SHARE Bibliographic and Cataloging Standards and Best Practices

This document incorporates the cataloging standards that have been approved by vote of the SHARE membership as well as SHARE cataloging best practices, which are proposed SHARE cataloging policies that are pending final vote by the SHARE membership. These are considered best practices to be followed until the approval process is complete. For ease of identification, best practices are distinguished from approved standards by a different color text.

As of: November 17, 2015

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1. Definitions

Barcoding – attaching an item/holding record to a bibliographic record found in the SHARE database.

Copy Cataloging - includes searching for bibliographic records in OCLC when a match is not found in the SHARE database, editing the OCLC bibliographic record, and importing the edited record into the SHARE database.

Original cataloging - creation of a bibliographic record when a matching record does not exist in OCLC.

SHARE full member libraries have the option to choose to be either a cataloging library or a barcoding library.
Cataloging library – Staff have the knowledge to perform copy cataloging. If qualified, staff may also do original cataloging, upgrade less than full-level OCLC master records, and make other permanent changes to OCLC master records via the OCLC Expert Community functionality. Catalogers may edit bibliographic records in the local database in accordance with SHARE bibliographic and cataloging standards and best practices.

Catalogers must agree to comply with SHARE cataloging policies, which include attending 15 hours of continuing education related to cataloging each fiscal year (July 1 through June 30). The 15-hour requirement applies to each cataloger. For information on how the cataloging continuing education requirement may be fulfilled, see the link on the SHARE website.

Barcoding library – Staff have the knowledge to search for bibliographic records in the SHARE database and add item/holding record to the matched bibliographic record. Library staff does not perform copy or original cataloging.

Full-level OCLC record – a record with an encoding level defined by OCLC as full according to Bibliographic Formats and Standards http://www.oclc.org/bibformats/en/fixedfield/elvl.html

2.Baseline policy statement for cataloging practices in SHARE

Cataloging in SHARE will follow LC cataloging practice as much as possible, with local exceptions determined on an individual basis. Bibliographic records brought into the SHARE database must be **full-level OCLC records**, with the exception of acquisition records and records created locally according to SHARE bibliographic and cataloging standards (i.e. records for equipment and library-developed kits). SHARE cataloging policies will be subject to continual review and revision by the SHARE Bibliographic and Cataloging Standards Committee and the full membership.

General policies—apply to both cataloging and barcoding libraries

3.OCLC membership policy for SHARE member libraries

SHARE Cataloging libraries

Cataloging libraries must also be OCLC members

--SHARE cataloging policy is to import only full-level OCLC records to the database

SHARE Barcoding libraries

Barcoding libraries are not required to be OCLC members. However, OCLC membership is encouraged so that, in addition to other benefits of membership, barcoding libraries may be included in all processes used to set holdings in OCLC.

4.On-order records

On-order records are intended for patron/staff information only and to allow holds to be placed before items are received. They are not to be used for circulation of material. The use of on-order bibliographic and item records is optional.

For libraries using the acquisitions module, a brief record will be created when the purchase order is created, if a matching record is not already available in the database after an initial search.

Cataloging libraries not using the acquisitions module that want to enter on-order records will create a short bibliographic record using one of the on-order bibliographic record templates created by SHARE Bibliographic Services staff.

- --If a record is not already available in the database after an initial search, do not import OCLC records to use as on-order records—use only a brief bibliographic record. This will allow on-order records to be more easily identified
- --Select the bibliographic on-order record template that corresponds to the appropriate format of material. This will allow the correct format icon to be generated in the PAC

--Add information as needed to make identification as clear as possible to patrons and other staff (i.e. abridged or unabridged, widescreen or full screen, DVD or Blu-ray, etc.)

Barcoding libraries not using the acquisitions module may request on-order bibliographic records be created by Bibliographic Services staff
    --Before requesting a record be created, search the database for an existing on-order record
    --If an existing record is not found, complete the <u>form</u> on the SHARE website to request an on-order record be created

Any library may attach an on-order item record to a brief record if desired
    --Use an on-order item record template to attach an item record with a circulation status of On-order
    --Edit as needed to reflect the material type of the item
    --On-order item records must be marked as Holdable with no limits even if the library intends to make the item holdable only by their patrons when it is received
        --This allows holds to be placed at the bib level by any patron
    --Do not attach an item record with a circulation status <u>other</u> than On-order to any brief on-order bibliographic record
    --Do not enter a barcode in an on-order item record
        --This prevents item-specific holds from being placed

When the item is received:
    --**Cataloging libraries**: The first cataloging library or SHARE cataloging center that receives the item will import an OCLC record and also search the database for a matching on-order record
        --Cataloging libraries may merge the on-order record to the OCLC record, or may notify SHARE Bibliographic Services staff to merge the records (notification may be made by any library)
            --Do not merge an on-order record unless you're sure it's a match. When in doubt, don't merge!
        --This will move all on-order item records and holds to the new record

    --**Barcoding libraries**: send your item to IHLS for cataloging as usual, or hold the item until an OCLC record is available in the database and the on-order record has been merged
    --Once the on-order record has been merged to an OCLC record, libraries may edit the on-order item record as needed when the item is received
        --At that time, a barcode may be added and hold limits set as desired

5.On-the-Fly records for in-house material

No in-house material should be circulated if it is not cataloged. The use of the on-the-fly functionality in Polaris should be reserved for the rare instance of uncataloged material that is mistakenly on the shelf. For example, an item that is identified as missing during an inventory and the item record is deleted, but is later found and returned to the shelf without being recataloged.

SHARE staff have created an on-the-fly item record template for each library. Both the short on-the-fly bibliographic record and attached item record will be marked not to display in the PAC, and the item record will be marked as loanable only to patrons of the branch. The template will include a block that tells the circ staff at check-in to send the item to cataloging. SHARE staff will delete on the fly item records after checkin.

