

**Sirsi libraries:**

- Select SmartPort and then select **"UC-UNIQUE"** as the catalog to which to connect and capture the template record.
- Match and Load replacing **the title control with "C"** (capital C).
- *NOTE: These instructions will identify subfields with a \$ rather than the Sirsi pipe ( | )*

**MultiLIS libraries:**

- If your ITC has loaded the templates into a local bank you can use "Create and Update Bibliographical Records" to copy the templates as needed, using PF3 "Create a Record" then PF2 "Copy a Record."
- If your ITC has NOT loaded the templates to a local bank, select the menu option, "Search/Export Union Catalog MARC Records." After templates are tagged for export, MultiLIS libraries should select the third load option, **"Load all bibs AND accompanying MultiLIS fields as new records."** (DON'T include bib records in an export that contains templates, unless you wish to load those bibs as new.)

**Stand-alone libraries:** Use the UCAP Procedure.

## Annual Template Instructions for Original Cataloging

January 2006

- If the publication has pages added or removed to keep it current, catalog as an Integrating Resource and use the Integrating Resource Template. **Websites are usually treated as Integrating Resources and require the Integrating Resource Template as well.**
- Note an annual is considered a serial. The term serial is synonymous with Continuing Resource. An Integrating Resource is a Continuing Resource. Be careful not to confuse the terms.

**Do a title search for ANNUAL TEMPLATE. NOTE:** It is recommended that templates be downloaded as needed, as they may be updated from time to time by INFOhio and they could become corrupted if left to reside in a local catalog.

These instructions make certain assumptions regarding the cataloging of this material, and no inferences should be made about cataloging other materials or about cataloging in general.

**Indicator positions will be blank unless otherwise specified.**

**There will be no ending punctuation for the tag unless otherwise specified.**

- (R) next to a tag indicates the tag may be repeated in the record.
- (NR) next to a tag indicates the tag may NOT be repeated in the record.
- (R) next to a subfield indicates the subfield may be repeated within a tag.
- (NR) next to a subfield indicates the subfield may NOT be repeated within a tag.

**MultiLIS users:**

Press [PF4] key for "Tag to add" prompt; [PF1] key to return to "Tag to modify."  
Press [F6] key to remove a tag that has been selected for modification.

**Sirsi users:**

Use **"DELETE"** and **"INSERT"** Helpers to delete or add a tag.

**Sirsi and Other users: It is recommended that you have an online copy of these instructions open to easily utilize the links included in this document.**

## EDITING THE TEMPLATE

Information in bold below requires your attention. That which is not in bold is informational.

### FIXED FIELDS

These fixed field instructions assume your cataloging software provides a list of codes from which to select for fixed fields. If your software does not do this, you can find the more common codes within this document and additional codes at the Library of Congress Web site provided within the text below. The description of the Leader and 008 elements may be abbreviated differently on different library systems. The order of the display may also vary from system to system.

### Sirsi Users

Sirsi does not provide a list for you. Nor does it clearly indicate where the Leader and 008 tag begin and end within the "Fixed Fields" display. The Sirsi system does not label the Leader and the 008 tag as such.

**Leader** = first five elements of the "Fixed Field" display.

**008 tag** = elements immediately following the five elements of the Leader

Rec_Type	a	Bib_Lvl	s	Enc_Lvl	u
Desc	a	TypeCtrl		Entrtd	040225
Dat_Tp	c	Date1		Date2	
Ctry		Lang	eng	Mod_Rec	
Source	d	Frequn	a	Regulr	r
ISDS		Ser_Type	m	Phys_Med	
Repr		Pub_Type		Cont	
GovtPub		ConfPub	0	Alphabt	a
SLI_Ent					

**IMPORTANT:** When you click in one of the fixed field boxes that accepts more than one character it does not automatically left justify. Be sure to press the left arrow to be sure you are at the left most position when entering data into a fixed field.

Leader This field does NOT need to be edited  
Type of record = a  
Bibliographic level = s  
Encoding Level = u <Unknown  
Descriptive cataloging form = a  
Type of Control = <blank means it is not archival

### 008 The codes for the 008 tag are listed below. Edit as indicated in bold.

Sirsi users will find the 008 tag elements will begin with the 6<sup>th</sup> element in the fixed field from left to right and will begin with Entrtd which must be edited.

