



Sitka Training for Spruce Libraries Spruce Rally Day

Cooperatively Cataloguing in a Consortium

Cataloguing Flowchart

<https://bc.libraries.coop/wp-content/uploads/2014/11/Handout-CooperativelyCataloguinginaConsortium.pdf>

Missing Cover Images

1. Check the MARC record to make sure the correct ISBN is entered in the 020
2. If the cover art is missing you can contact Content Cafe
 - a. Email = contentcafe@btol.com.
 - i. Title & ISBN required
 - ii. Usually takes two to three days for the missing cover art to be added.

RDA resources

- The Library of Congress training materials for RDA - http://www.loc.gov/aba/rda/training_modules.html
- RDA: Resource Description and Access - Frequently Asked Questions - <http://www.bac-lac.gc.ca/eng/services/cataloguing-metadata/Pages/rda-faq.aspx#howdoi>
- RDA in MARC - <https://www.loc.gov/marc/RDAinMARC.html>

Fixed Fields / Control Fields

The coding used in the fixed fields and its meaning depends on the type of item. The Library of Congress' MARC Standards are a good resource when looking at which values to use.

<https://www.loc.gov/marc/bibliographic/bd00x.html>

A chart showing which fixed field characters are used to determine which format icon or format filter can be found in the Sitka Evergreen Manual <http://docs.sitka.bclibraries.ca/Sitka/current/html/marcedit-formatfilter-icons.html>

Library Question: What are the main things to consider when creating original MARC records or MARC records from scratch?

- **Answer:** Characteristics of a "Best" MARC Record in the Sitka Database -
 - <http://docs.sitka.bclibraries.ca/Policy/current/html/policy-cat-procedures.html#policy-cat-best>
 - <http://docs.sitka.bclibraries.ca/Sitka/draft/html/cat-minimum-MARC.html>

Z39.50

If you cannot find an existing record for the item you have in hand you can import a record from Z39.50

http://docs.sitka.bclibraries.ca/Sitka/current/html/MARC_Z39.50.html#Import_Z39.50

There are times when it is necessary to overlay an existing MARC record in Evergreen with a better MARC record from a Z39.50 target. Overlaying a MARC record replaces an existing MARC record and leaves all holdings, and corresponding holds, active circulations, bills, and fines intact.

http://docs.sitka.bclibraries.ca/Sitka/current/html/MARC_Z39.50.html#Overlay_Z39.50

Important -> If the record that you wish to overlay contains local information you need to manually add these tags to the record you intend to import.

InterLibrary Loans

Procedures for inter-library loaning from other Spruce libraries (doc attached)

Important things to remember

1. Items follow the policy of the check out library
2. Pre-due and overdue notices are generated by the check out library
3. You must use the item's physical barcode
4. ILL rules = 1 checkout with no renewals
5. Title Level holds should be used
6. The sending library should **never cancel** a hold they need to **contact the requesting library**
7. Never place a hold on a book that's title/shelving location/call number indicates the book is an ILL

Library Settings related to Holds

Holds: Has Local Copy Alert

- If there is an available copy at the requesting library that could fulfill a hold during hold placement time, alert the user

Holds: Has Local Copy Block

- If there is an available copy at the requesting library that could fulfill a hold during hold placement time, do not allow the hold to be placed
 - Note - this setting will block holds on all available items for **all patrons**

Holds: Default hold shelf expire interval

- The amount of time an item will be held on the shelf before the hold expires

Library Question: Home library would like to know where their items are how do they track their in transit items?

- **Answer:** The Transit List report can be used as a tool to help manage your incoming and outgoing transits
 - <http://docs.sitka.bclibraries.ca/Sitka/current/html/transit-list.html>
 - Transit details can be viewed in the Item Status interface
 - You may find out the source and destination library of a transit on the Item Status F5 screen - <http://docs.sitka.bclibraries.ca/Sitka/current/html/transit-details.html>

Library Question: Can you create a report telling you which ILL records to be deleted?

- **Answer:** Yes - report templates are available in Sitka Templates
 1. Sitka_templates -> Collection -> Others -> Pre-cat item list with current title and author (non-deleted only)
 - Use this template if you use pre-cat records for ILLs
 2. Sitka_templates -> Collection -> Copy List by Item Attributes -> Shelving Location : Copies with Selected Shelving Location
 - Use this template if you use temporary MARC records with a specific copy location for ILLs

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More discussion is required to create a comprehensive best practices document for holds and ILL.

Reports

Resources

- Training manual - <http://docs.sitka.bclibraries.ca/Sitka/current/html/report.html>
- Reports Videos playlist - <https://goo.gl/ETy9Yh>

Tips

- When setting up a recurring report always choose relative date
 - The actual date will be calculated when the report runs. Unlike a real date the actual value of relative date is adjusted according to the run time.
- It is important to choose a monthly template when setting up monthly recurring reports
 - Sitka_templates -> Circulation -> Monthly Circulation Stats
- Always set-up the report to run at the beginning of the next month and not the end of the current month.
- When dealing with a date range - the earliest date is entered first (in the top box)

Q&A

Library Question: What is the validate button used for?

- **Answer:** The validate button is found on the MARC edit interface. Clicking on this button will check to see which controlled fields have valid authorities. This button is **not currently used in Sitka**

Library Question: How to create a bucket from a report

- **Answer:**
 1. Open report output in Excel
 2. Delete all columns other than the barcode column
 3. Delete any heading row
 4. Save as a .csv file
 5. Open the Item Status interface
 - Cataloguing -> Display Item [F5]
 - Make sure "Trim List" is unchecked
 6. Click *Upload from File* -> choose your file -> Open
 7. Highlight all items in the list
 - *Left Click* on the first item in the list then *Shift+ Left Click* on the last item in the list
 8. Actions for Cataloguers -> Add to Item Bucket
 - Add to New Bucket -> Enter Bucket Name

*I have added this to the list of potential Sitka Snippet Videos (*watch for video coming in 2017*)

Library Question: Need clarification on Cloning of patrons - can you change just one card without it affecting all the others or are they permanently attached?

- **Answer:** If your library chooses to link the addresses, the addresses shown in the new record is greyed out and they can only be edited in the original record.
- The linked addresses can be **replaced by new ones**.
 1. Using the New Address button you can create a new address and mark it as both the Mailing and Billing address.
 2. Once the record is saved, the linked addresses will be replaced.

Library Question: Once you delete an item is it deleted from the patron's history?

- **Answer:** No - the item will still display in the Patron's check out history in the OPAC if they have chosen to track check out history

Library Question: Is there some way to get a patron's borrowing history?

- **Answer:** Patrons' borrowing history is viewable by patron in My Account only
 - <http://docs.sitka.bclibraries.ca/Sitka/current/html/opac-account-preferences.html>

Library Question: Wish list item – an inventory module that works and provides more information

- **Answer:** Sitka's Inventory Procedure - <http://docs.sitka.bclibraries.ca/Sitka/current/html/inventory-inventory.html>
 - Inventory in Evergreen involves staff checking in all items in a specific area and then running a report to list all the items that were not scanned.

Library Question: Bad check digit, possibly due to a bad scan

- **Answer:** Uncheck Strict Barcode on the Check In [F2] Interface

1 Item Check In +

Check In or Process Item

Check In

Enter Barcode: Effective Date: 10/ 27/ 2016

#	Alert Message	Balance Owed	Barcode	Bill #	Checkin Date	Family Name	Finish	Location	Route To	Start	Title	

Printer Prompt Trim List (20 rows) Fast Entry (Asynchronous) **Strict Barcode**