



Editing Checklist—Books

This is not an exhaustive checklist. Here are some places where you can get further information:

RDA Toolkit (subscription required): www.rdatoolkit.org

On the SHARE website:

For local practices on cataloging, look under Cataloging>Operational guidelines.

MARC tag guidance is available from:

OCLC's Bibliographic Formats and Standards: <http://www.oclc.org/bibformats/en.html>

MARC 21 for Bibliographic Records: <https://www.loc.gov/marc/bibliographic>

Within bibliographic records:

In Polaris: Place your cursor in the tag and the tag information will appear at the bottom of your record.

Note: Tag information won't display if record is maximized.

In Connexion: In the variable fields, right-click anywhere in the field, and click on MARC Field Help. In the fixed fields, click on the field name.

NOTE: Examples in this document show only some of the possibilities. See OCLC's Bibliographic Formats and Standards or the MARC 21 for Bibliographic Records website for more examples.

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Edits to OCLC master record

Examples reflect spacing and display of subfields in OCLC records. Subfield a at the beginning of a field does not display in OCLC. Other subfields at the beginning of a field will display.

Variable Fields

Field	Action	Example
040	Add subfield e with <i>rda</i> when converting record to RDA. Subfield e comes before subfield c.	040 _ _ IEU #b eng #e rda #c IEU
020	If there is more than one ISBN, record each in a separate 020. Include price only if listed on the item. Record qualifying information in subfield q, in parenthesis. Subfield q comes before subfield c.	020 _ _ 0743524810 : #c \$4.99 020 _ _ 9780743524815 020 _ _ 9780743524815 #q (pbk.) : #c \$4.99
041	Language code(s) of contents, if in more than one language, as recorded in MARC tag 546. Code 1 st indicator as appropriate. Each code should be in a separate subfield—older records may have multiple codes in one subfield.	041 1 _ eng #a fre #a spa #h eng
1XX	Authorized form of creator name, as established in an authority record, which may not be the same as on the item. 1XX may be personal name (100), family name (100), corporate body name (110), or conference name (111). Verify tag, form of name, and 1 st indicator. Add subfield e with appropriate relator term. Editors recorded in 1XX should be changed to 7XX. Compilers recorded in 1XX should be changed to 7XX as appropriate.	100 1 _ Poe, Edgar Allen, #d 1809-1849, #e author. On item: Edgar A. Poe 100 1 _ Bryson, Bill, #e author.
245 Ind 1	If 1XX field is present, 1 st indicator should be 1.	100 1 _ Francis, Dick, #e author. 245 14 The edge / #c by Dick Francis.

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	If no 1XX field, 1 st indicator should be 0.	If no 1XX: 245 04 The edge
245 Ind 2	Used to ignore non-filing characters and initial articles, including initial articles in foreign languages. This tells the system how many characters to skip before reading the title, including the space between the article or character and the next word. If there are no characters to be skipped, 2 nd indicator will be 0. Examples shown do not include statement of responsibility or any applicable 1XX field.	245 10 April showers 245 04 The time of day 245 13 An alligator 245 04 Les poissons 245 08 The ... travel guide
245	Make sure the title and statement of responsibility are transcribed as they appear on the title page or title page substitute. If title comes from a source other than the item itself, enter in brackets and indicate the source in a 500 note. The 245 always ends in a period.	245 14 [Jackson family history] / #c Amanda Jackson Barnham. 500 __ Title devised by cataloger.
246	Add as applicable. Do not record initial articles in variant titles. Do not use ending punctuation. See OCLC bib formats for possible 1st and 2nd indicators: http://www.oclc.org/bibformats/en/2xx/246.shtm	245 10 Holidays : #b the complete guide to seasonal decorations. 246 30 Complete guide to seasonal decorations
250	Record edition statement as it appears on the item. Multiple edition statements may be entered in separate 250 fields, or in one 250, separated by a comma. Add edition statement to records for larger print books to keep them from being incorrectly merged. Add edition statement in records that include accompanying material in 300 subfield e to keep them from being incorrectly merged.	250 __ First HarperTrophy edition, revised edition. <i>or</i> 250 __ First HarperTrophy edition. 250 __ Revised edition. 250 __ [Larger print edition]. 250 __ Revised edition, [with accompanying material].
264	May have multiple 264s with indicators for different functions (production, publication, distribution, manufacture, copyright).	264 _1 New York : #b Random House, #c [2013]

