Creating and Editing Item Records

Part 1



Part One - Overview

- What is an Item Record? (page 4)
- What is a Bibliographic Record? (page 16)
- Searching for a Bibliographic Record (page 24)
- Creating an Item record (page 32)
- Review the Three Step Process (page 59)
- Quiz (page 71)

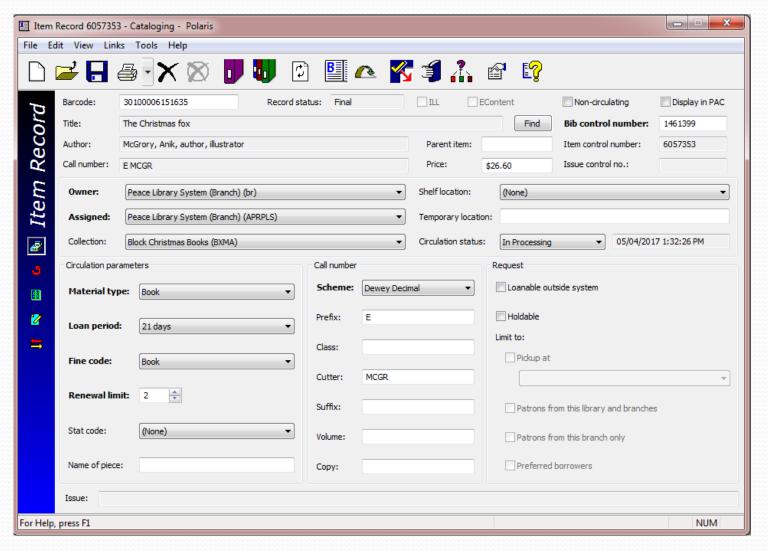
The 2017 revision of this presentation was made with Polaris 5.2 screen shots.

What is an Item Record?

What is an item record?

- An item record contains specific information about one of the books, (or magazines, audio books etc.) in your library.
- Two or more libraries may have the same book, (or magazine, audio book etc.), but the item record for each will be unique.
- Between libraries, call number protocols differ, lending periods differ, shelving locations differ as well as fine codes, renewal limits, circulation status and other library specific facts about the books, (or audio books etc.).
- Each item record has two unique indicators the *barcode*, (assigned by the library, or the system headquarters) and the *item record control number* (created by Polaris).

This is an item record

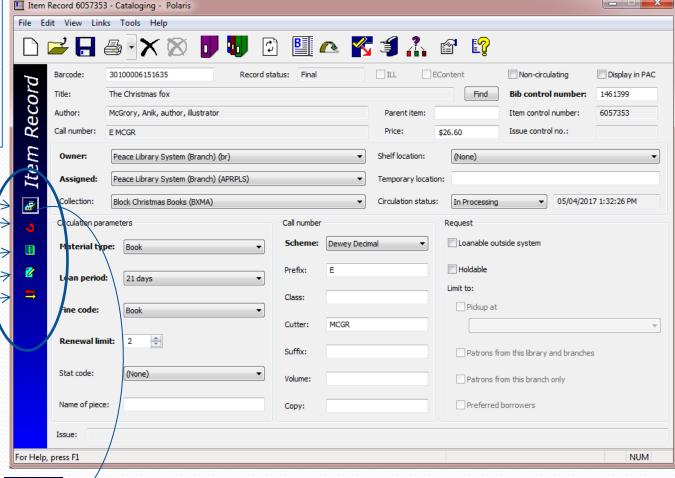


Item record – cataloguing view

In the top area of the item record, some fields can be edited or changed. These have a white background, like barcode or price, OR have a drop down menu arrow, like owner or shelf location.

- 1. Cataloguing view
- 2. Circulation view
- 3. Source and acquisitions view
- 4. Notes and notices view_
- 5. History view

The icons on the blue banner on the left provide different "views" of the item record.





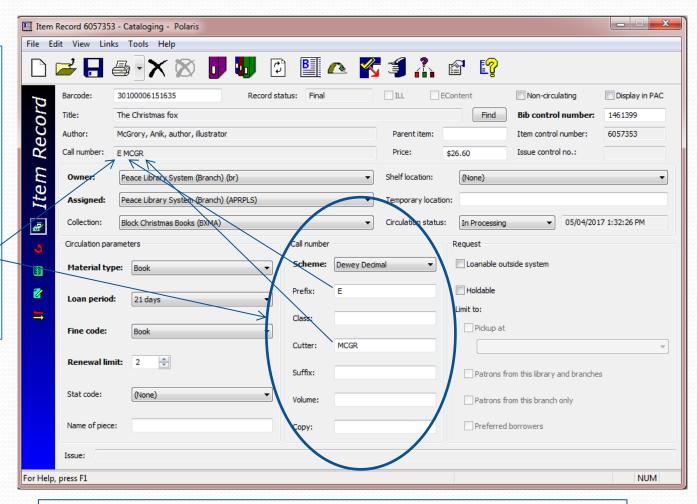
This first (default) view is the cataloguing view.

Item record – cataloguing view

In the top area of the item record, some fields <u>cannot</u> be edited or changed. These have a grey background, like title, or author. These details come from a Bibliographic record. In this case, the Bibliographic record with control number 1461399. The Call number (grey background) reflects what is entered in the fields below (with white backgrounds).

Cataloguing view

- -Circulation parameters
 - -Material type
 - -Loan Period
 - -Fine Code
 - -Renewal Limits
- -Call number parts entries here are reflected in the top area of the workform.
- -Request parameters



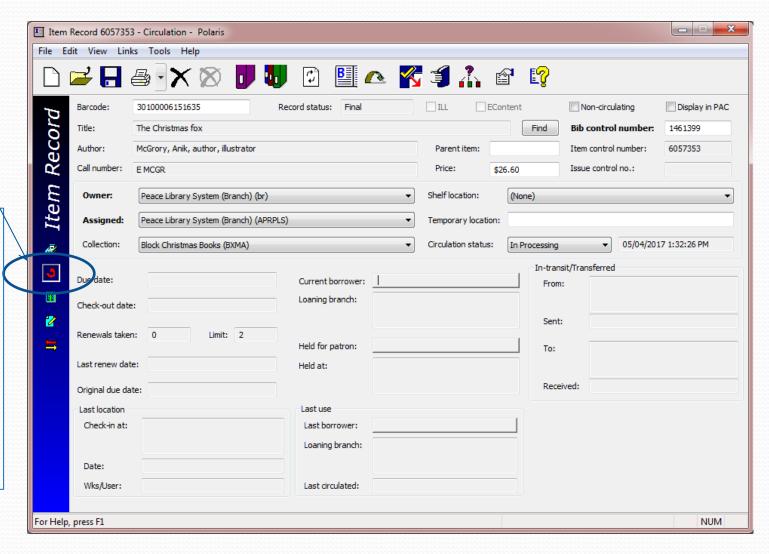
Clicking on the left banner icons changes the bottom half of the work form, as seen in the next slides.

Item record - circulation view



- -Due Date
- -Check-out date
- -Renewals
- -Patron number
- -Last borrower
-and more!

These fields will be populated once the item starts to circulate.

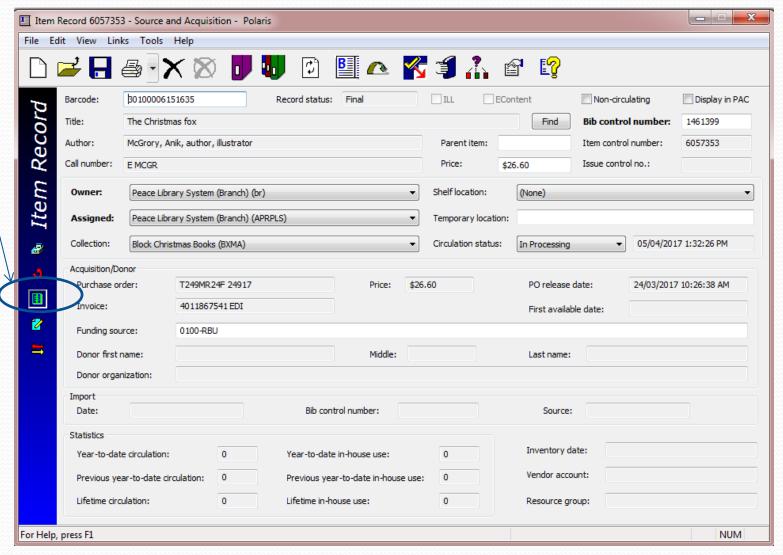


Item record – source & acquisitions view



Many of these fields are auto-populated by purchase orders and invoices created in the PLS acquisitions department.

Statistics will accumulate as the item circulates.

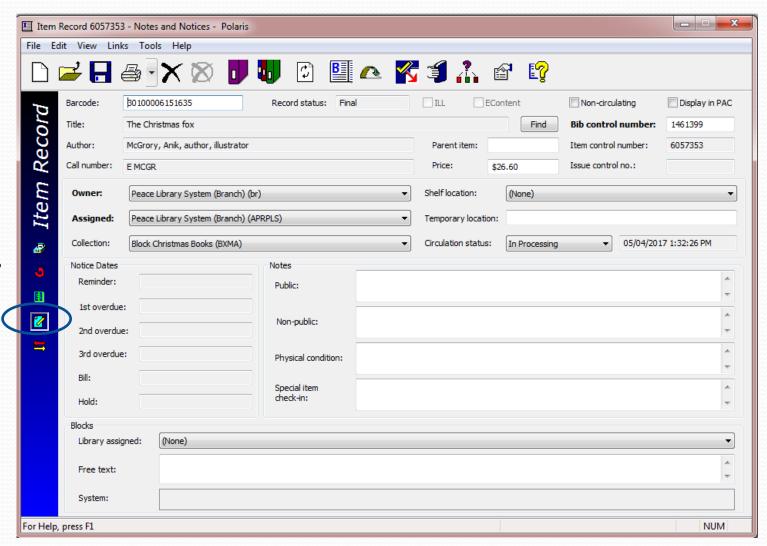


Item record – notes and notices view



Notice dates will be populated as the patron, keeping the item past the due date, receives notices.

