



Editing Checklist—Books

As of: Aug. 2023

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

RDA Toolkit (subscription required): original.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 (BFAS): <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 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 the field, and click *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 (WorldCat) records

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>--ISBD punctuation: Do not add to WorldCat records if the punctuation is omitted unless you are upgrading a record from pre-AACR punctuation</p> <p>Note: SHARE local practice requires the use of ISBD punctuation in records imported into Polaris</p> <p>--Examples in this document include full ISBD punctuation</p>	
040	<p>--Add #b with <i>eng</i> if not present</p> <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>--Do not include price information in subfield c. This is only for “terms of availability.”</p> <p>--Record qualifying information in #q, in parenthesis</p>	<p>020 _ _ 9780743524815 #q (pbk.)</p> <p>020 _ _ 9780743524815 #q (paperback)</p>
041	<p>--Language code(s) of contents as recorded in MARC tag 546</p> <p>--Verify 1st indicator and language codes</p> <p>--Multiple codes in one subfield should be split into separate subfields</p> <p>--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 <i>Lang</i>.</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>--Add #e with appropriate relationship designator</p> <p>--Editors recorded in 1XX should be changed to 7XX</p>	<p>100 1 _ Poe, Edgar Allan, #d 1809-1849, #e author. On title page: Edgar A. Poe</p> <p>100 1 _ Bryson, Bill, #e compiler.</p>

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	<p>--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 245 1st indicator from 1 to 0.</p> <p>--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</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. 245 14 The edge / #c by Dick Francis.</p> <p>If no 1XX: 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 non-English languages. Includes the space between the article or character and the next word</p> <p>--0 if there are no characters to be skipped</p> <p>Note: Examples shown do not include statement of responsibility or any applicable 1XX field.</p>	<p>245 10 April showers 245 04 The time of day 245 13 An alligator 245 04 Les poissons 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 any source other than the title page, include a 588 note with the source of the title</p> <p>--If no title is available from any source, cataloger devises title</p> <p>--Take other title information (subtitle, parallel title, etc.) from the same source as the title proper</p>	<p>245 10 Jackson family history / #c Amanda Jackson Barnham. 588 __ Title devised by cataloger.</p>
245 #h	<p>--Not used in RDA</p> <p>--Do not add to WorldCat records; delete if present</p> <p>--See below for SHARE local practice</p>	
245 #c	<p>--Statement of responsibility includes author(s), illustrator(s), editor(s), compiler(s), translator(s)</p> <p>--In records for graphic novels, includes inker(s), letterer(s), colorer(s)</p> <p>--Do not include book designers or creators of cover illustrations</p>	<p>245 00 Roxy the ritzy camel / #c Anthony DeStafano ; illustrated by Richard Cowdrey.</p>

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246	<ul style="list-style-type: none"> --Add variant titles as applicable --Do not record initial articles --Do not add ending punctuation that is not part of title --See BFAS for 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. See Bib Formats and Standards for additional information. 	<p>245 10 Holidays : #b the complete guide to seasonal decorations.</p> <p>246 30 Complete guide to seasonal decorations</p> <p>246 00 Live at Moers Festival / #c European Jazz Quintet</p> <p>246 1 #i Additional title on container: #a Live at International New Jazz Festival</p>
250	<ul style="list-style-type: none"> --Record edition statement as it appears on the 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 --Add edition statement [<i>With accompanying material</i>] in records with 300 #e (accompanying material) to keep them from being incorrectly merged --Add edition statement [<i>Larger print edition</i>] to records for larger print books to keep them from being incorrectly merged 	<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	<ul style="list-style-type: none"> --May have multiple 264s with indicators for different functions (production, publication, distribution, manufacture, copyright) --1st indicator: blank --2nd indicator: 0-4 --264 for a <i>Copyright Notice Date</i> (2nd indicator 4) does not have ending punctuation --Change MARC tag 260 to 264 	<p>264 _1 New York : #b Random House, #c [2013]</p> <p>264 _4 #c ©2013</p>
264 #a	<ul style="list-style-type: none"> --Transcribe place of publication as it appears on the item --If a place name is entered in brackets, do not abbreviate. Spell out if abbreviated in the record --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. 	<p>264 _1 [Chicago, Illinois]</p> <p>Not: 264 _1 [Chicago, Ill.]</p>
264 #b	<ul style="list-style-type: none"> --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 	<p>264 _1 #a New York : #b Alfred A Knopf, an imprint of Random House Children's Books, #c 2020.</p>