Date (Entrtd): 040225 <This date must be replaced with the current date. Enter as YYMMDD.

Status (Dat\_Tp): c <Currently published. **Change to 'd' if publication has ceased. MultiLIS users will find a display of an "n." It MUST be changed.**

Date 1: <Enter **FIRST** date of publication. If unknown, you must estimate a date; replace the unknown digits with the letter 'u.' EXAMPLE: 19uu.

Date 2: <Enter **LAST** date of publication. If still in production enter 9999.

Place (Ctry): <For **U.S.** publications enter two-character abbreviation for state followed by "u." EXAMPLE: ohu for Ohio. Enter xx if place is not known. and enter [S.I.] in 260 \$a.  
[http://www.loc.gov/marc/countries/cou\\_pt3region.html#north](http://www.loc.gov/marc/countries/cou_pt3region.html#north)

Lang: eng <Edit if not English  
<http://www.loc.gov/marc/languages/langhome.html>

Mod rec:  
 Source: d  
**NON MultiLIS sites:** Codes for the remainder of the 008 tag are at:  
<http://www.loc.gov/marc/bibliographic/ecbd008s.html#mrcb008s>  
 It is recommended that you have this site open in your browser so it is available when editing the remaining portion of the 008 tag.

Frequency: a <Edit if published other than annually. See bullet 18 at above URL  
 Regularity: r <Edit if NOT regular. See bullet 19 at above URL  
 ISSN (ISDS): <Leave Blank  
 Type ser (Ser Type): m  
 Form/orig(Phys\_Med): <Provide a code ONLY if the Original annual is a type of microform, large print, braille, print reproduction or electronic format. See bullet 22 at above URL.

Form of item (Repr): <Same code rule as for original  
 Pub. type: <If you wish to provide See bullet 24 at above URL  
 Cont: <If you wish to provide See bullet 25-27 at above URL  
 Govt pub: <Edit if a government publication, See bullet 28 at above URL

Conf pub: 0 <If annual IS a conference publication change this value to 1.  
 Alphabet: a <Basic Roman. No diacritics or special characters. See bullet 33 at above URL

S/L title (SLI\_Ent): | < No attempt to code

**REMOVE the 856 tag.** MultiLIS users enter the line number for the 856 tag, and then press the [F6] to remove the tag.

**Enter the following tags as appropriate.** MultiLIS users press [PF4] key for "tag to add" prompt.

## 010 Library of Congress Number (NR)

### \$a LC control number (NR)

LCCN structure has recently changed. Following should help determine the number of blank spaces that may need to be entered before the year portion of the LCCN.

LCCN Structure	(1898-2000)	(2001-)
Alpha prefix positions	3	2
Year positions	2	4
Serial number	6	6

Supplement number 1  
Suffix and/or Revision date variable

EXAMPLES: 010 \$a 2001627090  
010 \$anuc76039265  
010 \$a 79139101 /AC/MN

**022 ISSN (R)**

**\$a ISSN (NR)**

**While hyphens are not used when entering ISBNs, the hyphens ARE USED when entering an ISSN.**

EXAMPLES: 022 \$a0084-1382

**040 Cataloging Source (NR)**

**\$a Cataloging agency (NR)**

**\$c Transcribing agency (NR)**

**Enter your Organizational (LC/NUC) Code in both subfields**

If you do not know your code, go to <http://www.infohio.org/UC/LOCcodesRev.html>

EXAMPLE: 040 \$aOLmIUC\$cOLmIUC

**082 Dewey Decimal Call Number (R)**

**NOTE: If you do not have access to Dewey and are assigning a classification number based upon classification numbers in use in your collection, use 092 instead of 082.**

**Indicators:**

**1<sup>st</sup> 0 = Full edition**

**1 = Abridged edition**

**2<sup>nd</sup> 4 = Assigned by agency other than LC**

**\$a Classification number (R)**

**\$2 Dewey edition number (NR)**

EXAMPLES: 08204\$a355.02/17\$219

08204\$a343.7306/8\$a347.30368\$220

**092 Local call number (R)**

**NOTE: If using an edition of the "Dewey Decimal Classification" to assign the Dewey classification number, use the 082 tag instead of 092.**

**\$a Classification number**

EXAMPLE: 092 \$a355.02

**245 Title (NR)**

- **MultiLIS users enter line to modify and then press [insert] or [home] key for overstrike to replace template content.**

Capitalize first word and proper names only.

