



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>Policies and Procedures.

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 field elements, click on the element 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
General	<p>--Ending punctuation is now optional in many fields where it previously was required. You don't need to add if the punctuation is omitted (For those using MARC Report: You can disregard the error message)</p> <p>--Note: Punctuation preceding subfields <u>within</u> a field is still required</p> <p>--Note: Ending punctuation is still required in authorized access point fields: 1XX, 6XX, 7XX, and 8XX</p> <p>--Examples in this document include ending punctuation</p>	
040	<p>--Add #e with <i>rda</i> when upgrading record to RDA</p> <p>--#e comes before #c</p>	040 _ _ IEU #b eng #e rda #c IEU
020	<p>--Record multiple ISBNs in separate 020 fields</p> <p>--Include price only if listed on the item</p> <p>--Record qualifying information in #q, in parenthesis</p> <p>--#q comes before #c</p>	<p>020 _ _ 0743524810 : #c \$4.99</p> <p>020 _ _ 9780743524815</p> <p>020 _ _ 9780743524815 #q (pbk.) : #c \$4.99</p>
041	<p>--Language code(s) of contents, if in more than one language, as recorded in MARC tag 546</p> <p>--If work is in multiple languages, 1st indicator will be 1</p> <p>--Multiple codes in one subfield should be split into separate subfields</p>	041 1 _ eng #a fre #a spa #h eng
1XX	<p>--Authorized form of creator name, as established in an authority record; may not be the same as on the item</p> <p>--May be personal name (100), family name (100), corporate body name (110), or conference/meeting name (111)</p> <p>--If no authority record, format name as instructed in RDA Toolkit</p> <p>--Verify tag, form of name, and 1st indicator</p>	<p>100 1 _ Poe, Edgar Allen, #d 1809-1849, #e author. On item: Edgar A. Poe</p> <p>100 1 _ Bryson, Bill, #e author.</p>

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	<p>--Add #e with appropriate relationship designator</p> <p>--Editors recorded in 1XX should be changed to 7XX</p> <p>--Compilers recorded in 1XX should be changed to 7XX as appropriate</p>	
245 Ind 1	<p>--If 1XX field is present: 1</p> <p>--If no 1XX field: 0</p>	<p>100 1 _ Francis, Dick, #e author.</p> <p>245 14 The edge / #c by Dick Francis.</p> <p>If no 1XX:</p> <p>245 04 The edge</p>
245 Ind 2	<p>--0-9</p> <p>--Tells the system to ignore non-filing characters and initial articles when searching, including initial articles in other languages. Includes the space between the article or character and the next word</p> <p>--If there are no characters to be skipped, 2nd indicator is 0</p> <p>Note: Examples shown do not include statement of responsibility or any applicable 1XX field.</p>	<p>245 10 April showers</p> <p>245 04 The time of day</p> <p>245 13 An alligator</p> <p>245 04 Les poissons</p> <p>245 08 The ... travel guide</p>
245	<p>--Transcribe title and statement of responsibility as they appear on the title page or title page substitute</p> <p>--If title comes from source other than the title page, include a 500 note with the source of the title</p> <p>--If title comes from a source other than the item itself, enter in brackets, and include a note indicating the source of the title</p> <p>--If no title is available from any source, cataloger devises title</p>	<p>245 10 [Jackson family history] / #c Amanda Jackson Barnham.</p> <p>500 __ Title devised by cataloger.</p>
246	<p>--Add as applicable</p> <p>--Do not record initial articles</p> <p>--Do not add ending punctuation that is not part of title</p> <p>--See OCLC bib formats for possible 1st and 2nd indicators:</p> <p>http://www.oclc.org/bibformats/en/2xx/246.shtm</p>	<p>245 10 Holidays : #b the complete guide to seasonal decorations.</p> <p>246 30 Complete guide to seasonal decorations</p>

