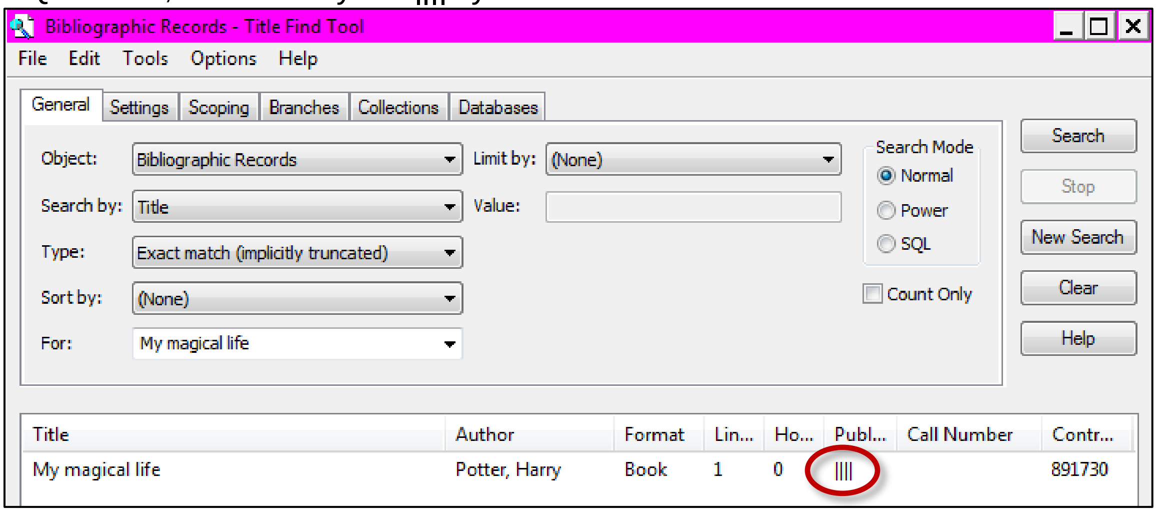
Item Maintenance

Cataloging Best Practices

Attaching Your Item Record to a Pre-Existing Quick Bib

After receiving a new book, check Polaris to see if a Bib record already exists. Go to **Cataloging ➔ Bibliographic Records** or **F12** to bring up the Find Tool. Search by Title. The record displayed is obviously a Quick Bib, identified by the |||| symbol in the Publication date column.

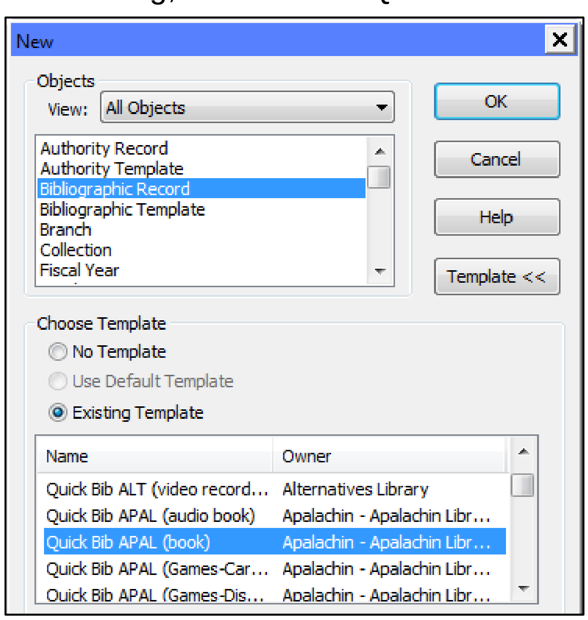


If a Quick Bib already exists you should attach your item record to it, as long as the 020 or 024 matches. Under publication date, |||| will be present. This indicates that this is a Quick Bib another library has created. Double click on the line item to bring up the bibliographic record. You may add an item record to the Quick Bib (or permanent Bibliographic Record) by following steps 12-16 below.

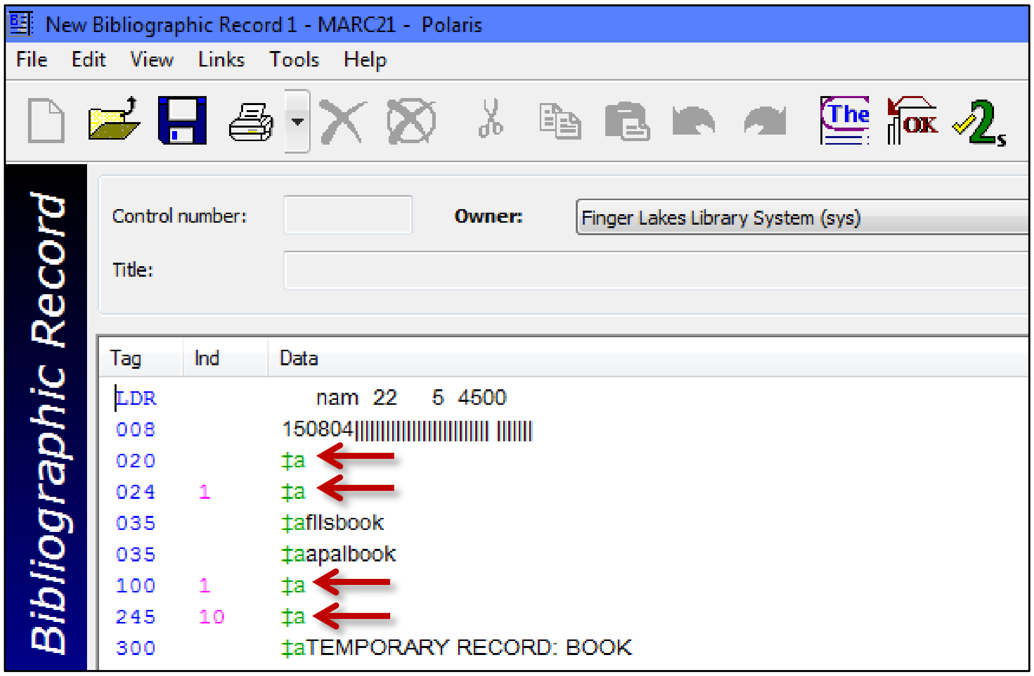
Creating a Quick Bib

This is assuming you have completed a search for the correct bib record and were unable to find one.

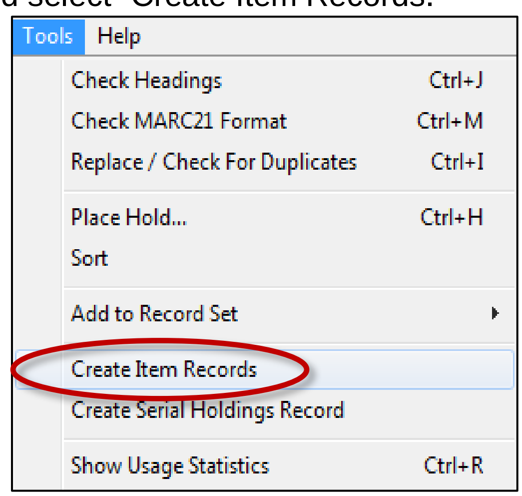
1. Go to **File ➔ New** or click on the New button.
2. Select "Bibliographic Record."
3. Select "Existing Template" and select your library Quick Bib template depending on the format: Book, audio book, sound recording, or video. Ex. *Quick Bib CAN (book)*. Then, click **OK.**