6.Use of the serials module for magazines and newspapers

All libraries that barcode magazines are required to enter a serial holdings record through the Polaris serials module to show the retention period of all magazines. Creation of serial holdings records is optional for libraries that do not barcode magazines. If your library uses a bibliographic record for newspapers, a serials holdings record must be created. Libraries are not required to barcode or circulate these materials. Use of the serials module is not required for serial material such as test books, travel guides, etc.

7.Cataloging of uncorrected proofs and advance reading copies

Based on a recommendation from the Illinois State Library and information from publishers' websites, uncorrected proofs and advance reading copies are not intended to be added to the collection. If the library feels the material is important enough to keep (i.e., is of historical significance), it should be marked as non-circulating.

8.Entering enumeration of periodicals, annuals, multipart sets, etc.

It is very important that information in the Volume field of the item record be entered consistently in order for the holds process to work efficiently and equitably.

Item records attached to a bibliographic record for a serial or multi-part item contain information in the Volume field to identify the part, volume, issue number, etc. In these instances, when a patron places a hold, Polaris will ask the patron to select a particular part, volume, issue, etc. The system is designed to group together all items for that particular part or volume from any library and fill a hold from any available item within that group. However, Polaris will group these items together only if data in the Volume field in the item record has been entered consistently.

This policy applies only to item records created through the cataloging module for circulating items where an item record for an individual part is attached to a bibliographic record for a set (i.e., a multivolume set of poetry, or an encyclopedia that is circulated)

The following standard abbreviations/entries should be used:

For Volume, enter:
v. [Arabic numeral]

Examples:
On piece: Volume one
In item record, enter: v. 1

On piece: Volume IV
In item record, enter: v. 4

On piece: Vol. 2
In item record, enter: v. 2

For Volume and part, enter
v. [Arabic numeral], pt. [Arabic numeral, or letter]

Examples:
On piece: Volume one Part 2
In item record, enter: v. 1, pt. 2

On piece: Volume V, Part A
In item record, enter: v. 5, pt. A

For Book, enter:
bk. [Arabic numeral]

Examples:
On piece: Book One
In item record, enter: bk. 1

On piece: Book VI
In item records, enter: bk. 6

On piece: Book 2
In item record, enter: bk. 2

For Edition, enter:
[Ordinal number] ed.

Example:
On piece: First edition
In item record, enter: 1st ed.

For edition and year, enter:
YYYY, [ordinal number] ed.

Example:
On piece: 19th edition, 2014
In item record, enter: 2014, 19th ed.

For year alone, enter:
YYYY (Enter as Arabic numerals—do not enter Roman numerals)

Example:
On piece: MMXII
In item record, enter: 2012
Important! Case doesn't matter (V. and v. will line up together); however, internal spacing does (v.1 and v. 1 will <u>not</u> line up together).

Note: Do <u>not</u> enter series numbering in the Volume field of the item record (i.e., book 212 of the Goosebumps series). Use the Suffix field of the item record for this information if desired. It will display at the end of the call number.

Exceptions:
This policy does not apply to item records created through the serials module for periodicals. The serials module is set up to automatically enter consistent issue information.

Do <u>not</u> use in records for multipart DVDs or Blu-rays (i.e., a record for the entire season of a televisions series). Discs that are circulated separately must be attached to a record for the individual disc, and the Volume field is left blank.

Policies on record matching—apply to both cataloging and barcoding libraries

9.Paperbacks and hardbacks on the same record

Paperbacks and hardbacks may be attached to the same bibliographic record only if they meet the OCLC Bibliographic Formats and Standards match criteria. (http://www.oclc.org/bibformats/en/input.html)

An ISBN on a matching item should be added to the bibliographic record if not already present.

10. Attaching to set vs individual records for multipart audiovisual material

For multipart audiovisual material (i.e., DVDs and audiobooks), attach your holding to the appropriate set or individual record based on how your library intends to circulate the item. An example is the entire season of a television series that consists of several DVDs in one container. If you will be circulating the container as one piece, attach to the record for the set. If you will be circulating the DVDs separately, attach to the records for the individual DVDs.

11.Attaching to serial vs monograph records for serials other than periodicals

This policy applies to serials that are published annually or less frequently, such as test books, travel guides, etc.:

--Use a serial bibliographic record for resources that will not circulate in Polaris (i.e., reference material)
--Use a monograph bibliographic record for resources that will circulate in Polaris
--If there is a gap of 5 years or more between editions of a serial, use a monograph bibliographic record, even
  if the resource will not circulate in Polaris
--If the circulation status of a resource changes (i.e., it goes from non-circulating to circulating, or vice versa)
  the item record must be transferred to the appropriate serial or monograph bibliographic record

--Retrospective cataloging of existing items is recommended, but not required

-- Serials covered in this policy will be attached to the appropriate serial or monograph bibliographic record through the cataloging module. Periodicals (i.e. magazines or journals) will be attached to a serial record through the Polaris serials module.

