

Chapter 16 -- Creating Records in Evergreen

New MARC records may be created in Evergreen Indiana. On-order records, temporary records, and Equipment records are the main uses for creating records. Original cataloging should be done in Evergreen only if there is no record available for your title from any of your available sources of bibliographic records.

On-order records are added to the system to allow patrons to see what has been ordered and place holds. These should display in the OPAC, and only one on-order record should be created per title. If there is already an on-order record or full bibliographic record for that title, simply add your holdings to that record. Do not create a new one.

Temporary records are records which are created as a place holder when a full bibliographic record is unavailable. This allows items to be circulated until the cataloger can make time to fully catalog the item, or until a record becomes available. Temporary records should be *temporary!* Temporary records must be replaced with a full bibliographic record within 90 days. It is recommended that catalogers create a bucket to keep track of temporary records.

Temporary records should not be shadowed, because someone else in the consortium may replace the record with a full bibliographic record. That is one of the beauties of a consortial environment.

Equipment records are used for items such as laptops, projectors, baskets, totebags, etc. These records should not display in the OPAC.

Creating On-order Records

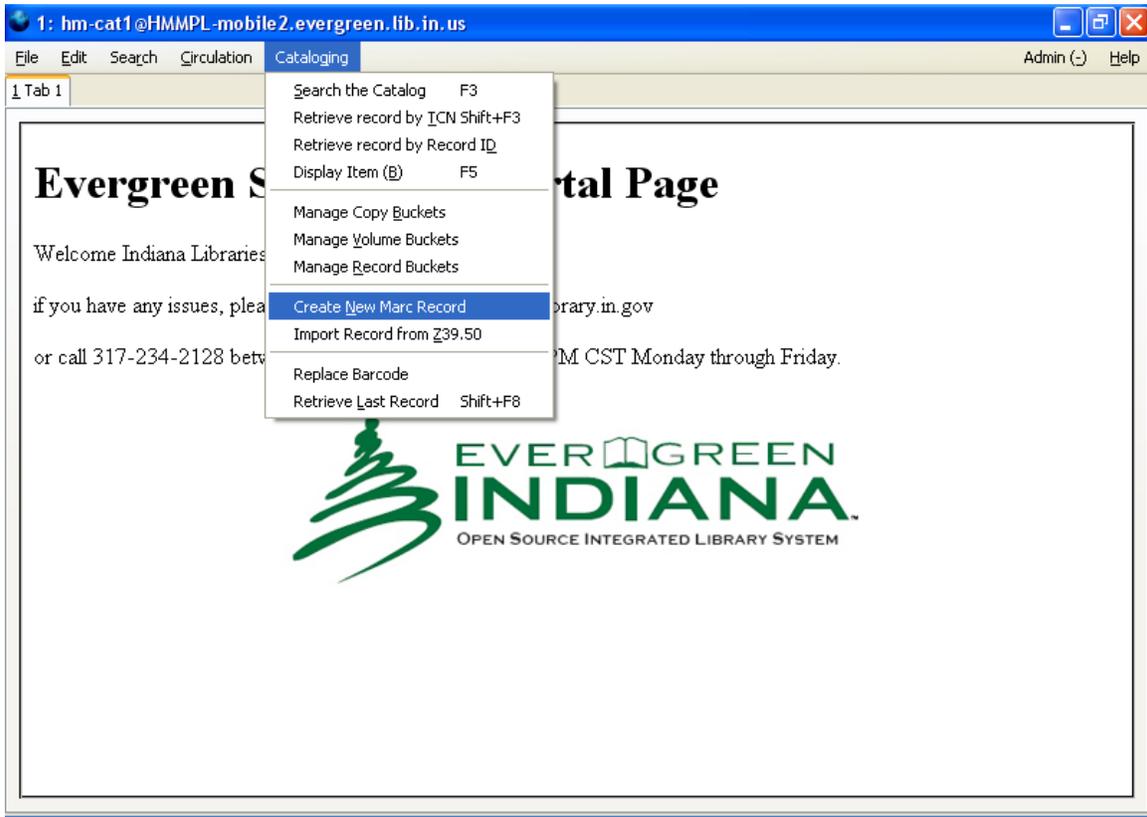
At this time, on-order records cannot be batch loaded from a vendor. Currently a batch load function is not available in Evergreen Indiana, because this would lead to many duplicate records in the system. If you wish to add on-order records, it is necessary to check EI for the record, just as you would for adding a bibliographic record. If there is no record in the system, you may create one, or it may be possible to import one via Z39.50.

