NC CARDINAL CATALOGING BEST PRACTICES AND PROCEDURES

Version 3

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Document Overview
This document outlines and provides best practices for cataloging within NC Cardinal. All policies and procedures are recommended and should be implemented throughout the consortium. As cataloging issues and new topics arise, this document will be amended. If you have any questions, please contact the State Library or one of the current NC Cardinal Cataloging Committee members.
Cataloging Etiquette
Joining a consortium of libraries affects how catalogers accomplish their job. As a Cataloger, you are no longer creating records for your own library; you are creating records for all libraries within the consortium as everyone shares the same MARC (title) record. For example, what is entered into the 245 tag is displayed to all patrons across all libraries who use an NC Cardinal library. A set of cataloging etiquette is recommended.

Do:
1. Add information to an existing record if it is incomplete or brief. This includes on-order records.
2. Correct typographical errors or misspellings when you see them.
3. Use the MARC record templates as defined in NC Cardinal for importing cataloging records or creating original cataloging.
4. Refer to this guide for cataloging procedures and practices.
5. Follow RDA rules as indicated in the NC Cardinal MARC Templates document.
6. Delete your local empty bib records.

Do not:
1. Delete other libraries’ bib record(s) unless they are empty, created more than 2 months ago, and not an electronic resource record.
2. Delete OCLC numbers from a record. (035 tag)
3. Change the title of a periodical by adding a year or issue designation if it is not currently in the record.
4. Delete or edit the 082 tag (recommended Dewey)

If you are unsure about specific MARC record and what something means within the MARC record, contact the library that created the record or made the last update. The list of primary cataloging contacts is on The Nest (http://statelibrary.ncdcr.libguides.com/thenest/).

Record and Cataloging Structure
There are three (3) levels of catalog records within NC Cardinal – bibliographic, volume, and item records. Bibliographic records are called “title” records within Evergreen; volume records are “call number” records; and item records relate to a “copy” record which usually has an assigned barcode. The following screenshot illustrates the difference between the
different record types:

To catalog an item, a TITLE record must exist within the catalog. Once a title record exists, a volume record is created for each library using the appropriate local call number. The item record is then attached to the call number record and identifies the barcode associated with the call number record.

**Adding Title (MARC) and Holding Records**

There are three primary sources for MARC records within NC Cardinal:

1. OCLC
2. Z39.50 sources
3. Vendor files

For MARC (title) records, you should begin with OCLC if you have access. Otherwise use one of the vetted z39.50 sources within Evergreen. Vendor files vary in terms of quality.

General Steps:
1. Search the NC Cardinal Catalog for existing title records.
2. If a TITLE record does not exist, use OCLC or z39.50 screen to import a title record.
3. If a TITLE record exists, do not add or import a new or additional record. If the existing TITLE record does not meet the standards as outlined in the NC Cardinal Item Templates document, overlay or edit the existing record to bring it up to the minimum standards recommended.
4. Add your volume record.
5. Add your item record(s) to the existing title record.
Step 1: Searching the Catalog
You can select or limit catalog searches by

- **Keyword**—finds the terms you enter anywhere in the entire record for an item, including title, author, subject, and other information.
- **Title**—finds the terms you enter in the title of an item.
- **Author**—finds the terms you enter in the author of an item.
- **Subject**—finds the terms you enter in the subject of an item. Subjects are categories assigned to items according to a system such as the Library of Congress Subject Headings.
- **Series**—finds the terms you enter in the title of a multi-part series.
- **Format**
- **Library**

The search features within Evergreen do not require you to enter author last names first, nor do you need an exact title or subject heading. An Evergreen search also enables you to enter plurals and alternate verb endings and will still find results. For example, if you enter *dogs*, Evergreen will also find items with *dog*.

Evergreen assumes an (AND) if you type in multiple terms. You can exclude a term (NOT) using - (minus). For example, *vacations -britain* will search for materials on vacations, but not Britain.

You can search for an exact phrase using double quotes. For example, “*Harry Potter*” will find only items with the exact phrase, not with the terms *Harry* or *Potter* alone.

**Advanced Search:**

1. Make sure that you are searching the entire NC Cardinal catalog when you are searching for new title records.
   (Note the blue circle below.)
Once the search is complete, highlight and click on the appropriate record in the results list. At this time, if there are several titles list that appear to be the SAME item, select the title that has the most copies.

