines rating given the material being cataloged. MPA ratings include the following: G, PG, PG-13, R, Unrated and Not Rated. TV Parental Guidelines include the following: TV-Y, TV-Y7, TV-G, TV-PG, TV-14, and TV-MA. Include any explanation of the rating given on the packaging. Here are some examples:

521 8_ ‡a MPA rating: G.
521 8_ ‡a MPA rating: PG, for brief sensuality and language
521 8_ ‡a Canadian movie rating: G.
521 8_ ‡a MPA rating: R, for strong violence and gore.
521 8_ ‡a TV-14, for suggestive themes and crude humor.
521 8_ ‡a Unrated.
521 8_ ‡a Not rated.

Note that the Audience (Audn) fixed field for videorecordings is 'g' for all MPA/TV Parental Guidelines ratings except for R, TV-MA, and Unrated, which is coded 'e'. Videodiscs and videos that are not rated should be assigned an audience code based on information on packaging and reviews.

The cataloger is encouraged to enter the rating system from another country as well if that rating is on the videodisc packaging.

Videogame records and the 521 field

When cataloging videogames, the 521 field is the place to record the ESRB rating given the material being cataloged. These ratings include the following: E for Everyone, E 10+ for Everyone ages 10 and up, T for Teen, M for Mature ages 17+, and A for Adults only. Include any explanation of the rating given on the packaging. Here are some examples:

> 521 8_ ‡a ESRB rating: E for Everyone.
> 521 8_ ‡a ESRB rating: E 10+, for fantasy violence and mild blood.
> 521 8_ ‡a ESRB rating: M, for sexual themes, strong language, intense violence, and partial nudity.

Lexile measures

Lexile measures provide information about the difficulty of a text. A Lexile text measure is permanently assigned to a title and its associated ISBN. These measures may be added to MARC records in Evergreen, in the 521 Audience field.

The Lexile measurements for a title and specific ISBN may be found on the MetaMetrics, Inc. website. The Lexile Find-A-Book site may be used in order to find the Lexile measurements for specific titles and their associated ISBNs.

Examples:
> 521 8_ ‡a 890 ‡b Lexile.
> 521 8_ ‡a 690 ‡b Lexile.
> 521 8_ ‡a AD440L ‡b Lexile
> 521 8_ ‡a BR ‡b Lexile.

Caution: Different editions or versions of a book may have different Lexile measures.

Adding Lexile information to bibliographic records is optional. It may be added to records if your staff or patrons find it useful. If Lexile information has already been added to a record by another cataloger, do not remove it from the record.

If desired, a note may be added to the record to indicate that Lexile information was unavailable at the time of cataloging. Please indicate the date the information was added in the note as seen below.

Example:
> 500 __ ‡a No Lexile value assigned as of 6/3/2018

Note: Adding these notes is not required. Please only enter this note if you have checked for Lexile information and need to know later that the Lexile value was unavailable.

See also Omnibus print resources on how to handle items which contain multiple titles with multiple Lexile measures.

526 Reading program information

Nationally standardized reading program information from multiple programs may be included in the bibliographic record. Locally defined Reading Counts and Accelerated Reader program entries are not valid and should be removed if observed in a record.

See also Omnibus print resources on how to handle items which contain multiple titles.

Renaissance Accelerated Reader Program

The Renaissance Accelerated Reader program is an accepted, nationally standardized program that may be included in Evergreen Indiana bibliographic records. To locate an item in the Renaissance database, please visit:

http://www.arbookfinder.com/default.aspx

Once your item has been located, use the following template to fill out the entries in the bibliographic record:

> 526 0_ ‡a Accelerated Reader AR ‡b [Interest Level] ‡c [ATOS Book Level]
> ‡d [Point Level] ‡z [Test Number].

Please note that different editions or versions of the book may have different entries in the Renaissance system. Use the ISBN to ensure that the entry is correct for the edition in hand.

Examples include:

> 020 __ ‡a 9781338099133
> 245 10 ‡a Harry Potter and the cursed child / ‡c J.K. Rowling.
> 526 0_ ‡a Accelerated Reader AR ‡b MG+ ‡c 3.9 ‡d 6.0 ‡z 183840.
>
> 020 __ ‡a 9780061146190
> 245 10 ‡a The littlest evergreen / ‡c Henry Cole.
> 526 0_ ‡a Accelerated Reader AR ‡b LG ‡c 3.7 ‡d 0.5 ‡z 147902.