12. Attaching to records for multipart print material other than serials

This policy applies to print works that are issued in multiple volumes. This policy does not apply to serials (see *Attaching to serial vs monograph records for serials other than periodicals*) or audiovisual material (See *Attaching to set vs individual records for multipart audiovisual material*)

--Use a monographic set record for complete works in multiple volumes that are published in the same year with the same title. Examples are encyclopedias or multivolume biographies where all volumes have the same title
--Use an individual record for separate works published in a series. Example is the Great books of the Western world series—each volume has a separate title
--Use an individual record for multi-volume works on the same subject by the same author, published in different years with different titles or subtitles. Example is the biography of Winston Churchill by William Manchester. Volume 1 was published in 1983, Volume 2 in 1988, and Volume 3 in 2012. All have different volume titles
> --This applies to circulating items only. Items that do not circulate may be attached to a monographic set record if desired
--Retrospective cataloging of existing items is recommended, but not required

13. Book club editions and regular editions on the same record
Book club editions may be attached to the record for the regular edition only if they meet the OCLC Bibliographic Formats and Standards match criteria. (http://www.oclc.org/bibformats/en/input.html)

14. Records for the same item, with and without accompanying material

An item with substantive accompanying material should be cataloged on a separate record from the same item that does not include the accompanying material. Records will not be merged in this instance. This is in accordance with OCLC's policy on accompanying material.

15. Rental edition and regular edition videorecordings on the same record

Rental edition videorecordings may be attached to the record for the regular edition only if they meet the OCLC Bibliographic Formats and Standards match criteria. (http://www.oclc.org/bibformats/en/input.html). This includes, but is not limited to: format (fullscreen vs. widescreen), languages of sound tracks and subtitles, absence or presence of special features, etc.

16. Local bibliographic records for equipment, library-assembled kits, etc.

Local bibliographic records may be created in the following circumstances:

Acquisition records
-Created by libraries using the Acquisition module

On-order records
-Created according to guidance in the SHARE Bibliographic and Cataloging Standards and Best Practices

Equipment records
-Including, but not limited to, items such as cameras, projectors, pre-loaded e-readers, etc.
-Cataloging libraries may create local records, or may request records be created by SHARE Bibliographic
 Services staff by submitting a help desk ticket
      -Use the generic Equipment bibliographic record template and complete as appropriate
      -If an appropriate record is available in OCLC, import the OCLC record
-Barcoding libraries may request records be created by SHARE Bibliographic Services staff by submitting a help
 desk ticket

Records for library-assembled resources
-Examples: a library packages a children's book and a puppet together and circulates them as a unit, or a
 library assembles a Thanksgiving-themed kit composed of a book, DVD, doll, and puzzle related to the holiday
-Resources purchased from a vendor already assembled must be cataloged in OCLC
-Cataloging libraries may create local records, or may request records be created by SHARE Bibliographic
 Services staff by submitting a help desk ticket. Cataloging fees will apply
-Barcoding libraries may request records be created by SHARE Bibliographic Services staff by submitting a help
 desk ticket. Cataloging fees will apply.

Options for record creation:
      -If the resource will not be loaned outside of SHARE, an original local bibliographic record may be
       created in Polaris
      -If the resource will be loaned outside of SHARE, an original record must be created in OCLC and
       brought in to the Polaris database

Guidelines
      -Be sure to use the appropriate Type of Material (TOM) in the local record
      -For bibliographic record purposes, a kit is defined in AACR2 Appendix D as "an item containing two or
       more categories of material no one of which is identifiable as the predominant constituent of the
       item" (italics added)
      -If the resource has a predominant component, use that as the basis of the bibliographic record and
       the TOM, with other items listed as accompanying material
            -Example: a book and a puppet packaged together may be cataloged as a book with an
             accompanying puppet, or as a puppet with an accompanying book, depending on which
             item the library feels is the predominant component
      -Libraries may use a Material Type of Kit in an item record, or use Kit in a call number if desired, even if
       the resource is not cataloged as a kit in the bibliographic record

Cataloging procedures—apply to cataloging libraries only

General procedures—apply to all formats

17. Policy for editing bibliographic records of material owned by the Abraham Lincoln Presidential Library and Museum (ALPLM)

Bibliographic records for material held by the ALPLM may be edited only by ALPLM staff and SHARE Bibliographic Services staff.

This is due to the unique nature of the ALPLM collection and the extensive local edits that are made to some records.

Other libraries may attach item records and serial holdings records, but will not be able to edit the bibliographic record. SHARE Bibliographic Services staff will edit records only for MARC coding changes and authority control. For all other edits, libraries may contact ALPLM cataloging staff directly.

18. Guidelines for retaining ISBNs in a record

Delete ISBNs for formats other than what is being described by the bibliographic record. For example, delete the ISBN for the ebook from a record for the regular print version. Also, delete ISBNs for other volumes in records for an individual volume of a set.

19. Wording of General Material Designation (gmd)

The standard general material designation (gmd) terms as prescribed in AACR2R, para. 1.1C1 should be used in records for large print material and for non-print formats.

20. RDA and Hybrid Records

Bring in an RDA or hybrid record if it matches the item in hand. A hybrid record is defined as an AACR record to which some RDA elements have been added, but it is not considered an RDA record.

Do not make changes to RDA or hybrid records, EXCEPT:
- --Add a gmd (245 subfield h) to records for non-print material and large print books. Use the terms in AACR, para. 1.1C1, list 2
- --Edit as needed to fix incorrect cataloging (i.e., fixed field coding is wrong) or to add subject headings, notes, summaries, etc.
- --If a title has been entered in all capital letters, edit to AACR formatting. Otherwise, accept title formatting as it appears. This applies to a title in any MARC field in the record

Verify names, series, and subjects as usual.

21. Editing AACR2 records to match RDA records with a fictitious character as main entry

In cases where the main entry in an RDA record is different than the main entry in an AACR record because of the provision in RDA that allows a fictitious character to be main entry, the following actions should be taken:

-Edit AACR2 records to make the fictitious character main entry in the 100 field

-Add a 700 added entry to the record with the name of the author that was originally in the 100 field

It is not necessary to recatalog the entire record as an RDA record.

The option to change spine labels and call numbers based on these edits is an individual library decision.

Background: RDA cataloging rules allow a fictitious character to be main entry, which was prohibited under AACR2. This change may cause records to have different main entries, which can lead to inconsistent search results.

