Main Library Alliance Technical Services Manual

Last Revised: March 14, 2024

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Introduction

This manual was compiled to assist Main Library Alliance (Main) member libraries in following consistent procedures when preparing materials for circulation. The information is meant to provide guidelines for the technical services staff on basic policies and best practices.

Materials preparation involves both physical processing, such as barcodes, spine labels, jackets, etc, as well as linking items to the Main catalog. It is important that this preparation is done consistently and correctly so that the patron experience when searching the catalog is easy and successful.

Check the Tech Services Advisory Group location of the Main Staff website for important, helpful and up-to-date information. Leap tips, training videos, Tech Tips, Cataloguing Request procedures and On-Order requests information can be found there.

Handbook Revisions

This handbook details, supports, and in some cases expands upon, the Main Library Alliance Bylaws and Policy Manual agreed upon by the Main Library Alliance Membership. The stewardship of this handbook is the responsibility of the Technical Services AG, but due to its status as the sanctioned governing body of Main Library Alliance, the Main Library Alliance Board of Directors reserves the right to unilaterally amend this handbook via formal action at a Main Library Alliance Board of Directors meeting.

Revisions to this handbook are tracked in the Revision History section at the end of the document.

Part I: Getting Started

Logging On and Off
Leap App based program, current and easiest method to link materials
- Login - Navigate to staff.mainlib.org and click on the button 'Use Leap' on the homepage or links in other areas of the website. This will bring you to the login page, follow the prompts to enter your username and password and then select your workstation. It's recommended that the login page be bookmarked to access it more easily.
- Logout – Close out of all open records. Navigate to the top right corner, click on your username, and select log out. An additional window will open to confirm that you want to log out.

Desktop Client (Polaris)
Only supported for tasks that cannot be completed in Leap (creating and editing templates). Part II: Item Templates
Login - Click on the Start button, navigate to the Polaris Resources application folder, and click on Polaris (Production). When it opens, enter your username and password. There may also be an icon on your desktop. If accessing through the Start Menu, it can also be pinned.
- Logout - Click on the Start button, navigate to the Polaris Resources application folder, and click on Logoff Polaris Server. There may also be an icon on your desktop. If accessing through the Start Menu, it can also be pinned.

What's the difference between a bibliographic record and an item record?
- A bibliographic record describes the format and content of the materials with the ISBN/UPC, title, author, etc. Bibliographic records are created by Main catalogers.
- An item record describes the individual item that your library physically possesses. Item records are "linked" to the proper Bibliographic record.

Part II: Item Templates

Using Templates is a convenient method to link items to a bibliographic record. Templates allow for consistency within collections and streamline the linking process by auto-filling the fields of an item record. They are created using the Polaris Desktop Client and then can be used in LEAP to link items using a log-in with tech permissions. After the creation of at least one item template it can be copied and edited for a new template.

Creating a Template:
1. In the Polaris desktop client, click on [File].
2. Choose [NEW]
3. From options choose [Item Template], then press [OK].
4. After you have made all of the choices, select [SAVE] (floppy disk icon) or click File and Save.

The template can then be used in LEAP or Polaris to link items to the bibliographic record of the catalog. To complete the item record, you will need to fill in the barcode, call number, volume (optional* used in special circumstances), price (optional), and notes (optional) for the individual item.

Explanation of Fields (page 1 of Item Template screen):
Name:
Always use your library's ID (e.g. BER) then title the template (e.g. New Fiction). Some fields will fill in according to the log-in.

Template Owner:
Make sure this is your library.

Public Access Catalog
PAC is the catalog that patrons will see when they search for an item. Check the "Display in PAC" for templates other than magazine (see Part VI: Linking Periodicals) or ILL.

Owner and Assigned branch:
Should be your library. Filled in by log-in, but verify that the correct library and branch are selected.

Collection (e.g. Adult Fiction):
Use the drop-down menu to choose the proper collection for the specific template you are creating. Do not leave this field blank.