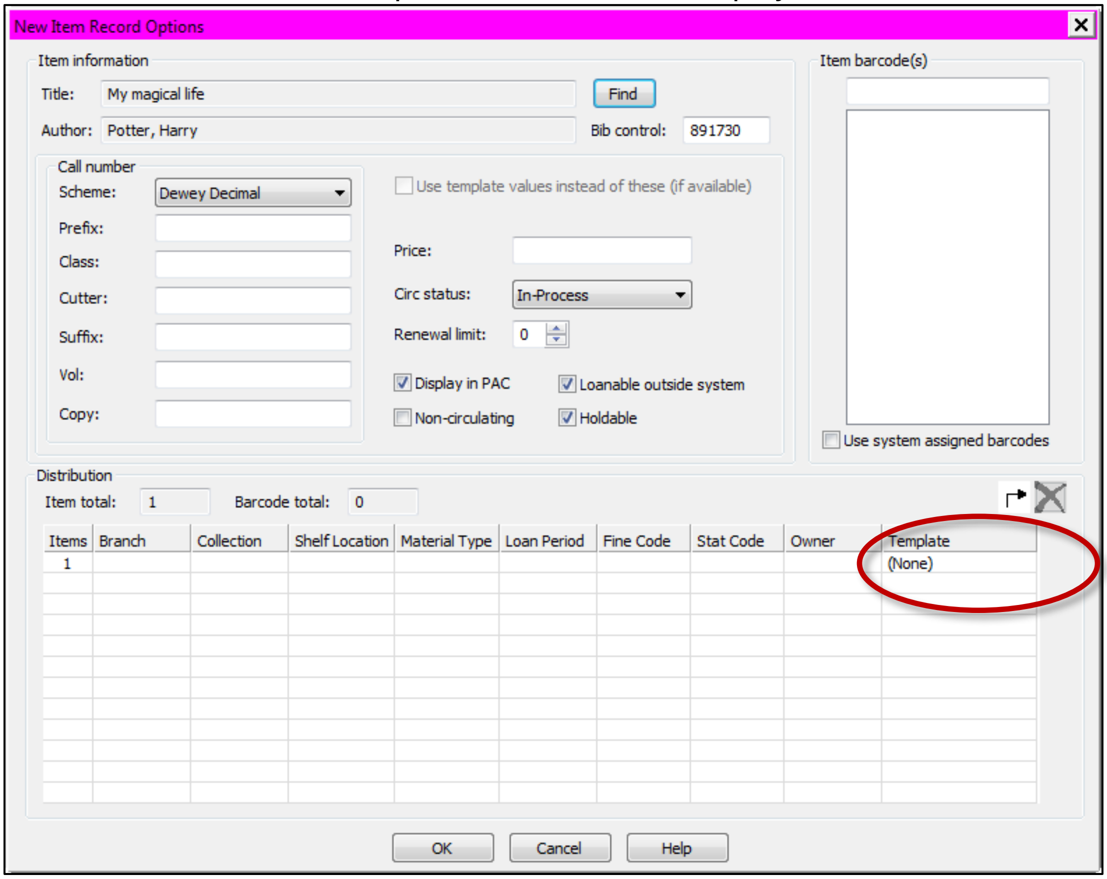
4. When the Quick Bib window displays, fill in the 020 field with the ISBN number. If no ISBN number is listed, type “none” in the field. **DON’T** scan in the item barcode here. It is **NOT** searchable in OCLC and should **NOT** be listed anywhere in the Bib record.
5. Fill in the 024 field with the UPC code, this field is required if no 020 is found. If no UPC code is listed, type “none” in the field. Do **NOT** create a Quick Bib with “none” in both the 020 and 024 field, see DO’s & DON’T’s on page 4.
6. It is **preferable** to include **BOTH** the ISBN and the UPC code in the bib record. See page 4-7 for Quick Bib Dos and DON’Ts.
7. Fill in the 100 field with the Author’s Name: Last Name, First Name.
8. Fill in the 245 field with the Title information. Do NOT include any initial articles that may be in the title, such as A, An, or The.



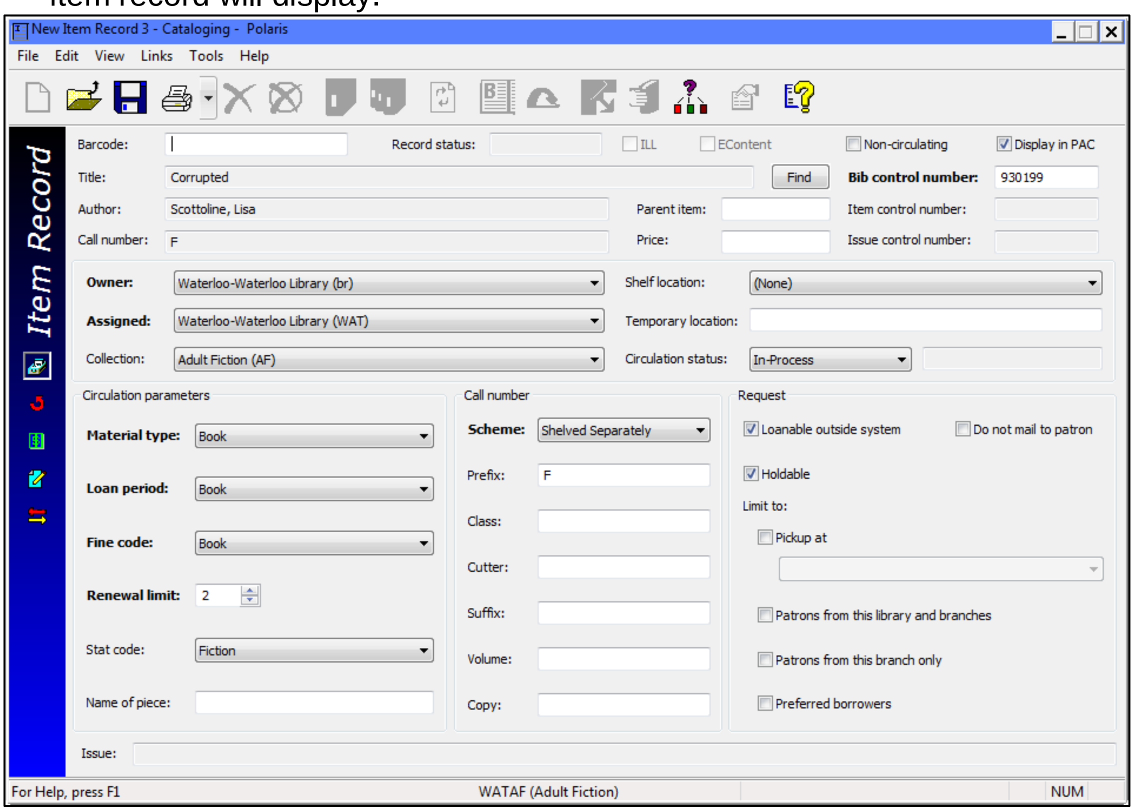
9. Do NOT delete the indicators in any field.
10. Click on the Save button or go to **File ➔ Save**.
11. The **Check Headings Assistant** will alert you to BIB headings with no exact authority matches. Click on **Continue Saving.**
12. Open the **Tools** menu and select “Create Item Records.”



13. The New Item Record Options work form will display.



14. Select the correct template by clicking on **(None)** and choosing from the drop down list. The item record will display.