Example: AACR2 records for the Murder, she wrote books list Donald Bain as the main entry, although the statement of responsibility reads Jessica Fletcher and Donald Bain. As a fictitious character, Jessica Fletcher would not be considered an author under AACR2, so could not be used as main entry.

RDA allows fictitious characters to be considered creators (i.e., authors), so RDA records for the Murder, she wrote books list Jessica Fletcher as main entry.

22.Use and retention of subject headings
Note: these are local edits only. Do not make these changes in OCLC master records.

Use/retain these types of subject headings in records in Polaris:
- LCSH, LCGFT, GSAFD
- Genre and form terms according to the guidelines in *Use of genre terms*
- LC children's headings if different than the adult heading
- Approved local subject headings in MARC tag 690 (see section below for guidelines on local subject headings)
- Approved local genre/form headings in MARC tag 655 (coded local in subfield 2)
- Medical subject headings (MeSH—MARC tag 6XX, second indicator 2)
- Foreign language subject headings if they are the same as the language of the item being cataloged. For videorecordings, this includes the main language track and any dubbed language tracks. This does not include language(s) of subtitles. Do not add foreign language subject headings if they aren't already in the record

Delete these types of subject headings from records in Polaris:
- Sears headings
- Headings from a thesaurus other than LCGFT (i.e., migfg, bisach, fast, etc.) except foreign language subject headings and terms from the GSAFD that meet the guidelines for retention
- Foreign language subject headings if they are different than the language of the item being cataloged. For videorecordings, delete foreign language subject headings for the language(s) of subtitles

Headings in records for juvenile material:
- Use LC adult subject headings with juvenile subdivisions
- Retain LC children's headings only if they are different from the adult heading
- Do not use the subdivision *Juvenile sound recordings* in subject headings in records for juvenile audiobooks. Use the subdivision *Juvenile fiction* or *Juvenile literature* as appropriate

23. Local subject headings

Local decisions may be made for the use of subject headings in situations where the resources cannot be easily found using available searches by Collection, Shelf Location, Material Type, etc., and no other appropriate heading exists. These headings must be approved before being used in Polaris

- The SHARE Executive Council has authorized SHARE Bibliographic Services staff to approve local subject headings with review by the SHARE Bibliographic and Cataloging Standards Committee. A vote by the SHARE membership is not required
- Libraries may submit a request for a local subject heading through the SHARE help desk

MARC Coding

Local headings may be included in bibliographic records in two ways:

- An existing LC subject heading being used in a non-standard way according to LC guidelines. Coded in MARC tag 65X with subfield 2 local
- A locally devised heading created when no LC, MESH, gsafd, or lcgft heading exists. Coded in MARC tag 690

Guidelines for local subject headings

- A local subject heading will not be approved if an appropriate LC, MESH, gsafd, or lcgft heading is available
- A local subject heading will not be approved that is intended solely to identify an individual library's collection of a particular format (i.e., a library's collection of DVDs)
- A local subject heading may be approved for a special collection if an existing Collection code or Shelf Location does not suffice

Procedures for the use of local subject headings

- Add approved local subject headings as appropriate to records when they are brought in to Polaris. Do not add them to master records in OCLC
- Delete MARC tag 690 from other libraries out of OCLC records before exporting the record to Polaris
- A list of approved subject headings will be posted on the SHARE website and will be updated as headings are approved

Currently approved local subject headings—see the document posted on the SHARE website

24. Use of genre terms

Genre refers to a category of work with similar characteristics (i.e., mystery, horror, science fiction, romance, etc.). Genre terms are coded in MARC tag 655 and display in the PAC with the label *Genre*.

Guidelines

- Follow LC practice of using genre and form terms from the thesaurus named *Library of Congress Genre/Form Terms for Library and Archival Materials* (LCGFT)
- If an LCGFT term is not available:
  - Use a genre/form term from the thesaurus named *Guidelines on subject access to individual works of fiction, drama, etc*. (GSAFD) with the following exceptions:
    - Do not use the headings *Regency fiction* or *Romantic suspense fiction*
  - The GSAFD term *Christian fiction* will be used as appropriate in Polaris records
- If neither an LCGFT term nor a GSAFD term is available:
  - Use an LCSH term coded as a genre/form term (see instructions below for guidelines on coding)

- Add any appropriate subject headings as indicated in SHARE local policies. See individual policies and the approved local subject headings list
    - Add approved local subject headings to records when they are brought in to Polaris. Do not add them to master records in OCLC
- For guidelines on the use of Library of Congress Subject Headings as genre terms, see the following document on the Library of Congress website: Frequently Asked Questions about Library of Congress Genre/Form Terms for Library and Archival Materials (LCGFT). See Question 35 in that document in the section titled *Application of terms*
    - If a Library of Congress topical heading can be used as a genre heading according to the above guidelines, approval as a local subject heading is not required
        - Coding: 655 _0 **$a**[LC term].
    - If a Library of Congress topical heading cannot be considered an LCSH genre heading according to the above guidelines, but your library would like to use it that way, please submit a request for approval of a local subject heading. If it's determined the heading may be used, it will be added to the list of approved local subject headings
        - Coding: 655 _7 **$a**[LC Term].**$2**local

MARC Coding:
- For terms from the LCGFT: 655 _7 **$a**[LCGFT term].**$2**lcgft
- For terms from the GSAFD: 655 _7 **$a**[GSAFD term].**$2**gsafd
- For LC headings used as genre terms: 655 _0 **$a**[LC term].
  Note: code LC headings being used as genre terms in MARC tag 655, not 650
- For LC headings approved for use as a local subject heading: 655 _7 **$a**[LC Term].**$2**local
- For non-LC headings approved for use as a local subject heading: 690 _ _ **$a**[Term].