Shelf Location:
Use the drop-down menu to select the shelf location according to your library's policy.

Temp Location:
This is optional, but not recommended. It is not searchable and does not appear in the PAC.

Circulation Status:
Choose from "On Order" if the item has not yet been received, "In Process" when the item is in hand, or "In" in rare circumstances.

Circulation Parameters (Material Type, Loan Period, Fine Code, Renewal Limit):
Fill in from the drop-down menu according to your library's policy.

Stat Code:
Optional field that can be used for tracking demand for a genre or subject.

Name of Piece:
Do not use.

Call Number:
Choose Dewey for Scheme. Enter a prefix (i.e. FICTION) for consistency with all items linked with the template. The other fields in this section are specific to each item and should be left blank in the template.

Request box:
Do Not Choose "loanable outside system" this has no bearing in MAIN.

Holdable:
if you want patrons to be able to hold an item, check the Holdable box.

Holds Limited To:
Limits are chosen according to your library's policy and the overarching policy of Main Library Alliance's "At the owning library's discretion, to accommodate local demand for new items, member libraries may make newly released items non-holdable or local holds only for up to two months after the First Availability Date of the item."

Do Not Float:
Leave this field blank. We do not use Floating Collections.

Explanation of Fields (page 2 of Item Template screen):
The note icon opens fields for donor information, notes, and library assigned blocks. Library assigned blocks are useful for material with multiple pieces such as audiobooks, multi-disc DVD sets and "Things".

Part III: Searching the Catalog

Bibliographic Records: How to Choose the Right One

- If a search results in more than one selection, a hit list will be displayed. Use the bibliographic matching points below to determine the proper MARC record that matches your item. Select from the list by double clicking the line/title.
- The MARC record consists of two sections. At the top are the fixed fields, which contain coded information about the item. They include the type of bibliographic record (material type), bibliographic level (monograph or serial), language, dates, date created, and status of a serial.
- The numbered fields/tags below contain information about the item. For matching, the most important are ISBN, 020; Music Number, 028; Author, 100; Title, 245 and Variant Title, 246; Publisher, 264; and Physical description, 300. See Appendix IV for a complete list of fields in the MARC Variable Fields Map.

Books:

Begin your search with the ISBN. Scan the ISBN on the back of the book, if present. If that does not work, try the title and/or author. Confirm that you have the correct record using the MARC fields/tags listed above.

Serials:

- How to recognize a serial from a piece in hand:
  - Keywords in the title: annual, directory, guide, index, yearbook
  - Title page and verso or cover contains prominent dates or editions
  - Multiple copyright dates within a period (generally issued more frequently than every 6 years)
- Searching:
  - The title is the most reliable method of searching for serials. ISSN may also be used, although this access point is NOT reliable, as publishers often use the ISSN for multiple titles. The LC control number and the ISBN should not be used to search for serials.
  - Do not include the date that appears in the title of a serial in a title search. Search for Guide to Turkey, not 2022 Guide to Turkey. Keyword searches will yield better results.
- Confirm you have a serial
  - In the LDR field of the MARC view of the bibliographic record there will be a "cas" or "nas". The 264 field may also offer a clue in subfield c (|c2005-). Travel guides and study guides may also have varied titles or publishers depending on the edition.

Periodicals:

- ISSN: Unlike an ISBN or UPC which can be entered in the search box, you have to click on FIND, then All Keyword Fields and select ISSN from the dropdown menu. The ISSN can be found with your subscription service records (EBSCO or WT Cox, for example) or in the copyright statement of the magazine itself.
- Title: It is recommended that you narrow your search by type of material, periodical then title.

Media (DVDs, blu-rays, audiobooks, music CDs, games):

Scan or search for the ISBN or UPC if present. If neither of those work, try searching by title. Type the title exactly as it appears on the material itself or the container. You can also search for the author, performer, composer, conductor, or narrator.

