



Cataloguing Procedures Manual

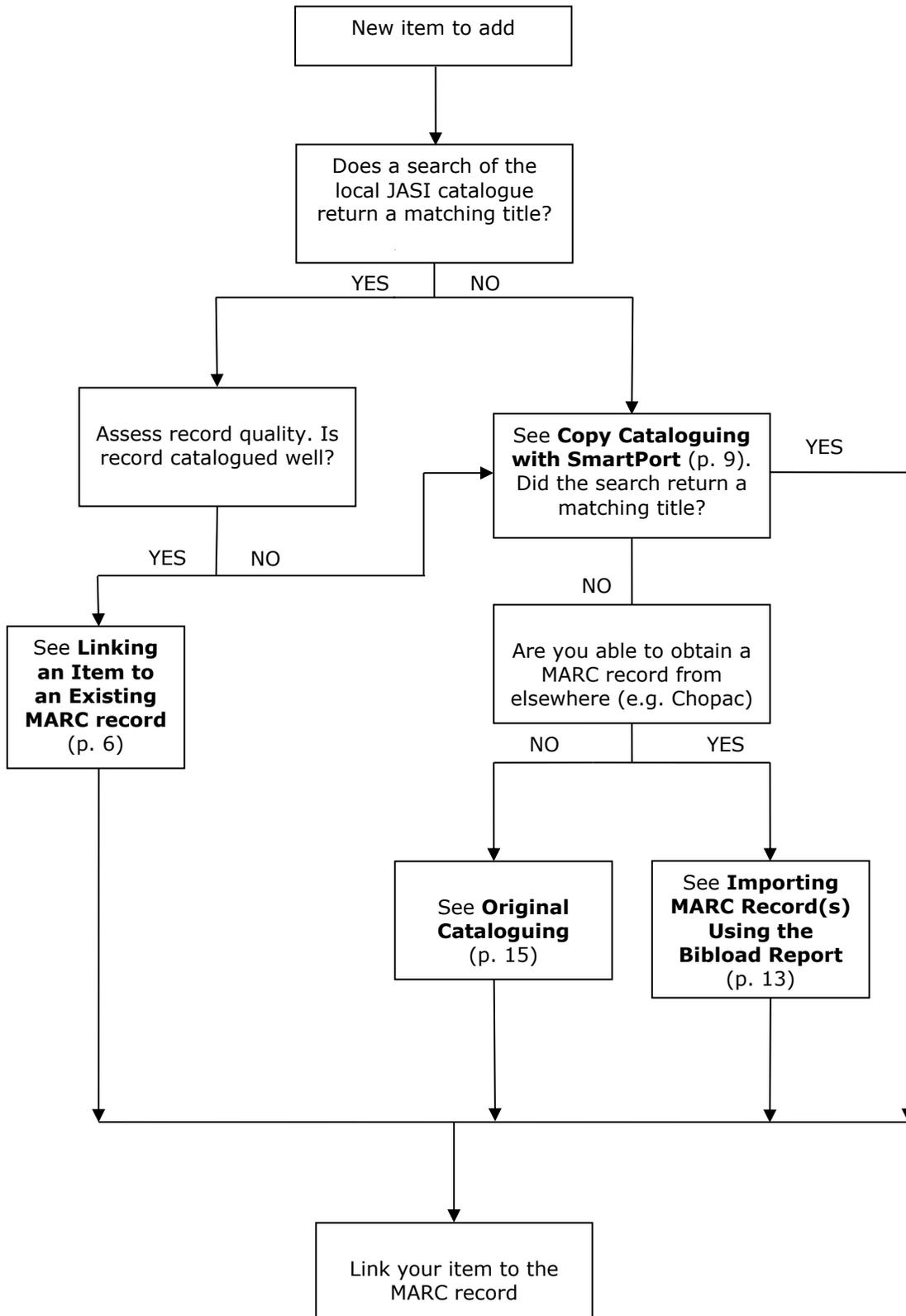
October 2015

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Overview

The purpose of this document is to provide you, as a JASI member, with the cataloguing standards and procedures for the consortium. Use the flowchart below as a visual guide to determine how to catalogue a new item.



Types of Cataloguing

1. Linking an Item to an Existing MARC record

This method involves linking an item to a MARC record that already exists in the local JASI catalogue to show that your library also holds it in its collection.

2. Copy Cataloguing via SmartPort

SmartPort uses the z39.50 protocol to search and import bibliographic records from other libraries' catalogues.

3. Importing MARC Record(s) Using the Bibload Report

The two-part MARC import and Bibload report method involves importing one or more MARC records into the local JASI database.

4. Original Cataloguing

This type of cataloguing is typically used to create a bibliographic record for which no other record in the catalogue exists.