25. Local series authority records Return to Table of Contents

SHARE Bibliographic Services staff will create local series authority records in the Polaris database when requested in cases where a series statement appears on a resource, but no national-level series authority record has been established. A local series authority record will be established if documentation can be provided that at least three items have been published with the same series title, or if the series title is on the resource.

A local series authority record will not be created in cases where the only source of series information is the CIP. Series information must also appear elsewhere on the resource.

Local series authority records will include all formats. Separate local series authority records will not be created for different formats of the same series, i.e. print, audiobook, large print, etc.

To request the creation of a local series authority record, enter a help desk ticket and attach scans of the title page, verso, disc label, etc. and any information on the resource pertaining to the series, i.e., series title page, cover, container, etc. as well as any additional information from other sources such as author's website, etc. that you feel may be helpful.

26. Contents notes: (MARC tag 505)

Contents notes contain the titles of separate works or parts of an item. They may also include statements of responsibility and other information about the works or parts. Contents notes increase access to resources through keyword and/or indexed searches.

Type of contents notes
- Basic (unenhanced): All information is coded in one subfield a. Searchable by keyword only
  - MARC Coding: 505 2nd indicator blank
- Enhanced: Titles entered in individual subfield t. Searchable by keyword and title index.
  - MARC Coding: 505 2nd indicator 0

General guidelines
- In most cases, retain existing contents notes in OCLC records. Enhance as appropriate according to the guidelines below
  - Exception: delete a contents note in a record for a fiction work if the contents note reflects only chapter titles rather than titles of essays, plays, poems, or short stories, etc.
- If an OCLC record has an unenhanced contents note and the record contains added entries for each title in MARC tag 740, it may be left as is.
- If an OCLC record has an unenhanced contents note but does not contain added 740s for each title, the contents note should be enhanced if appropriate according to the guidelines below.
- Add contents notes to master record before exporting the record to Polaris
- Omit generic terms such as Introduction, Conclusion, Prologue, Finale, Overture, and similar terms used as titles. If these terms have been omitted, the contents note should be coded as a partial contents note (first indicator 2).
- Retain initial articles in titles in subfield t. This includes initial article in English (a, an, the) as well as initial articles in other languages

RESOURCES WITH 25 OR FEWER WORKS
Applies to:
- Essays
- Plays
- Poems
- Short stories

Use an enhanced contents note to record the titles and other appropriate information. See section below for guidance on sound recordings and music.

RESOURCES WITH MORE THAN 25 WORKS
Applies to:

- Essays
- Plays
- Poems
- Short stories

For resources with more than 25 works an enhanced contents note may be added, but is not required.

If a complete enhanced contents note is not provided, a partial enhanced contents note can be added for the more significant works (i.e. longer and/or more widely known).   A MARC tag 520 (summary note) should be added to give a more complete picture of the extent of the work; for example: "A collection of 68 short stories chosen from those appearing in 'The New Yorker' from February, 1925 to September, 1940".

TABLE OF CONTENTS FOR NONFICTION
If a nonfiction work contains a contents note that gives chapter titles, the note may be retained in the record if the cataloger feels the contents note gives helpful information about the nature of the work or provides helpful keyword access. This is up to cataloger's judgment and is not required. Do not enhance the contents note in this situation.

When an unenhanced table of contents note for chapter titles is retained in a record, add the phrase [Table of contents] at the beginning of the field.

Example of unenhanced table of contents note:
505 0_ **$a**[Table of contents]. Workers in the United States -- Information technology jobs and standards -- IT fluency : what is it, and why do we need it? -- Campus human resource leadership : a mandate for change -- Recruiting, retaining, and reskilling campus IT professionals -- Technology across the curriculum : information, literacy, and IT fluency.

Items with a collective title
An unenhanced 505 should be constructed with the title and author of all the included works. A separate 700 should be made for each author and title.

Example:
245 02 **$a**A purrfect romance /**$c**Jennifer Blake, Robin Lee Hatcher, Susan Wiggs.

505 0_ **$a**Out of the dark / Jennifer Blake - - A wish and a prayer / Robin Lee Hatcher - - Belling the cat / Susan Wiggs.

700 12 **$a**Blake, Jennifer,**$d**1942-**$t**Out of the dark.
700 12 **$a**Hatcher, Robin Lee.**$t**Wish and a prayer.
700 12 **$a**Wiggs, Susan.**$t**Belling the cat.
Items without a collective title
If the collection lacks a collective title, and one work predominates, treat that title as the title proper and name the other work(s) in a variant title and an added title entry.

If the collection lacks a collective title, and no one work predominates, treat the item as a unit.

Example of works by a single author without a collective title:
100 1_ **$a**Hemingway, Ernest,**$d**1899-1961.
245 14 **$a**The old man and the sea ;**$b** For whom the bell tolls /**$c** Ernest Hemingway.
246 3_ **$a**Old man and the sea ; For whom the bell tolls
740 02 **$a**For whom the bell tolls.

Example of works by different authors without a collective title:
If the collection contains no more than three works, enter under the heading appropriate to the first and make analytical added entries for the second and third works.

100 1_ **$a**Conrad, Joseph,**$d**1857-1924.
245 10 **$a**Heart of darkness /**$c**Joseph Conrad. Ethan Frome / Edith Wharton. Emma / Jane Austen.
246 3_ **$a**Heart of darkness ; Ethan Frome ; Emma
700 12 **$a**Wharton, Edith,**$d** 1862-1937.**$t**Ethan Frome.
700 12 **$a**Austen, Jane,**$d** 1775-1817.**$t**Emma.