Things (Some examples are kindles, games, puzzles):

https://staff.mainlib.org/knowledge-base/library-of-things-cataloging-best-practices/

If you do not find a bibliographic record for the item you want to link refer to Part IV: Requesting Cataloging

Part IV: Requesting Cataloging

Requesting Records general guidelines https://staff.mainlib.org/wp-content/uploads/main-cataloging-request-guidelines.pdf https://staff.mainlib.org/cr/

Request form
https://staff.mainlib.org/cr/

Be sure to fill in all fields of the form. Especially title, author, number of pages, publisher, publication date and type of material.

For self-published items include all possible information and mention in the note section that the item is self-published and whether it is fiction or nonfiction, adult or juvenile.

Reporting errors and updates
https://staff.mainlib.org/update-request-form/
- Correction – select correction when there is a spelling error or other similar issue
- Update – select update when the record is skeletal or has the 099 RECORD TO BE UPDATED field.

Part V. Linking

Bib Records

- When you have selected the correct bib record, click on the MARC icon to confirm if the item is a monograph or serial (LDR shows "nam" or "cam" (new or corrected) for a monograph or "cas" or "nas" (corrected or new) for a serial)
- Check the 099 field for ‡aRECORD TO BE UPDATED XXX, if the 099 field is present with RECORD TO BE UPDATED, refer to https://staff.mainlib.org/update-request-form/

Using Item Templates (Leap)

These instructions are based on using established templates (Part II: Item Templates). The fields that are established in the template are indicated (from Template). They can be edited if necessary.

ACTIONS Button

- Click the ACTIONS button and select Create Item from the drop-down menu then select the item template for the item you are linking. Click [CREATE ITEM] button. (*Tip – if you are linking many items for the same category - new adult mysteries, for example - you can select that template in your login Settings Workform User Defaults. You can change the default any time. Select your username, and choose Settings then Workform User Defaults tab.)
- All fields below that say (from Template) can be edited using the dropdown menu.

Details view – Section 1:

- Barcode. Leave blank if you are creating an on-order item record.
- Collection (from Template)
- Shelf Location (from Template)
- Owning Branch and Assigned Branch (from Template. Do not change)
- Price: According to your library's policies you can enter the price of the item here. If it is left blank Polaris will use a default price for billing if the item is lost or damaged. (See Circulation Manual)
- Circulation Status (from Template)
- Bib Control Number – refers to the bib record you are linking to.
- Parent Item – Leave blank. This is not used in Main.
- Display in PAC (from Template)
- Holdable (from Template)
- Non-circulating (from Template)

Details view – Section 2:

- Material Type (from Template)
- Statistical Code (optional) – select from drop down.
- Loan Period (from Template)

- Fine code (from Template)
- Renewal limit (from Template)
- Home branch (from Template)
- Do not float - do not use. This is not used in Main.

Details view – Section 3
- Call Number Scheme (from Template)
- Prefix (from Template)
- Classification – for nonfiction items, enter the Dewey number you are assigning to the item.
- Cutter – based on the main entry in the MARC record 100 field. Usually author's last name. Can also be first word of the title if there is no author.
- Suffix – additional information to be included in the call number as it will appear in the PAC. Examples include S2 (i.e. Season 2 of a TV series); date (for frequently updated titles that are NOT serials)
- Volume – Used in special circumstances. Refer to Appendix VII Volume ID standards
- Copy – leave blank. This is not used in Main
- Name of Piece – leave blank. This is not used in Main

Details view – Section 4 (holds and limits)
- Loanable outside system – do not use. This is not used in Main.
- All other elements are established in the template.

Circulation view
- not relevant when creating an item record.