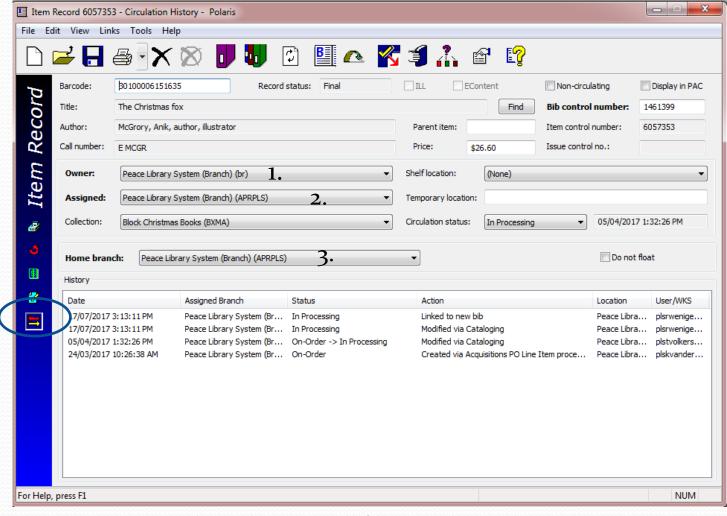
Other special notes and blocks are also found in this view of the item workform.



Item record – History view

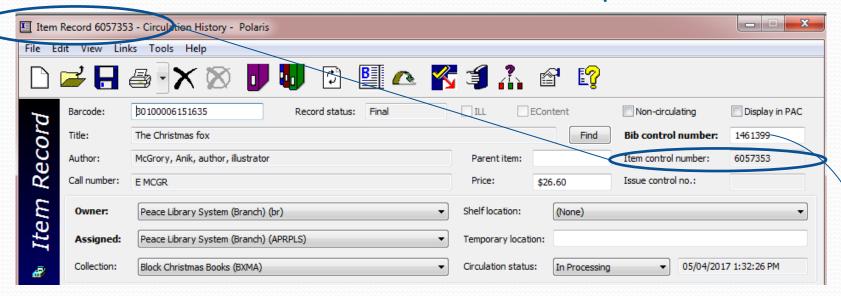
Notice three places where Polaris identifies the "owner" of this item!





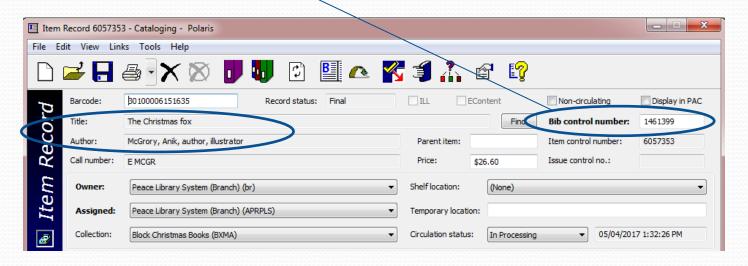
As your item circulates this area will fill up with circulation history! This is cleared annually by headquarters.

The item control number is what Polaris uses to distinguish between your item and an item belonging to another library. If you have two copies of the same book, each will have a different barcode and each will have a unique item record!



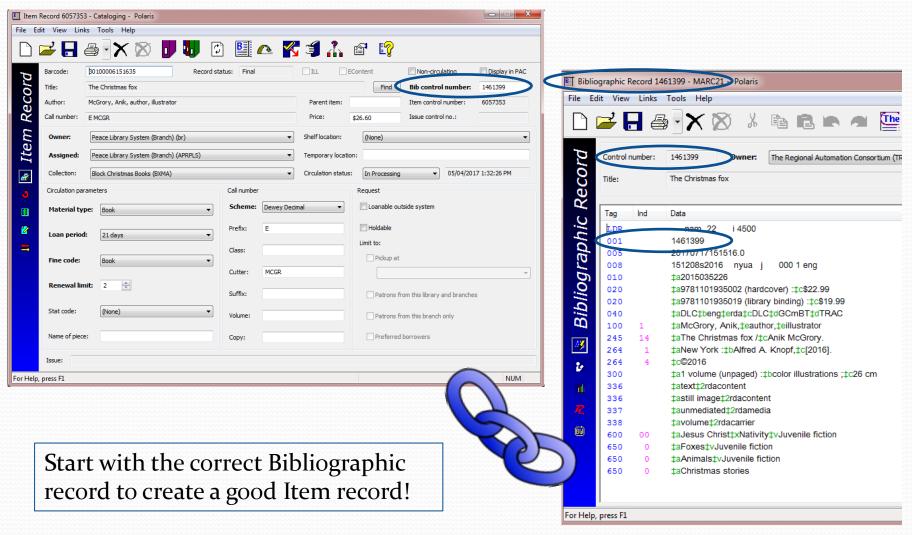
Bibliographic (Bib) record #1461399 provides the title and author information. For this item record to be correct, it must include the correct Bib control number.

Our item record example derives its title and author's name from the Bibliographic (Bib) record to which it is linked.



If you scan this barcode you should see this title and author. If you see a different title and author, the Item record is linked to the wrong Bibliographic record. If you change the Bib control number, title and author change.

An Item record linked to the correct Bibliographic record



What is a Bibliographic Record?

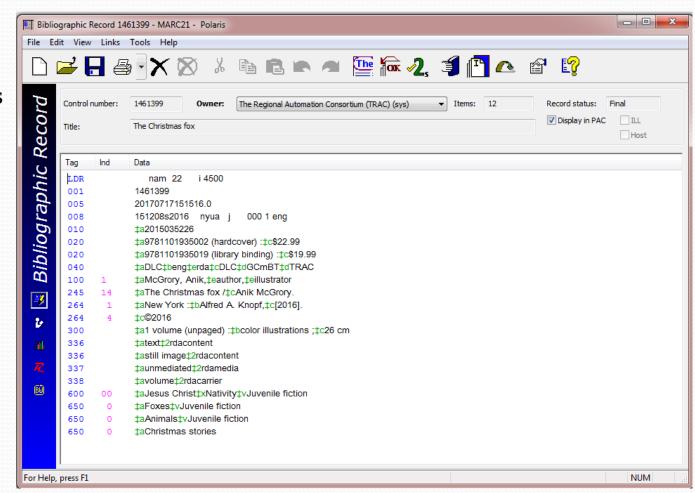
What is a Bibliographic (Bib) record?

- A Bib record contains specific information about a book, (or magazine, audio book etc.) that is owned or "on order" by one or more libraries.
- Most Bib records in the Polaris database represent one specific edition of an item (usually identified by a unique ISBN as found on the item).
- Some Bib records represent many issues or editions of an item (like a monthly or yearly publication). These will be the focus of part two of "Creating and Editing Item Records".
- All item records are <u>linked</u> to a Bib record by the "Bib control number".
- The first step in adding a new item is to find a matching Bib record in the Polaris database.
- The next slide shows a Bib record in the default (MARC) view.

Bib record (#1461399) MARC (MAchine Readable Cataloguing)view

The Polaris "machine" can read this data by using the numeric tags that are in the first column. Familiarize yourself with these "tags":

- oo1 Bib control #
- 020 ISBN
- 100 Author
- 245 Title
- 264 Publisher
- 300 Physical data
- 500's Summary
- 600's Subject
- 700's Illustrator



A complete Bib record should have most of these tags.

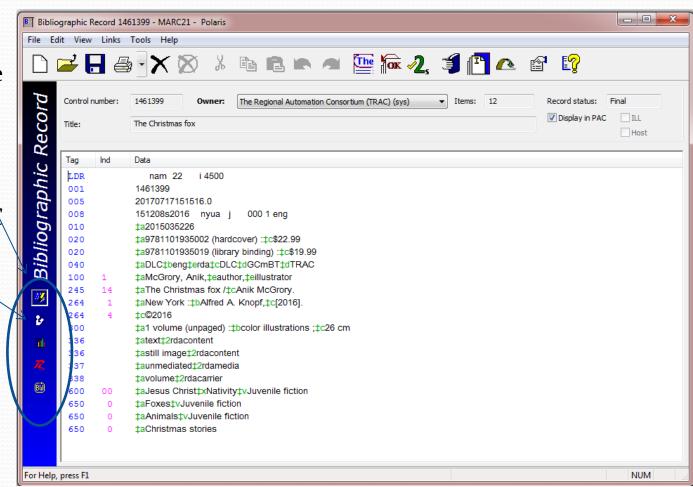
Bib record # 1461399 - MARC (default) view



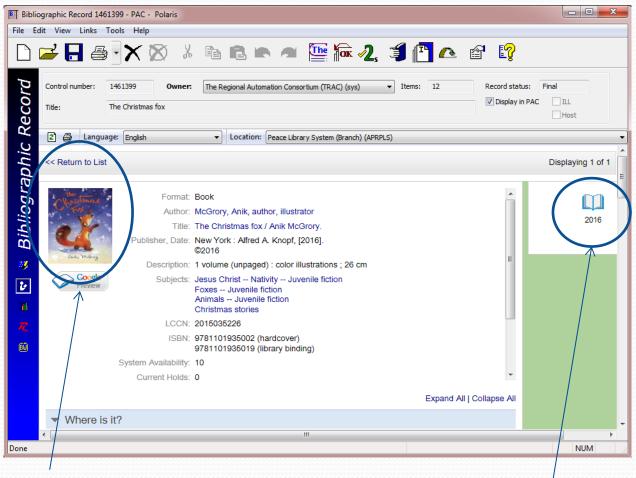
Note the *icons* on the blue side banner.

Clicking on the second icon opens the record in the PAC (Public Access Catalogue) view.

The PAC view is shown on the next slide-this is what patrons see online...



