Bibliographic Manual

Standards and Examples of Cataloging Requirements for LION Consortium Member Libraries

Revised by the Bibliographic Manual Revision Subcommittee convened on October 25, 2018. Completed revision accepted by the LION Board on October 29, 2019
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MISSION STATEMENT

In keeping with the overarching mission of LION, we have agreed to adhere to the following protocols. These guidelines are designed to facilitate standardized cataloging in a cooperative environment. This committee recognizes that cataloging is a shared responsibility and that materials are not fully discoverable without quality cataloging. We also realize that high quality cataloging is vital for the maintenance of a high quality database. Our catalog strives to promote ease of access to all users and we believe that technical service is customer service.

GENERAL BIBLIOGRAPHIC RECORD GUIDELINES AND RULES

Records will be input according to current Library of Congress practices using MARC format and RDA standards.

I. Searching

In order to avoid creating duplicate records in the LION catalog, before creating or importing a new bibliographic record, conduct the following searches in order, proceeding to the next one whenever a match is not found:

- Title
- Standard number (ISBN, ISSN, etc.)
- Creator (author, artist, performer, etc.)

For graphic novel series that have numbered volumes, and certain nonfiction materials that are updated on a regular schedule, (ex. – travel books and testing books), locate and attach to the series bib record, rather than separate records for each volume or edition. If unable to locate a series record, please contact the LION cataloger who will assist in the creation of one.

If duplicate bib records are found in the catalog, report them to the LION cataloger by typing “m” in the ‘Bib Code 3’ field in all bib records involved.

If no match is found within the LION catalog, it is strongly suggested that catalogers create an Internal Search Record (ISR) bib record as described in Section III.2 below. Alternately, a remote search may be conducted.

Before a match is imported from the remote databases, ensure that all information in the bibliographic record applies to your item. If a cataloger is not sure they know how to bring outside records up to the standard, an ISR should be created instead.

II. What determines a match?

A match is found if the record in the database and the item in hand agree in ALL the following points:

- Creator(s) – 1XX, 7XX
- Title - 245
- Edition - 250

---

2 https://www.loc.gov/marc/bibliographic/
3 https://www.rdatoolkit.org/examples/
• Publisher & Date - 264
• Description (pagination/running time/number of discs, online resource, etc.; content; media; container – 3XXs

An item may be attached to a bibliographic record when an author writes under a pseudonym and the author’s name on the title page does not match the name in the 100 field.

Consider that you have a match if the only variation is one of the following:

• Description – Print items: |a exact match |c within 1 cm.
• Non-print items: |a exact match |c exact match
• A difference in the printing or copyright date – different binding or publisher/distributor acceptable if pagination, running time, etc., is a match.
• A minor variation in imprint, (Examples: “a division of...” , or “Harper Trophy”; “Recorded Books release of a Simon & Schuster audiobook”.
• Different ISBN is a match only if the pagination is the same or in the case of monographic serials.
  Examples:
  - Hardcover and trade softcover of the same novel
  - Annual copies of a travel book, or other annual book on a monographic serial record
  - Paw Prints/library binding editions.
• A difference in binding: Add the second ISBN if necessary, followed by a “|q” with binding type or year of publication.  Examples:  9780062797155|qedition|q(paperback); 9781598889796|qedition|q(2018)

Any tags that do not correspond to your item or information in red text should be removed or edited when importing or overlaying a record.

Item-specific information belongs in a library’s item record, not in the bibliographic record. Examples: “Viewing copy only”, “signed by author”, “missing booklet”.

Duplicate Records:

If duplicate bib records for the same item are present, they may be merged. Catalogers are encouraged to instead report them to the LION cataloger by typing “m” in the ‘Bib Code 3’ field in all the records involved, who will merge the records. Attach holdings to the best bib record.

III. Creating a new bibliographic record

If no match is found, create a new bib record.

Within MARC fields, the first subfield “|a” is not entered by the cataloger, as it is system supplied. The use of this subfield within this manual is for clarification purposes.

Records created in Sierra require the use of templates. LION has templates which may be copied and then edited to suit each library. Instructions for copying and editing templates are available here.
Items that require a separate bib record include, but are not limited to, the following: Each format should have its own bib record.

- Mass market paperbacks – dimensions and pagination vary greatly from hardcover/trade paperback.
- Audio books – discs, Playaways, etc. (Each has its own Sierra header material type.)
- Large print – Sierra header material type “l” (lower case L), 008 form item code “d”
- Music – disc, LP
- Video games – 538 system type (Examples: Xbox, Wii, PlayStation, etc.)
- Videos vs. Blu-rays

Be aware of Sierra header material types, as they determine scoping and icon display in the staff client and the online catalog.

Within MARC fields, the first subfield “|a” is not entered by the cataloger, as it is system supplied. The use of this subfield within this manual is for clarification purposes for data entry.

Types of new records
It is required that templates be used for new bib records. Templates may be created by catalogers or copied from LION templates and edited. Contact the LION cataloger for more information.

1. On-order Bib Records
These records are created in advance of the item being received by a library. These records allow staff to see which titles are on order and allow patrons to place holds. They may be supplied by vendors or created manually by a cataloger. Libraries that use the acquisitions module in Sierra create records called “order records” that are attached to these bib records. Other libraries may create “on-order item records” and attach them to show that they have the item on order.

Catalogers who are the first library to attach in-hand holdings to an on-order record must upgrade the record to either an Initial Search Record (ISR) or a full record.

If a bib record has no in-hand items attached after 6 months, LION will suppress the record, meaning it will continue to appear in Sierra but not in the OPAC. The first library to attach an item should unsuppress the record by changing the value in the ‘Bib Code 3’ field to a hyphen.

Fields required in an On Order Record:
- Sierra Header : Material Type - Required
- 035 – ocm0000000 – OCLC number - If available (Visit https://www.worldcat.org/ to search for OCLC records.)
- 02Xs – Required, if available
- 040 – xx [Two letter library code.] (Include “|d” in from of library code if creating a new record.)
- 100 – |a Required [One name/group name only. |e Required if available
- 245 – |a Required |b Required if applicable |c Required if available
- 250 – Widescreen, 2nd edition - Required if applicable and available
- 264 –|c Required if available
If an On Order record is created, catalogers must use the item location to allow holds to be placed. “xx” is the library’s two-letter code. Ex.: ‘nlooo’ is New London’s On Order location code.

2. Initial Search Records (ISRs)
The purpose of an ISR is to facilitate an OCLC search for a bib record to be imported by the LION cataloger when a quality record cannot be found in Sierra or the remote databases. A quality record is one that meets the standards in Section VI – Full Bibliographic Records, perhaps with some minor editing. If a cataloger is not sure that they know how to bring outside records up to the standard, create an ISR instead. LION encourages the use of an ISR.

ISRs are created from the item in-hand and additional information available from the publisher or vendor, and should include as many of the following fields as possible.

Note: When contacted by the LION cataloger, you may be required to upgrade an ISR that you created from an item in hand when a matching bib record is not located in OCLC by the LION cataloger, and is not present in the remote databases. Examples might be books or music CDs by local authors/artists, local history publications, and other uncommon items. See Full Bibliographic Records section for requirements.

Fields required for an ISR:
Ensure that the proper template for each format is used. LION has provided templates for this purpose. Consult with the LION cataloger for more information.

Indicators must be added when entering 1xx, 2xx, 4xx, 6xx, 7xx fields.

See http://www.loc.gov/marc/bibliographic/ecbdhome.html for more information.

