

As of: Sept. 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 <u>Cataloging>Policies and Procedures</u>

#### 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.

#### 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.

Field	Action	Example
General	ISBD punctuation: Do not add to WorldCat records if the punctuation is omitted unless you are upgrading a record from pre-	
	AACR punctuation <b>Note</b> : SHARE local practice requires the use of ISBD punctuation in records imported into Polaris	
	Examples in this document include full ISBD punctuation	
040	<ul> <li>Add \$\pm b\$ with eng if not present</li> <li>Add \$\pm e\$ with rda when upgrading record to RDA</li> <li>\$\pm e\$ comes before \$\pm c\$</li> </ul>	<b>040</b> IEU <b>‡b</b> eng <b>‡e</b> rda <b>‡c</b> IEU
020	<ul> <li>Record multiple ISBNs in separate 020 fields</li> <li>Do not include price information in subfield c. This is only for "<u>terms</u> of availability."</li> <li>Record qualifying information in ‡q, in parenthesis</li> </ul>	<b>020</b> 9780743524815 <b>≠q</b> (pbk.) <b>020</b> 9780743524815 <b>≠q</b> (paperback)
041	Language code(s) of contents as recorded in MARC tag 546 Verify 1 <sup>st</sup> indicator and language codes Multiple codes in one subfield should be split into separate subfields Do <b>NOT</b> 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> .	<b>041 1 _ eng ‡a</b> fre <b>‡a</b> spa <b>‡h</b> eng
082	The Dewey Decimal call number taken from the Dewey Decimal Classification, accessed through the electronic or printed version. Use field 082 with 2 <sup>nd</sup> indicator 4.	082 0 4 [E] 082 0 4 [Fic]
	For some juvenile works, LC copy has [E] or [Fic] instead of Dewey class number. Use field 082 for these designations, including the bracket.	From WebDewey: 082 0 4 792.8/2 ‡2 23/eng/20230402
	+2 is used to indicate the edition from which the DDC number was assigned. If using WebDewey, record the edition, language of the	From Printed DDC: 082 0 4 792.8/2 ‡2 23/eng/2011

Variable Fields

	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.	
1XX	Authorized form of creator name, as established in an authority	<b>100 1</b> _ Poe, Edgar Allan, <b>‡d</b> 1809-1849, <b>‡e</b>
	record; may not be the same as on the item	author.
	May be personal name (100), family name (100), corporate body	On title page: Edgar A. Poe
	name (110), or conference/meeting name (111)	
	If no authority record, format name as instructed in RDA Toolkit	<b>100 1</b> Bryson, Bill, <b>‡e</b> compiler.
	Verify tag, form of name, and 1 <sup>st</sup> indicator	
	Add +e with appropriate relationship designator	
	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	
	<b>Note:</b> If 1XX is changed to 7XX, also change 245 1 <sup>st</sup> 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	If 1XX field is present: 1	<b>100 1</b> _ Francis, Dick, <b>‡e</b> author.
Ind 1		<b>245 14</b> The edge / <b>‡c</b> by Dick Francis.
	If no 1XX field: 0	
		If no 1XX:
		245 04 The edge
245	0-9	245 10 April showers
Ind 2	Tells the system to ignore non-filing characters and initial articles	245 04 The time of day
	when searching, including initial articles in non-English languages.	245 13 An alligator
	Includes the space between the article or character and the next	245 04 Les poissons
	word	245 08 The travel guide
	0 if there are no characters to be skipped	
	<b>Note:</b> Examples shown do not include statement of responsibility or	
045	any applicable 1XX field.	<b>DAE 40.</b> In also an family bists my /
245	Transcribe title and statement of responsibility as they appear on the	245 10 Jackson family history /
	title page or title page substitute	<b>+c</b> Amanda Jackson Barnham.
	If title comes from any source other than the title page, include a	<b>588</b> Title devised by cataloger.