Blocks and Notes view
- Library Assigned Block – select from drop-down menu. When this field is used, it will pop up when the item is checked out or in.
- Free Text Block – add additional information to clarify the Library Assigned Block alert such as "Check for 5 discs" or "Return to summer reading display".
- System block – not available
- Public Note – anything added to this field will display in the PAC.
- Non-Public Note – useful for adding notes such as "discs cleaned on Jan 5 2020" or "check spine label"
- Physical Condition – useful for adding information such as "pages mended – replacement not available"
- Special Item Check-In – not recommended. This does not appear when checking an item in.

History, Statistics, Record Sets, and Notices views
- Not used when creating an item record.

Source and Donor view

- Section 1: Purchase Order, PO Release Date, Price, and Invoice are not used. First Available Date is set when you check the item in after linking.
- Section 2 Useful for tracking donations. These fields are free text searchable in Leap

When you have finished click [SAVE].

When all selections have been made, Click Create Item on the top right of the screen. It is recommended to check the information before closing the record.

Part VI: Linking Periodicals

There are two categories of periodicals records in the catalog: Holdings (ex: Good Housekeeping) and individual issues of the periodical.

Section I:

Magazine Holdings Standards refers to the record that shows if your library subscribes to a title and how complete your holdings are. MARC records for magazines are in the Polaris database. Each library needs to link summary records of their holdings to create an up-to-date Main union list of serials that is searchable in the public catalog.

Use the desktop client to create templates (leap does not yet have that function). Create a template for linking magazine holdings the same way a template would be created for other items, with the following specifications:

1. Display in PAC should be checked.
2. Collection: Adult Periodicals, Teen/YA Periodicals, or Juvenile Periodicals
3. Material type: Magazine
4. Loan Period: Non-circ (because this item record won't be doing any circulating)
5. Fine Code: No Fine (because this item record won't be doing any circulating)
6. Renewal limit: 0 (because this item record won't be doing any circulating)
7. Prefix: MAGAZINE or PERIODICAL or NEWSPAPER
8. Volume: Holdings should be linked as concisely as possible. Enter the summary of your holdings in the volume field using the following standards. Year(:Month if not Jan)- for current subscriptions. Use ranges if your subscription or the magazine has stopped or been interrupted. For example:
   - 2011-
   - 2011:JUN-
   - 2001-2010:MAR
   - CURRENT 3 YEARS
   - For a Gap: 2001-2010; 2016-
9. Holdable: unchecked
10. Add a Public Note of "Current issue does not go out." if the most current issue won't be available for checkout.

Do not link individual issues of magazines without a special reason. Example: Special issues such as the April Consumer Reports or the Fortune 500 issue may be shelved in a different location. They may also have an assigned call number. (See Section II of this document for linking individual issues for circulation.)

Linking magazine holdings in leap: When linking your holdings (with the template you carefully created) it is recommended to assign a barcode as with any other item added to the catalog.

Section II:

Linking individual issues for circulation. These do not appear in the public catalog but are entered in a way that will display to the patron and to your circulation staff to show specifically what is checked out.

Creating a template for your circulating magazine issues: To create a template, follow the steps discussed previously for creating a template in the desktop client following library policies but uncheck display in PAC.

Linking circulating issues in leap: To link individual circulating records search for your library's circulating magazine title in LEAP by entering MAG XXX YYYY (e.g. MAG MAD 2021) in the search box. Select the record you will link to and continue as you would when linking other material, specifying the title of the magazine in the cutter and the date in the volume. Examples: cutter HOT ROD, date 2023:FEB; cutter PEOPLE, date 2023:FEB 6

Part VII: Linking Tips and Techniques

Multiple Copies:
When copying an item to create a new item record, use the circulation status In-process if the item is in hand. Otherwise change the circulation status to On-Order.

Assigning new barcodes:
Highlight the barcode in the item record you want to change. Scan or type the new barcode. Click [SAVE]

"On-Order":
Note that if you are copying an existing record Leap defaults to added copies as In-process and should be changed to On-Order.

Accompanying Materials:
CD; Maps - In the [Blocks and Notes] page of the item record select [See Note] or [Multiple Items - Check Contents] or other appropriate alert from the drop-down menu to alert staff to check the item and enter a note in the Free Text Block to list materials to be checked.

