Call Number and Item Maintenance

Properties
Right Click on the **Call Number and Item Maintenance** wizard
Click on Properties
Click on the Defaults tab
Change the Library (if needed)
Set the Class Scheme to Dewey
Change the Item Type, Home Location, Price, Item category 1, Item category 2, and any other properties you need to change.
Click OK

Open the Wizard
Search for the Title using the **Catalog Search Procedures**
Once you find the correct title highlight it in the hit list (if you search by isbn you may receive only one title and it will take you to the correct screen)
Click on Modify
If you are adding a call number for you library click on Add Call Number
Change the Call number in the right side of the screen
Scan in the Item ID (you shouldn't need to make any changes to the item type, etc. if you set your properties).
Click Return to Search or Add Item if you have more than one copy of the same title.

You can attach your items to order records; a sample order record is attached.

If you have exhausted all possible searches and do not find the title you can create a brief title.

Search tips:

Keyword - locates and displays records that contain the terms you entered. (Indexes normally searched on keyword; Author, Contents, General, ISBN, ISSN, LCCN, OCLC, Periodical Title, PUB #, Series, Subject, Title).

Browse - produces a list in the alphabetic vicinity of the term you typed. The second item in the list—the closest match—will be highlighted, and from that point you can browse forward or backward in the list. (Indexes normally searched on browse; Call Number, Set ID, Title Control #. Indexes also searchable on browse; Author, Contents, General, Series, Subject, Title)

Exact - displays a single record of the search index you used. This option is best for specific number or code searches. (Indexes normally searched on exact; Item ID. Indexes also searchable on exact; Author, Call Number, Contents, General, Periodical Title, PUB #, Series, Set ID, Subject, Title, Title Control #) When using exact the system searches exactly what is typed, no variances are searched.

When searching titles that have **Boolean Operators or Positional Operators** it is best to put quotes around the operator or the entire title. (**Boolean Operators;** AND, NOT, OR, XOR) (**Positional Operators;** SAME, WITH, NEAR, ADJ)

You can use **Relational Operators** when searching in workflows. (**Relational Operators;** < less than, > greater than, = equal to, < > not equal to, <= less than or equal to, >= greater than or equal to)

When searching for a term put single quotes around the term, example 'American History'

When using a **Specified Entry** put the mark tag in brackets, example Dickens {100}

Stop Words can be left out (**Stop Words;** A, AN, AS, AT, BE, BUT, BY, DO, FOR, IF, IN, IT, OF, ON, THE, TO)

Substitution and Truncation - the symbols ? and $ to be used to represent substitution and truncation. Use the ? symbol as a substitute for a missing character in a search term. Use the $ symbol to truncate a search term. These two symbols can be used together or separately. These symbols may only be used at the middle or end.

Substitution example – wom?n, locates the appropriate records containing either "woman" or "women".

Truncation example - Jame$ in the search field, SirsiDynix Symphony locates records containing the terms: Jame, James, Jameson, and Jamerton.

Searching Numbers in a List - you must type a space between each number. SirsiDynix Symphony searches numbers separated by commas as if the numbers were not separated. For example, SirsiDynix Symphony searches 1,2,3,4,5 as a single term, but SirsiDynix Symphony searches 1 2 3 4 5 as 1 SAME 2 SAME 3 SAME 4 SAME 5. SirsiDynix Symphony searches 5000 and 5,000 as the same term.

Catalog Search Procedures

To avoid duplication of records, search as thoroughly as possible when adding items or records to the database. The three types of searches handle titles differently. If you do not find a title with one search method, please try other searches before deciding to send in packets or add records. Duplication of records costs the libraries time and money and creates unnecessary records in the database.

To add items: Open **Call Number and Item Maintenance** and set "Library" to ALL. The following is the preferred order of searching. If you cannot find a title, check what type of search you are doing (Keyword, Browse, Exact).

Preferred search is **ISBN** in **Keyword**.

Use **13-digit** form of the ISBN if it is available.
A search using 10-digit form will NOT find the 13-digit form.
The ISBN will **not** search in Browse or Exact.
If you do not find the ISBN in your search, make sure Type is set to Keyword.

Second choice is **Title** search in **Keyword**.

> **If title includes Boolean terms such as AND, NOT, OR, XOR, SAME, WITH, NEAR, ADJ place quotation marks around the Boolean term or the entire title to search properly.**
> Example: to search for *Bud, Not Buddy* use Bud "not" Buddy or "Bud not Buddy".