Sample ISR

Instructions for expanding fields in Sierra are provided in the Appendix.
• Sierra Header
  - Language – Required, if not English
  - Cat Date – Leave blank. This is important because the LION cataloger uses the blank date to identify records in need of upgrading.
  - Bib Level – Required
  - Country – Required, if not United States
  - Material Type – Required

• MARC Leader :
  – Rec Type – Required - a=Language material, g= projected medium, i=nonmusical sound recording, j=Musical sound recording, etc.
  – 008
    – Audience
    – Form Item – Required for Large print = d or Braille = f
    – Lit Form
  – 02X – ISBN, ISSN, Publisher Number, other Standard Number such as UPC - Required if available
    This number is used by the LION cataloger to import matching record from OCLC. If this number is present, catalogers may omit tags below 3XXs.
  – 040 – |dxx [Two letter library code.] Omit “ |d” before library code if creating a new bib record.
  – 1XX – |a Required, except for films (One name/group name only.) |e Required. Must be verified.
  – 245 – |a Required |n required if applicable |p required if applicable |b required if applicable |c required
  – 250 – Required if applicable
  – 264 – |b Required |c Required
  – 300 – |a Required |b Required if applicable |c Required |e Required if applicable

The following tags are required if no OCLC number is present:

• 336 – Required
• 337 – Required
• 338 – Required
• 511 – Performer note required for classical music recordings, encouraged for DVDs/Blu-rays.
• 538 – System details - Required if applicable – Compact disk, Blu-ray, DVD, Wii, etc..
• 5xx – Notes are encouraged

3. On-the-Fly Items
These are items found on the shelf that have no record in the catalog or temporary records (such as non-LION ILLs,) used to check out non-LION materials. These records are typically created at the Circulation desk.

An “On-the-Fly” template must be created, and libraries are encouraged to customize the bib and item record fields for local use.

• Use Sierra Header Cat. Date of “09-10-2006”, which excludes these temporary records from the LION Cataloger’s workflow.
• Use Bib Code “n” = Suppress
• Bib and Item record information should be in ALL CAPS.
• Ensure that a message is added to the Item record for the material to be sent to Tech. Services/ILL staff when returned. The “On-the-Fly” item (and bib) record would then be deleted and the item catalogued, if desired.
4. Homegrown or Local Interest Materials

Examples of these materials might be equipment, unique archival or historical items, book discussion sets, or kits.

Catalogers may judiciously use a Sierra Header Catalog Date of “09-10-2006” in new bibliographic records where the materials being cataloged have unique qualities which would preclude the LION Cataloger’s search for full records. It is the responsibility of the local cataloger to ensure that these bib records meet the standards under “Kits” in Section VI.

IV. Item records

Once a bibliographic record has been created and saved it must have an item or order record attached. LION will periodically run a clean-up program to delete records that have no items or orders attached.

The first library with the item in-hand that attaches to, or edits, an item record on an On Order or ISR bib record is required to upgrade that record to meet ISR or Full Record standards by entering information from the item in hand.

Sample item record

- Copy No. – Optional. Local use, if desired
- Item Codes 1 & 2 – Optional. Local use, if desired
- Item Type – Required. This field, along with Location code, and patron code (patron who checks out item) contribute to the determination of the Loan Rule used for the transaction. Consult LION for more information about Loan Rules.
- Price – Recommended. Default is based on the loan rule when price is not present.
- Location – Required
- Status – Required. Typically “r” = In Processing, at the time of cataloging.
- Item Message – Optional. Local use, when desired.
- Item Agency – Required.
- Call Number – Required. Information such as season or series may be added to this field, rather than the volume field on a non-serial record. (Ex.: “Series J Fic Harry #3”) See “Volume”, below.
• Barcode – Required
• Volume - Should only be used when multiple items are on the same bib record and require differentiation from each other. Use of this field forces patron-placed PIKA holds to be placed on a specific item. Examples include encyclopedia sets (“4 C-Cr”), travel books on a serial record (“2018”, “4th ed.”), one season of a TV series in multiple cases (“Discs 4-6”), and manga (“27”).
• Message – Optional. Text in this field appears in a pop-up window when item record is accessed at check-in, check-out, etc., in Sierra. Useful for reminders on number or nature of items present or notes on format. Examples include “Check for 6 discs”, “Missing leaflet”, “Blu-ray – will not play on regular DVD player”.
• Internal Note – Optional. Text in this field is visible only when Item Record is opened fully in Sierra. Often used for notes about the item not necessary for each transaction, such as purchasing source/donation, collection names, mending dates, “Replacement disc added on [date] at 36 circs.”, or “Autographed by the author”.

Sample item record for an item on order
Sample item record: travel book on a monograph record
Sample item record: travel book on a serial record
Sample item record: graphic novel on a serial record
Sample item record: part of a season of a TV show

V. Editing bibliographic records

When editing a bibliographic record, add your library’s two-letter code to 040|d.

Reasons to Edit:

- Correcting misspellings
- Adding performers, along with relator codes
- Changing the title and subtitle when the “item-in-hand” differs from information present in an ISR or On Order bib record for that item.
- Adding missing information, such as additional ISBNs in 020, 3XXs, 505 – Formatted contents, 520 – Summary note, and/or other 5XX notes, 7XXs - added authors, etc.
- Adding other pertinent information
VI. Full bibliographic records

All new or imported records must meet the following guidelines.

When adding new holdings to pre-RDA records (generally for items published before 2013,) which are already present in Sierra, catalogers should edit the bib record to meet these standards. Editing is encouraged to improve the quality and utility of the catalog.

Within MARC fields, the first subfield “|a” is not entered by the cataloger, as it is system supplied. The use of this subfield within this manual is for clarification purposes.

Use square brackets around any information taken from a source outside the resource itself, such as a publisher website or when estimating place or date of publication when unavailable.

Note: When contacted by the LION cataloger, you may be required to upgrade an ISR that you created from an item in hand when a matching bib record is not located in OCLC by the LION cataloger, and is not present in the remote databases.

Examples might be books or music CDs by local authors/artists, local history publications, and other uncommon items.

Please see the Library of Congress MARC Standards for full cataloguing explanations and examples.

4 http://www.loc.gov/marc/bibliographic/
**Required fields: Books**

### Sample full bib record for a book (juvenile picture book)

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Author</td>
<td>Lang, Suzanne</td>
</tr>
<tr>
<td>Title</td>
<td>Grumpy monkey /by Suzanne Lang ; illustrated by Max Lang.</td>
</tr>
<tr>
<td>Description</td>
<td>1 volume (unpaged) ; color illustrations ; c26 cm include pagination even for unnumbered pages</td>
</tr>
<tr>
<td>Note</td>
<td>Jim Panzee wakes up in a bad mood one beautiful day, but he keeps denying he is grumpy even as his friends notice.</td>
</tr>
<tr>
<td>Note</td>
<td>AD460L Lexile Lexile Reading level</td>
</tr>
<tr>
<td>Subject</td>
<td>Mood (Psychology) ; Juvenile fiction.</td>
</tr>
<tr>
<td>Subject</td>
<td>Chimpanzees ; Juvenile fiction.</td>
</tr>
<tr>
<td>Subject</td>
<td>Animals ; Juvenile fiction.</td>
</tr>
<tr>
<td>Subject</td>
<td>Friendship ; Juvenile fiction.</td>
</tr>
<tr>
<td>Subject</td>
<td>Mood (Psychology) ; Fiction.</td>
</tr>
<tr>
<td>Subject</td>
<td>Chimpanzees ; Fiction.</td>
</tr>
<tr>
<td>Subject</td>
<td>Animals ; Fiction.</td>
</tr>
<tr>
<td>Subject</td>
<td>Friendship ; Fiction.</td>
</tr>
<tr>
<td>Subject</td>
<td>Picture books ; Fiction.</td>
</tr>
<tr>
<td>Added Author</td>
<td>Lang, Max ; d1998 ; Illustrator.</td>
</tr>
</tbody>
</table>
Sierra Header

- Language – Required
- Cat Date – Required
- Bib Level – Required

-Bib Code 3 – Use as necessary
  - m = multiples: place in all duplicate records for the exact same item, LION cataloger will merge these records. Attach your item to the best record.
  - n = suppress: suppresses from PIKA, but bib record is still visible in Circulation. Use for ILLs, test, and local records.
  - p = priority: use for records created for an item in hand, that are more than a 3 months old, and that need upgrading by the LION cataloger.