15. The Prefix will already be filled in. Be sure to scan in the item barcode and then enter the Price, Class, Cutter, and Stat Code. Decide whether this item will be for Preferred Borrowers or not. Include donor information on the **Source and Acquisition** page. Include notes and blocks (ex. "Please check for 9 disks" for an audiobook) on the **Notes and Notices** page. If you are feeling unsure, pick a similar item from the shelf and view its item record.
16. Go to **File ➔ Save** or click on the Save icon.

Quick Bib DOs & DON'Ts

- A Quick Bib requires an ISBN (MARC tag 020) and/or a UPC/EAN code (MARC tag 024). If no ISBN AND no UPC/EAN code available on the item, **DON'T CREATE** a Quick bib. If by chance, only an ISBN or a UPC/EAN code is available, please enter "none" in one or the other remaining tag. For example:
    - 020 (ISBN) 1400060079
    - 024 (UPC/EAN) 781400060078

    - 020 (ISBN) none
    - 024 (UPC/EAN) 781400060078

    - 020 (ISBN) 1400060079
    - 024 (UPC/EAN) none

- **DON'T CREATE A QUICK BIB WITH:**
    - 020 (ISBN) none
    - 024 (UPC/EAN) none

- **DON'T** use the Quick bib unless you have the ISBN and/or the UPC code available to put into the record. If these two numbers are not available, send in the card, form, or photocopy for FLLS to create a Polaris item record – when the card, form, or photocopy is returned to you, update the item record.

- The ISBN can be either 10 or 13 digits in length. The 13 digit IBSNs begin with 978 or 979 (for example, 9780553803426) – NEVER enter the segmented numbers with hyphens. For example:
    - YES: 020 (ISBN) 1400060079
    - NO: 020 (ISBN) 1-4000-6007-9

- The UPC/EAN code may vary in length, usually 11-13 digits – **DON'T** enter spaces or hyphens. For example:
    - YES: 024 (UPC/EAN) 781400060078
    - NO: 024 (UPC/EAN) 7 8140006007 8

- When entering the UPC/EAN code, be sure to include ALL the numbers in the string. For example:
  - YES: 024 (UPC/EAN) 781400060078
  - NO: 024 (UPC/EAN) 8140006007(missing the leading and trailing numbers)

- Be very careful transcribing the ISBN and/or UPC code. If there is an error, it makes it very difficult for FLLS catalogers to replace the Quick bib with a permanent bib record. Scanning the ISBNUPC eliminates errors. If your scanner doesn't scan ISBN's/UPC's, contact Rex and he will help configure your scanner.

- Paw Prints bindings and Turtleback Books bindings have their own ISBNs merely because of the binding. When creating QuickBibs, add both the special binding ISBN (located on the back cover) as well as the ISBN found within the book (located on the verso).

- **DON'T** scan the Item barcode into the ISBN tag of the Quick Bib. Barcodes are not searchable in OCLC and therefore are irrelevant in a Quick Bib.

- If there is another number other than an ISBN and/or a UPC/EAN code, **DON'T** enter the number. For example:
  - 020 (ISBN) 1400060079
  - 024 (UPC/EAN) 781400060078
  - Extra number 52500 (NO!)

- Never enter the initial articles a, an, or the into the Quick bib title – this causes the title to be displayed in a browse search under the initial article instead of the first significant word.

- **DO** enter the author last name first. Enter in only one author name. If there is only an editor, enter the name. If there is no author or editor, enter "none". Video recordings do not require an author to be entered.

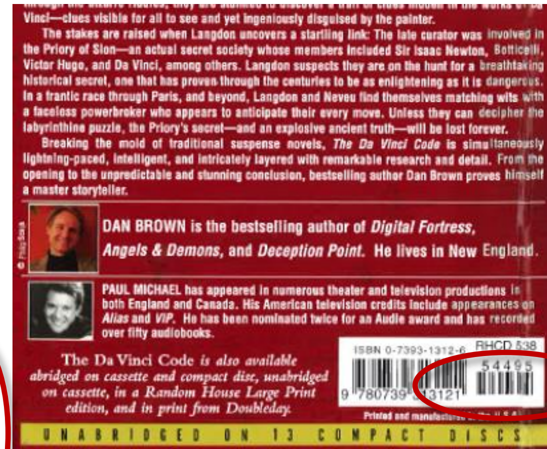
- Use only the Quick bib template that matches the format (book, audio book, music, or video) of the item you want to add. There are no Quick bib templates available for multimedia and electronic resources – if there is a demand for them, they will be created.

- Two new quick bib templates were recently created for games, one for game on a cartridge and the other for a game on a disc.

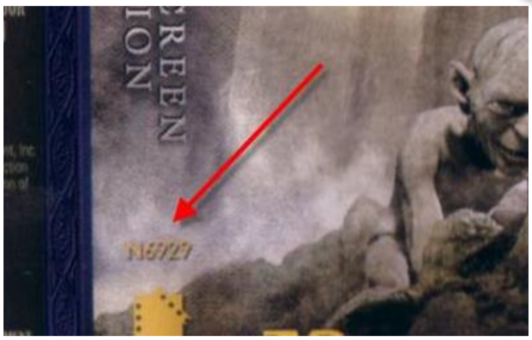
- Be sure to use the correct format. For example, do not use the AUDIO BOOK format for music – use MUSIC RECORDING.

- Filling out the 028 field (publisher number) is required for Music CDs, Audiobook CDs, and DVDs. For audiobook CDs, the publisher number is often found near the ISBN and/or UPC code and occasionally on the disc surface. Transcribe the number exactly as seen on the item, including letters, numbers, spaces and hyphens. An example is "RHCD 538" for a Random House audiobook. For music CDs, the publisher number is often found on the spine of the case and on the disc surface as well. An example is "UAE 34732" for a music CD published by United Audio Entertainment. Again, if a publisher number cannot be found, please add "none" to the field. An example for the DVD would be the "N6929" on the spine of the case and on the actual disc.

Music CD



Audiobook CD



DVD

- The Quick bib is not an integrated function of Polaris. The Quick bib was developed by using a variety of another Polaris system functions (e.g., creating templates and editing bib records) to produce a temporary bib record to allow you to circulate items that are not currently in the database. The Quick Bib has been tested, but there may be some hidden problems. **DO** notify FLLS of any issues you come across.

- If you get lost or don't know what's going on when creating a Quick bib, simply close out the function and respond to the prompt "You have made changes to this record. Do you want to save the changes?" by clicking on the **No** button.

- **DON'T** try to enter other bibliographic information into the Quick bib. We cannot keep you from doing so, but be warned that if you really don't know what you're doing, you will most likely run into trouble forcing you to quit.

- **DO** add your item to a Quick bib created by another library – just make sure the ISBN and UPC numbers in the bib match your item in hand. You cannot edit another library's Quick bib, but you can add your item record to it.

- Libraries that add item records to an existing Quick bib no longer have to send in a card, form, or photocopy – just make sure that the title, ISBN, and/or UPC of the item you add matches the Quick bib.

- As you file your Quick bib you will be prompted to accept the author entered – just click on **Continue Saving**. You should not see any more prompts to continue, and you will see the “Record status” of “Final”. If you do receive another prompt after the initial one, please exit from the record you are creating, and start over. If you continue to have a problem, call Jenny or Deb. Note that for videos, no author is required – only the title, ISBN and/or UPC code.

- **DON’T** let any staff create Quick bibs unless they are both permissioned on Polaris and have received training from you.

- If any changes have to be made to the Quick bib procedure as a result of feedback, FLLS will notify you via the FALCONS list. Please make a point of reading your email, and just as important, let your staff know about any changes.

