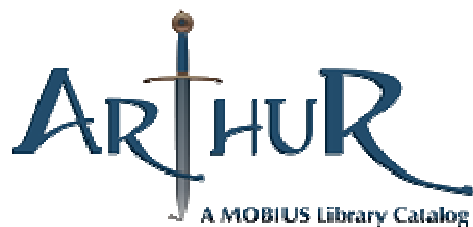
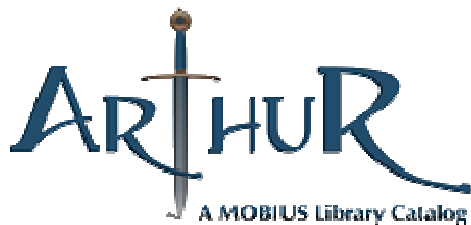


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Coordinators Charge

Arthur Coordinators & Technical Services (CTS) Committee Charge

The charge to the Arthur CTS Committee includes, but is not limited to, the following responsibilities:

- Understand all modules of the III system, as they affect the individual libraries and the Arthur cluster.
- Be knowledgeable about III upgrades and work with MCO to schedule upgrades to Arthur.
- Evaluate the effect of system enhancements, solicit input from cluster members and provide recommendations to the Arthur Directors Committee.
- Coordinate or provide training on III system for cluster library staff.
- Identify ways cluster members can share resources and collaborate to share expertise.
- Report committee activities to Arthur Directors Committee for approval by sending meeting minutes to the chair of the directors committee within two weeks after the meeting. Post approved minutes within 30 days on the MCO web site.
- Submit committee recommendations for all major cluster and policy decisions to the chair of the directors committee for approval.
- Understand and apply standards to Arthur records and make recommendations for cluster decisions in this area.
- Provide quality control for Arthur records, including authority control, serials control and elimination of duplicate records.

Statement of Reporting Structure:

All proposed policies and other recommendations must be submitted to the Arthur Directors Committee for approval.

Membership:

Each institution may have multiple representatives, but only one vote.

Committee Representative Qualifications:

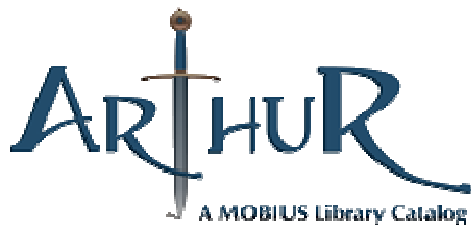
Must be employees of their respective institutions and chosen by their director.

Chair Rotation:

Beginning every July 1st, the chair rotates alphabetically by institution: Columbia, Lincoln, Missouri State Library, Stephens, Westminster, William Woods. The institution is responsible for chairing and will decide who is responsible (i.e. co-chairs, single chair). It is the institution's responsibility to communicate this to the committee.

Chair Qualifications

We have new people who are in Arthur at various times. It would seem needful to give those folks time to adjust and learn the job as well as all the technical service info. If a person has never been a Coordinator committee member, then we suggest that they are given 2 years development time before asked to be the Chair of the Coordinators Committee. If a person has been a committee member for the III system in another area then the time would not be needed via experience. It was also agreed that a person would be allowed at least 2 years passing before the Chair of the Committee would be given to them again in the situation of new individuals lacking training.



Duties of Chair:

Post meeting minutes, forward recommendations and requests to the appropriate committees or individuals. Templates are used for the various kinds of meetings. These can be found at:

<http://mobiusconsortium.org/node/252>

Frequency of Meetings:

At the first meeting, which must be between July 1st and August 15th, the committee should establish a tentative schedule for four meetings throughout the year. Two of these meetings are required to occur. Voting on issues may only occur if a quorum (4 institutions) is present.

Committee Discussion List:

ARTHUR-COORDINATORS-L@MOBIUSCONSORTIUM.ORG

Communication of the Committee Minutes:

The following applies to all Arthur meetings: Notification of meetings must be posted to the MOBIUS web calendar two weeks prior to the date of the meeting. Minutes of the meetings will be taken by the incoming chair and must be submitted to the MOBIUS Online Help Desk for posting on the MOBIUS web site within 30 days of each meeting and are accessible to any person with the proper MOBIUS permissions. Notification of posting will be sent to the appropriate consortium listserv.

Output:

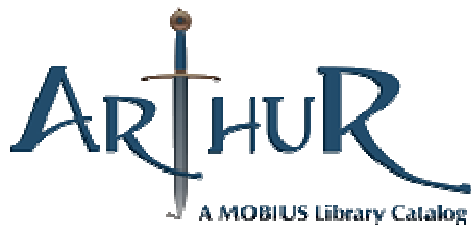
Reports and recommendations to Arthur Directors, as needed.