**ALERT:**

You should search for a title in several different ways. Check your search scope and ensure that you are searching all NC Cardinal. Try several different ways to search, for example, title/author versus ISBN.

If there are several titles that appear to be the SAME item, follow these rules:

1. Add your holdings to the most complete MARC record.
2. If all MARC records are equal in quality, select the record that has the most copies.

**Sorting by Date**

When sorting search results by Newest to Oldest, you may think that the sort is not working.

The sort, **Newest to Oldest**, uses the fixed field Date1. Although the 260 tag displays in the **Search Results** window, it is not used for sorting. If the Date1 fixed field is left blank, it appears as if the sort is not working since the titles with blank Date1 fields display at the top of the list.
Step 2: Adding a Title Record via Z39.50 Import Method

It is recommended to check the Local Catalog source when searching for records to import via Z39.50. Even though you have already searched the NC Cardinal database for your item, it is recommended to double check for a match before importing.

If you see “native-evergreen-catalog” among the results of a Z39.50 search, look at the MARC record to see if it is indeed a match. An easy way to do this is to highlight the result line and click on “MARC View” next to the Overlay and Import buttons. To return to the previous display, click “Results View”.

1. Click Cataloging → Import Record from Z39.50
2. Select at least one Service in addition to the Local Catalog in the Service and Credentials window in the top right panel.
3. Enter search terms in the Query window in the top left panel.
4. Click Search.

5. The results appear in the lower window.
6. If a record exists in NC Cardinal, you will see “native-Everygreen-catalog” under the Service column.

**ALERT:**

You should search for a title in several different ways. Check your services and ensure that you have Local Catalog check marked. For example, conduct an ISBN search and if nothing is found, search again by title and author, etc.
7. Highlight the record from the ‘native-Evergreen-catalog’ and click the Show In Catalog button.

The columns displayed on the Z39.50 screen can be customized. Use the column picker to select the information you find helpful, then resize and drag the columns around until they’re in the order you want them displayed. When you get the screen arranged the way you want, click the List Actions button at the far left and select “Save List Configuration” from the pull-down menu.

Step 3: Update the Title Record

If a TITLE record already exists within NC Cardinal, do not add or import a new or additional record. If the existing TITLE record does not meet the standards as outlined in the NC Cardinal Item Templates document, overlay or edit the existing record to bring it up to the minimum standards recommended.

Import from z39.50 screen:
When there is no existing record, import a new record into NC Cardinal from the z39.50 window:

1. Make sure that you have thoroughly searched the local catalog, with search scoping = NC Cardinal.
2. Highlight the record you want to import.
3. Click the Import button.
4. The new record will display in Marc Edit. Make any necessary edits.
5. Click Import Record.

Overlay from the z39.50 screen:
When an existing record needs to be upgraded, overlay an existing brief or incomplete record from the z39.50 window:

6. Highlight the record you want overlaid.
7. Click the Mark local results as overlay target button.
8. Then highlight the record you want to overlay the local catalog record with.
9. Click the **Overlay** button (NOT the **IMPORT** button).
10. The new record will display in Marc Edit. Make any necessary edits.
11. Click **Overlay Record**.

**Step 4: Add Volumes**

When you find a record which matches your item, click on the title to view the record. If you are not in the Holdings Maintenance view, switch to it by clicking on Actions for this Record (Alt + R). Select Holdings Maintenance (Alt + H) from the drop down menu.

When the **Record Summary** window displays, select the menu option, **Actions for this Record → Holdings Maintenance**.

![Actions for this Record](image)

**The Holdings Maintenance window**

The Holdings Maintenance window is the primary window for adding volume and copy (item) records.

1. Make sure that the Show Volumes and Show Items boxes are checked.
2. Select your library from the list and click **Actions for Selected Rows → Add Volumes** or right click and choose **Add Volumes**.
3. Enter the number of volume records (CALL NUMBER records) into the # of volumes field.

4. Type in a call number in the top row and click **Apply** to bring the call number down to the call number field for each volume.

**ALERT:**

The **Use Checkdigit** option, if checked, deletes any spaces entered into the barcode field. You will receive an error message as it removes the extra spaces.
Step 5: Add Items

1. To enter each copy, type in the number of copies in # of Copies field.
2. Scan the copy’s barcode for each copy to be added.
3. When you are finished adding the copy barcodes, click Edit then Create. Use Tab or Enter to move through fields.
4. The Copy Editor opens. Make all necessary edits by a) changing a field to the correct option b) clicking the Apply button for every change.