Bib record # 1461399 - PAC view

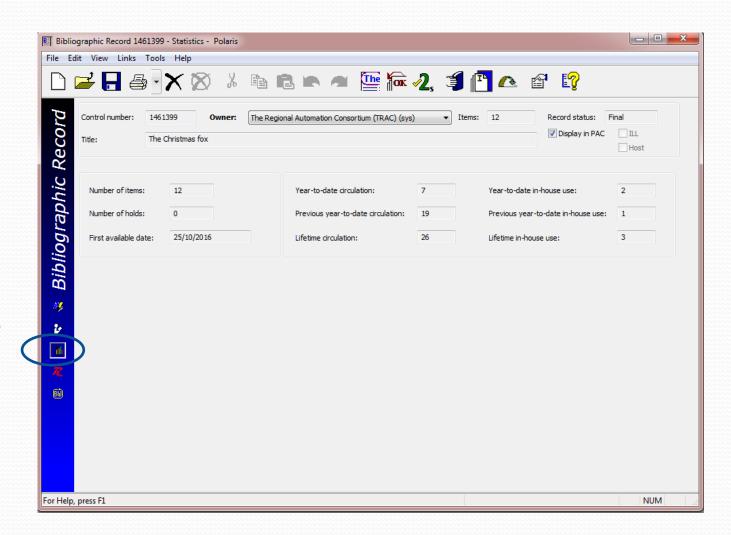


In this view a *photo* of the item cover is often seen, as well as an *icon* which is derived from the cataloguers codes in the MARC record, informing Polaris that the item in this case is a book. Other information from the Bib record is shown without the tag numbers, in this expanded view. Patrons scroll down to see owning libraries.

Bib record #1461399 - Statistics view



The third, statistics, view of the Bib record workform shows the circulations statistics s of all 12 linked items. The next two views (Resources and Bound-with) are little used in TRAC.

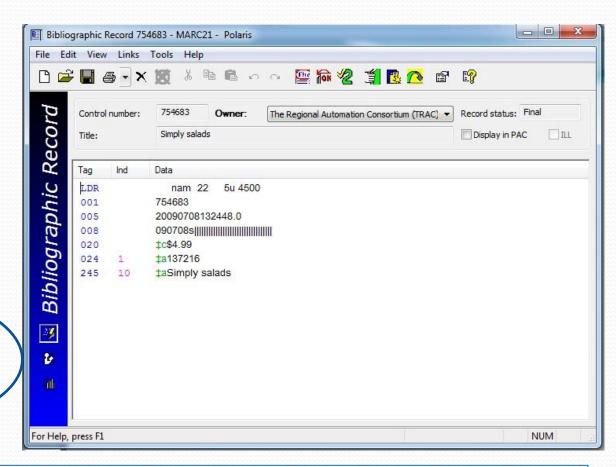


Incomplete Bib record

Look what is missing in this example:

- No Author (100 tag)
- No ISBN (o2o tag, subfield a)
- No publisher (260 tag)
- No physical description (300)
- No subject description (600's)

Do **NOT** add your item record to an incomplete Bib Record!



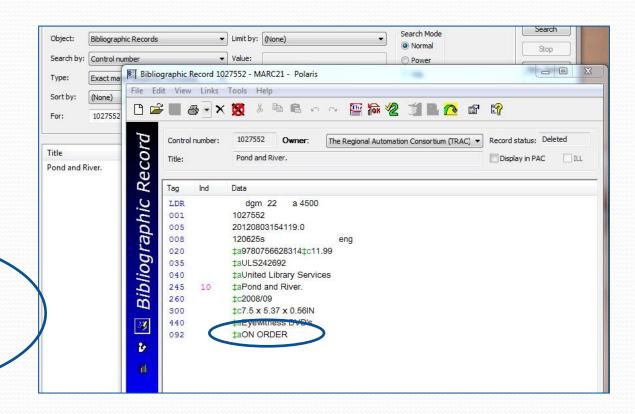
If this is the ONLY Bib record you can find for "Simply Salads" please send the item to headquarters for cataloguing.

Incomplete Bib record – "On Order" record

Look what is missing in this example:

- No Author (100 tag)
- No publisher (260 tag)
- No physical description (300)
- No subject description (600's)

Do **NOT** add your item record to an "on order" Bib Record!



If this is the ONLY Bib record you can find for "Pond and River" please send the item to headquarters for cataloguing.

Searching for a Bibliographic Record

How to search for a complete Bib record

- Examine the item to be added carefully so your search for the correct Bib record is successful.
- Check the front and back covers and the title page.
- Also check the reverse of the title page (Tp. verso).

Search by ISBN!!

What is an...ISBN? ...a barcode? ...a UPC code?



A <u>barcode</u> is 14 digits long, and has your library code in the 2,3,4 and 5^{th} positions to identify items which belong to your library. (PLS = 0100)

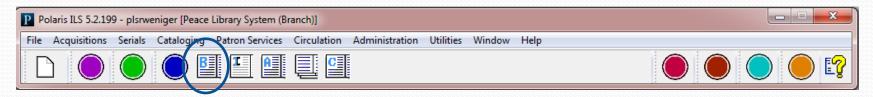
<u>UPC</u>s (<u>U</u>niversal <u>P</u>roduct <u>C</u>odes) are 12 digit numbers found on most items you purchase and are used at store tills to scan an item's price.



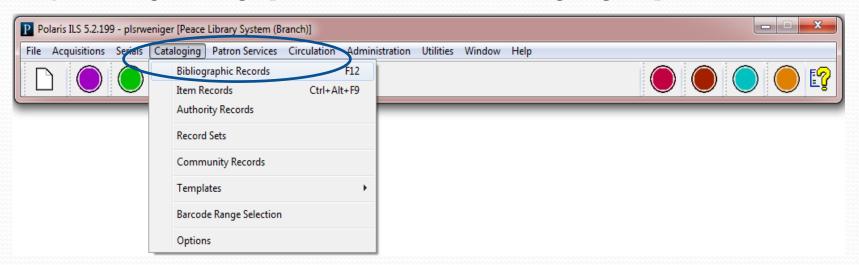
An <u>ISBN</u> (<u>International Standard Book Number</u>) is a 13 digit number which uniquely identifies each book published. Look for "978" at the beginning of the string. Some older books may have a similar 10 digit number, or both. (ie. 978<u>037583447</u>9, and 037583447x). DVD's may have a 10 digit ISBN (not scannable) found above the UPC code. Magazines and serials have a similar "ISSN code" (<u>International Standard Serial Number</u>) found inside the publication.

Start by launching a Bib record find tool

Open a Bib Record Find Tool, by clicking on its icon (after clicking the blue button):



Or by choosing "Bibliographic Records" on the Cataloguing dropdown menu:



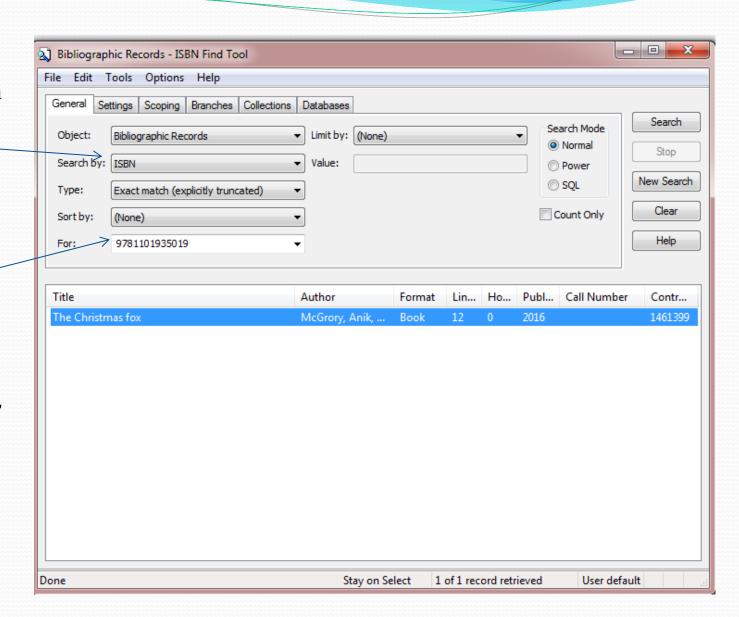
Or by clicking on F12 (Function key on the top of your keyboard)

Use the drop down menu in the "search by" field to search by ISBN.

Enter the ISBN in the "for" field, preferably by scanning.

If you must enter the ISBN manually, do not use spaces or any other character, unless it is a letter x at the end of the numeric string.

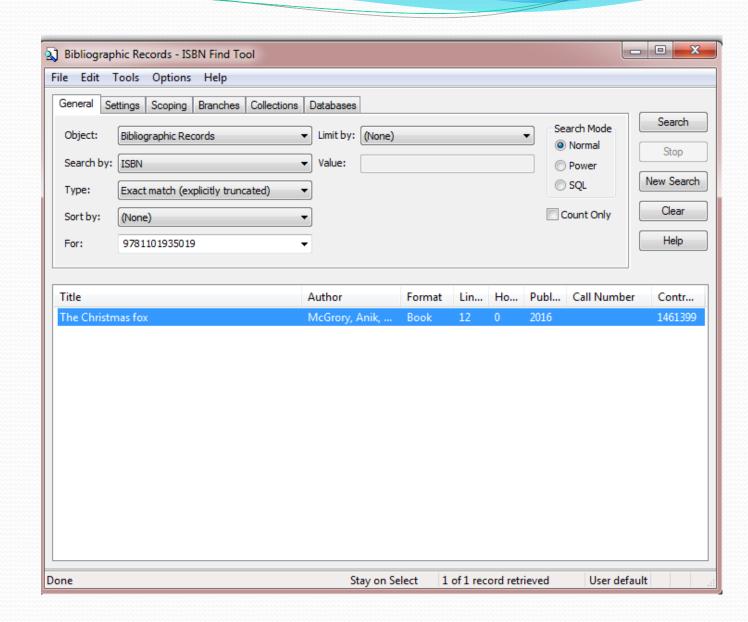
Be sure you are scanning an <u>ISBN</u>...



Usually there will be one result in the find tool window. Double click on the result to open the Bib record.

If there are no results, send the item in to headquarters for cataloguing.

If there are more than one result, read each Bib record carefully to choose the best one.



When there are more than one Bib record with the same ISBN...