**Chief source of information is the title page. If there is no title page, use the part of the item supplying the most complete information in the following order: cover (excluding book jacket), caption (title given at the beginning of the first page of the text), colophon (statements at the end of the item), running title (repeated at the head or foot of each page or leaf), or other part. Specify in a 500 note field the part used if not the chief source of information.**

EXAMPLE: 500 \$aTitle from cover.

**Indicators:**

**1<sup>st</sup> 0 - 1XX tag NOT present**

**2<sup>nd</sup> Number of non-filing characters for leading article.**

The = 4

A = 2

**If no initial article enter a zero ( 0 )**

An = 3

Les = 4

**\$a Title (NR)**

**\$n** Number of part/section of work (NR)

**\$p** Name of part/section of work (NR)

**\$h** Medium (NR)

} Reflects order subfields are entered

**Punctuation for additional subfields:**

- **Subfield \$n data follows a period (.)**
- **Subfield \$p data follows a period (.) when preceded by subfield \$a or another subfield \$p.**
- **Subfield \$p follows a comma (,) when it follows subfield \$n.**

**EXAMPLES:**

**24504**\$The World almanac and book of facts.

**246** Varying Form of Title. (R)

**Indicators:**

**1<sup>st</sup> 3 = No note, added entry**

**2<sup>nd</sup> Type of title. Can be left blank.**

blank No type specified

0 Portion of title

1 Parallel title

2 Distinctive title

3 Other title

4 Cover title

5 Added title page title

6 Caption title

7 Running title

8 Spine title

**\$a Title (NR)**

For further explanation see <http://www.oclc.org/bibformats/en/2xx/> and select 246.

**Punctuation:**

- **Tag does not end with a mark of final punctuation, unless the field ends with an abbreviation, an initial/letter, or other data that ends with a mark of punctuation.**

**EXAMPLE:** **24504**\$aThe World almanac and book of facts.

**2463** \$aWorld almanac & book of facts

**260** Imprint statement (Publication information). (NR)

- **Locally produced material has no place of publication or publisher;** subfields “a” and “b” are not present.
- **Order of prescribed source of information:** title page, other preliminaries, colophon (statements at end of the item).
- This field is subject to authority control in MultiLIS.

- *While the subfields in this tag can be repeated, it is not recommended that you attempt to do this.*

**Punctuation:** This tag ends with a mark of punctuation as indicated below.

**\$a Place of publication (R)**

When place is unknown enter [S.I.]

**Punctuation:**

- Subfield \$a ends with space colon ( :) when it is followed by \$b
- Subfield \$a ends with space semicolon ( ;) when it is followed by another \$a
- ~~Subfield \$a ends with a comma (,) when it is followed by \$c~~ This should never occur. See instructions for \$b when publisher is unknown.

**\$b Publisher/ distributor (R)**

When publisher/distributor is unknown enter [s.n.]

**Punctuation:**

- This subfield is always *preceded* by a space and a colon ( :)
- Subfield \$b ends with a comma (,) when it is followed by \$c
- Subfield \$b ends with space colon ( :) when it is followed by another \$b
- Subfield \$b ends with a space semicolon ( ;) when followed by another subfield \$a

**\$c- Date of first issue (R)**

if date of first issue is not available, there will be NO \$c

**Punctuation:**

- This subfield, when used, is always preceded by a comma (,)

EXAMPLES:

260 \$aNew York :\$bPress Pub. Co.  
260 \$aSan Francisco :\$bHarper,\$c1995-

For additional information see:

*Tag Tutor* <http://www.infohio.org/UC/TagTutors/Default.html>  
*OCLC Bibliographic Format* <http://www.oclc.org/bibformats/en/2xx/> and select 260.  
INFOhio archives [http://www.infohio.org/UC/HelpArchive/Cat260\\$c.html](http://www.infohio.org/UC/HelpArchive/Cat260$c.html)

**300 Physical description. (R)**

**Punctuation:**

- This tag always ends with a mark of punctuation. If one is not part of the content ending the tag, provide a period.

**\$a Extent (R)** Contains the number of pages and physical parts. **Works that are not yet complete, only the type of unit designation is recorded preceded by three spaces.**

EXAMPLE: 300 \$a v.