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	<p>1st indicator will be blank, unless the record is for a serial. 2nd indicator will be 0-4. 264 for Copyright Notice Date does not have ending punctuation.</p>	<p>264 _4 #c ©2013</p>
300	<p>Make sure the physical description is complete and punctuation is correct. For large print books, add the notation “(large print)” after the page numbers in subfield a. Do <u>not</u> add “(large print)” after the page numbers for "Larger print" books. “cm” is considered a symbol, not an abbreviation. 300 field ends in a period only when 4XX field is present in the record. When converting records to RDA, spell out abbreviations.</p>	<p>300 __ vi, 47 pages (large print) ; #c 24 cm + #e 1 hand puppet.</p> <p>300 __ 1 volume (unpaged) : #b color illustrations ; #c18 cm.</p> <p>300 __ 30 unnumbered leaves : #b illustrations, maps, portraits ; #c 30 cm</p>
33X	<p>Fields 336, 337, and 338 describe content, media, and carrier type. Use OCLC macro to add if needed; otherwise, verify information is correct. Records describing more than one format of material should have appropriate 33X fields for each format.</p>	<p>For books: 336 __ text #b txt #2 rdacontent 337 __ unmediated #b n #2 rdamedia 336 __ volume #b nc #2 rdacarrier</p>
340	<p>Add to records for large print and larger print materials. Include subfield 2 if term is taken from list in RDA Toolkit; otherwise, omit subfield 2</p>	<p>340 __ #n large print #2 rda</p> <p>340 __ #n larger print</p>
490	<p>Field 490 contains series statement as it appears on the resource. Check for a series authority record and edit accordingly. Some series-like statements are recorded as a quoted note in field 500 rather than 490/8XX. If series is untraced, 490 1st indicator will be 0. If series is traced, 490 1st indicator will be 1, and there must also be an 800 or 830 field with the authorized form of the series, which may or may not be the same as the form in the 490. No ending punctuation on field 490, but there is ending punctuation on the 8XX fields.</p>	<p>490 1_ Reading rainbow book 830 _0 Reading rainbow book.</p> <p>490 1_ Animal Ark 800 1_ Baglio, Ben M. #t Animal Ark.</p> <p>500 __ “Sunrise books.”</p>

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5XX	<p>Include applicable notes. These examples are only some of the possibilities.</p> <p>Check OCLC's bib formats for indicators and ending punctuation as applicable.</p>	<p>500 __ On board pages. 504 __ Includes bibliographical references (pages 34-37) and index. 520 __ Sally is nervous and excited—it's the first day of school! 521 1_ 008-012.</p>
505	<p>Add or enhance 505 if needed to index titles of short stories, poems, etc. Do not remove initial articles from titles in an enhanced 505.</p>	<p>505 00 #t The raven -- #t The pit and the pendulum.</p>
6XX	<p>Review subject headings to make sure they are appropriate. Add subject headings as needed, especially genre headings and headings for fictitious characters.</p> <p>Note: Many fictitious characters have been established in a name authority record, but some are still coded as subjects. Verify in the authority file.</p>	<p>650 _0 Tap dancing.</p> <p>600 10 Duck, Donald #c (Fictitious character) #v Juvenile fiction. 650 _0 Haller, Mickey (Fictitious character) #v Fiction.</p> <p>651 _0 Toronto (Kan.) 651 _0 Edinburgh (Scotland)</p> <p>655 _7 Science fiction. #2 lcgft 655 _0 Young adult fiction. 655 _7 Graphic novels. #2 lcgft</p>
7XX	<p>Name(s) of contributor(s) as established in an authority record, which may not be the same as on the item. 7XX may be a personal name (700), family name (700), corporate body name (710), or conference name (711). Verify form of name and 1st indicator. Remove initial articles from titles in subfield t. In OCLC master records, relator information may be recorded either in subfield e (relator term) or subfield 4 (relator code). Do not include subfield e or subfield 4 when subfield t is present.</p>	<p>700 1_ Bradlee, Frederic, #d 1920- #e editor.</p> <p>710 2_ Disney Art Studios (Firm), #e illustrator.</p> <p>700 1_ Poe, Edgar Allen, #d 1809-1849. #t Raven.</p>

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OCLC Fixed Fields

Converts to the 008 or LDR field when imported into Polaris. The list below is not all the fixed fields, but includes the ones that you might need to edit.