Linking an Item to an Existing MARC record

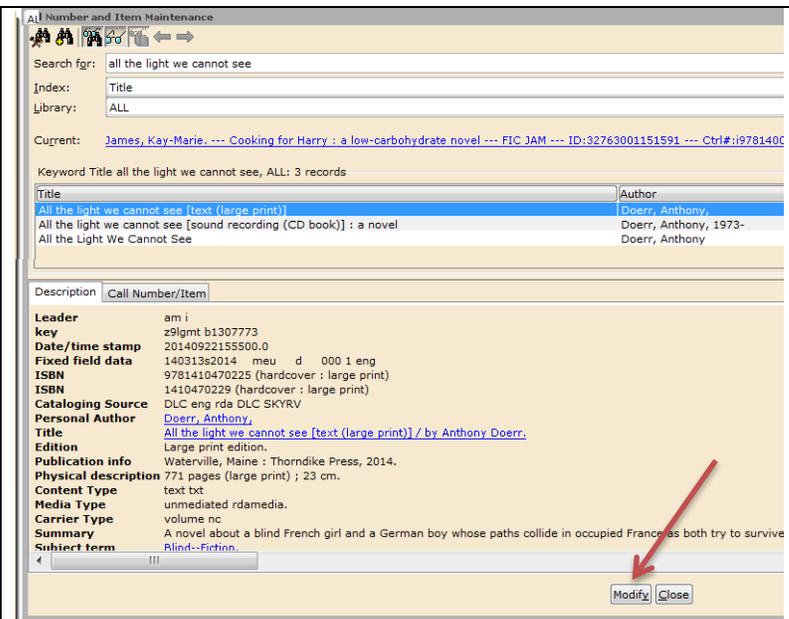
1. Find and open the **Call Number and Item Maintenance** wizard (located under **Common Tasks** in the left pane). If the Properties page appears, confirm defaults, make modifications (not generally required), and click **OK**.

2. In the **Search for** field enter the ISBN of the book (**without dashes**). If the item does not have an ISBN, enter the title of the book in the **Search for** field.

3. Change the **Index** field to **ISBN** and click **Search**. If the item does not have an ISBN, select **Title** from the drop-down menu.

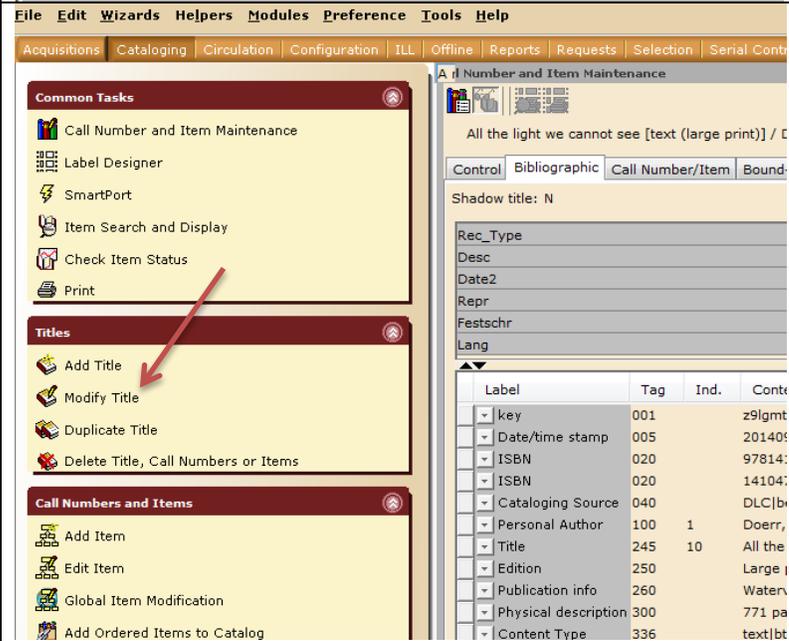
4. Select the MARC record to link your item to. Once you select it, the title will appear shaded, and its corresponding information will appear in the **Description** tab.

Click **Modify**.