	588 note with the source of the title	
	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	
245	Not used in RDA	
‡h	Do not add to WorldCat records; delete if present	
	See below for SHARE local practice	
245	Statement of responsibility includes author(s), illustrator(s), editor(s),	<b>245 00</b> Roxy the ritzy camel / <b>‡c</b> Anthony
‡c	compiler(s), translator(s)	DeStafano ; illustrated by Richard Cowdrey.
	In records for graphic novels, includes inker(s), letterer(s), colorer(s)	
	Do not include book designers or creators of cover illustrations	
246	Add variant titles as applicable	<b>245 10</b> Holidays : <b>+b</b> the complete guide to
	Do not record initial articles	seasonal decorations.
	Do not add ending punctuation that is not part of title	<b>246 30</b> Complete guide to seasonal decorations
	See BFAS for possible 1st and 2nd indicators	
	use subfield i when the text to be displayed when none of the other	<b>246 00</b> Live at Moers Festival / <b>‡c</b> European Jazz
	2 <sup>nd</sup> indicator display constants is adequate. See <u>Bib Formats and</u>	Quintet
	Standards for additional information.	<b>246 1 +i</b> Additional title on container: <b>+a</b> Live at
		International New Jazz Festival
250	Record edition statement as it appears on the item	<b>250</b> _ First HarperTrophy edition, revised
	Spell out abbreviated words as needed to match wording on the	edition.
	item	or
	Multiple edition statements may be in separate 250 fields, or in one	<b>250</b> First HarperTrophy edition.
	250, separated by a comma	<b>250</b> Revised edition.
	Add edition statement [With accompanying material] in records with	
	$300 \neq e$ (accompanying material) to keep them from being incorrectly	<b>250</b> [Larger print edition].
	merged	
	Add edition statement [Larger print edition] to records for larger print	<b>250</b> Revised edition, [With accompanying
	books to keep them from being incorrectly merged	material].
264	May have multiple 264s with indicators for different functions	<b>264</b> <u>1</u> New York : <b>+b</b> Random House, <b>+c</b> [2013]
204	(production, publication, distribution, manufacture, copyright)	<b>264</b> $4 \neq c$ ©2013
	1st indicator: blank	
	2nd indicator: 0-4	
	264 for a <i>Copyright Notice Date</i> (2 <sup>nd</sup> indicator 4) does not have	

	ending punctuation	
	Change MARC tag 260 to 264	
264 ‡a	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	264 _1 [Chicago, Illinois] Not: 264 _1 [Chicago, III.]
	<ul> <li>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</li> <li>Note: Be sure to code the Ctry fixed field element accordingly.</li> </ul>	
264	Transcribe name of publisher as it appears on the item, including	<b>264</b> _ <b>1 ‡a</b> New York : <b>‡b</b> Alfred A Knopf, an
‡b	Inc., Ltd, etc. If publisher's name is shortened or truncated in the record, edit to match the item	imprint of Random House Children's Books, <b>‡c</b> 2020.
	<ul> <li>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]"</li> <li>For self-published books, enter author's name in brackets as</li> </ul>	<b>264 _1 ≠a</b> [Ames, Iowa] : <b>≠b</b> [Jane Smith], <b>≠c</b> [2018?]
	publisher if no publisher is clearly identified	
264	Record publication date if present	Publication date is present:
‡c	If there is no publication date but there is a copyright date, enter copyright date in brackets as implied publication date	<b>264 _1 ≠c</b> 2019.
	If a publication date is entered with dashes, or if the record has "[date of publication not identified]", change to an estimated date or	Publication date is estimated, or is implied from copyright date:
	range of dates, in brackets. Include a question mark after the date(s) if date(s) are a guess	<b>264_1 = c</b> [2019]
	<b>Note</b> : Be sure to code the DtSt and Date fixed field elements accordingly.	If publication date or range of dates is a guess, add a guestion mark:
	Record copyright date in separate 264 with 2 <sup>nd</sup> indicator 4	<b>264 _1 =c</b> [between 1900 and 1999?]
	Record copyright symbol or the word copyright as stated on the item	Not: <b>+c</b> [19]
		<b>264_4 +c</b> ©2019
300	Spell out abbreviations. Exception: Do not spell out "cm"—is considered a symbol, not an abbreviation	<b>300</b> vi, 47 pages (large print) ; <b>‡c</b> 24 cm + <b>‡e</b> 1 hand puppet.
	For large print and larger print books, add "(large print)" after the page numbers in ‡a	(4XX field is present)

