



Editing Checklist – Books

Resources

- Original RDA Toolkit (subscription required): [RDA Toolkit](#)
- MARC 21 for Bibliographic Records: [MARC 21 Format for Bibliographic Data: Table of Contents \(Network Development and MARC Standards Office, Library of Congress\)](#)
- OCLC's Bibliographic Formats and Standards page: [Bibliographic Formats and Standards - OCLC](#)
- SHARE Policies and Procedures: [Bibliographic & Cataloging Standards | SHARE](#)

Instructions

Within Bibliographic Records:

In Polaris Client: Place your cursor in the tag and the tag information will appear at the bottom of the record. **Note:** Tag information won't display when record is maximized.

In Leap: Click the check box next to a tag and click the *Edit tag* button.

In Connexion: In the variable fields, right click anywhere in a 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 Bibliographic Formats and Standards](#) or the [MARC21 for Bibliographic Records](#) website for more examples.

Edits to OCLC Records

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

SHARE local practice requires the use of ISBD punctuation in all records imported to Polaris. Examples in this document will include full ISBD punctuation. OCLC records may or may not include ISBD punctuation.

040:

- Add subfield b with *eng* if not present
- Add ‡e with *rda* when upgrading record to RDA
- ‡e comes before ‡c

Example: 040 __ IHI ‡b eng ‡e rda ‡c IHI

020:

- Record multiple ISBNs in separate 020 fields
- DO NOT enter any price information in the subfield c; this is obsolete. Remove if present
- Ensure qualifying information in ‡q is in parentheses

Examples:

020 __ 9780743524815 ‡q (paperback)

020 __ 9780743524815 ‡q (pbk.)

041: Language code(s)

- Verify 1st indicator and language codes
- Multiple codes in one subfield should be split into separate subfields
- Do not use field 041 to record the MARC language code if there is only one language associated with the item already recorded in the Fixed Field *lang*

Example: 041 1_ eng ‡a fre ‡a spa ‡h eng

082:

- Use field 082 with 2nd indicator 4
- For some juvenile works, LC copy has [E] or [Fic] instead of Dewey class number. Use field 082 for these designations, including the bracket
 - Examples:
082 04 [E]
082 04 [Fic]
- ‡2 is used to indicate the edition from which the DDC number was assigned. If using WebDewey, record the edition, language of the edition, and date the number was assigned in the format of YYYYMMDD. If using a printed copy of the DDC, record the edition, language of the edition, and the publication year.
 - From WebDewey:
082 0 4 792.8/2 ‡2 23/eng/20230402

- From Printed DDC:
082 0 4 792.8/2 ‡2 23/eng/2011

1XX:

- Authorized form of the creator name, as established in an authority record; may or may not be the same as on the item
 - 100 1 _ Poe, Edgar Allan, ‡d 1809-1849, ‡e author.
On title page: Edgar A. Poe
- May be personal name (100), family name (100), corporate body name (110), or conference/meeting name (111)
- If no authority record, format name as instructed in RDA toolkit
- Verify tag, form of name, and 1st indicator
- Add ‡e with appropriate relationship designator
 - 100 1 _ Bryson, Bill, ‡e compiler.
- Editors recorded in 1XX should be changed to 7XX
- Compilers recorded in 1XX should be changed to 7XX if appropriate. Some compilers may be considered creators
 - Note: if 1XX is changed to 7XX, also change 1st indicator from 1 to 0.
- If more than one author is listed, record the first in 1XX and the others in 7XX. This also applies to compilers who may be considered creators

245:

- Indicator 1
 - If 1XX field is present: 1
 - If no 1XX field is present: 0
 - Example:
100 1 _ Francis, Dick, ‡e author.
245 The edge / ‡c by Dick Francis.
▪ If no 1XX: 245 04 The edge
- Indicator 2: Options 0-9
 - Tells the system to ignore non-filing characters and initial articles when searching, including initial articles in non-English languages.
 - Includes the space between the article or character and the next word
 - 0 if there are no characters to be skipped
 - Note: Examples shown do not include statement of responsibility or any applicable 1XX field.
 - Examples:

245 10 April showers

245 04 The time of day

245 13 An alligator

245 04 Les poissons

245 08 The ... travel guide

- Transcribe title and statement of responsibility as they appear on the title page or title page substitute
- If title comes from any source other than the title page, include a 588 note with the source of the title
 - 245 10 Jackson family history / v‡c Amanda Jackson Barnham.
588 __ Title devised by cataloger.
- If no title is available from any source, cataloger devises title
- Take other title information (subtitle, parallel title, etc.) from the same source as the title proper
- ‡h not used in RDA; do not add to WorldCat records; delete if present
 - See below for SHARE local practice
- ‡c is for the statement of responsibility, which includes author(s), illustrator(s), editor(s), compiler(s), and translator(s)
 - In records for graphic novels, includes inker(s), letterer(s), colorer(s)
 - Do not include book designers or creators of cover illustrations
 - Example: 245 00 Roxy the ritzy camel / ‡c Anthony DeStafano ; illustrated by Richard Cowdrey.

246: Variant titles

- Add as applicable
- Do not record initial articles
- Do not add ending punctuation that is not part of the title
 - 245 10 Holidays : ‡b the complete guide to seasonal decorations.
246 30 Complete guide to seasonal decorations
- See BibFormats for all possible 1st and 2nd indicators
- Use subfield i when the text to be displayed when none of the other 2nd indicator display constants is adequate
 - 246 00 Live at Moers Festival / ‡c European Jazz Quintet
246 1 ‡i Additional title on container: ‡a Live at International New Jazz Festival

250: Edition statement

- Record edition statement as it appears on item
- Spell out abbreviated words as needed to match wording on the item
- Multiple edition statements may be in separate 250 fields, or in one 250, separated by a comma
 - 250 __ First HarperTrophy edition, revised edition.
or
250 __ First HarperTrophy edition.
250 __ Revised edition.
 - Note: See SHARE local practice below
- Add edition statement [With accompanying material] in records with 300 ‡e (accompanying material) to keep them from being incorrectly merged
- Add edition statement [Larger print edition] to records for larger print books to keep them from being incorrectly merged with true large print or regular print records
 - 250 __ [Larger print edition].

264:

- May have multiple 264s with indicators for different functions (production, publication, distribution, manufacture, copyright)
- 1st indicator: blank
- 2nd indicator: 0-4
- 264 for a Copyright Notice Date (2nd indicator 4) does not have ending punctuation
- Change MARC tag 260 to 264

Example:

264 _1 New York : ‡b Random House, ‡c [2013]

264 _4 ‡c ©2013

- ‡a: transcribe place of publication as it appears on the item
 - If place name is entered in brackets, do not abbreviate. Spell out if abbreviated in record
 - Example: 264 _1 [Chicago, Illinois]
Not: 264 _1 [Chicago, Ill.]
 - If a record has “[S.I.]” or “[Place of publication not identified]”, enter a place if possible, even if only a country. Enter in brackets
 - Note: Be sure to code the Ctry fixed field element accordingly
- ‡b: transcribe name of publisher as it appears on the item, including Inc., Ltd., etc.

- If publisher's name is shortened or truncated in the record, edit to match the item
 - Example: 264_1 ‡a New York : ‡b Alfred A Knopf, an imprint of Random House Children's Books, ‡c 2020.
- 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]”
- For self-published books, enter author's name in brackets as publisher if no publisher is clearly identified
 - Example: 264_1 ‡a [Ames, Iowa] : ‡b [Jane Smith], ‡c [2018?]
- ‡c: record publication date if present
 - If there is no publication date but there is a copyright date, enter copyright date in brackets as implied publication date
 - 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 they are a guess
 - Note: be sure to code the DtSt and Date fixed field elements accordingly.
 - Record copyright date in separate 264 with 2nd indicator 4
 - Record copyright symbol or the world copyright as stated on the item
 - Examples:

Publication date is present:
264_1 ‡c 2019.

Publication date is estimated, or is implied from copyright date:
264_1 ‡c [2019]

If publication date or range of dates is a guess, add a question mark:
264_1 ‡c [between 1900 and 1999?]