5. You can use an existing local item template as appropriate.
6. When finished making changes, click Create Copies button.
7. Click OK.
Once an item is created it is assigned a status of *In Process*. Item must be checked in to become *Available* or cataloger can choose to Edit Item Attributes and change status to *Available* once a record has been created and saved to database.

**Batch Import Procedure for Vendor Records**

The Evergreen batch import utility enables you to

- Upload new title and holdings records directly into the catalog (for example, vendor files)
- Merge and/or overlay records that already exist within NC Cardinal according to pre-established rules
- Preserve or remove tags and subfields upon import
- Upload multiple title records at the same time, i.e. “in batch”.
- Use multiple sources, for example, vendor-supplied MARC files, locally created records, and NC Live.

**General Steps:**

1. Download your import file from the vendor site or create your import file with software such as MarcEdit. Limit the number of MARC records within the import file to no more than a few hundred. If you have to, divide the file.
2. Name your downloaded or created file. A suggested notation:

   `xxxxmmddyyyy` where `xxxx` = vendor name, `mmm`=month, `dd`=day, `yyyy`=year

   ** You will use this file within Evergreen. It is recommended that you keep your vendor files for at least 30 days.
3. Log into Evergreen.
4. Click on the **Cataloging** menu (Alt + G) on the top menu bar and select **MARC Batch Import/Export**. The Import Records screen displays. Note that the Evergreen tab is labeled “Server Settings.”
5. Select Record Type = “Bibliographic Records.”
6. Create a New Upload Queue = Type in an appropriate name, one that is recognizable and unique. You could use the filename created in step 2 above.

   a. NOTE: If you accidently skip this field, an unnamed queue is created for you by default. It appears as a blank line at the top of the drop-down list for Existing queues. Any new batches with no queue selected will be added to the unnamed queue.

7. Record Match Set = Choose the appropriate match set, for example, ISBN only.
8. Holds Import Profile = Choose the appropriate profile for your library.
9. Select a Record Source: Choose a record source, for example, OCLC. If your record source is not listed, choose “System Local.”
10. Merge/Overlay Profile: Select the appropriate profile. Import profiles can be created for different vendor files. Contact your State Library staff for assistance. Current overlay profiles are discussed under Notes at the end of this document. Contact your State Library staff for assistance.
11. Import Non-Matching Records = Check this box.
12. Merge on Exact Matches (901c): Do NOT check this option. This option is only used when Evergreen records have been exported, edited, and then you wish to replace the EXACT record.
13. Merge on Single Match: Click on the checkbox next to this option.
14. Merge on Best Match: Check this option.
15. File to Upload: Once you’ve created an Upload Queue and the appropriate Record Source, select the record file. The file should be a record or set of records you have saved in MARC format. Click the Browse button. The File Upload window opens. Use the Look In drop-down box to find the file you need if it is not displayed. When you
have selected the MARC record file and it is displayed in the File Name box, click the **Open** button. The File Upload window will close and your file should be displayed in the “File to Upload” field.

16. The **Upload** button transfers records from the import file to the CARDINAL server. Once the upload button is clicked, the screen displays “Uploading... Processing...” to indicate that the records are being transferred. A progress bar should display, showing the actual import progress.

17. When the records have finished uploading, the Record Queue screen should display. If you selected **Import Non-Matching Records**, all new records and holdings should automatically be imported. Any records that duplicate existing records within NC Cardinal will be displayed in the import queue you created.

**ALERT:**

The more records you have in your import file, the longer it will take to import. It may appear that your records have not been imported. If you have waited a few minutes and nothing appears to be happening, close the **Batch Import** screen and re-open it. You will likely find that the records now appear in your import queue. You do not have to process the queue immediately but can return as your work allows.

*If you’ve selected all the above options Evergreen has matched on the best record for you. If you want to manually match the records yourself, don’t fill out anything below **Record Import Actions**.*
18. Inspect the Import Queue. If all records were imported, you are finished with the import procedure. If there were existing records with the same ISBN, those records will be listed in the import queue. *If you’ve selected all the above options Evergreen has matched on the best record for you. If you want to manually match the records yourself, don’t fill out anything below Record Import Actions.*

**Inspecting the Import Queue**

If your import queue does not open automatically, or if you want to view your imported records at any time, you can access them from the Inspect Queue screen.