If the collection contains four or more works that are entered under four or more different headings, enter the collection under the heading for the work named first. Add a partial enhanced 505 for the other titles. Do not include the first title in the 505.

100 1_ **$a**Austen, Jane, **$d**1775-1817.
245 10 **$a**Sense and sensibility /**$c**by Jane Austen.
505 20 **$t**Age of innocence /**$r**Edith Wharton -- **$t**Far from the madding crowd /**$r** Thomas Hardy -- **$t**Vicar of Wakefield /**$r**Oliver Goldsmith.

COLLECTIVE BIOGRAPHIES
If the collective biography includes 25 names or less, Include an unenhanced 505 for all names. If the collective biography includes more than 25 names, it is optional to include an unenhanced 505. If desired, a partial unenhanced 505 may be included with only those names considered significant.

Transcribe names from the table of contents. However, if the table of contents does not include the entire name of the person, the missing part(s) should be added in brackets.

Example: Table of contents lists Queen Victoria just as Victoria. It should be listed as Victoria [Queen of Great Britain] in the 505.

Use judgment when adding explanatory information.

SOUND RECORDINGS AND MUSIC
List all individual works on a sound recording and a music score. This does not apply to a music instruction book that include short pieces from various songs, but for scores that contain complete songs.

Classical music sound recordings
Make an enhanced 505 and the appropriate analytical entries (700 $a for composer, $t for title).

Pop, folk, ethnic, or jazz sound recordings and music scores
Make an enhanced contents note for these materials.

Include statement of responsibility if appropriate. Will often be the performer and not the composer. Enter a 700 for each performer.

27.Use of summary note (MARC tag 520)

Some material excerpted from "Summary Notes for Catalog Records", by OLAC Cataloging Policy Committee Summary/Abstracts Task Force, 2002. The complete document may be found on the OLAC website: http://www.olacinc.org/drupal/?q=node/21#introduction

MARC tag 520 (Summary note) is used for a brief description of the scope and content of a work. It is useful for patrons and staff when browsing an online catalog.

Local edits for new records brought into Polaris
- Add a summary note to all new records brought in for fiction works of any format (i.e. books, audiobooks, videos, graphic novels, etc). This includes adult, juvenile, and young adult material
- It's optional, but recommended, to add a summary note to records for non-fiction works. If there's a note already in the record, it can be retained, but should be edited as needed

Procedures
- Summary notes should be brief and objective, providing essential details about the contents of the work. Avoid interpretation or evaluation
- If using a description from the item or another source, remove promotional or emotional language
- Keep keyword searching in mind. Include names of people or characters, as well as geographical area and/or time period, if known
- It is not necessary to provide the source of the summary, i.e., Publisher
- If a record contains more than one summary note for the same content, retain the briefest and most objective—edit as needed
- If a description is copied and pasted from a web site, make sure the punctuation marks or special characters display correctly in Polaris

Example: Use this:
In World War II Germany, con man David Walker is convinced by OSS chief Wild Bill Donovan to serve his country by posing as German astrologer Peter Kepler. His mission: use his skills in illusion, sleight of hand and deception to gain Heinrich Himmler's trust and persuade him to assassinate Adolph Hitler.

Not:
"Summer, 1942: The con man known as David Walker didn't exactly volunteer, but OSS chief Wild Bill Donovan convinced him that serving his country and the cause of freedom by posing as German astrologer Peter Kepler was a better use of his time than going to prison. His mission: use his skills in illusion, sleight of hand and deception to gain Heinrich Himmler's trust and persuade him to assassinate Adolph Hitler. Walker walks a tightrope of deceit, playing on the high command's fascination with the occult to penetrate the highest levels of Nazi power in a daring plan to eliminate the Nazi Fuhrer. The Zodiac Deception is a memorable debut, an unforgettable thrill ride through the dark heart of World War II Germany"-- Provided by publisher.

Procedures for individual formats

28.Blu-rays, DVDs, and Blu-ray/DVD combo packs--formatting MARC tag 300 subfield a and use of MARC tag 250

Blu-rays and DVDs

300 _ _ **$a**1 videodisc *(include time if available)*

Add an edition statement from the list below in MARC tag 250 as appropriate to distinguish format:

250 _ _ **$a**[Blu-ray].

250 _ _ **$a**[3D Blu-ray].

250 _ _ **$a**[DVD].

250 _ _ **$a**[3D DVD].

This may be added to an existing edition statement, separated by a comma

250 _ _ **$a**Collectors ed., [Blu-ray].

Blu-ray/DVD combo packs

300 _ _ **$a**[Number] videodiscs *(include time if available)*

Note: Disregard digital copies, if included in container

Add an edition statement, formatted as indicated below, alone or as an addition to an existing edition statement:

250 _ _ **$a**[Format/Format combo].

Example: [3D Blu-ray/Blu-ray/DVD combo]

29.Large print and larger print materials

Large print

All large print materials should be on a record for large print. They cannot be added to a record for the regular print. Material must meet the criteria for large print as defined in National Association for Visually Handicapped (NAVH) standards.

Do not use these procedures for material designated as "larger print"—see the section below.

Fixed fields

 Form: d

General material designation (gmd)

Add a general material designation to the 245 for all large print book records in Polaris.

Note: This is a local edit only. Do not add to master records in OCLC

|h [text (large print)]

245 10 **$a**All along the watch tower**$h**[text (large print)] /**$c**by Jane Worth.

245 10 **$a**Gone fishing**$h**[text (large print)] :**$b**a novel /**$c**by Matt Gibbons.

Edition statement

If the item has a large print edition statement, code that in a 250.

250 _ _ **$a**Gale large print ed.

Physical description
Add (large print) after the pagination.

300 _ _ **$a**356 p. (large print) ;**$c**28 cm.