Type	a
ELvl	If upgrading a less-than-full-level record, enter code l.
Audn	Code as appropriate.
Lang	Make sure code agrees with the language of the piece, or the first language code in the 041 field, if present.
Form	Code as appropriate. Enter code d if the item is large print.
Conf	Code as appropriate. 0 if item is not a conference publication; 1 if item is a conference publication.
Biog	Code as appropriate if item is an autobiography, biography, collective biography, or has biographical information.
Ctry	Make sure code agrees with the place of publication in 264 _1, first subfield a.
Cont	Code as appropriate. Enter up to 4 codes. Enter code b if item contains bibliographical references in MARC tag 504.
GPub	Code as appropriate if item is published by a government agency.
LitF	Code as appropriate for fiction or nonfiction.
Indx	Code as appropriate. Enter code 1 if index is noted in MARC tag 500 or 504.
Desc	Code i for RDA.
Ills	Code as appropriate for illustrations. Up to 4 codes may be used, entered alphabetically.
Fest	Code as appropriate. 0 if item is not a festschrift; 1 if item is a festschrift.
DtSt	s for a single date in 264 _1, subfield c t if there is a publication date and copyright date in 264 _1 and 264 _4 q for a range of dates
Dates	Should agree with date(s) in 264, subfield c.

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SHARE local edits

**May be done in OCLC prior to exporting or in Polaris after record has been brought in
Do not save local edits to OCLC master record. Examples reflect spacing of subfields in Polaris.**

Field	Action	Example
Format icons	<p>Make sure the LDR and 008 fields are coded correctly to facilitate searching and to generate the correct format icon in the PAC.</p> <p>In records for larger print books, change code in <i>Form of Item</i> from <i>d (Large print)</i> to <i>blank – (None of the following)</i>. This prevents the Large Print format icon from being generated in the PAC.</p> <p>In order to generate the appropriate format icon, delete or retain tag 007 as needed in records where the book is the predominant format and the 007 represents format of accompanying material.</p> <p>See Polaris Help on <i>Type of Material Codes (TOMs)</i> for correct coding.</p>	
1XX	See SHARE cataloging standards for local practice on use of relator terms.	100 1_ #a Sendak, Maurice, #e author, #e illustrator.
245	If OCLC record is imported with title in all caps, edit to AACR formatting to distinguish from on-order records.	
245 subfield h	<p>Add this subfield for large print books. Subfield h comes after subfields a, n, and/or p, but before subfield b</p> <p>Do not add this subfield for larger print books.</p>	<p>245 14 #aThe trees of North America.#pPines and firs of Canada#h[text (large print)]</p> <p>245 10 #aNational velvet#h[text (large</p>

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		print)] :#b a novel
250	Enter multiple edition statements in a single 250, separated by a comma.	250 __ #aFirst HarperTrophy edition, revised edition.
300	Delete "(large print)" after page numbers in 300 subfield a in records for larger print material.	
490/8XX	See SHARE cataloging standards for policy on creation of local series authority records for items that are part of a series but a series authority record is not available in OCLC.	
5XX	See SHARE cataloging standards for local practice on contents notes, summary notes, etc.	
6XX	<p>See SHARE cataloging standards for local practice on which subject headings are retained, which are deleted, use of genre terms, approved local subject headings, etc. Also see SHARE local practices for individual formats.</p> <p>Add genre headings, form headings, or approved local subject headings as appropriate. See SHARE cataloging standards for a list of approved local subject headings.</p> <p>For juvenile material, use the adult subject heading with a juvenile subdivision as appropriate. Delete or edit juvenile subject headings coded as 650 2nd ind 1, unless there is no equivalent adult subject heading. In this case, the record should have both the adult and juvenile subject headings.</p> <p>Always add the appropriate form subject heading for large print books, larger print books, and graphic novels.</p>	<p>650 _0#aDogs#vJuvenile fiction. Not: 650 _1#aDogs#vFiction. <i>But:</i> 650 _0#aInfants#vJuvenile fiction. And: 650 _1#aBabies#vFiction. (Babies is not an adult subject heading)</p> <p>For large print books, add: 655 _0#aLarge type books.</p> <p>For larger print books, add: 690 __ #aLarger type books.</p> <p>For graphic novels, add: 655 _7#aGraphic novels.#2lcgft</p>
7XX	See SHARE cataloging standards for local practice on use of relator terms.	700 1_ #aNiles, Burgundy,#eillustrator.