Section I. Standards For Bibliographic Records

Objective: All Arthur libraries agree to abide by nationally recognized standards, in order to ensure uniformity of catalog entries. Mobius has a section on their website for cataloging standards that Arthur members should be following. The link is found at: <http://mobiusconsortium.org/policies-procedures-for-ils-operations>

Create List Naming Protocol

We can use the format that Mobius has suggested in their file examples: ccmgs *22*990922 nursing videos-- with the asterisks holding the create list file number. It was also agreed that we could type the year as full or partial (e.g. 07 vs. 2007) so in our example : ccmgs *22* 19900922 nursing videos is also acceptable. It was pointed out that having the file number in the format is useful in global updating, rapid update and in shifting files in create list functions where the file number is generally not available unless it is placed in the file name itself. Placing the file number in the format is optional. We also agreed that we would name the feature list files to identify which college is assigned to those files. When a create list file is empty and initials of ownership are still on the file it is acceptable to "release" the name on the file; anyone can do this. The college owning the empty file does not need to be contacted.



The naming codes for each college would be: WD (William Woods), WC (Westminster College), LU (Lincoln University), SC (Stephens College), CC(Columbia College), MOSL (Missouri State Library).

Order Records Will Show In The OPAC For 30 Days Unless Suppressed

Order records are set to display in the OPAC for 30 days from receipt. If the item is cataloged in less than 30 days, the OPAC will show both the order and item record. Order records can be suppressed at any point in time.

Subject Headings Shall Not Be Stripped From Records

MOBIUS Catalog Design Advisory Group decided that no subject headings should be stripped from records. Even if they are not currently being used, the headings should remain in the record.

Item Records For Serial Control Or Standing Orders Will Be Suppressed And Replaced With Holdings Display

Bibliographic item records for serial control or standing orders may be suppressed from public view. A serial card can be created for the holdings display. This is to avoid the excessive listings of items that could take several pages in the OPAC.. For example, "Contemporary Authors" could have a "library has" statement listing the volumes, and all item records can then be suppressed. Multi-volume items that do not circulate (e.g., bound periodicals) should be suppressed. It will be left to the individual college as to whether they use a checkin record or an item record to show holdings. It was agreed item record suppression code "s" would be used as the permanent suppression code when items should not appear in either MOBIUS or Arthur.

Filing Indicators In Bibliographic Records

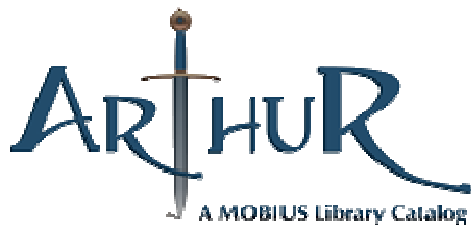
There are many titles with initial articles that do not have the correct filing indicators. Records that begin with "a, an, the, are used as an initial article but are not being retrieved properly. The MOBIUS union catalog strips leading articles. The consensus was for everyone to be responsible for correcting the wrong filing indicators in their own records, but if someone runs across an error go ahead and correct it. We will not start a 246 line with "the, and, a " unless the title really began with those words (e.g. And then there were none by Agatha Christie.)

Rapid Update Record Quantity

We need to update no more than 20,000 records on the system at one time.

New Items. Status (f)

Status (f) in item records will be used for new items that an institution will not allow for requesting for a certain period of time [30 days]. Items with status (f) can be requested thru Arthur and Mobius. As per the agreement libraries can retain their new books for 30 days and cancel holds for such during that timeframe. When 30 days is past the books need to be available for access in Arthur libraries and Mobius. Status will need to be changed to available or at least be accepting holds. Status (f) does not stop a hold from being placed. Variation exists in the cluster on this. Westminster uses the status (f) but allows anyone to place holds on the items at any time.



Merlin Standards

We will use the Merlin standards unless the cluster has made exceptions. Those exceptions will be posted on the Mobius web page.

590 Field

Place local notes in the item record when possible. MCO prefers the item record to be used in such situations. The 590 does not display in the Mobius Catalog at this time. It does show up in the Arthur catalog. 590 is not in the MARC validity table and is not part of MARC format. It is not part of the master record.

MARC Codes (country codes, language codes, etc.)

Update the MARC validity table on a regular basis. This is why validated bib records are showing up with a lot of "red" subfields. The Cluster is responsible for updating the Country Codes and Language Codes. The Cluster is responsible for the Format Validity Table.

Overlay Bibliographic Record (How not to)

Macro for 949 field tells the system to not overlay the bib

Macro tells the system to use the load table which does not overlay on the bib. Place “*recs=bta” in a 949 field in Connexion and export the record.

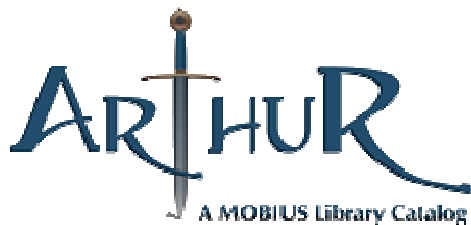
229 Field

MOBIUS Guidelines for 229 Field (Journal Magazine or Newspaper Index)

In December 2002, III created 229 fields for the MOSL records that had current holdings at that time. The journal title index is created from the 229 field. Because the 229 field is not a standard MARC tag, it must be added to catalog records so that they will be included in the journal title index. Each cluster is responsible for manually entering the 229 fields. For you add a new serial record (type p or n), use the following fields to enter new 229 fields:

- If the record has a 130 field, copy 130 as 229.
- If the record has no 130 field, copy 245 as 229.
- If the record has a 246 field, create a 229 for each 246 as needed.
- For entries that patrons cannot easily locate, an additional 229 may be created at the cataloger's discretion.

