

# How to Add Materials (+Specific Policies)

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## Primary method

- **First step:** Open Access database (Library Database.accdb)
- **Second step:** Open Add/Edit Materials Form and click “Add record” button at top
- **Third step:** Grab the physical item from the shelf – you cannot determine publication date, publisher, or edition statement from just the cover
  - Use copyright page to determine info for fourth step
- **Fourth step:** Look up OCLC record for item in Worldcat
  - Navigate to <http://library.unc.edu> and click the Worldcat link (second row of text under search box)
  - Search for item using title on title page (NOT the title from the cover! They may differ!), author last name, ISBN number, or any other method that works for you
    - Worldcat does not play well with semicolons, so if your item has a secondary title, just leave it off when searching – add other criteria if your search is too broad (like author last name or ISBN)
  - **MAKE SURE YOU CHOOSE THE RIGHT RECORD! THIS IS REALLY IMPORTANT!** Compare the following information between the **physical book** in your hand and the **record on your screen**: Author, publisher, publication date (watch out for printing dates and runs – for example, if something says “First Plume book printed December 1987” and the publisher is Plume, then your publication date would be 1987. If a book says it is a revised/expanded/x-th edition, usually go with the later copyright/publication date. However, if it says “2<sup>nd</sup>/3<sup>rd</sup>/x-th printing,” don’t worry about this statement. Printing runs are secondary copies of the same publication information, so look for “copyright 19\_\_/20\_\_” or edition statements, like “Bantam edition” with a year to determine the correct copyright date.
    - If you have any concerns about the book you’re looking at, compare OCLC records until you find the one that best matches your book in terms of the other criteria (number of pages, ISBN, publisher, etc.) and go with that one, assuming the date on the OCLC record is listed somewhere in the publication information in the book), edition, and description (page numbers should be exact, including forewords [xvii], ill. should be listed for books with pictures/graphs/illustrations, and the size should be roughly correct)
- **Fifth step:** Use information from OCLC record to fill in the “Add record” form in Access
  - **Subject category** ideas are generated by: a) going by the subject already assigned to the book (if applicable), or b) subjective judgement – knowledge about the book’s subject can be gained from descriptors in OCLC record or by briefly reading through the item synopsis/chapters/introduction
  - Leave **call number** field blank until item is cataloged in the system
  - For the **author field**, if the author is actually an editor, add “(Ed)” to the end of their name
  - If an **edition statement** is not listed in the OCLC record or item’s publication information, leave this field blank

## How to Add Materials (+Specific Policies)

---

- Check for existing copies in the Library Catalog table – if this is the first copy, put a 1 in the **Copy Number** field. If not, put the correct copy number instead. (Each book must have its own record, even duplicate ones!)
- **OCLC number** can be found at the bottom of the OCLC record, under Accession No.
  - If no OCLC record exists for the item (very rare), put “No OCLC record” in the Additional Notes field
- For **location**, simply click the words “LGBTQ Center Library”
  - An “Other” option exists just in case, but don’t worry about this
- The **Additional Notes** field is a catch-all field for extra information that may be necessary to know. Here are some instances you’ll use it:
  - if the book is really warped, water damaged, stained, marked up, or otherwise aesthetically and functionally damaged, make a note of this in the with the date and your initials at the end [Ex) Water damaged 11/26/14 ke]
  - If the book’s Worldcat description says that it is 27cm or larger, add a note which simply says “Oversized” (then put the book in alphabetical order by author last name, located on the spine label, on the oversized shelf by the refrigerator)
  - If the copy in your hands is autographed by the author (yes, this does happen), make a note in the notes field [Ex) Autographed copy]
  - This is a non-exhaustive list, so if you think there’s something about the book in your hands that someone might like to know (like existing damage so that the next person to check the book out isn’t blamed for damaging the book or extensive pen markings in the book), put it in the notes field. Unsure if it’s important? Put it there anyway
- Finally, for the **Last Edited** field, just click on the calendar icon that appears to the right of the field and click today’s date
- Once the fields are all filled in (to the degree necessary for the item), click “Add record” again to add the record to the database
- To find the record you just created, click on “Library Catalog” and do one of two things:
  - Either search for the title (full title is required; also ensure that “Look in:” specifies “Current document” so it will search the whole spreadsheet, not just the field your cursor is in), or
  - Sort the Title field A-Z (right-click field heading to do this) and search for the title from the alphabetical list
- Ensure that EACH ITEM has its own line/record – if there are four copies of a book, there should be four records (with copies 1,2,3, and 4 specified)
- **Sixth step:** Once all new items have been represented in the Access DB, click on the External Data tab in Access (with the Library Catalog table open) and under the Export section, click the “Excel” button. This will start a Wizard which will create an Excel spreadsheet version of the