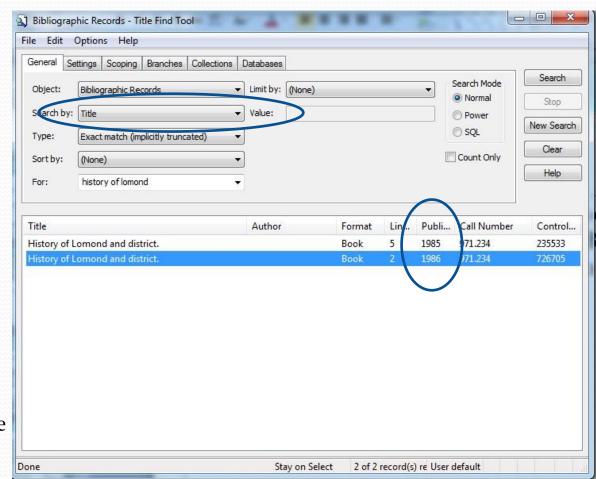
- Open each record and compare the item in hand to the detailed information in the Bib.
- Avoid adding to (older) Bib records which contain multiple ISBNs (and therefore multiple formats ... hardcover, softcover, etc.)
- Do not add items to incomplete or "on-order" records.
- If you cannot find a good matching Bib, send the item to headquarters for cataloguing.

Items with no ISBN

Occasionally self published volumes or older books do not have ISBNs.

Change the Bib record search tool parameter to "Title" or "Author". In this example, choosing the appropriate publication date (1985 or 1986) should be the correct choice. Regardless, open the Bib record and compare it to the item in hand.

Spelling must be very accurate for title searches to work. Note that the search engine found the full title, although only the first three words were entered.



Creating an Item Record

Introducing the three step process. Every time you add an item record:

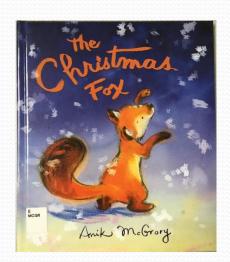
- 1. Examine the item in hand. (Both covers & both sides of title page. "The Christmas fox" had it's Cataloguing-in-Publication (CIP) data on the inside of the back cover, instead of the back of the title page.)
- 2. Find the correct Bib record by searching for the ISBN in Polaris. Keep referring back to the item to ensure accuracy.
- 3. Create a correct item record, and save it.

Cover

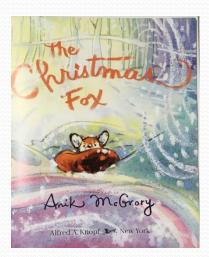
Back Cover

Title page

Inside back cover or Tp. verso







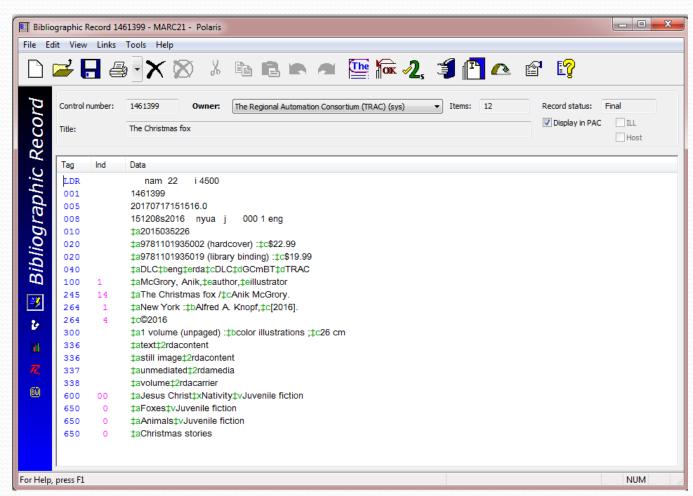


Compare your item to the Bib record

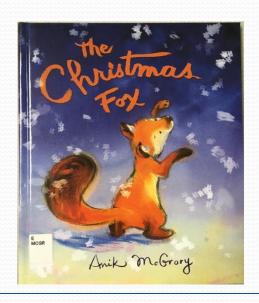
Check for these important tags:

- 245 Title
- 100 Author
- 700 Illustrator
- 264 Publisher
- 300 Physical description
- 600s Subjects

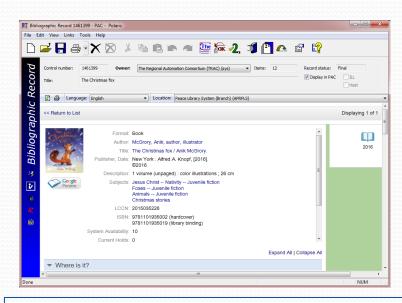
Newly published books should have more than one 300 tag to indicate RDA cataloguing standards compliance.



Find the perfect match?



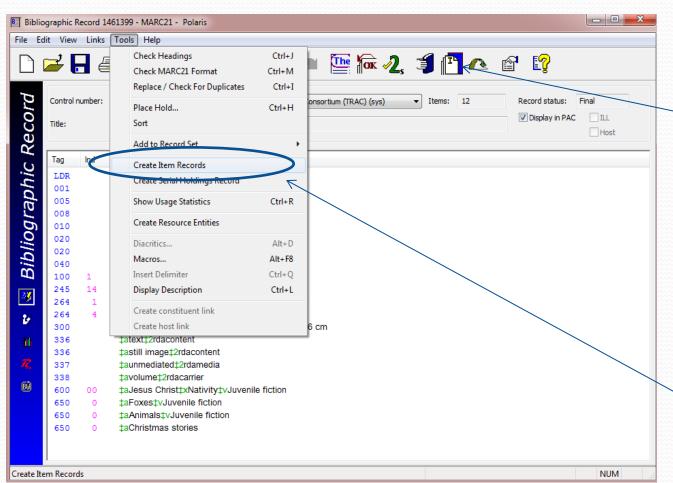
- > ISBN
- > Title
- > Author
- > Illustrator
- > Publisher
- ➤ Year of publication, place
- ➤ Format or description (book, or DVD?)
- Dimensions, number of pages



Once you are convinced that you have the correct Bib Record, you are ready to "create" a new item record, which will be automatically "linked" to this Bib record.

Your item will then be listed along with all the other books that are also linked to the same Bib record.

Create your item record





From the icons across the top of the Bib record, click on the "Create Item Record" icon,

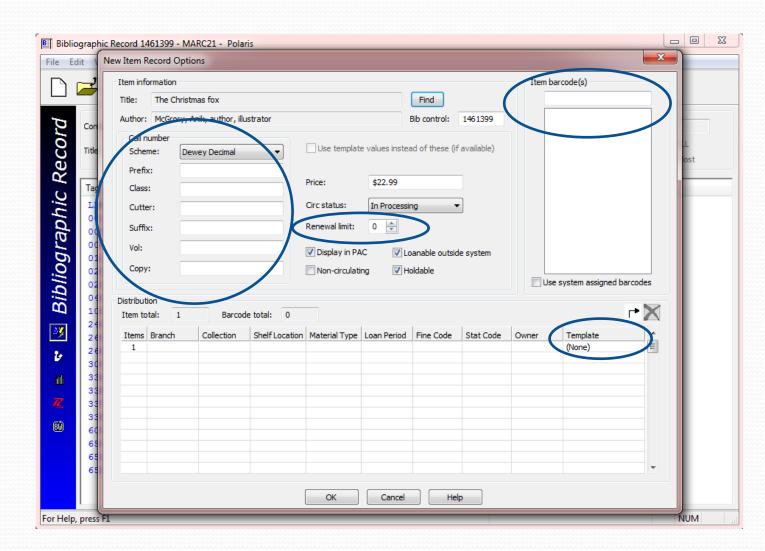
OR

choose "Create Item Records" from the "Tools" drop down menu.

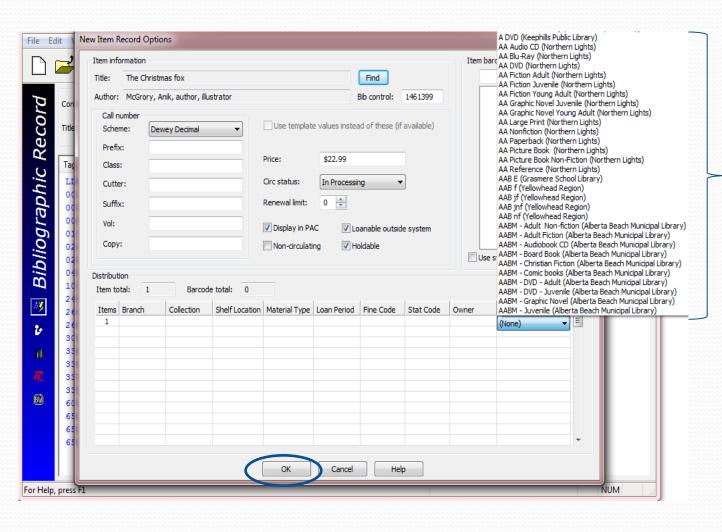
Completing the Item Record Work Form

Choose a template from the dropdown menu, which will populate every field in the line: Branch, Collection, Material Type, Loan Period, Fine Code and Owner. (Stat code is not used in TRAC)

On this workform or on the item record that is created and is shown after clicking on OK, the barcode, the call number, and the renewal limit are also required.



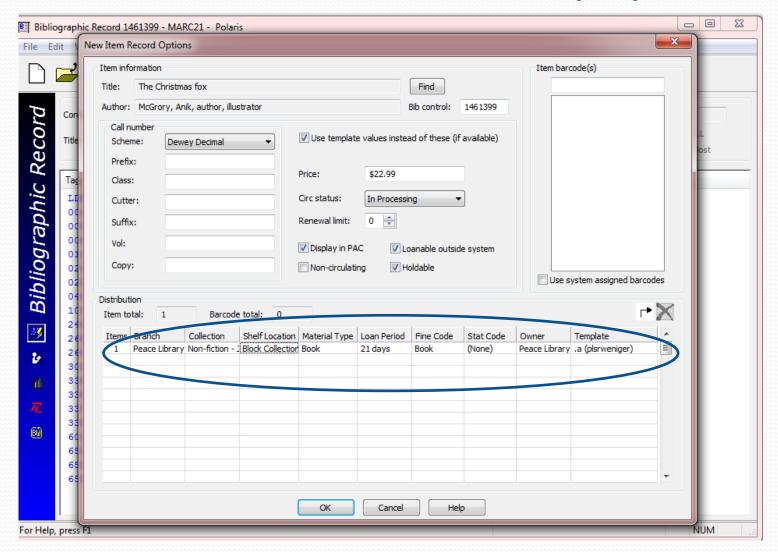
Item record – new record view



In this screen select the template you want to use. This will automatically populate the distribution fields.