	<ul> <li>Change "[XX] pages" to "XX unnumbered pages," or record as "1 volume (unpaged)"</li> <li>If resource has numerous sequences of paging, record as "1 volume (various pagings)"</li> <li>300 field ends in a period only when 4XX field is present</li> </ul>	<ul> <li>300 _ 1 volume (unpaged) : <b>#b</b> color illustrations ; <b>#c</b>18 cm</li> <li>300 _ 30 unnumbered leaves : <b>#b</b> illustrations, portraits ; <b>#c</b> 30 cm</li> </ul>
33X	<ul> <li>336, 337, and 338 describe content, media, and carrier type</li> <li>Use OCLC macro to add if needed; otherwise, verify information is correct</li> <li>Records describing more than one format of material should have appropriate 33X fields for each format (i.e., book with CD)</li> </ul>	For books: 336 text <b>+b</b> txt <b>+2</b> rdacontent 337 unmediated <b>+b</b> n <b>+2</b> rdamedia 338 volume <b>+b</b> nc <b>+2</b> rdacarrier
340	<ul> <li>Add ‡n with <i>large print</i> to records for large print and larger print materials</li> <li>Add ‡n with <i>jumbo braille</i> if applicable</li> <li>Add ‡l with <i>spiral binding</i> if resource is spiral bound</li> <li>Add ‡l with <i>open ring binding</i> or <i>closed ring binding</i> as applicable if resource is in a binder</li> </ul>	<ul> <li>340 +n large print +2 rdafs</li> <li>340 +n jumbo braille +2 rdafs</li> <li>340 +I spiral binding +2 rdatb</li> </ul>
341	<ul> <li>Use to describe alternative modes of access to primary or secondary content</li> <li>1st indicator: blank, 0, or 1</li> <li>2nd indicator: Blank</li> <li>Do not use if there is no alternative mode of access, i.e, a book that is only braille, or only large print</li> <li>Use the following terms in ‡a:</li> <li>auditory</li> <li>tactile</li> <li>textual</li> <li>visual</li> <li>Use the following terms in ‡b, ‡c ‡d or ‡e as appropriate:</li> <li>audio description</li> <li>braille</li> <li>captions</li> <li>sign language</li> <li>transcript</li> <li>Omit ‡2</li> </ul>	341 1 _ textual <b>‡e</b> braille

380	Describes form of work. If present, do not delete If not present, do not need to add	
490	Series statement as it appears on the resource 1 <sup>st</sup> indicator: 0 if series is untraced. Check the authority file! Traced series are sometimes incorrectly entered as untraced 1 <sup>st</sup> indicator: 1 if series is traced. Field 800 or 830 must also	<b>490 1_</b> Reading rainbow book <b>830 _0</b> Reading rainbow book.
	be present with the authorized form of the series—may or may not be the same as the 490	<b>490 1_</b> Animal Ark <b>800 1_</b> Baglio, Ben M. <b>≠t</b> Animal Ark.
	<ul> <li>No ending punctuation in field 490; there is ending punctuation in 8XX fields</li> <li>Some series-like statements are recorded as a quoted note in field 500 rather than 490/8XX. Check the authority file!</li> </ul>	<b>500</b> "Sunrise books."
5XX	Include applicable notes. These examples are only some of the possibilities	For board books: 500 On board pages.
	Check OCLC bib formats for indicators and subfields as applicable	If book has an index only: 500 Includes index.
	Use 532 note to describe accessibility features, hazards, and deficiencies of a resource	If book has a bibliography: 504 Includes bibliographical references. If book has both a bibliography and an index:
	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.	<b>504</b> Includes bibliographical references (pages 34-37) and index.
	Include page numbers of bibliography if contained in one section	<b>520</b> Sally is nervous and excited—it's the first
	Use 588 Source of Description note if title comes from other than the preferred source of information	day of school! <b>521 1_</b> 008-012. <b>532 0 _</b> Alternate pages of print and braille
	Watch punctuation! Some notes have ending punctuation, and some do not. Check OCLC bib formats	588 0 _ Title from cover.
505	Add or enhance if needed to index titles of short stories, poems, etc. Include initial articles	<b>505 00 +t</b> The raven <b>+t</b> The pit and the pendulum.
6XX	Review subject headings to make sure they are appropriate	650 _0 Tap dancing.