Moving mislinked items to a different Bib record (Correcting Bib record):
Find the correct bibliographic record and copy its control number. Paste or enter this number into the Bib Control Number field on the item record's [Details] page. Click [SAVE].

Checking linking:
For quality control, to make sure there aren't errors before the item gets out to a patron it's recommended that a person other than the person who originally linked the item check the linking. This can be done by pulling up the item record by scanning the barcode and checking that the record pulled up matches the item in hand. Additionally, the bibliographic record should be checked for accuracy of the item being correctly linked as well as for errors or updates necessary in the bibliographic record.

Record Sets and Bulk Changes:
For this example, we will be creating a record set for withdrawing items, it can be used for other bulk change processes, such as loan periods and shelf changes.
1. To create a record set, first click [New] on the Leap menu bar and use the dropdown to select [Record Set].
2. Select the record type [Item] and click [OK]
3. Name your record set with your library code (e.g. MAD, MNB, PT, WAS) at the beginning. It can be helpful to put your name or initials in the name (e.g. MAD LF) or notes field so you're sure you're working on the right record set when you come back to it. The notes field is optional. Click [SAVE]
4. Scan your items into your record set and [SAVE].
   a. Quality control tip: the number of items you have selected to be withdrawn should equal the

record count.

5. If you want to return to the record set and add more items before marking them withdrawn, use the Find tool to search by name. Click Find, Record Set, and type in the name of the record set or at least the library code that was added at the beginning of the record set name.

6. When you are done scanning, click [SAVE], then select Bulk Change under [ACTIONS].

7. Click [Circulation] and select Withdrawn from the Circulation Status dropdown menu, then click [UPDATE ITEMS].

8. Click continue. You will be returned to the record set and will see either a red banner at the top of the page if there are errors or a green banner that it was completely successful. On the lower left of the screen you will see a text file "ItemBulkChangeRe….txt". Open the file to see any instances that prevented an item from being changed. These will appear in the ItemBulkChangeReport. Follow up on these before you mark them withdrawn.

Part VIII: Physical Processing

Every library has its own criteria for processing books, movies, etc. There are some basic guidelines but keep in mind your library might do things a bit differently. The goal is to make it clear the owning library and the location of the book in that library if you need to find it.

Barcodes:

Every item that circulates gets a unique barcode. The barcode should be placed in the same spot on every item for consistency. (e.g. back cover, inside back cover, back page, first page etc.) Some libraries use duplicate barcodes so items with multiple pieces can have the same number on both items (e.g. book with a CD) that way if they are separated they can be paired up again. Do not use multiple barcodes on multiple pieces as this has caused a lot of confusion in the past.

Spine Label:

Spine labels need to clearly show where an item needs to be shelved based on its collection and possibly its shelf location. For example, is it fiction, non-fiction, mystery, biography, etc.? Then the author's last name. Some libraries use last name, first name. Some just have a last name and some use just the first three letters of the last name. The full last name of the author is recommended as books will be shelved by what is on the spine. Limiting the number of letters from the author's last name has the potential of causing items to only be shelved by those few letters. If the item is non-fiction it will have a Dewey Decimal number first on the call # with the last name underneath. It is recommended for a serial item that the date of the volume field be included on the spine label. It is critical that the spine label information match with information in Polaris for the item to be able to be found.

Stickers:

Many libraries use stickers to specify the genre of the item such as fantasy, mystery, science fiction, historical fiction or type of material like biography, travel, etc. Many libraries will use some form of sticker to show that a book/movie is new. This is a temporary sticker that might say New, 14-Day, or have just a month on it. Some stickers allow staff write the date on them.

Jackets:

Hardcover books with dust jackets need mylar book covers to protect them. The vendor you purchase from may also offer processing and will send it already covered or the library staff can do it themselves. It is recommended that softcover or paperback books are also recommended to have covers to help with damage control. Again, it is up to the individual library to determine if all books get covers or not.

