

Maine Balsam Libraries

Copy Cataloging Training Session June 20th, 2024

Created by:

Hannah Stevens, Technical Service Librarian, Thorndike Library, College of the Atlantic

Andrea Koltai-Price, Technical Service Librarian, Thompson Free Library

What is Copy Cataloging?

Copy Cataloging is the process of finding pre-existing records and importing them into the Balsam catalog using Z39.50. The primary source of records in the US is OCLC.

1. Importing & Z39.50
 - a. Default service & Credentials
 - i. Library of Congress
 - ii. MaineCat
 - iii. Prospector (Colorado)
 - b. Search Values
 - i. ISBN
 - ii. If no results, try searching by Title & Author (Last name, First name)
 - c. View MARC
 - i. Highlight one result in the window and click on the View MARC tab.
 1. 020 to assure it's not an ebook record but a print material record (the ISBN for the print format needs to be the first ISBN listed in the MARC)
 2. 100 author
 3. 245 title
 4. 264 publishing information
 5. 300 physical description
 6. 490 series information
 7. 520 summary
 8. 650 topical subject
 9. 651 geographic subject
 10. 655 genre heading
 11. 800 series information
 - ii. Click Cancel to return to the previous display. Continue this process paying attention to the MARC fields and choose the most robust record.
 - d. Highlight the result you want and click Import
 - e. Click Go to Record and add holdings.

- f. Click Marc Edit
 - i. Remove unwanted fields (mainly 9XX fields).
 - g. Add Holdings

2. Check the Audience fixed field which helps patrons know the target audience associated with materials and makes children's materials appear in the KPAC.
 - a. Click MARC Edit
 - b. Click Enhanced MARC Editor
 - c. Right click on Audn box and choose selection from menu that appears
 - i. a — Pre-School (infant to 5 years)
 - ii. b — Primary (6-8 years)
 - iii. c — Pre-Adolescent (9-13 years)
 - iv. d — Adolescent (14-17 years)
 - v. e — Adult
 - d. Click Save Changes

3. Check the icon is correct: Icons help patrons identify the item in the correct format they are seeking, such as an audiobook or a large print book.
 - a. Visit the website for directions on how to change them if needed:
<https://balsamevergreen.org/icons/>

4. Merging & Use of a Single Bibliographic Record (example: *The Beekeeper's Apprentice*)
 Books with the exact same content and in the same format (ie, large type, regular print, DVD, or audiobook) should be on the same bibliographic record, even if features such as binding, publisher, size, and pagination are different.
 - a. **Do use a single bibliographic record** for books **when content is exactly the same** such as:
 - Hardcover, trade paperbacks, and mass market paperbacks
 - Different publishers and publication dates
 - Add a note field: =500 \\\$aPublisher, dates, and paging may vary.
 - Different size and pagination
 - Autographed books (add a copy note on the item record)
 - b. **Do NOT** use a single bibliographic record for books **when the items differ from one another** in the following ways:
 - Editions with different content such as special editions, revised editions, illustrated editions.
 - Different print sizes such as large print versus regular print

- Large print books are to always have a separate bibliographic record
- Classics that include a special foreword or analysis
- Different illustrators or translators
- Different formats such as e-books and audiobooks

5. Overlaying (ex: *When the Bough Breaks* by David Mark)

If you find a record that needs to be updated you can overlay the record very simply.

- a. Click Mark for: and select Overlay Target.
- b. Click Cataloging and select Import Record from Z39.50 to search for a better record
- c. View MARC
 - i. Highlight one result in the window and click on the View MARC tab.
 1. 100 author
 2. 245 title
 3. 264 publishing information
 4. 300 physical description
 5. 490 series information
 6. 520 summary
 7. 650 topical subject
 8. 651 geographic subject
 9. 655 genre heading
 10. 800 series information
 - ii. Click Cancel to return to the previous display. Continue this process paying attention to the MARC fields and choose the most robust record.
- d. Click Overlay.
- e. The record you want to overlay is on the left and the new record is on the right. Click Edit Z39.50 Record.
- f. Delete 9xx fields and any other unwanted fields like 856 and click Save.
- g. Back at the Overlay record? Interface, scroll down and click Overlay.
- h. The program will open a new tab with the updated record.

6. Alternative Overlay steps from Andrea Koltai-Price

- a. Search the ISBN in Z39.50
- b. Select local record for overlay
- c. Choose and select a stronger record
- d. Select Overlay
- e. Choose the Balsam overlay template

- f. The record you want to overlay is on the left and the new record is on the right.
Click Edit Z39.50 Record.
- g. Delete 9xx fields and any other unwanted fields like 856 and click Save.
- h. Back at the Overlay record? Interface, scroll down and click Overlay.
- i. The program will open a new tab with the updated record.

Further Resources

Balsam Website Cataloging documentation: <https://balsamevergreen.org/resources/#docu>

Copy Cataloging Balsam Youtube video: <https://youtu.be/8bv6zH7-M1U>

Self-Directed Learning

NC Cardinal (North Carolina-based Evergreen Consortium) Bibliographic Cataloging Training Slides & Videos: <https://nccardinalsupport.org/index.php?pg=kb.page&id=134>

Bibliographic Formats and Standards: <https://www.oclc.org/bibformats/en/home.html>

For Help Contact Cataloging Committee Members:

Andrea Koltai-Price, andrea.tflibrary@gmail.com | 207-564-3350

Hannah Stevens, hstevens@coa.edu | 207-801-5662