Click on OK to create the item record.

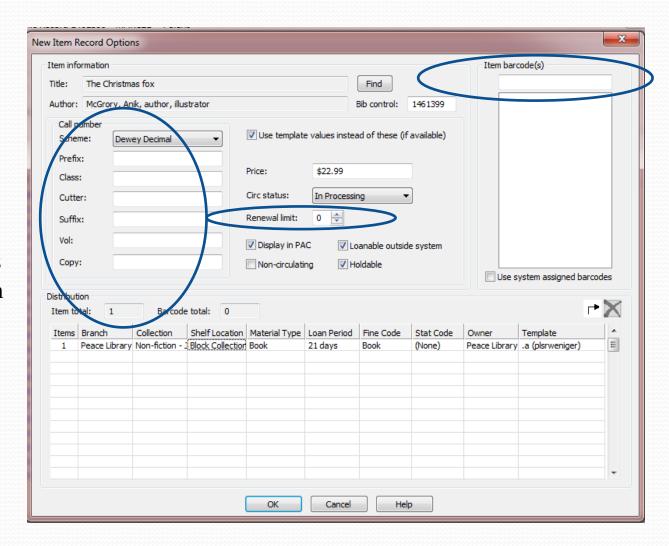
Item record with data fields populated.



Item record with data fields populated.

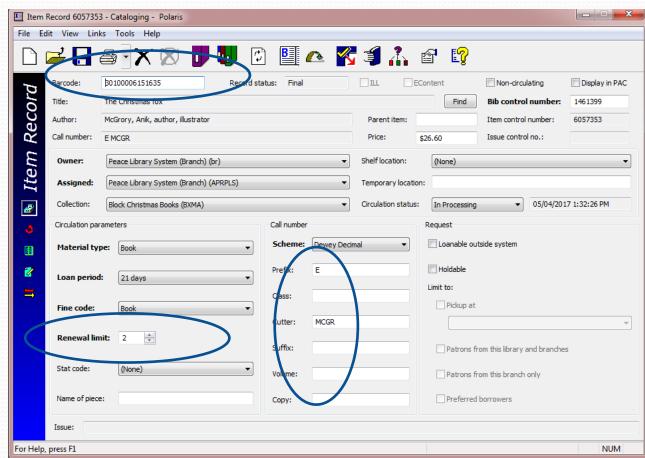
Scan in the new item barcode, enter call number information and renewal limit according to your library policy. These three details can also be done in the item record, next screen.

Click on OK to create your new Item record.



If not already done, scan in the new barcode. Although this number can be entered manually, it is best to *scan* the barcode to ensure accuracy.

Polaris recognizes an acceptable barcode format and when you are saving the record, will warn you if you have used too short or too long a number in this field. (ie: the ISBN)

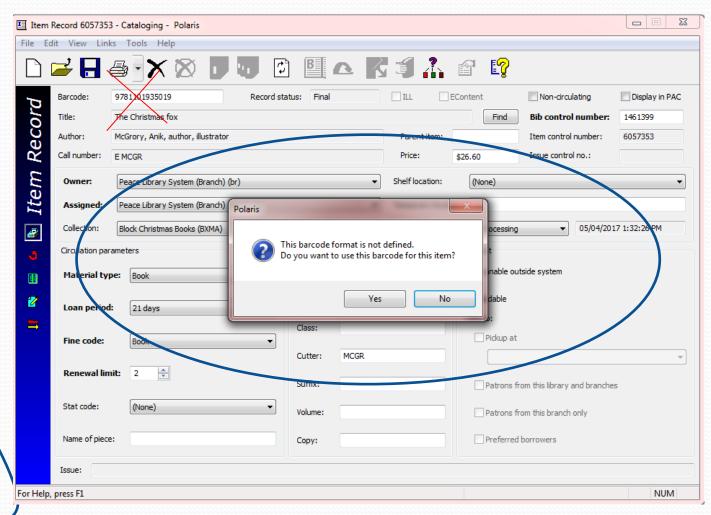


Affix the barcode on the item well away from the ISBN and the UPC codes. PLS member libraries have agreed to use the top right corner on the back cover for barcode placement.

Scan your library barcode to ensure accuracy. <u>Do not</u> scan the ISBN, as is shown here.

Affix your barcode away from the ISBN code.

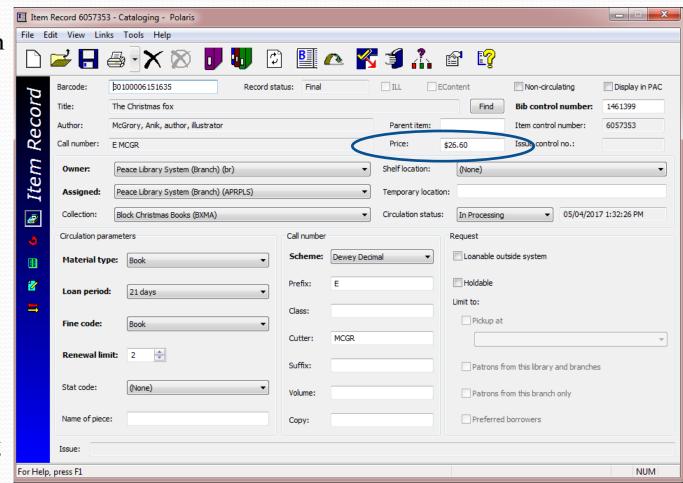




Enter the price of the item in the field shown using the following "monetary" format: x.xx (Polaris will add the dollar sign).

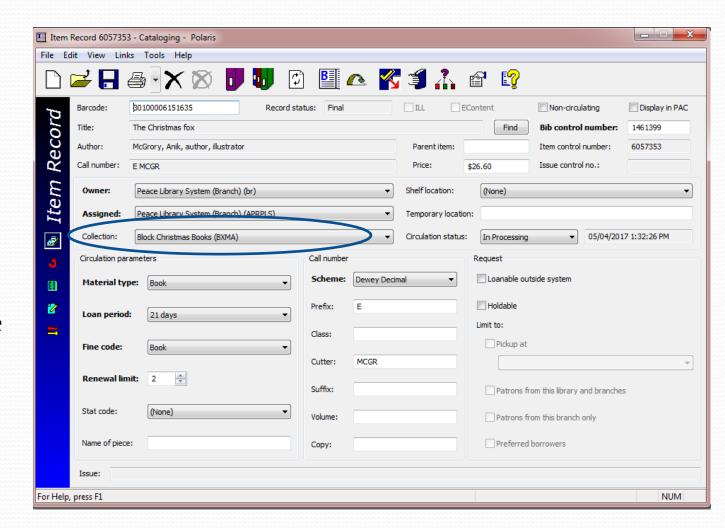
If no price is on your item, estimate a replacement cost.

The price is important if the book is lost and a patron has to be charged for the item, and for reports valuing your collection.



From the drop down list choose the appropriate collection code for this item.

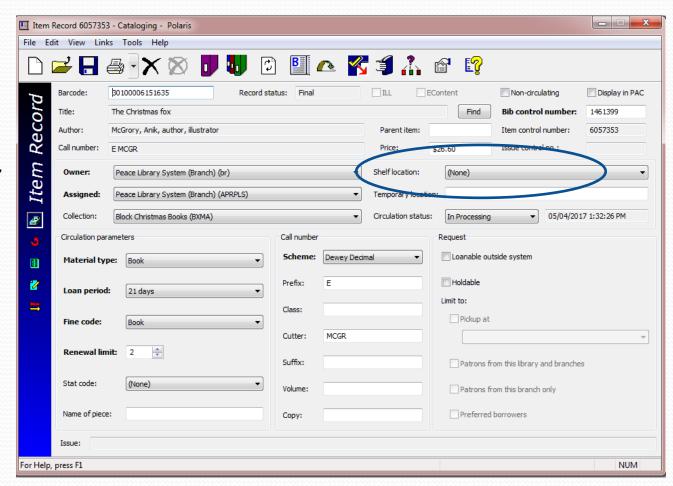
Contact your consultant if there is a collection code you would like to have, which is not on the drop down list.



From the drop down list choose the appropriate shelf location for the item.

Not all libraries use shelf location information.

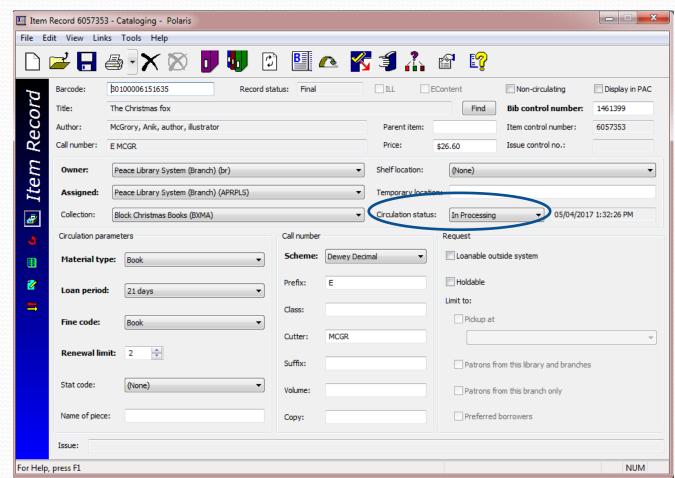
If you do, and there is a shelf location you would like to have on your drop down list, contact your consultant.



Note the default circulation status of a new item record: "In Processing".

Do not change this drop down choice from "In-processing".