Property Stamp:

All items that are circulated should have a stamp or sticker clearly showing the owning library. Patrons and staff especially should not have to hunt to find out who owns an item. You can stamp the top edge of the text block with the library name. Some libraries pick a page inside the book to stamp. Most books are stamped

inside the front and back cover or the title page and back cover. Most libraries stamp the book with the date it first became available.

Security Strip/RFID:
Usually inside front cover

Book Plates:
Front of book or flyleaf

Hub Labels:
Round labels used on discs to identify the owning library. Occasionally the disc and the case will get separated and this helps to identify the owning library if the disc does not have a barcode.

Other suggestions for media materials:
Movies, music CDs and audio books on CD should all have a property sticker, # of discs sticker and a slip of paper inserted in the case where patrons can mark if they have any issues with a disc.

Part IX: Do's and Don'ts

DON'T

Use On-the-Fly: on-the-fly records tend to be forgotten and create an incomplete record in the system.

"Delete" an item record unless it's a mistake. Always use withdrawn. If you delete an item record you lose all statistical data (lifetime circulation, first available date, last borrower, etc.) To withdraw items, change the circulation status to Withdrawn so that the reports will show activity correctly

DO

Be sure to click on the red Close button to close out of all the records open in Leap, not closing them locks the records from other library staff from being able to edit them.

Do log out of Leap before shutting down the computer.

Do use the proper volume field when needed. Be careful to follow the proper syntax.

Do link DVDs to the DVD bibliographic record and Blu-rays to the Blu-ray record. Do not link a DVD to a Blu-ray record or a Blu-ray to a DVD record.

Appendix I: Four Categories of Technical Services

(https://staff.mainlib.org/wp-content/uploads/MAIN-Four-Catagories-of-Technical-Services.pdf)

Appendix II: Collections, Shelf Locations, Stat Codes, Material Type

https://staff.mainlib.org/technical-services-committee/

Select Main Linking Lists for a downloadable spreadsheet of the most up to date lists and abbreviations.

Appendix III: JerseyCAT & ILL

See MAIN Circulation Manual Appendix 13: Interlibrary Loan Structure & Procedures (page 42)

Appendix IV: MARC Records

System of cataloging designed and maintained by the Library of Congress.
The catalogers at MAIN import a unique MARC record for a monograph or a unique serial record for each serial.

Fields:

Each line of the MARC record is referred to as a field. A field is designated by a three-digit number.

- LDR — Identifies format
- 0XX
  - 007 — Works in tandem with the leader to further define format and date
  - 008 — Works in tandem with the leader to further define format and date
  - 020 — ISBN
  - 022 — ISSN
  - 024 — UPC
  - 082 — Suggested Dewey number
  - 099 — RECORD TO BE UPDATED notice
- 1XX
  - 100 — Author or Creator
  - 110 — Corporation Responsible for Creation
- 2XX
  - 245 — Title
  - 246 — Variant form of title
  - 250 — Edition
  - 264 — Publication Information (260 in older records)
- 3xx
  - 300 — Physical description (# pages, special content, size)
- 4XX
  - 490 — Series Statement
- 5XX
  - 500 — General Note
  - 504 — Bibliography or Index
  - 505 — Table of Contents
  - 520 — Summary
  - 521 — Target Audience note (e.g. MPAA rating)
  - 538 — system requirements/details. Includes physical or technical information on video games, DVDs, Blu-rays, and electronic resources
  - 546 — Language Note
- 6XX

- 600 — Personal name subject heading
- 610 — Corporate subject heading
- 611 — Conference subject heading
- 630 — Uniform title subject heading
- 650 — Topical subject heading
- 651 — Geographic subject heading
- 655 — form/genre term.