- Country – Required

- Material Type – Required. (Examples: book = a, LP = l, Braille = h.)

MARC Leader

- Rec Type – Required - a = Language material
- Cat Form – Required - i (ISBD punctuation included = Conforms to our standards of punctuation)

007 – This field may not automatically appear. If it is not present, add the correct code in the MARC Leader Rec(ord) Type, then open the 007 (CTRL+R or right click), close it, and reopen to edit this field.
008 – This field may not automatically appear. If it is not present, add the correct code in the MARC Leader
  – Rec(ord) Type, then open the 008 (CTRL+R or right click), close it, and reopen to edit this field.
  Dat Type
  – Date(s)
  – Country
  – Audience
  – Illustr(s) - Use as many as necessary
  – Form Item – Required. [d = Large Print, f=Braille, etc.]
  – Content(s) – “Up to four one-character codes that indicate whether a significant part of the item is or
    contains certain types of material” (Library of Congress)\(^5\).
  – Index
  – Lit Form - Specificity is encouraged.
  – Government publication, Conference publication, Festschrift, and Biography should be used when
    these apply to the item being cataloged.

010 – LoC number - Required if available

02X – ISBN, ISSN, Publisher Number, other Standard Number such as UPC - Required if available

  -Remove ebook ISBNs or others that do not pertain to this item.
  -Remove pricing information in this field.
  -Use “|q” for volume numbers and binding, with the latter information contained within parentheses.
  -Add ISBN and edition/volume number for monographic serials, such as travel books, Petersons guides,
    graphic novels, etc.

Examples: 9780062797155| qedition| q(paperback); 9781598889796| qedition| q(2018)

035 – ocm00000000 – OCLC number – Required, if available. May be obtained at Worldcat.org.


  Omit “|d” but include library code, if cataloger is creating new record from item in hand.

084 – Remove BISACSH codes if present

092 – Remove if present

1XX - |a Required, when applicable ,|e Relator code(s) Required. See list of relator codes at

  Note: A comma should be used before “|e” typically. The exception occurs when an open date is used, such as
  with Stephen King, in the example below.

  Only one name/group name should be present in this field. Additional creators belong in 7XXs, and must be
  verified.

\(^5\) https://www.loc.gov/marc/bibliographic/concise/bd008b.html
Not all names have an authority record. Authority records are used to differentiate between authors of the same name. **It is important that you have the correct authority record for that work's author.**

Examples: 100 1 Stone, Melicent, |eauthor, |eillustrator.

100 1 King, Stephen. |d1947- |eauthor.

245 ## – Both indicators required |a Required |b Required if applicable |n required if applicable

|p required if applicable |c required
Include a period after the |c field if there is a 490 field included in the bib record.

Catalogers are responsible for proper capitalization and punctuation of titles. First word of title and proper nouns should be capitalized.

246 – Use judiciously when title contains symbols, numbers, alternate titles on package or cover. Do not include initial articles. Do not use this field for title “keywords”.

250 – Required if applicable

264 01 – |a Required |b Required |c Required

Second 264 04 - |c Required if copyright differs from publication OR to convey distribution information

**First indicator** = Sequence of statements: **blank #** Not applicable/No information provided/Earliest 2
Intervening 3 Current/latest

**Second indicator** = Function of entity: 0 Production, 1 Publication, 2 Distribution, 3 Manufacture Statements and 4 Copyright notice date


Use only as last resort if a piece of information is not available on item, packaging, website, etc.:

|a [Place of publication not identified] : |b [publisher not identified], |c [date of publication not identified]

300 ___ |a Required |b Required if applicable |c Required |e Required if applicable

**Omit the terminal period at the end of the field, unless using an abbreviation, such as “in.”.**

**Metric measurement units are symbols, not abbreviations, and do not need a period after them.**

Examples:

Large Print: 510 pages (large print) ; |c23 cm

xxiii, 178 pages : |bcolor illustrations ; |c21 cm
1 volume (unpaged) : color illustrations ; c24 cm
xi, 819 pages, 32 pages of color plates : illustrations ; c24 cm
xiii, 258 pages, 16 unnumbered pages of plates : illustrations (chiefly color) ; c24 cm

3XX - Required

Note: Multiple sets of 33Xs may be necessary for items comprising multiple types of media, such as a book with CD. This does not apply to library-created kits, such as a bag of books with toys.

- 338 – Required http://www.loc.gov/standards/valuelist/rdacarrier.html

Examples for book:
336 text|2rdaccontent
337 unmediated|2rdamedia
338 volume|2rdacarrier

BOOK WITH CD included

Typically, CD is placed in pocket attached to book.

300 __ 218 pages : color illustrations ; c23 cm + e1 CD-ROM (12 cm)
OR 300 __ 218 pages : color illustrations ; c23 cm + e1 sound disc (12 cm)
500 __ Accompanied by a CD.

BOOK WITH DVD included

Typically, DVD is placed in pocket attached to book.

300 __ xv, 223 pages ; c24 cm + e1 videodisc
OR 300 __ xii, 210 p. : illustrations ; c26 cm + e1 videodisc (DVD : sound, color; 12 cm)
500 __ Accompanied by a DVD.

490 - |a Required if applicable |v Required if available (See item in hand or author website.)
There is no period after the 490 field and it is transcribed exactly as it appears on the item, similar to a 245 |c field.

Must be verified and indicators need to be used. An 800 field often must be completed, as well. Indicators: 490 1_ = 800 present (In the rare cases where no 800 is used with the 490: 0_) See guidelines at https://www.loc.gov/marc/bibliographic/bd490.html.

Note: 490 is not an indexed field, but 800 is indexed.

Series that are traced have a 490 with a first indicator of 1 and a corresponding 8XX.

Ex. 490 1_ Hitchhikers trilogy ;|vbk. 4

Series that are not traced have only a 490, with a first indicator of “0”, and no 8XX.

Ex.: 490 0_ Thorndike Large Print Books

5xx – Notes are encouraged

Formatted contents: 505 0_ |gv. 1|t It creeps! -- |gv. 2|t The real bargain -- |gv. 3|t Tell no one!.

The use of “|t” allows title searching for songs, short stories, novellas, poems, films, etc., in anthologies or items with multiple films, novels, etc. in one volume.

Use “|g” in front of non-filing characters to enhance discovery: 505 |g The |t flight -- |g The |t child -- |g The |t porpoise -- |g The |t family.

Table of contents: 505 0_ Essential equipment for baking -- Essential ingredients for baking -- Cookies -- Cakes -- Pies and tarts -- Breads -- Toppings and fillings.

Summaries: 520 – Summaries are encouraged.

65X – Required

Common subject/genre headings: Must be verified (see Appendix) and indicators used.

650 _0 American poetry.
650 _0 Short stories, American.
650 _0 Board books.
650 _0 Graphic novels.
655 _7 Love stories.|2gsafd
655 _7 Urban fiction.|2local
655 _7 Mystery fiction.|2gsafd
655 _7 Western stories.|2gsafd
655  _7 Science fiction. |2gsafd
655  _7 Fantasy fiction. |2gsafd
655  _7 Humorous fiction. |2gsafd
655  _7 Suspense fiction. |2gsafd
655  _7 Romantic suspense fiction. |2gsafd
655  _7 Horror fiction. |2gsafd
655  _7 Historical fiction. |2gsafd
                   655  _7 Christian fiction. |2gsafd
                   655  _7 War stories. |2gsafd

7XX – |a Required, |e Required  [Must be verified.]

Other common relators: adapter colorist compiler contributor editor
Full list: http://www.loc.gov/marc/relators/relaterm.html

8XX - |a Required; |v Required (See item in-hand or author website.)

Used when a 490 tag is present. Must be verified.

Note: 800 is an indexed field, but 490 is not indexed.