Use a Check In screen to "check-in" the item after you are finished saving it, so that any holds placed on the Bib record can be satisfied.



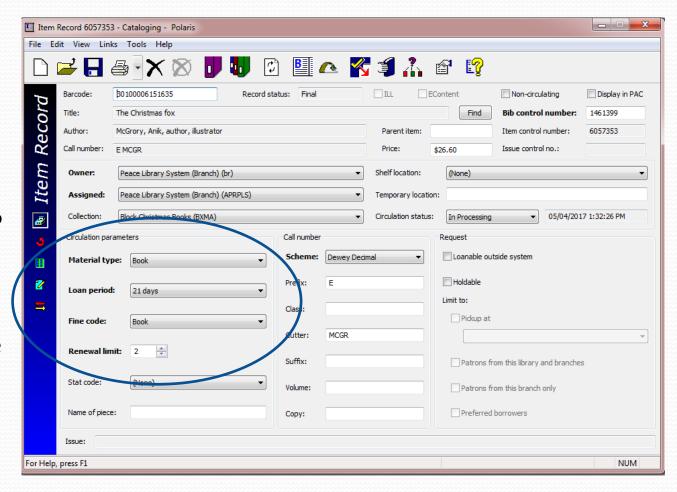
Next, select the correct "Circulation Parameters" for the item. Your template may have populated these fields already.

Notice how often Polaris provides drop down boxes to populate database fields!

This is to prevent typing mistakes – databases perform best when fields are accurately filled in!

Choose the correct:

- ➤ Material Type
- Loan Period
- > Fine Code
- > Renewal Limit

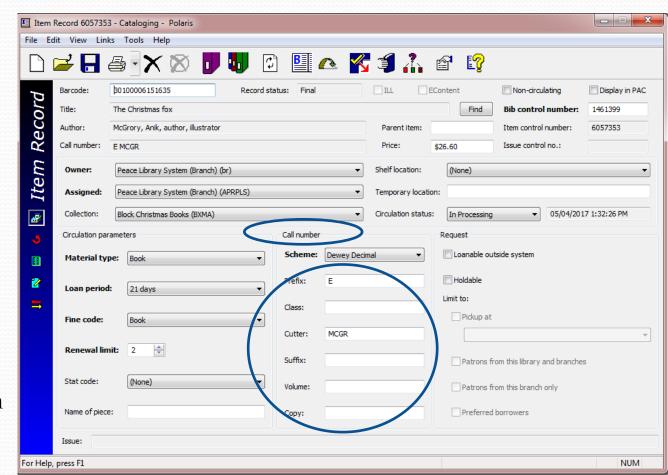


Material Type and Fine Code are always the same.

Finally, fill in the call number information, before saving your new item record!

These fields will create the spine label for your item, and there are no drop down menus to ensure accuracy!

Each field should ONLY contain the data it is designed for if the search engines are to work properly. BE CAREFUL!



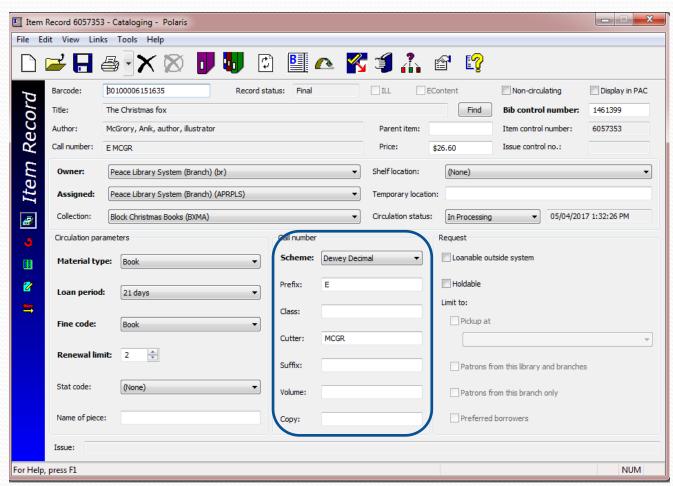
Scheme: Dewey Decimal.

The scheme should not be changed – TRAC currently uses this classification system throughout the entire collection.

Prefix: Enter the correct prefix for the item as used for similar items in your library. Use CAPITAL letters and do not enter *unnecessary* spaces in this field.

Prefix examples:

- -FIC (Fiction)
- -F (Fiction)
- -E (Easy)
- -LP (Large Print)

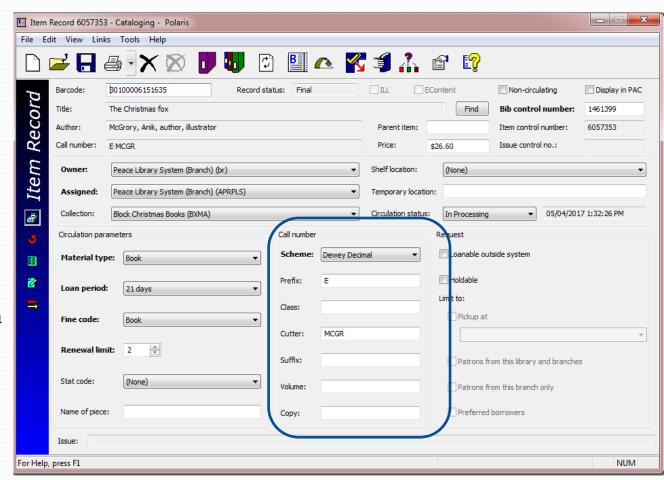


Enter the Dewey Decimal Classification Number in the "Class" field, if applicable. Typically this field is NOT used for Fiction nor for Easy Non-Fiction.

Use the following format: xxx.xxxxxx Use no spaces, and no other characters between the digits.

Some libraries abbreviate to a maximum of three digits after the decimal point, others use all.

The class field should never end in zero (0). If there are only three digits, leave off the period. (ie: 379)

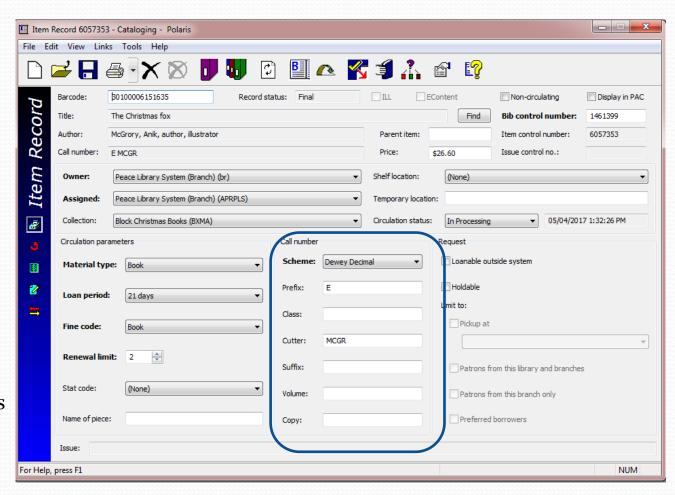


Enter the "Cutter" - If the item has an author in the author field at the top of the work form, use the CAPITALIZED first three letters of the last name.

If there is no author, as is the case in some multi-authored publications, use the *CAPITALIZED first three* letters of the title.

In this example, McGrory is the last name so a four letter cutter, MCGR is correct. This is the practice for all names starting with Mac or Mc.

Again – no spaces and two to four CAPITAL letters only should be used in this field.



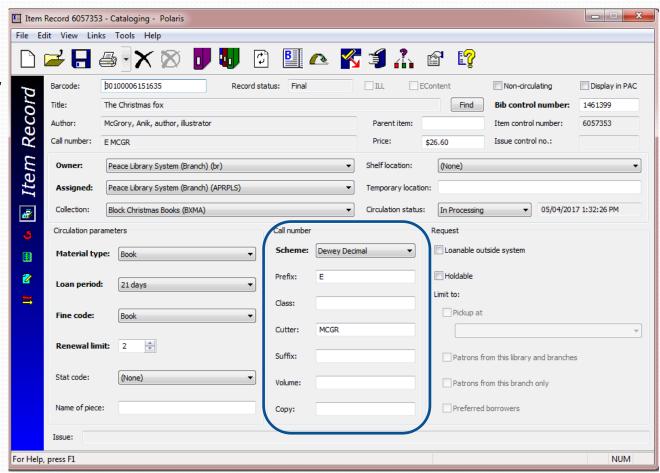
Enter the "Suffix", if used.

The suffix field is not used for sorting by Polaris, so formatting issues are not stringent. It is still good practice to use internal standards so your spine labels look orderly. Lowercase characters are acceptable in this field.

Some example suffixes found in the TRAC database:

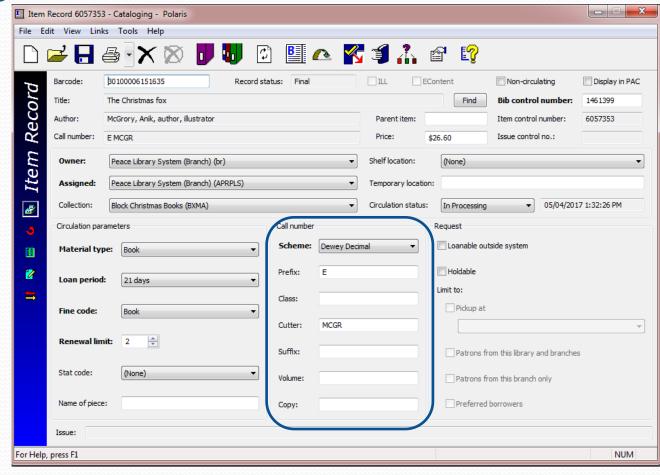
k-2 Season 1 Gr. 5-7 c.2

V.3



The volume field is a particularly sensitive field. It is used for multiple part (multi-part) publications. This book is complete in one volume, so no volume information is required. Keep your cursor out of this field!

The guidelines for usage of the volume field will be covered in part two of "Creating and Editing Item Records".



If you enter something in the volume field by mistake, be sure to fully delete the contents because the field is "space sensitive". (Even one space will disrupt Polaris search processes - backspace your cursor to remove "spaces".)