If you have determined there is no record for your on-order item in EI, and a record is not available from your vendor or bibliographic record supplier, you can create one. It is not necessary to create your own on-order record, if a record for that item is already available, that just creates extra work for you.

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To create an on-order record, go to the **Cataloging (Alt + G)** menu in the toolbar, and select **Create New Marc Record (Alt + N)**.

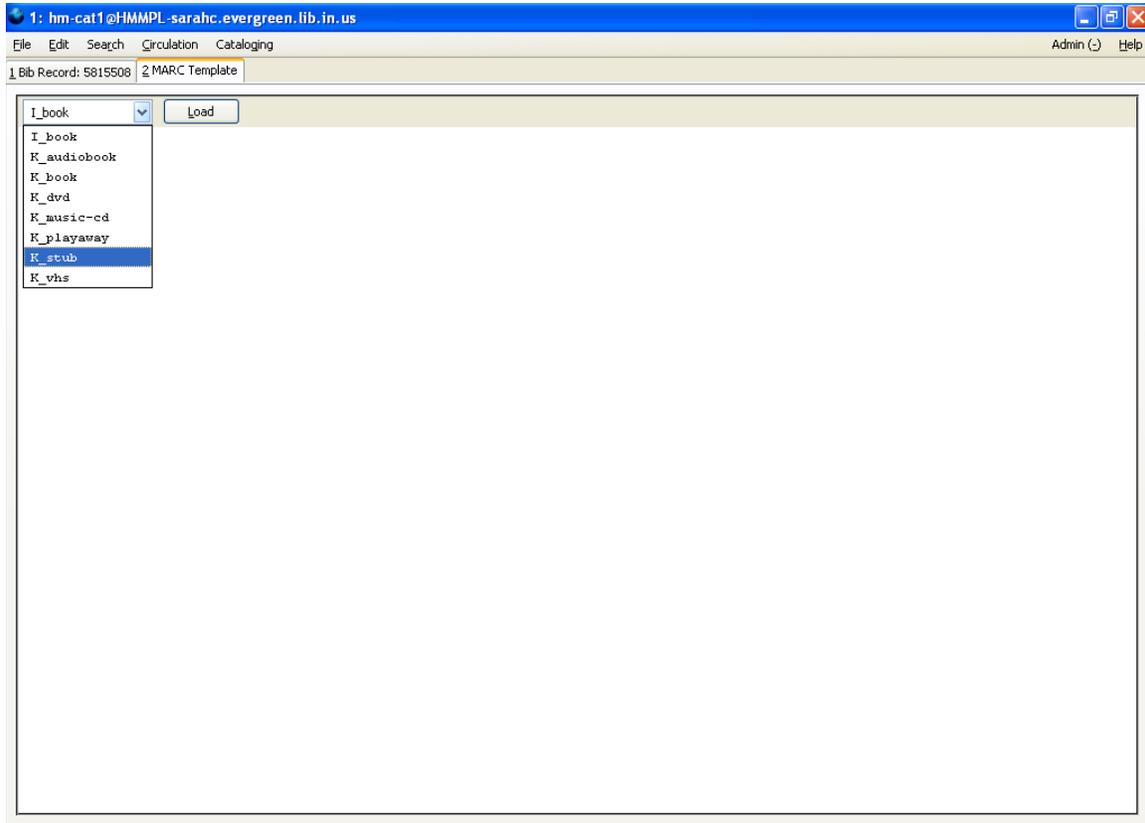


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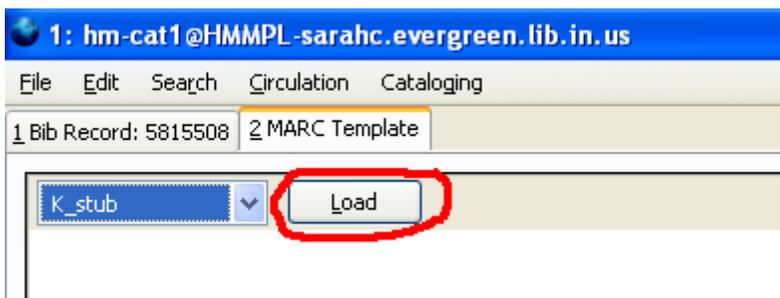
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The MARC Template screen will appear with a drop down menu. Select the appropriate template for the item you have. For books, choose **K_stub**.

If the item you are adding is not a book, it is important to choose the correct record template. K_dvd for dvds, K_audiobook for audiobooks, etc. This will make the correct icon display in the OPAC. Since there may be on order records for multiple manifestations of the title, this makes it much more clear that the records are different.



When your selection is displayed in the box, click on the button labeled **Load (Alt + L)**.



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A MARC record template will load:

The screenshot shows the Evergreen cataloging interface. At the top, the browser window title is "1: hm-cat1@HMMPL-sarahc.evergreen.lib.in.us". The menu bar includes "File", "Edit", "Search", "Circulation", and "Cataloging". The toolbar has "Admin" and "Help" buttons. The main content area is titled "Options" and contains a "Stack subfields" checkbox, "Validate", "Create Record", and "Help" buttons. Below this is the "MARC Record" section, which includes a "Fixed Fields -- Record type: BKS" table and a list of MARC fields.

Type	a	ELvl	K	Srce	d	Audn	Ctrl	Lang	eng
BLvl	m	Form		Conf		Biog	MRec	Ctry	