If ISBN and Title searches in Keyword do not produce results, try one or more of the following:

Author search in Keyword or Browse may be more effective if a title search produces too many entries.

Title + Author search: Click on "Advanced search." Icon is binoculars with yellow plus sign. Any search term may be used in "General."

Strategies for **one-word titles**: Search by Author. Use Advanced Search. Search by Title using Browse. Be aware that the Browse indexes are the least reliable and results do not always fall in expected alphabetical order. (Exact searches are unreliable for Title or Author and recommended only for title control and item id numbers.)

Strategies for **DVDs, etc.** that do not have ISBNs: Begin with Title search. Author search using name of director or lead actor. General search using UPC.

► Punctuation does not affect searching.

► In results list, click "Title," "Author," or "Pub. Year" to sort in descending order. Click twice to sort ascending.

Please exhaust all possible searches before adding a brief title.

Item Information and Maintenance
Add Brief Title

Properties
Right Click on the **Add Brief Title** wizard
Click on the Defaults Tab
Do not make changes to the Format or the entries without calling HLC first.
Put a check in Permanent
Change the Type, Library, Home Location, Class Scheme (set to Dewey), Item cat1, and Item cat2
Click OK

Open the wizard
Title info

020   **ISBN.** Required if available. ***Do not include dashes or spaces!*** If not available, leave blank. Do not substitute other standard numbers such as UPC for ISBN.
    For Books: *Look first at reverse of title page as source for ISBN*; prefer 13-digit version if printed on item. ***Do not use ISBN printed on outside cover*** unless none can be found inside the book.
    For cataloging packets: Mark ISBN used in brief record on photocopy or write on packet form.

099   Leave blank. May not appear in the form**.**

100   **Author's last name, Author's first name.** Capitalize first letters. ***Do not use all caps.*** Place a comma followed by a space between last and first name; end with a period. Leave blank if no author or editor is named on the item. If more than one author is named, enter the one listed first. For video recordings enter one of the following: presenter, lead actor, director, or production company.

245   **Title.** Prefer title page as source for books, disc or cassette label for media. Omit leading articles (a, an, the; el, la, los, las) unless part of a proper noun (The Woodlands, Los Angeles). Capitalize first letter of the title and proper nouns. ***Do not use all caps.*** End with a period.

590   **Type of item.** A note such as: Hardcover, Large print, Audio book on CD, Cass, DVD. (These are examples; any terms used locally may be used here.) Enter "Paperback" for paperback fiction records which will not be converted to full records.

490   **Series Title. (**May not appear in the form**.)** Copy from anywhere on the item. Follow instructions for **Title** above. If item is not part of a series, leave blank.

700   **Added Entry-Personal Name. (**May not appear in the form**.)** Optional. Add co-author or illustrator name. Follow instructions for **Author** above.

Call number and copy info
New call number: put in your call number (you will need to capitalize the call number)
If you set your properties all other fields should be correct
Scan in your **Item ID** (the scan automatically Adds the title)
Click Add Another Brief Title, Make More Changes or Close

For multi-part items such as sets, and for multiple copies, enter *ONE* brief bibliographic record. Attach all items to that same record.

If corrections to MARC record are needed, send e-mail to Ivon.Cecil@amarillolibrary.org (Include item ID and a note about what to correct.)

Once you have created the Brief Title you need to create a packet to send to the HLC office for cataloging.

Creating Packets for Books and Other Print Material

Step 1: Books—photocopy **title page or pages, copyright page** and, if present, **table of contents.**
The following information **must** be included; photocopy additional pages as necessary:
Title, subtitle, series title, author, publisher, publisher's location, date of publication/copyright, ISBN.

Periodicals—photocopy **cover** and **masthead.** The following information **must** be included; photocopy additional pages as necessary:
Title of publication, date of issue, volume and issue numbers, name and address of publisher, ISSN, frequency of publication.

Please make photocopies before placing labels or stickers on the item.

- If item is accompanied by a DVD, CD, cassette, etc., photocopy its label.
- If book is part of a series, photocopy a page on which the series title appears.
- If book has different ISBNs inside and on cover, photocopy both.
- If book has different titles on cover and title page, photocopy both.
- If book is a facsimile reprint, photocopy both original and new publisher information.

Step 2: Complete the "books or other print materials" packet form.