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250	<p>--Record edition statement as it appears on the item</p> <p>--Spell out abbreviated words as needed to match wording on the item</p> <p>--Multiple edition statements may be in separate 250 fields, or in one 250, separated by a comma</p> <p>--Add edition statement in records with 300 #e (accompanying material) to keep them from being incorrectly merged</p> <p>--Add edition statement to records for larger print books to keep them from being incorrectly merged</p>	<p>250 __ First HarperTrophy edition, revised edition.</p> <p style="text-align: center;"><i>or</i></p> <p>250 __ First HarperTrophy edition.</p> <p>250 __ Revised edition.</p> <p>250 __ [Larger print edition].</p> <p>250 __ Revised edition, [with accompanying material].</p>
264	<p>--May have multiple 264s with indicators for different functions (production, publication, distribution, manufacture, copyright)</p> <p>--1st indicator: blank</p> <p>--2nd indicator: 0-4</p> <p>--264 for a Copyright Notice Date does not have ending punctuation</p>	<p>264 _1 New York : #b Random House, #c [2013]</p> <p>264 _4 #c ©2013</p>
264 #a	<p>--Transcribe place of publication as it appears on the item</p> <p>--If a place name is entered in brackets, do not abbreviate. Spell out if abbreviated in the record</p> <p>--If a record has “[S.I.]” or “[Place of publication not identified]”, enter a place if possible, even if only a country</p> <p>Note: Be sure to code the Ctry fixed field accordingly.</p>	<p>264 _1 [Chicago, Illinois]</p> <p>Not: 264 _1 [Chicago, Ill.]</p>
264 #b	<p>--Transcribe name of publisher as it appears on the item, including Inc., Ltd, etc.</p> <p>--If publisher name is shortened or truncated in the record, edit to match the item</p> <p>--If a record has “[s.n]”, try to determine a publisher and enter in brackets. If a publisher can’t be determined, enter “[publisher not identified]”</p>	<p>264 _1 #b Alfred A Knopf, an imprint of Random House Children’s Books,</p>
264 #c	<p>--If a publication date is entered with dashes, or if the record has “[date of publication not identified]”, change to an estimated date or range of dates, in brackets. Include a question mark after the date(s) if date(s) are a guess</p>	<p>264 _1 #c [between 1900 and 1999]</p> <p>Not: #c [19--]</p>

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	Note: Be sure to code the DtSt and Date fixed fields accordingly.	
300	<p>--Make sure physical description is complete and punctuation is correct</p> <p>--Spell out abbreviations</p> <p>--For large print and larger print books, add "(large print)" after the page numbers in #a</p> <p>--Do not spell out "cm"--considered a symbol, not an abbreviation</p> <p>--Change "[XX] pages" to "XX unnumbered pages"</p> <p>--300 field may end in a period when 4XX field is present</p>	<p>300 __ vi, 47 pages (large print) ; #c 24 cm + #e 1 hand puppet.</p> <p>300 __ 1 volume (unpaged) : #b color illustrations ; #c 18 cm.</p> <p>300 __ 30 unnumbered leaves : #b illustrations, portraits ; #c 30 cm</p>
33X	<p>--336, 337, and 338 describe content, media, and carrier type</p> <p>--Use OCLC macro to add if needed; otherwise, verify information is correct</p> <p>--Records describing more than one format of material should have appropriate 33X fields for each format</p>	<p>For books:</p> <p>336 __ text #b txt #2 rdacontent</p> <p>337 __ unmediated #b n #2 rdamedia</p> <p>336 __ volume #b nc #2 rdacarrier</p>
340	--Add #n with <i>large print</i> to records for large print and larger print materials	340 __ #n large print #2 rdafs
341	<p>--Use to describe alternative modes of access to primary or secondary content</p> <p>--1st indicator: blank, 0, or 1</p> <p>--2nd indicator: Blank</p> <p>--Do not use if there is no alternative mode of access, i.e, a book that is only braille, or only large print</p> <p>--Use the following terms in #a:</p> <ul style="list-style-type: none"> ---auditory ---tactile ---textual ---visual <p>--Use the following terms in #b, #c #d or #e as appropriate:</p> <ul style="list-style-type: none"> ---audio description ---braille ---captions 	341 1 _ textual #e braille

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	<p>---sign language ---transcript --Omit #2</p>	
380	<p>--Describes form of work. If present, do not delete --If not present, do not need to add</p>	
490	<p>--Series statement as it appears on the resource --If series is untraced: 490 1st indicator is 0. Check the authority file! Sometimes a traced series is incorrectly entered as untraced --If series is traced: 490 1st indicator is 1. Field 800 or 830 should also be present with authorized form of the series; may or may not be the same as the form in the 490 --No ending punctuation in field 490; there is ending punctuation in 8XX fields --Some series-like statements are recorded as a quoted note in field 500 rather than 490/8XX. Check the authority file!</p>	<p>490 1_ Reading rainbow book 830 _0 Reading rainbow book. 490 1_ Animal Ark 800 1_ Baglio, Ben M. #t Animal Ark. 500 _ _ “Sunrise books.”</p>
5XX	<p>--Include applicable notes. These examples are only some of the possibilities --Check OCLC bib formats for indicators and subfields as applicable</p>	<p>500 _ _ On board pages. 500 _ _ Title from cover. 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 if needed to index titles of short stories, poems, etc. --Include initial articles</p>	<p>505 00 #t The raven -- #t The pit and the pendulum.</p>
532	<p>--Accessibility features, hazards, and deficiencies of a resource --1st indicator: blank, 0, 1, 2, or 8 --2nd indicator: Blank</p>	<p>532 1 _ Alternate pages of print and braille</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>650 _0 Tap dancing. 600 10 Duck, Donald #c (Fictitious character) #v Juvenile fiction.</p>