		Cont		GPub		LITF	Indx		
Desc	a	Ills		Fest		DtSt	s	Date1	Date2

The MARC fields list includes:

- LDR 00620cam a2200205Ka 4500
- 008 070101s eng d
- 010 #a
- 020 #a
- 082 0 4 #a
- 092 #a
- 100 #a
- 245 #a #b #c
- 260 #a #b #c
- 300 #a #b #c
- 500 #a
- 599 #a Field in which to put information about the record (ON-ORDER RECORD, TEMPORARY RECORD, EQUIPMENT RECORD)
- 650 #a #v
- 650 #a
- 700 1 #a

You will now enter the information for your temporary record. Notice that there are fields for the author, title, LCCN, ISBN, place, publisher, date, and physical description. This information should be filled in as completely as possible. Your vendor and Amazon.com are great resources for providing this information for on-order titles. At a minimum, supply the available information in the 1xx and the 245, as well as the 020, 022, or 024, as applicable. If the information is incompletely filled in, it will be difficult for other catalogers to know if their item matches your record. This may create more work for you later if you are asked to track down the item to supply further information, or it may result in unnecessary duplicate records. If the information is available, also fill in the 250, 260, and 300 fields.

For a temporary on-order record, a 599 field labeled ON-ORDER RECORD is required. Note that the 599 field on the record template reads: Field in which to put information about the record (ON-ORDER RECORD, TEMPORARY RECORD, EQUIPMENT RECORD)

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Delete all the text from this line except the appropriate label, in this case “ON-ORDER RECORD.”

The screenshot shows a web browser window with the URL `1: hm-cat1@HMMPL-sarahc.evergreen.lib.in.us`. The browser's address bar shows the URL. The page title is "Bib Record: 5815508". The interface includes a menu bar with "File", "Edit", "Search", "Circulation", and "Cataloging". There are buttons for "Validate", "Create Record", and "Help".