- *A request from our catalogers for the actual material does NOT indicate you are doing something wrong. It simply means that the information provided in the Quick Bib is not sufficient to make an accurate match in OCLC. Having the material in hand gives the catalogers more places to look for the necessary information to search on OCLC for an exact match.*

Item Records

- Please use the item templates when adding item records to Quick bibs.

- You can create new item templates as needed. **Polaris Toolbar ➔ File ➔ New ➔ Item Template ➔ set your desired parameters ➔ Save.**

- Remember to include a Stat Code.

- All **bold** fields of the item record are required and you cannot save without making a selection, but double check to make sure that you covered all the appropriate fields!

- New items do not automatically change after a certain period of time, you must bulk change the following parameters after your items are no longer considered “New”: **Collection Code**, **Material type**, **Loan period**, **Fine code**, **Renewals**, and **Preferred borrowers**. So, it is a good idea to enter all new items into a record set each month.

- Follow established county guidelines and agreements when determining loan periods and request parameters.

- *A note about restrictions:* The Preferred borrowers hold restriction allows items to be placed on Hold and move between the libraries within that Preferred Borrowers Group. The following 2 restrictions “Patrons from this library and branch only” & “Patrons from this branch only” allow you to restrict that item so only patrons registered at your library can place a hold on that item. They can however request to pick it up at one of the other libraries in the system.

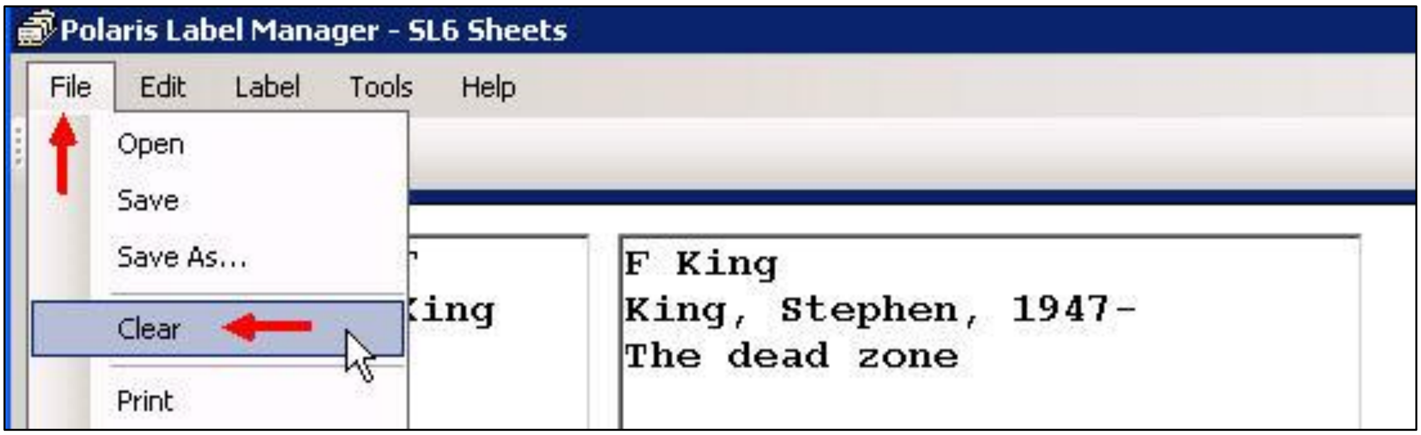
Processing Best Practices

The physical processing of the items in your library is also very important. Below are some best practices to remember when processing new items added to your collection.

- It is recommended that barcodes are placed on the front cover of your items. This will help facilitate self-checkout – which might not be a concern now but could be in the future.
- Not sure on where to place barcodes or place special library markings? Imitate what you find on books already in your collection.
- Many vendors will process your items for you. This includes covers and labels. Pockets are unnecessary.

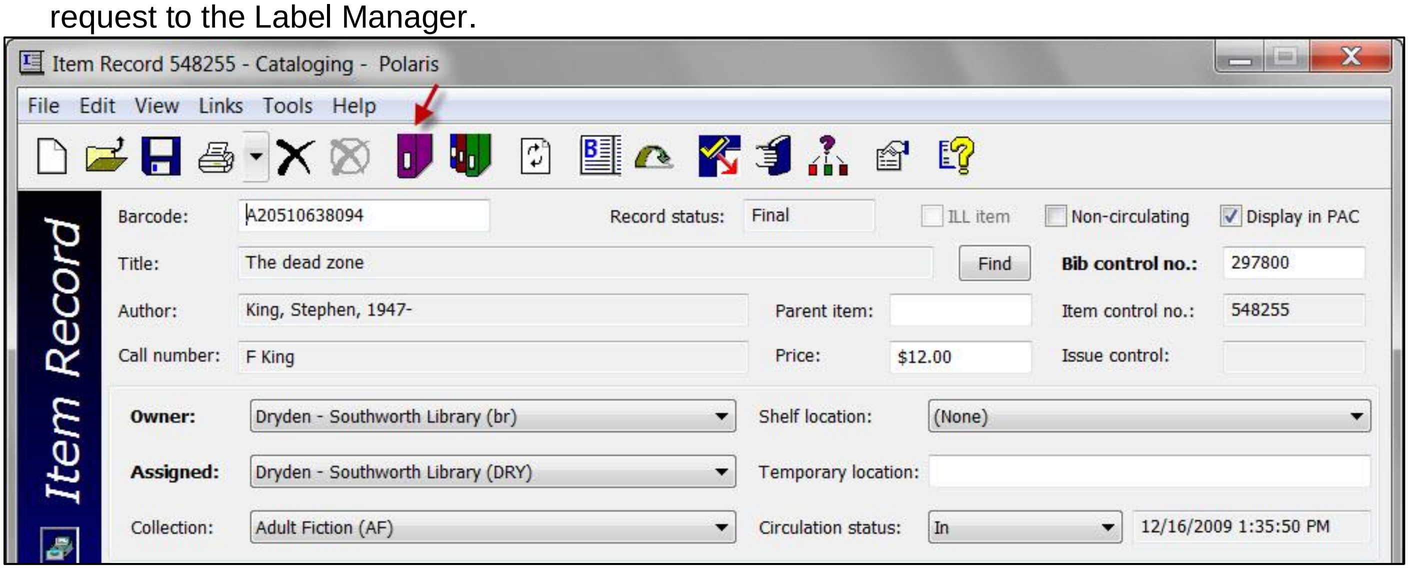
Creating a Spine Label

It is a good idea to clear the Label Manager before creating labels. Go to **Utilities ➔ Label Manager**. Select **File ➔ Clear** to clear the label and then **File ➔ Save**.

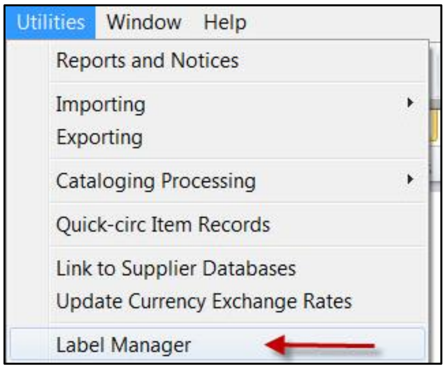


Now you will be able to start creating labels. If you are adding numerous records at a time, you can print all of those labels at the same time.