Enter new 229 tags without initial articles. Indicator values: 1st indicator blank, 2nd indicator 0 (always zero, since initial non-filing characters should be omitted). If you find an existing entry in this index that has initial non-filing characters, delete them and set the second (non-filing) indicator to zero. When cataloging a serial



that does not meet the serial type p or n, provide 229 access if judged appropriate. [referring to the 008 field tag] Retain the correct serial type in the record.

Settings Common To All Arthur Libraries (Cluster decisions)

Many of the settings in Sierra are All Arthur Cluster associated. Settings that are unique to each college would be such things as patron types, item locations, cataloging templates, and library locations. Settings that are used by every member of the cluster would be such things as item types, display codes, acquisition subject areas, system codes, etc. Settings used by All cluster members need to be approved by the cluster and then submitted by the Chair of the Coordinators to Mobius for appropriate mapping. As always play it safe and ask before modifying as many of the settings in Sierra are All Arthur.

MOBIUS Guidelines For 856 Field – Links Displayed In The OPAC

If a record has a MARC 856 field, make sure it conforms to this standard:

Add a subfield z to the MARC 856 field to add descriptive text to the link displayed in the OPAC.

Begin subfield z with the words: Connect to

Then either copy the text from subfield 3, or else compose a short text that describes the website the URL links to.

Examples:

```
856 41 |3Web version|uhttp://www.oclc.org/news/publications/annualreports/|zConnect to Web version
```

```
856 41 |3Web version|uhttp://www.oclc.org/news/publications/annualreports/|zConnect to web archive of annual reports
```

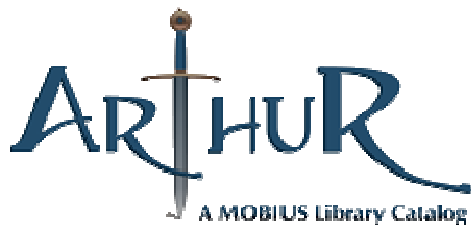
Arthur Cluster Guidelines For Updating Language And Country Codes And MARC Validity Table

Language And Country Codes

On an annual basis, check the current Library of Congress MARC standards for language and country codes. Note the dates of any changes to the code tables. If they have not been changed since the last annual check, no action is needed. If they have been changed, contact MCO to request the new tables to be downloaded.

Current URLs as of 9/30/2013 –

Languages: <http://www.loc.gov/marc/languages/>



Countries: http://www.loc.gov/marc/countries/cou_home.html

MARC Validity Table

If anyone notices an unusual number of invalid MARC fields or subfields in new downloaded records from OCLC (invalid fields are marked in red), it may mean that the MARC Validity Table needs to be updated. Contact MCO to request the new table to be downloaded.

NOTE: Some fields will always be red, either because they are obsolete, or because they are non-standard local use fields (e.g. the 970 table of contents field). Disregard these fields when looking for this issue.)

N.B. Individual fields may be added or updated within the validity tables. This can only be done in the character-based version of the catalog, which is accessible through the Sierra Admin Corner.

Arthur MARC Code Maintenance Rotation

Lincoln U.	7/1/13
Columbia College	7/1/14
William Woods	7/1/15
Westminster	7/1/16
Stephens	7/1/17
MOSL	7/1/18

Arthur Cataloging Standards

Cataloging standards provide the foundation for achieving reliable online access to all of the materials shared in the ARTHUR catalog. All ARTHUR libraries should adhere to nationally accepted cataloging standards and guidelines according to the documents listed below. Quality and integrity of the ARTHUR database are necessary in order to maintain reliable access to the shared catalog.

MARC bibliographic records should comply with standards as set forth in these documents:

Resource Description & Access (RDA) 2013 revision.

MARC 21 Format for Bibliographic Data <http://www.loc.gov/marc/marcdocz.html>

Bibliographic Formats and Standards <http://www.oclc.org/bibformats/en.html>

Library of Congress Rule Interpretations

Library of Congress Subject Headings

MARC 21 Format for Authority Data <http://www.loc.gov/marc/authority/ecadhome.html>

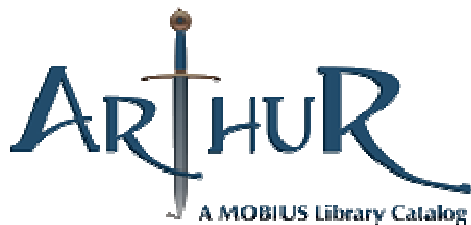
Other sites which may assist you in cataloging include:

Library of Congress Cataloging and Support Office <http://www.loc.gov/aba/cataloging/tools/>

In 2001, the former ARTHUR Technical Services Committee agreed that we should use the MERLIN standards as a guide. Any agreed to, cluster-wide exceptions should be clearly noted. Current standards from the MERLIN Quality Cataloging Committee may be found here:

<http://mulibraries.missouri.edu/staff/catalogdept/MQCC/index.html>

Section II: Authority Control Processing



Objective: Arthur holdings are submitted for Automatic Authority Control Processing on a weekly and quarterly basis. In a weekly processing, each individual library receives a report of records which require attention. The quarterly report is quite large and is divided into fairly equal groups of records with each library responsible for viewing and correcting an assigned segment.