The "MARC Record" section is titled "Fixed Fields -- Record type: BKS". It contains a table with the following columns: Type, a, ELvl, K, Srce, d, Audn, Ctrl, Lang, eng. The table is mostly empty, with some data in the "Type" and "a" columns.

Below the table is a list of MARC fields:

Type	a	ELvl	K	Srce	d	Audn	Ctrl	Lang	eng
BLvl	m	Form		Conf		Biog	MRec		Ctry
Desc	a	Ills		GPub		LitF	Indx		
				Fest		DtSt	s	Date1	Date2

The MARC fields are:

```
LDR 00620cam a2200205Ka 4500
008 070101s          eng d
010 #a
020 #a 1416584080
020 #a 9781416584087
082 0 4 #a
092 #a
100 #a King, Stephen,   #d 1947-
245 #a Just after sunset : #b stories / #c Stephen King.
260 #a s.l. : #b Scribner #c 2008.
300 #a 384 p. : #c 24 cm.
599 #a ON-ORDER RECORD
650 #a #v
650 #a
700 1 #a
```

Click on the button labeled **Create Record (Alt + D)**. A dialog box will pop up telling you the record has been created.

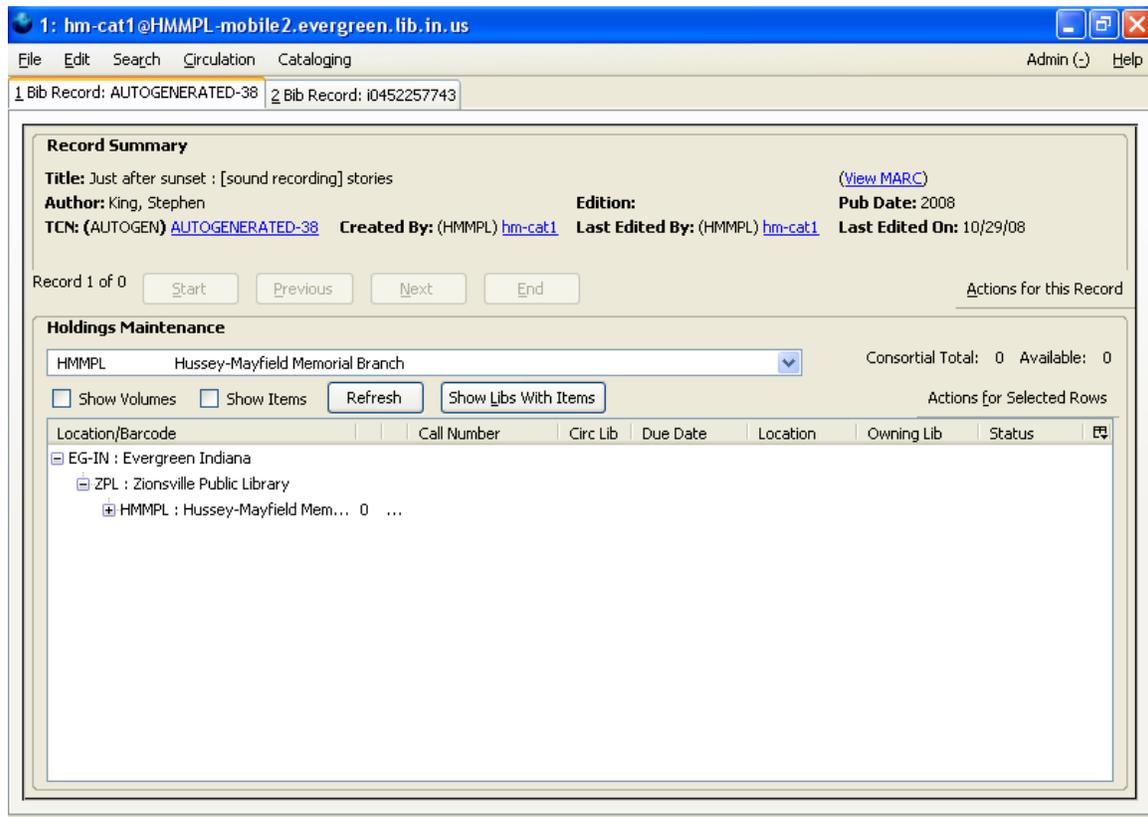


Then click **OK** or press **Enter**.