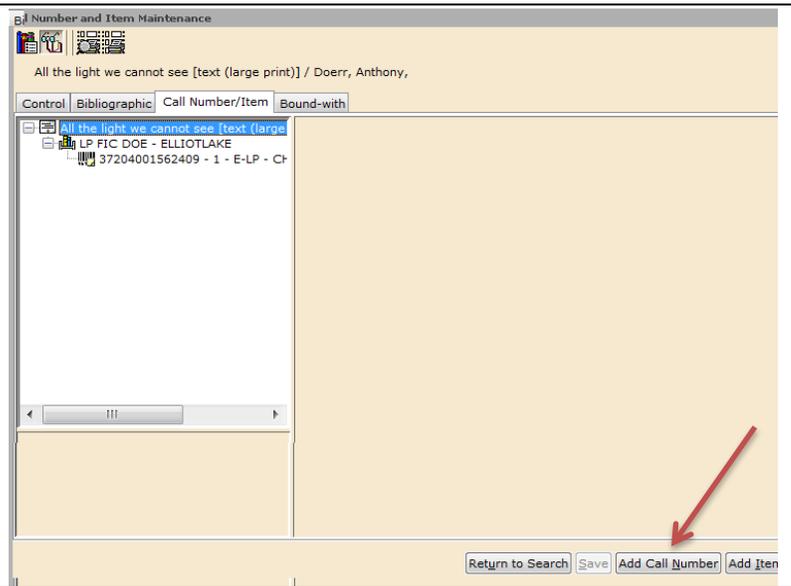
5. At this point, if the record is poorly catalogued, you **must** skip ahead to **Copy Cataloguing with SmartPort**. If a record requires only minor enhancements or corrections, use **Modify Title** wizard.

Note: for proper formatting of fields, consult [Appendix A – MARC Record Examples](#), or [MARC21 Format for Bibliographic Data \(www.loc.gov/marc/bibliographic/\)](#)



6. The item information now appears in the **Call Number/Item** tab.

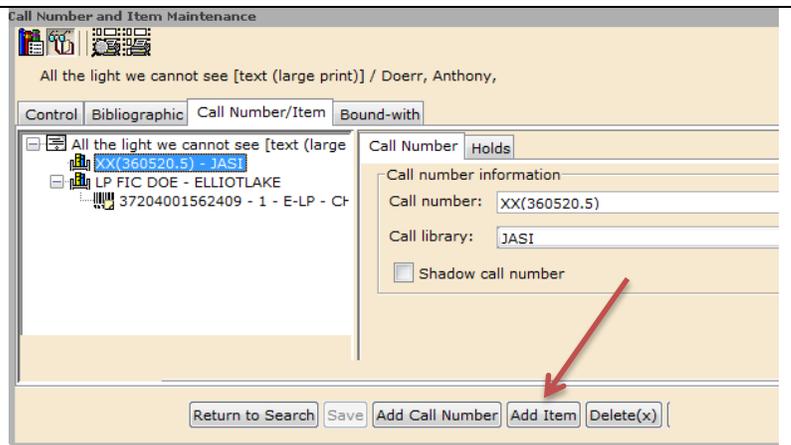
Click **Add Call Number** to link your item to the record to reflect your library's holdings.



7. The Library for New Call Number dialog box should appear. Select your library and click **OK**.



8. If an item is not automatically created, select the call number associated with *your* library in the call number/item tree (the top left-hand window), and click **Add Item**.



9. Modify the **Item Information** (Call number, Item ID, Type, Home location, Current location, Item cat1, etc.) as needed. Ensure that standards are followed for all materials of the same type in your catalogue.

Note: if unsure what to enter in any field, contact OLS-North for further assistance.

Click **Save**.

Number and Item Maintenance

All the light we cannot see [text (large print)] / Doerr, Anthony,

Control Bibliographic Call Number/Item Bound-with

Item Info Holds

Call number information

Call number: LP FIC DOE Class scheme:

Call library: JASI

Shadow call number

Item information

Item ID: Copy number:

Type: Professional collection Item library:

Home location: Reference Material Current location:

Item cat1: Item cat2:

Item cat3: Item cat4:

Item cat5: Number of pieces:

Media desk: Price:

Total charges: 0 Circulate

Permanent

Shadow item

Extended information

Tag Contents

CIRCNOTE

PUBLIC

STAFF

Return to Search Save Add Call Number Add Item Delete(x) Close

Date created: 1/2/2015

Date last charged: Never

Date due: none

Last discharged: Never

Date inventoried: Never

Times inventoried: 0

Previous user ID:

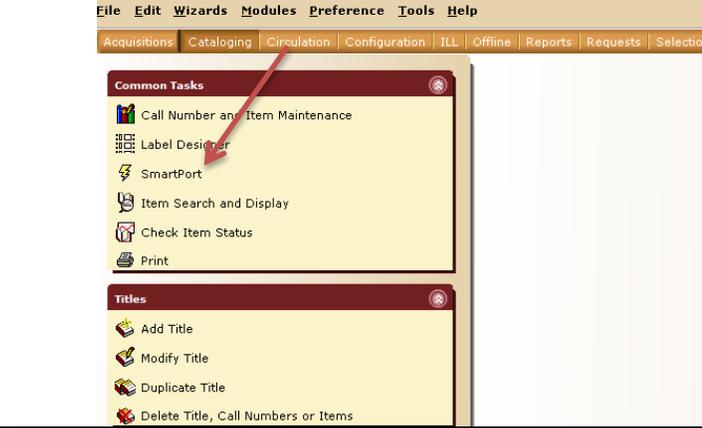
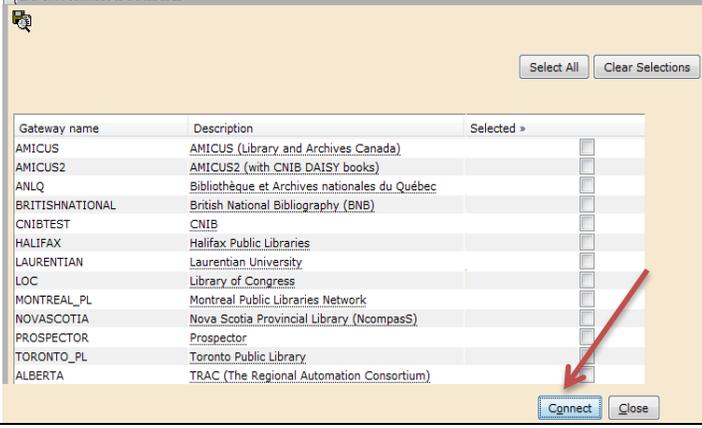
Last activity: Never

In-house uses: 0

Copy Cataloguing via SmartPort

SmartPort uses the z39.50 protocol to search other libraries' catalogues for bibliographic records that can then be imported into the local JASI database.

Note: before importing records with SmartPort, make sure to check the SmartPort **Properties** (right-click on **SmartPort** → **Properties**). **Match and Load** and **Match on Title Control Number** should be checked. The characters **ish** should be entered as the **Title Control Number Source**.

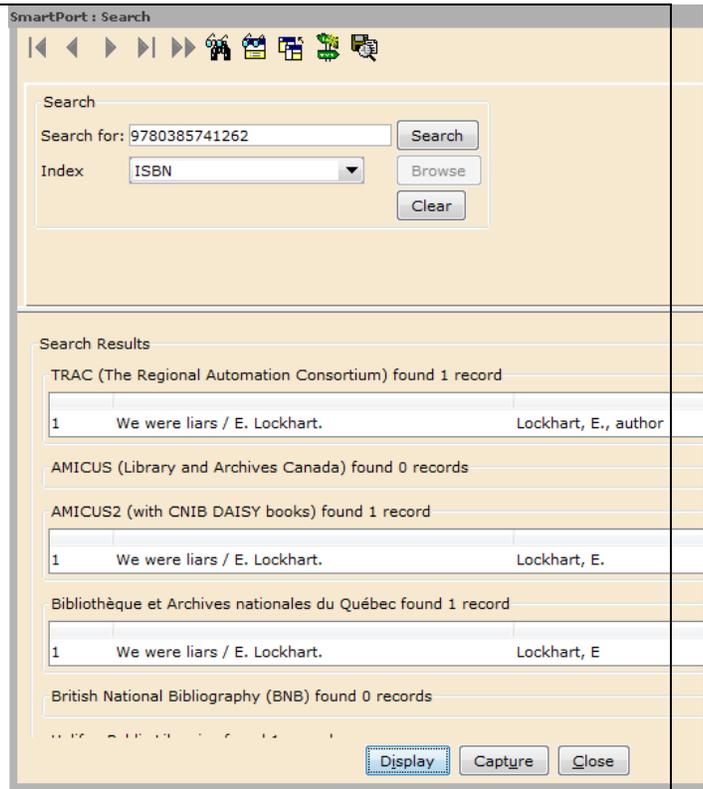
<p>1. Launch the SmartPort wizard.</p>																																											
<p>2. Select the SmartPort targets of your choice, ensuring that preference is shown to records from Library of Congress. Click Connect at the bottom of the screen.</p>	 <table border="1"><thead><tr><th>Gateway name</th><th>Description</th><th>Selected ></th></tr></thead><tbody><tr><td>AMICUS</td><td>AMICUS (Library and Archives Canada)</td><td><input type="checkbox"/></td></tr><tr><td>AMICUS2</td><td>AMICUS2 (with CNIB DAISY books)</td><td><input type="checkbox"/></td></tr><tr><td>ANLQ</td><td>Bibliothèque et Archives nationales du Québec</td><td><input type="checkbox"/></td></tr><tr><td>BRITISHNATIONAL</td><td>British National Bibliography (BNB)</td><td><input type="checkbox"/></td></tr><tr><td>CNIBTEST</td><td>CNIB</td><td><input type="checkbox"/></td></tr><tr><td>HALIFAX</td><td>Halifax Public Libraries</td><td><input type="checkbox"/></td></tr><tr><td>LAURENTIAN</td><td>Laurentian University</td><td><input type="checkbox"/></td></tr><tr><td>LOC</td><td>Library of Congress</td><td><input type="checkbox"/></td></tr><tr><td>MONTREAL_PL</td><td>Montreal Public Libraries Network</td><td><input type="checkbox"/></td></tr><tr><td>NOVASCOTIA</td><td>Nova Scotia Provincial Library (NcompasS)</td><td><input type="checkbox"/></td></tr><tr><td>PROSPECTOR</td><td>Prospector</td><td><input type="checkbox"/></td></tr><tr><td>TORONTO_PL</td><td>Toronto Public Library</td><td><input type="checkbox"/></td></tr><tr><td>ALBERTA</td><td>TRAC (The Regional Automation Consortium)</td><td><input type="checkbox"/></td></tr></tbody></table>	Gateway name	Description	Selected >	AMICUS	AMICUS (Library and Archives Canada)	<input type="checkbox"/>	AMICUS2	AMICUS2 (with CNIB DAISY books)	<input type="checkbox"/>	ANLQ	Bibliothèque et Archives nationales du Québec	<input type="checkbox"/>	BRITISHNATIONAL	British National Bibliography (BNB)	<input type="checkbox"/>	CNIBTEST	CNIB	<input type="checkbox"/>	HALIFAX	Halifax Public Libraries	<input type="checkbox"/>	LAURENTIAN	Laurentian University	<input type="checkbox"/>	LOC	Library of Congress	<input type="checkbox"/>	MONTREAL_PL	Montreal Public Libraries Network	<input type="checkbox"/>	NOVASCOTIA	Nova Scotia Provincial Library (NcompasS)	<input type="checkbox"/>	PROSPECTOR	Prospector	<input type="checkbox"/>	TORONTO_PL	Toronto Public Library	<input type="checkbox"/>	ALBERTA	TRAC (The Regional Automation Consortium)	<input type="checkbox"/>
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<p>3. Select ISBN as the search index by selecting it from the drop-down menu. If no ISBN exists, select Title as your search index.</p>																																											
<p>4. Enter the ISBN of the item in the Search for field. Click Search.</p> <p>Note: Searching by title is not to be used unless no ISBN exists for the item. Should you find a previous edition of your item, it is <u>not</u> recommended to adjust the bibliographic record to match your item.</p>																																											