- 7XX
    - 700 —Added Entries (e.g. additional author, illustrator, multiple short stories, plays)
    - 710 — Corporate added entries
    - 711 — Conference added entries
    - 730 — Uniform title added entry
    - 740 — Contents added entry
- 8XX
    - 800 — Series Added Entry – personal name/title series
    - 830 — Series Added Entry – series title
    - 850 — Holdings information
    - 852 — Holdings and item information
    - 856 — Electronic Location and Access

For a deeper dive into the MARC record visit https://www.loc.gov/marc/bibliographic/ecbdlist.html

Appendix V: Glossary of Technical Services terms

Template description items

Owning Branch:
Based on login.

Assigned Branch:
Based on login, unless library has multiple locations.

[Material Type](#):
Choose from drop-down menu. Examples are: Book, Paperback, DVD.

Classification:
Type in the Dewey Decimal number for the item. (Or according to other method your library may use) This number appears on the spine label and in the catalog used by patrons.

Prefix:
Enter according to your library convention. This entry will appear on the item record and label. Examples are: FICTION, MYSTERY, J, YA, etc.

Cutter:
Typically, this is the author's name. Example: Patterson. Can also be the name of a subject especially when there are multiple authors. Example: Spiderman. Example: Italy (for travel books)

Suffix:
Use to modify entry. Example would be the season of a TV series.

Volume:
Refer to [Appendix VII Volume ID standards](#). If the series is in the bibliographic record, do not put it in the volume field. If absolutely necessary, put the series number in the Suffix. Data in the volume field affect holds. Some specific reasons to use the volume field are:
- To specify the number of discs in a DVD collection. Use the following format: DISC 1-x.
- To specify the year of publication of a series. Example: 914.5 (classification) Italy (cutter) 2022 (volume)
- Avoid using the volume field in other occasions. A filled in volume field creates a separate record when a patron searches the catalog. This is problematic because many holds are placed on the one item with a volume field when there are other identical copies available without the volume field entered.

Stat Codes:
A list of genres and subjects to help track demand. Optional. Choose from the drop-down menu

Renewal Limit:
Defines how many times an item can be renewed.

Fine Code:
Choose from drop-down menu according to your library's policy. Example: No fine, $.10/day $5 Max

Collection:
Choose from the drop-down menu. Example: Adult Fiction, Adult Non Fiction, Adult Media, Juvenile Fiction

Shelf Location:
This makes finding an item easier. Your choice from the drop-down menu will appear on the pick list. Use to specify a special location within your library. Example: Large Print, Travel, New.

Circulation Status:
Example: On Order, In Process, In, Withdrawn

Blocks and Notes:
A block will pop up during checkout and check in. Notes are useful to alert library staff of an issue with the item. Example: Multiple Items- check contents. Disc and Booklet. Book and Map.

Loan Period:
Choose from drop-down menu according to your library's policy. Example: 14 days, 21 days

Appendix VI: Recommended Maintenance Tasks

When report is received:
Working with Long Lost Items - Review the Long Lost item report to withdraw items that have been Lost for an extended period of time.

Monthly:
- Create a List of Items Marked MISSING – necessary to periodically check the shelves for MISSING items to correct the status, then, proceed according to your library's practice, for example replace the title and/or withdraw the record.
- Create a List of Items Marked In-Repair, Unavailable – verify item location to update these circulation statuses if the item is back on the shelf.
- Change Holdable Status of New Items to comply with Main policy, you must change items to be holdable by all patrons once owned for 2 months.
- Find and fix barcode errors.

Quarterly:
Find and fix erroneous or embarrassing data in the public notes field.

Annually:
Check your periodicals listings. At least once a year check your periodicals listings in the catalog. Withdraw titles that you no longer subscribe to and add new titles.

Appendix VII: Volume ID Standards

Please follow these standards when linking a serial or set. Different ways of entering volumes causes problems with demand management. For DVD sets, see Appendix VIII: Linking DVD Sets

Use the entire year, not the last two digits: 1995, not 95.