Weekly Heading Procedure

Weekly headings reports are distributed via email from MOBIUS and contain the following types of entries: duplicates, non-unique 4xxs, near matches, blind references, and updated headings. Here is how each type of entry is processed:

- **Duplicates.** If the entry is for a duplicate OCLC number, if possible correct the error by deleting one of the duplicate entries. When doing so, carefully review the duplicates and ensure they are in fact the same and ensure that any necessary fields are carried over from one record to another. If the records are not in fact duplicates or an error exists, contact all institutions with holdings to the duplicate records for verification and final correction. If the entry is for a duplicate barcode, either an item or patron barcode, send the entry to the appropriate institution for correction.
- **Non-unique 4xxs.** Entries for non-unique 4xxs indicate there are more than one authority record with a particular 4xx. In more cases, these entries indicate a duplicate authority record with the 4xx is an initial and is in fact a necessary duplication of the 4xx. If both authority records are valid and needed, there is nothing that needs to be done. However, if the 1xx field of the associated 4xx entries indicates a problem, more research will be needed to ensure validity and accuracy.
- **Near matches.** In most cases, these entries are valid and need no correction or changes. Most entries occur when there is an ampersand in the heading or a non-recognized subfield in the heading. Review the normalized heading given in the report with the correct form of the heading and correct if a problem appears.
- **Blind references.** These entries indicate an authority record for which there are no bibliographic records containing the exact heading. In some cases, the heading plus a subdivision is used in the catalog and hence the authority record is 'blind'. For example, here is a blind reference entry:

Blind references

From: a15749599 SUBJ AUTH 150 laLabor union locals

Function: marc2inn Group: 998 Initials: cag Entry Date: Sep 24, 2013

This entry indicates that 'Labor union locals' is a candidate for being a blind authority record. While no record exists containing exactly 'Labor union locals', there are multiple records where 'Labor union locals' exists with topical and geographical subdivisions such as 'Labor union locals|zOntario|zLondon|xHistory'. In this case, mark the authority record as blind by changing the ACODE1 in the authority record to 'b' and leave all other fixed fields as '- '.

If the authority record is not used in any bibliographic record, either exactly or with attached subdivisions, the authority record is unneeded and can be marked for deletion. To mark an authority record for deletion, change the ACODE2 to the correct index (i.e. LC author, LC subject, LC title) and code the ASUPPRESS as 'd' for delete. Next add the phrase '[DELETE]' after the 1xx field in the authority record. This will help by showing up in the next weekly headings report with the phrase '[DELETE]' in the main heading. If you see this phrase in an entry, it can be skipped.

- **Updated headings:** These are changes made by the vendor to update headings in bibliographic records in accordance with 4xx fields of authority records. These entries should be scanned to see if there are any headings which were erroneously changed. There is no need to search for a heading or record unless there appears to be a problem.

MARS Reports Procedure

Dividing Up MARS Reports

1. Downloaded all reports from Brazil server to computer.
2. There should be six unnamed folders in the main folder as well as a several html files. The folders contain reports already divided up amongst the six members of Arthur. Assign one folder to each institution.
3. To divide up the remaining html files, count the number of entries in each file.
4. Open files in web browser (as all are html files). Where easily noted, count and document the number of entries per file. If not easily noted, follow these steps to count:
5. Copy all content and paste into a blank Word document.
6. If the file is a 'change' file, use the 'Find & Replace' feature to look up how many instances of 'Old version' exist in the file. ('Old version' is at the top of every entry)
7. If the file is a 'delete' file, use the 'Find & Replace' feature to look up how many instances of 'Deleted record' exist in the file.
8. After each file has been counted, add up the number of total entries and divide by six. This will give an approximate number of entries per institution. Then divide all the files trying to balance the number of entries per institution and need to divide up files. For example, Stephens College will get entries 1-200 in the Name Change 1 file and Westminster will get 201-400, etc.
9. When dividing up the larger files, open it in Word and use the 'Find & Replace' option listed in 4.b and 4.c depending on what type of file it is.
10. Once the 'Old version's have been located, review the list of entries and mark the 001 field of the corresponding entries used to divide them up. (i.e. using the example above, mark #1, #200, #201, etc.)
11. Using the 001 fields and the entry division, a listing can be creating and distributing providing a range to each member of the entries they are responsible for in each file.
12. Repeat as necessary with files until they are divided.
13. Copy all files an institution will need to process inside their folder. If Westminster needs to process entries 201-400 of the Name Change 1 file, place a copy of the Name Change 1 file in their named folder.
14. After all folders contain files to be processed and the ranges are noted where appropriate, reload all the named folders to the Arthur Brazil server in the same file from which the original MARS Reports were downloaded.