Not: ‡c [19--]
264_4 ‡c ©2019

300:

- Spell out abbreviations
 - Exception: Do not spell out “cm”—is considered a symbol, not an abbreviation
- For large print and larger print books, add “(large print)” after the page numbers in ‡a
- Change “[XX] pages” to “XX unnumbered pages,” or record as “1 volume (unpaged)”
- If resource has numerous sequences of paging, record as “1 volume (various pagings)”

- 300 field ends in a period only when 4XX field is present

Examples:

300 __ vi, 47 pages (large print) ; ‡c 24 cm + ‡e 1 hand puppet.
(4XX field is present)

300 __ 1 volume (unpaged) : ‡b color illustrations ; ‡c 18 cm

300 __ 30 unnumbered leaves : ‡b illustrations, portraits ; ‡c 30 cm

33X: 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 (i.e., book with CD)

For books:

336 __ text ‡b txt ‡2 rdacontent

337 __ unmediated ‡b n ‡2 rdamedia

338 __ volume ‡b nc ‡2 rdacarrier

340:

- Add ‡n with large print to records for large print and larger print materials
 - 340 __ ‡n large print ‡2 rdafs
- Add ‡n with jumbo braille if applicable
 - 340 __ ‡n jumbo braille ‡2 rdafs
- Add ‡l with spiral binding if resource is spiral bound
 - 340 __ ‡l spiral binding ‡2 rdatb
- Add ‡l with open ring binding or closed ring binding as applicable if resource is in a binder

341:

- Use to describe alternative modes of access to primary or secondary content
- 1st indicator: blank, 0, or 1
- 2nd indicator: Blank
- Do not use if there is no alternative mode of access, i.e., a book that is only braille, or only large print
- Use the following terms in ‡a:
 - Auditory; tactile; textual; visual
 - Example: 341 1 _ textual ‡e braille

- Use the following terms in \$b, \$c \$d or \$e as appropriate:
 - audio description; braille; captions; sign language; transcript
- Omit \$2 if term not taken from a controlled vocabulary

380: Form of work

- If present, do not delete
- If not present, do not need to add

490: Series statement

- Transcribe series statement as it appears on the resource
- 1st indicator: 0 if series is untraced. Check the authority file!
 - Traced series are sometimes incorrectly entered as untraced
- 1st indicator: 1 if series is traced. Field 800 or 830 must also be present with the authorized form of the series—may or may not be the same as the 490
- No ending punctuation in field 490; there is ending punctuation in 8XX fields
- Examples:

490 1_ Reading rainbow book
830 _0 Reading rainbow book.

or

490 1_ Animal Ark
800 1_ Baglio, Ben M. \$t Animal Ark.
- Some series-like statements are recorded as a quoted note in field 500 rather than 490/8XX. Check the authority file!
 - 500 __ “Sunrise books.”

500: Notes

- Include applicable notes. These examples are only some of the possibilities
- Check OCLC bib formats for indicators and subfields as applicable
- Use 532 note to describe accessibility features, hazards, and deficiencies of a resource
- Use 546 to record language of text if in more than one language, or if text is not in English. Also include 041 with language codes.
- Include page numbers of bibliography if contained in one section
- Use 588 Source of Description note if title comes from other than the preferred source of information
- Watch punctuation! Some notes have ending punctuation, and some do not. Check OCLC bib formats

Examples (add as applicable):

For board books:

500 __ On board pages.

If book has an index only:

500 __ Includes index.

If book has a bibliography:

504 __ Includes bibliographical references.

If book has both a bibliography and an index:

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.

532 0 _ Alternate pages of print and braille

588 0 _ Title from cover.

505:

- Add or enhance if needed to index titles of short stories, poems, etc.
- Include initial articles

Example: 505 00 ‡t The raven -- ‡t The pit and the pendulum.

6XX: Subject and genre headings

- Review to make sure they are appropriate
- Add as needed, especially genre headings and headings for fictitious characters
 - Note: Fictitious characters may be established in either a name authority record or a subject authority record. Verify in the authority file and code accordingly

Examples:

600 10 Duck, Donald ‡c (Fictitious character) ‡v Juvenile fiction.

650 _0 Haller, Mickey (Fictitious character) ‡v Fiction.

651 _0 Toronto (Kan.)

651 _0 Edinburgh (Scotland)

655 _7 Science fiction. ‡2 lcgft

655 _0 Young adult fiction.