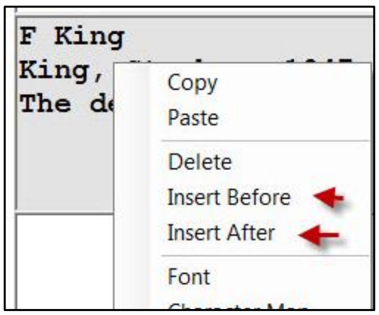
1. After adding your item record and saving it, left click on the label icon in the Item Record. See the arrow on the image on pg. 8.
2. Notice that "label requested" is displayed at the bottom of the work form. This sends the label request to the Label Manager.



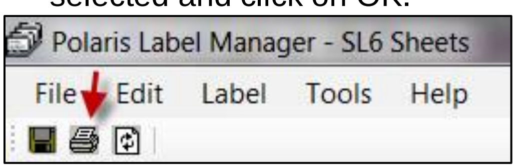
3. Open up Label Manager, located on the Polaris Shortcut Bar under the Utilities menu.



4. When you open up Label Manager, your label will be displayed there. If you need to delete a label or insert a blank one, right click on the label displayed, then left click on the appropriate command.

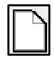


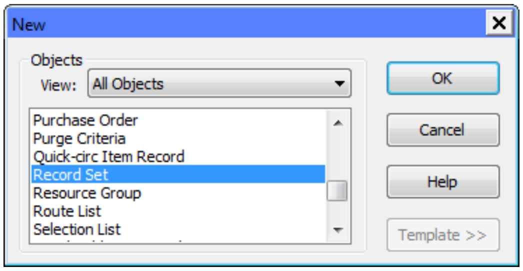
5. You might need to inset blank labels if you are using a previously used sheet of labels with some missing from the sheet.
6. You may need to delete a label if there is one displayed and you do not want to print it.
7. You can edit the label directly by typing and making any changes to the label displayed. Changes to the label do not update the Item Record.
8. When you are happy with the way it looks and are ready to print, simply click on the printer icon located above. A Printer dialog box will display. Make sure you have the right printer selected and click on OK.



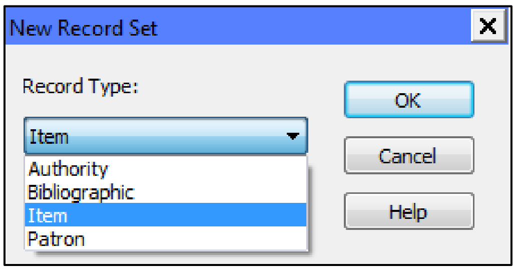
If you have more questions about Label Manager settings, or you would like to purchase a label printer, contact Rex: rhelwig@flls.org or 607-273-4074 x240.

Item Record Sets

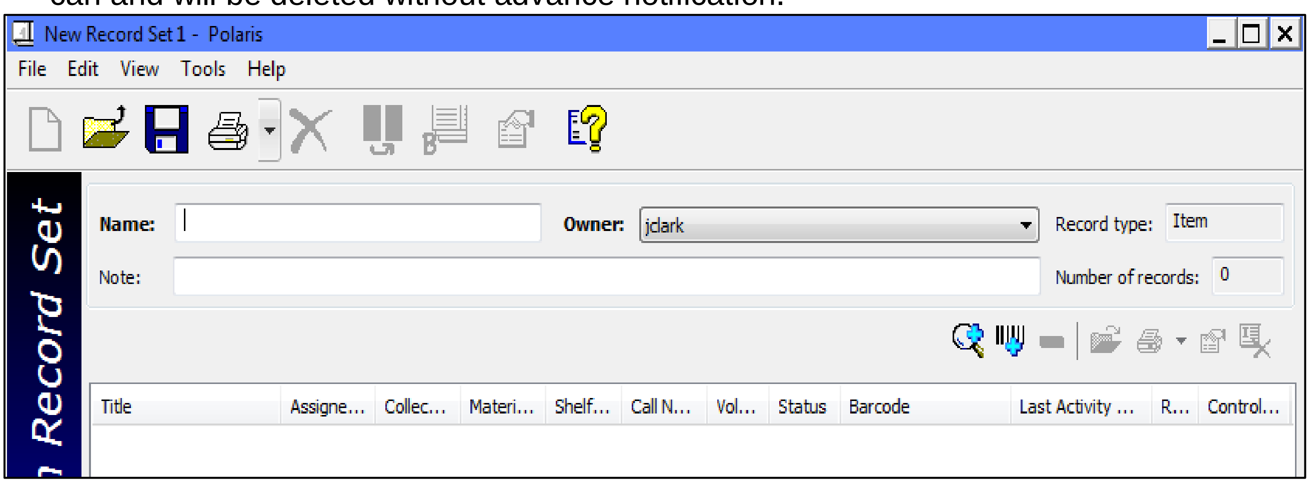
1. Go to File ➔ New or click the New button. 



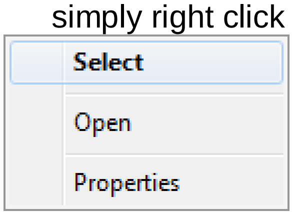
2. Select **Record Set** and click on **OK.**
3. Select **Item** and click **OK.**

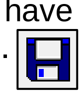


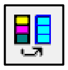
4. Enter a **Name** to identify this record set and any **Notes** you wish to enter. Follow the standard naming convention established by FLLS, *ex. CORT Description*. Improperly named record sets can and will be deleted without advance notification.



5. You may now add items to this record set by **Scanning** their barcodes. 
6. Or **Searching** for them using the Find Tool. 
7. To add an Item Record using the Find Tool, once you have searched for the item you may simply right click on the highlighted item in the list and left click on **Select.**