To view your uploaded queue,

1. Click *Inspect Queue*. The Inspect Queue screen opens.
2. Select queue type = “Bibliographic Records”.
3. For *Queue*, select the *queue name* and click.

4. To view all the records processed within the selected queue, uncheck the Limit to *Records with Matches* and the Limit to Non-Imported Records checkboxes.
5. Verify that the imported records were added to Evergreen by using the Catalog Search screen within Evergreen. You can find the newly-imported records more easily if you limit your search to your local library.

6. Review any colliding matches that did not import and determine whether they should be added or merged into the catalog.

7. The View MARC link enables you to look at the MARC record for the item displayed in that row. The Matches link displays the colliding, existing record. Click the Matches link; click View MARC to review the existing matching MARC records.

8. Upload colliding and matching records as desired into the catalog. Use the appropriate “Queue Actions”.

NOTE: The Import All Record option imports all records on the page you are viewing, not all records within the queue. You will need to go to the “next page” in order to process more records or alternatively, you can change the results per page list to view more records at one time. Also records which have the same TCN as an existing record in the catalog will not be imported, but records which match existing records based on ISBN will import.

A progress bar should appear and show whether the process has completed. If the process has completed, the Import Queue window will display again. It may take a moment for your records to import. Sometimes the screen will freeze and it may appear that your items have not been imported. If you have waited several minutes and nothing appears to be happening, close the screen and then search for several of the items in the catalog. You will likely find that the records have been imported.
Deleting an Upload Queue

Upload queues are similar in concept to buckets. Choosing the action “Delete Queue” deletes the queue not the records within the catalog. If you are having trouble importing a set of records, it is important to keep the queue for 30 days for troubleshooting purposes. You can delete a bibliographic records queue, but cannot, at this time, delete acquisitions queues.

To delete an upload queue:

1. Check the box next to the queue(s) you wish to delete; select Delete Queue. A dialog box opens to confirm the deletion.
2. Click OK.

The screen refreshes and your queue is gone.

Record Conflicts

All records and holdings may not be automatically imported. Record conflicts can occur and are based upon ISBN and/or TCN. If your record has the same ISBN or TCN as a record that exists in the system, it is identified as a “colliding record”.

You can view colliding records from your import queue. If you determine that the colliding record is not a duplicate, you will be able to import the record from the record queue if the collision is based on ISBN. Records with colliding TCNs cannot be imported from the record queue, just as they cannot be imported via Z39.50.

The record collision feature does not guarantee that you will not import duplicate records. Items without ISBNs such as music CDs and many DVDs will easily import as long as there is no TCN match. You could also import duplicate items if your record has a 13 digit ISBN while the existing record has a 10 digit ISBN.

Be sure to check the system for the records you need before batch importing or do not use the Auto-Import features.

Importing Records with Holdings

You can choose to import your records with attached holdings. If you would like to import your records with holdings attached, contact the State Library for assistance in setting up your holdings profile.
Merge/Overlay Profiles

Existing title records can be merged with imported records. If you would like to create merge/overlay profiles for your records, contact the State Library for assistance.

To merge or overlay an incoming record with an existing Cardinal title record, one must specify which fields and subfields to preserve, which ones to remove, which ones to add, and which ones to replace. Below is a brief explanation of this process:

- **Preserve** - When fields are preserved, the MARC tags in the current NC Cardinal title record, for example local subjects, are kept and not overwritten. No information is lost.
- **Replace** – When fields are replaced, existing information within NC Cardinal is lost for that title record. For example, the 500 tag in your incoming title record overwrites the existing information in the 500 tag.
- **Add** – When fields are added, a tag is created in addition to what currently exists within NC Cardinal. The tag must be a repeatable tag. For example, the 500 tag in your incoming record would be added to the list of existing 500 tags in the NC Cardinal title record.
- **Remove** - When fields are specified to be “removed”, the incoming MARC record does not transfer the field’s information into the matching Cardinal title record. For example, if your vendor record contains a tag that you don’t want to appear in your catalog record, you can specify that tag in the **Remove Specification** field.