8XX fields end with a period and must be verified through authority control, much like a 100 field.

Ex.: Series 800 1_ Hunter, Erin. |tWarriors, omen of the stars ; |v#1.

Ex.: Series 830 0 Teachings of Merlin ; |vbook 1

Use an 8XX field with a first indicator of 1 if all titles in the series are by the same author.

Ex. 490 1_ Maze Runner series; |vbook 4

800 1_ Dashner, James, |d1972- |tThe Maze Runner series; |vbook 4.

Use an 830 for series written by different authors. The first indicator is always blank and the second indicator represents non-filing characters.
### Required fields: Large Print

**Sample Large Print bib record**
Key tags for Large Print items:

- Sierra material type: l [lowercase L]
- MARC leader material type: a
- 008 Form of Item: d
- 020 |a9781432867126|q(large print)
- 300 vii, 605 pages (large print) ;c23 cm
### Serials

**b24933508**

- **Last Updated:** 08-21-2019
- **Created:** 09-27-2016
- **Revisions:** 19

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### MARC Leader

#### Locations

- br
- gu
- hm
- lg
- os
- or
- wa
- ws
- wd

#### Standard No.

- **020**
  - 164097136X(q(2019))
- **020**
  - 9781640971363(q(2019))
- **020**
  - 9781101878970(q(2017))
- **020**
  - 1101878974(q(2017))
- **022**
  - 2470-9409/21

**ISBN for each volume attached**

**ISBN for series**

**Misc.**

- 005: 20160923013635.0
- 008: 160219 c 2016 9999 nyu g x

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<td>Description</td>
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<td>Added Author</td>
<td>Fodor's Travel (Firm)</td>
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</table>

**i57423416**

**ISBN for each volume attached**

**ISBN for series**

LION Bibliographic Manual| 26
Serials are sets of publications having a common name, issued more or less at regular intervals, and intended to continue indefinitely. Conversely, monographs are independently published self-contained units. They are complete at the time they are issued or are to be issued in a known number of parts, such as a novel.

In LION, serial records are used for magazines and for series of books that are continued regularly under the same title and includes many (but not all,) reference works, travel guides, and graphic novel series.

- Search by title, then keyword if necessary.
- When cataloging a new edition on a serial record, add the ISBN to the bib record and volume number/edition/date to the item record’s volume field.
  Ex.: 020__ 9780738535593|q(2019)
- For serials not found in the LION catalog, catalogers should create an ISR and the LION cataloger will search for a full bib record.

World language items

When cataloging materials in a world language, catalogers should follow the same LION rules and guidelines previously stated in this manual. The use of templates with foreign language fields and codes already in place is highly recommended. LION also recommends the use of Google Translate as a cataloging tool.

Fields of importance include:

- 041 1 spa|heng
- Added Title 240 10 Paper towns.|lSpanish.
- Title 245 10 Ciudades de papel /|cJohn Green ; traducción de Noemí Sobregués.
- Note 546 __ Text in Spanish
- Subject 650 _1 Spanish language materials
### MARC Record

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<td>Note</td>
<td>546</td>
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<tr>
<td>Note</td>
<td>520 Reyna Grande tenía nueve años cuando cruzó la frontera de México y los Estados Unidos buscando un embarazo, lo que encontró fue a una madre indiferente y a un padre alcoholico y violento, en un país que salir adelante y lograr lo que parecía imposible: ser la primera persona en su familia en asistir a la universidad. Contra viento y marea, Reyna convirtió su condición de inmigrante indocumentada a escuchadas (Sandra Cisneros, autora de La casa en Mango Street). Narrada con esa prosa que siempre había anhelado: un hogar duradero.</td>
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<td>Subject</td>
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Multilanguage Items

These are items that contain 2 or more languages, such as a picture book with both Spanish and English text.

Fields of particular interest include:

- **041 0_eng|aspa**
- **Title 245 10 Maisy’s toys=|bLos juguetes de Maisy |a Maisy dual-language book/|cby Lucy Cousins.**
- **Title 246 31 Juguetes de Maisy.**
- **Note 546 Parallel text in Spanish and English = Textos paralelos en espanol e ingles.**
- **Subject 650 -1Spanish language materials.**
- **Subject 655 -0Spanish language materials |xBilingual |vJuvenile literature.**
Translations

Not required for works in their original non-English language.

- Uniform Title: 130 [0-9 non-filing]_a Required || Required (See Library of Congress guidelines\(^6\).)
- Title: 245 10 La búsqueda de un sueño :|buna autobiografía /|cReyna Grande ; traducido por Victor Uribe.
- Note: 546 __ Spanish text.
- Subj. 650 _1 Spanish language materials.

Required fields: AV records

Note the differences between the following Form Item codes within the 008 for AV materials:

- \(=\) Online: “The resource is accessed by means of hardware and software connections to a communications network” (Library of Congress\(^7\)). Examples: Streaming or downloadable resources such as Overdrive and Hoopla. These materials are not currently cataloged in Sierra.

- \(q\) = Direct electronic: “Storage on a directly accessible tangible recording medium” (Library of Congress\(^8\)), e.g. disc, tape, Playaway device, flash drive, portable hard drive, etc.” Examples: music CD, tangible audiobook, DVD, Blu-ray, documents on a flash drive.

- \(s\) = Electronic: “Intended for manipulation by a computer. The item may reside in a carrier accessed either directly or remotely, in some cases requiring the use of peripheral devices attached to the computer (e.g., a CD-ROM player). This code is not used for items that do not require the use of a computer (e.g., music compact discs, videodiscs)” (Library of Congress\(^9\)). Examples for use: software and video games.

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\(^6\) https://www.loc.gov/marc/bibliographic/bd130.html
\(^7\) https://www.loc.gov/marc/bibliographic/bd008x.html
\(^8\) https://www.loc.gov/marc/bibliographic/bd008x.html
\(^9\) https://www.loc.gov/marc/bibliographic/bd008x.html
Sample bib record for an audiobook
• Sierra Header:
  - Language – Required
  - Cat Date – Required
  - Bib Level – Required
  - Bib Code 3 – Use as necessary
    m = multiples: place in all duplicate records for the exact same item.
    LION cataloger will merge these records. Catalogers should attach their item to the best record.
  - Country – Required
  - Material Type – Required – “l” = CD, “5” = Playaway, “x” = cassette

• MARC Leader:
  - Rec Type – Required - l = nonmusical sound recording
  - Bib Levl – Required – m=monograph
  - Cat Form – Required - i = ISBD punctuation included

• 007: This field may not automatically appear. If it is not present, add the correct code in the MARC Leader Rec(ord) Type, then open the 007 (CTRL+R or right click), close it, and reopen to edit this field

• 008: This field may not automatically appear. If it is not present, add the correct code in the MARC Leader Rec(ord) Type, then open the 008 (CTRL+R or right click), close it, and reopen to edit this field

  - Dat Type – Required = s (or other appropriate code)
  - Date One – Required
  - Date Two – Use as necessary
  - Country – Required
  - Audience – Required
  -FormItem – q=direct electronic (CD)
  - LitText1 – Encouraged
  - Language – Required

• 010 – LoC number - Required if available

• 02X – ISBN, ISSN, Publisher Number, other Standard Number such as a UPC - Required if available
  - Remove ebook ISBNs or numbers for any other formats that do not pertain to this item.
  - Remove pricing information in this field.
  - |q Required for binding information, with the information entered contained within parentheses.
    Ex.: 9780062795250|q(hardcover) OR 9780241358429|q(2019)

• 035 – ocm0000000 – OCLC number – Required, if available. May be obtained in Worldcat.org.

• 040 – |dxx [Two letter library code.] Required.
  Omit “|d” but include library code, if cataloger is creating new record from item in hand.