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The new record will open up in your tab in the current default view. You can add holdings at this point.



If you do not add holdings to the on-order record, the record will not be visible in the OPAC, so your patrons will not be able to place holds on the title. Please refer to **Chapter 5 -- Adding Holdings**, if necessary. It is recommended that you assign a call number such as "On order" to make it clearer that the item is not yet available.

When you add your holdings, the item will automatically be given a status of In process, unless you apply a template with an On Order status. To create an On Order item template, see **Chapter 6 -- Templates**. Particularly note the **Identification Column** section on page 6.4

If you do not create an On Order item template, you will need to change the status of these items to On Order. See page **Using the Copy Editor to Make Changes** on page 7.1 to change one item, or **Using the Item Status Screen to Make Changes to Multiple Items** on page 15.4, if needed.

If you are the first library to receive a copy of a title which has an On-Order record in EI, you will need to replace the On-Order record with a full bibliographic record. You will do this by overlaying the record with a full record from your

bibliographic record provider. See **Chapter 13 -- Overlaying Records**, if necessary.

Creating Temporary Records

When adding a temporary record, you will follow the same steps as adding an On-order record, with a few exceptions. Rather than selecting for the K_stub form for books, you may wish to choose I_book. This will make it easier to upgrade the record to a full record later if an appropriate record to overlay the temporary record does not become available.

Edit the 599 line to read TEMPORARY RECORD rather than ON ORDER RECORD. If you use the I_book form, add the 599 beneath any other 500 fields by putting the cursor in the line above the place where the 599 will be inserted. Hit **Control + Enter**. The new line will appear; enter the appropriate text, including 599 in the field name box.

You will *not* need to change the item status to On Order.

You will add the Record to your Temporary Records bucket. If you do not currently have a bucket for temporary records, see **Chapter 17 – Introduction to Buckets**. Since temporary records are only to be used temporarily, adding them to a specific bucket will allow you to track and review your temporary records so that a record can be replaced with a full bibliographic record if one becomes available. If a full bibliographic record does not become available within 90 days, you must create the full record.

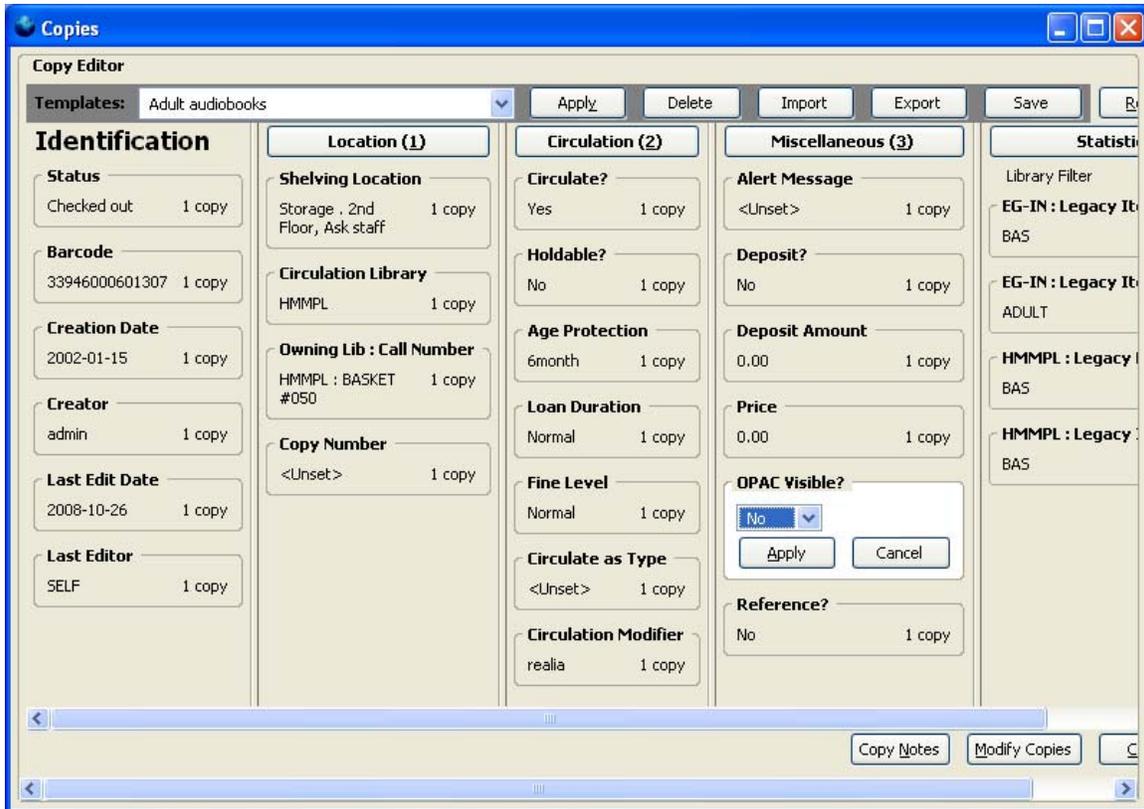
Full bibliographic records must contain all information required by Evergreen Indiana cataloging standards. Please refer to the Evergreen Indiana Cataloging Policy and Evergreen Indiana Cataloging Procedures Guide for further information.

