

Maine Balsam Libraries

Item Cataloging Training Session May 10th 2024

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What is Item Cataloging?

Item Cataloging is the process of adding items to pre-existing records in the Balsam catalog.

What's our goal when item cataloging? To make the item available to patrons (and other Balsam libraries for ILL), to make it findable in the catalog, to have it represented by an accurate record.

In order to achieve all of these goals, we prioritize attaching items to the best matching available record - and sometimes there isn't a good enough record, so we set the item aside until we can access a better record.

We'll be using *Braiding Sweetgrass* and the *Harry Potter universe* as examples.

1. Searching Balsam for Records
 - a. Search by title
 - b. Search by title & author
 - c. Search by ISBN
 - d. Importance of searching multiple ways when looking for a best match (catalog database is reading the MARC records for the search terms you use; if that info is not in a record the record will not be included in search results)
2. Assessing Search Results for Best Match
 - a. Catalogers use a set of rules that guide the formatting of records, these little details make a huge difference to patrons and librarians when using the catalog. These details play a role in identifying the best record available:
 - i. Older records vs new records
 1. 260 vs 264 fields
 2. 380 p. vs 380 pages
 - ii. If available, choose a record with the same number of pages, publisher, and publishing date as your item.
 - iii. If more than one record with matching pages, publisher, and date, choose the record with the most holdings attached to it - or - choose the newer record with RDA formatting (words are spelled out, not abbreviated).
 - b. What is a MARC Record?
 - i. Bibliographic records or MARC (**M**achine **R**eadable **C**ataloging) records represent and translate bibliographic information so the data will be readable, searchable, and sortable in a database like Evergreen.

- ii. The MARC is the computerized form into which catalogers enter the information needed for the computer catalog. This form has a potentially very high number of fields, each with a specific purpose, and each field has its own specific formatting options and requirements.
 - iii. Use the Staff View tab to review the item details when finding your best match. If needed, use MARC View for a deeper look at the cataloging details (some details may be entered in the MARC but not visible in the Staff view). The information most important for basic item cataloging is found in the following MARC fields:
 - 1. ISBN, ISSN, UPC - 020, 024
 - 2. Author - 100, 245, 700
 - 3. Title - 245, 246
 - 4. Publisher, publishing date - 264 (older records 260)
 - 5. Pages or discs, illustrations - 300
 - 6. Item Summary - 520
 - 7. Notes (used for various purposes) - 500
 - 8. Format is defined in field 008, the Fixed Field. In Balsam cataloging, information for 008 is entered in the Enhanced MARC editor. This is only done by catalogers working at the copy cataloging level. But the information entered here, as well as in field 007, determines what icons are visible in the catalog.
 - c. Understanding a Best Match: <https://balsamevergreen.org/use-of-a-single-bibliographic-record/>
 - i. Large Print, Audio, Video, regular print, all need to remain separate
 - 1. Use icons and item descriptions (fields 300, 500, 520) to find records for the type of item in your hand
 - 2. Ignore cover images at this stage
 - ii. Dates may vary, publisher may vary, content should be the same as long as the format is the same (fields 264/260, 500)
 - iii. Read over the Staff View tab including the Item Summary and any Notes to determine whether your item's content matches the content described by this MARC record. Content in this context refers to: the body of the text (the story), foreword, introduction, afterword, index, bibliography, illustrations. Cover images don't matter. Excerpts from other titles by the author usually don't matter. Cover information other than the title usually doesn't matter. Think about whether any differences in these areas will matter to your patron. The answer will likely vary depending on what you have in your hand. **If your item has an introduction, foreword, afterword, illustrations, or other content by another author, you must look at the 245 and 700 fields in MARC View to determine whether this MARC record matches your item.**
3. Adding Items (Adding Holdings)
- a. Templates (preferences tab in holdings editor, then build and save templates); one on one sessions if you need help, should have been done when Evergreen was set up, is anyone unfamiliar with templates?
 - b. Enter call number & barcode, apply template and fill in fields as needed

- c. When adding a newly published item, check the release date. If the item hasn't been released yet, the Copy Status field must not be set to Available. (When the release date arrives, you can Check In the item and the status will change to Available.)

4. Replacing Barcodes

When your item has lost its barcode, or you are replacing a lost item, and you want to retain the circulation history.

- a. Andrea uses Item Status
 - i. Cataloging →Item Status
 - ii. Scan barcode
 - iii. Right click and select Replace Barcode, or choose Replace Barcode from the Actions menu
- b. Hannah uses Holdings view
 - i. Select two rows: Call number (click dropdown arrow for row with barcode) and barcode
 - ii. Right click or Actions for selected rows
 - iii. Under Edit, click replace barcode

5. Deleting Items

When you are removing your holding from the catalog for any reason.

- a. Andrea uses Item Status
 - i. Cataloging →Item Status
 - ii. Scan barcode
 - iii. Right click and select Delete Item, or choose Delete Item from the Actions menu
- b. Hannah uses Holdings View
 - i. Search → Search for Item by Barcode
 - ii. Scan barcode
 - iii. Click on title to go to the record
 - iv. Select two rows: Call number (click dropdown arrow for row with barcode) and barcode
 - v. Right click or Actions for selected rows
 - vi. Under Edit, click Delete Call Numbers & Items

Further Resources

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

Item Cataloging Balsam Youtube video: <https://youtu.be/oF6J-nm4wDQ>

Self-Directed Learning

NC Cardinal (North Carolina-based Evergreen Consortium) Item Cataloging Training Slides & Videos:

<https://nccardinalsupport.org/index.php?pg=kb.page&id=128>

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

For Help Contact Cataloging Committee Members:

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