• 084 – Remove BISACSH codes if present
• 092 – Remove if present

• 1XX - |a Required, when applicable, |e Relator code(s) Required
  Ex.: 100 1 Stone, Melicent, |a author.
  Only one name should be present in this field. Additional creators, such as narrators, belong in 7XXs. Must be verified.

• 130 - |a Required for translations |l Required for translations

• 245 ## – Both indicators required |a Required |b Required if applicable |c required
  Include a period after the |c field if there is a 490 field included in the bib record.
  Catalogers are responsible for proper capitalization and punctuation of titles. First word of title and proper nouns should be capitalized.

• 246 – Use judiciously when title contains symbols, numbers, alternate titles on package or cover. Do not include initial articles. Do not use this field for title “keywords”.

• 250 – Required if applicable

• 264 01 – |a Required |b Required |c Required

• 264 04 – |c Required if copyright differs from publication date or for distribution information.

• 300 – |a Required |b Required if applicable |c Required |e Required if applicable
  Ex.: 300|a3 audio discs (approximately 3 hr.) |c12 cm
  Note: “4 ¾ in.” is acceptable in place of “12 cm”. Under RDA, “in.” uses a period, though “cm” does not.

• 336 – Required |a as spoken word |2rda content

• 337 – Required |a audio |2rda media

• 338 – Required |a audio disc |2rda carrier

• 344 – Encouraged |a digital |2rda

• 347 – Encouraged |a audio file |2rda |b CD audio

• 511 0 # - Required
  EX.: “Narrated by David Chandler.”

• 520 – Required

• 538 – Encouraged.
  EX.: Compact disc. Do not use a general note (500) for system details.

• 6XX – Required.

• 700 1 _ Required for narrators or other contributors.
  EX.: Chandler, David, |e narrator.
## PLAYAWAY

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| 530 | When the Flemings, designer Helene and architect Daniel, move into a remote community in the north of Shetland, drawings of a galleon and a hanged man. Gossip spreads like wildfire. A story of dysfunctional families and fractured

### Subject

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Fields of importance for Playaways:

- Sierra Header - material type = 5
- MARC Leader - Material type = i
- 100 1 Cleeves, Ann, |eauthor.
- 300 1 audio media player (630 min.) |bdigital, HD audio ; |c3 3/8 x 2 1/8 in. [or metric measurements]
- 336 spoken word |bspw |2rdacontent
- 337 audio |bs |2rdamedia
- 337 unmediated |bn |2rdamedia
- 338 other |bsz |2rdacarrier
- 338 other |bnz |2rdacarrier
- 344 digital |bnon-volatile flash memory |2rda
- 347 audio file |bACELP |2rda
- 511 0_ Read by Kenny Blyth.
- 500 Issued on Playaway, a dedicated audio media player.
- 700 1_ Blyth, Kenny, |enarrator.
**MUSIC CD**

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</table>

**Publication Info.**

| Publication Info. | 254 | 1 [Nashville, :Big Machine, ] [2018]  |

**Description**

| Description | 300 | 1 audio disc (41 min., 52 sec.) : CD audio, stereo : 4 3/4 in.  |
| Description | 306 | 004152.  |
| Description | 336 | performed music  |
| Description | 337 | audio:itemId:medium.  |
| Description | 338 | audio disc:vol:acid:carrier.  |
| Description | 344 | digital:optical:stereo:media.  |
| Description | 347 | audio file:zeta.  |
| Description | 347 | bCD audio.  |

**Note**

| Note | 500 | Title from disc label.  |
| Note | 511 | Performed by Sugarland ; featuring: Taylor Swift.  |
| Note | 518 | Produced by Kristian Bush, Jennifer Nettles and Julian Raymond.  |
| Note | 518 | Recorded at Blackbird Studios, Nashville, TN.  |
| Note | 538 | Compact disc.  |
| Note | 500 | Lyrics in booklet inserted in container.  |

**Note**

| Note | 525 | On a roll (3:01) --(Let me remind you)(3:45) --(Shake it)(3:49) --(Still the same girl)(3:39) --(Lean it on back)(3:15) --(Not the only girl)(4:54).  |

**Contents**

| Subject | 625 | Popular music.  |
| Added Author | 700 | Swift, Taylor.  |

---

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Music CD Fields of importance include:

- Sierra Header Material Type – Required. j=Musical sound recording
- 007: Mat Catg = s; Spec Mat = d; Speed = f; ConfPlay (double click in field and select from list); Groove W = n; Dimens = g; TapWidth = n; TapeConf = n; KindDisc = m; KindMat = m; KindCut = n; SP Char = e; Cap/Stor = d.
- 008: Dat Type = t; Date One = [year of publication]; Country (select from list); FormComp (select from list); Format = n; MusicPts = n; AccMat1 (select from list); Trans/aff = n; Language (select); Cat Srce = d.
- 024 1 _ UPC (Universal Product Code, 12 digits, usually found as a barcode)
- 028 0 2 Publisher number
- 100 1 Stone, Melicent, |eperformer or e|composer Full list: http://www.loc.gov/marc/relators/relaterm.html
- 245 Title and statement of responsibility as printed on disc.
- 264 _1 Publication information. If year of publication appears on the item only as a copyright or phonogram date, put in brackets in 264 _1 subfield |c.
- 264 _4 |cCopyright date (“c2018”) or phonogram date (“p2018”), when differs from Publication Date.
- 300 1 audio disc ;|bdigital ;|c12 cm
- 336 performed music|bprm|2rdacontent
- 337 audio|bs|2rdamedia
- 338 audio disc|bsd|2rdacarrier
- 538 Compact disc. (Do not use a general note (500) for system details.)
- 650 Subject
  
  Common Subject/Genres:
  650 _0 Rock music|y2001-2010.
  650 _0 Rock music|y2011-2020.
  650 _0 Rap (Music)
  650 _0 Popular music.
  650 _0 Rock music.
  655 _0 Motion picture soundtracks.
  655 _0 Television soundtracks.
### DVD & BLU-RAY

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#### Title

**Uniform Title**

**Title**

130 00 Affair (Television program), 6 seasons 4.

245 04 The Affair. 6 seasons four / Showtime presents ; created by Sarah Treem & Hagai Levi.

#### Note

- Special features: Sink back into the ocean; Character profiles.

#### Subject

- 650 0 Adult men > New York (State) > New York City > Drama.
- 650 0 Murder investigation > New York (State) > New York City > Drama.
- 650 0 Adult men > California > Los Angeles > Drama.
- 650 0 Murder investigation > California > Los Angeles > Drama.
- 655 7 Television series > 2 legth.
- 655 7 Drama > 2 length.
- 655 7 Romance television programs > 2 length.
- 655 7 Thrillers (Television programs) > 2 length.
- 655 7 Fiction television programs > 2 length.
- 655 7 Video recordings for the hearing impaired > 2 length.

#### Added Author

- 700 1 Treem, Sarah > creator.
- 700 1 Levi, Hagai > creator.
- 700 1 Jackson, Joshua > creator.
- 700 1 Tierney, Maura > creator.
- 700 1 West, Dominick > creator.
- 700 1 Wilson, Ruth > creator.
- 700 1 Teles, Julia Goldani > creator.
- 700 1 Sand, Jadon > creator.
- 700 1 Sandino Moreno, Catalina > creator.
- 700 1 Mowaffy, Omar > creator.
- 700 1 Latham, Sanaa > creator.
- 700 2 Showtime Networks, presenter, publisher.
- 700 2 Paramount Home Entertainment (Firm) > distributor.

Blu-ray and DVD (including HD DVD) are different formats of video discs. They are treated as separate material types and have different icons visible in Sierra. Catalogers should ensure that they are using the correct bib record for the item being cataloged.

When an item contains both Blu-ray and DVD discs, catalogers may choose to separate the items and attach them to the correct individual format bib records, or to use a combo bib record, which, by default uses the DVD material type. The format would then be reflected in the item records. Two sets of 3XX fields would be required in this case, one for each type of disc.

