

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 nine (1)*

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 (Print) Template Instructions for Original Cataloging

January 2006

- An item is considered a periodical if it is issued in distinct parts, is numbered and has no pre-determined end. If an item does not match this definition, use a different template.
- If the serial has pages added or removed to keep it current, catalog as an Integrating Resource and use the Integrating Resource Template.

Do a title search for PERIODICAL (PRINT) 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		Entrd	031210
Dat_Tp:	c	Date1:		Date2	
Ctry:		Lang	eng	Mod_Rec:	
Source:	d	Frequ:		Regulr:	r
ISDS:		Ser_Type:	p	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 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
 YYYYMMDD

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 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

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): <Enter form if other than standard print. [See bulle 22 at above URL](#)

Form/item (Repr): <Enter form if other than standard print. [See bulle23 at above URL](#)

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

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.

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

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 of first issue or part or, lacking this, the title page of the earliest available issue or part. If there is no title page, use a title page substitute in the following order of preference: analytical title page, 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 the source used as a substitute title page in a 500 note field if the part used is not the chief source of information.

EXAMPLE: 500 \$aTitle from cover.

If a major change in the title proper occurs, create a new record. A major change is change in corporate issuing body, focus of the periodical, physical medium as well as major changes in wording. **If a minor change in the title proper occurs on a subsequent issue or part, give the later title in a note.** A minor change is going from an initialism to spelled out form or using an ampersand sometimes and other times "and".

EXAMPLE: 245 \$aAntiques

500 \$aIssues for Jan. 1928-July 1952 have title: The magazine antiques; issues for Aug. 1952-Feb. 1971 have title: Antiques; issues for Mar. 1971- have title: The magazine antiques.

If the title includes a date, name, number etc., that varies from issue to issue, omit this date, name, number, etc., and replace it with the mark of omission (ellipsis) unless it occurs at the beginning of the title.

EXAMPLE: 245 4\$aThe annual report of Governor ...

245 \$aFrommer's Washington, D.C. on \$... a day.

If an acronym or initialism of the title appears in the chief source of information with the full form of the title, enter the acronym or initialism as the other title.

EXAMPLE: 245 \$aReview of environmental educational developments
: \$bREED

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)

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

\$p Name of part/section of work (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.

EXAMPLE:

24500\$aTime.

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 :\$bYM.

24617\$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.

- local edition statements
Northern ed.
- 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.
- **If the place and / or the name of the manufacturer changes on a subsequent issue or part, give the later place in a 500 note if considered to be important.**
- **The only date that can be used in the 260 is the date of the very first issue. No other dates may be used. Use a 362 tag for the date when the date of first issues is unknown.**

\$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)

Date of first issue if available, otherwise there should be no \$c; use tag 362.

Punctuation:

- This subfield, when used, is always preceded by a comma (,)
- **Subfield c will always end with a mark of punctuation. If none is present provide a period.**

Examples:

260 \$aWashington, DC :\$bAARP <NOTE: No ending punctuation
260 \$aS.l. :\$bs.n., \$c1987-
260 \$aChicago, Ill. :\$b[s.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)

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) 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)

Size can vary per example below.

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 a space plus sign (+)

Example: 300 \$a v. ;\$c22-28 cm.
300 \$a v. :\$bill. ;\$c23 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.

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.

Examples:

3620 \$a1968-

3620 \$aVol. 1, no. 1 (Apr. 1981)-

3620 \$aVol. 1, no. 1 (Apr. 1983)-v. 1, no.3 (June 1983).

3621 \$aBegan with 1930 issue.

3621 \$aBegan with vol. 4, published in 1947.

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 cover.

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>

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 Statistice (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:

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.**

100 1_ la King, Stephen, ld 1947-

100 1_ 1 71 01 11 10 17

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)

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.