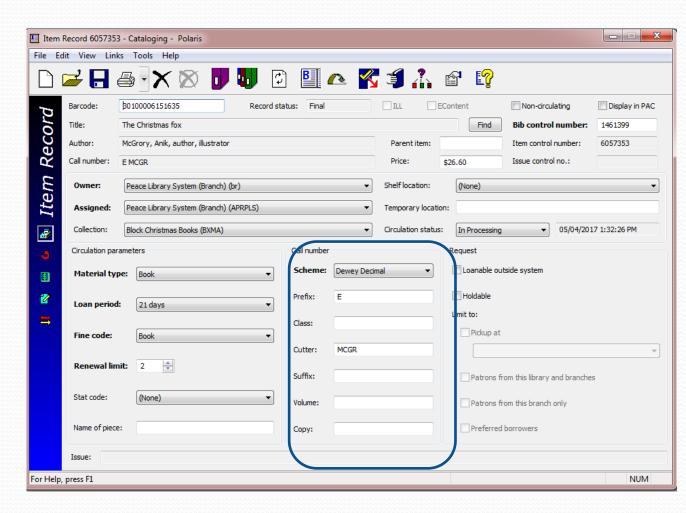
Complete the "Copy" field, if necessary. Usually, if you have only one copy of this book in your library, this field is not necessary.

The standard format for this field is "lower case c", followed by a period, and then the copy number. No spaces allowed:

C.1 Or C.2

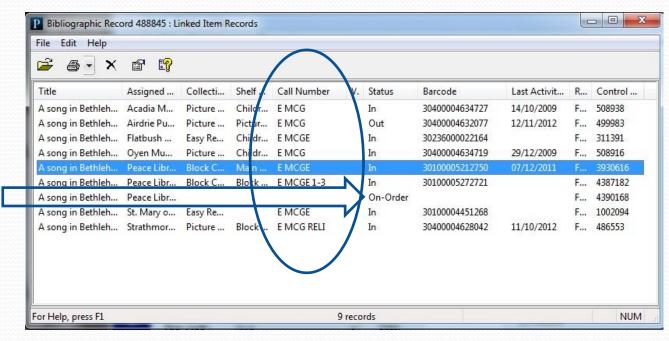
When adding a second copy, it is good to edit the item record for copy 1 with copy information.

"Editing" is covered in part two of "Creating and Editing Item Records".



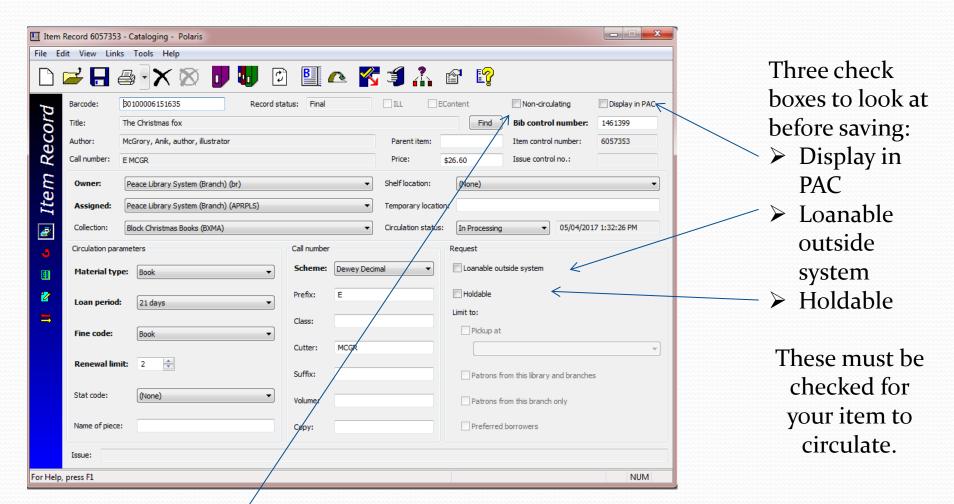
At this time, Polaris does not show the copy field in the list of linked items attached to a Bib record, unless the copy information is added to the suffix field.

If it is important to have this detail on your reports, and in this list, please use the same format (c.#) in the suffix field for your copy number.



Note the "on-order" record on this list of items linked to Bib #488845.

NEVER open and edit this record to create the item you are adding to the database.



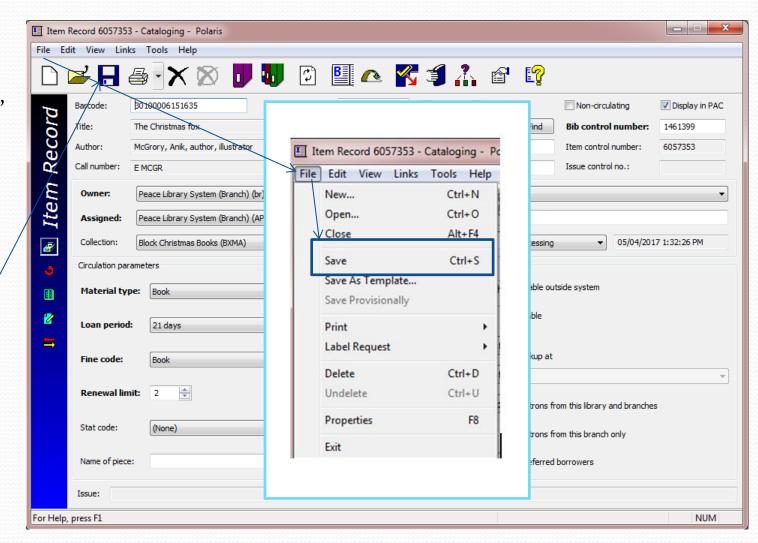
Do **NOT** check non-circulating, **unless** the item is **not** meant to circulate according to the TRAC Operational Guidelines.

Three ways to save:

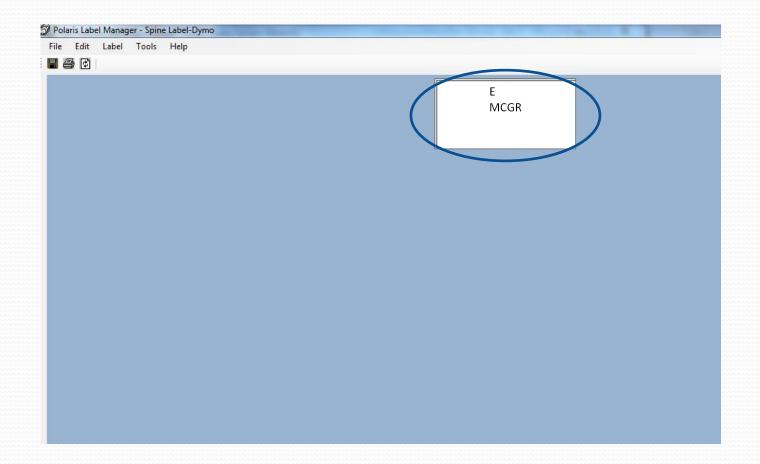
- Choose "Save" from the File Drop down menu
- Click on the "save" icon.



 \triangleright Ctrl + s



Print the spine label.

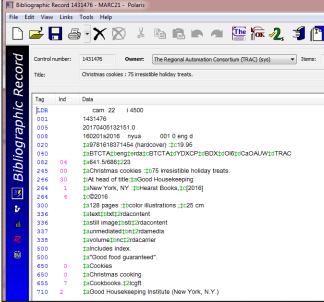


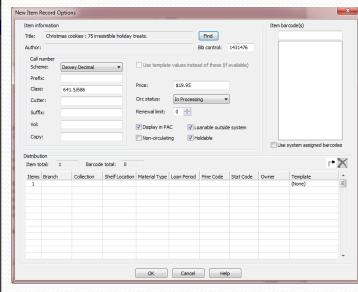
Review the Three Step Process

Follow this three step process every time you add an item record:

- Examine the item in hand.
- Find the correct Bib record by searching for the ISBN, and keep referring back to the item to ensure accuracy.
- Create a correct item record, and save it.







Step one:

- Examine the item in hand scan the 13 digit ISBN found on the back cover to find a Bib record, using a Bib find tool, to search.
- If there is an ISBN, and you do not find a record, send the book to headquarters for cataloguing.
- The ISBN may also be found in the information behind the title page.



Step two:

 Compare your item to the Bib details. Check: format, number of pages, edition (large print).

 Cataloguers rely on the title page (rather than the book cover, or spine) to ascertain the correct title, sub-title and

author.





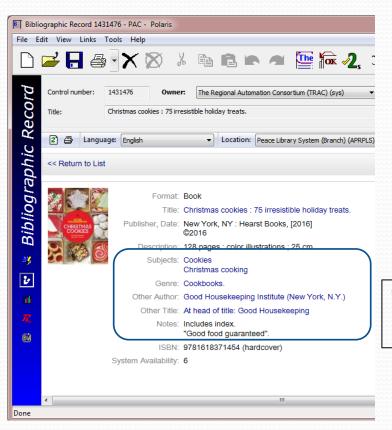
Title & sub-title may or not be on the cover. Cataloguers use the title page in creating a Bib record. (245 tag in the MARC view)

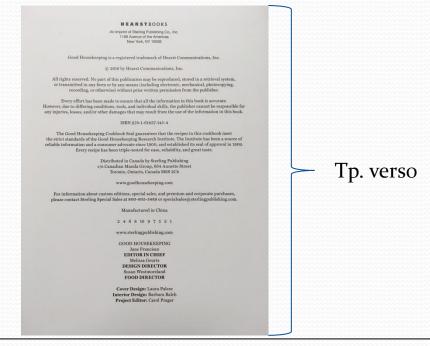
The physical description of the item (# of pages, size, illustrations, etc.) should describe the item in hand.
(300 tag in the MARC view)

Check the subject headings and other information on the Bib record.

Also look at the Tp. Verso (reverse side of the title page) for subjects,

classification and other details.