You can specify a merge/overlay profile to completely replace an existing record within NC Cardinal. If 000 is entered in the Preserve Column, any imported record overlays the existing NC Cardinal record completely.

There are multiple merge/overlay profiles currently created within Evergreen which can be used as models for designing your own profiles. Please refer to **Appendix C** for existing merge profiles for NC Cardinal.
Pre-Processing / On-Order Materials

Many library systems use brief records for pre-processing or on-order materials. A confirmed order usually includes:

- title/author information
- ISBN numbers

If you are adding an item or volume record and encounter a brief record, overlay the record with a more complete MARC record. It is recommended to use either a record from OCLC or a z39.50 source.

For any on-order material,

1. Search the catalog for an existing record.
   
   **If NO record exists,**

2. Create a record by downloading a MARC record from OCLC, a Z39.50 source, vendor site

   OR

   Create an original MARC record using one of the NC Cardinal Item Templates. The NC Cardinal Templates document outlines the minimum tags recommended for a “good” MARC record. For example, a viable MARC record includes at least the 10- & 13-digit ISBN numbers, Author, Title, Place of Publication, Publisher and Year. Other fields include country code, language type, item type and year in the fixed fields. Please refer to the NC Cardinal Templates document for the type of item you are adding.

3. Volume Name:
   - Enter the purchase order number for the volume name
4. Barcode Field:
   - Enter a ten-digit self-created number for the barcode using the following pattern:
     - The first five digits of your library’s barcode range, which is unique for all libraries in the NC Cardinal system. The last five digits should be unique are the last five of the 13-digit ISBN number. (ex. 50501-97306)
5. In the Item Attributes,
   - Status = On order,
   - Location/Collection = On-order
   - Circulate = YES
   - Holdable = YES.
   By setting Circulation and Holdable to YES, patrons are allowed to place holds on On-Order copies at all levels, Title, Volume and Item.

6. When the book arrives from the vendor,
   - Edit the volume name to the appropriate call number
   - Edit the barcode to match the item’s barcode
   - Apply the appropriate template to the Item Attributes.

7. Conduct a second search to see if there is now a MARC record available on the Z39.50 and overlay the brief record if no record still exists.
If a record exists,
a. Check the existing record for completeness. If the record is brief, overlay a record from either OCLC or a z39.50 source.

**Loading MARC Order Records**
The Load MARC Order Records screen enables you to upload MARC records into Evergreen that are saved on your computer. You can add the records either to a selection list or a purchase order.

**General Steps:**

1. Download your import file from the vendor site.
2. Log into Evergreen.
3. Click on the **Acquisitions** menu on the top menu bar and select **Load MARC Order Records**. The Import screen displays.

4. To upload MARC records and create a new purchase order, then click the check box adjacent to **Create Purchase Order**.
5. To activate the purchase order at the time of creation, click the check box adjacent to **Activate Purchase Order**.
6. **Provider:** Enter the name of the Provider. The text will auto-complete using the existing list of Providers.

7. **Context Org Unit:** Select the appropriate context org unit from the drop down list. The Context Org Unit indicates the organizational unit that **owns** the bib record and will **receive** the items. For example, Henderson County Public Library cannot receive an item, only one of its branches or its main branch.

8. **Add to Selection List:** To select an existing selection list, click the drop down menu. To create a new selection list, type in the name of the new selection list you wish to create.

9. **Fiscal Year:** Select the fiscal year from the drop down list.

10. **Upload to Queue:** Select an existing queue or create a new queue by typing in a new name.

11. **Record Match Set:** Choose the appropriate match set, for example, ISBN only. Please refer **Appendix C** on “Record Match Sets and Merge Profiles” at the end of this document for the correct choice.

12. **Merge Profile:** Select the appropriate profile. Import profiles can be created for different vendor files. Contact your State Library staff for assistance. Please refer **Appendix C** on “Record Match Sets and Merge Profiles” at the end of this document for the correct choice.

13. **Import Non-Matching Records** = It is recommended to **NOT** check this box.

14. **Record Source:** This field is optional. After v 2.9, the record source field appears on the Item Status window. This field is not displayed or accessible for Versions lower than 2.9.

15. **Merge on Exact Matches (901c):** It is recommended to **NOT** check this option. This option is only used when Evergreen records have been exported, edited, and then you wish to replace the EXACT record.