Fields of importance unique to DVDs include:

- **Sierra Header:** Material Type – Required  
  g = DVD  3 = Blu-ray
- **007:** Mat Ctg – v = videorecording, Spec Mat - d = videodisc, Format – v = DVD  s = Blu-ray, SoundSep – a = sound on medium, MedSnd – typically i= videodisc, Dimens – z = other, ConfPlay – Required.
- **008:** Run Time – Required, FormItem – q = direct electronic (See note on this field at beginning of Required Fields: AV Records section.) Type Mat – v = videorecording, Technique – Required, Language – Required
- **130** - |a Required for TV series & to differentiate between film remakes |n Required for TV series  
  (See TELEVISION SERIES and MOVIES sections below.)
- **300** 2 videodiscs (approximately 91 min.) ;|c12 cm
- **DVD/Blu-ray with booklet:**
  1 videodisc (90 min.):|bsound, color ;|c12 cm. +|e1 booklet (18 pages :|bcolor illustrations ;|c21 cm)
- **336** two-dimensional moving image|2rdacontent
- **337** video|2rdamedia
- **338** videodisc|2rdacarrier
- **538** – Required. Do not use a general note (500) for system details.  
  Ex.: _ _ DVD, 5.1 Dolby surround EX, Region 1 encoding. Or simply: 538 _ _ |aDVD.
- **700 1 _** Required.
  Ex. 700 1_ Stone, Melicent, |eactor.

Common relators: actor  director  screenwriter  film producer  film director  
Full list: [http://www.loc.gov/marc/relators/relaterm.html](http://www.loc.gov/marc/relators/relaterm.html)
BLU-RAY only
Fields of importance differing from DVDs include:

- Sierra Header: Material Type – Required 3 = Blu-ray
- 007 – Format – Required. s = Blu-ray
- 130 - |a Required for TV series & to differentiate between film remakes |n Required for TV series
  (See TELEVISION SERIES and MOVIES sections below.)
- 505 – Formatted contents – Required for TV series and multiple works on one disc or set of discs (ex.: 4 movies on one disc).
  Ex.: 505 |gdisc 1.|tlt's alive! ;|tWaiting to exhale ;|tAn inconvenient lie --|gdisc 2.|tSee-through ;|tDark defender ;|tDex, lies, and videotape ;|tThat night, a forest grew --|gdisc 4.|gSpecial features.

- 538 – Required
  Ex.: _ _ Blu-ray, NTSC, region 1, 1080p high definition, widescreen; Dolby Digital 2.0, 5.1, 7.1 dts-HD master audio; requires Blu-ray player.
  OR simply: 538 _ _|aBlu-ray.

TELEVISION SERIES
Standardized. Catalogers should follow these examples.

- 130 0 Dexter (Television program). |nSeason 4.
- 245 10 Dexter |nThe fourth season  [Transcribe title as appears on item.]

MOVIES
Standardized. Catalogers should follow these examples.

- 130 0 _ Star is born (Motion picture : 1937).
  [Year is date of motion picture release, not the publication date.]
- 245 0 2 A Star is born |cSelznick International Pictures ; producer, David O. Selznick ; director, William Wellman.
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<th>Material Type</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
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<td>Siem, Mineral type <em>m</em></td>
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</table>

**VIDEOGAMES**

**Publication Info:**
- **Title:** The Legend of Zelda: Breath of the Wild
- **Edition:** Nintendo Switch
- **Platform:** Nintendo Switch
- **Publication Info:**
  - English
  - Created: 10-09-2018
  - Bib Code: 41

**Note:**
- **System requirements:**
  - **Nintendo Switch game system:**
  - **Nintendo Switch Pro controller compatible:** basic reading ability is needed to fully enjoy this game.

**Note:**
- **Supported features:**
  - Amibo (optional)
  - amiibo figures for amp houses in your adventure, Nintendo Switch Pro Controller compatible.

**Note:**
- **Title from container:**

**Note:**
- **ESRB rating:**
  - **10+:** Everyone 10+ (fantasy violence; mild suggestive themes, use of alcohol).

**Note:**
- **Basic reading ability is needed to fully enjoy this game:**

**Note:**
- **In the distant past, the many races of Hyrule lived together in harmony, the SITHI’s blue area providing life to the land, and everyone benefited from the SITHI’s advanced technology. The Calamity Ganon appeared, 10,000 years later, after having reverted to a medieval state, the kingdom of Hyrule rediscovered the ancient technology left behind by their ancestors through mysterious and unknown means.**

**Note:**
- **Game content in English, French and Spanish:**
- **Subject:**
  - Legend of Zelda
  - Quests (Expeditions)
  - Good evil
  - Computer adventure
  - Video games

**Added Author:**
- Nintendo of America Inc., publisher.

**Misc:**
- Nintendo Switch

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Fields of importance for Videogames:

- **Sierra Header**: Material Type - m = computer files
- **007**: Mat Catg - c = computer file ; Spec Mat - o = optical disc, b = chip cartridge ; Color - typically c = multi-color ; Dimens- g = 4 ¾ in. or 12 cm disc, a = 3 ½ in. disc, z = other, chip cartridge ; Sound - a = sound, blank = no sound, u = unknown
- **246** – Use for a “commonly known” name if it seems likely that users might search under that term.
- **250** – Give platform as edition statement Ex.: “Nintendo Wii”
- **300 Field**: |acomputer optical disc OR |a1 computer chip cartridge
  ;|bsound, color (if easily determinable)
  ;|csize – Diameter for CDs and DVDs (usually 4 ¾ in./12 cm or 3 ½ in.) ;|clength of computer chip cartridge (Ex. “2 ½ in.”)
  +|e – Brief description of accompanying material. No need to give pagination or dimensions.
  Ex.: “1 instruction booklet” or “1 user guide”, etc.
- **336** - two-dimensional moving image|btdi |2rdacore
- **336** - computer program|bcop|2rdacore
- **337** - computer|bc |2rdamedia
- **338** - computer chip cartridge|bc |2rda|carrier
- **340** - |b1 1/4 in.|2rda
- **344** - digital|boptical|2rda
- **344** - digital|bmagnetic|2rda
- **347** - data file|2rda
- **500** - Include a note giving number of players if easily determined
- **521** - ESRB ratings
- **520** - Include a brief objective summary, if easily determined.
- **538** - System requirements.
  If the game has an online component with separate system requirements, summarize these in a separate 538 field. Patrons typically need to have their own paid subscription to an online gaming service to make use of these features.
  Ex.: “Xbox Live requirements: paid subscription; Internet service (cable or DSL); Ethernet cable”
- **710** - Heading for the game manufacturer.
• 753 - System Details Access to Computer Files (The type of machine, programming language and/or operating system used with computer files and accompanying material). Ex.: “Nintendo Switch”

*Kits*

See *section III. 4. Homegrown or Local Interest Materials.*

Fields of importance include:

• Sierra Header: Cat. Date – Use “9/10/2006”, Material Type – o = Kit,
• MARC Leader: Rec Type – Required
• 040 – Required
• 300 – Required, other 3XXs encouraged
• 500/505/520 – Encouraged
• 6XXs – Any subject headings used must be verified.

*Museum passes*

Search by title and then keyword, if needed, to locate the correct bib record for these items. LION has created a bib record template to be used for these items, which includes the appropriate material type. For assistance, contact the LION cataloger.

*Equipment*

See *section III - 4. Homegrown or Local Interest Materials.*

Fields of importance include:

• Sierra Header: Cat. Date – Use “9/10/2006”, Material Type – o = Kit OR r = realia/3D object
• MARC Leader: Rec Type – Required. Often will be r = 3-dimensional or naturally occurring object
• 040 – Required
• 300 – Required, other 3XXs encouraged
• 500/505/538 – Encouraged
• 6XXs – Any subject headings used must be verified.
To locate Templates

1. In Sierra’s Admin menu, select “Settings”.
2. In the Settings window, select the “Record Templates” tab.
3. To work with bib record templates, select “Bibliographic” from the dropdown menu labeled “Record Type”. Select “Item” to work with item templates.
4. There are two lists, headed “Preferred Templates” and “Other Templates”. Templates available for cataloger use are listed in the left-hand panel labeled “Preferred Templates”.
Editing a template that is already present in this list

1. Highlight the template name, then click “Edit”.
2. When finished editing a template, click “Save” in the editing window, then close that window. “Save Settings” must also be clicked, at the bottom of the ‘Record Templates’ window in order to save changes.