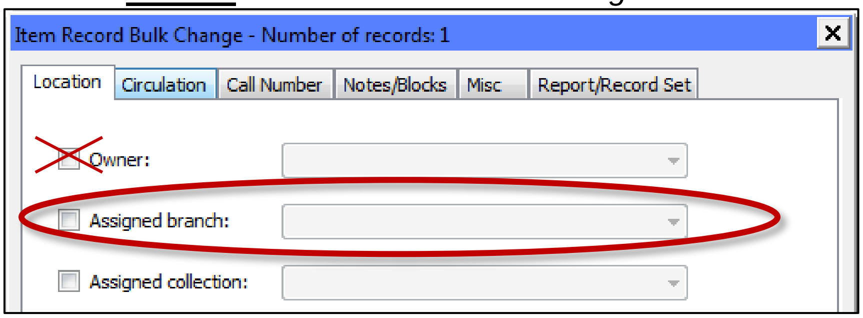


8. Once you have added all the item records to the record set, save the set by clicking on the **Save** icon. 

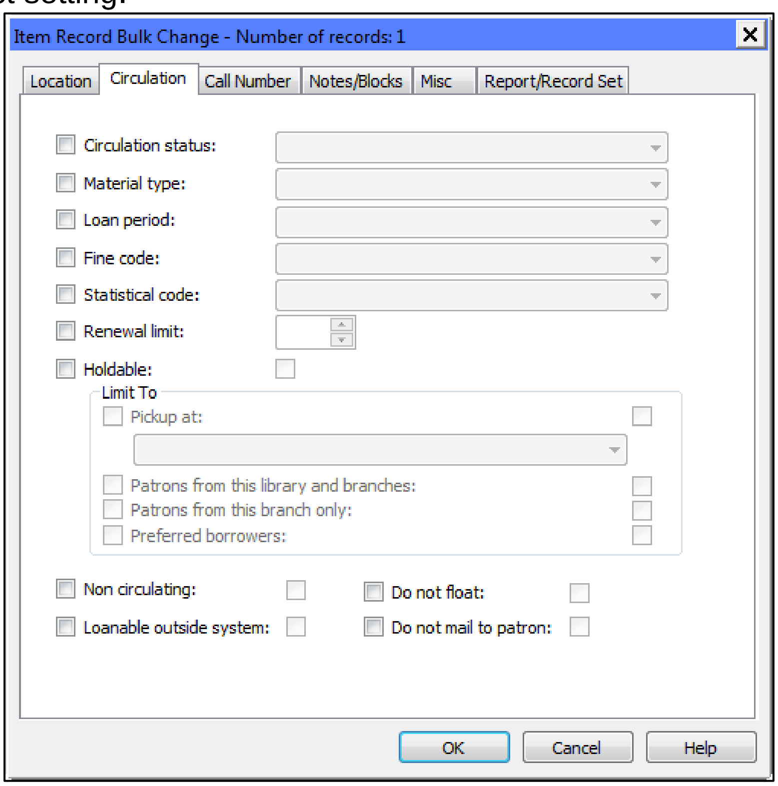
Bulk Change 

Bulk change allows you change the parameters of groups of items at the same time, rather than changing each record individually. First, create the record set. You may now bulk change the items by clicking on the **Bulk Change** icon (see above). The Item Record Bulk Change window will pop up. There are six tabs including Location, Circulation, Call Number, Notes/Blocks, Misc., and Report/Record Set.

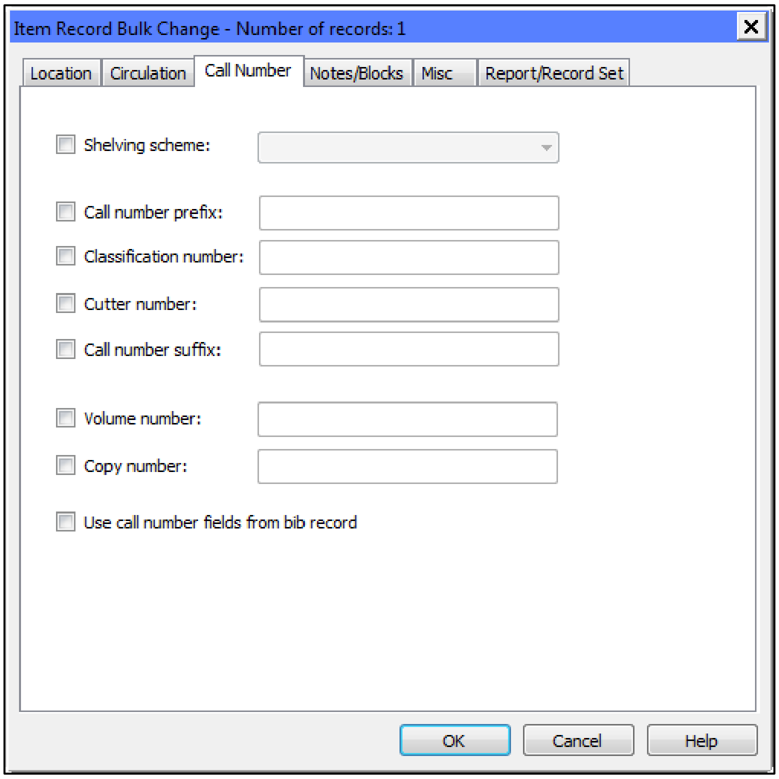
- **Location** tab: Click in the box next to **Assigned branch** and choose your library name only if you need to alter any of the features below it: assigned collection, shelf location, home branch, or temporary location. ***__NEVER__*** *use owner instead of Assigned Branch!*



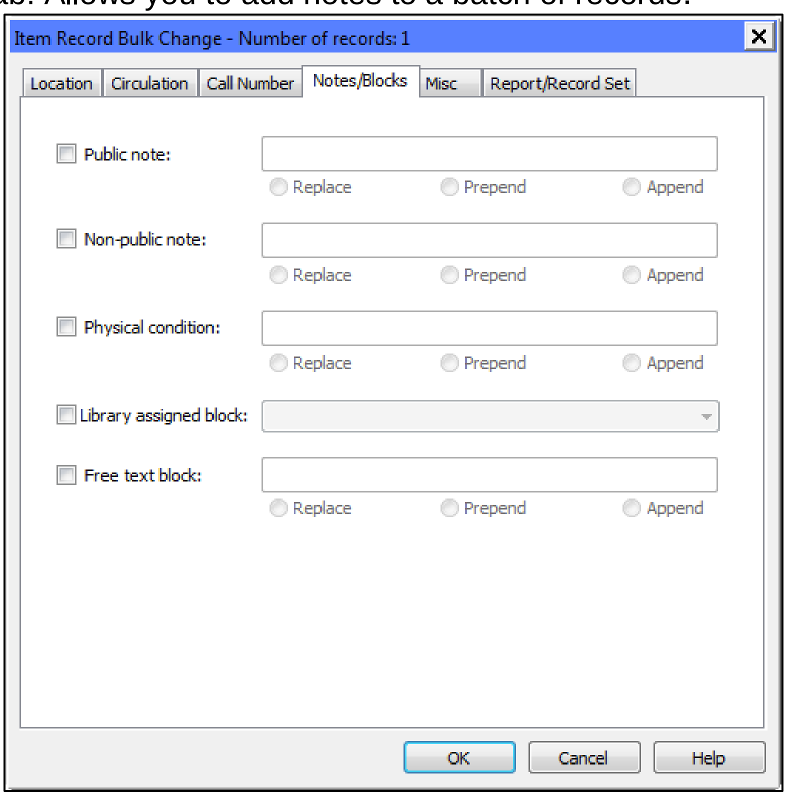
- **Circulation** tab: Click in each box to activate the drop down menu next to each parameter. Select the correct setting.



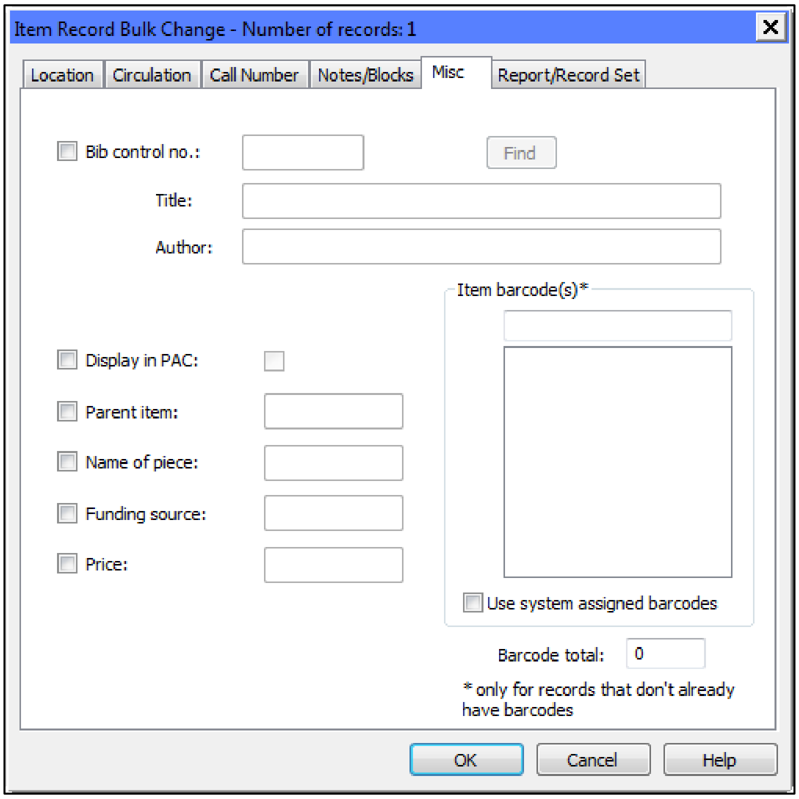
- **Call Number** tab: Would allow you to bulk change call numbers.