15. Send an email to all members announcing the posting of files and any details on ranges, etc. that is needed to process the files.

Processing Quarterly MARS Reports

1. There are multiple types of reports in the quarterly MARS Reports. There are those addressing authority records and those giving notice of a potential error in bibliographic records. Each report comes with a list of entries and note at the top indicating how each report is to be addressed. Below is a list of the currently received reports, what they address, how they are to be processed.
2. Unmatched primary heading.
3. The entries in this report indicate that a primary heading did not match an established heading or cross reference in any authority record. Each report contains unmatched headings for children's subjects, LCSH, names, etc. In most cases, the headings are valid, but have not yet been established. Each entry in this report should be checked in the catalog and against the authority file for any needed corrections.
4. Partially matched headings.
5. This report contains primary headings which matched an established heading in an authority record, but the additional subfields were not present in the related authority record. These entries need to be checked to verify that the additional subfields are valid.
6. Split headings.
7. This report includes all authority controlled headings which were "split" during authority control processing. These entries include the original heading and the two, or more, newly created headings that replace the original. These entries need to be checked and verified that both new headings, which are automatically input into the bibliographic record where the old heading was present, are needed and appropriate.
8. Possible invalid tags.
9. This report shows authority controlled fields which matched an authority record with a different tag. Each entry needs to be checked and verified. Many of the headings will be valid and require no processing.
10. Heading matches multiple authority records.
11. Headings in this report matched the established (1XX) or cross-reference (4XX) in more than one authority record. These entries need to be checked to verify that the heading is valid and that duplicate authority records do not exist.
12. Heading usage not authorized.
13. Headings in this report matched a heading in the authority file, but the usage codes in the authority record indicate that the heading is not appropriate for the use to which it has been applied in the bibliographic record. The headings need to be verified and either changed to a different form or have their tags changed.
14. Possible leading articles.
15. The headings in this report contain an initial word that may or may not be a leading article. Entries need to be checked to verify the usage of the possible leading article.
16. Unrecognized subfields.
17. The headings in this report contain one or more subdivisions that were not present in the list of established headings or subdivisions. Each entry needs to be checked to verify it is valid and used correctly.
18. Tags flipped.

19. This report includes authority controlled headings in which the field tag was changed during authority control processing. These changes need to be reviewed and verified.
20. Delete authorities.
21. These reports contain a listing of authority records which were deleted by the Library of Congress and often times replaced by a new authority record. When a new record replaces an old one and the old one is deleted, the text in the 001 field of the old record will appear in the 010 field of the new record. Each old heading needs to be checked in the catalog and changes made to the new heading where appropriate. Then the old record can be deleted directly, regardless of whether it is replaced or simply removed; there is no need to mark the authority record for delete. The authority file with the vendor has already been updated.
22. Change authorities.
23. These reports contain entries which list changes made to authority records. Each entry consists of the old version and new version of the record with changes between the two being bolded. Only changes in the 1xx field need to be checked. If a 4xx in the new version doesn't match the 1xx in the old version, the headings will need to be manually updated in the bibliographic records.

Authority Records: Deletion, Suppression, And Blinds

Suppression

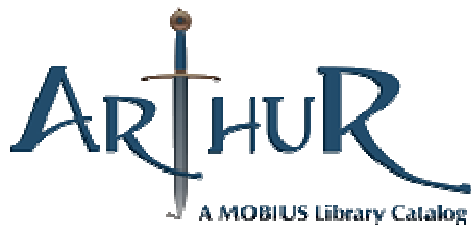
- When a heading exists in a bibliographic record with no records attached, but it is assumed records will be attached eventually, the authority record can be suppressed instead of deleted. To suppress, mark the ACODE1 as either '-' or 'b' BLIND, ACODE2 as '-' DEFAULT and the ASUPPRESS as 'n' SUPPRESS.
- When a heading exists in a suppressed bibliographic record that then becomes unsuppressed, the corresponding authority record should be unsuppressed at that time. Periodically, lists of suppressed authority records should be created and checked for use.

Deletion

- Authority records should be marked for deletion when the heading does not exist in any bibliographic record in the appropriate index (i.e. the subject heading is not found in the 6xx fields of a bibliographic record and needs to be removed from the subject index). Authority records can also be marked for deletion if the heading is only found in a bibliographic record that is suppressed and all items have been withdrawn. Before marking for deletion, check abbreviations and variations in the 4xx field to ensure that the authority record is indeed unneeded.
- To mark for deletion, set the ACODE1 to '-', the ACODE2 to code corresponding to the type of authority record, and change the ASUPPRESS to 'd' DELETE. In the 1xx field, type [DELETE] at the end. This note will then show up in the entries of the weekly headings report and indicates to the next processor that they can be ignored.

Mark as blind

- When the exact heading of an authority record is not found in any bibliographic records except with subdivisions, the authority record can be marked blind. For example, 'Tiger shark' as an exact heading does not exist in a bibliographic record but 'Tiger shark Juvenile literature' does. Hence, 'Tiger shark' is blind. The authority record is kept so that the correct form and any references are available to the patron in the catalog. To mark a record as blind, change the ACODE1 to 'b' BLIND and leave ACODE2 and ASUPPRESS as '-'.