- If the search was successful, the title and author fields of each individual record will appear under the names of their corresponding z39.50 target.

Click **Display** to view the full bibliographic record.

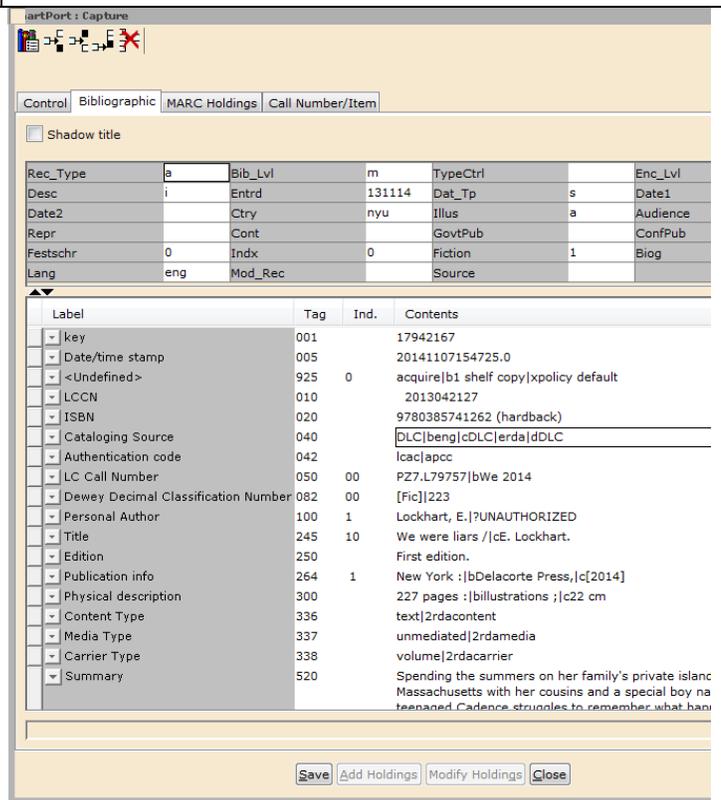
When you find the most complete and accurate record, click **Capture**.

Note: Both records compliant with Resource Description and Access (RDA) and Anglo-American Cataloguing Rules (AACR2) are equally acceptable



- Verify descriptive fields (1XX, 245, 250, 264, 300, 490) for accuracy. **Do not edit any fields in the record.**

Click **Save**.