Adding Renaissance AR information to bibliographic records is optional, but the content may be useful for your staff and patrons. If Renaissance AR information has already been added to the record by another cataloger, do not remove it from the record.

Reading Counts! Program

The Reading Counts! program, hosted by Houghton Mifflin Harcourt and formerly Scholastic Reading Counts, is an accepted, nationally standardized program that may be included in Evergreen Indiana bibliographic records. To locate an item in the RC database, please go to: https://readingcountsbookexpert.tgds.hmhco.com/

Once your item has been located, use the following template to fill out the entries in the bibliographic record:

> 526 0_ ‡a Reading Counts! ‡b [Interest Level] ‡c [Reading Level] ‡d [Point Level]
> ‡x EG-IN.

Please note and pay special attention to including the ‡x EG-IN nonpublic note in these records to show that you've verified the entry with the national Reading Counts! database.

Examples include:

> 245 10 ‡a Harry Potter and the cursed child / ‡c J.K. Rowling.
> 526 0_ ‡a Reading Counts! ‡b 6-8 ‡c 5.1 ‡d 10 ‡x EG-IN.
>
> 245 10 ‡a Let's visit the evergreen forest / ‡c Buffy Silverman.
> 526 0_ ‡a Reading Counts! ‡b K-2 ‡c 3.3 ‡d 1 ‡x EG-IN.

Adding Reading Counts! information to bibliographic records is optional, but the content may be useful for your staff and patrons. If Reading Counts! information has already been verified and added to the record by another cataloger, do not remove it from the record.

See Omnibus

586 Awards note

The 586 field is used to record awards associated with the item being cataloged. Adding this information is encouraged.

Follow the pattern established in the examples below:

> 586 _ _ ‡a Academy Award, 1987: Best Picture
> 586 _ _ ‡a Academy Award, 1987: Best Actor, Michael Caine
> 586 _ _ ‡a Emmy Award, 1980/81: Best Classical Program in the Performing Arts
> 586 _ _ ‡a Caldecott Medal, 1979
> 586 _ _ ‡a National Book Award, 1981
> 586 _ _ ‡a Pulitzer Prize for Nonfiction, 1981

Indiana book awards

For nominees and award winners of Indiana book award programs, the following pattern is recommended for use:

> 586 _ _ ‡a Nominee: Young Hoosier Book Award, 1997-1998:
>   Intermediate Grades (4-6)
> 586 _ _ ‡a Nominee: Eliot Rosewater Indiana High School Award,
>   2015-2016
> 586 _ _ ‡a Nominee: Indiana Early Literacy Firefly Award, 2019
>
> 586 _ _ ‡a Young Hoosier Book Award, 1997-1998: Intermediate Grades (4-6)
> 586 _ _ ‡a Eliot Rosewater Indiana High School Award, 2015-2016
> 586 _ _ ‡a Indiana Early Literacy Firefly Award, 2019

Be sure to transfer award information when merging bibliographic records!

Note: Nomination entries should be removed from the winning entry and replaced with the award notice once the final selection is made. Nomination entries may be retained for non-winning titles.

588 Source of description

A note stating where the title proper was taken should be included in a 588 field when it is not taken from one of these sources (RDA 2.17.2.3):

- "The title page, title sheet…of a manifestation consisting of multiple pages…"
- "The title frame or title screen of a manifestation consisting of moving images"

Use a 1st indicator of 0 for source of description. The 2nd indicator is undefined.

For audiovisual material:

> 588 0 _ ‡a Title from disc label.
> or
> 588 0 _ ‡a Title from container.
> or
> 588 0 _ ‡a Title from title screen.
>   *Resource described is a computer disc*
> or
> 588 0 _ ‡a Title from cartridge.

Resource described is a game cartridge (Nintendo Switch game, e.g.)

Add a terminal period at the end of the field unless the last subfield ends with an ellipsis or period (following an abbreviation or initial).

6XX subject heading fields

The Evergreen Indiana Cataloging Policy requires that every bibliographic record contain at least one Library of Congress Subject Heading (LCSH).