Section III: Specific Procedures For Record Maintenance And Specialty/Temporary Records

Objective: We have occasion to create temporary records for reserves, etc. Such records are designed not to be uploaded to OCLC and to be removed when they are no longer needed.

Course Reserve Standards – Arthur Cluster

Original date of agreement 2/19/03

1. Name

Using upper case letters, enter the faculty person's name in the last name, comma, first name format. If middle initial exists, it should be entered as a capital letter followed by a period with only a space separating it from the first name. (Preferred practice: Person's last name only. We do not put the person's first name unless it is needed for clarification. Full name is used only if the faculty requests such.)

After entering the name, space once, and then enter the campus code in upper case enclosed in parentheses after the faculty person's name.

Campus codes are:

CC – Columbia College

LU – Lincoln University

SC – Stephens College

WC – Westminster College

WW – William Woods University

Example:

HESSLER, ANNE (CC)

TERRY, JAMES (SC)

Enclosing the campus in parentheses following the faculty person's name will help differentiate instructors who teach at more than one location and/or have the same name. The code will make the cluster-wide listings easier to use when searching the index.

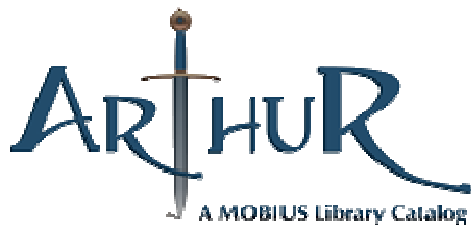
2. Course Numbers

Enter course names as they appear in the campus class schedule or catalog with a space between the department abbreviations and number. Use upper case letters. Follow the entry with a space and then the campus code in upper case enclosed in parentheses.

Example:

ENGL 112 (CC)

REL 201A (SC)



3. Course Names

Using upper case letters, enter the name of the course as it appears in the campus catalog. Follow the course name with the campus code in upper case enclosed in parentheses.

Example:

ORGANIC CHEMISTRY (CC)

RELIGION ACROSS CULTURES (SC)

4. More Than One Course Or Professor

Include all courses and instructors for an item using the same instructor name spelling for all courses so they list together correctly in the Web OPAC. [Enter one entry (faculty name, course number, or course name) per line. Additional names of faculty can be added to a course using the drop down menu. Each course should have its own individual record, but multiple faculty names can be added to record.]

5. Academic Department Or Library Reserves

Use for items that are placed on reserves for or by a department but that do not relate to any specific course or instructor

Example:

EDUCATION DEPARTMENT (CC)

EDUCATION FACULTY (WW)

THEATRE (WC)

REEVES LIBRARY (WC)

The course number and course name fields would not have to be used if they are not applicable. If they were used they would follow the standards outlined earlier in this document.

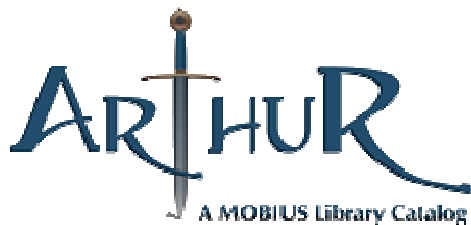
6. Personal Copies Or Photocopies

Enter short bibliographic records for faculty members' personal copies of books or for photocopies with the title and author information in upper case letters. Enter [z] for BCODE3 (bibliographic) and ICODE2 (item) for these short records to suppress the record from showing in the Mobius catalog. We want these records visible in Arthur.

Use this guideline for library owned items without a barcode, such as magazine issues that are not normally barcoded.

If a personal copy is an exact copy of a library owned item, make a short bibliographic record for the personal copy. Do not add personal copy information to the bibliographic record of the library owned item.

7. Library Owned Copy



Suppress the bibliographic record using z for BCODE3 and ICODE2 (item). If another Arthur member is attached to the bibliographic record, then do not blind the record to Mobius, but blind the item record to Mobius. When taking materials out of Course Reserve each item and bibliographic record will have to be looked at and rechecked for setting back the proper codes needed. (So far to date the library system does not automatically reset those codes.)

8. Items Belonging To Other Libraries

Other library's books will not be borrowed for reserves. Libraries who share books are prohibited from doing so.

9. Multiple Courses Used For Same Item

The barcode on an item, personal copy or library owned, can be used for multiple courses. Follow the procedures as outlined in the above document as how to handle each kind of item. When removing the item from Course Reserve each course will have to be done, that is, removing one does not remove the other.

10. End Of School Year

Arthur agreement is to blind all Courses so they are not visible in the OPAC. Items do not need to be status "inactive" as the course record blinded takes care of the visibility in Arthur.