Creating new templates

It is recommended that you copy and then modify one of the existing templates under ‘Other Templates’ that have names starting with ‘Li’ or ‘LION’.
DO NOT modify or move any of the templates in the ‘Other Templates’ list.

In these templates, “|” or pink fields should be edited. Sometimes a space or “no attempt to code” are appropriate responses.

Copying and editing/modifying a template

1. Select the desired template and click “Edit”.
2. In the editing window, do not make any changes, but go to the ‘Edit’ menu and select “Copy Template”. This will create a new copy of the template that belongs to you.
3. A prompt will appear to give the new template a code and description. Do this and click “OK”.
4. The new template will appear in the list of ‘Preferred Templates’, identified by the code and description just supplied. This template can now be edited to suit the cataloger’s needs.
   Note: The old template will be right behind the new one on the screen, which is not readily apparent.

EXPANDING A FIELD IN SIERRA

- Right-click within the field. If it is expandable, a menu will appear that includes “Expand Field.” Select this option.
- OR Left-click in the field, then open the Sierra window’s ‘Edit’ menu. If it is expandable, “Expand Field” will be present for selection.
- OR Left-click in the field, then type “Control” + “R”. If it is expandable, it will expand.

VERIFYING Indexed FIELDS IN SIERRA

Names

1. Right-click the field and select “Verify Heading” from pop-up menu.
   OR Left-click the field and select “Verify Record Headings” from Sierra window ‘Tools’ menu.
   OR Left-click within the field and type “Control” + “G”.

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2. A list of names will appear, which either includes the name being verified or shows where the name would be if it were present in the index. Clicking the downward pointing triangle at the bottom of the list will reveal more entries.

3. For each name present in the ‘Results’ list, there is a code in the ‘Source’ column that starts with either “a” or “b.” Ensure that there is an “a” (authorized) name for the author, creator, or contributor in the bib record. Select that heading.

4. The author’s authority record will be displayed at the top of the window. Ensure that the information in that authority record matches what is known about the author or contributor of the item being cataloged. (The author’s/contributor’s or publisher’s websites may be consulted if needed.)

5. NOTE: If record says “THIS 1XX FIELD CANNOT BE USED UNDER RDA” or something similar, continue searching ‘Results’ list for the next “a” in the Source column. Do not use this heading.

6. If the information matches and the correct authority record is present, double-click that entry in the results list, select the appropriate button designating use “from the index with (or without) extended information”, then click “OK”. The authorized form of the name now appears in the field being verified.

7. When a usable authority record is located, see if the information in that record matches what you know about the author or contributor of the item you are cataloging. If yes, double click that entry in the list, then click OK. The authorized form of the name now appears in the field you are verifying.

8. If the information does not match, continue searching the ‘Results’ list for “a” authority records that match the bib record item author/contributor being verified. Clicking the downward pointing triangle at the bottom of the list will reveal more entries.

9. If no authority records match, leave the field as is.

Examples:
- The bib record is for a popular novel and has “Patterson, James” in the 100 field. When the field is verified, the first item in the list is an “a” authority record, but it says “THIS 1XX FIELD CANNOT BE USED”. The next 49 items in the list are “b” (bib) records not authority records. Click the triangle to see more records in the Results list. Finally, 35 records further down, an authority record appears: “Patterson, James, 1947-.” Looking at the record in the window above the list by scrolling down until ‘clues’ are seen that match the desired author: “suspense fiction,” “novelist.” This entry is the proper authority record to use.

- The bib record is for a popular novel and has “King, Stephen” in the 100 field. When verifying the field, the first item in the ‘Results’ list is an authority record: “King, Stephen, 1931-.” When looking at the record in the window above the list, it shows that this author wrote nonfiction about marketing, but
there is no mention of fiction. The second authority record is also about the nonfiction author. The third item is “King, Stephen, 1947-.” Present in this authority record are “horror tales,” “novelist,” “Carrie,” etc. This is probably the author being sought. This is the proper authority record for this novel.

Subjects

The process is the same as in VERIFYING NAMES, above. This will give catalogers a rough idea of which subject headings are standard in the LION system.

For example, “Travel — Asia — India.” has no matching subject authority, but “India |xDescription and travel” is authorized.

LION LIBRARY CODES

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<tr>
<td>MS notated music</td>
<td>d</td>
<td>Computer file</td>
<td>m</td>
</tr>
<tr>
<td>Cartographic material</td>
<td>e</td>
<td>Kit</td>
<td>o</td>
</tr>
<tr>
<td>MS cartographic material</td>
<td>f</td>
<td>Mixed materials</td>
<td>p</td>
</tr>
<tr>
<td>Projected medium</td>
<td>g</td>
<td>3-d object</td>
<td>r</td>
</tr>
<tr>
<td>Nonmusical sound recording</td>
<td>i</td>
<td>MS language material</td>
<td>t</td>
</tr>
</tbody>
</table>
MACROS

Macros are shortcuts built into Sierra that catalogers may populate with commonly used text strings and functions. Example: copyright symbol = F7, which is available to all catalogers in Sierra already.

Catalogers may tailor individual macros to save time and minimize errors, such as inserting the text string “|q(hardcover)” automatically when pressing F12 (after they have programmed this key).

Another use is to speed up functions in Tech Services or Circulation, such as changing an item from the “New” location code to its regular one.

The Sierra Manual has good instructions on setting up custom macros, under ‘Index’ – ‘macros’ – ‘settings’. Instructions are included below, or see the manual here: https://catalog.lioninc.org:63100/sierra/admin/help/Default.htm#sgil/sgil_settings_macros.html#kanchor2774.

Instructions from the Sierra Manual

Customizing Function Keys

To customize the function keys for the current user:

1. Select Admin | Settings. The Settings window opens.
2. Click the Macros tab.
3. Select one of the following tabs depending on which keys you want to customize:
   - No Modifier - to customize function keys F1 through F12
   - ALT - to customize function key combinations Alt+F1 through Alt+F12
   - CTRL - to customize function key combinations Ctrl+F1 through Ctrl+F12
   - SHIFT - to customize function key combinations Shift+F1 through Shift+F12

Some function keys are reserved by the system. See the Reserved Keys section below for further information.

4. In the corresponding text input box, enter text and/or keyboard codes.
5. Repeat the foregoing steps until you have customized all the function keys you want to use.
6. Depending on how you want to use the customized function keys, do one of the following:
   - To retain the customizations you have made, click Save Settings. The Settings window closes. Sierra applies your changes during the current session and retains them for use in subsequent sessions.
   - To use the customized keys for the current session only, click OK. The Settings window closes. After you log off of the current session, Sierra does not retain your custom changes.
   - To clear all unsaved changes, click Reset.
   - To exit the Settings window and discard your changes, click Cancel.

Creating Macros

The following guidelines apply to creating macros in the Sierra Desktop Application, Sierra Web, and the Sierra Administration Application.

You can customize function keys F1 through F12 singly or in combination with the Alt, Ctrl, or Shift keys. When you have customized your function keys, you can press them to activate the macro. For example, you can

10 https://catalog.lioninc.org:63100/sierra/admin/help/Default.htm#sgil/sgil_settings_macros.html#enterText
customize F9 to enter the text string "Colorado Springs". You can then put the cursor in the City field for new patron records and press F9 instead of typing "Colorado Springs".
Note that some function keys are reserved by the system. See Reserved Function Keys below for further information.