16. **Merge on Single Match:** It is recommended to choose either single or best match. Best match is recommended for most scenarios which not checking the single match checkbox.

17. **Best/Single Match Minimum Quality Ratio:** This is an optional field and it is recommended to skip this field and leave it blank. If you have set up quality ratios, then this field is useful for importing records that have a **quality** equal to or greater than the existing catalog record. Please contact NC Cardinal staff if you are interested in more information about this field.

18. **Merge on Best Match:** Check this option.

19. **Load Items for Imported Records:** If your order records contain holdings information, by default, Evergreen will load them as acquisitions copies. (Note: These can be overlaid with real copies during the MARC batch importing process.) If you check the **Load Items for Imported Records** field then the holding records will be imported as **live** copies that display in the catalog.

20. **File to Upload:** Once you’ve created an Upload Queue, select the record file. The file should be a record or set of records you have saved in MARC format. Click the **Browse** button. The File Upload window opens. Use the Look In drop-down box to find the file you need if it is not displayed. When you have selected the MARC record file and it is displayed in the File Name box, click the **Open** button. The File Upload window will close and your file should be displayed in the “File to Upload” field.

21. The **Upload** button transfers records from the import file to the CARDINAL server. Once the upload button is clicked, the screen displays “Uploading... Processing...” to indicate that the records are being transferred. A progress bar should display, showing the actual import progress.

22. A summary of the items that were processed appears.

23. Click the links that appear to view the purchase order or the selection list.

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**NOTE:**

You can create and activate purchase orders in one step from the Acquisitions – Load MARC Order Records window as well as load bibs and items into the catalog.
Advanced Readers

Advanced readers should not be circulated by libraries.

Gift, Donated, and "In Memory Of" Items

Gift information should not be included on bibliographic records within NC Cardinal. Catalog the item as you would normally, following the recommended MARC templates for the item type, for example, adult fiction, blu-ray, etc. It is recommended that libraries use a plaque or some form of acknowledgment for gifted items OUTSIDE of the catalog.

For internal records, libraries may wish to

- Create an item statistical category; for example: donation: yes/no
- Use an Excel spreadsheet to track donations
- Create a COPY-level note for each individual barcode

To create a copy (item level) note:
1. Search the catalog for an existing record and open the record.

2. Select the Action to open the **Holdings Maintenance** window. (Refer to the Holdings Maintenance Window section in this manual for more information).

3. On the Holdings Maintenance window, select the desired item and right-click. Select the Edit Item menu option. The Item Attributes window will open.

4. If the item record already exists, the **Copy Notes** button displays. Click it to add a copy note.

5. Write the donation/gift/in memory note. Do not mark the note **public**.

6. Use one of the following for the TITLE field:
   - Gift
   - Donation
   - In Memoriam

   7. In the NOTE field, include the donor’s or “In memoriam” name; Example= “Book donated by James Dunn”
8. To add a copy-level note while ADDING a new item, click the Create Copies button to save the information on the Item Attribute window, close it and re-open it in order to see the Copy Notes button.

**Paperbacks and Hardbacks**

Paperbacks should be added to existing hard cover records, provided that the title record in question is the same type, i.e. NOT large print or special edition or audio/electronic resources, etc. and will mostly likely be replaced with a later reprint.

Do not combine paperbacks and hardbacks when the items are

- Special editions
- Large print editions
- Classics that include a special foreword or analysis or is a signed copy.

Follow the specific large print templates in the NC Cardinal Item Templates document.

**Multi-volume or Multi-part Sets**

Multi-part items, for example encyclopedias, DVD sets, and multi-volume sets should be cataloged on one bibliographic record and the Monograph Parts feature within Evergreen utilized.

**Alert:** Copy level notes are not searchable in the OPAC. To retrieve a list of donor items, please contact NC Cardinal staff for the copy note report template.
Monograph Parts Management

The Parts feature within Evergreen enables you to differentiate between parts of monographs or other multi-part items. Catalogers are able to describe items more precisely by labeling the parts of an item. It also provides flexibility to catalog items in different ways – by year, by week, by date. For example, catalogers might identify the parts of a monograph or the discs of a DVD set.

This feature also allows patrons more flexibility when placing holds on multi-part items. A patron could place a hold on a specific disc of a DVD set if they want to access a specific season or episode rather than an entire series. Again, how deep a patron can place a hold on a multi-part set is directly dependent upon how you, as the cataloger, catalog the item and its parts.

