

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.

Periodical (Electronic) Template Instructions for Original Cataloging

January 2006

Do a title search for PERIODICAL **(ELECTRONIC ONLINE)** 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. . Nor does it identify the 006 tag.

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

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

006 tag = elements in the Fixed Field area following the break at the end of the 008 elements

The screenshot shows a 'Fixed Fields' form with three columns of input boxes. Callouts identify specific sections:

- Leader:** A callout box points to the first five elements: Rec_Type (a), Desc (a), Dat_Tp (c), Ctry (), and Source (d).
- 008 tag elements:** A callout box points to the start of the 008 tag elements, which includes Enc_Lvl (u), Entrd (031210), Date2 (), Mod_Rec (), Regulr (r), Phys_Med (s), Cont (), and Alphabt (a).
- 006 tag elements:** A callout box points to the 006 tag elements, which includes TypeCode (m), Audience (), Frequri (), and FileType ().

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 6th element in the fixed field from left to right and will begin with Entrd which must be edited.

Date (Entrd): 031210 <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: <Beginning date of publication. If it is not known, enter the digits that are known and replace the others with "u." For example, if you can narrow it only to the 20th century only enter 19uu. If you know it couldn't have been before 1950, enter 195u.

Date 2 < Ending date of publication. If the serial has not ceased publication enter 9999 .

Place (Ctry): <For US 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

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: <Enter frequency code See bullet18 at above URL

Regularity: r <Edit if publication is not regular See bullet19 at above URL

ISSN (ISDS): <Leave Blank

Type ser (Ser_Type): p <Edit if not a periodical See bulle21 at above URL

Form/orig (Phys_Med): s <electronic

Form/item (Repr): s <electronic

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 periodical 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

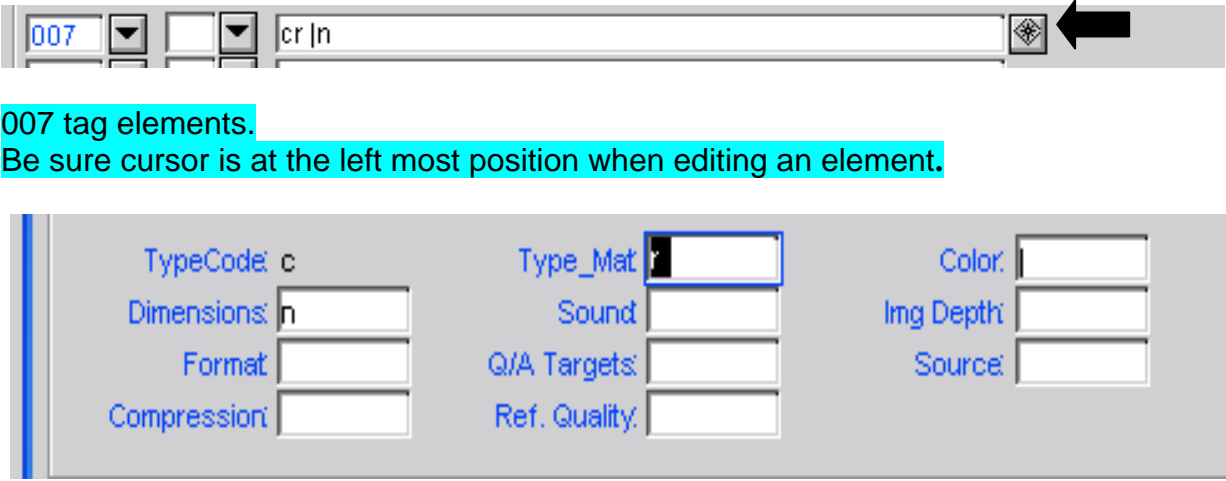
006 No editing required.

TypeCode: m	Frequi:	Regulr:
Audience:	FileType:	GovtPub:

Code 006 (TypeCode): m <computer

007 The codes entered for the 007 tag are listed below. If a code is not appropriate, you must change it. A complete listing of codes for those whose system does not display them is available at: <http://www.loc.gov/marc/bibliographic/ecbd007s.html#mrcb007c>

Sirsi users click on the gadget to the right of the 007 tag to display elements.



007 tag elements.
Be sure cursor is at the left most position when editing an element.

GMD (TypeCode): c computer
SMD (Type_Mat): r remote
Color: no attempt to code See bullet 03 at above URL
Dimensions: n not applicable
Sound: blank for silent See bullet 05 at above URL

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.

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

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 from formally presented evidence (e.g., title screen(s), main menus, home page(s), etc. and the physical carrier or its labels. (Label refers to any label permanently affixed to a physical carrier as opposed to those on the container.)
- Always give the source of the title proper in a 500 note tag.