**Punctuation:**

- Subfield \$a ends with space colon ( :) when it is followed by \$b
- Subfield \$a ends with space semicolon ( ;) when it is followed by \$c
- Subfield \$a ends with space plus sign ( +) when it is followed by \$e

**\$b Other physical details (NR)** see examples below.

**Punctuation:**

- This subfield is always *preceded* by a space and a colon ( :)
- Subfield \$b ends with space semicolon ( ;) when it is followed by \$c
- Subfield \$b ends with space plus sign ( +) when it is followed by \$e

## \$c Dimensions (R)

### Punctuation:

- This subfield is always *preceded* by space semicolon ( ;)

EXAMPLE: 300 \$av. :\$bill., maps ;\$c19-22 cm.

For additional information see:

*Tag Tutor* <http://www.infohio.org/UC/TagTutors/Default.html>

*OCLC Bibliographic Format* <http://www.oclc.org/bibformats/en/3xx/> and select 300.

## 310 Frequency of publication. (NR)

**Punctuation: Does not end mark of punctuation, unless other data ends with a mark of punctuation.**

### Example:

310 \$aAnnual

## 362 Dates of publication and/or Sequential Designation (R)

### 1<sup>st</sup> indicator format of date

0 Formatted style

1 Unformatted style (When the first and/or last piece is not in hand but the information is known from other pieces or sources.)

2<sup>nd</sup> indicator undefined.

### \$a Dates of publication and/or sequential designation. (NR)

Sequential designators and dates are recorded as given on the item. When both a numeric designation and a chronological designation are given, the chronological designation is enclosed in parentheses.

**Punctuation: The field ends with a period unless another mark of punctuation is present.**

### Examples:

3620 \$a1968-

3620 \$a15th (1961)-50th (1997)

3621 \$aBegan in 1995-

## 500 General note (R)

### \$a General note (NR)

### Punctuation:

- The field ends with a period, unless another mark of punctuation is present.

## 521 Target audience. (R)

(See <http://www.infohio.org/Documents/CRCTF/GuidelinesEnhancingMARC.pdf> for more detailed information. Consult this document for Fountas & Pinnell Leveled Books)

- For interest levels INFOhio recommends the following as the most universally used.

K-3

3-6

5-8

7-10

9-12

### Indicators:

1<sup>st</sup> 0 = Reading level

1 = Interest age level

2 = Interest grade level

3 = Special audience characteristics

8 = No display constant generated

**\$a Target audience note (R)**

**\$b Source (NR)**

**Punctuation: Ends with a period unless another mark of punctuation is present.**

EXAMPLES: 5212 \$a7-10.

5218 \$aFor remedial reading programs.

For additional information see:

*Tag Tutor* <http://www.infohio.org/UC/TagTutors/Default.html>

**OC LC Bibliographic Format** <http://www.oclc.org/bibformats/en/5xx/> and select 521.  
INFOhio Guidelines

<http://www.infohio.org/Documents/CRCTF/GuidelinesEnhancingMARC.pdf>

## 550 Issuing body note (R)

**\$a Issuing body note (NR)**

**Punctuation: Ends with a period, unless another mark of punctuation is present.**

Enter information referring to current and former issuing bodies, including notes containing compiling, editing or translating information that involves an issuing body. Use field 550 also for notes denoting the item as an official organ of a society, etc. **Use for issuing bodies traced in a 7xx added entry field.** The field explains their relationship to the publication and justifies the 7xx added entry.

Notes relating to commercial publishers, distributors or places of publication are recorded in field 500. A corporate body that only publishes does not warrant an added entry. To alert the user of the record that there had been a change, the information is recorded in a 500 note. That way a user knows to use that record. With an issuing body, you want to not only record the information but add added entries for the names

EXAMPLES:

550 \$aEditors: 1961-1974, Dan Golenpaul; 1975- Ann  
Golenpaul.

7001 \$aGolenpaul, Dan.

7001 \$aGolenpaul, Ann.

260 \$aWashington, D.C. :\$bU.S. Dept. Of Commerce, Bureau of  
the Census

550 \$aVols. For 1878-1902 issued by the Bureau of Statistics  
(Dept. Of the Treasury); 1903-11 by the Bureau of  
Statistic (Dept. Of Commerce and Labor); 1912-37 by the  
Bureau of Foreign and Domestic Commerce; 1938- by  
the Bureau of the Census.