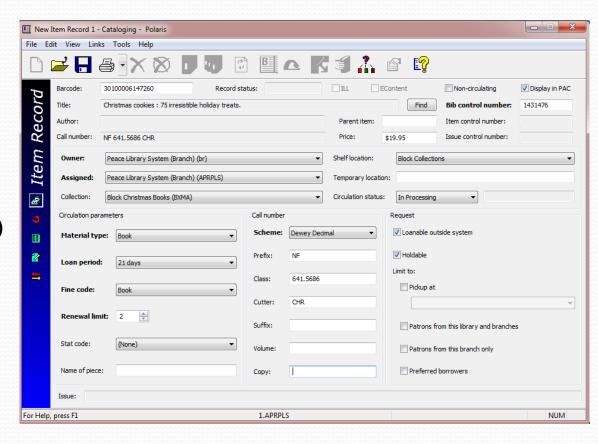
This Bib record is a perfect match for this new item! Now to add the item by creating a new item record.

Click \rightarrow



Step three:

- Create a correct item record, and save it.
- i) Affix and scan your barcode
- 2) Add the price
- 3) Choose collection code and shelf location
- 4) Choose the four circulation parameters from the drop down menus
- 5) Add prefix (NF) (if required)
- 6) Remove the slash (/), spaces or punctuation marks from the class field
- 7) Type in the cutter (CHR)
- 8) Confirm the three check boxes on the right
- 9) Save the record and check in your new holding!



Now Bib record 1431476 has a new item link!

Audiobook, item in hand:

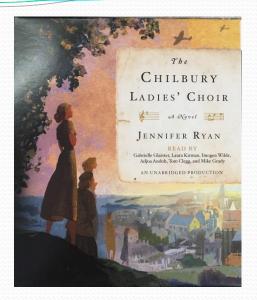
Details to find:

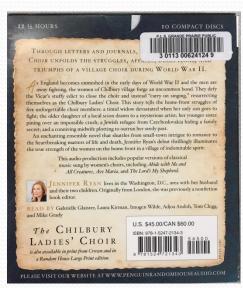
- Title (and subtitle)
- Author
- Narrator
- The full book or an *abridgement*?
- Number of discs
- Number of hours
- Publisher

Search by:

Search by ISBN whenever possible.

Multiple results are common! Take time to examine each Bib thoroughly.



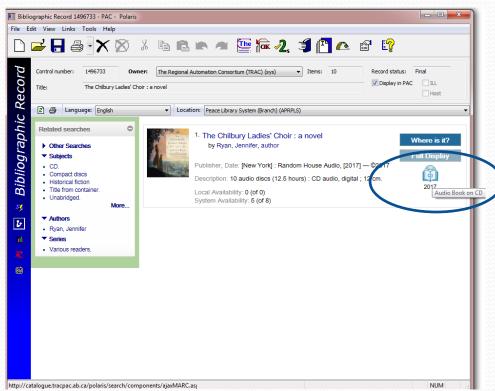


Audiobook, Bib record:

Details to find:

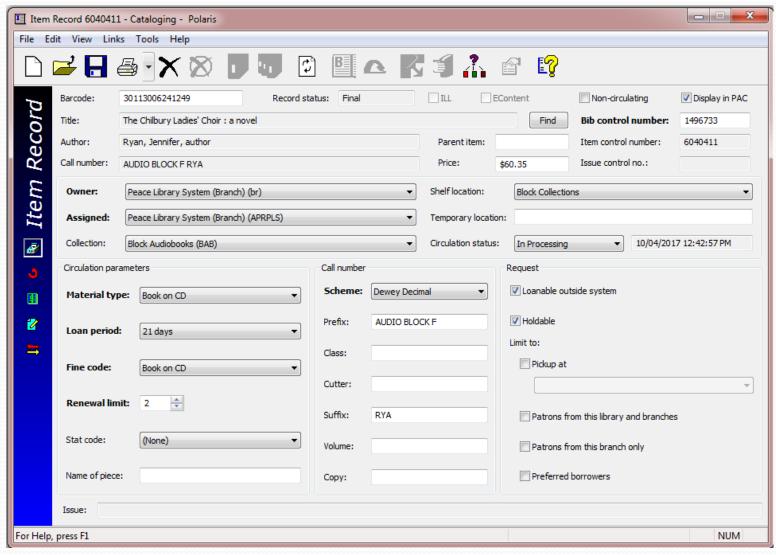
- Audiobook format icon
- Title (and subtitle, if there)
- Author and Narrator
- The full book or an abridgement?
- Number and size of discs
- Number of hours
- Publisher & publication date

Do not link to Bib 1496733, unless all the details are correct, for the audiobook you are adding!



Use the scroll bar in the MARC view and " Expand All" in the PAC view to find more information about this Bib record.

Audiobook, item record:



Blu-Ray, item in hand:

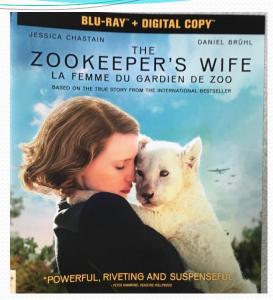
Details to find:

- Title (and subtitle)
- Cast
- Format
- Number of discs
- Number of hours
- Publisher

Search by:

Search by scanning the UPC code, (choose UPC from the search parameter drop down menu).

For Blu-Rays and DVDs you may also search by title. For a match watch for film distributor, languages and number of discs.





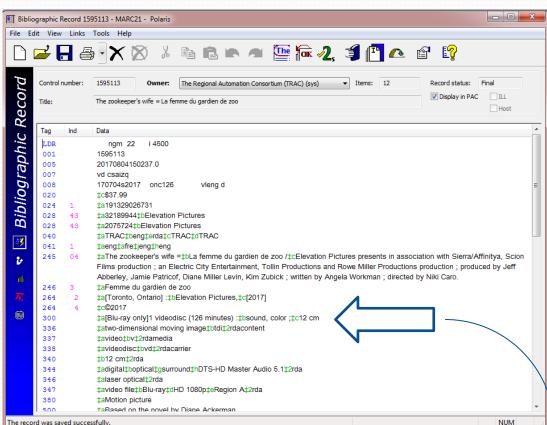
Blu-Ray, Bib record:

Details to find:

- Title (and subtitle)
- Language
- Producer and director
- Special features per cover detail
- Number and size of discs
- Number of hours
- Publisher and year
- Format DVD or Blu-Ray

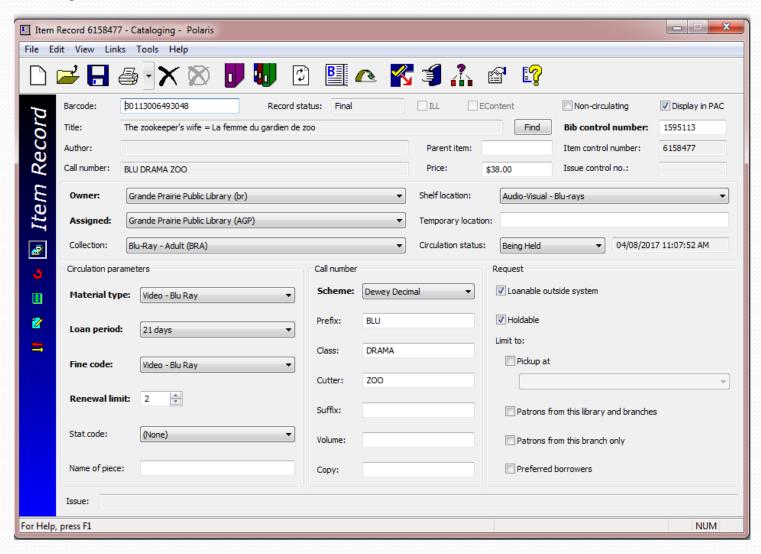
Multiple formats:

If your movie contains multiple formats (DVD and Blu-ray or MP3) you must watch the next part of "Creating and Editing Item Records" before adding your item!



Should a DVD movie or a Blu-Ray/DVD combo-pack be linked to this Bib record (# 1595113)? ... NO!

Blu-Ray, item record:



Quiz

1. Name the "author" and "publisher" of ISBN # 9781501131424?

2. What is the "format" and the "Bib control #" of ISBN # 9781250132604?

3. Who is the "publisher" and what is the "physical description" of ISBN # 0788859544?

- 4. In an item record screen which three fields are automatically populated by the Bib record:
 - a) Material type, owner and title.
 - b) Title, author and bib control number.
 - c) Title, circulation status and fine code.
 - d) Barcode, title and Bib control number.

- **5.** What are the three steps for adding an item record?
 - a) Read the title, search for the item by title, and find an item record to use.
 - b) Examine the physical copy, find a matching Bib record, create a new Item record.
 - c) Look for an ISBN, scan it, pick a Bib record with no links, and add the item.

- **6.** Which Item record fields are space sensitive?
 - a) Suffix and Shelf location
 - b) Fine code and Collection code
 - c) Volume and Classification

- 7. Which Item record fields <u>must</u> be CAPITALIZED?
 - a) Suffix and Copy
 - b) Cutter and Prefix
 - c) All of the above.

Quiz questions...

- Name the "author" and "publisher" of ISBN # 9781501131424?
- 2. What is the "format" and the "bib control #" of ISBN # 9781250132604?
- Who is the "publisher" and what is the "description" of ISBN # 0788859544?
- In an item record screen which three fields are automatically populated by the Bib record:
 - a) Material type, owner and title.
 - b) Title, author and bib control number.
 - c) Title, circulation status and fine code.
 - d) Barcode, title and Bib control number.
- 5. What are the three steps for adding an item record?
 - a) Read the title, search for the item by title, and find an item record to use.
 - b) Examine the physical copy, find a matching Bib record, create a new Item record.
 - c) Look for an ISBN, scan it, pick a Bib record with no links, and add the item.
- 6. Which Item record fields are space sensitive?
 - a) Suffix and Shelf location
 - b) Fine code and Collection code
 - c) Volume and Classification
- 7. Which Item record fields must be CAPITALIZED?
 - a) Suffix and Copy
 - b) Cutter and Prefix
 - c) All of the above.

Please try for 100% in this quiz before proceeding to Part two of "Creating and Editing Item Records".