Catalogers are encouraged to add additional subject headings. Search for established subject headings on the Library of Congress Authorities website: http://authorities.loc.gov.

Use the Help pages on that site if you are unsure how to use this resource.

If cataloging an audiobook, large print, or mass market paperback edition of a title and your record has no subject headings, check the hardcover edition in Evergreen and copy subject headings from that record.

If you find subject headings from established thesauri other than Library of Congress on a record, do not delete them as they may be valuable to other libraries and enrich the database for keyword searching. These include Sears, Children's Annotated, BISAC, OCLC FAST, and Blindex.

Local subject headings and other local practices

Because bibliographic records are shared by all members of the consortium, information of a strictly local nature should never be included in an Evergreen record. This includes donor and memorial information, prices, book condition, purchase dates, local subject headings, and autographed copy information.

An alternative to adding local information to a bib record is to attach it to your library's holding in the form of an item note and/or item tag. Check your EI Cataloging Manual for information on how to add an item note or item tag.

If you find a local note or subject heading on an Evergreen record (often found in a 590 or 690 field), please delete it. If you can determine which library entered the local info, send a courtesy email advising what information was removed from the record in case the library wishes to add the information to their holding in an item note or item tag.

Local authors, artists, musicians, actors

Special subject headings for Indiana authors, Indiana actors, Indiana musicians, etc. are permitted in Evergreen.   Below are some examples:

650 ‡a Authors ‡z Indiana.
650 ‡a Musicians ‡z Indiana.
650 ‡a Actors ‡z Indiana ‡z Ripley County.
650 ‡a Artist ‡z Indiana ‡z Waveland.

FAST Subject headings

FAST (Faceted Application of Subject Terminology) subject headings are the result of a collaboration between the Library of Congress and OCLC. Because they are based on vocabularies used by the Library of Congress and therefore seem repetitive, they are suppressed from public display in the Evergreen catalog. However, these are legitimate subject headings and should be retained in the record if present.

655 genre/form headings

Adding Genre/Form Headings are optional, but strongly encouraged.
- A useful list of genre headings:
  http://www.hahnlibrary.net/libraries/formgenre.html
- GSAFD Genre headings:
  http://experimental.worldcat.org/gsafd/browseGSAFD.html
- Library of Congress genre/form terms for library and archival materials (LCGFT):
  https://www.loc.gov/aba/publications/FreeLCGFT/freelcgft.html
- OCLC MARC 21 standards for using Genre headings:
  http://www.oclc.org/bibformats/en/6xx/655.shtm

7XX added entry headings

Please use authorized forms if they can be found either in the Evergreen Indiana authorities or the LoC authorities. The LC name authorities are available through the Library of Congress website and through the OCLC authority records.

http://authorities.loc.gov

A general rule of thumb is that every corporate or personal name found in the Statement of Responsibility (245 ‡c) should appear in a 7XX field unless the name appears in a 1XX. A 7XX field is optional but encouraged for names found elsewhere in the bibliographic record.

Most contributors are not considered core requirements in RDA. The first listed illustrator for children's works is required, and catalogers are encouraged to add 7XX fields for as many contributors as are deemed helpful for access.

753 System Details for software and videogames

In Evergreen Indiana, we use the 753 to create the access points for specific videogaming platforms and software. The entries are controlled by the Game Metadata and Citation Project Controlled Vocabularies (gcipplatform).

Examples:
   753 __ ‡a Microsoft Xbox One ‡0 (uri)http://gamemetadata.org/platform/1017
       ‡2 gcipplatform

   753 __ ‡a Sony Playstation 4 ‡0 (uri)http://gamemetadata.org/platform/1071
       ‡2 gcipplatform

For a complete list of selected entries supported by the Evergreen Indiana catalog, please use the Guide to Material Type Icons.

776 Additional Physical Form Entry

The 776 field in MARC records is used to describe information about other available physical forms of the target item. In Evergreen Indiana, it is not required to include 776 fields in the MARC records, but they should not be deleted if already present in the record.

8XX series added entries

See 490/8XX series statements.