- Information which appears on the photocopies *and is readable* need not be entered on the form.
- For periodicals, the only entries necessary are SIZE and BRIEF RECORD information.
- If book has no ISBN, enter **"none"** on the form.
- If book does not have page numbers, enter "**unpaged**" on the form.
- The LAST NUMBERED PAGE is the last page with a printed page number, including acknowledgements, index, and other back matter. Exception: ignore advertisements.
- If book includes more than one sequence of numbered pages, enter the LAST NUMBERED PAGE of each sequence. (Example: A novel ends on page 262, followed by discussion questions on pages numbered 1 through 5. Enter on form: 262, 5.)
- Mark all applicable categories in ILLUSTRATIONS. Decorative graphics don't count as illustrations. "Pictures" includes drawings, paintings, and photographs. Mark "none" if and only if book contains no illustrations.
- Measure HEIGHT and WIDTH in **centimeters**. Fractions round **up** to next higher whole number. (Example: 23 ½ cm and 23 ¼ cm both round up to 24 cm.) If height of book is greater than width, you may leave WIDTH blank.
- If book is bilingual or in a language other than English, enter language information in NOTES.
- If item has no date, publisher, author or editor, say so in NOTES.
- If item is accompanied by a DVD, CD, cassette, or anything else, say so in NOTES.

Step 3: Complete Brief Record area on packet form.
- If a brief record is entered for the item, the BRIEF RECORD area must be completed. You may supply the item id by photocopying the bar code label instead of writing it on the form.
- If a brief record *is not* entered for the item, write N/A in the Item ID blank.

Creating Packets for Audiovisual Material and Software

Please make photocopies before placing labels or stickers on the item and/or container.

Information which appears on the photocopies *and is readable* need not be entered on the form.

If item has no ISBN, enter **"none"** on the form.

Container

Photocopy all surfaces of container with any text printed on them—back, front, sides, and edges.

Inserts

Publication information	Photocopy
Table of contents	Photocopy
Performer names	Photocopy
System requirements	Photocopy
Lyrics	Note on packet form in "Additional Material" area
Program notes	Note on packet form in "Additional Material" area
User instructions	Note on packet form in "Additional Material" area
Other material	Note on packet form in "Additional Material" area

Label

Audio books, other spoken word recordings:

Single titles on CD/cassette	Photocopy label of *one* disc/cassette from set
Multiple titles on CD/cassette	Photocopy label of one disc/cassette from each *title*
Playaway audio books	Photocopy label

Music recordings	Photocopy labels of *all* discs or cassettes in set
Other non-spoken sound recordings	Photocopy labels of *all* discs or cassettes in set
Video recordings	Photocopy labels of *all* discs or cassettes in set
Electronic games	Photocopy labels of *all* discs or cartridges
Computer software	Photocopy labels of *all* media

Creating Packets: OCLC Alternative

Search OCLC WorldCat for a bibliographic record that matches your item.

If you find more than one matching record, prefer the record with the most holdings or with most complete information.

Print the complete record. The **OCLC Accession No. must appear** in the print-out.

If you **do not set holdings** on a brief record in the HLC system, **and** the library name appears on the print-out, no packet form is necessary.

If **you do set holdings on a brief record** in the HLC system, attach the appropriate packet form. Fill in Library, Item ID, and Brief Record Control #. You may leave other areas blank. However…

If **information about PAGES and SIZE (for books) is missing** from the selected OCLC WorldCat record, fill in the entire packet form.

If **NUMBER OF DISCS or CASSETTES (for video and sound recordings) is missing** from the selected record, create a regular cataloging packet instead.

Sample Brief Order Record

Item Search and Display : Bibliographic Description : Title control number i9781849906197 07/10/2013

Fixed fields

Rec_Type:	a	Bib_Lvl:	m	Enc_Lvl:	5	Desc:	a	TypeCtrl:	
Entrd:	130614	Dat_Tp:	s	Date1:	2013	Date2:		Ctry:	|||
Lang:	|||	Mod_Rec:			Source:			Illus:			Audience:		
Repr:			Cont:			GovtPub:			ConfPub:			Festschr:		
Indx:			Fiction:			Biog:					

Bibliographic Information

key:	001	:	in501296369
Personal Author:	100 1	:	TBD
Title:	245 10	:	Doctor Who: Who-Ology
Publication info:	260	:	BBC Books 20130611
ISBN:	020	:	9781849906197 $19.99
ISBN:	020	:	184990619X $19.99
null:	947	:	|fsa|haps-book|ns1 nf%s parton request|oL130613SB|p19.99|q1|sOn-Order
Held by:	596	:	APL-EAST APL-SW

You may attach items to brief order records in the system, but you should still send a cataloging packet because the order for the item might be cancelled, leaving your holdings on a brief record that will not be upgraded.

