

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 DASite 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 DASite 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.

Equipment Template Instructions for Original Cataloging

December 2003

Some DASites have templates available which permit the bibliographic record to be used for all item specific information. Each item requires its own bibliographic record. Contact your DASite if you wish this level of specificity. The template provided here allows multiple items with limited item specific information to be attached to a single record.

Do a title search for EQUIPMENT 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.

This record is for management purposes only, as it is not bibliographical information that easily lends itself to MARC cataloging. Therefore, liberties are being taken with the MARC record to meet these management needs. Some fixed codes will not be appropriate, but MultiLIS will not allow them to be omitted.

This template is constructed so that one bibliographic record identifies all similar items that the bibliographic record describes. It is local policy whether the generic item title includes the model and manufacturer. Large districts may have so many different types of a particular type of equipment that it is helpful to identify the specific model and manufacturer in the title.

One of the problems with an equipment template is trying to address all functions that individuals may require of such a management tool. Data that needs to have its own search criteria for retrieval purposes must be in an indexed field. Another problem can be the large amount of item specific data that needs to be searchable, but the item record is insufficient for those purposes. One such example is the numerous numeric data that represents a specific item: serial number, district insurance number, local building identification number that libraries often write on the equipment, and item barcode number for circulation and inventory purposes. This template utilizes searchable repeatable tags in the bib record to store some item specific data.

Ability to search on various identification numbers: There are typically three to four different numbers that identify a piece of equipment: There are not adequate data fields in the item record to record these numbers and to be able to search on them individually. Therefore, these numbers are recorded in the bibliographic record, and each is linked to the local identification number for cross-reference purposes. The tags in which these numbers are stored are searchable and they are repeatable, so that they can represent multiple items.

- **serial number (024 \$a. Tag is repeatable)**
- **district insurance number (092 \$a. Tag is repeatable)**
- **local markings for identification purposes (024 \$d and 092 \$d to link serial number and district insurance number to specific item.)**
- **item barcode number**

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.

EDITING THE TEMPLATE

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

Leader This field does NOT need to be edited, although the type of material is not actually realia and it is not a monograph. There are no appropriate codes for equipment, and MultiLIS will not allow these fields to be blank.

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

008 Only tag that needs to be edited is the creation date. Edit as indicated in bold.

Date: 030711 <**This date must be replaced with the current date. Enter as YYMMDD**

024 Searchable tag for serial number (R)

Use if needed. This tag may be repeated and is used so that you can search item specific information. The digits entered in subfield \$a can be searched on a numeric search.

1st indicator 7

\$a Serial number. (NR)

\$d Local identification number. (NR) This will link the serial number to the local identification number.

\$2 Enter the words “Serial number” (NR) to identify the number in \$a as a serial number.

Example: 0247 \$aGT3456\$dHS#4\$2Serial number

092 Searchable tag for district insurance number. Use if needed. (R) This tag may be repeated and is used so that you can search item specific information. The digits entered in subfield \$a can be searched on a numeric search.

\$a District insurance number (NR)

\$d Local identification number (NR) This will link the district insurance number to the local identification number.

\$2 Enter the words "District insurance number" (NR) to identify the number in \$a as the district insurance number.

Example: 092 \$a12345\$dHS#4\$2District insurance number

245 Title. (NR)

\$a Equipment name (NR)

\$h Word "Equipment" between square brackets (NR)

\$b Model (optional) (NR)

\$c Brand name or manufacturer (suggested; can be part of title or omitted altogether, per local needs.) (NR)

Punctuation: This tag will always end with a period.

\$b- if this subfield is present, the preceding subfield will end with a space followed by a colon (:)

\$c- if this subfield is present, the preceding subfield will end with a space followed by a slash (/)

Examples:

24500\$aOverhead projector\$h[equipment].

24500\$aOverhead projector\$h[equipment] :\$bModel 45FB /\$cBuhl.

24500\$aOverhead projector\$h[equipment] /\$c3M.

260 Not used for equipment

300 Not used for equipment

500 General notes. (R)

This tag is NOT searchable in MultiLIS.

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

\$a Note (NR)

Example: 500 \$aPermanently mounted in Rm 222.

 500 \$aRequires EKA lamp.

520 Summary, etc. notes. (R)

This tag IS searchable in MultiLIS.

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

\$a Note (NR)

Example: 520 \$aLamp EKA

538 System details. Might wish to use for computer equipment. (R)

This tag is NOT searchable in MultiLIS.

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

Indicators: Blank

\$a Note (NR)

Example: 538 \$aHS#3 has 64K of memory.

690 Terms on which you might wish to search.

989 Do NOT remove this tag.

Item:

Item number: This is the barcode number. (Districts might want to consider using a 14 million range employing the district insurance number as the sequential number. If you choose to do this, you will not need the 092 tag in the record.
Example: 14011234X (In this instance the district insurance number is 11234.)

Collection Code: EQUIP (suggestion)

Shelf number: Local identification number (This number has been entered in the bibliographic record in the 024 subfield \$d to identify the corresponding serial number and may have been entered in subfield \$d of the 092 to identify the insurance number, if the insurance number is not used for constructing the barcode number.)

Item Notes: Record item specific information such as repair data, PO#, etc. This information cannot be searched.

Questions?

- Consult your DASite or other libraries.
- E-mail the task force: CRCTF_CHAIRS@INFOHIO.ORG