856 Electronic Location and Access

Catalogers are encouraged to add electronic links to materials such as publisher's descriptions, book trailers, author biographies, and sample text. These links enhance a record and can be useful to patrons. Be sure to add a brief description of the resource in subfield 3.

The second indicator of the 856 determines whether or not the link is displayed in the OPAC. If coded a 0, 1, or 2, the link will display. The electronic resource will not display if the second indicator is coded as 8 or not coded.

The actual link must appear in the subfield u. Subfield y will be presented as the text of the link in the catalog; subfield z will be presented as note text following the link.

These links display in the OPAC under the heading "Electronic Resources".

Check the links in the 856 fields to make sure they work.

Example:

856 42 ‡3 Book trailer ‡u http://www.youtube.com/watch?v=BIQ4NunVFnc
‡y Book trailer

See OCLC Bib Formats and Standards for more specific instructions on the 856 field:
http://www.oclc.org/bibformats/en/8xx/856.html

Another source of information is the Library of Congress site:
http://www.loc.gov/marc/bibliographic/bd856.html

Variable Fields to be deleted in Evergreen Indiana

Use this list to determine which fields should be deleted from MARC records in Evergreen Indiana:

- ✓ 011 Linking Library of Congress control number [obsolete]
- ✓ 012 Terminal Display
- ✓ 016 National Bibliographic Agency Control Number
- ✓ 029 Other System Control Number
- ✓ 061 NLM Copy Statement
- ✓ 069 Other System Control Number [obsolete OCLC-defined field]
- ✓ 071 NAL Copy Statement
- ✓ 096 Locally Assigned NLM-type Call Number
- ✓ 098 Other Classification Schemes
- ✓ 211 Acronym or shortened title [obsolete]
- ✓ 212 Variant access title [obsolete]
- ✓ 214 Augmented title [obsolete]
- ✓ 241 Romanized title [obsolete]
- ✓ 263 Projected Publication Date (This field should be stripped when upgrading a record from prepublication-level to full-level cataloging.)
- ✓ 350 Price [obsolete]
- ✓ 359 Rental Price [obsolete]
- ✓ 440 Series entry [obsolete]
- ✓ 510 Citation (This field should be stripped if it refers to reviews of popular materials; it may be left in the record if it contains scholarly citations.)
- ✓ 590 Local notes specific to only one item in one library (See section 6.2.10.1)
- ✓ 596 Local holdings codes
- ✓ 652 Subject added entry—Reversed geographic [obsolete]
- ✓ 653 Index Term - Uncontrolled
- ✓ 654 Subject Added Entry - Faceted Topical Term
- ✓ 656 Index Term - Occupation

- ✓ 657 Index Term - Function
- ✓ 658 Index Term - Curriculum Objective
- ✓ 690 Local subject headings
- ✓ 699 Added Classification Number
- ✓ 755 Added Entry—Physical characteristics [obsolete]
- ✓ 850 Holding Institution
- ✓ 852 Location/Call Number (defined as part of the MARC Format for Holdings so inappropriate in bibliographic records)
- ✓ 87X Variant Forms of Entry [obsolete]
- ✓ 890 Local Library of Congress Holdings
- ✓ 9XX These fields can be deleted except for 901, 994 and those 949 fields used for adding government documents from the Government Printing Office through the use of MARCIVE. The 949 fields in MARC records for these government documents will appear in the following manner:
  - ○ 949 __ $h SUDOC   (for government documents in print)
  - ○ 949 __ $h SUDOCC   (for government documents on CD-ROM)
  - ○ 949 __ $h SUDOCF   (for government documents on microfiche)
  - ○ 949 __ $h ONLINE   (for government documents in an online environment)

Record Notes

A record note may be used to indicate when a MARC record is under active review or when an issue in the record has been reviewed with a final verdict by the community. Record notes may be created by catalogers with Cat1 or Cat2 permissions.

Examples:

> In this example, a cataloger has claimed a record for updating. Other catalogers should not edit the listed points of review unless the review has been open for more than 7 days.

> > Enter into the note field: Special features and running time under active review. / cnsrt-jdoe

> In this example, the review has been completed. The responsible cataloger has closed out the review and noted the outcome. Do not modify a record to remove or change confirmed entries on the bibliographic record.