Library _____

Complete for **books** or other **print materials**

Books: Attach clear, readable photocopies of **title page** and **copyright page**. (If DVD, CD, cassette, etc. accompanies book, include copy of **label**.) Add copies of cover or other pages if needed to show: **title, title variation, author, ISBN, publisher, place of publication, date of publication,** or **name of series.**

Periodicals: Enter SIZE only; attach clear, readable photocopies of **cover** and **masthead** (box or column stating notice of copyright, ISSN, publisher, address, etc.; also called indicia).

ISBN used in brief record_____

If title varies on cover/spine, attach photocopy OR write out and label (example: Tom Sawyer—spine)

_____ _____

PAGES: last numbered pre-page, if any (example: xii) _____

Last numbered page ("**unp**" if pages are not numbered) _____

Number of pages of plates, if any _____

ILLUSTRATIONS (mark all that apply):   **none**   **Color**   **B&W**

pictures (photos, drawings, etc.)   **map(s)**   **music**   **plans/patterns**   **genealogical tables**

SIZE in centimeters (*round to next higher whole number: 23 ¼ and 23 ½ both round up to 24*):

HEIGHT_____   WIDTH (if greater than height)_____

INDEX (mark answer that applies)   YES   NO

BIBLIOGRAPHICAL REFERENCES (mark answer that applies)   YES   NO

ACCOMPANYING MATERIAL (mark all that apply and include photocopy of label):

DVD   **Audio CD**   **CD-ROM**   **Other** _____

NOTES:

LOCAL CALL NUMBER (optional) _____

BRIEF RECORD: Item ID_____Original Title Control #_____

Library _____

Complete for **audiovisual material (sound recordings & visual materials)**

Attach clear, readable photocopies of the **label** on the item and all text on the **container**.

ISBN used in brief record (if any)_____

Audio book or other spoken-word sound recording (photocopy of only **one** label required)
    [ ] Sound disc (CD)   How many?_____

    [ ] Sound cassette   How many?_____

    [ ] Sound media player (i.e. Playaway)

    [ ] Other _____

Music or other non-spoken-word sound recording (photocopies of **all** labels required)
    [ ] Sound disc (CD)   How many?_____

    [ ] Sound cassette   How many?_____

    [ ] Sound media player (i.e. Playaway)

    [ ] Other _____

Video recording (photocopies of **all** labels required)
    [ ] Video disc—DVD   How many?_____

    [ ] Video disc—Blu-ray (BD) How many?_____

    [ ] VHS video cassette   How many?_____

    [ ] Visual media player (i.e. Playaway View)

    [ ] Other _____

Additional Material (book or booklet, flash cards, etc.—list and attach photocopies of title page, etc.):

Local Call Number (optional) _____

Brief Record: Item ID_____Original Title Control #_____

11

Library _____

Complete for **electronic material (video games** and **computer software)**

Attach clear, readable photocopies of **label** on the item, all text on the **container,** and information about **system requirements**.

ISBN used in brief record (if any)_____

CONTENT TYPE:

        Video Game   **Computer Software**

      Data   **Images**   **Other** _____

MATERIAL TYPE AND
NUMBER OF PARTS: Cartridge_____

                         CD-ROM _____

                         DVD-ROM_____

                         Other_____

ADDITIONAL MATERIAL (list and describe):

Local Call Number (optional) _____

Brief Record: Item ID_____Control #_____

Complete for **games.**

Attach *readable* photocopies of all text on container and instruction sheet(s).

Title on container_____

Variant title(s) and location(s)_____

Object of the game _____

_____

Manufacturer/Publisher_____

Item number_____UPC number_____Other number_____

Date (copyright or other)_____Edition_____Number of players_____

Age or grade level_____Language: Eng   Span   other_____

Size of container in cm: Length_____Width_____ Depth_____

Circle as many as apply:

   Type of container: cardboard box   plastic box   binder   other_____

   Type of contents: paper   cardboard   plastic   metal   other_____

Inventory of contents (include how many of each item):

Local Call Number (optional) _____

Brief Record: Item ID_____Control #_____