Subject headings
Add a subject heading for large type books in addition to any other appropriate subject headings. Do not add subdivisions to the large type books subject heading. This should be the last subject heading in the record.

655 ^0 Large type books.

"Larger print" materials
"Larger print" materials cannot be added to the bibliographic record for the regular print or for the large print version even if the publisher is the same and/or the date is the same. "Larger print" materials must be cataloged on a separate record. Items that are marketed as "larger print" will not be treated as large print in the bibliographic record:

- **Do not** add the large print gmd to the 245
- **Do not** add *(large print)* to the 300
- **Do not** add the subject heading *Large type books.*

Fixed fields (Local edit)
Delete code d from the Form fixed field. This is necessary to prevent Polaris from generating a Large Print icon in the PAC.
Note: This is a local edit only. Do not delete this in master records in OCLC.

Edition statement
Add the following edition statement to larger print records in OCLC to keep the records from being merged incorrectly in WorldCat.

250 _ _ **$a**[Larger print ed.]

Subject headings
Add a local subject heading for Larger type books in addition to any other appropriate subject headings. Do not add subdivisions to the larger type books subject heading. This should be the last subject heading in the record.
Note: This is a local edit only. Do not add to master records in OCLC

690 _ _ **$a**Larger type books.

30. Sound recordings Return to Table of Contents
General material designation (gmd)
--For all sound recordings except preloaded audio players. This includes records for audiobooks with an
   accompanying book: [sound recording]
--For preloaded audio players (i.e. Playaways, GoReaders): [electronic resource]

Note: Local edit: Add a gmd to RDA records for sound recordings or preloaded audio players

Edition statement
Add the following edition statements, as appropriate. These may be added to an existing edition statement, separated by a comma:

--Add an edition statement to records for MP3 sound recordings and vinyl albums to distinguish format
--Add an edition statement to records for preloaded audio players such as Playaway and GoReader to
  distinguish brand
--Add an edition statement to records for audiobooks to indicate abridged or unabridged. The statement
  should be in brackets unless there is a specific abridged or unabridged edition statement on the item.
  The abridged or unabridged edition statement should come first in the 250 field, followed by any other
  appropriate edition statements

Note: This is a local edit only. Do not add to master records in OCLC

Examples:

MP3
245 **$h**[sound recording]
250 _ _ **$a**Anniversary edition, [MP3-CD].

Preloaded audio player
245 **$h**[electronic resource]
250 _ _ **$a**[Abridged], [Playaway],

Vinyl albums
245 **$h**[sound recording]
250 _ _ **$a**[Vinyl LP]. *or* [Vinyl EP].

Audiobooks
Edition statement is on item: 250 _ _ **$a**Unabridged edition.

Abridged or unabridged is on item, but does not include specific edition statement:
250 _ _ **$a**[Abridged].

Subject headings
Add the following subject headings, as appropriate:

MP3
655 _0 **$a**MP3 (Audio coding standard)

Preloaded audio players
655 _0 **$a**Electronic books.
655 _0 **$a**Playaway (Preloaded audio player)
690 _ _ **$a**GoReader (Preloaded audio player)

Fixed field
For Playaways, code Fixed field *Form of Item* (position 29) as q – direct electronic. Code other fixed fields as appropriate for sound recordings.

Polaris Type of Material (TOM)
Audiobooks
When audiobook records are exported into Polaris, they will display a TOM of Nonmusical sound recording.
Edit audiobook records as indicated below to generate the Polaris format icon Audiobook:

--Add MARC tag 006 with code a in subfield a (position 00). It is not necessary to code any other positions. This
   is how it will look in the record:

006 _ _   a||||||||||||||| ||

--Code position 012 (Special playback char) in MARC tag 007 as u (unknown). Code other positions as
   appropriate.

Note: This is a local edit only. Do <u>not</u> make these changes to OCLC master records.

Book and CD
Edit records as indicated below to generate the Polaris format icon Book + CD:

Add MARC tag 006 with code a in subfield a (position 00). Code other subfields as appropriate.

Do not make any changes to MARC tag 007.

Other nonmusical sound recordings
If your resource truly is a nonmusical sound recording and not an audiobook, ensure MARC tag 007 is coded
correctly, but no other action is required. Examples are recordings of speeches, interviews, sound effects, etc.

31. Graphic novels
Bibliographic Record
Do not use serial records or set records for graphic novels—use a monograph record for the individual volume.

Subject headings
Use the free-floating form subdivision $v Comic books, strips, etc. with all topical headings.
Examples:
650 _0 **$a**Runaway teenagers**$v**Comic books, strips, etc.
650 _0 **$a**Voyages and travels**$v**Comic books, strips, etc.

Form and Genre headings (655)
Assign genre headings from the LCGFT as appropriate. Use the following form heading for all graphic novels
and comic book compilations:
655 _7 **$a**Graphic novels.**$2**lcgft

Translations/adaptations
When a translated work has been adapted, enter the work under the person responsible for the adaptation.
Make an added entry for the original author. Example:

100 1_ **$a**Jones, Gerard.
245 10 **$a**Dragon ball. $n Vol. 1 /**$c**story and art by Akira Toriyama ; [English adaptation by Gerard Jones].
700 1_ **$a**Toriyama, Akira.

32.Playaway Views

Playaway View is a device that contains preloaded video content. Catalog as you would a videorecording, with the following special instructions:

General material designation (gmd) -- use [electronic resource]
Note: Local edit: Add a gmd to RDA records for preloaded video players. Do not add to master records in OCLC.

Edition statement
Add the edition statement [Playaway View]. This may be added to an existing edition statement, separated by a comma.

Note: This is a local edit only. Do not add to master records in OCLC.

Example:
245 **$h**[electronic resource]
250 _ _ **$a**Collectors edition, [Playaway View].