On rare occasions a publisher uses the term "volume" for "edition". Do not confuse these with multi volumes issued in one year. For example, "1998:2" under "Scott Standard Postage Stamp Catalogue" indicates volume 2 of the 6 volumes issued for 1998. But the title Clements' Encyclopedia of World Governments is issued biannually and called v.12 (1996-97), v.13 (1998-99), etc. Coding it 1998-99:13 could be construed as having at least 13 volumes issued for the 1998-99 edition. This should be coded V.13 1998-99, or just 1998-99.

Standard Abbreviations
- January: JAN
- February: FEB
- March: MAR
- April: APR
- May: MAY
- June: JUN
- July: JUL
- August: AUG
- September: SEP
- October: OCT
- November: NOV
- December: DEC
- Edition: ED
- Cumulation: CUM
- Supplement: SUPP

Examples	Incorrect	Correct
1 year (copyright date)	95	1995
2 years or a span	1995/99	1995-99
Same century	2000-2001	2000-01
Different centuries	1999/2003	1999-2003
Volume alone (or part or number	VOL. 1	V.1
or book)	PART 3	V.3
	DISC 2	V.2
	# 5	V.5
	1, A-K	V.1:A-K
Edition and year	31ST ED., 1995	1995
Multi-volume or number in one year	1995, v.1	1995:1
or edition	1995, v.2	1995:2
Use ed. Only for Reference.	3d ed, 1995, v.2	1995:2
Quarterly, monthly, bimonthly	Fall 1995	1995:FALL
	Spring 1995	1995:SPRING
	Summer 1995	1995:SUMMER
	Winter 1995	1995:WINTER
	January 1998	1998:JAN
	Jan/Feb 1998	1998:JAN-FEB
	Jan-Feb-Mar 1998	1998:JAN-MAR
Supplements	Supplement #1	SUPP 1
Supplement for a specific year	Supplement, 1995	1995:SUPP
Supplement for more than one year	1997/98 Supplement	1997-98:SUPP

Examples	Incorrect	Correct
Irregular		
United States Code Annotated (U.S.C.A.)	Title 8 to Title 10, sections 101-3000	TITLE 8-10:101-3000
New Jersey Statutes Annotated (N.J.S.A.)	Title 40A, Section 16 to Title 42:end	TITLE 40A:16-TITLE 42:END
Cities of the United States 1998:4:NORTHEAST	3d ed, 1998, vol 4: the Northeast	3ED

Summary Records for Sets

Some libraries may want to link large sets with summary item records rather than linking each individual volume. If you choose to do so, follow the guidelines above. Link the full range of volumes held. If you add another volume, edit the existing record to reflect current holdings.

If there are missing volumes, use a public note to indicate gaps. For example:

V. 1-33, not V. 1-

2006:1-33, not 2006

Appendix VIII: Linking DVD Sets

Feature films should have no information in the volume field of the call number. For example, a movie *Oppenheimer* containing 2 discs (one for the film, one for special features) might have a call number of DVD OPPENHEIMER.

For television series, including mini-series, and streaming series such as series from Netflix

- If a title has one disc in one container, there is nothing in the volume field.
- If there are multiple discs in one container, specify the discs in the container in the volume field. This applies when there is more than one disc for one title, in one container. Examples of what to put in the volume field:
    - DISC 1-2
    - DISC 1-12

If you have a title with multiple discs and you separate the discs into multiple containers, OR if the manufacturer packages a single title in multiple containers, use:

- DISC 1
- DISC 2
- DISC 3
- DISC 4
- DISC 5
- DISC 1-2
- DISC 3-4

If the disc has a title, not a number, assign the disc number in the volume field in accordance with the bib record details found in the 505 Contents tag. Recommended: add title to public note and/or suffix.

Use DISC (singular) not DISCS or DISKS

Use hyphen, not &, etc.

Be attentive to consistent spacing.

Do not put other information in the volume field, such as accession number, title of disc, RENTAL, etc.