- Use fuller form of title if initials and fuller form exist on title page. Enter initials in a 246 tag.
- Subtitle information is only used if the subtitle contains the issuing corporate body.

Indicators:

1st 0

2nd 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)

\$h Medium [electronic resource] (NR)

\$b Remainder of title (NR)

} Reflects order subfields are entered

Punctuation for additional subfields:

- Subfield \$h is always starts and ends with square brackets

EXAMPLES:

24500\$aTime\$h[electronic resource]

24500\$aSchool Library Journal\$h[electronic resource]

2463 \$aSLJ

246 Varying Form of Title. (R)

Indicators:

1st indicator generally 3 (no note, added entry)

2nd indicator 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)

\$b Remainder of 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.

EXAMPLES: 24500\$aYoung miss magazine

2463 \$aYM

250 Edition (NR)

If an edition statement belongs to one of the following types, enter the statement in a 250 tag. Changes in edition are usually but not always considered to be minor changes and therefore a 250 tag is not usually needed.

- i. local edition statements
Northern ed.
- ii. special interest edition statements
Doctor's edition
- iii. special format or physical presentation statements
Braille ed.
- iv. language edition
English ed.

\$a Edition statement (NR)

Punctuation: This tag ends with a period.

EXAMPLES: 250 \$aCentral edition.
250 \$aEnglish ed.

260 Imprint (publication) statement. (NR) This field is subject to authority control in MultiLIS.

- **Locally produced material has no place of publication or publisher;** subfields “a” and “b” are not present.
- **Order of prescribed source of information:**
- ***While the subfields in this tag can be repeated, it is not recommended that you attempt to do this.***

\$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

\$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 Contains date of publication/distribution (R)

Use subfield \$c ONLY when the first issue is in hand, otherwise no date and no \$c is used; **use tag 362.**

Examples:

260 \$aWashington, DC :\$bAARP
260 \$aS.I. :\$bs.n.
260 \$aChacago, IL :\$bs.n.

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)

- **JOURNALS ONLINE DO NOT HAVE a 300 tag.**

- If the journal is on CD or floppies then enter 300 tag per example below.
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 physical parts. **Works that are not yet complete, only the type of unit designation is recorded preceded by three spaces.**

Examples: **300 \$a3** CD-Roms ; **\$c4** in.
 300 \$a... CD-Roms ; **\$c4** in.

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) Absence or presence of \$b information is not important.

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

\$e- Accompanying material (NR). Associated physical description statements are enclosed in parentheses.

Punctuation:

- This subfield is always *preceded* by space plus sign (+)

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.

Examples:

310 \$aBimonthly <**NOTE:** 008 frequency and regularity would be set to “b” and “r” respectively for this type of 310 tag.

310 \$aMonthly (except July and Aug.) <**NOTE:** 008 frequency and regularity would be set to “m” and “n” respectively for this type of 310 tag.

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

Indicators:

1st 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.)**

\$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.

Example: 3620 \$aCoverage as of Oct. 2001

538 Tag required for system access note. See 538.

500 General notes. (R)

This tag can be repeated, but you may not repeat subfield \$a within the tag.

Punctuation:

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

Examples:

500 \$aTitle from screen

500 \$aSome issues have title: SLIS newsletter

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:

- 1st 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>

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

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

530 Additional physical form available (NR)

\$a Additional physical form available note (NR)

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

Example: 530 \$aAlso available in print.

538 System details note (R)

\$a System details note (NR)

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

EXAMPLE: 538 \$aMode of access: World Wide Web.

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.

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:

1st 0 = Forename

1 = Surname

3 = Family name

2nd indicator

4 = Source not specified

Appropriate subfields:

\$a Personal name (NR)

650 Topical Term. (R)

Indicators:

2nd 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:

2nd 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)

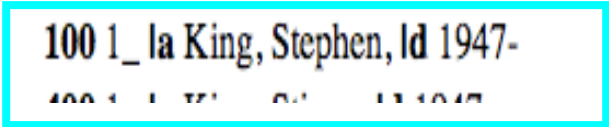
\$x General subdivision. (R)

\$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) **Use this tag to be able to search for issuing body noted in a 550 tag.**

Indicators:

1st 0 = Forename

1 = Surname

Appropriate subfields:

\$a Personal name (NR)

710 Corporate Name (R)

Indicators:

- 1st 0 = Inverted name
- 1 = Jurisdiction name
- 3 = Name in direct order

Appropriate subfields:

\$a Corporate name (NR)

730 Uniform Title (R)

Indicators:

1st 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)

856 Electronic Location and Access (R)

Indicators:

1st blank No information provided

4 HTTP

2nd blank No information provided

0 Resource

1 Version of resource

8 No display constant generated

\$u Uniform Resource Locator (NR)

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.