11. Deleting Items And Bibliographic Records

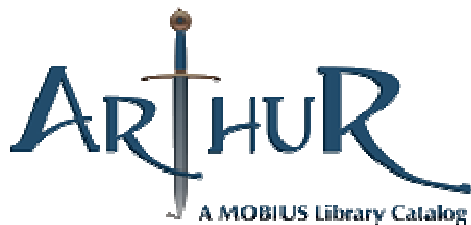
Items and bibliographic records can be deleted by those having the proper permissions to do deleting; it is a cataloger authorization and not restricted to just Course Reserves. Colleges may leave the deleting to the cataloging department of such records. Each college deletes and maintains its own records always.

Items that are inactive and removed from the Course record can then be deleted using the item location code, if desired. Once the create list review file is done for the location code, then the items can be mass deleted by the Coordinator of each college. If the item is still attached to the Course record, it cannot be deleted as it is in protected status. If an item is removed from a course reserve record, it is "hanging" status in the library system until it is again attached to a Course record or part of the mass deleting process by the Coordinator.

Mass deleting of course item records and bibliographic records is not required. It is left up to each college as to when they delete unused records in the system. Mobius suggests cleaning up the records as needed. Mass deleting of items and bibliographic from course reserves is a bit unnerving the first time as literally thousands of records can exist in the system without realizing how many have accumulated over several years. Course records are typically deleted in the course reserve arena.

Short Records Or Reserve Records Show In Arthur Only

Suppress reserve bibs in Mobius and use 099 for call number on the item record. All short records or on-the-fly records need to have the bib suppressed so they won't show in Mobius. Reserve location items will show in Arthur. Call number field (optional) is 099.



Section IV: Procedures For Maintenance Of Active Records And Withdrawal Of Bib/Item Records

Objective: Cooperation is essential when maintaining the high standards expected of our shared records. We have determined which types of minor errors may be corrected on the spot by any catalog librarian, and those which require notification of the owning library for correction.

Circulation Statistics Annual Report

Objective: This involves working with the item records, review file, and Rapid Update in Admin App to switch out the data from the latest fiscal year to the 2nd year field in the item records. Each library and cluster will decide how they want to handle the process.

Procedure:

Create an ITEM review file list consisting of items with YTDCIRC Not Equal to Zero and Agency field.

Example Lincoln is 20. This produces a review list of items that have been checked out during this past school year. Using RAPID UPDATE you can change the time frame for YTD Circ statistics found on the item records.

Now go to Admin App. System Files. Admin Corner. Launch Admin App. Select (C) Circulation subsystem. (R) Rapid updating.

First question: What kind of records do you want to update? (I) Item records.

Next question it asks. Do you want to maintain YTDCIRC and LYRCIRC? Answer : YES

It will then ask: Zero the YTDCIR totals? Answer: YES

(If you press “y” then the system zeros the entry in the YTDCIRC field, so you can begin a fresh count for the new statistical year.)

Finally: Add YTDCIRC to LYRCIRC. Most libraries ‘ADD’.

Reason: Most libraries want to have a running total on how many actual checkouts have occurred on the item for its existence.

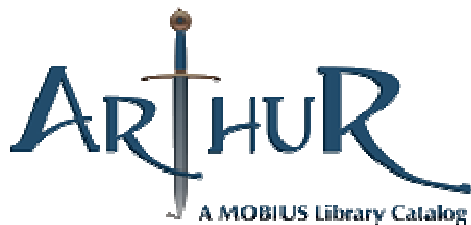
Other option : R. Replace LYRCIRC with number in YTDCIRC

It will ask you if you want to update the review file. Answer: Yes

Find the file in the Review List that you had just created. So be sure you know the number of the review file you will need as you will have to scroll down thru the listings to find it.

Now run the process as all settings are correct. This will take a couple of minutes at most, so do this at a time when activity is low as you want no interruptions or problems when this process runs. You could be modifying as high as 15,000 records depending on your circulation activity for the year.

****Important:**



Once the process has run thru the listings, it will give you a number so be sure to write it down as that is the number of checkouts on your system in the last year. This is the only place you will see this number and once it has ran, it has ran and you won't see this number again.

Pick an item record that was checked out this fiscal year. If you go back to that item record you will then see that this process has moved your stats and your library is now ready to start its count for the new fiscal year.

Objective: When an item is withdrawn from the catalog (replacement, loss, etc.) the bib and item records are retained for statistical purposes, but marked as withdrawn and suppressed from view in the catalog.

Record Merging Policy

Merging records usually occurs when there are two or more bibliographic records that are the same item. There should be no deletion of fields, but additional fields can be transferred to enhance the record. If there appears to be a duplicate record, email the library contact person for cataloging. Provide the bibliographic record numbers and title of the item. The contacted cataloger should respond to the email.

Error Reporting Procedure

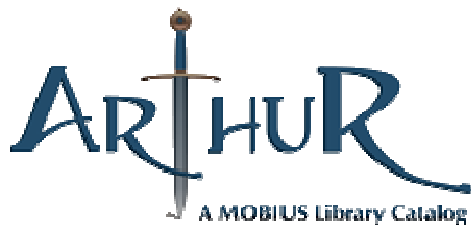
Errors in the Arthur catalog would include possible misspelling, unsuppressed bibliographic records with no holdings, duplicate records, etc. Errors in the Arthur catalog should be reported by email to the appropriate contact person at the Arthur library that contributed the bibliographic record to the catalog. The email should contain the bib record number and a description of the problem. The receiving library should reply to acknowledge the email.