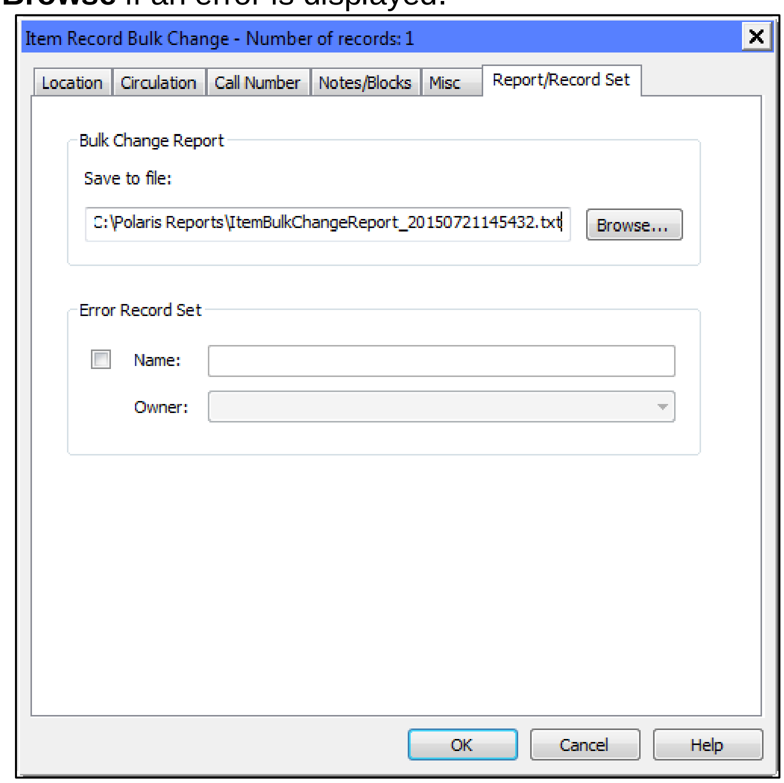
- **Notes/Blocks** tab: Allows you to add notes to a batch of records.



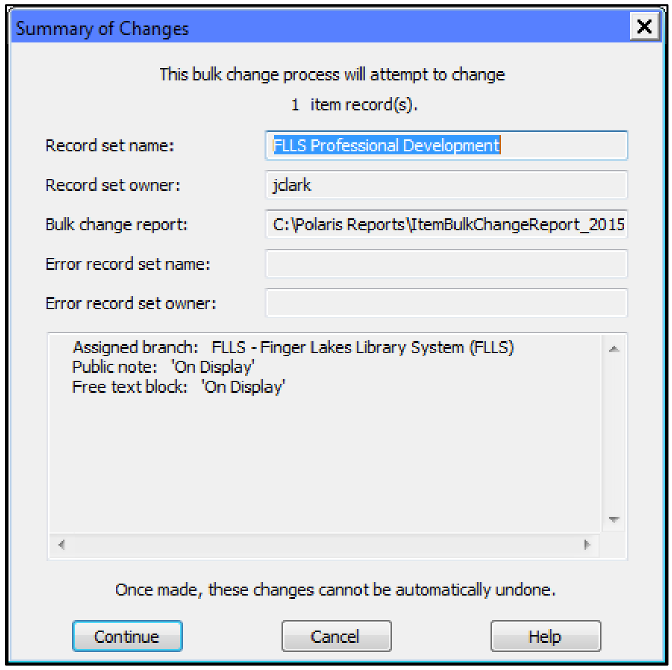
- **Misc.** tab: Allows you to bulk add a price to all records.



- The **Report/Record Set** tab is set up to produce a report of any errors encountered during the bulk change. A default file name is entered for you and the file can be found in the folder entitled **Polaris Reports/Bulk Change Reports** on your desktop. You may need to choose a file by selecting **Browse** if an error is displayed.



- Once all your parameters are set up, select **OK.**
- Click on **Continue.**



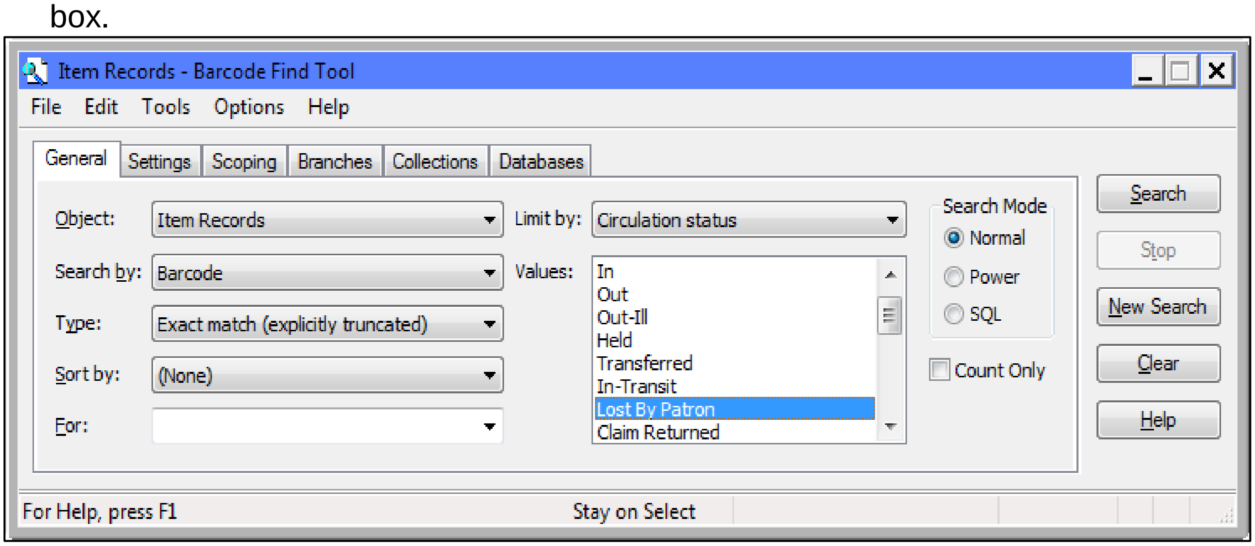
- A message will display telling you that the bulk processing is completed. Click on **OK** and check the error report if needed.

Creating Record Sets from a Search Results Window

You can also create a record set prior to conducting a search and the results from that search will automatically populate the record set. For example, you could retrieve all items owned by your library that have a status of Lost so you can delete them.

Here are the steps you would take to add them to a record set

- Bring up the Item Find Tool, **Cataloging ➔ Item Records** or **(Ctrl)+(Alt)+(F9)**
- Select **Barcode** in the *By* box.
- Type in the wildcard or ***** in the *For* box.
- Select **Circulation Status** in the *Limit By* box and then select **Lost by Patron** in the *Values* box.



- Select the **Branches** tab and limit to your branch.