## How to Add Materials (+Specific Policies)

---

database to be uploaded to the website. (This is how the RDM staff will know what we need cataloged, so this step is very important.) Save the destination file as “J:\LGBTQ\Library\Library Database\(*insert date, like 7.29.2015*) Library Database.xlsx” and click the first two checkboxes under the export options section. Click “OK” and your new Excel spreadsheet should open and be ready to replace the old catalog file on the website

- **Seventh step:** Keep a list of items added to the Access catalog so that once the items are cataloged by the main library’s cataloging department (RDM), we know what items to look up to get the new call number (in case they are not able to pull a list for the Center)
- **Eighth step:** Once the items have been cataloged by RDM, re-label them with the newly-assigned call number, record the call numbers in the Access database, and shelve them in the proper section

### **Secondary method (only use this if University Libraries cannot catalog items for the Center)**

- **First step:** Input item into Access database using instructions in Primary method
- **Second step:** Check UNC catalog/OCLC for UNC holdings
  - *If not held by UNC:* Allow RDM department to catalog it by emailing [name/email removed for privacy] with the item’s title, OCLC number, publisher, and publication date, then skip to step four
  - *If held by UNC:* Proceed to step three
- **Third step:** Input each copy of the item into Millennium
  - First, use your ONYEN and password to log into Millennium (contact [name/email removed for privacy] or [name/email removed for privacy] to get your login set up)
  - Look up the item by title, author, or OCLC number, whichever is easiest
    - **MAKE SURE YOU GET THE RIGHT RECORD!** Single click each record to see a preview of the bib information so you can compare publishing date, publisher, author, and other important information to the physical item or Access record
  - Once in the record, click the “View” button for the MARC record to ensure this is indeed the right record – check language (only use English, or eng, records), edition, publication info, item description (check page numbers and height to make sure they align correctly), and OCLC number (found in field 001, Bib Utility No.)
    - Click “Summary” to get back to the item record when you’re sure this is the correct record
  - Copy the call number of existing copies of the item from other libraries (only use call numbers with MARC fields 050, 090, or 099\_9 – if anything else, contact [name/email removed for privacy], who will assign a LC call number for the item)
  - Click “Attach New Item” > “Don’t use a holdings record” > “Single Item”
  - Enter copy number (start with 1 for first copy added by us, even if other copies exist from other libraries)
  - Paste in call number from earlier
  - Skip past Volume, Public Note, and Internal Note

## How to Add Materials (+Specific Policies)

---

- Exception: if the item is water damaged or otherwise marred in some obvious, tangible way, put an internal note about the damage, followed by the date and your initials
- If the item you are cataloging is oversized (27cm or more in height), after skipping past these fields, click on the end of the public note with our contact information, then right-click and hit “Insert Field.” From here, add a Public Note with the word “Oversized.” It is important that you add this note last because you want it to come AFTER the contact information. (If you add it earlier when prompted, you have to right-click the contact info note and click “Move Up(H)” each time)
- After inputting all the relevant info, look over your record one more time to ensure everything is correct – the template should have auto-filled most fields, but it pays to be vigilant
  - If you’re cataloging an audiovisual material, make sure you change the Status from “j CONTACT LIB. FOR STATUS” to “o LIB USE ONLY”
- Once you’re sure everything is correct, click “Save” to save the new item. Now you should see it in the list if you click the “Summary” tab!
- Side note: Do not be discouraged if it takes the item a while to show up in the front-facing [catalog](#) (called Endeca). It can sometime take days to update. If you want to see your work immediately, look in the [Classic Catalog](#).
- **Fourth step:** Label the book (if cataloged, use assigned call number; if not cataloged, use the first three letters of the subject assigned in the Access database, then the first three letters of the author’s last name. If no author exists, use the first three letters of the title
- **Fifth step:** If the book is labeled with a **call number**, shelve it in the section with re-labeled books. Make sure you keep them in the proper order [HQ76.6 before HQ76.7, for example]. If the book is labeled with a **subject and author**, shelve it in the proper section in alphabetical order