7101 \$aUnited States.\$bBureau of the Census.

7101 \$aUnited States.\$bDept. Of the Treasury.\$bBureau of  
Statistics.

7101 \$aUnited States.\$bDept. Of Commerce and Labor.\$bBureau  
of Statistics

7101 \$aUnited States.\$bBureau of Foreign and Demistic  
Commerce.

## 6XX Subject Access Fields. (R)

**This field is subject to authority control.** Within MultiLIS a list of current headings will appear. Authorized headings will be preceded by two asterisks (\*\*). If there is no matching heading to display, you will be given the option to create a “Single Entry.” **Check Library of Congress authorized headings if no authority is provided, <http://authorities.loc.gov> The authorized heading and subfields will be in a 1xx tag of the authority record.**

053 \_0 la E201 lb E298

151 \_\_ la United States lx History ly Revolution, 1775-1783

360 ll subdivision la History--Revolution 1775-1783 ll under names of regions states cities etc



**Use information provided below ONLY if no authorized heading at LOC.**

**Punctuation:**

- When creating a single entry (unauthorized entry) end the field with a period.

600 Personal as subject. (NR)

Indicators:

1<sup>st</sup> 0 = Forename

1 = Surname

3 = Family name

2<sup>nd</sup> indicator

4 = Source not specified

Appropriate subfields:

\$a Personal name (NR)

650 Topical Term. (R)

Indicators:

2<sup>nd</sup> indicator

4 = Source not specified

Appropriate subfields:

\$a Topical term. (NR)

\$v Form subdivision designates specific kind or genre of material such as “Fiction.” (R)

\$x General subdivision. (R)

\$y Chronological subdivision. (R)

\$z Geographic subdivision. (R)

651 Geographic Name. (R)

Indicators:

2<sup>nd</sup> indicator

4 = Source not specified

Appropriate subfields:

\$a Geographic name. (NR)

\$v Form subdivision designates specific kind or genre of material such as “Fiction.” (R)

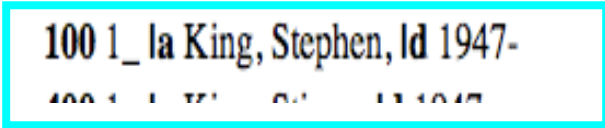
\$x General subdivision. (R)

\$y Chronological subdivision. (R)

\$z Geographic subdivision. (R)

**7XX Added Entry (R)**

**This field is subject to authority control.** Within MultiLIS a list of current headings will appear. Authorized headings will be preceded by two asterisks (\*\*). If there is no matching heading to display, you will be given the option to create a "Single Entry." **Check Library of Congress authorized headings if no authority is provided, <http://authorities.loc.gov> The authorized heading and subfields will be in a 1xx tag of the authority record.**



**Use information provided below ONLY if no authorized heading at LOC.**

**Punctuation:**

- When creating a single entry (unauthorized entry) end the field with a period.

700 Personal Name. (R) **May choose to use this tag to be able to search for authors entered in a 505 tag, or joint authors or contributors.**

Indicators:

- 1<sup>st</sup> 0 = Forename
- 1 = Surname

Appropriate subfields:

\$a Personal name (NR)

710 Corporate Name (R)

Indicators:

- 1<sup>st</sup> 0 = Inverted name
- 1 = Jurisdiction name
- 3 = Name in direct order

Appropriate subfields:

\$a Corporate name (NR)

730 Uniform Title (R)

Indicators:

- 1<sup>st</sup> number of non-filing characters for leading article.
- The = 4                      A = 2                      **If no initial article enter a zero ( 0 )**
- An = 3                      Les = 4

\$a Uniform title (subfield may NOT be repeated within the tag)

**989 Do NOT remove this tag.**

## Questions?

- See *Guidelines for Enhancing MARC Records*  
<http://www.infohio.org/Documents/CRCTF/GuidelinesEnhancingMARC.doc>
- Or consult <http://www.loc.gov/marc/> and/or <http://www.oclc.org/bibformats/> for more information about MARC tags. (Note that AACR2 governs cataloging, not MARC. Therefore, these sites do NOT provide guidelines for cataloging. They assume a working knowledge of AACR2.)
- Or submit cataloging questions to CRCTF\_CHAIRS@INFOHIO.ORG.