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	<p>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>--For self-published books, enter author’s name in brackets as publisher if no publisher is clearly identified</p>	<p>264 _1 #a [Ames, Iowa] : #b [Jane Smith], #c [2018?]</p>
264 #c	<p>--Record publication date if present</p> <p>--If there is no publication date but there is a copyright date, enter copyright date in brackets as implied publication date</p> <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>Note: Be sure to code the DtSt and Date fixed field elements accordingly.</p> <p>--Record copyright date in separate 264 with 2nd indicator 4</p> <p>--Record copyright symbol or the word copyright as stated on the item</p>	<p>Publication date is present: 264 _1 #c 2019.</p> <p>Publication date is estimated, or is implied from copyright date: 264 _1 #c [2019]</p> <p>If publication date or range of dates is a guess, add a question mark: 264 _1 #c [between 1900 and 1999?] Not: #c [19--]</p> <p>264 _4 #c ©2019</p>
300	<p>--Spell out abbreviations. Exception: Do not spell out “cm”—is considered a symbol, not an abbreviation</p> <p>--For large print and larger print books, add “(large print)” after the page numbers in #a</p> <p>--Change “[XX] pages” to “XX unnumbered pages,” or record as “1 volume (unpaged)”</p> <p>--If resource has numerous sequences of paging, record as “1 volume (various pagings)”</p> <p>--300 field ends in a period only when 4XX field is present</p>	<p>300 __ vi, 47 pages (large print) ; #c 24 cm + #e 1 hand puppet. (4XX field is present)</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 (i.e., book with CD)</p>	<p>For books: 336 __ text #b txt #2 rdacontent 337 __ unmediated #b n #2 rdamedia 338 __ volume #b nc #2 rdacarrier</p>
340	--Add #n with <i>large print</i> to records for large print and larger	340 __ #n large print #2 rdafs

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	<p>print materials</p> <p>--Add #n with <i>jumbo braille</i> if applicable</p> <p>--Add #l with <i>spiral binding</i> if resource is spiral bound</p> <p>--Add #l with <i>open ring binding</i> or <i>closed ring binding</i> as applicable if resource is in a binder</p>	<p>340 _ _ #n jumbo braille #2 rdafs</p> <p>340 _ _ #l spiral binding #2 rdatb</p>
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> <p>---auditory</p> <p>---tactile</p> <p>---textual</p> <p>---visual</p> <p>--Use the following terms in #b, #c #d or #e as appropriate:</p> <p>---audio description</p> <p>---braille</p> <p>---captions</p> <p>---sign language</p> <p>---transcript</p> <p>--Omit #2</p>	<p>341 1 _ textual #e braille</p>
380	<p>--Describes form of work. If present, do not delete</p> <p>--If not present, do not need to add</p>	
490	<p>--Series statement as it appears on the resource</p> <p>--1st indicator: 0 if series is untraced. Check the authority file!</p> <p>Traced series are sometimes incorrectly entered as untraced</p> <p>--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</p> <p>--No ending punctuation in field 490; there is ending punctuation in 8XX fields</p> <p>--Some series-like statements are recorded as a quoted note in field</p>	<p>490 1 _ Reading rainbow book</p> <p>830 _ 0 Reading rainbow book.</p> <p>490 1 _ Animal Ark</p> <p>800 1 _ Baglio, Ben M. #t Animal Ark.</p> <p>500 _ _ “Sunrise books.”</p>