### Specific cataloging policies for our materials:

- Materials 27cm or more in height must be moved to the Oversized shelf
  - Materials must also be marked in Millennium as “Oversized” in a public note (z note) underneath the existing note with the Center’s contact information
  - All oversized materials are located on the larger bookshelf by the refrigerator
- When copying call numbers from existing materials in the UNC collection to use in our records, only use call numbers in MARC fields 050, 090, or 099\_9 (for audiovisual materials – see DVD accession numbers for more details on building these special call numbers)
- Watch out for books only held by NOH, NCC, RBC, SILS Juvenile, and Gov’t docs (and probably others) since they probably aren’t using LC call numbers

## How to Add Materials (+Specific Policies)

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- In the case that all existing copies of materials through UNC are classified using non-LC call numbers, contact [name/email removed for privacy] and she will create a call number for you (include item title and OCLC record number)
- DVD accession numbers: Use the 099\_9 marc tag and start them as a fresh run of accession numbers using the format type-sequential number. So the first DVD cataloged will be DVD-1, the next is DVD-2. Same goes for other formats VHS-1, VHS-2, etc. The accession numbers are unique to each library, just like copy numbers. You'll need to track the last used number for each format so you know what the next number to use will be in the future.
  - **Last accession number used for DVDs:** DVD-1
  - **Last accession number used for VHSs:** N/A
- Always create a new record for each item inputted into Millennium or stored in the Access database
  - Ensure that you assign copy numbers in both Millennium and Access database – Millennium will prompt you for the copy number, and Access has a field between Publication Date and OCLC Number
  - Always start with copy 1 for each book, even if other libraries have multiple copies of the same title
- Default Status for DVDs/VHSs in Millennium: ○ – Lib use only
- Default Status for all other items in Millennium: j – Contact lib for status
- Only books in English and Spanish should be retained in the collection. This decision was made by the Director of the LGBTQ Center, because materials in other languages see such infrequent use. If you come across item(s) in a language other than English or Spanish, check and see if Davis Library wants the materials. If they do, donate the material(s) and make sure to ask for a receipt (sent to [email removed for privacy])
- In general, always go with the UNC held record in OCLC if the information matches to minimize duplication of records. There will often be multiple copies of a record for the same item, so try to choose the record that matches your item exactly and has the highest number of library holdings (especially if not owned by UNC)
- Enter as much of the following information as possible when inputting items into the Access database:
  - Call number
  - Title (use the one on the title page with author and publisher info, NOT the fly page)
    - It is recommended that you don't use the ":" included in many titles – it has to be stripped out when searching titles in the Worldcat database
  - OCLC number (limits questions later, you can obtain them in Worldcat or Millennium if we hold it)
    - Most books have multiple records to choose from, so be cautious when choosing a record!
  - Number of copies and which copy this book is
  - Edition statement

## How to Add Materials (+Specific Policies)

---

- Publisher (some books can be published by two publishers in the same year, making just the pub year insufficient). This also applies to the title being published in two different countries in the same year (e.g. a USA and a UK edition – may or may not have the same publisher).
  - Add publisher location in parenthesis if published outside the US
- Publication year (watch for printing dates too)
- Author (up to the first three; add “(Ed)” to the end of the name for editors)
- Location (this will probably always be LGBTQ Center Library)
- A notes area for odd information you want to make note of/reminders, etc. (e.g. signed by author, water damaged, includes CD-ROM in back of book, etc.).
- People you may need to contact:
  - [names/emails removed for privacy]
  - See “Contacts.docx” under for more contacts