655 _7 Graphic novels. ‡2 lcgft

7XX: 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
 - 700 1_ Bradlee, Frederic, ‡d 1920- ‡e editor.
 - 710 2_ Disney Art Studios (Firm), ‡e illustrator.
- 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). See local practice below
- If not present, add ‡e with relationship designator
- Do not include ‡e or ‡4 when ‡t is present
- Do not include initial articles in titles in ‡t
- Add ‡i with relationship information in author/title entries and entries for related works
- Add 730 for contents of resources with multiple titles, or works in multiple languages
 - 700 12 ‡i Container of (expression): ‡a Seuss, ‡c Dr. ‡t Cat in the hat. ‡l Italian.
 - 730 0_ ‡i Adaptation of (work): ‡a Tangled (Motion picture)

Fixed Fields:

- Converts to the 008 or LDR field when imported to Polaris
- Type: a (language material)
- ELvl: If upgrading a less than full level record, or if code i is present, change to blank
- Audn: Enter appropriate code
- 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 ₢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 1 if index is noted in MARC tag 500 or 504
- Desc: Will have code *i* for RDA when ISBD punctuation is included or code *c* for RDA when ISBD punctuation is omitted. If upgrading from pre-AACR punctuation, include ISBD punctuation and enter code *i*
- 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 if there is a single date in 264 ₢c; t if a publication date and copyright date are present in the 264 ₢c, even if they are the same
 - 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)
 - q for a range of dates
- Date One: Should agree with publication date in 264 _1 ₢c
- Date Two: Should agree with copyright date in 264 _4 ₢c or date of original in a note (for reprints or reproductions)

SHARE Local Edits

Local edits may be done in OCLC prior to exporting or in MarcReport or Polaris after exporting.

Do *not* permanently save local edits to the OCLC record.

Examples reflect display and spacing of subfields in Polaris.

SHARE cataloging local practices may be found on the SHARE Website: [Bibliographic & Cataloging Standards | SHARE](#)

Format Icons:

- Check or edit coding in the LDR, 006, and/or 007 to generate appropriate icon

ELvl Fixed Field:

- Always record as blank for full level

100:

- Change subfield 4 to subfield e with full relationship designator
 - ‡4 with code will not display in Polaris

245:

- If OCLC record is imported with title in all caps, edit to AACR formatting to distinguish from On Order records
 - Capitalize first word of title and any proper names; all other words are lower case
- Add ‡h with the General Material Designation (GMD) to all records for braille, large print, and larger print books
 - Use [text (large print)] for both large print and larger print
 - --Use braille for braille books
 - --Subfield h comes after ‡a, ‡n, and/or ‡p, but before ‡b
 - Examples:
245 04 ‡a The trees of North America. ‡p Pines and firs of Canada ‡h [text (large print)]
245 10 ‡a National Velvet ‡h [braille] :‡b a novel

250:

- Enter multiple edition statements in a single 250, separated by a comma
 - 250 __ ‡a First HarperTrophy edition, revised edition.
- See SHARE guidance on [differing editions](#) to see when paperbacks and hardbacks may be attached to the same record

264:

- Add copyright date when available in a 264 _4 ‡c

Example:

264 _1 ‡a New York :‡b Random House,‡c [2013]

264 _4 ‡c©2013

6XX:

- For juvenile material, use the adult subject heading with a juvenile subdivision as appropriate
- Delete or edit juvenile subject headings coded as 650 2nd indicator 1, unless there is no equivalent adult subject heading. In this case, the record should have both the adult and juvenile subject headings
- Add genre headings, form headings, or approved local subject headings as appropriate. See SHARE cataloging standards for [a list of approved local subject headings](#)
- Always add the appropriate genre/form heading for large print books, larger print books, board books, and graphic novels

Examples:

650 _0 ‡a Dogs ‡v Juvenile fiction.

Not: 650 _1 ‡aDogs‡vFiction.

But:

650 _0 ‡a Infants ‡v Juvenile fiction.

And: 650 _1 ‡a Babies ‡v Fiction. (Babies is not an adult-level subject heading)

For large print and larger print books, add:

655 _7 ‡a Large print books.‡2lcgft

For board books, add:

655 _7 ‡aBoard books.‡2lcgft

For graphic novels, add:

655 _7 ‡aGraphic novels.‡2lcgft

655 _7 ‡aComics (Graphic works)‡2lcgft

7XX:

- Change subfield 4 to subfield e with full relationship designator
 - ‡4 with code will not display in Polaris