**Entering Text in a Macro**

To enter text for a macro, type the text. For example, enter "Bay Street Branch Juvenile" (without quotation marks) in the F9 text box. This associates the F9 function key with that string of text.
To test the macro, place the cursor in any text input field, such as an item record Location field, and press F9. Sierra populates the text field with the string "Bay Street Branch Juvenile".

Macros are case-sensitive, that is, they distinguish between uppercase and lowercase letters. When you need a capital 'B', be sure to enter 'B' and not 'b'.

**Entering Diacritics and Special Characters in a Macro**

You can enter diacritics and special characters into macro text using the appropriate Unicode code preceded by "u" and within braces. For example, the British pound sign (£) is entered as \{u00A3\}.
You can enter diacritics by using the code for the combining diacritic followed by the letter that is modified. However, in Unicode it is more common to use a single code for the diacritic and letter together. For example, ñ is entered as \{u00F1\}.

If you want to enter only the diacritic into a macro so that you can use the macro to modify a preceding character, add the \ character before the closing ) in the macro. For example, if you want the macro to supply the acute accent diacritic (´) to any character that precedes it, enter \{u0301\} as the macro text. Then, you can type a character, such as a, e, or o, followed by the macro key to produce the modified character á, é, or ó.
You might have to toggle the View | Show Codes menu option to see the diacritics rather than the code.

**Entering Keyboard Codes in a Macro**

You can specify non-alphanumeric keys, such as Ctrl, Shift, and Page Up, in a macro. You can also use a combination of non-alphanumeric keys and alphanumeric keys. For example, Ctrl+a selects all the items in a table.
To use a non-alphanumeric key or key combination, you must enter a keyboard code in the function key text box. The keyboard codes use all capital letters and are enclosed in percent signs, for example, %ENTER% corresponds to the Enter key.

To enter non-alphanumeric keys for a macro:

- Type the keyboard code for the key (see the List of Keyboard Codes below), or
- In the Sierra Desktop Application, you can right-click the input text box and choose the key from the pop-up menu.
  Note that you can use only the non-alphanumeric characters listed in the pop-up menu. The system does not recognize other non-alphanumeric keys.

The system uses the plus sign + for non-alphanumeric/alphanumeric key combinations. For example, %CTRL+a% corresponds to Ctrl+a, which selects all the items in a table. Note that the 'a' is inside the percent signs to signify that it is entered while the Ctrl key is depressed. Be careful not to place extra letters inside the percent signs, unless that is what you intend. For example, in Circulation, to change the function to

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12 https://catalog.lioninc.org:63100/sierra/admin/help/Default.htm#sgil/sgil_settings_macros.html#Reserved
Search/Holds, you enter Alt+g, and then press u, and then h. To make this key combination into a macro, enter `%ALT+g%uh` in the function key text box.

**Limitations**

A macro cannot affect more than one object, such as a screen, dialog box, or table. For example, in Circulation, to modify the Note in a patron record, you enter Ctrl+Shift+E to edit the patron record, and then Alt+N to move the cursor to the Note text box. A macro for this key combination would look like this:

```plaintext
%CTRL+SHIFT+e% %ALT+n%
```

However, the macro does not work, because the first set of keys applies to Circulation Desk window and the second set to the Edit Patron Record dialog box.

**Summary of Rules for Entering Macros**

The following rules apply when entering macros:

- Macros use alphanumeric keys, non-alphanumeric keys, and text strings in any combination.
- Macros are case-sensitive.
- Spaces are allowed within text strings, but not between keyboard codes.
- Keyboard codes are all uppercase.
- Keyboard codes must be enclosed in percent signs.
- To represent alphanumeric and non-alphanumeric keys pressed simultaneously, enclose the letter or number and the keyboard code in percent signs.
- Use the plus sign '+' to indicate keys that are "pressed" simultaneously.
- Text strings are not separated from alphanumeric or non-alphanumeric keys by plus signs or other markers.
- Macros cannot change the active screen element, that is, macro elements cannot apply to separate windows elements or dialog boxes.

**Special Function Key on PCs using Windows**

Macros assigned to the F6 function key work like TAB commands, that is, F6 moves the current focus to another screen element. For macros that are configured to open a menu or function, this effect is inconsequential. However, for macros that are configured to enter data into a field, this causes the system to switch focus from a field before it can enter the data. To avoid this conflict, do not configure the F6 function key to enter data in fields.

**Reserved Function Keys**

Some function keys are reserved by the system. For example, ALT+F4 is reserved to close the current window or browser. In the Sierra Desktop Application and Sierra Web, the macro text input box contains the text "RESERVED" and is un-editable for reserved keys. Note that the reserved keys differ between the Sierra Desktop Application and Sierra Web, as noted in the drop-down lists below.

**List of Keyboard Codes**

The following table shows you the character strings that correspond to various non-alphanumeric keys.

Note that the codes use all capital letters and that the code must be enclosed in percent signs.

Use these codes to incorporate non-alphanumeric characters in macros.
To represent simultaneous keystrokes, use the ‘+’ sign. For example: “%CTRL+SHIFT+p%”.

<table>
<thead>
<tr>
<th>Keyboard Code</th>
<th>Corresponding Key Combination</th>
</tr>
</thead>
<tbody>
<tr>
<td>%HOME%</td>
<td>Home</td>
</tr>
<tr>
<td>%END%</td>
<td>End</td>
</tr>
<tr>
<td>%LEFT%</td>
<td>Left Arrow</td>
</tr>
<tr>
<td>%RIGHT%</td>
<td>Right Arrow</td>
</tr>
<tr>
<td>%UP%</td>
<td>Up Arrow</td>
</tr>
<tr>
<td>%DOWN%</td>
<td>Down Arrow</td>
</tr>
<tr>
<td>%TAB%</td>
<td>Tab</td>
</tr>
<tr>
<td>%PGUP%</td>
<td>Page Up</td>
</tr>
<tr>
<td>%PGDOWN%</td>
<td>Page Down</td>
</tr>
<tr>
<td>%ENTER%</td>
<td>Enter</td>
</tr>
<tr>
<td>%SPACE%</td>
<td>Space</td>
</tr>
<tr>
<td>%ALT+&lt;another key&gt; %</td>
<td>ALT+&lt;another key&gt;</td>
</tr>
<tr>
<td>%CTRL+&lt;another key&gt; %</td>
<td>CTRL+&lt;another key&gt;</td>
</tr>
<tr>
<td>%SHIFT+&lt;another key&gt; %</td>
<td>SHIFT+&lt;another key&gt;</td>
</tr>
</tbody>
</table>
REMOTE SEARCHING

Libraries in the LION consortium have online access to the catalogs of other libraries and systems such that records may be downloaded into or overlaid on records already present in the LION database. LION strongly encourages the use of ISRs instead of Remote Searching in most cases. (Please see item 6 below.)

Catalogers can conduct a Remote Search by doing the following:

1. Select “Remote” (instead of “Local”) from the drop-down list next to the ‘Search’ box in Sierra.
2. A ‘Select Databases’ window will pop up. Choose the desired libraries to search by clicking the check boxes next to those libraries. Click “OK”. The window will close.
3. After ensuring the search type and search terms are correct, click “Search”. The “Searching Remote Databases” window will pop up and the files will be loaded. When the “Close” button appears, click it to view these records.
4. To view the records, select by double-clicking the record in the list. Return to the Results list by clicking the “Browse” arrow at the top of the Sierra window.
5. Ensure that all of the information is complete and that is matches the item in hand. Do not download or overlay a poor record from the remote databases. The records can be edited before or after they are downloaded or overlaid.
6. All records from remote databases brought into the LION catalog MUST be in compliance with our standards, and are the responsibility of the importing cataloger. Failure to comply with these standards will result in the loss of the ability to conduct Remote Searches by that library. (See Section VI. FULL BIBLIOGRAPHIC RECORDS for requirements.)