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	500 rather than 490/8XX. Check the authority file!	
5XX	<p>--Include applicable notes. These examples are only some of the possibilities</p> <p>--Check OCLC bib formats for indicators and subfields as applicable</p> <p>--Use 532 note to describe accessibility features, hazards, and deficiencies of a resource</p> <p>--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.</p> <p>--Include page numbers of bibliography if contained in one section</p> <p>--Use 588 Source of Description note if title comes from other than the preferred source of information</p> <p>--Watch punctuation! Some notes have ending punctuation, and some do not. Check OCLC bib formats</p>	<p>For board books: 500 __ On board pages.</p> <p>If book has an index only: 500 __ Includes index.</p> <p>If book has a bibliography: 504 __ Includes bibliographical references.</p> <p>If book has both a bibliography and an index: 504 __ Includes bibliographical references (pages 34-37) and index.</p> <p>520 __ Sally is nervous and excited—it's the first day of school!</p> <p>521 1_ 008-012.</p> <p>532 0_ Alternate pages of print and braille</p> <p>588 0_ Title from cover.</p>
505	<p>--Add or enhance if needed to index titles of short stories, poems, etc.</p> <p>--Include initial articles</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</p> <p>--Add subject headings as needed, especially genre headings and headings for fictitious characters</p> <p>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.</p>	<p>650 _0 Tap dancing.</p> <p>600 10 Duck, Donald #c (Fictitious character) #v Juvenile fiction.</p> <p>650 _0 Haller, Mickey (Fictitious character) #v Fiction.</p> <p>651 _0 Toronto (Kan.)</p> <p>651 _0 Edinburgh (Scotland)</p> <p>655 _7 Science fiction. #2 lcgft</p> <p>655 _0 Young adult fiction.</p> <p>655 _7 Graphic novels. #2 lcgft</p>
7XX	--Added entries—names and/or related works	<p>700 1_ Bradlee, Frederic, #d 1920- #e editor.</p>

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<ul style="list-style-type: none"> --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). 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 	<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 and LDR fields 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, or if code l is present, change to blank .
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

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Desc	Will have code i for RDA when ISBD punctuation is included or code c for RDA when ISBD punctuation is omitted. If upgrading a record from pre-AACR punctuation, 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 for a single date in 264 _1, ≠c t if there is a publication date and copyright date in 264 _1 and 264 _4, 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

May be done in OCLC prior to exporting or in Polaris after record has been brought in.

Do not save local edits to OCLC records.

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	--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	
ELvL fixed field element	--Code as blank	
ISBD punctuation	--Include applicable ISBD punctuation between subfields and at the end of fields --Enter code i in the <i>Descriptive cataloging form</i> element in the LDR field	

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1XX	--See SHARE 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 formatting to distinguish from on-order records : Capitalize first word of title and any proper names; all other words are lower case	
245 #h	--Add a General Material Designation (GMD) to all records for braille, large print, and larger print books --Use <i>[text (large print)]</i> for both large print and larger print --Use <i>braille</i> for braille books --Subfield h comes after #a, #n, and/or #p, but before #b	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 --See SHARE local practice on entering edition statements when paperbacks and hardbacks may be attached to the same record	250 __ #a First HarperTrophy edition, revised edition.
264	--If publication date is present, copyright date does not need to be added unless it is different than publication date --Enter fixed field element DtSt (Type of date) as s --Enter publication date in Date 1 --If copyright date is used as implied publication date, add 264 _4 #c with copyright date --If copyright date is different than publication date, add 264 _4 #c with copyright date --Code fixed field element DtSt as t --Enter publication date in Date 1 and copyright date in Date 2	264 _1 #a New York :#b Random House, #c 2013. 264 _1 #a New York :#b Random House, #c [2013] 264 _4 #c ©2013 264 _1 #a New York :#b Random House, #c 2013. 264 _4 #c ©2011
490/8XX	--See SHARE local practice on creation of local series authority records for items that are part of a series but there is no series authority record in OCLC	
5XX	--See SHARE local practice on contents notes , summary notes , reading program information , etc.	
6XX	--See SHARE local practice on which subject headings are retained or deleted , use of genre headings , approved local	650 _0 #a Dogs #v Juvenile fiction. Not: 650 _1#a Dogs #v Fiction.

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	<p>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, board books, and graphic novels</p>	<p><i>But:</i></p> <p>650 _0 #aInfants#vJuvenile fiction. And: 650 _1 #aBabies#vFiction. (Babies is not an adult-level subject heading)</p> <p>For large print and larger print books, add: 655 _7 #aLarge print books.#2lcgft</p> <p>For board books, add: 655 _7 #aBoard books.#2lcgft</p> <p>For graphic novels, add: 655 _7 #aGraphic novels.#2lcgft 655 _7 #aComics (Graphic works)#2lcgft</p>
7XX	--See SHARE local practice on use of relationship designators	700 1_ #aNiles, Ben,#eillustrator.