Physical description
"Video media player" is the term in common use in records for this device.

Record the term "1 video media player (include time of feature presentation, if available)" in subfield a.
Record the term "digital" in subfield b, and the dimensions of the player in subfield c.

Example:
300 _ _ **$a**1 video media player (ca. 51 min.) :**$b**digital ;**$c**3 1/2 x 4 1/2 in.

Notes
If not already in the record, add the following notes, in addition to all other appropriate notes:
500 _ _ **$a**Issued on Playaway View, a dedicated video media player.
500 _ _ **$a**Powered by rechargeable battery; container includes one electrical power adapter.
500 _ _ **$a**Earphones not required for audio playback.

Subject headings
Add the following subject heading in addition to all other applicable headings:
690 _ _ **$a**Playaway View (Preloaded video player)

Note: This is a local edit only. Do not add to master records in OCLC.

Fixed field
Code Fixed field *Form of Item* (position 29) as q – direct electronic. Code other fixed fields as appropriate for videorecordings.

Polaris Type of Material (TOM) -- Videorecording
Make sure there's an 007 in the record for videorecordings. This is what generates the TOM, so add it if needed. There should also be an 006 and an 007 in the record for the electronic resource aspect of the item.

Example:

007 – For the videorecording aspect of the Playaway View
Category of material   v (Videorecording)
Specific mat'l desig   z (Other)
Color   Code as appropriate
Videorecording format   z (Other)
Sound on medium/sep   Code as appropriate
Medium for sound   z (Other)
Dimensions   z (Other)
Config of playback channels Code as appropriate

007 – For the electronic resource aspect of the Playaway View
Category of material   c (Electronic resource)
Specific mat'l desig   z (Other)
Color   Code as appropriate
Dimensions   z (Other)
Sound   Code as appropriate
All other positions: | (No attempt to code)

006 – Electronic resource
Format of material: m (Computer file/electronic resource)
Audience: Code as appropriate
Form: q (Direct electronic)
Type of file: z (Other)
Government publication: Code as appropriate

33. Video games and computer games
General material designation (gmd) -- use [electronic resource]
Note: Local edit: Add a gmd to RDA records for video games and computer games. Do not add to master records in OCLC.

Edition statement
Add an edition statement in the format below for the game system or computer type. This may be added to an existing edition statement, separated by a comma.
Add an edition statement to all records for the Playaway LaunchPad.

Examples:
250 __ $aPS4.
250___ $aPSP.

250___$aPC compatible.
250___$aMAC compatible.
250___$aVersion 1.2, PC compatible.
250___$a[Playaway LaunchPad].
Note: This is a local edit only. Do not add to master records in OCLC.

Physical description
Blu-ray disc is not acceptable in the 300—this should be mentioned in the 538.

Notes
The 538 should also include single or multi-player information. The name of the console should be spelled out in the 538. Include the broadcast standard and regional encoding if on piece.

Examples:
538___$aSystem requirements: PlayStation 2; NTSC U/C; memory card (for PS2) – 296 KB; digital control; analog control; vibration function; multitap (for PS2). Multi-player.

538___$aSystem requirements: PlayStation 4; 6.1 GB minimum hard disc space; 1080p HD video output; DualShock 4. Blu-ray disc; NTSC; Region 1. Multi-player.

538___$aSystem requirements: PlayStation portable; region 1; wi-fi compatible.

538___$aSystem requirements: Windows 95, 98, 2000, Me, XP or later; Pentium II 266MHZ or faster processor; 32MB RAM; minimum 20MB hard disk space available; 16-bit color; 8x CD-ROM drive; Windows-compatible sound card.

538___$aSystem requirements for Mac: iMac/G3 233MHz or faster processor; System 8.6-9.2.2, OS X 10.1.2 or later; 32MB RAM; Minimum 20MB hard disk space available; 16-bit color; 24x CD-ROM drive.

Add a 500 note with the number of players. If the game can be played online with multiple players include that information here as well. Transcribe this information from container.

Examples:
500___$a1-4 players; online up to 16 players
500___$a1-4 players; online multi-player.
500___$a1-4 players; network players 2-4 co-op, 2-18 competitive.

Add a 521 note for rating.

Examples:
521 8__$aESRB content rating: E, Everyone (Mild lyrics).
521 8__$aESRB content rating: M, Mature 17+ (Blood and gore, intense violence, strong language).

Subject headings
Use the free-floating form subdivision $v Computer games with all topical headings.

Examples:

650 _0 $aHand-to-hand combat$vComputer games.

650 _0 $aZombies$vComputer games.

Form and genre headings

Use the following form heading for all video games:

655 _0 $aVideo games.

Use the following form heading for all computer games:

655 _7 $aComputer games.$2local

When applicable, other possible headings include:

655 _0 $aComputer adventure games.

655 _0 $aComputer baseball games.

655 _0 $aComputer flight games.

655 _0 $aComputer war games.

655 _0 $aComputer word games.

655 _0 $aEducational games.

655 _0 $aFantasy games.

655 _0 $aGame Boy video games.

655 _0 $aNintendo GameCube video games.

655 _0 $aNintendo video games.

655 _0 $aNintendo Wii video games.

655 _0 $aSega Dreamcast video games.

655 _0 $aSega Genesis video games.

655 _0 $aSega Saturn video games

655 _0 $aSimulation games.

655 _0 $aSony video games.

655 _0 $aTurboGrafx video games.

655 _0 $aVideo wrestling games.

655 _0 $aXbox video games.

Add the following local subject heading to records for the Playaway LaunchPad:

690 __$aPlayaway LaunchPad (Preloaded tablet computer)

Note: This is a local edit only. Do not add to master records in OCLC.