	<ul> <li>Add subject headings as needed, especially genre headings and headings for fictitious characters</li> <li>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.</li> </ul>	<ul> <li>600 10 Duck, Donald ‡c (Fictitious character) ‡v Juvenile fiction.</li> <li>650 _0 Haller, Mickey (Fictitious character) ‡v Fiction.</li> <li>651 _0 Toronto (Kan.)</li> <li>651 _0 Edinburgh (Scotland)</li> <li>655 _7 Science fiction. ‡2 lcgft</li> <li>655 _0 Young adult fiction.</li> <li>655 _7 Graphic novels. ‡2 lcgft</li> </ul>
7XX	<ul> <li>Added entries—names and/or related works</li> <li>May be a personal name (700), family name (700), corporate body name (710), or conference/meeting name (711)</li> <li>Enter name(s) as established in an authority record; may not be the same as on the item</li> <li>Verify form of name and 1<sup>st</sup> indicator</li> <li>If no authority record, format name as instructed in RDA Toolkit</li> <li>Relationship designator may be present either in ‡e (relator term) or ‡4 (relator code). See local practice below</li> <li>If not present, add ‡e with relationship designator</li> <li>Do not include ‡e or ‡4 when ‡t is present</li> <li>Do not include initial articles in titles in ‡t</li> <li>Add ‡i with relationship information in author/title entries and entries for related works</li> <li>Add 730 for contents of resources with multiple titles, or works in multiple languages</li> </ul>	<ul> <li>700 1_ Bradlee, Frederic, #d 1920- #e editor.</li> <li>710 2_ Disney Art Studios (Firm), #e illustrator.</li> <li>700 12 #i Container of (expression): #a Seuss, #c Dr. #t Cat in the hat.</li> <li>#I Italian.</li> <li>730 0_ #i Adaptation of (work):</li> <li>#a Tangled (Motion picture)</li> </ul>

#### **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.

Туре	a (language material)
ELvl	If upgrading a less-than-full-level record, or if code I is present, change to <b>blank.</b>
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 <b>d</b> if the item is large print or larger print	
Conf	Code as appropriate. <b>0</b> if item is not a conference publication; <b>1</b> 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>b</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 <b>1</b> if index is noted in MARC tag 500 or 504	
Desc	Will have code <b>i</b> for RDA when ISBD punctuation is included or code <b>c</b> 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. <b>0</b> if item is not a festschrift; <b>1</b> if item is a festschrift	
DtSt	<b>s</b> 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	
	<b>r</b> if item is a reprint. Enter publication date in Date 1. Enter date of original in Date 2 (may be found in a	
	note)	
	<b>q</b> 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 <u>Cataloging>Policies and Procedures</u>.

Field	Action	Example
Format	Make sure applicable fields are coded correctly to facilitate	
icons	searching and to generate the correct format icon in the	
	PAC.	