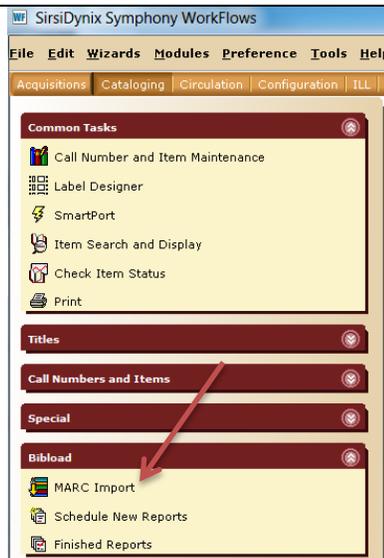


7. At this point, you **must** link your specific item to the MARC record. Refer to **Linking Your Item to an Existing MARC record** and follow all applicable steps.

Importing MARC Record(s) Using the Bibload Report

Step One – MARC Import

1. Launch the MARC Import wizard.

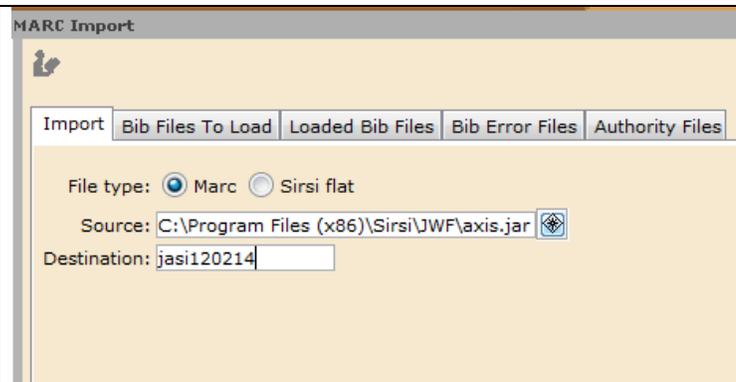


2. Confirm the defaults, and click *OK* at the bottom of the page.

3. Adjust the **File type** to **Marc**, if necessary.

Enter the file path for the file containing the MARC record(s) you wish to import by clicking on the **Select file** icon, located directly to the right of the **Source** field.

Create a file name and enter it in the **Destination** field. The file name should be easily recognizable. Consider 'LibraryNameDate,' e.g. 'JASI120214'.



4. Click **Import (b)** at the bottom of the page.

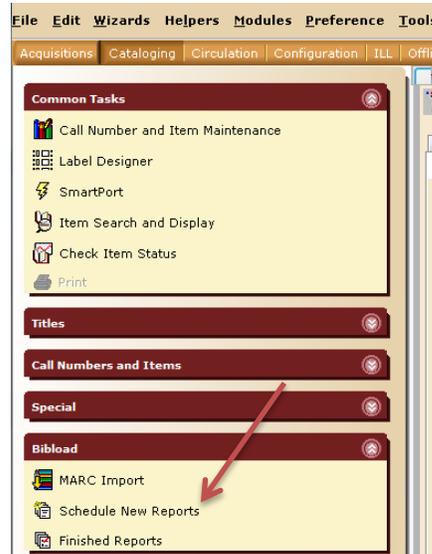
Click **No** when a pop-up window displays asking if there are 'more files to upload.'

A log file will appear. Review the text (i.e. check for errors) and close the document.

Step Two – Running the Bibload Report

1. Launch the **Schedule New Reports** wizard.

PLEASE NOTE: If your library does not already have a bibloader report template created specifically for your library, please contact the JASI Service Desk.



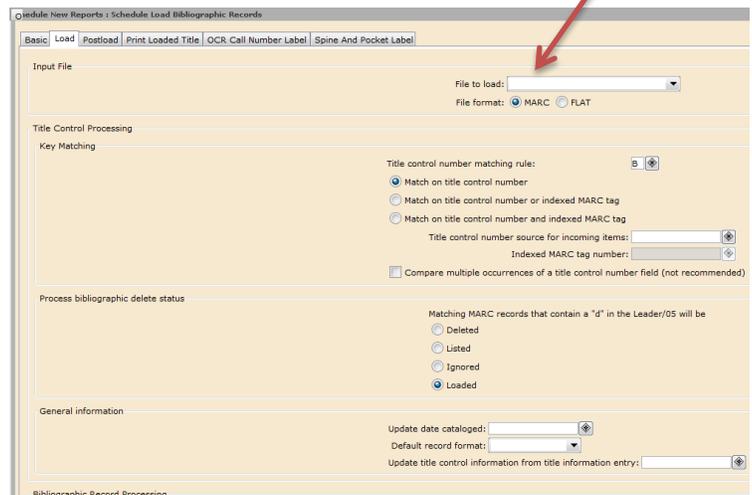
2. Select the bibload report created for you by the JASI Service Desk. Click on *Setup & Schedule* at the bottom of the page.