To add a monograph part to an existing record in the catalog:

1. Retrieve a record.
2. Click Actions for this Record → Manage Parts
3. Click New Monograph Part
4. Enter the label that you want to appear to the user in the catalog, and click **Save**. This will create a list of monograph parts from which you can choose when you create a volume and copy.

**ALERT:**

Labels are consortium-wide. Use an existing label if it meets your needs.

5. Add a volume and copy. To add a volume and copy to your library, click **Actions for this Record → Add Volumes**.

6. The Volume/Copy Creator opens. Enter the number of volumes that you want to add to the catalog and the volume description.

7. Enter the number of copies and barcode(s) of each item.
8. Select the part designation from the drop down menu adjacent to the barcode field. In this example, the “Episodes 1 – 6)”, located to the far right on the screen.
9. Click the Create with Defaults or Edit then Create if you wish to apply a template to the copies, or edit fields in the Copy Editor.
10. Click Create Copies if in the Copy Editor.
11. The Holdings Maintenance screen will refresh to demonstrate the addition of the volume, copy, and part. These fields also appear in the OPAC View.

Merging Records
1. Do not choose a lead record that does not have an OCLC number.
2. If two records have two different OCLC numbers, do NOT merge the records.
3. If one record HAS an OCLC and the second one does not, and the ISBNs, titles and editions match, merge the records.

Weeding Practices
Deleting Item and Volume Records
When a copy or item record is the last item for a specific volume, the associated volume record should be deleted.

- **Order of Deletion**: The order of record deletion is important; you must first delete a copy record, in order to delete a volume record and subsequent bibliographic (title) record.
- **Items to be replaced**: If the copy is to be replaced, mark the copy as *missing* or *On Order* instead of deleting it. When the new item arrives, replace the missing copy with the new item.

Within NC Cardinal, all libraries are set to automatically delete volumes when the items associated with those volumes are deleted.

Deleting Items from Copy Buckets
When deleting the last copy of a title record which is a part of a copy bucket, Evergreen displays an alert message.
If you **cannot** determine which copy is the last one being deleted, do **NOT** force the override. Click the **Show Status** button and go to the **Item Status** screen. Within the **Item Status** screen, you’ll want to make sure the **Status** column is displaying. A few statuses that place a copy in a state not appropriate for deletion include checked out, in-transit, and on hold.

### Deleting Title (MARC) Records

Evergreen does not let you delete a bib if any other library has holdings.

**ALERT:**

it is extremely important when deleting records from Evergreen to use caution. Be certain that you are deleting what you wish to delete.

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If you delete a MARC record associated with a title, Evergreen marks the records as inactive. In order to retrieve deleted records, you must know the TCN number or Database ID.

### Magazines

There should only be one bibliographic record (title record) for a magazine. Magazines should be treated and cataloged the same way as Monographic Parts or multi-volume sets. For example “Field and Stream” should consist of:

- One title (bibliographic) record with the 245 tag $a = “Field and Stream”

```
035 | 1a 2005214498 | 1b ORG
040 | 1a TxDN | 2b eng | 2c TxDN | 1d OCoLC | 1d NSD | 1d DLC | 1d NSD | 1d DLC | 1d WhN | 1d Cu-S | 1d OCoLC
042 | 1a pcc | 1a nslp
082 | 1a 798 | 12 13
082 | 0a PER
130 | 0a Field & stream (2003)
222 | 0a Field & stream | 1b (2003)
245 | 1a Field & stream
246 | 1a Field and stream
264 | 1a New York, N.Y.: | 1b Field & Stream, | 1c 2003-
300 | 1a volumes: | 2b illustrations; | 1c 27 cm
340 | 1a Monthly
```
• Item records and volumes may be cataloged as parts or using separate call numbers. (Example below)

New Copies and Holds
Because of the way Evergreen targets holds, new copies are not guaranteed to fulfill pre-existing holds up to 24 hours after cataloguing. If your cataloguing turn-around time is shorter than 24 hours you can ensure the new copy is captured correctly at check in by:

1. After adding the item, select Actions for this Record → View Holds from the Holdings Maintenance window.
2. If there are outstanding hold requests, select the hold that is next in line then choose Actions for Selected Holds → Find Another Target. This forces Evergreen to re-target the hold and recognize the newly catalogued item.
3. Check in the new item to capture it for the selected hold.