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	<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 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>--Added entries—names and/or related works --May be a personal name (700), family name (700), corporate body name (710), or conference/meeting name (711) --Enter name(s) as established in an authority record; may not be the same as on the item --Verify form of name and 1st indicator --If no authority record, format name as instructed in RDA Toolkit --Relationship designator may be present either in #e (relator term) or #4 (relator code) --If not present, add #e with relationship designator --Do not include #e or #4 when #t is present --Remove initial articles from titles in #t --Add #i with relationship information in author/title entries and entries for related works --Add 730 for contents of resources with multiples titles, or works in multiple languages</p>	<p>700 1_ Bradlee, Frederic, #d 1920- #e editor.</p> <p>710 2_ Disney Art Studios (Firm), #e illustrator.</p> <p>700 12 #i Container of (expression): #a Seuss, #c Dr. #t Cat in the hat. #i Italian.</p> <p>730 0_ #i Adaptation of (work): #a Tangled (Motion picture)</p>

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OCLC Fixed Field Elements

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

Type	a (language material)
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 or larger 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 #a
Cont	Code as appropriate. Enter up to 4 codes. Enter code b if record contains MARC tag 504 indicating bibliographical references
GPub	Code as appropriate if item is published by a government agency
LitF	Code as appropriate for fiction or nonfiction. May use general or more specific codes
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	r if item is a reprint. Enter publication date in Date 1. Enter date of original in Date 2 (may be found in a note) s for a single date in 264 _1, #e 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, #c, or in a note

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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 and display of subfields in Polaris.

SHARE cataloging local practices may be found on the SHARE website at [Cataloging>Policies and Procedures](#).

Field	Action	Example
Format icons	<ul style="list-style-type: none"> --Make sure applicable fields are coded correctly to facilitate searching and to generate the correct format icon in the PAC --Delete or retain tag 006/007 as needed to generate the appropriate format icon in records where the book is the predominant format and the 007 represents format of accompanying material --See Polaris Help on <i>Type of Material Codes (TOMs)</i> for correct coding 	
1XX	--See SHARE cataloging standards for local practice on use of relationship designators	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 #h	<ul style="list-style-type: none"> --Add this subfield for braille, large print, and larger print books --Subfield h comes after #a, #n, and/or #p, but before #b 	<p>245 04 #aThe trees of North America.#pPines and firs of Canada#h[text (large print)]</p> <p>245 10 #aNational Velvet#h[braille]:#ba novel</p>
250	<ul style="list-style-type: none"> --Enter multiple edition statements in a single 250, separated by a comma --See SHARE cataloging standards for local practice on entering edition statements when paperbacks and hardbacks may be attached to the same record 	250 __ #a First HarperTrophy edition, revised edition.

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264	<p>--If copyright date is used as implied publication date, add 264 _4 #c with copyright date</p> <p>--If copyright date is different than publication date, add 264 _4 #c with copyright date</p> <p>--Code fixed field DtSt (Type of date) as t</p> <p>--Enter publication date in Date 1 and copyright date in Date 2</p>	<p>264 _1 #aNew York :#bRandom House,#c[2013]</p> <p>264 _4 #c©2013</p> <p>264 _1 #aNew York :#bRandom House,#c2013.</p> <p>264 _4 #c©2011</p>
490/8XX	<p>--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</p>	
5XX	<p>--See SHARE local practice on contents notes, summary notes, reading program information, etc.</p>	
6XX	<p>--See SHARE local practice on which subject headings are retained or deleted, use of genre headings, approved local subject headings, etc.</p> <p>--For juvenile material, use the adult subject heading with a juvenile subdivision as appropriate</p> <p>--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>--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>--Always add the appropriate genre/form 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 and larger print books, add: 655 _0#aLarge type books.</p> <p>For graphic novels, add: 655 _7#aGraphic novels.#2lcgft 655 _7#aComics (Graphic works)#2lcgft</p>
7XX	<p>--See SHARE local practice on use of relationship designators</p>	<p>700 1_ #aNiles, Ben,#eillustrator.</p>