3. Go to the **Load** tab and complete the following:

Find the file you created with the MARC Import wizard in the drop-down menu in the **File to load** field.

Select **MARC** in the **File format** field.

Click **Run Now** on the bottom of the page. A report should display advising you that the individual bib record(s) have been imported into the local database.



4. At this point, you **must** link your specific item to the MARC record. Refer to **Linking Your Item to an Existing MARC record** and follow all applicable steps.

Original Cataloguing

Note: original cataloguing is only to be done when all other options have been exhausted, or in the following circumstances:

- when a brief record is needed for an item that is on-order or on loan from another library
- when no record can be found in the local JASI database or in **any** SmartPort source

1. Launch the **Add Title** wizard.



2. The **Set Properties** page will appear. Make the following adjustments:

From the drop-down menu in the **Format** field, select the record format that matches the format of your item (MARC Monograph **must** always be used for books)

From the drop-down menu in the **Entries template** field, select the type of template you would like to use to create a MARC record for your item. This will determine the MARC fields that will display in the MARC editor.

- **Template:** includes most common fields used
- **Full:** a more comprehensive list of fields
- **Brief:** only several fields
- **Select_entries:** allows a custom list of fields to be displayed

Make any remaining adjustments and click OK on the bottom of the screen.

- Click on the **Control** tab. Adjust the **Title control number** to correspond with the ISBN of the item in the following format: i9781234657981324 (if applicable)

- Click on the **Bibliographic** tab. Firstly, adjust the following leader fields: **Descr, Lang, Indx, Illus, Fiction, and Date1**. If unsure what to enter, right-click to determine appropriate values.

Rec_Type	a	Bib_Lvl	m	TypeCtrl		Enc_Lvl	
Desc		Entrd	141204	Dat_Tp	n	Date1	
Date2		Ctry		Illus		Audience	
Repr		Cont		GovtPub		ConfPub	0
Festschr	0	Indx	0	Fiction	0	Biog	
Lang	eng	Mod_Rec		Source	u		

For further information on leader codes, please consult [MARC21 Format for Bibliographic Data](#).

- Create the record by filling in all applicable fields.

Use the applicable sample record in [Appendix A](#) as a guide in the formatting of each field.

All records corresponding with a special edition (large print, book and CD packages, etc.) or a non-print item **must** have the appropriate General Material Designation (GMD) (245 |h) placed in the record (see [Appendix B](#) for a list of consortium-approved GMDs)

Fields **must** conform with RDA rules. Right-click in the **Contents** fields and select **MARC Help on LC** for further explanation and examples of how to format specific fields.

Remember that the pipe symbol (|) indicates a subfield delimiter. A

Label	Tag	Ind.	Contents
ISBN	020		
Dewey Decimal Classification Number	082	4	
Personal Author	100	1	
Title	245	10	Northern Ontario's path to greatness /lc
Edition	250		
Publication info	264	1	
Physical description	300		
Series Statement	490	0	
General Note	500		
Contents	505	0	
Summary	520		
Personal subject	600	10	
Subject term	650	0	
Series Added Entry-Uniform Title	830	0	

subfield delimiter **always** takes the place of a space (e.g. Robert Munsch’s worldview /|cLucy Kieffer). **Do not include subfield a (a) at the beginning of a field.**

Remember that nonfiction materials **require** a Dewey Decimal class number (082) and at least one subject heading (6XX). If you are unsure what to apply to your item, please contact OLS-North.

All name headings (fields 1XX , 240, 490, 6XX, 7XX, 830) **must be authority-controlled.** Use local database, Library of Congress, or Library and Archives Canada to find authorized forms of names. Establish authorized forms of names for local authors.

Once you are finished creating the record, click on **Call Number/Item** to edit item-level information, including Call number, Item ID, Type, Home location, and Item cat1, etc.

When finished, click **Save** at the bottom of the page.

Appendix A – MARC Record Examples (RDA)

The following bibliographic records show how MARC fields are formatted and what the indicators signify for several popular formats.

For a comprehensive explanation of MARC fields and indicators, consult the Library of Congress' MARC21 Format for Bibliographic Data: <http://www.loc.gov/marc/bibliographic/>

Monograph (book)

010 2014395398
020 9781451661989
082 04 616.85/212|223
100 1 Percy, Jennifer,|eauthor.
245 10 Demon camp :|ba soldier's exorcism /|cJennifer Percy.
250 First Scribner hardcover edition.
264 1 New York :|bScribner,|c2014.
300 xi, 223 pages ;|c24 cm.
336 text|2rdacontent
337 unmediated|2rdamedia
338 volume|2rdacarrier
505 0 A brief history of the disorderly conduct of the heart -- War dreams --
 We kill ourselves because we are haunted -- I am the voice in the night -- A
 postscript for the irritable heart.
600 10 Daniels, Caleb|xMental health.
650 0 Post-traumatic stress disorder|vCase studies.