- Select the **Settings** tab and check the box for "*Send Results to a New Record Set*."
- Enter a name for this Record Set. Remember to follow FLLS naming conventions. Ex. WAV Lost by Patrons.
- Increase the **Retrieval Limit** if you suspect your results may be more than the default 1000 records retrieved.
- Select the **Search** button.

A box will display informing you that a record set has been created and the number of records in that record set. Notice a time stamp has been added to the end of the name. You can elect to open the record set immediately and start working on it or select No and search for it later.

To search for this record set:

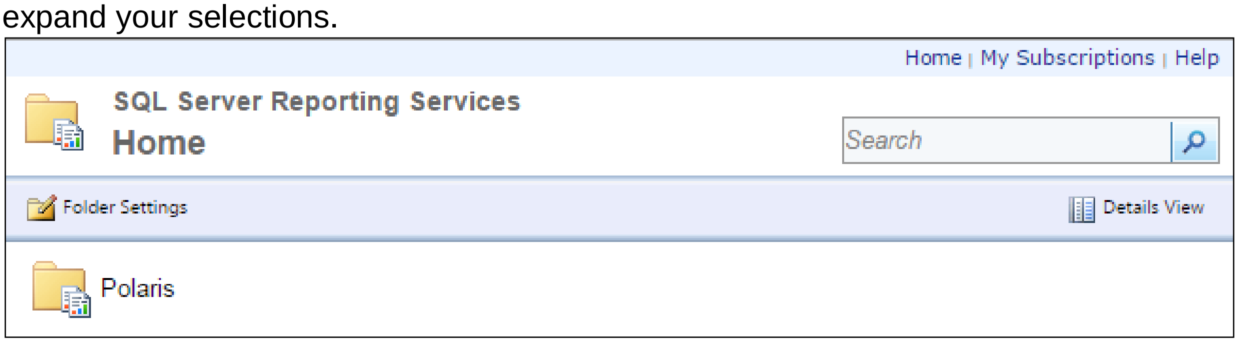
- Go to **Cataloging ➔ Record Sets.**
- Type in the name of the Record Set and the Record Set window displays.

Now you can delete all item records in the set. **Note:** Make sure that you want to delete the items from Polaris NOT just the record set.

- Retrieve all the records using your **(Ctrl)+(Shift)+(A)** command.
- Go to **Edit ➔ Select All**.
- Right click on the records and select **Delete**.
- A warning message will pop up asking you to confirm the action and will notify you of possible broken links.

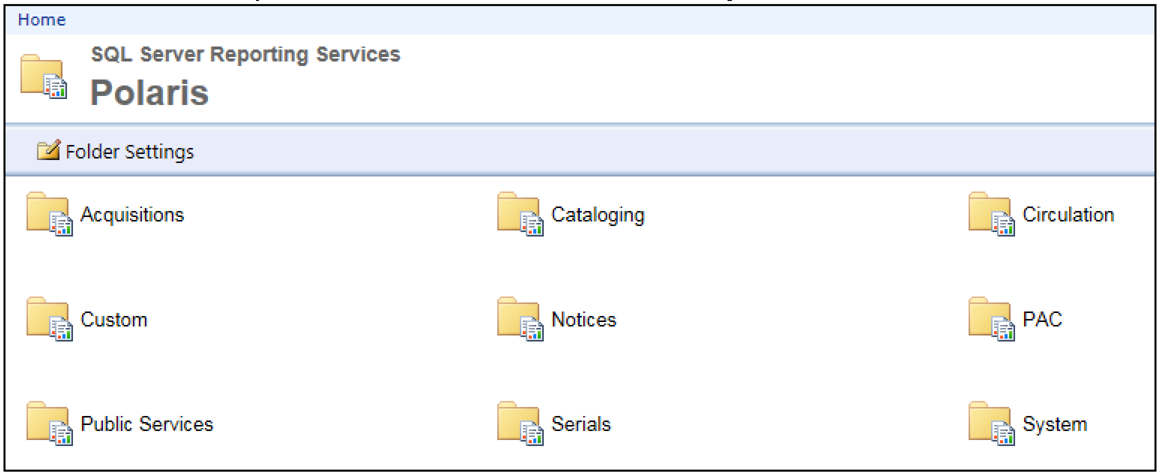
Web Reporting Basics

- You can log into the web reporting portal to view canned reports available in Polaris remotely from your Internet browser. It is recommended that you use the Internet Explorer browser.
- Visit the web reporting website: http://catalog.flls.org/reports. Login with the info for a specific Polaris client and be sure to include the FLLS domain. Ex., at Phillips Free Library, they would use homcirc@flls.org or flls\homcirc as the username.
- Click on Polaris folder to expand the folders available. Click on each subsequent folder title to expand your selections.

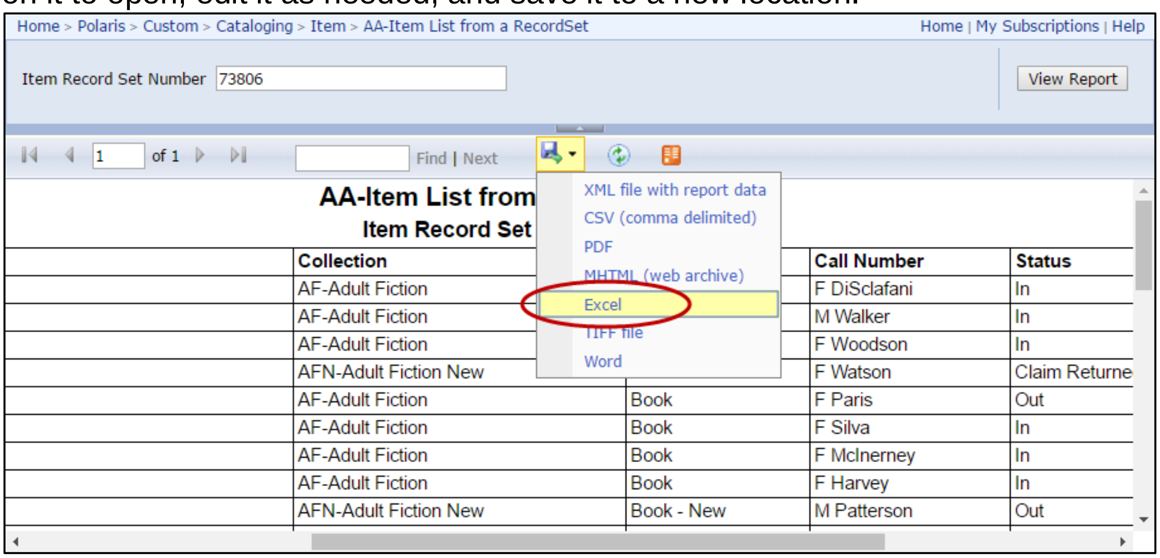


Sending a Record Set to Excel Using Web Reporting

1. Login to Web Reporting.
2. Locate your specific report. Use the report located here: **Custom ➔ Cataloging ➔ Item ➔ AA-Item List from Record Set**.
3. Enter the desired parameters and click on **View Report**.



4. Click on the floppy disk icon and choose **Excel**. The spreadsheet will download. You can click on it to open, edit it as needed, and save it to a new location.



Questions? Comments? **Contact:**

Jenny Shonk, Continuing Education and Outreach Librarian
Finger Lakes Library System
1300 Dryden Rd., Ithaca, NY 14850
(607) 319-5613 or jshonk@flls.org

FINGER LAKES LIBRARY SYSTEM

References: *Jan Aguirre, FLLS.*