From the View Holds screen:

4. Select your library as the default pickup and highlight the hold at the bottom of the list.
5. Click ‘Actions for this Record’.
6. From the drop down list choose ‘Mark as Title Hold Transfer Destination’. Click OK.
7. Click ‘Actions for Selected Holds’. Choose ‘Transfer to Marked Title’ from the drop down list.
8. Choose ‘Capture Hold’ or ‘Check-in’ to capture the hold and make available for a patron.

Note: If a new item’s holds are not converted, the hold will appear on the pull list for holds requests the next day.
APPENDIX A – Diacritics

There are several methods for entering diacritics into Evergreen:

1. Click the CTRL+S key when in the MARC Editor window to bring up the diacritics palette.
2. Copy and paste the symbol from the web page into the MARC editor window. For example: http://symbolcodes.tlt.psu.edu/accents/codealt.html#accent

Note:

- When searching within Evergreen, if you search for “josé”, you will obtain items with “jose”.
- KNOWN BUG: When you enter the MARC edit screen and click inside in a subfield area of a tag you are able to hit CTRL+S to bring up the Diacritics window. When you first go into the MARC edit screen this option works fine. If you click on the Flat-Text Editor option and then un-click the option the CTRL+S option stops working.

APPENDIX B – Using GMDs

GMDs should not be used except where noted in the NC Cardinal MARC Templates document. The use of new icons will be used in lieu of non-standard GMDs. Use the 300 tag to include any information that you would place into the GMD if it is non-standard. Incoming records with customized GMDs: move the 245$h from the incoming record and add to a 300 tag.

APPENDIX C – Record Match Sets and Merge Profiles

NC Cardinal has established several default record match sets and merge profiles for consortium use. If new profiles or record match sets are needed, please contact NC Cardinal staff.

Record Match Sets within NC Cardinal:

1. ISBN = matches on the ISBN field
   - Expression for set: (020 $a)

2. ISBN_AUTHOR = matches on the ISBN and Author fields. Heavier weight is given to the ISBN field
   - Expression for set: (100 $a AND 020 $a)
   - Weight: 020 = 3; 100 = 1;

3. ISBN_OCLC – matches on the ISBN and OCLC number fields. This match set is weighted with the preference given to the when a record matches on both 035 $a and 020 $a versus either the ISBN or the OCLC number
   - Expression for set: (020 $a OR (035 $a AND 020 $a))
   - Weight: 020 = 1; (035 and 020) = 5 each.

Merge Profiles

Merge profiles enable you to specify which tags should be removed or preserved for existing catalog records when you import MARC records into Evergreen. NC Cardinal has established several default record match sets and merge profiles for consortium use. If new profiles or record match sets are needed, please contact NC Cardinal staff.
To merge or overlay an incoming record with an existing Cardinal title record, one must specify which fields and subfields to preserve, which ones to remove, which ones to add, and which ones to replace. Below is a brief explanation of this process:

- **Preserve** - When fields are preserved, the MARC tags in the current NC Cardinal title record, for example local subjects, are kept and not overwritten. No information is lost.
- **Replace** – When fields are replaced, existing information within NC Cardinal is lost for that title record. For example, the 500 tag in your incoming title record overwrites the existing information in the 500 tag.
- **Add** – When fields are added, a tag is created in addition to what currently exists within NC Cardinal. The tag must be a repeatable tag. For example, the 500 tag in your incoming record would be added to the list of existing 500 tags in the NC Cardinal title record.
- **Remove** - When fields are specified to be “removed”, the incoming MARC record does not transfer the field’s information into the matching Cardinal title record. For example, if your vendor record contains a tag that you don't want to appear in your catalog record, you can specify that tag in the **Remove Specification** field.

**Existing Profiles For Bibliographic Record Import**
- **Evergreen Import** - preserves the 035 tag and overlays all other tags from the incoming record
- **EBook** - replaces the 901c tag and adds additional 856 tags from the incoming record fields
- **EBook - Update Libs** - replaces the 901c tag and adds additional 856 $9 fields from the incoming record
- **Full Overlay** - preserves the 90c tag and the 520 tag, overlays all other tags from the incoming record

**Existing Profiles For Order Record Import**
- **Match-Only Merge** - replaces the 901c tag from incoming order records