Creating Equipment Records

The process of creating equipment records is the same as creating on-order or temporary records. Describe the equipment according to your local standards.

Equipment records should *not* be visible in the OPAC.

To shadow a record, all items attached to the record must be shadowed. Items are shadowed from the Copy Editor. This should be done when the item is created. If you are shadowing equipment records which have been migrated into Evergreen Indiana, it is still done with the Copy Editor. It can be done item by item from the Holdings Maintenance screen or in groups using the Item Status screen or buckets.



In the **Miscellaneous** column, click on **OPAC Visible?** Select **No**. Then click **Apply (Alt + A)** and click **Modify Copies (Alt + M)**.

Creating Original Records

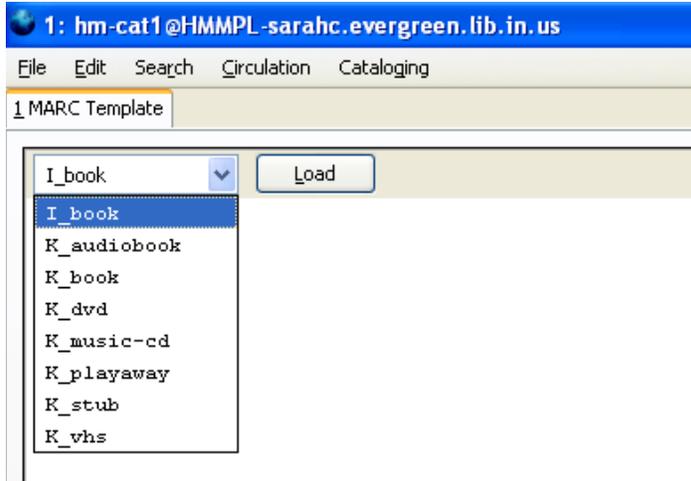
If you use OCLC as your bibliographic record source, please do your original cataloging in OCLC, and then import the record into Evergreen Indiana via Z39.50. If you don't have OCLC and you think it's likely that another library has the same title, you might put a call out on the listserv for someone else to import or catalog the record. This is especially true for AV materials. Do not hesitate to consult the listserv if you need assistance in creating an original record. Please take advantage of the pool of experience at your disposal. Improving the quality of the records in the database benefits everyone.

Do not forget about the option of adding temporary records. Before you use your valuable time creating an original record for an item, particularly common and popular items that are likely to be added to OCLC, remember that you can add a brief temporary record. See **Creating Temporary Records**, page 16.8. Your temporary record may well be overlaid before you check it again.