	<ul> <li>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</li> <li>See Polaris Help on <i>Type of Material Codes (TOMs)</i> for correct coding</li> </ul>	
ELvL fixed field element	Code as <b>blank</b>	
ISBD punctuation	<ul> <li>Include applicable ISBD punctuation between subfields and at the end of fields</li> <li>Enter code i in the <i>Descriptive cataloging form</i> element in the LDR field</li> </ul>	
1XX	See SHARE local practice on <u>use of relationship designators</u>	<b>100 1_ ‡a</b> Sendak, Maurice, <b>‡e</b> author, <b>‡e</b> illustrator.
245	If OCLC record is imported with title in all caps, edit formatting to distinguish from <u>on-order records</u> : Capitalize first word of title and any proper names; all other words are lower case	
245 ‡h	<ul> <li>Add a <u>General Material Designation (GMD)</u> to all records for braille, large print, and larger print books</li> <li>Use <i>[text (large print)]</i> for both large print and larger print</li> <li>Use <i>braille</i> for braille books</li> <li>Subfield h comes after ‡a, ‡n, and/or ‡p, but before ‡b</li> </ul>	<ul> <li>245 04 ‡aThe trees of North America.‡pPines and firs of Canada‡h[text (large print)]</li> <li>245 10 ‡aNational Velvet‡h[braille] :‡ba novel</li> </ul>
250	<ul> <li>Enter multiple edition statements in a single 250, separated by a comma</li> <li>See SHARE local practice on <u>entering edition statements</u> when paperbacks and hardbacks may be attached to the same record</li> </ul>	<b>250‡a</b> First HarperTrophy edition, revised edition.
264	<ul> <li>If publication date is present, copyright date does not need to be added unless it is different than publication date</li> <li>Enter fixed field element DtSt (Type of date) as s</li> <li>Enter publication date in Date 1</li> <li>If copyright date is used as implied publication date, add</li> </ul>	<ul> <li>264 _1 = aNew York := bRandom House,= c2013.</li> <li>264 _1 = aNew York := bRandom House,= c[2013]</li> </ul>

490/8XX	<ul> <li>264 _4 ‡c with copyright date</li> <li>If copyright date is different than publication date, add 264 _4 ‡c with copyright date</li> <li>Code fixed field element DtSt as t</li> <li>Enter publication date in Date 1 and copyright date in Date 2</li> <li>See SHARE local practice on creation of local series</li> </ul>	<b>264 _4 ‡c</b> ©2013 <b>264 _1 ‡a</b> New York : <b>‡b</b> Random House, <b>‡c</b> 2013. <b>264 _4 ‡c</b> ©2011
100,070	<u>authority records</u> for items that are part of a series but there is no series authority record in OCLC	
5XX	See SHARE local practice on <u>contents notes</u> , <u>summary</u> <u>notes</u> , <u>reading program information</u> , etc.	
6XX	<ul> <li>See SHARE local practice on which <u>subject headings are</u><u>retained or deleted</u>, use of <u>genre headings</u>, <u>approved local</u> <u>subject headings</u>, etc.</li> <li>For juvenile material, use the adult subject heading with a juvenile subdivision as appropriate</li> <li>Delete or edit juvenile subject headings coded as 650 2<sup>nd</sup> ind 1, <b>unless</b> there is no equivalent adult subject heading. In this case, the record should have both the adult and juvenile subject headings</li> <li>Add genre headings, form headings, or approved local subject headings as appropriate. See SHARE cataloging standards for a list of <u>approved local subject headings</u></li> <li>Always add the appropriate genre/form heading for large print books, larger print books, board books, and graphic</li> </ul>	<ul> <li>650 _0 ‡aDogs‡vJuvenile fiction.</li> <li>Not: 650 _1‡aDogs‡vFiction.</li> <li>But:</li> <li>650 _0 ‡aInfants‡vJuvenile fiction.</li> <li>And: 650 _1 ‡aBabies‡vFiction.</li> <li>(Babies is not an adult-level subject heading)</li> <li>For large print and larger print books, add:</li> <li>655 _7 ‡aLarge print books.‡2lcgft</li> <li>For board books, add:</li> <li>655 _7 ‡aBoard books.‡2lcgft</li> <li>For graphic novels, add:</li> <li>655 _7 ‡aGraphic novels.‡2lcgft</li> </ul>
7XX	novels        See SHARE local practice on use of relationship designators	655_7 ‡aComics (Graphic works)‡2lcgft 700 1_ ‡aNiles, Ben,‡eillustrator.