Errors in the MOBIUS catalog should be reported with the Cataloging Error Report Form posted on the MOBIUS website at <http://mobiusconsortium.org/forms/cataloging-error-report-form>.

Withdrawing Materials From The Catalog

When withdrawing an item from the catalog, a library may choose to delete the item record or suppress it depending on whether the item is in hand or missing at the time of removal.

- Deletion method: this method will not provide any statistical information or reports as the record will be completely removed from the system.
 1. Delete the item record
 2. Delete/modify the check-in or other records as appropriate.
 3. Delete the bibliographic record if no other Arthur holdings are attached to the record.
- Suppression method: this method is used for item discarded or withdrawn materials for which the records are kept for future information or reports.
 1. In the item record, change ICODE2 to 's' (NO CEN/SUP LOC) to suppress the record.
 2. In the item record, change the STATUS to 'w' for WITHDRAWN.
 3. In the item record, add an internal note ('x') giving the date of withdrawal along with any other important information. (for example: Withdrawn 09/27/13 for damage)



4. In the item record, change the LOCATION to reflect that it is withdrawn. If the item is in hand at the time of removal, use the __wdi location code. If the item is not in hand, use the __wii location code.
5. In the item record and if appropriate, change the ICODE1 to mark the record for deletion from your list of holdings in OCLC. Below are the appropriate codes for sending the item to OCLC for removal of holdings:
Columbia College: 101
Lincoln University: 102
Stephens College: 103
Westminster College: 104
William Woods University: 105
Missouri State Library: 106
6. If the item being removed is the only item attached to the bibliographic record, suppress the bibliographic record by marking the BCODE3 to 's' (NO CEN/SUP LOC).
7. The LOCATION code in the bibliographic record will be updated as appropriate during the nightly update. If you wish to change the LOCATION code and hence suppress the record from your scope, you can do that at this time. Otherwise, the bibliographic record will appear in your scoped catalog until it is updated.
8. Where appropriate, modify check-in record fields such as SCODE3 (to 's') or an 863 with holdings information to reflect changes in holdings or complete withdrawal.
9. After a certain time period or after statistical reports have been run, withdrawn items and associated bibliographic records with no active holdings can be deleted from the catalog.

Batch Processing

Arthur has uses 20,000 records as a good rule of thumb for batch processing such as global updates, rapid updates, annual circulation stat flip, etc. The below information is from Christopher at Mobius.

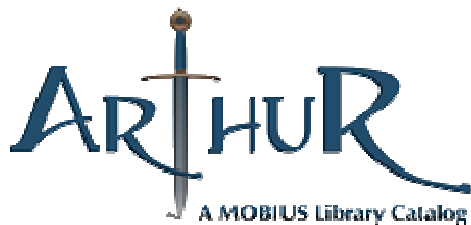
Processing & indexing works differently in Sierra than it did in Millennium. There is no longer a transaction file to fill up and keep an eye on. There is still, however, the update queue to the INN-Reach central server (MOBIUS). If the queue to central backs up (i.e., if there are more updates in the queue than INN-Reach's control can process efficiently), then your updates become less "real time" on MOBIUS. This includes circulation data.

If you're doing a large batch update and you want to keep an eye on the queue to central, you can see it in the same place you used to look at the Transaction File: character-based (now Admin Corner) M-I-F-S. The key line is here:

Link to MOBI all caught up.

This ^ is what you want to see. If there are unprocessed transactions waiting to be updated, the line will read something like this:

Link to MOBI starts at 213, and has 900 records, file is 0% full.



The number to watch is that middle number. This is the number of unprocessed Arthur records waiting to be updated in MOBIUS. If that number gets to be more than 5K, it's a good time to stop your update and wait for it to drop back down to zero.

Appendix

RDA

The print bibliographic records with BCODE3 “-“ were re-mastered in 2014 with some RDA updates. Authority processing for all new records will have the RDA changes according to the profile set up in 2014. Records processed were stamped with “UtOrBLW” in the 040 field. The 007 fields were not added. The #h in the 245 field and the GMD terms in brackets was kept. The 336-338 fields were added. The 260 and 264 fields are agreed as okay in the record to be added or if there, not stripped when cataloging a record. We did not convert the 260 to 264.

Abbreviations to be changed were:

[et al.] to [and others]

ca. 1999 to 1999?

300 field all abbreviations spelled out

Date changes for \$f & \$d

Date changes for:

b.1945 to 1945-

d. 1945 to -1945

fl. 1945 to active 1945

The following terms were also to be spelled out:

Violincello to cello

Acc. To accompanied

Unacc. To unaccompanied

Arr. To arranged

Relator abbreviations were to be expanded and the \$4 relator codes converted to \$e relator terms.

The testaments with books were to be removed and abbreviations for O.T. and N.T. expanded.

The Koran spelling changed to Qu'ran.