Graphic Novel

100 1 Roman, Kelly,|eauthor.
245 14 The art of war :|ba graphic novel /|cby Kelly Roman ; illustrated by
 Michael DeWeese ; [lettered by Jason Arthur ; Sun Tzu's The art of war translated by Lionel Giles].
250 First edition
264 1 [Place of publication not identified] :|bHarp Perennial,|c2012.
264 4 ©2012
300 346 pages :|bchiefly illustrations, maps ;|c23 cm.
336 text|2rdacontent
337 unmediated|2rdamedia
338 volume|2rdacarrier
500 Accompanying text translated from: Sunzi bing fa.

E-Book

- 100 1 Macdonald, Roderick,|d1952- |eauthor.
245 10 Genesis of the financial crisis /|cRoderick Macdonald.
264 1 New York :|bPalgrave Macmillan,|c2012.
264 4 ©2001
300 1 online resource (xi, 178 pages) : |billustrations.
336 computer dataset|2rdacontent
337 computer|2rdamedia
338 online resource|2rdacarrier
588 Description based on print version record.
504 Includes bibliographical references and index.

DAISY Book

- 100 10 Clahoun, Mary,|eauthor.
245 10 Cross-country cat|h[sound recording (DAISY)] /|cby Mary Clahoun.
264 1 Toronto :|bCNIB,|c2012.
300 1 sound disc (18 hrs., 55 min.) :|bdigital ;|c4 3/4 in.
336 spoken word|2rdacontent
337 audio|2rdamedia
338 audio disc|2rdacarrier
505 0 When he becomes lost in the mountains, a cat with an unusual ability of walking on two legs finds his way home on cross-country skis.
511 0 Narrated by Pat Dorey.
538 DAISY 2.02 standard; MP3 compression at 32 kbps.
650 0 Cats|vJuvenile fiction.
650 0 Cross-country skiing|vJuvenile fiction.
700 Elliott, Ken,|enarrator.

DVD

- 024 054599196774
245 04 The Pink Panther|h[videorecording (DVD)] /|cMetro Goldyn Mayer Pictures and Columbia Pictures presents ; a Robert Simons production ; a Shawn Levy film ; produced by Robert Simonds ; directed by Shawn Levy.
250 Special edition

264 1 Culver City, California :|bSony Pictures Home Entertainment,|c2006.
 300 1 videodisc (ca. 93 min.) ;|c4 3/4 in.
 336 two-dimensional moving image|2rdacontent
 337 video|2rdamedia
 338 video disc|2rdacarrier
 511 1 Steve Martin, Kevin Kline, Jean Reno.
 546 Closed-captioned; dialogue in English (5.1 Dolby Digital) or French (5.1 Dolby Digital) with optional subtitles in English or French.
 650 0 Clouseau, Inspector (Fictitious character)|vDrama.
 700 0 Martin, Steve,|d1945-
 700 0 Kline, Kevin.
 700 0 Reno, Jean,|d1948-

Audiobook (CD)

100 1 Williams, Carol Lynch.
 245 14 The chosen one :|ba novel|h[sound recording (CD book)] /|cCarol Lynch Williams.
 260 New York :|bMacmillan Audio,|cp2009.
 300 5 sound discs (5 hr., 30 min.) :|bdigital ;|c4 3/4 in.
 336 spoken word|2rdacontent
 337 audio|2rdamedia
 338 audio disc|2rdacarrier
 490 0 Macmillan young listeners audiobook
 500 Unabridged.
 511 0 Read by Jenna Lamia.

For other examples of MARC records in other formats, consult any of the following online catalogues:

Library of Congress: <http://catalog2.loc.gov/>

Library and Archives Canada: <http://amicus.collectionscanada.ca/aaweb/aalogine.htm>

Toronto Public Library: <http://www.torontopubliclibrary.ca/>

Regional Automation Consortium: <http://www.tracpac.ab.ca/>

Appendix B – General Material Designations

Note: this list only reflects the most common formats. It is *not* exhaustive. For a complete list, visit jasinorth.ca.

Field 245 h	
Material	GMD
DVD	[videorecording (DVD)]
Blu-ray	[videorecording (Blu-ray)]
Audiobook on CD	[sound recording (CD book)]
Large print book	[text (large print)]
DAISY book	[sound recording (DAISY)]
Audiobook on Playaway	[sound recording (Playaway)]
Audio CD	[sound recording (CD)]
Equipment	[equipment]
Book, CD package	[sound recording (book and CD)]