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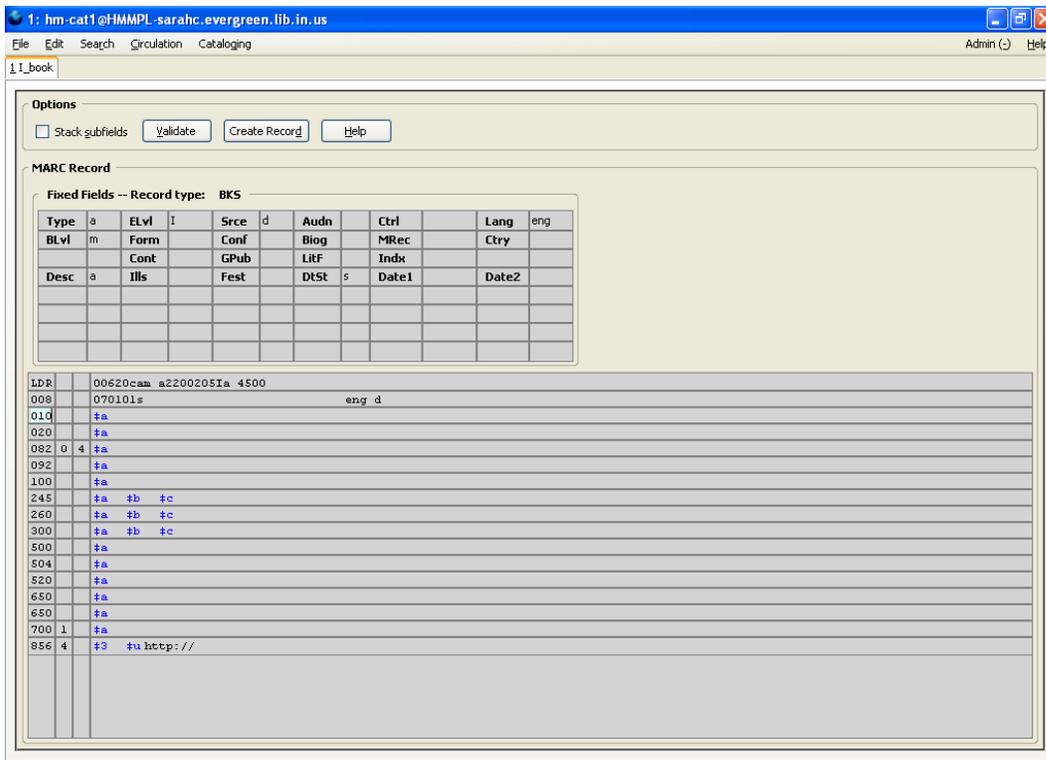
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If you have a more unusual item, create an original record by selecting the appropriate record type for the item from the drop down list. More record types will be coming, so if you do not see the type you need, contact a member of the Cataloging Committee.



When your selection is displayed in the box, click on the button labeled **Load (Alt + L)**.

A MARC record template will load:



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Fill in the template as completely as possible, and delete fields which do not apply to your item. Do not forget to fill in the appropriate information in the fixed fields. Please refer to the ***Cataloging Procedures Guide*** for further information on the fields required in Evergreen Indiana. For questions on how to fill in a particular field or what a particular field is for, please refer to Bib Formats and Standards, which is available online at <http://www.oclc.org/bibformats/>, and the AACR2. You can also consult the listserv or member of the cataloging Committee with cataloging questions. See ***Chapter 14 – Using the Marc Editor*** for further information on how to edit the MARC record.

When you are finished creating your record, click on the button labeled **Create Record (Alt + D)**. A dialog box will pop up telling you the record has been created.



Then click **OK** or press **Enter**.

The new record will open up in your tab in the current default view. You can add holdings at this point. If you need to make additional changes to your record at this point, refer to ***Chapter 14 – Using the Marc Editor***.