> > Enter into the note field: Presence of map and 6 color plates confirmed on listserv 2020-03-05. / cnsrt-jdoe

In the event that a record review results in a new record being brought in to resolve a variance in the material, move the note or add an additional note to the appropriate record(s) as needed.

When merging records, record notes will only be preserved if that record is selected as the lead. Any other record notes should be recreated on the resulting record if appropriate.

For instructions on how to use the Record Notes feature, see the [Cataloging Training Manual](#).

Authority Control in Evergreen Indiana

Evergreen Indiana outsources authority control functions to a commercial vendor, MARCive, Inc. Each month, updated authority records are received from MARCive and loaded into the Evergreen Indiana authority database by the Indiana State Library. Newly added bibliographic records and unmatched records from migrations are sent to MARCive on approximately a quarterly basis. Records that have been sent to MARCive will have a ‡d MvI added to the 040 field. It is OK to overlay or edit records that have been sent to MARCive.

Within Evergreen, a bib linker runs continuously and automatically validates all headings that can be validated against the current authority file. Generally this process will be complete within 24 hours. It is not necessary for catalogers to validate headings and the "Validate" button in the MARC Edit view should not be relied upon.   Subject headings that have been validated by the bib linker will be appended with a $0 containing the record id number for the corresponding authority file:

> 650 _ 0 ‡aTotalitarianism ‡v Fiction. ‡0 (EG-IN)1058923

Many valid subject headings will not be validated by Evergreen's bib linker. This is because Evergreen validates against the entire subject heading string, not just part of it. If a subject heading does not validate in Evergreen, it is likely that the Library of Congress has not created an authority file for that particular subject heading string.

Cataloging Procedures for new controlled entries

1. Verify subject headings against [Library of Congress Authorities](#).
2. If heading isn't in the LoC authority database, check the Evergreen Indiana catalog to see if another cataloger has already established a local heading. If you find a match, be sure to enter the heading in your record exactly as it appears in the catalog.

3. If no heading exists, establish one in your MARC record based on cataloging guidelines (see the end of this section for a list of resources).

Libraries frequently need to establish headings for local entities for which there are no official Library of Congress authority records. If you need to establish a new heading you will qualify the heading with the name of the geographic place in which it is located:

Cemeteries:	610 _0 ‡a Black Creek Friends Cemetery (Grant County, Ind.)
Churches:	610 __ ‡a First Presbyterian Church (Warsaw, Ind.)
High Schools:	610 __ ‡a Columbia City High School (Columbia City, Ind.)
Townships:	651 __ ‡a Clear Lake (Steuben County, Ind. : Township)
Businesses:	610 __ ‡a Mills Memorial Water Works (Thorntown, Ind.)

VIAF Headings

The Virtual Internet Authority File [VIAF] is a dataset which combines multiple authority files into a single authority source. It is implemented and hosted by OCLC and may be found in records brought into the Evergreen Indiana catalog. These will appear either as a ‡0 or ‡1 followed by a URI to viaf.org which is appended to the end of a heading.

Some examples of headings with a VIAF URI:
    100 1_ ‡a Obama, Michelle, ‡d 1964- ‡e author ‡1 http://viaf.org/viaf/81404344
    600 00 ‡a Zeus ‡c (Greek deity) ‡0 http://viaf.org/viaf/308237987
    651 00 ‡a Greenwich Village (New York, N.Y.) ‡0 http://viaf.org/viaf/128013029

VIAF references should not be removed from the record. They do not display in the OPAC view.

Resources for authority work

LC-PCC PS Library of Congress-Program for Cooperative Cataloging Policy Statements
    Availability: free through RDA Toolkit
- Chapter 9 – Identifying Persons
- Chapter 10 – Identifying Families
- Chapter 11 – Identifying Corporate Bodies
- Chapter 16 – Identifying Places

NACO Participant's Manual – 4th edition.
    Availability: https://www.loc.gov/aba/pcc/naco/documents/NACOParticipantsManual.pdf

RDA Toolkit
    Availability: with subscription only
- Chapter 8 – General Guidelines on Recording Attributes of Agents.

- Chapter 9 – Identifying Persons
- Chapter 10 – Identifying Families
- Chapter 11 – Identifying Corporate Bodies
- Chapter 16 – Identifying Places